

How to email & bulk email through Rugby First.

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

For constituent bodies they have the facility to email groups across all the clubs that fall into your CB.

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**

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

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Email Members
Email History
Merge Individuals
Pending Members
Club Handbook
Reports

Welcome to Invincibles
This a test site

rst friendly of the new season.
ad
Whole Club Seal of Approval

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

RFU.com
Join Us Fixtures Seniors Women Events

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		CRB			
tempU14	Christopher Ashmore <ul style="list-style-type: none"> ▶ 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 type="checkbox"/>
Enquiry	Max Burton <ul style="list-style-type: none"> ▶ Club Contact / Club Captain ▶ Officer / Marketing 	17/07/2009	Full	MaxBurton@rfu.com (0) 20 1234567					<input type="checkbox"/>
Family	CAS Test User 1 CAS Test User 1 <ul style="list-style-type: none"> ▶ Webmaster / Full Webmaster 	07/08/2010	Full						<input type="checkbox"/>
Enquiry	Paul Chorley <ul style="list-style-type: none"> ▶ 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"/>

Enquiry	Paul Junior Chorley	28/02/2008	Full					<input type="checkbox"/>
Veterans	Paul Chorley Prtest	14/11/2008	Full					<input type="checkbox"/>
tempU14	Paul Chorley Test ▶ Player / Registered / Youth	19/12/2008	Full					<input type="checkbox"/>
Honorary	Test Email User - Do Not Delete	17/05/2008	Full	test@hotmail.co.uk 0111 123456				<input type="checkbox"/>
tempU14	Flick Hogben	10/02/2010	Full					<input type="checkbox"/>
MemberNew	Matthew Lord ▶ Webmaster / Full Webmaster	23/10/2008	Full					<input type="checkbox"/>
MemberNew	Robert Mackmurdie ▶ Officer / Registrar / Adult	17/01/2008	Full	robmackmurdie@rfu.com (0) 7887 792163				<input type="checkbox"/>
Enquiry	Burton Max ▶ Officer / Training	22/07/2009	Full					<input type="checkbox"/>
tempU14	Chris Test ▶ Officer / Chairman	08/07/2010	Full	ctashmore@ntlworld.com				<input type="checkbox"/>
Enquiry	Max Test ▶ Officer / Hon Secretary	27/07/2010	Full	MaxBurton@rfu.com 123456789				<input type="checkbox"/>

Page Size: 20 Viewing Page: 1 (Ashmo - Test) of 2 Viewing 1 - 20 of 24

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.

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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- Events

Welcome to Invincibles

This a test site

Membership	Member List	
Club Profile	Roles	
Teams	Types	
Events	Export Member Data	
	Email Members	rst frie dly of the new season.
	Email History	ad
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A new window will open displaying a search facility that allows you to search for specific members, roles or awards across all clubs that sit within your CB. You can search for specific membership types, roles, awards and clubs. You can also search across all four tabs. E.g. all Hon Secretaires at clubs.

For the purposes of this exercise we want to email all Hon Secretaries at the various clubs within the CB.

Email Members - Select Recipients

Members Roles Awards Constituents

Membership Search

Search Text Member Status Full Lapsed Enquiry

Membership Type *Any Membership Type Gender *Any Gender

Award Payment Method *Any Payment Method

Membership Number

From To

DOB

dd/mm/yyyy dd/mm/yyyy

Birthdate

dd/mm/yyyy dd/mm/yyyy

Join Date

dd/mm/yyyy dd/mm/yyyy

Enquiry Date

dd/mm/yyyy dd/mm/yyyy

Renewal Date

dd/mm/yyyy dd/mm/yyyy

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

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

Email Members - Select Recipients

Members *** Roles** Awards Constituents

Role Search

Role Category Sub-Category Cascade All

Find people with role ... *Any Role Any Role Category Any Role Sub-Category Cascade

and also find ... *Any Role Cascade

and also find ... *Any Role Cascade

and also find ... *Any Role Cascade

and also find ... *Any Role Cascade

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

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.

