

Author: Kristenson, Joel Last Updated: 2016-09-21

Overview

This article shows how to thank people for the **total amount** they donated, at an event, **via a mass email campaign** – it utilizes a new merge field called **<<EventContributionTotal>>**.

This was a request a customer had in 2016. If you have a request for a feature that doesn't exist you can drop us a line through the **Start Page Comment Box** when you first log into the program.

Tip: Learn how to **create email templates**, and schedule mass email campaigns in this <u>20 minute how-to video</u>.



<u>Steps</u>

Navigate to the Contributions list under the Application Menu. Requires appropriate security clearance.







Search by the **event** you're thanking people for spending money at. *In this example I searched by an event called '2016 Celebrity Golf Tournament'* which produced 136 transactions.



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You'll only be sending to people who have an email address that's enabled for mass email so you'll want to add that to your search query as well. Navigate to the **Contact (Voter/Donor)** tab > **General** > **E-Mail** > **Plug it in** > Select the **Present** radio button > Click **[Search]** to refresh the list.

(Example below where the query now filters by donations at the event and only people who have an email present).







Select File > Create Mass Email...



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Give the email campaign a name and click [OK].



1. Give the email campaign a name.

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Select your **event** you're sending out a receipt for and click **[OK]**.



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Name:	Demo Nonprofit Joel	
Organization:	Demo Nonprofit Joel	
From Address:	jkristenson@trailblz.com	
Reply Address:	jkristenson@trailblz.com	
Other-		
Event:	2016 Celebrity Golf Tournament 🔹	
	2 💿 OK 💿 Close	

Create a **Subject Line** and compose your message, my *example* is below. *If you've previously created a template you can insert it, or you could start* with one of the built-in '<u>Standard Trail Blazer Templates</u>'.



14

ile 🝷 Edit 🝷 🛞 🔯 Saved Copies 🔳 Results 🛛 🛃 🛅 💽 Event Thank-You (Contribution Total) - 2016 Celebrity Golf Tournament (9/20/16)
From: jkristenson@trailblz.com 1. Create a Subject Line.
To: 19 Recipient(s)
ubject: Thanks for coming to our big event! (tax-receipt enclosed)
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Trail Blazer Templates or one Cryanize.Leverage.Succeed.
that you've saved previously).
Thanks for your support at our big event!
P Dear «FirstName» «LastName»
^P Thanks for coming to our event, it was a huge success and broke all expectations!
Here's a copy of your tay deductible contributions:
nere's a copy of your tax-deductible contributions.
Total:
vear when the event will be even bigger and better!
Sincerly,
Joel Kristenson
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Put your mouse cursor in the area of the email where you want the event contribution total to populate, then select the merge-field drop-down and click on the one called << EventContributionTotal>>.







Below is an *example* of what the merge field should look like once it's inserted.



. . . .

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Thanks for your support at our big event!	
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Dear «Firstname» «Lastname»,	
^P Thanks for coming to our event, it was a huge success and broke all expectations!	
Here's a copy of your tax-deductible contributions:	
Total: «EventContributionTotal»	
Let us know if you have any questions. We look forward to seeing you there next year when the event will be even bigger and better!	
Sincerly,	E
Joel Kristenson	
® Your Organization Name, MM, DD YYYY	
YourEmailAddress@email.com 1-123-456-7891	
	-



Run a **test** of the email by clicking the **[Test]** button in the bottom-right. *If you need to set up more <u>database users</u> as email testers <u>this article</u> shows how.*

Tip: It's useful if 'you' are one of the people who gave to the event so that you can verify the total amount populates correctly in your test email prior to sending to everyone in the list (if you're sending to multiple recipients).



File 🝷 Edit 🝷 🔞 🗞 Saved Copies 🖪 Results 🛛 🚰 🛅 💽 Event Thank-You (Contribution Total) - 2016 Celebrity Golf Tournament (9/20/16)
From: jkristenson@trailblz.com
To: 19 Recipient(s)
Subject: Thanks for coming to our big event! (tax-receipt enclosed)
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Thanks for your support at our big event!
PDear «FirstName» «LastName»,
 ^PThanks for coming to our event, it was a huge success and broke all expectations! Here's a copy of your tax-deductible contributions: Total: «EventContributionTotal»
^P Let us know if you have any questions. We look forward to seeing you there next year when the event will be even bigger and better!
Sincerly, Joel Kristenson
Sour Organization Name, MM, DD YYYY YourEmailAddress@email.com 1-123-456-7891 Set Im

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Select who to send the test to and click [OK].



Click [Close] after you get the message that your test has been submitted.



