

How to create a default fundraiser email template (instructions for administrators)

Fundraiser email templates allow fundraisers to reuse often-used emails that they send to their contacts (potential donors). This precludes the need to rewrite the same email multiple times. If a template is set by an administrator, it becomes available globally to all fundraisers as a default template. This gives administrators a great way to encourage fundraisers to send different types of emails, like asking to donate or joining the cause. To create a new default template, follow these steps:

1. Log in to the admin panel
2. Click "Email" in the left sidebar
3. Click "Fundraiser Email Templates" in the left sidebar
4. Click "Add Template" in the top left
5. Enter name for the template
6. Select whether to disable the email so it doesn't appear in the fundraiser's email composer
7. Select "For Team Captain" to make this template available only to team captains
8. Enter subject for the template
9. Compose the body of the message. Use placeholders to include event information and each particular fundraiser's information in their email template (this does not personalize the email for the end-recipient; the template is generated personalized to the fundraiser, saving them the effort of adding event information or their own information).
10. Click "Save" at the bottom
11. If you'd like to see what the email will look like, click "Test Email" at the top of the window, and an email will be sent to the administrator's email address.

The screenshot shows the admin panel interface. On the left, a sidebar contains navigation links: Home, Donations, People, Admin Users, Email (with sub-links: Send Emails, Admin Email Templates, Fundraiser Email Templates, Auto Responders, Header and Footer, Pending Admin Emails, Sent Admin Emails, Sent Auto Responders), Settings, Registration Fields, Discount Codes, Site Content, Ticket Builder (Beta), Form Fields (Beta), Reports, and On-Site.

The main content area is titled "Fundraiser Email Template: Outreach to potential donors". It features a table of templates and a detailed editor for the selected template.

Template Name	Enabled	For Team Captain
<input checked="" type="checkbox"/> Outreach to potential donors	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Test designed	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The editor for the "Outreach to potential donors" template includes the following fields and content:

- Template Name:** Outreach to potential donors
- Disable?**
- For Team Captain?**
- Order Number:** 100
- Subject:** Please help me fundraise
- Body:**

I am participating in an amazing event this year and I wanted to ask for your support.

I am raising money for {{Org_Campaign.Name}} to raise awareness and make a measurable difference.

Please consider donating to my cause here:
[{{Fundraiser.Fundraising_Page}}](#)

If you are feeling extra generous, please consider sharing my page with your network.

Thank you in advance for your support!

Sincerely,
{{Fundraiser.First_Name}}

Buttons for "Edit", "Test Email", and "Delete Template" are located at the top of the editor. A "Save" button is at the bottom.