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Overview

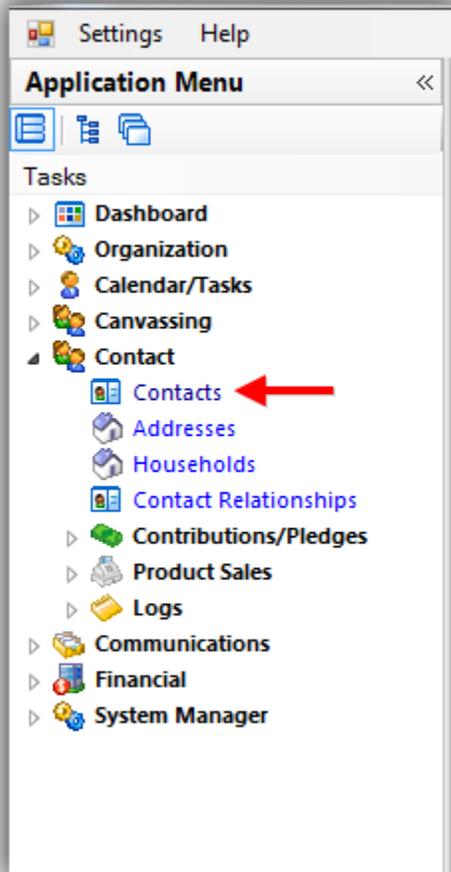
This article walks through the steps to **create** and **send a mass email** campaign. It also touches on how to **track** the **email statistics** after it goes out.

 **Tip:** Watch [this video](#) to learn how to **schedule mass emails** and watch [this video](#) to learn how to **create templates**, upload images, etc.

Steps

Prior to sending a mass email you **need** to make sure you have a **from/reply** email address configured in your database. [This video](#) & [this article](#) show how to accomplish this task.

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



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

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

The screenshot shows the TrailBlazer software interface. At the top, there is a 'Search' button highlighted with a red box. Below it, various filter tabs are visible, including 'Address Type', 'Subscribed', 'Unsubscribed', and 'Bounced'. A red arrow points to the 'Search' button, and another red arrow points to the 'Address Type' filter. Below the filters, there is a table of contacts with columns for ID, Last Name, First Name, Street, City, State, Zip Code, Home Phone, Email, Contribution Total 2015, and Contribution Total 2016. A red arrow points to the table with the word 'results' written next to it.

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Contribution Total 2015	Contribution Total 2016
2	Aagard	Martha	4629 York Ave S		Minneapolis	MN	55410	(612) 920-9217	Martha@Aagard.com	180.00	.00
6	Aamot	Barbara	13451 Mcginty Rd E		Minnetonka	MN	55305	(952) 933-8423	Barbara@Aamot.com	150.00	.00
7	Aanenson	Pamela	3896 White Bear Ave		White Bear Lake	MN	55110	(651) 426-9611	Pamela@Aanenson.com	250.00	.00
31	Adam	Ibrahim	5300 France Ave N		Brooklyn Center	CT	06500	(763) 533-8023	Ibrahim@Adam.com	120.00	.00
32	Adam	Mounira	5300 France Ave N		Brooklyn Center	CT	06500	(763) 533-8023	Mounira@Adam.com	650.00	.00
42	Adelmann	Karen	641 6th St		Albany	MN	56307	(320) 845-7332	Karen@Adelmann.com	70.00	.00
43	Adelmann	Robert	11020 280th St E		Webster	MN	55088	(952) 440-7739	Robert@Adelmann.com	80.00	.00
53	Ahlbrecht	Kristy	2624 Olive Ln		Sauk Rapids	MN	56379	(320) 240-7931	Kristy@Ahlbrecht.com	310.00	.00
65	Ailie	Scott	21629 County Hwy 6		Detroit Lakes	MN	56501	(218) 847-7435	Scott@Ailie.com	190.00	.00
66	Ailie	Thomas	21629 County Hwy 6		Detroit Lakes	MN	56501	(218) 847-7435	Thomas@Ailie.com	360.00	.00
67	Akemann	James	1021 Westwood Dr		Faribault	MN	55021	(507) 334-8226	James@Akemann.com	20.00	.00
68	Akemann	Victoria	1021 Westwood Dr		Faribault	MN	55021	(507) 334-8226	Victoria@Akemann.com	170.00	.00
97	Alossaimi	Badr	20625 Texas Ave		Prior Lake	MN	55372	(952) 440-7138	Badr@Alossaimi.com	150.00	.00
121	Anderson	Anthony	226 Minnesota St S		Shakopee	MN	55379	(952) 445-7335	Anthony@Anderson.com	40.00	.00
133	Anderson	Caryl	941 272nd Ln NW		Isanti	MN	55040	(763) 444-7337	Caryl@Anderson.com	470.00	.00
142	Anderson	Donna	10628 Maryland Ave S		Bloomington	MN	55438	(952) 941-7432	Donna@Anderson.com	700.00	.00
144	Anderson	Douglas	13143 180th Ln NW		Elk River	MN	55330	(763) 441-7433	Douglas@Anderson.com	320.00	.00
157	Anderson	Jessica	6721 116 1/2 Cir N		Champlin	MN	55316	(763) 422-9717	Jessica@Anderson.com	150.00	.00
170	Anderson	Katie	20779 Gemini Trl		Lakeville	MN	55044	(763) 742-7933	Katie@Anderson.com	160.00	.00
179	Anderson	Marie	21347 60th Ave		Milaca	MN	56353	(763) 444-7539	Marie@Anderson.com	260.00	.00
186	Anderson	Megan	1873 One Pine Estate Rd		Ely	MN	55731	(218) 343-7732	Megan@Anderson.com	160.00	.00
194	Anderson	Norma	1822 Meadowvale Rd NW	Apt 122	Elk River	MN	55330	(763) 441-7136	Norma@Anderson.com	80.00	.00
207	Anderson	Steven	508 Lyon St W	Apt 2	Marshall	CT	06500	(507) 530-8823	Steven@Anderson.com	40.00	.00

