

# Managing Email Lists

## in The Appilistic Clubhouse Database:

**Overview:** Managing multiple email lists can be daunting. To take advantage of contact information you have already entered, a simple, effective system for email list management has been integrated into the Appilistic Clubhouse Database.

### Entering an Email Address into the Database:

1. A personal folder must be present for each person that will be on your email list. If not found, you can create one using the following steps:
  - a. At the **Main Menu** select **Personal Folders**
  - b. Select **Create a New Personal Folder**

The screenshot displays the 'Personal Folders' interface. At the top, there is a title bar with 'Personal Folders' and a 'Reporting Sub-Group' dropdown set to 'Your Clubhouse'. On the left is a yellow sidebar with buttons for 'Show Main Menu', 'Data Entry', 'Reports', 'Contact Management', 'Admin. Tools', 'Active Status', and 'Help'. The main area is the 'Data Entry Panel', which contains 'Enter Existing Folders' and 'Add' buttons. Below these are two sections: 'Open a Personal Folder' with a 'Data Visibility for Editing' dropdown and a 'List Currently Affiliated People' button, and 'Open an Organization Folder' with a dropdown menu. A red arrow points to the 'Create a New Personal Folder' button in the 'Open a Personal Folder' section.

- c. Select the appropriate category on the **New Personal Folder Control Panel**



d. On the **Home Panel** enter the person's information, including, at least,

- First name
- Last name

Referral: Doe, Mary Close

General Medical	General Medical 2	Providers	Insurance	Diagnoses	Meds	Inpatient Care	Permissions	
Home	Membership	Tags	Emergency Contact	Education	ID	Income	Housing	Transportation

**General Contact Information:** Review Home Tab 6/26/2014

Title	<b>Last Name</b>	<b>First Name</b>	Middle Name	Suffix	Nickname	Reporting Sub-Group
	Doe	Mary				Your Clubhouse

Home Telephone

Mobile Telephone

Work Telephone

Email Address

**Home telephone OR address satisfies contact information data check**

Street Address

City

State  Zip Code

County

States and Provinces.

Notes

?	By Staff	General
OK to Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
OK to Mail	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
OK to Email	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
OK to Visit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
OK to Outreach	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

PASSWORD NOTE: Your password will be visible to all Staff that have access to personal folder information. This means that Staff will be able to assist you in the event that you forget your password. It also means that you should select a password that you don't mind sharing with Staff. DO NOT use the same password that you use for other personal business, such as your ATM card.

