Author: Kristenson, Joel
Last Updated: 2016-11-04

Overview

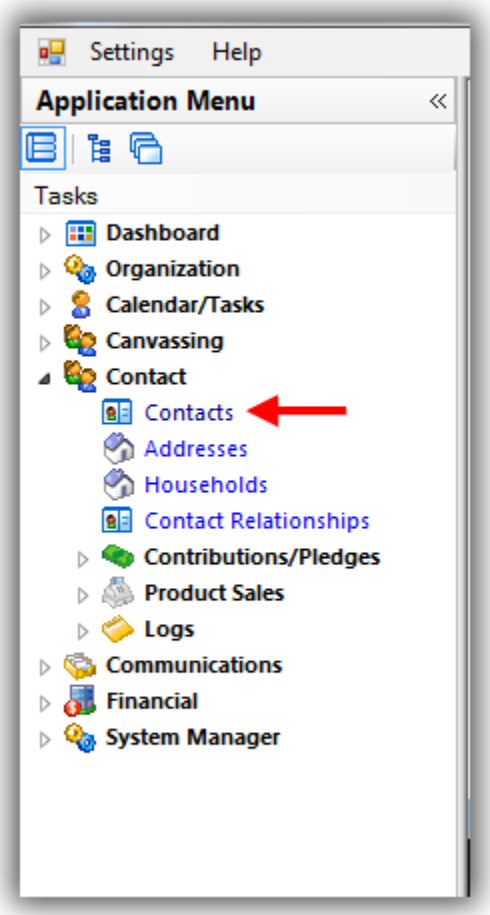
This article walks through the steps to **create** and **send** a **mass email** campaign. It also touches on how to **track** the **email statistics** after it goes out.

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

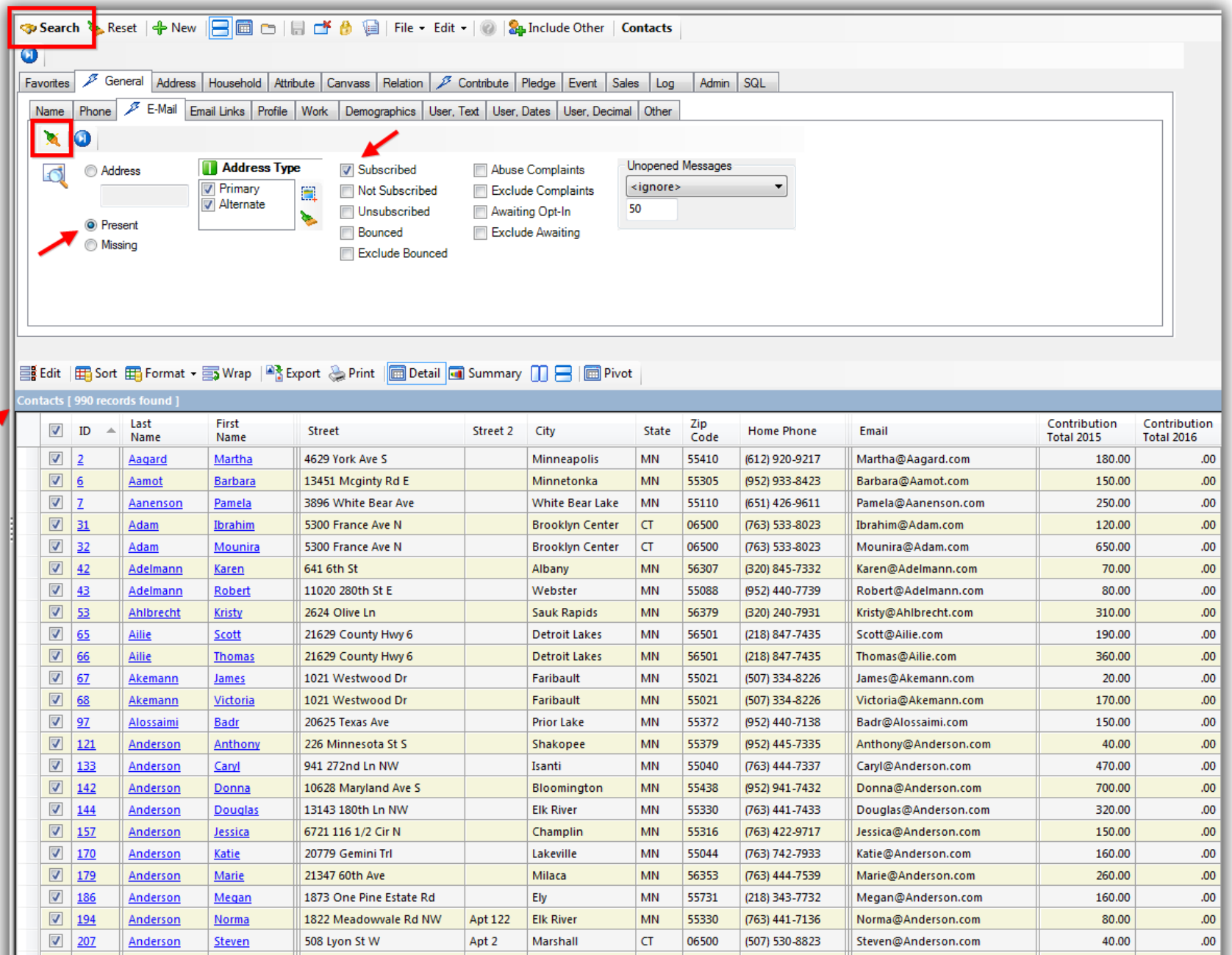
Prior to sending a mass email you **need** to make sure you have a **from/reply** email address configured in your database. This video & this article show how to accomplish this task.

