



Setting up Email Audience and Delivery

There are five main steps involved in creating a coaching email in the EMC:

1. Build the Message
2. Select the Audience
3. Review Delivery Details
4. Send Message to Delivery Queue
5. Review Delivery Stats

Note: Convio will not de-dup multiple email addresses. The system logic is set to send one email only per constituent. If multiple constituent records have the same email address, that email address will receive the email numerous times, addressed to each of the individual constituents.

This document covers Steps 2-5. See [Creating a Coaching Email for Step 1](#)

2. Select the Audience

- o Select Group/Participation Types
- o Set Registration and/or Team filters (if applicable)

3. Review Delivery Details

- o Schedule to send at a future time
- o Define in Do Not Email Groups

4. Send Message to Delivery Queue

- o Delivery will begin immediately or at the scheduled date and time

5. Review delivery statistics to determine the success of the message

- o Number of Emails Sent, Open rates, Click through/action rates etc.

Begin Delivery

Login to the EMC and select the event you would like to manage.

- Click on the **Event Emails** tab.
- Click **Edit Coaching Emails**, under the Related Actions menu.
- Click **Begin Delivery**, under the Action Column of the Email being sent.

The screenshot shows the EMC interface with the 'Event Emails' tab selected. The breadcrumb trail is 'Event Emails > TeamRaiser Emails: Daffodil Dash - Columbia Valley 2016: Messages'. The 'Message List' button is circled in red. Below the navigation, there are search and pagination controls. A table displays message details for 'Amanda TEST'. The 'Action' column for this message contains several links, with 'Begin Delivery' circled in red and a blue arrow pointing to it.

Message	Action	Status	Type	Tentative Schedule	Last Modified
Amanda TEST Subject: Sample Email for EMC Training	Copy Delete Archive Preview Return to Draft Begin Delivery	Approved (never sent)	Coaching - participants	No Tentative Schedule	10-Jun-2016 11:47:05 AM by Ms. Amanda Oldershaw



Select the Audience

There are five group options to choose from:

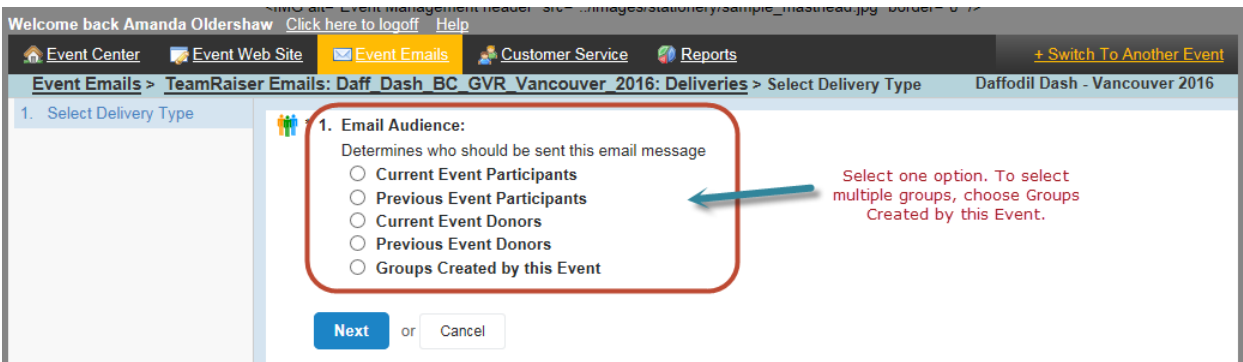
- Current Participants
• Previous Participants
• Current Donors
• Previous Donors
• Groups Created by Event

Note: If this is the first year for the event, the Previous Participants and Previous Donor options will not appear.

Only one option can be chosen. Some groups have a variety of filters and options available upon selection. For detailed information about Audience segmentation and filters available in each Group see - Understanding Email Filters.

