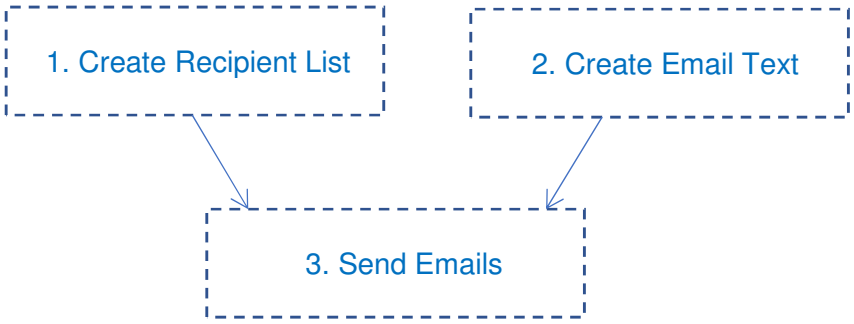
Kairos® Mail

User Guide

Revision C
7/4/2021



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KairosMail User Guide

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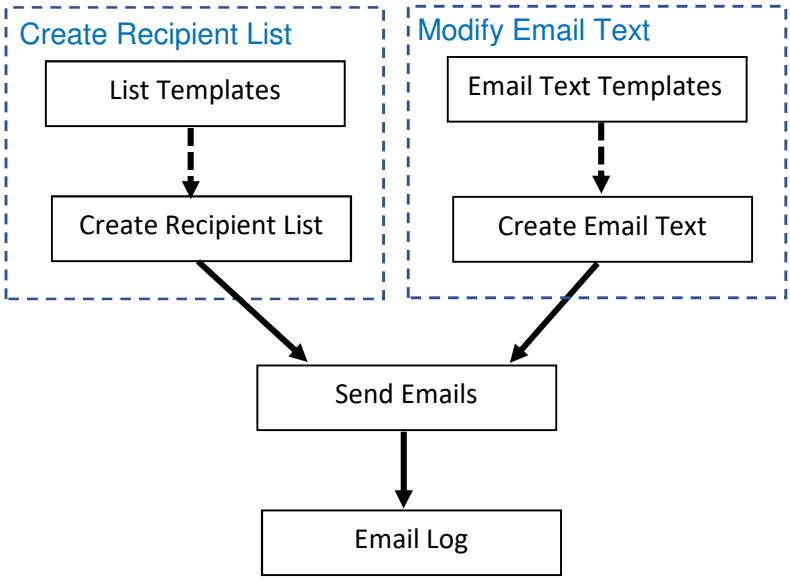
KairosMail Process Overview



I. Purpose

The KairosMail feature in KairosMessenger provides a simple to use tool to allow persons authorized by their elected role to easily perform their responsibilities regarding communicating with other persons on the Advisory Council and/or State Chapter Committee. In other words, the KairosMail feature is intended solely to assist you in improving the ministry related communications by making it easy to fulfill the ministry expected functions as defined in the Advisory Council Operating Procedures (ACOP) and/or the State Chapter Committee Operating Procedures (SCCOP).

The KairosMail feature is to be used solely to conduct ministry authorized communications. Any misuse of the system may be grounds for removal of authorization to the system and even removal from the ministry.

It is important to understand that the "KairosMail" feature described here is not the same as the "Election Email" system that is accessible only by the authorized Secretary in the Organization Election section of KairosMessenger. KairosMail is accessed by the "Email" button on the main menu button list. KairosMail is accessible by any authorized elected person in the Advisory Council or State Chapter Committee whose job description calls for them to be in communications with others in the organization for specific purposes as defined by their elected role.

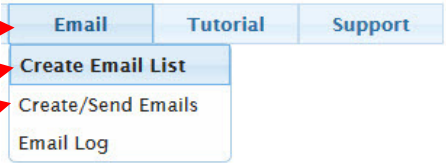
II. Overview

The process of emailing is broken into two steps:

1. Building a "current" mailing list

2. Creating the email text and sending the emails

Additionally, the system maintains a log of your emails that you have sent.



Once these two steps are completed, a simply click of the Email button will initiate the emailing of the email text to the individuals in the "current" mailing list.

It is important to understand that the KairosMail system does not use CC or BCC to send bulk emails. Each email is individual, and can be personalized through the use of "email merge tokens." So, if your "current" mail list has 100 persons on it, then KairosMail will send out 100 individualized emails.

The system will record in a log the fact that you have sent emails, and will record the number of emails sent and the contents of the email text.

The emails sent will be delivered using your authorized, personal email address so that if a recipient replies to your email, the reply will go to the same address as your authorized email address.

III. Email Deliverability Issues

Perhaps a better name for this section is "why didn't my email get delivered?" The reality of the email "world" is that there are no "standards" that all email providers support. Any email provider is free to change the "rules" they follow at any time. This reality does create challenges in the "bulk email" environment.

There are three main kinds of issues that can impact the deliverability of an email:

1. Badly "formed" email address
This is a case where the recipient email address is not valid from a basic email format. For example, if there is no @ in the email address or the .com is misspelled, or even no email address at all, etc. In this case, KairosMail will not send the email, and the number of emails sent will not reflect these kinds of errors in your email address data.

2. Invalid email account
This is a case where the email address is correctly formed, but the recipient's email provider has rejected the email for any of a multitude of reasons. The most common reason is that the email address is not a valid address for the email provider. For example, you sent an email to Bob123@gmail.com and gmail does not actually have a Bob123 account. Another example is the recipient's email account has a limit to the number of received emails and the user hasn't deleted old emails and so their account is full.

In this kind of case, the email will be successfully sent to the person's email provider (ie gmail) but the provider rejects the email and returns it to the sender. In most cases, that rejection notification will go to your SPAM/Junk email folder. So, you will want to check your SPAM/Junk folder after sending the emails to make sure no one got kicked back to you.

3. Email provider DMARC policy
Some email providers have implemented what is called a "DMARC" policy. This means that if a sender who uses the email provider (ie Yahoo) sends an email to a Yahoo recipient, but the email was not sent from a Yahoo email server, then the email will be rejected by the Yahoo recipient. It is considered an extreme approach to helping protect their users from someone sending fake emails using one of their customer's email addresses.

