



Schedule Recurring Email for Office 365

User's Guide

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Welcome

Thank you for choosing the Schedule Recurring Email for Office 365, created by Sperry Software. This service allows you to automatically schedule and send repetitive emails at intervals that you specify. Send reminders about upcoming events like upcoming Windows updates, sports practices, monthly board meetings, or group or civic meetings.




Getting Started

For our example, Dev Inuser (the customer) will purchase a subscription for Mike (the user). Mike will then schedule his first email. After it goes out, Mike will be able to see the sent email in his Sent Items folder of his Office 365 account and their lives will be made all the more better for it.

So, once Dev finishes the purchase, the Schedule Recurring Email for Office 365 is ready for use. Immediately after the purchase the screen will look similar to this:

Order received

Save time next time you checkout by linking your account to your favorite social network. No need to remember another username and password.

 [Link your account to Facebook](#)  [Link your account to Twitter](#)  [Link your account to Google](#)

Thank you. Your order has been received.

ORDER NUMBER:	DATE:	TOTAL:
201821690	April 26, 2018	\$0.00

Your subscription will be activated when payment clears.

View the status of your subscription in [your account](#).

Order details

Product	Total
Schedule Recurring Email for Office 365 - Free × 1	\$0.00
Subtotal:	\$0.00
Total:	\$0.00

Related Subscriptions

Subscription	Status	Next Payment	Total	
#201821691	Active	May 26, 2018	\$0.00	View

Customer details




Order Email:
mike@sperrysoftware365.onmicrosoft.com

Email: devuser@sperrysoftware.com
Figure 1 (After initial purchase)

This page shows details about the purchase process. Since ordering a subscription like Schedule Recurring Email for Office 365 creates an account by default, you can access that account by clicking on the View button:

Order received

Save time next time you checkout by linking your account to your favorite social network. No need to remember another username and password.

 [Link your account to Facebook](#)  [Link your account to Twitter](#)  [Link your account to Google](#)

Thank you. Your order has been received.

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Subtotal:	\$0.00
Total:	\$0.00

Related Subscriptions

Subscription	Status	Next Payment	Total	
#201821691	Active	May 26, 2018	\$0.00	View

Customer details

Order Email:
mike@sperrysoftware365.onmicrosoft.com

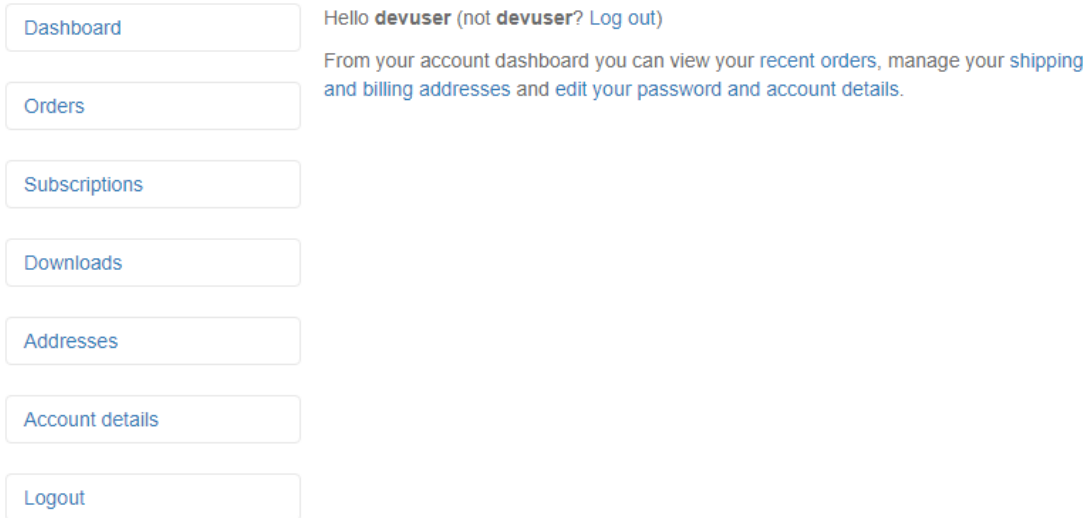
Email: devuser@sperrysoftware.com

Figure 2 (The View button leads to your account)

Note that you can also click the link leading to your account (above the Order Details summary) to access your account. Note that Dev is the owner of the account, since she was the purchaser.

After you click the View button you will be brought to your Account:

My Account



Dashboard

Orders

Subscriptions

Downloads

Addresses

Account details

Logout

Hello **devuser** (not **devuser**? [Log out](#))

From your account dashboard you can view your [recent orders](#), manage your [shipping and billing addresses](#) and edit your password and account details.

