How to Use Autoresponders

This document describes the use of "Autoresponder" mailings in YourVirtuoso. Autoresponders are different from regular mailings, because they are processed every day at the time you specify. They use special selectors that are time based, so that you can schedule a certain email to go to, for example, every family who contacted you 1 week ago. The autoresponder will run every day looking families that now meet that criterion and send the specified email to them.

Creating an Autoresponder

1. Access the Mailing screen using the **Marketing** menu
2. Click **Add a Mailing** to get started

Setting the basics

Set Mailing Recipients & Details

Please use the Select buttons to the lower right to build a query for retrieving customers you w
others. As you are building your query it will be displayed on the left and the total recipients nu
click the *X* button next to it. Click the *view list of recipients* link to see emails that will receive y
query.

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*Type [Email]

*Name of Mailing [Preview Follow Up 1] (2)

*Subject [Thanks For Previewing] (3)

*Send Date [5/14/20] [5:58 PM] (4)

*Frequency ◯ one-time ⦿ auto-responder
(1)

Email address & name mailing is from

*Address [Support@simplysignup.com]

*Name [support testing]

Email Recipients 0

Query for Ch

*Currently you have n
so you are emailing ⋮*

Select families using student information
Select families by enrollment
Select families using contact information
Select families using account balance information
Email everyone
Select from prospects that contacted you
Select families and prospects based on timing
(5)

1. Select the **autoresponder** option, so it will be processed every day. The selectors (5) will change to those suitable for repeating mailings.
2. Autoresponders often come in groups. Perhaps you want to nurture a contact by sending them a series of emails the day after, week after and 2 weeks after they contact you. Name this email so you can easily see which sequence it belongs to and when it is sent in the sequence if appropriate.
3. Give it a subject that encourages the customer to open it
4. Pick a date for the FIRST time you want this to be sent and a time of day. The autoresponder will run every day at this time starting on that date. Consider the type of email and when it makes sense to have it processed. For example, if you schedule a "Thanks for previewing" email the day of the preview, you probably want it sent late in the day after the previews have all happened.

5. Now click the special autoresponder selector to select which families receive this email

Select Who receives this email and When

1. There are 4 trigger events for autoresponders. Enrollments, Previews, Initial Contact Us submissions, and student birthdays. Select the radio button for the type you are creating.
2. Use the drop-down selectors to narrow down when you want this specific email to be sent. You will often create several similar emails (using the clone feature) to send a slightly different email immediately after an event, a few days after etc.
3. Double check the criteria look good and click **OK,** and on the add mailing page click **Next >**

Add or Edit the body of your email

Set Mailing Content

Below are 3 methods for building the content of the email you wish to send the user's you've chosen. You can build a custo... saved, or you can choose from a template you have built before now. Whatever you decide to use will be previewed in the f...

Preview

Currently no content has been set.

Choose a method below for constructing the HTML content of your email.

- Create Mailing Content ...
- Upload a file to send   [Choose File] no file selected
- Use a template to send   [Choose ◆]
- Search template library

There are 4 ways to add content, exactly as for regular mailings:

- **Create Mailing Content** takes you to the editor with a blank page to start on. (Note that if you have cloned a mailing, you start with the previous content, and this button will say **Edit Mailing Content**
- **Upload a File** lets you import a text or html file that you have created outside YourVirtuoso. Note that MS Word documents, PDF's etc. are not compatible with this upload feature, but you may be able to save them as text and import them. It is not recommended to export MS Word as html for this purpose, as this creates a very complex html file using MS proprietary style commands that often conflict with YourVirtuoso html styling.
- **Use a Template to send** lets you select a template that you may have saved using the **Marketing/Templates** feature
- **Search template library** accesses a library of predefined emails that depend on the **affiliation**(s) you have selected under **MyInfo/Main**

After creating and formatting your email, click OK to get back to this page, and click **Next >**

Confirm all is good

Confirm Mailing Information

Review the information gathered below & confirm its accuracy before saving. Click the *Back* button to return to previous screen's & update any information entered incorrectly. If everything is valid the click the *Save* button to schedule this mailing. Once a mailing is scheduled in the system it can later be edited & have any information modified.

