

# Sending broadcast emails

## OVERVIEW

The Broadcast Email tool in 4-H Online is a powerful email management tool. Sending a Broadcast email is basically a 2 step process – first creating a report that includes the intended recipients and then creating/sending the email.

## SELECTING THE RECIPIENTS

The first step in sending an email is to designate recipients via the Reports tool. There are multiple ways to manage this step, but there are two recommended approaches.

1. Use any existing report that currently contains the desired recipients
2. Keep one report designated as an email “filtering” report and then edit this report as a first step to sending an email, as follows:
  - a. **First time through:** on the [Enrollment] tab, click on the [Reports] icon, then the [Shared] report directory and locate the [Email Filter - Standard Report] (under the [State] folder), click on [Memorize Report] to create a copy in your [Custom] report directory.
  - b. **Subsequent times through:** on the [Enrollment] tab, click on the [Reports] icon, then the [Custom] report directory and locate your copy of the Email filter report.
  - c. Click on [Edit Report]
  - d. Click on [Standard Filters] and/or [Data & Format Options] to create a report that contains the desired members (Youth, Volunteers and/or Contacts) for your email.
  - e. Click on [Save] before leaving any screen.
  - f. Click on [View Report] to ensure that the filters are correctly set.

**Note: Do not worry about filtering for the presence of an email address**

## CREATING THE EMAIL

1. Click on the [Connect] tab, then on [Broadcast Emails], then [Add Broadcast Emails].
2. In the popup window, enter a title for your email—one that will help you identify it. This title will not be your subject line, just an identifier for you.
3. Choose a previously sent email as a template if you so desire.
4. Click [Create Email].



You will then be led through a linear series of screens requesting information and input regarding the email message. The actual email does not get sent until the very end.

### Info screen:

1. The title appears as you typed it above, and can be edited.
  - Send to Members vs. Send to Families: Generally speaking you will want to send your emails to all the possible email addresses. In order to do that, you would choose the following:
    - [Send to Members]
    - [Send to Family, Second Parent/Guardian, and Second Household, etc.]
    - [Send to Emergency Contact] will not include the emergency contacts on the Health info page (this Emergency Contact field refers to a field that we are not using MN).
    - [Send to unsubscribed] is a good option to select, just in case someone has somehow “unsubscribed” (which is different than where they express their correspondence preference).
    - Remove Unsubscribe Link - ALWAYS check this, as we do not allow family to unsubscribe from our emails.
  - If you also desire to send a text message, click on the bottom check box.

A screenshot of a form titled 'Enter an Email Title'. The form has a text input field for 'Email Title' containing the text 'New member email'. Below the input field, there are two radio buttons: 'Send to Members' (selected) and 'Send to Families'. Below the radio buttons, there are several checkboxes, all of which are checked: 'Send To Family', 'Send To Second Parent/Guardian', 'Send To Second Household', 'Send To Emergency Contact', 'Send To Unsubscribed', and 'Remove Unsubscribe Link'. At the bottom of the form, there is an unchecked checkbox labeled 'Send Text Message'. A red arrow points to this checkbox.

2. Click [Continue] to save your settings and go on. (Click [Exit] or [Delete] if you want to back out of the process.)

### Message Settings screen:

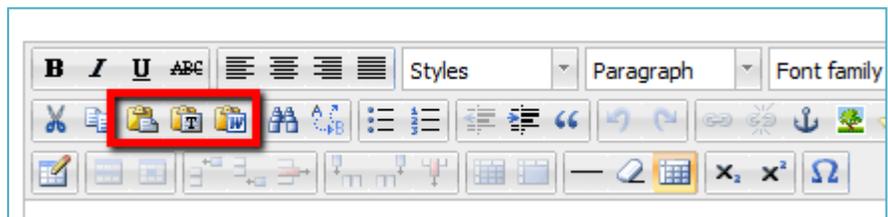
1. Enter the subject line for the email.
2. Use My Email As Reply-To:
  - [Checked] will send the email “from” your email address (ie [staffemail@uidaho.edu](mailto:staffemail@uidaho.edu))
  - [Unchecked] will send the email “from” “no-reply@4-H Online.com” and recipients cannot reply.
3. Click [Continue] to save your settings and go on. (Click [Save], then [Exit] or [Delete] to back out of the process.)

