



Schedule Recurring Email

User's Manual

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Welcome

Thank you for choosing the Schedule Recurring Email Add-in, created by Sperry Software. This Add-in allows you to automatically schedule and send repetitive emails at intervals that you specify. Send reminders about upcoming events like sports practices, monthly board meetings, or group or civic meetings.

You can view your entire list of pending events at a glance, attach a file or even a folder to the message. When a recurring email is sent, all files in the attached folder are selected as attachments and sent to the email address(es) specified when you created the template.

Note: Attachment(s) are fetched at the time the email is sent, so if file changes are occurring on a regular basis, the most recent copies will be picked up and delivered. This feature is perfect for sending the same changing files at regular intervals.

If you quit Outlook, the recurring emails will not go out. However, when you restart Outlook, you will be prompted for permission to send the emails that should have gone out. You can choose to send them or not (by choosing Yes or No), and you can also apply your decision to the rest of the pending recurring emails (by choosing “Yes To All” or “No To All”).

Configuring the Add-in

Once the installation is complete, you are ready to use Schedule Recurring Email. When you open Outlook you will notice a new tab: “Sperry Software” is added to the Ribbon.

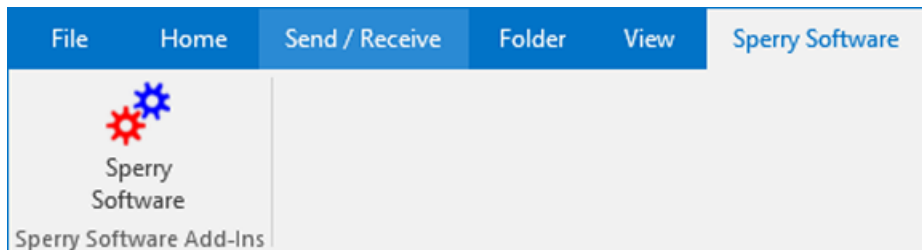


Figure 1 (Outlook 2016 Sperry Software Add-ins tab)

Clicking this button displays the Sperry Software Add-ins configuration screen. It is on this screen that settings are made to control the add-in’s functionality.

