

How to create an automated email

Automated emails are a powerful tool that allows administrators to set a range of criteria which will automatically generate and send personalized emails when triggered. Combining triggers with placeholders makes this tool even more powerful by generating completely personalized emails.

To create a new automated email, follow these steps:

1. Log in to your admin (yoursite.com/admin)
2. Click "Email" in the left sidebar, then click "Auto-Responders"
3. Click "Add Custom Email" in the top of the window
4. Add a Template Name
5. Select condition from the list and add appropriate values (For example: Add 10 in the "donations received" if the email should be sent when the fundraiser receives their tenth donation)
6. Compose the email as usual, including the subject and body. (See [here](#) for more on composing emails.) Click "Save".
7. If the conditions are not available on the list or the email requires two or more conditions, please see the next instructions below.

The screenshot shows the 'Add Custom Email' button highlighted with a red arrow in the top right corner of the main interface. The 'Add Template' modal window is open, showing the following configuration:

- Automation: 3 days after registration
- Trigger: 50 percent of goal raised, 100 dollars raised, 10 donations received
- Disable?:
- Disable Header?:
- Disable Footer?:
- Subject: [Empty field]
- Body: [Rich text editor with toolbar]

To create a new trigger with two or more conditions, follow these steps:

1. Determine the emails you will want to send, along with the criteria that will trigger them (see [here](#) for some examples). Not everything will be possible — we'll let you know if it's not.
2. Log in to your admin (yoursite.com/admin)
3. Click "Email" in the left sidebar, then click "Admin Email Templates"
4. Click "Add Template" in the top of the window
5. Prepend the template name with "Automated Email — ", then describe what should trigger the email. For example: "Automated Email — Send email to user upon receiving tenth donation"
6. Compose the email as usual, including the subject and body. (See [here](#) for more on composing emails.) Click "Save".
7. Contact us at helpdesk@rallybound.com with your campaign URL, and notify us that these emails are ready to be set up. We will notify you when they are live.

