

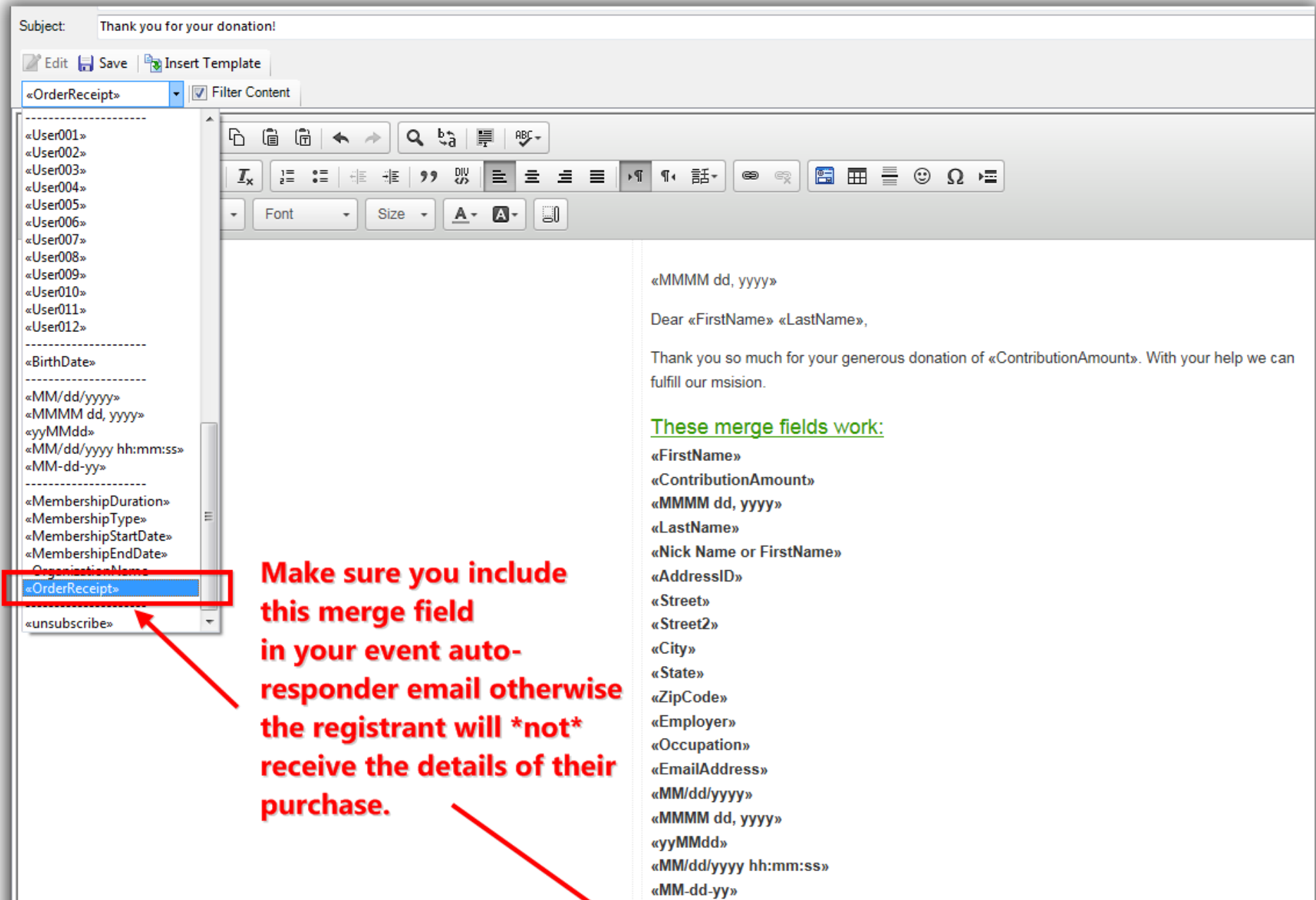
Author: Joel Kristenson
Last Updated: 2016-06-29

Overview

This article shows how to use one of your [custom email templates](#) as an **auto-responder** for a specific event. The article assumes you already know how to [create and customize your events](#).

By default **Trail Blazer** will send a receipt with the purchase information (*which is still an option as a **merge field***) but if you select one of your own templates for the **email response** it will *only* send that email response.

IMPORTANT! *If you decide to create your own email responder for events, it will *NOT* send the order receipt that normally goes out. If you want the details of their order to still be included in the email you'll need to use the merge field <<OrderReceipt>> which can be found at the bottom of the merge field drop-down (shown below):



Subject: Thank you for your donation!

Edit Save Insert Template

«OrderReceipt» Filter Content

- «User001»
- «User002»
- «User003»
- «User004»
- «User005»
- «User006»
- «User007»
- «User008»
- «User009»
- «User010»
- «User011»
- «User012»

«BirthDate»

- «MM/dd/yyyy»
- «MMMM dd, yyyy»
- «yyMMdd»
- «MM/dd/yyyy hh:mm:ss»
- «MM-dd-yy»

«MembershipDuration»

«MembershipType»

«MembershipStartDate»

«MembershipEndDate»

«OrganizationName»

«OrderReceipt»

«unsubscribe»

«MMMM dd, yyyy»


Dear «FirstName» «LastName»,

Thank you so much for your generous donation of «ContributionAmount». With your help we can fulfill our msion.

These merge fields work:

- «FirstName»
- «ContributionAmount»
- «MMMM dd, yyyy»
- «LastName»
- «Nick Name or FirstName»
- «AddressID»
- «Street»
- «Street2»
- «City»
- «State»
- «ZipCode»
- «Employer»
- «Occupation»
- «EmailAddress»
- «MM/dd/yyyy»
- «MMMM dd, yyyy»
- «yyMMdd»
- «MM/dd/yyyy hh:mm:ss»
- «MM-dd-yy»

