

Understanding Email Events & Reminders

Cybergrants Webinar

Meet Your Trainer

Megan Dodds

Sr. Training Specialist

clienttrainingrequests@bonterratech.com



Learning Objective

To share how you can leverage the power of email events and reminders to enhance your outreach, increase your engagement and ultimately drive results for your program.

Agenda

Overview of Email Events & Reminders

Default vs. Program Level

Email Digest

Test Email Formatting

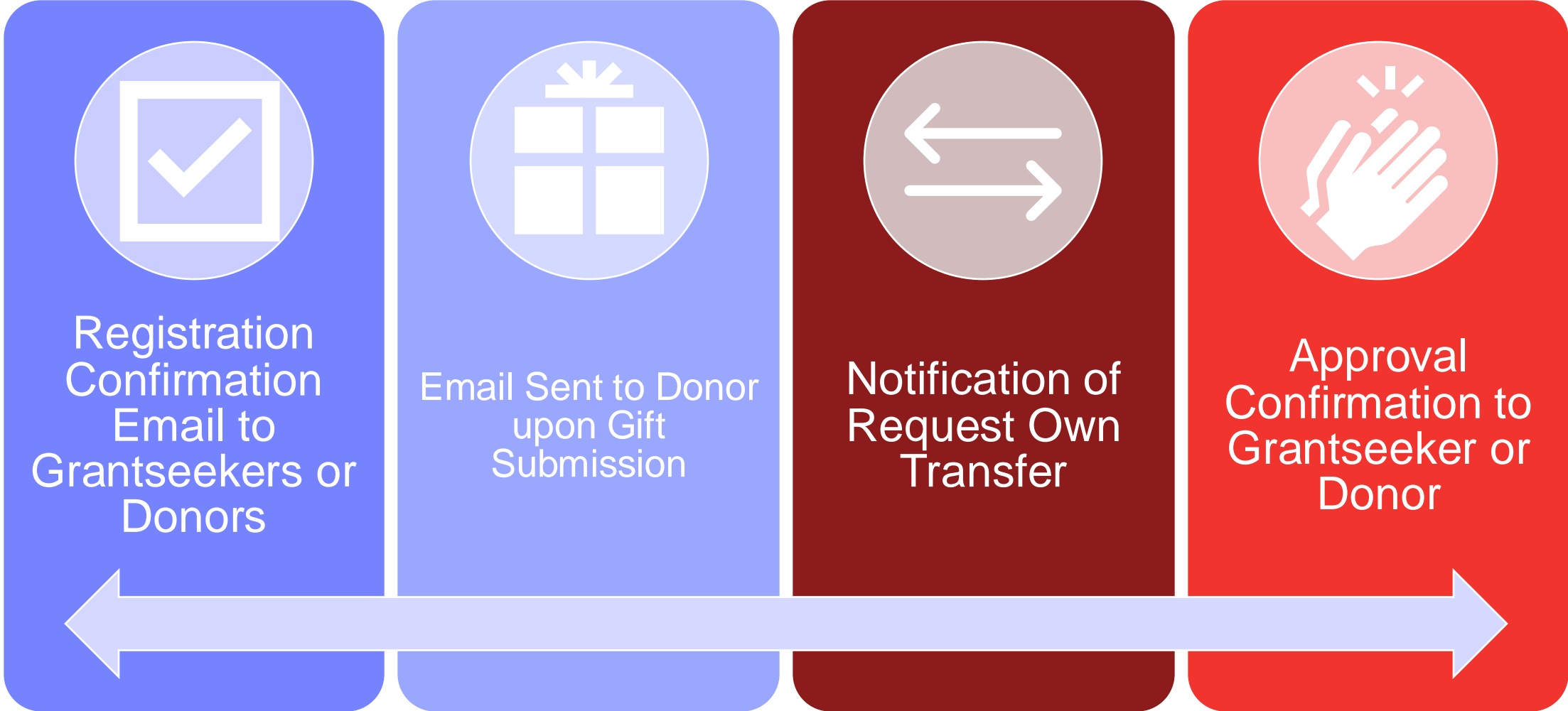
Managing CyberGrants Communications

Overview of Email Events & Reminders

Email Events allow you to automate your programs workflows and processes by automatically sending program related communications based off of set criteria.

