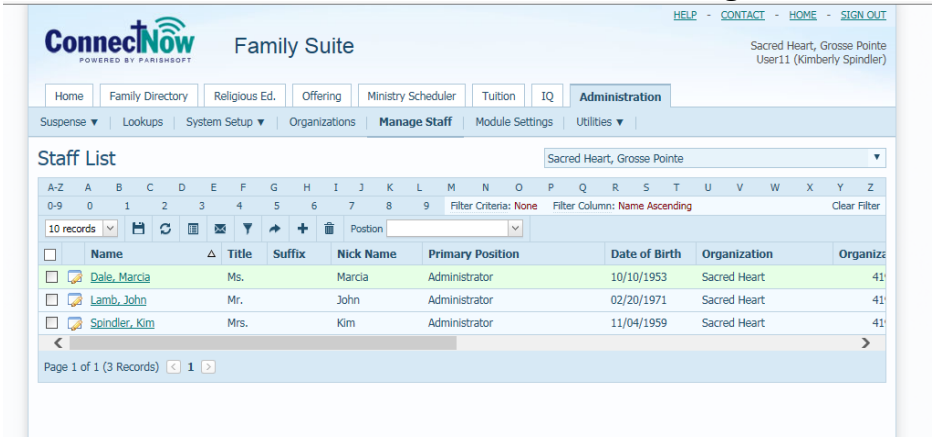
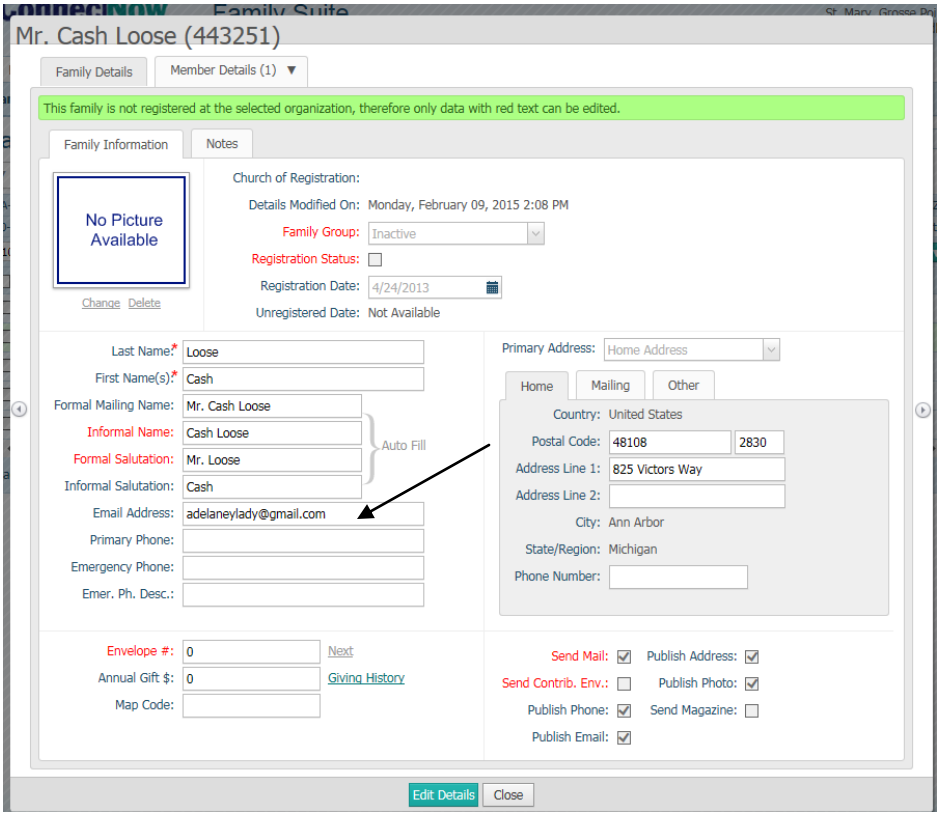
Setting up Email preferences in Connect Now

