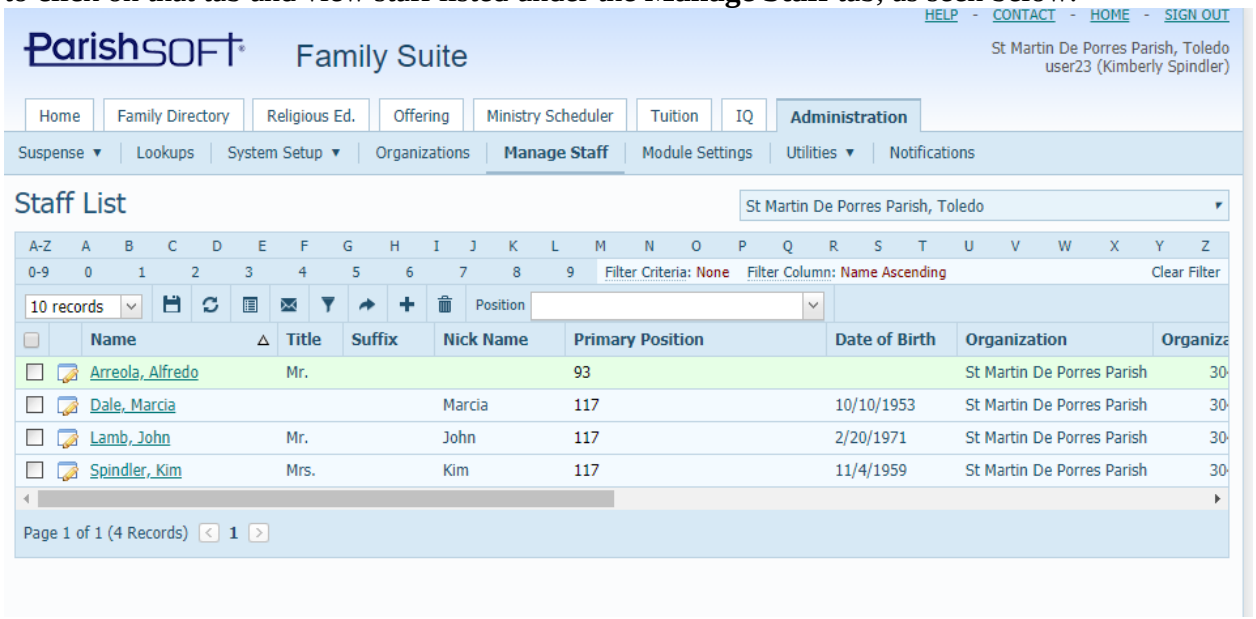
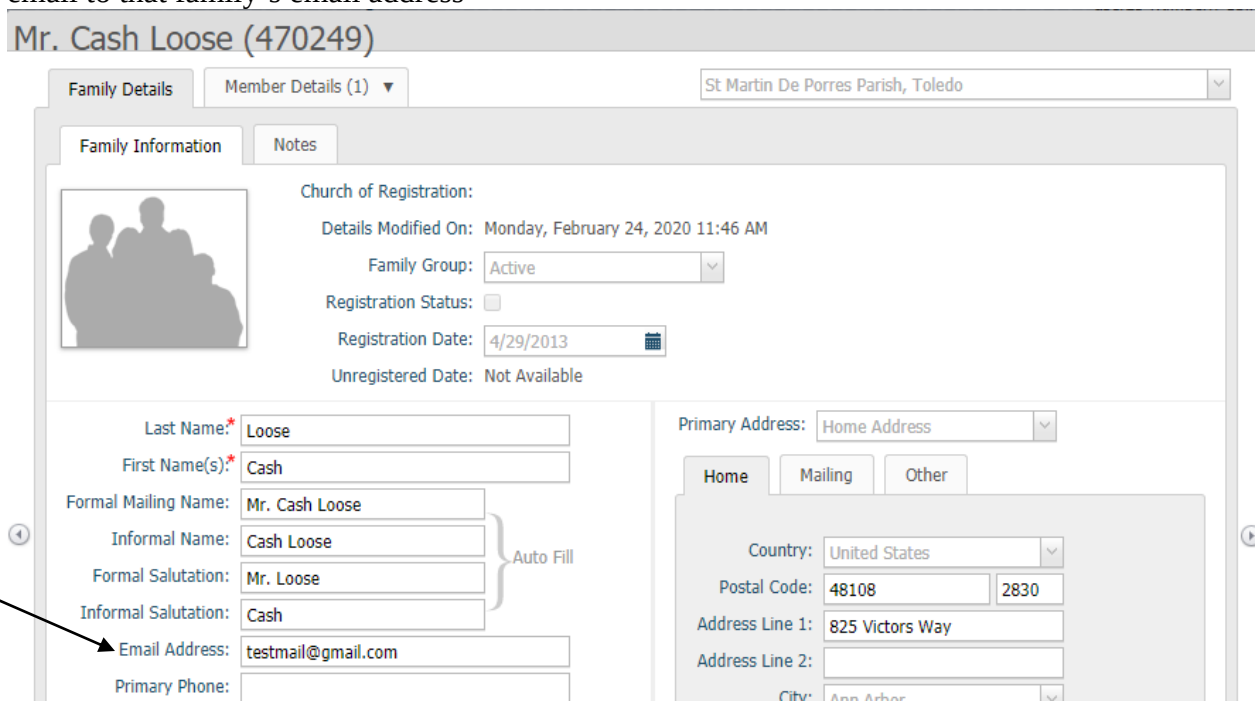
Setting up Email preferences

