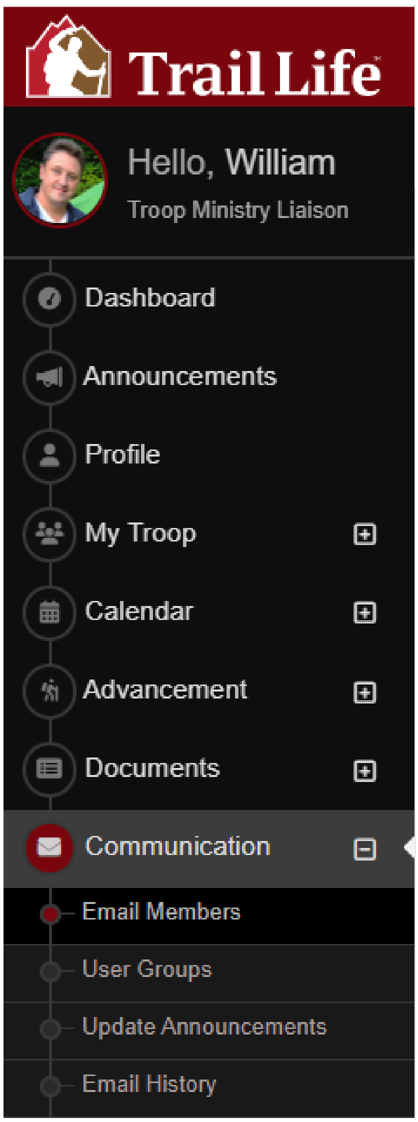
Email

This document will show how to use the Email tool for communicating within Trail Life Connect. Most views shown will be from the perspective of the Troop Ministry Liaison.

Sending Emails in Trail Life Connect

As long as your adult leader role has been assigned the appropriate permission, you can send email messages to other members of your Troop (or Area/Region for leaders in those spaces) using the link titled "Email Members" under "Communication" on the left navigation menu of Trail Life Connect.



Email User Groups

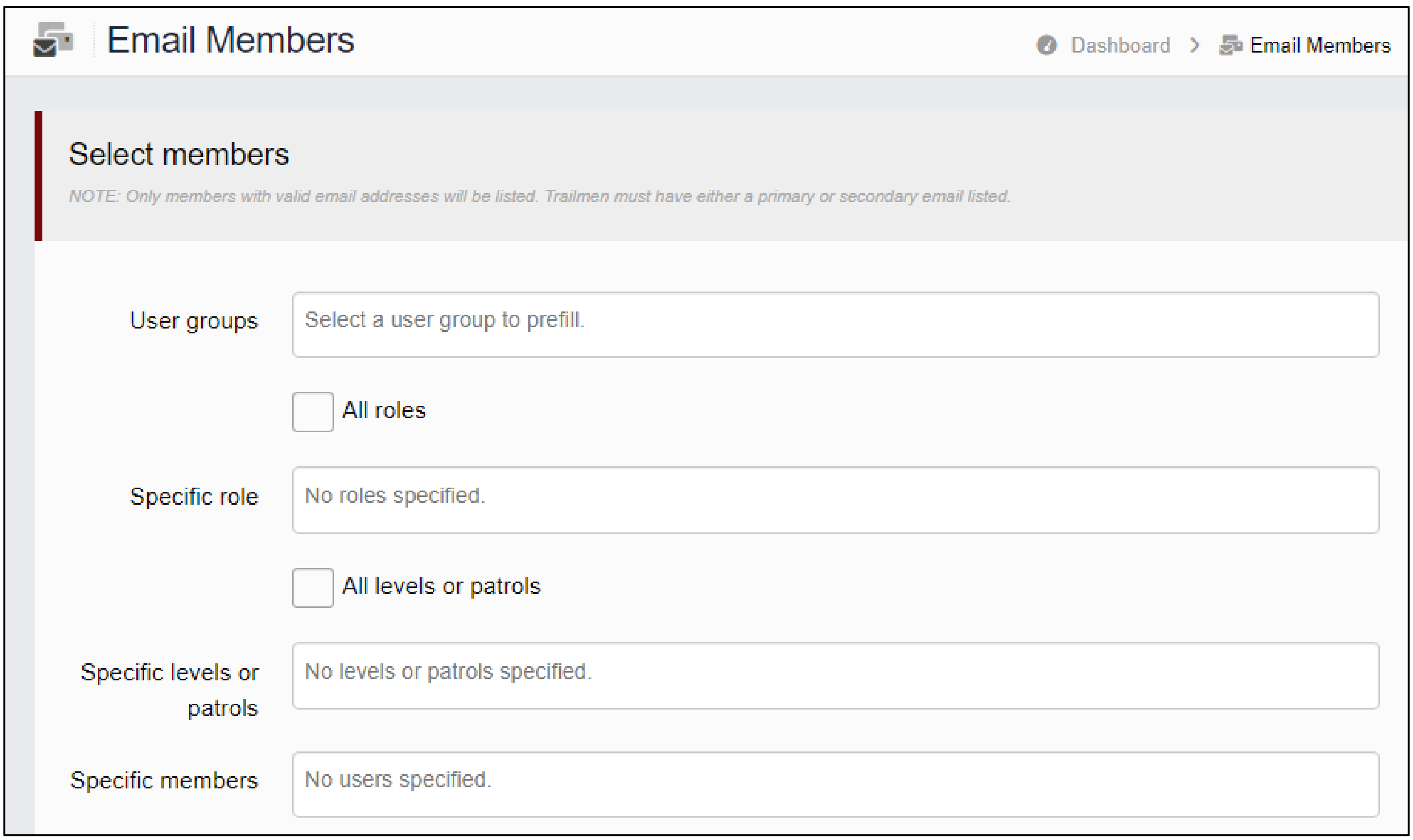
Leaders with email permissions in Trail Life Connect also have the ability to create their own custom User Groups for sending email communications. These can be helpful if the existing email selections for Roles, Levels, or Patrols do not fully encompass the intended audience. A few possible group use cases could be: (l) a group for the Troop Committee, which includes all adult leaders who are part of regular committee meetings and decisions; (2) a custom Group that includes leaders who will be participating in an upcoming Summer Adventure; etc.