results

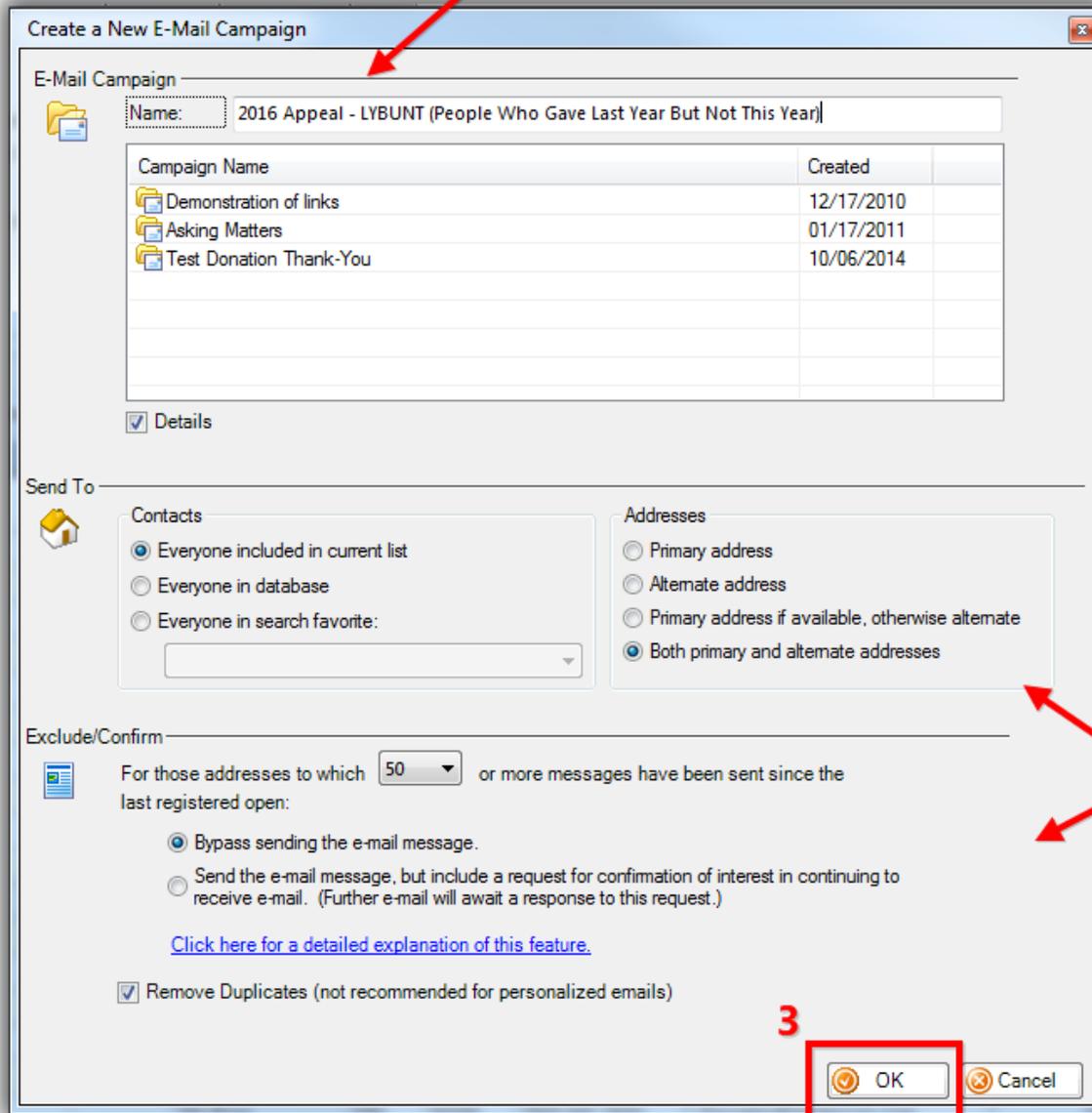
3) Click **File > Communications > Create Mass Email...** This requires appropriate [security clearance](#).

