## Understanding Email Filters

The best way to segment the audience of an email is to utilize the built in email filters. Some of the pre-set groups in the EMC have additional filters for segmentation and some do not. Before making a choice of which group is best suited, it's helpful to know all the filters available with each selection.

When selecting the Email Audience in the EMC there are five options to choose from:

- **Current Participants**
    - Additional Filters Available – see options below
- **Previous Participants**
    - Additional Filters Available - see options below
- **Current Donors**
    - No additional filters available
- **Previous Donors**
    - No additional filters available
- **Groups Created by Event**
    - No additional filters available

Only one option can be chosen. To select multiple groups (donors and participants together) or an uploaded group, choose *Groups Created by Event*.

Note: If this is the first year for an event, the Previous Participants and Previous Donor options will not appear.
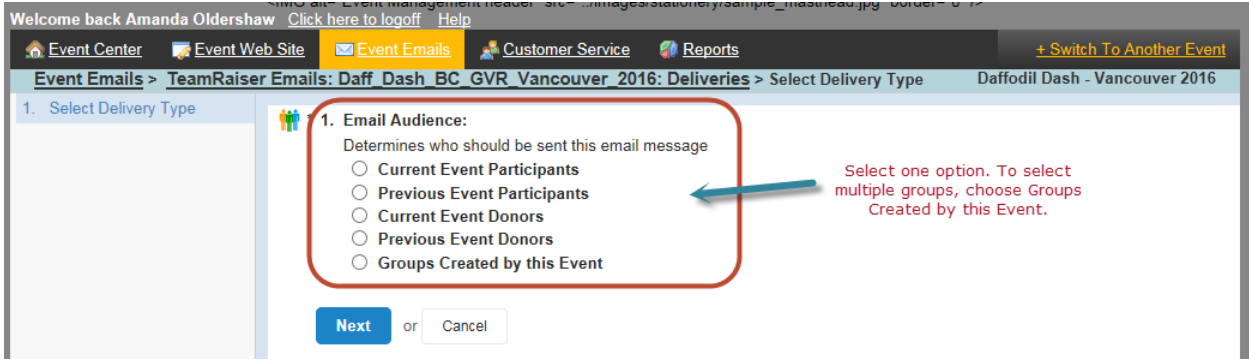
Current Event Participants
The following filters are available when the *Current Participants Group* is selected.

Select Registration Filters
- Previous Event Participation Filter
- Online/Offline Registration Filter
- Date Range

