Email from Reports

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Jackrabbit has made emailing different groups of people even easier by allowing you to generate an email directly from several reports! In the report results checkboxes allow you to select which families to email and an *Email* button opens up an editor where you can create your email.

To send an email from a report grid:

- In the report results use the checkboxes to select which families to send the email to or select Email All to send to all email addresses.
- 2. Click Email to open the email editor.

| Jackro | abbit | Aged | Accounts (> 9 | 0 Days) Re | port | | | |
|-----------------|--------------------|-------------------|------------------------|--------------------|---------------|-----------|---------------|----------|
| Return ■ Email | | | | ? H | | ? Hel | Ip 🕴 Send Ide | |
| 🖴 Print 🛛 | ් Export Ø Refresh | 10 columns hidden | Show/Hide Columns | Save Columns 2 Res | store Columns | | | |
| Loc | Family/Account | Billing Contact | Billing Email | Home Phone 🗢 | Students | > 90 Days | Balance | Email Al |
| JRHC | Clements | Alane Clements | aclements@email.com | (704) 555-0100 | Heidi | 95.00 | 95.00 | |
| JRHC | Evans | Danielle Evans | devans@email.com | (704) 555-0328 | Brody | 50.00 | 50.00 | |
| JRHC | Kirkpatrick | Sara Kirkpatrick | skirkpatrick@email.com | (704) 555-1188 | Jenny | 892.25 | 892.25 | |
| JRHC | Harding | Lee Harding | Iharding@email.com | (704) 555-1212 | Coreen | 125.00 | 125.00 | |

- 3. Select an Email Template if applicable.
- 4. Choose a Type (Email HTML or Email Plain Text Email).
- 5. Enter an **Email Subject Line**.
- 6. Enter the message body or edit the template body if needed.
- 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.
- 8. Choose whether or not you want to include email addresses that have been opted out.
- Add a reply email address in Email Replies Sent To. This email will automatically be sent a copy of the email. Note: User ID and Location email addresses are listed (Tools > Edit Settings).
- 10. Click Preview List.
- 11. In the preview, clear the checkbox for any families you want to omit. You can clear the CheckAll header checkbox to remove every email address and then select only specific families.
- 12. 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 our Help article **Schedule an Email** for more information.



A copy of the email is retained in the family record *Misc* tab > View Sent Emails) for 365 days.