Since your emails from KairosMail are not coming from an email provider (like AOL or Yahoo) but from the KairosMessenger system, and if your authorized email address is based on one of the "DMARC" aware email providers, then your emails would normally be rejected by recipients with the same email provider. KairosMail is aware of the providers who support the "DMARC" policy and will change the sender email address from your authorized address if you use one of those providers and your email will be from jobtitle@KairosMail.org where "jobtitle" is your authorized elected role.

If the recipient replies to your email, it will be sent to your actual email and not to KairosMail.org.

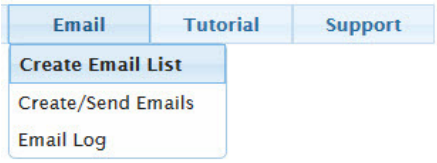
As of this date, there are four email providers that have implement a DMARC policy as described. They are:

Yahoo.com AOL.com RocketMail.com Ymail.com

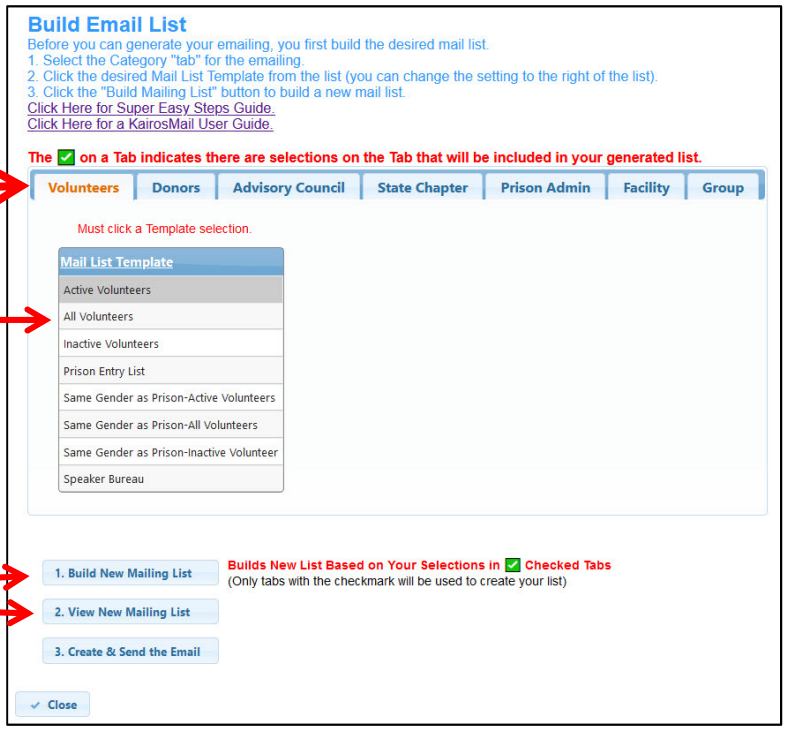
If your email address is using one of these providers, your "from" address will automatically be changed to the jobtitle@KairosMail.org format and the "reply to" address will remain your normal address so you would receive any replies at your normal account.

IV. Creating the Email List

The first step in performing a bulk email is to create the appropriate email list by clicking on the Create Email List button.



This opens the Build Email List screen. There are four "sections" to this screen:



1. Type of Recipient Tabs
These tabs define the types of recipients that you are needing to send to. Which tabs are visible for you depends on your specific elected role.

2. Mail List Template
This is a list of common types of email recipients that your role calls for. By clicking on one of the entries, the system automatically defines the screening criteria to automatically select the appropriate list of persons to receive the email.

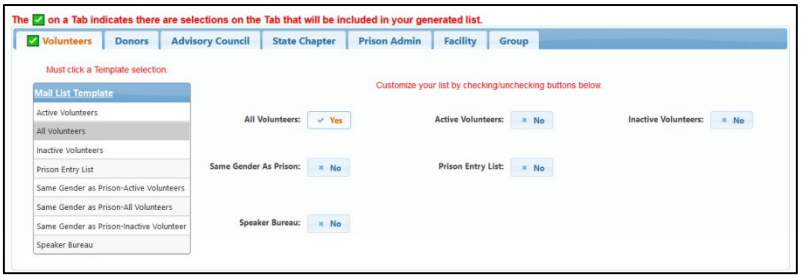
3. Build/View Mailing List
The Build Mailing List button will automatically build a new email list based on the current, up to date data in KairosMessenger. This list is not a list that is kept from mailing to mailing, but is rebuilt each time you are to perform a new mailing so that your persons and email info are the most up to date for all emailings.

Once you build the email list, you can click the View Mailing List button to see and edit the resulting email list.

The resulting mail list is not something you save or set up as a "group" like a typical email system. Instead, as volunteer data or election data changes in the normal course of a year, the appropriate contact data is changing, so KairosMail builds a new list for you using the most up to date information.

4. Customization Buttons

Once you click on an entry in the Mail List Template, you will see a set of buttons appear on the right side of the screen. The buttons allow you to change the selection criteria based on a specific set of circumstances that are different from the normal, expected functions of the role.

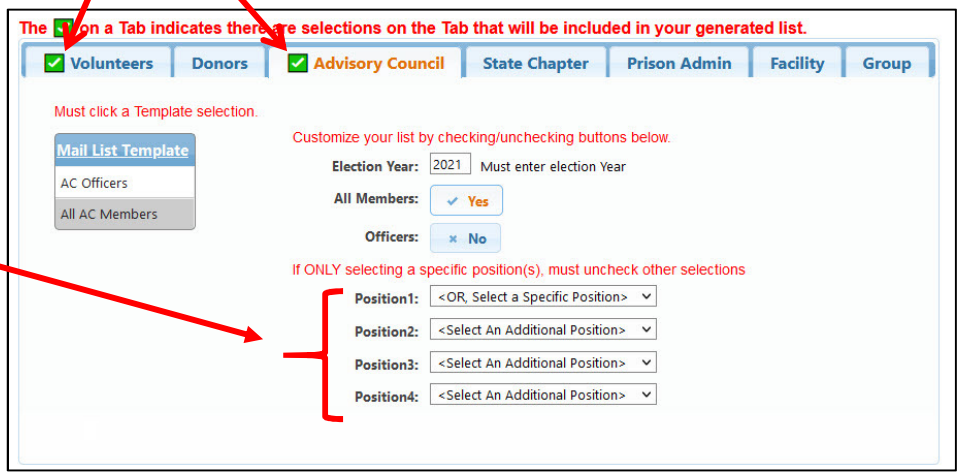


You click on a button to enable or disable the use of the function as the mail list gets built. Not every button is available to every position.

