

Author: Kristenson, Joel Last Updated: 2016-09-28

Overview

This article walks through three things: how to setup a user (*that you've already created*) with the ability to **receive mass email drafts**, how to **test a mass email**, and how to **test an individual email template**.

Tip: Use the **Ctrl+F** hot key to jump to different sections of this article (example: "#1", "#2" or "Related Resources".

<u>Outline</u>



- #1 Setup a User to Receive Test Emails
- #2 Send Out a Test Email from a Mass Email Campaign
- **#3** Send Out a Test of an Individual Email Template to an Individual Contact (Anyone in the Database with an Email Address, Not Necessarily a User)
- #4 Related Resources

#1 – Setup a User to Receive Test Emails

1) Query for the user and open their record. *I used my own record for this example.*



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Query for your list of users and open the user you want to setup as a 'tester' for your mass email campaigns.

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	<u>12796</u>	Senor	Kristenson	<u>Joel</u>	9110 Golden Valley Rd	Apt 10	Golden Valley	MN	55427	(218) 442-1919	(866) 909-8700	(218) 370-1064	jkristenson@trailblz.com	Cargill
2 1														

2) Navigate to Admin > Attributes > Expand the security attribute tree > Check the box for 'Receive Mass Email Drafts > Click [Save].



4

File - Title: First I Middl Last I Prior Nickr Conta	Edit - X	Image: Senor Joel Anders Kristenson Senor Pepé Individual				n [12796] No Př Email jkristens	Son@traill	blz.com	Home Address 9110 Golden Valley Kd Apt 10 Beware of cats (street 3 merge field) Golden Valley, MN 55427 218-442-1919 Work Address No Address		
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3) Keep the user's record open, navigate to General > Contact, and verify that they have an email and the box for 'Enabled' is checked.



	Senor 👻		Home Address
First Name	Joel		Apt 10 Reware of cate (street 3 merge field)
Middle Name	Anders		Golden Valley, MN 55427
Last Name/Suffix	Kristenson	•	
Prior Last Name			ikristenson@trailblz.com
Nickname	Senor Pepé		
Contact Type:	Individual	-	No Address
eneral Household Address Contact	Gallery Attribute Poll Profile Work User	Relation Contribute	Pledge Event Logs Sales Admin
Telephone			Internet
Home Phone:	(218) 442-1919	<u> </u>	E-mail Address jkristenson@trailblz.com
Alt Phone:	(546) 568-9789		Note: Irail Blazer work email address.
Alt Phone 2:	(654) 871-2345		Received permission to include in mass email communications
Cell Phone:	(218) 370-1064	<u> </u>	Unsubscribed Bounced
Work Phone:	(866) 909-8700	r Campaign Services, LL	LC V Enabled Abuse complaint received
Work Ph Direct:	(654) 889-7456	<u> </u>	Imported do-not-mail
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	for 'enab	led' is	Web Site http://www.trailblz.com



4) [Save and Close] their record when finished. If everything is configured correctly this user will show up in the list of eligible 'testers' the next time you send out a mass email campaign.

#2 – Send Out a Test Email from a Mass Email Campaign

Build and run your <u>search query</u> and queue up your <u>mass email campaign</u>. In this example I sent a targeted email to everyone in Minnesota <u>who</u> <u>gave last year but didn't give this year</u>, which produced 989 records.



