

CUSTOMIZEABLE EMAIL CENTER

Step by Step Instructions

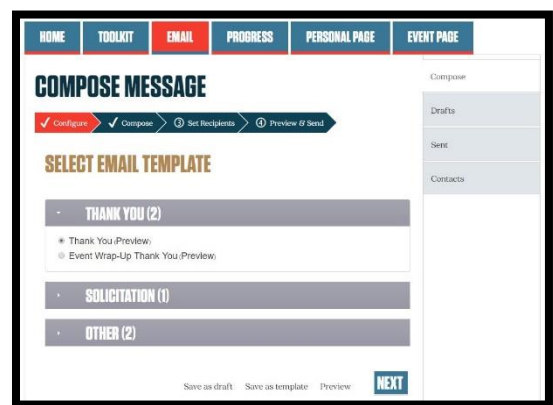
You can easily compose and send email messages from the Email area in your Participant Center. We even offer a variety of templates to help you communicate with your supporters easily and efficiently.

To begin using your Participant Center email, start by clicking on the Email tab in the toolbar at the top of your Participant Center, then follow the steps below:

Configure or Compose an Email

1. Choose a template

- Under the **Configure** tab, you can select one of three templates:
 - **Thank You** – to thank donors for a donation or provide them with a post-event wrap up
 - **Solicitation** – to solicit supporters
 - **Other** – for a blank template on official email stationery and an event reminder template
- Select the template you desire, then click the “NEXT” button at the bottom of the screen.
- You can also save your email as a draft and access it again by clicking on the “Drafts” tab in the menu to the right then choosing the draft you would like to work with.

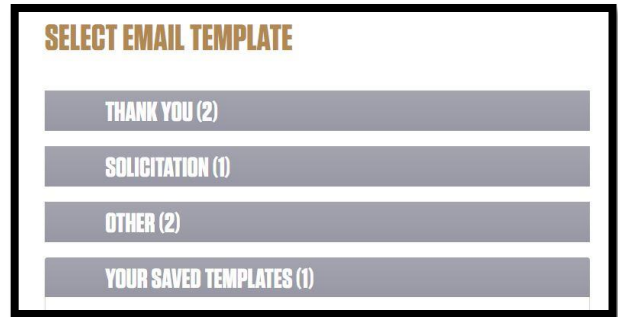


2. Creating a new template

If you would like to create a new template with information specific to your fundraiser, you can easily modify an existing template or create one from scratch, then save the new email as a template for future use. This is an easy way to create a customized solicitation letter or thank you note that you will use many times over during the lifecycle of your fundraiser. Follow these steps to create a template:

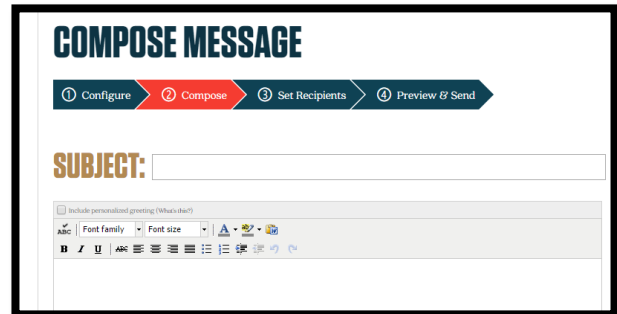
- Under the **Configure** tab, select one of the existing templates to base your new template on, or create an entirely new template from scratch by selecting the blank template option.
- Customize the email to meet your needs.
- Choose “Save as template” from the options at the bottom of the screen.

- This new template will now be saved below the existing templates under a new header named “Your Saved Templates”. You can now make use of this template to send emails in the future.



3. Write your email

- **Subject:** Click into the Subject area and type in the phrase you want recipients to see when they view their email. Your email templates all come with a default subject line which you are welcome to customize to meet your needs.
- **Message Content:** If using a template, customize the content in the body of the message, taking care to replace all of the bracketed phrases, *including the brackets themselves* – for example, if you are going to replace [event name] you must replace both the phrase and the bracket on either side. If using a blank email, enter the desired content in the body field below the toolbar.
- Note that you are not able to paste content from other editors that use their own formatting (such as Microsoft Word) directly into this text box. If you have typed up your content for this section in a program such as Microsoft Word you have two options for importing this content into an email. Option one is to save your Word file as a plain text file and then open and use that content. Alternatively you can copy the content you have prepared in Microsoft Word into the “Paste From Word” box by clicking on the icon (shown here) that appears in the toolbar at the top of the body field, pasting the content you have copied from Word, and clicking “insert”.

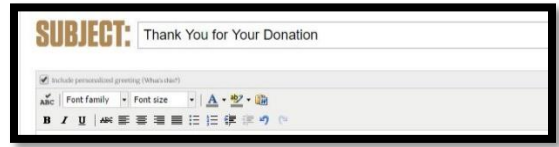


4. Enter your salutation

You have two options for entering the salutation at the beginning of your email:

- If you are sending an email to just one person, you can manually enter the salutation at the beginning of the body of the email, where it says “Dear [Name],”. You will want to replace [Name] with the name of the recipient as you would like it to appear in the email.

- If you are sending one email to multiple recipients at once, you can autofill the salutation by following these steps:
 1. At the top of the toolbar click “include personalized greeting”
 2. If you are using a template, delete “Dear [Name],” from the body of the email.



The salutation “Dear *First Name*” will now be automatically pulled from your contacts and inserted at the beginning of each email you send.

Once you have chosen your template, entered your subject, created or modified your content, and entered your salutation, click the red “NEXT” button at the bottom of the page. If you are not ready to send the email at this point you can also choose “Save as Draft” at any point in the process and return to the task later.