With 178 different emails to various audiences, you can leverage the power of CyberGrants to enhance your communication and drive responses!

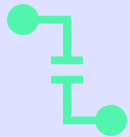
Email Events



Email Reminders



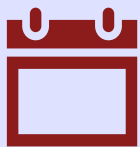
Inform a request owner or grantseeker of an overdue impact report.



Remind a request approver of a step that remains incomplete.



Let an employee know their request has been approved or paid.



Send reminders to event editors and employees that have signed up to participate in an upcoming event.

Default vs. Program Level

Default vs. Program Level Email Events

Default

One email event applies to all proposal types

No custom language in the email apart from merge fields

Program Level

A unique email event for each proposal type

Allows for custom language in the email

Default Event Emails

- Merge fields wrapped in curly brackets allow for personalization to each recipient
- Request support if you need to create your own merge fields

Merge Fields:

E-mail Subject:

Gift ID {EG Request ID} is still pending approval

Merge Fields:

Body:

(29681 character(s) remaining)

Please be advised that Gift # {EG Request ID} is still pending approval. Please have the approver review this gift as soon as possible.

Click the link below to access this gift:

{BEGIN GMSLINK}ega_main.req_access?eg_type_id={EG Proposal Type ID}&org_id={Organization ID}&x_req_id={EG Request ID}{END GMSLINK}

Send reminder e-mail when the number of days taken to complete an approval step reaches:

Apply current e-mail reminder settings:

(Default)

CCDS Matching Grant CCF

Program Level Event Emails

- Different Languages
- Differentiate between proposal types
 - *(Event sign up versus matching gifts)*
- Hard coded signature line language that is specific to a program

E-mail Subject:
(Default: Grant Application Revision Requested)

Grant Application Revision Requested

Merge Fields:

Body:
(29828 character(s) remaining)

(Default: Your application is being return for revision with the following comments
Wei Liu)

Your application for the Education Assistance Program Grant is being return for revision with the following comments:

{Request Review Comments}

Thanks,
Wei-Wei Liu

Apply current e-mail event settings:

Capehart E-Signature test
Capehart test
Chelsea's Sample
Chelsea's Sample
Corey Test
Educational Assistance Program

Save Restore Default Translate Done

Email Digest

Email Digest

- Provides a concise daily summary of all requests pending approval
- Configured by the admin to only send when a new request is added, ensuring timely updates without unnecessary notifications
- The email digest:
 - Utilizes an HTML design
 - Supports single sign-on (SSO)
 - Offers linking capabilities for seamless integration with program processes



How To Set Up

You are in the Sandbox Environment

1 Admin Employee Giving Volunteer Events

Pages

appearance and layout of internal and external portal pages. Utilize a variety of tools to stay informed.

- Internal Portal Pages
- External Portal Pages
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- External Portal Pages

E-Mail Configuration

Set up automated emails triggered by internal and external system events. Remind key actions that require their attention.

- Standard Events**
 - Request
 - Impact Report
 - Survey
 - Donor
 - Employee Giving
 - Employee Giving Payments
 - Event/Opportunity
 - Payroll
 - Nomination
 - Nominator
- Reminders**
 - Request
 - Impact Report
 - Employee Giving
 - Event/Opportunity
 - Nomination
- 2 Digests**
- E-mail Screens**
 - Configure Donor E-mail Screens
 - Test Email Formatting

Edit E-mail Event

To edit the text of an event-based e-mail template, use the Merge Fields to easily incorporate organization data.

Active?

Event Name:
Pending Approval Email

Reply-to:

Sender E-mail:
Displays if a custom e-mail address is configured. Configure here.

E-mail Events

Automate your organization's workflow process by setting up e-mail events.

Info: Please note any changes made in this section will apply to all proposal types.

Available E-mail Events

Active?	Name / Description
<input checked="" type="checkbox"/>	Pending Approval Email (ID#50000) Email containing all requests pending the approval.