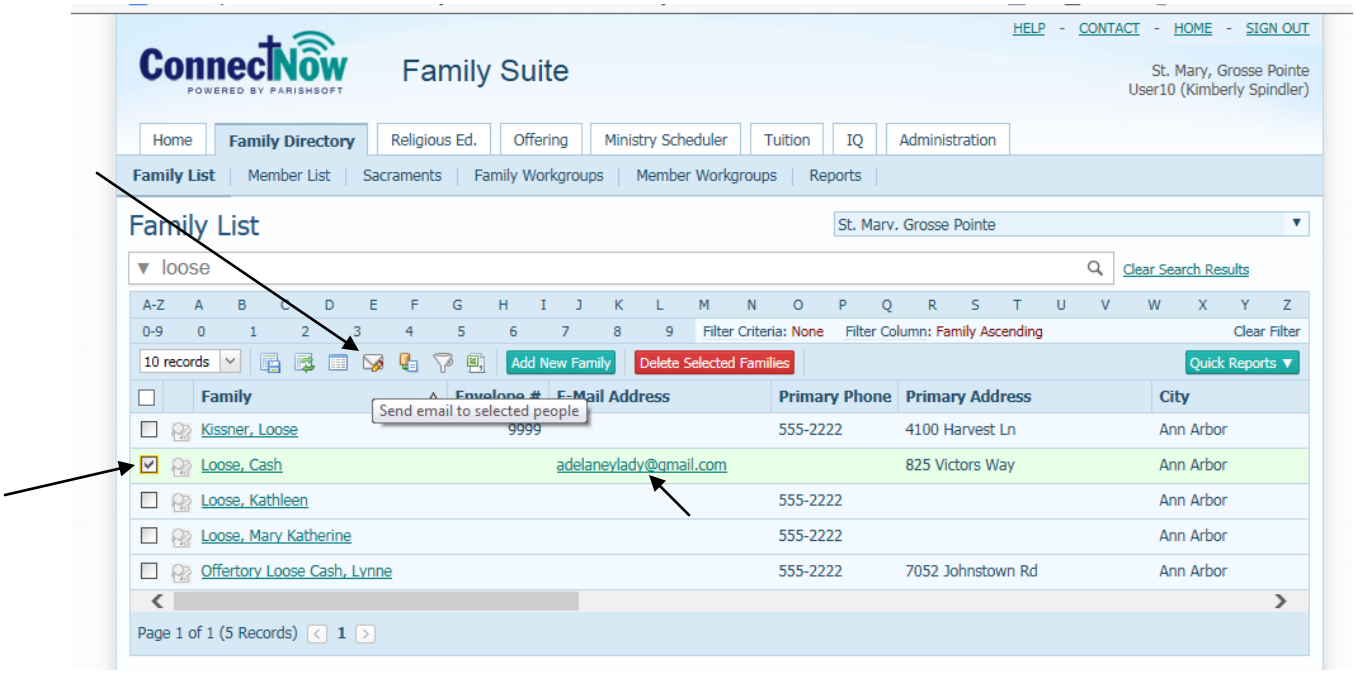
1. You must be an administrator in the Connect Now platform to set up email preferences for other staff members. You should be able to see the tab labeled **Administration** and be able to click on that tab and view staff listed under the **Manage Staff** tab, as seen below.



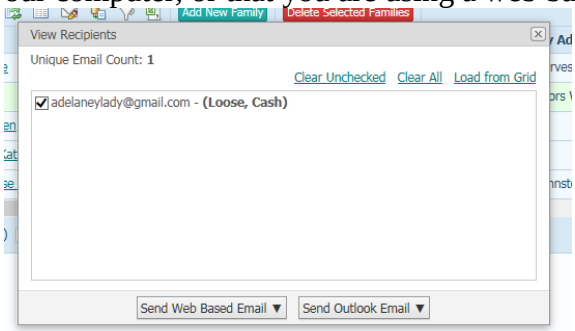
2. First, set up and test your own email prior to setting others up. If you have a generic "Loose Cash" or "Loose Checks" family, please go into your **Family Directory** tab and search for that family to find them. We will add into this user's family email, our own personal email to check that it is received outside of the normal Connect Now screens.



