

Time and Talents Communications Overview

The What, When, Where and Why of System Notices

Set the System Email Reply To Address:

Click **[Manage Staff]** >

Order the list of admins by adding 01. or 02. , etc. before each name. >

Adjust one at a time and click **[Save]** after each change.

Notes: The username of first admin in the list with 'Gen' set to **[Yes]** will be used as the Reply To: email address for all outbound email except in reporting where you may use any address you choose. Admins with the Join column set to **[Yes]** will receive an email copy of new member applications to alert them of the submissions.

The New Member Process

Potential new members fill out the join form and **[Submit Application]**. >

Upon a successful submission they see the message, "Your Application and Reference Forms Have Been Sent!" >

Notes: Admins with the Join column set to **[Yes]** in the **[Manage Staff]** area will receive an email copy of the application to alert them of the submission.

If the potential member provided an email address for a reference, a Reference Request letter is sent. This letter may be edited in **[System Notices]** > 'Join Form' along with the instructions that appear on the join form. Some new members may print the reference letter(s) from the join form, and bring in the hard copy(ies).

When an admin clicks **[Add as Member]** in the **[View Applicants]** area:

- A. The new member's profile is setup.
- B. The services they might offer are copied to the Admin Notes area.
- C. Their reference information is copied to the Admin Notes area.
- D. The member is emailed a welcome letter which may be edited in

[System Notices] > 'View Applicants'

E. The new member's account is set to Inactive Member = **[Yes]** so admins may schedule an orientation and follow up on references.

They should also make sure the services the member wants to offer exist in the **[Manage Services]** area.

Notes: The email address/username the new member provides is used for both their Email1 address in the **[Contact]** area, and as their username. Only the address listed in the Email1 slot in their **[Contact]** area will be used as a Send To: address. The username could be a fake email as long as it is unique. The Email1 address, if it exists, **must be a working address** or we get bounces!

If a new or existing member tries to login when their account is set to inactive they will see an onscreen message that may be edited in **[System Notices]** > My Account Message.

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Member or Admin Password Reset

If a user has forgotten their password they may click 'Can't Login?', on the login page, enter their username and click [**Send**] and a new password will be emailed to them. (In this case username must be a working email address or else an admin will have to reset their password for them.)

Email the Offers and Requests Directories

Admin Side: Click [**Search Offers**] or [**Search Requests**]. >
Click [**Browse Offers Directory**] or [**Browse Requests Directory**]. >
Click [**Email Spreadsheet**] to (change the pre-populated address if needed)

Member Side: Click [**Offers**] or [**Requests**] on the menu bar. >
Click [**Browse Service Offers**] or [**Browse Service Requests**]. >
Click [**Email Spreadsheet**] to (change the pre-populated address if needed)

Notes: You may also use [**Reporting**] to create 'Services Offered by Service' and 'Services Offered by Member' lists.

Email Selected Members using Reporting

Click [**Reporting**]. >
Select 'Email List'. >
Set the criteria for the members you want to contact, like Member Type = Individual and Active? = Active. >
Click [**Update**]. >
Click [**Print Preview**]. >
Click [**Email These Members**]. >
Fill in the email form and click [Submit]. (All your members will be blind copied.)

Notes: You may use 'Email Report To' [*your_email_address*] [**Send**] to email the comma delimited list for uploading to Mail Chimp or Constant Contact.

Manage Annual Member Donations

In the [**Organization Info**] area, if either 'Annual Donation Hours' or 'Annual Donation Dollars' are non-zero the accounts receivable system is turned on.

Members are automatically emailed a letter asking them for their annual donation of dollars (if any) and explaining their account has been debited (x) hours (if any) on the anniversary of their join date. It is important that the join date not be blank or '00/00/0000'.

Members are added to the [**Reporting**] > 'Accounts Receivable' queue as they are notified. That notice may be edited in [**System Notices**] > My Account Message.

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If you have an internet payment service like PayPal we can embed your Donate button code in the notice members see when they login (the same notice they are emailed.).

To mark a member paid click [**Reporting**] > 'Accounts Receivable'. >

Locate the member on the list and click [**Mark Paid \$xx**]

OR click [**Charge Additional Hours (x)**]

In either case the member is emailed a Thank You! letter which may be edited in the in [**System Notices**] > My Account Message area.

Contact Your Coordinator

Members may email their coordinator (at the System Reply To: address) by clicking the [**Contact Your Coordinator**] button at the bottom of any page on the member side (once they are logged in).

Contact Tech Support

Members may contact technical support by clicking [**Contact Tech Support**] at the bottom of any page (once they are logged in).

Coordinators may contact technical support by clicking [**Contact Support**] in the menu bar on the admin side (once they are logged in).

Report Hours Admin Side

When an administrator reports a service exchange on behalf of members both parties will receive an email recounting the details of the transaction. For now this message is hard coded and may not be edited. The same message they are emailed is also posted to the Member to Member tab in the member side My News and Messaging area.

Report Hours Member Side

When a member (provider or receiver) reports a service exchange the non-reporting member will receive an email recounting the details of the transaction. For now this message is hard coded and may not be edited. The same message is also posted to the Member to Member tab in the member side My News and Messaging area.

Reply to an 'Admin to all Admins' Message

When you reply to a message in the Admin News and Messaging area, all of the admins in the thread you are responding to including the creator and you, will receive an email copy of the whole thread. The expiration of the thread will be moved to 14 days after the last reply.

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Reply to a Member Side Message

When you reply to a message in the My News and Messaging area all of the members in the thread you are responding to including the creator and you, will receive an email copy of the whole thread. The expiration of the thread will be moved to 14 days after the last reply.

Automatic Weekly Updates of Messages, Offers and Requests

The system will email your entire active membership a recap of new Member to Exchange Messages, Offers and Requests each week. Members may opt out by clicking Send Weekly Updates [Yes] to change it to [No]. Admins may change the setting from the admin side as well via [Manage Members]. Offers and Requests that don't contain a service description will not be included in the email.

Email a Report

Any report created in the [Reporting] area may be emailed to any address. The report will arrive as a *.csv (comma delimited file) email attachment along with a recap of the parameters selected to create the report.

Email a Single Member

Anywhere in the system you see either a valid email address or "Message Me" both admins and members may click on the address to bring up a secure email form from which they may contact that member. On the admin side using [Manage Members] there is an [Email Member] button on the member's 'Profile' page.