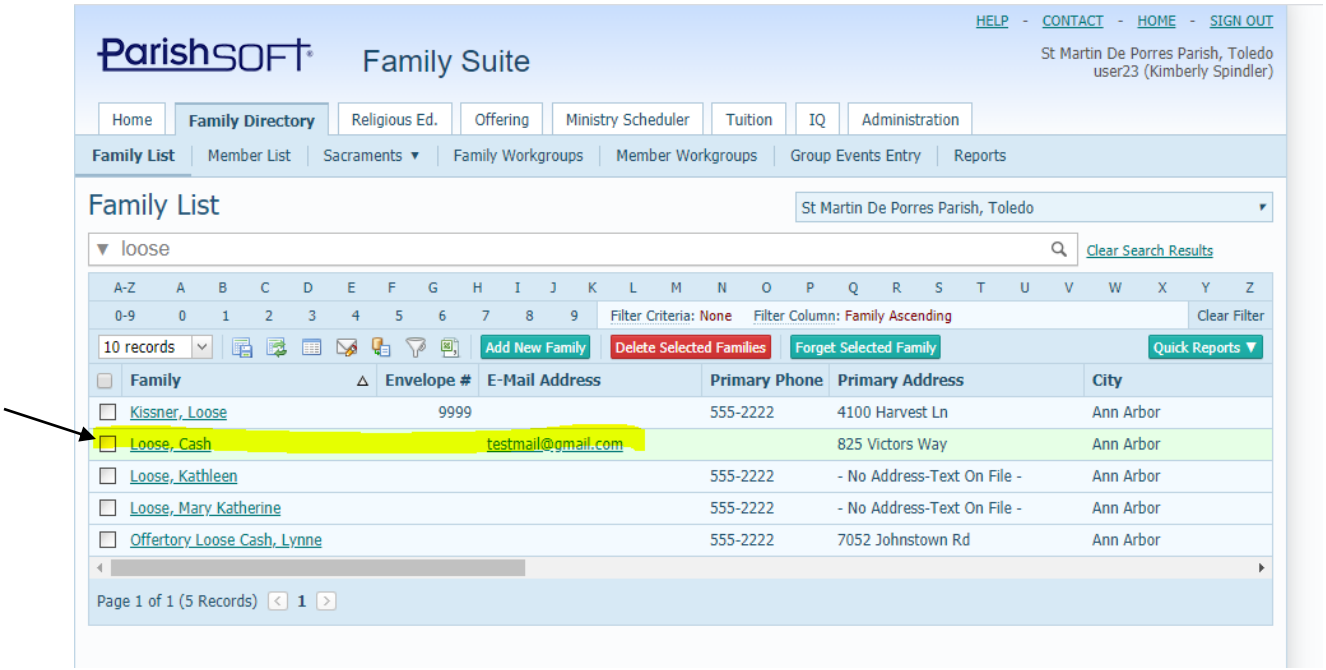
1. You must be an administrator in the ParishSOFT platform to set up email preferences for other staff members. You should be able to see the tab labeled **Administration** and be able to click on that tab and view staff listed under the **Manage Staff** tab, as seen below.



