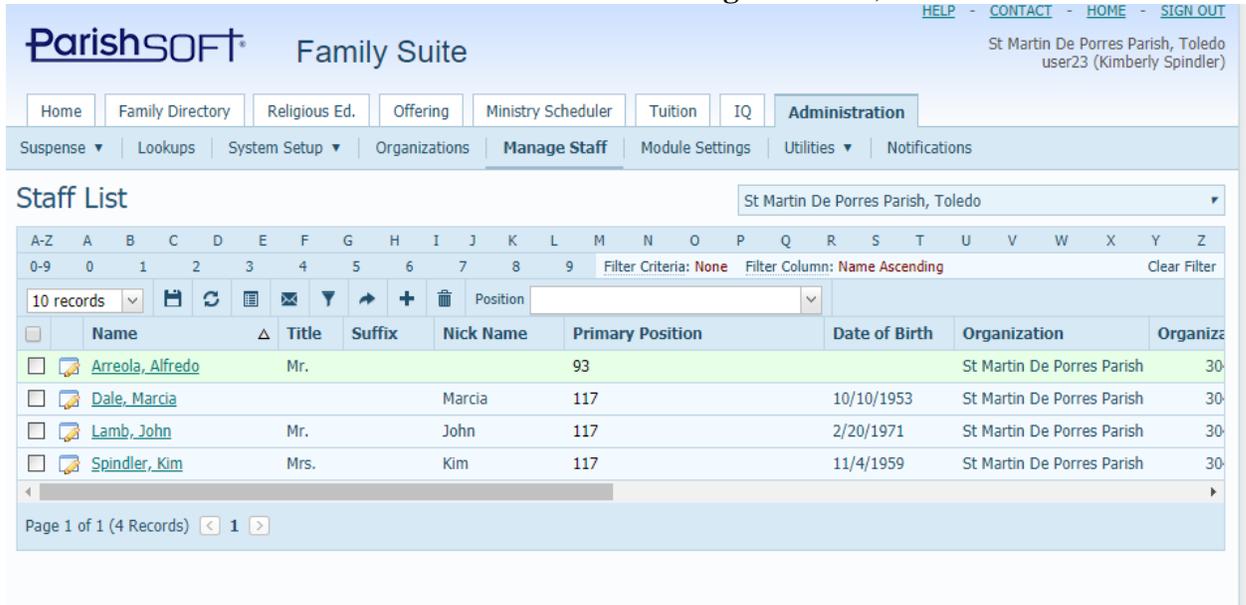


Setting up Email preferences

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.



ParishSOFT Family Suite

St Martin De Porres Parish, Toledo
user23 (Kimberly Spindler)

Home Family Directory Religious Ed. Offering Ministry Scheduler Tuition IQ **Administration**

Suspense Lookups System Setup Organizations **Manage Staff** Module Settings Utilities Notifications

Staff List St Martin De Porres Parish, Toledo

A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Name Ascending Clear Filter