*We will cover the creation of User Groups in a later section.

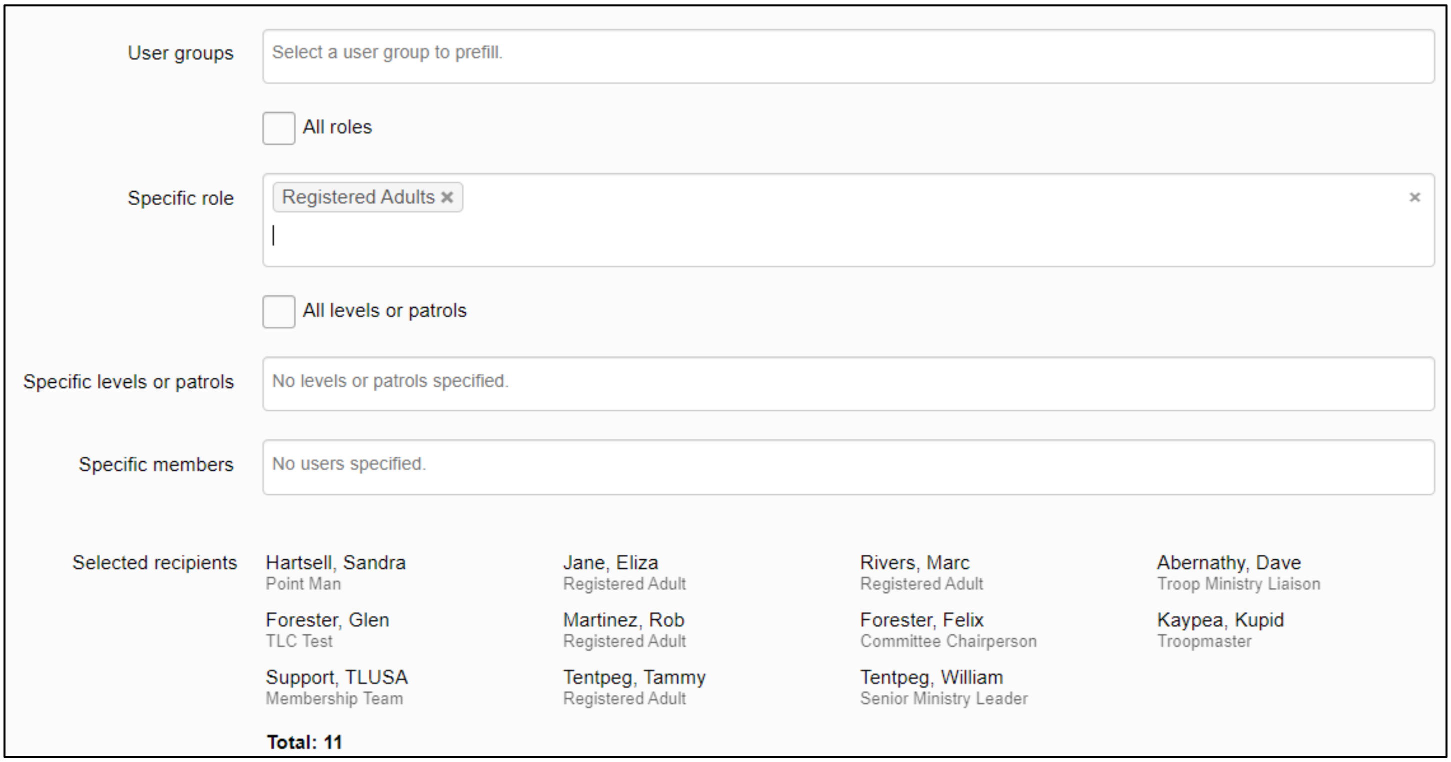
Select Members to Email

On the *Email Members* page, the first section allows you to specify to whom you will be sending the email message. In a Troop, you will note that you can choose to send a message based on:

- User Groups
- Specific role (adult or youth)
- Specific levels or patrols (primarily youth, unless your Troop also utilizes patrols for adults)
- Specific members *(Tip: hold the* Ctrl *key when selecting multiple member names for easier navigation)*



Upon making a particular selection using one of the provided categories, you will see the "Selected Recipients" section populate to show you the specific names of those who will receive your message.


User groups: Select a user group to prefill.

All roles

Specific role: Registered Adults

All levels or patrols

Specific levels or patrols: No levels or patrols specified.

