



**BLUE SOMBRERO**



# AYSO Regional Management System (RMS) – Bulk Email Feature

Section 2 & 9 – Northwest Expo  
February 22<sup>nd</sup> – 24<sup>th</sup> 2019  
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# Why is bulk email important?

- Maintaining contact with parents and volunteers is a vital part of building or maintaining participation levels in your region/area.
- Notifying your website users of any changes, updates, or important announcements avoids repeated questions to staff.
- The RMS bulk email tool can be used at a regional, area, or section level to launch ad campaigns, events, registrations, or regular newsletters.

# What are the benefits of using the RMS email?

- Present parents, volunteers, and site users with a professional looking method of communication.
- Use similar messaging across various platforms to re-inforce your message and brand identity.

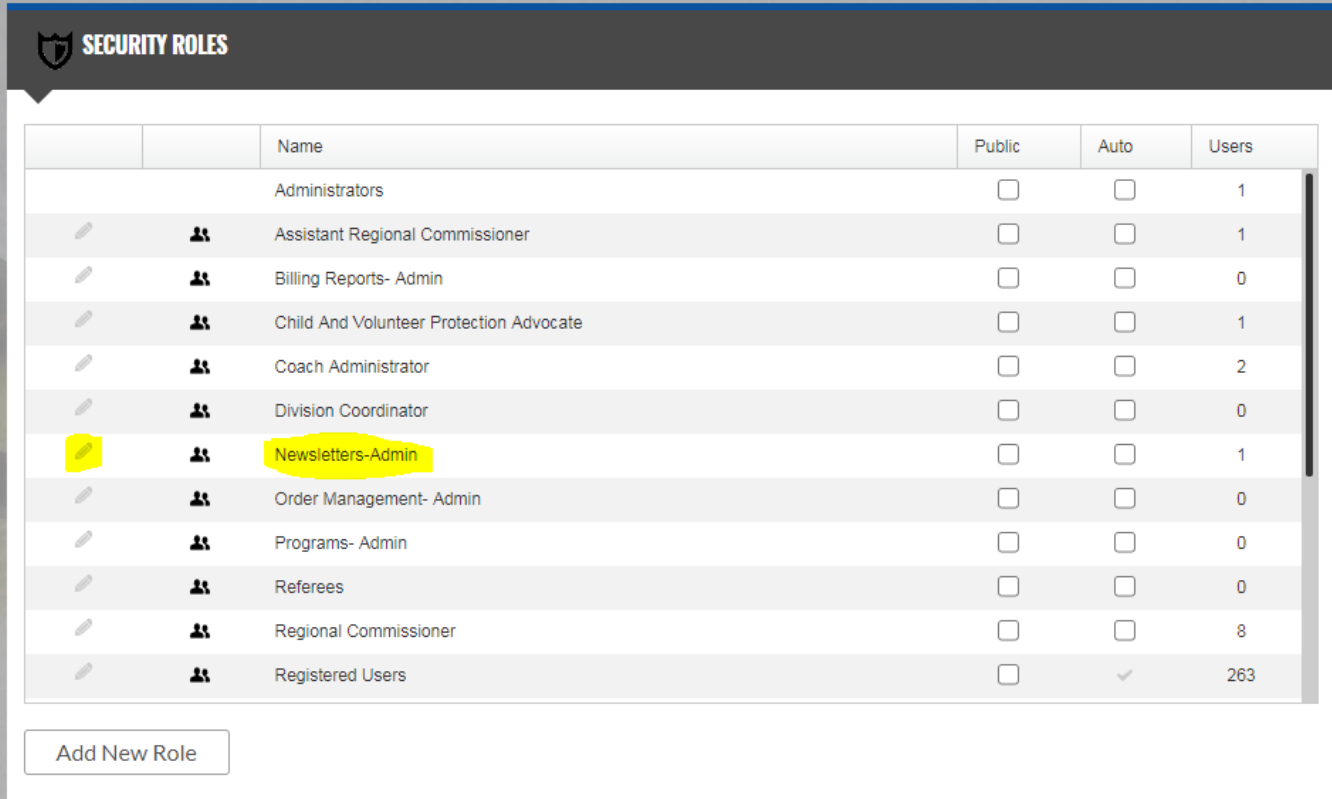
























# Steps to Set Up RMS Bulk Email

- Assign the correct roles to volunteers who will be using Bulk Email
- Create and save email distribution lists
  - Board members, age divisions, referees, parents, etc.
- Create and save templates
  - Announcements, newsletters, events, etc.
- Start emailing!