The screenshot shows the 'Email Members - Select Recipients' interface. At the top, there are tabs for 'Members', '* Roles', 'Awards', and 'Constituents'. Below these is the 'Role Search' section. It features a table with columns for 'Role', 'Category', and 'Sub-Category'. The 'Role' column has a dropdown menu open, showing a list of roles. The 'Category' and 'Sub-Category' columns have dropdown menus. There are also checkboxes for 'Cascade' and 'All' in each row. A 'Search' button is located at the bottom left of the search area.

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

As we are looking for all Hon Secretaries, select **“Officer”** from the drop down box. Once selected the **“Category”** menu next to it will become active.

Select the category menu and a drop down box will illustrate all the various officer roles available.. For the purposes of this exercise select “**Hon Secretary**”.

Email Members - Select Recipients

Members * Roles Awards Constituents

Role Search

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

Search

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**”

Email Members - Select Recipients

Members * Roles Awards Constituents

Role Search

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

Search

Clear All Search Details Clear Roles Search Details

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, finding the clubs

Select the “**Constituents**” tab

All clubs that fall within that given CB will be listed. As we are looking for a contact at all clubs. Select, **Select All**. This will add a tick against all the clubs.

You could narrow the search by individually selecting the clubs you wanted to search.

Email Members - Select Recipients

Members * Roles Awards **Constituents**

Constituent Search

Search in parent organisation

Search in the following constituent organisations Search by Club Name

<input checked="" type="checkbox"/> Select All	Organisation Name
<input type="checkbox"/>	Barton-Under-Needwood RFC
<input type="checkbox"/>	Bloxwich RFC
<input type="checkbox"/>	Brinsford RFC
<input type="checkbox"/>	Burntwood RUFC
<input type="checkbox"/>	Burton RFC Ltd
<input type="checkbox"/>	Cannock RUFC
<input type="checkbox"/>	Eccleshall RUFC
<input type="checkbox"/>	Essington RUFC
<input type="checkbox"/>	Featherstone RFC
<input type="checkbox"/>	Handsworth RUFC
<input type="checkbox"/>	Hanford RFC

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

Once the Select All icon has been selected you, select **Search**.

The search is now complete.

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

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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

Attach File:

Attach File:

Attach File:

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

File Edit View Favorites Tools Help McAfee SiteAdvisor

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 box with the letter 'P'.

Select First Name and select ok.

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E-Mail Members - Create Message

