

Email Guide

10/31/2016 Blackbaud NetCommunity 7.1 Email US

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Email

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Email contains Messages, Newsletters, Templates, Lists, Acknowledgements, eCards templates, Invalid accounts, Campaigns, and Notifications. When you create an email message in the program, you first create an email template. Next, you create the list of email recipients. Lastly, you select the type of email to send: message, newsletter, or acknowledgement.

Tip: For best practice information about email, refer to [Blackbaud Communication Services Best Practices for Email](#).

In *Invalid accounts*, you can view email address accounts reported as “invalid” by their host Internet Service Provider (ISP). For example, an ISP may report an email address account as invalid due to a nonexistent or canceled account. Typical causes of an invalid account occur when the email address contains a typographical error or the email account is canceled due to inactivity.

When you host multiple sites, you can create email for individual sites. To do this, log in to the site and create the email. For more information, see the *Administration Guide*.

Show Me: Watch an [overview of the email process](#).

Email Campaigns

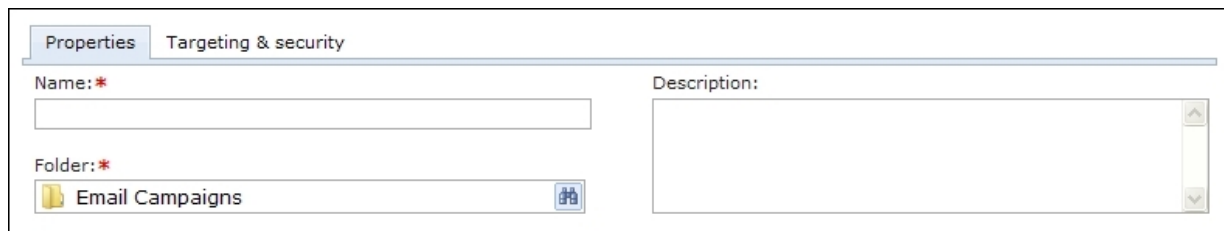
In *Campaigns*, you can create campaigns using email sent to targeted lists. For example, during tax season, your organization asks its members to donate their tax refunds to help buy food for rescued animals living in a shelter. You can create a series of email messages that are tailored for specific audiences. With A/B split testing, you can identify the messages that are most effective for each email list.

Create Campaigns

Campaigns records store related email appeals and their associated email lists and messages. You can create multiple campaign folders to organize related email campaigns.

> Create an email campaign

1. From *Email*, click **Campaigns**. *Campaigns* appears.
2. Click **New campaign**. The New Email Campaign screen appears.

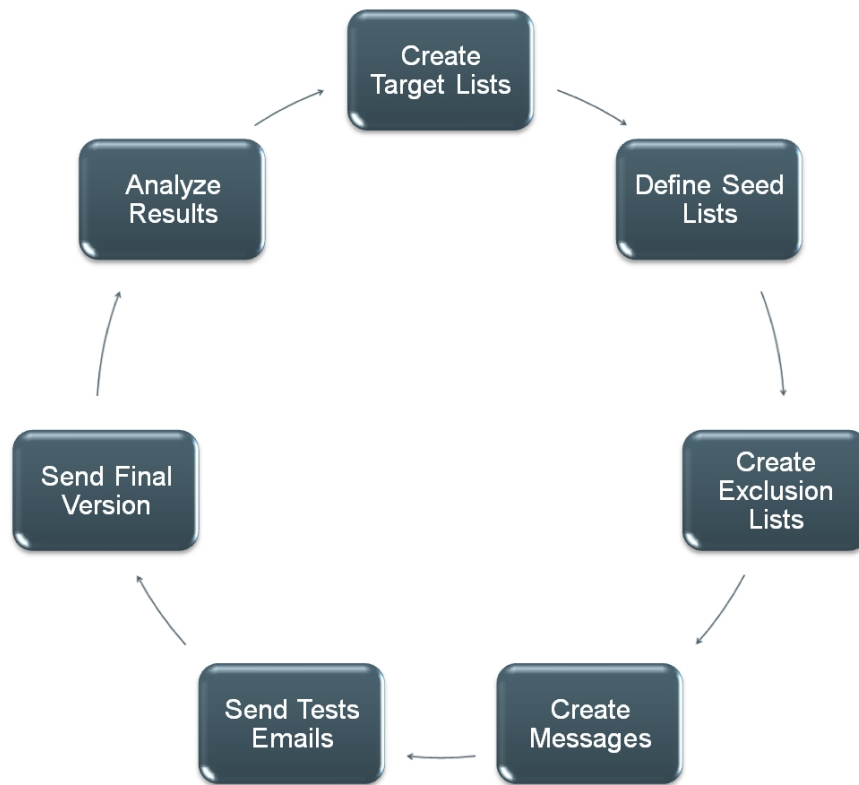


3. In the **Name** field, enter a name for your email campaign.
4. In the **Description** field, enter a description such as the campaign’s goal or theme.
5. In the **Folder** field, select a folder to store the campaign. If you do not select a folder, the program saves the campaign in the root **Email Campaigns** folder.
6. To assign security rights for the campaign, select the Targeting and security tab. For each user role, you can manage rights to view, edit, delete, and change security. To add users or roles, click **Add users and roles**.
7. Click **Save**. You return to *Campaigns*.

Create Appeals

You can create multiple email appeals and test the effectiveness of each message. The Appeal Wizard is a series of tabs that guides you through creating one. On these tabs, you select the email lists and messages for the appeal, send test and final email messages, and view the results. You can view message and target list summary reports to monitor the success of individual messages and target lists. You can also view the appeal summary report to evaluate the success of all messages and lists associated with the appeal.

The flowchart provides an overview of the appeal creation process.



> Create an appeal

1. From *Campaigns*, find the email campaign to add the appeal to. In the upper right pane, the campaign appears. In the bottom pane, any appeals previously created for the campaign appear.
 - To find a campaign from the Folders tab, select the folder that contains the campaign.
 - To find a campaign from the Search tab, search for the campaign by name.
2. Click **New appeal**. The New Appeal screen appears.

3. In the **Name** field, enter a name for the email appeal.
4. In the **Description** field, enter a description that identifies the appeal.
5. Click **Next**. The Appeal Wizard appears and opens to the 1: Target Lists tab. For information about this tab, see [Complete the 1: Target Lists tab on page 7](#).

➤ Complete the 1: Target Lists tab

On the 1: Target Lists tab, you select email lists containing the primary recipients you are targeting for your appeal. You select email lists saved in *Lists*; these can be query-based or imported. For more information about email lists, see [Lists on page 65](#).

1. From the 1: Target Lists tab, click **Insert target list**. The Select Lists screen appears.
2. To add an email list, select the list on the left and click **Add** to move it into the **Selected lists** box. Add each list as required.
3. Click **OK**. You return to the 1: Target Lists tab. In the grid, the selected lists appear.
4. In the **Action** column, view a summary report or the properties of the selected target list. You can also remove the selected target list from the appeal.
 - To view a summary report for the selected target list, click **Click here to view report**. The tabs on this report display the same information as the Target List Results on the Results tab. For more information, see [Complete the 7: Results tab on page 11](#).
 - To view the selected target list's properties, click **Click here to view/edit this target list's properties**. On the List Properties tab, view the list's data source and query or import file name. The **List status** box displays whether the program loaded the list successfully or if there are any errors. On the View List tab, view a list of all recipients included in the list. On the List Templates tab, view a list of all templates associated with the selected list. On the List Messages tab, view a list of all messages sent to the selected list.
 - To remove the selected target list from the appeal, click **Click here to delete this target list**.
5. In the **Data source** column, view the data source for the lists, such as a query of constituents or an imported list.
6. If a problem exists with a selected list, the error appears in the **Loaded status** column. To resolve the error, exit *Campaigns* and open the email list in *Lists*, where you can edit the queries that make up the list or replace the *.csv file that creates an imported list. If the list is imported, you can also change the field mapping for the email address and the recipient display name. For information about how to edit a list, see [Lists on page 65](#).

Note: Each recipient in a target list receives one email from the appeal. After you add a target list, you can run a duplicate search to identify any email addresses that appear in more than one target list. For more information about duplicate searches, see [Search for duplicate email addresses on page 13](#).

7. To select the seed lists that contain the recipients to copy on all test messages, select the 2: Seed Lists tab. For information about this tab, see [Complete the 2: Seed Lists tab on page 8](#). To save and return to *Campaigns*, click **Return**.

➤ Complete the 2: Seed Lists tab

On the 2: Seed Lists tab, you select seed lists that contain the recipients to copy on all test messages. These are typically people in your organization who track the progress of the appeal. On the Lists tab of the appeal summary report, you can view the statistics for test messages sent to seed lists. Seed lists are excluded from statistics on all other tabs of the report, such as the Messages Sent and Click-throughs tab.

1. From an open appeal, select the 2: Seed Lists tab.
2. Click **Insert seed list**. The Select Lists screen appears.
3. To add a seed list, select the list on the left and click **Add** to move it into the **Selected lists** box. Add each list as required.
4. Click **OK**. You return to the 2: Seed Lists tab. In the grid, the selected lists appear.
5. In the **Action** column, you can view a summary report or the properties of the selected seed list. You can also remove the selected seed list from the appeal.
 - To view a summary report for the selected seed list, click **Click here to view report**.
 - To view the selected seed list's properties, click **Click here to view/edit this Seed List's properties**. On the List Properties tab, view the list's data source and query or import file name. The **List status** box displays whether the program loaded the list successfully or if there are any errors. On the View List tab, view a list of all recipients included in the list. On the List Templates tab, view a list of all templates associated with the selected list. On the List Messages tab, view a list of all messages sent to the selected list.
 - To remove the selected seed list from the appeal, click **Click here to delete this Seed List**.
6. In the **Data source** column, view the data source for the lists, such as a query of constituents or an imported list.
7. If a problem exists with a selected list, the error appears in the **Loaded status** column. To resolve the error, exit *Campaigns* and open the email list in *Lists*, where you can edit the queries that make up the list or replace the *.csv file that creates an imported list. If the list is imported, you can change the field mapping for the email address and the recipient display name. For information about how to edit a list, see [Lists on page 65](#).
8. To select the exclusion lists that contain the recipients to exclude from all email sent for this appeal, select the 3: Exclusion Lists tab. For information about this tab, see [Complete the 3: Exclusion Lists tab on page 9](#).

To save and return to *Campaigns*, click **Return**.

➤ Complete the 3: Exclusion Lists tab

On the 3: Exclusion Lists tab, you select exclusion lists that contain recipients to exclude from all email sent for the appeal. Exclusion lists allow you to exclude recipients without editing the existing target list. For example, if you send a follow-up email to an appeal, you can exclude recipients who donated as a result of the previous email.

1. From an open appeal, select the 3: Exclusion Lists tab.
2. Click **Insert exclusion list**. The Select Lists screen appears.
3. To add an exclusion list, select the list and click **Add**. It appears under **Selected lists**. Repeat for each list to add.
4. Click **OK**. You return to the 3: Exclusion Lists tab. In the grid, the selected lists appear.
5. In the **Action** column, view the properties of the selected exclusion list. You can also remove the selected exclusion list from the appeal.
 - To view the selected exclusion list's properties, click **Click here to view/edit this Exclusion List's properties**. On the List Properties tab, view the list's data source and query or import file name. The **List status** box displays whether the program loaded the list successfully or if there are any errors. On the View List tab, view a list of all recipients included in the list. On the List Templates tab, view a list of all templates associated with the selected list. On the List Messages tab, view a list of all messages sent to the selected list.
 - To remove the selected exclusion list from the appeal, click **Click here to delete this Exclusion List**.
6. In the **Data source** column, view the data source for the lists, such as a query of constituents or an imported list.
7. If a problem exists with a selected list, the error appears in the **Loaded status** column. To resolve the error, exit *Campaigns* and open the email list in *Lists*, where you can edit the queries that make up the list or replace the *.csv file that creates an imported list. If the list is imported, you can also change the field mapping for the email address and the recipient display name. For information about how to edit a list, see [Lists on page 65](#).
8. To create test messages for each target list, select the 4: Messages tab. For information about this tab, see [Complete the 4: Messages tab on page 9](#).

To save and return to *Campaigns*, click **Return**.

➤ Complete the 4: Messages tab

On the 4: Messages tab, you create test messages for each target list.

1. From an open appeal, select the 4: Messages tab.
2. For all the target lists, create each message.
 - a. Select a list in the Target List pane and click **New message**. The Select Template screen appears.
 - b. In the **Template** field, select an email template for the message. The templates that appear in the list are those associated with the target lists type. For example, if the target list is

based on a query of constituents, templates with "Constituents" or "Generic" selected in the **Data source** field appear.

- c. Click **Next**. The Email Properties screen appears.
- d. In the **Name** field, enter a unique name to help identify the email.
- e. In the **Issue date** field, the current date and time appear automatically. To edit the issue date, enter a different date and time.
- f. The bottom pane displays the email's default content. You can use the HTML editor to change the message's content, appearance, and layout.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.

- g. To save the message, click **Save**. You return to the 4: Messages tab.
3. To set test parameters for each message, select the 5: Send Tests tab. For information about this tab, see [Complete the 5: Send Tests tab on page 10](#).

To save and return to *Campaigns*, click **Return**.

➤ Complete the 5: Send Tests tab

On the 5: Send Tests tab, you set test parameters for each message. You can test variables for each message, such as the message's content, subject line, scheduled time of departure, and the name and email address used for sending. You can also define the sample size for each test message.

1. From an open appeal, select the 5: Send Tests tab.
2. To create test parameters for a message, select a list in the Target List pane and select a message in the Messages for <Target List> pane.
3. For each message, set the test parameters.
 - a. In the Test Message Parameters pane at the bottom, the **Subject**, **Send date**, and **From** fields display the default values from the message's email template. You can enter new values for these fields.
 - b. In the **Sample size** field, specify how many recipients included in the target list are to receive the test message.

To send the test message to a percentage of the recipients, select "Percent of list" and enter the percentage of recipients.

To send the test message to a specific number of the recipients, select "Recipients" and enter the number of recipients.

Note: To send the test message to the entire target list, select "Percent of list" and enter "100%," or select "Recipients" and enter the total number of eligible records in the target list.

- c. Specify whether to send the test message now or later.

To send the test message now, click **Send test message**. The test parameters are disabled, and the Status displays "Processing" as the email messages processes. After the email is processed, click **Refresh**. The Status displays "Sent."

To save the test parameters and send the test message at a later time, click **Save**. When you later open the appeal, you can then click **Send test message** to send the message.

4. To send the message that has the best test results to all remaining recipients for each target list, select the 6: Send Final tab. For information about this tab, see [Complete the 6: Send Final tab on page 11](#).

To save and return to *Campaigns*, click **Return**.

➤ Complete the 6: Send Final tab

On the 6: Send Final tab, you can send the message with the best test results to all the remaining recipients, such as those who did not yet receive an email, in a target list. This message is not sent to any seed list recipients.

1. From an open appeal, select the 6: Send Final tab.
2. Select a target list. In the Results of Test Messages pane on the right, all the test messages for that list appear.
3. To identify the most successful test message, select each message and view its results.
4. Select the message to send as the final message to all remaining recipients in that target list and click **Send as final**. A confirmation message appears.
5. Click **OK**. The Final Status displays "Processing" as the final email messages are sent.
6. After the email is processed, click **Refresh**. The Final Status displays "Sent."
7. To view the results for each target list, select the 7: Results tab. For information about this tab, see [Complete the 7: Results tab on page 11](#).

To save and return to the Campaigns, click **Return**.

➤ Complete the 7: Results tab

On the 7: Results tab, you can view the results for each target list.

1. From an open appeal, select the 7: Results tab.
2. In the **Target lists** box on the left, select a list. In the box on the right, information about the target list appears. To view information about the list's results, select the applicable tab.
 - To view a pie chart of the percentage of messages that are sent and not sent to the selected list, select the Summary tab. A table displays the number of sent and not sent messages to the list and the total number of recipients.
 - To view a pie chart of the opened, unopened, and undelivered messages sent to the selected list, select the Sent tab. A table breaks down the number of opened, unopened, and undelivered messages by the total number sent email to the list, the percentage of sent email, and the percentage of total messages.

The **% of Sent** column displays the percentage of opened and unopened email, excluding those that are undelivered. The **% of Total** column includes all email, including the undelivered.

- To view the pages the recipients in the target list access from links in the message, select the Click-throughs tab.
 - To view the transactions generated by the recipients in the target list as a result of the email message, select the Conversions tab.
 - To view summary information about each message sent to the target list, select the Message tab. To view a summary report about a specific message, click the message's name in the **Test message** column. For more information about the message summary report, see [View a message summary report on page 12](#).
3. Click **Save**.
 4. To return to Campaigns, click **Return**.

➤ View a message summary report

The message summary report contains information about a specific email message.

1. From an open appeal, select the 7: Results tab.
 - To view the delivery status of the message, select the Delivery summary tab. A pie chart displays the percentage of messages sent and not sent and a table displays the total number of messages sent and not sent.
 - To view a pie chart of the opened, unopened, and undelivered messages, select the Messages sent tab. A table breaks down the number of opened, unopened, and undelivered messages by the total number sent email, the percentage of sent email, and the percentage of total messages.

The **% of Sent** column displays the percentage of opened and unopened email, excluding those that are undelivered. The **% of Total** column includes all email, including the undelivered.

- To view the pages the recipients access from links in the message, select the Click-throughs tab.
- To view the transactions generated by the recipients as a result of the message, select the Conversions tab.
- To view a breakdown of message results for each target list, select the List details tab. To view a summary report about a specific target list, click the list's name.
- If the message included conditional content, the Conditional Content tab appears. The grid lists statistics about how each condition in a content block performed. It includes the number of recipients that received the condition, the number who opened the email, the number of click-throughs, the number of conversions (transactions), and the total gift amounts. For more information about conditional content, see [Add Conditional Content on page 22](#).

Note: To view an Email Status Report, click **Status report** on the Summary tab. The Email Status report contains the time and date the program created, prepared, processed, uploaded, and accepted the message.

2. To view all the recipients of the message, select the Recipients tab. The grid displays each recipient's name and email address and the date and time the message was sent. If the message bounced or was opened, the date and time are also included.
3. To view details about the email and preview the message's content, select the Properties tab.
4. To close the report, click **OK**. You return to the 7: Results tab.

5. To return to Campaigns, click **Return**.

➤ View an appeal summary report

The appeal summary report provides a current snapshot of the appeal's results. This report includes information about all messages sent to lists as part of the appeal.

1. From *Campaigns*, under **Appeals**, select the appeal.
2. In the **Action** column, click **Click here to review report**. The Appeal Summary Report screen appears. On this screen, you can select tabs to view information about the email results.
 - To view the recipient summary of all messages sent for the appeal, select the Delivery summary tab. A pie chart displays the percentage of messages sent and not sent, and a table displays the total number of messages sent and not sent.
 - To view a pie chart of the opened, unopened, and undelivered messages, select the Messages sent tab. A table breaks down the number of opened, unopened, and undelivered messages by the total number of sent email, the percentage of sent email, and the percentage of total messages.

The **% of Sent** column displays the percentage of opened and unopened email, excluding those that are undelivered. The **% of Total** column includes all email, including the undelivered.

- To view a pie chart showing the percentage of messages that were not sent for the appeal because of opt-outs, no addresses, and invalid accounts, select the Messages not sent tab. A table breaks down the number of opt-outs, no addresses, and invalid accounts by the total number of messages not sent, the percentage of messages not sent, and the percentage of total messages.

The **% of Not Sent** column displays the percentage of messages not sent. The **% of Total** column includes all email sent and not sent, including those delivered successfully.

- To view the pages the recipients access from links in messages sent for the appeal, select the Click-throughs tab.
 - To view the transactions generated by the recipients as a result of messages sent for the appeal, select the Conversions tab.
 - To view a breakdown of message results for each target list, select the List details tab. To view a summary report about a specific target list, click the list's name. The tabs on this report display the same information as the Target Lists Summary Report on the Results tab.
3. To close the report, click **OK**. You return to the Wizard screen.

➤ Search for duplicate email addresses

You can search for email addresses that appear in more than one target list.

1. Access the Search for Duplicates screen.
 - From *Campaigns*, click the **Duplicate search** button for the appeal to search for duplicates.
 - From the Appeal Wizard screen for the appeal, click **Duplicate search** to search for duplicates.
2. Select the Duplicate Search tab.