# Assign Roles for Bulk Email Access

The role needed to access the bulk email feature is “Newsletter Admin”. Other roles such as “Regional Commissioner” and “Assistant Regional Commissioner” already have access.

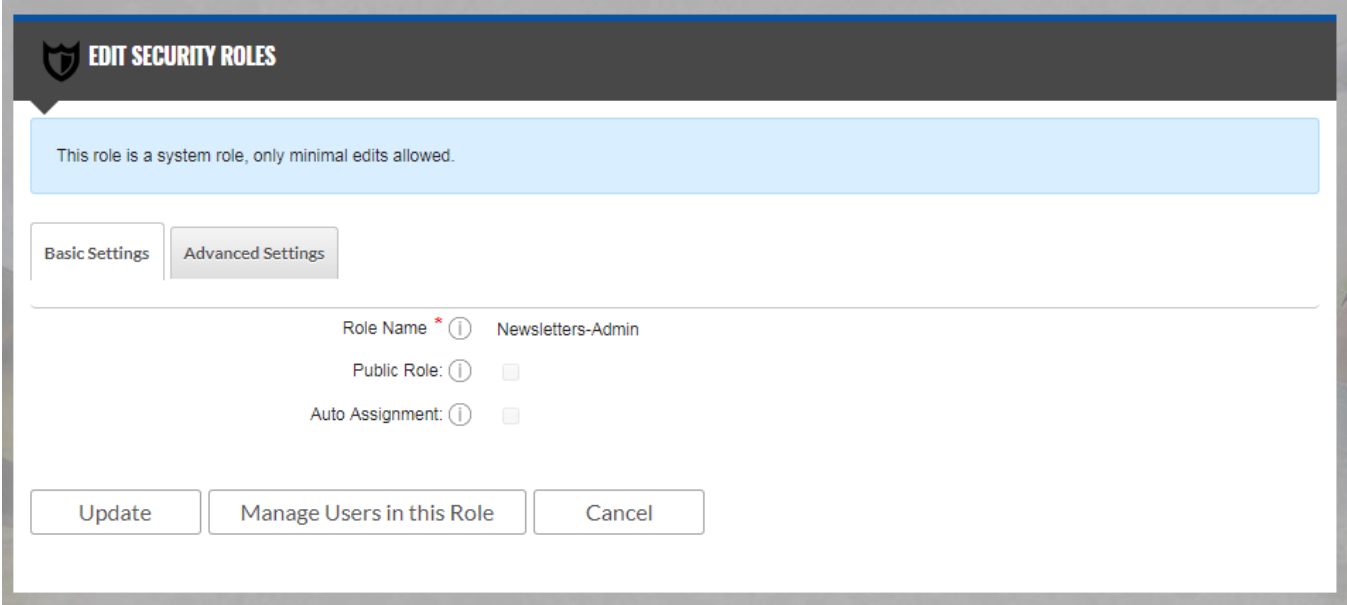


|  | Name  | Public                   | Auto                                | Users |
|--|---|--------------------------|-------------------------------------|-------|
|  | Administrators  | <input type="checkbox"/> | <input type="checkbox"/>            | 1     |
|    |  Assistant Regional Commissioner         | <input type="checkbox"/> | <input type="checkbox"/>            | 1     |
|    |  Billing Reports- Admin                  | <input type="checkbox"/> | <input type="checkbox"/>            | 0     |
|    |  Child And Volunteer Protection Advocate | <input type="checkbox"/> | <input type="checkbox"/>            | 1     |
|    |  Coach Administrator                     | <input type="checkbox"/> | <input type="checkbox"/>            | 2     |
|    |  Division Coordinator                    | <input type="checkbox"/> | <input type="checkbox"/>            | 0     |
|    |  Newsletters-Admin                       | <input type="checkbox"/> | <input type="checkbox"/>            | 1     |
|    |  Order Management- Admin                 | <input type="checkbox"/> | <input type="checkbox"/>            | 0     |
|    |  Programs- Admin                         | <input type="checkbox"/> | <input type="checkbox"/>            | 0     |
|    |  Referees                                | <input type="checkbox"/> | <input type="checkbox"/>            | 0     |
|    |  Regional Commissioner                   | <input type="checkbox"/> | <input type="checkbox"/>            | 8     |
|  |  Registered Users                      | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 263   |

[Add New Role](#)

# Assign Roles for Bulk Email Access

Add any users that should have access to the bulk email feature by selecting “Manage Users in this Role”



The screenshot displays the 'EDIT SECURITY ROLES' interface. At the top, a dark header contains a shield icon and the text 'EDIT SECURITY ROLES'. Below this, a light blue box contains the message: 'This role is a system role, only minimal edits allowed.' Underneath, there are two tabs: 'Basic Settings' (active) and 'Advanced Settings'. The main content area shows the following fields:

- Role Name \* ⓘ Newsletters-Admin
- Public Role: ⓘ
- Auto Assignment: ⓘ

At the bottom, there are three buttons: 'Update', 'Manage Users in this Role', and 'Cancel'.

