

## How do I send email from PastPerfect?

Version 4.0

PastPerfect allows you to send emails to lists of contacts if you have an active account with an SMTP email server. Email through PastPerfect does not work with exchange servers.

### *Email Setup*

If this is your first time sending emails through PastPerfect, you may need to setup your email settings.

1. From the Main Menu, go to Setup | Contacts.
2. Click on the “E-mail” tab.
3. Click “E-mail Setup.”
4. The fields on the right side of the screen need to be filled in. Sometimes you can find this information through your email program (like Outlook). Other times, you may need to contact your Internet Service Provider. They can let you know the Hostname of your SMTP server, the Port Number, and whether or not the SMTP server requires authentication.

**Note:** Leave the default Port Number of “25”, unless your SMTP server uses a non-standard port. Gmail ports are usually 465 and other web-based email programs like Verizon or AOL may use 587.

5. You can also add your email signature from this screen. If you want this signature to appear on all emails you send through the program, please make sure “Include signature at bottom of all e-mails” is checked.
6. Once all the appropriate information is filled in, click “Exit.”

**Note:** If you have PastPerfect security activated, each user will have different email setup information.

### *Sending a Test Email to Check Settings*

1. Find a contact with an email address who wouldn't mind receiving a test email. We recommend adding yourself as a contact and sending the test to yourself.
2. Click “Send e-mail” (to the right of the E-mail field).
3. Enter a Subject. Also enter some text in the body of the email message.
4. Click “Send.”
5. If you receive a message saying the mail was sent successfully, check the recipient email account to make sure the email went through. If you receive an error, please double-check your email settings. An “error sending email” most often means that something in the email settings is incorrect.

### *Preparing the Email*

Once you can send a test email successfully, you can compose an email letter to send to your contacts.

1. From the Main Menu, go to Setup | Contacts.
2. Click on the “E-mail” tab.
3. Click “Add.”
4. Enter a name for this email letter, then click “OK.”
5. With your email letter selected on the left, click “Compose Email.”

6. On the next screen, you can enter the Subject of the email as well as compose the body of it.

**Note:** You have the option to compose your email in Plain Text or HTML. Please choose the format for this email before you begin typing the text of the message. If you compose the email in HTML you must use HTML coding or else your email will likely come out looking like one large block of text.

7. Click “Exit & Save” when you are finished composing the email.
8. We recommend sending a test copy of this email to yourself to make sure the formatting is correct before sending it to a contact list. It is especially important to send a test email if you have created your email in HTML.

### *Sending Email to a Contact List*

After the email letter is set up and you have sent a test to yourself to look over the formatting you can send it to all of the contacts on a particular list who have an email.

1. From the Main Menu, go to Lists & Labels.
2. Select the list you want to use.
  - Two common Boolean statements for lists of people with emails are:
    - i. Contacts with email - !empty(email)
    - ii. Members with email – memno>0 and !empty(email)
3. Click “Continue.”
4. On the next screen, be sure you have what you want selected for these checkboxes at the bottom:
  - Include Contacts with Stopmail (Most organizations will not want this checked)
  - Include Life Members
5. Click “E-mail Letters.”
6. Select your letter from the list. Also be sure to make a selection for “Dear” (either Formal, Casual or None). If you choose Formal or Casual, it will add the person’s name at the top of your email letter automatically. Using None will start the email with the body of the letter instead.
7. Click “Email Letter.”
8. The next screen is a preview of the email. If you want to send an attachment with your email, you can attach the file here using the paperclip button. You can also scroll through the list of people you’re sending to by using the right and left arrows at the bottom left of this screen.
9. Also at the bottom of this screen, there are three options for sending emails:
  - Email this one person – This option sends the email to the contact shown on the screen. Use the arrow buttons to move to the next contact on the list and send the email that contact. Use this option if you want to send the emails one at a time or if you want to personalize each email. You can skip over contacts using this option.
  - Send one email to everyone – This option creates one email with all the recipients in the To: field. If you want to make the recipient list invisible so that contacts cannot see the email addresses the other recipients, check the Blind CC box. This option is often the fastest way to send out emails, but if there is an invalid email address on the list the email will not send to anyone. We suggest using this option for lists of 25 recipients or less when you want to be able to respond to each other.

- Send emails to everyone – This option creates a separate email for each contact on the list. Contacts will not see the recipient list in the To: field of the email. This option may take longer to send emails, but if there is an invalid email address on the list, you will be able to skip over it and continue sending to the rest of the list. This is the suggested method for sending emails to groups.

Another thing to keep in mind about using email through PastPerfect – sometimes, your Internet Service Provider (ISP) will have limits on the number of emails that can be sent during a specific time period (per hour, per day, etc.). These measures exist to help prevent spamming. We recommend contacting your ISP to ask about these limits. If there are limits and you're emailing a large number, you may need to break your list down into smaller groups to spread out the emails being sent.

If you have any questions, please contact our Support Office at 1-800-562-6080 or email [support@museumsoftware.com](mailto:support@museumsoftware.com). Thank you for using PastPerfect!