The screenshot shows the TrailBlazer software interface. The 'File' menu is open, and the 'Communications' sub-menu is selected. The 'Create Mass Email...' option is highlighted. A red arrow labeled '1' points to the 'File' menu, and another red arrow labeled '2' points to the 'Create Mass Email...' option. Below the menu, there are various settings panels for address type, subscription status, and unopened messages. At the bottom, a table displays contact records with columns for ID, Last Name, First Name, Street, City, State, Zip Code, Home Phone, Email, and Contribution Totals for 2015 and 2016.

ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Contribution Total 2015	Contribution Total 2016
2	Aagard	Martha	4629 York Ave S		Minneapolis	MN	55410	(612) 920-9217	Martha@Aagard.com	180.00	.00
6	Aamot	Barbara	13451 Mcginty Rd E		Minnetonka	MN	55305	(952) 933-8423	Barbara@Aamot.com	150.00	.00
7	Aanenson	Pamela	3896 White Bear Ave		White Bear Lake	MN	55110	(651) 426-9611	Pamela@Aanenson.com	250.00	.00

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).



Create a New E-Mail Campaign

E-Mail Campaign

Name: 2016 Appeal - LYBUNT (People Who Gave Last Year But Not This Year)

Campaign Name	Created
Demonstration of links	12/17/2010
Asking Matters	01/17/2011
Test Donation Thank-You	10/06/2014

Details

Send To

Contacts

Everyone included in current list

Everyone in database

Everyone in search favorite:

Addresses

Primary address

Alternate address

Primary address if available, otherwise alternate

Both primary and alternate addresses

Exclude/Confirm

For those addresses to which 50 or more messages have been sent since the last registered open:

Bypass sending the e-mail message.

Send the e-mail message, but include a request for confirmation of interest in continuing to receive e-mail. (Further e-mail will await a response to this request.)

[Click here for a detailed explanation of this feature.](#)

Remove Duplicates (not recommended for personalized emails)

3

OK Cancel

2. Select your options.

(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 number 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.*

The screenshot shows the TrailBlazer interface with a contact list and two dialog boxes. A red box highlights '990 records found' in the contact list header. A red arrow points from this box to the 'Warning' dialog box, which contains the text: 'Campaign "2016 Appeal - LYBUNT (People Who Gave Last Year But Not This Year)" will have a target list of 999 recipients. Do you wish to proceed?'. The 'OK' button in the warning dialog is also highlighted with a red box.

Warning

Campaign "2016 Appeal - LYBUNT (People Who Gave Last Year But Not This Year)" will have a target list of 999 recipients. Do you wish to proceed?

