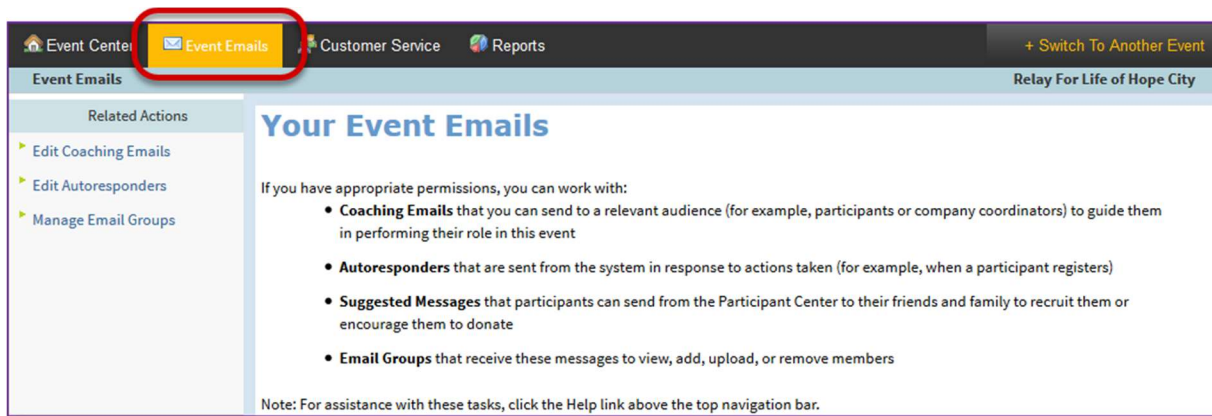


## Chapter 5: Event Emails

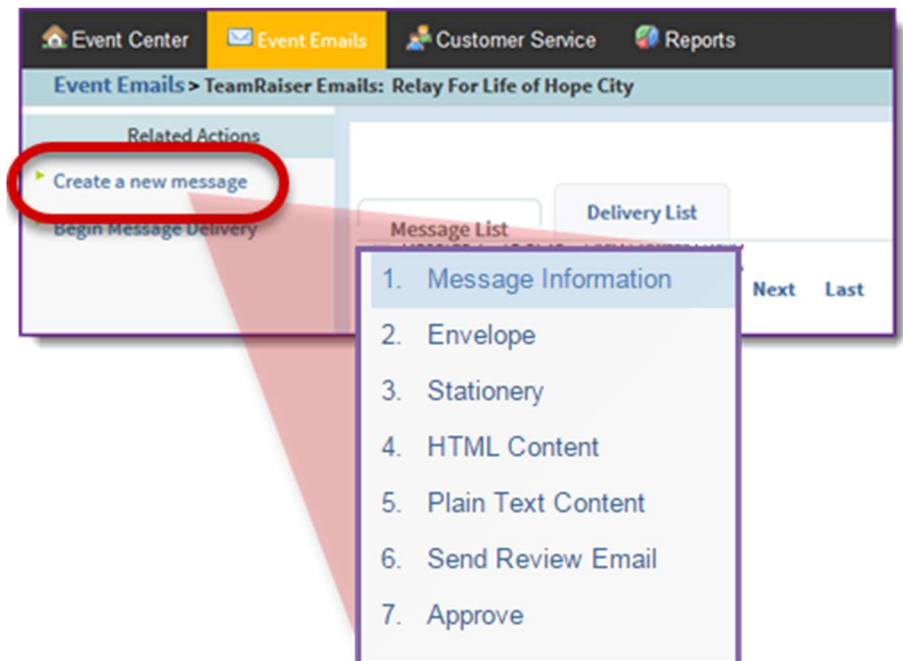
- [Create and Customize a local email](#)
- [Copy a National Email Template to Customize](#)
  - [Customize your newly copied email message](#)
- [Insert Documents and Photos](#)
  - [Create a link to a document](#)
  - [Insert an image](#)
- [Send your local email](#)
  - [Send an Engagement Email to Current Event Participants](#)
  - [Send a Recruitment Email to Prior Event Participants](#)
- [Review sent and scheduled messages](#)

### Create and Customize a New Email

1. From the EMC, click **Event Emails**.



2. Under Related Actions, select **Edit Coaching Emails**.
3. Click **Create a new message** from the Related Actions (left hand side of the page).
4. A **Process Navigator** is displayed on the left to guide you through the 7 step process of customizing your local email message.



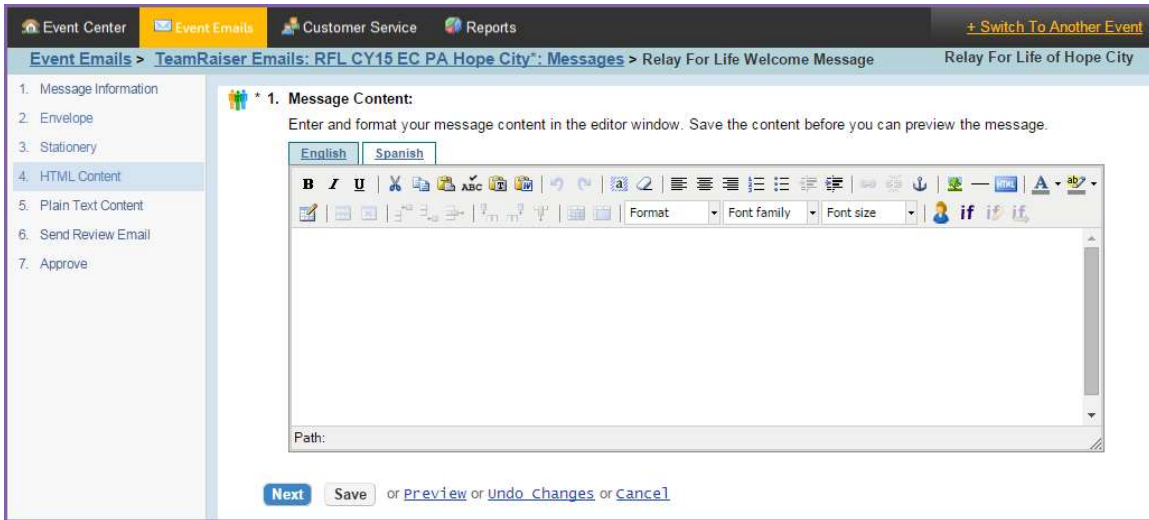
- a. **Step 1 – Message Information:** Specify the following information for internal identification of your message. Your recipients will not see this information. *(screen shot on following page)*
- Message Name:** Enter a message name that will help uniquely identify the email when browsing the messages list of the Event EMC. This field is required.
  - Description:** Enter a brief statement about the email purpose. This field is not required.
  - Select the message type:** If you wish to group similar messages together for organizational or reporting purposes, select a type of message from the drop down menu. This field is not required.
  - Duplicate Suppression:** Always leave duplication suppression marked as **Yes**.
  - Click **Next**.

