

How to email & bulk email through Rugby First.

Within the Rugby First system there is the functionality to email select members, roles or groups.

You can do this in one of two ways.

1. From the menu bar on the left of the screen, select **Membership** and **Membership list**

The screenshot shows the Rugby First website interface. At the top left is the RFU.com logo and a Club Search icon. At the top right, it says "Logged in as: Mr Max Burton [burton]" with a Logout button. Below the login info, it says "Page Last Updated: 25/08/2009" with icons for RSS, email, and print. A large photo of a rugby scrum is displayed. Below the photo, the text reads "Welcome to Invincibles" and "This a test site". On the left side, there is a navigation menu with the following items: Home, Club Details, Fixtures, Link To Rfu Com, Ipadio, Ballot, Club News, League, Forum, Search For Club, Become A Member ..., My Details, My Organisations, E-Learning, RugbyFirst Help And Support, Website Editor, Player Registration, Membership, Club Profile, Teams, Events. The Membership menu item is highlighted with a red box, and a sub-menu is open showing: Member List, Roles, Types, Export Member Data, Email Members, Email History, Merge Individuals, Pending Members, Club Handbook, Reports. The sub-menu item "Member List" is also highlighted with a red box.

Membership	Member List
Club Profile	Roles
Teams	Types
Events	Export Member Data
	Email Members
	Email History
	Merge Individuals
	Pending Members
	Club Handbook
	Reports

A new window will open, listing all current members of the club.

RFU.com
RFU.com
Join Us
Fixtures
Seniors
Women
Events

008

RFU.com
Club Search
Logged in as: Mr Max Burton [burton] [Logout](#)

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Membership List

[Click here to search for members](#)

List 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](#)

Type	Name	Renewal	Status	Phone/Email					<input type="checkbox"/>
tempU14	Christopher Ashmore ▶ Officer / Registrar / Adult ▶ Player / Not Registered / Adult (Men) ▶ Director of Rugby ▶ Team Officers / Doctor ▶ Webmaster / Full Webmaster	20/04/2010	Full	rugbyfirstsupport@therfu.com (0) 7843 678186		<input checked="" type="checkbox"/>			<input type="checkbox"/>
Enquiry	Max Burton ▶ Club Contact / Club Captain ▶ Officer / Marketing	17/07/2009	Full	MaxBurton@rfu.com (0) 20 1234567		<input checked="" type="checkbox"/>			<input type="checkbox"/>
Family	CAS Test User 1 CAS Test User 1 ▶ Webmaster / Full Webmaster	07/08/2010	Full			<input type="checkbox"/>			<input type="checkbox"/>
Enquiry	Paul Chorley ▶ Club Contact / League Contact ▶ Club Contact / International Ticket Contact ▶ Club Liason / Volunteer ▶ Coach ▶ Officer / Hon Treasurer ▶ Officer / Past President ▶ Officer / Registrar / Youth	21/05/2008	Full	paulchorley@rfu.com (0) 7702 274600		<input type="checkbox"/>			<input type="checkbox"/>
Enquiry	Paul Junior Chorley	28/02/2008	Full			<input type="checkbox"/>			<input type="checkbox"/>
Veterans	Paul Chorley Prtest	14/11/2008	Full			<input type="checkbox"/>			<input type="checkbox"/>
tempU14	Paul Chorley Test ▶ Player / Registered / Youth	19/12/2008	Full			<input type="checkbox"/>			<input type="checkbox"/>
Honorary	Test Email User - Do Not Delete	17/05/2008	Full	test@hotmail.co.uk 0111 123456		<input type="checkbox"/>			<input type="checkbox"/>
tempU14	Flick Hogben	10/02/2010	Full			<input type="checkbox"/>			<input type="checkbox"/>
MemberNew	Matthew Lord ▶ Webmaster / Full Webmaster	23/10/2008	Full			<input type="checkbox"/>			<input type="checkbox"/>
MemberNew	Robert Mackmurdie ▶ Officer / Registrar / Adult	17/01/2008	Full	robmackmurdie@rfu.com (0) 7887 792183		<input checked="" type="checkbox"/>			<input type="checkbox"/>
Enquiry	Burton Max ▶ Officer / Training	22/07/2009	Full			<input type="checkbox"/>			<input type="checkbox"/>
tempU14	Chris Test ▶ Officer / Chairman	08/07/2010	Full	ctashmore@ntlworld.com		<input type="checkbox"/>			<input type="checkbox"/>
Enquiry	Max Test ▶ Officer / Hon Secretary	27/07/2010	Full	MaxBurton@rfu.com 123456789		<input checked="" type="checkbox"/>			<input type="checkbox"/>