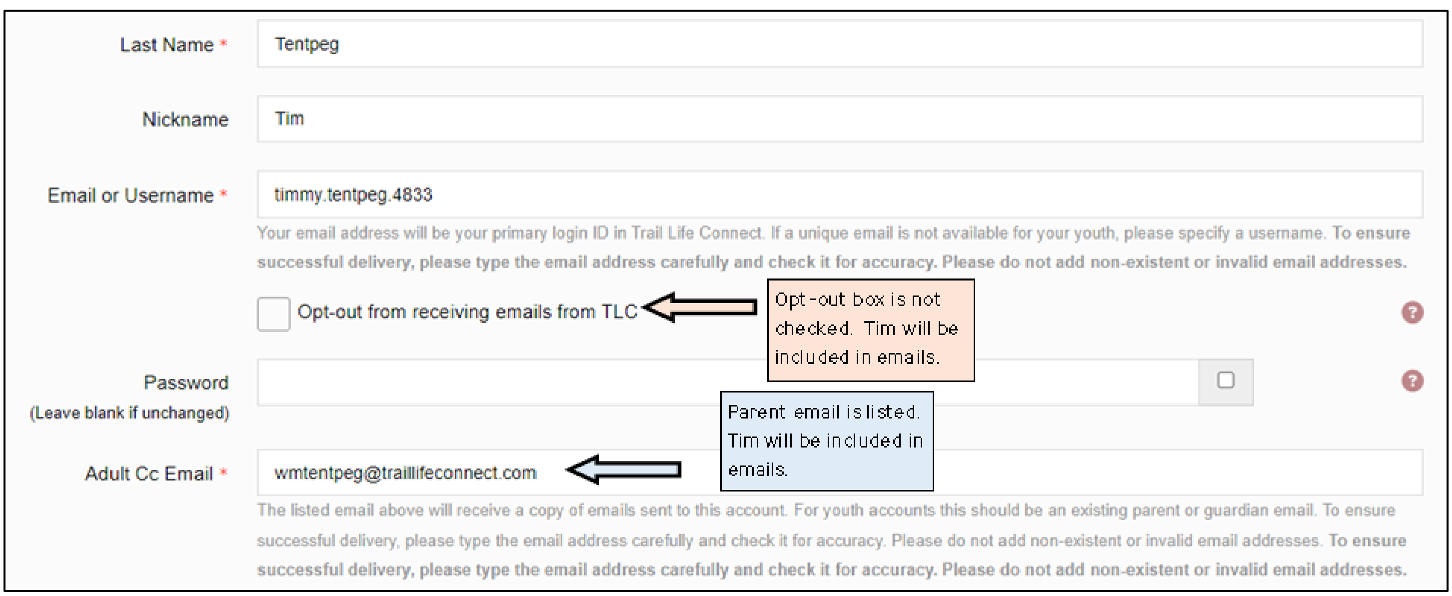
Specific members: No users specified.

Selected recipients

Hartsell, Sandra Point Man	Jane, Eliza Registered Adult	Rivers, Marc Registered Adult	Abernathy, Dave Troop Ministry Liaison
Forester, Glen TLC Test	Martinez, Rob Registered Adult	Forester, Felix Committee Chairperson	Kaypea, Kupid Troopmaster
Support, TLUSA Membership Team	Tentpeg, Tammy Registered Adult	Tentpeg, William Senior Ministry Leader	

Total: 11

*Note that only members with a valid email address will be listed. For a youth Trailman who does not have an email address, he will only appear if a parent email is listed within his profile. Also, member profiles contain a checkbox that gives individuals the ability to "Opt-out" from receiving emails from Trail Life Connect. If this box is checked, the individual will not show in the recipient list. (See example youth profile below)


Last Name *: Tentpeg

Nickname: Tim

Email or Username *: timmy.tentpeg.4833

Your email address will be your primary login ID in Trail Life Connect. If a unique email is not available for your youth, please specify a username. **To ensure successful delivery, please type the email address carefully and check it for accuracy. Please do not add non-existent or invalid email addresses.**

Opt-out from receiving emails from TLC

Password (Leave blank if unchanged)

Adult Cc Email *: wmtentpeg@traillifeconnect.com

The listed email above will receive a copy of emails sent to this account. For youth accounts this should be an existing parent or guardian email. To ensure successful delivery, please type the email address carefully and check it for accuracy. Please do not add non-existent or invalid email addresses. **To ensure successful delivery, please type the email address carefully and check it for accuracy. Please do not add non-existent or invalid email addresses.**

*Another note on sending emails to youth Trailmen:

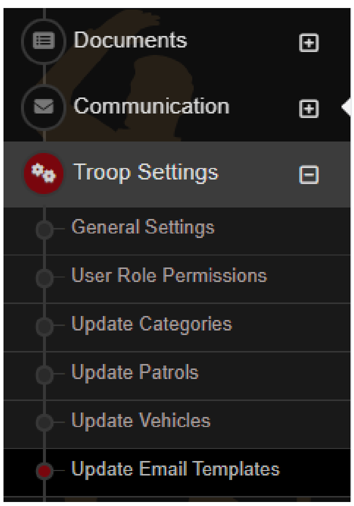
- If the youth Trailman uses a Username, they will only appear if the parent email is present in the 'Adult Cc Email' field of their profile
- If the youth Trailman has their own email address specified, the email will deliver to the listed youth email address *and* to the specified parent email address
- If the youth Trailman has their own email address specified, but does not have a parent email listed in the 'Adult Cc Email' field of their profile, then the email will deliver to the listed youth email address *and* a copy of the email will be sent to the Troop Ministry Liaison

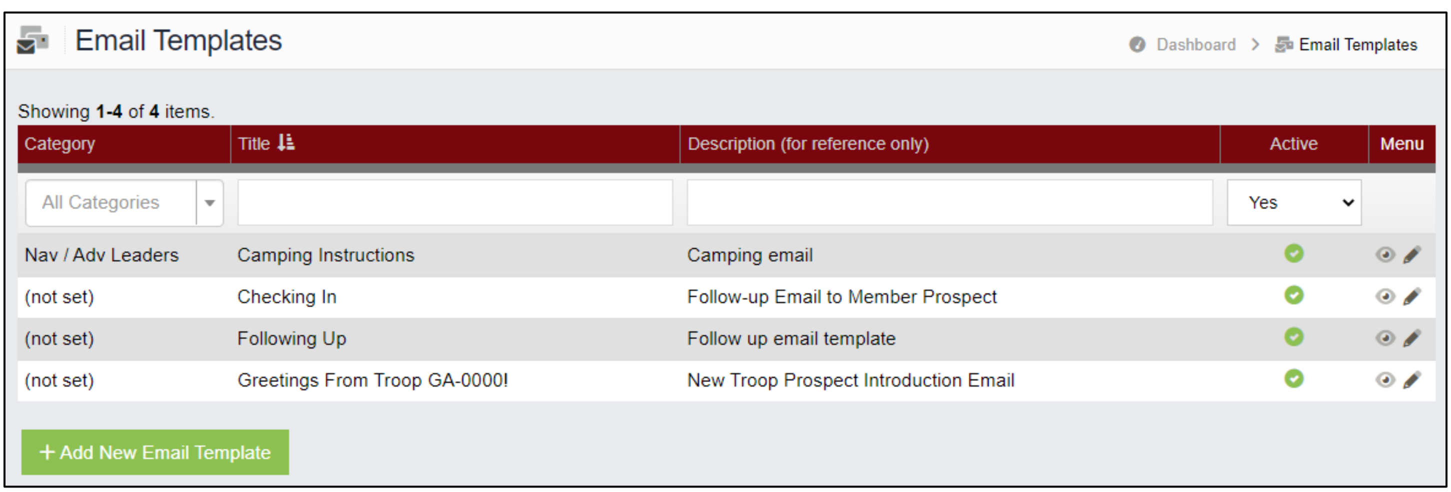
For youth protection, a parent or top Troop leader is always copied on youth emails sent from TLC.

