Chapter 5: Emailing From Your Relay Dashboard

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- Manage & Send Emails
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Sending emails from the Relay Dashboard is an easy way to spread the Relay For Life mission to end cancer and secure lifesaving funds.

This section of the online manual will show how easy it is to send email messages and follow up with your friends, family, and colleagues as you generate support for Relay For Life.

Did you know? Relay participants who send emails from the Relay Dashboard raise on average 6 times more than those who do not. Begin your Relay experience by sharing the news through email to your family, friends, and peers.
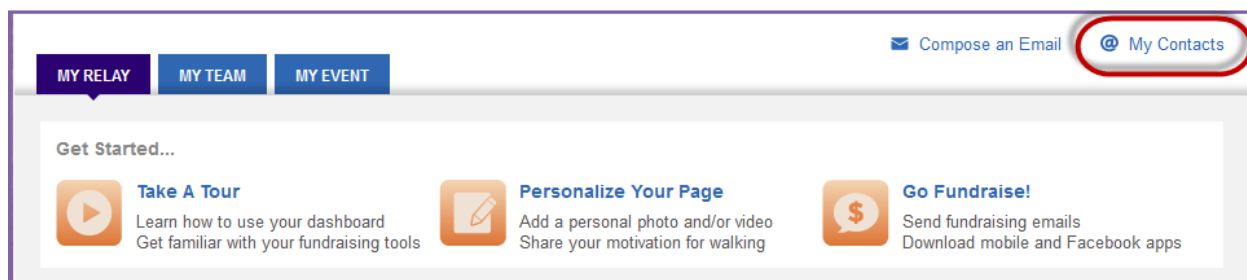

Managing Your Address Book

As an online Relay participant, you can manage an Address Book in the Relay Dashboard, making it easy to send emails to your friends, family, and co-workers asking for their support. After creating and managing your Address Book, with just a few clicks, you can select and send emails to them without typing their email addresses repeatedly.

Note: The contact information in your address book is strictly for your use. Neither the American Cancer Society nor web system will send unsolicited email (spam) to your contacts in your address book, or sell the information to a third party.

Access Your Address Book

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.

3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
   a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Relay Dashboard will automatically be in your current Address Book.
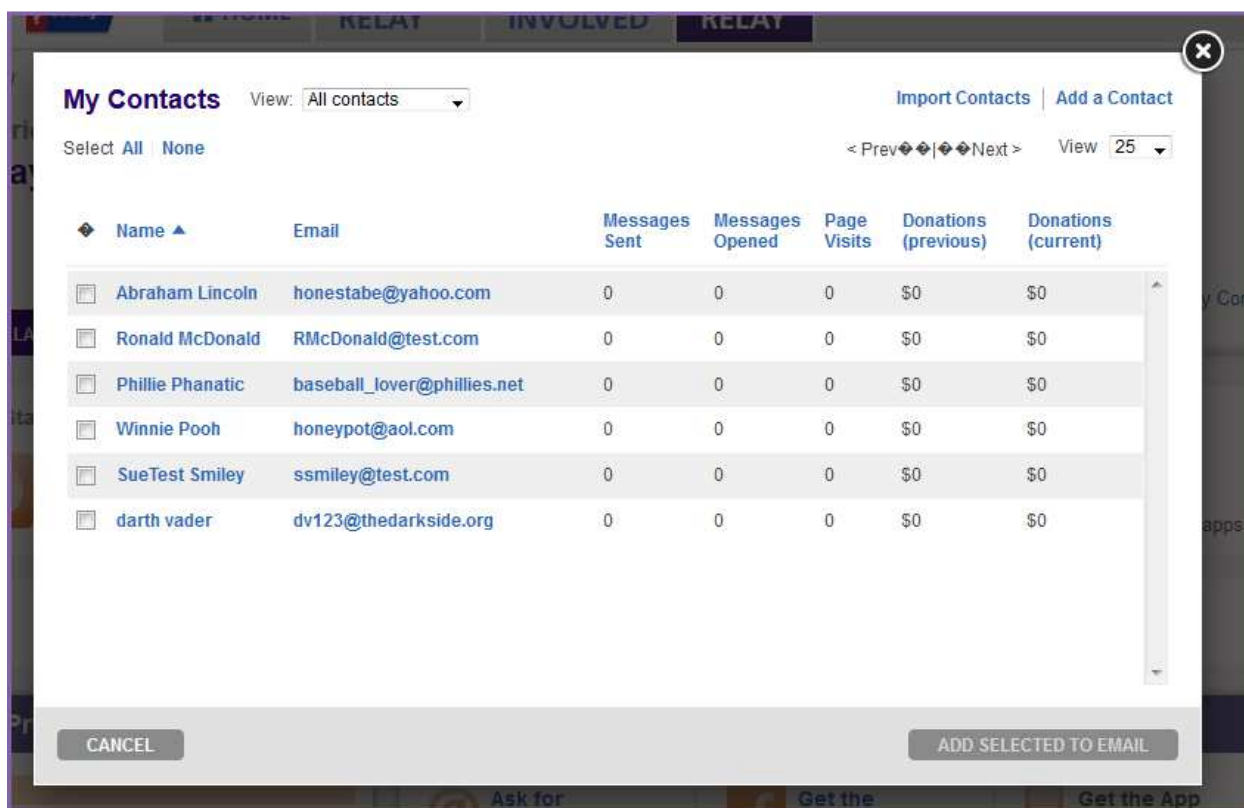

Import Contacts into Your Relay Dashboard Address Book

Before sending an email to your family and friends asking for support, take a moment to upload your contacts into the Relay Dashboard. This will make emailing even easier; with just a few clicks, you can select and send emails to them without typing their email addresses repeatedly.

## *Import Contacts from your Personal Email Provider*

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.
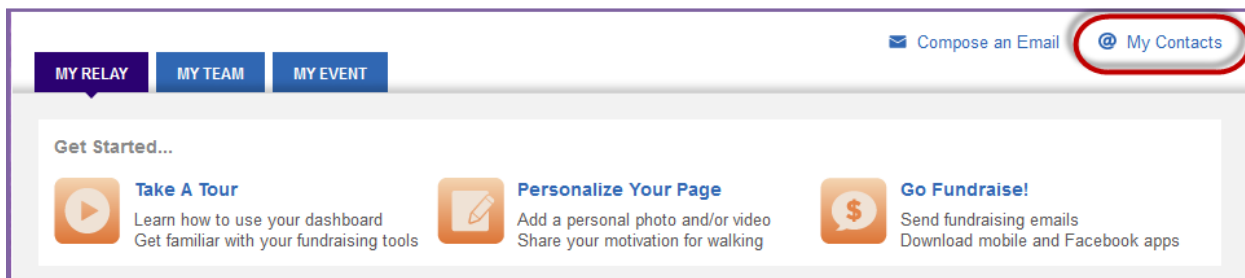
3. At the top of the **Contacts** overlay, click the **Import Contacts** link.