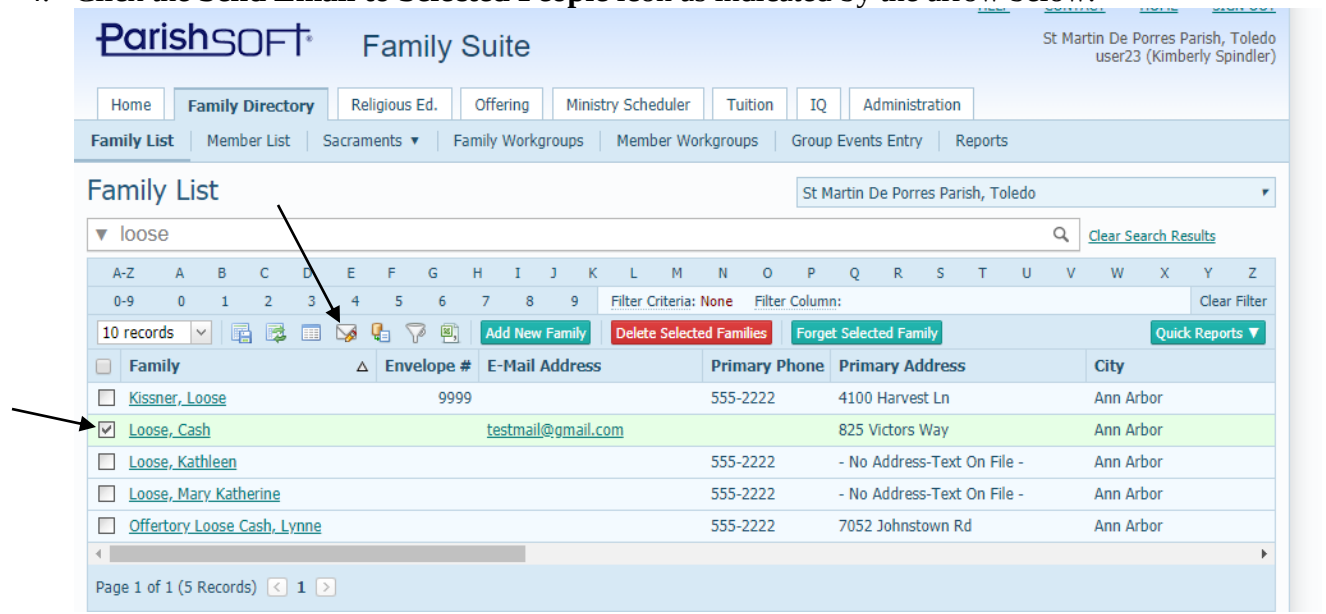
2. First, set up and test your own email prior to setting others up. If you have a generic "Loose Cash" or "Loose Checks" family, please go into your **Family Directory** and add your "test" email to that family's email address



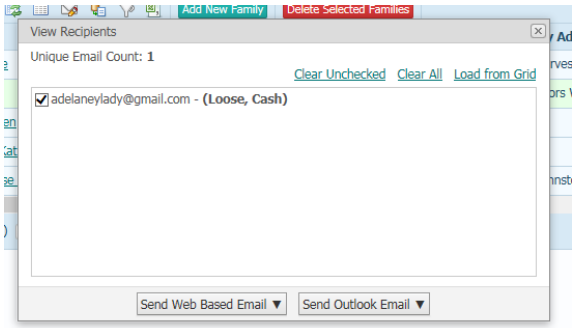
3. Click **Save & Close** and you should still see the family with your test email on the main screen, as seen below. Click the box on the far right side to select ONLY that family.