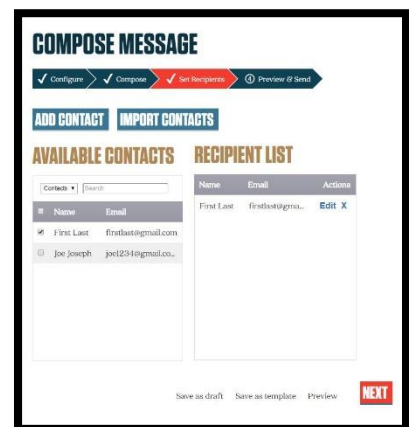


Set Recipients

NOTE: information on adding contacts can be found in the “Add Contacts” section below.

Regardless of whether you add your contacts before you begin the email process or after the email is complete, you will need to choose your recipient(s) from your contact list before sending your email. To set your recipients, follow these steps:

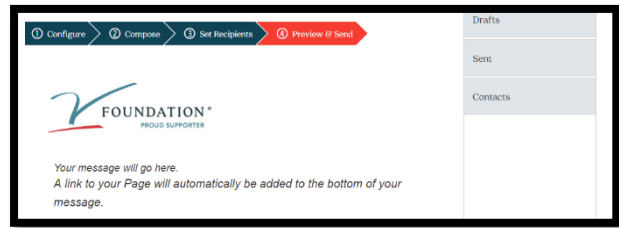
1. From the list of “Available Contacts” select the contact(s) to whom you would like to send the email by checking the box to the left of their name.
2. Once you have selected all the contacts to whom you would like to send your email, click “NEXT” at the bottom of the screen.



Preview & Send Your Email

Preview: Click Preview (from the bottom of the page). A message window opens to display your content as it will look to a recipient. To make changes to the message, click Edit.

Send: To send your email now, click Send. The “Your message was successfully sent” message displays and the fields on this Compose page clear. To save this message and work on it or send it later, click “Save Draft.”



Add Contacts

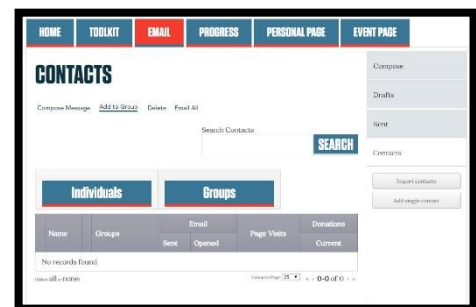
Before you send an email from your participant center, you will need to enter the name and email address of the recipient(s) into your contacts. You can do this before you begin the email writing process laid out above or once the email is complete. *(Please note that the V Foundation does not have access to the contacts you upload into your Participant Center.)*

You can easily add emails addresses from contacts on your personal computer or tablet to populate the “Contacts” section of your Participant Center in one of two ways:

If you are importing or entering contacts independently of creating an email, first select “Contacts” from the menu on the right of the screen, then choose one of the following:

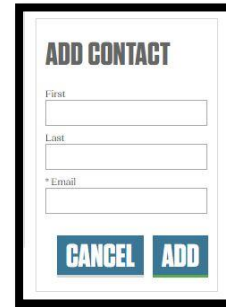
1. Import Your Contacts

- Click “Import Contacts”, which appears as a grey-shaded button below the “Contacts” option you just selected.
- Click the option button for the email application you use and click “Next”.
- Enter the appropriate login information and log into your email account.
- Follow the directions on the page and click “Next”.
- Click “Done.”
- Supported Email Applications include: America Online (AOL), Gmail, Microsoft Outlook or Outlook Express, Plaxo, and Yahoo! Mail.



2. Add Contacts Individually

- Click “Add Single Contact”, which appears as a grey-shaded button below the “Contacts” option you just selected.
- Click into the appropriate field to enter the first name, last name, and email address of the person you are adding and then click “Save.”



A screenshot of a web form titled "ADD CONTACT". It contains three input fields: "First", "Last", and "* Email". At the bottom of the form are two buttons: "CANCEL" and "ADD".

If you are importing or entering contacts after you have completed an email:

1. Import Your Contacts

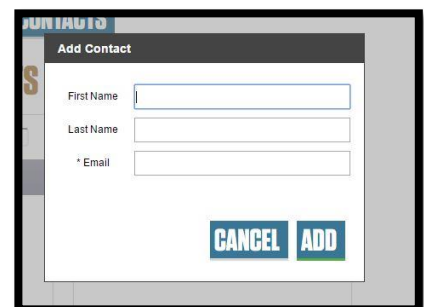
- Click “Import Contacts”.
- Click the option button for the email application you use and click “Next”.
- Enter the appropriate login information and log into your email account.
- Follow the directions on the page and click “Next”.
- Click “Done.”
- Supported Email Applications include: America Online (AOL), Gmail, Microsoft Outlook or Outlook Express, Plaxo, and Yahoo! Mail.



A screenshot of a web interface titled "COMPOSE MESSAGE". It features a navigation bar with tabs: HOME, TOOLKIT, EMAIL, PROGRESS, PERSONAL PAGE, and EVENT PAGE. Below the navigation bar is a progress bar with steps: Configure, Compose, Set Recipients, Preview & Send. There are buttons for "ADD CONTACT" and "IMPORT CONTACTS". Below these are sections for "AVAILABLE CONTACTS" and "RECIPIENT LIST". On the right side, there is a sidebar with links for Compose, Drafts, Sent, and Contacts.

2. Add Contacts Manually

- Click “Add Contact”
- Click into the appropriate field to enter the first name, last name, and email address of the person you are adding and then click “Add.”



A screenshot of a web form titled "Add Contact". It contains three input fields: "First Name", "Last Name", and "* Email". At the bottom of the form are two buttons: "CANCEL" and "ADD".