

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

Fundraiser email templates allow fundraisers to reuse often-used emails that they send to their contacts (potential donors or fundraisers). This precludes the need to rewrite the same email multiple times. If a template is added 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 at admin.rallybound.com
2. Navigate to the campaign on which to create this template
3. Click the "Fundraising" tab
4. Click "Email Templates" in the left sidebar
5. Click "Add Template" in the top left
6. Enter a name for the template — template names will be listed to the fundraiser so that they can choose a template
7. Select whether to disable the email so it doesn't appear to fundraisers — this is useful if you're still drafting the template
8. Select "For Team Captain" to make this template available only to team captains
9. Enter an email subject for the template
10. 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).
11. Click "Save" at the bottom
12. 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.

