

Email Families

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Watch a (3:29) video tutorial on Emailing Families, Students, Classes or Instructors

From the *Families* menu you can use **Email/Text Families** to create an email to a group of families/contacts/students/staff (instructors).

1. Point to *Families* in the menu bar and click **Email/Text Families**.
 2. In the *Message* section select an **Email Template** if applicable.
 3. Choose a **Type** (Email - HTML or Email - Plain Text Email) and enter an **Email Subject Line**.
 4. Enter the message body or edit the template body if needed.
 5. Click **Attach File**, **Insert Image**, or **Choose from Dropbox** to attach files and add images if needed.
See [Email Attachments and Images](#) for more details.
 6. Use the *Enrollment Status*, *Family/Student Search Criteria*, and *Class Search Criteria* sections to select who to send the email to. There are many ways to select groups of families for emailing.
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Search Criteria (Who do you want to email?)

Enrollment Status

Family
 Family Status: Active

Students
 Student Enrollment Status: Currently enrolled
 Include waitlisted students: No
 Include future enrollments: No
 Include future drops: Yes

Family/Student Search Criteria

Family Location: [Dropdown]
 Membership Type: [Dropdown]
 ePayment Method: [Dropdown] ePayment Schedule: [Dropdown]
 Has missing or expired credit card: No (If "Yes", only applies to families with ePayment Method = Credit Card and includes cards expiring within the next calendar month)
 Registration month: [Dropdown] (Callout: Use the Registration criteria to send Anniversary emails!)
 Registration Date from: mm/dd/yyyy through mm/dd/yyyy
 Source: [Dropdown]
 Balance from: [] to: []
 Has not agreed to Policies since: mm/dd/yyyy
 Include Problem Accounts: Yes
 Student Age from: [] through [] Student birth month: [Dropdown] Student Gender: [Dropdown]

Class Search Criteria

Class Location: [Dropdown]
 Class Session: [Dropdown]
 Category 1: [Dropdown] Category 2: [Dropdown] Category 3: [Dropdown]
 Primary Instructor: [Dropdown]
 Class meets: Mon Tue Wed Thu Fri Sat Sun

 Classes (select one or more) Select one or more classes by holding the CTRL key. Individually selected classes will not be included if they do not meet other selected criteria.
 Adult Judo (2019 Spring)
 Adult Judo (2019 Summer)
 Adult Judo (2019 April Testing)
 Adult Judo (2019 Summer MIAMI)
 Advanced Tumbling (2019 Summer MIAMI)
 Advanced Tumbling (2019 Summer MIAMI) [More...](#)

(Callout: Leave Class Search Criteria open (as defaults) to capture families regardless of their students' enrollment.)

7. In the *Recipients* section select the **Send Message To** from several combinations of contacts, students and/or instructors. Emails will be sent to your selection based on the *Search Criteria* chosen above.
8. Select whether or not you wish to **Include Mass Email Opt-out**. The default is set to *No*, however, there may be instances where you need to contact all families to notify of a closure or other non-marketing related information.
9. If you have text messaging activated in your database select the applicable drop-down for **Include Text Opt-In**. By default this is set to *All*.
 Set this to *Not Opted-In* if you have already started the **Opt-In Contacts & Students for Texting** and want to send emails to families who have not yet opted in for texting.
10. Add a reply email address in **Email Replies Sent To**. This email will automatically be sent a copy of the email. **Note: User ID (Tools > Edit Settings > Manage Users and Permissions) and Location (Tools > Edit Settings > Locations) email addresses are listed.**
11. Select addresses to **Send Additional Emails To**. **Note: User ID (Tools > Edit Settings > Manage Users and Permissions) and Location (Tools > Edit Settings > Locations) email addresses are listed.**
12. Click **Preview Email List**.

13. In the preview, clear the checkbox for any families you want to omit. You can clear the **Check All** header checkbox to remove every email address and then select only specific families. This is useful if you need to send a mass email to a group of email addresses that don't meet any specific criteria. Leave the *Search Criteria* wide open to list every family, clear the **Check All** header checkbox, and then select only the email addresses you want to send.

Click **Send Now** to send the email right away or select **Send Later** to schedule the email to be sent at a later time. See the section [Schedule an Email](#) for more information.

Preview

← RETURN
SEND NOW
SEND LATER
?

Results

Deliver To: Contacts and Students
 Email Replies Sent To: asmith@jackrabbittech.com
 Subject: Weather Closing
 Message: [Show Message](#)
 Message Length: 255

Click to see body of email

Matched Recipients

View 1 - 45 of 45
Print
Export
Refresh

Type	Acct/Family Name ¹	Balance	Name	Email	Check All <input checked="" type="checkbox"/>
Contact	Ager	0.00	Barbara Ager	thisfamilysemail@gmail.com	<input checked="" type="checkbox"/>
Contact	Anderson	0.00	Christopher Anderson	christopher@email.com	<input checked="" type="checkbox"/>
Contact	Anderson	0.00	Lisa Anderson	lisa@email.com	<input checked="" type="checkbox"/>
Contact	Barker	0.00	Kimiko Barker	kbarker@email.com	<input checked="" type="checkbox"/>
Contact	Black	0.00	Clifford Black	clifford@email.com	<input checked="" type="checkbox"/>
Contact	Black	0.00	Valerie Black	valerie@email.com	<input checked="" type="checkbox"/>

Clear the Check All box to clear all selections. Then you can pick and choose which emails to send!



Emails sent to contacts and students will be retained in the family email history for 365 days (Misc tab > [View Sent Emails](#)).