4. Choose the email service provider where your contacts are stored by **clicking the button** beside the source. Choose **Next**.
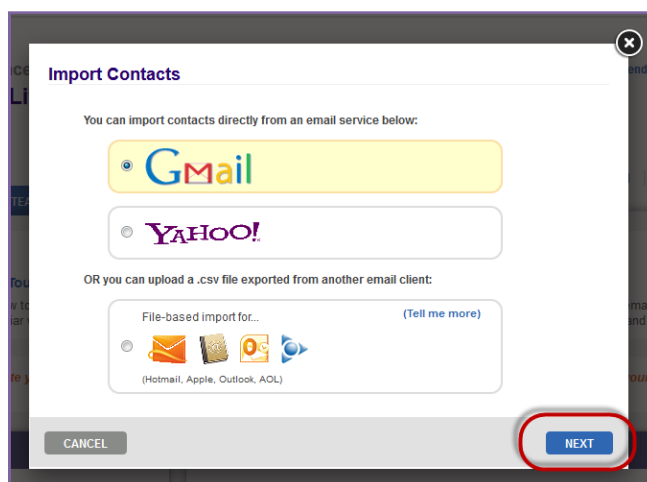

If you use an email service other than Gmail or Yahoo!, please export your current address book as a CSV file. Once the CSV file is created, you may upload them into the Relay Dashboard. More directions about importing a CSV file are available in the following section.

5. Enter the username and password for your email program and click **Sign In**.

6. Allow the Relay For Life website access to your email contacts by clicking **Grant Access**.
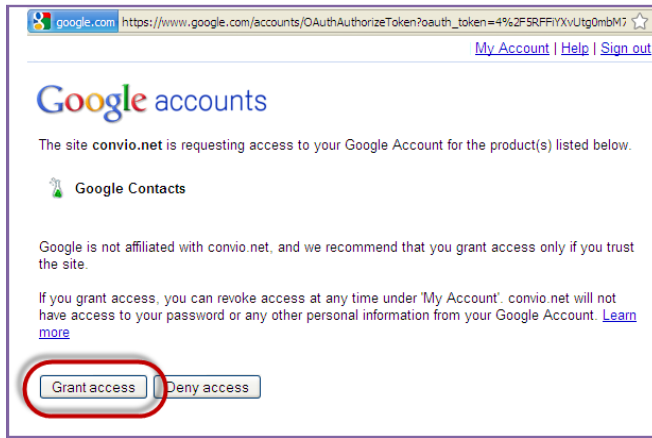
7. **Read** the consent agreement to allow the Relay Dashboard to access your online address book. **Click Next**.
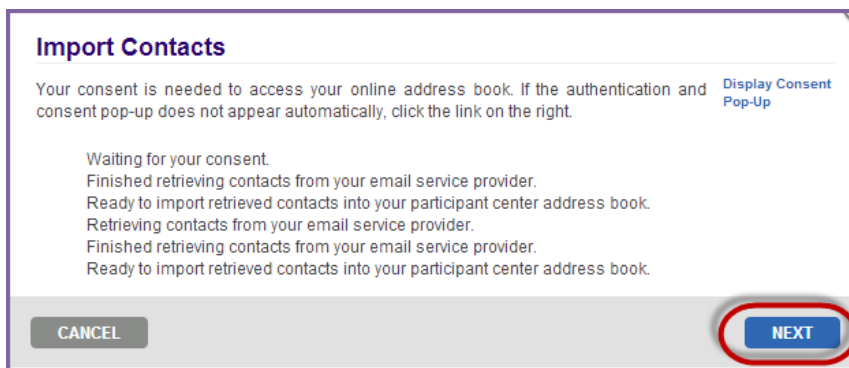

8. Determine if you wish to import all, or only some, of your email addresses into the Relay Dashboard by **checking the appropriate radio button.**
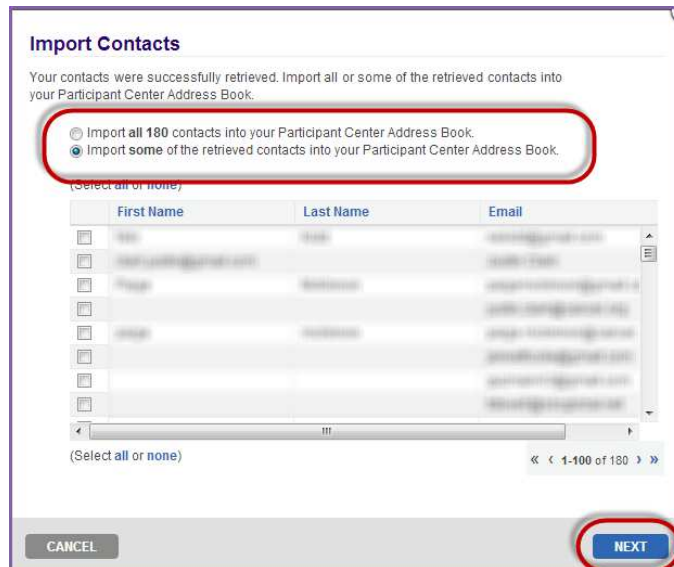
    a. If not all contacts are selected, individually choose which email addresses are to be uploaded by **checking the box** besides each record.

    b. Click **Next**.