### Email Layout screen:

1. Type your message in the editor window, which is a full featured HTML editor, allowing a variety of formatting options (but please use discretion).
2. While it is often convenient to “Paste” a message into this editor window, the source formatting of that message can sometimes create unexpected and undesired results. It is helpful to note the

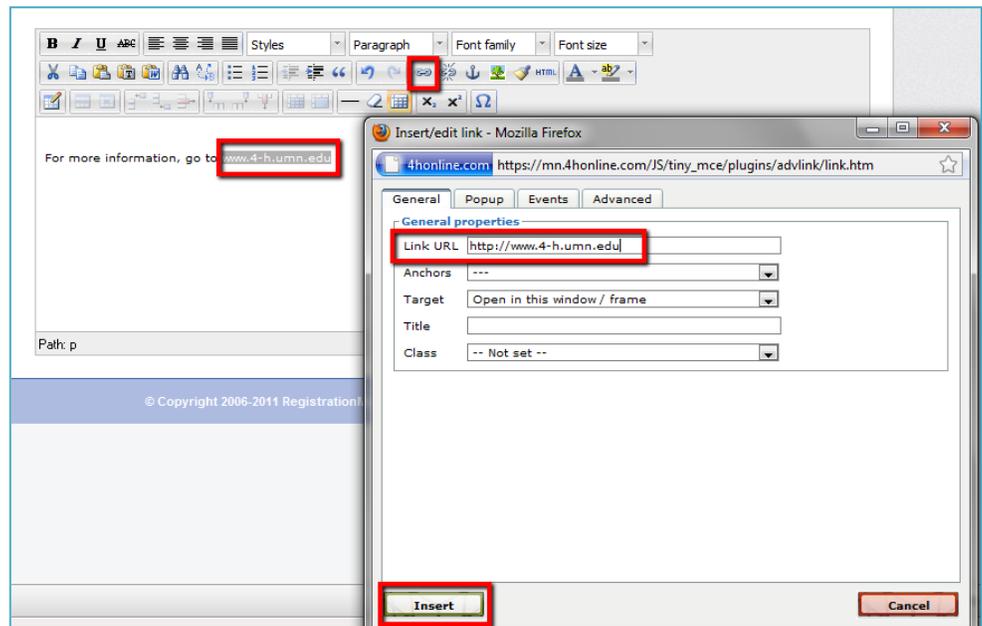
different Paste options:

- The first icon (plain) will be a regular Paste operation and will retain (or attempt to retain) the source formatting.
- The second icon (with the black “T”) will give you a tool to paste plain text, which can then be formatted as desired using the 4-H Online toolbar (this is the often the best approach).
- The third icon (with the blue “W”) will paste text from Word with formatting that is very close to the source formatting in Word.