Figure 3 (View of a typical account)

This is the standard view when you log into your Account. You can view all your past orders, along with the Subscriptions that were purchased:

Subscription #201821691

[Dashboard](#)

[Orders](#)

[Subscriptions](#)

[Downloads](#)

[Addresses](#)

[Account details](#)

[Logout](#)

Licensed Schedule Recurring Email for Office 365 User

Email Address	Action
mike@sperrysoftware365.onmicrosoft.com	Remove this user
1 of 1 Licenses In Use	Buy More Licenses

Add New Schedule Recurring Email for Office 365 User

The maximum number of users has been reached but you can purchase more licenses using the link above.

[Go to my email schedules](#)

Subscription Details

Status	Active
Start Date	4 mins ago
Last Payment Date	4 mins ago
Next Payment Date	May 26, 2018
Actions	Cancel

Subscription Totals

Product	Total
Schedule Recurring Email for Office 365 - Free × 1	
Tier: Free	\$0.00 / month

Figure 4 (Account Details)

The **Licensed Schedule Recurring Email for Office 365 user** section details one or more people that are authorized to use the service. It could be you, but it doesn't have to be. What it does have to be is an Office 365 email address. You can remove the current licensed user and supply a new Office 365 user, or you can purchase additional seats. Everything to do with managing the *subscription* is done here (on

www.SperrySoftware.com). Everything to do with managing the *scheduled emails* is done on www.SperrySoftware365.com.

In our example, Dev had already supplied the user's email address (mike@sperrysoftware365.onmicrosoft.com) during the ordering process, so no additional changes are needed.

When you're ready, to get started click the **[Go to my email schedules link](#)** and you will be taken to the Sperry Software 365 login page:

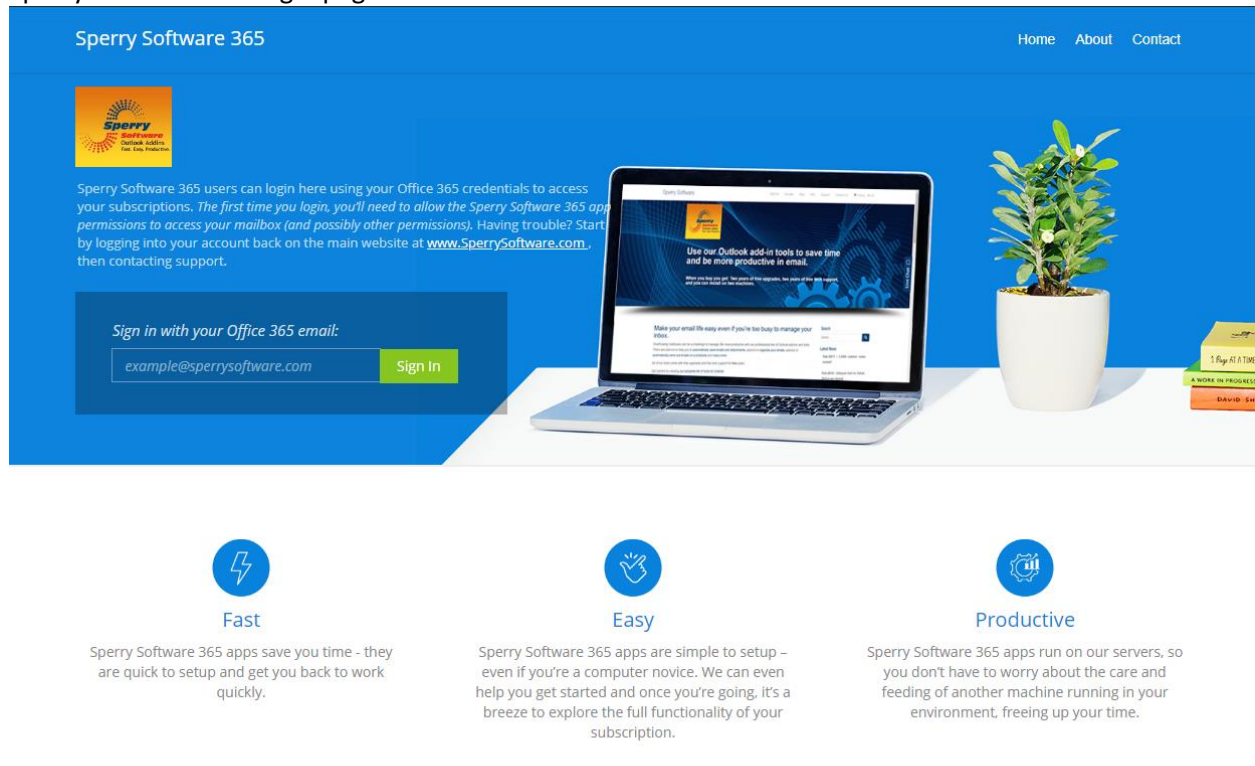


Figure 5 (SperrySoftware365.com login page)