OK Cancel

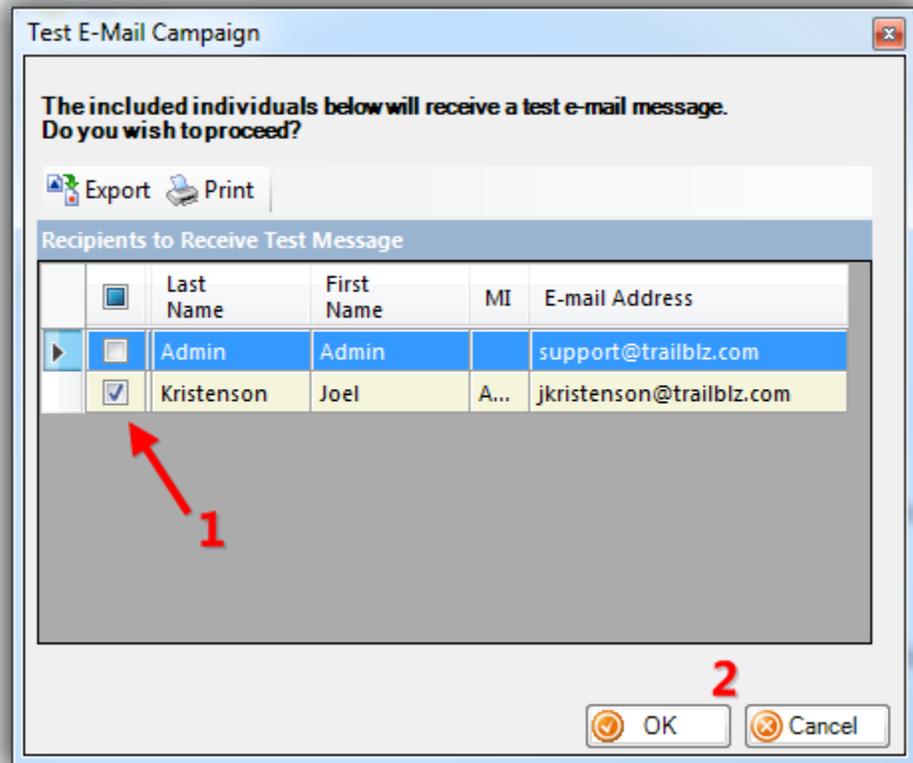
These counts should match pretty closely.

If they don't you'll need to send in a request that we enable your emails for you (this is common if you've mass imported a list)

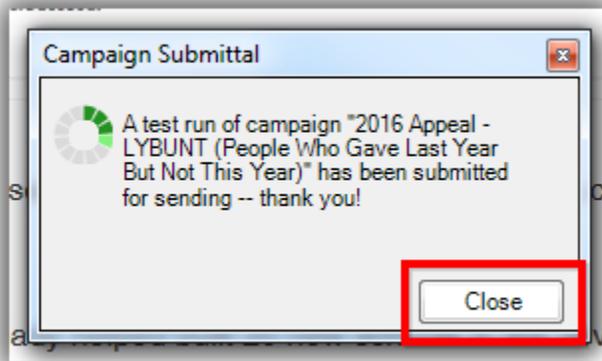
6) The **email composer** will open at this point. You can insert your [own template](#), start with one of our [standard templates](#), or start from scratch.

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

8) Choose your testers and click **[OK]**.