3. Close out of that family and on the main family directory screen we will click on the check mark next to the family, then click on the email icon.

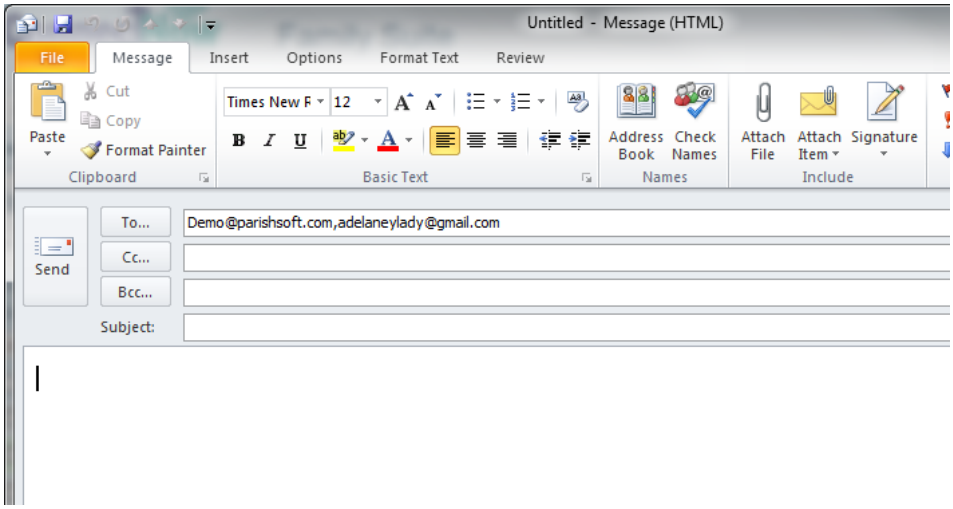


4. We will see the following screen where we need to select whether we have Outlook set up on our computer, or that you are using a web based email.(like Gmail)

