

Lesson #5 - Emailing Families/Students

Send an Individual Email

There are a few different ways to email an individual family or staff member in Jackrabbit:

- Email button on a *Family* or *Staff* record.
- Email links in multiple locations within Jackrabbit.

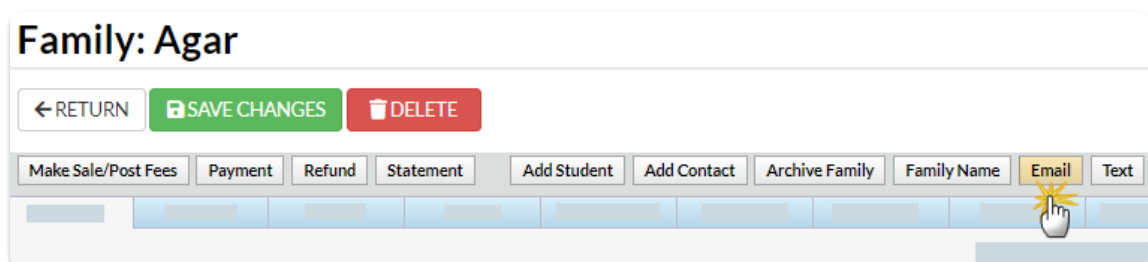


When you are entering the text for your email message, use *Shift+Enter* to create single spacing between lines and the *Enter* key for double spacing.

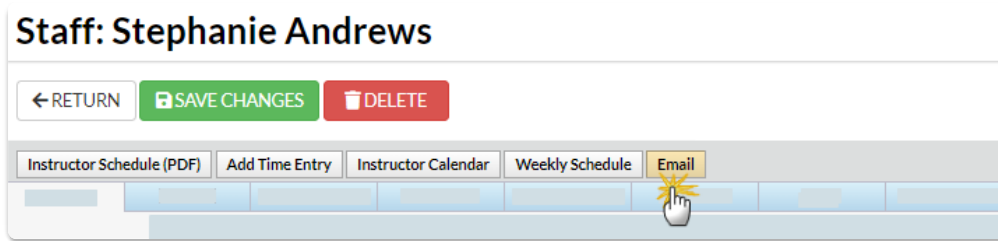
Use the Email Button in Family or Staff Record

To send an individual email from Jackrabbit's email program use the **Email** button located in either the *Family* or *Staff* records.

1. Select the Family or Staff member you would like to email.
2. Click the **Email** button.
 - In a *Family* record - **Select Recipients** from the menu listed: *Send additional email to...*, select *Send replies to...* (emails shown come from the *Gear icon > Settings > General > User IDs > select a User ID > Email*).



- In a *Staff* record - *Email replies sent to* and *Send Additional Emails to* are located below the email message section (*Gear icon > Settings > General > User IDs > select a User ID > Email*).



3. Choose a pre-existing email **Template**, a saved **Favorite**, or create a new email message by choosing one of the following from the **Type** drop-down list:
 - o *Email - Plain Text Email*
 - o *Email - HTML*
 - o Optionally, you can select to send a *Push Notification* (if you use the **Jackrabbit Plus** mobile app) or a *Text Message/Email* (if you have **text messaging** enabled)
4. Add an **Email Subject Line**.
5. Type the email **Message** text.
 - o We strongly recommend you compose your email in the Jackrabbit email editor. If you copy/paste from another application (ie. Microsoft Word) there may be hidden code that will affect the way your email appears to your recipient.
6. Click **Attach File**, **Insert Image**, or **Choose from Dropbox** to attach files and add images if needed. See **Email Attachments and Images** for more details.
7. Click **Preview & Send** (*Family record*) or **Preview List** (*Staff record*).
8. Review the *Matched Recipients* information. Clear the checkbox for any emails you do not want to send.
9. Click **Send Now** to send the email immediately or click **Send Later** to schedule a date/time for the email to be sent. See **Schedule an Email** for more details.
 - o If you selected *Send Now* a green box will display to indicate the email is on its way.
 - o If you opted to *Send Later* you will see a blue box confirming that your email has been scheduled.

A confirmation email is automatically sent from the Jackrabbit mail server to the email address you defined as the reply email (*Email Replies Sent To*). This email is not the 'real' message sent to the customer. It is simply an excerpt (1st 1,000 characters) of the email notifying you that the email was sent and listing the recipients' email addresses.

View Sent Emails on the Misc tab can be accessed from the individual Family or Staff record. Email history is retained for 365 days.



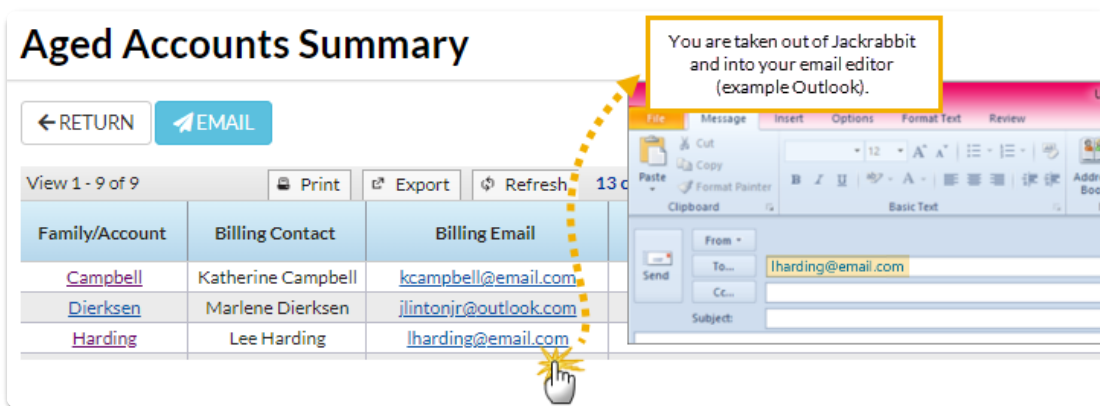
It is not possible for Jackrabbit to indicate if your email was not received or opened by the recipient. However, the **Email Bounce Report** will alert you to emails with certain delivery issues

Use Email Links

In multiple areas of Jackrabbit, a family, contact, student, or staff email address may be linked (underlined & clickable). When you click the email address, Jackrabbit will launch whatever email program is installed on your computer locally (if there is one). **Examples:** *Outlook, Microsoft Mail, Thunderbird, Gmail*. The email program will open a new email with the recipient (To field) pre-filled.