Configure Recurring Emails Tab

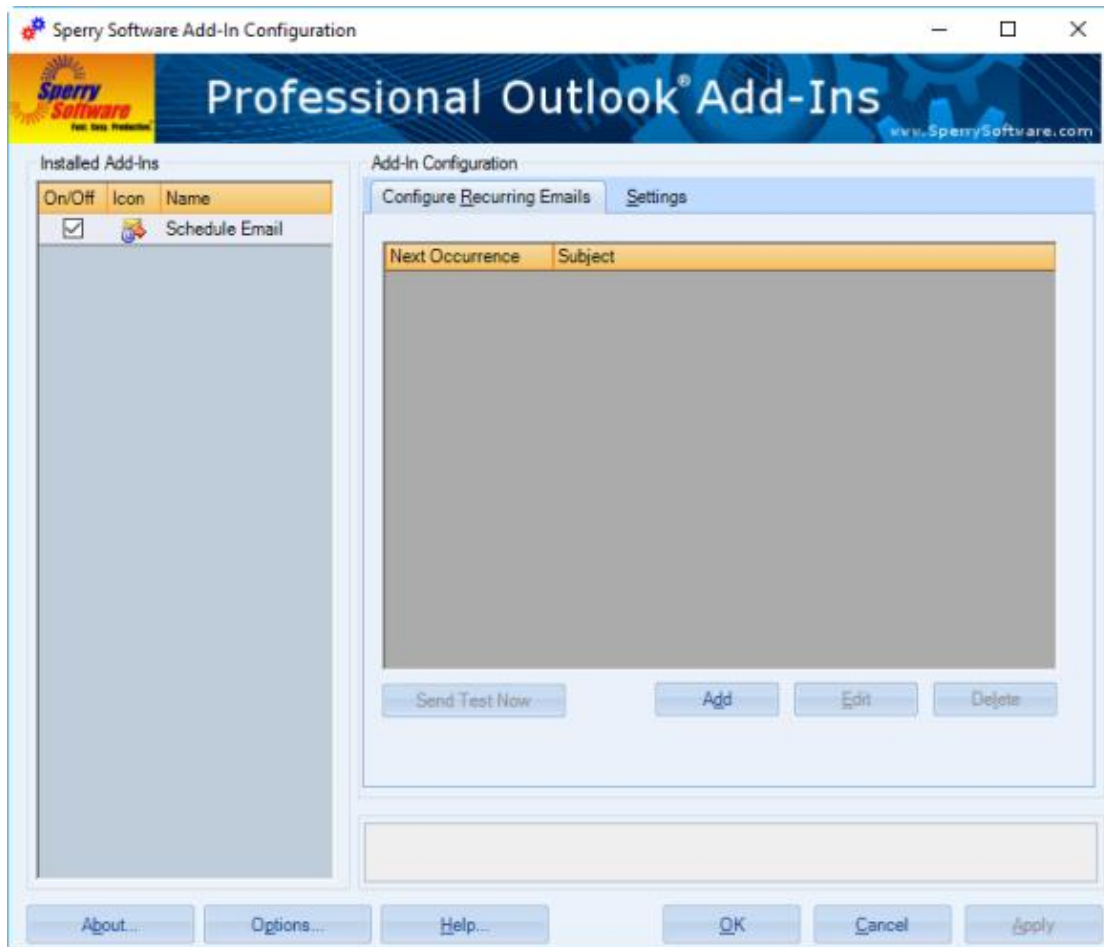


Figure 2 (Empty list of recurring emails)

This tab displays the list of existing Recurring Email templates and provides access to the Recurring Email Editor. To create a new Recurring Email, click “Add”. To edit or delete an existing Recurring Email, select the desired template on the list, then click “Edit” or “Delete” as appropriate.

You can add as many recurring emails as you like; you can schedule multiple recurring emails, however the finest granularity between emails is 5 minutes, by default – you can change this in the Settings tab, but more on that later.

For now, let’s create a test email that is designed to go out on a daily basis at the same time each day.

How to Create a New Recurring Email

- Start Outlook
- Click on **Sperry Software Add-in tab** on the Ribbon
- Verify that **Schedule Email** is selected (click the checkbox if it is *not* selected)
- Click on **Add**

- Click on the Create/Edit Template Button at the top of the **Configure a Recurring Email** window.

Configure a Recurring Email

Email Template to be Sent

Subject:

Create/Edit Template... Choose Existing Template...

Starting Date/Time

Starting date for the email: 1/12/2017 Time for the email to go out: 8:22:02 AM

Repeat Interval

Daily Weekly Monthly Yearly Hourly Random Dates

Email repeats on a daily basis

Email occurs every 1 day(s)

Email occurs every weekday

Ending Date

No End Date End Date: 1/12/2017 End after [] occurrences

Options

Always send these files as attachments:

Choose File...

Always send all files in this folder:

Choose Folder...

Only send if the file(s) exists

Delete the file(s) after sending

Display email before sending

OK Cancel

Figure 3 (Configure a Recurring Email dialog box)

Click the **Create/Edit Template button** in the Email Template to be Sent area at the top of the dialog box.

- The following warning box displays:

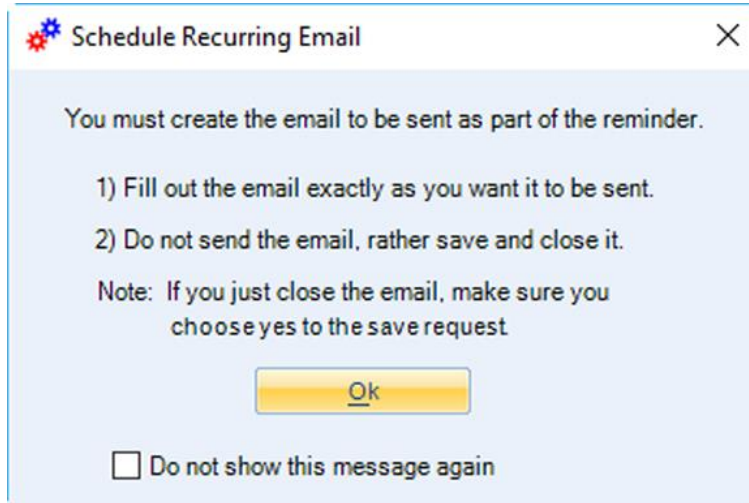


Figure 4 (Schedule Recurring Email warning box)

