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Overview

This article walks through the steps to create and send a mass email campaign. It also touches on how to track the email statistics after it goes out.

Tip: Watch <u>this video</u> to learn how to **schedule mass emails** and watch <u>this video</u> to learn how to **create templates**, upload images, etc.

<u>Steps</u>

Prior to sending a mass email you **need** to make sure you have a **from/reply** email address configured in your database. <u>This video</u> & <u>this article</u> show how to accomplish this task.



1) Navigate to the Contacts (Voters/Donors) list.



2) Build and run your <u>search query</u>. In my example I searched for everyone who had a primary or alternate **email** (that was **subscribed**), and donated <u>last year but not this year</u>, which produced **990** records.

KNOWLEDGE BASE <u>www.trailblz.com/kb</u>





Build and run your search query for the list of contacts you want to target with an eblast.

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3) Click **File > Communications > Create Mass Email..** *This requires appropriate <u>security clearance</u>.*

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4) Give the email campaign a descriptive name, select your preferences (I typically leave the default settings as is), and click [OK].



1. Create a name for the email campaign. (This is not the subject line).

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Exclude/C	Confirm For those addresses to which 50 or more mess last registered open: Bypass sending the e-mail message. Send the e-mail message, but include a request for receive e-mail. (Further e-mail will await a respons <u>Click here for a detailed explanation of this feature</u> Remove Duplicates (not recommended for personalized)	sages have been sent since the or confirmation of interest in continuing to se to this request.)	(Typically I leave the default settings as is if I'm going to be sending the email soon. That way you'll get the actual numbe of recipients that the eblast is going to go to).



5) If you chose to send to everyone in the 'current list' you'll get a popup notification that displays the results. Click **[OK]** to proceed. In my example the total recipient count grew to 999.



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	<u>1282</u>	<u>Chisholm</u>	<u>Robin</u>	206 18th Ave W	proceed:	0.00
	<u>1283</u>	<u>Chisholm</u>	<u>Rocky</u>	206 18th Ave V	Exclude/Confirm	0.00
	<u>1289</u>	<u>Choi</u>	<u>Kee</u>	2715 Autumnwood Ln	In For the OK Cancel	0.00
	<u>1296</u>	<u>Christeson</u>	<u>Joellyn</u>	5121 690th Ave	last re	0.00
	<u>1299</u>	<u>Christianson</u>	<u>Ben</u>	8860 Maplebrook Ct N	t N Bypass sending the e-mail message.	0.00
	<u>1309</u>	Christopher	Terry	7587 Highway 169	Send the e-mail message, but include a request for confirmation of interest in continuing to	0.00
	<u>1315</u>	Chung	Joung	1712 Riverside Dr	receive e-mail. (Further e-mail will await a response to this request.)	0.00
	<u>1317</u>	<u>Cicha</u>	<u>Rebecca</u>	39480 180th St SW	Click here for a dynailed explanation of this feature.	0.00
	<u>1326</u>	Clapp	Andrew	475 Ferndale Rd N	Remote Duplicates (not recommended for neroconstituted empile)	0.00
	<u>1328</u>	<u>Clark</u>	Emily	3958 9th Ave	W nemos pupiletes (not recommended for personalized emails)	0.00
	<u>1338</u>	<u>Clark</u>	<u>Teresa</u>	122 Peninsula Rd	These counts should match pretty closely	0.00
	<u>1347</u>	<u>Clausen</u>	Anthony	3149 Mcknight Rd N	N OK OCAncel	0.00
	<u>1373</u>	<u>Coggins</u>	<u>Ryan</u>	910 Elliot Ave S	אסררי-נדכ (בבט) דטדינים אווא סטכ וואן איז איז געריינדט אווא איז איז געריינדט אווא איז געריינדט אווא איז איז געריינדט איז איז געריינדט געריינדט איז געריינדט געריינדט געריינדט געריינדט געריינדט געריינדט געריינדט געריינדט געריינדט געריגעריגערינדט געריגערינדט געריגערינדט געריגערינדט געריגערינדט געריגערינדט געריגעריגערינדט געריגעריגערינדט געריגעריגעריגעריגעריגעריגעריגעריגעריגערי	,0.00
				If	If they don't you fi meed to send in a request 8	_

that we enable your emails for you (this is

common if you've more imported a list



6) The email composer will open at this point. You can insert your own template, start with one of our standard templates, or start from scratch.