9. Review the contacts you have selected to add to the Relay Dashboard Address Book before clicking **Finish**.

*If you have any questions, please open a support ticket at helpme.cancer.org*
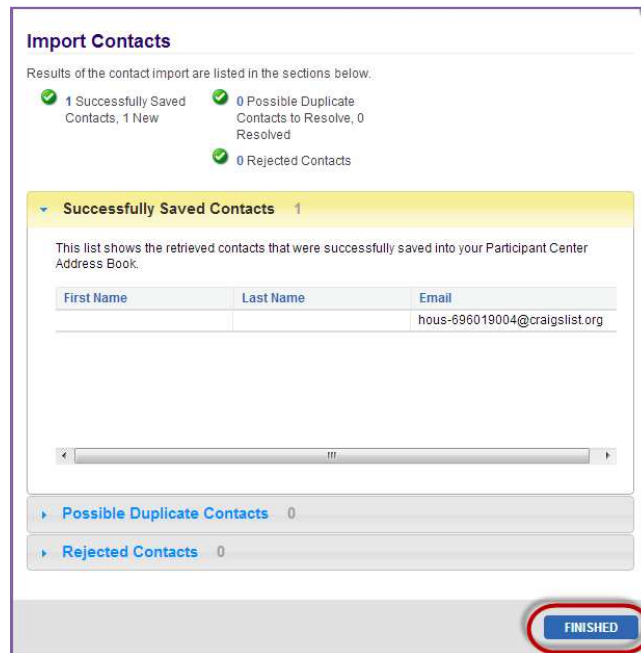
10. Your personal email Address Book has been successfully uploaded into the Relay Dashboard to help you communicate and follow up with your contacts as they support your efforts to fight cancer.

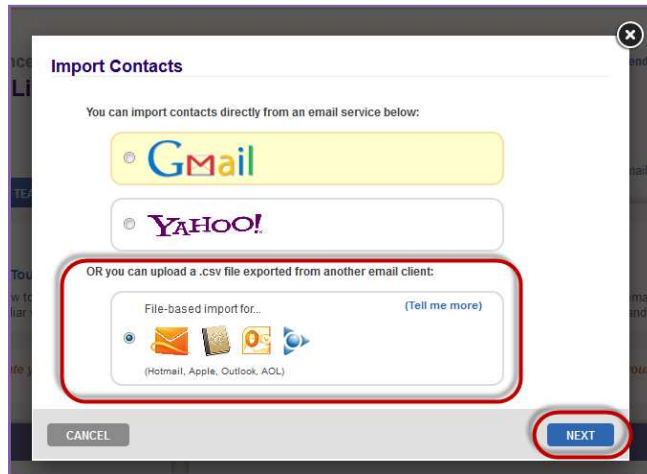## *Import Contacts from a CSV File*

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.
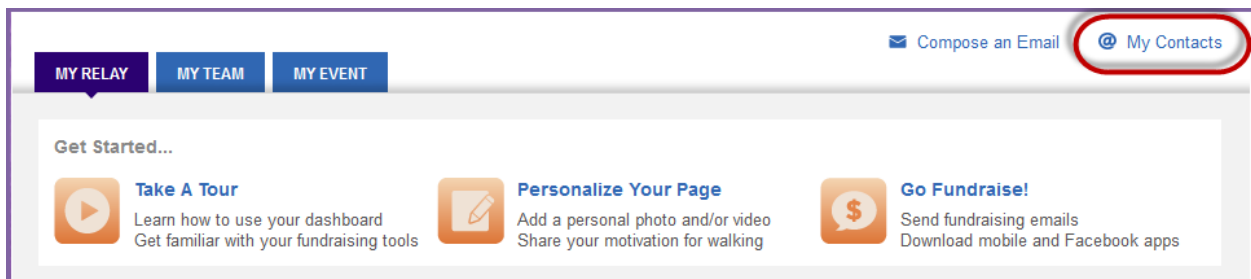
3. At the top of the **Contacts** overlay, click the **Import Contacts** link.
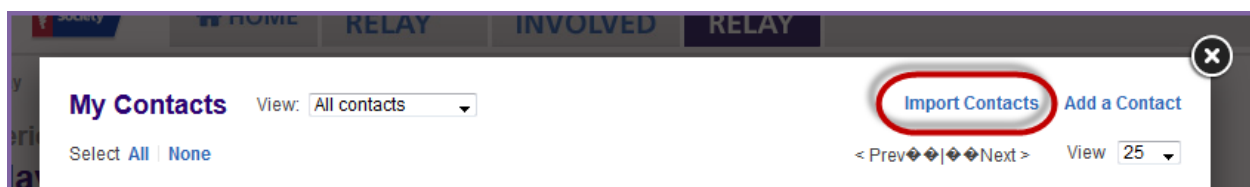
4. Choose to import your email addresses as a CSV file. Choose **Next**.

a. Before uploading your contact file, ensure that the document is in the proper format and saved as a CSV or comma delimited option document as exampled below.
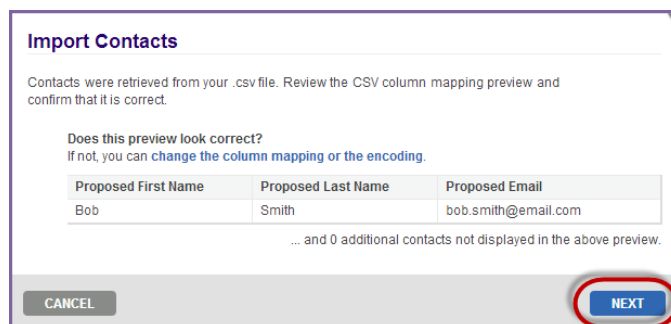
First	Last	Email
Bob	Smith	bob.smith@email.com

b. [More instructions regarding formatting the CSV email address file can be found here](#)

5. Browse for the CSV file on your computer before clicking **Next**.
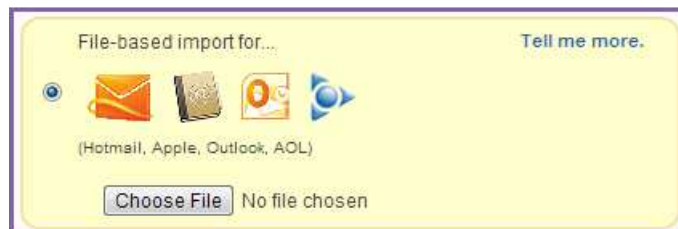
6. Review the preview of the addresses that have been uploaded into the Relay Dashboard. Click **Next**.