3. To run the duplicate search, click **Start**. The Search Status displays “This appeal has been queued for searching.” The amount of time the search is queued can be longer than 30 minutes. These items determine how long a search is queued:
 - The intervals set under **List acquisition and refresh** on the Settings tab in *Sites & settings*. If you start a duplicate search while a list is being refreshed, there may be a delay because the search cannot begin until the list refresh is complete. For more information, see the *Administration Guide*.
 - The number of lists queued for refresh before the search. Those lists must refresh before the duplicate search can begin.
4. When the search is queued, close the Duplicate Search screen.
5. After the search is complete, open the Duplicate Search screen again. The Search Status displays “This appeal has been successfully searched” and a grid displays any email lists that contain duplicate email addresses.
6. To view email addresses that appear in multiple target lists, select the Duplicate Records tab.
7. The grid displays the email addresses that appear in multiple target lists. Using the filter options at the top of the grid, you can filter the list of duplicates by email address, recipient name, or target list.

Note: Search results on the Duplicate Records tab are not dynamic. The records that appear in the grid are those from the last search. Any changes made to target lists since the last search, such as due to reacquiring, adding, and removing, do not appear. To update the search results, click **Start** to run the search again.

8. To close the Duplicate Records screen, click **Close**.

Templates

Warning: It is important that your organization assigns full Administrator rights to only a select number of users for *Templates*. Any changes can affect multiple web pages. We strongly encourage users knowledgeable in all areas of website design to perform tasks in *Templates*.

In *Templates*, you design and maintain email templates to provide consistency for various types of email. For example, you can have an organization template with a header and font used to send email to all alumni. On the Properties tab, you set defaults for the messages created from the template, such as the from name and subject. On the Design tab, you design the basic layout for the template, including any graphics or pictures.

Tip: For best practice information about email, refer to [Blackbaud Communication Services Best Practices for Email](#).

Show Me: Watch [how to create an email template](#).

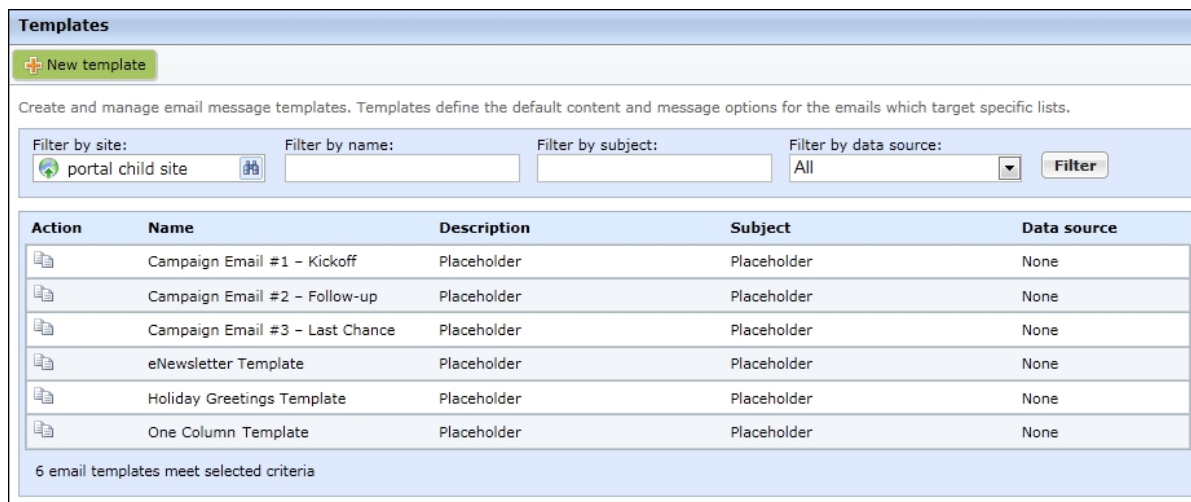
When you create an email message, you base the message on a template to save time and effort. All the elements exist in the template. You can change a specific message, but the template provides a base that helps maintain consistency.

Note: In each email you send, you must include links to the pages on your website that contain your organization's privacy statement and the User Email Preferences Form so recipients can opt out of your email communications. We recommend you include these links in email templates.

Mobile Friendly Email Templates

To improve your email marketing for mobile users, six mobile friendly email templates are available for you to copy and use as new templates. These templates are more narrow in width and include larger fonts for improved usability for a specific mobile device, such as a smartphone or tablet.

You can easily identify these in the email templates grid by viewing templates with "Placeholder" in the **Description** column. One copy of each mobile friendly email template exists in the program. When you host multiple websites, you access them in each site's *Templates* area.



Templates

+ New template

Create and manage email message templates. Templates define the default content and message options for the emails which target specific lists.

Filter by site: portal child site Filter by name: Filter by subject: Filter by data source: All Filter

| Action | Name | Description | Subject | Data source |
|--------|---------------------------------|-------------|-------------|-------------|
| | Campaign Email #1 - Kickoff | Placeholder | Placeholder | None |
| | Campaign Email #2 - Follow-up | Placeholder | Placeholder | None |
| | Campaign Email #3 - Last Chance | Placeholder | Placeholder | None |
| | eNewsletter Template | Placeholder | Placeholder | None |
| | Holiday Greetings Template | Placeholder | Placeholder | None |
| | One Column Template | Placeholder | Placeholder | None |

6 email templates meet selected criteria

To use these templates, create a copy of one and update the placeholder text in the new template with your unique content. For example, you can replace the merge field placeholder text with merge fields in the HTML editor. You can also replace the sample logo banner with your organization's logo banner.

Tip: These templates are mobile friendly but not responsive; they do not render differently across diverse devices.

➤ Design an email template

You do not send email messages or select email recipients from *Templates*. You send email messages from *Messages* and save email recipients as email lists in *Lists*. For more information about how to send email messages, see [Messages on page 30](#). For more information about email lists, see [Lists on page 65](#).

Tip: For best practice information about email, refer to [Blackbaud Communication Services Best Practices for Email](#).

Show Me: Watch [how to create an email template](#).

1. From *Email*, click **Templates**. *Templates* appears.
2. Click **New template**. The New template page appears.

3. On the Properties tab, enter a name for the email template in the **Template name** field. Keep in mind that you use the template for all email messages of this type.
4. In the **Description** field, enter additional information about the template such as a brief description or notes about the template.
5. In the **Data Source** field, select the data source. The Data source determines which type of list can be used for messages created from the template and which merge fields are available when you write email content. When you set a data source on a template, messages created from the template can be sent to only lists that use the same type of data source. For more information about the types of data sources, see [Template Data Sources on page 19](#).
6. If you select "Constituents," the **Email address type** field appears and defaults to use the constituent's primary email address. To use a different email type when messages are sent using this template, select it from the list. When a constituent does not have the email address type you select in the field, the message is sent to their primary email address. When a constituent does not have either address, it is sent to the email address that matches the phone type mapped to **Email** under **Phone type mapping** on the Settings tab in *Sites & settings*.

Note: To change the email address type a message inherits from its template, select it from the

Email address type field when you create the message. For more information, see [Design and send an email message on page 31](#).

7. In the **Subject**, **From Name**, and **From Address** fields, enter a default subject to include in the **Subject** field of email messages you create with the template, as well as an email address and name to include in the **From** field of email messages. When you create email messages, you can overwrite the subject.

Note: Because you do not send email from *Templates*, the program does not include recipients in the **Send to** field in the email template. The program saves the recipients as an email list in *Lists*. For information about email lists, see [Lists on page 65](#).

8. To receive responses from recipients at a different email address than the one you use to send the message, enter a return address in the **Reply Address** field.
9. To receive failure messages when email messages are not delivered, select **Failure to send notification**. In the **Notification email address** field, enter an email address to receive failure messages.

Note: Failures are email addresses that do not receive the messages. Failure can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN). For information about how the program handles failures, see [Bounced Email Management on page 42](#).

10. To assign security rights for the email template, select the Targeting & Security tab. For each user role, you can manage rights to view, edit, delete, and change security.

| Action | User/Role Name | View | Edit | Delete | Change Security |
|--------|----------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| | Everyone | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

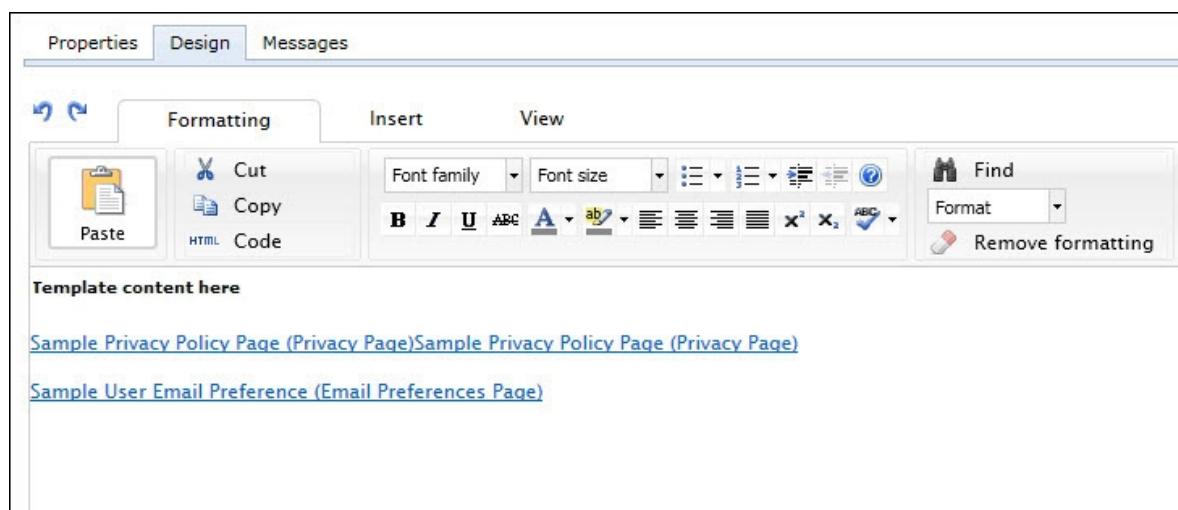
+ Add users and roles

11. To add users or roles, click **Add users and roles**.
12. To assign rights, select **View**, **Edit**, **Delete**, or **Change Security**.

Note: Edit rights allow users to edit the template and its defaults. To use the template to create email messages, users only need View rights. If users edit a template, the changes do not affect email messages previously created based on the template.

For more information about security and user roles, see the *Users & Security Guide*.

13. Click **Save**. The template opens to the Design tab.



Note: To see the scroll bar on an email template, you must use a screen resolution of greater than 800 x 600.

14. Enter the default content for all email messages created from this template.

To have personalized information from other Blackbaud programs appear in messages created from this template, add merge fields.

- a. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar. To expand the list, click the plus sign next to a field category.
- b. To add a merge field to the message, double-click or drag and drop a field in the content area.
- c. Put fields where you want them to appear in the body of the email. For example, enter "Hello, First Name." In the email, "Hello, [recipient's first name]" appears. To move a field, click and drag it to the new location.

For example, you can create an email template for messages sent to existing program users who attempt to register again. In the bottom pane, you can enter the content required to remind the user he is already a registered user and to provide the existing username and password information.

15. To add conditional content to the message to customize it for different types of recipients, click **Conditional content** on the Insert tab in the toolbar. For more information about conditional content, see [Add Conditional Content on page 22](#).
16. Create links to the pages of your website that contain the User Email Preferences Form and your organization's privacy statement. You must include these links in each email you send.
17. To format the email template's appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.

18. Click **Save**.

Warning: If you select the Messages tab before you click **Save**, you lose the information you entered on the Design tab.

19. To send a message based on the new template, select the Messages tab and click **New message**. The New Message screen appears. For more information about how to send a message, see [Design and send an email message on page 31](#).

20. To save the email template, click **Save**.

21. To return to *Templates*, click **Return**.

Template Data Sources

You can select a data source for each template you create. The data source determines which type of list can be used for messages created from the template and which merge fields are available when you write email content. When you set a data source on a template, messages created from the template can be sent to only lists that use the same type of data source.

There are several types of data sources available to serve different purposes:

Constituents: Use the Constituents data source to send emails to lists based on queries of constituents from Blackbaud NetCommunity. The Constituents data source provides the largest variety of merge fields for personalized messages. This is the option you will use most often.

Registered Users: Select the Blackbaud NetCommunity data source for emails sent to users who have forgotten their login credentials and are attempting to register again or for emails sent automatically to imported users with their usernames and passwords.

Imported lists: If you import email lists from CSV files, those lists appear as data sources in this field. Select an imported list when you want to use a particular list for all messages created from a template.

Chapter: Select the Chapter data source for messages sent to members of a chapter.

None: When you select None for the data source, you can send the message to any type of list, but the message will not include any merge field options for you to personalize messages.

Note: For more information about data sources for email lists, see [Lists on page 65](#).

➤ View the tabs of an email template

After you create an email template, you can view its properties, design, and any messages created based on it. If you have applicable security rights, you can also edit the properties and design of the template. Changes made to the template do not affect individual email messages already created based on the template.

1. From *Email*, click **Templates**. *Templates* appears.

2. To search for a template, enter its name or subject, or select its data source in the filter fields and click **Filter**. The templates that match your criteria appear.

Note: The grid can display up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results, or select the page number to view.

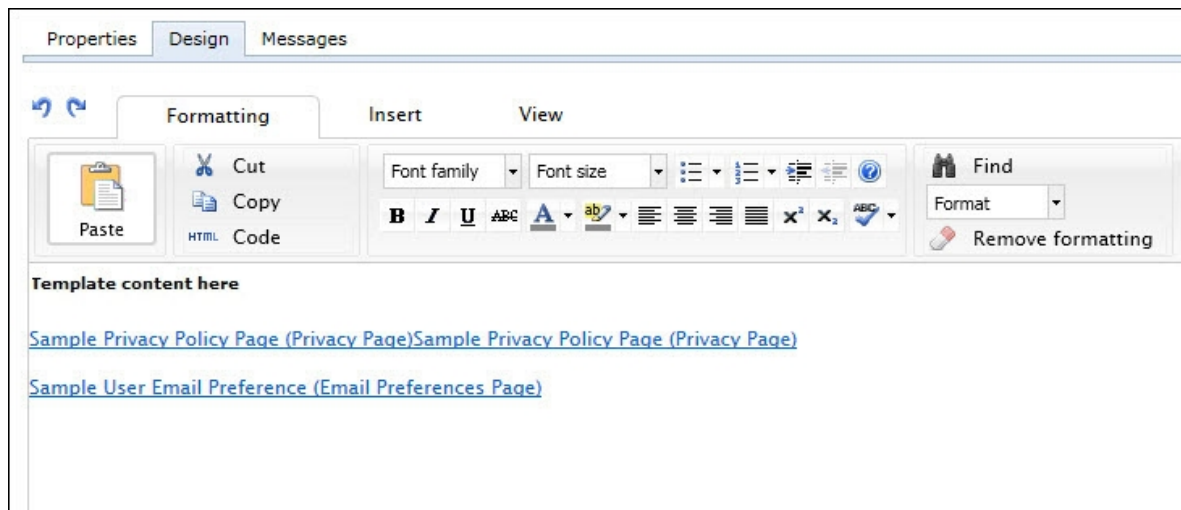
- Next to the template to view, click **Click here to edit this email template**. The email template Properties screen appears.

The screenshot shows the 'Properties' tab of an email template configuration interface. The 'Properties' sub-tab is active, displaying fields for 'Template Name', 'Description', 'Data Source', 'Subject', 'From Name', 'From Address', and 'Reply Address'. The 'Failure to send notification' checkbox is checked, and the text box next to it contains the instruction 'Send notification of failed to send emails to a specific email address.'

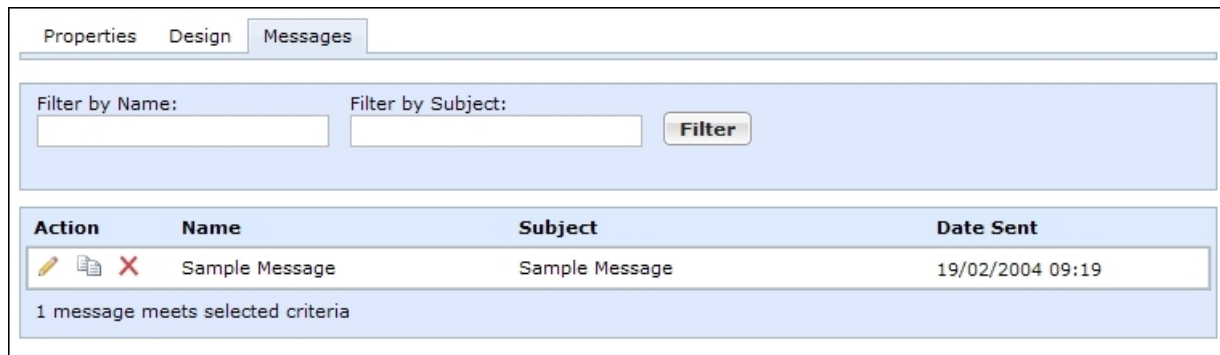
- On the Properties tab, view the properties and security settings entered when the template was created. To help you navigate through the information, the Properties tab contains the Properties and Targeting & Security tabs.
 - On the Properties tab, view the name, description, data source, and default mailing options entered when the template was created. If the template message contains merge fields, you cannot change the selected data source.

When you host multiple sites, the **Assign to site** field appears on the Properties tab so you can move a template from its current site to another site. If the template is in use on the source site, it continues to be on that site. However, the template is now associated with the target site and its security.

- On the Targeting & Security tab, view the security rights assigned to user roles for the email template.
- To view the default content for all email messages based on the template, select the Design tab.



6. To view the messages created based on the template, select the Messages tab.



7. To return to *Templates*, click **Return**.

➤ View a message created from an email template

1. From *Email*, click **Messages**. *Messages* appears.
2. In the **Filter by Template** field select a template.
3. Click **Filter**. Messages that use the template appear.
 - To view a sent message, select it and click **Click here to view report**. The Message Report screen appears. For information about the tabs on this screen, see [View the tabs of a sent message on page 1](#).
 - To view a message the program has not yet sent, select it and click **Click here to edit this email message**. The Email Editor page appears. For information about how to edit the message, see [Design and send an email message on page 31](#).

Note: The grid can display up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results, or select the page number to view.

4. To return to *Messages*, click **Return**.

➤ Copy an email template

Save yourself time and effort. When you need to create a new email template and a similar one exists, copy and tweak the existing template to create the new one rather than start with a blank template.

1. From *Email*, click **Templates**. *Templates* appears.
2. To search for a template, enter its name or subject, or select its data source in the filter fields and click **Filter**. The templates that match your criteria appear.

Note: The grid displays up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results.

3. Select a template and click **Click here to copy this email template**. The New template page appears with settings from the existing template.

Note: To improve your email marketing for mobile users, six mobile friendly email templates are available for you to copy and use as new templates. You can easily identify these in the email templates grid by viewing templates with "Placeholder" in the **Description** column. When you create a copy of one, make sure you update the placeholder text in the new template with your unique content. For example, you can replace the merge field placeholder text with merge fields in the HTML editor. You can also replace the sample logo banner with your organization's logo banner. To secure the content in these templates, you cannot edit or delete them.

4. On the Properties tab, enter a new name in the **Template Name** field.
5. Edit the template settings as necessary. For information about how to design an email template, see [Design and send an email message on page 31](#).
6. Click **Save**. The template opens to the Design tab with a layout based on the original template.
7. Edit the layout as necessary. For information about how to design an email template, see [Design and send an email message on page 31](#).
8. Click **Save**.
9. To return to *Templates*, click **Return**.

Add Conditional Content

Add conditional content to an email message to customize the message for different types of recipients. For example, you may send a message to alumni and the parents of current students where most content is the same but you need to customize some sections for the two groups of recipients. With conditional content blocks, you can create a single message that generates the two versions of the content. A conditional content block works as a container that holds different pieces of content and determines where the content appears in the message. Within the content block, you add "conditions," which are chunks of content associated with a query or email list of recipients.

The example below demonstrates how this works. This message includes a conditional content block containing two conditions — a paragraph specifically for parents and another for alumni. When you

send the message, recipients in the query or list of parents view the Parents paragraph and recipients in the query or list of alumni view the Alumni paragraph.

Dear ,

This is an exciting and historic year to be associated with Baxter College. As we celebrate our 100th anniversary, the campus has undergone some major physical improvements, and we are in the final months of the Centennial campaign for endowment and scholarship. As part of these improvements, we have constructed a new residence hall, renovated the library, and added a new wing to the Social Sciences building.

It was important to make these physical improvements during this pivotal time in the college's history because Baxter needs to look ahead and prepare to meet challenges as it begins its second century. To support ongoing improvements, our challenge is to ensure a healthy endowment and strong scholarship program. Our Centennial campaign has a goal of \$50 million in gifts and pledges by May 31, 2019. **This goal is within reach but we need your help!**

Parent support is a critical part of the Centennial campaign and there is a wonderful tradition of parent support at Baxter. Gifts from current parents will ensure that current students will have all the advantages they need in order to become the leaders of tomorrow. In fact, last year 50% of parents of alumni remained involved with Baxter with an annual gift. This is a fantastic participation rate and I hope that we will be able to increase it further with your help.