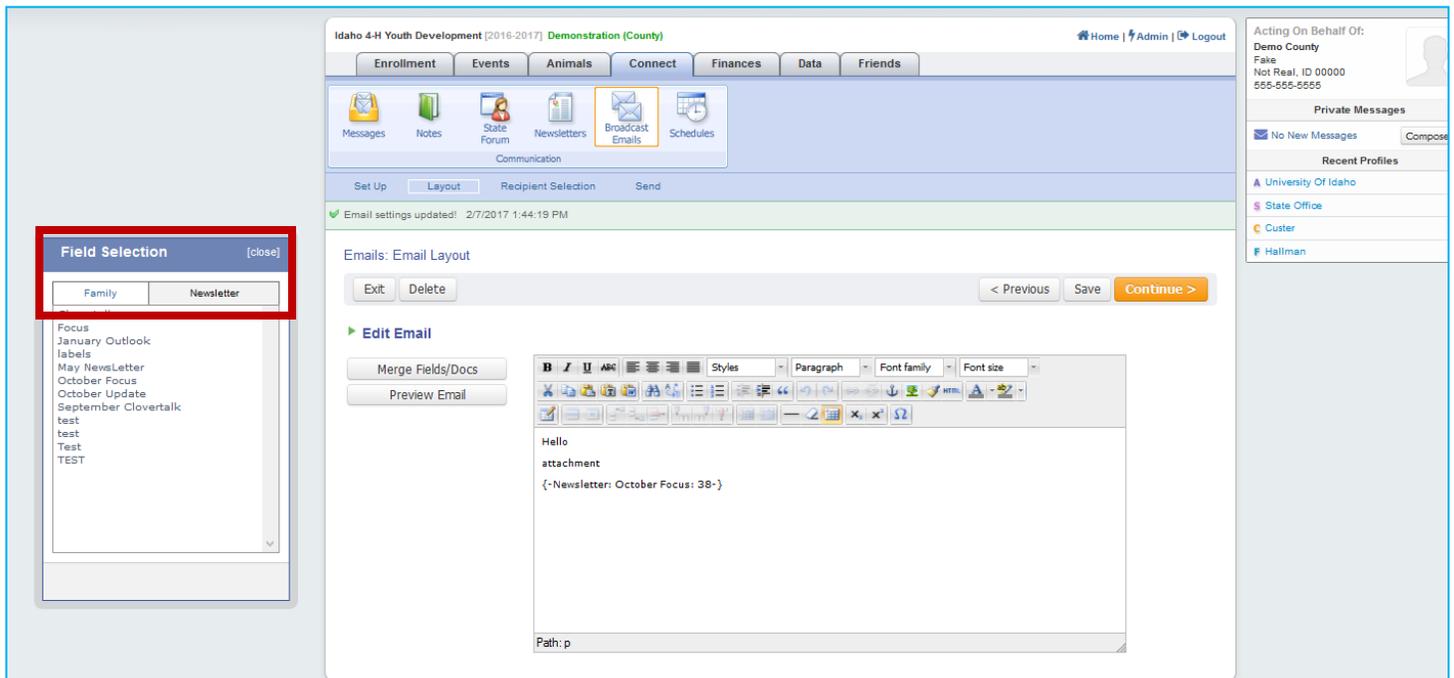


3. To insert a hyperlink in a message:
  - Type the text of the link, which should be the actual link, so that in case the email is printed out, or the “click to” feature is not working on the recipient’s computer, they can type the link manually (ie “<http://www.uidaho.edu/extension/4h>”).
  - Select the desired text

- Click on the [Insert/Edit Link] button
- In the popup window, type the full URL (including the “http://”)
- Click [Insert] to finish creating the link



4. It is possible to add a newsletter or flyer into your email. The item won't be an attachment per say but it will provide a url that can be clicked on. This is a great way to promote activities and events.
  1. Upload the .pdf of the flyer/newsletter as a newsletter



2. In the field selection popup window click 'Newsletter'
3. Double click on the title of the document you want to use (the text will appear in your message as {-Newsletter: Title-})

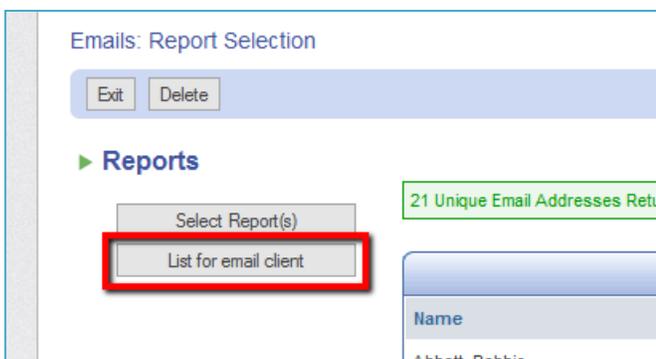
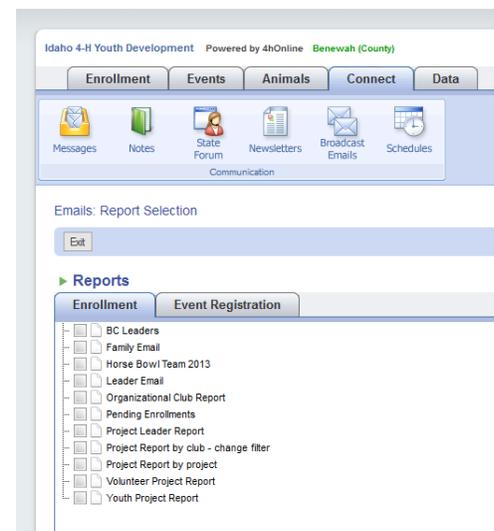
5. It is possible to add “mail merge” data into each email (for example you can add the family name or address into the message). When you first enter the [Email Layout Screen] you may see a the [Field Selection] popup window, or else click on the [Merge Fields/Docs] button.
  - To insert a field, place the cursor in the message at the desired point, and then double-click the desired field as listed in the popup window.
    1. If you selected [Send to Family] back on the first screen, you only see fields that are associated with families.
    2. If you didn't select [Send to Family] you will see fields associated with individual member (youth, volunteer, contact) records.
6. At any time, to see a preview of the email, click on [Preview Email]
  - Click [Send Email to Me] to send a test message to yourself
  - Click [Exit Preview] to return to the [Email Layout Screen]
7. Click [Continue] to save your settings and go on. (Click [Save], then [Exit] or [Delete] to back out of the process.)

### Report Selection screen:

1. Click on [Select Report].
2. This opens [Custom] report directory. Locate the [Email Filtering....] report that you prepared for this message (or the report that you are using as the basis of this email).
3. Click [<< Save].

You'll see a list of who's going to receive the email. The note at the top will tell you the number of unique addresses, but the duplicates will still be listed below.

**Shared Reports are not available for emailing.**



At this point, you have the option of having 4-H Online list the unique email addresses in a list box, so that you can copy-paste them into your regular email client for sending.