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Create New Member
Email Selected Users
Export Selected Users
Create Report

Choose Constituent Body

Please note: Changing the Constituent Body will clear the member selection.

To join selected members to the selected cb, please select Membership Type & Status.

Enquiry

From the membership page you can select the individuals you wish to email by ticking the boxes next to their account and select **email selected members**. From here a new page will open where you can begin to input the wording for your email. (Illustrated later on in the guide)

2. Alternatively you can choose to bulk email specific groups or individuals.

Select **Membership** from the menu bar on the left of the screen and **Email Members**.

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Club Details
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Link To Rfu Com
Ipadio
Ballot
Club News
League
Forum
Search For Club
Become A Member ...
My Details
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Page Last Updated: 25/08/2009



Welcome to Invincibles

This a test site

E-Learning	
RugbyFirst Help And Support	
Website Editor	
Player Registration	
Membership	Member List
Club Profile	Roles
Teams	Types
Events	Export Member Data
	Email Members
	Email History
	Merge Individuals
	Pending Members
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	Reports

A new window will open displaying a search facility that allows you to search for specific members of your clubs. You can search for specific membership types, roles or awards. You can also search across all three functions. E.g. all full members that are players and have a coaching qualification.

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Email Members - Select Recipients

Members

Roles

Awards

Membership Search

Search Text	<input type="text"/>	Member Status	<input checked="" type="checkbox"/> Full <input type="checkbox"/> Lapsed <input checked="" type="checkbox"/> Enquiry
Membership Type	*Any Membership Type	Gender	*Any Gender
Award		Payment Method	*Any Payment Method
DOB	From: <input type="text"/>	Membership Number	To: <input type="text"/>
DOB	<input type="text"/>		
BirthDay	<input type="text"/>		
Join Date	<input type="text"/>		
Enquiry Date	<input type="text"/>		
Renewal Date	<input type="text"/>		

[Clear All Search Details](#) [Clear Membership Search Details](#)

Search

For the purposes of this guide we want to email all players & coaches within the club.

Select **Roles** from the tab menu at the top of the search page. A new search will open.

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Email Members - Select Recipients

Members

Roles

Awards

Role Search

	Role	Category	Sub-Category	
Find people with role ...	*Any Role			<input checked="" type="checkbox"/> Cascade All
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade

[Clear All Search Details](#) [Clear Roles Search Details](#)

Search

From this page you can now begin to build up your search.

Select the first box **"Role"** and a drop down box displaying all the roles within the club will appear.

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Email Members - Select Recipients

Members
Roles
Awards

Role Search

	Role	Category	Sub-Category	
Find people with role ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Advisor Development Officer			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	CB Super User			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Club Contact			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Club Liason			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Club Referee Developer			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Coach			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Committee			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Competition Roles			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	CRB Check			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Director of Rugby			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Higher Education			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Officer			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Player			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Referee			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Referee Appointments			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Referee Re-Appointments			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Regional Rugby Development			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Rugby Development Officer			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	RWC Recruitment Team			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	School			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Section Officers			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Team Officers			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Training Officer			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	vRugby			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	Webmaster			<input checked="" type="checkbox"/> Cascade

Clear All Search Details
Clear Roles Search Details

As we are looking for players select **"Players"** from the drop down box. Once select the **"Category"** menu next to it will become active.