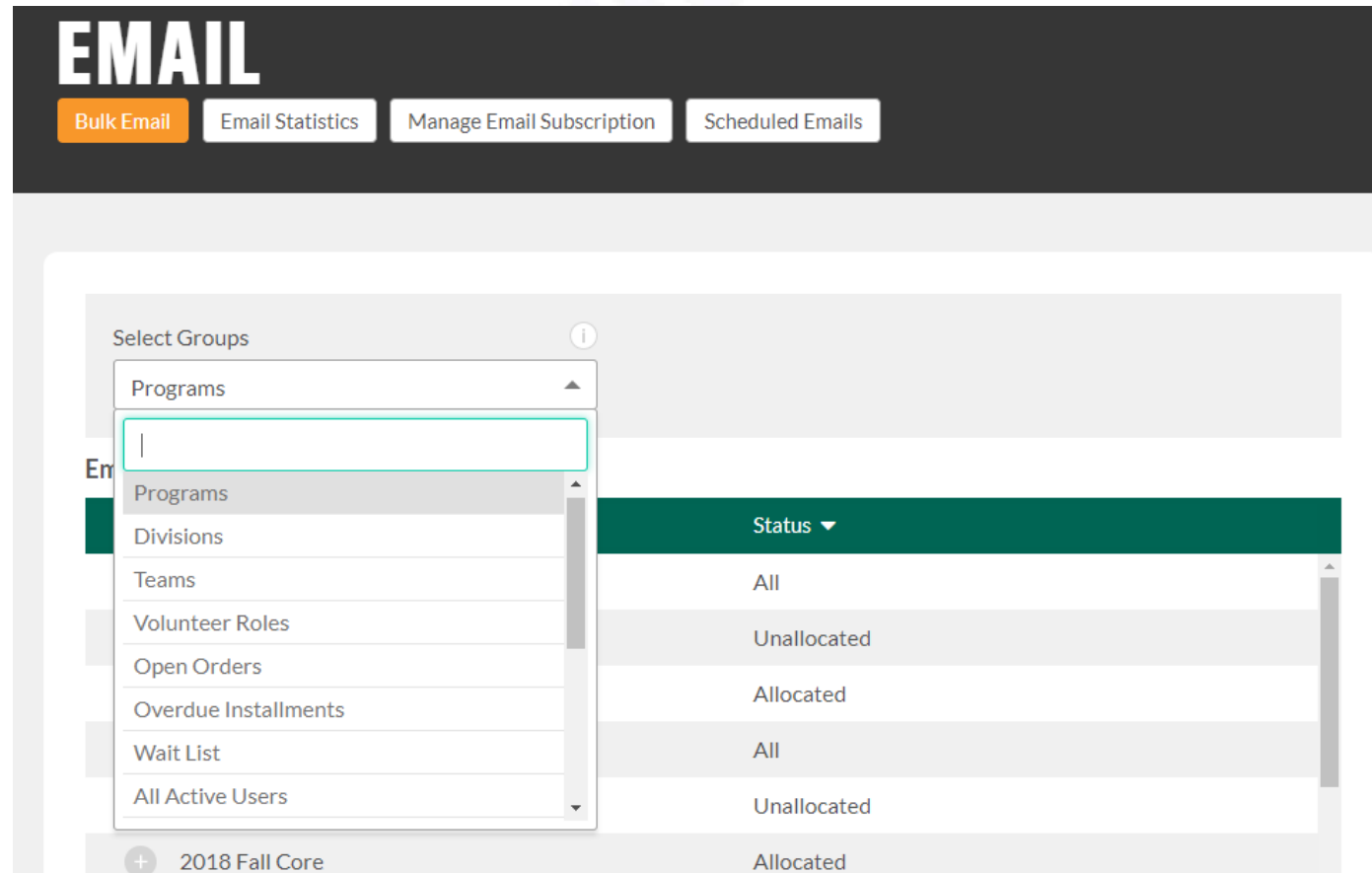
# Assign Roles for Bulk Email Access

Select the users from the dropdown and then enter effective and expiry dates before adding the user to the role.