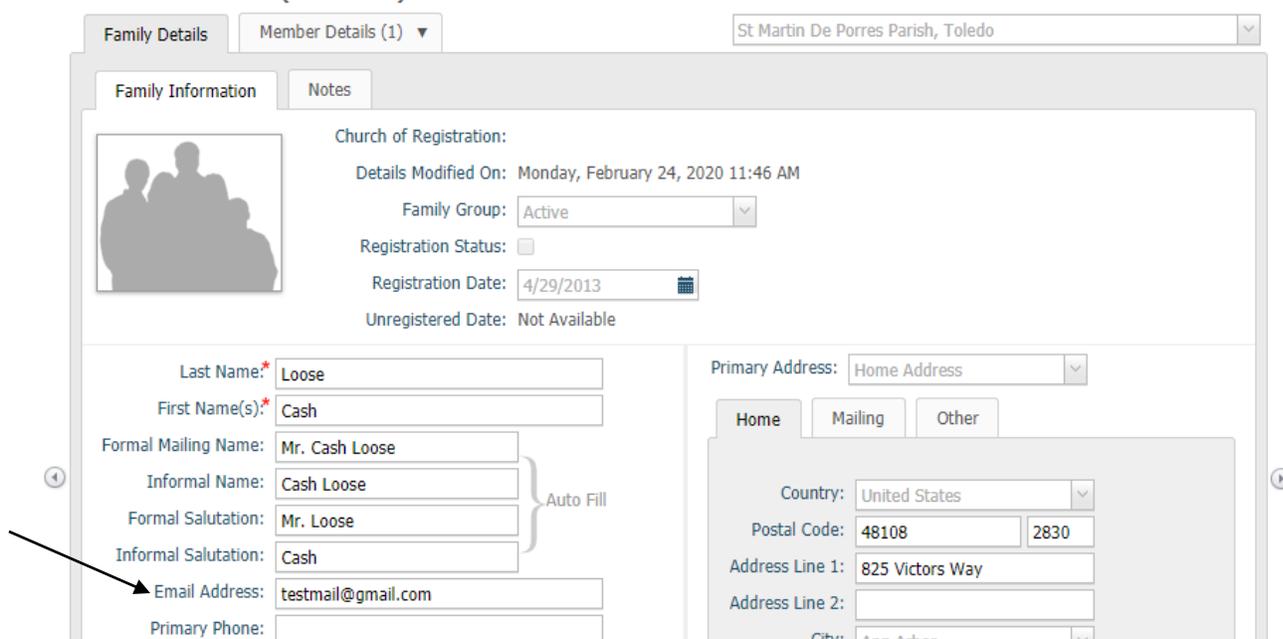
10 records

Name	Title	Suffix	Nick Name	Primary Position	Date of Birth	Organization	Organiza
Arreola, Alfredo	Mr.			93		St Martin De Porres Parish	30
Dale, Marcia			Marcia	117	10/10/1953	St Martin De Porres Parish	30
Lamb, John	Mr.		John	117	2/20/1971	St Martin De Porres Parish	30
Spindler, Kim	Mrs.		Kim	117	11/4/1959	St Martin De Porres Parish	30

Page 1 of 1 (4 Records) 1

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

Mr. Cash Loose (470249)



Family Details Member Details (1) St Martin De Porres Parish, Toledo

Family Information Notes

Church of Registration:

Details Modified On: Monday, February 24, 2020 11:46 AM

Family Group: Active

Registration Status:

Registration Date: 4/29/2013

Unregistered Date: Not Available

Last Name*: Loose

First Name(s)*: Cash

Formal Mailing Name: Mr. Cash Loose

Informal Name: Cash Loose

Formal Salutation: Mr. Loose

Informal Salutation: Cash

Email Address: testmail@gmail.com

Primary Phone:

Primary Address: Home Address

Home Mailing Other

Country: United States

Postal Code: 48108 2830

Address Line 1: 825 Victors Way

Address Line 2:

City: Ann Arbor

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.

ParishSOFT® Family Suite HELP - CONTACT - HOME - SIGN OUT
St Martin De Porres Parish, Toledo
user23 (Kimberly Spindler)

Home **Family Directory** Religious Ed. Offering Ministry Scheduler Tuition IQ Administration

Family List Member List Sacraments Family Workgroups Member Workgroups Group Events Entry Reports

Family List St Martin De Porres Parish, Toledo

▼ loose Clear Search Results

A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Family Ascending Clear Filter

10 records Add New Family Delete Selected Families Forget Selected Family Quick Reports ▼

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Kissner, Loose	9999		555-2222	4100 Harvest Ln	Ann Arbor
<input checked="" type="checkbox"/> Loose, Cash		testmail@gmail.com		825 Victors Way	Ann Arbor
<input type="checkbox"/> Loose, Kathleen			555-2222	- No Address-Text On File -	Ann Arbor
<input type="checkbox"/> Loose, Mary Katherine			555-2222	- No Address-Text On File -	Ann Arbor
<input type="checkbox"/> Offertory Loose Cash, Lynne			555-2222	7052 Johnstown Rd	Ann Arbor

Page 1 of 1 (5 Records) < 1 >

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

ParishSOFT® Family Suite St Martin De Porres Parish, Toledo
user23 (Kimberly Spindler)

Home **Family Directory** Religious Ed. Offering Ministry Scheduler Tuition IQ Administration

Family List Member List Sacraments Family Workgroups Member Workgroups Group Events Entry Reports

Family List St Martin De Porres Parish, Toledo

▼ loose Clear Search Results

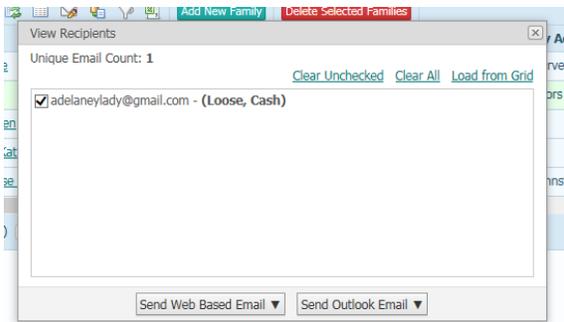
A-Z A B C D E F G H I J K L M N O P Q R S T U V W X Y Z
0-9 0 1 2 3 4 5 6 7 8 9 Filter Criteria: None Filter Column: Clear Filter