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.*

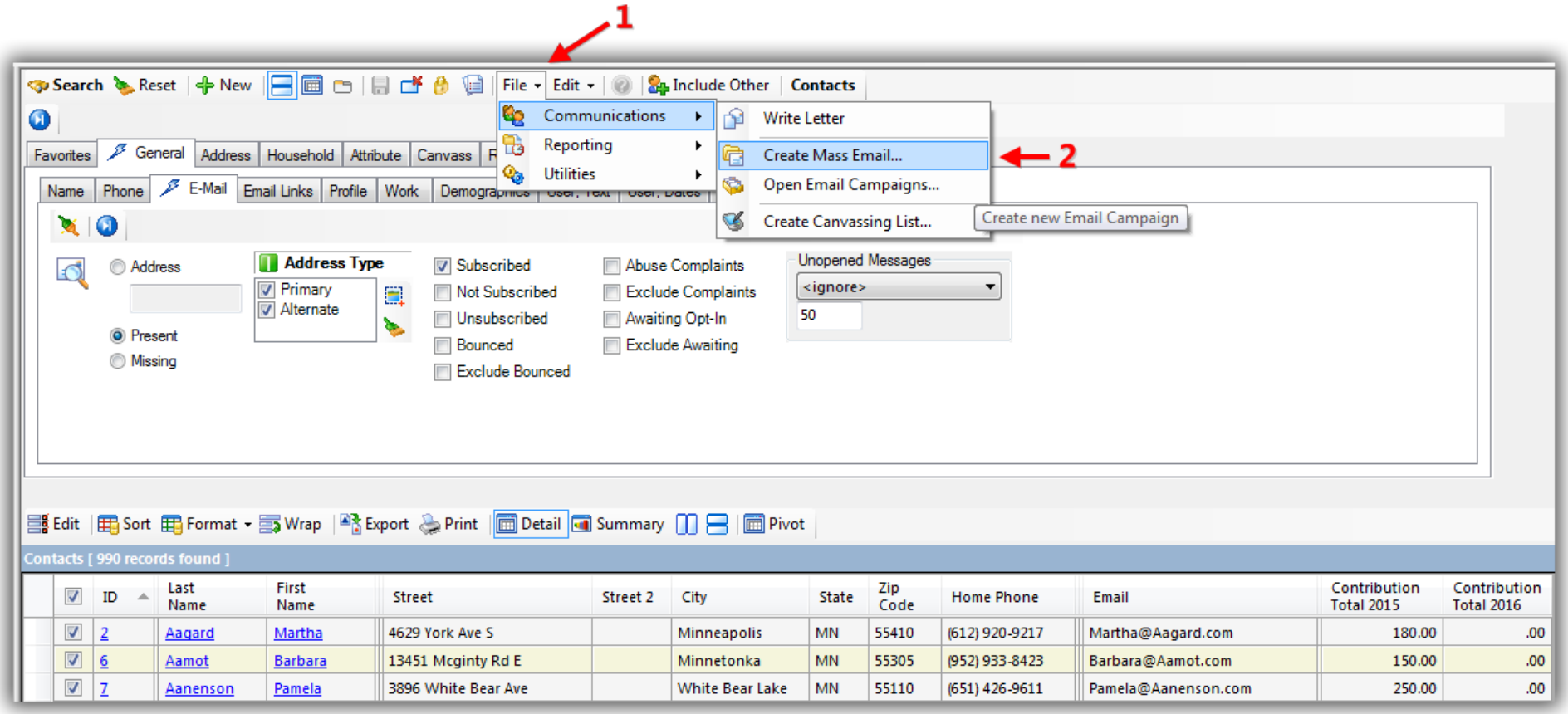
Build and run your search query for the list of contacts you want to target with an eblast.