As a former student at Baxter, you understand how important it is ensure that current and future students will have all the advantages they need in order to become the leaders of tomorrow. Every year our alumni help us raise money to meet the needs our college is facing. These needs include resources for upgrading technology, funds to attract the best faculty, and to help deserving students come to Baxter. Please join other alumni and friends who have decided to support Baxter's students and programs with a gift to the Centennial campaign.

So in honor of this unique and historic time in the college's history please consider making a gift to the Baxter College Fund today. Thank you!

Sincerely,

Alumni Chair
The Baxter College Fund

Conditional
Content

Conditional content workflow

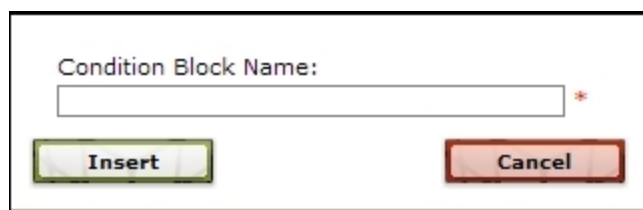
- **Determine your targets** — Create lists or queries that include the recipients to customize content for.
- **Add a condition block** — In the area where you want the content to appear, click **Conditional content** on the Insert tab in the toolbar.
- **Add condition** — Add the default condition. To add other conditions, define the content and select the group of recipients who can view it.

Note: The order of conditions is important because recipients may fall into more than one query or list. In that case, the recipient receives the most top-level condition. For example, you have a condition for each of these groups — Alumni, Parents, and Current Students. Because a parent could also be an alumnus, you need to order the conditions so the Parents condition appears at the highest level. This ensures that parents who are alumni receive the message intended for parents.

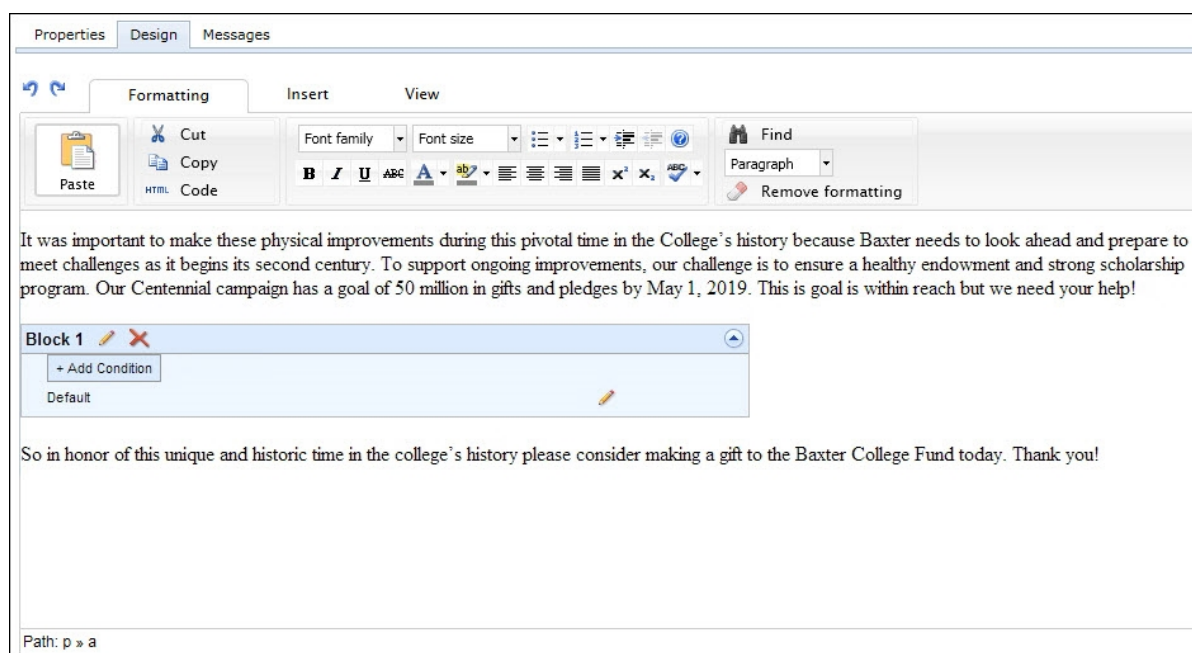
- **Verify content** — Use **Conditional content preview** on the View tab in the toolbar to verify that content appears as expected for each group of recipients.
- **Report on message results** — After the message is sent, view the Message Report to evaluate how each condition performed.

➤ Add conditional content

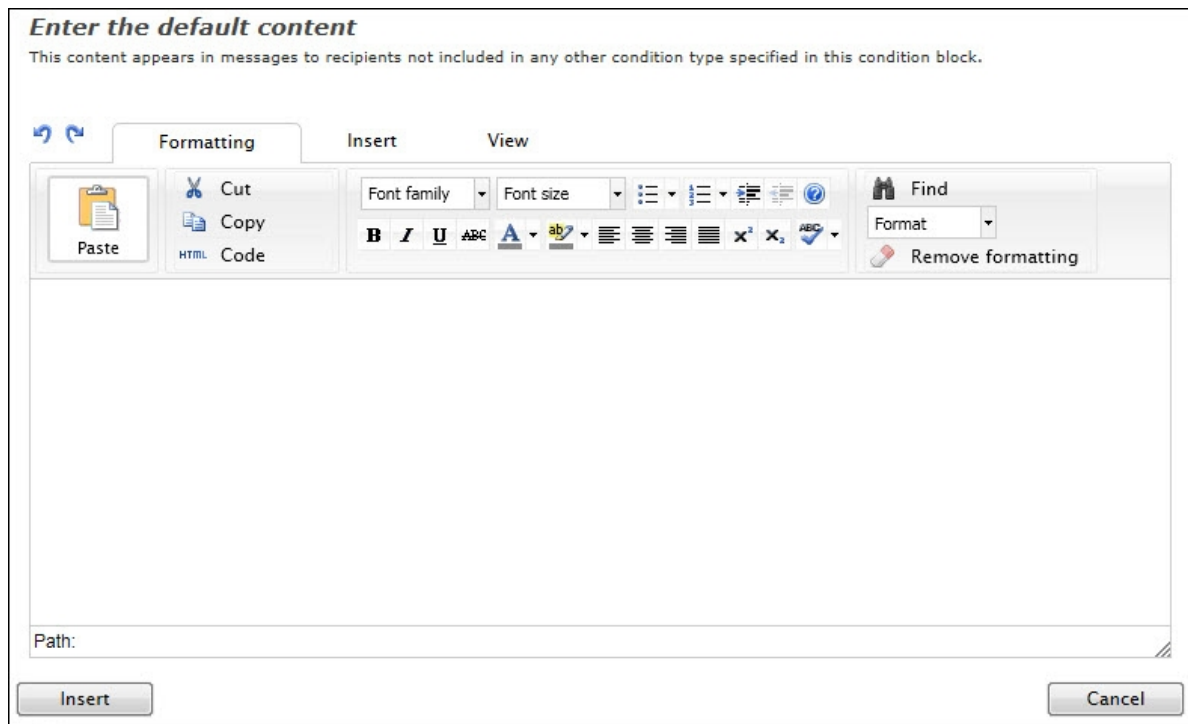
1. From an open message, click **Conditional content** on the Insert tab in the toolbar. The Conditional Content screen appears.

A dialog box titled "Conditional Content" with a text input field labeled "Condition Block Name:". Below the input field are two buttons: "Insert" and "Cancel".

2. Enter a name for the conditional content block and click **OK**. You return to the message and the new conditional content block appears in the message.

The screenshot shows an email editor interface with tabs for Properties, Design, and Messages. The Design tab is active, showing a toolbar with various formatting and insertion options. Below the toolbar, a paragraph of text is displayed. A new conditional content block, labeled "Block 1", has been added. It contains a button labeled "+ Add Condition" and a "Default" section. The text "So in honor of this unique and historic time in the college's history please consider making a gift to the Baxter College Fund today. Thank you!" is visible below the conditional content block. The path "Path: p » a" is shown at the bottom.

3. The conditional content block includes a default condition automatically. The default content appears for any recipients not included in a condition specified for the block. You can leave the default condition blank or click **Edit** to access the Enter the default content screen.



4. Use the HTML editor to add text, merge fields, and images for the default content.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.

5. Click **OK** and you return to the message. If you added content to the default, it is now labeled with a brief preview of the text included in the condition.
6. To add the first condition, click **Add condition**. The Conditional Content screen appears.

Choose the condition type
Select the query or list that will view this block of content.

☒ Query
☐ List

Only recipients that exist in both the data source and the query will view the content.

Query:

Enter the content
This content appears in messages to recipients included in the condition type selected above.

Formatting Insert View

Paste Cut Copy HTML Code

Font family Font size **B** *I* U ABC A ab **x²** **x₂** **ABC**

Find Format Remove formatting

Path:

Insert Cancel

7. To define the condition based on a query, select **Query** and click **Change**. The Query Search screen appears so you can select a query. To define the condition based on an email list, select **List** and click **Change**. The Select Lists screen appears so you can select a list.
8. Enter the content for this condition.

Choose the condition type
Select the query or list that will view this block of content.

☒ Query
☐ List

Only recipients that exist in both the data source and the query will view the content.

Query:

Enter the content
This content appears in messages to recipients included in the condition type selected above.

Formatting Insert View

Paste Cut Copy HTML Code Font family Font size Find Format Remove formatting

Parental support is a critical part of the Centennial campaign, and we have a wonderful tradition of parental support at Baxter. Gifts from current parents will ensure that current students will have all the advantages they need to become the tomorrow's leaders. In fact, last year 50 percent of Baxter alumni contributed with an annual gift. This is a fantastic participation rate, and I hope that we can increase it with your help!

Path:

Insert Cancel

- Click **OK**. You return to the message and the new condition appears in the conditional content box. The condition is labeled with the selected query or list and contains a brief preview of the text entered.

Formatting Insert View

Paste Cut Copy HTML Code Font family Font size Find Paragraph Remove formatting

It was important to make these physical improvements during this pivotal time in the College's history because Baxter needs to look ahead and prepare to meet challenges as it begins its second century. To support ongoing improvements, our challenge is to ensure a healthy endowment and strong scholarship program. Our Centennial campaign has a goal of 50 million in gifts and pledges by May 1, 2019. This is goal is within reach but we need your help!

Block 1

| | |
|-----------------|--|
| B1 | "Parent support is a critical part of the Centennia" |
| + Add Condition | |
| Default | |

So in honor of this unique and historic time in the college's history please consider making a gift to the Baxter College Fund today. Thank you!

Path: p » a

10. Continue to add conditions to the block as needed.
11. To edit a condition, click **Edit**.
12. To move a condition, click the up or down arrow.
13. To delete a condition, click **Remove**.
14. To preview each version of the message, click **Conditional content preview** on the View tab in the toolbar. The View Message screen appears. For more information about how to preview content, see [Preview Conditional Content on page 28](#). Click **Close** to return to the message.
15. Click **Save**. If you have created a message or newsletter, you can send the message to recipients.

After you send the message, the Conditional Content tab in the Message Report displays statistics about how each condition in the message performed. The report includes the number of recipients that received the condition, the number who opened the email, the number of click-throughs, the number of conversions (transactions), and the total gift amounts.

Note: Test messages do not display merge field data or conditional content as they will appear in the final message. Instead, the test message includes placeholders where these items will appear in the final message. To test merge fields and conditional content, select the test list in the **To** field and then select **Send final**.

Preview Conditional Content

After you create a message that contains conditional content, you can preview each version of the message to verify that content appears as expected for each group of recipients. You can also view the approximate number of recipients who will receive each condition.

Note: You must add conditional content and select a target list before you can preview conditions or generate statistics.

➤ Preview conditional content

1. From a message containing conditional content, click **Conditional content preview** on the View tab in the toolbar. The View Message screen appears.
2. Select the conditions in each block to view and click **Preview**. The message appears on the right.

View Message

To preview the message, select the condition you would like to see in each block and then click Preview.

To view the number of recipients who will receive each condition, click Generate Statistics. If you have a large number of recipients, generating statistics may take several minutes. While you wait, you can exit Blackbaud NetCommunity and the generated statistics will appear automatically the next time you preview the conditional content.

Recipients (Optional)

Message

Block 1

☐ Parents
 ☒ Students
 ☐ Default

Preview

Generate Statistics

This is an exciting and historic year to be associated with Baxter College. As we celebrate our 100th anniversary, the campus has undergone some major physical improvements, and we are in the final months of the Centennial campaign for endowment and scholarship. As part of these improvements, we have constructed a new residence hall, renovated the library, and added a new wing to the Social Sciences building.

It was important to make these physical improvements during this pivotal time in the College's history because Baxter needs to look ahead and prepare to meet challenges as it begins its second century. To support ongoing improvements, our challenge is to ensure a healthy endowment and strong scholarship program. Our Centennial campaign has a goal of \$50 million in gifts and pledges by May 31, 2019. This is goal is within reach but we need your help! So in honor of this unique and historic time in the college's history please consider making a gift to the Baxter College Fund today. Thank you!

As a former student at Baxter, you understand how important it is ensure that current and future students will have all the advantages they need in order to become the leaders of tomorrow. Every year our alumni help us raise money to meet the needs our college is facing. These needs include resources for upgrading technology, funds to attract the best faculty, and to help deserving students come to Baxter. Please join other alumni and friends who have

- To view the number of recipients who will receive each condition, click **Generate statistics**. The **Recipients** column displays the approximate number of recipients for each condition.

| Recipients (Approx.) | |
|---|-------------|
| Message | 7500 |
| Block 1 | |
| <input type="radio"/> Parents | 2500 |
| <input checked="" type="radio"/> Students | 4000 |
| <input type="radio"/> Default | 1000 |
| <div>Preview</div> <div>Generate Statistics</div> | |

Note: **Generate statistics** does not appear on the View Message screen for email templates or email messages without a selected target list.

4. Click **Close** to close the View Message screen and return to the message.

Messages

In *Messages*, you can add, delete, and view email messages. To ensure consistency and save time, you can create an email message from an existing email template. You create email templates in *Templates*. We recommend only users with Administrator rights create and edit email templates.

You can also use an existing email message to create one. To do this, open and copy the existing email. You can change the copy as required, save it as a new email, and send the message.

Note: On the Messages screen, if **Click here to edit this email message** appears in the **Action** column, the program has not sent the email. Before you send an email, you can edit it in *Messages*. To make changes, click **Click here to edit this email message**.

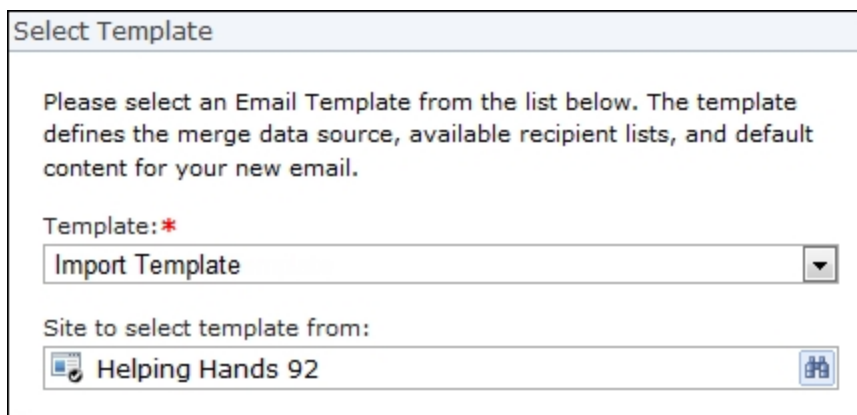
With *Blackbaud NetAdvocacy*, you can download advocacy action data to your offline database. This data includes alerts, email information, and attributes. *Blackbaud NetAdvocacy* is used with *Capwiz* subscription service to include pages on your website where users can send email to influential individuals, such as Congressional, state, and local officials, to encourage their influence on a specific

cause such as grant funding for a nonprofit. You can use *Messages* to include links in your alert email from the program's advocacy functionality. In addition, when you send an advocacy alert email, the advocate's actions automatically link to their offline record after the action is complete. For information about how to use *Blackbaud NetAdvocacy* and *Capwiz* to set up action alerts on your site, see your *Capwiz* Site Control page.

➤ Design and send an email message

When you create and design an email in *Messages*, it is sent only once. You can edit the email before you send it, but not after.

1. From *Email*, click **Messages**. *Messages* appears.
2. Click **New message**. The Select Template screen appears.



3. In the **Template** field, select a template. To decide on a template, consider the type of email you will write. For information about email templates, see [Templates on page 14](#)
4. In the **Site to select template from** field, select a site to narrow the list of templates you can use for the message. You can select a template from another site even though the message is for the site you are currently on. If you do not host multiple websites, your single site defaults in the field.
5. Click **OK**. The New message page appears.

Note: To see the scroll bar on an email message, use a screen resolution greater than 800 x 600.

Save Send test Send final Return Help

Recipient lists: ?

Test lists: ?

Test emails: ?

Name of email: * Issue date: 6/8/2012 10:40:31 AM

Subject: * Send after date: 6/8/2012 10:40:31 AM

From address: * From name: * [More options...](#)

Formatting Insert View

Paste Cut Copy HTML Code Font family Font size Find Format Remove formatting

[Sample Privacy Policy Page \(Privacy Page\)](#)

[Sample User Email Preference \(Email Preferences Page\)](#)

Welcome applicants. This is an email just for you!

First name

Administrator

6. In the **Recipient lists** field, select the lists of recipients to include on the message.
 - a. If the message uses a template with a data source other than "Appeal," click the binoculars. The Select Target Lists screen appears. The grid displays the saved email lists that you have security rights for and that match the data source type selected on the template.

Tip: For more information about data sources, see [Template Data Sources on page 19](#).

Select Target Lists

Filter by site: Blank Client Site Filter by name:

Filter by data source: Constituents

| List name | Date loaded | Record count | Data source |
|------------------------|------------------|--------------|--------------|
| Sample Newsletter List | 2/8/2011 9:29 AM | 0 | Constituents |

1 list meets selected criteria

Selected Lists

You create and store email lists in *Lists*. Lists include individuals from offline constituent queries and imported lists. When the message uses a list with “Constituents” as the data source, individuals must have an email address that matches the type selected in the **Email address type** field on the template or message, an email address marked as primary in The Raiser’s Edge, or an email address with the same phone type that is mapped to **Email** under **Phone type mapping** on the Settings tab in *Sites & settings*. If the constituent’s record does not have an email address that matches any of these types, the individual does not receive the message. When an individual’s record is marked **Requests no email**, the individual is excluded from the list and does not receive the email message. For more information about *Lists*, see [Lists on page 65](#).

- b. Enter criteria to narrow the list and click **Filter**. The grid displays the lists that meet the criteria.

Note: When the template’s data source is “Chapter,” you can filter chapters by the Chapter Manager part name. In the **Filter by Name** field, enter the name of the Chapter Manager part. The grid displays the available chapters in a “Chapter Manager part name — Chapter name List” format. For example, “Alumni Chapter Manager — San Diego List” contains the members of the “San Diego” chapter created by the Chapter Manager part named “Alumni Chapter Manager.” To send the message to the members of a chapter, add it to the **Selected Lists** box.

- c. To add a list, select it and click **Add**. The list appears in the **Selected Lists** box. You can include multiple email lists.

Depending on your website environment and configuration, sending to a large list of recipients may cause performance issues. If you experience this, we recommend you

include smaller queries or fewer queries in the list. For more information, see [Create an email list on page 65](#).

- d. To remove a list from the **Selected Lists** box, select it and click **Remove**.
 - e. Click **OK**. You return to the New message page.
7. To send the message to a test group, such as people in your organization that need to approve the message, in the **Test lists** and **Test emails** fields, specify recipients for a test version of the message.
 - In the **Test lists** field, click the binoculars to select the lists of recipients for the test version. The Select Test Lists screen that appears has the same options as the Select Target Lists screen.
 - In the **Test emails** field, enter email addresses if you do not use email lists or if you want to include recipients who are not in your lists.

Note: We recommend that you send the email message to test recipients before the final recipients. The test recipients can review the message and verify its design in multiple email client readers. You can create lists of test recipients in *Lists*. For information about lists, see [Test Lists on page 72](#).

8. In the email identifier fields, enter a name for the email message, a subject to include in its **Subject** field, and an email address and name to include in the **From** field.

Note: If the template includes a subject, it automatically appears in the **Subject** field. You can edit the subject as necessary.

9. In the **Send after date** field, enter when to send the email message. By default, the current date and time appear. However, you can schedule the email for a future date or time. For example, you may be out of the office for the next month but need to send your regular weekly email during that time. Or you may design an event marketing campaign and schedule email messages to send as reminders one week, three days, and the day before the event.
 - To send the email at a future date or time, enter the date and time. The website does not process the email until the date and time you enter when you click **Send final**.
If you delete the email before the date you enter in the **Send after date** field, the program does not process the email and it is not sent to recipients.
 - To immediately send the email when you click **Send final**, leave the current date and time.