**Use the BCC field for sending these messages!**

### List for email client

abcd@gmail.com, noemail@hotmail.com, toddmehr@gml.com, tra  
franc237@umn.edu, toddmehr@zarlog4h.com, marysue2@xts.com  
blue@umn.edu, chri1420@umn.edu, testwsc@gmail.com, new4hfa  
urbanyd@umn.edu, ham@umn.edu, test@zarlog4h.com, holli021@  
artsyacad@school.edu, willowg@redwing.net, newbie@gmail.com,  
ocean@spray.com, diggs2244@gmail.com, sara.janetta@gmail.com

To send the email within 4-H Online, proceed as follows:

4. Click [Continue]

### Delivery Date screen:

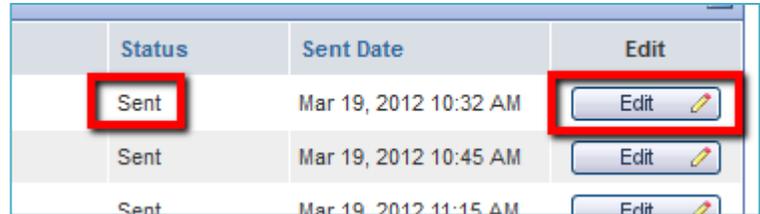
1. Click the [Send Now] checkbox
2. Then click [Finish] - at that point there's no going back.

Your email will be sent to the 4-H Online mail server, and labeled "pending". Within 15 minutes, it will send, and then be marked as having been sent.

You can come back to this screen at any time to view details of how many messages were sent, and an estimate of how many were opened. That is not an exact science, because some email clients do not record messages as opened.

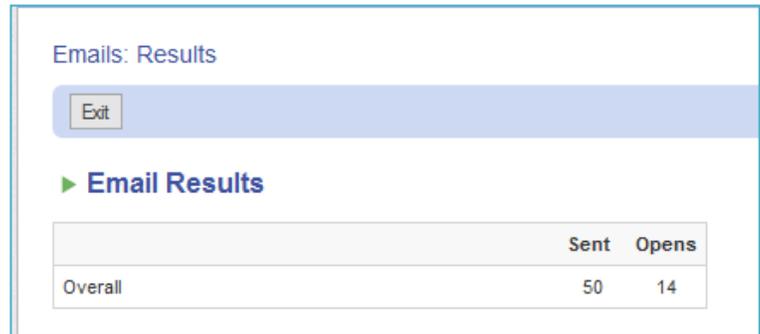
## EMAIL DELIVERY STATUS

When you click on the [Edit] button after sending an email, you will be directed to the [Email Results] screen for that email.



Status	Sent Date	Edit
Sent	Mar 19, 2012 10:32 AM	Edit 
Sent	Mar 19, 2012 10:45 AM	Edit 
Sent	Mar 19, 2012 11:15 AM	Edit 

[Email Results] are displayed for every email sent. Note, however, that the [Opens] is only a general number, not an exact report. This is because the way that 4-H Online detects and reports an “opened” email is by embedding a tiny and invisible image in the email. If the user’s email client then opens the email, it will then download the tiny image, notifying the server that the email was opened and one message is then added to the [Opens] count.



Emails: Results

Exit

► Email Results

	Sent	Opens
Overall	50	14

The problem however, is that most email clients will not automatically download images because it’s a known fact that spammers will use this technique to find out who is reading their spam emails and will then send additional spam their way. In addition, this technique of detecting an opened email is considered an invasion of privacy by some.

Therefore, the best you can interpret from the [Email Results] screen is that your message got “out there” if you see at least one [Opens].

## **GENERATING THE COMPANION MAILING LABELS OR MAIL MERGE DATA**

For members who were included according to the filter criteria (per the report filters in the first step) but do not have an email address, these steps will facilitate a hard copy mailing

1. Click on the [Enrollment] tab, then click on the [Reports] icon, finally, click on the [Custom] report directory and locate your copy of the Email filter report
2. Click on [Edit Report]
3. Click on [Data & Format Options]
4. In the [Custom Filters] section, click on the [Select a field...] dropdown
5. Select [Family: Email]
6. Click on the [Select Operator] dropdown and choose [[] Is Null]
7. Scroll down and click on [Save].
8. Click on [View Report] to ensure desired results
9. Note that you may want to add additional custom filters for [Member: Email] and/or [Member: Second Household Email]
10. Click on [View Report] to ensure that the filters are correctly set
11. Click on either [Family Correspondence] or [Member Correspondence] to generate mailing labels and/or Mail Merge Data. Refer to the Report user guide (very end) for more information about generating mailing label and/or mail merge data.