The screenshot shows a web interface titled "USER ROLES" with a sub-header "Manage Users in Role: Newsletters-Admin". Below this, there are three input fields: "User Name", "Effective Date", and "Expiry Date". The "User Name" field has a dropdown menu open, listing several users: Agan, Codi (ca.agan), Alcartado, Cheznyie (Cheznyie), Becerra, Jessica (Wgsweetgirl), Betorina-Sharp, Kayla (kaylabelorina), Bettencourt, Amy (amybettencourt@yahoo.com), Betz, David (Laythen23), and Bidou, Sommer (Somdawn1). To the right of the date fields is an "Add User to Role" button. Below the input fields, there is a table with columns for "Effective Date" and "Expiry Date". At the bottom right of the table area, there are navigation links: "First", "Previous", "Next", and "Last".

# Create and Save Custom Distribution Lists

Once in the email feature, select groups from the dropdown menu. There are many different ways to filter users and volunteers, experiment and find what works best for you.



The screenshot shows the 'EMAIL' management interface. At the top, there are four buttons: 'Bulk Email' (highlighted in orange), 'Email Statistics', 'Manage Email Subscription', and 'Scheduled Emails'. Below this is a 'Select Groups' dropdown menu with a search bar and a list of options: Programs, Divisions, Teams, Volunteer Roles, Open Orders, Overdue Installments, Wait List, and All Active Users. To the right of the dropdown is a table with a 'Status' column and a dropdown arrow. The table contains the following rows:

| Status      |
|-------------|
| All         |
| Unallocated |
| Allocated   |
| All         |
| Unallocated |
| Allocated   |

At the bottom of the table, there is a '+ 2018 Fall Core' entry with a status of 'Allocated'.



# Create and Save Custom Distribution Lists

To import and save an external email list, you can paste the list directly into the circled box. Make sure all addresses are separated by a semi-colon “;”. Click “Save this list”

Select Groups ⓘ  
Custom Groups ▼

Email Groups ⓘ

| + Group Name ▼                  | Remove                |
|---------------------------------|-----------------------|
| + 2018 e-sig                    | View/Remove Members - |
| + 2016 volunteers               | View/Remove Members - |
| + 2016 parent emails from eayso | View/Remove Members - |

Recipients  
- Groups  
No Recipient selected

Additional Recipients Clear All ⓘ

emilygollinger@gmail.com;

