



Emails and Grouping in Ultracamp

Confirmation Email Templates

<https://help.ultracamp.com/hc/en-us/articles/7229139748884-Confirmation-Email-Templates>

Settings > Communication > Confirmation Templates > Add or Edit

- Once completed, be sure to connect this with your session template that is associated with this email confirmation. Many sessions can use one email template.
- TIP: This is a receipt and confirmation of their registration. The more generic this is, the more sessions can use it. If you need to make it more customizable, you will need to add or update your session template(s).

Creating Email Templates

<https://help.ultracamp.com/hc/en-us/articles/9973916676372-Email-Templates#email-templates-0-0>

Settings > Communication > Email Templates

- Create or edit an email template
- Choose a name, subject line, add the header, and create the body of the email with the provided formatting buttons.
- Attachments you can add to emails can include Documents, tax receipts, and/or Financial Statements

Sending an Email to an Individual

<https://help.ultracamp.com/hc/en-us/articles/7259929595412-Send-an-Email#send-an-email-0-0>

- If you need to send an email to an individual, go to their account > choose send an email via Ultracamp in the bottom right OR click on their email address to be redirected to the send an email screen.
- You can then choose your email template, subject line, and choose email address (must be a department email) you want to use and fill in any other settings you would like to include. Preview and then send.

Account Summary

Primary Contact: **Primary Test**
 Account Balance: **\$0.00**
 Payments Scheduled: **\$0.00**
 Current Reservations:

Common Tasks

- [Make / Record a Payment >>](#)
- [Make a Reservation >>](#)
- [View Financial History >>](#)
- [Print Financial Statement >>](#)
- [Add a Person to this Account >>](#)
- [Send an Email via UltraCamp >>](#)
- [Send an Email \(External\) >>](#)

Account Informatic

Primary Contact / Org

Account Members

Name

Primary Test

Secondary Test

Another Test

Callie Bramley

Will Bramley

Teengirl Test

Youngboy Test

Otis Bramley

Luna Bramley

Reservations

This account does not h

Send an Email

Complete the information below.

Email Templates

Load an Email Template

-- Select Template --

[Save as new template](#)

Send Information

Subject:

From:

kbramley@bw.edu

CC:

To:

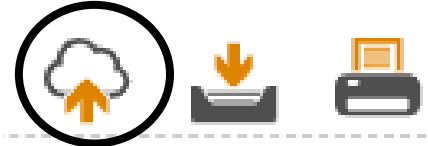
- Primary Test - kbramley@bw.edu (Primary Contact)
- Secondary Test - kbramley@bw.edu (Secondary Contact)
- Another Test - kbramley@bw.edu
- Callie Bramley - kbramley@bw.edu
- Will Bramley - kbramley@bw.edu
- Teengirl Test - kbramley@bw.edu

Creating a Stored Group

A Stored Groups is a static snapshot of data taken from a report's returned information. Stored Groups have a variety of uses within UltraCamp, ranging from filtering to large scale communication. In addition to saving report return information in the database, UltraCamp can also export returned information in Excel/CSV and PDF formats.

<https://help.ultracamp.com/hc/en-us/articles/7259298092436-Storing-Groups-and-Exporting#store-this-information-0-2>

- First decide what group you want to store, this could be a roster of a group of one session, it could be from a list of participants who owe a balance, or other types or reports. Under Reports, the following can create a stored group:
 - o Rosters
 - o Reservations
 - o Biographical
 - o Correspondence
 - o Financial
 - o Arrivals/Departures
 - o Forms
- You will go to that roster or report of the group you want to save.
- Make any needed filter to run that roster or report > Hit Search
- Go to the top right of the roster or report and choose the cloud with up arrow icon.
- This will provide a pop up to save this Group.
- File Name: department, category, and then topic
 - o (Examples: CAS – Dance – Ballet, STEM – Math Camp, DCL – Staff – Background Checks)
- Export Type: Stored Group
- Visible to All Users: You will then choose if this group can be visible to you or all users.
- Permanently Save: You will then choose if this is a temporary group or a permanent group. *Temporary groups are in the system for 24 hours.* If you are sending a quick email to a stored group, you can make it temporary. If you will send additional emails to this group in the future, you can permanently save.
 - o **Note: This is a static, one-time snapshot of your stored group. It will not update if more participants meet the criteria of that group. You would need to run the roster or report again and override the saved group. If you need an ongoing list, a saved custom report would fit better.**
- Save Stored Group - you have now created a stored group.