- Click **OK, a new blank message window opens**
 - Create new message as you normally would

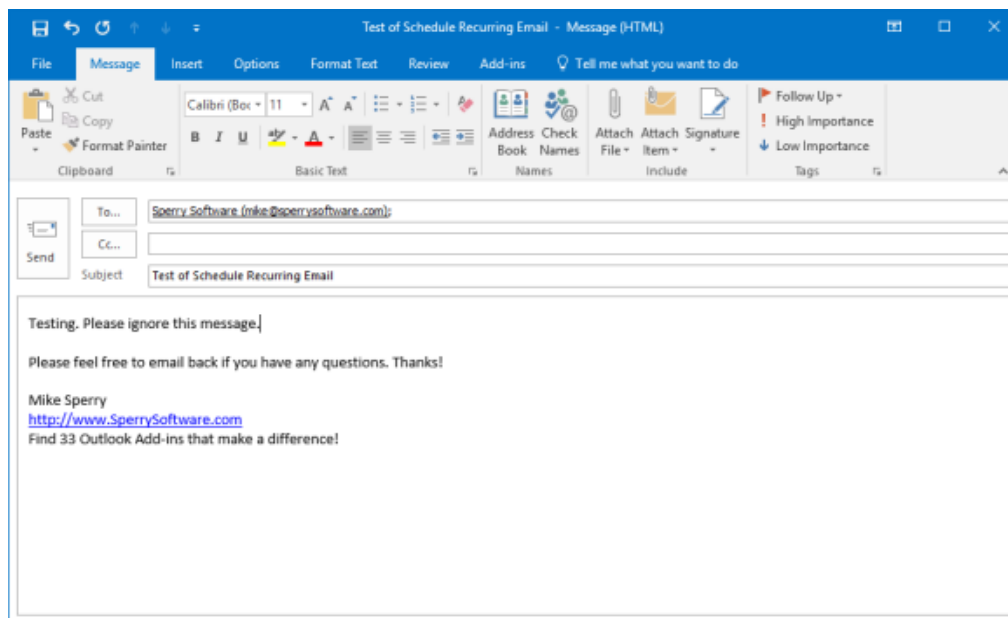


Figure 5 (Test of Schedule Recurring Email window)

- Click the **“X” in the upper right** as shown above

- Click “Yes” to save your message

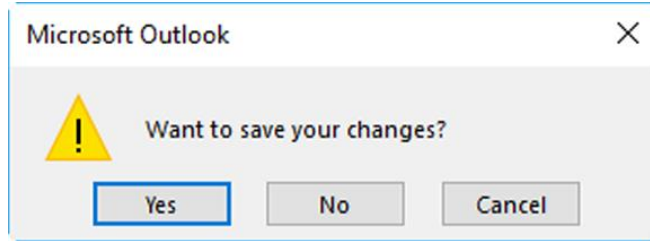


Figure 6 (Outlook warning box)