Note: Use the **Send after date** field to schedule one-time, pre-planned messages. However, if you have the Scheduled emails feature on the Email page, we recommend using that method instead because it provides more flexibility. For more information, see [Scheduled Emails on page 86](#).

10. The **Email address type** field defaults to the type selected for the template the message uses. When this field is blank or if you want to change the type, select it from the list.
11. To receive responses from recipients at a different email address than the one you use to send the message, click **More Options** and enter the address in the **Reply Address** field.
12. Under **Notifications are to be sent to the following addresses**, select **Failures** to receive failure messages when email messages are not delivered. In the field beside the checkbox, enter

an email address to receive failure messages.

Note: Failures are email addresses that do not receive messages. Failure can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN). For information about how the program handles failures, see [Bounced Email Management on page 42](#).

13. The bottom pane displays the email's default content. To format the message's appearance and layout, use the HTML editor.

For information about the HTML editor, refer to the *Program Basics Guide*.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.

When you design an email message, you must include hyperlinks to the Privacy Page specified on the Settings tab in *Sites & settings* and a User Email Preferences Form on your website. For more information, see the *Administration Guide*.

To personalize the message with information about the constituent, add merge fields.

- a. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar.
- b. To add a merge field to the message, double-click or drag and drop the field in the content area.
- c. In the body of the email, put fields where you want them to appear. For example, enter "Hello, First Name." In the email, the recipient reads "Hello, [the recipient's first name]." To move a field, click and drag it to the new location.

Note: When you add a link in your message to a Blackbaud NetCommunity web page, the URL contains valuable information to track data and to automatically populate biographical information on your web page. Use this example to identify each piece of data the URL includes: `http://www.yourdomain.org/DonationForm&srcid=[source ID]&srctid=[source type ID]&erid=[email recipient ID]&trid=[tracking ID]`.

- d. To add conditional content to the message to customize it for different types of recipients, click **Conditional content** on the Insert tab in the toolbar. For more information about conditional content, see [Add Conditional Content on page 22](#).

14. Click **Save**.

➤ Send the message

- To send the message to the test recipients, click **Send test**. The message may take a few minutes to send if you use a large list. When the program sends the email message, you return to *Messages*.

When you receive the test email, verify the message and its components look and work correctly before you send the final email.

Note: Test messages do not display merge field data. Instead, the program includes placeholders where the merge data will appear in the final message. Also, the program disregards the value in the **Send after date** field when you click **Send test** and immediately sends the test message.

- To send the message to its final recipients now or at the scheduled date and time, click **Send final**. The Send Status tab appears for you to view the target lists, the number of recipients in each list, and when the lists were last refreshed.

To make sure the latest recipients are in the queries that the lists use, click **Refresh Lists**. An informational message then appears for your review before clicking **Start Refresh** to begin the process. After it completes, click **Yes** on the tab to actually send the final email to recipients.

Note: You are not required to refresh the lists before sending the message.

When you send the final email, one more refresh occurs automatically for lists that use dynamic queries. This may cause the recipient numbers on the Sent Status tab to differ from the final sent numbers that appear in email reports. If your lists use static queries, this does not apply. For more information about email statuses, refer [Email Delivery Status on page 43](#).

- To send the message to the test or final recipients at a later time, click **Return**. You return to *Messages*. The new email appears at the top of the list. To send the email, click **Click here to edit this email message**. When the email message opens, click **Send test** or **Send final**.

Note: Each email is sent with a text version in addition to its HTML-formatted version. Email client readers that display text only either display this text version or generate a text version from the HTML. You cannot alter the text version of the email.

➤ Copy an email message

Each sent email contains a text version in addition to its HTML-formatted version. Email client readers set to display text only show either this text version of the email or its own text version, generated from the HTML. You cannot alter the text version of the email.

1. From *Email*, click **Messages**. *Messages* appears.
2. Enter criteria to narrow the messages in the grid and click **Filter**. The messages that match your criteria appear.

Note: The grid displays up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results.

3. Select a message and click **Click here to copy this email message**. The New message page appears.

Note: To copy a message, you can also open it and click **Copy message**.

4. In the **Name** field, enter a new name.
5. Edit the message as necessary. For information about how to design an email message, see [Design and send an email message on page 31](#).
6. From *Email*, click **Messages**. *Messages* appears.

- If the message includes an email list of test recipients, send the message to the test recipients. Click **Send Test**. Depending on the size of the selected test list, the message may take a few minutes to send. When the program sends the email message, you return to *Messages*.

After the test recipients verify the email message and its components look and work correctly, send the email to its final recipients. From *Messages*, click **Click here to edit this email message**. When the email message opens, click **Send Final**.


- To send the message to its final target recipients now, click **Send Final**. Depending on the size of the selected email list, the message may take a few minutes to send. When the program sends the email message, you return to *Messages*.
- To send the message to the test or final recipients at a later time, click **Return**. You return to *Messages*. The new email appears at the top of the list. To send the email, click **Click here to edit this email message**. When the email message opens, click **Send Test** or **Send Final**.


View sent email statistics

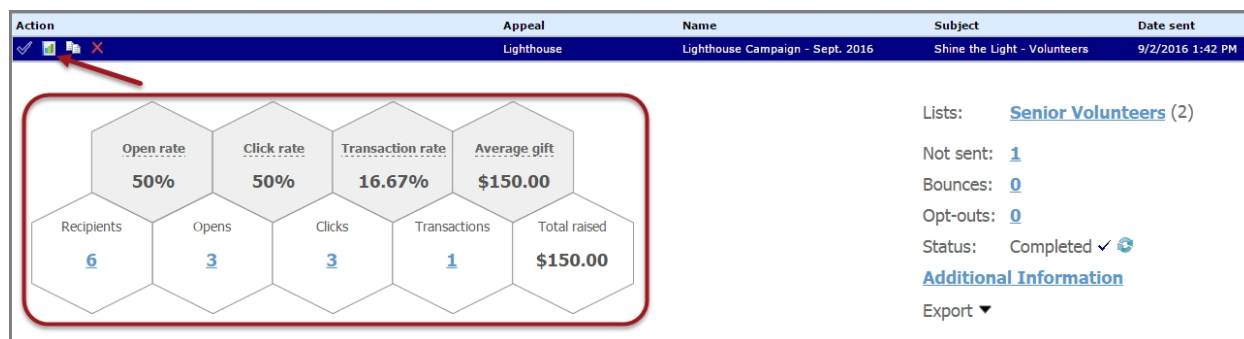
Show Me: Watch [how to view and learn about email statistics](#).


When you analyze the statistics for an email message, you evaluate how effective the email is and you can also use the information to help determine areas of improvement for your future email messages. After you send a message, you can view its status log and performance statistics from the Messages page.

➤ View the performance statistics for an email message

1. From *Email*, click **Messages**. *Messages* appears.
2. Select a message and click **Click here to view report** () in the **Action** column. The performance statistics grid displays below the message row.

Tip: If the  button doesn't display, the email has not yet been sent and therefore there are no statistics to view.



Note: To ensure the latest statistics display in the grid after the job is completed, click **Refresh report** () next to the **Completed** job status.

3. In the top row of the grid, view the following email activity percentages and average gift amount:

Tip: Hover over each statistic title to view a description of how the value was calculated.

- **Open rate:** Displays the percentage of delivered emails opened by recipients. Messages are considered open when the recipient allows an image to display or clicks a link.
- **Click rate:** Displays both the click-through rate (CTR) and the click-to-open rate (CTOR). The CTR is the percentage of unique recipients who clicked links in the email over the number of delivered messages. The CTOR is the percentage of unique recipients who clicked links in the email over the number of opened messages.

To track click-throughs, the program associates email IDs with email messages. When you include a link in an email message, the program appends a destination link value that includes the email ID to the site URL that you specify in *Sites & settings*. When an email recipient clicks the link, the program redirects the user to the page through the site and then associates any resulting activity with the email ID.

If a user clicks multiple links in the email, both percentages only count one click per user.

- **Transaction rate:** Displays both the transaction rate and the transactions to click rate. The transaction rate is the percentage of unique recipients who completed transactions from the email over the number of delivered messages. The transactions to click rate is the percentage of unique recipients who completed transactions from the email over the number of opened messages.
 - **Average gift:** Displays the average gift amount that users gave in response to the email for donation, event registration, and membership transactions.
4. In the bottom row of the grid, view the following email activity statistics and the total amount raised:
 - **Recipients:** Displays how many people received the message. Click the amount to display the list of recipients, including email addresses, names, and actions.
 - **Opens:** Displays how emails were opened. Click the amount to display the list of recipients who opened the email. The message is considered open when the recipient allows an image to display or clicks a link.
 - **Clicks:** Displays how many recipients clicked links in the message. Click the amount to display a list of recipients and which links they clicked.
 - **Transactions:** Displays how many transactions (including donations, event registrations, and membership transactions) your organization received as a result of the message. Click the amount to display a list of recipients whose transactions were received.

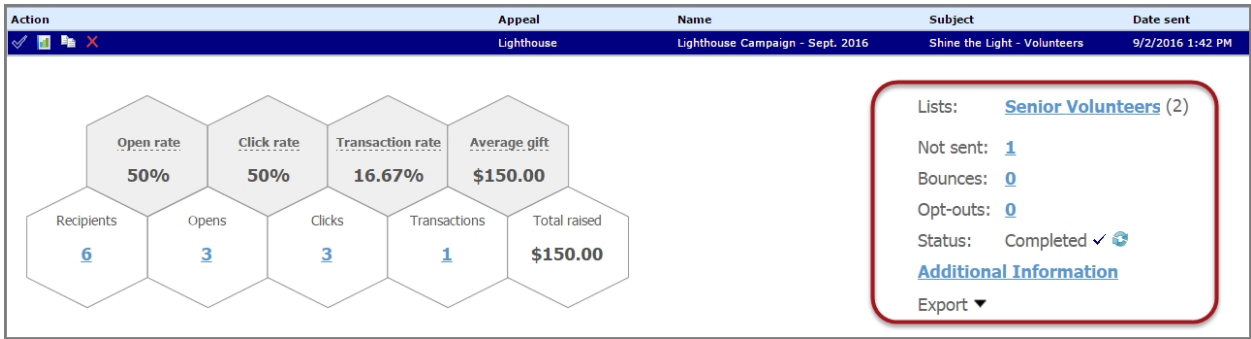
Note: For the statistics above, when displaying the list of recipients, you can search the list by entering an email address, first name or last name in the **Search** field. You can click each email address to view performance statistics specific to that individual, including how many emails he received, his open rate, click rate, and conversion rate, and the total gift amount of his email transactions.

Note: When an email recipient forwards your message to other recipients, their statistics are also captured in the grid for all percentages and counts. For example, Mark Adamson receives your latest Annual Fund email and forwards it to Jane Smith. Jane opens the email and clicks the Annual Fund link to submit a donation on your website. The grid updates to include Jane's data in all

applicable statistics and her email address also appears in lists related to the counts in the bottom row.

- **Total raised:** Displays the total amount of money raised as a result of the message. This total includes donation, event registration, and membership transactions.

5. Next to the grid, you can view the following additional statistics:



- a. Click the link beside **Lists** to display the distribution list names and view the number of recipients for each list. You can then click on each list name to view details about the messages that were not sent.

| List Name | Recipients Count | | |
|--|------------------|---------------|------------|
| New Volunteers | 5 | | |
| Breakdown of Messages not sent | | | |
| | Count | % of Not sent | % of Total |
| Opt-outs: | 0 | 0% | 0% |
| No address: | 0 | 0% | 0% |
| Invalid account: | 1 | 100% | 20% |
| Bounce: | 0 | 0% | 0% |
| Total not sent: | 1 | | |
| Email processed on 9/2/2016 1:50:02 PM | | | |
| Senior Volunteers | 2 | | |

- b. Beside **Not Sent**, **Bounces** and **Opt-outs**, click the amount to display more information associated with the statistic, such as email addresses, recipient names, and types.


Not Sent: Displays the number of emails that were not sent due to missing addresses or invalid accounts.

Bounces: Displays the number of bounced emails. For more information, see [Bounced Email Management on page 42](#).

Opt-outs: Displays the number of recipients who opted out of receiving email from your organization.


When someone informs you they did not receive a message, refer to these statistics first to determine why. Click the corresponding value for **Not Sent**, **Bounces** and **Opt-outs**, then review the email addresses and types to see if this clarifies why the email was not received. It may be possible that the email was overlooked in the recipient's inbox.

To search the data, enter your criteria in the **Email address**, **Name**, or **Type** fields, then click **Search**.

To save the displayed data as a *.csv file, click .

If the email is query-based, you can make sure the recipient appears in your query results. If you used an import list for the recipients, make sure the individual appears in the import file.


Note: If delivery fails because the recipient's Internet Service Provider (ISP) reports that the email address is invalid, the email address is automatically added to *Invalid accounts*. Typical causes of an invalid account occur when the email address contains a typographical error or the email account is canceled due to inactivity. Accounts that bounce email for another reason, such as a temporary network issue, a full mailbox, or a content filter, do not appear in *Invalid accounts*. For information about *Invalid accounts*, see [Invalid Accounts on page 72](#). For information about how the program handles accounts that bounce email but are still valid, see [Bounced Email Management on page 42](#).

6. Click **Additional Information**, then click the following tabs to view more statistics:
 - **Click Map:** Displays the links included in the email. Hover over a text or image link to view the corresponding email statistics.
 - **Click Report:** Displays a listing of total click-throughs by page, including the total number of views (the number of times the links were clicked) and the number of unique viewers (the number of recipients who clicked the links).
 - **Conversions:** Displays the number of online transactions, such as donations and event registrations, generated as a direct result of the email message. For each conversion type, the total amount of money raised, the payment method, and the number of transactions for each method are shown.
 - **Properties:** Displays the message content and properties.
7. You can export statistics to a *.csv file. To do this, under **Additional Information**, click **Export**. Next, select Summary or Details for the format. The summary version displays a brief summary of each statistic; the detailed version includes all recipients and actions.
8. To close the email statistics grid, click  in the **Action** column for the email message.


Warning: When you delete an email message, its performance statistics are also removed.

> View the status report for an email message

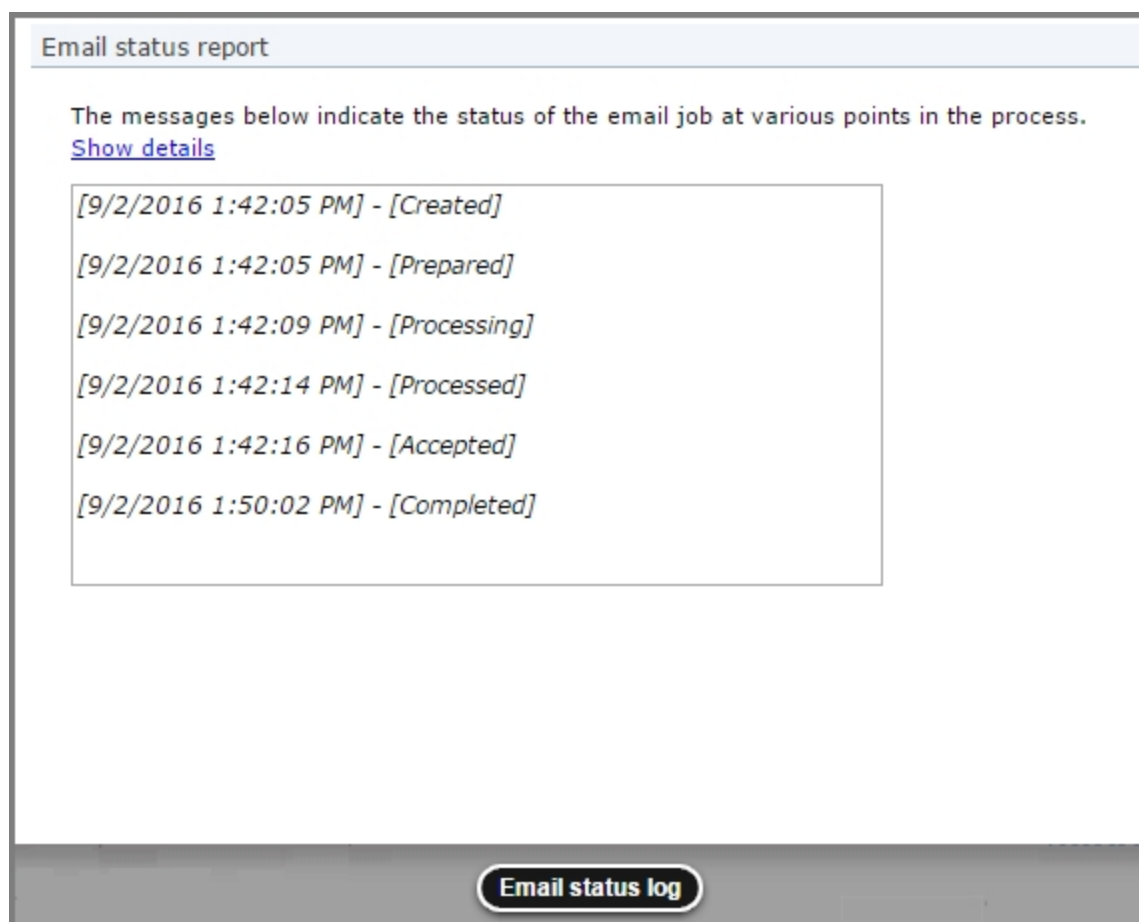
For additional information about the status of the email message, click **Email Status Log** in the **Action** column or to the right of the statistics grid next to **Status**. Depending on the status of the email job, the icon displays as one of the following:

 - Completed

 - In progress

 - Failed

Click the icon to display the email status report which shows the status and time of your email job at different points in the process. Click **Show details** to view specific information about the email status. After you check the status, close the report.



Bounced Email Management

A "bounced" email is one that is sent but cannot be delivered. The email Message Report includes details about two types of bounces: hard and soft. A hard bounce occurs when you send the message to an invalid account. A soft bounce occurs if the message reaches the recipient's mail server but cannot be delivered. This may happen, for example, if the recipient's mailbox is full or the size of the message is too large. You can view a breakdown of how many messages bounced and the type of bounce that occurred.

- To view a breakdown of how many copies of a sent message bounced, click the **Bounces** link on the email statistics grid on the Messages page. For more information, see [View sent email statistics on page 37](#).
- To view a breakdown of how many copies of a sent newsletter issue bounced, select the Issues Sent tab of the Issue Report tab on the Issue Report screen. For information about the Issues Report tab, see [View the tabs of a sent newsletter issue on page 50](#).
- To view a breakdown of how many copies of a sent acknowledgement bounced, select the Acknowledgements Sent tab of the Acknowledgements Report tab on the Acknowledgements Report screen. For information about the Acknowledgements Report tab, see [View the tabs of a sent acknowledgement email on page 56](#).

If a sent email bounces, you can view the bounce error. For a message or newsletter, you can view bounce information on the Recipients tab on the Message Report or Issue Report screen. For an acknowledgement, you can view bounce information on the Messages tab on the Acknowledgement Report screen. To view a bounce error of an email, click **Click here to view detailed bounce information** in the **Actions** column. The Bounce Information screen appears and displays the exact wording of the bounce error. For information about the Recipients tabs, see [View sent email statistics on page 37](#) or [View the tabs of a sent newsletter issue on page 50](#). For information about the Messages tab, see [View the tabs of a sent acknowledgement email on page 56](#).

How the program handles a bounced email depends on the type of delivery failure.

- If the bounce error is caused by a temporary failure such as a network error, full mailbox, or content filter, the program tries to send the email again periodically for up to 8 hours. For a message or newsletter, you can view the latest bounce information on the Recipients tab on the Message Report or Issue Report screen. For an acknowledgement, you can view the latest bounce information on the Messages tab on the Acknowledgement Report screen.

Note: If an Acknowledgement email bounces due to a temporary failure, you can click **Click here to resend** in the **Action** column to attempt to send the email again.

- If the bounce error is caused by a permanent failure, such as an unknown user or address, the account is marked invalid. You can also view bounce information about these accounts in *Invalid accounts*. For information about how to manage your invalid accounts, see [Invalid Accounts on page 72](#).

Note: To prevent your email address from being blacklisted, the program does not send email to an account that is marked invalid.

➤ Export bounced email details

You can export the information that appears on the Recipients tab grid as a *.csv file. The details for each message include the bounce error, if any, that appears when you click **Click here to view detailed bounce information** in the **Actions** column of the grid.

1. From the Message Report screen, select the Recipients tab.
2. Click the **Export to .CSV** button. You can open the file or save it to a new location.

Note: You can export only information that appears in the grid. If you filter the entries, you limit the information you can export to the *.csv file.