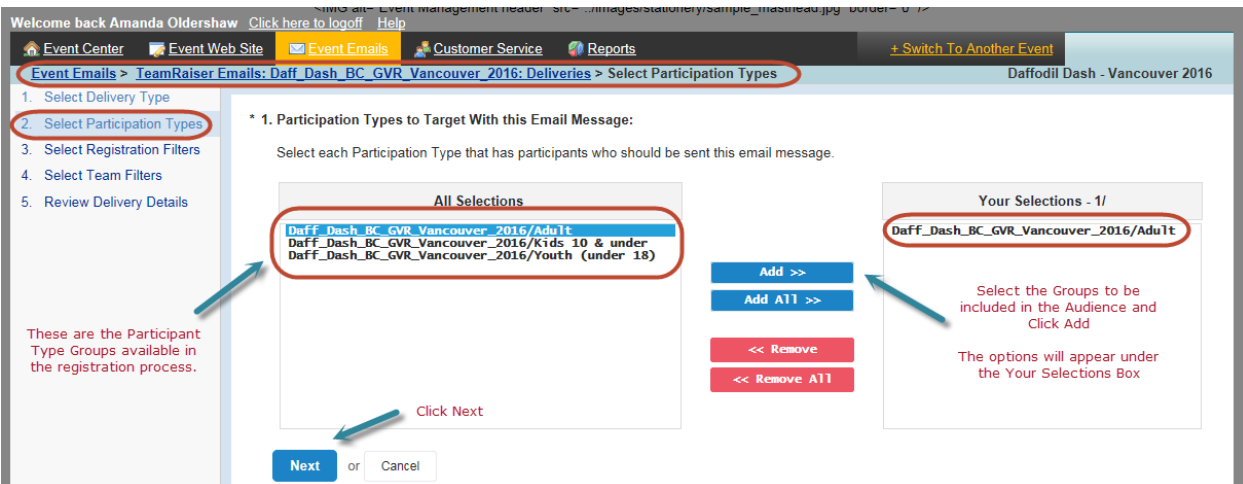
1. Select Delivery Type

- Select the Email Audience that best suits the purpose of the email being sent.



2. Select Participant Types

- Select and highlight the desired groups/participant types under the All Sections box
• Click Add to move the selections over the Your Selections box
• Click Next





3. Select Registration Filters (if applicable)

- Select and configure the **Registration Filters**, if applicable
- Click **Next**

See [Understanding Email Filters](#) for a detailed explication of Filters

The screenshot shows the 'Select Registration Filters' step in the email setup process. The breadcrumb trail is 'Event Emails > TeamRaiser Emails: Daff_Dash_BC_GVR_Vancouver_2016: Deliveries > Select Registration Filters'. The left sidebar contains a list of steps: 1. Select Delivery Type, 2. Select Participation Types, 3. Select Registration Filters (highlighted), 4. Select Team Filters, and 5. Review Delivery Details. Below the list is a 'Related Actions' section with a link for 'Configure Additional Filters' and a 'More options' link. At the bottom of the sidebar is a 'Click Next' instruction with an arrow pointing to the 'Next' button. The main content area has three sections: 1. Previous Event Participation Filter: Select the appropriate option to determine which participants currently registered for this event should be sent this email message. Options: All current participants regardless of previous participation, Current participants who also participated in the previous event, Current participants who did not participate in the previous event. 2. Online/Offline Registration Filter: Select the appropriate option to determine which participants currently registered for this event should be sent this email message based on how they registered for the event. Options: All current participants regardless of their online or offline registration method, Current participants who registered online, Current participants who registered offline. 3. Date Range: Send to current participants registered during the following dates. Start Date: Jun 13 2016. End Date: Jun 13 2016. At the bottom are 'Next' and 'Cancel' buttons.

4. Select Team Filters (if applicable)

- Select and configure the **Team Filters**, if applicable
- Click **Next**

The screenshot shows the 'Select Team Filters' step in the email setup process. The breadcrumb trail is 'Event Emails > TeamRaiser Emails: Daff_Dash_BC_GVR_Vancouver_2016: Deliveries > Select Team Filters'. The left sidebar contains a list of steps: 1. Select Delivery Type, 2. Select Participation Types, 3. Select Registration Filters, 4. Select Team Filters (highlighted), and 5. Review Delivery Details. Below the list is a 'Related Actions' section with a link for 'Configure Additional Filters' and a 'More Options' link. At the bottom of the sidebar is a 'Click Next' instruction with an arrow pointing to the 'Next' button. The main content area has two sections: 1. Team Membership Filter: Select the groups of people participating on a team that should be sent this email message. (Note: To exclude a group of team participants from this mailing, remove the checkmark from its checkbox.) Options: Individual participants not on a team, Team members, Team captains, Company coordinators of teams, Team members without a captain. 2. Company Affiliation Filter: Select the appropriate option to determine which participants will be sent this email message based on their association with a company. Options: All participants whether company affiliated or not, Participants affiliated with any company team, Participants affiliated with the following company. Below this is a field for '* Name of the Specific Company:'. At the bottom are 'Next' and 'Cancel' buttons.



5. Review Delivery Details

This screen is summarizing all the details of the email.