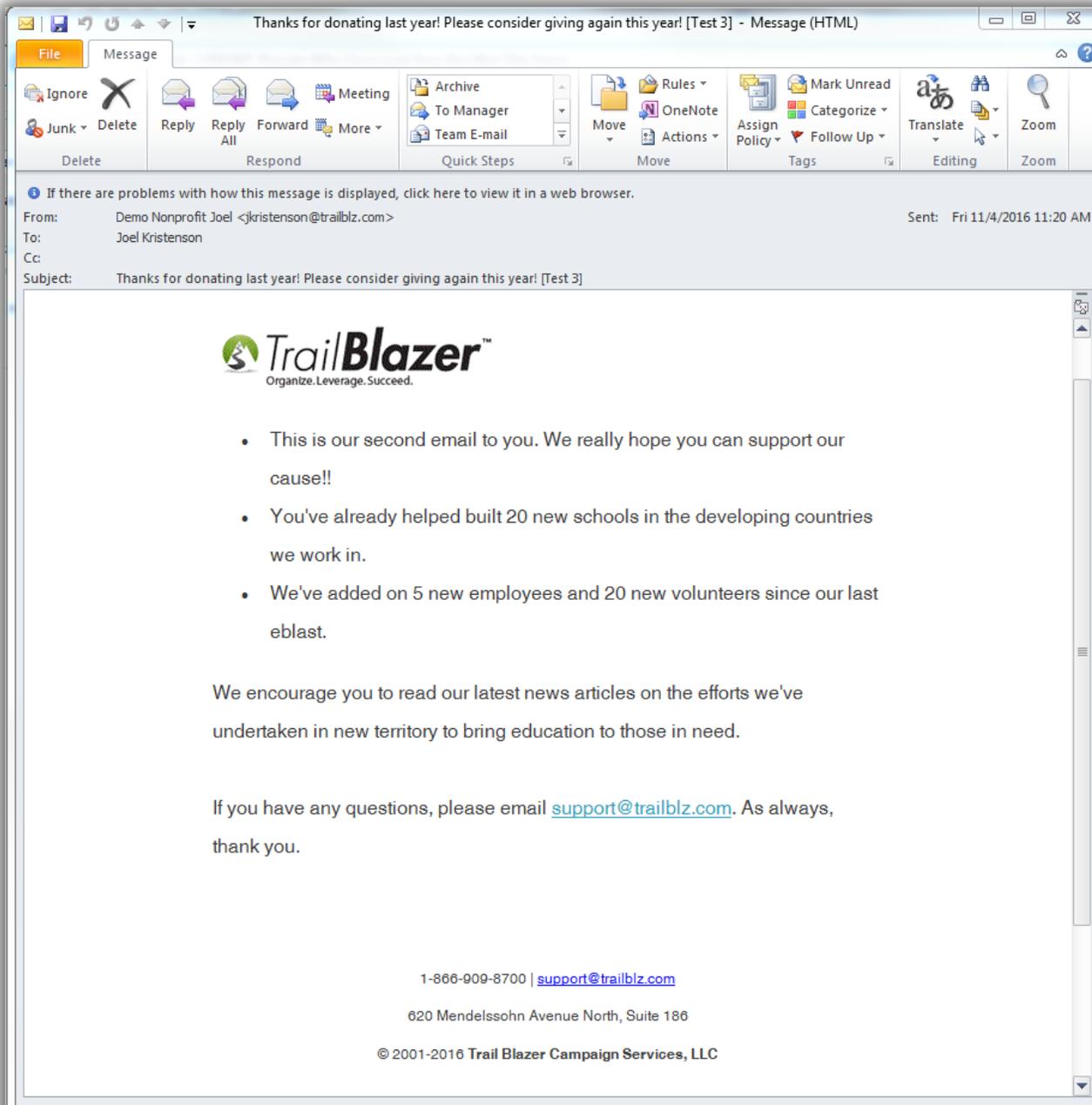


9) Click **[Close]** after the test goes out.

