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Email to Contacts

The instructions below describe various ways to send emails to your contacts.

An email can be sent to a Contact individually through the Members Screen:

1. In the Members screen, click on the Contacts Tab at the top.
2. Near the bottom of the screen you will see Contact Phone/Fax/Emails listed there as well as a button labeled Send Email.
3. Clicking this button will launch the local email software on the computer to send an email to that email address.
4. Fill in a subject, type your email and send it.

An Exported list of all email addresses can be made through Procedures:

1. Click Procedures from the Main Menu
2. On the Backup/Import/Export tab, click on the button labeled Export E-mail Addresses for Contacts.
3. When the Universal Selection Engine populates, choose who you want to send emails to:
EX: All Members in the System, an Individual Member, Attended during a specific date range or Enrolled during a specific date range.
4. Click the Continue button in the lower right hand section of the screen.
5. On this screen choose whether you want the E-mail Addresses Only or E-mail Address with Contact Name. If you choose with Contact Name, then choose Export all E-mail addresses for a contact or only one per contact,
6. Choose All Contacts or specific Contact Types.
7. Click on the Export Now! button located at the bottom of the screen to create an Excel sheet of your email addresses.
8. Save the file, sort the emails so they are in alphabetical order, remove the duplicates. Note that there are duplicates if a parent and their email were entered for two different children.
9. Highlight and copy only the emails, paste them in the BCC field of your email.
10. Compose and send your email.

To create a report of contact emails by Phone Type:

1. From the Main Screen, click on the Reports button.
2. In the Members tab, select the button labeled Members' Contact Report by Phone Type.
3. Choose your criteria for whose email addresses you want to show on the report in the Universal Selection Engine and click the Continue button at the bottom right hand section of the screen.
4. Choose All Contacts or only specific Contact Types.
5. Choose Include Only These Phone Types = E-mail.
6. Optional: Type in a Report Subtitle.
7. Click on the Export to Excel button located at the bottom of the screen to create an Excel sheet of your email addresses.
8. Save the file, sort the emails so they are in alphabetical order, remove the duplicates. Note that there are duplicates if a parent and their email were entered for two different children.
9. Highlight and copy only the emails, paste them in the BCC field of your email.
10. Compose and send your email.