

# Email

## Introduction

This lesson explains how to set up Sumac and use it to send bulk email. It also explains how to use an HTML editor to create a nicely formatted newsletter.

Before viewing this video, you should view:

Lesson 1: *Sumac Basics for All Users*

Lesson 2: *Communications*

Lesson 3: *Single Contact Record*

Lesson 4: *Contacts List*

Lesson 5: *Finding Contacts*

## Set Up Sumac To Send Email

When Sumac sends email, it does not tell another email program, like Macintosh Mail or Microsoft Outlook, to do the sending. Sumac sends its own email. This means that it needs to be configured for email, just like any other email program.

In particular, you need to tell Sumac about which SMTP server it should use to send email. Sumac stores information about SMTP servers in Office records. In the Administrator menu, choose Offices, **[don't do this]** double click your office (there is probably only one in the list), then fill in the SMTP server and account information. It looks like this...**[click New to create a new entry]**

**[point at SMTP things on the screen]**

Usually you can get most of this information right from account set-up commands in your email program. The only thing you will not be able to get from there is the user password for use on the SMTP server; the password is usually displayed so that it cannot be read.

Almost all SMTP servers use TLS, so only rarely will you need to tell Sumac *Do Not Use TLS*.

Besides specifying SMTP server information, you can specify the default sender of the emails. Enter this information in the Outgoing Email fields: the name of your organization, and the return email address. If necessary, this default name and email address can be changed for any particular batch of emails being sent.

## Send An Email

Now you can send an email to multiple contacts. Choose the contacts to receive the email, then **click the Send Email** button.

Notice the default office is chosen, and information from that office is filled in already.

You must enter a subject line **[enter test subject]**

Usually, when you are sending bulk email, the body of the email comes from a template. A template is usually an HTML file. Sumac does a mail-merge operation on the template for each recipient, creating a customized email message for each one.

For the moment, just to try things out, you can compose a text message by clicking Quick Compose. **[enter test body as the body of the email]**

There are no attachments for the email.

The default settings in the Batch Scheduling area are fine. Before sending bulk email on a regular basis, you must check with your Internet Service Provider to see what restrictions may apply to your account, then enter appropriate values in this area.

Click to send the email. You have the option of saving a communication record for each contact who receives the email. Usually you want to do this, however for this test, don't bother.

Sumac warns you how long it will take to send the emails.

Then it asks where you want to save a status report. Sumac records the status of each email it sends: if it succeeded or if it failed and the reason it failed. For example, a message may not be sent if a contact has no email address, or if a contact has an email address that is the same as someone else in the batch.

The emails are then sent. A progress window opens in the bottom right corner of the screen. You can continue to use Sumac while the email is being sent. However, do not close this window. Closing it causes the sending of emails to stop immediately.

## HTML Email Template

Now that you know how to prepare Sumac for sending emails, and how to send them, consider the content of the email itself.

## Get An HTML Editor

The body of an email can be in one of three formats:

The first possibility is plain text. It is compact and fast, but plain text has no formatting, colour or pictures.

The second choice is a jpg picture. Pictures can be very pretty. The problem is that often

spam filters block messages whose body is just a picture.

The third choice is HTML, usually the best format for the body of an email. HTML is an abbreviation for Hypertext Markup Language. HTML is a document format for data being sent over the Internet, just like *xls* is a format for spreadsheets or *doc* is a format for a word processing document. The HTML format allows links, pictures, tables, different colours and fonts, all in the body of an email.

## HTML Editor – Don't Use Word

Just as you would use a spreadsheet program to edit an *xls* file, you need a specific program to edit an HTML document.

Most word processing programs have the ability to save a document in HTML format. Although it may seem convenient to just use Microsoft Word, *don't do it*. It won't work. Microsoft Word inserts a variety of codes into HTML which are incorrectly interpreted by email programs, including Outlook.

Even copying text from Word and pasting it into an HTML document will probably cause problems. If you need to move text from Word, first save the Word document as a text-only document. Then open the text document (in a text editor, not in Word), copy from the text editor, and paste into your HTML document.

## HTML Editor – Use Sea Monkey HTML Editor

If you do not already have an HTML editor, consider Sea Monkey. This open source program runs on both Macintosh and Windows computers. It creates very standard HTML which works with email programs.

Use your browser to go to [seamonkey-project.org](http://seamonkey-project.org), and download and install Sea Monkey.

Then run Sea Monkey. The first time you run it, edit preferences, choose Appearance, and turn off all the components of Sea Monkey except its Composer, which is the program for creating and editing HTML documents. Then quit.

## Creating the Email

Run Sea Monkey again. This time, it starts up in its Composer and shows a new untitled document. Now construct your newsletter:

Enter some text, just like in a word processor. [**\n\n\nDear , Here is our newsletter \n\n]**

Fill in the salutation field, telling Sumac to insert the recipient's name after Dear. To get the exact text needed, use the Make Template command in the Utilities menu. Choose the virtual letter salutation. Close the window. Paste into the newsletter document.

HTML documents are usually structured using tables. Insert a table and add some content. **put left title and left content, right title and right content into the four cells**

Give the recipient the ability to opt out of the newsletter.

**enter *Click here to be removed from our mailing list.***

**make the word *here* into a link: <mailto:remove@charity.org>**

Now put a header on the newsletter. **Insert a table: two rows, one column, no border; put *Newsletter (centre, bold)* in second row**

Often you want to put an image – your logo – at the top of the page. Any images put into your email must be in files on your web server. They may be in a place that is not linked to your website (perhaps in a special folder named *NewsletterImages*)

For this demo, use the logo at the top of pages in the sumac.com website. Use a browser and go to sumac.com. Right click and copy the image location. Paste the location into your HTML newsletter.

Save the newsletter.

## Test the email in a browser

Most web pages are HTML documents. This means that your browser can open the newsletter document. Open the newsletter in your browser and check that it looks correct.

If it does, close Sea Monkey and the browser.

Now use Sumac to send the email to a test recipient, perhaps yourself. Confirm with the recipient that the mail was received and looked good. **do this**

If all goes well with your testing, then you can send the email message to your whole distribution list.

## Conclusion

In this lesson you learned how to:

- ◆ set up Sumac to enable it to send email
- ◆ send a simple text email
- ◆ install and use an HTML editor
- ◆ create an HTML newsletter with formatting and pictures
- ◆ test the email using a browser and by sending the email

You should now proceed to other Sumac lessons to learn more about how Sumac can help you every day.