



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, a birthday, an anniversary, or to remind you or someone else to take a medication.

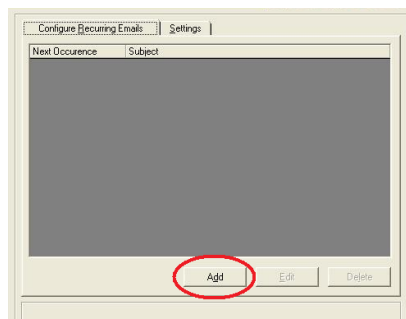
You can view your entire list of pending events at a glance, attach a file or even a folder to the message. When a recurring email is sent, all files in the attached folder are selected as attachments and sent to the email address(es) specified when you created the template. Note: Attachment(s) are fetched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

Note: The Outlook security prompt will appear when creating a recurring email for the first time. After that, it will no longer appear. That is, it will not appear when the recurring email is sent.

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”).

How to Create a New Recurring Email

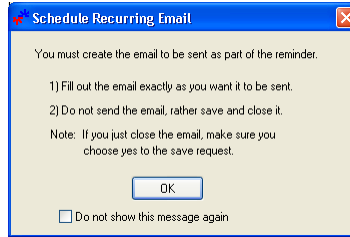
- Start Outlook
- Click on Sperry Software Add-in Button
- Click Schedule Recurring Email Add-in Button
- Click on Add



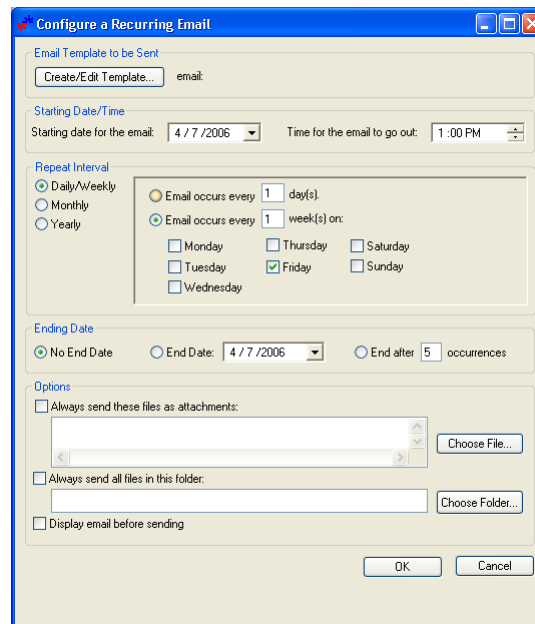
- Click on the Create/Edit Template Button



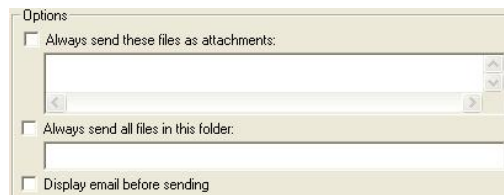
- The following security prompt may pop up:



- Click OK
- New Blank Message appears
- Create new message as you normally would
- Close by clicking on the “X” in the upper right
- When asked to save choose YES
- Choose Schedule



- ❖ Be sure to include the time to send email
- ❖ You can also choose your options such as “Display Email before Sending” Or “Always send as an attachment.”



- Click OK and the message will be added to the main list

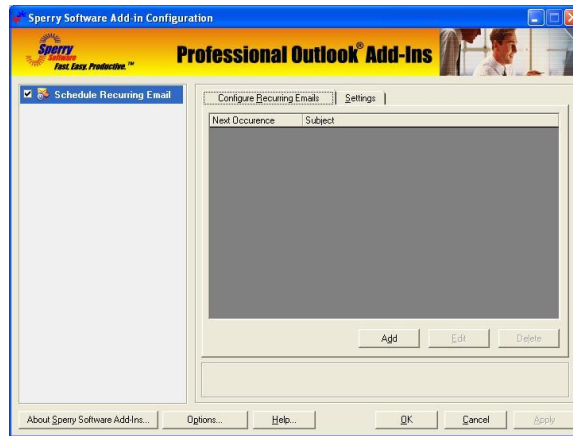
Configuring the Add-in

Once the installation is complete, you are ready to use Schedule Recurring Email. When you open Outlook you will notice a new button “Sperry Software Add-ins” added to the toolbar.



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.

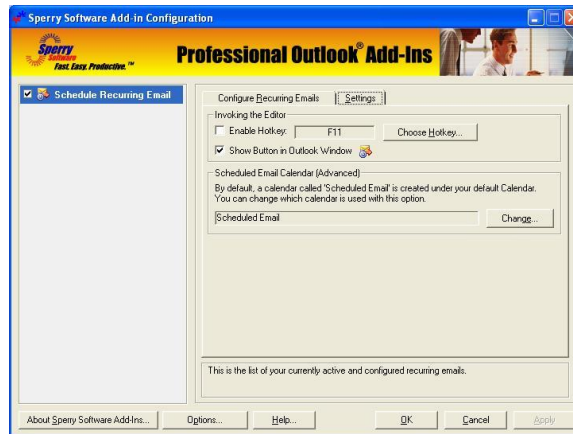
Configure Recurring Emails Tab



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...”, and 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, even having two or more go out at the same time, however the finest granularity between emails is 15 minutes.

Settings Tab



This tab allows you to set Hotkey, toolbar button, and save folder options. Choose a Hotkey and/or enable the Recurring Emails toolbar button to easily access the Recurring Emails Editor. The “Scheduled Email Calendar (Advanced)” frame allows you to specify a calendar where your Recurring Emails will be posted. By default this add-in creates a calendar titled “Scheduled Email” which is placed below your standard Outlook Calendar. You can specify a different calendar by clicking the “Change...” button.

Troubleshooting

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

A. The add-in may have become disabled.

For Outlook 2002, 2003 users:

On the Outlook Menu, click Help...About Microsoft Outlook

Click the “Disabled Items” button

If “Sperry Software” is listed, enable it and restart Outlook

For Outlook 2007 users:

On the Outlook Menu, click Help...Disabled Items

If “Sperry Software” is listed, enable it and restart Outlook

The Sperry Software toolbar may not be set to “Visible”

On the Outlook Menu, click View...Toolbars and make sure that Sperry Software is checked.

Q. The “Sperry Software Add-ins” button does not respond.

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](#).