Settings Help Application Menu \ll 🤝 Search 🍆 Reset | 🕂 New 🔚 🧰 😁 | 🔚 🜁 😚 🦬 | File 🗸 Edit 🗸 🎯 Subscription Include Other Contacts BIE P SQL 🎨 Communications 🚺 🗙 | 🖶 | 🔃 | 🐘 📉 | 🔤 | 🖶 | 🛞 | Write Letter Tasks Reporting Favorites 🎾 General Address Household Attribute Canvass F ю Create Mass Email... Dashboard Utilities 0 Name Phone 🏸 E-Mail Email Links Profile Work Demographie Upen Email Campaigns 🔌 Organization Create new Email Campaign Calendar/Tasks 3 Create Canvassing List... 🔪 I 🙆 Sanvassing Canvassing Unopened Messages 🚺 Address Type Subscribed Abuse Complaints ⊿ Q Contact Address 0 Primary <ignore> Contacts • Not Subscribed Exclude Complaints Alternate Addresses 50 Unsubscribed Awaiting Opt-In Households Present Bounced Exclude Awaiting Contact Relationships Missing Exclude Bounced Contributions/Pledges Product Sales logs 🍅 Communications 🚮 Financial 🍇 System Manager 📑 Edit | 🌐 Sort 🖽 Format 🗕 🚎 Wrap | 🐴 Export 🚕 Print | 🥅 Detail 词 Summary 👖 🚍 | 🕅 Pivot Last Street First Zip 1 ID Street City State Home Phone Email Name Name 2 Code \checkmark 4629 York Ave S Martha@Aagard.com V <u>6</u> Aamot Barbara 13451 Mcginty Rd E Minnetonka MN 55305 (952) 933-8423 Barbara@Aamot.com 7 3896 White Bear Ave White Bear Lake 55110 (651) 426-9611 Pamela@Aanenson.com Aanenson Pamela MN 1 Open Windows 31 Adam Ibrahim 5300 France Ave N Brooklyn Center CT 06500 (763) 533-8023 Ibrahim@Adam.com 1 32 Adam Mounira 5300 France Ave N Brooklyn Center СТ 06500 (763) 533-8023 Mounira@Adam.com 📰 Start Page V <u>42</u> 641 6th St Albany MN 56307 (320) 845-7332 Karen@Adelmann.com Adelmann Karen Contacts 1 43 Adelmann Robert 11020 280th St E Webster MN 55088 (952) 440-7739 Robert@Adelmann.com 1 53 Ahlbrecht <u>Kristy</u> 2624 Olive Ln Sauk Rapids MN 56379 (320) 240-7931 Kristy@Ahlbrecht.com **V** 65 21629 County Hwy 6 Detroit Lakes 56501 (218) 847-7435 Scott@Ailie.com Ailie Scott MN 1 <u>66</u> 21629 County Hwy 6 Detroit Lakes MN 56501 (218) 847-7435 Thomas@Ailie.com <u>Ailie</u> Thomas 1 67 1021 Westwood Dr (507) 334-8226 Akemann Faribault MN 55021 James@Akemann.com <u>James</u> **V** <u>68</u> Akemann 1021 Westwood Dr Faribault MN 55021 (507) 334-8226 Victoria@Akemann.com Victoria 1 97 20625 Texas Ave Alossaimi Badr Prior Lake MN 55372 (952) 440-7138 Badr@Alossaimi.com -121 Anderson Anthony 226 Minnesota St S Shakopee MN 55379 (952) 445-7335 Anthony@Anderson.com 1 133 Anderson Caryl 941 272nd Ln NW Isanti MN 55040 (763) 444-7337 Caryl@Anderson.com V <u>142</u> Anderson Donna 10628 Maryland Ave S Bloomington MN 55438 (952) 941-7432 Donna@Anderson.com 1 13143 180th Ln NW 144 Anderson Elk River MN 55330 (763) 441-7433 Douglas@Anderson.com Douglas V 157 6721 116 1/2 Cir N Champlin MN 55316 (763) 422-9717 Anderson Jessica 4 1 Jessica@Anderson.com 1 20779 Gemini Trl <u>170</u> Anderson <u>Katie</u> Lakeville MN 55044 (763) 742-7933 Katie@Anderson.com **V** 179 Anderson Marie 21347 60th Ave Milaca MN 56353 (763) 444-7539 Marie@Anderson.com 1 186 Anderson Megan 1873 One Pine Estate Rd Elv MN 55731 (218) 343-7732 Megan@Anderson.com

Build and run your search query, then select the option to create a mass email campaign.



Select your options for the campaign, and click **[OK]**. *Typically I leave everything as default so I can verify how many people are actually going to receive the email which won't display if choose to send to a saved query. My example is below.*



Create a campaign name, select your options (or leave them as default) and click [OK].

