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 check boxes 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:

- 1. In the report results use the check boxes 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.

Jackrabbit Aged Accounts (> 90 Days) Report								
Return Semail Se						? Help		Send Idea
Print	r Export ∲ Refresh	10 columns hidden	Show/Hide Columns	Save Columns 2 Rest	tore Columns			
Loc	Family/Account	Billing Contact	Billing Email	Home Phone 🗢	Students	> 90 Days	Balance	Email All
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	<u>125.00</u>	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.
- 7. 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.
- 9. 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 check box for any families you want to omit. You can clear the **Check** All header check box 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 180 days.