10 records Add New Family Delete Selected Families Forget Selected Family Quick Reports ▼

Family	Envelope #	E-Mail Address	Primary Phone	Primary Address	City
<input type="checkbox"/> Kissner, Loose	9999		555-2222	4100 Harvest Ln	Ann Arbor
<input checked="" type="checkbox"/> Loose, Cash		testmail@gmail.com		825 Victors Way	Ann Arbor
<input type="checkbox"/> Loose, Kathleen			555-2222	- No Address-Text On File -	Ann Arbor
<input type="checkbox"/> Loose, Mary Katherine			555-2222	- No Address-Text On File -	Ann Arbor
<input type="checkbox"/> Offertory Loose Cash, Lynne			555-2222	7052 Johnstown Rd	Ann Arbor

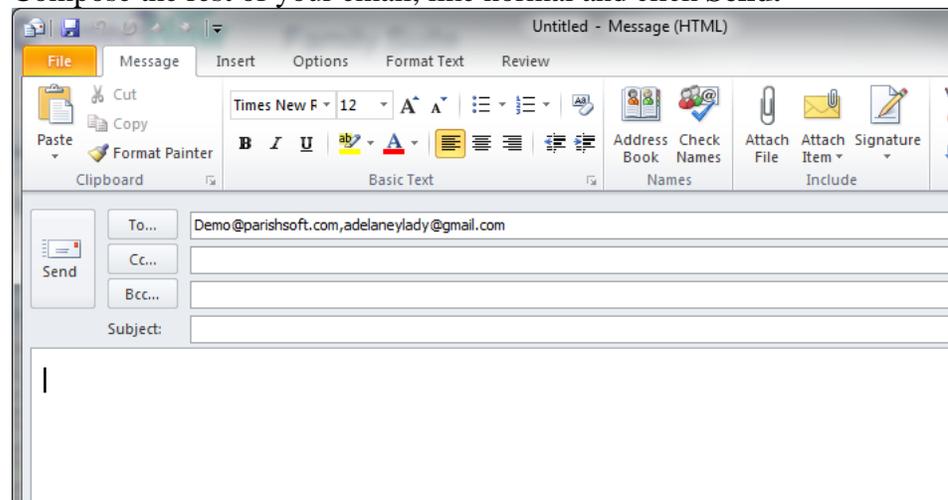
Page 1 of 1 (5 Records) < 1 >

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).