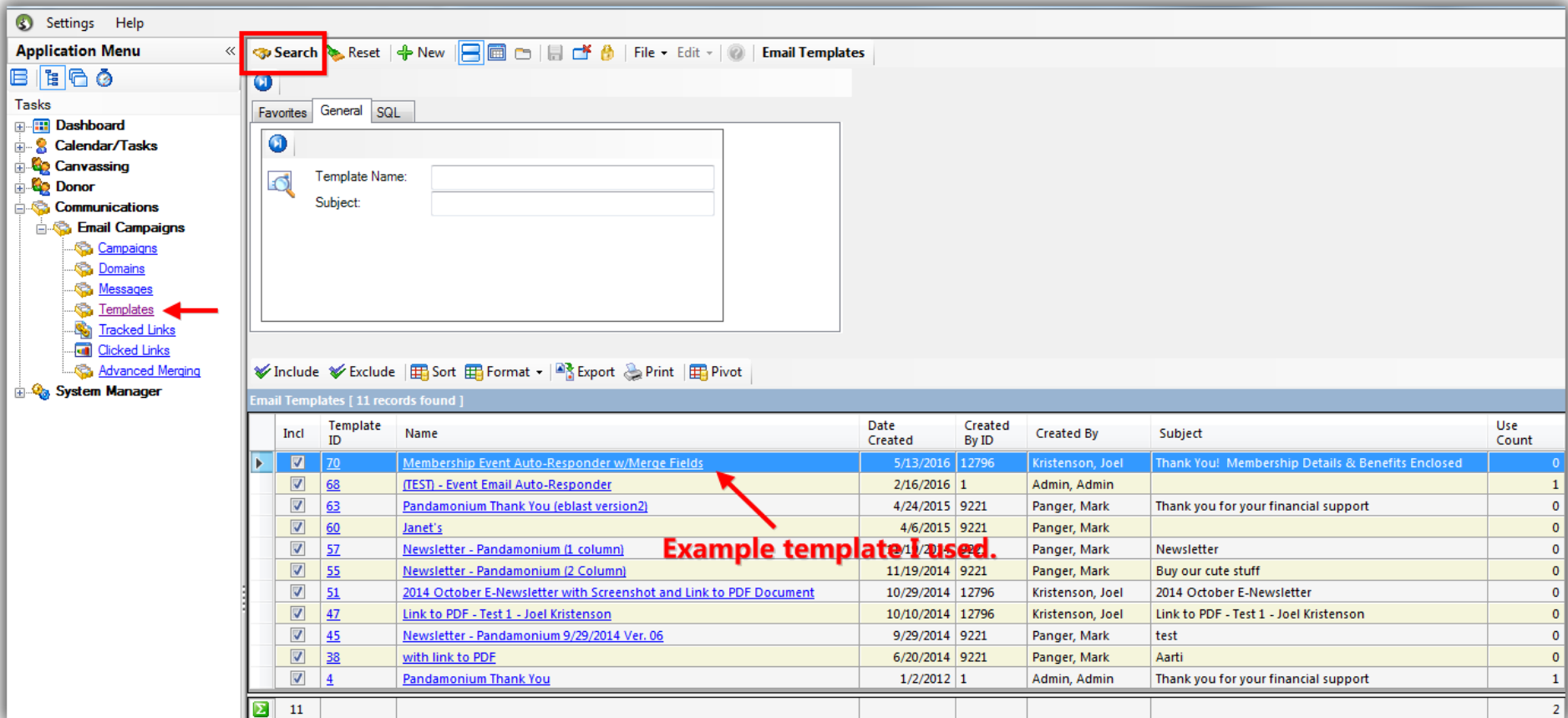
Make sure you include this merge field in your event auto-responder email otherwise the registrant will *not* receive the details of their purchase.

 **Tip:** Get a head start with your email template creation by using one of our [Standard Internal Trail Blazer Templates](#).

Steps

First you'll want to verify that the template you want to use has been created in your Templates list. *My example is below called '**Membership Event Auto-Responder w/Merge Fields**' as shown in the image below.*

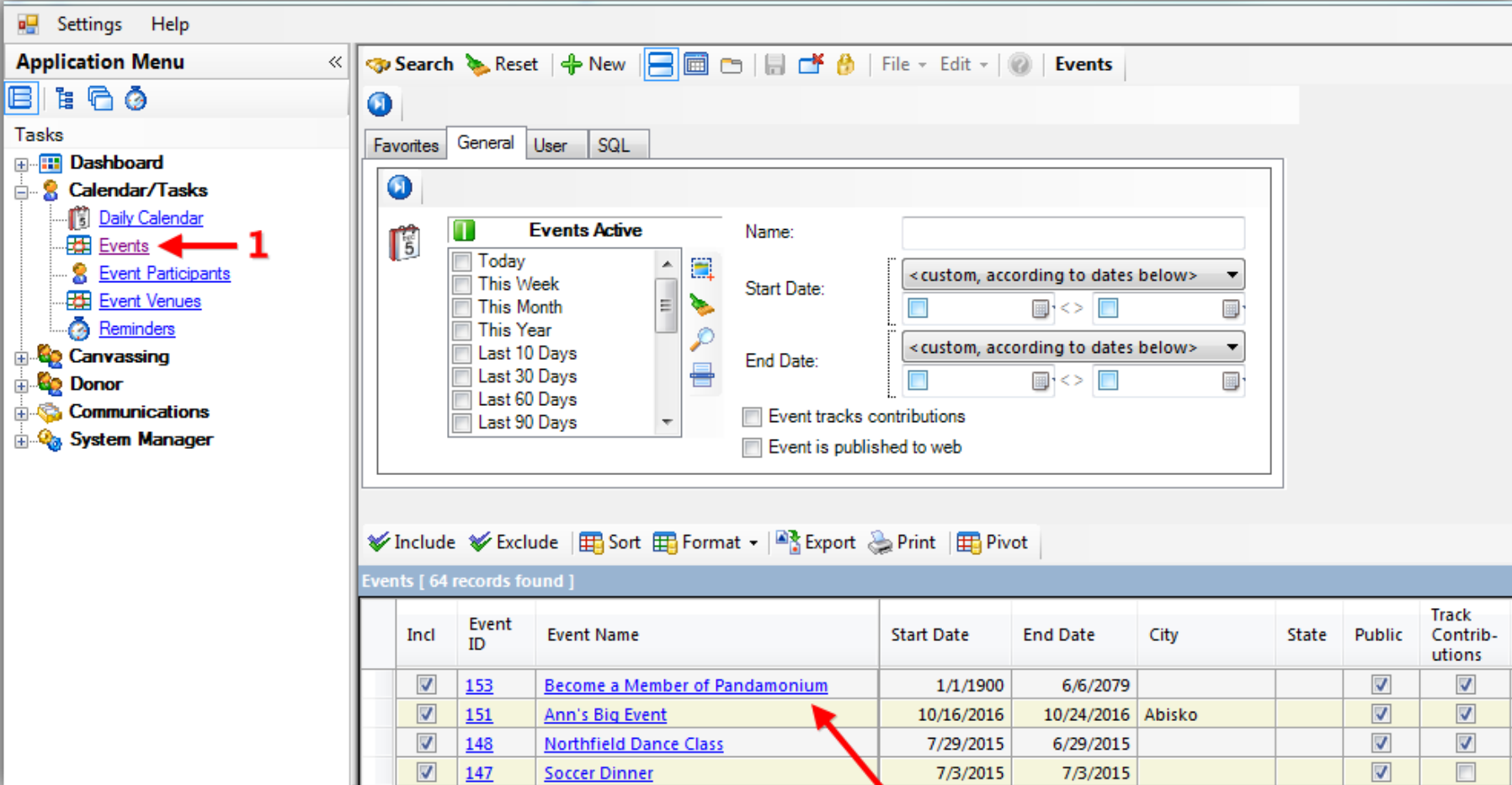
Verify the template you want to use as an auto-responder for an event has been created, if not you'll need to create it in the Templates list.