- Schedule
- Target Groups
- Do not Email Groups
- Filters Applied
- Delivery Options

There are two additional configurations available, under the Related Actions Menu.

- **Schedule** – emails can be scheduled to be sent at a future date and time.
- **Do Not Email Groups** – additional do not email groups can be configured outside of the built-in Email Opt-Out filters

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Event Center | Event Web Site | **Event Emails** | Customer Service | Reports | [+ Switch To Another Event](#)

Event Emails > TeamRaiser Emails: Daff_Dash_BC_GVR_Vancouver_2016: Deliveries > Review Delivery Details | Daffodil Dash - Vancouver 2016

- Select Delivery Type
- Select Participation Types
- Select Registration Filters
- Select Team Filters
- Review Delivery Details

Related Actions

- Schedule
- Manage Do Not Email Groups

More options

Sender ID/Sender Policy Framework:
The domain name in the From address you used for this email is not configured to identify Luminata Online as an authorized sender. Doing so is essential to ensure your email is not mistaken for spam. For instructions, see the [Luminata Customer Center](#) (login required)

Ignore this warning if a cancer.ca email has been used in the Sender field

1. Delivery Details:
Review the delivery details and use the Related Actions to define the schedule and recipients of this message. To display the number of projected recipients, use Calculate Audience. To make changes to the message, click Cancel to display the Delivery List and click the Messages tab to locate the message and return it to a Draft state where you can make changes.

Amanda Test

Schedule
Immediately (no schedule is set)

Target Groups
This message is targeted for the following audience groups:

Group	Last Rebuilt	Rebuild at Delivery
Daff_Dash_BC_GVR_Vancouver_2016/Adult	Group is not rebuildable	No

[Help me with Rebuild at Delivery settings](#)

Do Not Email Groups
This message will not be sent to anyone in the target audience who are members of the following Do Not Email groups:

Group	Last Rebuilt	Rebuild at Delivery
TeamRaiser Coaching Emails Opt-Out: Daff_Dash_BC_Vancouver_2016.21227	Group is not rebuildable	No

[Help me with Rebuild at Delivery settings](#)

Filters Applied ([About Email Filtering](#))
After applying the filter conditions, this message will be sent to the target audience members who:

Filter Condition	Filter Type
Participants who have not met their delayed self-pledge commitment	TeamRaiser Filter

[About Email Filtering](#)

Delivery Options
After applying the selected delivery options, this message will be sent:
No options were selected

2. Ready to Send to Delivery Queue
Send this email message to all of the members of the audience you have configured who have not already received a copy. Members who have already received a given message are automatically excluded.

Send Immediately

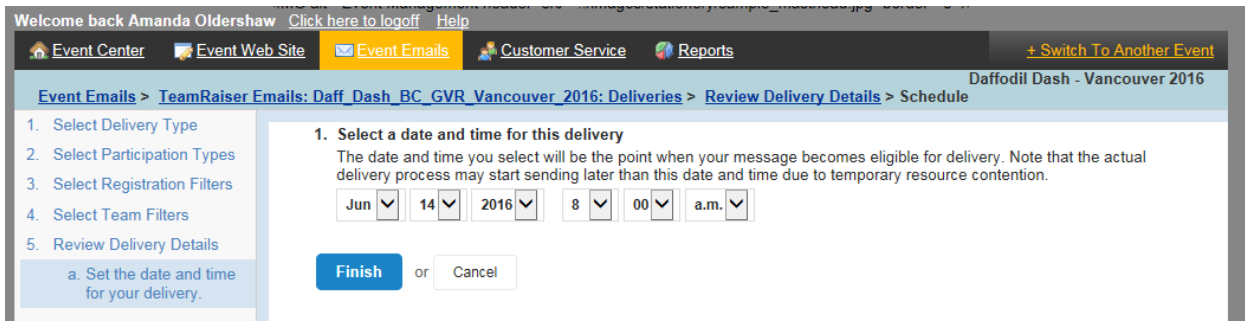




Scheduling an Email

- Click **Schedule**, under the Related Actions Menu.
- **Set the date and time** the email for the email to be sent.
- Click **Finish**.