Email Delivery Status

When you send an email, the program prepares the email, retrieves any merge data from other Blackbaud programs, processes the email, and then uploads the email to the Blackbaud NetCommunity mail server to be sent to its recipients.

After you send an email, you can view the current status of the sent message or newsletter issue. To view the delivery status of an email, access its Message Report or Issue Report screen and select the Summary tab. In the **Delivery status** frame, the **Status** field displays the current status of the email. For

information about the Summary tab, see [View sent email statistics on page 37](#) or [View the tabs of a sent newsletter issue on page 50](#).

- “Created” – The email is created but is not yet prepared for processing.
- “Prepared” – The email is in the queue to be processed.
- “Processing” – The email is being processed. This includes retrieving merge data from another Blackbaud program.
- “Processed” – The program processed the email, and it is in the queue to upload to the mail server.
- “No Valid Recipients” – The email cannot be delivered to the selected email list. For example, the email list may not contain any recipients or its recipients may not have valid email addresses.
- “Uploading” – The website is uploading the email to the Blackbaud NetCommunity mail server.
- “Upload Failed” – The website could not upload the email to the mail server. When this happens, the website automatically tries to upload the email again.
- “Accepted” – The mail server received the email and put it in the queue to be processed.
- “Active” – The mail server is processing the email to prepare it for delivery.
- “Completed” – The mail server processed the email, and it was sent or is in the queue to be sent.

Note: When the **Status** field displays “Completed,” the mail server may be in the process of sending the email to its recipients. Some messages or newsletter issues in the email may not yet be sent.

- “Exception” – The email could not be uploaded to the Blackbaud NetCommunity mail server due to an error when the website processed the email.
- “Exception on Server” – The email could not be sent due to an error on the Blackbaud NetCommunity mail server.
- For Support assistance, visit Blackbaud's [website](#).

Newsletters

In *Newsletters*, you can create a newsletter template for each type of newsletter you send by email. For example, you can create a newsletter for your alumni and another for your foundation donors. Within each saved newsletter, you can generate the current issue of the newsletter to send from the Issues tab. After you send the issue via email, the program stores the newsletter on the Issues tab for reference.

Note: Newsletters are sent only to users who subscribe to the newsletter on the User Email Preferences Form. For more information about the User Email Preferences Form part type, see the *Parts Guide*.

To share with users what newsletters are available, we recommend you link the page users are directed to after they register to the Email Preferences page so they can subscribe to mailings as soon as they register. You can also include information about newsletters in email messages with a link to the Email Preferences page.

Warning: It is important your organization assigns full Administrator rights to only a select number of users for *Newsletters*. Any change can affect multiple web pages. We strongly encourage only users knowledgeable in all areas of website design and this program perform tasks in *Newsletters*.

➤ Design a newsletter

1. From *Email*, click **Newsletters**. *Newsletters* appears.
2. Click **New newsletter**. The New newsletter page appears.

The screenshot shows the 'New newsletter' form with the following fields and options:

- Properties** tab selected, with **Targeting & Security** as an alternative tab.
- Newsletter Name:** A required text field (marked with a red asterisk).
- Description:** A text area with up and down arrow controls on the right.
- Subject:** A required text field (marked with a red asterisk).
- Send to:** A disabled text field containing the text: "A subscription list will be created for this Newsletter automatically."
- From Address:** A required text field (marked with a red asterisk).
- From Name:** A required text field (marked with a red asterisk).
- Reply Address:** A text field.
- Failure to send notification:** A checkbox option. When selected, it triggers a text box that says: "Send an email notification to a specific email address for each email message that was not delivered to the recipient."

3. On the Properties tab, enter a name in the **Newsletter name** field.
4. In the **Description** field, enter additional information, such as notes about the template layout.

Note: The **Send to** field is disabled. The program automatically generates a mailing list that includes only users who subscribe to the newsletter on the User Email Preferences Form.

5. In the **Subject**, **From Name**, and **From Address** fields, enter a default subject for the **Subject** field of newsletters you create with this template, as well as an email address and name for the **From** field. When you create individual newsletters, you can overwrite the subject.
6. To receive responses at a different email address than the one you use to send the newsletter, enter a return address in the **Reply address** field.
7. To receive failure messages when email messages are not delivered, select **Failure to send notification**. In the **Notification email address** field, enter an email address to receive failure messages.

Note: Failures are email addresses that do not receive the newsletters. Failure can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN). For information about how the program handles failures, see [Bounced Email Management on page 42](#).

8. To assign the security rights for the newsletter, select the Targeting & Security tab. For each user role, you can manage rights to view, edit, delete, and change security.

| Action | User/Role Name | View | Edit | Delete | Change Security |
|--------|----------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| | Everyone | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

+ Add users and roles

9. To add users or roles, click **Add users and roles**.
10. To assign rights, select **View**, **Edit**, **Delete**, or **Change Security**.

Note: Edit rights allow users to edit the newsletter template and its defaults. To create newsletters from this template, users only need View rights.

For more information about security and user roles, see the *Users & Security Guide*.

11. Click **Save**. The newsletter template opens to the Design tab.

12. To format the appearance and enter the default content for the newsletter, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.

Warning: To communicate your website's privacy policy and to provide a global opt-out option from your email communications, you must include links to the privacy page specified in *Sites &*

settings and to a User Email Preferences Form part on a web page when you design a newsletter. This also applies to newsletters you design for the Anonymous Newsletter Subscription part so anonymous recipients can also review your privacy policy and have the option to opt out of the newsletter at another time.

13. To have personalized information from another program appear in the newsletter for each recipient, add merge fields. For example, when you select the **First name** field, recipients receive a newsletter addressed directly to them.
 - a. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar.
 - b. To add a field to the newsletter, double-click or drag and drop a field in the content area.
 - c. Put fields where you want them to appear in the body of the newsletter. For example, enter "Hello, First Name" after it. In the email, the recipient reads "Hello, [his or her first name]." To move a field, click and drag it to the new location.
14. To add conditional content to the newsletter to customize it for different types of recipients, click **Conditional content** on the Insert tab in the toolbar. For more information about conditional content, see [Add Conditional Content on page 22](#).
15. To format the newsletter's appearance and layout, use the HTML editor.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.

16. Click **Save**.
17. To send an issue of the newsletter, select the Issues tab. For information about how to send an issue from the Issues tab, see [Design and send an issue of a newsletter on page 47](#).
18. To return to *Newsletters*, click **Return**.

➤ Design and send an issue of a newsletter

1. From *Email*, click **Newsletters**. *Newsletters* appears.
2. To search for a newsletter, enter its name or subject in the filter fields and click **Filter**. The newsletters that match your criteria appear.

Note: The grid displays up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results.

3. Select a newsletter and click **Click here to edit this newsletter**. The Issues page appears.
4. On the Issues tab, click **New issue**. The New issue page appears.

5. In the **Name** and **Subject** fields, enter a name for the issue of the newsletter and a subject in the **Subject** field of the email message.
6. In the **Issue Date** field, enter when you created the issue. By default, the current date and time appear.
7. In the **Send After Date** field, enter when to send the issue. By default, the current date and time appear. However, you can schedule the newsletter for a future date or time. For example, you may be out of the office for the next month but need to send your regular weekly newsletter during that time.
 - To send the issue at a future date or time, enter the date and time. After you design the newsletter, click **Send final**. The website does not process the email until the date and time you enter.

If you delete the issue before the date you enter in the **Send After Date** field, the program does not process the issue and it is not sent to recipients.

- To send the issue immediately, leave the current date and time. After you design the newsletter, click **Send final**. The website processes the email.

Note: Whether you schedule to send the issue of a newsletter in the future or immediately, you cannot edit it once you click **Send final**.

8. In the **Send To** field, the newsletter list automatically appears so the issue only sends to subscribed users.

Note: If recipients do not want to receive your email newsletter, they can unsubscribe from the email list. To enable a recipient to unsubscribe, use the Formatted Text and Images part type to create an unsubscribe footer. For more information, see the *Parts Guide*.

To send the newsletter issue to test recipients before you send it to its final recipients, select the email lists of test recipients to include on the message.

Note: Before you send a newsletter issue to its final recipients, we recommend you first send it to an email list of a few test recipients. The test list recipients can review the newsletter, such as to verify its design displays correctly in multiple email client readers. You can create the email list of test recipients in *Lists*. For more information about test email lists, see [Test Lists on page 72](#).

- a. Click **Test Lists**. The Select Test Lists screen appears.

- b. Enter criteria to narrow the list and click **Filter**. The grid displays the lists that meet the criteria.
 - c. To add a test list to the message, select it and click **Add**. The list appears in the **Selected lists** box. You can include multiple email lists.
 - d. Click **OK**. You return to the New issue page.
9. Edit the default newsletter for this issue. You can edit the layout, design, and text, as well as add or edit articles.
 10. Click **Save**.
 11. Send the issue of the newsletter.
 - If the issue includes an email list of test recipients, send the newsletter to the test recipients. Click **Send test**. Depending on the size of the selected test list, the issue may take a few minutes to send. When the program sends the newsletter issue, you return to *Newsletters*.

After the test recipients verify the newsletter issue and its components look and work correctly, send the email to its final recipients. From *Newsletters*, click **Click here to edit this newsletter**. On the Issues tab, click **Click here to edit this newsletter issue**. When the issue opens, click **Send final**.

- To send the issue to its final target recipients now, click **Send final**. The website processes the message at the date and time entered in the **Send after date** field.
- To send the issue to the test or final recipients at a later time, click **Return**. You return to *Newsletters*. To send the issue, click **Click here to edit this newsletter**. On the Issues tab, click **Click here to edit this newsletter issue**. When the issue opens, click **Send test** or **Send final**.

Note: Each email sent contains a text version in addition to its HTML-formatted version. Email client readers set to display text only show either this text version of the email or its own text version, generated from the HTML. The text version of the email cannot be altered.

➤ View the tabs of a sent newsletter issue

1. From *Email*, click **Newsletters**. *Newsletters* appears.
2. Select a newsletter and click **Click here to edit this newsletter**. The Issues page appears.
3. On the Issues tab, select an issue of the newsletter and click **Click here to view report**. The issue report screen appears.

Note: To create an issue based on an existing issue, you can click **Click here to copy this newsletter issue**. For information about how to design an issue of a newsletter, see [Design and send an issue of a newsletter on page 47](#).

Note: If **Click here to view report** does not appear, the program has not sent the issue.

4. On the Issue report tab, you can view summary information and statistics about the issue on a series of tabs.
 - The Delivery summary tab displays the status of the issue and how many recipients it was sent to. For information about the email statuses, see [Email Delivery Status on page 43](#).
 - On the Issues sent tab how newsletters were opened, not opened, and not delivered.

"Opened" indicates the recipient displayed the newsletter's images or clicked a link in the email.

"Not opened" indicates the newsletter was delivered but the recipient did not display its images or click a link.

"Not delivered" indicates the newsletter "bounced," or could not be delivered. Email delivery may fail for multiple reasons, such as a temporary network issue, a full mailbox, a content filter, or an invalid account. For information about bounced email, see [Bounced Email Management on page 42](#).

Note: If delivery fails because the recipient's Internet Service Provider (ISP) reports that the email address is invalid, the email address is automatically added to *Invalid accounts*. An ISP considers an account invalid if it does not recognize the email address or recipient. For information about *Invalid accounts*, see [Invalid Accounts on page 72](#).

- The Issues not sent tab displays how many newsletters were not sent because of opt-outs, missing addresses, and invalid accounts.

Note: The Issues not sent tab does not appear if the program sends all copies of a newsletter.

To prevent your email address from being blacklisted, the program does not send email to invalid accounts. For information about invalid accounts, see [Invalid Accounts on page 72](#).

- The Click-throughs tab displays all web pages that the newsletter links to, along with how many times recipients click the links and how many unique recipients click the links. For example, if you include a link to an events page, it appears in the grid on the Click-throughs tab. If a recipient clicks that link three times, the **Total views** column for the events page increases by three and the **Unique viewers** column increases by one.

To track click-throughs, the program associates email IDs with email messages. When you include a link in an email message, the program appends a destination link value that includes the email ID to the site URL that you specify in *Sites & settings*. When an email recipient clicks the link, the program redirects the user to the page through the site and then associates any resulting activity with the email ID.

- The Conversions tab displays how many transactions your organization receives as a result of the newsletter. Conversions include donations, event registrations, memberships, and advocacy actions.

For each type of conversion, the tab displays the payment methods used in response to the newsletter, along with the number of transactions for each method and the total amount of those transactions.

- If the newsletter included conditional content, the Conditional Content tab displays statistics about how each condition in a content block performed. It includes the number of recipients that received the condition, the number who opened the email, the number of click-throughs, the number of conversions (transactions), and the total gift amounts. For information about conditional content, see [Add Conditional Content on page 22](#).
5. For additional summary information about your email message, view the Email Status Report. To generate this report, click **Status report**. The Email Status Report screen appears and displays valuable information about your email, such as a "[Prepared]" date and time stamp.
 6. To view who received the issue, select the Recipients tab.
 7. In the grid, view the address that the program sends the email to for each recipient. You can limit the addresses that appear in the grid.
 - a. In the **Filter list by** frame, enter the criteria of the address to view. You can enter the name of the recipient, email address, or email type.
 - b. Click **Go**. In the grid, the addresses that meet the criteria entered appear.
 8. For each email address, view the name of the recipient, when the program sent the email, and when the email was open or bounced.
 - If an email message cannot be delivered to a recipient, the **Bounced** column displays the bounce details.
 - If the recipient opens the email message, the **Opened** column displays the receipt details.
 9. To open a constituent record offline, select a recipient and click **Click here to open this recipient**. If this does not appear, a constituent record does not exist for the user in The Raiser's Edge.

10. If the program cannot deliver an issue, click **Click here to view detailed bounce information** in the **Actions** column to view the bounce error. The Bounce Information screen appears and displays the exact wording of the bounce error. You can use this information to help determine the cause of the bounce error. For more information about bounced email, see [Bounced Email Management on page 42](#).
11. To view the properties and content of the issue, select the Properties tab.
12. In the **Job details** frame, view information such as whom the issue was sent to and from and the sent date.
13. In the **Message content** frame, view the body of the issue.
14. To leave the Issue Report screen, click **Return**.

Acknowledgements

Note: This functionality is deprecated. In current versions, all acknowledgements on new forms are created with a standard default message that is stored in the database and is non-configurable. To modify acknowledgement text for a part, navigate to the part type that uses the acknowledgment functionality and update the message that appears.

You can generate acknowledgement email from part types that contain acknowledgement functionality. For example, you generate acknowledgements from the Donation Form part. *Acknowledgements* contains the default acknowledgement email for your website. You can use this email as the default template for acknowledgement email for part types. In addition, you can view acknowledgement email statistics from *Acknowledgements*.

Warning: It is important your organization assigns full Administrator rights to only a select number of users for *Acknowledgments*. Any change can affect multiple web pages. We strongly recommend only users knowledgeable in all areas of website design and the program perform tasks in *Acknowledgements*.

To prevent acknowledgements from inadvertently sending from a test environment, your System Administrator can use the BlockAllEmails web.config setting to block sending them. By default, this setting is `<add key="BlockAllEmails" value="False" />`. To prevent sending acknowledgements, enter True.

➤ Design a default acknowledgement email

1. From *Email*, click **Acknowledgements**. *Acknowledgements* appears.
2. Beside the Acknowledgement Defaults email, click **Click here to view/edit this acknowledgement's properties**. The Acknowledgement Defaults page appears.

Properties Content

Default Mailing Options

From Address: From Name:

Reply Address:

Notifications are to be sent to the following address

Failures: ☐

Template Security:

| Action | User/Role Name | View | Edit | Change Security |
|--------|----------------|-------------------------------------|--------------------------|--------------------------|
| | Everyone | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

+ Add users and roles

- On the Properties tab, enter an email address and name for the **From** field of the email message.
- To receive responses at a different email address than the one you use to send the message, enter a return address in the **Reply address** field.
- Under **Notifications are to be sent to the following addresses**, select **Failures** to receive failure messages when email messages are not delivered. In the field beside the checkbox, enter an email address to receive failure messages.

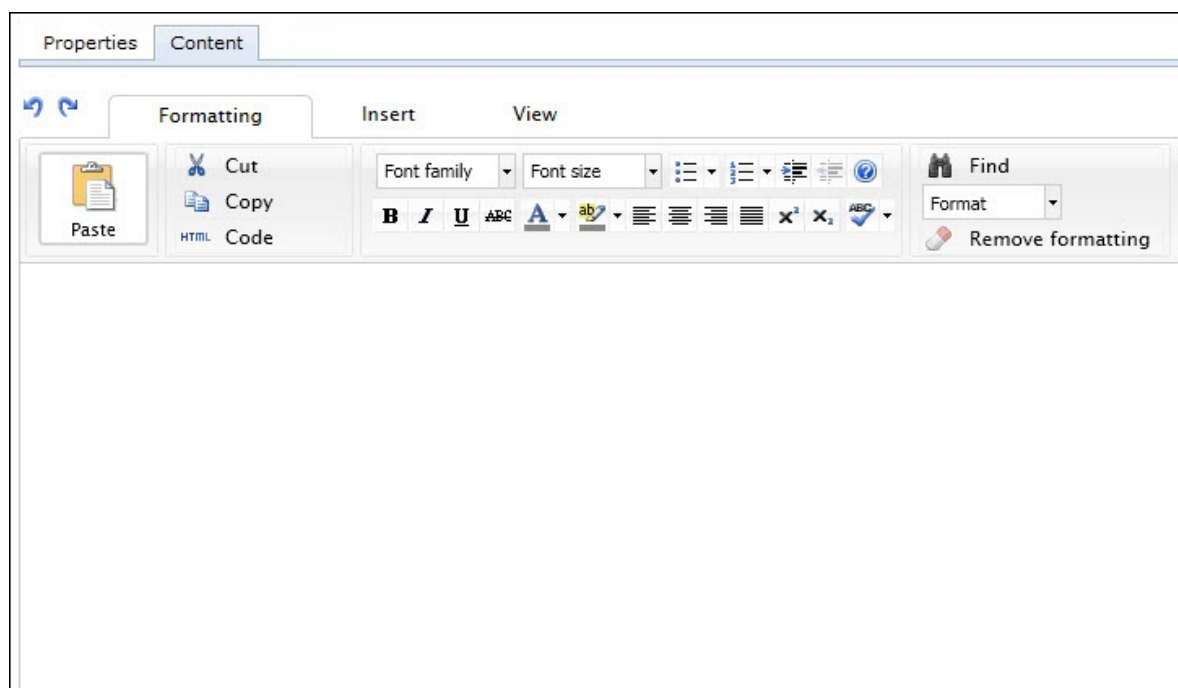
Note: Failures are email addresses that do not receive the acknowledgement email. Failures can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN). For information about how the program handles failed email delivery, see [Bounced Email Management on page 42](#).

- Under **Template Security**, assign the security rights for the acknowledgement. For each user role, you can manage rights to view, edit, delete, and change security.
- To add users or roles, click **Add users and roles**.
- To assign rights, select **View**, **Edit**, **Delete**, or **Change Security**.

Note: Edit rights allow users to edit the template and its defaults. To create email messages from this template, users only need View rights.

For more information about security and user roles, see the *Users & Security Guide*.

- To design the content and appearance of the acknowledgement, select the Content tab.



10. Enter the default text for all acknowledgement email. When you create an acknowledgement email sent from the Donation Form, Membership Form, or Event Registration Form part types, this text automatically appears.
11. To format the default content's appearance and layout, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.

Note: You do not add merge fields on the acknowledgement default email template. Merge fields are available for the individual email message created from donation parts.

12. Click **Save**.
13. To return to *Acknowledgements*, click **Return**.

➤ Design an acknowledgement email for a transaction

You can generate an acknowledgement from part types that contain acknowledgement functionality, such as the Donation Form part or Event Registration Form part. The acknowledgement appears on your website after the site user completes a transaction. In addition, this message is automatically sent in an email to the site user. For the site user to receive an acknowledgement, you must design and create an acknowledgement email for the part type.

1. From the Edit Part screen, access the Acknowledgement Email screen.

Note: How to access the Acknowledgement Email screen depends on the part. For example, on an Event Registration Form part, you click **Acknowledgement email**, while on a Donation Form part, you click **Next** after you design the rest of the form.

Note: The screen shown above is the Acknowledgement Email screen for an Event Registration Form part. Depending on the part type you use, your Acknowledgement Email screen may differ slightly.

Note: For Payment parts, you create a summary acknowledgement email. If you select to send the summary acknowledgement on both the Payment part and the Donation, Event Registration, or Membership Form parts that use the Payment part, a donor receives one email that details all transactions, rather than separate acknowledgement emails for each payment the donor makes during a visit to your website. For information about how to send a summary acknowledgement email, see the *Parts Guide*.

