

Class – Help Document



Emailing - SMTP (available from Class - v6.1)

This method was introduced in version 6.1 of Class and sends emails directly to the SMTP or POP3 server.

To implement this “SMTP” option you should first consult with your IT systems engineer who will need to make some adjustments to your system.

Company Settings:

The screenshot shows a window titled "Company" with several tabs: "General", "Finance", "Acc. Payments", "Statement Headings", "File Paths / SMS Text", "Web Access", and "Email". The "Email" tab is selected. A text box contains the following instruction: "When using the SMTP email option, in conjunction with Microsoft Exchange Server, you may need to switch on the 'Allow relay to the local domain' option within the Exchange settings. Instead of specifying the domain name in the Exchange settings, you may wish to consider specifying an IP range instead (i.e 10.0.0.0 to 255.255.255.0). Please contact your IT personnel to check this or contact Infospeed support for further help." Below this text box are the following settings:

- Host Email Type: A dropdown menu with "SMTP" selected.
- SMTP Server: A text box containing "123.123.123".
- SMTP Login Required: An unchecked checkbox.
- Login: A text box.
- Password: A text box.

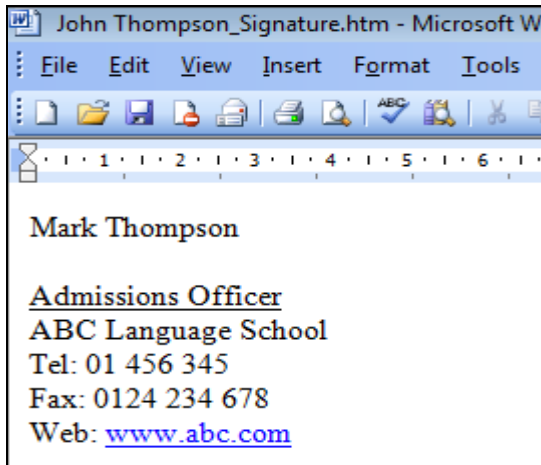
Company User Settings:

The screenshot shows the 'Company User Settings' dialog box for user 'Graham Hacker'. The 'Emailing' tab is selected. The 'Email' section is highlighted with a red box, showing 'E Mail' as 'Grahamhacker@infospec' and 'Display Name' as 'Graham Hacker'. 'E Mail Reply To' is 'support@infospeed.co.uk'. Below are sections for 'Outlook Emailing' (Profile Name, SMTP type) and 'SMTP Emailing' (Server, Login, Password, Signature). A 'Faxing' section is at the bottom.

Depending on whether Outlook or SMTP has been selected in the Company Settings, the fields for completion will change. The above example is for SMTP.

- Email:** Users email address. This must be setup for each user.
- Display Name:** Can be left blank. If completed the display name will prefix the email address when sent out e.g. Mark Thompson [m.thompson@abc.co.uk]. Infospeed Support [support@infospeed.co.uk]
- Email Reply to:** If response is to be sent, other than to the address above (Email), then details for where replies are to be sent need to be entered. For example, emails may go out in a users name but when the recipient “replies” then an alternative address is used.
Example:
 Sent out as: Mark Thompson [m.thompson@abc.co.uk]
 Reply to: admissions@abc.co.uk

Signature: A signature can be appended to an email. However, the signature must not contain graphics (text only). Word is opened and the signature is entered.



AGENTS

For Agents to be emailed, make sure the email address in the General tab of the Agents details is entered. If not entered the user will need to manually add each time an email is requested. Also if a batch email is sent an Agent without an email address will be excluded.

34 AA Japan - Agent

General Finance Details Addresses Students Commissions Statistics Notes

Lookup Name: AA Japan II Code: A Direct Agent:

Name: AA Japan Surname: Wellanxa

Address 1: Sumitomo Midosuji Bldg. 14F Forename: Jane

Address 2: 14-3 Nishitema 4-Chome Title: Miss

Address 3: 1 Addressee: Miss J Wellanxa

Address 4: Position:

Address 5: Country: ...

