CRM: Communications Email Campaign

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Donor CRM has the ability to create email campaigns for marketing communications allowing you to send custom messages to segmented groups of contacts.

> **NOTE**: To send a gift or pledge **thank you**, pledge reminder or year-end letter, use the options from the left navigation under Communications.

Create Email Campaign

Begin by selecting **Communications** > **Email Campaigns** from the left navigation.

- Click the **Create New Email Campaign+** button
- Search for specific contacts, or apply an advanced filter and click **Next**

> **NOTE**: There is no limit to the number of contacts that can be added to an email campaign, however, by clicking the 'Select All' checkbox it will only select the 50 contacts shown on that page. You will need to go to the next page and click the 'Select All' checkbox to add an additional 50 contacts and so on.

- Email setup
    - Enter an Email Subject (Required)
        - Will appear in the subject of the email
    - (Optional) Enter a reply email address in the Email From field if you would like for your contacts to be able to reply to the email
        - If left blank, it will be sent from our the standard Donor CRM no-reply email address: notifications_crm@mail.donorcrm.givesmart.com
    - (Optional) Enter a label in the From Label field to customize who the email will appear to be sent from
    - Click Next
- Create or select a template
    - The 1st time an email campaign is created, you'll need to create a template. Simply begin typing in the editor box to craft your template.
        - Merge fields are able to be added by typing # and a dropdown of available fields will appear
    - Once you've crafted your template, complete the **Template Title** field
    - Select Save to save the template, then select **Next**
- Preview the message, then click **Next**
- Review recipient list to ensure contacts and emails are valid

    - For any contacts that have multiple emails, it will default to the primary email on the contact record, but you can select a different email from the dropdown
    - Contacts who are missing an email, an Edit Contact link will be seen. If clicked, a modal will popup allowing you to edit the contact record and add an email on file without leaving the email campaign.
    - Contacts with known invalid or unsubscribed emails it will be indicated here, and you'll have the option to select a different email on the account or add a new one
        - If invalid or unsubscribed email remains, you are still able to send the email campaign
    - Click **Next** once review is complete
- Confirm and **Send**

Important to Note: Only 1 email campaign can be processing at a time. A new email campaign cannot be created until the status has achieved Complete. Status can be reviewed on the Communications > Email Campaign Page in the Status column. An email campaign can take as few as a few minutes to achieve Complete status, but could take as long as 48 hours for campaigns that contain many contacts with unsubscribed or invalid email addresses.

Activities Created

When an email campaign is sent, and Activity is created to maintain a record of outreach.

- Activity is created for each contact record (individual or organization)
    - Type: Custom Email
    - Date: Cannot Edit
    - Delete: Not allowed

Review Sent Email Campaigns

On the Communications > Email Campaign page you are able to review past email campaigns, and recently sent email campaigns that are still processing.

For any email campaigns that are marked as Complete in the Status column, you can click on the linked number in the Sent to column to review messages that were sent successfully and to review failed messages.

To view the email template that was sent in a complete email campaign, select the link in the Email Template column. The version of the template that was sent with this campaign will be maintained, even if the template used was modified after it was sent.

Email Campaign Counter

When on the Communications > Email Campaign page, in the top right corner you will notice a sent email counter. There is a quota of 25,000 emails that can be sent in a single calendar year.

What counts towards the 25,000 email quota?

- Emails sent from the Email Campaign tab
    - Does not include emails sent from receipts, gift or pledge thank you's, pledge reminders nor end-of-year letters
- Successfully sent emails from the email campaigns tab
    - Does not include emails that were marked as Failed

Create Advanced Filter: Subscribed or Unsubscribed

To quickly view a list of contacts or to remove unsubscribed contacts from an email campaign, an advanced filter can be created.

- From the left navigation, select Filters
- Click Add Filter
- Select the Folder to store the filter
- From the Show Me dropdown, select Contacts
- Under Conditions:
    - 1st Value = Value
    - 2nd Value = Primary Email
    - 3rd Value = Is Subscribed or Is Unsubscribed
- Save

This advanced filter can now be applied on the Contact Listing Page or as a filter on an Email Campaign.

FAQ

Do you need an integration with Constant Contact to use the Email Campaign feature?

- No, this is a native feature in Donor CRM and does not require any external integrations.

If a contact has multiple emails on their record, if they unsubscribe from one email are all their emails unsubscribed?

- No, only the email where they clicked unsubscribe will be unsubscribed. Other emails on the record will still be subscribed.

I'm trying to create an email campaign but the Create New Email Campaign button is greyed out. Why can't I create a campaign?

- Only 1 email campaign can be in a pending or processing status at a time. On the Communications > Email Campaign page, if you view the Status column and one of the campaigns says they are Pending or Processing, a new campaign can not be created until Status = Complete.