4. Click the **Send Email to Selected People** icon as indicated by the arrow below.

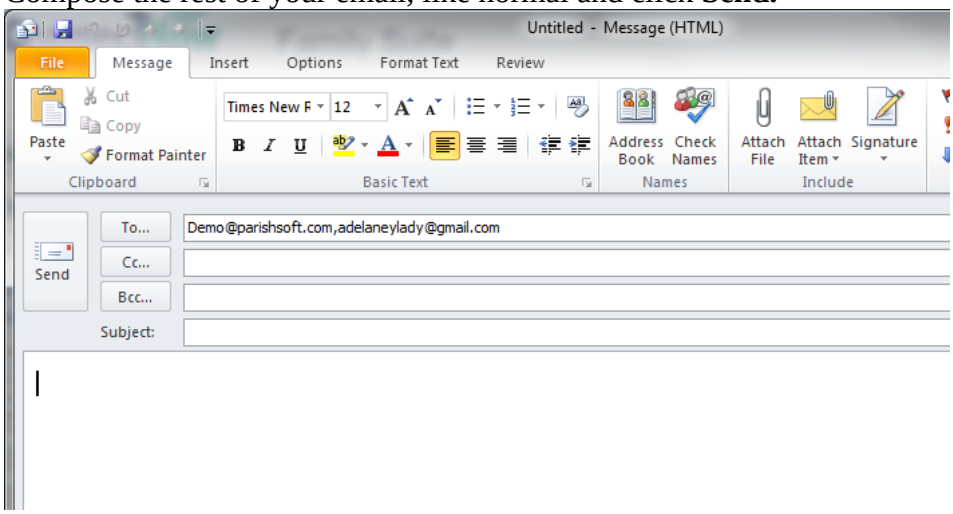


5. We will see the following screen where we need to select whether we have Outlook set up on our computer, or that you are using a web based email (like Gmail).

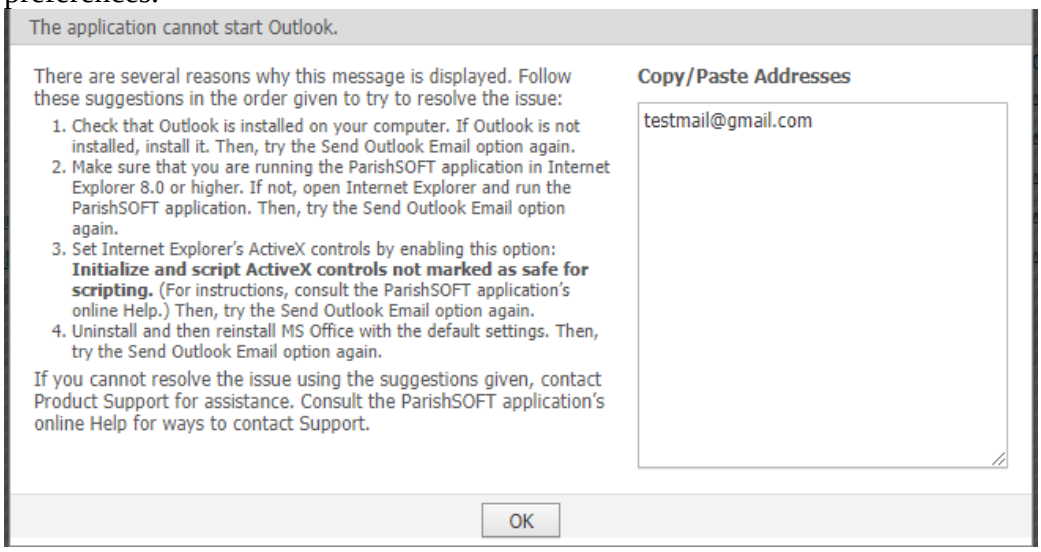


a. If you click on the **Send Outlook Email** button you will see the screen below which will open up on your computer. If you don't notice it right away, look at your Outlook icon to see if it is flashing with a new message.

