



Relay Online How To: Email Filtering

You can use [Participant](#) and [Team](#) filters to target your **Engagement** emails to a specific audience of current event participants, based on team captain status, dollars raised or emails sent!

Participant Filters:

As you are working through the delivery setup of your **engagement message**, step 3 gives you the opportunity to select filters based on the participant's registration:

- 1. Previous Event Participation:** Filter the recipients of the email based on whether they participated in the previous event or not.
- 2. Online/Offline Registration:** Filter the recipients of the email based on how they registered – online or offline.
- 3. Date Range:** Filter the recipients of the email based on the date they registered.

1. Select Delivery Type

2. Select Participation Types

3. Select Registration Filters

4. Select Team Filters

5. Review Delivery Details

Related Actions

1. Configure Additional Filters

1. Previous Event Participation Filter:
Select the appropriate option to determine which participants currently registered for this event should be sent this email message.

- All current participants regardless of previous participation
- Current participants who also participated in the previous event
- Current participants who did not participate in the previous event

2. Online/Offline Registration Filter:
Select the appropriate option to determine which participants currently registered for this event should be sent this email message based on how they registered for the event.

- All current participants regardless of their online or offline registration method
- Current participants who registered online
- Current participants who registered offline

3. Date Range:
 Send to current participants registered during the following dates

Start Date: Sep 22 2016

End Date: Sep 22 2016

Next or Cancel

Click **NEXT** to apply your filters.

Looking to further refine your email audience? Click **Configure Additional Filters** under Related Actions.

1. Select Delivery Type

2. Select Participation Types

3. Select Registration Filters

4. Select Team Filters

5. Review Delivery Details

Related Actions

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

- a. **Donations Received:** Filter the recipients based on the number of donations received or the amount the participant has raised as of the email delivery date.
- i. You can also filter on whether a participant has made a self-donation or not (participant must have been logged in at the time of making the self-donation in order for them to filter correctly).

- b. **Participant Emails:** Filter the recipients based on the number of emails they have sent from their dashboard!

- c. **Unconfirmed Gifts:** Filter the recipients based on the number of outstanding unconfirmed gifts that the participant has in their Gift History

Click **FINISH** to apply your participant filters.

Team Filters

As you are working through the delivery setup of your **engagement message**, step 4 gives you the opportunity to select filters based on the recipients' team information:

1. **Team Membership Filter:** Filter the recipients of the email by team captains, team members, or individual walkers.

2. **Company Affiliation Filter:** Filter the email list further by the participants' corporate affiliation.

Click **NEXT** to apply your filters.

The screenshot shows a sidebar on the left with a navigation menu: 1. Select Delivery Type, 2. Select Participation Types, 3. Select Registration Filters, 4. Select Team Filters, 5. Review Delivery Details. Below the menu is a 'Related Actions' section with a link for 'Configure Additional Filters'. The main content area contains two filter sections:

- 1. Team Membership Filter:** Select the groups of people participating on a team that should be sent this email message. (Note: To exclude a group of team participants from this mailing, remove the checkmark from its checkbox.)
 - Individual participants not on a team
 - Team members
 - Team captains
 - Company coordinators of teams
- 2. Company Affiliation Filter:** Select the appropriate option to determine which participants will be sent this email message based on their association with a company.
 - All participants whether company affiliated or not
 - Participants affiliated with any company team
 - Participants affiliated with the following company

Below these filters is a field for 'Name of the Specific Company:' and a 'Next' button.

Looking to further refine your email audience? Click **Configure Additional Filters** under Related Actions.



a. **Donations Received:** Filter the recipients based on the number of donations received or the amount the participant has raised as of the email delivery date.

i. You can also filter on whether a participant has made a self-donation or not (participant must have been logged in at the time of making the self-donation in order for them to filter correctly).

The screenshot shows the 'Configure Additional Filters' page with 'a. Donations Received' selected in the sidebar. The main content area contains four filter sections:

- 1. Minimum Number of Donations:** Enter the number of donations that a participant must have received in order to be sent this email message. [Input field]
- 2. Maximum Number of Donations:** Enter the number of donations that a participant must have received in order to be excluded from this mailing. [Input field]
- 3. Minimum Donation Amount:** Enter the monetary amount that a participant must have raised in order to be sent this email message. [Input field]
- 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.) [Input field]
- 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

At the bottom, there is a 'Next' button.

b. **Participant Emails:** Filter the recipients based on the number of emails they have sent from their dashboard!

The screenshot shows the 'Configure Additional Filters' page with 'b. Participant Emails' selected in the sidebar. The main content area contains two filter sections:

- 1. Minimum Number of Emails Sent by Participant:** Enter the number of emails that a participant must have sent from their Participant Center in order to be sent this email message. [Input field]
- 2. Maximum Number of Emails Sent by Participant:** Enter the number of emails that a participant must have sent from their Participant Center in order to be excluded from this mailing. [Input field]

At the bottom, there is a 'Next' button.

c. **Unconfirmed Gifts:** Filter the recipients based on the number of outstanding unconfirmed gifts that the participant has in their Gift History

1. Select Delivery Type	1. Minimum Number of Unconfirmed Gifts: Enter the number of outstanding unconfirmed gifts that a participant must have in their Gift History in order to be sent this email message. (Participants who have less than this number will not be sent this email.) <input type="text"/> <input type="button" value="Finish"/> or <input type="button" value="Cancel"/>
2. Select Participation Types	
3. Select Registration Filters	
4. Select Team Filters a. Donations Received b. Participant Emails	
5. Review Delivery Details	

Click FINISH to apply your filters.