Email Content

The second section on the *Email Members* page is where you will enter your email content. If you have created any email templates, you can click the drop-down for that field to select an existing template. A template can come in handy if you frequently send emails with the same, or similar, messaging and wish to save the message for multiple uses. A template could also be used to craft and store an email signature.

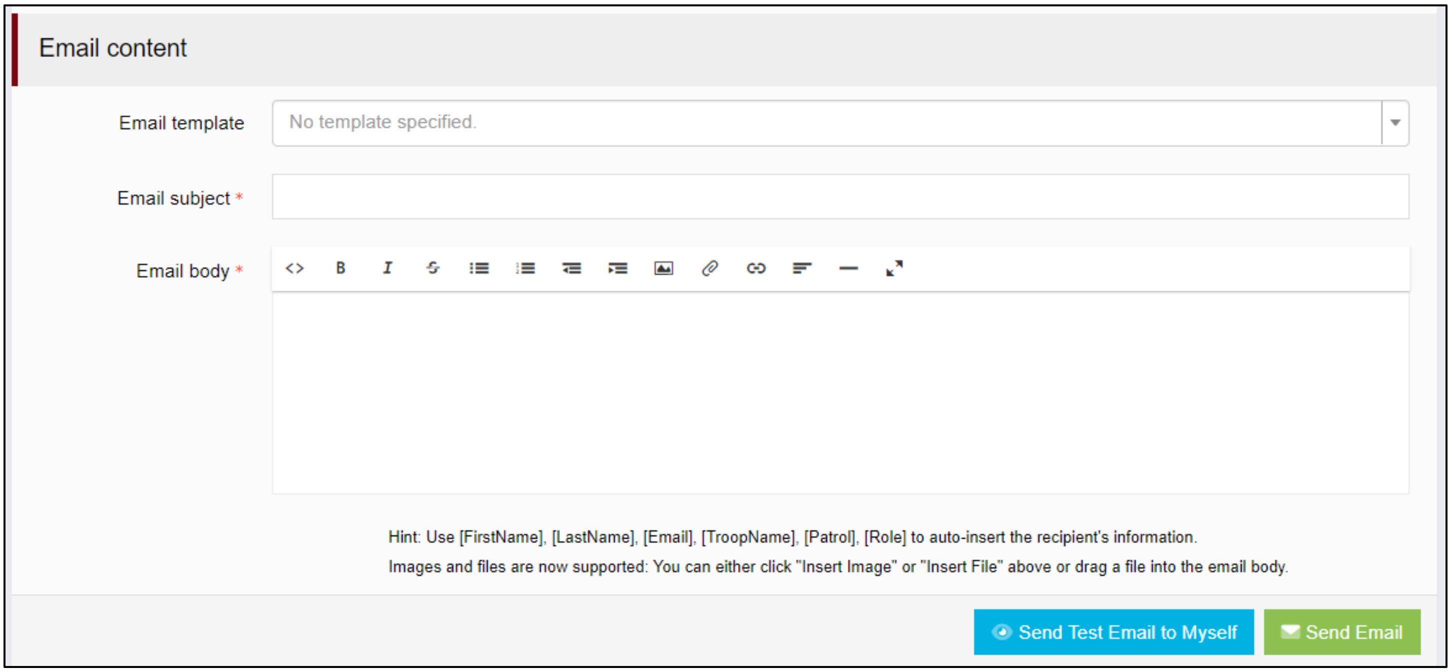
For adding email templates, look for "Troop Settings" on the left navigation menu and select the option to "Update Email Templates" underneath that section. On the *Email Templates* page, click the "Add New Email Template" button to create and save a new template for future use.





If you will not be using an email template, then you will need to specify a Subject and then enter the Body of your message in the appropriate text boxes.

For the Email Body section, you have the option of utilizing typical email formatting (such as bold and italics, creating bulleted or numbered lists, indenting, adding images, files, or hyperlinks, aligning text, adding lines, etc.) If you wish, you can also click the “‹ ›” icon to switch from normal text formatting to HTML text formatting (and vice versa.) Also, within the email body, you can use database tags to call specific information. (For example, if you are sending to multiple recipients and start your message with “Hello [FirstName]!” – the resulting message, when received, will contain each recipient’s first name, respectively.)



If you wish, you can send a test email to yourself to ensure that everything appears as desired. When you are ready for the message to go out, click the “Send Email” button.