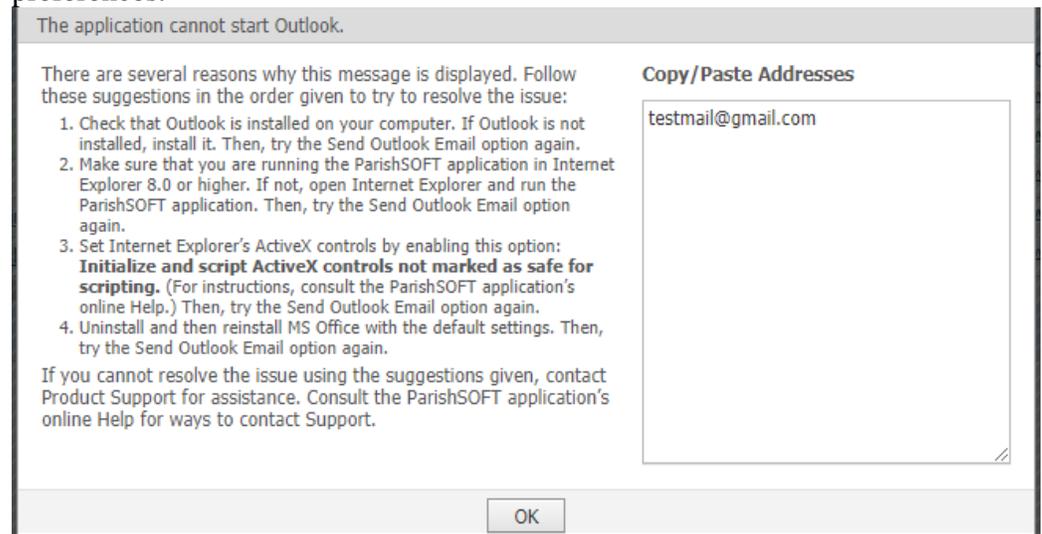


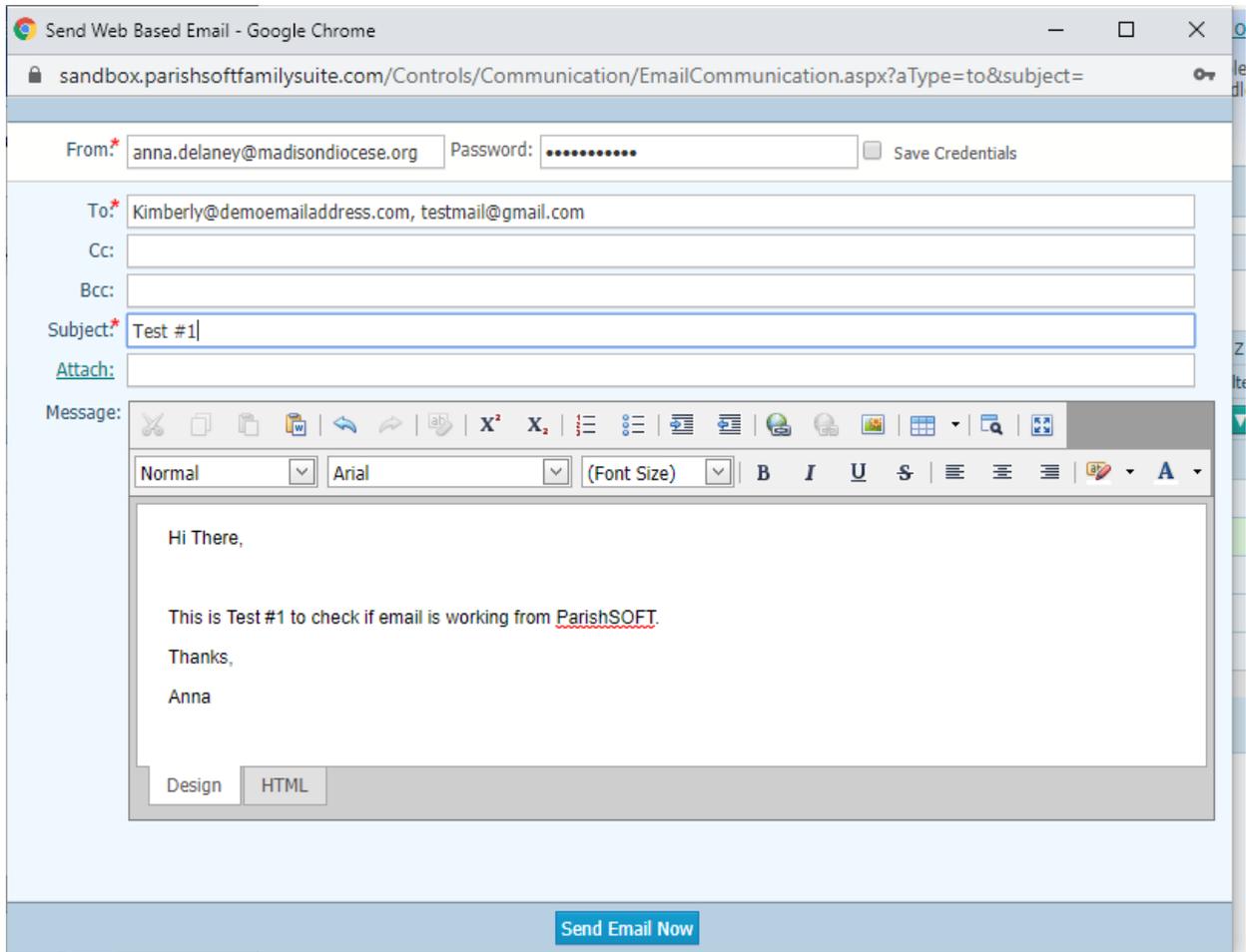
- a. If you click on the **Send Outlook Email** button you will see the screen below which will open up on your computer. If you don't notice it right away, look at your Outlook icon to see if it is flashing with a new message.

