Introductory Email Information

We send several introductory emails to new organizations to help them get started in a streamlined way. In response to our users, we have copied those emails into our guides so our users can reference them at a later time

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On this page:

Email 1- Welcome and Overview

Welcome to the RescueGroups.org **Data Management Service**! We're proud to add the service to your RescueGroups.org account for you. We hope that you're looking forward to expanding your capabilities for animal management and we appreciate the trust you've put in us.

Please expect an email from us very soon with setup instructions. Remember to bookmark our **Getting Started with Data Management Service** section of the **Data Management Service guide**.

If you are new to RescueGroups.org, you're also going to want to read the **Getting Started with RescueGroups.org** guide. **NOTE:** If you just created your RescueGroups.org account, you should have already received an email with the login information for your new service: your account number, username, and password.   If you do not receive that email within an hour, please let us know by opening a support ticket at: http://www.rescuegroups.org /support.

If you already have an account with us and are upgrading your service, continue to log in by browsing to https://rescuegroups.org and clicking the **Login** button at the top of the page.

Thank you for being a part of our team of shelters and rescue groups! To learn more about our other services for rescue groups and shelters, visit: https:// www.rescuegroups.org/services/

Have you seen our videos? Check out our new YouTube training channel at: https://www.youtube.com/channel/UCGBoRD21EasDfJ6wELJI0vw

Email 2- Getting Started and Exports

Let's get started with the RescueGroups.org **Data Management** service!

With the **Data Management** service, you can greatly expand your ability to track data on the animals in your care. Just look at some of the many things you can do:

- Track adoptions and returns
- Track contacts and volunteers
- Track donations
- Track inventory
- Manage requests to meet animals
- Create animal journals to monitor medical and other information about animals

Getting Started

To get started, log in to your account:

Browse to https://rescuegroups.org and click the **Login** button at the top of the page. For more information, see the **Logging into your account** section of the Getting Started user guide.

If you are new to RescueGroups.org and haven't yet read our **Getting Started with RescueGroups.org** guide, we strongly urge you to do so.

The **Getting Started with Data Management** section of the **Data Management Service Guide** will help you to get started right away.

Have you seen our videos? Check out our new YouTube training channel at: https://www.youtube.com/channel/UCGBoRD21EasDfJ6wELJI0vw

And of course, you can always create a support ticket for assistance at any time.

Please remember that the **Data Management** service is a paid service. However, depending on your account status, you may have received a three-month free trial period. Thirty days before the end of the trial period, you'll receive our **Invoice** for continuing the service beyond the three months.

Email 3- More Information and Check-in

The RescueGroups.org **Data Management** service has been a part of your account for about a week, and we want to make sure that you're getting familiar with the service.

With the **Data Management** service, you can greatly expand your ability to track data on the animals in your care.   Using this service, you can:

- Track adoptions and returns
- Track contacts and volunteers
- Track donations
- Track inventory
- Manage requests to meet animals
- Create animal journals to monitor medical and other information about animals

We hope you received our last email with getting started tips. If you haven't, here's a quick summary:

1. Log into your account by Browsing to https://rescuegroups.org and click the **Login** button at the top of the page. For more information, see the **Logging into your account** section of the Getting Started user guide.
2. Click **Animals**.
3. Start tracking! Common things to track are **Adoptions**, **Journal Entries**, **Contact Journals**, and **Intakes**.   Remember, you can also **Add Animal**s and track animal information using the add and animal link.

It's that easy.

If you need help getting started, please check out our **Getting Started with Data Management** section of the **Data Management guide**.   And of course, you can always create a support ticket for assistance at any time. We've got your back!

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You can always upgrade your RescueGroups.org services by clicking the **Services** tab at the top of your account page, then selecting **Account Administration** and then **Upgrade Services**.

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Email 4- Tracking Adoptions and Check-in

It's been a month since your **Data Management** service with RescueGroups.org began. Are you tracking your animal adoptions, pulling reports, and setting reminders?