Incl	Template ID	Name	Date Created	Created By ID	Created By	Subject	Use Count
<input checked="" type="checkbox"/>	70	Membership Event Auto-Responder w/Merge Fields	5/13/2016	12796	Kristenson, Joel	Thank You! Membership Details & Benefits Enclosed	0
<input checked="" type="checkbox"/>	68	(TEST) - Event Email Auto-Responder	2/16/2016	1	Admin, Admin		1
<input checked="" type="checkbox"/>	63	Pandamonium Thank You (eblast version2)	4/24/2015	9221	Panger, Mark	Thank you for your financial support	0
<input checked="" type="checkbox"/>	60	Janet's	4/6/2015	9221	Panger, Mark		0
<input checked="" type="checkbox"/>	57	Newsletter - Pandamonium (1 column)	11/19/2014	9221	Panger, Mark	Newsletter	0
<input checked="" type="checkbox"/>	55	Newsletter - Pandamonium (2 Column)	11/19/2014	9221	Panger, Mark	Buy our cute stuff	0
<input checked="" type="checkbox"/>	51	2014 October E-Newsletter with Screenshot and Link to PDF Document	10/29/2014	12796	Kristenson, Joel	2014 October E-Newsletter	0
<input checked="" type="checkbox"/>	47	Link to PDF - Test 1 - Joel Kristenson	10/10/2014	12796	Kristenson, Joel	Link to PDF - Test 1 - Joel Kristenson	0
<input checked="" type="checkbox"/>	45	Newsletter - Pandamonium 9/29/2014 Ver. 06	9/29/2014	9221	Panger, Mark	test	0
<input checked="" type="checkbox"/>	38	with link to PDF	6/20/2014	9221	Panger, Mark	Aarti	0
<input checked="" type="checkbox"/>	4	Pandamonium Thank You	1/2/2012	1	Admin, Admin	Thank you for your financial support	1
<input checked="" type="checkbox"/>	11						2

If you don't have a template created yet you'll want to [create your own](#) with the merge fields you want to use, or choose from one of our [Standard Templates](#) as a starting point.

After verifying that your email template is ready, navigate to the **Events** list and open the event you want to configure an email-responder for. *In my example I opened the most recent event in my database which was setup to sell [memberships](#) and was called '**Become a Member of Pandamonium**'.*