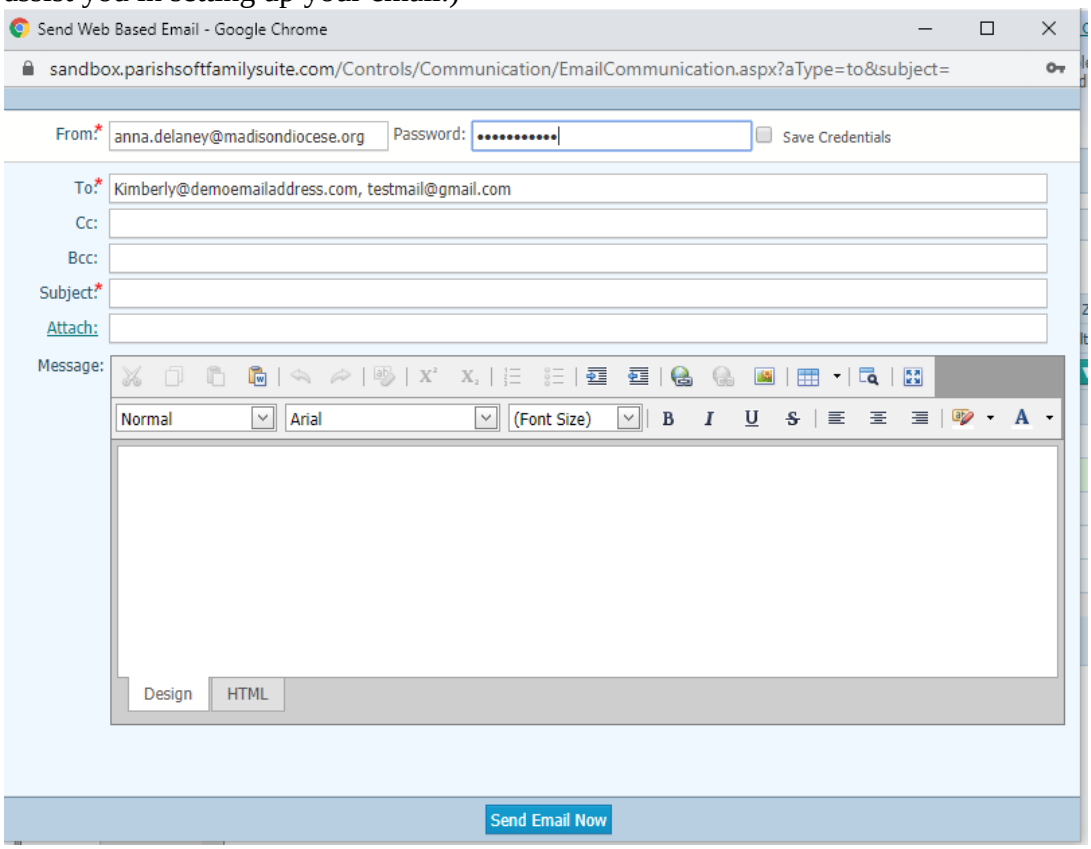
Compose the rest of your email, like normal and click **Send.**