- b. **Step 2 – Envelope:** Specify the following information.

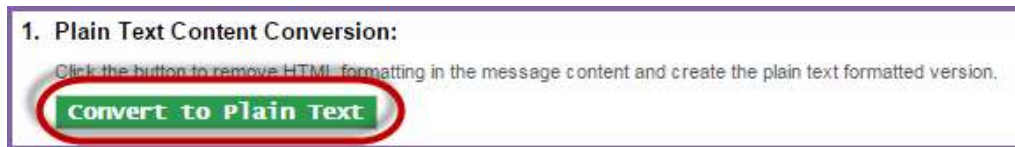
- Enter the sender's name:** Enter who the email is "from."
- Enter the sender's email address:** Enter the return email address to which the recipient can send reply emails. This must be an actual email address so questions will be delivered to the proper support.
- Enter the subject line of this message:** Enter the phrase that you want recipients to see as the email subject. Keep subject lines short and sweet!
- Click **Next**.

*If you have any questions, please open an [event support case](#)*

- c. **Step 3 – Stationery:** The stationery has already been selected for you. click **Next**.
- d. **Step 4 – HTML Content:** Use the WYSIWYG toolbar to create the content of your email.



- i. Click the **Preview** button to review the message layout and to check for typos and test links.
  - ii. Once you have previewed and saved your message, click **Next**.
- e. **Step 5 – Plain Text Content:** Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding



- i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like *“Use the link below...”* if you have embedded a link behind some text.
  - ii. Click the **Preview** button to review the message layout and to check for typos and test links.
  - iii. Once you have previewed and saved your message, click **Next**.
- f. **Step 6 – Send Review Email:** Send a test message to yourself or another person to proof read.
- g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send.



- h. Click **Finish**.

*If you have any questions, please open an [event support case](#)*

- i. After approving the email for delivery, you'll be returned to the **Message List**.

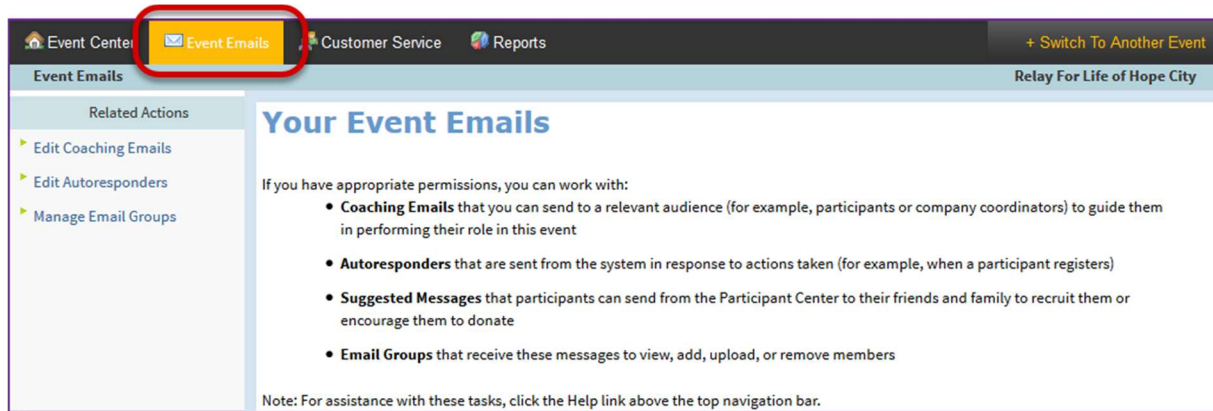
|                                |                 |                          |                   |                       |   |
|--------------------------------|-----------------|--------------------------|-------------------|-----------------------|---|
| Relay For Life Welcome Message | Copy            | Approved<br>(never sent) | Email<br>Messages | No Tentative Schedule | Dec 2, 2014 1:37:09<br>PM by Amy Delozier |
|                                | Delete          |                          |                   |                       |   |
|                                | Archive         |                          |                   |                       |   |
|                                | Preview         |                          |                   |                       |   |
|                                | Return to Draft |                          |                   |                       |   |
|                                | Begin Delivery  |                          |                   |                       |   |

- i. **Copy:** Copy the format of your message to create a new email with the same look and feel.
- ii. **Delete** or **Archive:** Deleting and/or archiving an email will provide you an opportunity to manage the list of emails as they appear in the EMC.
- iii. **Preview:** Preview the message in HTML and Plain text by clicking the Preview link.
- iv. **Return to Draft:** Once an email has been approved, you can no longer edit it. Unless you move it back to a draft.
- v. **Begin Delivery:** Choose Begin Delivery to begin the process of sending your message to the proper recipients. [More information about sending an email can be found later in this chapter.](#)

## Copy a National Email Template to Customize

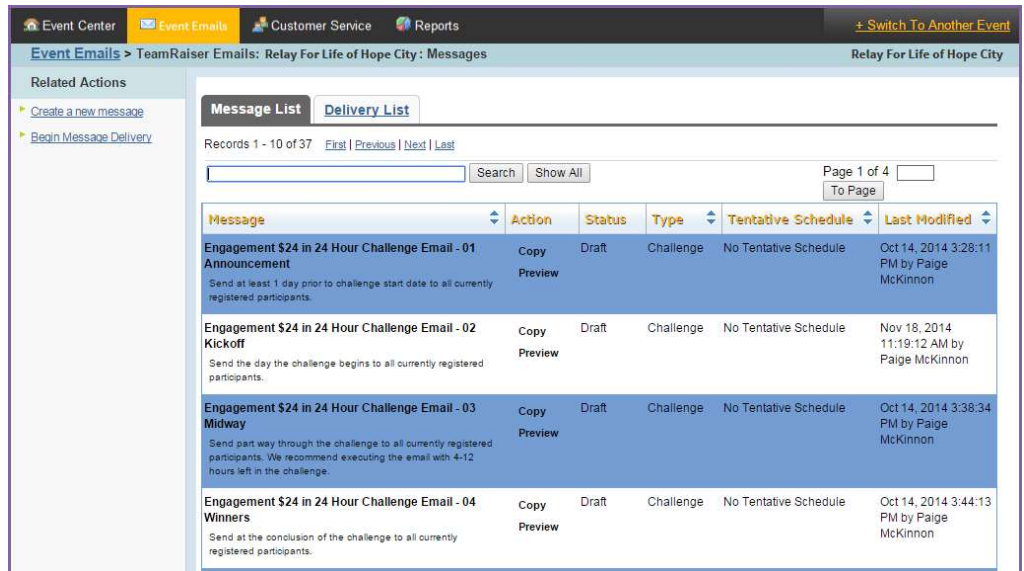
There are a variety of pre-written email templates available to you in your Coaching Email Center. You can send 'as is' or modify and add custom content. The email template must be copied and approved before you can send it.