Note: If you have Outlook or another email program installed but not set up, clicking the link may trigger an email client setup wizard and prompt you to specify an email address, etc. Jackrabbit can not assist you with the set up of email programs.

If you access your email via a web-based client (Yahoo, Gmail, Hotmail, etc.) clicking the link may not work, however, the email address may be copied from Jackrabbit and pasted into the web-based email To field.



The screenshot shows the 'Aged Accounts Summary' page in Jackrabbit. It features a table with columns for 'Family/Account', 'Billing Contact', and 'Billing Email'. The 'Billing Email' column contains three underlined, clickable email addresses: kcampbell@email.com, jlintonjr@outlook.com, and lharding@email.com. A yellow callout box points to the first email address with the text: 'You are taken out of Jackrabbit and into your email editor (example Outlook)'. An inset image shows the Outlook 'New Message' window with the 'To' field populated with 'lharding@email.com'. A hand cursor is shown clicking on the 'lharding@email.com' link in the table.

| Family/Account | Billing Contact | Billing Email |
|--------------------------|--------------------|--|
| Campbell | Katherine Campbell | kcampbell@email.com |
| Dierksen | Marlene Dierksen | jlintonjr@outlook.com |
| Harding | Lee Harding | lharding@email.com |



When you use a link in Jackrabbit to create an email it is sent by your email program (as opposed to being sent by Jackrabbit's email program). These emails are **not** tracked in Jackrabbit, there will be no record of that email in *View Sent Emails* on the Family record > Misc tab and it will not be reported in your Jackrabbit email activity. Families will not see those emails in their Parent (Customer) Portals.

Email Families

Jackrabbit offers you multiple ways to email your families. Select the option that works best for your needs.

- ★ Email from the [All Families grid page](#).
- ★ Email from the [Families \(menu\) > Email/Text Families](#).
- ★ Email a single family from a [Family record](#).

There is no limit to the number of emails you can send.



When you are entering the text for your email message, use **Shift+Enter** to create single spacing between lines and the **Enter** key for double spacing.

**Expand/Collapse
All**

- ▢ [Email Families from Families \(menu\) > All Families](#)
- ▢ [Email Families from Families \(menu\) > Email/Text Families](#)
- ▢ [Email a Single Family from a Family Record](#)
- ▢ [Frequently Asked Questions](#)



Emails sent to families will be retained in the family email history for 365 days (Misc tab > View Sent Emails).

Email Students

Jackrabbit offers you multiple ways to send emails and student schedules to your students and families. **Note:** Email Families & Email/Print Student Schedules from the Families category must be selected as the user permission in order to use this functionality. To learn how to update User permissions, see [Manage User IDs](#).

Email Students

Depending on why you are sending the email and which students you want to communicate with, select from one of the following options:

- [Email students from *Families* \(menu\) > All Families, or *Students* \(menu\) > All Students](#)
 - [Email students in all or selected classes from the *Classes* menu > All Classes.](#)
 - [Email students in a single class from the *Classes* menu > All Classes.](#)
-

[Expand/Collapse All](#)

- 📄 [Email Students from All Families or All Students](#)
- 📄 [Email Students in All or Selected Classes from the Classes \(menu\) > All Classes](#)
- 📄 [Email Students in a Single Class from the Classes \(menu\) > All Classes](#)



In addition to emailing students, you can also print their schedules as needed from the **Students** menu > **Students Schedules** > **Print**. Refer to [Email/Print Student Schedules](#) for additional information.

Email Classes

Save time with the ability to compose and send class emails from multiple locations in Jackrabbit. You can also email specific groups directly from the relevant place in Jackrabbit. For example, you can email students on a specific waitlist directly from that waitlist.



When you are entering the text for your email message, use Shift+Enter to create single spacing between lines and the Enter key for double spacing.


[Expand/Collapse All](#)

Click on any location below to learn how to send an email from that location.

- 📄 [Class Record](#)
- 📄 [Waitlist](#)

View Sent Emails

Emails sent from within Jackrabbit are maintained in the system for 365 days. This includes emails sent to families and staff members.

- **Sent to Families** - Emails sent to your Families (contacts and students), either individually through their *Family* record, in mass from the *Families (menu) > All Families > Send Message (icon)* , or from *Families (menu) > Email/Text Families* are found in each *Family* record on the *Misc* tab. Click **View Sent Emails** to see a list of all emails sent in the last 365 days.

Family: Harris

← RETURN **SAVE CHANGES** **DELETE**

Make Sale/Post Fees Payment Refund Statement Add Student Add Contact Archive Family Family Name Email Push Notification Email Schedules Merge Family

Summary Contacts Classes Events Transactions Billing Info **Misc** Notes (1) 1

View Registrations **View Sent Emails**

Contract Start Date Contract End Date

Booster Referral

Emergency Contact Form Completed Enrollment Form Received

Notes

[More...](#)

Source (How they heard about us) Referral Name

Prospect (Not automatically Updated)

Parent Portal Login Message

[More...](#)

Portal Message Expiration Date

- **Sent to Staff Members** - Emails sent to Staff members, either individually through their *Staff* record, or in mass from the *Staff (menu) > Email/Text Staff* are found in each *Staff* record on the *Misc* tab. Click **View Sent Emails** to see a list of all emails sent in the last 365 days.