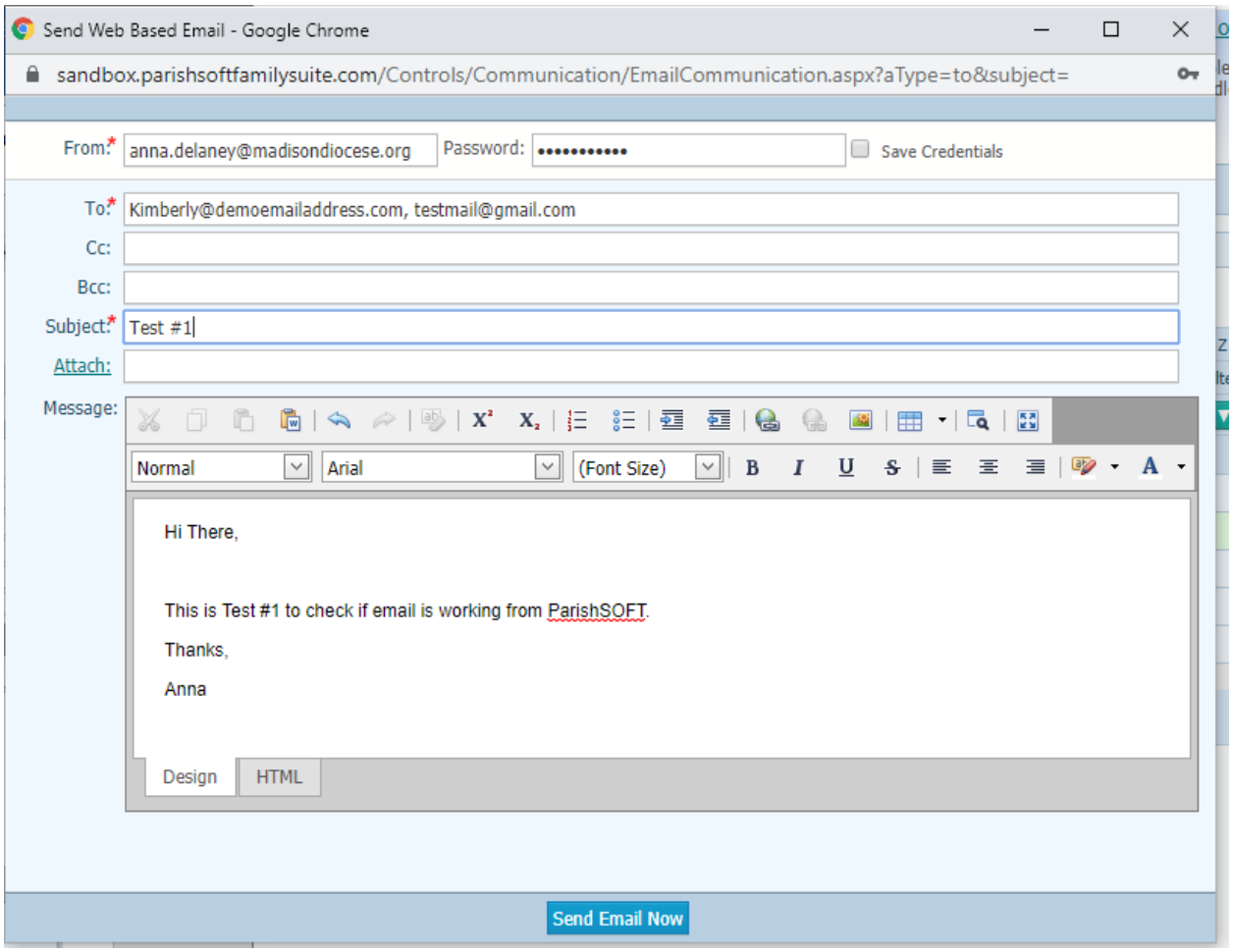
If you do NOT see this message and instead see the one below, contact ParishSOFT support for additional assistance in setting up your email preferences.



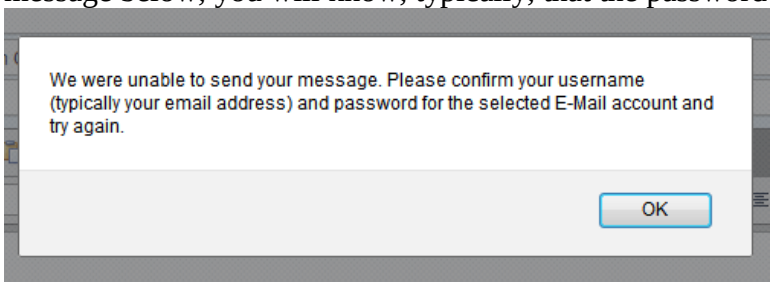
b. If you have clicked the **Send Web Based Email** you will see the following screen shot. (Please note: The **Send Web Based Email** will work automatically with the major providers like Gmail, Hotmail, AOL, Yahoo, etc. If you have a different vendor, you will need ParishSOFT to assist you in setting up your email.)



6. From this screen, you will need to verify the "from" email and the password associated with that email. (This is the password you normally type into your email when accessing it through the web.) After filling in the information about your email settings, including the password, click the **Save Credentials** box and write in some information for a test email. If you number your tests, as seen in the example below, so you will know which try worked, if you do multiple email attempts.

