

Broadcast Emails and Text Messages

Before You Start

The first step in sending email or text messages is to determine WHO is getting the message. There are two ways to do this:

1. Create a custom report that lists all the recipients. For large lists, or for people who have something in common (all beef project members, or all high school youth), a report will be the best option. Reports can be re-used, and each time will return all the current information—if someone new has joined, they will be included.
2. Flag all recipients on the member/leader search screen. For a small list, or for people who may not have an easily-defined common denominator, flagging is fast and easy.

It makes absolutely no difference what fields are included on your report—it does not have to include email addresses. The only important thing is how you set the filters. It's probably useful to have just the name appear, in case you want to double-check who is on the list.

It also does not matter how many times a youth is listed on the report—only one email or text is going to be sent to each unique address, even if the member or family is listed multiple times.

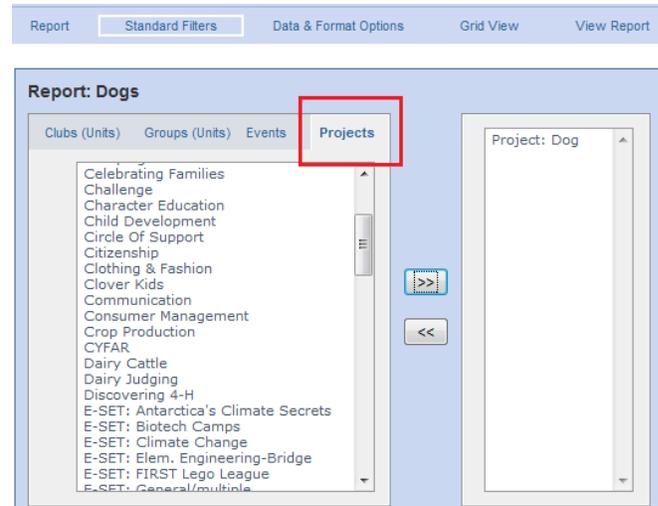
Setting up Reports

It is very simple to set up a one-condition report/filter, and duplicate that for another one-condition. Multiple reports can be linked to one broadcast email, so breaking the filters down to their simplest components can be the fastest way to have a useful, sustainable file of custom reports for broadcast emails.

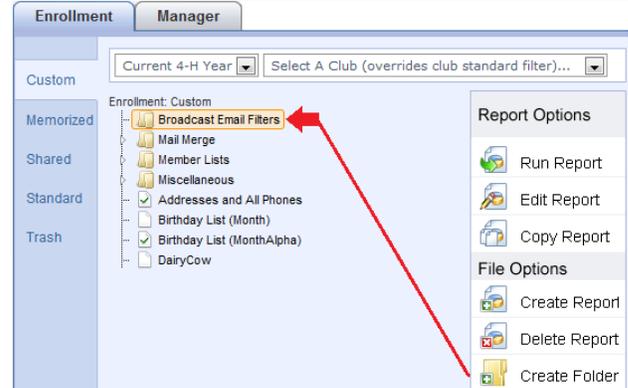
1. Create a custom report, named for the condition/filter on it: Project Dairy Cow or Club Hiland Hijackers for example. (The reason I started them with Project & Club is because they're going to alphabetize inside the folder and I like organization.)
2. The only field you need on the report is probably one of the Full Name fields.
3. Set the standard filter for Project = Dairy Cattle (example). You could also decide you want to limit it to youth-active, or you might set it for youth-adult-active-incomplete-pending... you decide.

Screenshots

(Screen appearance may vary per state)



4. When it's right, save it, and then, back on Custom Reports, Copy it. Rename it to Project Dog (example) and change the standard project filter to be Dogs.
5. Save and Copy again, renaming the copy Club Hiland Hijackers (example). Change the standard project filter to a standard club filter.
6. You can create a lot of these one-condition reports in a very short time. When you're done, create a custom folder, named probably "Broadcast Email Filters" and move all the reports into that.



Broadcast Email (Connect tab)

Click on the Connect tab at the top of the 4hOnline screen, then Broadcast Emails icon, then "Add Broadcast email" link near the upper left.

1. Enter a title for your email—one that will help you identify it. That will not be your subject line, just an identifier for you.
2. Click Create Email.