Staff: Stephanie Andrews


← RETURN **SAVE CHANGES** **DELETE**

Instructor Schedule (PDF) Add Time Entry Instructor Calendar Weekly Schedule Email

Summary Classes Compensation Time Card Portal Settings Feedback Skills Certifications Availability **Misc** Picture Notes (0) Resources

Miscellaneous

View Sent Emails



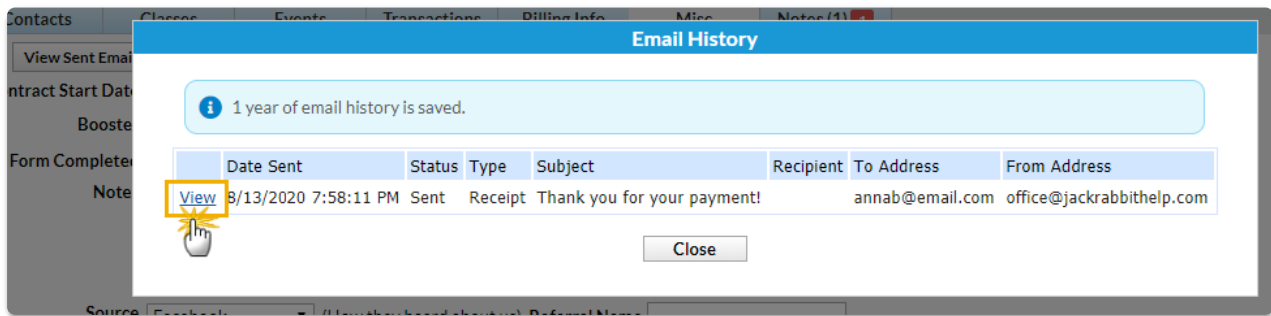
Notes

Stephanie was recommended for the swimming instructor position by a former swim coach in the area. Her credentials are excellent.

Background

High School Diploma 2005
College Graduate with a minor in Child Education in 2009.

Click **View** to open the email for review.



To see all emails sent to your families and staff, use the [Sent Emails Report](#) (*Reports menu > Find Reports > type in Sent Emails and click the search icon*).

Sent Emails Report

The **Sent Emails** report provides you with a list of emails sent to your students, contacts, and staff, based on the filters ([Search Criteria](#)) you select. In addition, incoming emails sent to your organization from the Parent Portal *Contact Us* page are included in this report.

Go to **Reports > Find Reports > Email/Text/Marketing** (left menu) > **Email** (tab) > **Sent Emails**.

- ★ Emails sent from the Lead file are included in this report.
- ★ Report results are viewable by a list of all emails sent or by each recipient.
- ★ Sent emails remain accessible and can be viewed in the system for 365 days.
- ★ Review emails sent to your organization from families using the Parent Portal.



This report does not include automated system-generated emails (e.g., credit card receipts, notification emails) or future scheduled emails.

Search Criteria

You can filter the emails using any or all of the Search Criteria and Jackrabbit will compile the report to meet ALL of the criteria chosen.

The **Display Settings**:

- **Display a row for each email**(default) - will display a list by the subject line of every sent email

for the date range.

- **Display a row for each recipient** - will display a row for each sent email, and the recipients.

Report: Sent Emails

← RETURN

Search Criteria

This report provides details about sent emails. It doesn't include credit card receipts, email notifications, and emails scheduled to be sent later. Use the [Scheduled Email Report](#) to view emails scheduled using the **Send Later** button.

Date from* through*

Email Subject

Email sent by

Display Settings




What type of report do you want?

Display a row for each email

Display a row for each recipient

Report Results

The report results can be further customized to show or hide columns of information, sort and filter columns, or modify column width.

- **View email** - click on the 1st column Row Menu (icon)  to open and view a sent email.
- **Recipients** - click the **Recipients** link to open the **Sent Emails - Detail** for a list of who the email was sent to.
- **Refresh the data** - click the **Refresh Grid** (icon)  to refresh the data in the grid.
- **Export to Excel** - click the **More** (icon)  to export the data in the grid to Excel.

If you select **Display a row for each recipient** as the **Display Setting**, there will be one row for every recipient for all the emails sent.

Refer to [Work with Grids \(Tables\) in Jackrabbit](#) for more information.

Sent Emails - Summary

← RETURN

ALL EMAILS >

Showing 3 of 3 Emails [HELP WITH GRIDS](#)

Drag a column header and drop it here to group by that column

| | DATE SENT | EMAIL SUBJECT | RECIPIENTS | EMAIL TYPE | SENDER |
|--|----------------------|------------------------------------|------------|----------------|------------------------------|
| | Sep 20, 2023 3:59 PM | Bring a friend to class | 14 | Email Families | education@jackrabbittech.com |
| | Sep 20, 2023 3:58 PM | Payments are Due for Fall Festival | 14 | Email Families | education@jackrabbittech.com |
| | Sep 20, 2023 3:57 PM | Leather Closing | 59 | Email Families | education@jackrabbittech.com |

Export to Excel

Number of people the email was sent to.

Click a row menu to view the sent email.

Increase Your Email Delivery Rate

Jackrabbit sends out a large number of emails for our clients every day. A question we sometimes hear is, "Why are some of my customers not receiving emails?" It is important to understand the process of email before working towards a solution!

Before getting started, it's even *more* important to understand what you can do to avoid problems with delivery rates.