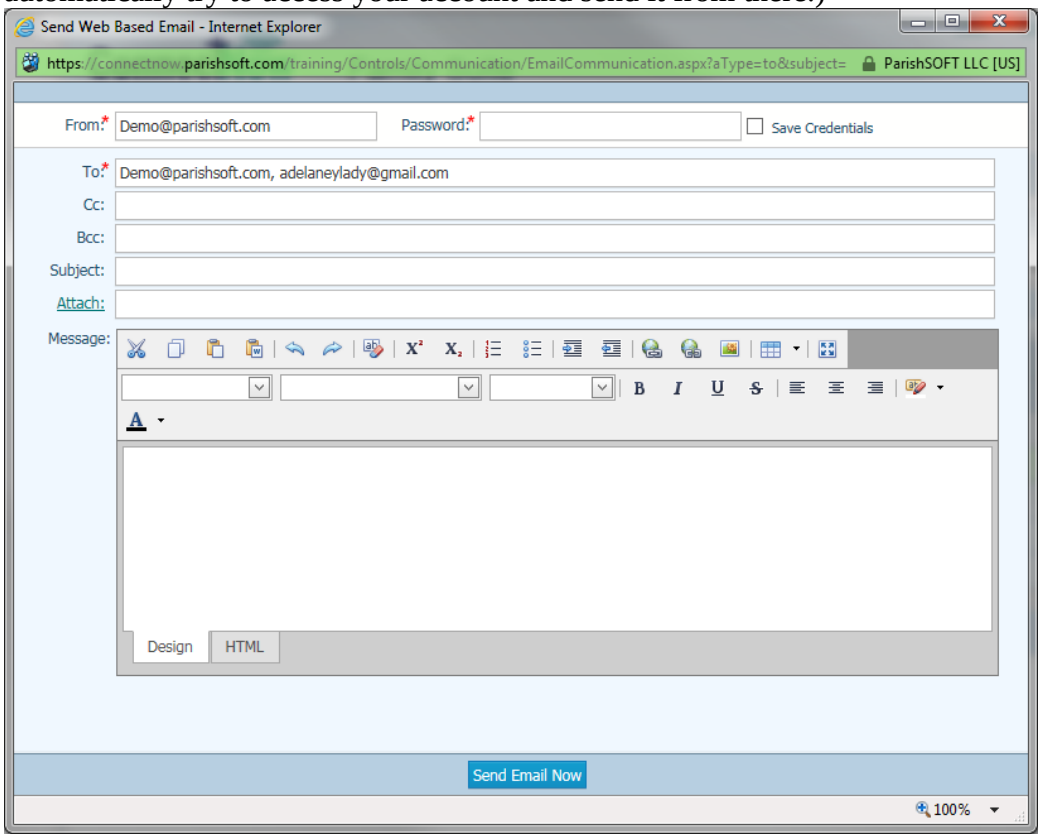


   a. If you click on the **Send Outlook Email** button you will see the screen below which will open up on your computer. If you don't notice it right