Create a	New E-Mail Campaign						
E-Mail C	ampaign	-					
	Name: 2016 Fall Appeal - LYBUNT (Last Year But Not This Y	ear)					
	Campaign Name		Created				
	C Demonstration of links		12/17/2010				
	Resking Matters		01/17/2011				
	🚰 Test Donation Thank-You		10/06/2014				
	Event Thank-You (Contribution Total) - 2016 Celebrity Golf Tour	nament (9/20	09/20/2016				
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Send To -							
	Contacts	esses					
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	Everyone in database	ternate address					
		Primary address if available, otherwise all					
		Both primary and alternate addresses					
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Exclude/(Confirm						
	For those addresses to which 50 or more messages hav last registered open:	e been sent sin	ce the				
	Bypass sending the e-mail message.						
	Send the e-mail message, but include a request for confirmat receive e-mail. (Further e-mail will await a response to this re	tion of interest in quest.)	continuing to				
	Click here for a detailed explanation of this feature.						
	Remove Duplicates (not recommended for personalized emails))					



*If you choose to send to everyone in the current list you'll get a popup message that displays the total list of recipients who will receive your eblast, click **[OK]** to proceed.

In my example all emails were enabled, and there weren't any duplicates so the count remained the same at 998. If your number drops substantially your emails likely haven't been enabled and you'll need to send in a request to <u>support@trailblz.com</u>.



Setup a User to Receive Test Emails, How to Send Out Tests of Mass Email Campaigns, and How to Test an Individual Email Template

an Campaign	2016 Fall Assessed LIVELINT (Last Veral But Net This Veral)	
ivame:	2016 Fall Appeal - LYBONI (Last Year But Not This Year)	
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Contacts Contac	Warning Campaign "2016 Fall Appeal - LYBUNT (Last Year But will have a target list of 998 recipients. Do you wish to OK red open:	Not This Year)" o proceed? Cancel
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*If you choose to send to everyone in the current list the program will provide you with a popup message with the



You can now **insert one of the templates** you've previously created, insert one of our <u>standard templates</u> to start with, or **compose a new email** message. Enter a **subject line** before testing. Click the **[Test]** button in the bottom-right of the email composer. *My finished example is below.*



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Once you click on the **[Test]** button you'll get options for the user(s) you can send tests to. Check the boxes for the user(s) you want to send it to and click **[OK]**. In my example I only sent the test to myself.



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1. Select who to send the test to. The user(s) you setup in the first steps should now show in this list as 'testers'.



You'll get a popup message once the test has been submitted, click [Close].



[Close].

Below is an example of my 1st test, opened it MS Outlook (desktop version). The formatting didn't come exactly how I wanted so it's another example of why to run lots of tests! The next section shows how to test a single email template to anyone in the database who has an email address (not necessarily a user).



Setup a User to Receive Test Emails, How to Send Out Tests of Mass Email Campaigns, and How to Test an Individual Email Template



My first example test, since the spacing/getoripped/outrailblz.com/kb in MS Outlook I would continue fixing the code in Trail Blazer



#3 – Send Out a Test of an Individual Email Template to an Individual Contact (Anyone in the Database with an Email Address, Not Necessarily a User)

Search for the contact you want to send a test email to. The person must have an **email address present** that's currently **'enabled'**. *In my example I searched for a person named 'Raymond Webb'*.



Search for an open the contact record you want to send a single test email to.

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	🕨 🚺 14977 Webb Raymond 11 Sullivan Ave Farmingdale NY 11735 raywebb13@gmail.com
	Image: Webber Matthew 59579 110th St Rose Creek MN 55970 (507) 438-8625 Matthew@Webber.com
	2

Verify the contact has an email address, that it's enabled, and then click the **[Email]** button in the bottom-right.



Verify the contact has an email address present, that it's enabled, and then click [Email...] in the bottom-right.

Title: First Name Middle Name Last Name/Suffix Prior Last Name Nickname Contact Type:	Raymo Webb	dual	•		•	(N Em ray	Home Address Home Address 11 Sullivan Ave Farmingdale, NY 11735 Email raywebb13@gmail.com No Address						
General Household (Gallery	Attribute	Poll	Relation	Contribute	Pledge	Event	Logs	Sales	Admin			
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Insert your template that you've previously created, create a new message, or insert a standard template, then click [Send] in the bottom-right. In my example I inserted a template that was already saved.