What You Should Avoid

- ✗ **Bad content:** Avoid ALL CAPS and exclamation points !!!!! Don't use **red font** when drafting your email; this is a common trick used by spammers.
- ✗ **Issues with HTML:** When composing emails, it is sometimes tempting to save time by converting Microsoft Word files to HTML, but this should be avoided because it can corrupt HTML. Broken HTML is a red flag for spam and will be sloppy and unreadable by most email clients.
- ✗ **One big image:** creating an HTML email containing an image with little or no text. Spam filters can't read images and will assume you're a spammer trying to trick them.
- ✗ **Spam words:** Act Now, Percent Off, Free Offer, etc. Check out this great Hubspot article [The Ultimate List of Email SPAM Trigger Words](#).



One of the most common causes of spam complaints from recipients is failure to recognize the sender of the message. See [Add Jackrabbit to Safe Senders List](#) for more information.

Understand the Email Process

Let's look at the route an email takes:



Step 1: Create and send an email

You compose and send an email in Jackrabbit, directing the email to our server.

Step 2: Jackrabbit servers process the email

The email is queued and sorted with financial emails (e.g., statements and receipts) being flagged as a higher priority. The email status will show in your system as *Pending*.

The emails are then sent to one of Jackrabbit's servers. The server processes and releases the email. As soon as it is delivered, the email will show as *Complete* in your system. The email is considered successful and is no longer controlled by Jackrabbit.

Step 3: The email travels via the internet

Now the emails are released to the internet, passing through several routers. A server examines the *to* address for validity and sorts it in the right direction. The *from* address is checked for good standing and to ensure it is not blacklisted.

Step 4: The email searches for its destination

As an email reaches the domain address, the receiving server must process it. Many emails are rejected because they look like spam. The domain server may also determine that the specific recipient doesn't live there. Different domain servers have different rules and different filter strictness.

Step 5: The email reaches its destination

If the email is successfully processed above, it is forwarded to the recipient's email program. It must pass through any rules or filters the recipient's email program (Outlook, Gmail, etc.) uses and any

filters the recipient applied in their personal settings. Even though the email made it to the recipient's email program doesn't mean the email is sitting in their Inbox. It could be in another folder, including the *junk* or *spam* folder.

Improve Your Deliverability Rate

Your deliverability rate is the percentage of emails sent that are delivered to the recipient. The recipient's ISP and personal settings are the largest determination of your deliverability rate. However, you can take action to increase the likelihood of emails arriving at their destination.

- ✓ Remove non-existent and undeliverable email addresses from your system. Reference the [Email Bounce](#) report.
- ✓ Stay current with email communication best practices to avoid triggering spam filters.
- ✓ Honor email opt-outs when sending mass marketing emails. Only include [opt-outs](#) for important notices like weather closures.
- ✓ Use a recognizable *from* email address and name, accompanied by a clear and relevant subject line. The subject line could prevent email providers from sending your email.

Troubleshoot Problems with Email

There are many reasons why an email can be prevented from making it to the recipient. Use Jackrabbit to help you find out why customers aren't receiving your emails.

Reasons an Email May Not be Received

Unfortunately, there are multiple reasons why an email isn't received. Many issues cannot be researched by Jackrabbit, but these are some of the most common issues:

- The email was sorted into the recipient's spam folder. The recipient doesn't know they received it.
- The email was automatically deleted by the recipient's personal Spam rules.
- The recipient's Inbox is full and won't accept any more emails until some are deleted.
- The recipient no longer uses that email address.
- The recipient's Internet Service Provider (ISP) refused to deliver the email because the ISP thinks it is spam.
- The email address is not typed correctly.
- The email address is the contact's business email address. Some businesses block 3rd party redirected emails. Jackrabbit emails fall under this category.



If a family uses a business email address, have them ask their IT department to allow redirected emails from Jackrabbitech.com.

Troubleshoot Email in Jackrabbit

Jackrabbit allows you to easily email **families individually** or in a **large group**. When you have problems with emails check the following to help troubleshoot the issue:

- The **family record** shows if the contact has **opted out of mass emails**.
- The **family record** holds a copy of emails sent to the family over the last 365 days. Check the status of an email sent to the family using the **View Sent Emails** button.
- The **Email Bounce** report provides a list of bounced email addresses to inform you of those returned to our server with an error.
- The **Parent Portal** allows contacts to view all emails you have sent to them over the last 365 days. Even if the email didn't successfully make it to the contact's Inbox, they can still view a copy here.
- Use the **Sent Emails Report** to see a list of emails sent to your students, contacts, and staff during a specified timeframe.



Encourage families to add **noreply@jackrabbitech.com** to their email contacts. This will help their email provider realize emails from Jackrabbit are not spam.

Sending a mass email uses Jackrabbit's Internet Service Provider (**ISP**), which can be seen as spam by the recipient's ISP and block it from being delivered.

The correct domain name and IP address **must** be used. Refer to **Add Jackrabbit to Safe Sender List** for more information and a complete list of our IP addresses.

Use Email Best Practices

Sending emails is the best way to communicate with a number of families at one time, especially when you have important information to share. How can you ensure that families are receiving emails?

- Create the habit of running the **Email Bounce** report after sending an email. This helps you identify bounced emails immediately instead of waiting for families to report the issue.
 - Remove invalid email addresses (found on the Email Bounce report) from **contact records** in Jackrabbit to avoid future bounces.
 - Send a test email to a contact's email address after removing them from the Email Bounce report to make sure emails are delivered.
-

Expand/Collapse All

Frequently Asked Questions



Emails can now be accessed through so many devices. It only takes one instance of reporting Jackrabbit emails as junk to stop delivery. Your customers should check all of their devices to see if your emails have been sent to the Junk or Spam folders by mistake.

Email Bounce Report

This report, found under the *Reports (menu) > Find Reports > Email/Text/Marketing > Email (tab) > Email Bounce Listing*, is a tool to assist you in identifying email addresses that are repeatedly undeliverable. Use the list to identify which email addresses need to be corrected in order for future emails to be delivered.