Notice that when you select a Template record, that a green checkbox is ✓ displayed in the Tab's header. This is a visual indication to you that you have made a selection on that tab that you want included in the email list.

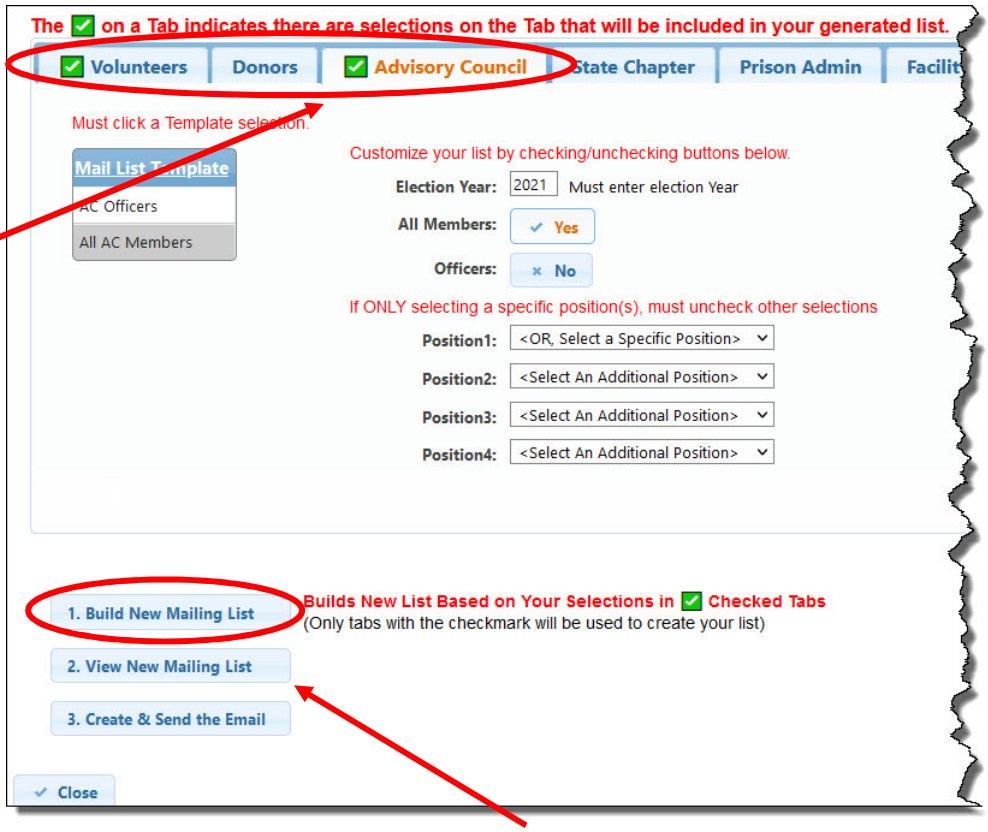
You can also combine the mail list that will be generated from multiple tabs. In other words, you could create a mail list of Volunteer persons AND Advisory Council persons into a single email list and avoid having to create and send the same email to separate lists.

Again the green checkbox on the various tab headers highlight that you are including the settings you made on those tabs in the email list.



Also, notice that, depending on your authorization, some tabs may allow you to select persons based specifically on their elected role. You can select up to four different roles to include in the email list.

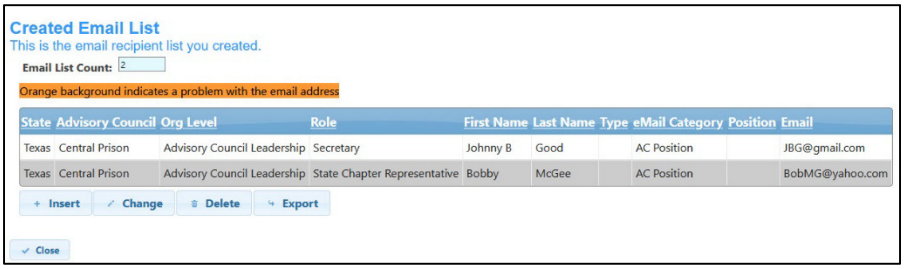
Once you have made all your selections (in this example, we have made selections for Volunteer persons and Advisory Council members) and checked the "Include settings" check box on each, you can see the green verification checkbox on their tab titles.



Then, to create the combined mailing list, click the "1. Build New Mailing List" button. Note the reminder on its right that only the tabs with the green checkbox will be included.

After you create the mailing list by clicking the "1. Build New Mailing List" button, you can view and edit the mail list by clicking the "2. View New Mailing List" button.

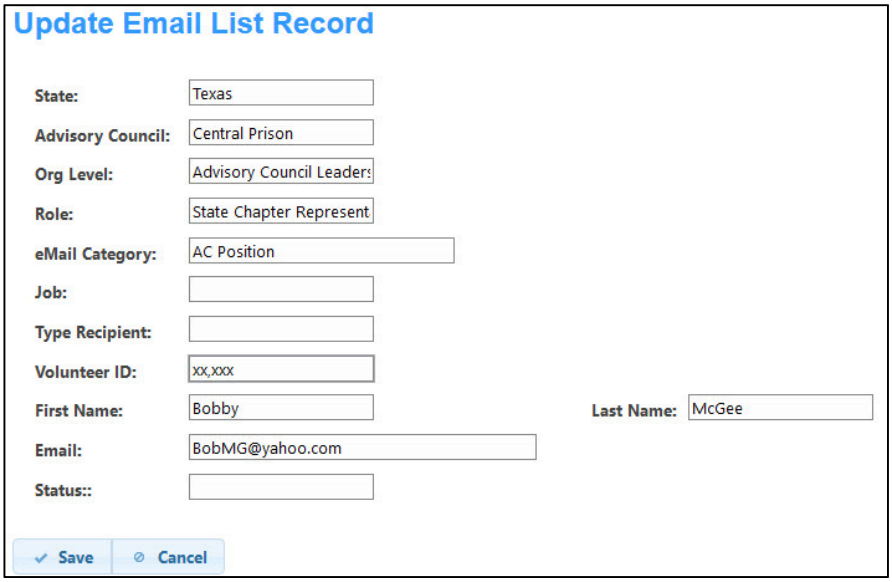
This will give you a list of the persons who are targeted for your mailing. You'll be able to see their email address, or lack of one. If you feel like you need to make a correction to this specific list, just click on the desired entry and click the Change button. If you feel that it is appropriate to remove someone from the mailing list, click on the desired entry and click the Delete button. Notice that if the person's email address is missing or has been flagged in their volunteer record as being "bad," then their email address field will be highlighted in orange, and they will not receive the email. Any correction needs to be made in the person's volunteer record before sending.



