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Special Mailings

The ACS Special Mailings module is designed to complement the People module by including individuals who are not members or prospective members of the church, but who are individuals with whom you still want to communicate. For example, you may want to mail your newsletter to area pastors or other churches in your denomination or invite music lovers in the community to special concerts.

With Special Mailings, you can:

- Maintain an unlimited number of mailing lists with an unlimited number of individuals or groups on the list.
- Add or delete mailing list records at any time
- Enter an individual or organization's record once and include them in multiple mailing groups
- CASS certify addresses for postal bulk mail discounts. Special Mailings supports delivery point bar coding, ZIP + 4, line of travel and carrier route coding.

Special Mailings Startup Outline

To get started with the Special Mailings module, perform the following tasks:

1. [Add mailing groups.](#)
2. [Add individuals.](#)
3. [Add organizations.](#)

Individuals and Organizations in Special Mailings

Individuals and organizations are entered in the Special Mailings module instead of the People module. This is done in order to separate members and prospective members from people to whom you only send occasional mailings.

For example, you may want to send your newsletter to area pastors and other religious leaders. By entering these people in Special Mailings, you can accomplish this without including them in other mailings, or when analyzing membership data.

You can add an unlimited number of individuals and organizations to Special Mailings. Also, an individual or organization can be in an unlimited number of Mailing Groups.

Working with Individuals and Organizations in Special Mailings

The ACS Special Mailings module gives you multiple options for working with mailing groups. You can enter an unlimited number of people or organizations in Special Mailings, then add them to Mailing Groups.

To add an individual

1. Under **Manage Records**, click the **People** tab.
2. Select **Add/Edit Special Mailings** from the drop-down list, and click **Go** .
3. Click **Add**.
4. Enter the **Last Name**.
5. Enter additional name information as necessary.
6. Under **Active Address**, enter the organization's mailing address. If the address is a business address, select **Company** and enter the Company name. This adds an additional line to the mailing label.
7. Under **Groups**, select the mailing groups for which the organization is a member.
8. Enter **Additional Information** as necessary.
9. Click **OK**.

To add an organization

1. Under **Manage Records**, click the **People** tab.
2. Select **Add/Edit Special Mailings** from the drop-down list, and click **Go** .
3. Click **Add**.
4. Enter the organization name in the **Last Name** field.
5. Under **Active Address**, enter the organization's mailing address. If the address is a business address, select **Company** and enter the Company name. This adds an additional line to the mailing label.
6. Under **Groups**, select the mailing groups for which the organization is a member.
7. Enter **Additional Information** as necessary.
8. Click **OK**.

To add a record to a mailing group

1. Under **Manage Records**, click the **People** tab.
2. Select **Add/Edit Special Mailings** from the drop-down list, and click **Go** .
3. Select the individual or organization you want to add to a mailing group, and click **View/Edit**.
4. Click the **Groups** tab.
5. Under **Available Groups**, select the mailing groups to which you want to add the individual.
6. Click **OK**.
7. Click **Close**.

To edit an individual record

1. Under **Manage Records**, click the **People** tab.
2. Select **Add/Edit Special Mailings** from the drop-down list, and click **Go**  .
3. Select the individual whose information you want to edit, and click **View/Edit**.
4. Click **Edit**.
5. Edit information on the **Profile**, **Notes**, and **Groups** tabs as necessary.
6. Click **OK**.
7. Click **Close**.

To delete an individual record

1. Under **Manage Records**, click the **People** tab.
2. Select **Add/Edit Special Mailings** from the drop-down list, and click **Go**  .
3. Select the individual you want to delete.
4. Click **Delete**.
5. A confirmation message displays. Click **Yes**.

Working with Titles and Suffixes in Special Mailings

The ACS Special Mailings module gives you multiple options for working with titles and suffixes, and you can add as many titles and suffixes as your organization needs. The titles and suffixes are added in Define Lists in order to maintain consistency.

When you edit a title or suffix, all the records that use it are updated automatically. When you delete a title or suffix, it is deleted from any records that are using it.