results

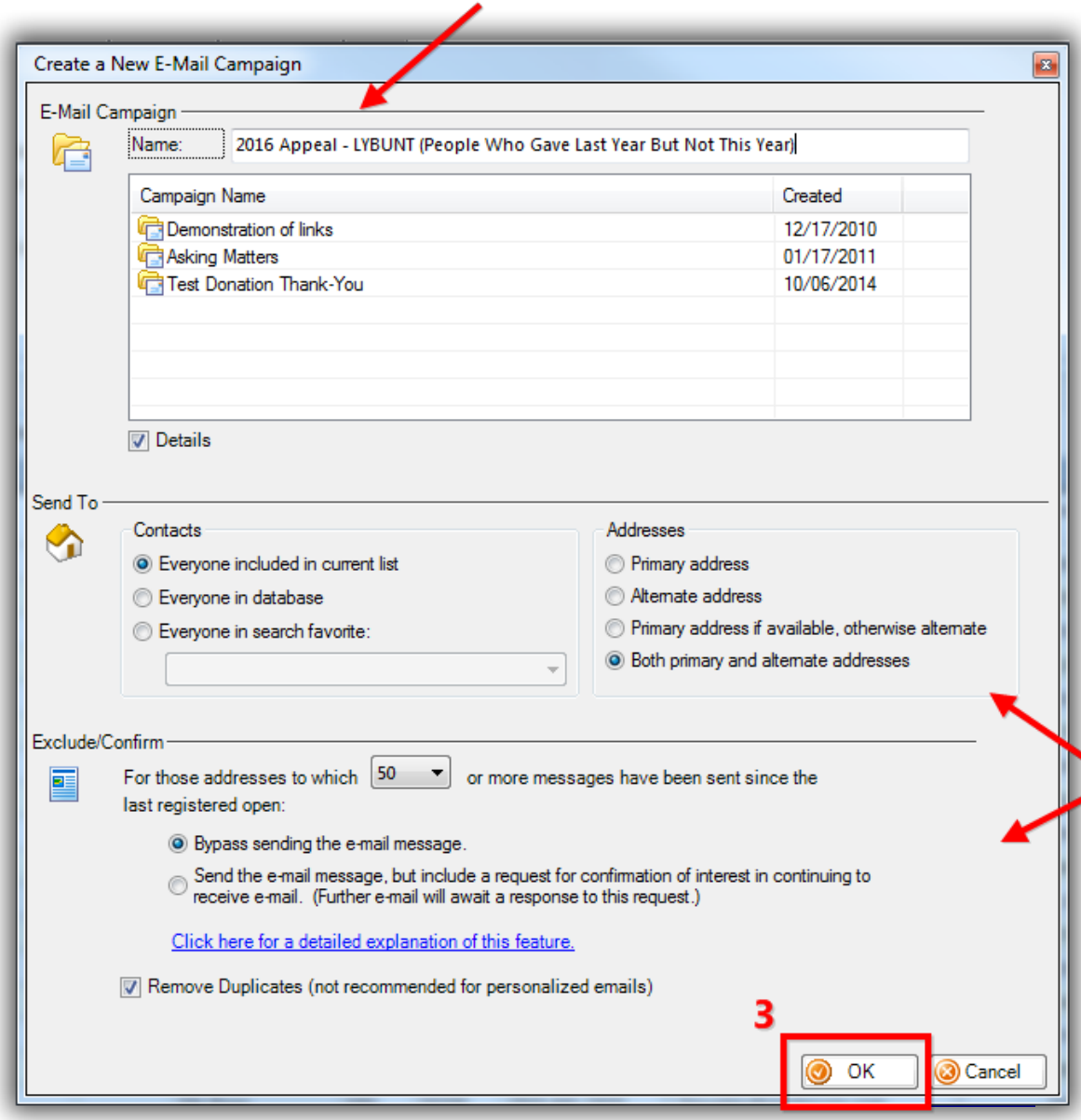
ID	Last Name	First Name	Street	Street 2	City	State	Zip Code	Home Phone	Email	Contribution Total 2015	Contribution Total 2016
2	Aagard	Martha	4629 York Ave S		Minneapolis	MN	55410	(612) 920-9217	Martha@Aagard.com	180.00	.00
6	Aamot	Barbara	13451 Mcginty Rd E		Minnetonka	MN	55305	(952) 933-8423	Barbara@Aamot.com	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

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



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

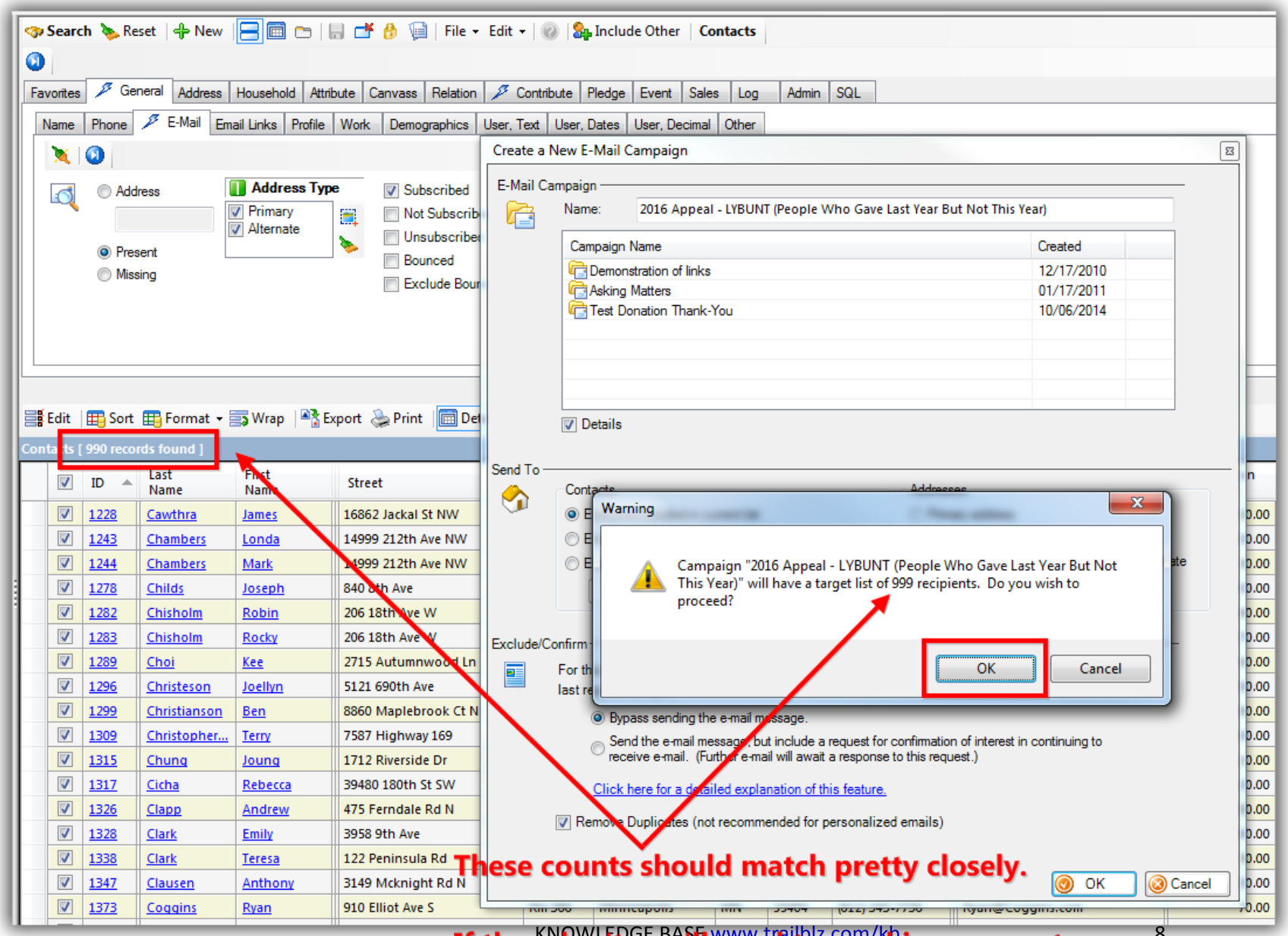
1. Create a name for the email campaign. (This is not the subject line).