In a case where you felt that an additional person needed to be added to the list, you can click the Insert button to add an additional entry.

When you Change an entry, you will see the data items that are provided and you can revise them as needed. Complete the change by clicking the Save button.

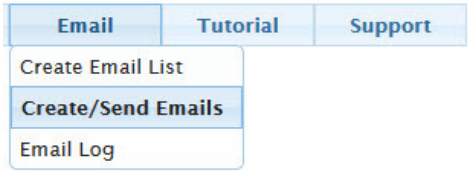
Once you have created the new, updated email list, then you are ready to create the email text and send it by clicking the Create/Send Email button at bottom of the Email list screen or by clicking the Create/Send Email button on the main menu.



Remember, the Volunteer ID is required in order for the person to receive an email, and the person's volunteer record must not have emailing restrictions, like "Bad" email address.

V. The Email Text

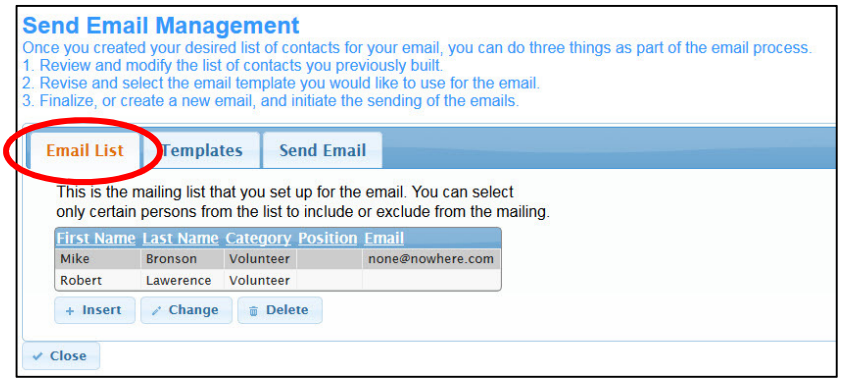
Once you have created the appropriate email list for your communication, then you will need to create the text for your email by clicking on the Create/Send Emails menu button.



The opens the Send Email Management screen. There are three tabs available to you:

Email List

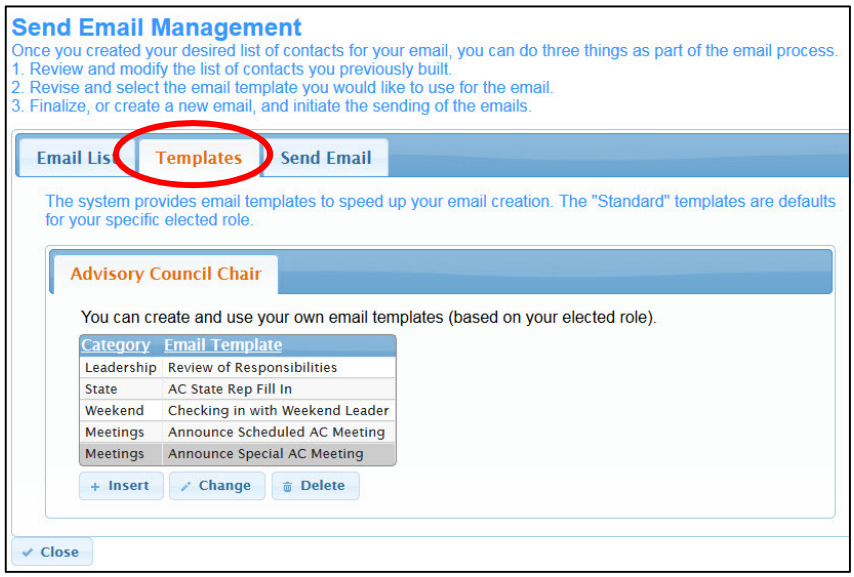
This is the email list that you previously created for the task at hand. You cannot "create" the email list here, but you can see the one that was created.



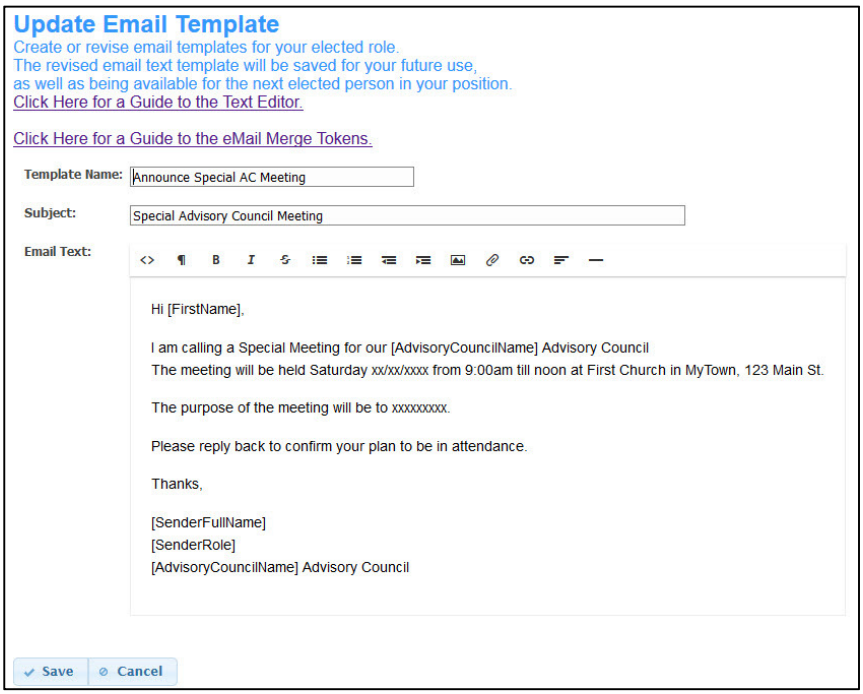
Templates

The Templates tab gives you a list of the common kinds of email messages that your elected role requires. This list can be customized to more correctly fits your local situation.