Select the category menu and a drop down box will illustrate all the various player types you have within that club. You can choose to select the players you wish to search for. In our case we want to contact all players, so select **"Any Role Category"**

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Email Members - Select Recipients

Members
* Roles
Awards

Role Search

	Role	Category	Sub-Category	
Find people with role ...	Player	Any Role Category		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Any Role Category		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Not Registered		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Play On		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Registered		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade

Clear All Search Details
Clear Roles Search Details

Once again, when you have selected the category you wish to search for the next menu in line will become active the **"Sub Category"**

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Email Members - Select Recipients

Members					* Roles					Awards								
Role Search																		
	Role	Category	Sub-Category	<input checked="" type="checkbox"/>	Cascade		Role	Category	Sub-Category	<input checked="" type="checkbox"/>	Cascade		Role	Category	Sub-Category	<input checked="" type="checkbox"/>	Cascade	
Find people with role ...	Player	Any Role Category	Any Role Sub-Category	<input checked="" type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input type="checkbox"/> and also find ...	*Any Role			<input type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input type="checkbox"/> and also find ...	*Any Role			<input type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input type="checkbox"/> and also find ...	*Any Role			<input type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input type="checkbox"/> and also find ...	*Any Role			<input type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							

Search

Due to our previous selection, the options are limited in the sub category, therefore select **Any Role Sub Category** will be selected.

The first filters for our search have now been completed.

We now need to build the second part of our search, as we are also looking for coaches.

To do this you need to select the **"and also find"** tick box.

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Email Members - Select Recipients

Members					* Roles					Awards								
Role Search																		
	Role	Category	Sub-Category	<input checked="" type="checkbox"/>	Cascade		Role	Category	Sub-Category	<input checked="" type="checkbox"/>	Cascade		Role	Category	Sub-Category	<input checked="" type="checkbox"/>	Cascade	
Find people with role ...	Player	Any Role Category	Any Role Sub-Category	<input checked="" type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input checked="" type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input type="checkbox"/> and also find ...	*Any Role			<input type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input type="checkbox"/> and also find ...	*Any Role			<input type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							
<input type="checkbox"/> and also find ...	*Any Role			<input type="checkbox"/>	Cascade					<input checked="" type="checkbox"/>	Cascade							

Search

Once the icon has been selected you can now begin the second part of the search.

As before, select the role you wish to search for – Coach.

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Email Members - Select Recipients

Members
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Role Search

	Role	Category	Sub-Category	
Find people with role ...	Player	Any Role Category	Any Role Sub-Category	<input checked="" type="checkbox"/> Cascade All
<input checked="" type="checkbox"/> and also find ...	Coach	Any Role Category		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade

[Clear All Search Details](#) [Clear Roles Search Details](#)

The category filter will now be active. You can choose to search via specific coaching roles – Junior, Mini-Midi or Senior. In our case we are searching for All Coaches.

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Email Members - Select Recipients

Members
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Role Search

	Role	Category	Sub-Category	
Find people with role ...	Player	Any Role Category	Any Role Sub-Category	<input checked="" type="checkbox"/> Cascade All
<input checked="" type="checkbox"/> and also find ...	Coach	Any Role Category		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Any Role Category		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Junior		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Mini-Midi		<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role	Senior		<input checked="" type="checkbox"/> Cascade

[Clear All Search Details](#) [Clear Roles Search Details](#)

Once selected the Sub Category menu will now be active. Again dependant on the search you stipulated on the category menu. The sub category will open and provide you with a number of options. In this case **Any Role Sub Category**. Should you choose Junior coaches in the Category menu. The sub category will ask you if you would like to search for Colts Coaches, under 10's etc, etc. In this instance we require all coaches.