2. Select your options.

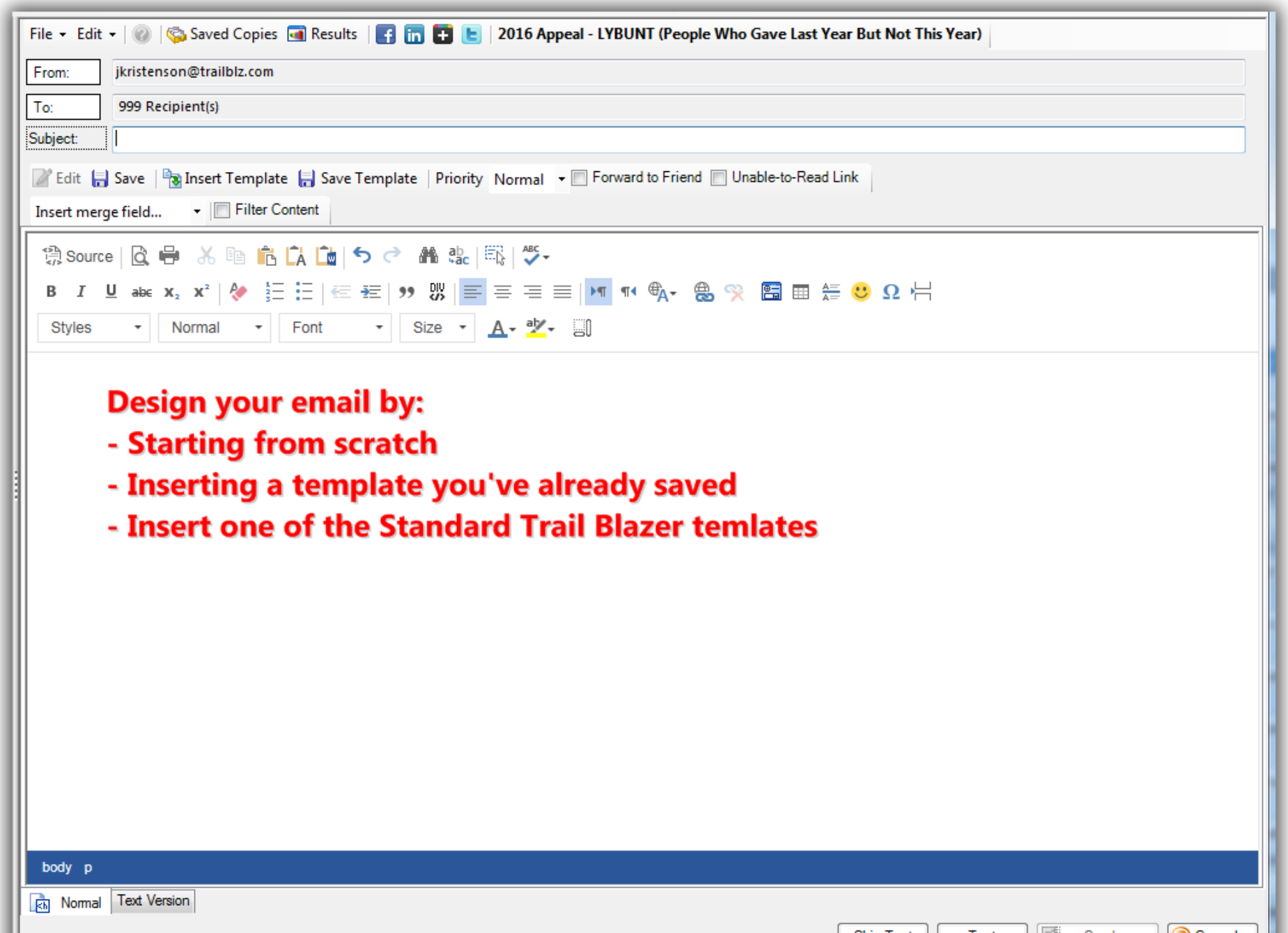
(Typically I leave the default settings as is if I'm going to be sending the email soon. That way you'll get the actual number of recipients that the eblast is going to go to).