Click on the desired template to select it for your emailing. Or, if you want to review and perhaps revise it, you select it and then click the Change button.



When you revise the selected template, the Update Email Template screen give you access to the subject and to the text itself. You can revise the text of the template.



Note that when you change the text template contents, that becomes the standard template contents for future use.

The Text content makes use of an editor that is designed to be compatible with email standards. The built-in editor is explained in the following section.

Note that items that are surrounded by the [and] characters are referred to as "Merge Tokens" and they allow the system to personalize the content for each email. Refer to the Merge Tokens section for details.

VI. Sending the Emails

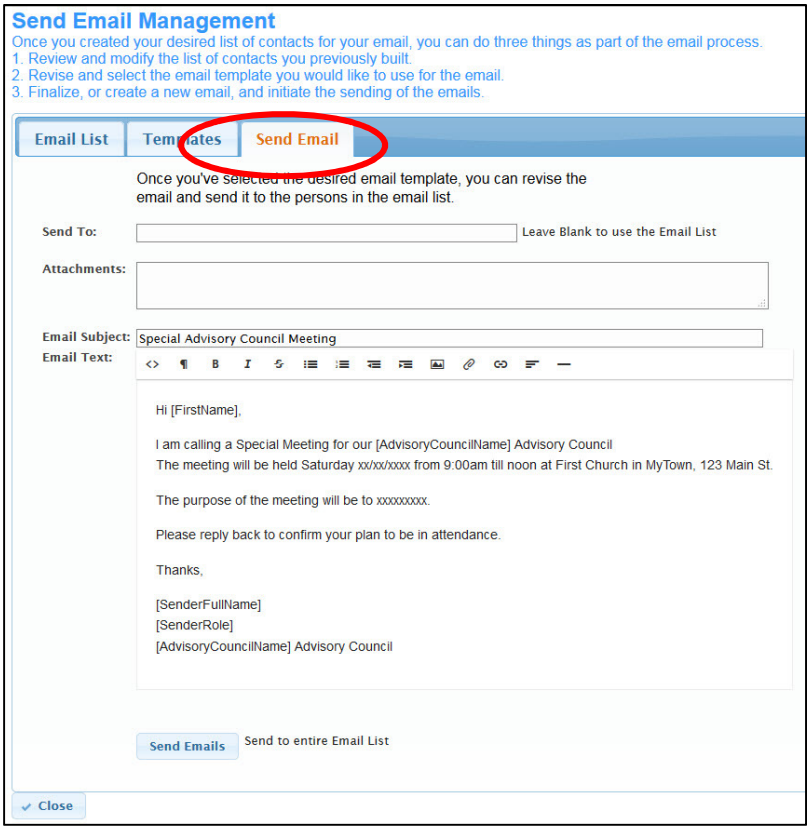
The third tab is the Send Email tab.

When you click the Send Email tab, it copies the contents of the Template that you have selected on the Templates tab.

You can revise the email text on the Send Email tab for the specific email you are sending. Revisions here are not saved to the Template for future use, but are only applicable for this specific email.

Like the Template Tab, you have access to an editor to assist you in the customization of the email text.

You do not need to enter a Send To address – the system will automatically use the email address of the list of recipients that you created.



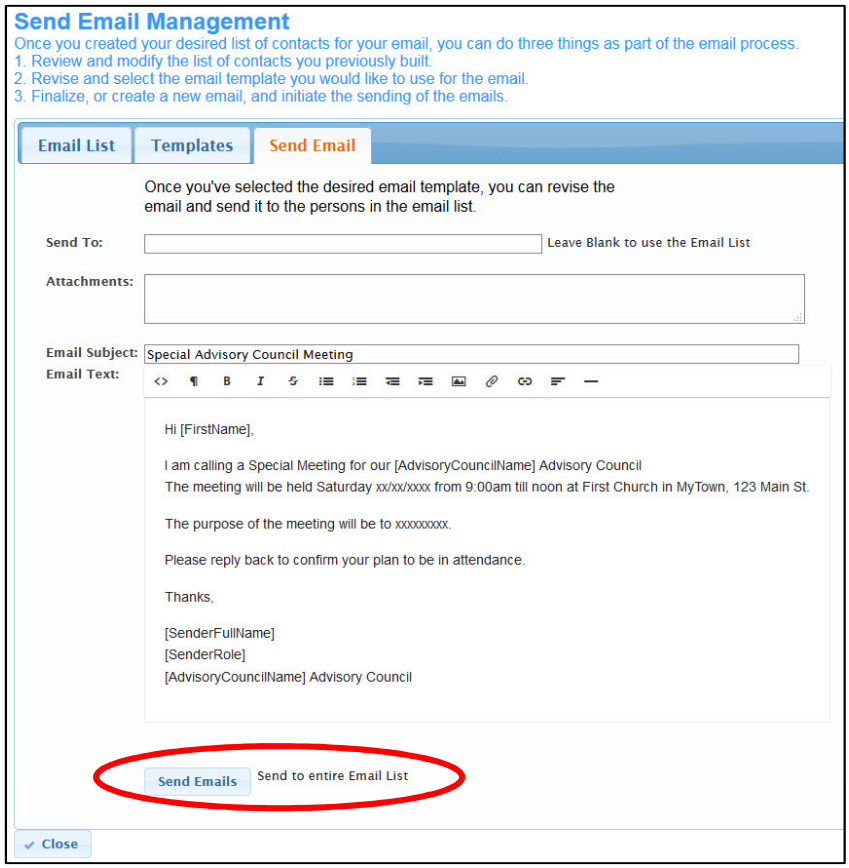
You can attach files by entering the full windows file path in the Attachments

section. Click the button on the right of the Attachments field to allow you to navigate to the file you want to attach.