From here, you can sign in to your Office 365 email account. Note that this is the user's email address, not necessarily the purchaser's. Once you do, if this is your first time logging in you'll be brought to the standard Microsoft Office 365 login:

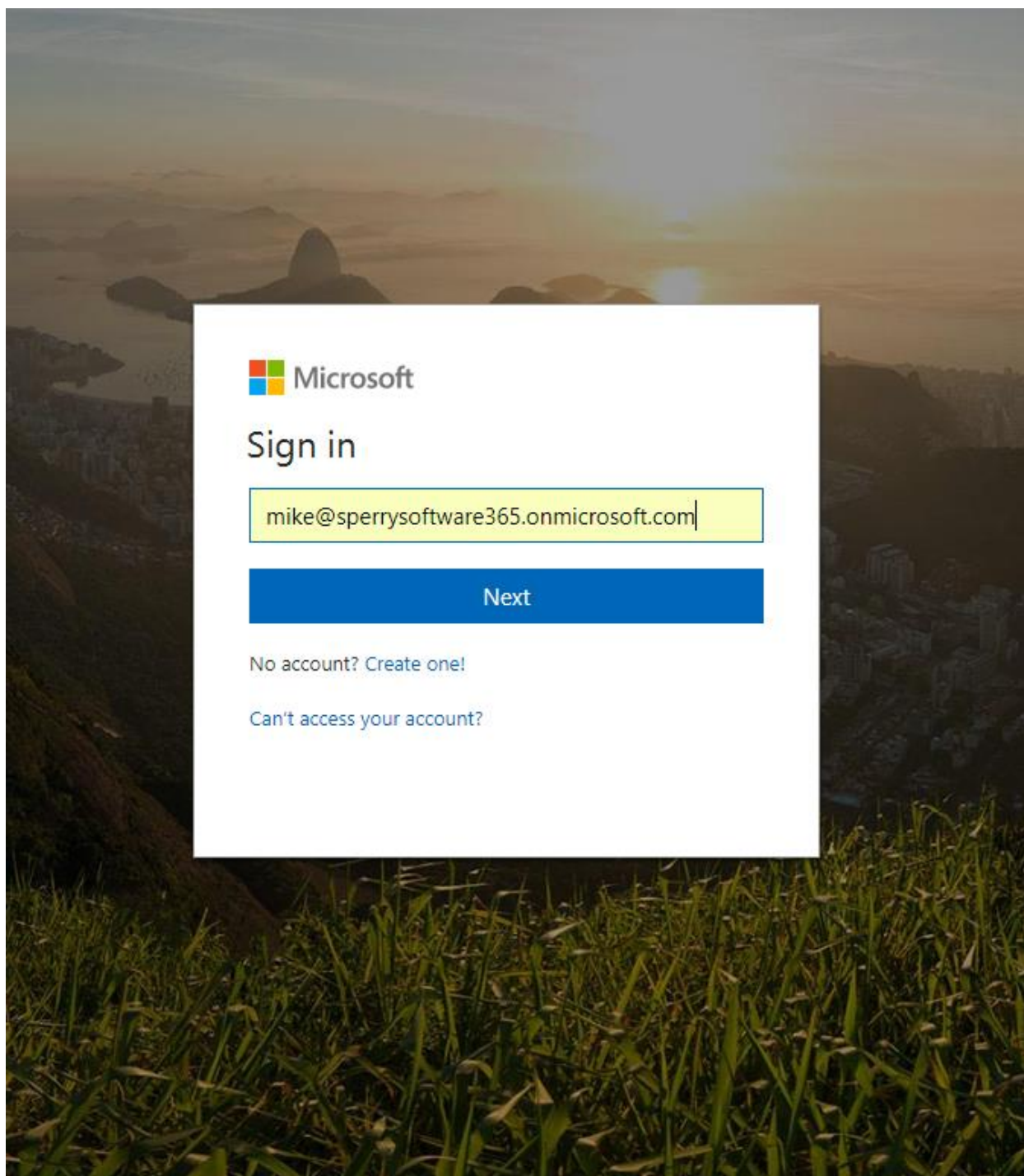


Figure 6 (Microsoft Office 365 login page)