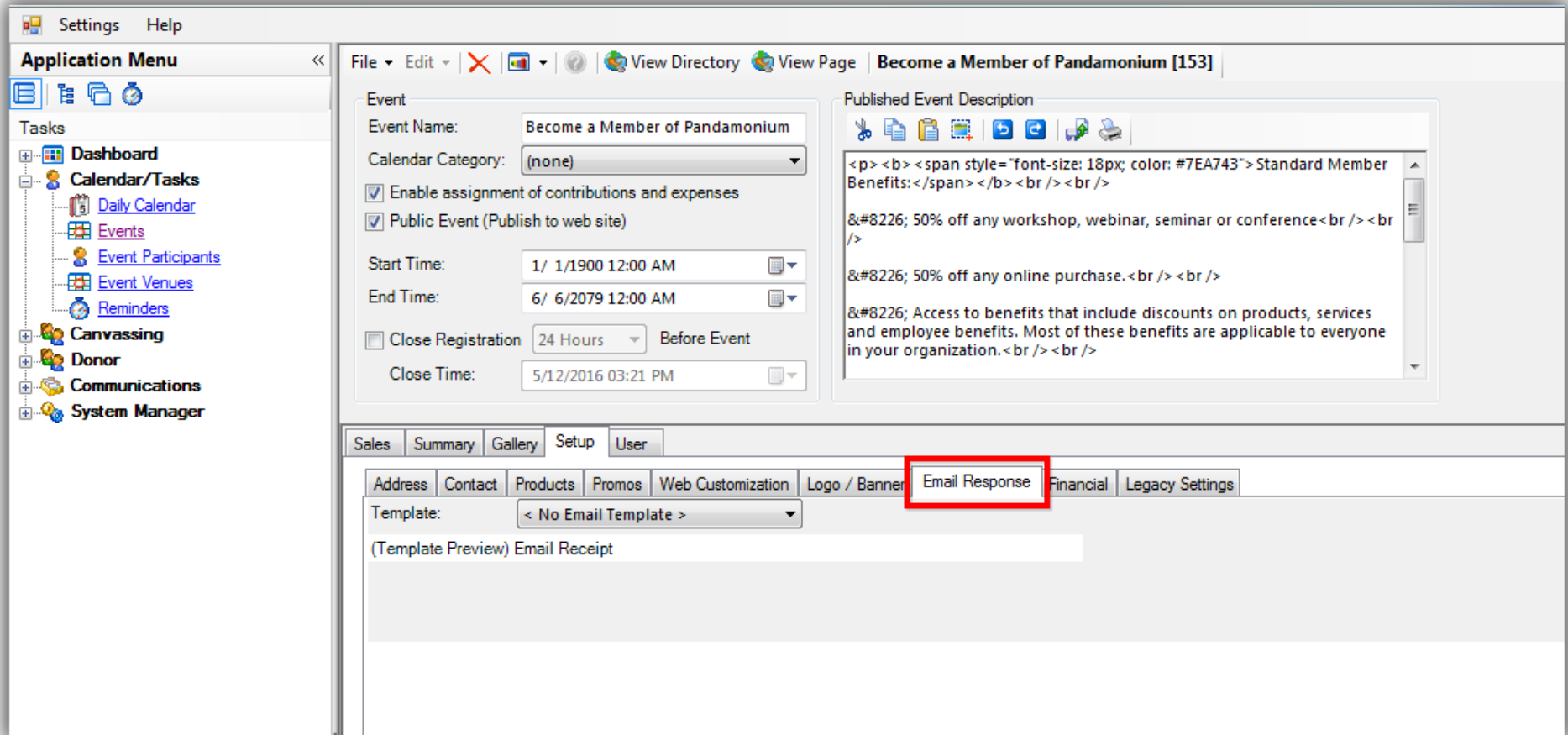


1

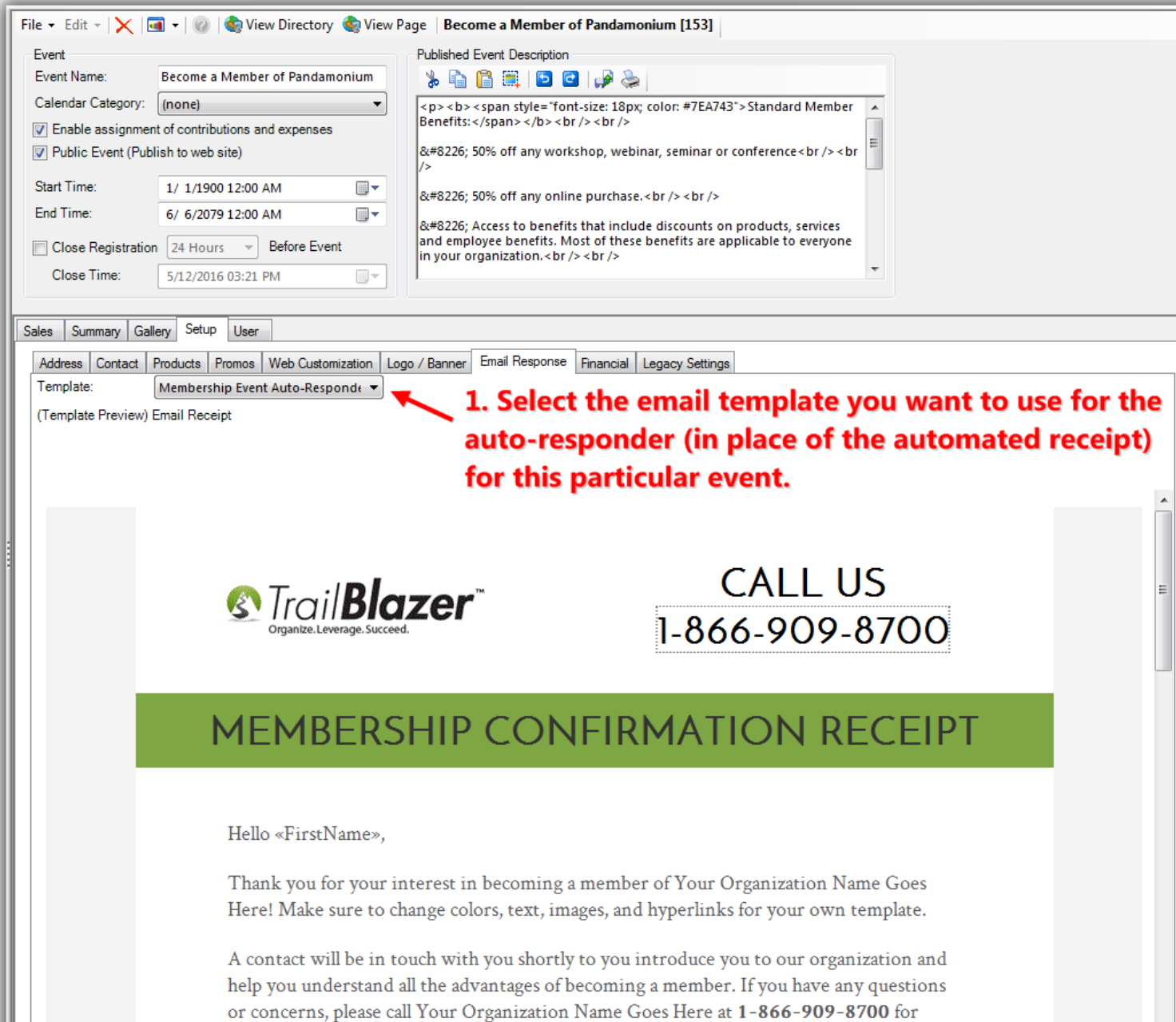
2. Click on the name of your event to open the event record.

Incl	Event ID	Event Name	Start Date	End Date	City	State	Public	Track Contributions
<input checked="" type="checkbox"/>	153	Become a Member of Pandamonium	1/1/1900	6/6/2079			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	151	Ann's Big Event	10/16/2016	10/24/2016	Abisko		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	148	Northfield Dance Class	7/29/2015	6/29/2015			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	147	Soccer Dinner	7/3/2015	7/3/2015			<input checked="" type="checkbox"/>	<input type="checkbox"/>

Navigate to the **Email Response** tab within the event record underneath **Setup**.



Select the template you want to use from the drop-down menu and click **[Save]**.



The screenshot shows the TrailBlazer software interface. At the top, there's a navigation bar with 'File', 'Edit', and 'View Directory' options. Below that, the 'Event' configuration panel is visible, showing the event name 'Become a Member of Pandamonium' and various settings like 'Enable assignment of contributions and expenses' and 'Public Event (Publish to web site)'. The 'Published Event Description' field contains HTML code for member benefits.