1. From the EMC, click **Event Emails**.





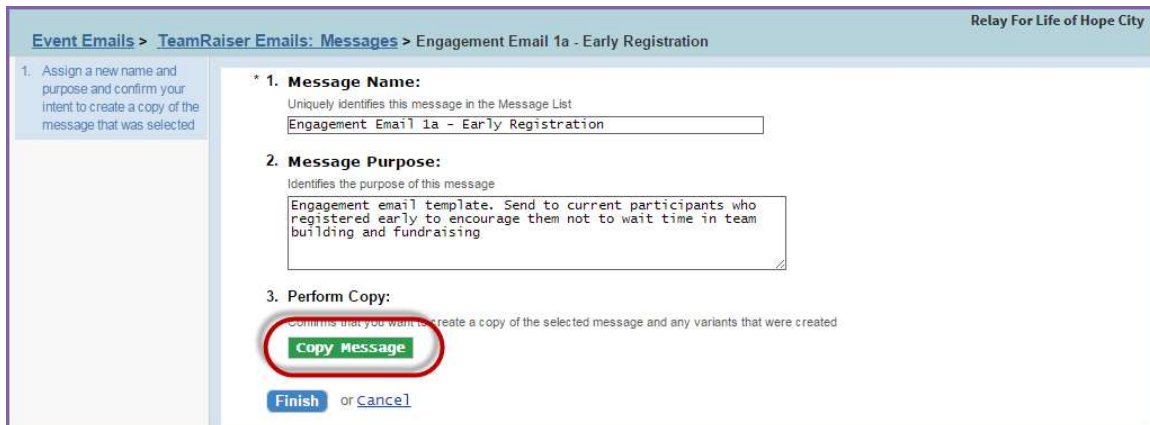
- Under Related Actions, select **Edit Coaching Emails**.
- A list of all available email messages will display.



- Find the email you wish to send in the list, and click **Copy** next to the message name.



- Confirm your copy, and complete the action by clicking the green **Copy Message** button.



- Once your message has been copied, a new version will be available for editing.



## Customize your newly copied message

1. Find your newly copied email message in the list and click **Edit** next to the message name.
2. A **Process Navigator** is displayed on the left to guide you through the 7 step process of customizing your local email message.
  - a. **Step 1 – Message Information:** Do not change. The email templates were all created with a specific naming convention, to allow for reporting on the success of the campaign.
    - i. Click **Next**.
  - b. **Step 2 – Envelope:** Specify the following information:
    - i. **Enter the sender's name:** Enter who the email is “from.”
    - ii. **Enter the sender's email address:** Enter the return email address to which the recipient can send reply emails. This must be an actual email address so questions will be delivered to the proper support.
    - iii. **Enter the subject line of this message:** The email templates already contain Subject Lines that match the email content. You can leave ‘as is’ or updated with your own.
    - iv. Click **Next**.

1. Message Information

2. Envelope

3. Stationery

4. HTML Content

5. Plain Text Content

6. Send Review Email

7. Approve

**1. Sender Name:**  
Enter the name to display in the From area of the email header and inbox of message recipients.  
English Spanish  
Relay For Life of Hope City

**2. Reply-To Email Address:**  
Enter the email address where replies to the message will be sent. The Sender Email Address will be used by default if empty.  
sue.smiley@cancer.org

**3. Message Subject:**  
Enter the phrase or select a personalized option to display in the Subject area in the email header and inbox of the message recipients.  
English Spanish  
Don't waste any time!  
Select Personalization Option

Next or Cancel

- c. **Step 3 – Stationery:** Select a stationery which will give each email a look or theme. After selecting your stationery, click **Next**.
    - d. **Step 4 – HTML Content:** Use the WYSIWYG to add custom content to the email message.

1. Message Information

2. Envelope

3. Stationery

4. HTML Content

5. Plain Text Content

6. Send Review Email

7. Approve

**1. Message Content:**  
Enter and format your message content in the editor window. Save the content before you can preview the message.  
English Spanish

Dear [[S1:first\_name]],

You have signed up early for the [[S47:66330:fr\_info:1:event\_title]] and showed that you are committed to fighting cancer everyday - and not just when we gather on [[S47:66330:fr\_info:1:event\_date]]. Thank you for your early registration and being a leader in our community.

While our [[S47:66330:fr\_info:1:event\_title]] is still [x] months away, you've shown that it's never too early to get started. Keep up the momentum of registering online with some extra cancer-fighting fundraising work with your team!

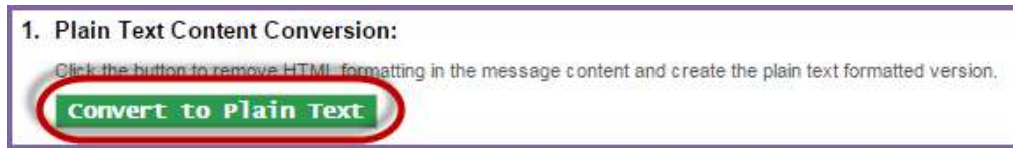
- Aim to join the Hope Club before the end of the year! The Hope Club is a nationwide army of Relay For Life participants that have raised the suggested minimum of \$100 and have earned their Relay For Life event t-shirts! Why wait to try and fulfill your

Path:

Next Save Preview or Undo Changes or Cancel

If you have any questions, please open an [event support case](#)

- i. Click **Save** often, so as not to lose your edits.
  - ii. Click the **Preview** button to review the message layout and to check for typos and test links.
  - iii. Once you have previewed and saved your message, click **Next**.
- e. **Step 5 – Plain Text Content:** Click the **Convert to Plain Text** button to update the message you wrote in HTML content into Plain Text formatting. All HTML code (like font changes and images) will be removed but link-specific code will remain. You do not have to edit this coding



- i. Determine if any changes need to be made to the Plain Text formatting. Some things to look for are inconsistent spacing and placement of hyperlinks. When converting HTML content to plain text, hyperlinks will be moved to the end of a paragraph. Adjust your text as necessary. For example, you may choose to insert something like “Use the link below...” if you have embedded a link behind some text.
  - ii. Click the **Preview** button to review the message layout and to check for typos and test links.
  - iii. Once you have previewed and saved your message, click **Next**.
- f. **Step 6 – Send Review Email:** Send a test message to yourself or another person to proof read.
- g. **Step 7 – Approve:** Click **Approve** to identify this message as ready to send.