To add a title

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Title**.
4. Click **Add**.
5. In the **Field Description** data field, enter the title.
6. Click **OK**.

To edit a title

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Title**.
4. Under **Title**, select the title you want to edit.
5. Click **Edit**.
6. In the **Field Description** data field, edit the title.
7. Click **OK**.

To delete a title

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Title**.
4. Under **Title**, select the title you want to delete.
5. Click **Delete**.
6. A confirmation message displays. Click **Yes**.

To add a suffix

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Suffix**.
4. Click **Add**.

5. In the **Field Description** data field, enter the suffix.
6. Click **OK**.

To edit a suffix

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Suffix**.
4. Under **Suffix**, select the suffix you want to edit.
5. Click **Edit**.
6. In the **Field Description** data field, edit the suffix.
7. Click **OK**.

To delete a suffix

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Suffix**.
4. Under **Suffix**, select the suffix you want to delete.
5. Click **Delete**.
6. A confirmation message displays. Click **Yes**.

Working with Mailing Groups

Mailing groups are used to sort the individuals or organizations you have entered in Special Mailings. For example, you may want to send out your newsletter to one group of people while sending concert invitations to another group.

With the Special Mailings module, you can create as many groups as you need, and each group can have an unlimited number of members. Each individual or organization you enter into Special Mailings can be in more than one group.

Your first step in preparing to enter Special Mailings information is deciding which groups to set up. The information you store in these groups is not a part of the People module. Although records from the People module can be added to the Special Mailings module, these groups are used primarily for mailings such as those to other churches, media outlets, and educators in your area as well as to individuals not in the People module.

Adding and Moving Mailing Group Records

The ACS Special Mailings module gives you multiple options for working with mailing groups.

You can add, copy, or move individuals and organizations from one group to another either individually or en masse.

To add a group of records to a Mailing Group

1. Under **Manage Records**, click the **Groups** tab.
2. Select **Special Mailings Add/Edit Groups** from the drop-down list, and click **Go** .
3. In the **Filter Group** list, select the mailing group to which you want to add individuals, and click **Add to Group**.
4. In the **Available** list, select the name of the individual or organization you want to add to the mailing group
5. Click **Add** .
6. After you have added everyone you want to add, click **OK**.

Useful Information

To move everyone to the Mailing Group in one step, click **Add All** .

To copy selected records from one group to another

1. Under **Manage Records**, click the **Groups** tab.
2. Select **Special Mailings Add/Edit Groups** from the drop-down list, and click **Go** .
3. In the **Filter Group** drop-down list, select the mailing group from which you want to copy.
4. Select the records you want to copy to another mailing group. To select more than one record, press the **CTRL** key while clicking the names in the grid. To select a group of continuous records, press the **Shift** key while clicking the names in the grid.
5. Click **Copy**.
6. In the **Copy to Group** list, select the mailing group to which you want to copy the records.
7. Select **Copy Selected**.
8. Click **OK**.

To copy all records from one group to another

1. Under **Manage Records**, click the **Groups** tab.
2. Select **Special Mailings Add/Edit Groups** from the drop-down list, and click **Go** .
3. In the **Filter Group** drop-down list, select the mailing group from which you want to copy.
4. Click **Copy**.

5. In the **Copy to Group** list, select the mailing group to which you want copy the records.
6. Select **Copy All**.
7. Click **OK**.

To move selected records from one group to another

1. Under **Manage Records**, click the **Groups** tab.
2. Select **Special Mailings Add/Edit Groups** from the drop-down list, and click **Go** .
3. In the **Filter Group** drop-down list, select the mailing group from which you want to move all records.
4. Select the records you want to move to another mailing group. To select more than one record, press the **Ctrl** key while clicking the names in the grid. To select a group of continuous records, press the **Shift** key while clicking the names in the grid.
5. Click **Move**.
6. In the **Copy to Group** list, select the mailing group to which you want move the records.
7. Select **Copy Selected**.
8. Click **OK**.