7. Determine if you wish to import all, or only some, of your email addresses into the Relay Dashboard by **checking the appropriate radio button.**
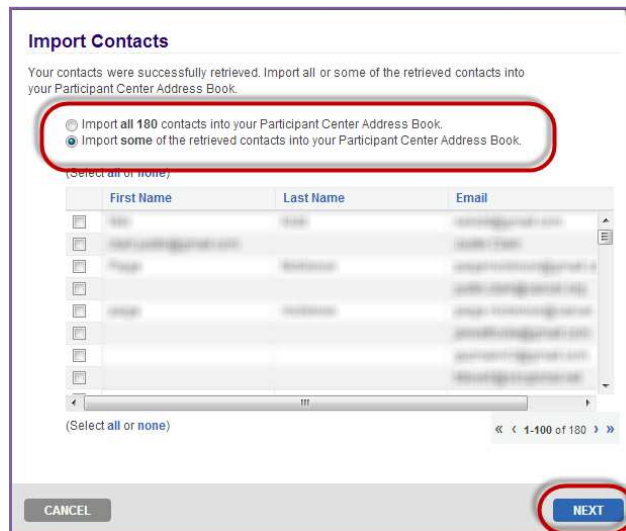
a. If not all contacts are selected, individually choose which email addresses are to be uploaded by **checking the box** besides each record.

b. Click **Next**.

8. Review the contacts you have selected to add to the Relay Dashboard Address Book before clicking **Finish**.
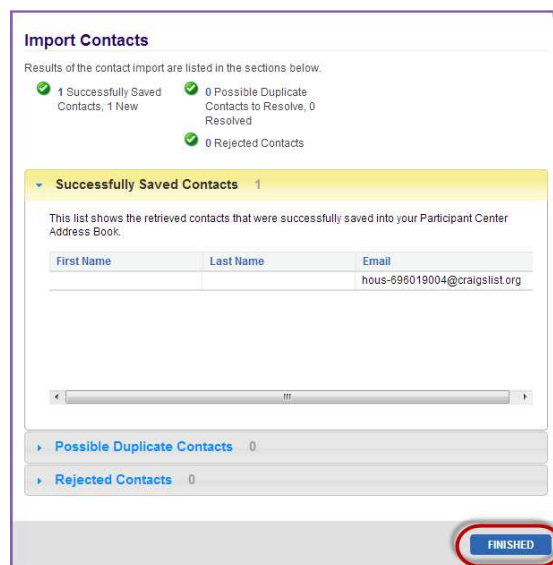

9. Your personal email Address Book has been successfully uploaded into the Relay Dashboard to help you communicate and follow up with your contacts as they support your efforts to fight cancer.
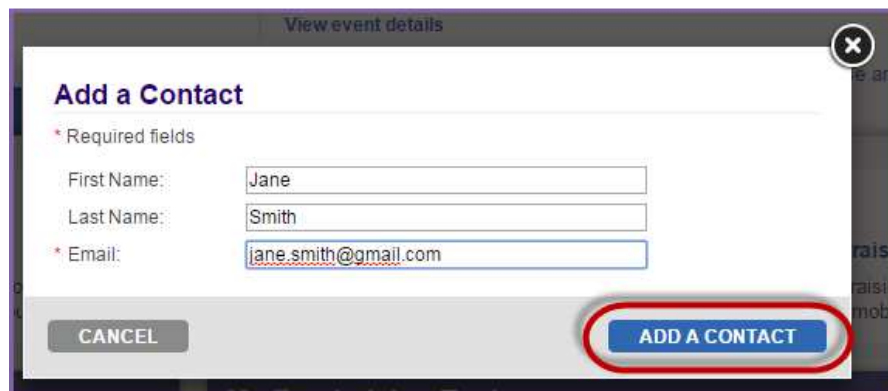
Manually Add Contacts to Your Address Book

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.
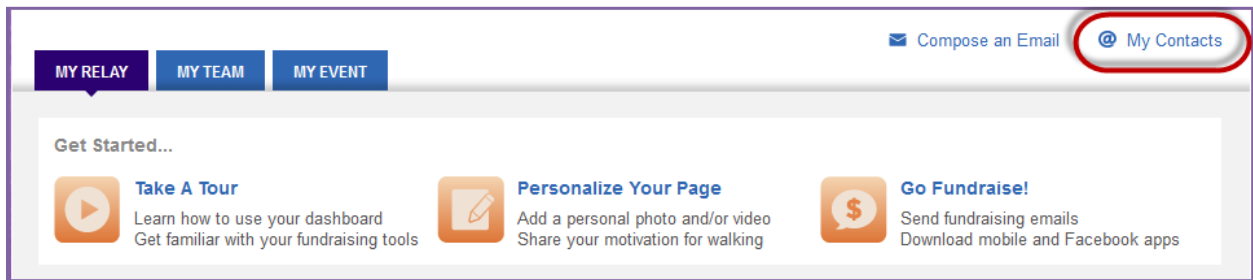
3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
   a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Relay Dashboard will automatically be in your current Address Book.