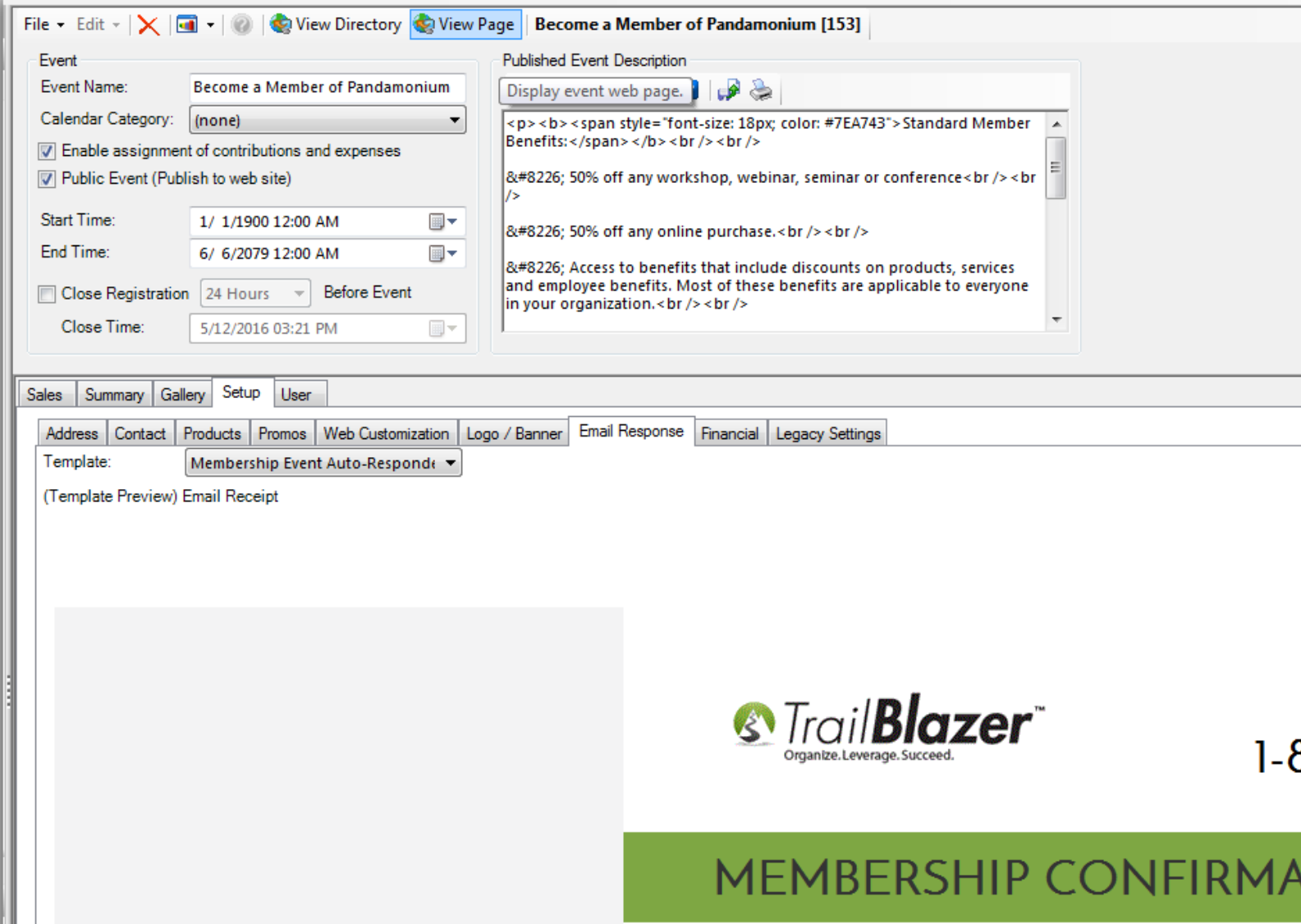
Below the event configuration, there's a menu bar with options like 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. Under 'Setup', there's a sub-menu with 'Address', 'Contact', 'Products', 'Promos', 'Web Customization', 'Logo / Banner', 'Email Response', 'Financial', and 'Legacy Settings'. The 'Email Response' option is selected, and a dropdown menu shows 'Membership Event Auto-Response' as the chosen template. A red arrow points to this dropdown with the text: **1. Select the email template you want to use for the auto-responder (in place of the automated receipt) for this particular event.**

The main content area displays a preview of the 'Membership Confirmation Receipt' email template. It features the TrailBlazer logo on the left and a 'CALL US 1-866-909-8700' box on the right. Below this is a green banner with the text 'MEMBERSHIP CONFIRMATION RECEIPT'. The body of the email starts with 'Hello <FirstName>', followed by a thank you message and a closing statement: 'A contact will be in touch with you shortly to you introduce you to our organization and help you understand all the advantages of becoming a member. If you have any questions or concerns, please call Your Organization Name Goes Here at 1-866-909-8700 for'.

Run a test signup through your event to verify the email looks how you want it to, and that the merge fields you chose to utilize are functioning correctly (*not all merge fields work in auto-responder emails*). *This process is laid out in the sequence of screenshots below.*


Img 1 of 7 – After Saving the Event, Click [View Page]







Click the [View] page button to open the event and test it.




The screenshot shows the TrailBlazer software interface. At the top, there is a menu bar with 'File', 'Edit', and 'View Directory'. A 'View Page' button is highlighted with a red arrow. Below the menu bar, the event details are displayed for 'Become a Member of Pandamonium [153]'. The event name is 'Become a Member of Pandamonium', and the calendar category is '(none)'. There are checkboxes for 'Enable assignment of contributions and expenses' and 'Public Event (Publish to web site)'. The start time is '1/ 1/1900 12:00 AM' and the end time is '6/ 6/2079 12:00 AM'. The close registration is set to '24 Hours' before the event, with a close time of '5/12/2016 03:21 PM'. The published event description is visible in a text area, containing HTML code for bold text and line breaks. Below the event details, there are tabs for 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. The 'Setup' tab is active, showing a 'Template' dropdown set to 'Membership Event Auto-Responde'. Below the template dropdown, there is a preview area for the email receipt. The TrailBlazer logo is visible in the bottom right corner of the interface, and the page number '1-8' is displayed next to it. A green banner at the bottom of the page contains the text 'MEMBERSHIP CONFIRMA'.

Img 2 of 7 – Select an Item (Ticket/Product/Membership) and Click [Order]

Powered by  TrailBlazer™

Share:      






Become a Member of Pandamonium

 **TrailBlazer™**
Organize. Leverage. Succeed.

Membership

- \$50.00 1 Year - Bronze
- \$75.00 1 Year - Silver
- \$100.00 1 Year - Gold
- \$125.00 1 Year - Platinum
- \$5000.00 Lifetime Membership
- \$250.00 1 Year - Family Membership (Max 5 Persons)

Payment Options


2

[Order](#)

Description

Standard Member Benefits:

- 50% off any workshop, webinar, seminar or conference
- 50% off any online purchase.
- Access to benefits that include discounts on products, services and employee benefits. Most of these benefits are applicable to everyone in your organization.
- One year subscription to our bi-monthly e-newsletter




Img 3 of 7 – Fill Out the Top-Half of Test Event Purchase

Fill out a test event purchase/registration (top-half).

Share: [f](#) [in](#) [t](#) [+](#) [G+](#) [0](#)

Become a Member of Pandamonium



Organize. Leverage. Succeed.

Order Summary

DESCRIPTION	PRICE	QTY	TOTAL
1 YEAR - BRONZE	\$50.00	1	\$50.00
			TOTAL DUE \$50.00

Organizer

Trail Blazer

☎ 866-909-8700

✉ support@trailblz.com

Have you registered for a *Pandamonium!!* event before? [click here](#) to login.

Registration Information

Buyer Information

* First Name

* Last Name

Phone

* Email

Yes, I want to receive future email updates.