2. On the **Home Panel** enter a complete, valid email address into the Email Address field.

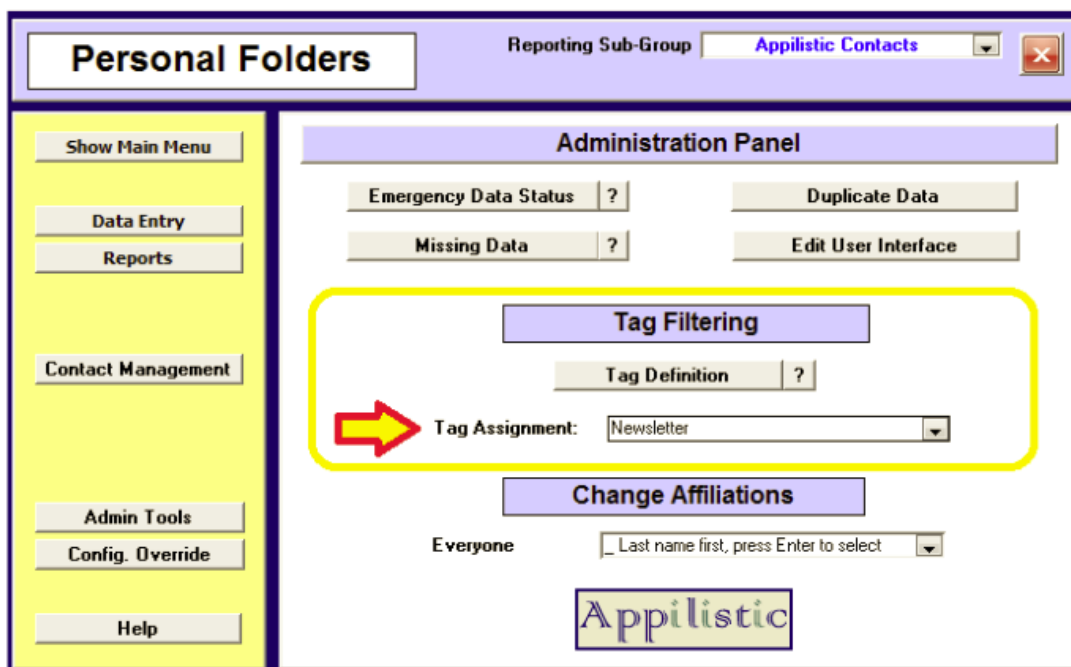
The screenshot shows a web-based patient record interface. At the top, there is a header with 'Referral: Doe, Mary' and a 'Close' button. Below this is a navigation menu with tabs for 'General Medical', 'General Medical 2', 'Providers', 'Insurance', 'Diagnoses', 'Meds', 'Inpatient Care', and 'Permissions'. A secondary menu includes 'Home', 'Membership', 'Tags', 'Emergency Contact', 'Education', 'ID', 'Income', 'Housing', and 'Transportation'. The main section is titled 'General Contact Information:' and includes a 'Review Home Tab' button and a date '6/26/2014'. The form contains several input fields: 'Title', 'Last Name' (with 'Doe' entered), 'First Name' (with 'Mary' entered), 'Middle Name', 'Suffix', 'Nickname', and 'Reporting Sub-Group' (with 'Your Clubhouse' selected). There are also fields for 'Home Telephone', 'Mobile Telephone', 'Work Telephone', and 'Email Address' (with 'mdoe@email.com' entered). A red arrow points to the 'Email Address' field. A red confirmation message states: 'Home telephone OR address satisfies contact information data check'. Below this are fields for 'Street Address', 'City', 'State' (with 'Massachusetts' selected), 'Zip Code', and 'County'. A 'Show All States and Provinces.' button is at the bottom left. On the right, there is a section titled 'Approved Methods of Contact' with a '?' icon and two columns: 'By Staff' and 'General'. Both columns have checkboxes for 'OK to Phone', 'OK to Mail', 'OK to Email', 'OK to Visit', and 'OK to Outreach', all of which are checked. At the bottom, a 'PASSWORD NOTE' is displayed.

### Creating an Email List:

1. The flexible tagging system that is built into the database is the perfect tool for creating an email list.
2. User defined tags can be created on the **Admin Tools** panel of the **Personal Folders** module.
3. Select the **Tag Definition** button.
4. Create your new tag on bottom, \* 'd line of the resulting table. Create a user defined tag with a name that reflects the purpose of the list.
5. For greater detail on this process, see the procedure **Create and Utilize User Defined Tags**.

## Managing an Email List:

1. Manual management of your email Tags will make it easy to respond to unsubscribe requests and to control who is on each list.
2. A great way to manage your email list is available in the **Tag Filtering** section of the **Administration Panel**.