- h. Click **Finish**.

|  |                        |              |                                  |                             |
|--|------------------------|--------------|----------------------------------|-----------------------------|
| <b>Engagement Email 1a - Early Registration</b>  | <b>Copy</b>            | Approved     | Engagement No Tentative Schedule | Jan 15, 2015                |
| Engagement email template. Send to current participants who registered early to encourage them not to wait time in team building and fundraising | <b>Delete</b>          | (never sent) |                                  | 11:55:05 AM by Amy Delozier |
|  | <b>Archive</b>         |              |                                  |                             |
|  | <b>Preview</b>         |              |                                  |                             |
|  | <b>Return to Draft</b> |              |                                  |                             |
|  | <b>Begin Delivery</b>  |              |                                  |                             |

- i. After approving the email for delivery, you’ll be returned to the **Message List**.
  - i. **Copy:** Copy the format of your message to create a new email with the same look and feel.
  - ii. **Delete** or **Archive:** Deleting and/or archiving an email will provide you an opportunity to manage the list of emails as they appear in the Event Manager Center.
  - iii. **Preview:** Preview the message in HTML and Plain text by clicking the Preview link.
  - iv. **Return to Draft:** Once an event has been approved, you can no longer edit it. However, by returning the email to a Draft state, you can edit the content of the email.
  - v. **Begin Delivery:** Choose Begin Delivery to begin the process of sending your message to the proper recipients. [More information about sending an email can be found later in this chapter.](#)

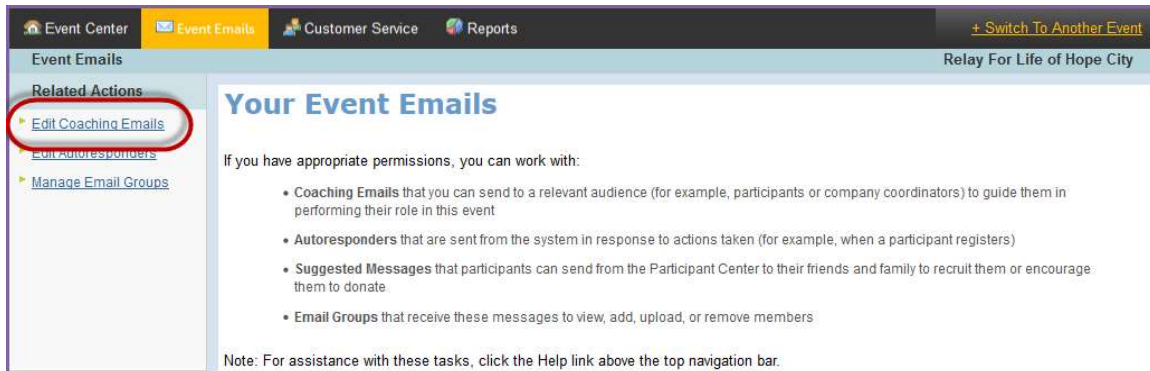
## Insert Documents and Photos

You can add local photos and documents to your event emails. Reference [Appendix C: Manage Event Library](#) for instructions for adding images and documents to your Event Library.

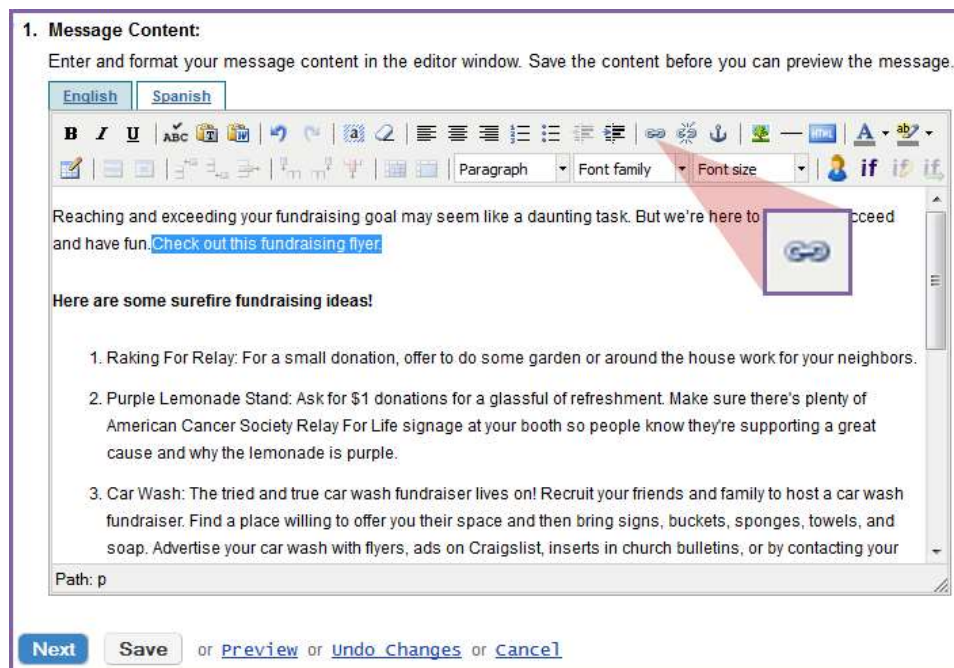
### Insert a Document Link into an Email

**Note:** Document must be uploaded into the Event Library before you can create a link.

1. From the EMC, select the **Event Emails**.
2. Under **Related Actions**, choose **Edit Coaching Emails**.



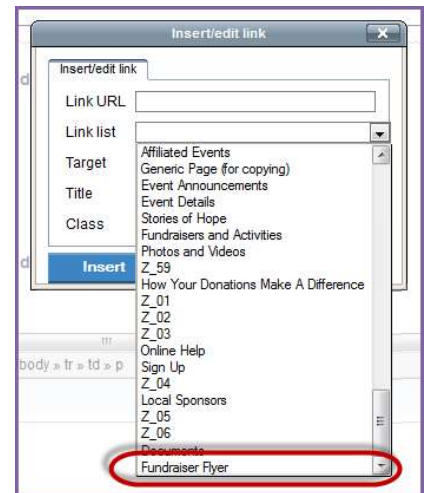
3. Follow the necessary steps to create and edit the email you wish to add the document to.
4. On step **4. HTML Content**, create your desired link text by typing directly onto the email (i.e. View the flyer here).
5. Highlight the text you'd like to be a link, then click the **Insert/Edit Link** button from the WYSIWYG tool bar.