Save

Example

- Aggregates list of requests that are pending review
- Allows direct access to each request by clicking on the Request ID
- Can use “Review in Bulk” to act on all Requests without having to search for each request

Dear Jennifer Rivera:
The following request(s) is/are pending your approval. Please review these requests in CyberGrants as soon as possible.

[Review in Bulk](#)

Organization Name: Another Mitchell Test Org
Request ID: [8301114](#)
Project Title: 456
Amount Requested: 50,000 EUR
Request Owner: zzzMonica zzzZucker
Request Date: 03/29/2018

Organization Name: Education Rocks
Request ID: [13487655](#)
Project Title: elderly education
Amount Requested: 5,000 GBP
Request Owner: Jennifer Rivera
Request Date: 03/04/2014

Organization Name: HAILEYS HOPE FOUNDATION
Request ID: [8057342](#)
Project Title: TEST 02.03.2017
Amount Requested: 1,000 USD
Request Owner: xAnthony xShimek
Request Date: 02/03/2017

Organization Name: JP MORGAN BANK FEES
Request ID: [54918473](#)
Project Title: 2019 Bank Fees June - settlement charge

Test Email Formatting

Test Email Formatting


- 
- Test all emails before sending to confirm recipient experience

- 
- Troubleshoot previous emails

- 
- QA merge field functionality & HTML formatting

- 
- Test email events, reminders, custom emails & mail templates

How To Test

 **E-Mail Configuration**

Set up automated emails triggered by important internal and external system events. Remind users of key actions that require their attention.

- Standard Events
 - Request
 - Impact Report
 - Survey
 - Donor
 - Employee Giving
 - Employee Giving Payments
 - Event/Opportunity
 - Payroll
 - Nomination
 - Nominator
- Reminders
 - Request
 - Impact Report
 - Employee Giving
 - Event/Opportunity
 - Nomination
- Digests
- E-mail Screens
 - Configure Donor E-mail Screens
 - Test Email Formatting**

Test Email Formatting

Use this table to review content and formatting of system generated emails from the Sandbox Environment. Select an already created email to view details.

This page only shows the most recent 500 emails created in record > Mail > View Existing Mail. Make sure you've completed the configuration of the email system.

	Subject	Date Created
Test	Publication Successful	9/11/2024
Test	Prod Sandbox Financial Transactions Missing Billable PT has Completed Successfully	9/11/2024
Test	sandbox.cybergrants.com: CyberGrants User ID Password Change Required	9/11/2024
Test	sandbox.cybergrants.com: CyberGrants User ID Password Change Required	9/11/2024
Test	sandbox.cybergrants.com: CyberGrants User ID Password Change Required	9/11/2024

ated emails from the Sandbox Environment. Select an already created email to view details.

Send Test Email

Send a test email to:

Comma separate emails to send to multiple accounts

megan.dodds@bonterratech.com

Send **Close**

24	cgadmin@cybergrants.com	c-angelle.bacolod@bonterratech.com
24	cgadmin@cybergrants.com	ashley.desrameaux@bonterratech.com

Managing CyberGrants Communications

Opting out of CyberGrants Email Notifications

Users can update communication preferences by navigating to their User Profile in the top right-hand corner of CyberGrants and scrolling to the bottom to find these two settings:

Receive Communication from CyberGrants?

Select "Yes" to allow this user to receive notifications such as system maintenance notifications and release information.

Receive Email Events?

Select "No" to opt-out all system e-mail events.

Options to Send & Receive Emails from CyberGrants

We recommend that you:

- ✓ Configure email events to send from a Bonterra email address
 - Our support team can help you get this properly set up!
 - Common defaults: cgadmin@bonterratech.com or do-not-reply@bonterratech.com
- ✓ Configure a “Reply to” email directly into each email event.



If your company’s firewall is preventing you from receiving CyberGrants emails, you may need to work with your IT department to establish a Sender Policy Framework, allowing your mail server to accept emails from the Bonterra domain.

Additional Resources

- Help Center accessible from the top right hand user badge in CyberGrants

Additional Training Opportunities

- On-demand Videos available in our [Bonterra Academy](#)
- Additional webinars and training content to come!

Thank you for attending!

We hope to see you
in future trainings.