If you do not see this report option under the *Reports* menu, check your user permissions. (Gear icon > Settings > Users & Permissions > select a User > User Permissions left menu > Reports Category: Email Bounce Report).

| Email Bounce Report | | | | | | | | | | | | |
|--|-----|-------------------|----------------------------------|-------------------------|------------|-----------|------------------------|--|-----------------|------------------------|------------------------|-------------------------------------|
| ← RETURN | | | | | | | | | | | | |
| View 1 - 13 of 13 Print Export Remove Columns | | | | | | | | | | | | |
| | Loc | Email Address | Current Status ? | Type | First Name | Last Name | Family | Home Phone Work Phone Cell Phone | Failed Attempts | Most Recent Bounce | First Bounce Date | Remove |
| 1 | EDU | tlovell@email.com | Invalid Recipient | Contact | Tobi | Lovell | Lovell | (704) 555-4955 | 1 | 4/6/2020 2:26:25 PM | 4/6/2020 2:26:25 PM | <input type="checkbox"/> |
| 2 | EDU | jhunter@email.com | Invalid Recipient | Contact | Jolie | Hunter | Hunter | (704) 555-1248 | 1 | 4/6/2020 2:19:10 PM | 4/6/2020 2:19:10 PM | <input type="checkbox"/> |
| 3 | EDU | kbowden@email.com | Invalid Recipient | Contact | Karsen | Bowden | Bowden | (704) 555-4773 | 1 | 4/6/2020 1:13:42 PM | 4/6/2020 1:13:42 PM | <input checked="" type="checkbox"/> |

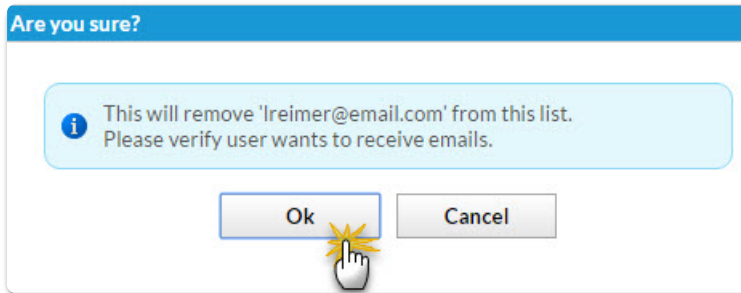
Click here for status definitions.

A direct link to the Family record allows you to make corrections quickly.

Once you have identified and corrected the problem, select the Remove check box to clear the email from the report.

The report lists the *Email Address*, *Current Status* (see *Status Definitions* below), *Type*, *First & Last Name*, *Family Name*, telephone numbers, # of *Failed Attempts*, as well as *Most Recent* and *First Bounce* time stamps.

Use the *Remove* checkboxes to clear the email address from the report once your corrections have been made. You will be asked to confirm that the owner of the email address wishes to receive email communications from you.



We recommend you run this report frequently and remove any blocked email addresses. If you check the box in the *Remove* column, the email address will be removed from the report after you make corrections.

Status Definitions

| | |
|--------------------------|--|
| Bounced | Undeliverable; possible reasons could be an invalid domain or user, or that the user's mailbox is full or not accepting emails |
| DNS Problem | Unable to find the domain for the email address |
| Rejected | Rejected by the email service because the address was previously undeliverable |
| Undetermined | The response text could not be identified |
| Invalid Recipient | The recipient is an invalid email address or the error could not be determined |
| Soft Bounce | The message soft bounced |
| DNS Failure | The message bounced due to a DNS failure |

| | |
|--------------------------------|--|
| Mailbox Full | The message bounced due to the remote mailbox being over quota |
| Too Large | The message bounced because it was too large for the recipient |
| Timeout | The message timed out |
| Admin Failure | The message was failed by SparkPost's configured policies |
| Generic Bounce: No RCPT | No recipient could be determined for the message |
| Generic Bounce | The message failed for unspecified reasons |
| Mail Block | The message was blocked by the receiver |
| Spam Block | The message was blocked by the receiver as coming from a known spam source |
| Spam Content | The message was blocked by the receiver as spam |
| Prohibited Attachment | The message was blocked by the receiver because it contained a prohibited attachment |
| Relaying Denied | The message was blocked by the receiver because relaying is not allowed |
| Auto-Reply | The message is an auto-reply/vacation email |
| Transient Failure | Message transmission has been temporarily delayed |

| | |
|---------------------------|---|
| Subscribe | The message is a subscribe request |
| Unsubscribe | The message is an unsubscribe request |
| Challenge-Response | The message is a challenge-response probe |

Add Jackrabbit to Safe Sender List

In order to help ensure proper delivery of emails to your customers, they can add your organization to their *Safe Sender* or *Approved* list also referred to as a Whitelist.

Curious how to whitelist? Or tell your customers how to whitelist? Here is a great reference page to share with them: [How to Whitelist Email](#).

Jackrabbit Email Server IP Addresses

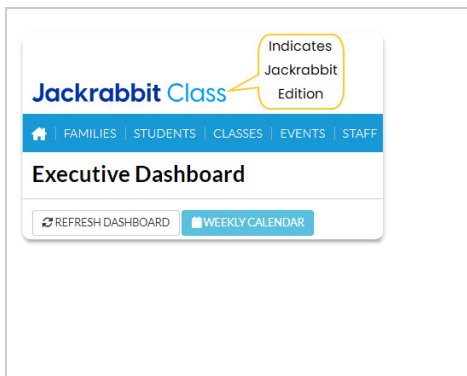
All emails generated and sent from Jackrabbit are processed through our servers. For your reference our domain is **jackrabbittech.com** and our email servers IP addresses are:

| | | |
|---------------|----------------|----------------|
| 50.112.150.23 | 52.43.181.109 | 192.174.90.254 |
| 52.43.115.229 | 192.174.90.253 | 192.174.90.255 |

Practice - Emailing Families/Students

Want to practice what you've just learned? Great!