Choose a schedule for the email

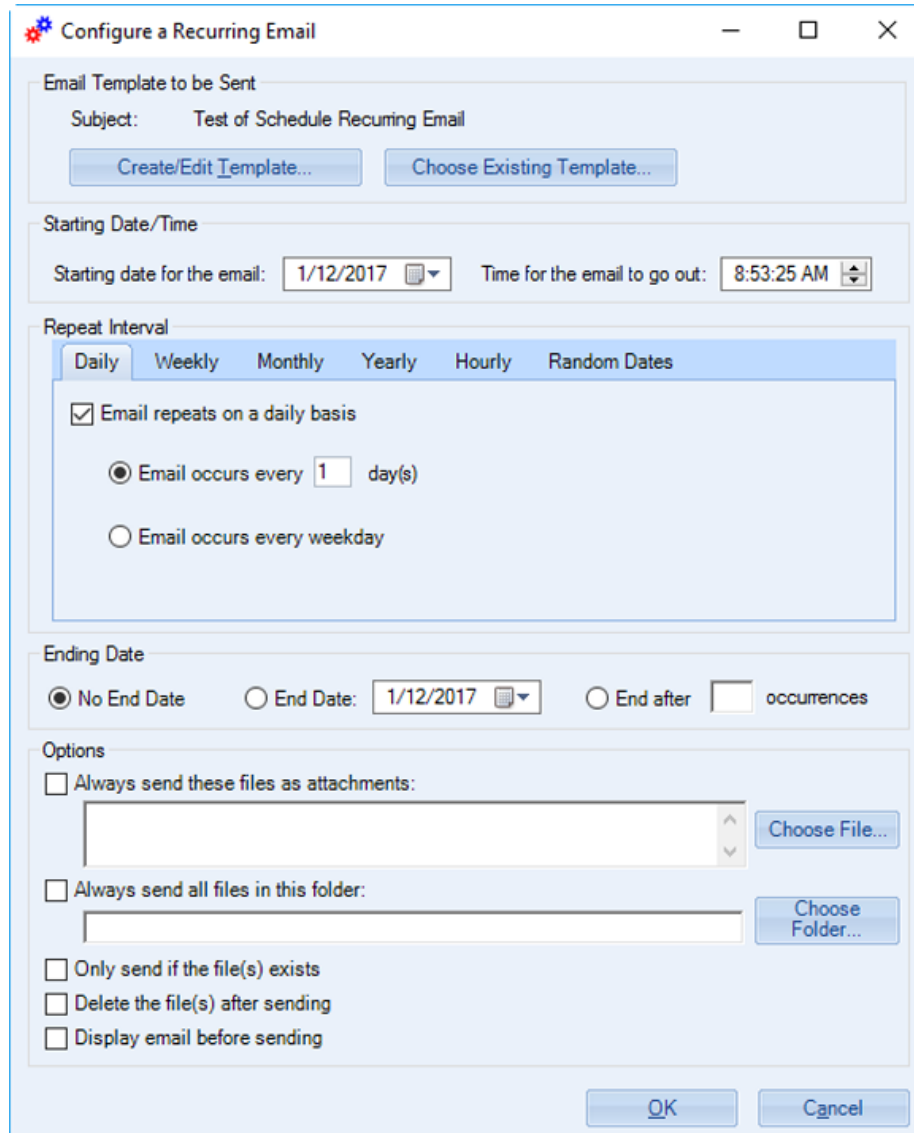


Figure 7 (Configure a Recurring Email dialog box)

- Be sure to include the repeat interval, date, and time to send email

- You can choose from the following options: “**Always send these files as attachments**”, “**Always send all files in this folder**”, “**Only send if the file(s) exists**”, “**Delete the file(s) after sending**”, or “**Display email before sending**”
- Click **OK** and the recurring message will be added to the main list