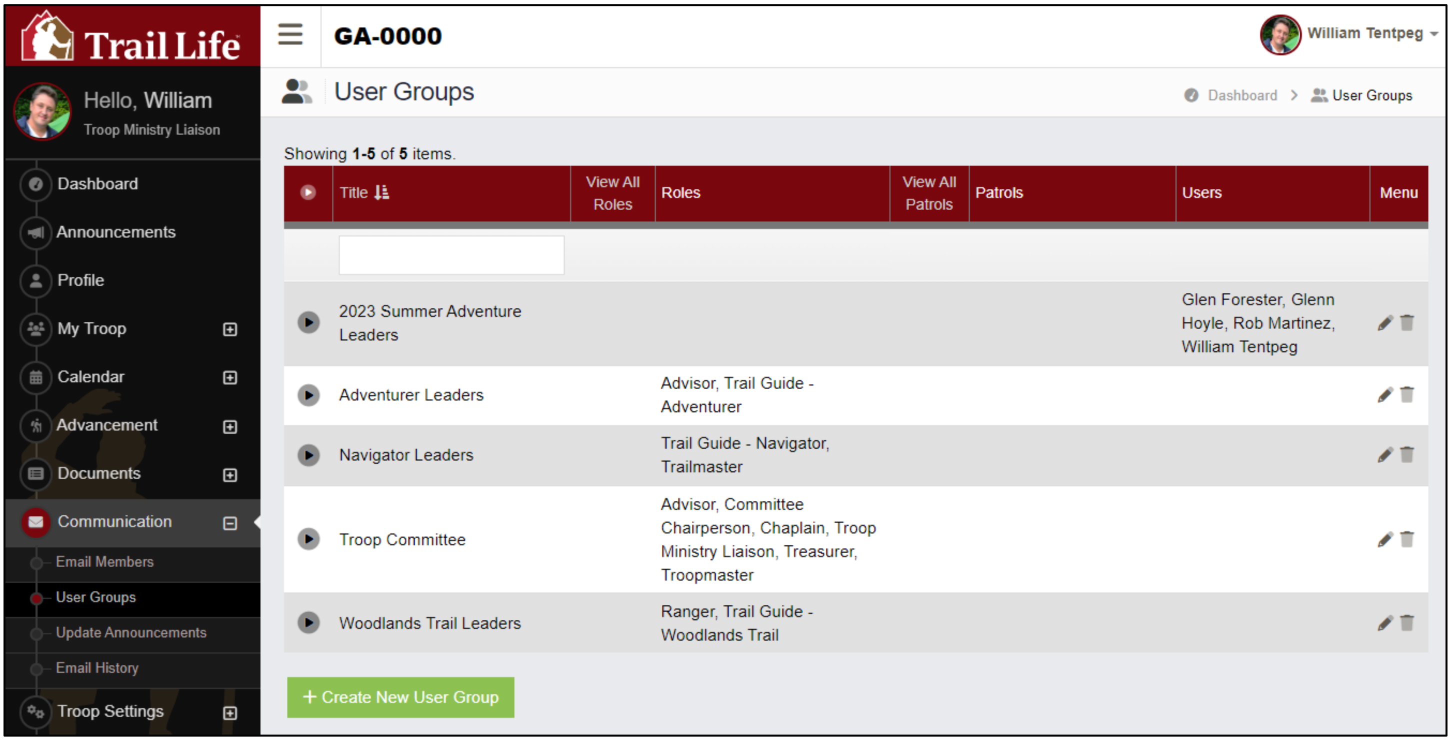
Email “Attachments”

Attaching an image or other file within a Trail Life Connect email does not behave in the same way as attaching such items in other email systems. Most other email system attach the physical file to the message, and every recipient receives a full copy of the file. In TLC, when attaching something to an email, the file is actually uploaded to the Troop’s Documents library (or Area/Region, depending on where the email is being sent from.) Recipient access, then, is provided via a link to that file which is stored in the Troop (or Area or Region) Documents library.

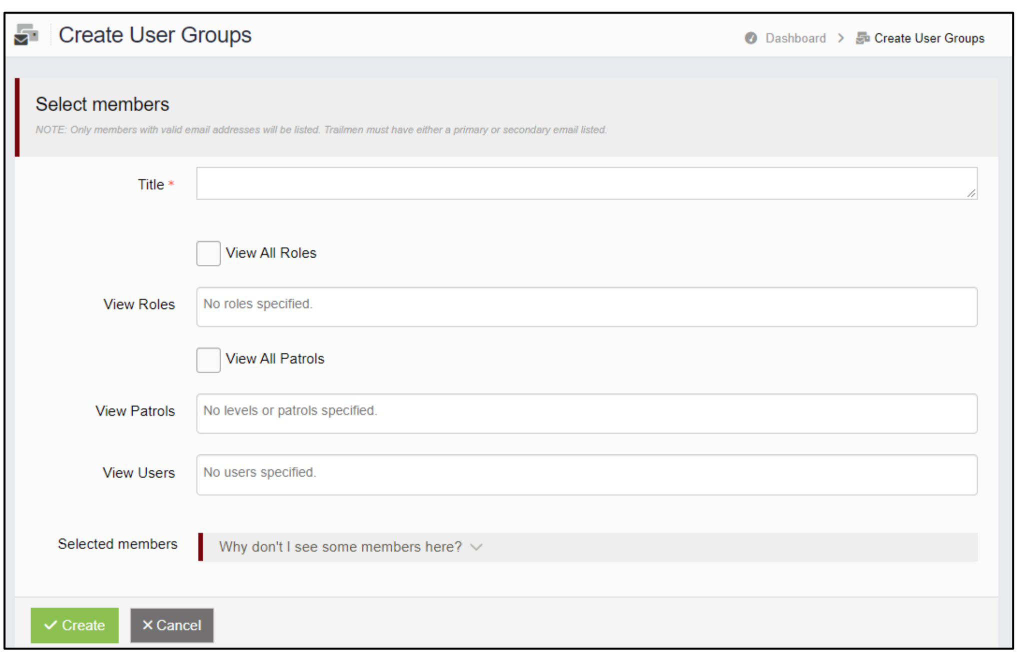
Think of the difference like a band releasing a new CD. Other email systems would be like mailing a physical copy of the CD to every recipient. The TLC email system would be like having only one digital copy of the CD centrally stored online and providing a link to that source to every recipient (similar to a service like YouTube, etc.) It is a leaner and more streamlined design that helps Trail Life Connect remain responsive and usable. Sometimes, recipients can have trouble accessing a linked “attachment” sent via email. In many cases, this is due to the recipient needing to first log in to TLC (since the file is stored within the system.) This can be overcome by setting the file to be publicly accessible. In other instances, you can visit the Troop’s “Manage Documents” page to inspect the view settings for that document to ensure the intended audience is included.