Campaign Submittal	
A test run of campaign "Even (Contribution Total) - 2016 C Tournament (9/20/16)" has b submitted for sending than	t Thank-You elebrity Golf een k you!
t	Close

Here's what my example looked like:



From: To:	Demo Nonprofit Joel <jkristenson@trailblz.com> Joel Kristenson</jkristenson@trailblz.com>	Sent:	Tue 9/20/2016 4:40 P	м
Cc: Subject:	Thanks for coming to our big event! (tax-receipt enclosed) [Test 2]			
	Thanks for your support at our big event!		Ċ	
	Dear Joel Kristenson,			
	Thanks for coming to our event, it was a huge success and broke all expectations!		Γ	
	Here's a copy of your tax-deductible contributions: Total: \$3,230.00	je-f	ield	
	Let us know if you have any questions. We look forward to seeing you there next year when the event will be even bigger and better!			
	Sincerly, Joel Kristenson			
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i See n	nore about: Joel Kristenson.		 	~



Tip: If you want to verify the amount is populating correctly you can search the **Contributions** list by a **single recipient** who gave to your event. Then verify the total in the database matches what they receive in their email. *My example is below where the total correctly equaled* \$3,230.00:



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	V	<u>5582</u>	8/12/2014	<u>Kristenson</u>	Joel	Anders	2,965.00		V	2/1/2016			9110 Golden Valley Rd	Apt 10
		<u>5581</u>	8/12/2014	Kristenson	Joel	Anders	265.00			2/1/2016			9110 Golden Valley Rd	Apt 10
Σ	2						3,230.00	0	2		0			

Tip: To verify the merge field is working you can filter the 'Contributions' list to show a single KNOWLEDGE BASE <u>mail recipient</u> who gave to thesevent and the total in this list should match what they receive in the mass email campaign.



Once you're satisfied with the test results you can either **schedule** the campaign to go out in the future or send it right away. To bring up these options you'll start by clicking the **[Send]** button in the bottom-right of the email composer, select your options, and click **[OK]**. *My example is below to schedule the campaign for the 10/1/16*.



File 🝷 Edit 👻 🚳 Saved Copies 🔄 Results 📑 🤖 💽
From: jkristenson@trailblz.com
To: 19 Recipient(s)
Subject: Thanks for coming to our big event! (tax-receipt enclosed)
📝 Edit 🔚 Save 🍡 Insert Template 🔚 Save Template Priority Normal 👻 🗖 Forward to Friend 🕅 Unable-to-Read Link
«EventContributionTo 👻 📝 Filter Content
De Source Q @ 🛣 🖧 🛱 I 📾 🛧 → 🔍 🔩 💭 I 🕸+
BIUS×₂ײIZx [ﷺ ₩ ₩ 99 號] = = = >¶ ¶ ₩ 話→ @ @
Schedule E-mail Campaign
Your message will be sent to 19 recipients.
2. Either 'send now' or
Send now 'schedule' it for the future. ≥vent!
Send at scheduled time
I/2016 04:52 PM
Here's a copy of your tax-deductible contributions:
Total: «EventContributionTotal»
^P Let us know if you have any questions. We look forward to seeing you there next year when the event will be even bigger and better!
^P Sincerly, Joel Kristenson -
body table tbody tr td table tbody tr td table tbody tr td p

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The related resources below link to a large variety of articles and videos on the mass email and event features.



YouTube Channel

- Knowledge Base Articles

- 3rd Party Resources



Related Resources

Article: Configuring your From and Reply Email Address Settings Article: How to Create Custom Email Responders for Specific Events – New 2016 Feature Upgrade 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: How to Create a Custom Thank-You Auto-Responder Email with Merge Fields for your Online Donation Form Article: How to Cancel a Mass Email Campaign as it's Going Out & How to Reschedule a Queued Email Campaign Article: Sending Out Test Emails Article: Deleting an Email Campaign 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 Import a Google Web Font into your Trail Blazer Email Template Article: Sample HTML Email Templates with Inline CSS Article: Events 2014 – Part I Article: Events 2014 – Part II Article: Events 2013 | How to Create an Event with Tickets and Merchandise Video: Eblasts – Setting people up to receive test (draft) emails Video: Thank You's using mass email Video: Scheduled Emails Video: Eblasts Create and Send Eblasts – Includes Image Management Video: Eblasts Configure email settings before mass emailing



Video: <u>Donation Auto Responders with Merge Fields</u>
Video: <u>Events 2013</u>
Video: <u>Events – pay for an event online</u>
Video: Events – Remove Person from Event

Trail Blazer Live Support

- **(C)** Phone: 1-866-909-8700
- Brail: support@trailblz.com
- 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 <u>is</u> included in your contract.