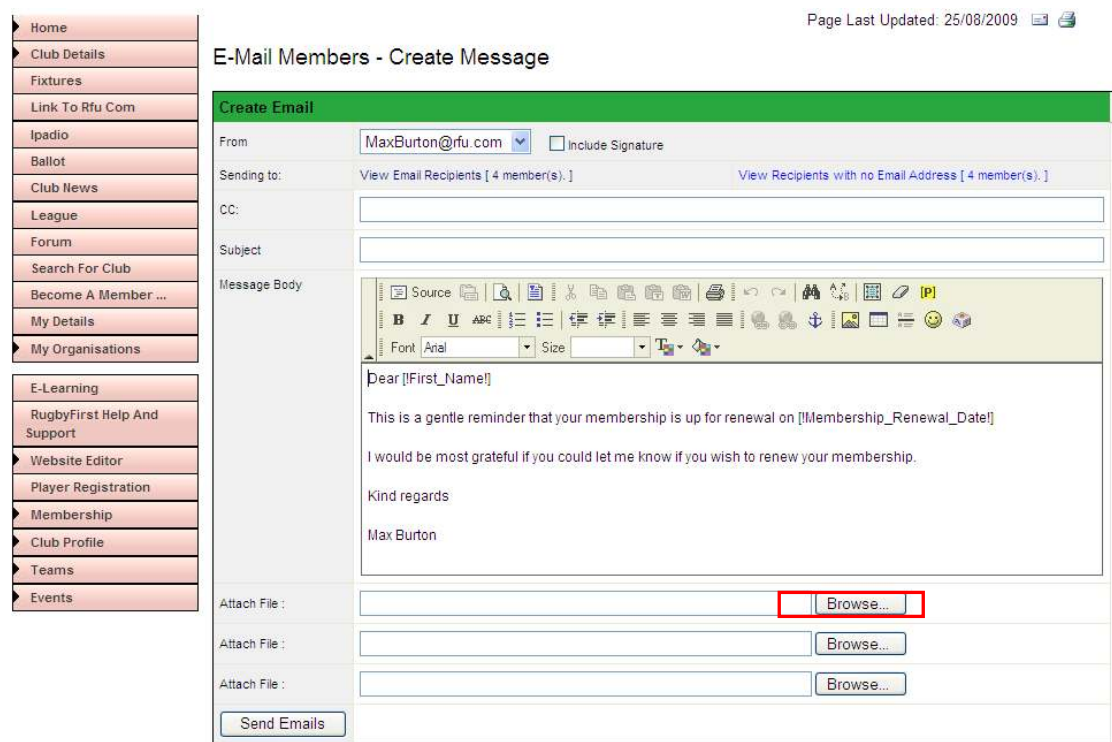
Create Email

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:	<input type="text"/>
Subject:	<input type="text"/>
Message Body:	<div style="border: 1px solid gray; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;"> </div> <div style="padding: 5px;"> Font: Arial Size: <input type="text"/> </div> <div style="border: 1px solid gray; height: 150px; padding: 5px;"> {!!First_Name!!} </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"/>	

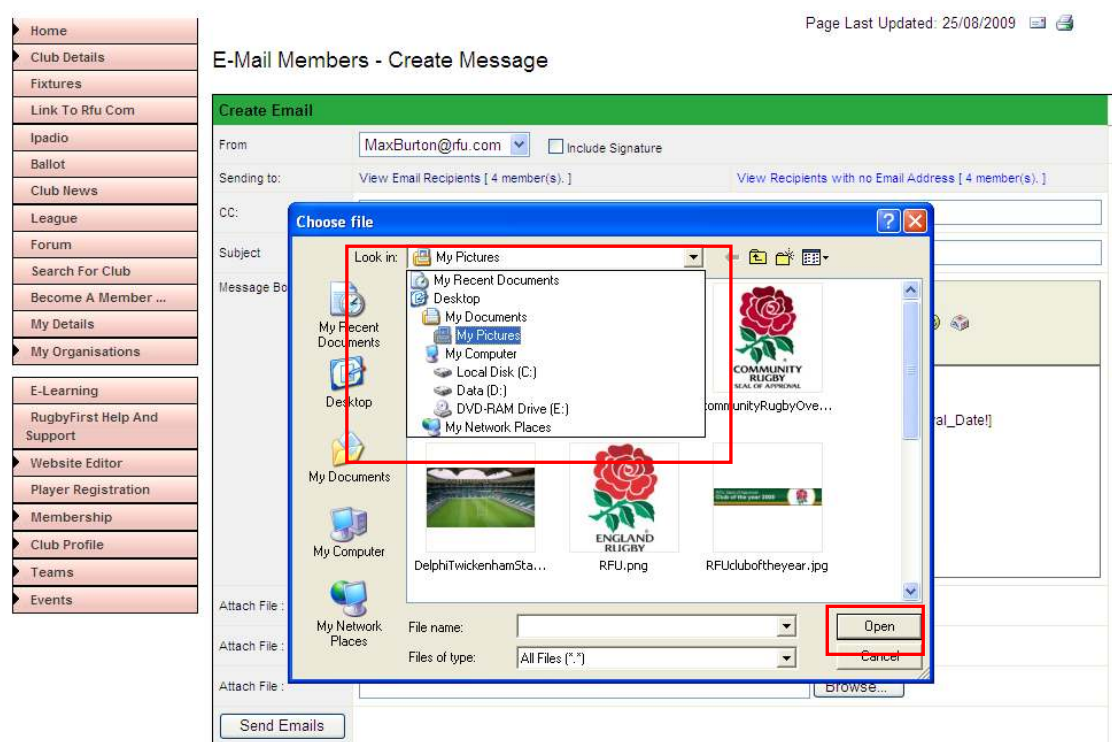
First name will appear in the email. This will now import everybody's name that is receiving the email, meaning you don't have to populate every single email or alternatively input Dear All. The email is personalised with each recipients name.