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.*

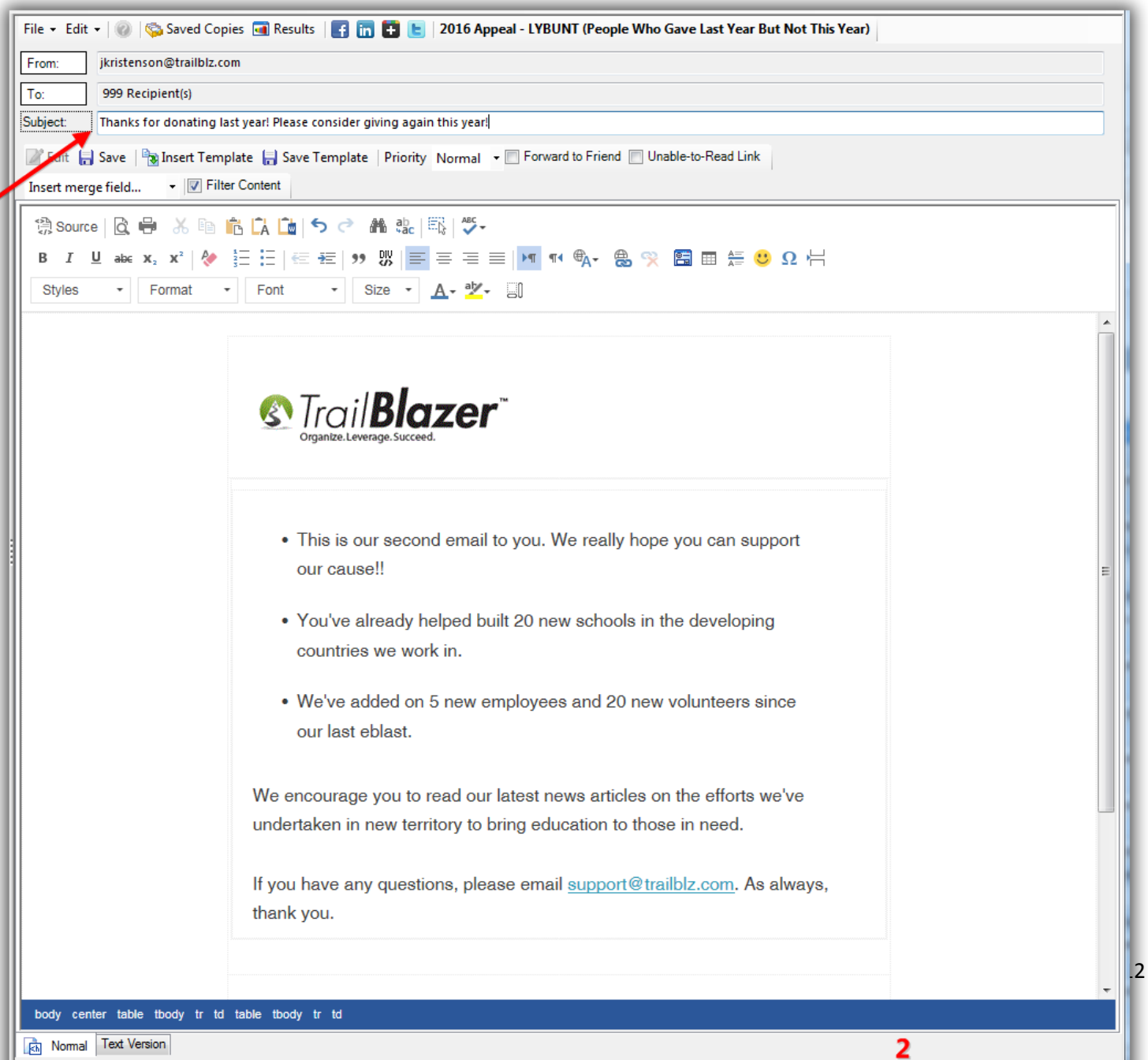


If they don't you'll need to send in a request that we enable your emails for you (this is common if you've mass imported a list

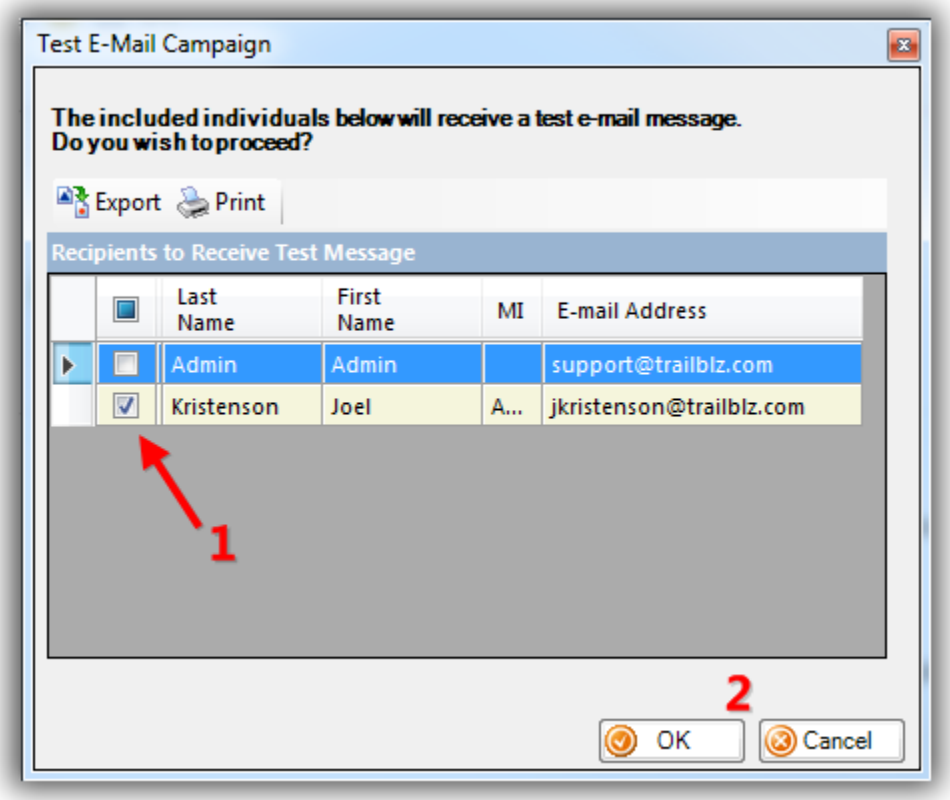
6) The **email composer** will open at this point. You can insert your own template, start with one of our standard templates, or start from scratch.