Sending the Email

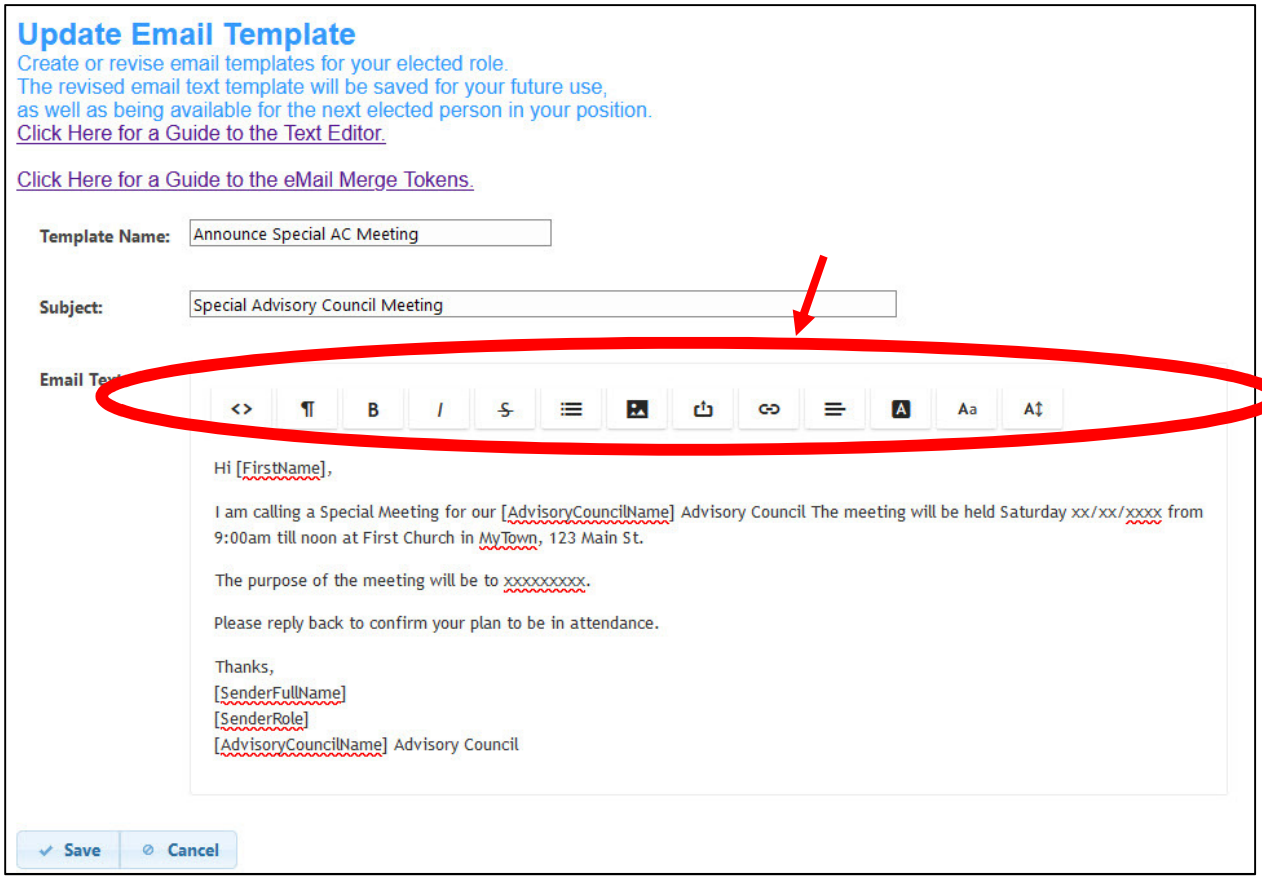
To begin the email sending process, click the Send Emails button at the bottom of the Send Emails tab. This will initiate the emailing of the individual emails (one email for each person on your List) and will customize each individual email as appropriate based on the Merge Tokens.

When you click the Send Emails button, a progress bar will appear to give you feedback on the progress of the emailing. When the emailing is completed, you will get a screen confirming the completion and telling you how many emails were sent and how many were in error. See the section on Email Delivery Issues for more information on errors.

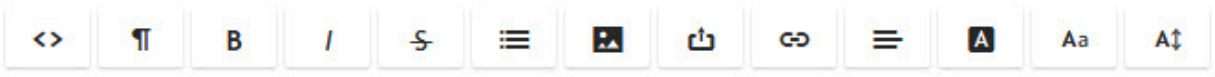


VII. Email Editor

KairosMail incorporates a built in "HTML" editor for your email text. You use this editor to tailor your email text as you desire for professional and practical email content that is compatible for email documents.

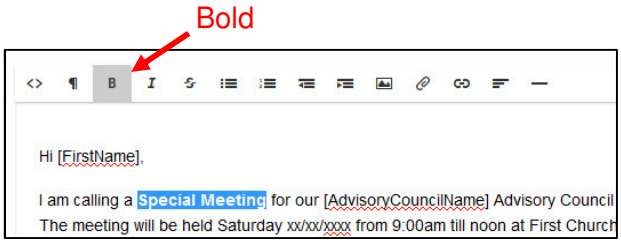


You tailor your text by using the icon buttons at the top of the email text field. If you are not sure what a particular icon button does, simply place the mouse over the icon to get a short title for the button.



Applying an "effect"

In general, you will be applying an effect to as section of text that you have highlighted. Then you will click the desired feature button as illustrated in the following feature section.