File 🝷 Edit 🝷 🛞 🗞 Saved Copies 🖪 Results 🛛 📑 🛅 🔚 2016 Appeal - LYBUNT (People Who Gave Last Year But Not This Year)
From: jkristenson@trailblz.com
To: 999 Recipient(s)
Subject:
📝 Edit 🔚 Save 🗟 Insert Template 🔚 Save Template Priority Normal 👻 🗐 Forward to Friend 📄 Unable-to-Read Link
Insert merge field 👻 🔲 Filter Content
豫 Source 🖸 🖶 🔏 🛅 📩 📩 🏷 < 🏔 🎎 🖏 💞 -
B I ∐ abc x, x² 🤄 ☷ ☶ ୭୨ 😗 票 프 프 = 🕅 🕫 ଊィ 🛞 📯 🔚 🎟 띂 🙂 Ω ⊣ ⊣
Styles - Normal - Font - Size - A - 2 -
Design your email by:
- Starting from scratch
The setting in our scratch
- Inserting a template you ve already saved
- Insert one of the Standard Trail Blazer temlates
hady n
Text Version
Rin Normal Text Version



7) Create a catchy **subject line** and click **[Test]**. *My finished example is below*.







8) Choose your '<u>testers</u>' and click **[OK]**.

Test E-Mail Campaign 🛛 🔊							
The included individuals below will receive a test e-mail message. Do you wish to proceed?							
Rec	ipients	to Receive Test	Message				
		Last Name	First Name	MI	E-mail Address		
►		Admin	Admin		support@trailblz.com		
	V	Kristenson	Joel	A	jkristenson@trailblz.com		
		_ <u>1</u>					
					2 OK OK Cancel		

9) Click [Close] after the test goes out.





10) **Review** your email message for any **errors/rendering issues**. It's important to **test thoroughly** on different **device sizes** and **email clients** (i.e. Gmail, Outlook, Yahoo, etc.). *My final test is below, viewed in MS Outlook (desktop version)*.



Review your test emails thoroughly on different devices and email clients.





11) Once you're satisfied with the test results, click [Send] and either send the email right away or select a time to schedule it.



File 🝷 Edit 🝷 🛞 🚱 Saved Copies 🖪 Results 📑 in 🖶 🖢 2016 Appeal - LYBUNT (People Who Gave Last Year But Not This Year)
From: jkristenson@trailblz.com
To: 999 Recipient(s)
Subject: Thanks for donating last year! Please consider giving again this year!
📝 Edit 🔚 Save 🎭 Insert Template 🔚 Save Template Priority Normal 👻 🗔 Forward to Friend 🔄 Unable-to-Read Link
«FirstName» • 🔽 Filter Content
③ Source ゐ 吕 本 ⓑ ⓑ ⓑ ⓑ ○ 爲 號 ○ ♡.
$B T U abc x_x x^2 \land \phi = = \phi = \phi = = = \phi $
Styles \mathbf{x} Format \mathbf{x} Format \mathbf{x} Size \mathbf{x} $\mathbf{A}_{\mathbf{a}} = \mathbf{a} \mathbf{b} \mathbf{c}$
Schedule E-mail Campaign
Your message will be sent to 999 recipients.
Send now 2. Select your preference.
Send at scheduled time
UTC-06:00) Central Time (US Canada)
Dear
This is our second email to you, we really nobe you can support
our cause!!
 You've already helped built 20 new schools in the developing
countries we work in.
We've added on 5 new employees and 20 new volunteers since
our last eblast.
v body senter table thedy to tell table thedy to tell table thedy to tell
body center table toody tr to table toody tr to table toody tr to table toody tr to
Normal rext version



12) After the eblast goes out you can track the **overall statistics** in the **Email Campaigns** list.