We hope you're familiar with all the ways you can manage the information for your animals, but remember, if you're having trouble, you can always create a support ticket for assistance at any time. The **Data Management Guide** will help you as well.

Tracking adoptions through the **Data Management** service gives you the ability to quickly monitor a lot of information.

An **Adoption** captures the following information for your records:

- The name of the adopted animal (required)
- The date of the adoption (required)
- The adopter/ new owner (required)
- A link to the adoption application
- The amount of the adoption fee
- Any additional donation made
- The status of a thank you letter (sent/not sent)
- The status of the adoption (success/returned)

Where do I add adoptions?

You can add an adoption from four places in your RescueGroups.org account:

- *Animals tab*: **Animals** > **Adoptions** > **Add an Adoption**
- *Home page*: **Home** > **Add a new** > **Adoption** > **Go**
- *Home page*: **Home** > **Quick Links** > **Add an adoption**
- *Management Interface Animal Page*: Select **Adoptions** from top menu on the animal's home page > **Add an Adoption for this Animal**

What can you do with all this data? First, let's pull a list of all your tracked adoptions:

Pulling a list of tracked adoptions

Go to **Animals** > **Journal Entries** > **Entry Types**. This page shows a list of all the types of journal entries you can record. If you scroll to the right, you see how many entries of each type are used. By clicking that number, you can look at the list of entries.. If you haven't yet done so, make sure you populate your account with the default entries by clicking the **Add Default Entry Types** button.

To pull a list of all adopted animals that you have tracked, find the journal entry description **Adoption** and then in the same row click the number under **Entries**. That's all there is to it! You can even use the search function (magnifying glass icon to the left) to search for individual Animals, Dates or Cost.

Now for another super idea. When you adopt an animal, you might want to follow up with the adopter in a week or two to see how the adoption is going. Wouldn't it be nice to get an email reminder to do that?

Reminders are in **Animal Journal Entries**.

Setting a reminder

- From the animal's page, click **Journal Entries** then click the **Add a Journal Entry for this Animal** button
- From **Animals** > **Journal Entries** click the **Add a Journal Entry** button

Once on the Add a Journal entry page

- Ensure the **Animal ID #1** is filled in (may need filled in depending on how it was added)
- Select **Entrytype ID #1** from the dropdown box (Example: Follow-Up, Medication)
- Select **Date #1**
- Add **Cost #1** if applicable
- Add any **Comment #1** you wish for clarity
- Add a **Due Date #1**
- Select the **Reminder Date #1**
- **Save**

The reminder is emailed to the person setting the reminder. Voila! You have been reminded.

Thank you for being a part of our team of shelters and rescue groups! To learn more about our other services for rescue groups and shelters, visit: https://www.rescuegroups.org/services/

You can always upgrade your RescueGroups.org services by clicking the **Services** tab at the top of your account page, then selecting **Account Administration** and then **Upgrade Services**.

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Email 5- 3-Month Trial Alert

Good morning!

This is an alert to let you know that your free three-month trial of the RescueGroups.org **Data Management** service will end in a month.   The **Data Management** service is a paid service, and you will be billed for the fourth month in a few days.

We hope you've enjoyed your free trial and that you choose to continue with the service. With the **Data Management** service, you can greatly expand your ability to track data on the animals in your care. Using this service, you can now:

- Track adoptions and returns
- Track contacts and volunteers
- Track donations
- Track inventory
- Manage requests to meet animals
- Create animal journals to monitor medical and other information about animals

If you haven't taken full advantage of the service, perhaps you'd like our help in getting started? Simply create a support ticket for assistance at any time, and a live person can help you with the process.

We believe the **Data Management** service is an important part of any rescue organization's daily business.   It makes your work easier, so if there is anything we can do to help you jump in and use your service, let us know.

Thank you for being a part of our team of shelters and rescue groups! To learn more about our other services for rescue groups and shelters, visit: https://www.rescuegroups.org/services/

You can always upgrade your RescueGroups.org services by clicking the **Services** tab at the top of your account page, then selecting **Account Administration** and then **Upgrade Services**.

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Popular Questions
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- setup

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