Login like usual, and accept the permissions if Microsoft prompts you to do so. After you do, you'll be brought to the Sperry Software 365 Dashboard page:

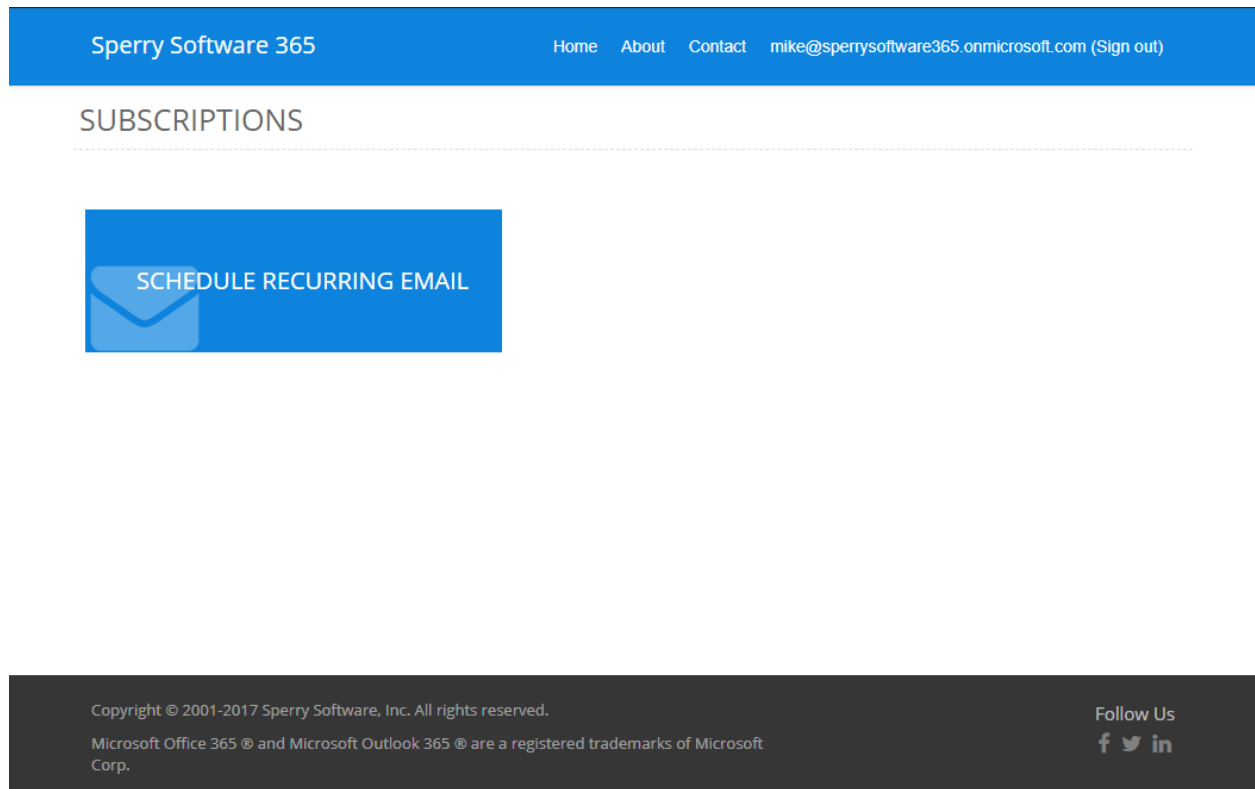


Figure 7 (List of active subscriptions)

This is where all your subscriptions are accessed. Today, there is only the Schedule Recurring Email but in the future, as we add new services, they will appear here.

Clicking on the **Schedule Recurring Email** button brings you to the list of your scheduled emails (called *Templates*):