* Employer

* Job Title

Comment

Payment Options

Disclaimer

For the security conscious - You may notice this page does not display the padlock or https in the address bar. However, the portion of the page above that captures your name and credit card information is connected by secure server to our database provider (Trail Blazer). **Their server IS securing your credit card**

Img 4 of 7 – Fill Out the Bottom-Half of Test Event Purchase

Payment Options

Disclaimer

For the security conscious - You may notice this page does not display the padlock or https in the address bar. However, the portion of the page above that captures your name and credit card information is connected by secure server to our database provider (Trail Blazer). **Their server IS securing your credit card transaction.** Depending on your browser, you can verify this by right mouse clicking on the white space inside the the gray borders near your name and address. From the menu select Properties. This will display the URL: <https://www.trailblz.info/DemoNonProfitMark/contribute.aspx> and a button that allows you to display Trail Blazer's secure certificate information.

Billing Information

* Address

* City
* State
* Zip Code

Payment Information

VISA MasterCard DISCOVER AMERICAN EXPRESS P.O.

Payment Type

Please enter the code you see here

If you aren't purchasing a 'free' item make sure you select something beside a credit card i.e. Purchase Order, Pay at the Door, Bill Me, etc.

Img 5 of 7 – Order Confirmation Page after Purchase

After the purchase has been made you have the options to return to a different web page and/or print out the details.

Pandamonium!!

Return to: [Return to Our Home Page](#)

[Print Receipt](#)

Your Invoice

Thank you for your order. Below is your confirmation. Please keep a copy for your records.

Your Customer Number is: 20987

Your Order Number is: 00001196

Your Order Date is: Monday, May 16, 2016 4:12 PM

Your order for [Become a Member of Pandamonium](#) is complete!

Billing

Joel Kristenson
9110 Golden Valley Rd
Apt 10
Golden Valley MN 55427

Contact

Phone:
Email: jkristenson@trailblz.com

Item	Name	Unit	Qty	Total
191	1 Year - Bronze Membership 05/16/2016 to 05/15/2017	\$50.00	1	\$50.00

Subtotal \$50.00
Balance Due \$50.00

Img 6 of 7 – Top-Half of My Example Email Response that Went Out

Top-half of the example email response that went out for this test purchase.



CALL US
1-866-909-8700

MEMBERSHIP CONFIRMATION RECEIPT

Hello Joel,

Thank you for your interest in becoming a member of Your Organization Name Goes Here! Make sure to change colors, text, images, and hyperlinks for your own template.

A contact will be in touch with you shortly to introduce you to our organization and help you understand all the advantages of becoming a member. If you have any questions or concerns, please call Your Organization Name Goes Here at **1-866-909-8700** for assistance.

ACCOUNT SUMMARY

Name: Joel Kristenson
Organization:
Membership Type: 1 Year - Bronze
Membership Length: 1 year
Annual Renewal: May 15, 2017

BILLING INFORMATION

Address: 9110 Golden Valley Rd, Golden Valley, MN 55427
Phone Number:
Email: jkristenson@trailblz.com
Payment Amount: \$50.00
Payment Date: May 16, 2016
Confirmation #: 1196

Img 7 of 7 – Bottom-Half of My Example Email Response that Went Out

Bottom-half of my example email auto-responder for this test event purchase.

BILLING INFORMATION

Address: 9110 Golden Valley Rd, Golden Valley, MN 55427
Phone Number:
Email: jkristenson@trailblz.com
Payment Amount: \$50.00
Payment Date: May 16, 2016
Confirmation #: 1196

TAKE ADVANTAGE OF YOUR MEMBERSHIP

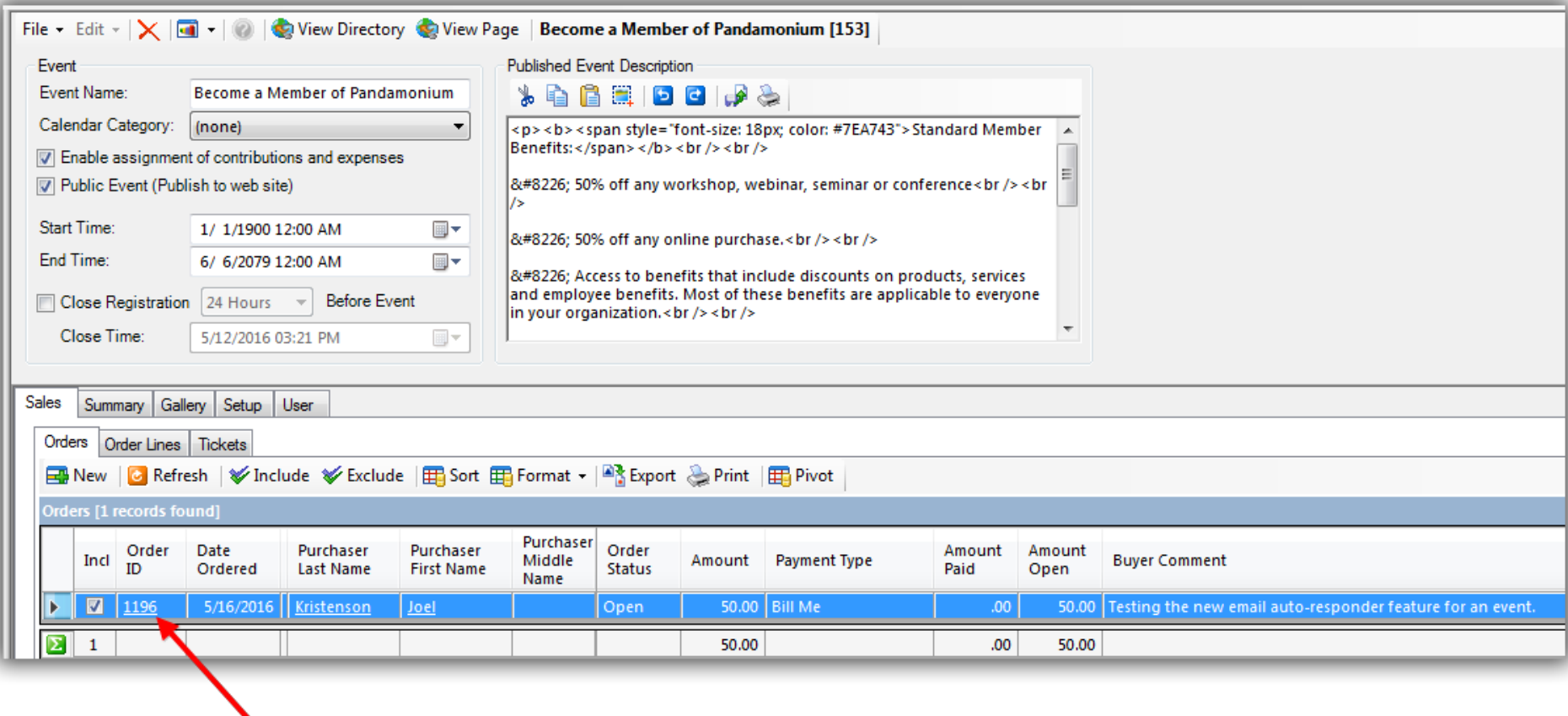
- » 50% off any services, list your special services here...
- » These are examples that you'll want to **swap out with your own**...
- » Example goes here...
- » One year subscription to cloud hosting (valued at \$599).
- » One year subscription to the nation's leading Database News:
 - » 50% off online products from our website store (valued at \$65).
 - » Full Guide to Using Trail Blazer (valued at \$750).

