Communications Module
Set-up Guide

Thank you for adding the communications module to your system. Now it's added, you need to set it up before you can start using it.

The communications module lets you send and log communications through Lamplight.

- Email is set up to send through your own email servers, meaning you see the sent email in your 'Sent' email folder, and replies come directly to your email.
- You can send mail-merged and non mail-merged letters, emails and mailing labels from any group, work record or profile in the system.
- You can use templates to set up standard mail-merged communications.
- You can also buy SMS credits to send text messages directly from Lamplight.

To set-up communications, you'll need to have a System Administrator role. You can see your role in the system directly to the right of your name at the top of the screen.

Go to the System Administration menu, by clicking on 'Admin' in the main menu, and then choosing 'System Administration' in the menu bar itself.

Setting Up Your Email

Setting up your email is relatively simple, and we have a separate guide to support you to do this step by step. We suggest you do this first, and then follow the rest of this guide.

Global Settings

From the System Admin page, locate the section called 'Customise Lamplight' and choose the option called 'Change global settings'. From this page, choose tab 6, 'Communications'.

Customise Lamplight

change global settings

add or change your organisation logo

Here you have several options which allow you to change communications settings for all operators in your Lamplight database.

Default reply-to email address	This will set the same reply to email address for all users, overriding the email address you chose when you set up the email servers.
Default reply-to mobile number (for SMS)	Lamplight can be used to send text messages, but it doesn't receive them back. You can nominate a mobile number to receive replies.
Allow international mobile phone numbers?	Choose whether you can send messages to international mobiles, which will have cost implications.
Staff member to receive unsubscribe notifications	Every email sent out will have an unsubscribe link. This notifies you if the person you are sending to does not want to receive such communications in the future. It is important that these responses come to an email address which will be regularly monitored.
Include your signature automatically at the bottom of new communications?	Every database operator can set a personal email signature for emails. They can add it manually as they choose, or you can select this option to add it automatically.
Show date and work area on communications?	This will automatically append the date and work area to your communication.

Add a Task tab to communications?	Lets you easily add a task when sending a communication.
Default address block/text to use when creating mailing labels:	When you send mailing labels, these will be the default merge options used.
Default mailing label size	Choose the type and size of labels you most commonly use. This will then be the default, although you can still change it when you are setting up your mailing labels.

Communications Settings

In the System Administration page, locate the section called 'Manage communication settings'.

You'll see several options here.

The options:

Set up sending all Lamplight email via a single email account

Enter settings for staff members to send email via their own email account

These relate to setting up your email system to work with Lamplight. Follow the 'Setting up your email' guide to set-up these areas.
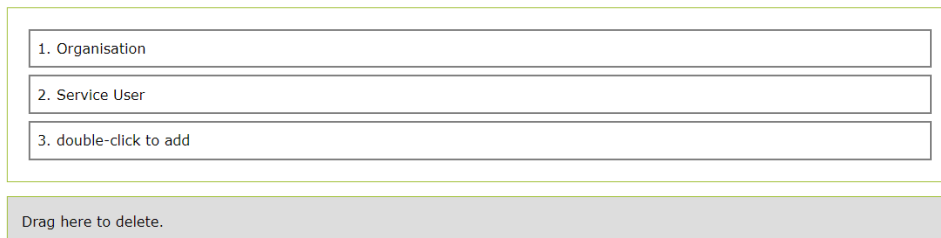
Go to the library

The library allows you to upload images which you can then use in your communications and communications templates. Follow this link and use the

'Add library item' button on the left of the screen to add images. Please make sure that your image is the size that you will want to use before you upload it.

Edit communication roles

Manage communication roles

1. Organisation
2. Service User
3. double-click to add

Drag here to delete.

Within Lamplight you can identify the different roles people play. For the most part people will either be a Service User or an Organisation. You can add roles in this list though, and they will appear as options in the 'Recipients' tab when sending a communication.

Editing an Option

You can edit an existing option simply by double clicking on the text. So, for example, if your first category says 'Stationery, double click on the text 'Stationery', and it will change to a text box to allow you to edit it. Once you're done editing, simply click 'enter' on your keyboard and you'll see it save.

Adding a New Option

The final option in the list will always be called 'double click to add'. By double clicking on this text, in the same way as above, you'll open a blank box where you can enter your new category. Save this by pressing enter, and you'll see the 'double click to add' option appear again at the bottom of the list.

Changing the List Order

You can change the order of the list by dragging and dropping. Left click and hold the item you wish to move and drag it with your mouse to its new position. You'll see the other options adjust to make space for it. Once it's in the correct place, release the mouse button.

Deleting a List Item

Underneath your list of options, you'll see a grey rectangle, with 'Drag here to delete' written in it. If you want to remove a list item, you can simply click and

drag as above, this time dragging it over the grey box. When you let go, you'll see the option you deleted appear in the grey box, confirming it's deleting.

It's not possible to delete an option you've just created without first leaving the page and coming back in again. If you receive a message saying 'Unable to delete item', simply go back to the System Admin page through the menu and enter the page again. You'll now be able to delete it.

Edit types of Logged Communications

If a communication comes in to you, you can choose to record it in Lamplight as a logged communication. When entering the record, you can choose what type of communication it is. This list, allows you to add, edit and remove different types of communication. See the previous section for how to amend or add to a list.

Add, Edit and Remove Communication Templates

This page allows to you add mail merge templates for use with emails, letters, and mailing labels.

When you log in for the first time, you will see two templates already set up. It's important not to delete these, as you need at least one template here in order to add others.

To add a new template, either click on the menu to the left of the top row of the template table (it is the small, square box), or right click in any row of the table. Choose 'Add new' to add a new template, and a dialogue box will appear.