More *Registration based* filters are available when the *Configure Additional Filters* is clicked, under Related Actions
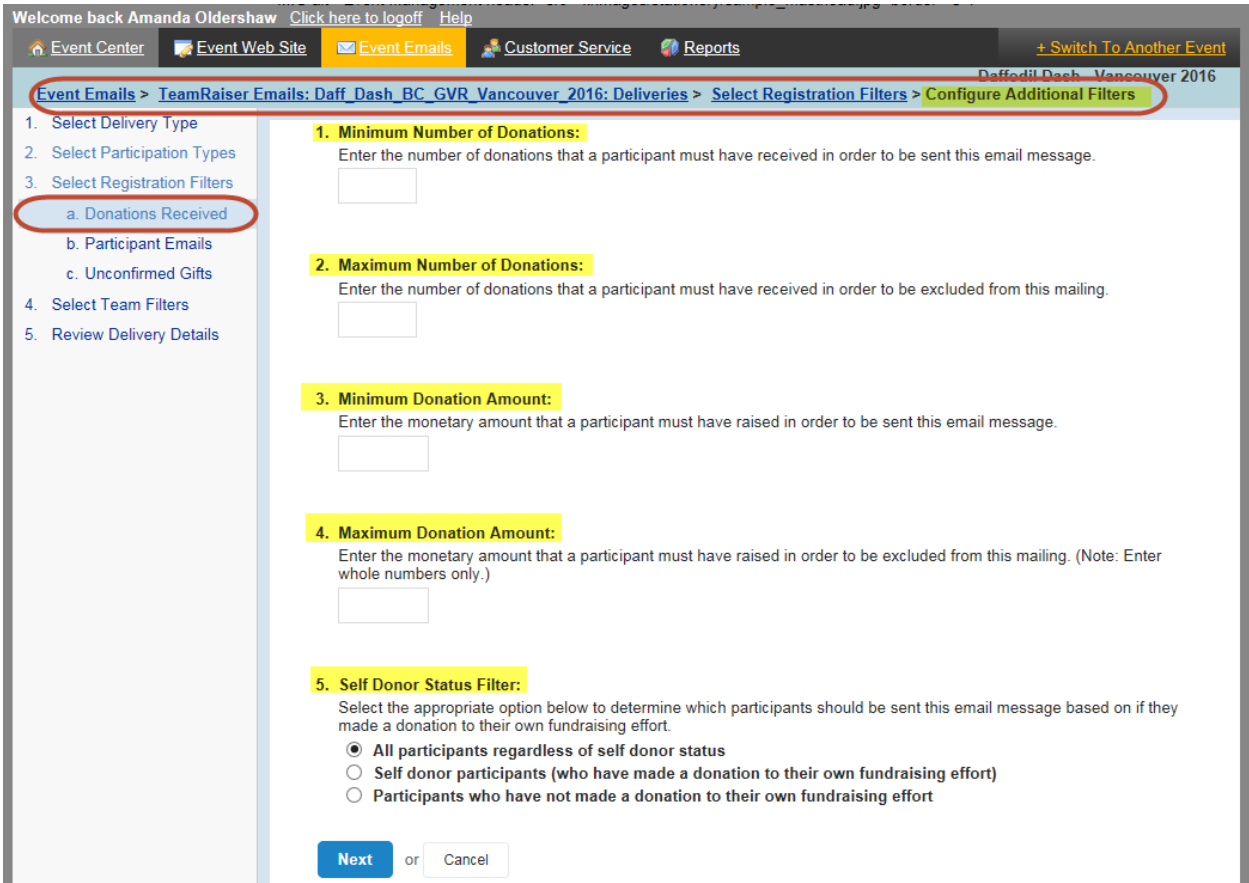
Under Configure Additional Filters

These filters are useful when segmenting out $0 Fundraisers to encourage them to start their fundraising, or sending a special stewardship/thank you email to participants who have reached a specific fundraising amount and/or who have made a self-pledge.

a. Donations Received
- Minimum Number of Donations
- Maximum Number of Donations
- Minimum Donation Amount
- Maximum Donation Amount
- Self-Donor Status Filter

Welcome back Amanda Oldershaw Click here to logoff   Help

Event Center   Event Web Site   Event Emails   Customer Service   Reports   + Switch To Another Event

Daffodil Dash - Vancouver 2016

Event Emails > TeamRaiser Emails: Daff_Dash_BC_GVR_Vancouver_2016: Deliveries > Select Registration Filters > Configure Additional Filters

1. Select Delivery Type
2. Select Participation Types
3. Select Registration Filters
   a. Donations Received
   b. Participant Emails
   c. Unconfirmed Gifts
4. Select Team Filters
5. Review Delivery Details

1. Minimum Number of Donations:
Enter the number of donations that a participant must have received in order to be sent this email message.

2. Maximum Number of Donations:
Enter the number of donations that a participant must have received in order to be excluded from this mailing.

3. Minimum Donation Amount:
Enter the monetary amount that a participant must have raised in order to be sent this email message.

4. Maximum Donation Amount:
Enter the monetary amount that a participant must have raised in order to be excluded from this mailing. (Note: Enter whole numbers only.)

5. Self Donor Status Filter:
Select the appropriate option below to determine which participants should be sent this email message based on if they made a donation to their own fundraising effort.
- ◉ All participants regardless of self donor status
- ○ Self donor participants (who have made a donation to their own fundraising effort)
- ○ Participants who have not made a donation to their own fundraising effort

Next   or   Cancel

To target $0 fundraisers:
- Maximum Donation Amount = 1
  - This will exclude anyone who has raised more than $1 leaving only the $0 fundraisers in the group.

To target fundraisers who have collected some donations:
- Minimum Donation Amount = 1
  - This will include anyone that has raised more than one dollar - excluding all the $0 fundraisers from the group.