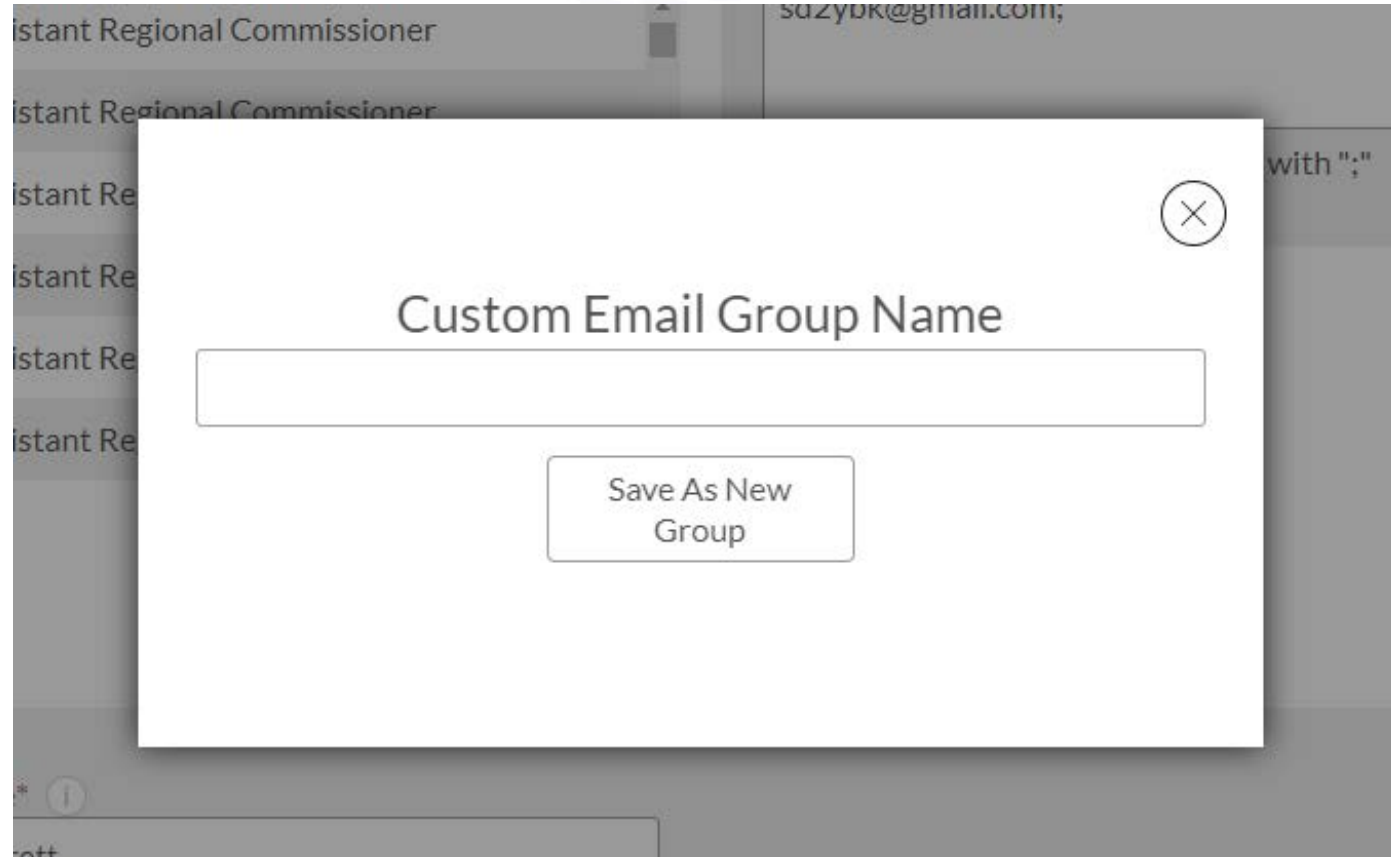
Email addresses must be separated with ";"

Save this list

Compose

# Create and Save Custom Distribution Lists

Name your list and save. Be as accurate as possible as others can see and use any saved custom lists.

A screenshot of a web application interface showing a dialog box for creating a custom email group. The dialog box is white with a grey border and a close button (an 'X' in a circle) in the top right corner. The title of the dialog is 'Custom Email Group Name'. Below the title is a text input field. At the bottom of the dialog is a button labeled 'Save As New Group'. The background of the screenshot is a blurred view of an email distribution list with entries like 'Assistant Regional Commissioner' and an email address 'sdzybk@gmail.com;'.

Assistant Regional Commissioner sdzybk@gmail.com;

Assistant Regional Commissioner

Assistant Re with ";"

Assistant Re

Assistant Re

Assistant Re

Assistant Re

Custom Email Group Name

Save As New Group

\* i

ett

# Create and Save Custom Templates

Now that you've made your list of recipients, you can use existing templates or save your own.

## Compose

From Name\* 

region328rc

Reply To 

Subject\* 



A rich text editor toolbar with various icons for text formatting (bold, italic, underline, text color, background color), alignment (left, center, right, justified), list creation (bulleted, numbered), indentation, and other editing functions. The font is set to Arial and the size to 14px.

Select a Template

Merge Tags

# Create and Save Custom Templates

There are 4 default templates that can be customized and saved as custom templates.