- Go to <https://app.jackrabbitclass.com/jr4.0/Login> and log in with the credentials below for your Jackrabbit edition.
- Go through some or all of the practice scenarios below as they apply to you.



| Edition | User ID | Password |
|---------|-----------|-----------|
| Cheer | LMSCheer | Training1 |
| Class | LMSCClass | Training1 |
| Dance | LMSDance | Training1 |
| Music | LMSMusic | Training1 |
| Swim | LMSSwim | Training1 |



The Practice Database is refreshed each day at approximately 5:00 am Eastern Standard Time. Anything you enter will be erased at that time.

Send an email.

[Families > All Families](#)

[Families > Email/Text Families](#)

QUIZ - Lesson #5 - Emailing Families/Students

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #5 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent.

Quiz #5 - Emailing Families/Students

TAKE THE QUIZ

| Number of Questions | Total Possible Points | Points Needed for an "A" | Points Needed for a "B" | Points Needed for a "C" |
|---------------------|-----------------------|--------------------------|-------------------------|-------------------------|
| 6 | 6 | 5 | 4 | 4 |

- [Return to Front Desk Staff Menu to continue to next lesson](#)
- [Click here for more in-depth training \(Supervisors and Managers - Lesson #13 - Emailing\)](#)
- [Click here to provide feedback for this lesson](#)

Optional Topics - Lesson #5

Review the following articles if they apply to your position.

Customize a Jackrabbit Email Template (Classic Editor)

Jackrabbit offers a wide selection of professionally designed email templates, featuring full-color graphics and standard wording. These templates (101 and greater) were created in the classic editor and must be edited using that editor. To access and customize them, go to the **Gear** icon > **Settings** > **Email Templates**.

Many templates include placeholder images for your business logo, which can be effortlessly replaced with your own company logo to fit your brand identity. Note: Some of the information in the templates is sample content. Make sure you change all of the dates, times, locations, etc., in a template before you send it.



We now offer a new email template editor with drag-and-drop functionality, making it even easier to design email templates! We've created a template with the new template editor (100 Newsletter), which can be customized to suit your needs. Learn more about [Creating Custom Email Templates](#) in

the new editor.

[Expand/Collapse All](#)

- [Customize or Edit an Email Template \(Classic Editor\)](#)
 - [Add a Link to Your Parent Portal in an Email Template \(Classic Editor\)](#)
 - [Add Your Organization's Logo in an Email Template \(Classic Editor\)](#)
-

- [Frequently Asked Questions](#)

Zippy AI - Your Jackrabbit Email Assistant

Step up your email game with **Zippy AI**. Say goodbye to writer's block and hello to effortless communication!

Zippy AI is an artificial intelligence-powered email assistant available in the email editor in Email/Text Families (from the Families menu). It helps you craft emails with ease, saving you time and energy. Whether you're a seasoned AI pro or just getting started, this article will walk you through everything you need to know about using Zippy AI to compose emails like a champ.

- ★ Enhance customer engagement with captivating emails.
 - ★ Increase efficiency; let AI craft your messages in seconds.
 - ★ Personalize messages with class-specific details that Zippy AI pulls from the Class record.
-

There are three steps to writing a message with Zippy AI.

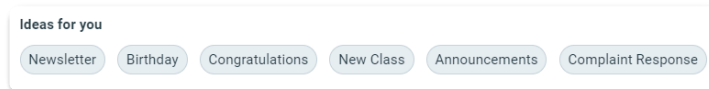
Prompt

Prompts are instructions or questions used to tell Zippy AI what kind of email you want to compose and what information to include.


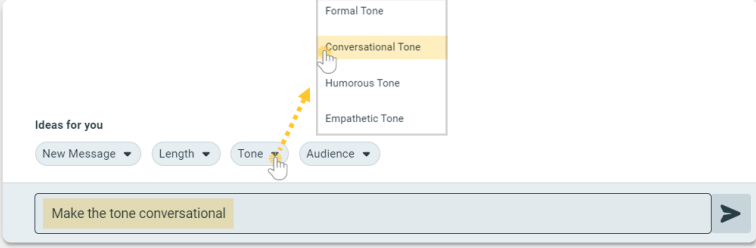

Some examples of what you could ask Zippy AI are:

- "Compose an email to announce our upcoming dance recital."
- "Write an email about our new Advanced Tumbling class."

Several ideas are provided that will pre-fill the prompt for you: Newsletter, Birthday, Congratulations, New Class, Announcements, or Complaint Response.



If you are composing an email about a specific class, select the class from the drop-down, and Zippy AI will automatically retrieve and insert relevant class details from the Class record directly into your email.

| | |
|-------------------------------|---|
| | <p>Retry</p> <ul style="list-style-type: none"> Use the Retry button to reject the initial draft and generate a completely new draft of the message using your original prompt.  <p>or</p> <p>Revise</p> <ul style="list-style-type: none"> Use the ideas for Length (Shorten, Lengthen), Tone (Formal, Conversational, Humorous, Empathetic), and Audience (Family, Parent, Student), add further instructions in the <i>Ask Zippy to write any type of message</i> field, or do a combination of both to generate a revised draft.  <p>or</p> <p>Restart</p> <ul style="list-style-type: none"> Bypass the draft completely and start a new message using the New Message option in the <i>Ideas for you</i> section. |
| <p>Use the Message</p> | <p>When you are happy with your revisions, select Use this message to copy the message into the email editor. There, you can customize it further by replacing any brackets and placeholder text with your own information, adding a Subject line, changing any brackets and placeholder text to your own details, adjusting formatting, and making any other changes you need. Remember to double-check your email before sending it! Zippy is here to help with accuracy and efficiency but might occasionally miss something or make a small mistake.</p>  |



Step Through an Example



All features may require the use of certain user data to function properly. We are committed to protecting your privacy and ensuring data security. [Review our Privacy Policy](#).