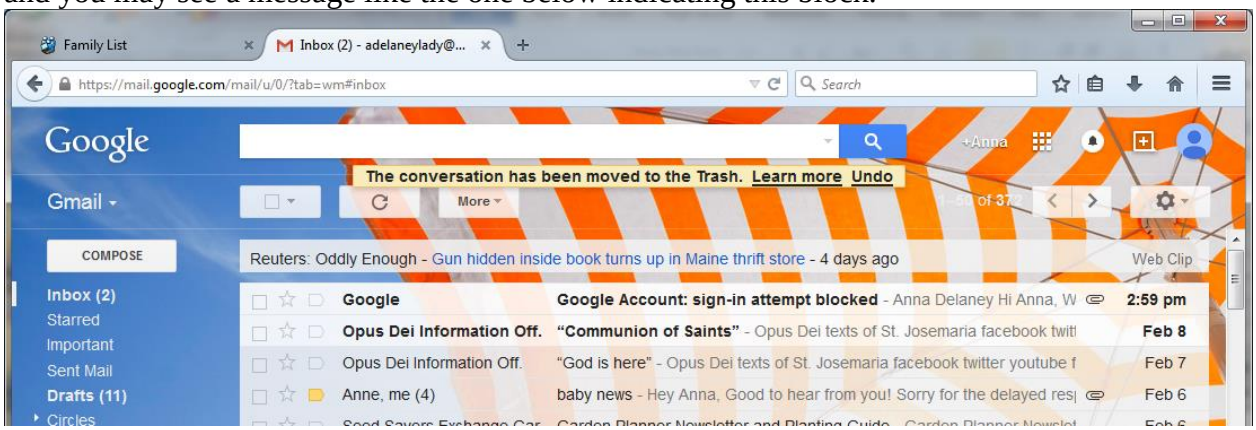


7. After clicking **Send Email Now**, you may get a number of different messages. If you see the message below, you will know, typically, that the password entered in was incorrect.

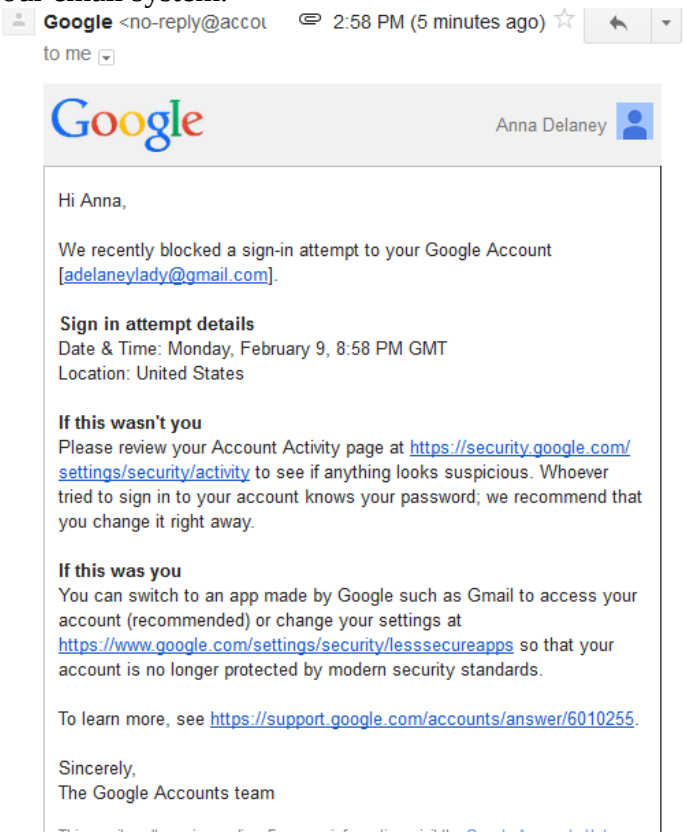


8. Please note, as in the circumstances above some vendors, like Gmail, may have blocked the ability for Connect Now to use the Gmail site. Go to log into your webbased email account,

and you may see a message like the one below indicating this block.



9. In the example above, usually you will see directions for giving ParishSOFT ability to use your email system.



10. After clicking through the settings and changing the security settings for your web-based email, you can re-try and typically the email should go through.

    - Please NOTE: any email you send from ParishSOFT will be exactly how you would send email through your normal email account. Please do not try and send BULK messages through ParishSOFT or they will be caught in spam filters and your email may be also blacklisted.

11. If you have any issues with setting up email, please contact ParishSOFT support toll free at: 866-930-4774 x 2.