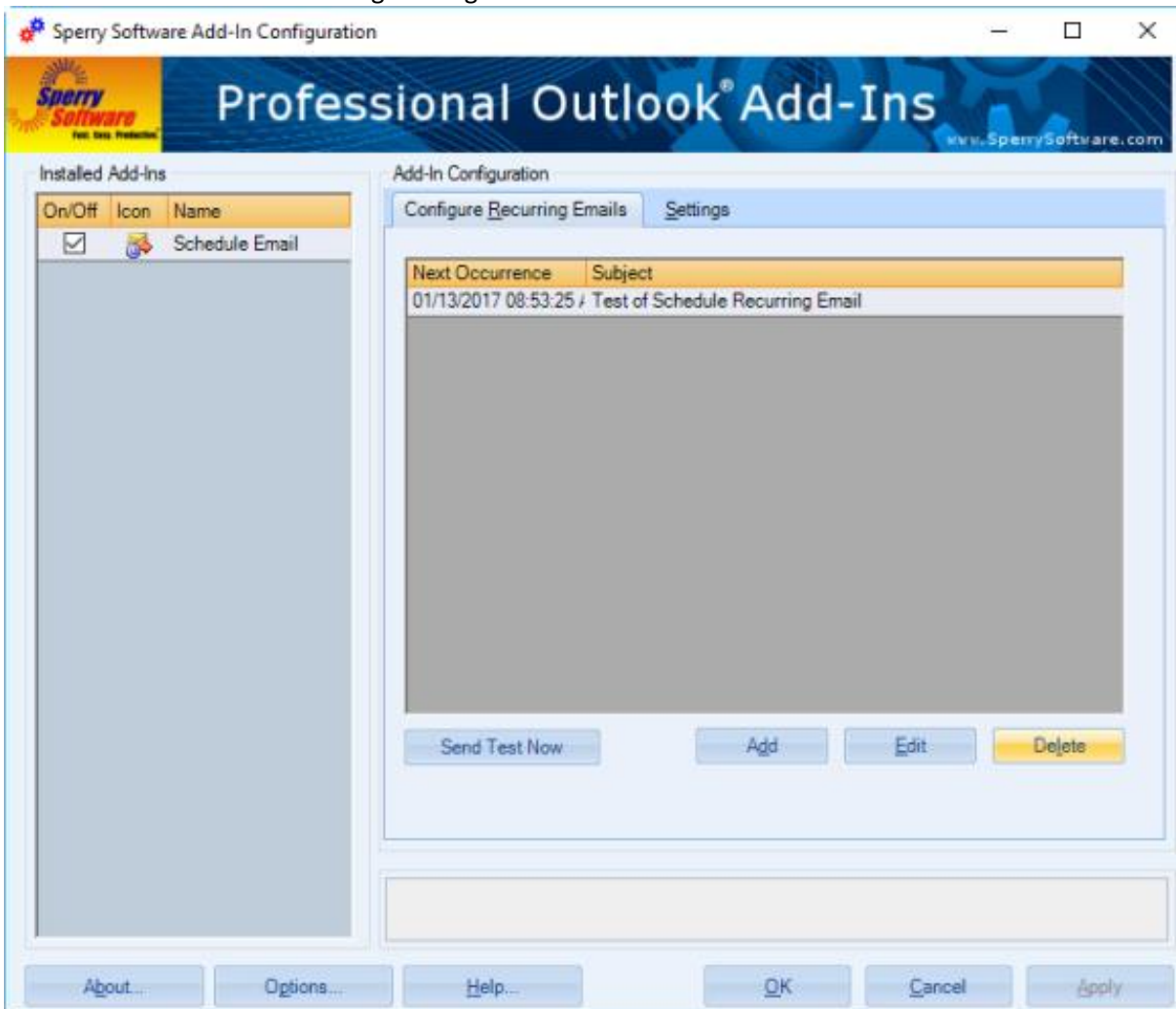


Figure 8 (New recurring email added to list)

And that’s all there is to it! As long as Outlook is running the email will go out as scheduled.

Note that when we first looked at creating a new recurring email, we chose **Create/Edit Template**. If there were already scheduled emails that were created, we could choose to re-use those templates in a new recurring email schedule by clicking on the **Choose Existing Template**. This is useful if you need to create several schedules for the same recipients, with the same subject and content.

Another point to consider when choosing a schedule is the starting date and time. If you choose a starting date and time that is in the future, then that’s when the first occurrence will take place. However, if you choose a time that is in the past then the add-in calculates the next *future* occurrence of the add-in and that’s the date you will see in the Next Occurrence column.

You can choose from several repeat intervals (loosely based on Outlook’s appointment time): daily, weekly, monthly, yearly, hourly or random. (The repeat intervals are located in the Configure a Recurring Email dialog box.)