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

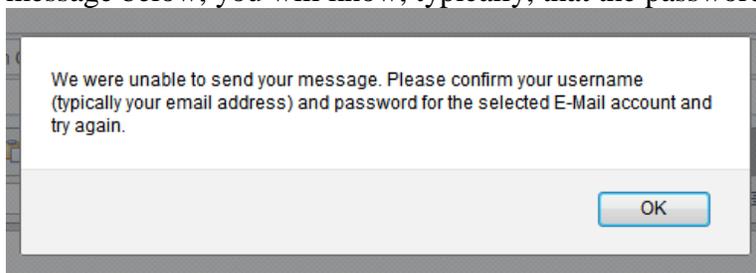


If you do NOT see this message and instead see the one below, contact ParishSOFT support for additional assistance in setting up your email preferences.



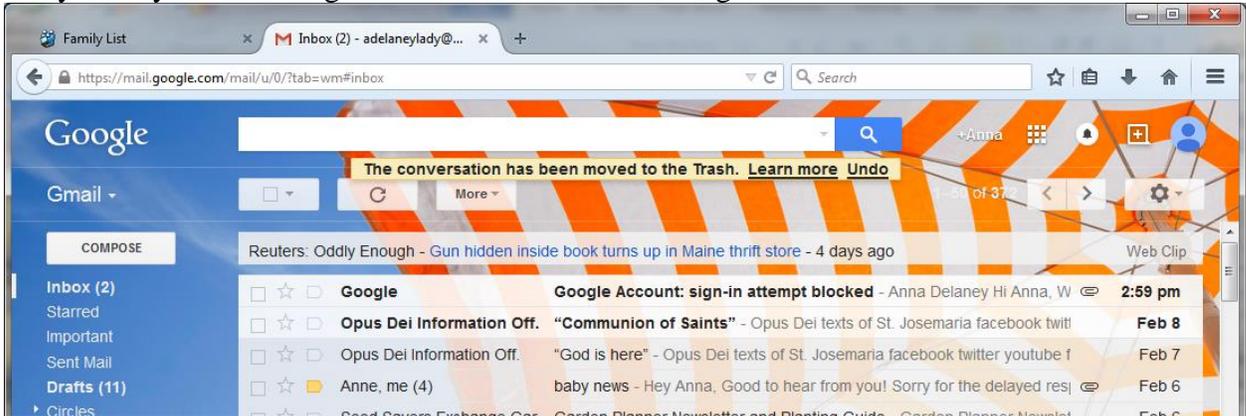


7. After clicking **Send Email Now**, you may get a number of different messages. If you see the message below, you will know, typically, that the password entered in was incorrect.

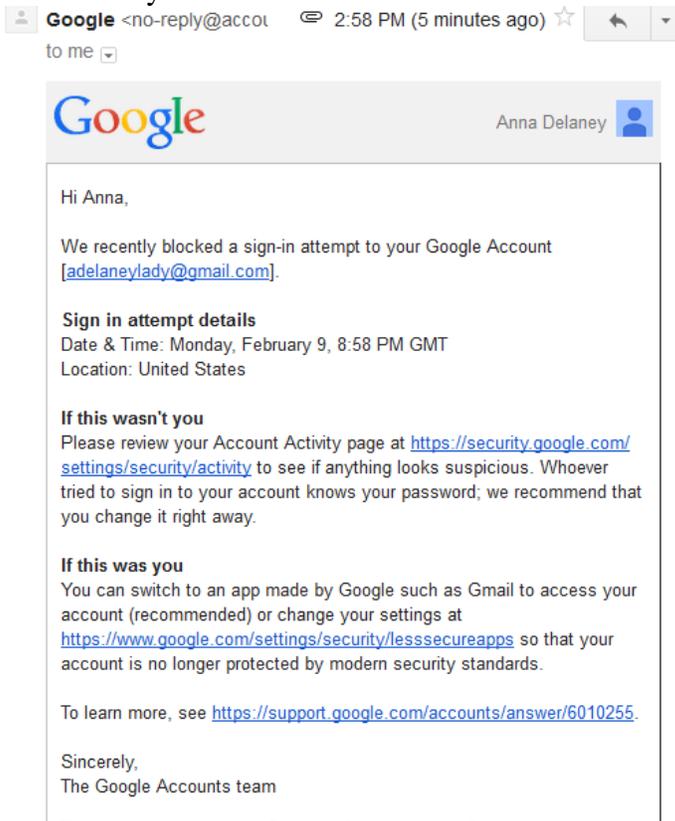


8. Please note, as in the circumstances above some vendors, like Gmail, may have blocked the ability for Connect Now to use the Gmail site. Go to log into your webbased email account,

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.