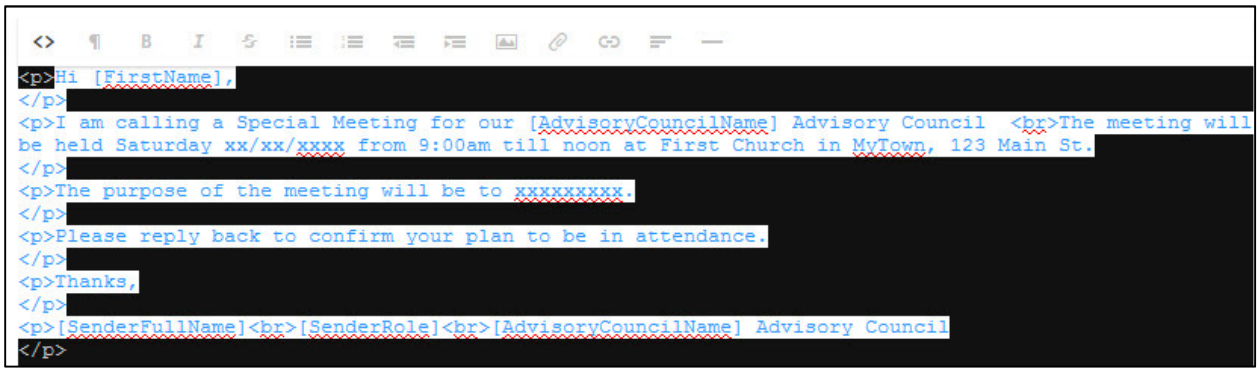


Available Effects

The following effects are available at this time. Additional effects may be added from time to time.

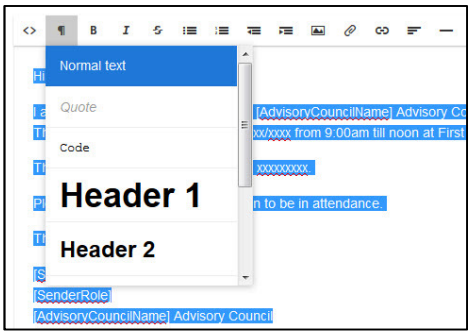
HTML

The HTML feature is rarely used except by more technical users. It will show you the underlying (hidden) coding that is "internet compatible" that results in the formatting that we see in the finished document.



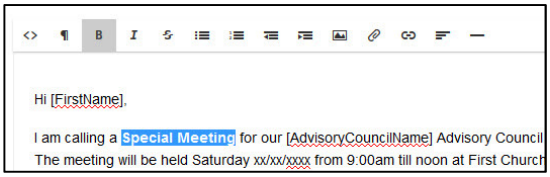
Formatting

The Formatting feature will apply a range of text characteristics in terms of effects like size and bolding to your selected text.



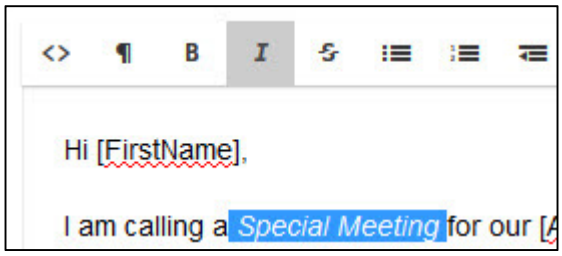
Bold

The bold feature will bold your selected text.



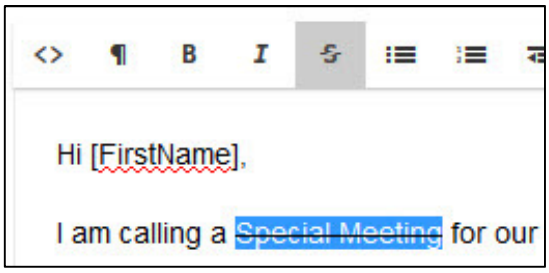
Italic

The italic feature will italicize your select text.



Delete Text

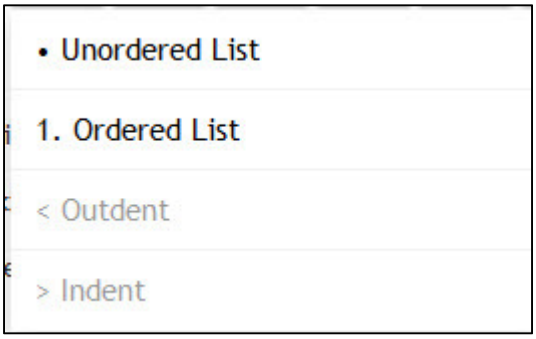
The Delete Text feature marks the selected text with a line to indicate that the text should be deleted. It does not actually delete any of the text.



Lists

This feature will set an ordered or unordered list format to your selected text. You will get an option screen and the Unordered selection places a dot in front of the list items and the Ordered selection places an incrementing number in front of the list items.

If you made the list selection, you optionally can indent (to the right) or Outdent (to the left) your selected text.



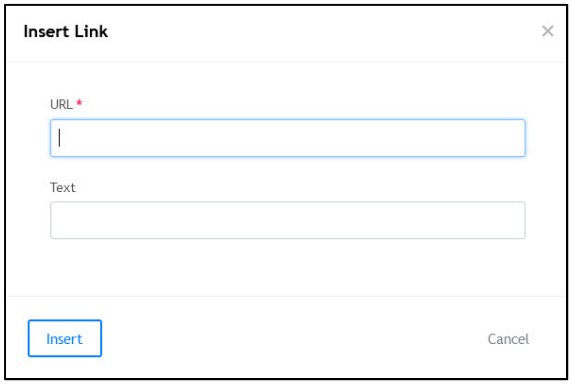
Insert Image

This feature will allow you to insert an image into the document at the location of your cursor. You will receive a selection navigation screen whereby you can either drag and drop the image or file or you can click to navigate to the desired image.

Insert File Contents

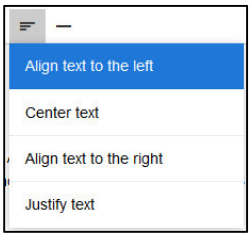
This feature will allow you to insert the text from a file into the document at the location of your cursor. You will receive a selection screen whereby you can either drag and drop the text file or you can click to navigate to the desired file.

This is NOT the mechanism to attach a file to your emailed document.



Link

This feature allows you to insert a clickable link in the email text. You will need have the complete web address (URL) of where the link is to go, and a displayable text that the user will click on.



Align

This feature will align your selected text according to your selection from the drop down list that appears when you click the Align button.

Font Color

This feature will allow you to set or change the color of the font of the selected text.

Font

This feature will allow you to set or change the color of the font of the selected text.

Font Size

This feature will allow you to set or change the font size of the selected text.