4. To manually add a new contact, simply click on the **Add a Contact** link in the upper right-hand corner.
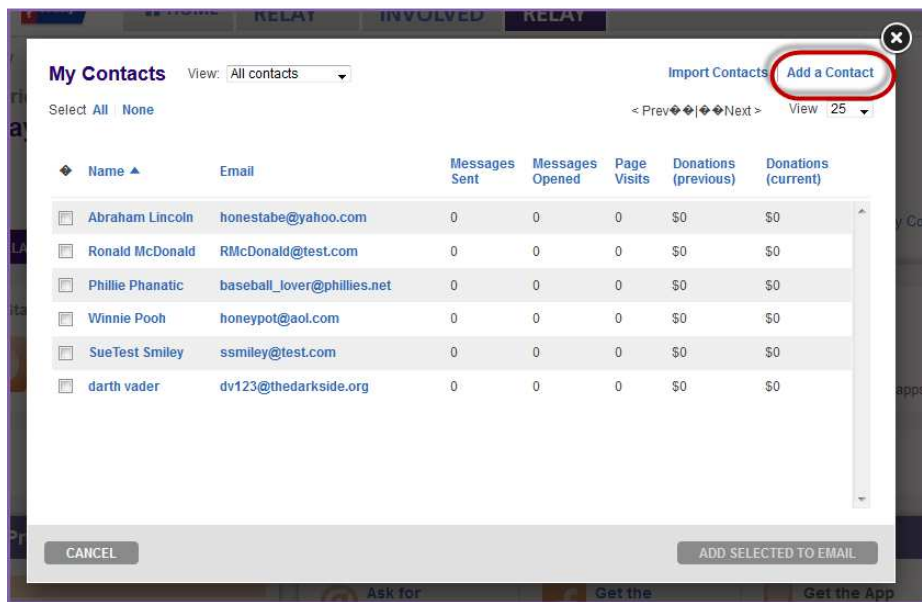
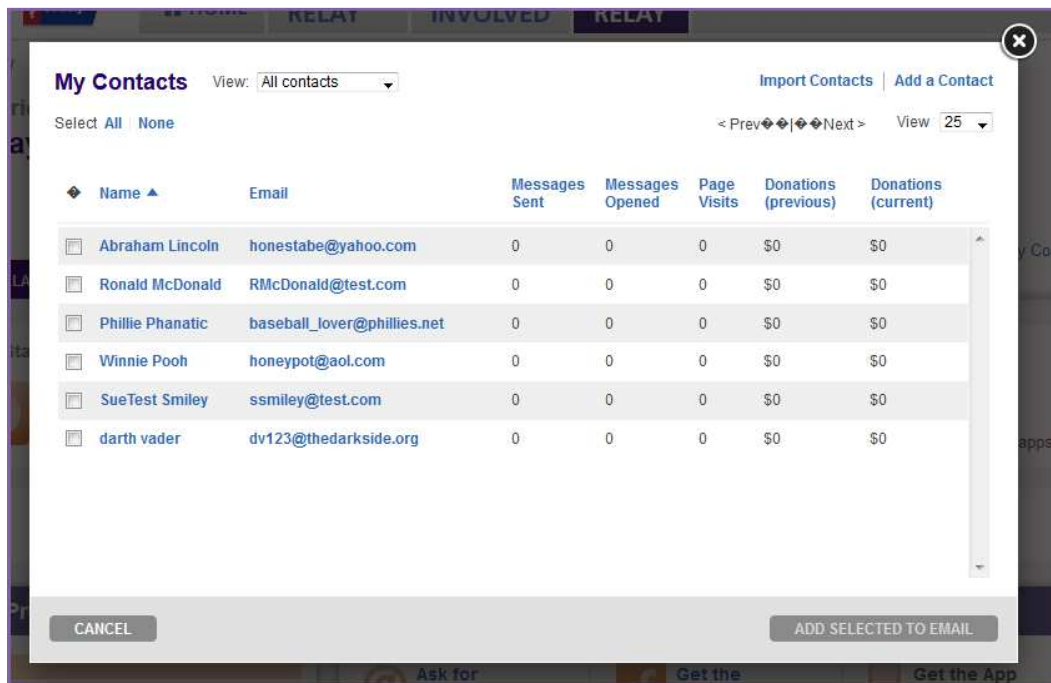5. Add the new contact's First Name, Last Name and Email and click **Add a Contact**.

Edit a Contact in your Address Book

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.
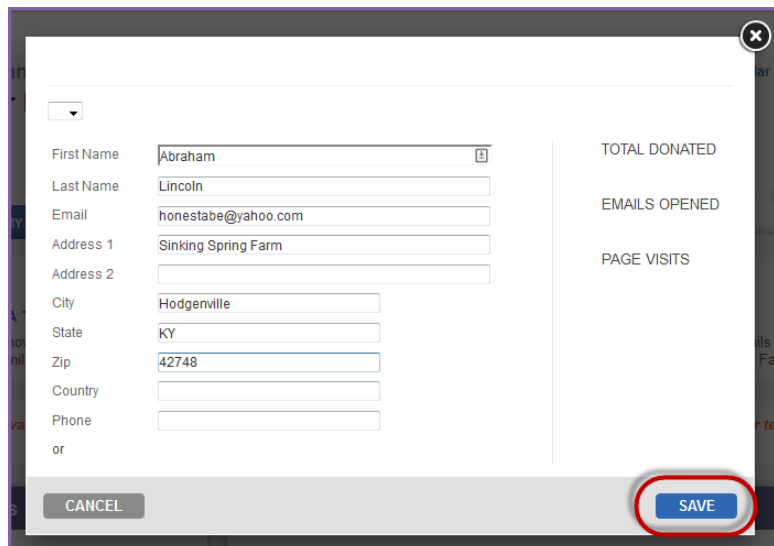
If you have any questions, please open a support ticket at helpme.cancer.org
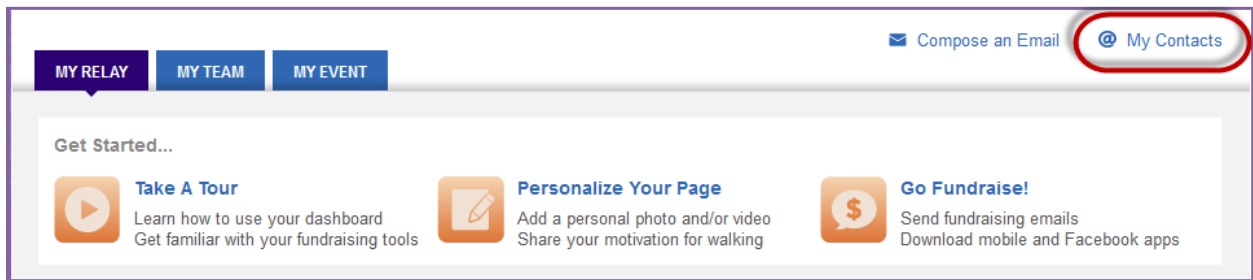
3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.
    a. If you registered as a returning participant, all contacts that you previously uploaded to or emailed from the Relay Dashboard will automatically be in your current Address Book.

4. Simply click on the name of a contact you wish to edit.

5. Update the contact's information and click **Save**.

Delete a Contact in your Address Book

Please note, some contacts in your address book cannot be deleted. Team members and donors cannot be deleted from your address book.
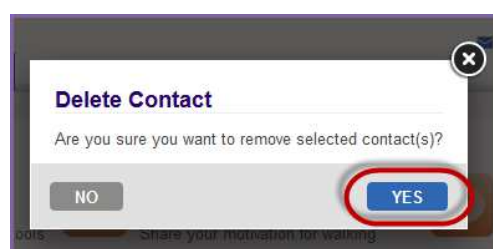
1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.
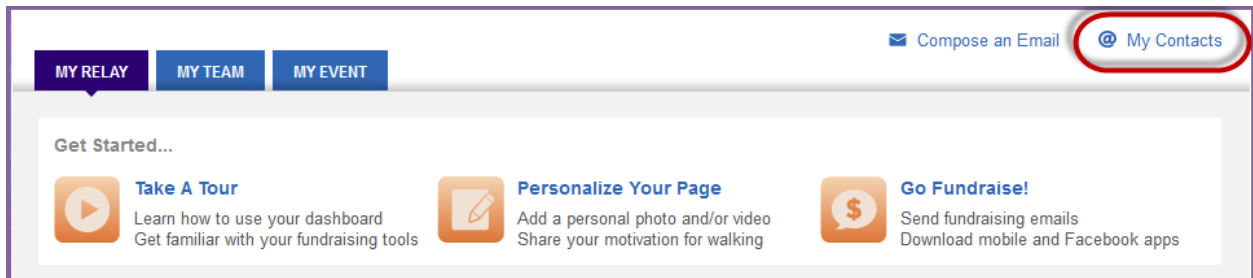
3. The overlay that appears will display email addresses that are currently in your Address Book. **Check the box** beside the contacts' name you wish to delete.