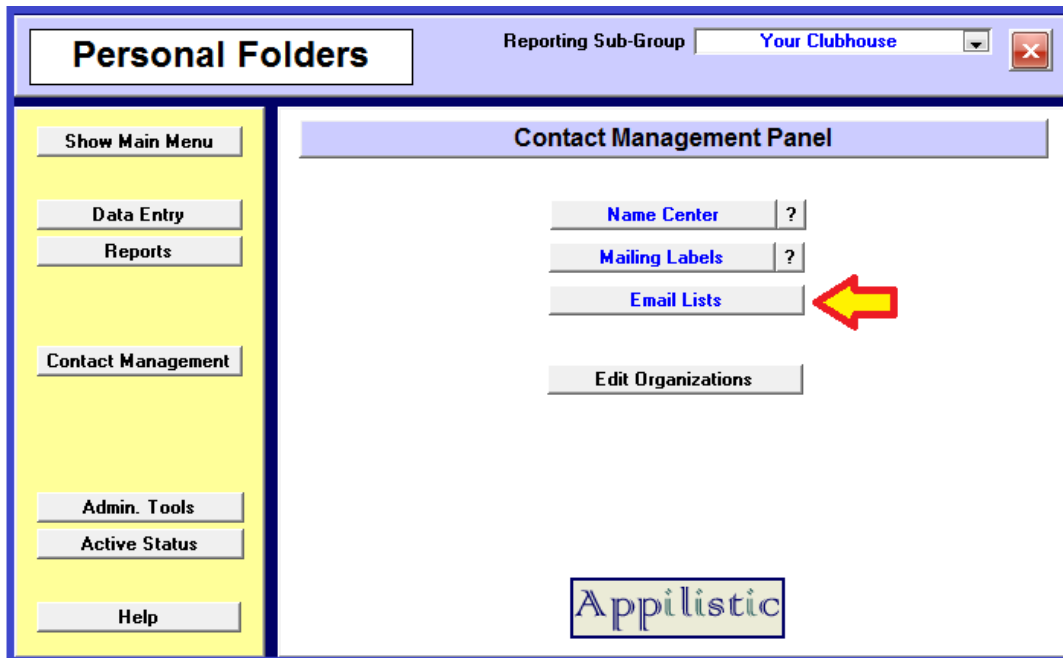


3. Select your email list tag on the **Tag Assignment** pull down menu to open a complete listing of individuals that are on the list. From here you can:

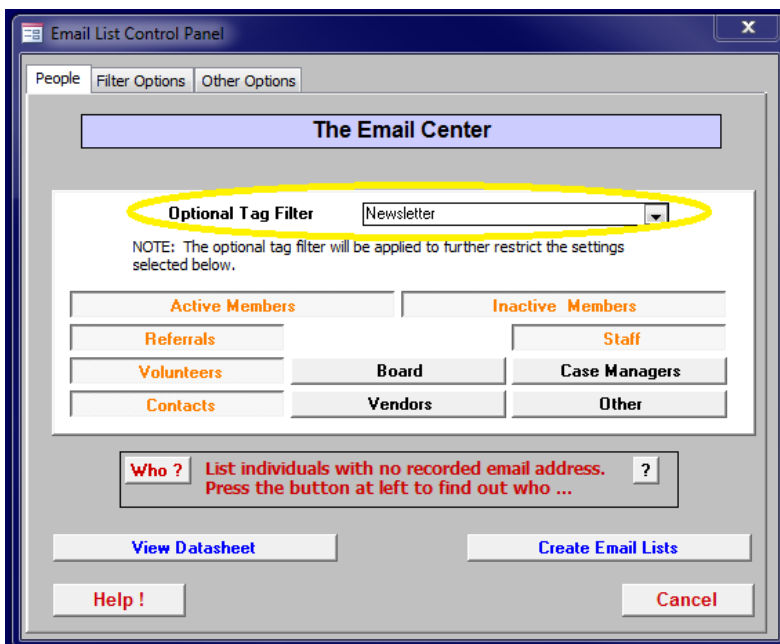
- Add names to your email list using the bottom \*'d line;
- Remove names by clicking on the left hand record selector and pressing the [Delete] key;
- Open a personal folder to check the email address;
- Resort by closing and reopening your list;