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Email Members - Select Recipients

Role Search				
	Role	Category	Sub-Category	
Find people with role ...	Player	Any Role Category	Any Role Sub-Category	<input checked="" type="checkbox"/> Cascade All
<input checked="" type="checkbox"/> and also find ...	Coach	Junior	Any Role Sub-Category	<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade
<input type="checkbox"/> and also find ...	*Any Role			<input checked="" type="checkbox"/> Cascade

[Clear All Search Details](#) [Clear Roles Search Details](#)

Search

The search is now complete. In order to find the specific individuals you have outlined above. Select search.

Rather than bringing up a list of the individuals you have specified to search for. An email page will appear, the individuals you wish to email have been found and their email addresses have been extracted for their member pages and an email has been created.

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E-Mail Members - Create Message

Create Email	
From:	MaxBurton@rfu.com <input type="checkbox"/> Include Signature
Sending to:	View Email Recipients [4 member(s).] View Recipients with no Email Address [4 member(s).]
CC:	
Subject:	<input style="width: 100%;" type="text"/>
Message Body:	<div style="border: 1px solid red; padding: 5px;"> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> Font (Arial) Size </div> <div style="height: 150px; border: 1px solid gray;"></div> </div>
Attach File:	<input type="text"/> <input type="button" value="Browse..."/>
Attach File:	<input type="text"/> <input type="button" value="Browse..."/>
Attach File:	<input type="text"/> <input type="button" value="Browse..."/>
<input type="button" value="Send Emails"/>	

You can now start inputting the text and the subject heading you wish to send to the recipients. You can choose to view the recipients that will be receiving the email by selecting the **“view email recipients”** (see below) you can also view those that don't

have an email address and will not receive the email when it is sent. (as highlighted above)

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E-Mail Members - Create Message

Create Email

From: MaxBurton@rfu.com Include Signature

Sending to: [View Email Recipients \[4 member\(s\) \]](#) [View Recipients with no Email Address \[4 member\(s\) \]](#)

MemberPrintResults - Windows Internet Explorer

http://clubs.rfu.com/Membership/MemberPrintResults.aspx?Mode=Email

Name	Email Address
Christopher Ashmore	rugbyfirstsupport@therfu.com
Paul Chorley	paulchorley@rfu.com
Paul Chorley	paulchorley@rfu.com
Max Test 2	MaxBurton@rfu.com

Done Internet 100%

A new window will appear allowing you to view the individuals that you will be sending the email to.

When writing the email you have a number of options available to you. You can choose to input pictures, input tables etc. If you hover the mouse cursor over the icons a description of the function available to you will appear.

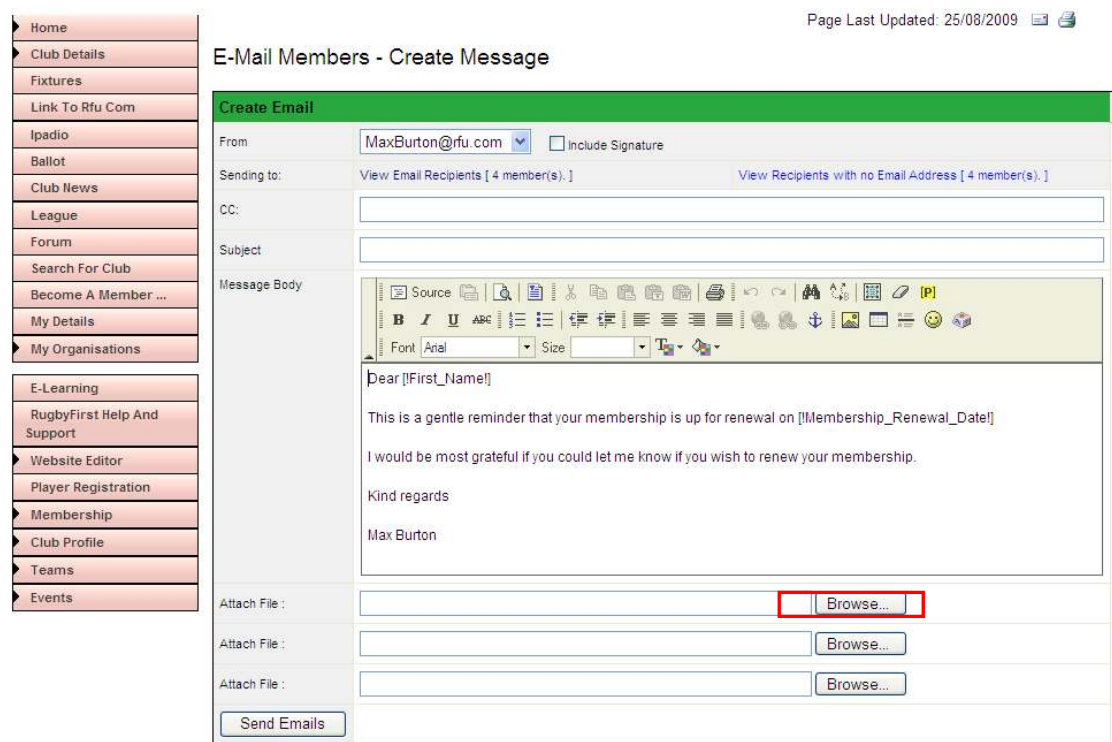
One of the most useful functions is insert data field option. [P]