You can now begin to input the text of the email. You may wish to choose other data fields to merge. For example if you wish to let individuals know when their membership is due to renewal.



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:

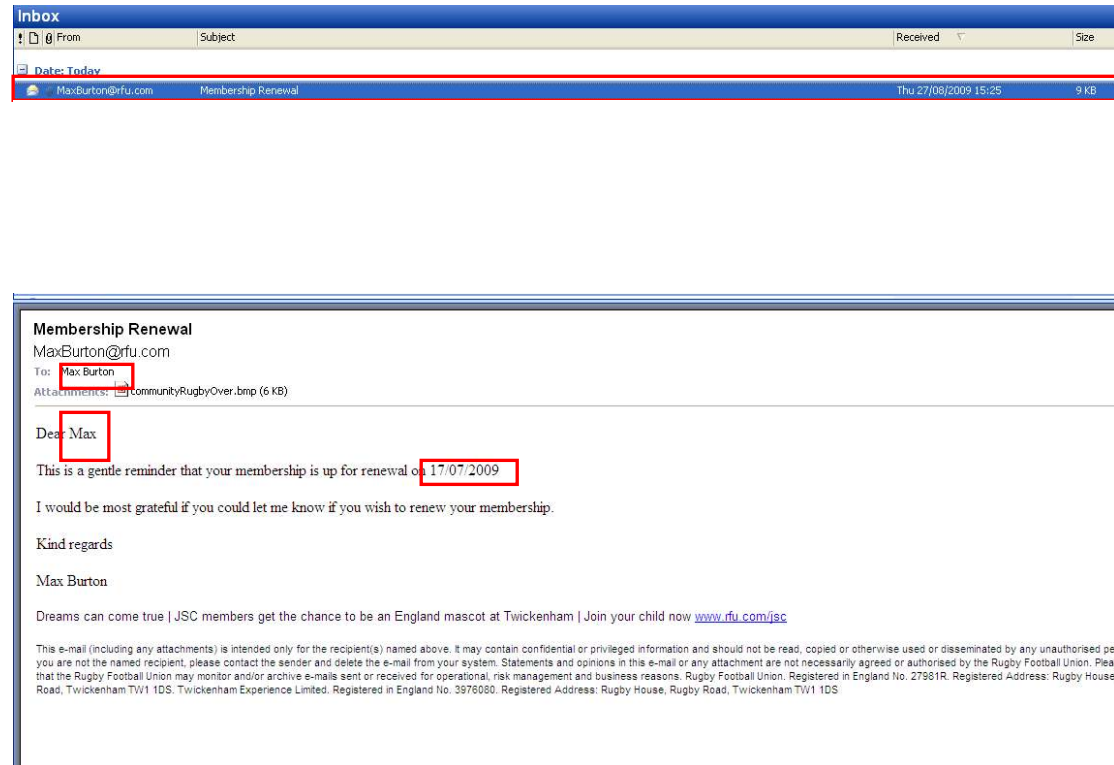
Subject:

Message Body

Source                                                 




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.

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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
<input type="checkbox"/>	Mr Max Burton	Membership Renewal	27/08/2009 15:24:10	True	Invincibles RFC

Filter By Rows per page 10

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>