Postal Code: Status: Active

Telephone: 01202 734363 A/C Balance: £ 264,015.59

Fax: Visited: 01 Dec 1997 By: Ray Atkins

E-Mail: support@infopseed.co.uk Reviewed: 13 Dec 1997 By: ...

Mobile Number: Send SMS:

Mailing code: B Spare: ...

Agent Grade: 1 Spare: 0

Spare: | Spare: 0

Spare: Spare: ...

Spare: T4 Created Date: ...

Agent Account Log.. Documents Texts Contacts OK Cancel

In the 'Addresses' tab, under Addressing set 'Send By' to E-mail.
The affect of doing this is, when documents are requested to be sent they will default to email. The default can always be changed at the time.

Check the Email format is set. The E-mail format chosen is generally irrelevant as this only refers to the email "body" text, which is always text, not graphics.

The screenshot shows the '34 AA Japan - Agent' software interface. The 'Addresses' tab is selected, and the 'Addressing' section is visible. The 'Send By' dropdown menu is circled in red, indicating it is set to 'E-mail'. The 'E-Mail Format' dropdown menu is set to 'MS Word'. The 'Other Address' section contains the following information:

Field	Value
Addressee	Miss J Wellanxa
Address 1	Sumitomo Midosuji Bldg. 14F
Address 2	14-3 Nishitema 4-Chome
Address 3	
Address 4	
Address 5	
Postal Code	
Telephone	01202 734363
Fax	01202 715564
E-Mail	infospeed@lds.co.uk

The 'Addressing' section contains the following information:

Field	Value
Correspondence Language	Not Required
Documents Address	Main
Invoice Address	Main
Send By	E-mail
E-Mail Format	MS Word

The 'Preferences' section contains the following information:

Field	Value
English UK W/shop 2004	
Mailing Group A	
Xmas Card	

The 'Text' button is visible on the right side of the interface. The 'Agent Account', 'Log...', 'Documents', 'Texts', 'Contacts', 'OK', and 'Cancel' buttons are also visible on the right side of the interface.

Students – Input the Email address in the Students General Screen.

69 Miss Yuri Akimine, Student Created 10/Nov/97

General | Enrolments | Addresses | Web | Notes

Surname	Akimine	Forename	Yuri	Title	Miss
Addressee	Miss Y Akimine	Sex	F	Code	1102
Country	Japan	Country of Birth		Language	Japanese
D.O.B.	13 Dec 1970	Corres. Language	Not Required	Profession	
Age	37	Exclude From Trust Accounting ?	<input type="checkbox"/>	A/C Balance	0.00

Address 1	5-5-23 Nishiishiki	E Mail	support@infospeed.co.uk
Address 2	Kagoshima-Shi	Telephone	099-220-5305
Address 3	Kagoshima 891-12	Fax	
Address 4	Japan	Mobile Number	
Address 5		Enquiry Source	
Postal Code		Enquiry Channel	
		Origin as Enquiry	No
		Follow Up On	

Passport Number		Spare	
Pre Arrival Test		Spare #	0
Lang Req'd		Spare #	0
Reason for Study		Spare date	
Way to Finance		Spare date	

User Defined:

Text

Web Booking

Student Account

Statement

Log...

Picture

Documents

Texts

Contacts

OK

Cancel

In the Addressing section set 'Send By' to E-mail. Check the E-mail Format

69 Miss Yuri Akimine, Student Created 10/Nov/97

General | Enrolments | Addresses | Web | Notes

Statement Address		Other Address	
Addressee	Miss Y Akimine	Addressee	Miss Y Akimine
Address 1	5-5-23 Nishiishiki	Address 1	5-5-23 Nishiishiki
Address 2	Kagoshima-Shi	Address 2	Kagoshima-Shi
Address 3	Kagoshima 891-12	Address 3	Kagoshima 891-12
Address 4	Japan	Address 4	Japan
Address 5		Address 5	
Postal Code		Postal Code	
Telephone	099-220-5305	Telephone	099-220-5305
Fax		Fax	
E Mail		E Mail	

Addressing		Preferences	
Documents Address	Main	<div style="border: 1px solid gray; width: 100%; height: 50px;"></div> <p style="text-align: right;">Add Delete</p>	
Invoice Address	Main		
Send By	E-mail		
E-Mail Format	MS Word		

Text

Web Booking

Student Account

Statement

Log...

