

How to send an email (instructions for administrators)

Staying in touch with your users is a good tool with which to inspire people to raise even more for your organization.

There are two ways to send emails through Rallybound (not including Fundraiser emails or Auto Responders). 1) Rallybound allows administrators to send emails directly from the admin panel through the "Send Emails" tab by following these steps:

1. Log in to the admin panel
2. Click "Emails" in the left sidebar
3. Click "Send Emails" in the left sidebar
4. Choose recipients — either by group or individually. Groups include:
 - a. All Donors
 - b. All Registrants
 - c. All Attendees
 - d. All Non-Attendee Registrants (a.k.a. Virtual Registrants, a.k.a. Fundraisers)
 - e. All Team Captains
 - f. All Non-Captain Team Members
 - g. All Solo Fundraisers (Fundraisers who are not on a team)
5. Schedule the email to go out immediately or specify a time in the future for the email to be sent
6. Choose a template and/or compose the email. Use [placeholders](#) to really personalize your message.
7. You may choose to exclude the email header and/or footer ([click here](#) to learn more about the email header and footer)
8. If you'd like to test your email before it is sent out, click "Test Email" at the top of the window. A test email will be sent to the administrator's email address.
9. To save the email as a template, click "Save as Template" at the top of the window
10. When the email is ready to go, click "Send" at the bottom

The screenshot displays the 'Email' configuration page in the Campaign Admin system. The interface is divided into a left-hand navigation menu and a main configuration area. The navigation menu includes sections for Home, Donations, People, Admin Users, Email, Settings, Registration Fields, Discount Codes, Site Content, Ticket Builder (Beta), Form Fields (Beta), Reports, and On-Site. The 'Email' section is currently active, showing options for sending emails, templates, auto responders, and headers. The main configuration area includes buttons for 'Test Email' and 'Save as Template'. It features several form fields: 'Recipients' with radio buttons for 'Choose Classes of Recipients' (selected) and 'Choose Individual Recipients'; 'Recipient groups' with checkboxes for 'All Donors', 'All Registrants', 'All Attendees', 'All Non-Attendee Registrants', and 'All Team Captains'; 'Schedule' with radio buttons for 'Now' and 'Specific Date/Time' (selected); 'Date / Time (PST/PDT)' with a date field (10/28/2015) and a time dropdown (1:00 PM); 'Template' with a dropdown menu (None Selected); 'Subject' with a text field (Attention ALL!!); and 'Disable Header?' with a checked checkbox. Below these fields is a rich text editor for the email body, containing the text 'This is a template I am going to create and save for later.' and a 'Send' button at the bottom.

The second way to send emails is through the **"Reports"** tab, which will allow you to send an email to all users within specific reports or filter the report based on certain parameters. The two reports that allow you to email Users are **Fundraisers and Teams** and **Registrants with Reg Fields, Donation, and Contacts Summary**.

1. Go into the Campaign Admin > Reports
2. Select the **Fundraisers and Teams** or **Registrants with Reg Fields, Donation, and Contacts Summary** you want to run and choose "Run Report"
3. If you want to send an email to all users without filtering select "select "Send Email"

Pacific Ocean (3819) super (3819) Global Search: Enter a Member or Team name, donation amount or a Hi danyelle@ral

Select Report: My Favorites, Donations, General, Members, RE, Salesforce, Teams, Custom Reports

Reports Home: Registrants with Reg Fields, Donation and Contacts Summary, Fundraisers and Teams, Donors including registration

Run Report, Run CSV Download, Save as..., Show Grid Only, **Export Excel**, Send Email, Send to Dropbox, Send to MailChimp

Parameters for Registrants with Reg Fields, Donation and Contacts Summary Report

Start Date (inclusive): End Date (inclusive):

Registrants with Reg Fields, Donation and Contacts Summary

RegistrationID	UserAccountID	MemberID	Title	FirstName	LastName	Suffix	Email	Personal Cam	Address
39363							afadl@dfadf...		
51921							danyellealyc...		
39357							cat@sportab...		1365 Overbr...
50081							cattberry@...		3800 Maple ...
48131							me@davebo...		121 Bonchurc
42690							Billy@bob.com		
38962							ztakappaphil...		
389629	1548500	1073858		Brianna	Brockhaus		ztakappaphil...		
488509	1833811	1426393		Austin	Church		hi@me.com		
407605	4507874	4124985		Kimberly	Cook Allen		kimballan		

- To refine your list you will go to the correct column, select the down arrow and enter the parameter you are looking for. For example, if you wanted to send an email to all fundraisers who have raised more than \$100 I would go to "Amount Raised" and enter "> 100", like the example shown below.

Pacific Ocean (3819) super (3819) Global Search: Enter a Member or Team name, donation amount or a Hi danyelle@ral

Select Report: My Favorites, Donations, General, Members, RE, Salesforce, Teams, Custom Reports

Reports Home: Registrants with Reg Fields, Donation and Contacts Summary, Fundraisers and Teams, Donors including registration

Run Report, Run CSV Download, Save as..., Show Grid Only, Export Excel, Send Email, Send to Dropbox, Send to MailChimp

Parameters for Registrants with Reg Fields, Donation and Contacts Summary Report

Start Date (inclusive): End Date (inclusive):

Registrants with Reg Fields, Donation and Contacts Summary

RegistrantDon	RegistrationFe	GoalID	GoalAmount	Page Active	Amount Ra	Registrations	Total Amount	Total Amount	Total Amount	Discour
\$0.00	363424	\$300.00	true	\$155.00	↑ Sort Ascending	00	\$0.00	\$155.00		
\$0.00	361896	\$1,000.00	true	\$400.00	↓ Sort Descending	00	\$250.00	\$400.00		
\$0.00	464127	\$1,000.00	true	\$450.00	Columns	00	\$0.00	\$450.00		
\$0.00	343574	\$1,005.00	true	\$125.00	Group by this field	00	\$0.00	\$125.00		
\$0.00	362685	\$1,000.00	true	\$435.00	Show in groups	00	\$0.00	\$435.00		
\$0.00	329763	\$500.00	true	\$700.00	Filters	00	\$0.00	\$700.00		
\$0.00	464755	\$1,000.00	true	\$300.00	Enter Number	00	\$0.00	\$300.00		
\$0.00	330853	\$1,000.00	true	\$665.00	100	\$95	\$0.00	\$665.00		
\$0.00	464746	\$1,000.00	true	\$200.00	200	\$200	\$0.00	\$200.00		
\$0.00	329772	\$1,000.00	true	\$250.00	250	\$250	\$0.00	\$250.00		
\$0.00	357909	\$1,000.00	true	\$110.00	110	\$110	\$0.00	\$110.00		

- Once you have your list refined you can then choose to "Send Email".

With that being said, Rallybound integrates with Constant Contact and Mail Chimp. We recommend using these email marketing tools for advanced email sends.