If you have any questions, please open an [event support case](#)



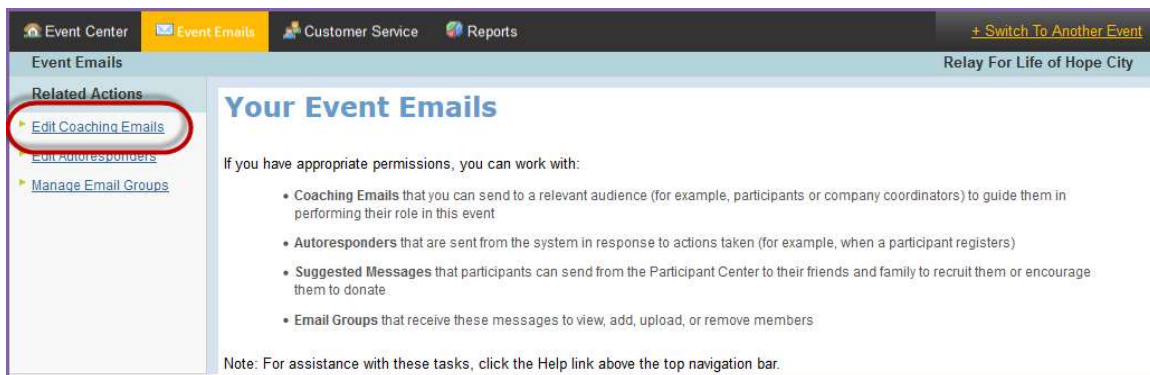
6. From the link drop down menu at the bottom of that list, you'll find all the documents you have uploaded in your document library.
7. Change the **Target** to **Open link in a new window**.
8. Click **Insert**.
9. Once you save that email, the highlighted words will become a link to the document.



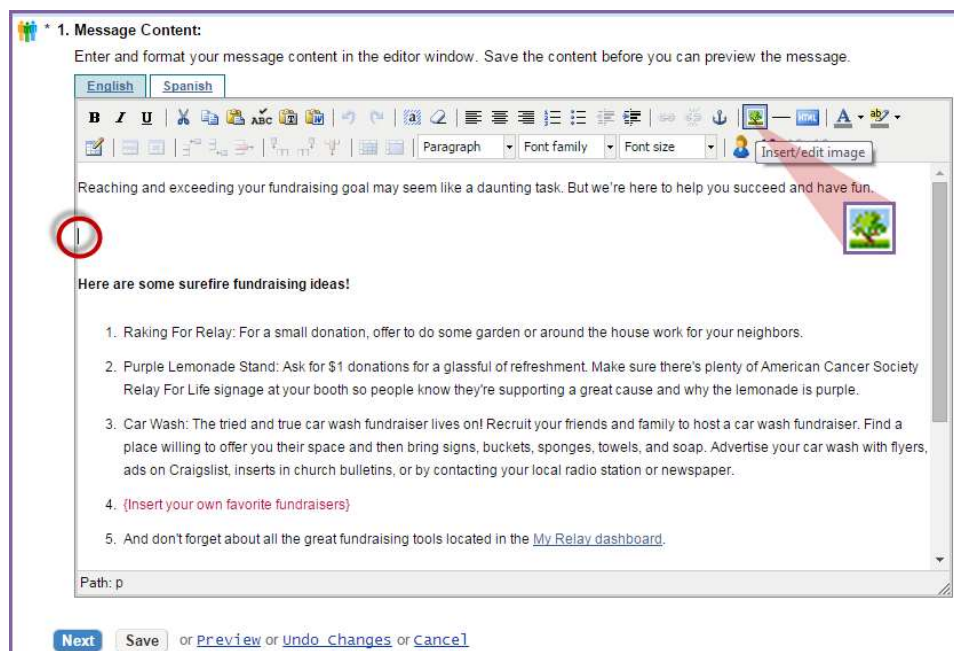
## Insert an Image into an Email

**Note:** Images must be uploaded into the Event Library before you can insert them.

1. From the EMC, select the **Event Emails**.
2. Under **Related Actions**, choose **Edit Coaching Emails** to find the email you wish to edit.

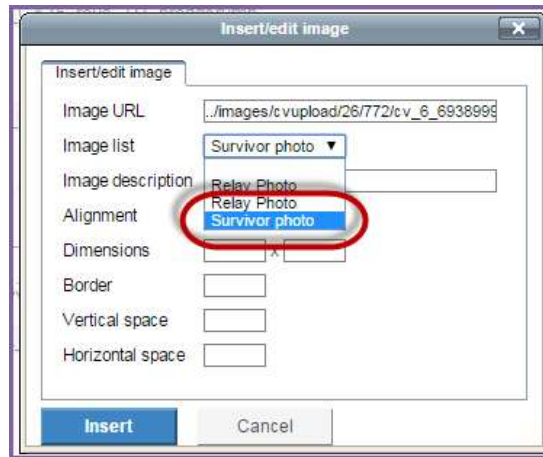


3. Follow the necessary steps to create and edit the email you wish to add the image to.
4. On step **4. HTML Content**, place your cursor at desired location in the email where you would like to add the picture.
  - a. Choose the **Insert/edit Image** button from the WYSIWYG tool bar.



**If you have any questions, please open an [event support case](#)**

- b. From the **Image List** drop down menu, you'll find all the images you have uploaded in your image library.
- c. Select the image you wish to insert. Click **Insert**.
- d. The image will appear on the webpage. While still in the edit field, pull the corners of the image to resize the picture. Through the WYSIWYG features, position the image aligned center, right, or left as desired.
- e. Once you save that page, the image will appear on the website.



## Send your Local Message

After creating, customizing, and approving your local email, follow the necessary steps to see the message delivered to the appropriate individuals.

1. From the EMC select the **Event Emails**.



2. Under Related Actions, select **Edit Coaching Emails**.
3. Locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.



4. Select the **audience** to receive this email.

## Send an Engagement Email to Current Event Participants

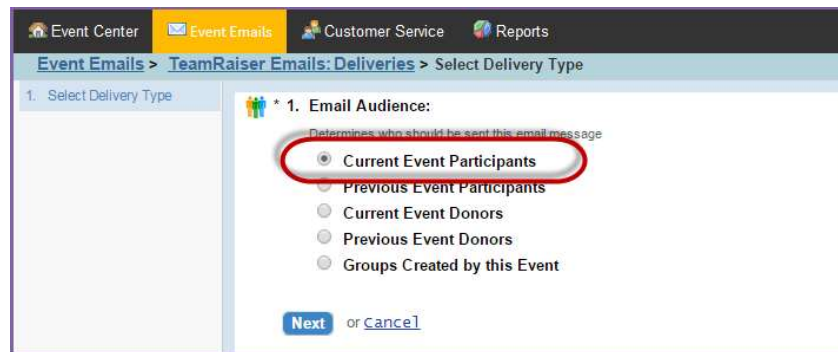
An Engagement Email is used to 'engage' your currently registered participants.

1. Locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.

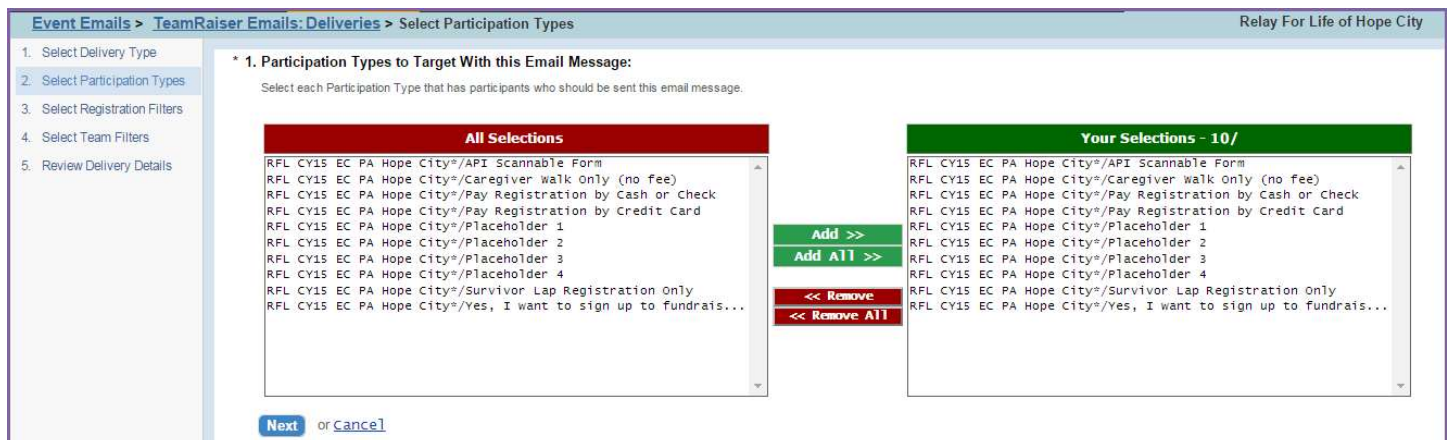


2. Select the **audience** to receive this email. When sending an Engagement Email Message, select **Current Event Participants**. (If you are sending a "Recruitment" email, [follow these step-by-step instructions](#).)

❖ **Never select Current or Previous Event Donors for your email audience.** Those contacts were 'recruited' by the family and friends they donated to, and we (ACS) cannot contact them. The participants should continue to maintain the relationship with donors.



3. Click Next.
4. Select Participation Types:
  - a. Highlight the group you wish to send the email to. Click the **Add** or **Add All** green buttons to select those groups.
  - b. To select multiple groups, hold **CTRL** as you select two or more groups.
  - c. Once all the appropriate groups have been added to the **Your Selection** box, click **Next**.



5. Apply any optional filters on the recipient list. Filters allow you to narrow the email recipient list by a number of factors such as team captain status or registration date. [See Appendix E for more information on the different filters](#)

*If you have any questions, please open an [event support case](#)*

[and how to use them!](#)

6. Registration Filters:

- a. No action is required in this step.
- b. If you do wish to apply a registration filter, select from the available Registration Filter options:
  - i. **Previous Event Participation Filter:** Filter the currently registered participant recipients of the email to whether or not they participated in the past.
  - ii. **Online/Offline Registration Filter:** Allow the email to be sent to both online and offline registrants.
  - iii. **Date Range:** Choose to filter the email recipients based on when they registered.
- c. Click **Next**

7. Team Filters:

- a. No action is required in this step.
- b. If you do wish to apply a team registration filter, select from the available Team Filter options:
  - i. **Team Membership Filter:** Identify if you wish to filter the currently registered participant email recipients by team captains, team members, or individual walkers.
  - ii. **Company Affiliation Filter:** Filter the email list further by the participants' corporate affiliation.
- c. Click **Next**

**Tip:** if you wish to send a message to *Team Captains Only* (for example: meeting notices), make sure only the "Team captain" box is checked so that the message will be sent to Team Captains registered for your event.

1. Delivery Details:  
Review the delivery details and use the Related Actions to define the schedule and recipients of this message. To display the number of projected recipients, use Calculate Audience. To make changes to the message, click Cancel to display the Delivery List and click the Messages tab to locate the message and return it to a Draft state where you can make changes.

Engagement Email 1 - Three helpful tips - "Duplicate Email Suppression Enabled"

**Schedule**  
Immediately (no schedule is set)

**Target Groups**  
This message is targeted for the following audience groups:

| Group   | Last Rebuilt             | Rebuild at Delivery |
|---|--------------------------|---------------------|
| RFL CY15 EC PA Hope City*/API Scannable Form                          | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 3                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Yes, I want to sign up to fundraise online! | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 1                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Caregiver Walk Only (no fee)                | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Pay Registration by Cash or Check           | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 2                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Survivor Lap Registration Only              | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Placeholder 4                               | Group is not rebuildable | No                  |
| RFL CY15 EC PA Hope City*/Pay Registration by Credit Card             | Group is not rebuildable | No                  |

[Help me with Rebuild at Delivery settings](#)

**Do Not Email Groups**  
This message will not be sent to anyone in the target audience who are members of the following Do Not Email groups:

| Group  | Last Rebuilt             | Rebuild at Delivery |
|--|--------------------------|---------------------|
| TeamRaiser Emails: Relay For Life of Deptford Opt Out.197006 | Group is not rebuildable | No                  |

[Help me with Rebuild at Delivery settings](#)

**Filters Applied** (About Email Filtering)  
After applying the filter conditions, this message will be sent to the target audience members who:

2. Ready to Send to Delivery Queue  
Send this email message to all of the members of the audience you have configured who have not already received a copy. Members who have already received a given message are automatically excluded.

**Send Immediately**

2. Ready to Send to Delivery Queue  
Send this email message to all of the members of the audience you have configured who have not already received a copy. Members who have already received a given message are automatically excluded.

**Send Immediately**

[cancel](#)

8. Review Delivery Details:

- a. Confirm the **target groups** are the email addresses that you wish to send the message to.
- b. The Unsubscribes or Opt Outs are automatically included in the **Do Not Mail List**.
- c. The Final Step is to click **Send Immediately**.

After selecting Send Immediately, the message will be immediately delivered to the recipients' inboxes and the email process will have been completed. (skip down to d. if you would prefer to schedule your email for a future date/time)



d. If you prefer to send the email at a later time, you can schedule the delivery of the message. Under Related Actions (left hand side of the page), click **Schedule**.

- i. Select the **date** and **time** you would like the message to be sent. **Note: All times are set to Central Standard Time.**
- ii. Click **Finish**.
- iii. Finally, return to the email delivery page and click **Send At Scheduled Time**. This places the message in a queue to be sent at scheduled date and time. This completes the email process.