4. From the Select an action drop down menu, click **Delete contact(s)**.
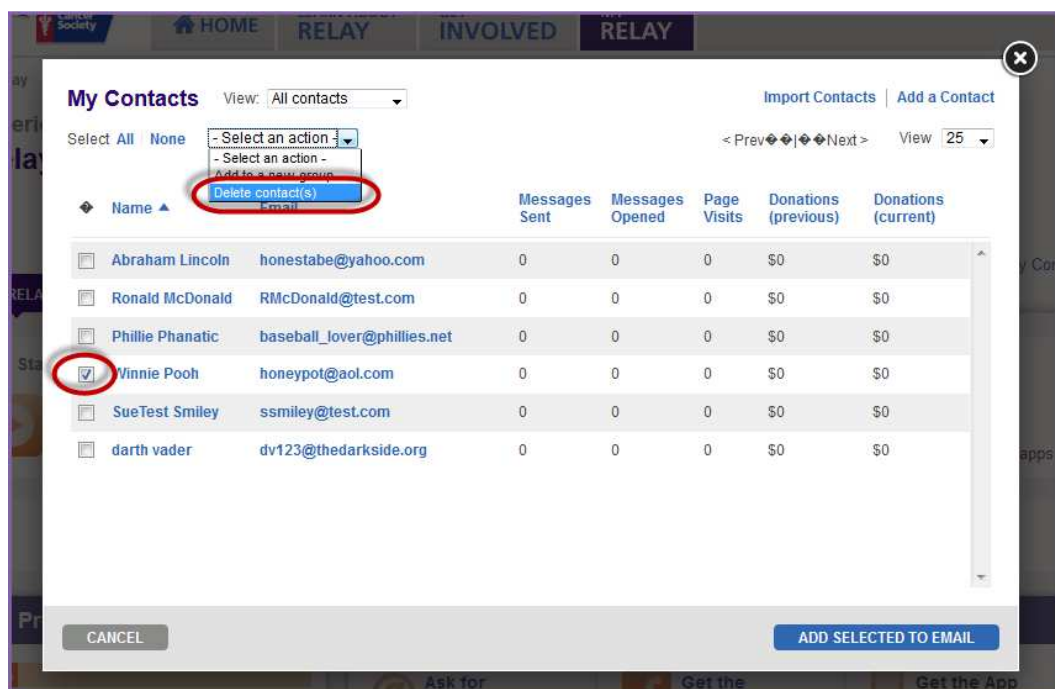
5. **Confirm** to delete the contact from the Relay Dashboard Address Book.

If you have any questions, please open a support ticket at helpme.cancer.org

Create an Email Group

Creating groups for your email contacts is a great way to organize your contacts and communication through the Relay Dashboard.

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.
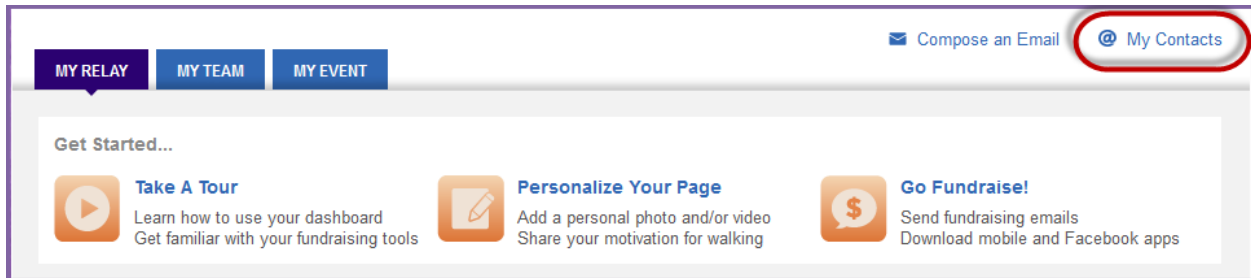
3. The overlay that appears will display email addresses that are currently in your Address Book. **Check the box** beside the contacts' name you wish to add to a new email group.

4. From the Select an action drop down menu, click **Add to a new group**.
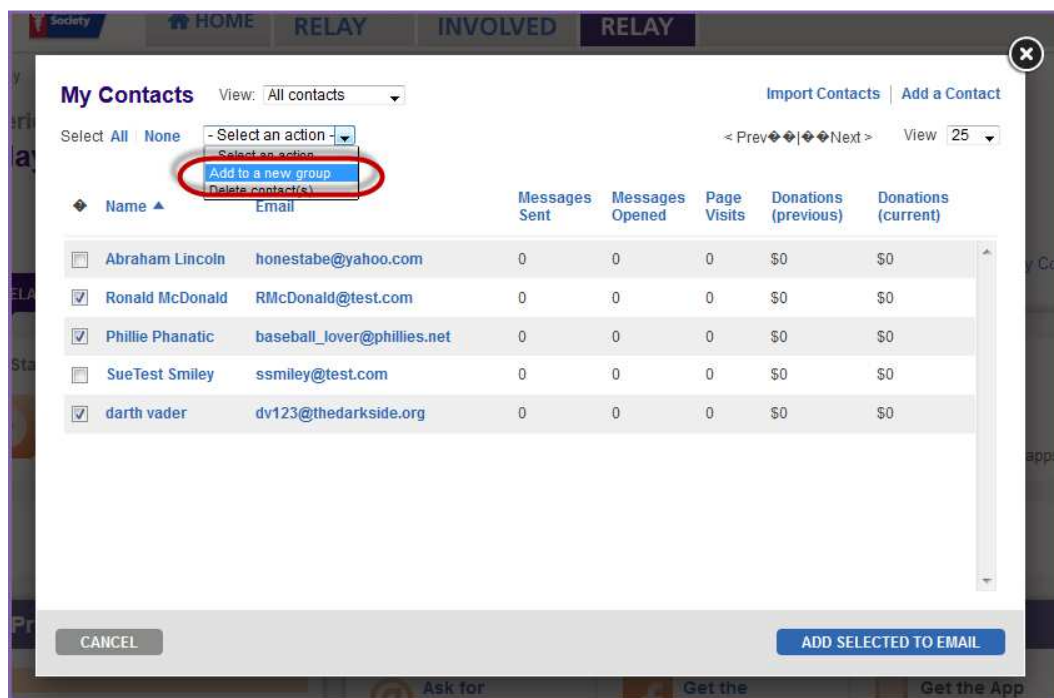
5. Provide the group with a name and click **Create Group**.
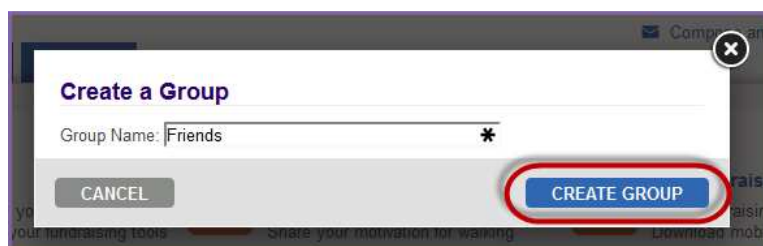
6. Once a group is created and contacts have been tied to the group, you can easily send emails to all group members simply by typing the group name into the email To: field