Preview Follow Up 1 Email Mailing for 0 recipients

Email Mailing Details

Name	Preview Follow Up 1	**Recipient Count**	0
Send Date & Time	5/13/20 5:58 PM	**Frequency**	auto-responder
Subject	Thanks For Previewing		
From	support testing (Support@simplysignup.com)		
Query	Day of Attended Preview in anything, unit of any kind, taught by anyone at any location on any day at any time		

Mailing Content

Test

Help   < Back   Save   Cancel

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1. Check that the parameters and content are good and click **Save** and **Back to Main** to see your list of mailings & autoresponders

Managing Your Autoresponders and Mailings

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home · messaging · support · help · change password ·

Content | Classes | Families | Marketing | Reporting | Setup | My In

Calendar · **Mailings** · Templates · Referral Sources · Prospective Cust

Add a Mailing

Scheduled ✓ in Last 3 Months   Name   go   advance
in Last 6 Months
in Last Year
at Any Time
Future Auto-Responders
Completed Auto-Responders

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z 0 1 2 3 4 5 6 7 8 9

Name	Mailing Date & Time	Re...	...ncy	Status	
Preview Follow Up 1	5/13/20 5:58 PM		...onder	Scheduled	clone
week after enroll	5/15/19 3:00 PM		...onder	Scheduled	clone
3week after enroll	5/15/19 3:00 PM	3	auto-responder	Scheduled	clone
3 Days after enroll	5/15/19 3:00 PM	0	auto-responder	Scheduled	clone
2 Days after enroll	5/15/19 3:00 PM	0	auto-responder	Scheduled	clone
1 Day after enroll	5/15/19 3:00 PM	0	auto-responder	Scheduled	clone
Week after contact	5/15/19 1:30 PM	0	auto-responder	Scheduled	clone
Day of contact	5/15/19 1:30 PM	0	auto-responder	Scheduled	clone
Day after contact	5/15/19 1:30 PM	0	auto-responder	Scheduled	clone
2 Day after contact	5/15/19 1:30 PM	0	auto-responder	Scheduled	clone
P Sched now	5/15/19 1:00 PM	0	auto-responder	Scheduled	clone
P Sched 3 Day	5/15/19 1:00 PM	0	auto-responder	Scheduled	clone
P Sched 1 Day B4	5/15/19 1:00 PM	0	auto-responder	Scheduled	clone
P Sched 1 Day	5/15/19 1:00 PM	3	auto-responder	Scheduled	clone
P Att 1 Day after	5/15/19 1:00 PM	1	auto-responder	Scheduled	clone
P Absent	5/15/19 1:00 PM	0	auto-responder	Scheduled	clone
Test Day of Birthday	5/15/19 10:30 AM	0	auto-responder	Scheduled	clone
Test Birthday 2 days	5/14/19 9:50 PM	0	auto-responder	Scheduled	clone
Test Birthday	5/14/19 9:50 PM	0	auto-responder	Scheduled	clone
should not repeat	4/23/19 3:05 PM	2	one-time	Completed	clone
Day after enrolling	4/19/19 5:00 PM	0	auto-responder	In Progress	clone

With multiple autoresponder running every day, you will probably be sending many more mailings than you have to date. To keep your list of mailing manageable, the default view will show recent, normal

mailings and the next scheduled processing day/time for each of your autoresponders.
To modify or stop an autoresponder, click it and edit or delete it.

1. You can see which are regular (one time) mailings and which are autoresponders in this column.
2. The Status column continues to show mailings that are scheduled (future) In Progress (now) and Completed (past). Note that only Completed regular mailings show here.
3. To see when autoresponders were sent, and who they were sent to, select **Completed Auto-Responders** from the **Scheduled** drop down