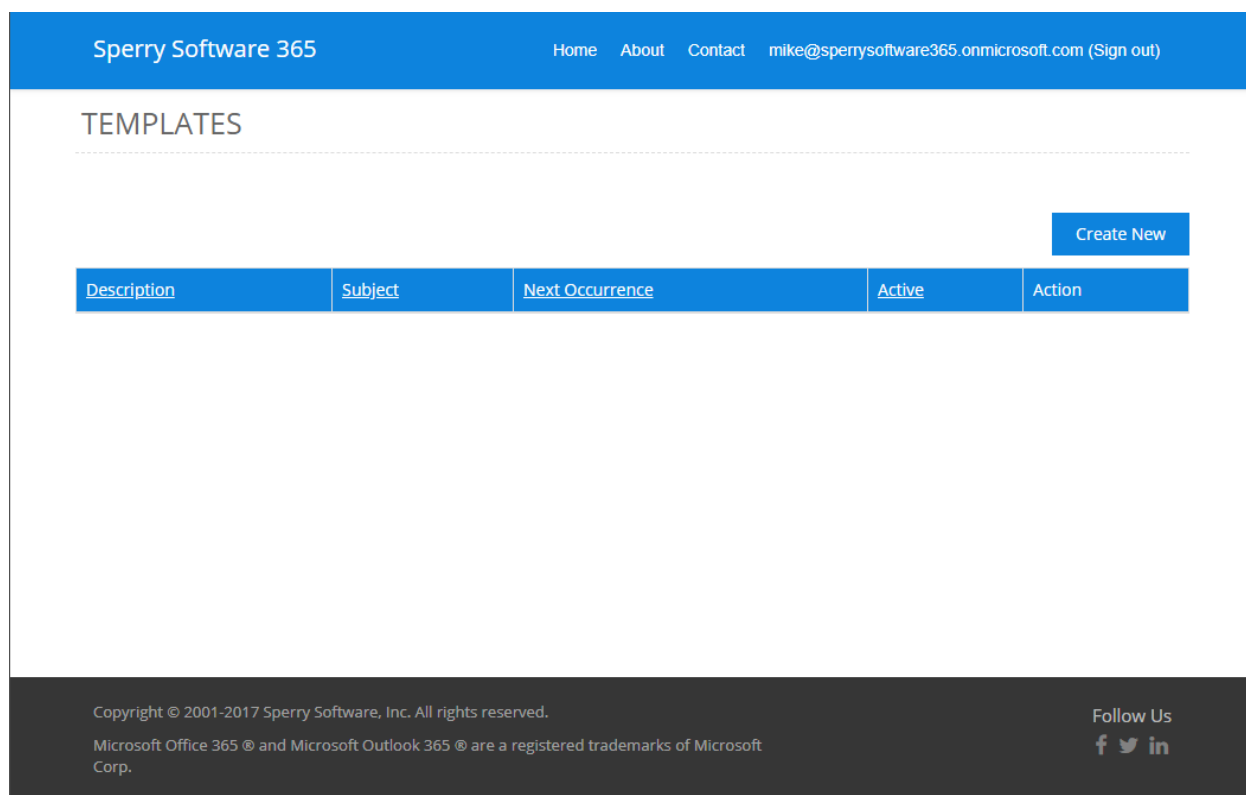


Figure 8 (A list of all your scheduled emails will appear here)

To create a new scheduled email, click on the Create New button, which will bring you to the Create New Template view:

EMAIL DETAILS

Description

To

Cc

Bcc

Subject

Body

Paragraph ▾

B *I* U abc

▾


▾

Repeat Interval

Daily

Starting Date/Time

4/26/2018 12:20 PM



Repeat Interval

☒ Email occurs every

0

day(s)


☐ Email occurs every weekday

Ending Date

☒ No End Date

☐ End Date:

Select date



☐ End after

0

occurrences

[Back to List](#)

Save

Figure 9 (Create/edit the email and schedule)

This is where you add the details to your new email. You fill it out like normal (including a description, which will be shown to you back on the previous screen so that when you view the list you can remember what that email is for).

On the right hand side is where you schedule the email. This section will change options based on the interval selected, but in general for each a starting date, a repeat interval, and an ending date are required. Here's an example:







EMAIL DETAILS

Remind co-workers to submit expense receipts

✖ AllEmployees@mycompany.com

Bcc

Last Chance to Submit Your Monthly Expense Receipts

Paragraph **B** *I* U abc      

Sincerely,
The Accounting Team

Monthly

4/26/2018 1:30 PM

Email occurs every

1

month(s)

☐ on day

Please Select

of the month

on the

Last

Monday

of the month

☒ No End Date☐ End Date:

Select date

☐ End after

occurrences

Downloaded from <http://ajph.org/> at University of California, San Diego on June 11, 2015

Once everything looks good, click the Save button. This will bring you back to the list of your scheduled emails including this new one:

TEMPLATES

[Create New](#)

Description	Subject	Next Occurrence	Active	Action
Remind co-workers to submit expense reports	Last Chance to Submit Your Monthly Expense Reports	5/28/2018 1:30:00 PM	<input checked="" type="checkbox"/>	✎ 🗑

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As a test, you can schedule an email to yourself.

And that's all there is to it! Now just wait until the designated time and check your Sent Items folder to see the scheduled email once it's been sent.

Troubleshooting

Q. How can we contact you for help?

A. For help, email us at techsupport@sperrysoftware.com. It would be very helpful if you could include a screenshot, along with a brief description of what you trying to do and then what happened.