If you select this icon above, a pop up screen will appear asking you to stipulate what information you would like to merge into the email. E.g if you select the first name field. This will tell the system to import all the first names of the individuals you are sending the email to. The recipient will only see their name, not everybody else that has received the email.

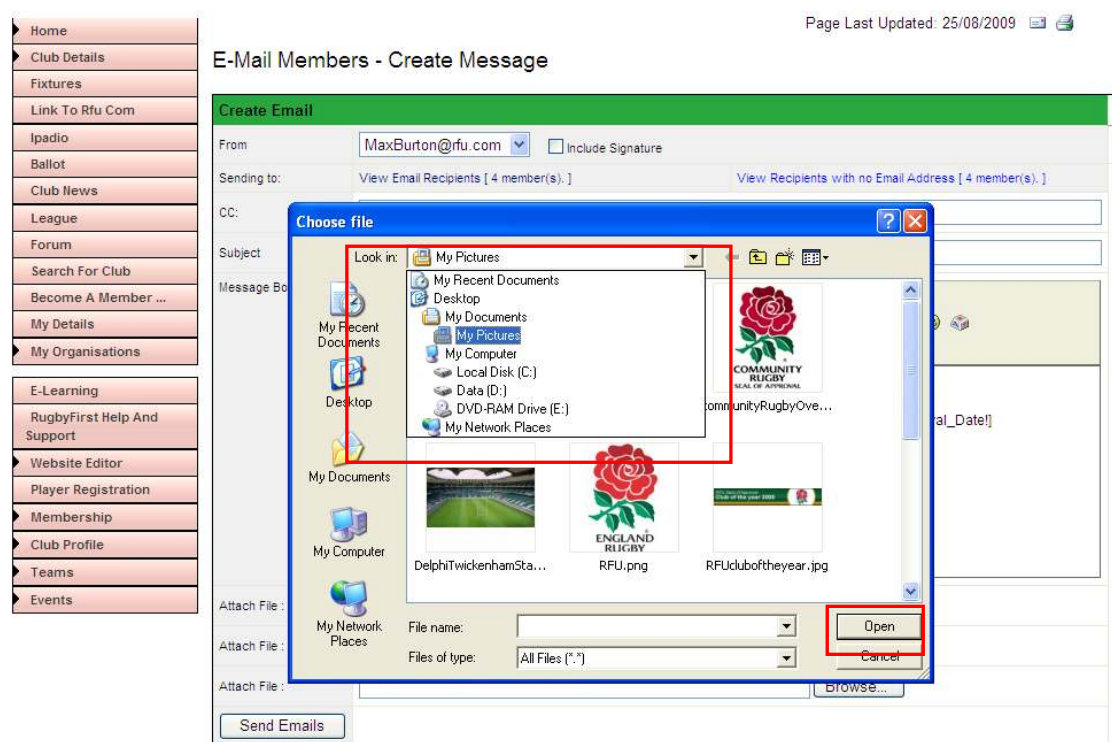
The screenshot shows a web application interface for creating an email message. On the left is a sidebar with navigation options: Home, Club Details, Fixtures, Link To Rfu Com, Ipadio, Ballot, Club News, League, Forum, Search For Club, Become A Member..., My Details, My Organisations, E-Learning, RugbyFirst Help And Support, Website Editor, Player Registration, Membership, Club Profile, Teams, and Events. The main content area is titled 'E-Mail Members - Create Message' and contains a 'Create Email' form with fields for From, Sending to, CC, Subject, and Message Body. A 'Data Field Dialog' window is open over the Message Body field, listing various data fields to insert: First_Name, Last_Name, Date_Of_Birth, Email_Address, Phone_Number, Phone_Type, House_Name, House_Number, Address1, Address2, Address3, City, County, PostCode, Country, Organisation_Name, Membership_Number, Membership_Type, Membership_Status, Membership_Renewal_Date, Membership_Payment_Method, Membership_ApplicationDate, DisplayEmail, and Email_Name. The dialog has 'OK' and 'Cancel' buttons. The background form also has 'Send Emails' and 'Attach File' buttons. The top right corner shows 'Page Last Updated: 25/08/2009' and a toolbar with icons, including a yellow 'P' icon.