Creating a Saved Custom Report

Reports > Create a custom report or edit existing in Custom Report folders

- Pull any details into the report you would need for the email. Be sure to include one of the following fields: idAccount, idPerson or email
- Use Filters to filter down who should be included in this report
- Save report and name it (Department – Category/Topic)
 - o **Note: This is a living/on-going report. It will update if more participants meet the criteria of that report. You would not need to create a new report if you want additional individuals to be added. If you do want a static list that does not change, a saved group would fit better.**

Emailing a Group or Session

<https://help.ultracamp.com/hc/en-us/articles/7257637818644-Send-a-Group-Email-#mass-email-0-1>

Tools > Correspondence > Email a Stored Group

- To email a group, you must have a stored group saved OR a saved custom report that has idAccount, idPerson or email in the report. Use directions above.
- Once you have a stored group, go to Tools > Correspondence > Email a Stored Group
- Choose Email a Stored Group or Email Individuals in a Report.
- **Email Individuals in a Report**
 - o Choose report
 - o Choose Template
 - o Type in Subject Line
 - o Choose email address (must be a department email)
 - o Choose any other settings > Next
 - o No, this is not a marketing email > Next
 - o Make any edits to your template
 - o Choose Attachments or Upload Additional File
 - o Preview and then Send Email
- **Email a Stored Group**
 - o Choose Stored Group
 - o Choose Template
 - o Type in Subject Line
 - o Choose email address (must be a department email)
 - o Choose any other settings > Next
 - o No, this is not a marketing email > Next
 - o Make any edits to your template
 - o Choose Attachments or Upload Additional File
 - o Preview and then Send Email

Texting a Group (Will turn on for Summer 2024)

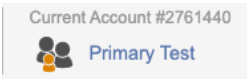
<https://help.ultracamp.com/hc/en-us/articles/7257717414932-Phone-and-SMS-Text-Broadcasts-#sending-an-sms-text-broadcast-0-5>

Tools > Correspondence > Phone / Text a Stored Group

- Choose a Stored Group
- Create Broadcast Name: This is the name or title for the message and is required.
- Description: Optional, can be used for log purposes but has no impact on actual message
- Send Date: Default will go out 15 minutes after you hit send. You can adjust time to a specific time in the future.
- Click SMS Broadcast checkbox
- Type Text Message (Up to 160 characters)
- Send to: Choose phone number
- If this is an emergency SMS: Click Emergency SMS
- SEND

Account Correspondence History + Resending Emails

- Go to account and at the top of page click on the account detail icon that looks like three people.



- From there click on the message bubble shown below.

Current Account



Account #: 2761440

Account Balance: \$0.00

- Review sent emails, record a new correspondence, or send a new email.
- To resend: find the email you want to resend and click on the binoculars on the right > a pop up will take you to the email and you will click the envelope symbol next to the resend to: email.

OR

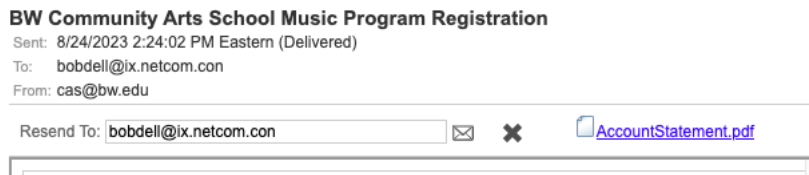
Reports > Correspondence > Email Correspondence

- Put in filters of the email to resend and/or the Account that needs the email resent > search
- Find the email you want to resend > a pop up will take you to the email and you will click the envelope symbol next to the resend to: email.

Email Reporting

Reports > Correspondence > Email Correspondence

- Put in filters to review emails in a certain date range, subject line, or send status > Search



- o Send Status includes: Awaiting Pickup, Delivered, or Send Error.

Texting Reporting

Reports > Correspondence > Phone/SMS Broadcast History

- Put in filters to review emails in a certain date range, type, or status > Search