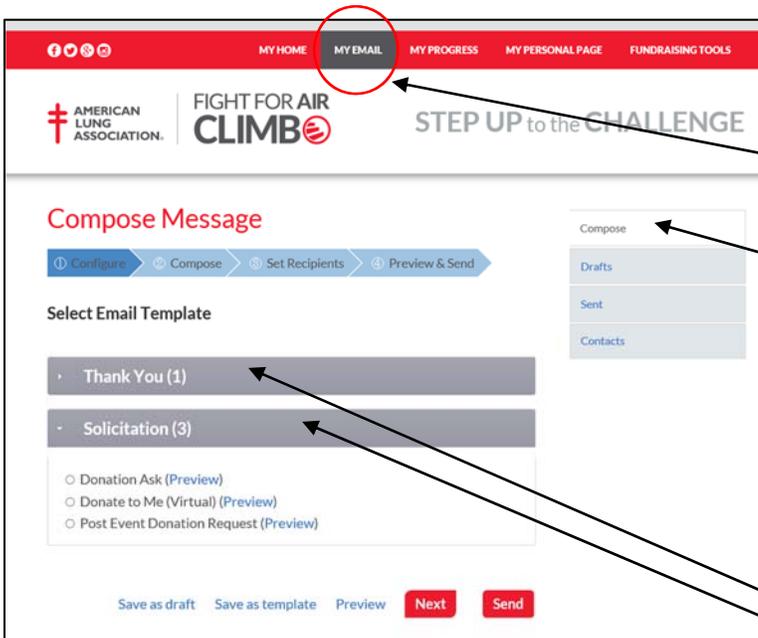




Participant Center My E-mail

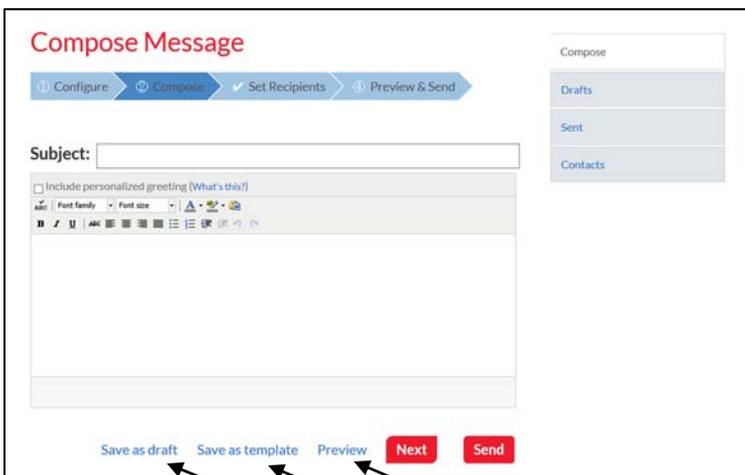
Compose an Email:



Quick Link: Want to start fundraising quickly? Click here to jump straight to your email center!

To send an email click on the Compose Message link in the My Email tab.

You can select a template and choose from a variety of pre-written messages that you can use as-is or customize! (You can also view previously saved templates in this section)



“Save as Template” to save a finished email for reuse from the Template menu.
“Preview” to see what the draft email looks like before you send it.
“Save as Draft” to save your progress and come back to this message later.



Participant Center My E-mail

Participant Center Importing Contacts

Name	Email	Sent	Opened	Page Visits	Donations
Anna Kolleng akolleng.ak@gmail.com		0	0	0	\$0.00

Click on Import Contacts Link in the My Email tab to import contacts quickly.

After clicking on "Import Contacts" from the Email tab, you will choose to import your contacts from Gmail, Yahoo or another email client. Make your choice and click Next. You will now be prompted to provide consent for Convio to access your online address book. After allowing access, you will choose to import "all" emails or "some" emails. If you choose some, you will choose each contact individually.

Import Contacts

- Select Source
- Retrieve Contacts
- Select Contacts
- View Results

Select an Import Source (Tell me more)

Importing contacts from other email services into your Participant Center Address Book makes it easy to solicit donations, monitor who responded, and follow up with personal thank you notes.

Let's begin by identifying where you keep your address book.

You can import contacts directly from an email service below:

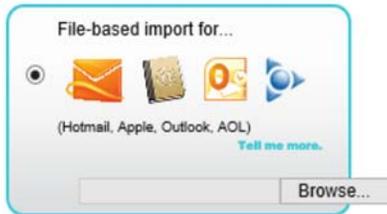
- Gmail
- YAHOO!