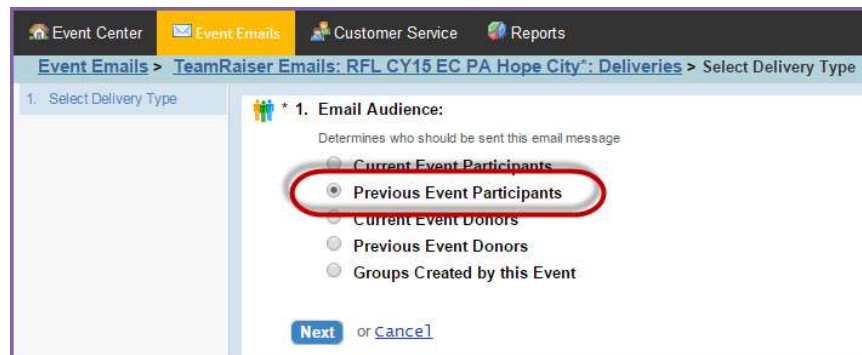
### Send a Recruitment Email to Prior Event Participants

A Recruitment Email is used to 'recruit' your past participants and invite them back to your event for the current season.

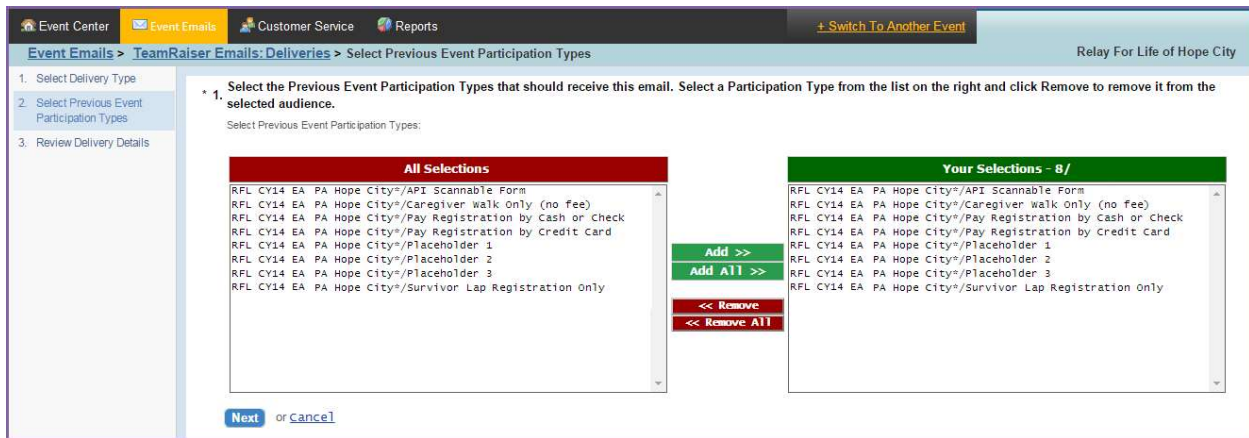


1. From the Message List tab, locate the customized and approved message you wish to send. Click **Begin Delivery** beside the email.
2. Select the **audience** who are to receive this email. When sending a Recruitment Email Message, select **Previous Event Participants**.

❖ **Never select Current or Previous Event Donors for your email audience.** Those contacts were 'recruited' by the family and friends they donated to, and we (ACS) cannot contact them. The participants should continue to maintain the relationship with donors.



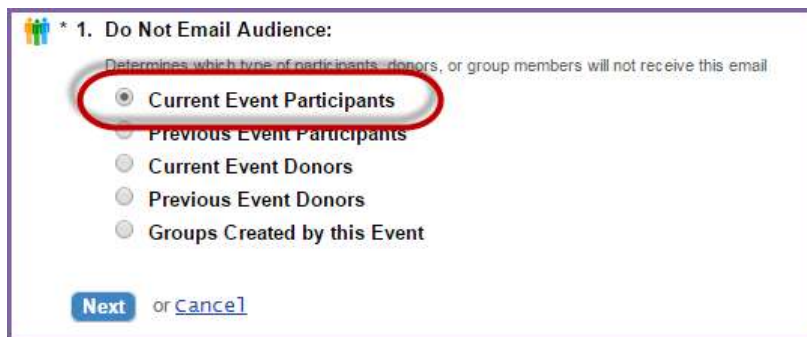
3. Click Next
4. Select Previous Event Participation Types:
  - a. Highlight the prior event participation types you wish to send the email to. Click the **Add** or **Add All** green buttons to select those groups.
  - b. To select multiple groups, hold **CTRL** as you select two or more groups.
  - c. Once all the appropriate groups have been added to the **Your Selection** box, click **Next**.



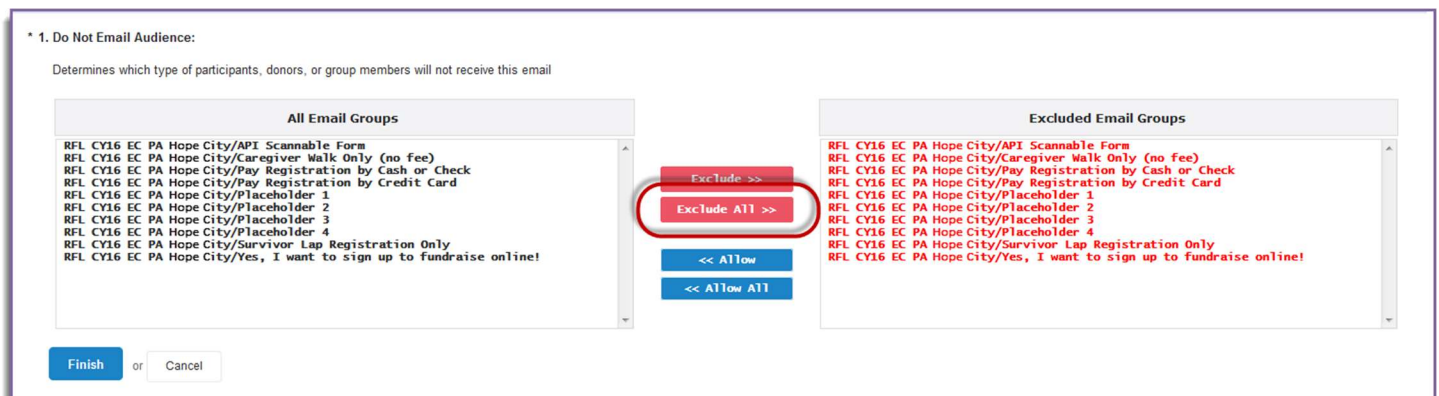
5. Review Delivery Details: **For Recruitment Emails, you MUST set up the current event participants as a 'Do Not Email' group** – since they are already registered, and we do not want to invite them again!
  - a. From the message review page, click the link to **Manage Do Not Email Groups** under Related Actions on the left.