2. Enter a name for the acknowledgement, a subject to include in the **Subject** field of the email message, and an email address and name to include in the **From** field of the email message.
3. To receive responses from recipients at a different email address than the one you use to send the message, click **More Options** and enter the address in the **Reply Address** field.
4. Under **Notifications are to be sent to the following addresses**, select **Failures** to receive failure messages when email messages are not delivered. In the field beside the checkbox, enter an email address to receive failure messages.

Note: Failures are email addresses that do not receive the acknowledgement email. Failures can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN). For information about how the program handles failures, see [Bounced Email Management on page 42](#).

5. If this part uses a Payment part, you can select whether to send a summary acknowledgement email. This email details all donations, event registrations, or membership payments the donor makes with the Payment part during a visit to your website.

- Select **Send this acknowledgement email only when a summary email is not available** to send the Payment part's summary acknowledgement email. If the part does not use a Payment part, the donor receives the acknowledgement email you create on this screen.
 - Select **Always send this acknowledgement email** to send the email you create for this part. If the part uses a Payment part with the summary acknowledgement email option selected, the donor receives both individual and summary acknowledgement emails.
6. In the box, the text from the default acknowledgement email appears. To enter or edit the content of the email as required, use the HTML editor. For information about the HTML editor, see the *Program Basics Guide*.

To customize email content, click **Merge fields** on the Insert tab in the toolbar. To format the email content's appearance and layout, use the HTML editor.

Note: You can include conditional fields in your acknowledgement email. Conditional fields do not appear in the final email if they do not apply to the transaction being acknowledged. For example, for a donation acknowledgement, you can enter "We greatly appreciate <Company Name>'s support!" If the donation is not from a company, this sentence does not appear in the final acknowledgement. To identify conditional fields, look for "begin section" and "end section" indicators. For example, <Corporate.Begin Section> and <Corporate.End Section> indicate that the sentence with <Company Name> is conditional.

7. Click **Save**. You return to the Edit Part screen.
8. Click **Save**. You return to *Parts*.

➤ View the tabs of a sent acknowledgement email

1. From *Email*, click **Acknowledgements**. *Acknowledgements* appears.
2. Select an acknowledgement and click **Click here to view report**. The acknowledgement report appears.
3. On the Acknowledgement report tab, you can view summary information and statistics about the acknowledgement on a series of tabs.
 - The Delivery summary tab displays the status of the email and how many recipients it was sent to. For information about email statuses, see [Email Delivery Status on page 43](#).
 - The Acknowledgements sent tab displays how many acknowledgements were opened, not opened, and not delivered.

"Opened" indicates the recipient displayed the acknowledgement's images or clicked a link in the email.

"Not opened" indicates the acknowledgement was delivered but the recipient did not display its images or click a link.

"Not delivered" indicates the acknowledgement "bounced," or could not be delivered. Email delivery may fail for multiple reasons, such as a temporary network issue, a full mailbox, a content filter, or an invalid account. For information about bounced email, see [Bounced Email Management on page 42](#).

Note: If delivery fails because the recipient's Internet Service Provider (ISP) reports that the email address is invalid, the email address is automatically added to *Invalid accounts*. An ISP considers an

account invalid if it does not recognize the email address or recipient. For information about *Invalid accounts*, see [Invalid Accounts on page 72](#).

- The Acknowledgements not sent tab displays how many acknowledgements were not sent because of missing addresses and invalid accounts.

Note: The Acknowledgements not sent tab does not appear if the program sends all copies of an acknowledgement.

To prevent your email address from being blacklisted, the program does not send email to invalid accounts. For information about invalid accounts, see [Invalid Accounts on page 72](#).

- The Click-throughs tab displays all web pages that the acknowledgement links to, along with how many times recipients click the links and how many unique recipients click the links. For example, if you include a link to an events page, it appears in the grid on the Click-throughs tab. If a recipient clicks that link three times, the **Total views** column for the events page increases by three and the **Unique viewers** column increases by one.

To track click-throughs, the program associates email IDs with email messages. When you include a link in an email message, the program appends a destination link value that includes the email ID to the site URL that you specify in *Sites & settings*. When an email recipient clicks the link, the program redirects the user to the page through the site and then associates any resulting activity with the email ID.

4. To view the acknowledgement's recipients, select the Messages tab. The grid displays names and email addresses of recipients, along with dates and times for when the program sent the email and when it was opened or bounced.

Note: Users continue to receive acknowledgement emails even if they select the global opt-out checkbox on your user email preferences form.

5. To search for a recipient, enter a name or email address or select a status, and click **Filter**. The recipients that match your criteria appear.
 - If a recipient opens the email message, receipt details appear under **Opened**.
 - If an email message cannot be delivered, bounce details appear under **Bounced**. To view the bounce error, click **Click here to view detailed bounce information**. The Receipt Information screen displays the bounce error. You can use this information to help determine the cause. For information about bounced emails, see [Bounced Email Management on page 42](#).
 - If an email address is invalid, "No Valid Recipients" appears under **Status**. For information about how to manage invalid accounts, see [Invalid Accounts on page 72](#).
6. To open a constituent record offline, select a recipient and click **Click here to open this record**. If this does not appear, a constituent record does not exist for the user in The Raiser's Edge.
7. To open a website user's online record, select a recipient and click **Click here to view this user's record**. The User editor page in *Users & security* appears.
8. To return to *Acknowledgements*, click **Return**.

Notifications

A notification is an email message designed to notify constituents or staff members about a specific action. For example, a website user can select to send a notification when he receives a new personal message, friend request, or group invitation. A staff member can receive a notification when a website user submits a donation.

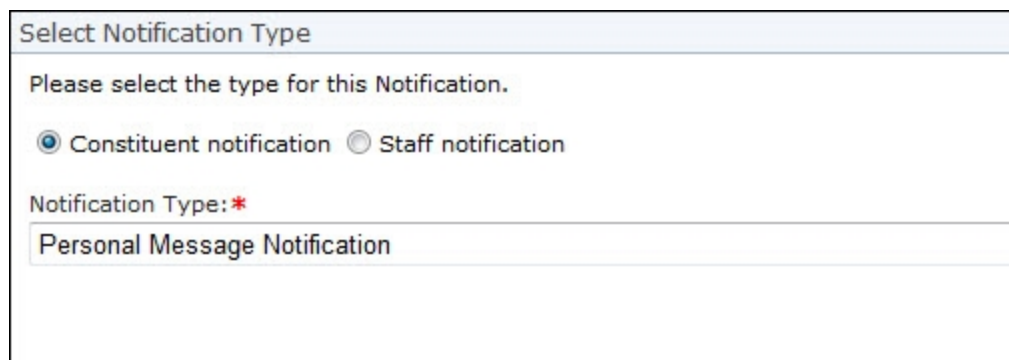
You create and design most notifications in *Notifications*. However, you can also design and edit associated notification types on some parts. For example, you can create user network notifications when you design the User Networking Manager part.

Note: Even if a user selects the global opt-out checkbox on your website to decline email communications, she continues to receive requested notifications.

➤ Design a constituent notification

Tip: When you create a notification, consider the email volume recipients will receive. For example, if you are expecting a high volume of donations on your website, you may not want to create a notification for those transactions because the recipients will receive numerous email notifications.

1. From *Email*, click **Notifications**. *Notifications* appears.
2. Click **New notification**. The Select Notification Type screen appears.



Select Notification Type

Please select the type for this Notification.

☒ Constituent notification ☐ Staff notification

Notification Type: *

Personal Message Notification

3. Select whether the notification is for a constituent or a staff member.
4. In the **Notification Type** field, select the type of constituent notification to create.
 - To create a notification for a solicitor who receives a donation, select "Fundraiser Participant Donation Acknowledgement."
 - To create a notification for a fundraiser team captain whose team receives a donation, select "Fundraiser Team Captain Donation Acknowledgement."
 - To create a notification for a fundraiser team captain whose team receives a participant sign-up, select "Fundraiser Team Captain Sign-up Acknowledgement."
 - To create a notification for a user networking member who receives a personal message from another member, select "Personal Message Notification."

- To create a notification for a user networking member who receives a request from another member to be in a contact list, select "Friend Request Notification."
 - To create a notification for a user networking member who receives an invitation to join a user networking group, select "Group Invitation Notification."
 - To create a notification for a user networking member who receives a personal message from another member sent from the directory results, select "Directory Message Notification."
5. Click **OK**. The New Notification page appears and defaults to the Notification tab.

Notification Email template

Personal Message Notification. Email me when someone sends me a personal message.

General

Display name: *

Enabled: ☐

Parts

Select the parts to use this notification

☐ Online Community

6. In the **Display name** field, edit the name of the notification so that users can identify it. By default, the notification type appears.
7. When you no longer want to send the notification to recipients, clear **Enabled**.

Tip: As you create the notification, consider the email volume the notification will generate. For example, if you expect a high volume of donations on your website, recipients are likely to receive numerous emails from a transaction donation notification. To avoid sending a large volume of email notifications to recipients, clear **Enabled** to disable the notification until donation transactions return to normal.

8. Under **Parts**, select the checkbox for each part to use the constituent notification.
9. To design the email, select the Email template tab.

10. Enter a subject in the **Subject** field and an email address and name in the **From** fields for the email message.

Note: You cannot view the notification template in *Templates*. You can only access it from *Notifications*.

11. The bottom pane displays default text for the notification. You can use this text or enter your own. To format the appearance and layout, use the HTML editor. For more information, see the *Program Basics Guide*.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors such as *Gmail* and *Outlook* are not guaranteed to render the styles correctly when the recipient reads the email.

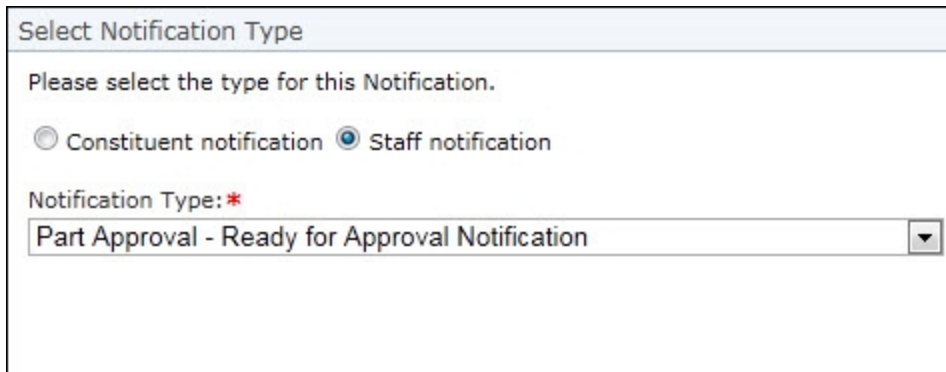
To personalize the email with offline information about the constituent, add merge fields.

- a. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar.
 - b. To add a merge field to the email, double-click it or drag and drop the field in the content area.
 - c. In the body of the email, add fields where you want them to appear. To move a field, click and drag it.
12. Click **Save**. You return to *Notifications*.

> Design a staff notification

Tip: When you create a notification, consider the email volume recipients will receive. For example, if you are expecting a high volume of donations on your website, you may not want to create a notification for those transactions because the recipients will receive numerous email notifications.

1. From *Email*, click **Notifications**. *Notifications* appears.
2. Click **New notification**. The Select Notification Type screen appears.
3. Select **Staff notification**.



4. In the **Notification Type** field, select the type of staff notification to create.
 - To create a notification for a staff member in the approval role when someone submits a Formatted Text and Images or Formatted Text and Images (Secured) part for approval, select "Part Approval – Ready for Approval Notification."
 - To create a notification for a content author staff member whose Formatted Text and Images or Formatted Text and Images (Secured) part is approved, select "Part Approval – Published Notification."
 - To create a notification for a content author staff member whose Formatted Text and Images or Formatted Text and Images (Secured) part is rejected, select "Part Approval – Rejected Notification."
 - To create a notification for a staff member when a website user submits a donation, select "Transaction – Donation Notification."

Note: The program sends this notification when a user submits a donation on the Donation Form, Payment, or Payment 2.0 parts.

- To create a notification for a staff member when a website user submits an event registration, select "Transaction – Event registration notification."
 - "To create a notification for a staff member when a website user submits a membership transaction, select "Transaction – Membership notification."
5. Click **OK**. The New Notification page appears and defaults to the Notification tab.

New Notification

Save

Return

Notification

Email template

Transaction - Donation Notification. Sends an email when someone submits a donation.

General

Display name: *

Enabled: ☐

Recipients

Roles:

[Select all](#) | [None](#) [+ Add roles](#)

Email addresses: ?

Parts

Select the parts to use this notification

☐ Donation form

6. In the **Display name** field, edit the name of the notification so that users can identify it. By default, the notification type appears.
7. When you no longer want to send the notification to recipients, clear **Enabled**.

Tip: As you create the notification, consider the email volume the notification will generate. For example, if you expect a high volume of donations on your website, recipients are likely to receive numerous emails from a transaction donation notification. To avoid sending a large volume of email

notifications to recipients, clear **Enabled** to disable the notification until donation transactions return to normal.

8. Under **Recipients**, to send the notification to staff members in a role, click **Add roles**. The Select Roles screen appears so you can include one or more roles.
 - a. To send the notification to an individual staff member, enter an email address under **Email addresses**.

Note: You can select to send the notification to staff members in roles instead of, or in addition to, staff members you enter email addresses for. When you enter multiple email addresses, separate them by a comma or semicolon.

9. When you design a transaction notification, such as "Transaction – Donation Notification," under **Parts**, select the checkbox for each part to use the staff notification.
 When you design a "Part Approval" notification, such as "Part Approval – Ready for Approval Notification," under **Workflows**, select the checkbox for each workflow to use the staff notification.
10. To design the email, select the Email template tab.

11. Enter a subject in the **Subject** field and an email address and name in the **From** fields for the email message.

Note: You cannot view the notification template in *Templates*. You can only access it from *Notifications*.

12. The bottom pane displays default text for the notification. You can use this text or enter your own. To format the appearance and layout, use the HTML editor. For more information, see the *Program Basics Guide*.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors such as *Gmail* and *Outlook* are not guaranteed to render the styles correctly when the recipient reads the email.

To personalize the email with offline information about the constituent, add merge fields.

- a. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar.
- b. To add a merge field to the email, double-click it or drag and drop the field in the content area.
- c. In the body of the email, add fields where you want them to appear. To move a field, click and drag it.

13. Click **Save**. You return to *Notifications*.

➤ View the tabs of a notification

1. From *Email*, click **Notifications**. *Notifications* appears.
2. To search for a notification, enter criteria to narrow the list in the grid and click **Filter**. The notifications that match your criteria appear.
3. Select a notification and click **Click here to edit this Notification**. The notification appears.

4. Edit the notification as necessary. For information about the Notification and Email template tabs, see [Design a constituent notification on page 58](#) or [Design a staff notification on page 61](#).

Note: You cannot change the notification type. To do this, you must delete the notification and create a new one. For information about how to delete a notification, see [Delete a notification on page 65](#).

5. Click **Save**. You return to *Notifications*.

To return to *Notifications* without saving any changes, click **Return**.

➤ Delete a notification

1. From *Email*, click **Notifications**. *Notifications* appears.
2. To search for a notification, enter criteria to narrow the list in the grid and click **Filter**. The notifications that match your criteria appear.
3. Select the notification to delete and click **Click here to delete this Notification**. A confirmation message appears.
4. Click **OK**. You return to *Notifications*. The grid no longer displays the notification.

Lists

In *Lists*, you can use queries from our programs to create and view email lists. You can create multiple email lists, each one targeted at a different group of your users. For example, you can create an offline query of all constituents in your database who have an attribute of Sports on their records. You can use the query online to create an email list of constituents interested in sports and invite them to your sporting event fundraisers. In the email message, you can include a link to the page of your website where the recipient can sign up for the event.

Tip: We recommend you create a list of users to receive an email message as a test before you send the message to its final recipients. The test list recipients can review the message to verify that the message appears correctly in multiple email client readers. For more information about test email lists, see [Test Lists on page 72](#).

You can use static or dynamic queries but not queries that contain “ask at runtime” operators. If the query is dynamic, the program automatically updates the list in *Lists*. However, if the query is static, the list does not automatically update. To update a list that uses a static query, refresh the query in the other program. For more information about how to create and refresh a query, see the **Query** section of the help file of the other Blackbaud program.

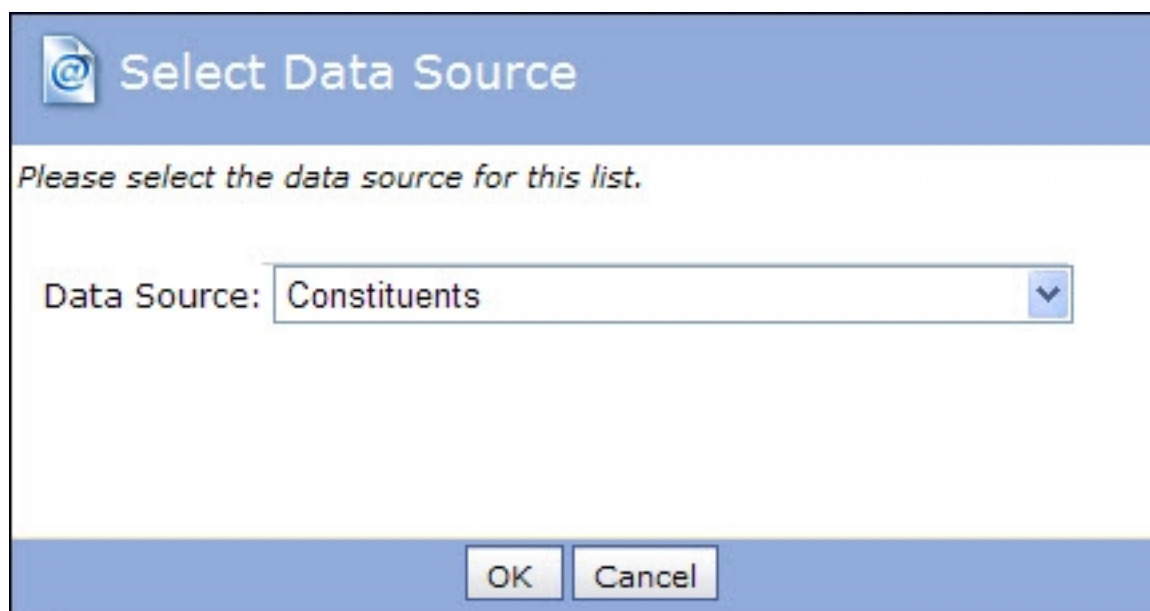
The grid in *Lists* contains all email lists created in *Lists* but also those automatically generated when you send a newsletter. Newsletter lists contain only users who subscribe to the newsletter so the generated list name is always “[Newsletter Name] Subscribers.” You can add, delete, and view email lists in the grid.

Tip: For best practice information about email, refer to [Blackbaud Communication Services Best Practices for Email](#).

➤ Create an email list

Show Me: Watch [how to create an email list](#).

1. From *Email*, click **Lists**. *Lists* appears.
2. Click **New list**. The Select Data Source screen appears.



3. In the **Data Source** field, select the type of recipients to include in the list. The data source determines the pool of people that are available.
 - To create a list of recipients based on a constituent query, select "Constituents." From the Properties tab, click **Add query** to select a constituent query created in your offline database. When you select this option, the recipients include only constituents who are individuals. To include constituents that are organizations, you must select "Imported Lists" as the data source and choose an import file that contains the organizations to include.

In addition, individuals in a "Constituents" data source list must have an email address that matches the type selected in the **Email address type** field on the template or message, an email address marked as primary in The Raiser's Edge, or an email address with the same phone type that is mapped to **Email** under **Phone type mapping** on the Settings tab in *Sites & settings*. For more information, see the *Administration Guide*. If the constituent's record does not have an email address that matches any of these types, the individual does not receive the message. When an individual's record is marked **Requests no email**, the individual is excluded from the list and does not receive the email message.

In The Raiser's Edge, a record is created for the email messages that you send to a list with the "Constituents" data source. And if recipients opt out of future email communications, this is noted on their constituent records.

- To create a list of recipients that includes all your Blackbaud NetCommunity users, select "Registered Users." This source includes all registered website users who did not opt out of email communications, including those who are linked to constituents.

Note: Only users with Supervisor rights can select "Registered Users."

Email messages to a list with the "Registered Users" data source are not recorded in The Raiser's Edge. If recipients opt out of email communications, this is noted in Blackbaud NetCommunity but not on constituent records in The Raiser's Edge.

- To create a list based on information you will import from a list in *.csv format, select "Imported Lists." From the Properties tab, click **Browse** under **Load file** to search for the file to

import. After you select an import file, click **Next**. Under **Field mapping**, select the import file fields that correspond to the email and display name fields in your online database.

Note: If you previously linked an import file to the list, click **Replace this file** under **Uploaded file details** to select a different import list. This button is available until you use the list to send an email from *Messages*. The program removes the **Replace this file** option when you use the list as the data source for *Templates*.