away, look at your Outlook icon to see if it is flashing with a new message.

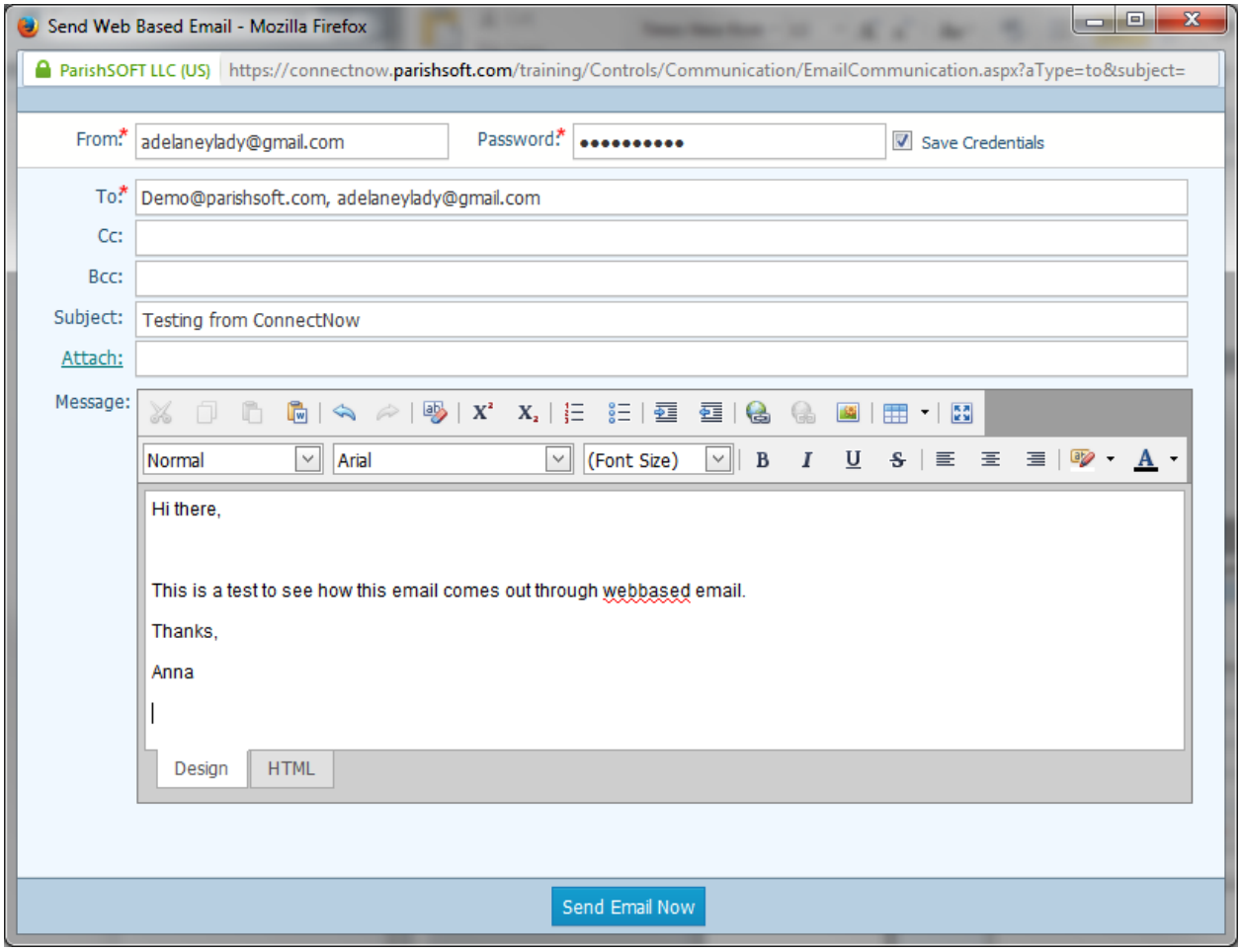
      Compose the rest of your email, like normal and click **Send.**