[Call to Action Hyperlink Goes Here!](#)



Repeat these steps until you are satisfied with the way your auto-responder emails looks. Once you're finished you can purge your test orders by following the steps below.

Img 1 of 3 – Open the Test Order under the Sales > Orders Tab

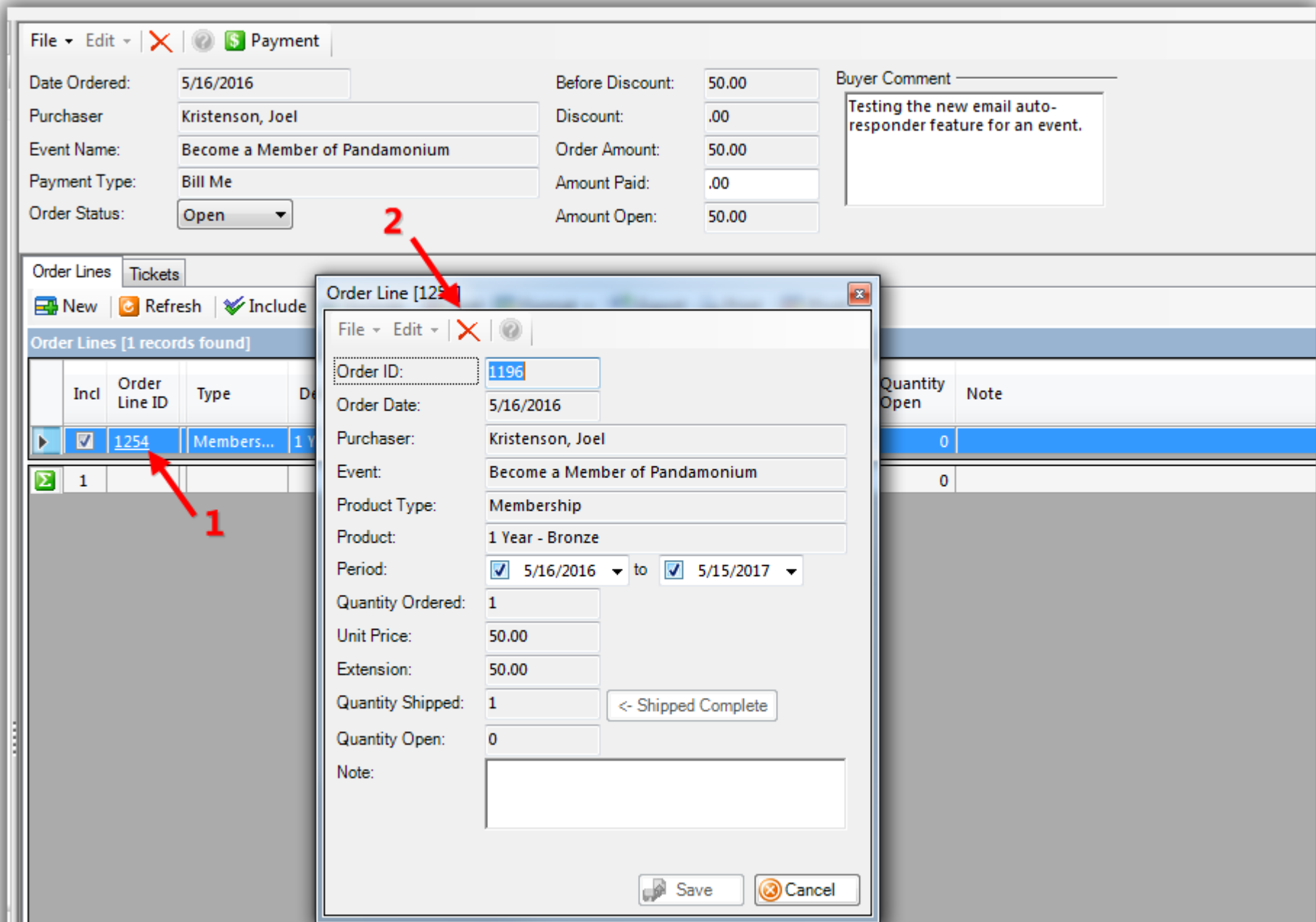


The screenshot shows the TrailBlazer web interface. At the top, there's a navigation bar with 'File', 'Edit', and 'View Directory' options. The main content area is titled 'Become a Member of Pandamonium [153]'. It features a form for event details on the left and a 'Published Event Description' text area on the right. Below the form, there are tabs for 'Sales', 'Summary', 'Gallery', 'Setup', and 'User'. Under the 'Sales' tab, there are sub-tabs for 'Orders', 'Order Lines', and 'Tickets'. A toolbar with icons for 'New', 'Refresh', 'Include', 'Exclude', 'Sort', 'Format', 'Export', 'Print', and 'Pivot' is visible. Below the toolbar, a table shows 'Orders [1 records found]'. The table has columns for 'Incl', 'Order ID', 'Date Ordered', 'Purchaser Last Name', 'Purchaser First Name', 'Purchaser Middle Name', 'Order Status', 'Amount', 'Payment Type', 'Amount Paid', 'Amount Open', and 'Buyer Comment'. The first row is highlighted in blue and contains the following data: '1196', '5/16/2016', 'Kristenson', 'Joel', 'Open', '50.00', 'Bill Me', '.00', '50.00', and 'Testing the new email auto-responder feature for an event.'. A red arrow points to the 'Order ID' link '1196'.

To delete a test purchase order, open the order by clicking on the 'Order ID' link.

Img 2 of 3 – Open Each Order Line and Delete it

How to Create Custom Email Responders for Specific Events – New 2016 Feature Upgrade



The screenshot displays the TrailBlazer software interface. At the top, there is a menu bar with 'File', 'Edit', and a close button. Below the menu bar, there are several input fields for order details:

- Date Ordered: 5/16/2016
- Purchaser: Kristenson, Joel
- Event Name: Become a Member of Pandamonium
- Payment Type: Bill Me
- Order Status: Open
- Before Discount: 50.00
- Discount: .00
- Order Amount: 50.00
- Amount Paid: .00
- Amount Open: 50.00
- Buyer Comment: Testing the new email auto-responder feature for an event.