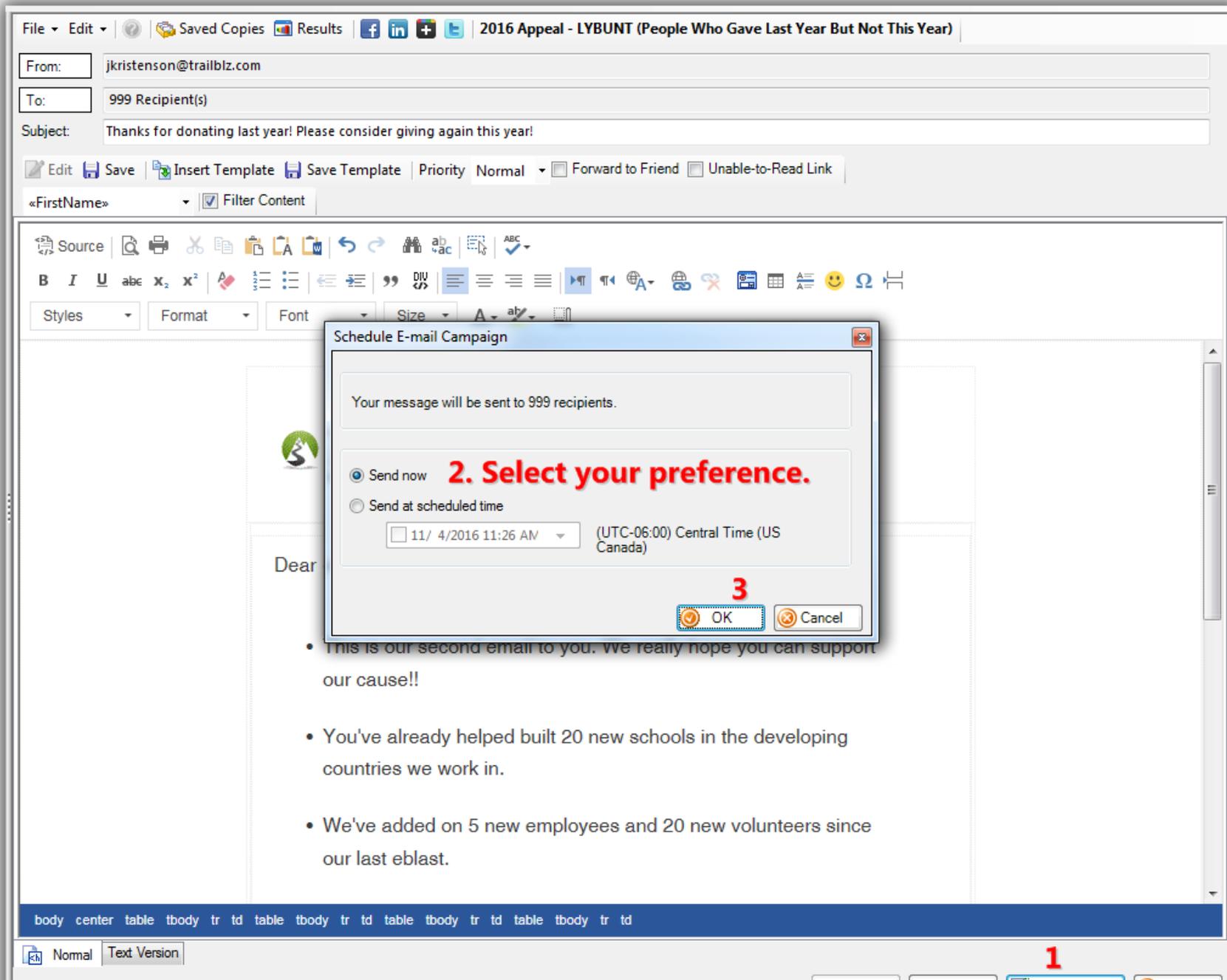


10) **Review** your email message for any **errors/rendering issues**. It's important to **test thoroughly** on different **device sizes** and **email clients** (i.e. Gmail, Outlook, Yahoo, etc.). *My final test is below, viewed in MS Outlook (desktop version).*

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 | 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

Source | Copy Paste Undo Redo | Bold Italic Underline | Styles Format Font Size | OK Cancel

Schedule E-mail Campaign

Your message will be sent to 999 recipients.

2. Select your preference. Send now

Send at scheduled time

11/ 4/2016 11:26 AM (UTC-06:00) Central Time (US Canada)

3

OK Cancel

Dear

- This is our second email to you. We really hope 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.

body center table tbody tr td table tbody tr td table tbody tr td table tbody tr td

Normal Text Version

1

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

The screenshot shows the TrailBlazer application interface. On the left is an 'Application Menu' with a tree view where 'Email Campaigns' is highlighted with a red arrow and the number '1'. The main window has a search bar with a red box around it and the number '2'. Below the search bar are filters for 'Name', 'Date Created', and 'Date Started'. At the bottom, a table displays campaign statistics. A red box highlights the table, and a red text annotation says 'Statistics - click [Search] periodically to refresh these.'