Creating and Managing User Groups

To access User Groups, expand "Communication" on the left menu and then select the option for "User Groups." The resulting page will display a list of available User Groups, along with options to edit and delete. The User Groups listing will display which Roles, Patrols, and/or Users are included in the group. Groups can also be searched by their 'Title' and sorted alphabetically if needed.

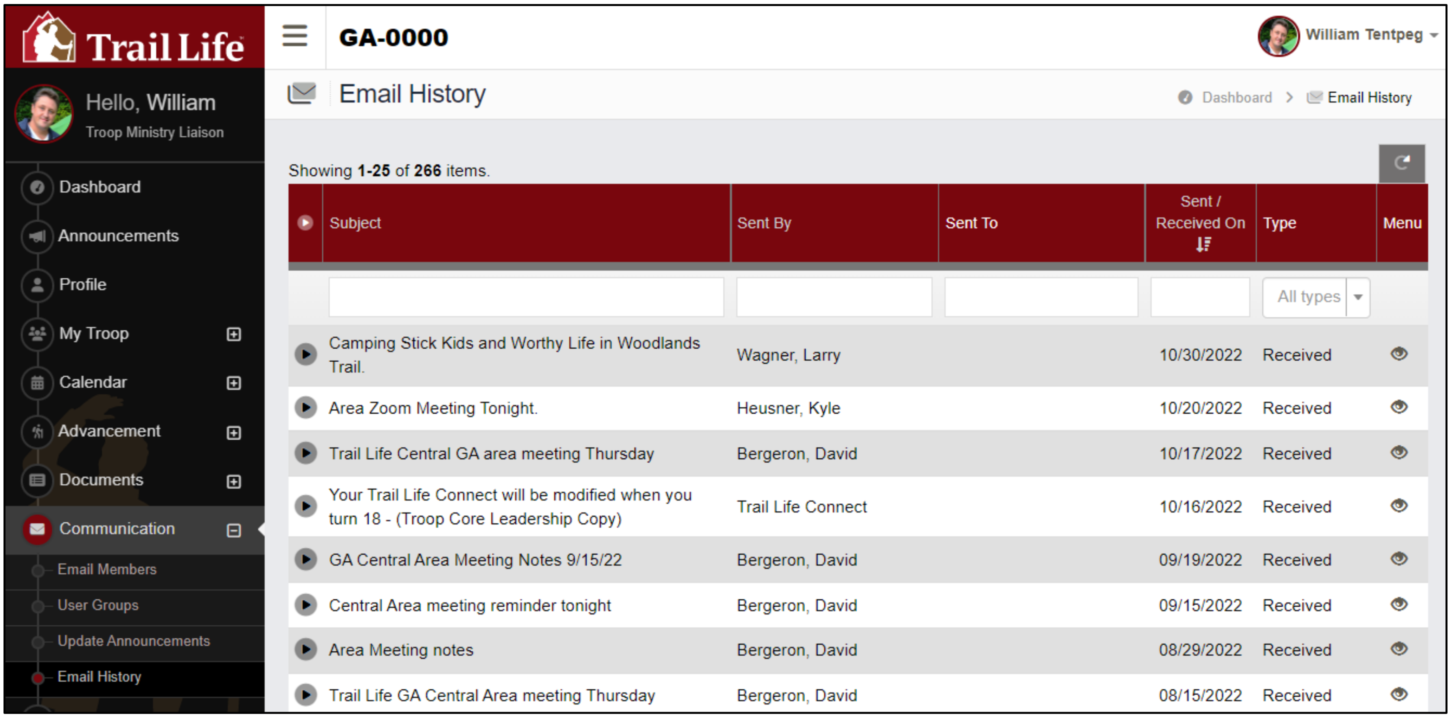


To create a new User Group, click the corresponding button titled "Create New User Group." On the resulting page, give the group a 'Title' and then select which Roles, Levels, Patrols, or specific members you wish to include in the group and then click "Create."