- To create a test list for a limited number of recipients, select "User Defined." For example, before you send a mass email, you may want to send the message to accounts you have with different email services to determine how the text and graphics appear in the email client readers. From the New List screen, you can enter a name for the list and a description. Click **Save**, then open the new list. From the View/Edit List tab, enter each recipient to include. Select **Enabled** to allow the recipient to receive the message.
4. Click **OK**. The New List page appears.

The screenshot shows a dialog box with two tabs: 'Properties' and 'Targeting & Security'. The 'Targeting & Security' tab is active. It contains the following fields:

- Data Source:** Constituents
- List Name:** < Enter a name for this List >
- Description:** (An empty text area with a vertical scrollbar on the right side.)

5. On the Properties tab, the **Data Source** field displays the data source you selected.

Tip: You also select a data source on each email template. Messages created from the template can be sent to only lists that use the same type of data source. For more information, see [Template Data Sources on page 19](#).

6. In the **List Name** field, enter a unique name to distinguish this group for specific email messages, such as "Class of 1994."
7. In the **Description** field, enter any additional information. For example, enter a brief description of who the mailing list includes or the types of email messages this list receives, such as "Class of 1994 Alumni."

When a user creates an email in *Messages* and clicks **Send to**, the program displays all saved email lists that the user has security rights to.

8. If you select "Constituents" as the data source, the **Constituent Queries** frame appears.

The screenshot shows a web interface with two main sections. The top section, titled 'Constituent Queries', contains the instruction 'Select one or more queries for populating this list.' Below this is a horizontal list box with a grey background and a blue 'Add Query' button to its right. The bottom section, titled 'List Status', contains the text: 'The loading of the data for this new list will begin when the list is saved. This may take several minutes, depending upon the amount of data in the list.'

- To add a query, click **Add Query**. The Query Search screen appears. Select a query for the email list. For a query to appear as a selection, it must first be created in the other program.
- To add another query, click **Add Query**. You can add queries until you select all queries required for the email list.

Tip: Depending on your website environment and configuration, sending an email message to a large list of recipients may result in performance issues. If you experience this, we recommend you include smaller queries in the list. You can also remove queries from the list.

- To replace a query, click **Change** beside the query. The Query Search screen appears.
 - To remove a query, click **Remove** beside the query.
9. If you select "Imported Lists" as the data source, the **Load File** frame appears. In the **File** field, select the comma-separated values (*.csv) file to import for the email list. To map to the location of the import file, click **Browse** and use the Choose File screen.

Load File

To upload the data for your list, use the **Browse** button to select the file containing the data. This file must be in the standard .CSV format, with the first row of the file containing the field names.
After selecting the file click the **Next** button to continue.

File:

List Status

The loading of the data for this new list will begin when the list is saved. This may take several minutes, depending upon the amount of data in the list.

Note: The first row of the imported *.csv file must contain the field names.

After you select the import file, the **Uploaded file details** and **Field mapping** frames appear.

- a. In the **Uploaded file details** frame, the **File name** field displays the selected import file. To import a different file, click **Replace this file**. The **Load file** frame appears.
 - b. In the **Field mapping** frame, select the fields from the import file to use as the email address and recipient display name in the email list.
10. To assign security rights for the list, select the Targeting & Security tab. For each user role, you can manage rights to view, edit, delete, and change security.

Properties

Targeting & Security

| Action | User/Role Name | View | Edit | Delete | Change Security |
|--------|----------------|-------------------------------------|--------------------------|--------------------------|--------------------------|
| | Everyone | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

+ Add users and roles

11. To add users or roles, click **Add users and roles**.

12. To assign rights, select **View**, **Edit**, **Delete**, or **Change Security**.

For more information about security and user roles, see the *Users & Security Guide*.

13. Click **Save**. You return to *Lists*.

➤ View the tabs of an email list

1. From *Email*, click **Lists**. *Lists* appears.
2. Select a list and click **Click here to edit this list**. The list appears.
3. To view the messages created based on the email list:
 - a. Select the List Messages tab.

| Action | Name | Subject | Template | Date sent |
|--------|------|---------|----------|-----------|
|--------|------|---------|----------|-----------|

- b. Under **Filter list by**, enter the criteria of the messages to view. You can enter the message's name or subject. You can also select to view results by the template used.
- c. Click **Go**. The grid displays the messages that meet the criteria.

Note: The grid can display up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results, or select the page number to view.

4. To view the properties and security settings entered when the list was created, select the List Properties tab. To help you navigate through the information, the List Properties tab contains the Properties and Targeting & Security tabs.

- On the Properties tab, view the data source, list name, description, and the queries or load file entered when the list was created.

When you host multiple sites, the **Assign to site** field appears on the Properties tab so you can move a list from its current site to another site. If the list is in use on the source site, it continues to be on that site. However, the list is now associated with the target site and its security.

- On the Targeting & Security tab, view the security rights assigned to each user of the email list.
5. If the email list is based on a query of records, the View List tab appears. To view the recipients included in the list:
 - a. Select the View List tab.

| Display name | Email | Opted out | Source query |
|----------------------|-----------------------|-----------|---------------|
| Andrea L. Tidwell | tidwell1@earthnet.com | | Board Members |
| Christopher T. Young | doctors@net.net | | Board Members |
| Elizabeth A. Ashton | | | Board Members |
| Nicholas Vincent | | | Board Members |
| Bob Evans | | | Board Members |

- b. Under **Filter list by**, enter the criteria for the record to view. You can enter the record's display name or email address. You can also select to view results by the source query or email status or whether to view opt-outs.

Note: If you create a query in another program, you may need to refresh Blackbaud NetCommunity for it to appear as a selection. To refresh, select **View, Refresh** from the menu bar.

Note: If you create a query in another area, you may need to refresh for it to appear as a selection. To refresh, select **View, Refresh** from the menu bar.

- c. Click **Go**. The grid displays the records in the list that meet the criteria.

Note: The grid can display up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results, or select the page number to view.

6. To view the email templates created that use the email list:
 - a. Select the List Templates tab.

| Action | Name | Description | Subject | Data source |
|--------|----------------|----------------|--------------|--------------|
| | Email Template | Email Template | Sample Email | Constituents |

1 email template meets selected criteria

- b. In the **Filter list by** frame, enter the criteria for the template to view.
- c. Click **Go**. The grid displays the templates that meet the criteria.

Note: The grid can display up to 50 results at a time. If you have more than 50 results, click **Prev** or **Next** to page through the results, or select the page number to view.

7. To return to *Lists*, click **Return**.

Test Lists

In *Lists*, you can create a list of users to receive an email message or a newsletter issue as a test before you send the email to its final recipients. The test list recipients can review the message or newsletter to confirm that its design displays correctly in multiple email client readers. From *Lists*, create a list based on the “User Defined” data source. Save the list, then open it and select the View/Edit list tab. From this tab, you can manually enter email addresses for the recipients to receive the test message.

When you design the email message or newsletter issue, you can select its test list and perform a test send to the users in the list. For information about how to create an email list, see [Lists on page 65](#). For information about how to design an email message, see [Messages on page 30](#). For information about how to design a newsletter issue, see [Newsletters on page 44](#).

Note: Test messages do not display merge field data; placeholders are included where the merge data will appear in the final message. To test merge fields, select the test list in the **To** field and then select **Send final**.

Invalid Accounts

In *Invalid accounts*, you can view email address accounts that have been reported as invalid by their hosting Internet Service Provider (ISP). For example, an ISP may report an email address account as invalid due to a nonexistent or canceled account. Typical causes of an invalid account occur when the email address contains a typographical error or the email account is canceled due to inactivity. Accounts that bounce email for another reason, such as a temporary network issue, a full mailbox, or a content filter, do not appear in *Invalid accounts*.

Note: For information about how the program handles accounts that bounce email but are still valid, see [Bounced Email Management on page 42](#).

To prevent your email address from being blacklisted, the program does not send email to invalid accounts. For each email address in *Invalid accounts*, you can view the bounce error that caused the ISP to report the account as invalid. If you think an account was incorrectly marked invalid, you can mark it as valid to include it in mailings.

➤ View invalid email address accounts

1. From *Email*, click **Invalid accounts**. *Invalid accounts* appears.

Invalid accounts

Help

In *Invalid accounts*, you can view email addresses that return hard bounces because of nonexistent accounts or other permanent failures. **Blackbaud NetCommunity** no longer sends email to these addresses. [Learn more about managing invalid accounts.](#)

Email address:

| Mark as valid | Email address | Attempts | Created | Updated |
|---------------|-------------------------------|----------|---------------------|---------------------|
| | abby.greenfield@blackbaud.com | 1 | 4/23/2008 10:00 AM | 4/23/2008 10:00 AM |
| | bbtest@abc123.com | 1 | 1/20/2009 4:47 PM | 1/20/2009 4:47 PM |
| | dorrion.ryan@aotw.com | 1 | 9/8/2009 3:28 PM | 9/8/2009 3:28 PM |
| | james.t.kirk@sfa.space | 1 | 4/10/2008 11:09 AM | 4/10/2008 11:09 AM |
| | john@aol.com | 1 | 11/24/2008 12:43 PM | 11/24/2008 12:43 PM |

The grid displays any email address that a hosting ISP reports as invalid. The **Attempts** column displays the number of bounce errors you receive for an account, while the **Created** and **Updated** columns display when you receive the first and last bounce errors.

Note: The program does not send email to invalid addresses, so typically the **Attempts** column displays a single bounce error and the **Created** and **Updated** columns display the same date and time. However, if you mark an account as valid and it returns a bounce error, the **Attempts** column displays multiple bounce errors and the **Updated** column displays the date and time of the most recent bounce error.

- To export the email addresses in the grid to a *.csv file, click **Export to .csv**. You can open the file or select a location to save it.
- To search for an email address, enter it in the **Email address** field and click **Filter**.
- To view bounce error details, select an account and click the edit icon in the **Mark as valid** column. The invalid account page appears.

l@bb.com

Mark as valid
 Return

To remove an email address from *Invalid accounts*, use **Mark as valid**. You should only do this when you are sure the address is valid. Otherwise, the address returns another hard bounce and returns back to *Invalid accounts*.

| Email | Sent | Bounced | Bounce message |
|---|------|---------|--|
| Bridge Run Email Template sent on 7/17/2006 at 11:06:56 by kelly.jarrett 8/8/2006 1:53:56 PM 1/15/2010 7:50:30 AM | | | Original-Recipient: RFC822; Final-Recipient: RFC822; Action: failed Remote-MTA: DNS; ncm2.blackbaud.com Last-Attempt-Date: Thu, 08 Oct 2009 15:15:21 - 0400 |

For each bounce error, the grid displays the subject of the email, when you sent the message, when you received the bounce error, and the exact wording of the bounce error you received from the hosting ISP.

5. To mark the account as valid so that you can send email, click **Mark as valid**. You return to *Invalid accounts*, the email address no longer appears in the grid. If you send email to the address and the hosting Internet service provider (ISP) reports it as invalid, the email address returns to *Invalid accounts*.
6. To return to *Invalid accounts*, click **Return**.

eCard Templates

eCard templates stores the eCard designs for your website. After you create an eCard template, you can use it with as many parts that contain eCard functionality as you want. For example, you can save a holiday theme eCard in *eCard templates* and use it with multiple eCards and Donation Form parts. You can provide a selection of eCard templates that website users can personalize and send for free or as an incentive to donate. eCards can also help promote your organization and drive new users to your website. From *eCard templates*, you manage your organization's eCard templates in one location.

On the Samples tab, *eCard templates* also provides sample eCard templates. You can copy these samples to create eCard templates. For information about the sample templates, see [Sample eCard Templates on page 84](#).

Note: eCards do not apply to the web.config setting BlockScheduledEmails. Therefore, if you have this setting set to True to prevent email from sending from a test environment, recipients will continue to receive them.

➤ Design an eCard template

To add an eCard template to an eCards part or Donation Form part that contains eCard functionality, you must first create the template in *eCard templates*. *eCard templates* stores the templates within categories. When you add an eCard template, you specify how the template appears on parts and select the categories in *eCard templates* where it belongs. On your website, users select the template and use it to send personalized eCards to others as email messages.

1. From *Email*, click **eCard templates**. *eCard templates* appears.

Tip: On the Samples tab, *eCard templates* provides sample eCard templates. To save time, you can copy a sample template to create an eCard template. For information about how to copy a sample eCard template, see [Sample eCard Templates on page 84](#).

2. Click **Add eCard template**. The Add eCard template screen appears.
3. Select the Properties tab.

Add eCard template

Properties Design

Display Options
When users browse eCards, the cards are sorted by name. The preview image will be resized according to the eCard part's thumbnail settings. The caption will be seen as a tooltip when hovering over this eCard Template's thumbnail.

Name: *

Preview image: ... *

Caption:

Email Options
Whenever an eCard is sent, a specific subject line can be offered using the option below.

Email subject line:

eCard Categories
Select one or more categories to which this eCard Template will belong.

Categories: ☒ Holiday

And/or a new category:

4. Under **Display options**, enter how the template appears for users in *eCard templates* or *Parts* and on your website.
 - a. In the **Name** field, enter a name so users can identify the eCard template.

Note: When program and website users browse through eCard templates, such as on the eCards part or your website, the templates appear in alphabetical order by name. When you enter a name for the eCard template, consider where the template name appears when sorted alphabetically.

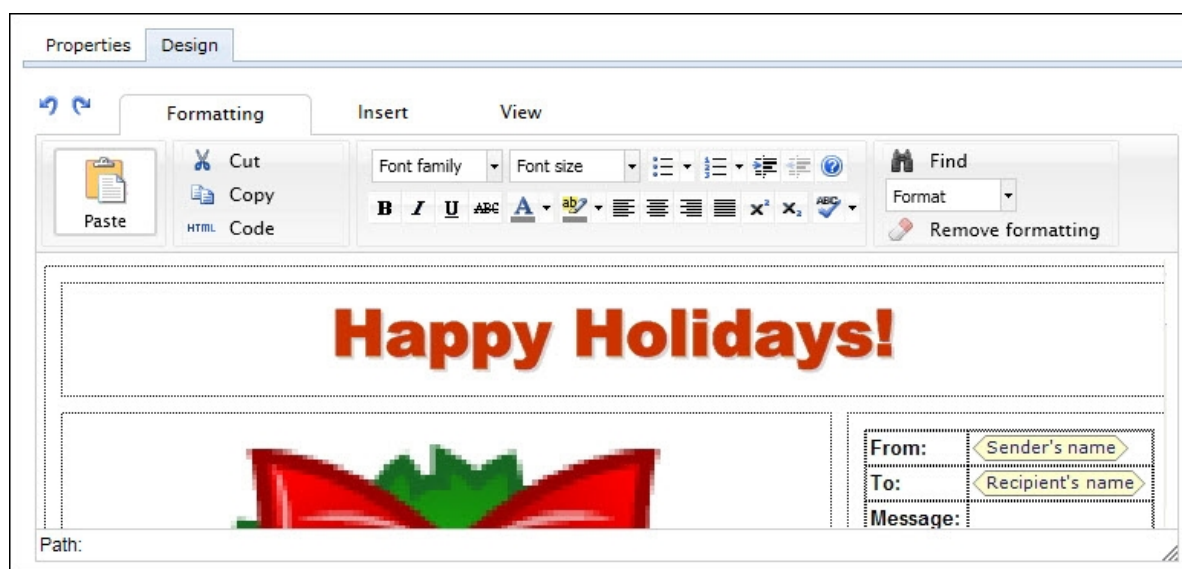
- b. In the **Preview image** field, select the path to the image to use as the thumbnail image for the eCard. To search for the image, click **Browse** and use the Choose file screen. After you map to the image location, click **Open**. You return to the Add eCard Template screen.

Note: On your website, the image entered in the **Preview image** field appears as a thumbnail image. The specifications selected on the eCards or Donation Form part determine the size of the thumbnail image on your website.

- c. In the **Caption** field, enter the caption text to appear for the eCard template. When a website user hovers the cursor over the thumbnail image of the template, the caption text appears as a tooltip.
5. Under **Email options**, in the **Email subject line** field, enter the subject line to appear for all eCard email messages based on the template. For example, for a seasonal holiday eCard, enter "Happy Holidays!"

6. *eCard templates* stores every eCard template within a category. Under **eCard categories**, select the category the template belongs to. For example, you can store a Happy Holidays eCard under a category of "Holiday." You can add the template to multiple categories.
 - To add the template to an existing category, select its checkbox in the **Categories** box.
 - To add the template to a new category, in the **And/or a new category** field, enter the name of the new category.
7. Select the Design tab.
8. Use the HTML editor to format the template's appearance and layout. For more information about the HTML editor, see the *Program Basics Guide*.

Warning: Blackbaud recommends that you use inline styles, such as `<div style="background-color:Blue;">Welcome color</div>`, when you create and design the email content. Do not define classes or use external references because email vendors, such as *Gmail* or *Outlook*, are not guaranteed to render the styles correctly when the recipient reads the email.



Tip: When you design an eCard template, you can insert images from the *Image Library*. If you reference an image in an eCard template and then remove the image from the *Image Library*, eCards based on the template cannot display the image.

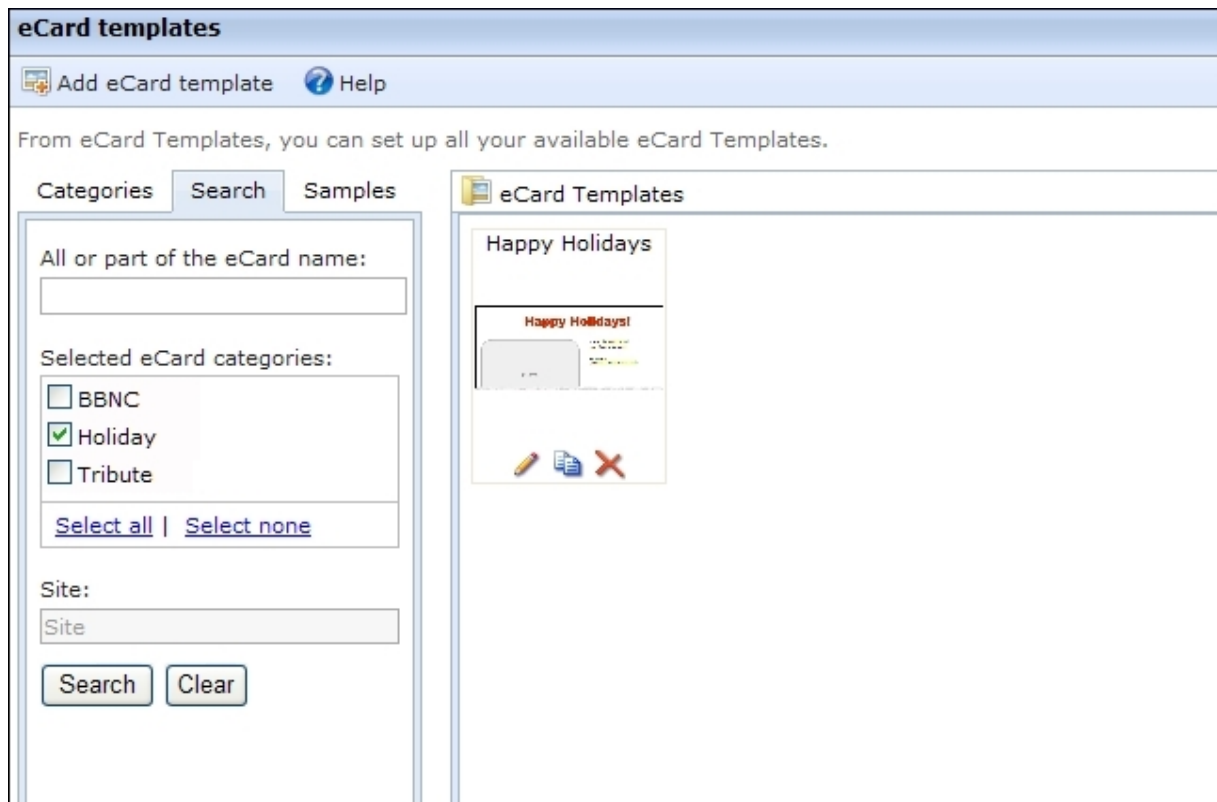
To allow website users to personalize eCards based on the template with sender and recipient information, add merge fields. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar. To expand the list, click the plus sign next to **eCard fields**. For information about the merge fields that appear when you design an eCard template, see [eCard Template Merge Fields on page 85](#).

Note: To allow website users to send a personal message with eCards based on the template, you must include the **<Sender's personal message>** merge field. If you do not use this merge field on a template, the option to add a personal message does not appear when the user personalizes the eCard on your website.

9. Click **Save**. You return to *eCard templates*.

➤ Edit an eCard template

1. From *Email*, click **eCard templates**. *eCard templates* screen appears.
2. Browse the Categories tab or click the Search tab to find the eCard template to edit.