VIII. Merge Tokens

KairosMail provides support for eMail merging of data into your email text. For example, if your email text has "Dear [FirstName]," then the email that will be sent will be personalized to the specific person to whom the email is addressed. (ie "Dear John,").

In order to use this feature, your email text has to use a supported "merge token" as listed below. A merge token is identified by surrounding brackets [ ] and the text between the brackets must be as listed here.

[FirstName] – Recipient First Name
[FullName] – Recipient First and Last Name
[AdvisoryCouncilName] – Advisory Council Name of the Logged in Person
[StateName] – State Chapter Name of the Logged in Person
[SenderFirstName] – First Name of the Logged in Person
[SenderFullName] – First and Last Name of the Logged in Person
[SenderLevel] – Organizational Level of the Logged in Person (Advisory Council or State Chapter)
[SenderRole] – Elected position of the logged in Person (ie Advisory Council Chair, Secretary, etc)
[PrisonName] – Name of the supported Prison
[PrisonAddress1] – Mailing Address of the supported Prison
[PrisonAddress2] – City, State Zip of the supported Prison
[PrisonPhone] – Phone number for the supported Prison
[ChaplainFirstName] – First Name of the Chaplain in the supported Prison
[ChaplainLastName] – Last Name of the Chaplain in the supported Prison
[ChaplainFullName] – First and Last Name of the Chaplain in the supported Prison
[WardenFirstName] – First Name of the Warden in the supported Prison
[WardenLastName] – Last Name of the Warden in the supported Prison
[WardenFullName] – First and Last Name of the Warden in the supported Prison
[FacilityName] – Name of a selected Facility (ie church for meetings, camp, hotel)
[FacilityContactFirstName] – First Name of the Primary Contact for the Facility
[FacilityContactFullName] – First and Last Name of the Primary Contact for the Facility
[FacilityAddress1] – Mailing Address of the Facility
[FacilityAddress2] – City, State Zip of the Facility

IX. Recipient Reply

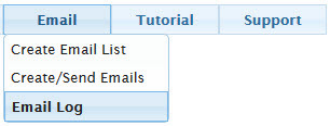
Emails are sent individually from KairosMessenger. In other words, each recipient gets a unique email rather than a copy of single email with a bunch of BCC recipients. And, each email is from the authorized person who sent the email. Normally, the "From" email address is the sending person's own email address. So, if a recipient replies to the email, their reply will go directly to the sender's own email address. It does not go to a KairosMessenger – KairosMail address.

However, in the case where the sender is using an email provider that implemented a "DMARC" policy as described on page 2 of this User Guide, then the "From" address will be something like Secretary@KairosMail.com where "Secretary" is the sending person's elected role. Additionally, the "Reply To" address in the email header will contain the sending person's actual email address. So, if a

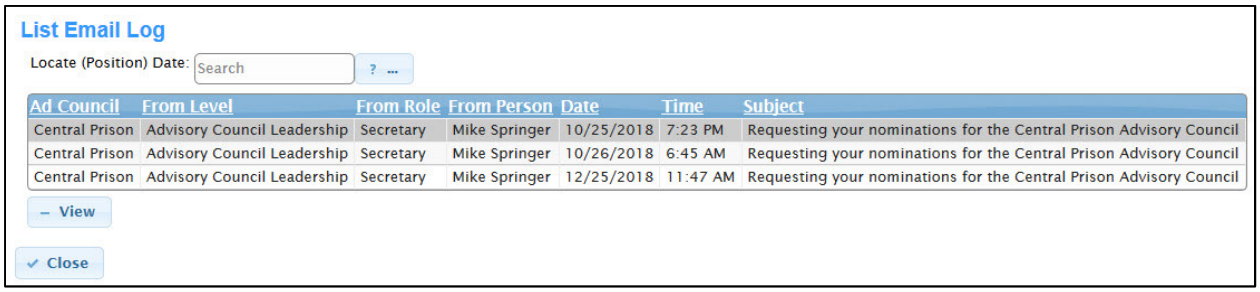
recipient replies to the email, it will go to the "Reply To" address which is the sender's own email address.

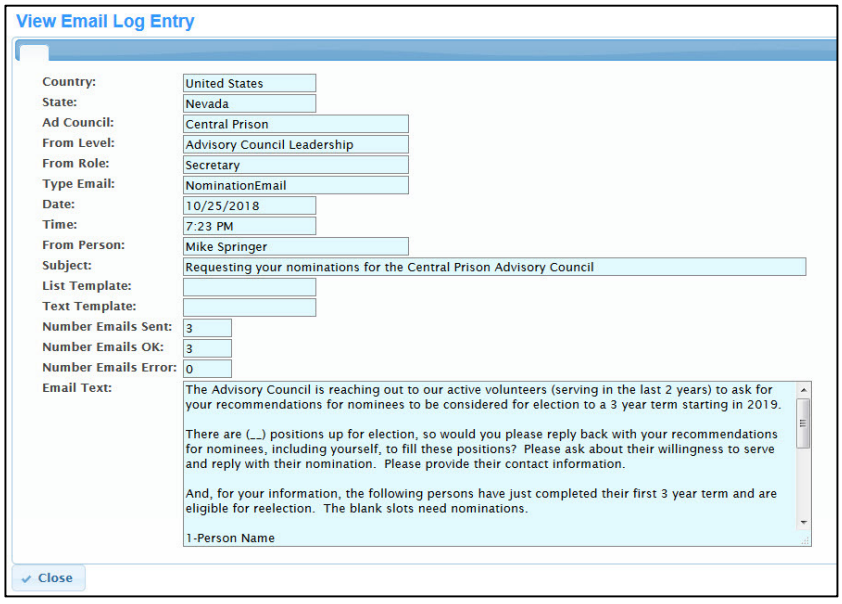
IX. Email Log

The system maintains a log of emails sent for a period of one year. You can access the log of emails sent for your specific authorized role. You access the email log from the Email menu button on the main KairosMessenger page.



This provides you a list of the emails sent. The list is limited to the logged in person's authorized Country, State, and Advisory Council.



You can view the contents of the specific log record by selecting the entry and clicking the View button.

You are allowed to view the log but you may not make changes to the log.