Give your template a name, and a short description.
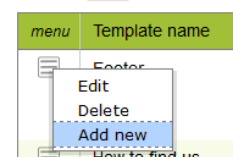
Once you've chosen your options, you can enter the content of your template. At the top right of the large text entry area, is a small + symbol. Click on this symbol to show all the editing controls.

Text:
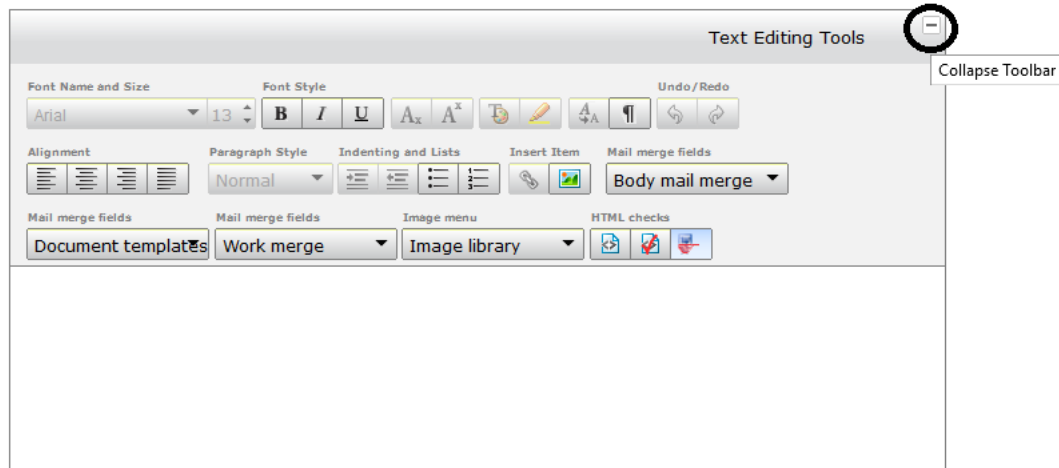
Start by entering your text as you normally would. If you are copying it in, we suggest pasting as plain text, either by using the Ctrl, Shift & V keyboard shortcut in windows. Alternatively, you can copy your text into Notepad first and then from there into the template box. You can add your merge fields at this point too (see below).

You can now add in images you uploaded into the Library, using the 'Image library' drop down to select them. Once you've added an image, you can justify it on the page by selecting it with your mouse and using the text justification buttons. You can also add an image using the small image button under the 'Insert' item section of the rich text editor. This will allow you to add the URL of an image stored elsewhere on the internet (but not your computer).

Once your text and images are in place, you can format your communication using the formatting options at the top of the text box, as in any document editor.

Merge Fields in a Template

In the same way as in any office package, you can use mail-merge templates to merge information you hold within Lamplight into your communication. There are:

Mail Merge Field: About People or Organisations

The 'Body mail merge' drop down field contains all the merge fields you can use for people and organisations. When creating a template, ensure you only select options that are relevant to that template. For example, were you to use fields relating to a volunteer in a template to partner organisations, these fields would be empty when merged as this information does not exist for an organisation.

Simply select the merge item you want from the drop-down list and use it in the text, as you would to normal content.

For example, I can write 'Dear {{First name}}, by typing 'Dear ', and then selecting 'Body Mail merge > Contact details > First Name' from the drop-down menu. When you use this template to send a communication, 'First name' will be replaced by the name of each person you send your communication to.

If any of your recipients doesn't have information in the field you used, the system will leave a single blank space.

Merging: Happen

If you choose 'Communicate' from the menu of any activity type record, such as a work record, you'll also see the option for 'Happen merge'. This allows you to use mail merge fields from the activity itself. These are used in the same way as the ones described above.

Document Templates

If there is a template already set up that you would like to use as part of your new communication template, you can choose it from the 'Document templates' drop-down menu. They will be inserted wherever your cursor is currently placed in the box. This means you can set up partial templates to use in conjunction with others.

HTML

If you are creating an email, you can also view the email in the HTML code and run an HTML check. We recommend only using this if you have an understanding of HTML.

You'll find these buttons in the rich text editor, under the title 'HTML Checks'.

The first button lets you edit the HTML content of your message directly.

The second button checks the HTML you have entered and filters it if necessary. This filtering happens when you send/create the message, so clicking this button lets you double-check the content. It's worth doing this after pasting in text from Microsoft programs to check whether your message will look OK. In some cases, where there is an issue with the Microsoft formatting, your message will corrupt or even seem to disappear. If this happens you'll need to delete the content of your message and then click the third button which switches the MS filter on or off.

When this is unclicked (it's on by default) the editor won't run the filters and whatever you paste will be sent as it is. This should be OK for emails, but it is very likely to cause problems if you are creating letters. Lamplight translates HTML into Rich Text Format documents but expects valid HTML to convert (which Microsoft code isn't). If you need to send an unfiltered email, you may want to send a test first.

Saving and testing

Once you have completed your template, use the 'Save' button in the bottom right to save your template. You can now try using it and testing the formatting before coming back to make any additional changes.

Editing or deleting a template

When in the 'Manage communication templates' page, you can edit or delete any template by choosing the appropriate menu option. Click on the menu (the small grey box with lines in) on the left of each row, or right clicking in the relevant row. This will open the same dialogue box as we've been using to create a template. This will not affect any communications already sent with that template.

Text Messages

Please note if you wish to add text message functionality to your system, bundles of credits can be purchased separately and would then be enabled on your system. Please see our website for details of pricing for these: http://www.lamplightdb.co.uk/additional-services/