## Using an Email List:

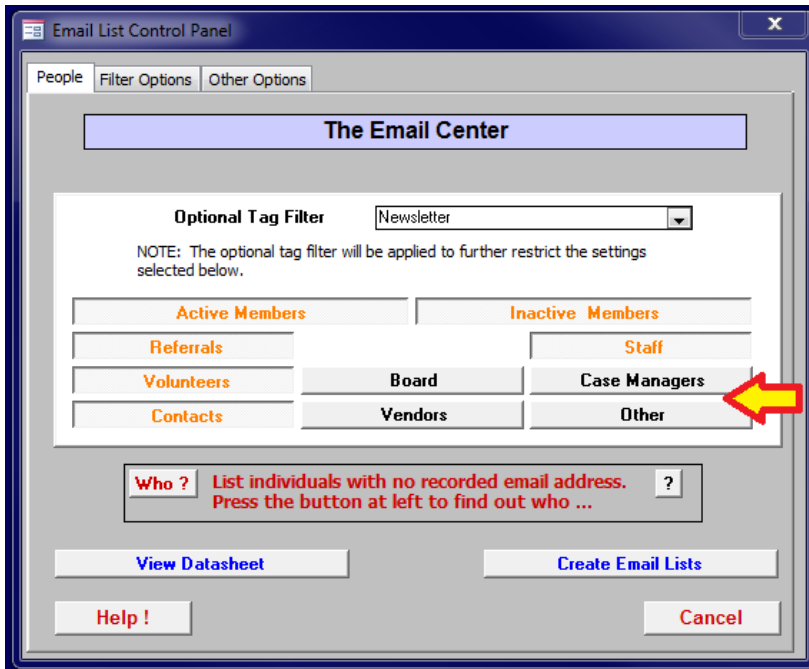
1. Open the **Personal Folder** module and navigate to the **Contact Management Panel**
2. Press the **Email Lists** button.



3. To utilize an email list, specify your email list tag as the **Optional Tag Filter**.

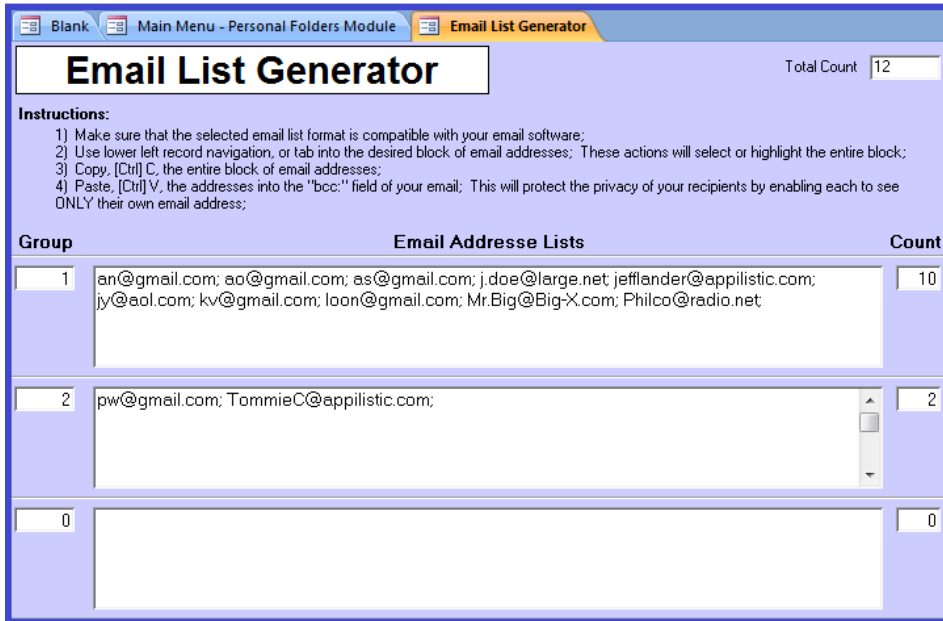


4. Make sure that you are not doing additional filtering with the affiliation filters. The affiliation buttons should all be depressed (illuminated).



5. Press the **Create Email Lists** button in the control panel's lower right corner.

6. Your email list will be broken into small groups. Should you need to change the number of email addresses in each group, go to the control panel **Other Options** tab. Microsoft Outlook limits the number of emails that can be distributed at one time to about 75. Exceeding this number of emails will cause the list to be truncated.



7. Tabbing from block to block highlights the entire contents of one block at a time.

8. Use [Ctrl]C to copy and [Ctrl]V to paste the contents of one block into your email for distribution.

9. Add your own email address to the end of each subgroup to make sure that everything worked well.