To move all individuals from one group to another

1. Under **Manage Records**, click the **Groups** tab.
2. Select **Special Mailings Add/Edit Groups** from the drop-down list, and click **Go** .
3. In the **Filter Group** drop-down list, select the mailing group from which you want to move all records.
4. Click **Move**.
5. In the **Copy to Group** list, select the mailing group to which you want to move the records.
6. Select **Copy All**.
7. Click **OK**.

To delete all records from a mailing group

1. Under **Manage Records**, click the **Groups** tab.
2. Select **Special Mailings Add/Edit Groups** from the drop-down list, and click **Go** .
3. In the **Filter Group** list, select the group from which you want to delete all individuals and organizations.
4. Click **Delete Group**.
5. Click **Yes** in the confirmation box.

Setting Up Mailing Groups

The ACS Special Mailings module turns adding, renaming, and deleting your mailing groups into simple yet effective administrative tasks.

To add a mailing group

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Groups**.
4. Click **Add**.
5. In the **Field Description** data field, enter the name of the mailing group.
6. Click **OK**.

To rename a mailing group

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Groups**.
4. Under **Groups**, select the mailing group you want to rename.
5. Click **Edit**.
6. In the **Field Description** data field, enter the new mailing group name.
7. Click **OK**.

To delete a mailing group

1. Under **Advanced Tools**, click the **Define Lists** tab.
2. Select **Special Mailings** from the drop-down list, and click **Go** .
3. Under **Special Mailings**, select **Groups**.
4. Under **Groups**, select the mailing group you want to delete.
5. Click **Delete**.
6. A confirmation message displays. Click **Yes**.

Advanced Special Mailings Procedures

Advanced Special Mailings procedures include locating your SMTP address and authenticating e-mail senders.

Authenticating Email Senders

The Authenticate option verifies the email address you are using is recognized as being valid by your server. Using this option decreases the possibility that a firewall or other security settings block an email.

To authenticate the email sender, you must enter a valid email address and password on the E-mail Report window Configuration tab.

Locating Your SMTP Address

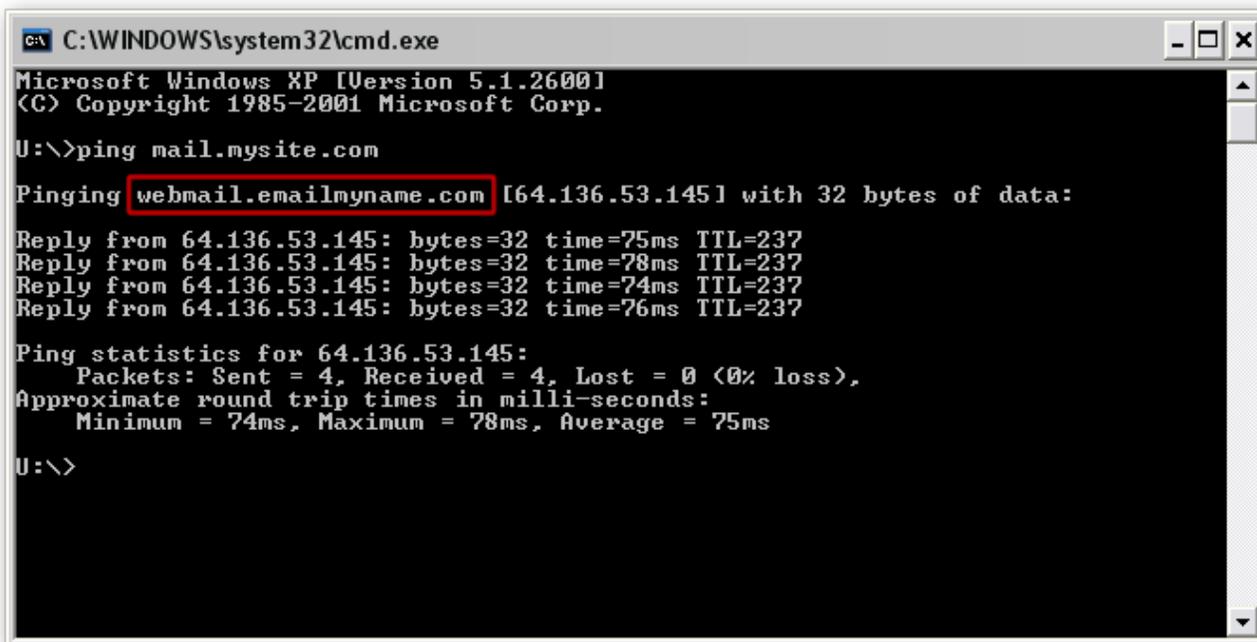
You must know your SMTP server address to configure ACS to send e-mails. An SMTP address displays in one of the following formats:

- As a series of numbers, such as 213.109.213.098
- As a descriptive location, such as microsoft.mailserver.com

To determine your SMTP address (Windows XP)

1. On your computer, click **Start > Run**.
2. In the Run field, type **command**.
3. Press **Enter**. The Windows Command Prompt application opens.
4. In Command Prompt, type **ping smtp.mysite.com**.
 - If this returns an error, type **ping mail.mysite.com** instead.

Your SMTP address is listed directly after the word "Pinging." See an example below. Once you have determined your SMTP address, you can return to [configuring ACS to send e-mails](#). If you have trouble determining your SMTP address, contact your Internet service provider.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.

U:\>ping mail.mysite.com

Pinging webmail.emailmyname.com [64.136.53.145] with 32 bytes of data:

Reply from 64.136.53.145: bytes=32 time=75ms TTL=237
Reply from 64.136.53.145: bytes=32 time=78ms TTL=237
Reply from 64.136.53.145: bytes=32 time=74ms TTL=237
Reply from 64.136.53.145: bytes=32 time=76ms TTL=237

Ping statistics for 64.136.53.145:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 74ms, Maximum = 78ms, Average = 75ms

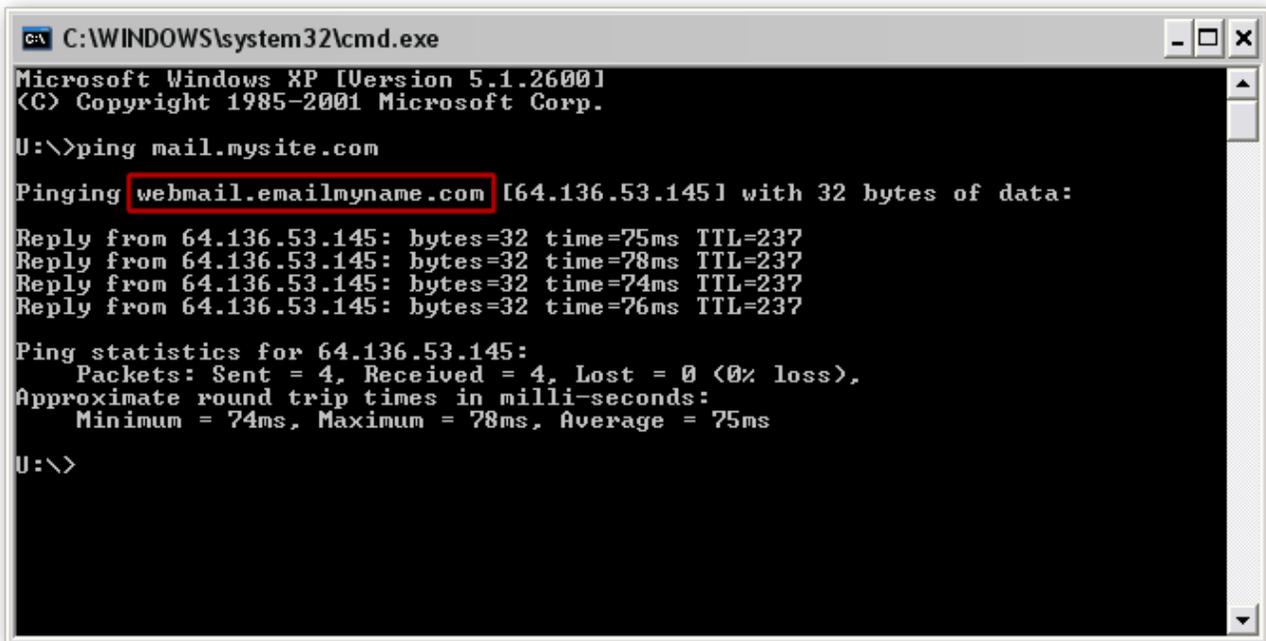
U:\>
```

To determine your SMTP address (Windows Vista or 7)

1. On your computer, click **Start**.
2. In the Search field, type **command**.
3. Press **Enter**. The Windows Command Prompt application opens.

4. In Command Prompt, type **ping smtp.mysite.com**.
 - If this returns an error, type **ping mail.mysite.com** instead.

Your SMTP address is listed directly after the word "Pinging." See an example below. Once you have determined your SMTP address, you can return to [configuring ACS to send e-mails](#). If you have trouble determining your SMTP address, contact your Internet service provider.