Select First Name and select ok.



As you can see below, an email has been composed. The email will also be extracting individuals membership renewal dates from the data field options. The system will extract the membership renewal date from their individual account and input the date that their membership is up for renewal into the email.



You can also choose to attach certain documents to the email. You may wish to include a flyer for an event, a certificate. If you wish to attach a document select browse.



A new window will open asking you to search for the document you wish to attach. Select the file you wish to “look in” select the file you wish to attach and select open

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E-Mail Members - Create Message

Create Email

From: MaxBurton@rfu.com Include Signature

Sending to: View Email Recipients [4 member(s).] [View Recipients with no Email Address \[4 member\(s\). \]](#)

CC:

Subject:

Message Body

Dear [!First_Name!]

This is a gentle reminder that your membership is up for renewal on [!Membership_Renewal_Date!]

I would be most grateful if you could let me know if you wish to renew your membership.

Kind regards

Max Burton

Attach File: D:\My Documents\My Pictures\communityRugbyOver.bmp



Attach File:

Attach File:

You will be able to see that the file is now embedded into the email and will be sent as an attachment within the email.

Once you are happy with the content of the email select Send Emails.

A window will open informing you that your emails have been sent successfully.

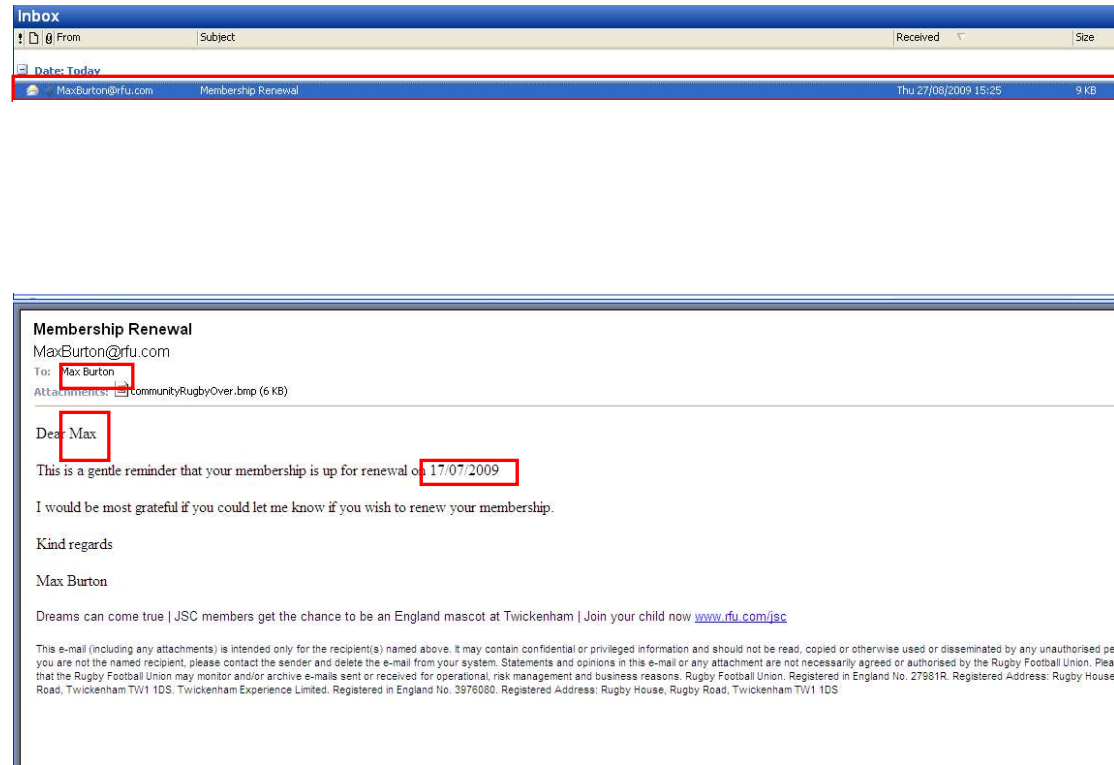
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E-Mail Members - Message Sent

Your email has been sent to the selected recipients.

The view from the recipients email account that receives the email is outlined below


This example is in Outlook