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
Source
Styles
Normal
Font
Size
Design your email by:
- Starting from scratch
- Inserting a template you've already saved
- Insert one of the Standard Trail Blazer temlates
body p
Normal
Text Version

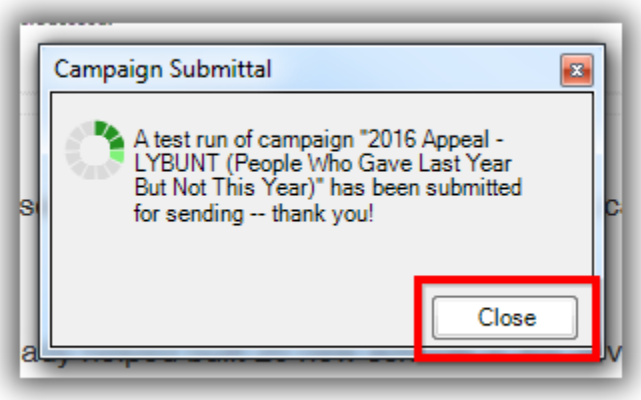
7) Create a catchy **subject line** and click **[Test]**. *My finished example is below.*


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
Insert merge field... Filter Content
Source
Styles Format Font Size
TrailBlazer™
Organize. Leverage. Succeed.
• 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.
We encourage you to read our latest news articles on the efforts we've undertaken in new territory to bring education to those in need.
If you have any questions, please email support@trailblz.com. As always, thank you.
body center table tbody tr td table tbody tr td
Normal Text Version
1
2

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

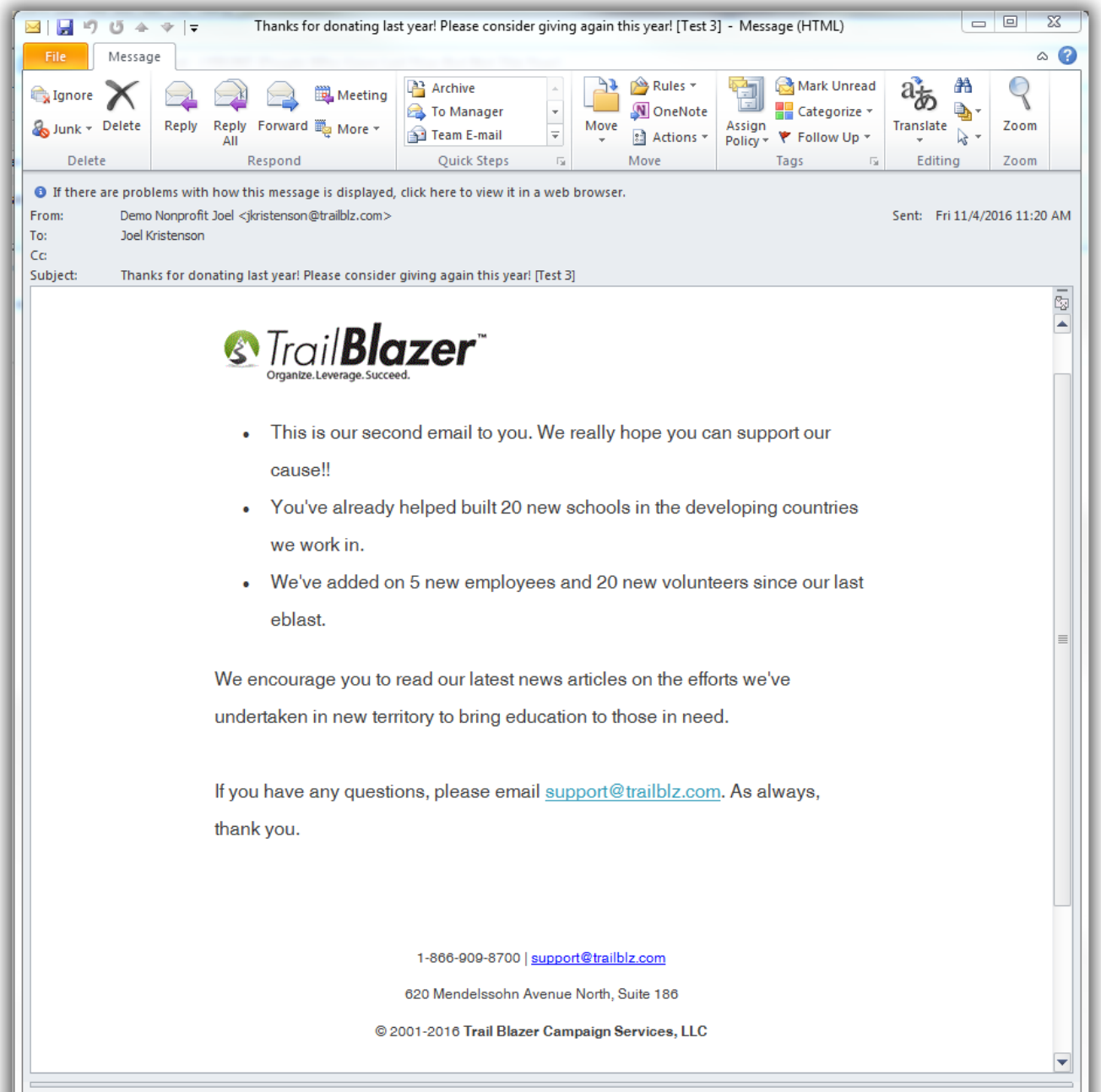


9) Click **[Close]** after the test goes out.