Manage and Send E-mails

The number one reason why people donate to the American Cancer Society Relay For Life is because someone asked. Take advantage of the tools available in the Relay Dashboard to ask your family, friends, and co-workers for support in the fight against cancer.

Using a well-crafted team building or donation request emails can help direct people to your personal page quickly and encourage support. All emails from the Relay Dashboard will automatically link the recipient back to your personal page and team page.

As you begin sending email messages, note that you can use the template emails available, save your own versions, or create a brand new message that speaks best for you.

Start sending emails today and watch your team and fundraising soar!!
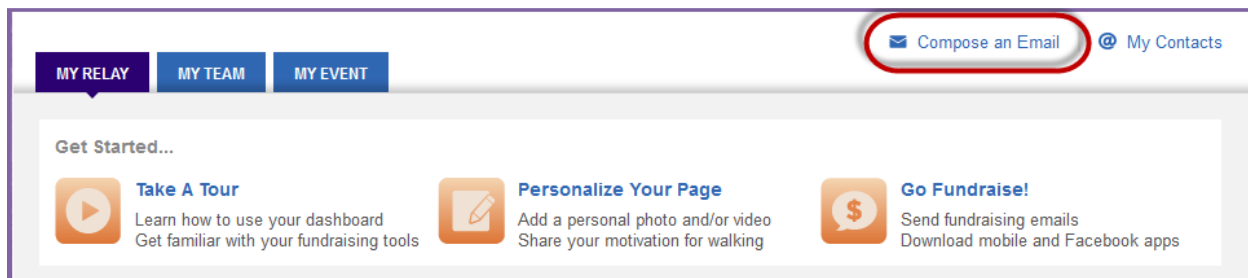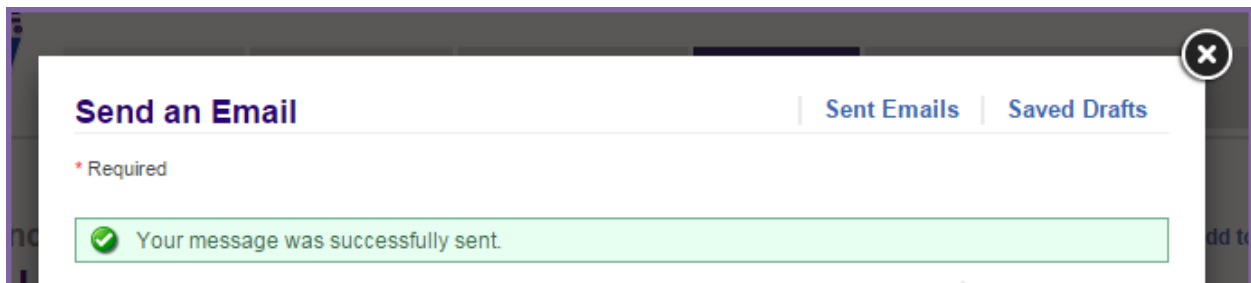
Edit and Send a Message

1. Using your username and password, log into your **Relay Dashboard**.

2. From any section of the Relay Dashboard, click the **Compose an email** link found on the right hand side of the page.

3. The **Send an Email** overlay will appear.
   a. Your name and your email address will automatically populate as the sender's address.
   b. Begin typing the names of those you wish to email into the To: field. If email addresses are already in the Address Book, they will begin to auto-populate.
   c. Click **Select Contact(s)** or **Select Group(s)** if you would like to see more options of individuals you may send the message to.

4. If you need help deciding what to write in your email, choose one of the template messages. Click on the **Select a template** drop down menu to see the suggested messages available (i.e. Thank a Donor) Once you select the template of your choice, the email will appear for you to personalize or send as is
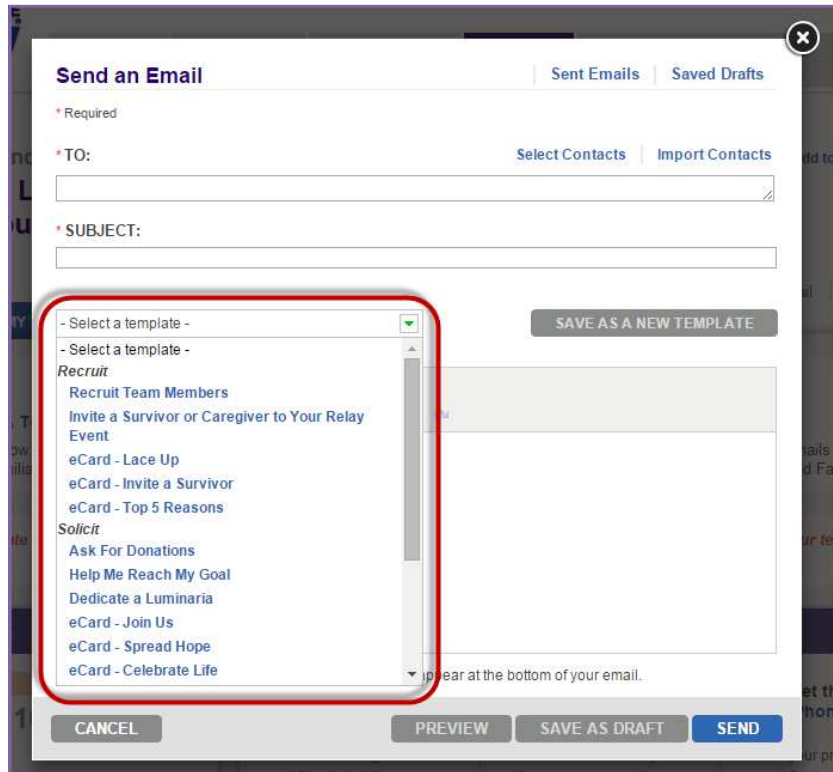
5. Make any changes to the **Subject** and the **Message** text.