Participant Center My E-mail

If you choose to import a .csv file:

OR you can upload a .csv file exported from another email client:



If you choose to import a .csv file, browse your files to find the exported address book and click "Next." (You will need to export your address book to a CSV file first)
Click the "Tell me more" link to see exact step-by-step directions for each file type.
Click "Next" to upload your contacts.

	A	B	C	D	E	F
1	First	Last	Email			
2						
3						
4						
5						

CSV File Header: The Upload CSV option will require you to create a generic CSV file with the headers of: "First", "Last", and "Email". This format is recommended if your offline contacts are stored in a format not available in the drop down mentioned above. Set up your excel file to look like the example below and save as a CSV file to use this feature.



Participant Center My E-mail

Send an Email:

Available Contacts

Contacts

Search

Name	Email
<no na...>	cueliar784@g...
<input checked="" type="checkbox"/>	Ddestefano87...
<input checked="" type="checkbox"/>	Ellen@citystaf...
<input type="checkbox"/>	ellie.dolan@ex...
<input type="checkbox"/>	emilygilley@m...
<input type="checkbox"/>	employment@...
<input type="checkbox"/>	erestrepo@vik...

Recipient List

Name	Email	Actions
<no na...>	anna.kollen...	[Red icon]
<no na...>	Beth.Jense...	[Red icon]
<no na...>	Ddestefan...	[Red icon]
<no na...>	Ellen@citys...	[Red icon]

Save as draft Save as template Preview Next Send

Start by typing your contact's name in the "To" field and it will automatically pull up the matching contacts from your contact list.

Participant Center Updating Contacts:

Use the check boxes next to each name to add multiple contacts to a group at once, select multiple contacts to email or to delete multiple contacts at once.

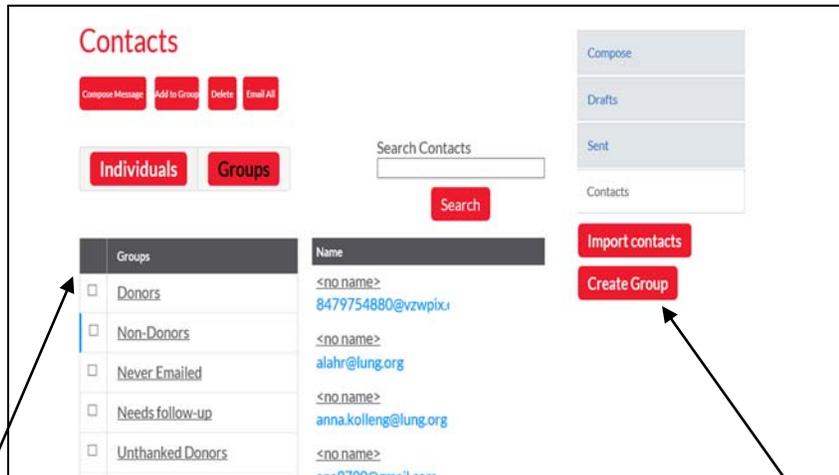
Name	Email		Page Visits	Donations Current
	Sent	Opened		
<input type="checkbox"/> <no name> 8479754880@vz	0	0	0	\$0.00
<input type="checkbox"/> <no name> alahr@lung.org	0	0	0	\$0.00
<input type="checkbox"/> <no name> anna.kolleng@lur	0	0	0	\$0.00
<input type="checkbox"/> <no name> apa9790@gmail.c	0	0	0	\$0.00

You can see how many emails you sent to each contact, if the email was opened, if your contact visited your page, and if they made a donation.



Participant Center My E-mail

Click on the group name to see the contacts in this group. Edit the group name by hovering over it and clicking "edit". To delete the group, check the box beside your custom group and use the delete button at the top of the page to completely remove it.



Some groups are already created for you: Donors, Non-Donors, Never Emailed, Needs Follow-Up and Unthanked Donors.

To remove a person from a group:

Click on the group, scroll to the right, and then click on the minus sign next to the person's name.

To add a person to a group:

go to "Individuals" tab, click on the person's name, select "Add to Group", and then pick the existing group or create a new one to add the person to.

To create a new group, click the "Create Group" link and name your group. Then go through and select contacts to add to your new group.