The daily pattern allows you to send emails every day, every other day, every third day, etc, or every weekday:

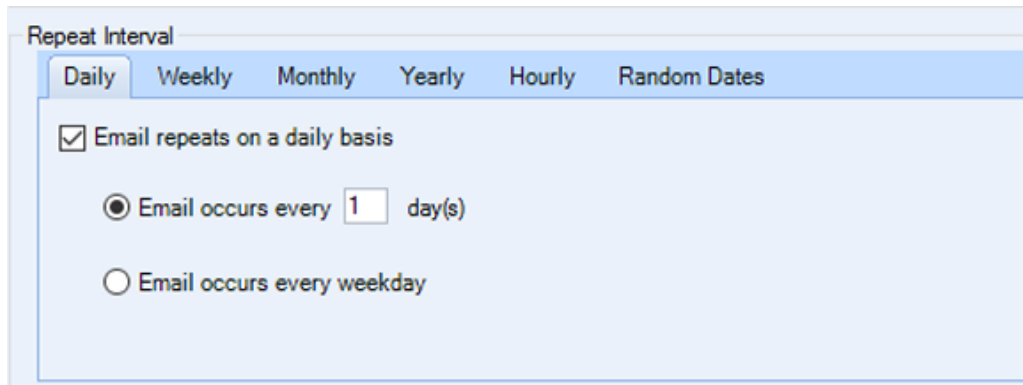


Figure 9 (Sample Daily Repeat Interval)

The weekly pattern allows you to send emails that go out on certain days of the week. You can also specify a pattern such as every other Friday by placing a checkmark in the Friday checkbox and a “2” in place of the **Every 1 week(s)** area below. Note that there would be no difference between selecting all the days of the week versus choosing a daily recurrence pattern.

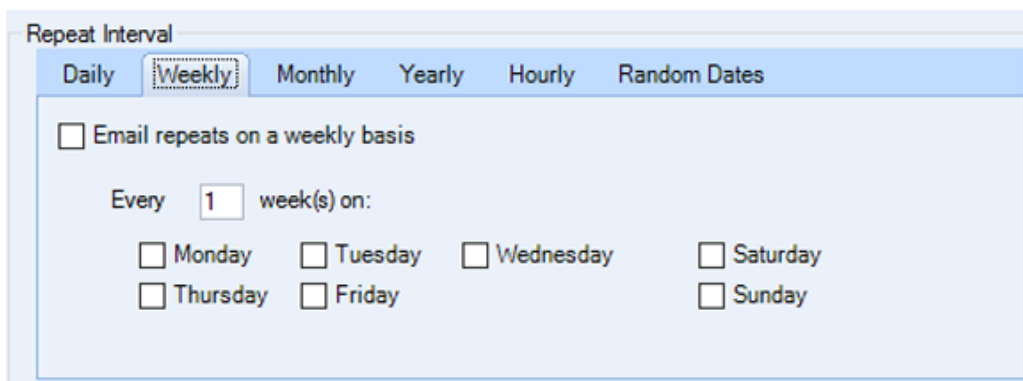


Figure 10 (Sample Weekly Repeat Interval)

The monthly pattern allows you to send an email that goes out on a certain day of the month, or on the first, second, third, fourth or last day of the month. In addition, you can specify a number of days of offset; this is to accommodate a pattern like “two days before the last weekday of the month” (you would need to put a “-2” to subtract days in that case). You can also specify every month, every other month, etc. This would be useful to schedule quarterly reminders (assuming you put a “3” in the **Email occurs every 1 month(s)** area).

Repeat Interval

Daily
 Weekly
 Monthly
 Yearly
 Hourly
 Random Dates

Email repeats on a monthly basis

Email occurs every month(s)

on day of the month.

on the of the month.

Plus/Minus day(s)

Figure 11 (Sample Monthly Repeat Interval)

The yearly pattern allows you to send emails that go out on a certain day of the year; you can also send out emails on the first, second, third, fourth or last weekday/weekend day of a particular month. This pattern also allows a number of days of offset just like the monthly pattern.