Email History

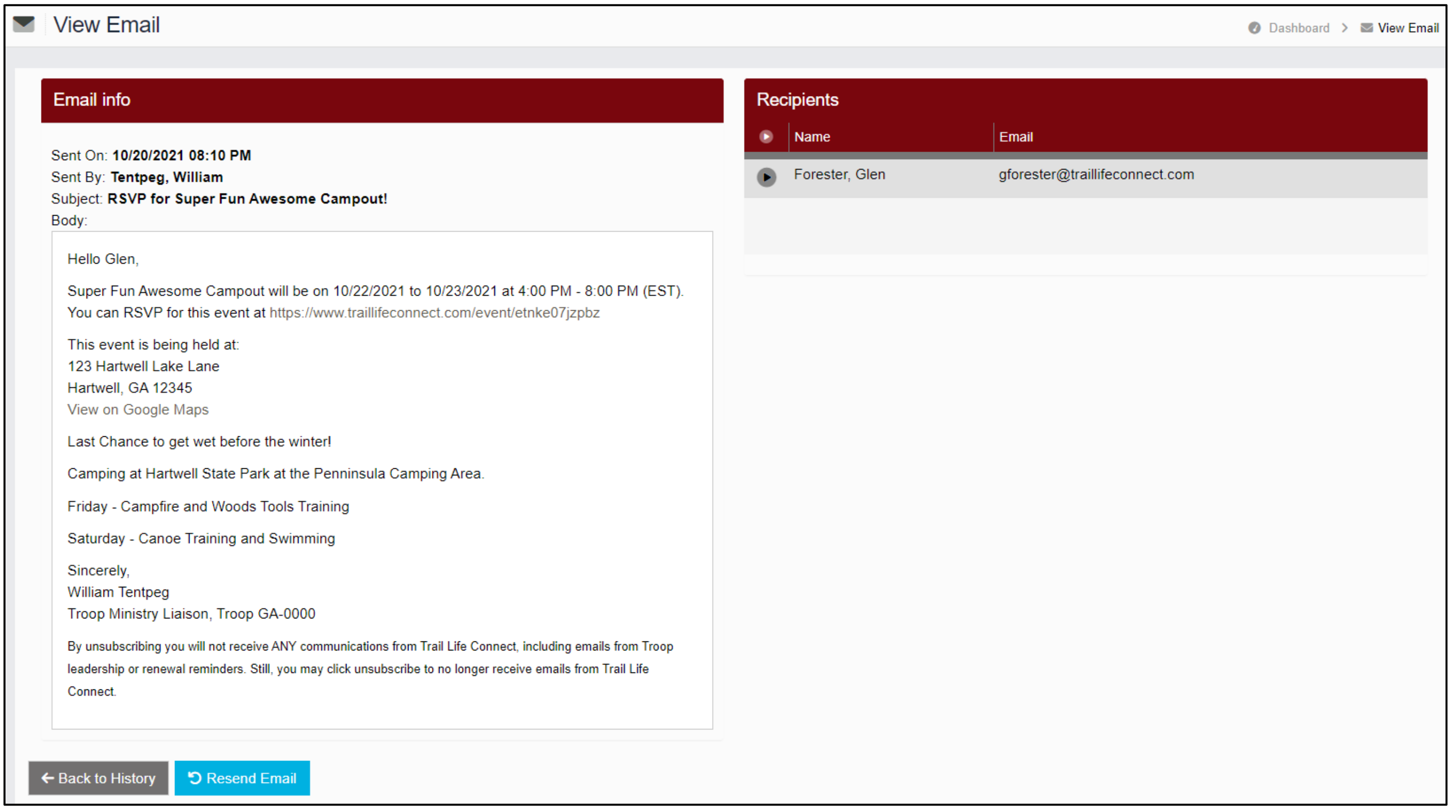
Leaders with email permissions in Trail Life Connect also have the ability to view all of their email history, as it relates to email messages that were processed through Trail Life Connect. This includes all Trail Life Connect emails the member has <u>Sent</u> and/or <u>Received</u>. To view the email history, expand "Communication" on the left menu and then select the option for "Email History."



The resulting list contains search and filtering options along the top, allowing members to:

- Search by 'Subject'
- Search by 'Sent By' (for emails that were <u>received</u>)
- Search by 'Sent To' (for emails that were <u>sent</u>)
- Search by the date the email was 'Sent/Received On'
- Filter by 'Type' to show emails that were "Sent," "Received," or show all types together

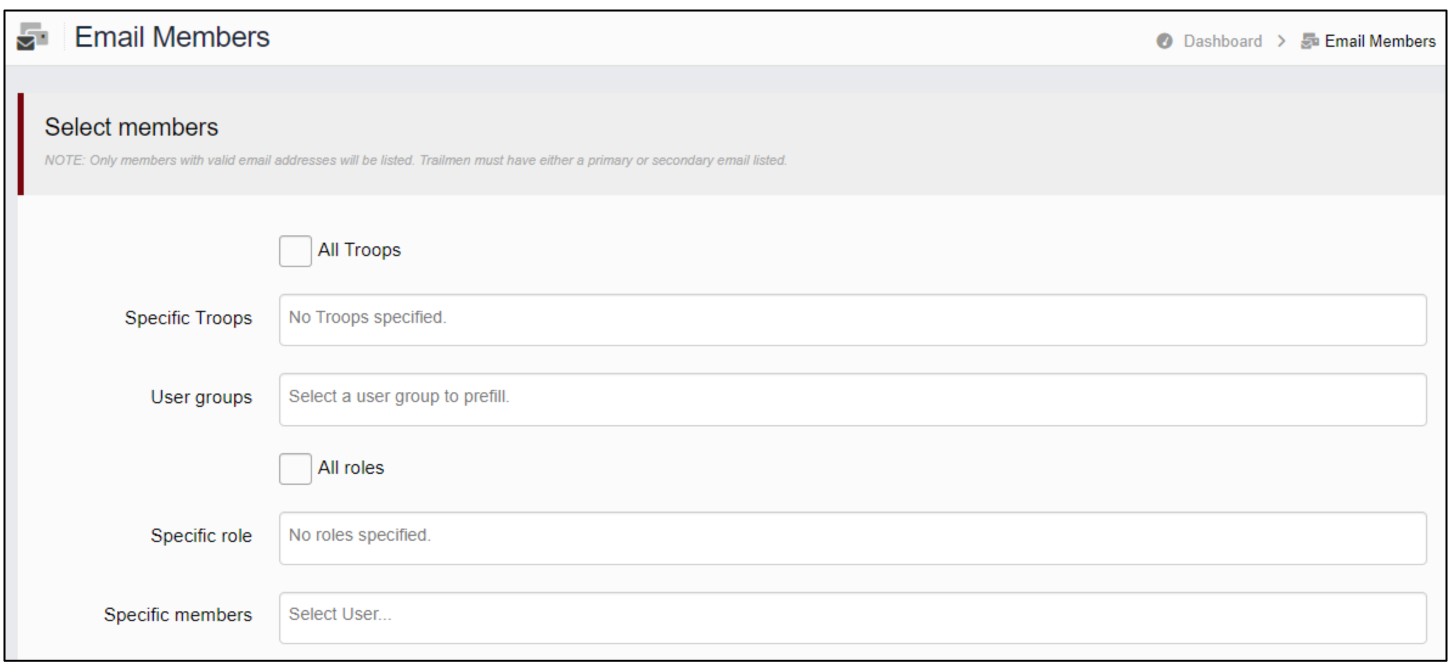
The "View" icon, in the right-hand column, can be clicked to open the past email and review the content. Links can be accessed, and information can be copied and pasted if needed for use elsewhere. For emails which were <u>sent</u> by the logged in member, a button option is present to "Resend Email."



