

Scheduling Emails in Certain

In Certain Platform, you can schedule emails to be sent to a filtered set of registrants at a later date. This document explains how to do that, using the **Promote > Communication > Email Templates** page (the same place you set up other email templates to use for *non*-scheduled emails).

You can schedule emails to be sent at:

1. a selected number of months/days/hours before or after the event's **Start Date**, or
2. a selected number of months/days/hours before or after the event's **End Date**, or
3. a specified date and time.

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Enabling Scheduled Emails

For an Event

The Scheduled Emails feature is enabled for all Certain accounts. To enable it for an event, follow the steps below. (**Note:** It is not enabled automatically for new events.)

1. In the event, go to Plan > **Settings > Options**.
2. Under **Functional Areas Needed by This Event**, select the **Scheduled Emails** check box under the **Event Module**.

Setting up a Scheduled Email

Communication > Email Templates

You schedule an email in the same place you set up any other email templates: in the event, go to **Promote > Communications > Email Templates**.

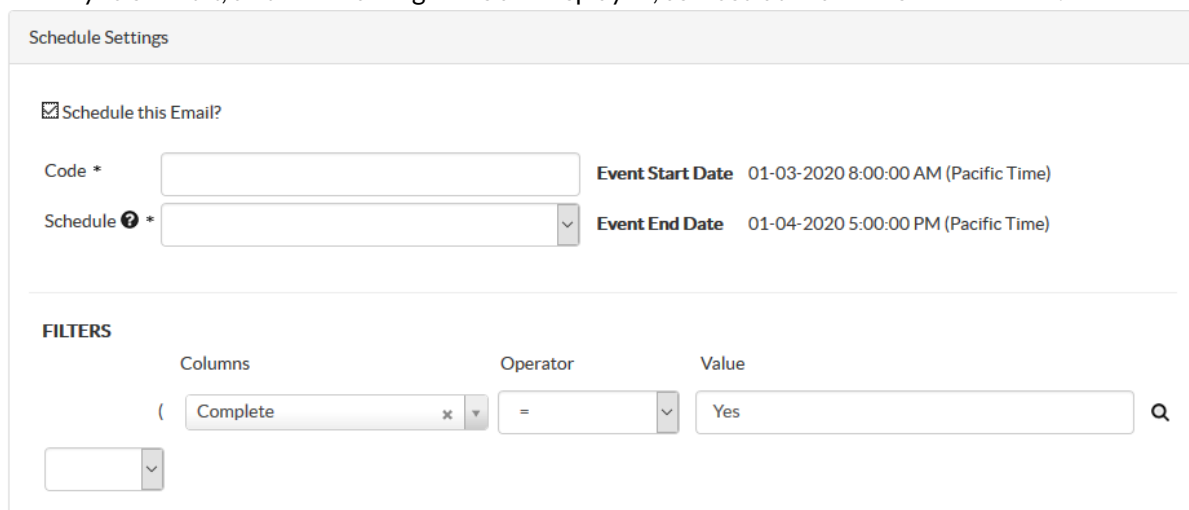
Set the email up as you would normally, with a **Subject** and **Body** (including dynamic data fields), and so on.

If the Scheduled Emails sub-module has been enabled, as described above, then the last section on the **Email Templates** page is the **Schedule Settings** section, in which you can choose to schedule the email, and configure its schedule details.

Schedule Settings

When you are adding a new template, the **Schedule Settings** section consists of just a **Schedule this Email?** check box.

When you select it, all the remaining fields are displayed, as illustrated and described below.



The screenshot shows the 'Schedule Settings' form. At the top, there is a checked checkbox labeled 'Schedule this Email?'. Below this are two rows of fields: 'Code *' with an empty text input, and 'Event Start Date' with the value '01-03-2020 8:00:00 AM (Pacific Time)'; 'Schedule ⓘ *' with a dropdown menu, and 'Event End Date' with the value '01-04-2020 5:00:00 PM (Pacific Time)'. Below these fields is a 'FILTERS' section with a table-like structure. The table has three columns: 'Columns', 'Operator', and 'Value'. The first row contains '(Complete x', '=', and 'Yes'. There is a search icon to the right of the 'Value' field. Below the table is a dropdown menu.

- **Code** – (Required) This must be unique within the event. It is used to track the individual emails sent in the scheduled email.
- **Schedule** – (Required) Select one of the five options.
 - Before Event Start Date
 - After Event Start Date
 - Before Event End Date
 - After Event End Date
 - At a specified time and date

If you select one of the first four options, three extra fields are displayed, for you to specify the number of Months, Days, and Hours to be added to or subtracted from the event start date or end date.