S Create email	
File - Edit - 🞯	
From: 'Joel Kristenson' <jkristenson@trailblz.com></jkristenson@trailblz.com>	
To: raywebb13@gmail.com	
Subject: THIS IS A DRAFT	
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Click [OK] once the email has been sent.

×
Your message was sent.
ОК

Click [OK] when you get this message that your email test has been sent.

You can verify the test has been sent and when the recipient opens it (*as long as they download an image*) by navigating to the **email log** section of their record card:



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	54633	8/11/2016 1:56:04 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT			0					
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	54635	8/11/2016 2:01:19 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT			0					
	54636	8/12/2016 9:43:39 AM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/12/2016 9:45:43 AM	0					
	54637	8/12/2016 1:11:49 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/12/2016 1:12:33 PM	0					
	54638	8/12/2016 1:12:46 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT			0					
	54639	8/12/2016 1:37:06 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT			0					
	54640	8/15/2016 4:11:18 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/15/2016 4:11:56 PM	0					
	54641	8/16/2016 2:11:16 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/16/2016 2:28:34 PM	0					
	54642	8/16/2016 2:20:45 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/16/2016 2:29:51 PM	0					
	54643	8/16/2016 2:34:48 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT			0					
	54644	8/16/2016 3:12:48 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/16/2016 3:26:48 PM	0					
	54645	8/17/2016 3:46:24 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/17/2016 3:47:12 PM	0					
	54646	8/17/2016 4:11:51 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		8/17/2016 4:12:53 PM	0					
	54647	8/17/2016 4:17:04 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT			0					
	54648	9/14/2016 12:41:44 PM	jkristenson@trail	jkristenson@trail	THIS IS A DRAFT		9/14/2016 12:42:32 PM	0					
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Tip: It's recommended to test **many iterations** of an email to different people who will view it in **different email clients/devices** i.e. Gmail, Outlook, Hotmail, mobile, desktop etc., this tends to yield the best result and will point out any major anomalies. Also, it's good to have a very '**strong subject line**' that doesn't look 'spammy' – you can search Google for good info on the topic.



Trail Blazer

- YouTube Channel
- Knowledge Base Articles
- 3rd Party Resources



Related Resources

Article: Adding SPF / DKIM Key to your domain's Txt Record Greatly Improve Your Email Open Rates! (*requires access to your web host)
Article: Query by Email
Article: Deleting an Email Campaign
Article: Sample Custom Email Signup Form to Get you Started
Article: How to Import a Google Web Font into your Trail Blazer Email Template
Article: Configuring your From and Reply Email Address Settings
Article: How to Cancel a Mass Email Campaign as it's Going Out & Reschedule a Queued Email Campaign
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 Access and Use the Standard Trail Blazer Email Templates
Article: How to Create a Custom Thank-You Auto-Responder Email with Merge Fields for your Online Donation Form
Article: Mobile Responsive Email Template – Constant Contact Reference
Article: Sample HTML Email Templates with Inline CSS
Article: Fix your HTML email formatting
Article: Sending Out Test Emails
Article: Delayed email messages
Article: Email Opens and How Trail Blazer is Managing This Process

KNOWLEDGE BASE www.trailblz.com/kb



Article: Sending Mass Emails **Article:** Personalize your Emails Article: How to Create a Hyperlink around a Screenshot of your PDF Newsletter and Hyperlink it to the PDF Document 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 Upload Documents to your System Gallery such as PDF's, Spreadsheets, Audio Clips, Image Files, Etc. Article: Querying by Email Article: How to Create Trackable Links in your Email Campaigns, and Ho to Analyze those Statistics after the Eblast Goes Out Article: Running an Import of Contact Data from Excel into your Database - Basic Overview Article: Exporting Email Addresses from 3rd Party Mass Email Systems – Notes on CAN-SPAM Policies Article: How to Find Duplicate Contact Records by Identical *Primary* Email Address, and Automatically Merge them Together Video: Eblasts Create and Send Eblasts – Includes Image Management Video: Eblasts 101 – How do I send an Eblast Video: Eblasts 102 – Setting people up to receive test (drafts) emails Video: Scheduled Emails Video: Donation Auto Responders with Merge Fields Video Playlist: Eblasts

Trail Blazer Live Support

C 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.