Upload and Manage Jackrabbit Files

Jackrabbit offers 1GB of file storage free of charge! The types of files that can be stored and added to your emails are:

- **Image Files** - Restricted to web compatible types ending in: .jpg, .jpeg, .gif, and .png.
- **Files Attachments** - Allowable extensions: .txt, .pdf, .doc, .docx, .xls, .xlsx, .ppt, .pptx, .zip, .rar, .avi, .mov, .mp3, .mp4, .jpg, .jpeg, .gif, .png, .tiff, and .bmp.

It's easy to upload files. In the email *Message* section click either of the *Jackrabbit files* **Attach File** or **Insert Image** buttons and then drag the file you want to upload from your computer into the blue box in the **Attach File** window. Alternatively, you can click the text "**Click here to choose a file**" to see a traditional file browser where you can select the file to upload.



The User ID must have the permission Tools: Upload a File in order to see the Upload Files section.

The screenshot shows the 'Message' section of an email composition interface. At the top, there are buttons for 'Favorites', 'Save Favorites', 'Refresh', and a help icon. Below these are fields for 'Template' (with an 'Edit Email Templates' button), 'Type' (set to 'Email - HTML'), and 'Subject line'. The main area is a rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, insert image, and source code. The text area contains a single paragraph 'p' and a character count of '10000 characters left'. A 'Pro tip: For single spacing, use Shift+Enter' is displayed at the bottom right. At the bottom, there is a 'Jackrabbit files' section with 'Attach File' and 'Insert Image' buttons highlighted by a yellow box, and a 'Dropbox attachment' section with a 'Choose from Dropbox' button and a help icon.

Once a file has been uploaded, it will appear in the bottom section. Use the *Select Files* filter to quickly locate an uploaded file or sort by *Date*, *Name*, or *Size*.

The screenshot shows the 'Attach File' interface. At the top, there is a blue header with the text 'Attach File'. Below the header, there is a section titled 'Upload files:' with a dashed border and a large upward-pointing arrow icon. A callout bubble points to this area with the text: 'Use *Select files* to quickly locate an uploaded file.' Below the arrow icon, there is a link: 'Click here to choose a file' or drag it here to upload.

Below the upload area is a section titled 'Select files:'. It features a search input field with the placeholder text 'type part of a filename' and a 'Filter' button. To the right, there are three sort options: 'DATE', 'NAME', and 'SIZE', with 'DATE' selected. Below the search and filter options is a table of files:

| File Icon | Filename | Date | Size | Actions |
|-----------|------------------|------------|---------|---------|
| | emailsupport.png | 11/27/2016 | 7.5kB | |
| | emails.jpg | 11/27/2016 | 513.3kB | |

A callout bubble points to the red 'X' icon with the text: 'Hover over a file to display the "X" icon to delete the file.' Below the table, there is a progress bar and the text 'File Space Used: 4.7MB/1.0GB'. A callout bubble points to the progress bar with the text: 'Available space for additional files.' To the right of the progress bar, it says 'Total Files: 70'. At the bottom, there are two buttons: 'Attach File' and 'Cancel'.

The progress bar indicates how much of your allotted space (1 GB) has been used. Periodically remove older files to free up space. To delete a Jackrabbit File hover over the file icon and click the 'X' icon. **Note:** *The User ID must have the permission Tools: Delete a File in order to see the 'X' icon.*



Images can be resized once inserted into the email by dragging the corner to adjust the size. It is a good idea, however, to resize them PRIOR to uploading them so that you do not use up your cloud storage unnecessarily.

Schedule an Email to be Sent at a Later Time


Emails can be scheduled up to 90 days in the future using the *Send Later* button on the email *Preview* screen.

When you preview an email that was created in Jackrabbit, you have the option to send the email immediately or schedule the email to be sent at a later date/time.



An email scheduled to be sent on a future date will only include recipients that matched your selection criteria at the time you created the email. It is not updated, prior to being sent, to include any students who enrolled after you created the email, nor will it exclude any students who may have dropped since that date.

Schedule Email to be Sent Later

1. Go to the **Families** menu > **All Families**.
 - o All your families will display in the grid.
 - o Use the filter, when applicable, to narrow down the family list.
 - o Leave the 1st column in the grid unchecked to select all families or check the boxes for the families to be included in the email.
2. Click the **Send Message** icon  and define the audience in the pop-up window.
3. Click **Select**.
4. Compose your email and select the additional **Recipients** from the list shown.
5. Click **Preview List**.
6. Clear the checkbox for any email address you don't want to receive the email.
7. Select **Send Later**.

Preview

← RETURN SEND NOW SEND LATER ?



Results

Deliver To: Contacts, Students, and Instructors
Email Replies Sent To: cb@jackrabbittech.com
Subject: Bring a Friend
Message: [Hide Message](#)



Message Length: 0

Matched Recipients

View 1 - 18 of 18

Print

Export

Refresh

| Type | Acct/Family Name ¹ | Balance | Name | Email | Check All |
|------------|-------------------------------|---------|-------------------|-----------------------|-------------------------------------|
| Instructor | | | Dianne Harris | dilinth@gmail.com | <input checked="" type="checkbox"/> |
| Instructor | | | John Linton | jlintonjr@outlook.com | <input checked="" type="checkbox"/> |
| Instructor | | | Stephanie Andrews | standrews@gmail.com | <input checked="" type="checkbox"/> |
| Contact | Ager | 168.12 | Holly Ager | hollyager41@gmail.com | <input checked="" type="checkbox"/> |
| Contact | Ager | 168.12 | Victor Ager | agingvictor@gmail.com | <input checked="" type="checkbox"/> |
| Contact | Bowden | 0.00 | Karsen Bowden | kbowden@email.com | <input checked="" type="checkbox"/> |

8. Select the **Date** and **Time** you want the email to be sent.

Note: The email will be sent based on the Time Zone designated under the Gear icon > Settings > General > Organizational Defaults (left menu) > Time & Date Settings.