Settings Help	2	
Application Menu «	🗫 Search 🆕 Reset 💠 New 🔚 🥅 🗁 😸 🏕 🏠 🔚 File 🕶 Edit 🚽 🔞 Email Campaigns	Π
BEG		
Tasks	Favorites General SQL	
 Dashboard Quantization Calendar/Tasks 		
 b and the second second	Date Created:	
Section 2 Campaigns S	Date Started:	
S Templates 1 S Tracked Links	Export Brownat - Statistics - click [Search] periodically to refresh these.	
Advanced Merging	Email Campaigns [4 records found]	
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	Image: Weight of the second secon	
	▼ 95 12/17/2010 Demonstration of links ✓ Created ✓ 2 2 2 100.00 0 0 0	
	2 4 0 4 1,004 5 3 60.00 0 0 0	

13) You can also search for **who specifically opened** or **did not** open the campaign in the Contacts (Voters/Donors) list.





The related resources link to a wide variety of articles and videos related to the email tools.





- YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources

Related Resources

Article: Configuring your From and Reply Email Address Settings



Article: How to Send an Email Campaign to People who've Received Specific Email Campaigns(s) in the Past
Article: How to Add Email Attachments (i.e. PDF's, Word Docs, Spreadsheets, etc.) to an Email Template or Mass Email Campaign
Article: How to Delete Unsent Email Campaigns, Test Email Campaigns, and Email Templates
Article: Editing Tracked Links for Mass Email Campaigns – Creating Names for those Missing a Name
Article: How to Access and Use the Standard Trail Blazer Email Templates as a Starting Point for Template Creation and Mass E-Mail Campaigns
Article: Setup a User to Receive Test Emails, How to Send Out Tests of a Mass Email Campaign, and How to Test an Individual Email Template
Article: Adding SPF / DKIM Key to your domain's Txt Record Greatly Improve Your Email Open Rates! (*requires access to your web host)
Article: How to Import a Google Web Font into your Trail Blazer Email Template
Article: How to Create Custom Email Responders for Specific Events – New 2016 Feature Upgrade
Article: How to Use the Event Contribution Total Merge-Field in a Mass Email to Thank Attendees for the Total Amount they Gave at a Specific
<u>Event – 2016 Upgrade</u>
Article: How to Create a Custom Thank-You Auto-Responder Email with Merge Fields for your Online Donation Form
Article: Running an Import of Contact Data from Excel into your Database – Basic Overview
Article: How to Create a Hyperlink around a Screenshot of your Video and Link to the Video from your Trail Blazer Email Template
Article: How to Create a Hyperlink around a Screenshot of your PDF Newsletter and Hyperlink it to the PDF Document
Article: How to Upload Documents to your System Gallery such as PDF's, Spreadsheets, Audio Clips, Image Files, Etc.
Article: How to Cancel a Mass Email Campaign as it's Going Out & How to Reschedule a Queued Email Campaign
Article: How to Create Trackable Links in your Email Campaigns, and How to Analyze those Statistics after the Eblast Goes Out
Article: Email Opens and How Trail Blazer is Managing This Process
Article: Querying by Email
Video: Thank you's using mass email
Video: Eblasts Configure email settings before mass emailing
Video: Eblasts –Setting people up to receive test (draft) emails
Video: <u>Scheduled Emails</u>
Video: Eblasts Create and Send Eblasts – Includes Image Management
Video: Donation Auto Responders with Merge Fields



Trail Blazer Live Support

- **O Phone:** 1-866-909-8700
- Email: <u>support@trailblz.com</u>
- Facebook: https://www.facebook.com/pages/Trail-Blazer-Software/64872951180
- **Twitter:** <u>https://twitter.com/trailblazersoft</u>

* As a policy we require that you have taken our intro training class before calling or emailing our live support team.

<u>*Click here*</u> to view our calendar for upcoming classes and events. Feel free to sign up other members on your team for the same training.

* After registering you'll receive a confirmation email with the instructions for how to log into the <u>GoToMeeting</u> session where we host our live interactive trainings.

* This service *is* included in your contract.