Create an Email Campaign
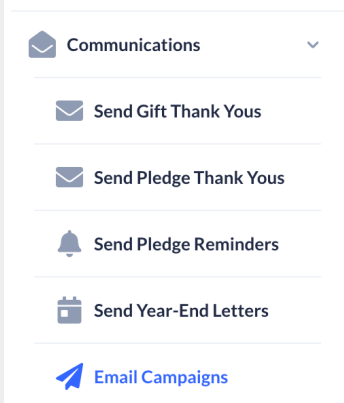
Donor CRM has the ability to create email campaigns for marketing communications allowing you to send custom messages to segmented groups of contacts.
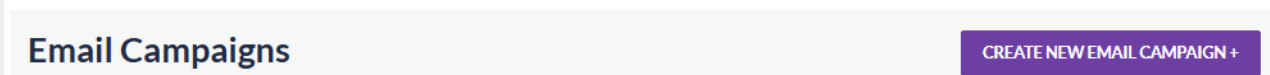
> **NOTE:** To send a gift thank you email, navigate to Communications >Send Gift Thank Yous instead.

Create an Email Campaign

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

2. Select **Create New Email Campaign+**

3. Search for specific contacts or apply an advanced filter. Click **Next**.

Email Campaigns

CREATE NEW EMAIL CAMPAIGN +   📄 DOWNLOAD EXCEL (UTC)

Search

| Search... |

23 sent of 25000 total ⑦

Email Template ⇕	Sent to ⇕	Failed ⇕	Sent Date ⬇	Email Subject ⇕	Email From	Status ⇕
With Salutation	3	1	Feb 28, 2024	Demo Test	notifications_crm@mail.donorcrm.givesmart.com	Complete
No Salutation	1	1	Feb 26, 2024	PO Test From	Stephanie.Hann@communitybrands.com	Complete
Test Template (copy)	3	0	Feb 19, 2024	PO Email From Test	stephanie.hann@communitybrands.com	Complete
No Salutation	1	3	Feb 19, 2024	Testing Email From PO Email	stephanie.hann@communitybrands.com	Complete
Test Template	2	0	Feb 09, 2024	Test PO FR50	stephanie.hann@communitybrands.com	Complete
Test Template (copy)	3	2	Feb 07, 2024	Test CC and BCC	stephanie.hann@communitybrands.com	Complete
Test Template	2	0	Jan 30, 2024	PO Test Email	stephanie.hann@communitybrands.com	Complete
Test Template	2	0	Jan 29, 2024	Test Email With BCC and CC	stephanie.hann@communitybrands.com	Complete
Test Template	6	6	Jan 25, 2024	Test Custom Email	stephanie.hann@communitybrands.com	Complete
Test Template	0	3	Jan 19, 2024	Test SH	notifications_crm@mail.donorcrm.givesmart.com	Complete
Summary totals		Count: 10				

« ‹ **1** › »

> **NOTE**: There is no limit to the number of contacts that can be added to an email campaign. The 'Select All' checkbox 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 Configuration

- Enter an Email Subject (Required)
- (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.**

Post-Send and Review

IMPORTANT: Only one email campaign can be processing at a time. A new email campaign cannot be created until the status column has been updated to "**Complete**".

An email campaign can take as few as a 2 minutes to achieve the "Complete" status, but could take as long as **48 hours** for campaigns that contain a significant amount of contacts with unsubscribed or invalid email addresses.

Email Campaigns

CREATE NEW EMAIL CAMPAIGN + 　　📊 DOWNLOAD EXCEL (UTC)

Search

Search...

0 sent of 25000 total
ⓘ

emplate ⬍	Sent to ⬍	Failed ⬍	Sent Date ⬇	Email Subject ⬍	Email From	Status ⬍
act to Q1	0	0	Mar 04, 2024	March Email Campaign	notifications_crm@mail.donorcrm.givesmart.com	Processing
ry totals	Count: 1					

Review Sent Email Campaigns

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

For any completed Email Campaign, select the "*Sent to*" quantity to be taken to the Activities page.

Email Campaigns

Search

Search...

Email Template ⇕	Sent to ⇕
Banquet	2106
Banquet	2105

From here, select *Activity type* and filter by **Email Campaign**. All email recipients will be listed, along with the email sent status noted in the "Notes" column.

Activities ⚙

☑ Show completed   **+ ADD NEW**

Activity type
Email Campaign ⌄

Due date range
Pick Date Range

Completion date range
Pick Date Range

Assignee
Search for the user ⌄

Filters
Select filter ⌄   ☐ Invert filter

APPLY   RESET

⚙	ID	User	Contact	Type ⇕	Due Date ⌄	Completion Date ⇕	Notes
...	333095	Scott	Scott	Email Campaign		Nov 18, 2024	Email Failed
...	333096	Scott	Roland	Email Campaign		Nov 18, 2024	Sent email

From Activities, review emails that were sent successfully or failed to be delivered. You may export this report by selecting the "Download Excel" action in the upper right corner.

- The Activity is also viewable on each contact record (Individual or Organization)
  - Type: Email Campaign
  - Date: Cannot Edit
  - Delete: Not allowed

To view the email template that was sent in a completed 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 being sent.

Email Campaigns

CREATE NEW EMAIL CAMPAIGN +   📊 **DOWNLOAD EXCEL (UTC)**

Search

Search...

2 sent of 25000 total
⊙

Email Template ⇕	Sent to ⇕	Failed ⇕	Sent Date ⌄	Email Subject ⇕	Email From	
Kirsten Template	2	0	Feb 29, 2024	Kirsten Test	notifications_crm@mail.donorcrm.givesmart.com	
Summary totals		**Count: 1**				

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.
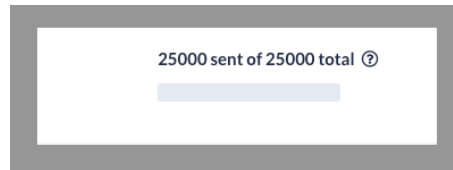
What counts towards the 25,000 email quota?

- 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

View Subscribed or Unsubscribed Email Statuses

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.

| Folder | Default Fundraising Filters ⌄ | **Filter Explanation** |
| Show me | CONTACTS ⌄ | Show me all Contacts where the value of Primary Email is unsubscribed . |

Matched

0

out of 16 CONTACTS

1st CONDITION   🗑

where the [Value ⌄] of [Primary Email ⌄]   [Is Unsubscribed ⌄]

➕ ADD ANOTHER CONDITION

[SAVE]   [SAVE & PREVIEW]   [CANCEL]

Email Campaign FAQs

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.

The "Create New Email Campaign" button is greyed out. Why can't I create a campaign?

- Only 1 email campaign can have a "Processing" status.
- From *Communications > Email Campaign*, the **Status** column will note either Processing or Complete. A new campaign cannot be created until the Status = Complete.

I'm trying to send an Email Campaign but receive an error message noting "primary emails are not subscribed to mailing list."

- See here for next steps: https://donorcrmhelp.givesmart.com/help/email-campaign-not-subscribed-error