Email - Send Later

Send Later Details

Deliver To: Contacts, Students, and Instructors
Email Replies Sent To: cb@jackrabbittech.com
Subject: Registration Open

When do you want to schedule this email?

Jackrabbit can send this email up to 90 days from today. Pick a date and time below. ?

Date Time

This email will be sent based on (GMT-05:00) Eastern Time (US Canada).

9. Click **Send Later**.

You will receive a confirmation that your email has been scheduled.

Your email is scheduled to be sent 12/31/2021 09:00 AM

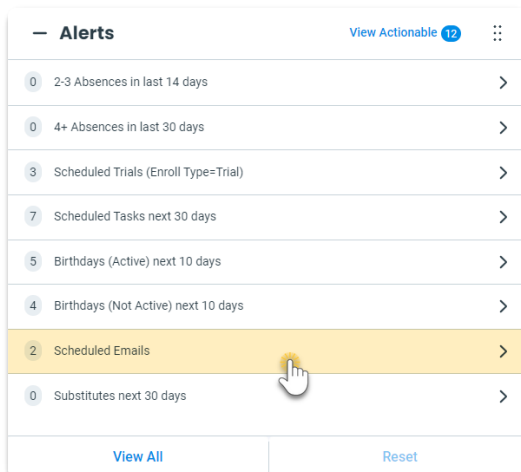
Preview, edit, or cancel this email before the scheduled Date/Time by going to [Scheduled Emails](#)

When your email is on the way, you'll be sent a confirmation email listing all the recipients.

Preview, Edit, or Cancel a Scheduled Email

The **Scheduled Emails report** includes icons that allow you to edit the email content, preview the list of recipients, reschedule the email and delete the email.

A *Scheduled Emails* alert on the Executive Dashboard keeps you informed of pending scheduled emails. Click the alert to access the Scheduled Emails report.



You can also get to the Scheduled Emails report from the *Reports (menu) > Find Reports > Email/Text/Marketing (left menu) > Emails- Scheduled*.

Reports

← RETURN

Q FIND A REPORT

♥ MY REPORTS

NEW REPORTS

ALL REPORTS

Browse Reports

FAMILIES / STUDENTS

CLASSES / ENROLLMENT

EVENTS / RECITALS

STAFF

TRANSACTIONS / FINANCIALS

STORE

STAFF PORTAL

EMAIL / TEXT / MARKETING

COSTUMES

Email / Text / Marketing Reports

Recommended | **Email** | Labels

[Email Bounce Listing](#)

[Email Listing](#)

[Emails - Scheduled](#)

[Sent Emails](#)

[Source/Referral Report](#)

[Telephone Listing](#)



The User ID permission "Emails - Scheduled" (in the Reports category of permissions) controls a User's access to scheduled emails. Edit a User's permissions from the Gear (icon) > Settings > General > User IDs (left menu).

The Scheduled Emails report lists all emails scheduled using the *Send Later* button. The current status of the email (*Scheduled* or *Complete*) is displayed along with the number of recipients, the type of email (where in Jackrabbit it was created), the email subject, date/time information, and the User ID of the person who created the email.

Scheduled Emails

← RETURN



Emails scheduled using the "Send Later" button are listed below.

View 1 - 2 of 2 Print Export Refresh

| | | | | Current Status | # Recipient | Email Type | Email Subject | Date/Time Scheduled | Date/Time Sent | User ID |
|--|--|--|--|----------------|-------------|----------------|--------------------------|---------------------|----------------|------------|
| | | | | Search | Search | Search | Search | Search | Search | Search |
| | | | | Scheduled | 1 | Email Families | Bring a Friend to Class! | 6/12/2024 05:00 PM | | HBarnhardt |
| | | | | Scheduled | 6 | Email Families | We want your feedback | 6/5/2024 08:00 AM | | HBarnhardt |

Use the icons to work with the scheduled email.

| | |
|--|---|
| | Use the Pencil icon to open the email editor where you can edit the content of the email. |
| | The Eye icon opens the <i>Preview Scheduled Email</i> page where you are able to remove recipients (or add back previously removed recipients). Once the email has been sent (status = <i>Completed</i>) the eye icon opens a view of the sent email. |

| | |
|---|---|
|  | Click the Send icon to open the <i>Send Email</i> window where you can reschedule the date and time or choose to Send Now. |
|  | Use the Trash Can icon to stop the email from being sent at the scheduled date/time and delete the email's contents. |



While you can't add any **new** recipients to a scheduled email, you can remove recipients that are scheduled to receive the email or add back recipients that you removed in a previous edit to the recipients of the scheduled email.

QUIZ - Optional - Lesson #5 - Emailing Families/Students

When you have worked through all of the articles outlined in the lesson, select the Take the Quiz button to be taken to the Lesson #5 Quiz where you can test your understanding of the concepts in this lesson. You will be asked to enter an email address for quiz results to be sent.

Quiz #5 - Optional - Emailing Families/Students

TAKE THE QUIZ

| Number of Questions | Total Possible Points | Points Needed for an "A" | Points Needed for a "B" | Points Needed for a "C" |
|---------------------|-----------------------|--------------------------|-------------------------|-------------------------|
| 5 | 5 | 4 | 4 | 3 |

[Return to Front Desk Staff Menu to continue to next lesson](#)

[Click here for more in-depth training \(Supervisors and Managers - Lesson #13 - Emailing\)](#)

[Click here to provide feedback for this lesson](#)