Setup screen:

1. The title appears as you typed it above, and can be edited.
2. Subject: This will appear as the subject line on the message.
3. Recipients:
 - Send to Families: sends to the family email account—that they log in with.
 - Send to Members: sends to the account associated with the member profile.
 - Send to Managers:



4. Configuration:

- Send to Unsubscribed: Overrides the family's choice to unsubscribe from 4HOnline emails.
- Remove Unsubscribe Link: Sends email with no "click here to unsubscribe" option.
- Use My Email as Reply to: Sends from the manager account creating the email. Otherwise, the email will come from no-reply@4honline.com, which prevents replies.
- Send Text Message: ONLY if text-messaging is selected on the profile screen, and a message is entered on the layout screen.

CONTINUE to save and go on to Layout.

Layout Screen:

Enter the body of your email message. There is a full-featured text editor, but be aware that not all email clients will display the text as formatted.

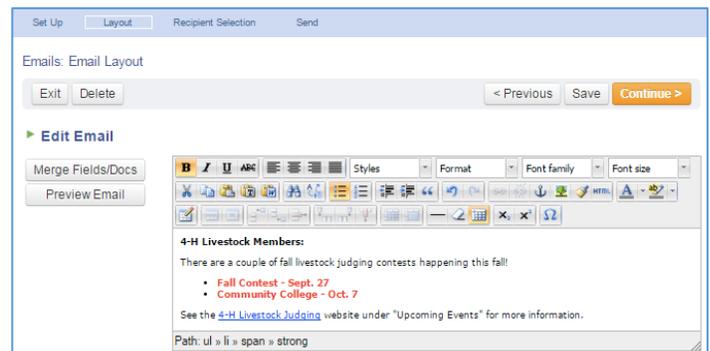
Merge Fields/Docs

Fields: based on your selection of recipients, shows a list of fields that can be merged in to create a more "personal" message. (example: merge in "First Name" after Dear... for Dear John. Be sure to include all spaces and punctuation.)

Docs: newsletters that have been uploaded can be merged into the message, creating a clickable link that goes directly to the uploaded document. (Docs must be PDF, make sure name doesn't include punctuation marks, and upload before starting the email.)

Edit Text Message: If you selected that option on Setup, you have a separate text message box. Limit the message to 160 characters.

Continue or Save to finish later.



Recipient Selection Screen:

The options on this screen will vary, based on your selection of recipients on the Setup screen.

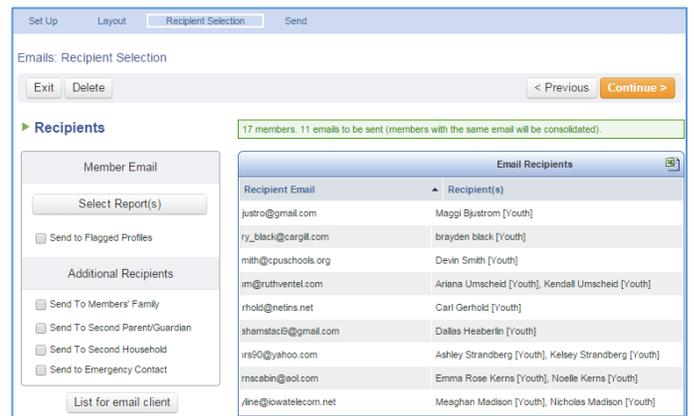
Select Report(s): Shows Custom reports, with a checkbox in front of each report. Click the checkbox to put a green check mark in front the report(s) to be used. Click Save after selecting.

Send to flagged: looks at the Member/Leader search screen to find flagged records instead of using a report.

Additional Recipients: (If Send to Member was selected on Setup screen) Copies of the email are sent to additional recipients as listed.

List for Email Client: Pop-up list of all email addresses to copy/paste into another email client (Outlook, Gmail, etc.)

Continue to send the email.



✿ Tips ✿

To view the status of your email, after it's been sent, click Edit beside it on the Connect>>Broadcast Email screen list. You will see a list of every recipient and the status of the email to that account—delivered, bounced, etc. “Opened” is misleading. If the recipient’s email client automatically downloads images in emails, the message will show as opened. If not, it shows as delivered.

Another way to check whether a specific person received an email is to log into their family, and on the Family Info screen, click Edit Family and then Email History. This is a list of all emails sent to that family, and the status—delivered, etc.