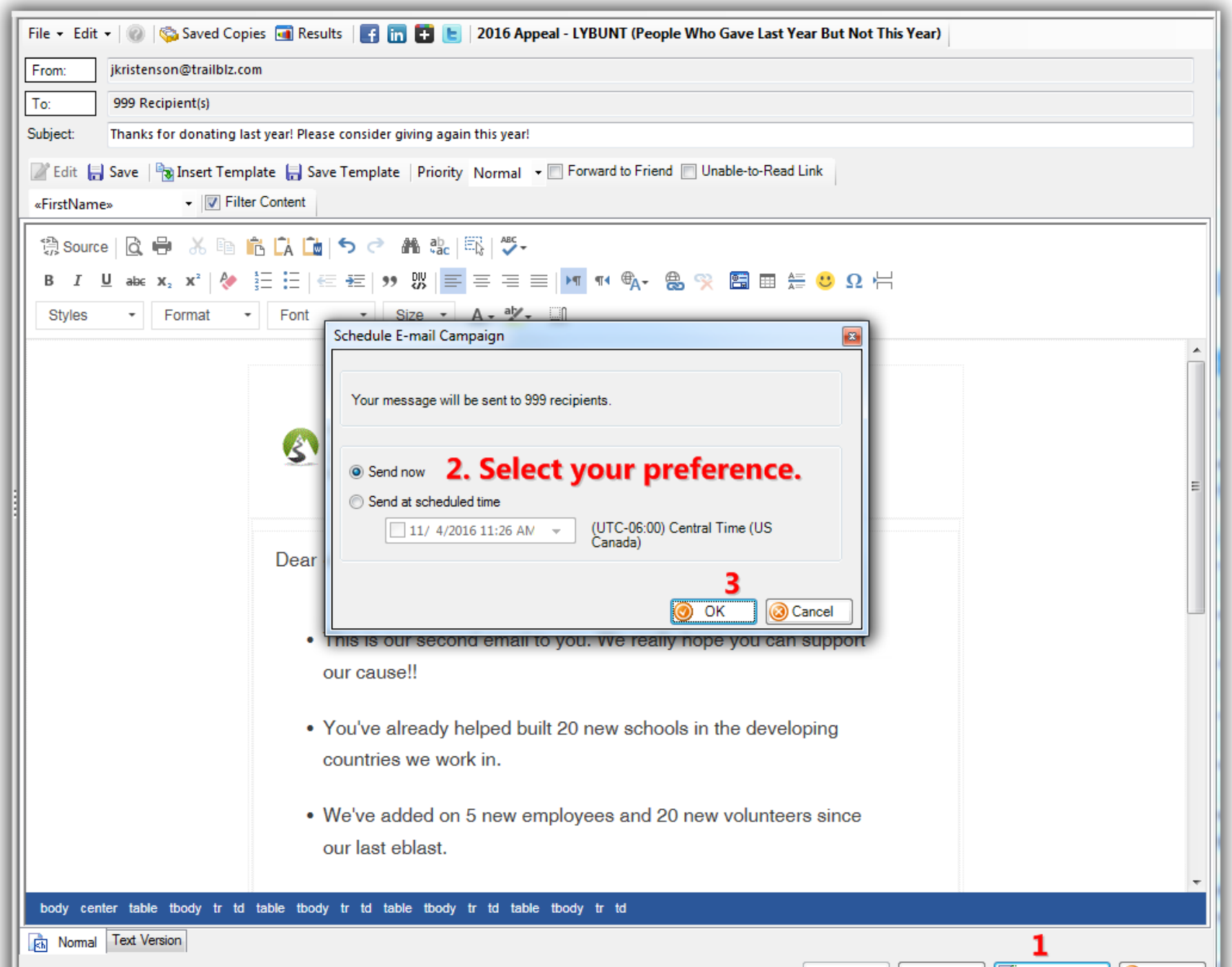
10) **Review** your email message for any **errors/rendering issues**. It's important to **test thoroughly** on different **device sizes** and **email clients** (i.e. Gmail, Outlook, Yahoo, etc.). *My final test is below, viewed in MS Outlook (desktop version).*