In the center, there is a table titled 'Order Lines [1 records found]'. The table has columns for 'Incl', 'Order Line ID', 'Type', and 'D'. The first row is highlighted in blue and contains the following data:

Incl	Order Line ID	Type	D
<input checked="" type="checkbox"/>	1254	Members...	1 Y

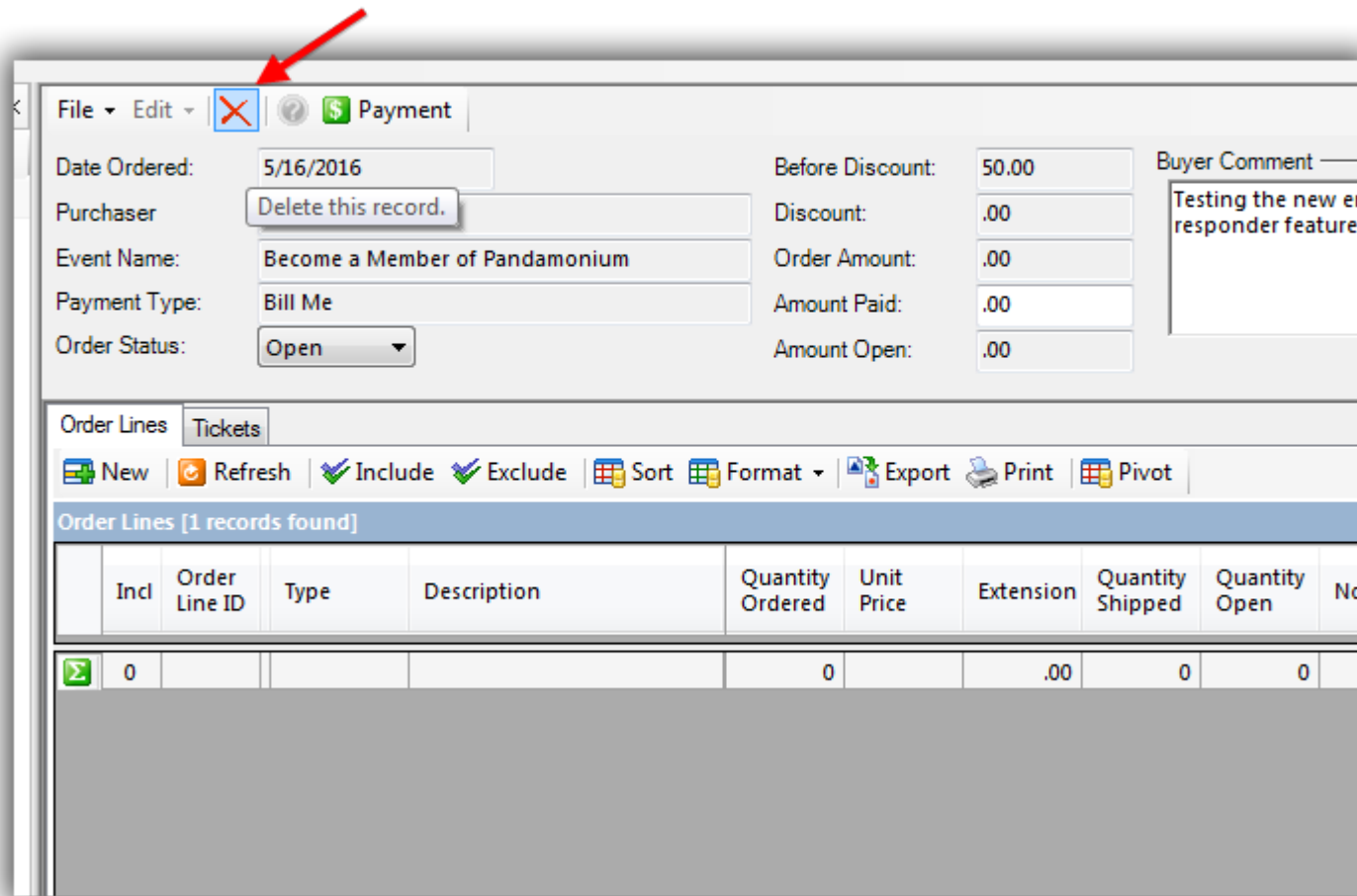
Red arrow '1' points to the 'Order Line ID' field in the table. A red arrow '2' points to the 'Order ID' field in the 'Order Line [1254]' dialog box. The dialog box contains the following fields:

- Order ID: 1196
- Order Date: 5/16/2016
- Purchaser: Kristenson, Joel
- Event: Become a Member of Pandamonium
- Product Type: Membership
- Product: 1 Year - Bronze
- Period: 5/16/2016 to 5/15/2017
- Quantity Ordered: 1
- Unit Price: 50.00
- Extension: 50.00
- Quantity Shipped: 1 (with a '<- Shipped Complete' button)
- Quantity Open: 0
- Note: (empty text area)

At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons.

Img 3 of 3 – Delete the Full Test Order Once Each Order Line has been Removed

Purge the entire test order once each order line has been deleted.



The **Related Resources** below link to a variety of other articles and videos related to mass email.



Trail Blazer™

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

Related Resources

Article: [How to Create Trackable Links in your Email Campaigns, and How to Analyze those Statistics after the Eblasts Goes Out](#)

Article: [How to Cancel to Mass Email Campaign as it's Going Out & How to Reschedule a Queued Email Campaign](#)

Article: [Configuring your From and Reply Email Address Settings](#)

Article: [How to Upload Documents to your System Gallery such as PDF's, Spreadsheets, Audio Clips, Image Files, Etc.](#)

Article: [How to Create a Hyperlink around a Screenshot of your Video and Link to the Video from your Trail Blazer Email Templates](#)

Article: [How to Create a Hyperlink around a Screenshot of your PDF Newsletter and Hyperlink it to the PDF Document](#)

Article: [How to Access and Use the Standard Trail Blazer Templates as a Starting Point for Template Creation and Mass E-Mail Campaigns](#)

Article: [From and Reply To Email Addresses for Mass Emails](#)

Article: [Email Thank You Auto-Responders](#)

Video: [Video Playlist for Events](#)

Video: [Donation Auto Responders with Merge Fields](#)

Video: [Eblasts Create and Send Eblasts – Includes Image Management](#)

Video: [Scheduled Emails](#)

Video: [Eblasts –Setting people up to receive test \(draft\) emails](#)

Video: [Eblasts Configure email settings before mass emailing](#)

Video: [Thank you's using mass email](#)

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.*