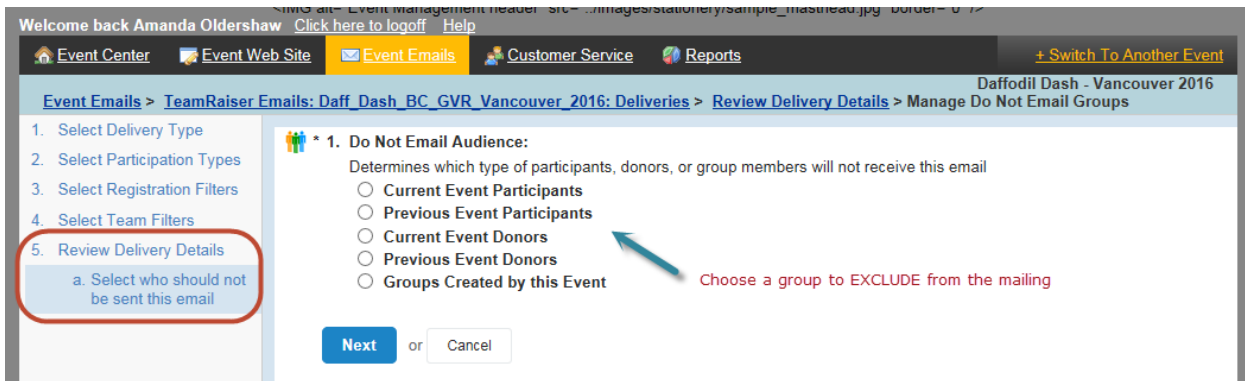
Note: Convio functions on Central time (two hours ahead of PST). So if you are in BCY, and schedule an email for 8am, it will actually be sent at 8am CST, which is 6am PST.



Manage Do Not Email Groups

- Click **Manage Do Not Email Groups**, under the Related Actions Menu.
- Select the group to be excluded from the mailing.
- Click **Finish**.

Note: The system automatically excludes any participant who has opted out of receiving email.





If a Do Not Email group has been selected in error, it can be removed by:

- Click **Manage Do Not Email Groups**, under the Related Actions Menu.
- Select the Current Event Participants group
- Click the Allow All button
- Click Finish

Note: This will remove all additional Do Not Email Groups. Re-add groups if necessary.

Send Message to Delivery Queue

Review the summary screen one last time to ensure all the details are correct.

- Click **Send Immediately** or **Send at Scheduled Time**.

Delivery	Action	Status	Schedule	Completed
Amanda TEST Subject: Sample Email for EMC Training Number Sent: 0	Review Cancel	Queued	Immediate	



Review Delivery Stats

Once the message has been sent, statistics are populated. This may take a few minutes depending on how large the audience is.

- Click **Review**, on the Delivery List Tab
- A detailed list of delivery stats are available

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Event Center Event Web Site **Event Emails** Customer Service Reports [+ Switch To Another Event](#)

Event Emails > TeamRaiser Emails: Daffodil Dash - Columbia Valley 2016: Deliveries Daffodil Dash - Columbia Valley 2016

Related Actions

- Begin Message Delivery
- Refresh this page

This is a list of the Coaching Emails scheduled to be sent for this TeamRaiser.

[Message List](#) **Delivery List**

Records 1 - 4 of 4 [First](#) [Previous](#) [Next](#) [Last](#)

Page 1 of 1

Delivery	Action	Status	Schedule	Completed
Amanda TEST Subject: Sample Email for EMC Training Number Sent: 2 Open Rate: 50%	Review Resend Archive	Sent	Immediate	13-Jun-2016 7:00:06 PM

Review detailed email stats

Quick Snapshot of Stats

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Event Center Event Web Site **Event Emails** Customer Service Reports [+ Switch To Another Event](#)

Event Emails > TeamRaiser Emails: Daffodil Dash - Columbia Valley 2016: Deliveries > Amanda TEST Daffodil Dash - Columbia Valley 2016

1. Review the delivery status and details

Related Actions

- Refresh this page
- Update the statistics for this delivery

1. Review the details for this delivery

This page shows the details for the delivery record you've chosen.

Amanda TEST

Current Status

Current status of your delivery:

Status:	Completed
Delivery Started on:	06/13/2016 at 06:59 PM CDT
Delivery Ended on:	06/13/2016 at 07:00 PM CDT
Statistics Updated on:	06/13/2016 at 07:09 PM CDT

[Learn more](#)

Schedule

Immediately (no schedule is set)

Statistical results of the delivery:

Open Rate		Number Sent	
Recipient Opens	1 50%	Total Recipients	2
Recipient Click-Throughs	0 0%	Total Opens	1
Recipient Actions	0 0%	Total Click-Throughs	0
Forwarded Opens	0	Hard Bounces	0
Forwarded Click-Throughs	0	Soft Bounces	0
Forwarded Actions	0	Unsubscribes (Opt-Outs)	0
Total Recipients Forwarding via Website	0	Total Messages Forwarded via Website	0

[Explain These Statistics](#)