Picture

Documents

Texts

Contacts

OK

Cancel

Host Families – Input the Email address in the Accommodation General screen.

9 Ms Linda Armstrong - Accommodation

General | Prefs/Rooms | Students | Banking | Other Address | Notes

Surname: Armstrong Forename: Linda Title: Ms

Address 1: 172 Saxonbury Road Code: 303

Address 2: Charminster Addressee: Ms L Armstrong

Address 3: Bournemouth Salutation (Position):

Address 4: Dorset Corres. Language: Default Language

Address 5: test Status: Active

Postal Code: BH6 5ND Type: Host Family

Telephone: 4266712 Reviewed: 05 Jun 1997

Fax: Pay Accommodation: Hold Payments:

E Mail: support@infospeed.co.uk

Mobile Number: Send SMS:

Work Tel: 11 F: Mobile Tel: aaaaaa D: E:

Log... Documents Texts Contacts Unavailable Payments OK Cancel

In Other Addresses set the 'Send by' to E-mail. Check the Email Format is set.

9 Ms Linda Armstrong - Accommodation

General | Prefs/Rooms | Students | Banking | Other Address | Notes

Other Address

Addressee: Ms L Armstrong

Address 1: 172 Saxonbury Road

Address 2: Charminster

Address 3: Bournemouth

Address 4: Postal Code: BH6 5ND

Telephone: 4266712

Fax: E Mail:

Addressing

Main Address: Main

Send By: E-mail

E-Mail Format: Rich Text Format

Log... Documents Texts Contacts Unavailable Payments OK Cancel

Sending an Email:

When sending an email via the Documents screen in Class the following screen will be displayed.

The screenshot shows the 'Emailing - SMTP Email Edit' window. The 'To' field is populated with 'support@infospeed.co.uk'. Below it are fields for 'Additional Recipients', 'CC', and 'BCC', each with 'Add' and 'Remove' buttons. The 'Subject' field contains '#1265 - - Agent Confmn - Crse Acc Trans - Acc Later'. The 'Body' field contains the text: 'Please find attached a file called 'Agent Confmn - Crse Acc Trans - Acc Later_2360'. If you have not received this file or are having problems in reading it, please respond to the senders e-mail address.' Below the body is a list of 'Class Documents (Merged)' with two entries: '/Enrolment Memo - [10/Jan/08]' and '/Maltese VAT - [10/Jan/08]', each with an unchecked checkbox. At the bottom, there is an 'Additional Attachments' section with 'Add' and 'Remove' buttons, and 'Send' and 'Cancel' buttons on the right.

Multiple documents can be attached to one email. However, the documents must be 'Processed' first. In the screen above you can see that only the two processed documents are available to be attached. Tick the box to attach the documents.

Subject	Addressee	Method	Processed	User
#1265 - - Certificate of Enrolment	Miss J Wellanxa	E Mail		JoanneArnold
/Enrolment Memo -	Miss J Wellanxa	E Mail	10/Jan/08	JoanneArnold
/Maltese VAT -	Miss J Wellanxa	E Mail	10/Jan/08	JoanneArnold

The screenshot shows a window titled '1265 Ms Rosa LAL, F, 0, CZE, 02/Dec/07 - 05/Apr/08 - Documents (1445)'. It contains a table with the following data:

Documents outside of Class can also be attached by using 'Add' under the Additional Attachments section of the email screen.

Note: Although Class has the facility to email multiple attachments please be aware that not all recipients email boxes have the space to receive emails if the size exceeds their mail box capacity.