Repeat Interval

Daily
 Weekly
 Monthly
 Yearly
 Hourly
 Random Dates

Email repeats on a yearly basis

on day of

on the of

Plus/Minus day(s)

Figure 12 (Sample Yearly Repeat Interval)

The next pattern is the hourly recurrence. This one is rather simple, sending the emails once an hour, every other hour, etc.

Repeat Interval

Daily
 Weekly
 Monthly
 Yearly
 Hourly
 Random Dates

Email repeats on an hourly basis

Email occurs every hour(s)

Figure 13 (Sample Hourly Repeat Interval)

The final recurrence pattern is the random date pattern. As the name implies, you can schedule emails to go out on random dates that you assign in advance.

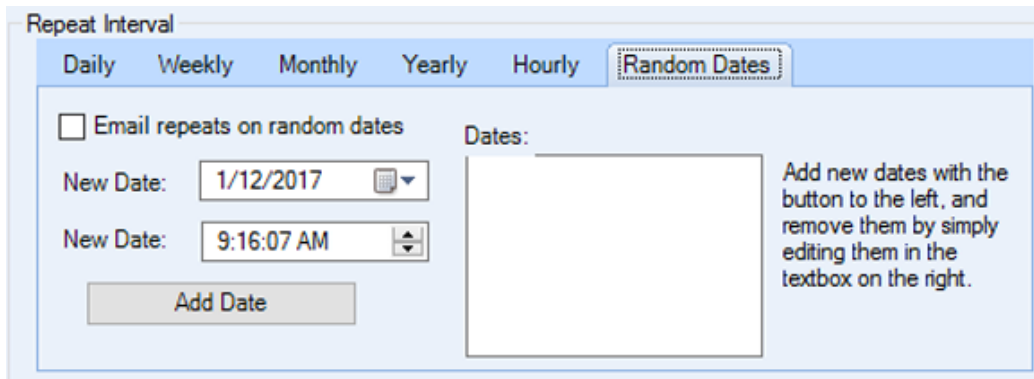


Figure 14 (Sample Random Dates Repeat Interval)

As the name implies, you can add dates (and times) with the calendar list arrow and the time spin box. In order to remove dates, simply highlight the one you are no longer interested in and delete it.

A final point to consider when creating a new repeat interval has to do with attachments. If you attach a file while composing the template with Outlook, then that attachment becomes part of the template message file and stays with it when sending. However, it might be beneficial for you to *dynamically* attach the file, at the time that the email gets sent out. To do this, rather than attaching the file while *composing* the email, use the options at the bottom of the **Configure a Recurring Window** to attach either files or entire folders. Doing it this way forces the Add-in to attach the file at the time of sending, allowing you a chance to edit and change files as necessary.

For instance, Sperry Software has one customer in a small town in Indiana, a 911 call center operator. After a call was completed, she wrote up a brief summary of the call for the local reporters into a document. This document was scheduled to be “picked up” by the add-in once a week and sent out to the reports; all the call center operator had to do was update the same document each week.

Settings Tab

There are three fields on this tab – Timer Control, Backup and Restore, and Convert from Older Versions.

- **Timer Control** can be used to turn on/off the timer, as well as set the frequency with which Outlook will look for new scheduled emails. As mentioned above this is the sensitivity that the Add-in uses to send out the emails.
- **Backup and Restore** backs or restores all of your scheduled emails to or from a zip file.
- **Convert from Older Versions** can import your previously scheduled emails into your current version of Outlook. Older versions of the software used to rely on an Outlook calendar (“Scheduled Emails”) and this is no longer the case. This conversion allows the update to occur, after which that calendar can be safely deleted.