3. The **eCard templates** frame displays the templates that meet your criteria.

Note: In *eCard templates*, you can preview an eCard template to verify it is the one to edit. Under **eCard templates**, click the image of the template. A larger version of the image appears. To return to *eCard templates*, click the larger image.

4. Under **eCard templates**, click **Edit** under the template to edit. The eCard Template Properties screen appears and opens to the Properties tab.

Properties

Design

Display Options

When users browse eCards, the cards are sorted by name. The preview image will be resized according to the eCard part's thumbnail settings. The caption will be seen as a tooltip when hovering over this eCard Template's thumbnail.

Name:

Preview image: *

Caption:

Email Options

Whenever an eCard is sent, a specific subject line can be offered using the option below.

Email subject line:

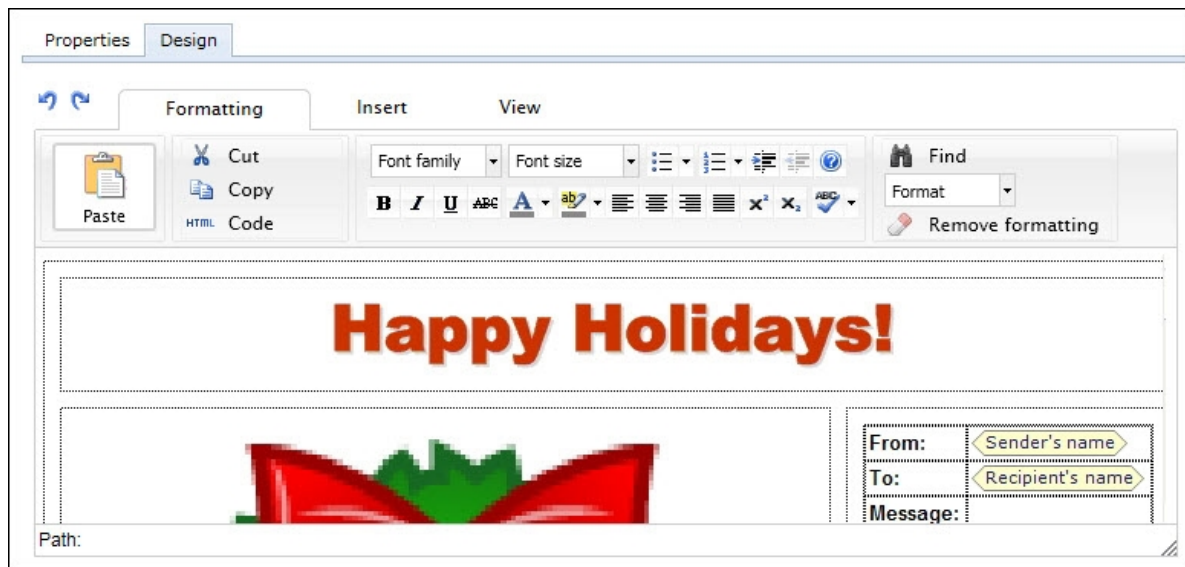
eCard Categories

Select one or more categories to which this eCard Template will belong.

Categories: ☒ Holiday

And/or a new category:

- Adjust the display options, subject line, or categories for the eCard template.
When you host multiple sites, the **Assign to site** field appears on the Properties tab so you can move a template from its current site to another site. If the template is in use on the source site, it continues to be on that site. However, the template is now associated with the target site and its security.
- To adjust the design of the eCard template, select the Design tab. Use the HTML editor to format the template's appearance and layout.



For information about how to design an eCard template, see [Design an eCard template on page 74](#).

Note: If you adjust the design of an eCard template, the change affects only the eCards that are based on the template and sent after the adjustment. The adjustment does not affect eCards sent before the design change.

7. Click **Save**. You return to *eCard templates*.

➤ Copy an eCard template

1. From *Email*, click **eCard templates**. *eCard templates* appears.
2. Browse the Categories tab or click the Search tab to find the eCard template to copy.

eCard templates

Add eCard template Help

From eCard Templates, you can set up all your available eCard Templates.

Categories Search Samples

All or part of the eCard name:

Selected eCard categories:

☐ BBNC
☒ Holiday
☐ Tribute

[Select all](#) | [Select none](#)

Site:

Site

Search Clear

eCard Templates

Happy Holidays

Happy Holidays!

✎ ✕ 📄

3. The **eCard templates** frame displays the templates that meet your criteria.

Note: In *eCard templates*, you can preview an eCard template to verify it is the one to copy. Under **eCard templates**, click the image of the template. A larger version of the image appears. To return to *eCard templates*, click the larger image.

4. Under **eCard templates**, click **Copy** under the template to edit. The Add eCard template screen appears.

Add eCard template

Properties Design

Display Options
When users browse eCards, the cards are sorted by name. The preview image will be resized according to the eCard part's thumbnail settings. The caption will be seen as a tooltip when hovering over this eCard Template's thumbnail.

Name: Happy Holidays! *

Preview image: <File is located on the se... *

Caption: Happy holidays!

Email Options
Whenever an eCard is sent, a specific subject line can be offered using the option below.

Email subject line: Happy holidays from us!

eCard Categories
Select one or more categories to which this eCard Template will belong.

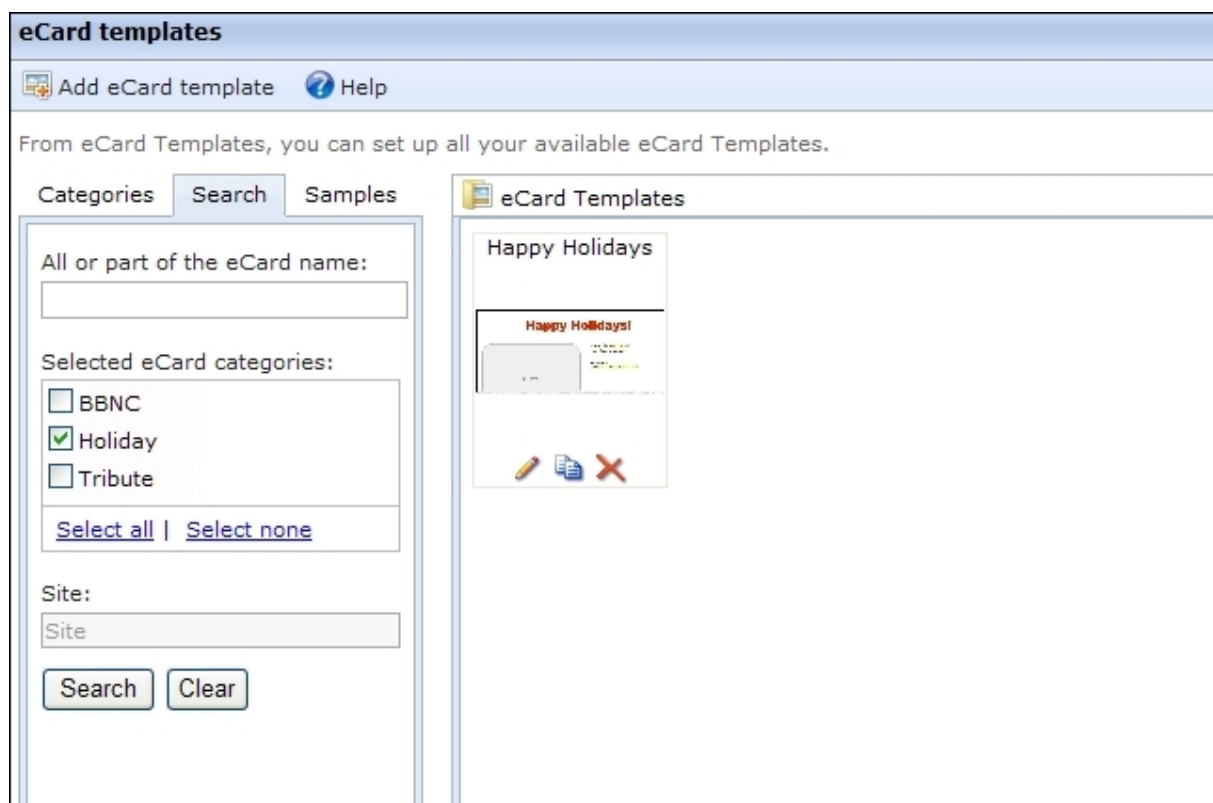
Categories: ☒ Holiday

And/or a new category:

5. In the **Name** field, the program adds "Copy of" to the name of the original eCard template. Enter a unique name so users can identify the new eCard template.
6. Edit the information as required to design the new eCard template. For information about how to design an eCard template, see [Design an eCard template on page 74](#).
7. Click **Save**. You return to *eCard templates*.

➤ Delete an eCard template

1. From *Email*, click **eCard templates**. *eCard templates* appears.
2. Browse the Categories tab or click the Search tab to find the eCard template to delete.



3. The **eCard templates** frame displays the templates that meet your criteria.

Note: In *eCard templates*, you can preview an eCard template to verify it is the one to delete. Under **eCard templates**, click the image of the template. A larger version of the image appears. To return to *eCard templates*, click the larger image.

4. Under **eCard templates**, click **Delete** under the eCard template to delete. A confirmation message appears to verify the deletion of the template.
5. Click **OK**. You return to *eCard templates*. In the **eCard templates** frame, the template no longer appears.

➤ Design an eCard email message

When you design an eCard email message, you can use merge fields to create a message that contains the content of the eCard or a link to a web page that contains the content. For information about the merge fields that appear for an eCard email message, see [eCard Email Message Merge Fields on page 86](#).

1. From the Edit Part screen, click **eCard email**. The eCard Email screen appears.

Name: Everybody Donation form Email *

From Address: sample.text@sampletext.com * From Name: Test *

More Options...

Formatting Insert View

Paste Cut Copy HTML Code

Font family Font size

B I U ABC A ab x² x₂ ABC

Find Format Remove formatting

Dear <Recipient's name> ,

<Sender's name> has sent you an eCard! To view your eCard, click below.

<Begin hyperlink to eCard> Open eCard now! <End hyperlink to eCard>

Have a great day!

Path:

Note: The screen shown above is the eCard Email screen for a Donation Form part. Depending on the part type you use, your eCard Email screen may differ slightly. Some eCard Email screens contain default text and merge fields. You can use the default text provided or enter different text.

2. Enter a name for the email and an email address and name to include in the **From** field of the email message.

Note: When you create an eCard template in *eCard templates*, you enter the subject line to appear for all eCard email messages that use the template.

3. To receive responses from recipients at a different email address than the one you use to send the message, click **More Options** and enter the address in the **Reply Address** field.
4. Under **Notifications are to be sent to the following addresses**, select **Failures** to receive failure messages when email messages are not delivered. In the field beside the checkbox, enter an email address to receive failure messages.

Note: Failures are email addresses that do not receive the acknowledgement email. Failures can also be called non-delivery receipts, bouncebacks, UnDeliverables, or Delivery Status Notifications (DSN). For information about how the program handles failures, see [Bounced Email Management on page 42](#).

5. In the box, enter the content to appear in the eCard email message. To format the email content's appearance and layout, use the HTML editor.

To have information appear in the message that is specific for each eCard, sender, or recipient, click **Merge fields** on the Insert tab in the toolbar and select the merge fields to include in the message. For information about the merge fields that appear for an eCard email message, see [eCard Email Message Merge Fields on page 86](#).

6. Click **Save**. You return to the Edit Part screen.

7. Click **Save**. You return to *Parts*.

Sample eCard Templates

On the Samples tab, *eCard templates* provides sample eCard templates. You cannot edit these sample templates or select them for use on an eCard part or a Donation Form part. However, to save time, you can copy a sample template to design a new eCard template.

➤ Copy a sample template to design a new eCard template

1. From *Email*, click **eCard templates**. *eCard templates* appears.
2. Select the Samples tab.

Note: In *eCard templates*, you can preview an eCard template to verify it is the one to copy. Under **eCard templates**, click the image of the template. A larger version of the image appears. To return to *eCard templates*, click the larger image.

3. Under **eCard templates**, click **Copy** under the sample template to edit. The Add eCard Template screen appears.

Add eCard template

Properties Design

Display Options
When users browse eCards, the cards are sorted by name. The preview image will be resized according to the eCard part's thumbnail settings. The caption will be seen as a tooltip when hovering over this eCard Template's thumbnail.

Name: Happy Holidays! *

Preview image: <File is located on the se... *

Caption: Happy holidays!

Email Options
Whenever an eCard is sent, a specific subject line can be offered using the option below.

Email subject line: Happy holidays from us!

eCard Categories
Select one or more categories to which this eCard Template will belong.

Categories: ☒ Holiday

And/or a new category:

4. In the **Name** field, the program adds "Copy of" to the name of the sample eCard template. Enter a unique name so users can identify the new eCard template.

5. Edit the information as required to design the new eCard template. For information about how to design an eCard template, see [Design an eCard template on page 74](#).
6. Click **Save**. You return to *eCard templates*.

eCard Template Merge Fields

When you design an eCard template, use merge fields to allow website users to personalize eCards based on the template with information specific to the sender or recipient. You can also use merge fields to create additional content that appears when a website user views a preview of the eCard or when the recipient views the sent eCard. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar of the Design tab. To expand the list, click the plus sign next to **eCard fields**. In addition to merge fields for donations and tributes, the merge fields specific to eCard templates appear.

- **Recipient's name** – To display the name of the person that the website user sends the eCard to, add this merge field. For example, add "To: <Recipient's name>."
- **Recipient's email address** – To display the email address that the website user sends the eCard to, add this merge field. For example, add "To: <Recipient's name> (<Recipient's email address>)."
- **Sender's name** – To display the name of the website user who sends the eCard, add this merge field. For example, add "From: <Sender's name>."
- **Sender's email address** – To display the email address of the website user who sends the eCard, add this merge field. For example, add "From: <Sender's name> (<Sender's email address>)."
- **Sender's personal message** – To allow the sender to enter a personal message for the recipients, add this merge field. For example, add "Message: <Sender's personal message>."

Note: To allow website users to send a personal message with eCards based on the template, you must include the **<Sender's personal message>** merge field. If you do not use this merge field on a template, the option to add a personal message does not appear when the user personalizes the eCard on your website.

- **Begin content for eCard preview** and **End content for eCard preview** – To include content to appear on the preview of an eCard that uses the template before the program sends it, use these merge fields to indicate when the preview content begins and ends.

Tip: If you require a donation for a user to send an eCard, you can use the **Begin content for eCard preview** and **End content for eCard preview** merge fields to display a watermark you create over the preview of the eCard. A watermark helps prevent users who attempt to avoid the donation and instead copy and send the free preview of the eCard.

- **Begin content for sent eCard** and **End content for sent eCard** – To include content to appear on each eCard sent that uses the template, use these merge fields to indicate when the sent content begins and ends. For example, you can include content about your organization and an invitation for the recipient to visit your website.

Tip: When you create content to appear for the recipient, you can include other merge fields within the **Begin content for sent eCard** and **End content for sent eCard** merge fields. For example, you can add "Do you want to send an eCard to <Sender's name>?" with a link to your website's eCard part page.

eCard Email Message Merge Fields

When you design an eCard email message, use merge fields to customize the message sent with information specific to the eCard and its sender and recipient. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar of the eCard Email screen. The merge fields specific to eCard email messages appear.

- **eCard name** – When you create an eCard template, you enter a name for the template. To display this name in the body of the message, use this merge field.
- **eCard content** – To display the personalized content of the eCard template in the body of the message, use this merge field.
- **eCard caption** – When you create an eCard template, you enter a caption for the template. To display this caption in the body of the message, use this merge field.
- **Email subject** – When you create an eCard template, you enter a subject line to appear for the email message that delivers the eCard. To include this subject in the body of the message, use this merge field.
- **Begin hyperlink to eCard** and **End hyperlink to eCard** – When the program sends an eCard, it generates a web page that contains its personalized content. To include a hyperlink to this web page in the body of the message, use these merge fields to indicate when the hyperlink begins and ends. The recipient can click this hyperlink to visit your website and view the content of the eCard.
- **Sender's name** – To display the name of the website user who sends the eCard in the body of the message, add this merge field. For example, add "You have received an eCard from <Sender's name>."
- **Sender's email address** – To display the email address of the website user who sends the eCard in the body of the message, add this merge field. For example, add "You have received an eCard from <Sender's name> (<Sender's email address>)."
- **Sender's personal message** – To display the personal message the sender enters for the recipients in the body of the message, add this merge field. For example, add "Message from <Sender's name>: <Sender's personal message>."
- **Recipient's name** – To display the name of the person that the website user sends the eCard to, add this merge field. For example, add "Hello, <Recipient's name>."
- **Recipient's email address** – To display the email address that the website user sends the eCard to, add this merge field. For example, add "Hello <Recipient's name> (<Recipient's email address>)."

Scheduled Emails

In Scheduled emails, you can create and schedule emails to send to selected constituents at specific times. For example, to send each alumnus an email during the month of the individual's birthday, you must first create a birthday email template. For information about how to create an email template, see [Templates on page 14](#). Then you create a list based on an offline constituent query that contains constituents who are alumni and whose date of birth equals this month. For information about how to

create a list, see [Lists on page 65](#). The program merges the information in the list you selected with the merge fields in the birthday template. After you have a list and an email template, you can create a schedule for the process.

When you schedule an email, you determine how often you distribute the message. For messages that should be sent on a specific day, such as a particular holiday, you may want to schedule the email process to occur early in the morning so constituents receive the email on the same day. If you scheduled the process to run late at night, constituents may not receive the message until the following day.

Note: The time and time zone you select for the email process determine when the program sends the email job to the queue. It does not indicate when the messages will be sent. This is determined by the number of messages that have to be processed, the number of merge fields, and the number of existing email jobs that must process before your job can begin. For information about email status, see [Email Delivery Status on page 43](#).

The email process runs on the scheduled day and time you select. If the list contains no records for the selected schedule, the program removes the scheduled job from the queue. If at any time you need to suspend a scheduled email, you can disable the schedule.

➤ Create a scheduled email

1. From *Email*, click **Scheduled emails**. *Scheduled emails* appears.
2. Click **New scheduled email**. The New scheduled email screen appears.

Create schedule

Schedule name: * Specify the name of the schedule.

☐ Enable schedule Enable this scheduled email to send at next occurrence.

Select template

Current template: * Not selected Select an email template to generate emails.

Select list

Selected list(s): * Not selected Select the email list(s) that will receive this email.

3. In **Schedule name**, enter a name for the scheduled email. This name appears in the **Scheduled emails** grid, so you can easily identify the process.
4. Click **Enable schedule** if you want the program to start the process at the time you select after you click **Save**. To create a scheduled email but not use the process immediately, do not select this checkbox.

Tip: You can use **Enable schedule** to temporarily suspend a scheduled email.

- To select an email template for the process, click **Select template**. The template determines the merge fields and content that appear in the email message, as well as the recipient lists in the Select Target Lists screen.

For information about how to create an email template, see [Templates on page 14](#).

- Click **Select list** to choose the list of recipients for this email.

Note: Only lists that match the template's data source type, such as a constituent query or an imported list, appear in the **Select list** field. For information about how to specify a data source for a template, see [Templates on page 14](#).

From the Select Target Lists screen, choose the list to use and click **Add** to move the entry to **Selected lists**. Click **OK** to return to the scheduled email screen.

- Under **Create recurrence**, select a schedule for this email.

Create recurrence

Frequency of email: *

☒ Daily
☐ Weekly
☐ Monthly
☐ Annually

☒ Every: day(s)
☐ Every weekday

Duration of scheduled email

Start date: *

Specify the start date of the recurrence.

End date:

Specify the end date of the recurrence.

Scheduled email run-time

Time to queue: : AM

Specify the time of day to queue this email.

Time zone: *

Specify the email schedule's targeted time zone.

- Select a frequency of "Daily," "Weekly," "Monthly," or "Annually." You can then further define the schedule frequency. For example, if you select "Daily" you can choose to have the email process run on only weekdays.
- In the **Duration of scheduled email** fields, define when to send the scheduled email. For example, to send weekly updates about an upcoming event, you can select a start date several months before the event and an end date for the day of the event.

Tip: To always run the email process at the scheduled time, do not enter an end date.

10. In the **Scheduled email run-time** fields, enter the time for the program to queue the email job. Specify whether the time is a.m. or p.m.
11. In the **Time zone** field, select the time zone to use for the recurrence.

Note: The time and time zone you select determine when the program adds the scheduled email job to the queue. This time may be different than the time the email is sent to recipients.

12. Click **Save**. You return to *Scheduled emails*.

To view details about scheduled email jobs that have been processed, you can create an Email Activity Report. This report includes the date sent, the number of emails in the selected email job, the number of opened and bounced emails, and the number of page visits generated by each email.

For information about how to create an Email Activity Report, see the *Parts Guide*.