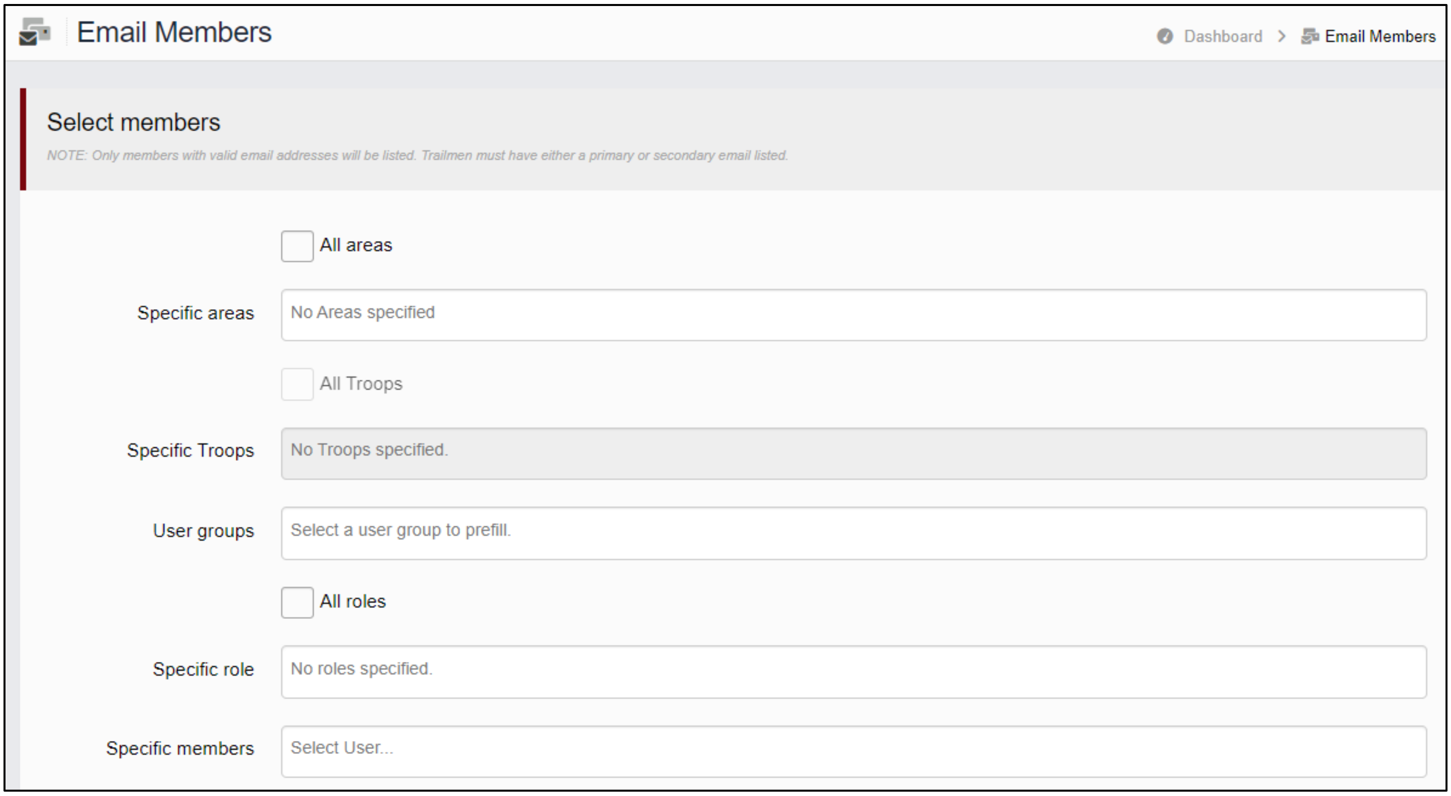
Differences for Leaders of Areas or Regions

A few items to note regarding the email function for leaders on Area or Region teams:

- When selecting members to email from an Area or Region level, you will find that the selection criteria eliminates "Patrols" (as they are not utilized at those levels)
- For an Area leader, you can select specific Troops within your Area (see example below)
- For a Regional leader, you can select specific Troops and/or Areas within your Region (see example below)
- If your Area or Regional role allows you to navigate between different Troops/Areas, be aware that if you utilize Email Templates – those templates will be saved to the particular Region, Area, or Troop you are currently operating within. (For example, if you are a Regional leader for the Southeast Region you may wish to create an email template to use for the Region. Currently, you are inside of, and viewing, Troop GA-0000. If you choose to create a template in the current scenario, the template will be stored in the list for GA-0000 and only available to use there. Likewise, if you create and save a template while operating on the Southeast Region page, the template will only be available there. You would not see, nor be able to select, that particular template if you were inside of, and viewing, Troop GA-0000, etc.)
- Similarly with email "attachments" – where you are located when sending an email with an "attachment" will dictate where that file is uploaded. If sending an email while switched into a specific Troop, the "attachment" file would upload to the Documents library for that Troop. Other Area or Region leaders would not be able to access that file link unless they also switched into that Troop.
- *Please see the Trail Life University training module for Region & Area Leaders which covers some of these items in more specific detail.



Email Member Options at the Area Level



Email Member Options at the Region Level