These would be audiences used in two separate emails with different messages.

These filters are useful to target and coach participants who have not sent any fundraising emails for their Participant Centre. This filter may be used in conjunction with $0 fundraiser filter on the previous page to target $0 Fundraisers who have not sent any fundraising emails.
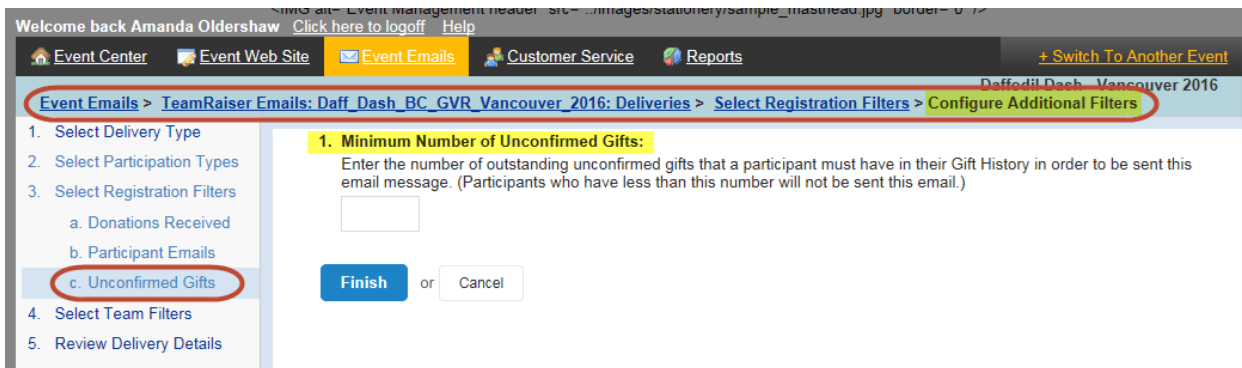
b. Participant Emails
- Minimum Number of Emails Sent by Participant
- Maximum Number of Emails Sent by Participant
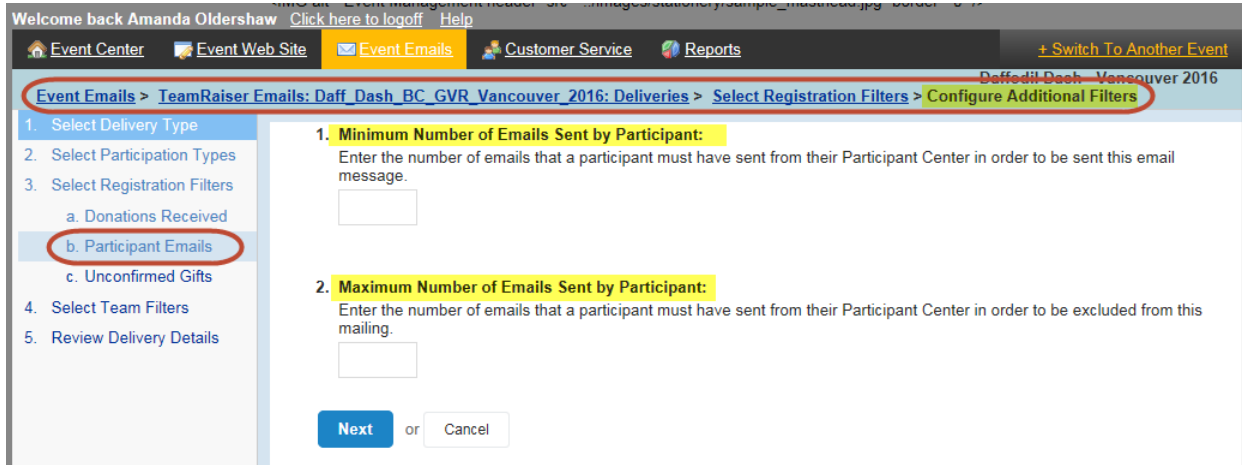
c. Unconfirmed Gifts
- Minimum Number of Unconfirmed Gifts

Note: *This is not applicable in BCY as ALL offline donations are entered as Unconfirmed Gifts*

These filters are useful to segment the group further based on participation role, such as team captains, individual participants, or participants associated with a specific company.