6. Manage Do Not Email Groups: Select **Current Event Participants**



7. Click **Next**
8. Select Do Not Email Groups: Click **Exclude All >>** This will ensure that everyone already registered for your event will not receive an email asking them to register again.
  - a. Click **Exclude All>>**
  - b. Click **Finish**

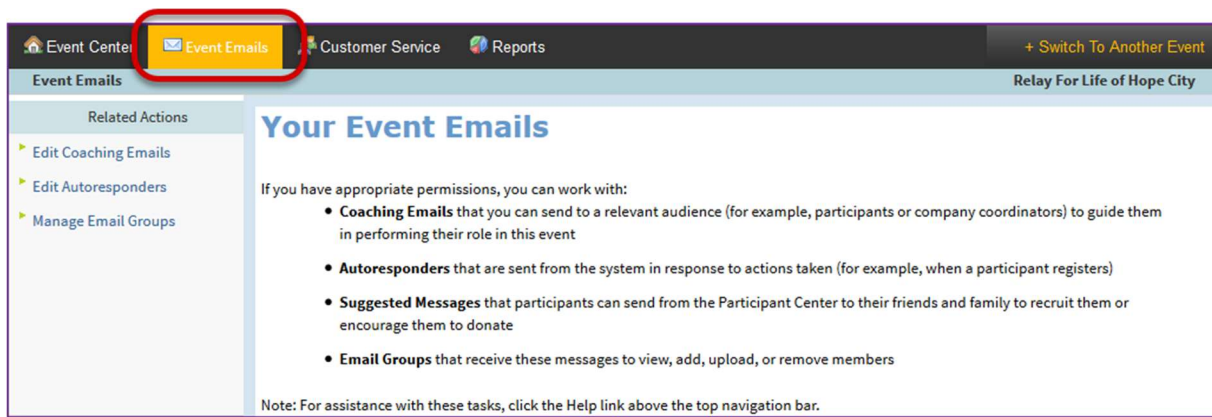


9. Review Delivery Details:
  - a. Confirm the **target groups** are the email addresses that you wish to send the message to.
  - b. The Unsubscribes or Opt Outs are automatically included in the **Do Not Mail List**. Make sure that all your **current event participation types** are also included in the Do Not Mail List.
  - c. The Final Step is to click **Send Immediately**. After selecting Send Immediately, the message will be immediately delivered to the recipients' inboxes and the email process will have been completed.
  - d. If you prefer to send the email at a later time, you can schedule the delivery of the message. Under Related Actions (left hand side of the page), click **Schedule**.
    - i. Select the **date** and **time** you would like the message to be sent. **Note: All times are set to Central Standard Time.**
    - ii. Click **Finish**.
    - iii. Finally, return to the email delivery page and click **Send At Scheduled Time**. This places the message in a queue to be sent at scheduled date and time. This completes the email process.

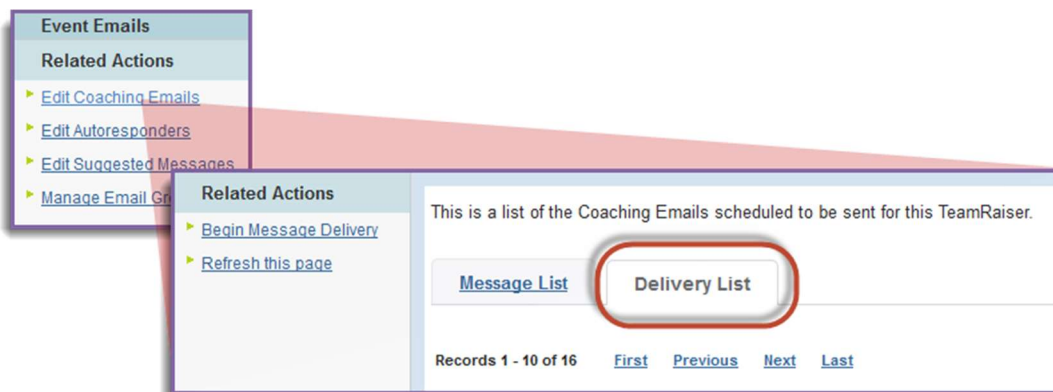


## Review Sent and Scheduled Messages

1. From the EMC, click **Event Emails**.



2. Under Related Actions, select **Edit Coaching Emails**.
3. Select the **Delivery List** tab.



4. From the Delivery List tab, you can:
  - a. Review the **Status** of your message as Sent or Schedule. The date of those deliveries or scheduled deliveries will appear in the **Schedule** and **Completed** columns.

- b. For Sent emails:
  - i. After the message has been sent, the **Open** and **Click Rates** of your message will allow you to monitor the success of each communication.
  - ii. Click **Review** to get further details on the delivery of the email.
- c. For Scheduled emails:
  - i. After the message has been scheduled, you may review when the message is set for delivery.
  - ii. Click **Cancel** to stop the message from being delivered or to change the delivery date/time.

The screenshot shows the 'Event Emails > TeamRaiser Emails: Deliveries' page. It displays a table of email delivery records. The table has columns for Delivery, Action, Status, Schedule, and Completed. Two rows are circled in red: 'Recruitment Email 1' (Sent) and 'Recruitment Email 2' (Scheduled). The 'Recruitment Email 1' row has 'Review', 'Resend', and 'Archive' buttons. The 'Recruitment Email 2' row has 'Review' and 'Cancel' buttons.

| Delivery   | Action  | Status               | Schedule               | Completed               |
|--|---|----------------------|------------------------|-------------------------|
| <b>Recruitment Email 1</b><br>Recruitment email template. Send to past participants and exclude current participants.<br>Number Sent: 270                                | <a href="#">Review</a><br><a href="#">Resend</a><br><a href="#">Archive</a> | Sent                 | Immediate              | Dec 3, 2014 11:53:59 AM |
| <b>Engagement Email 1 - Three helpful tips</b><br>Engagement email template. Send to current participants to encourage fundraising and team building.<br>Number Sent: 18 | <a href="#">Review</a><br><a href="#">Resend</a><br><a href="#">Archive</a> | Sent                 | Immediate              | Dec 2, 2014 3:10:42 PM  |
| <b>Recruitment Email 2</b><br>Recruitment email template. Send to past participants and exclude current participants.<br>Number Sent: 0                                  | <a href="#">Review</a><br><a href="#">Cancel</a>                            | Scheduled            | Dec 4, 2014 1:00:16 PM |                         |
| <b>Recruitment Email 1</b><br>Recruitment email template. Send to past participants and exclude current participants.<br>Number Sent: 0                                  | <a href="#">Begin Delivery</a><br><a href="#">Archive</a>                   | Partially configured | Immediate              |                         |