Cam-paign ID	Created Date	Campaign Name	Status	Status	Test	List Built	List Source	Recipients	Sent	Opened	Open Rate %	Tracked Clicks	Bounced	Abuse Complaints	Date/Time Submission Started	Date/Time Submission Completed
231	11/4/2016	2016 Appeal - LYBUNT (People Who Gave Last Year But Not This Year)	Created	Created	<input type="checkbox"/>	<input checked="" type="checkbox"/>	< displayed list >	999	0	0	.00	0	0	0		
168	10/6/2014	Test Donation Thank-You	Created	Created	<input type="checkbox"/>	<input checked="" type="checkbox"/>	< displayed list >	1	1	1	100.00	0	0	0	10/6/2014 2:53 PM	10/6/2014 2:53 PM
98	1/17/2011	Asking Matters	Created	Created	<input type="checkbox"/>	<input checked="" type="checkbox"/>	< displayed list >	2	2	0	.00	0	0	0		
95	12/17/2010	Demonstration of links	Created	Created	<input type="checkbox"/>	<input checked="" type="checkbox"/>	< displayed list >	2	2	2	100.00	0	0	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 screenshot shows the TrailBlazer software interface. On the left is a navigation menu with categories like 'Tasks', 'Organization', 'Calendar/Tasks', 'Canvassing', 'Contact', 'Addresses', 'Households', 'Contact Relationships', 'Contributions/Pledges', 'Product Sales', 'Logs', 'Communications', 'Financial', and 'System Manager'. The 'Contact' category is expanded, and 'Contacts' is selected, indicated by a red arrow labeled '1'. At the top, the 'Search' button is highlighted with a red box and a red arrow labeled '4'. Below the search bar, there are tabs for 'General', 'Address', 'Household', 'Attribute', 'Canvass', 'Relation', 'Contribute', 'Pledge', 'Event', 'Sales', 'Log', 'Admin', and 'SQL'. The 'E-mail Campaigns' section is active, showing a list of campaigns: '[2010/12/17] Demonstration of links', '[2011/01/17] Asking Matters', and '[2014/10/06] Test Donation Thank-You'. The third campaign is selected, indicated by a red arrow labeled '2. Select which campaign(s) to search by.'. To the right, the 'Tracked Links' section is highlighted with a red box and labeled '3. Select additional options.'. It contains a list of links with checkboxes for 'Opened' and 'Not Opened'. Below this, there are buttons for 'Edit', 'Sort', 'Format', 'Wrap', 'Export', 'Print', 'Detail', 'Summary', and 'Pivot'. A status bar shows 'Contacts [27 records found]', highlighted with a red box. Below this is a table of contact records.

results

ID	Title	Last Name	First Name	Street	City	State	Zip Code	Home Phone	Bus Phone	Email
9221	Mr.	Panger	Mark	600 5th Ave S	Hopkins	MN	55343	(952) 938-0248		mpanger@gmail.com
9222		Jacobwith	Lori	600 5th Ave S	Hopkins	MN	55343	(952) 949-2105		lori@lorijacobwith.com
9251		Gainey	Carla	7896 Main St	Hopkins	MN	55555			carla@carla.com
9264		Contribs	No	6726 Jefferson St NE	Fridley	CT	06500		(763) 552-7284	jan@familypathways.org
9278	Mr.	Doran	Brian	875 Main St E	Rochester	NY	14605		(585) 244-8640	mister_43@yahoo.com
9288		Cope	Tom	545 2nd St SW	Corvallis	OR	97333		(541) 758-2646	tcope@communityservices.us
9359		Gregerson	Nadine	3340 Carnation Ave N	Brooklyn Park	MN	55443	(612) 325-2295		nadine.gregerson@gmail.com
9384		Withers	Thomas	Na	Na	NB	11111			thomas.withers@tamucc.edu
9392		Maki	Susan	549 Montrose Ln	St Paul	MN	55116	(651) 111-1111		smaki@iimn.org
9416		Ellefson	Julie	2167 Quant Ave N	Stillwater	CT	06500	(651) 747-7908	(555) 555-5555	julieE@inspire-hope.org
9426		Kirkland	Debbie	Na	Na	MA	11111			debbiekirkland@brandonfoun...
9449		LeMaster	Jea	100 Main St E	Highland	CA	92346			jea@lemaster.com

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



Trail Blazer

- 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 Event – 2016 Upgrade](#)
- 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:** [Scheduled Emails](#)
- Video:** [Eblasts Create and Send Eblasts – Includes Image Management](#)
- Video:** [Donation Auto Responders with Merge Fields](#)

Trail Blazer Live Support

☎ **Phone:** 1-866-909-8700

✉ **Email:** support@trailblz.com

f **Facebook:** <https://www.facebook.com/pages/Trail-Blazer-Software/64872951180>

t **Twitter:** <https://twitter.com/trailblazersoft>

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

[Click here](#) 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 [GoToMeeting](#) session where we host our live interactive trainings.*

** This service is included in your contract.*