6. Click **Preview** to see your email message before you send it.

7. Click **Save as Draft** if you want to save this message for future use.

8. Click **Send** to deliver this message to everyone you have added as a recipient of this email. A confirmation will appear letting you know the message has been sent and giving you an opportunity to continue sending emails.
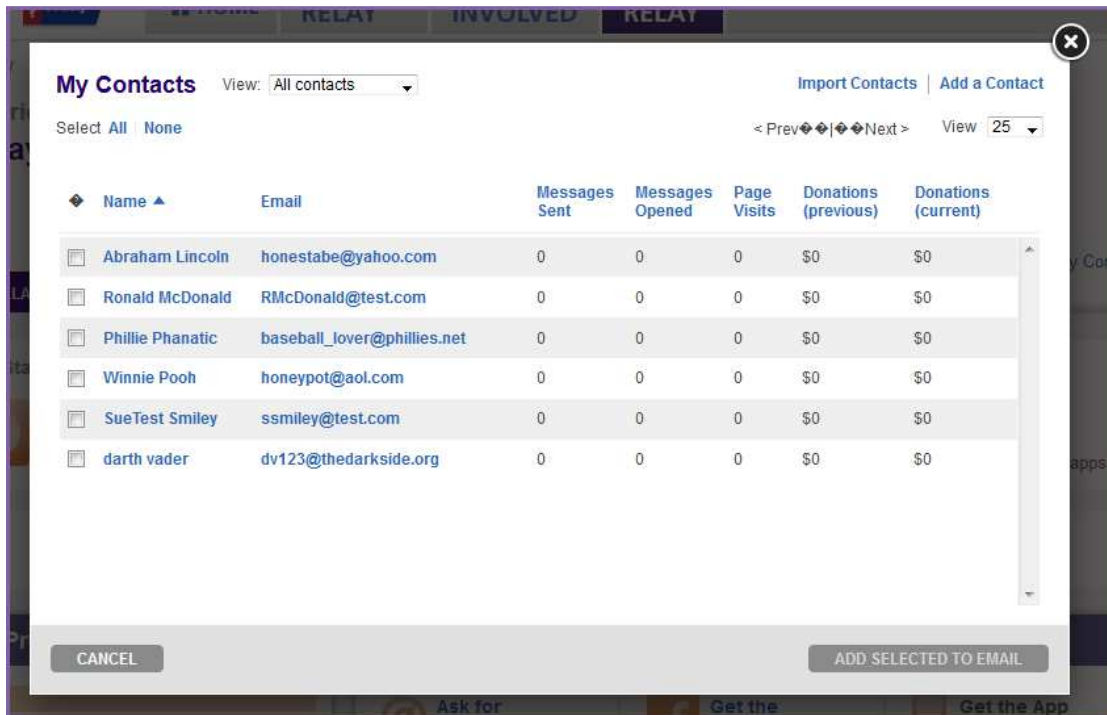

Track Email Contacts

By sorting your Relay Dashboard Address Book, you can easily track people that you've sent messages to, who have joined your team, and who have made donations to you. You can also keep track of those needing follow-up or Thank You emails.

1. Using your username and password, log into your **Relay Dashboard.**

2. From any section of the Relay Dashboard, click the **My Contacts** link found on the right hand side of the page.
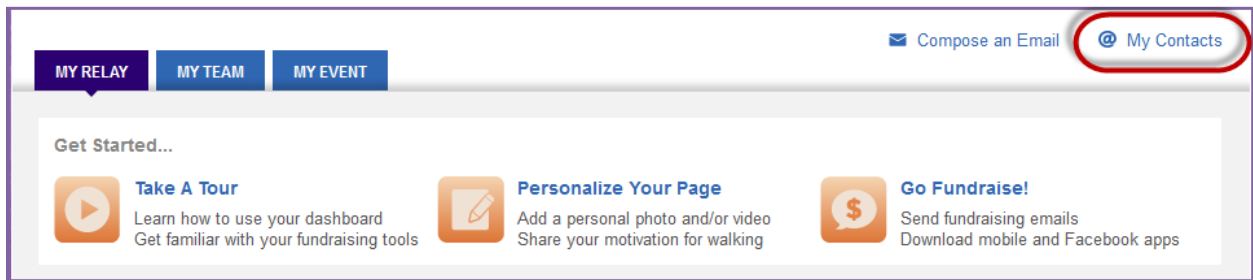
3. Your address book will appear and contain any contacts you uploaded, manually entered, or previously emailed.


4. **Review** the columns beside each email contact to see the number of emails that you have sent to each individual, the number of emails opened, and if the contact has viewed your page or made a donation.
   a. **Check the box** beside any of the contacts that you would like to email based on the information displayed. After selecting the contacts, click **Add Selected to Email**.

5. Use the drop down menu to filter the email contacts by groups.
   a. **Donors:** Sort the list of individuals by those who have made a contribution so that you can be sure to thank them.
   b. **Non-Donors:** Ask for support from those who have not made a gift online.
   c. **Never Emailed:** Be sure to reach out to those who you have not yet emailed.
   d. **Need follow-up:** Send another email to those who need a reminder message
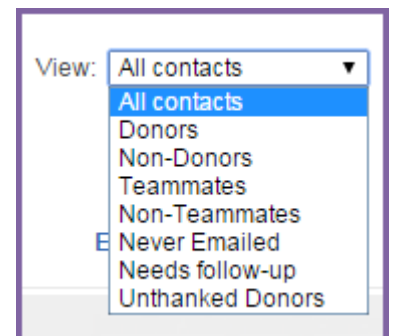
6. You can send emails to the members of a certain group by selecting the individuals within the desired group. Click the box beside the contacts you wish to email and select **Add Selected To Email** to prepare a message, and follow the steps outlined above to compose and send your message.