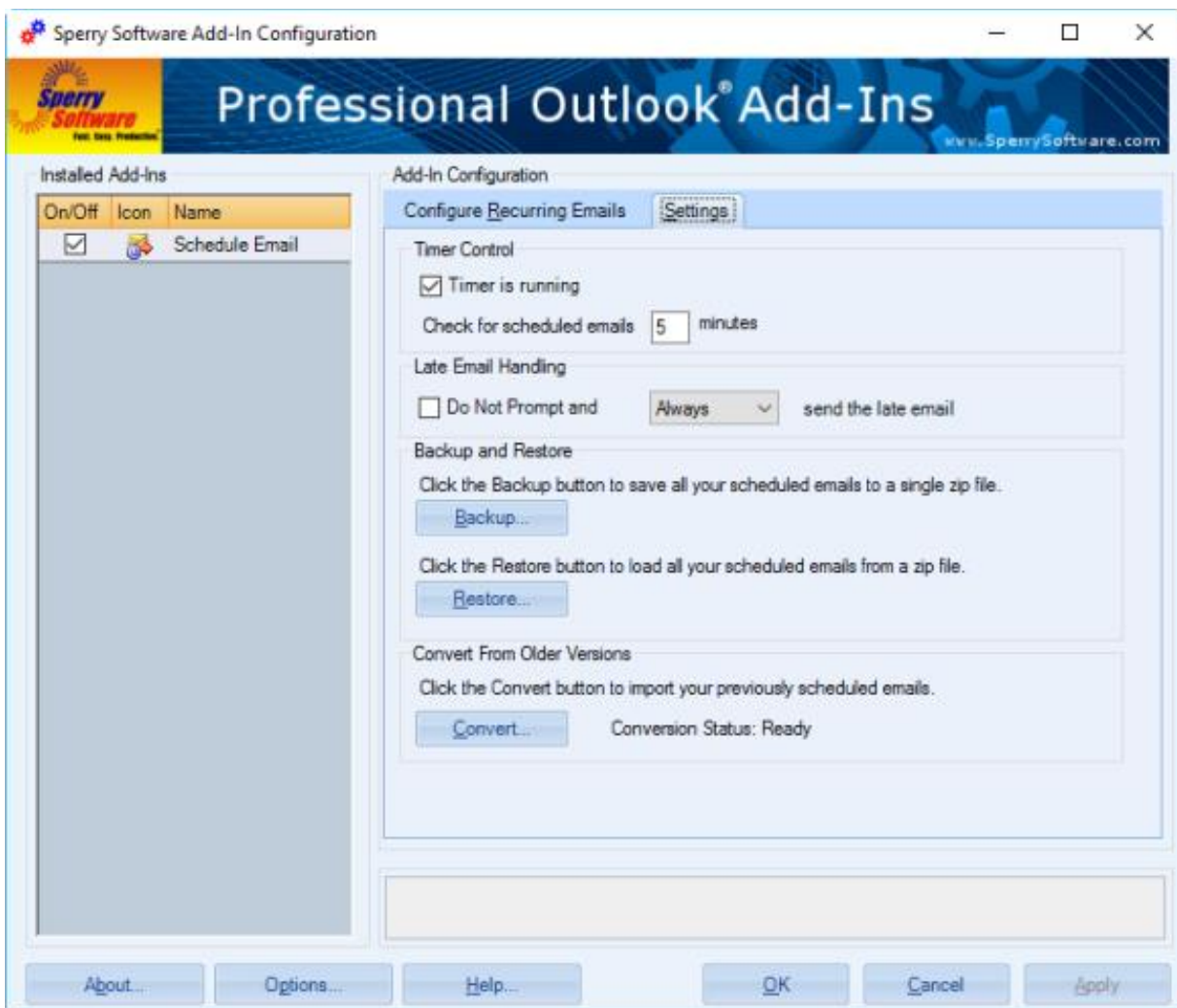


Figure 15 (Recurring Email Add-in Settings tab)

Troubleshooting

Q. The “Sperry Software Add-ins” button is not visible.

A. There could be several reasons for this. See this article to figure out how to resolve this problem:

<https://sperrysoftware.freshdesk.com/solution/articles/5000626926-i-installed-the-add-in-but-i-can-t-see-it-in-outlook->

Q. The “Sperry Software Add-ins” button does not pull up the Configuration window.

A. Run the add-in Reset tool.

The add-in reset tool can be downloaded from

<http://www.sperrysoftware.com/outlook/tools.asp>

Q. How can we contact you for more help?

A. For help on more in-depth issues, check out our [Knowledge Base](#) especially the FAQ about how to enter a bug report.