```
C:\WINDOWS\system32\cmd.exe
Microsoft Windows XP [Version 5.1.2600]
(C) Copyright 1985-2001 Microsoft Corp.
U:\>ping mail.mysite.com
Pinging webmail.emailmyname.com [64.136.53.145] with 32 bytes of data:
Reply from 64.136.53.145: bytes=32 time=75ms TTL=237
Reply from 64.136.53.145: bytes=32 time=78ms TTL=237
Reply from 64.136.53.145: bytes=32 time=74ms TTL=237
Reply from 64.136.53.145: bytes=32 time=76ms TTL=237
Ping statistics for 64.136.53.145:
    Packets: Sent = 4, Received = 4, Lost = 0 (0% loss),
    Approximate round trip times in milli-seconds:
        Minimum = 74ms, Maximum = 78ms, Average = 75ms
U:\>
```

Special Mailings Reports

The Special Mailings module has several reports that you can print, preview, or export. Special Mailings Reports contain information on mailing lists and labels. Some Special Mailings Reports interface with other modules in the People Suite. There are many options available for each report type.

Many different reports are available, and each report is highly customizable. Because there are so many options available for reports, you can print each report in a variety of ways. We recommend that you experiment with each report, and examine the options available for each one.

The following report types are available in the Special Mailings module:

Labels

Label reports provide you a way to print personal information about people in your organization in a wearable format. The labels available in labels reports include Special Mailing 1-Up Labels, which prints names and addresses in a 1-Up, or single-column per page, label format; and Special Mailing 3-Up Labels, which prints names and addresses in a 3-Up, or 3 columns per page, label format.

| Report | Description |
|------------------------------|--|
| Special Mailings 1-Up Labels | Creates a list of names and addresses for individuals in the selected mailing group or groups. Labels display in a single column and there are 12 per page. |
| Special Mailings 3-Up Labels | Creates a list of names and addresses for individuals in the selected mailing group or groups. Several formatting and report options are available. Labels display three across and there are 30 per page. |

Extracts

Use extract reports to export ACS data in various formats, including [PhoneTree Export](#), which creates an export of your Special Mailings data that can be imported into PhoneTree.

| Report | Description |
|------------------|---|
| PhoneTree Export | Creates an export titled PhoneTree.pbf for selected special mailings. You can send this file to PhoneTree – a voice message delivery system that calls each individual to deliver a personalized message that you record. |

Lists

Lists reports print a variety of lists from the Special Mailings Reports window, including a Listing of Mailing Groups, which includes a list of all mailing groups in Special Mailings. The basic report includes name, address, email address, and home phone number. The Special Mailing Master Listing prints a list of names, addresses, email addresses, phone numbers, and the mailing group the organization belongs to. You can print unlisted phone numbers and email addresses by selecting the Include Unlisted Phone option.

| Report | Description |
|--------------------------------|--|
| Listing of Mailing Groups | Creates a list of mailing groups and the name, address, and phone number for each individual or organization in the group. |
| Special Mailing Master Listing | Creates a list of Special Mailings individuals and groups that includes the name, address, phone number, and the mailing groups each belongs to. |