Select Team Filters
- Team Membership Filter (select all that apply)
- Company Affiliation Filter

More **Team Based** filters are available when the **Configure Additional Filters** is clicked, under Related Actions
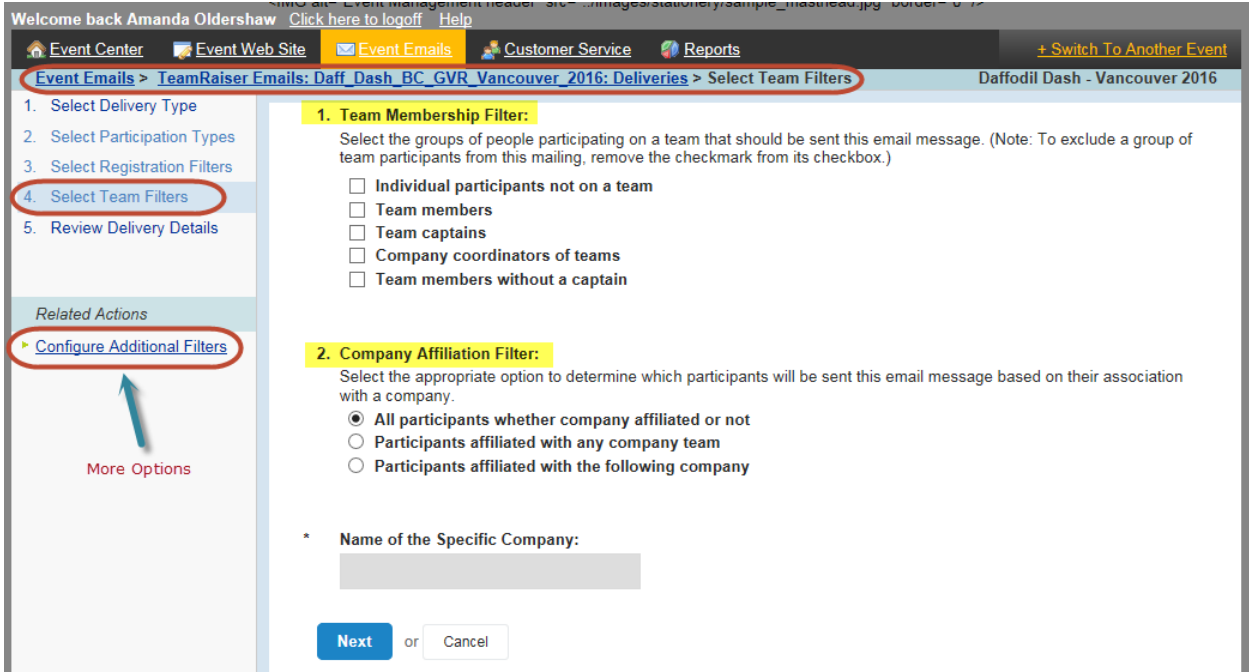
Note: *The Additional Filters for the Team Filters are the same as the Registration Filters.*

Previous Participants

The following filters are available when the **Previous Participants Group** is selected.

Filters available based on:
- All previous participants, regardless of current registration.
- Participants (on a team) who registered last year, but not yet this year.
- Team Captains who registered last year, but have not registered yet this year.

Current Donors
- There are no additional filters available for this group.

Previous Donors
- There are no additional filters available for this group.

Groups Created by Event
- There are no additional filters available for this group.

Note: *Additional groups (such as past participants from more than one year ago) can be imported into the EMC and be made available through the Groups Created by Event category.*

To have an additional group added to the EMC:
- Create an excel list (or .csv) including First Name, Last Name and Email.
  - This list can be generated by running participant reports from past years.
- Check the list for duplicate participants and emails. Edit as required.
  - Convio will not de-dup multiple email addresses. The system logic is set to send one email only per constituent. If multiple constituent records have the same email address, that email address will receive the email numerous times, addressed to each of the individual constituents.
- Send the finalized list to digital@cancer.ca

Once the list has been imported it will be available in the *Groups Created by Event* category.

Note: *The system will automatically filter out any participant who has previously opted out of receiving email.*