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

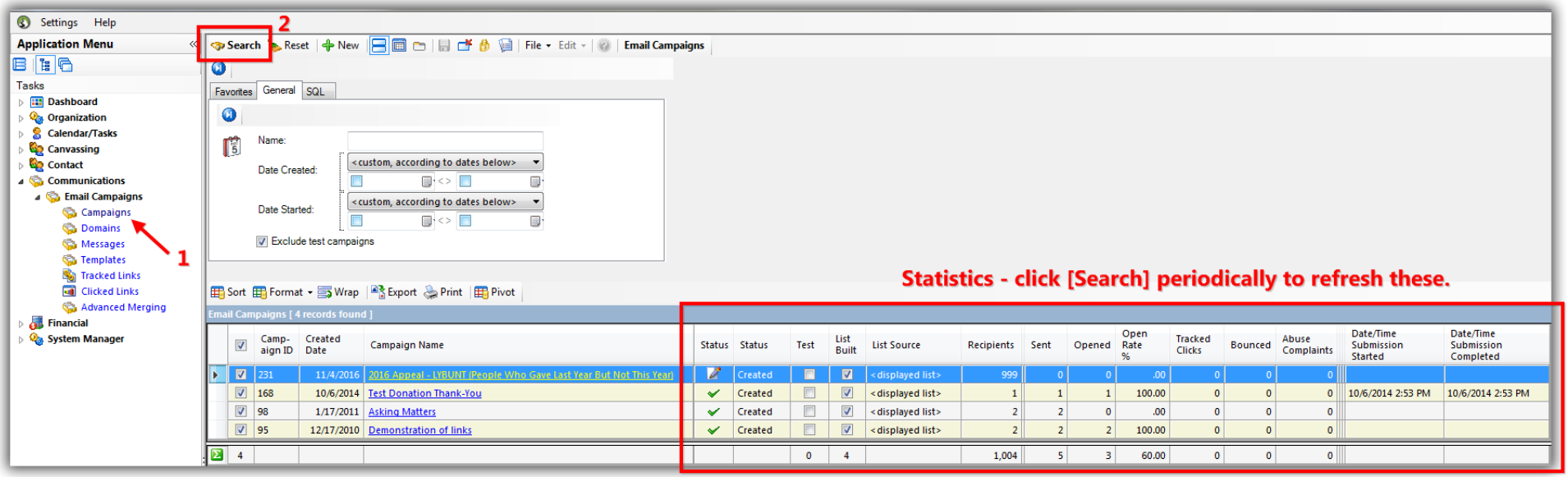


11) Once you're satisfied with the test results, click **[Send]** and either send the email right away or select a time to schedule it.

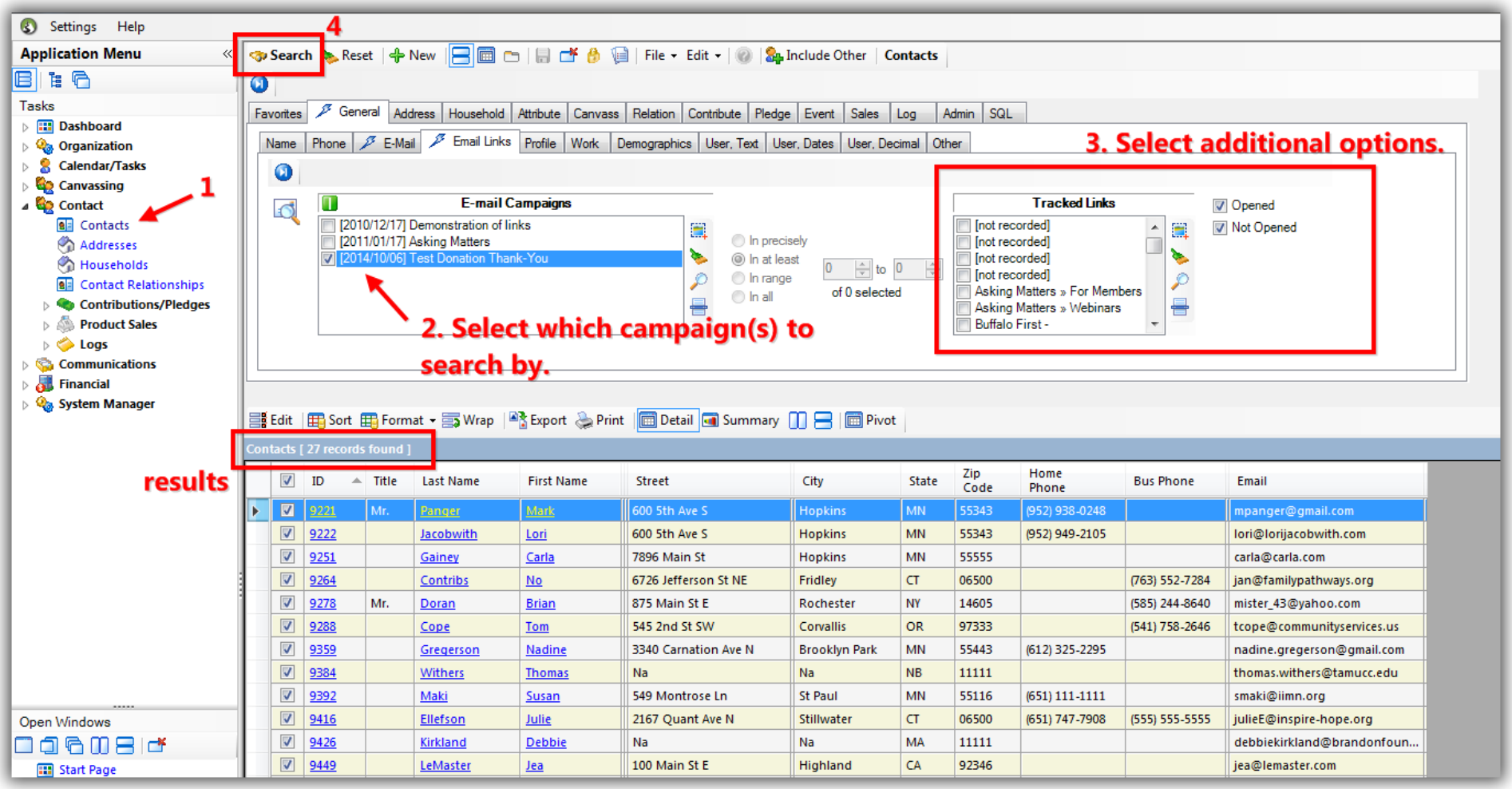
How to Send a Mass Email Campaign & Track the Results



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



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.

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