Schedule Settings

Schedule this Email?

Code *

Schedule ⓘ * Before Event Start Date

Months Days Hours

Event Start Date 01-03-2020 8:00:00 AM (Pacific Time)

Event End Date 01-04-2020 5:00:00 PM (Pacific Time)

Scheduled Date 01-03-2020 8:00:00 AM (Pacific Time)

If you select the fifth option, **At a specified time and date**, two extra fields are displayed in which you specify that date and time.

Schedule this Email?

Code *

Schedule ⓘ * At a specified time and date

(8:00 AM Pacific Time)

Event Start Date 01-03-2020 8:00:00 AM (Pacific Time)

Event End Date 01-04-2020 5:00:00 PM (Pacific Time)

Schedule Date (Pacific Time)


Note: The **Schedule Date** is in the **Time Zone** specified for the event on **Event Setup > Details**.

Filters

Under **FILTERS** at the end of the **Schedule Settings** section, you define the filter to be applied to determine the registrations to which the scheduled email will be sent. Select a value in each of the three fields to build a simple filter. (The default is "Complete = Yes", so that the email would be sent to all complete registrations.) Optionally, you can then add one or more extra conditions to build a more complex filter.

FILTERS

(Complete = Yes

- **Columns** – Select the column (field) to be evaluated. The list from which to choose is a long one, including (standard and custom) profile fields and registration fields, event fields, etc.
- **Operator** – Select the operator to apply to that column, for example "=" or "contains".
- **Value** – Enter the value to be compared. For some columns, a magnifying icon  is shown, which you can click to display a Pick List from which to select a possible value. (For example, if the Column is "Complete", the list of values is "No", "Yes", and "Null".)

Optionally, select **and** or **or** to add further conditions to the filter. Just like when you configure advanced filters in a custom report, you can mix these conjunctions with or without parentheses. For example, "A **and** B **and** C **and** D", or "(A **or** B) **and** (C **or** D)".

Seeing What Emails Have Been Scheduled

To see a list of the emails that have been scheduled (and potentially delete any from the queue, or see the recipients of any completed ones), go to the **Promote > Communication > Scheduled Emails**.

Communication > Scheduled Emails

This page displays a **List of Active Scheduled Emails**. The details shown for each one include the email **Template** name, the **Code** identifying the scheduled email, its **Date Scheduled**, who it was **Scheduled By**, and these two columns:

Status – The current status of the email, e.g. "Queued" or "Complete".

Action – Click  to delete a queued email, or  to see a list of the recipients of a completed one.

Tips and Tricks


Editing or Rescheduling a Scheduled Email

To change a scheduled email, even its **Scheduled Date**, go to **Communication > Email Templates**, where you can edit it. It will already be in the schedule queue, and if you change the schedule settings that will alter the existing job. The changes to the **Scheduled Date** are seen in **Communication > Scheduled Emails**, described above.

If you are editing an existing scheduled email that has already been sent and has a status of *Complete*, the **Schedule this Email?** check box be *cleared*. It will; not be resent unless you select the check box.

Copying Email Templates

An email template can only be scheduled once, but it can be copied. So although there is no concept of "recurring" scheduled emails, you can schedule an email template to be sent more than once by making a copy and scheduling the copy to be sent at a later date/time.

Go to **Communication > Email Templates** and click  (**copy**) in the **Action** column for the original template in the **List of Email Templates**, to make a copy.

Giving the new copy a **Name**, change its **Code** (under **Schedule Settings**), and edit the Schedule Settings as necessary.

Changing the Start or End Dates of an Event

If the start or end date/time of an event is changed (in **Event Setup > Details**), then any scheduled emails based on that date are automatically rescheduled accordingly. For example, if an email is scheduled to be sent three days before the event's start date, then its **Date Scheduled** will now be three days before the *new* start date.

Copying an Event

If you copy an event that includes scheduled emails based on the event start or end dates, the new event includes copies of those emails, but they have an “**On Hold**” status. You need to click that to change it to “**Queued**” to send the emails.

Deleting an Event

If you delete an event that includes scheduled emails, the status of those emails is set to “**On Hold**”. If the email was still relevant, you could click its status and change it to “**Queued**” to send it.

Knowing that Emails have Been Sent

The user that schedules an email receives a confirmation email when the scheduled email has been sent. That includes the number of emails sent, but you can always go to Communication > Scheduled Emails to see the list of recipients.