As you can see, regardless of the fact that the email was sent to multiple individuals, only the recipients email is visible, the other recipients email addresses or names cannot be seen. The name of individual has been merged from the account through the data field option, as has the date of their membership renewal.

You can also view and check that the emails have been sent successfully via the email history page on the membership tab of the menu bar.

Page Last Updated: 25/08/2009



Welcome to Invincibles
This a test site

- Home
- Club Details
- Fixtures
- Link To Rfu Com
- Ipadio
- Ballot
- Club News
- League
- Forum
- Search For Club
- Become A Member ...
- My Details
- My Organisations

- E-Learning
- RugbyFirst Help And Support
- Website Editor
- Player Registration
- Membership
 - Member List
 - Roles
 - Types
 - Export Member Data
 - Email Members
 - Email History**
 - Merge Individuals
 - Pending Members
 - Club Handbook
 - Reports
- Club Profile
- Teams
- Events

The email history page will display all the emails that you have sent via Rugby First.

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Sent		Received			
View	From	Subject	Sent	Attachment(s)?	Club Sent From
	Mr Max Burton	Membership Renewal	27/08/2009 15:24:10	True	Invincibles RFC

Filter By Rows per page 10

<< < 1 > >>

Select view and the email that you recently sent will become visible at the bottom of the page, together with all the recipients listed and when the email was sent.

Sent		Received			
	From	Subject	Sent	Attachment(s)?	Club Sent From
<input type="button" value="View"/>	Mr Max Burton	Membership Renewal	27/08/2009 15:24:10	True	Invincibles RFC
Filter By		<input type="text"/>	Rows per page	10	<< < 1 > >>

Sent	27/08/2009 15:24:10
From	Mr Max Burton[MaxBurton@rfu.com]
To	Mr Max Burton[MaxBurton@rfu.com]
Subject	Membership Renewal
Message Body	<p>Dear [First_Name]</p> <p>This is a gentle reminder that your membership is up for renewal on [[Membership_Renewal_Date]]</p> <p>I would be most grateful if you could let me know if you wish to renew your membership.</p> <p>Kind regards</p> <p>Max Burton</p>