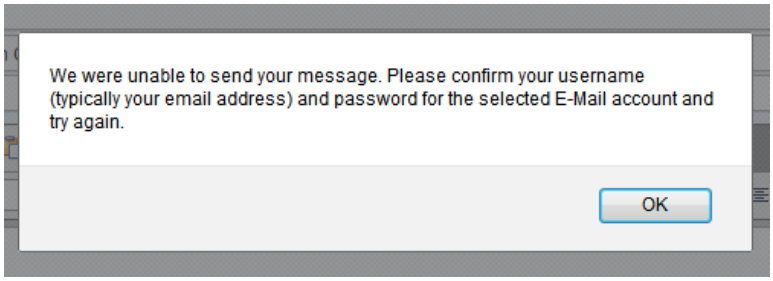
b. If you have clicked the **Send Web Based Email** you will see the following screen shot. (Please note: The **Send Web Based Email** will only work with the major providers like Gmail, Hotmail, AOL, Yahoo, Parishmail, etc. You don't need to know the outgoing settings, it'll automatically try to access your account and send it from there.)



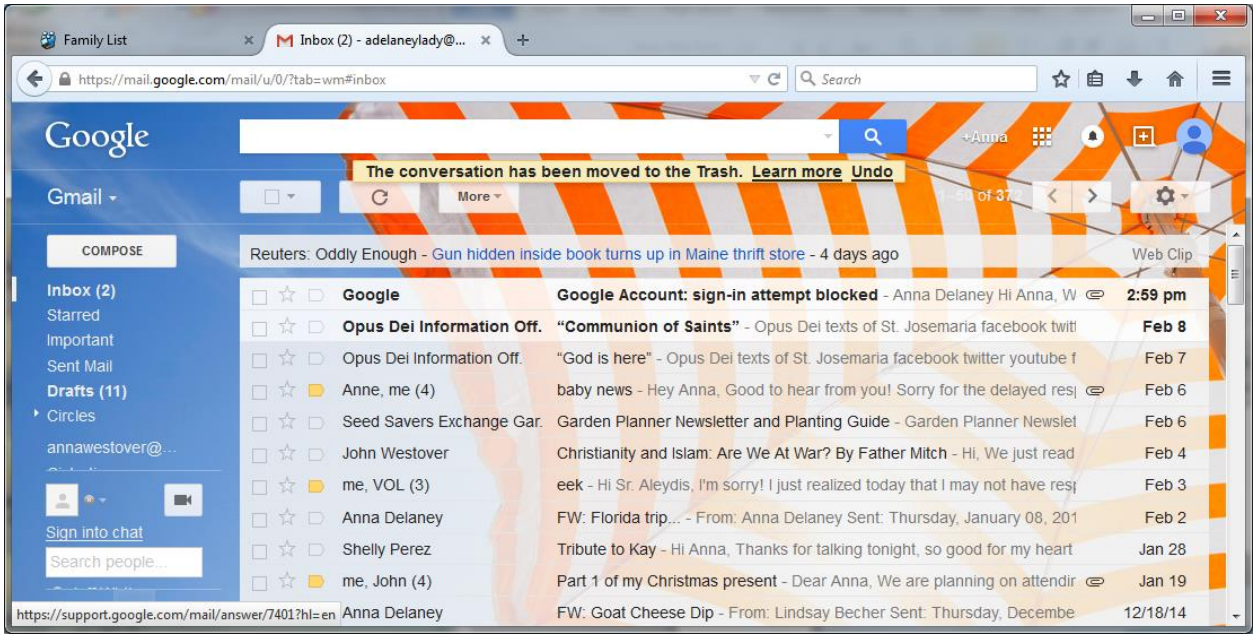
5. From this screen, you will need to verify the "from" email and the password associated with that email. (this is the password you normally type into your email when accessing it through the web)



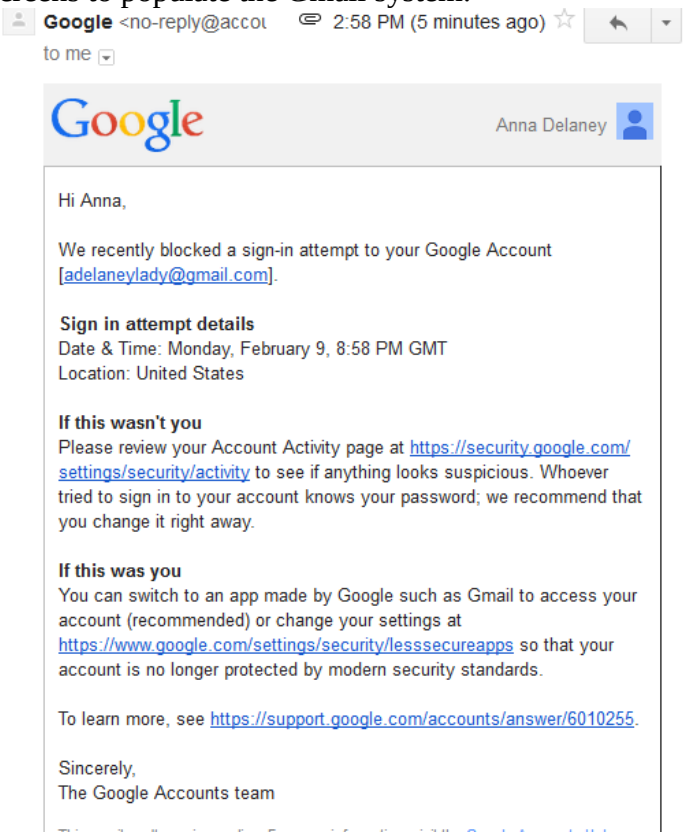
6. After filling in the information about your email settings, including the password, click the **Save Credentials** box and write in some information for a test email and then click **Send Email Now.**



7. If you get the message listed above, please verify your email user name and password and then try again.
8. Please note, as in the circumstances above, Gmail had "blocked" the ability for Connect Now to use the Gmail site. We saw this after logging into the email (Gmail in this case) account entered in above and noticing that the following message was received.



9. After clicking on this email message, Gmail gives us the ability to allow the Connect Now screens to populate the Gmail 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 will go through.
11. If you have any issues with setting up email, please contact ParishSOFT support toll free at: 866-930-4774 x 2.