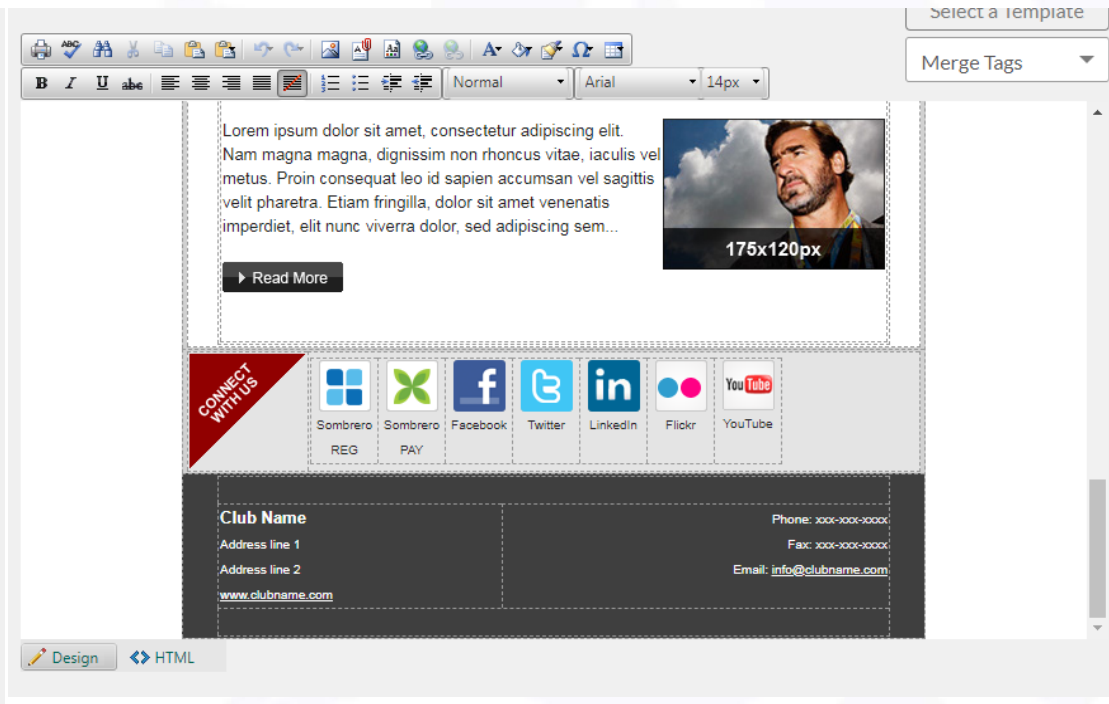
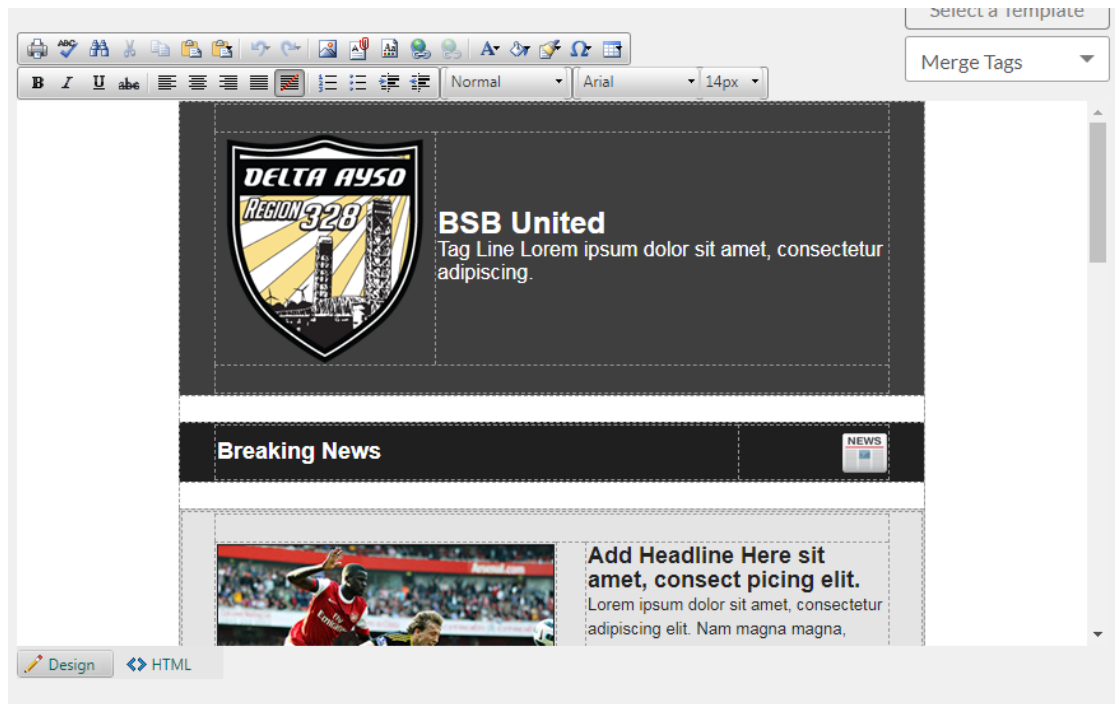
Manage Templates ✕

Default Templates

| Subject |  |
|---------|--|
| 1       | Breaking News <span>Edit</span>        |
| 2       | Field Closing <span>Edit</span>        |
| 3       | General Announcement <span>Edit</span> |
| 4       | Registrations <span>Edit</span>        |

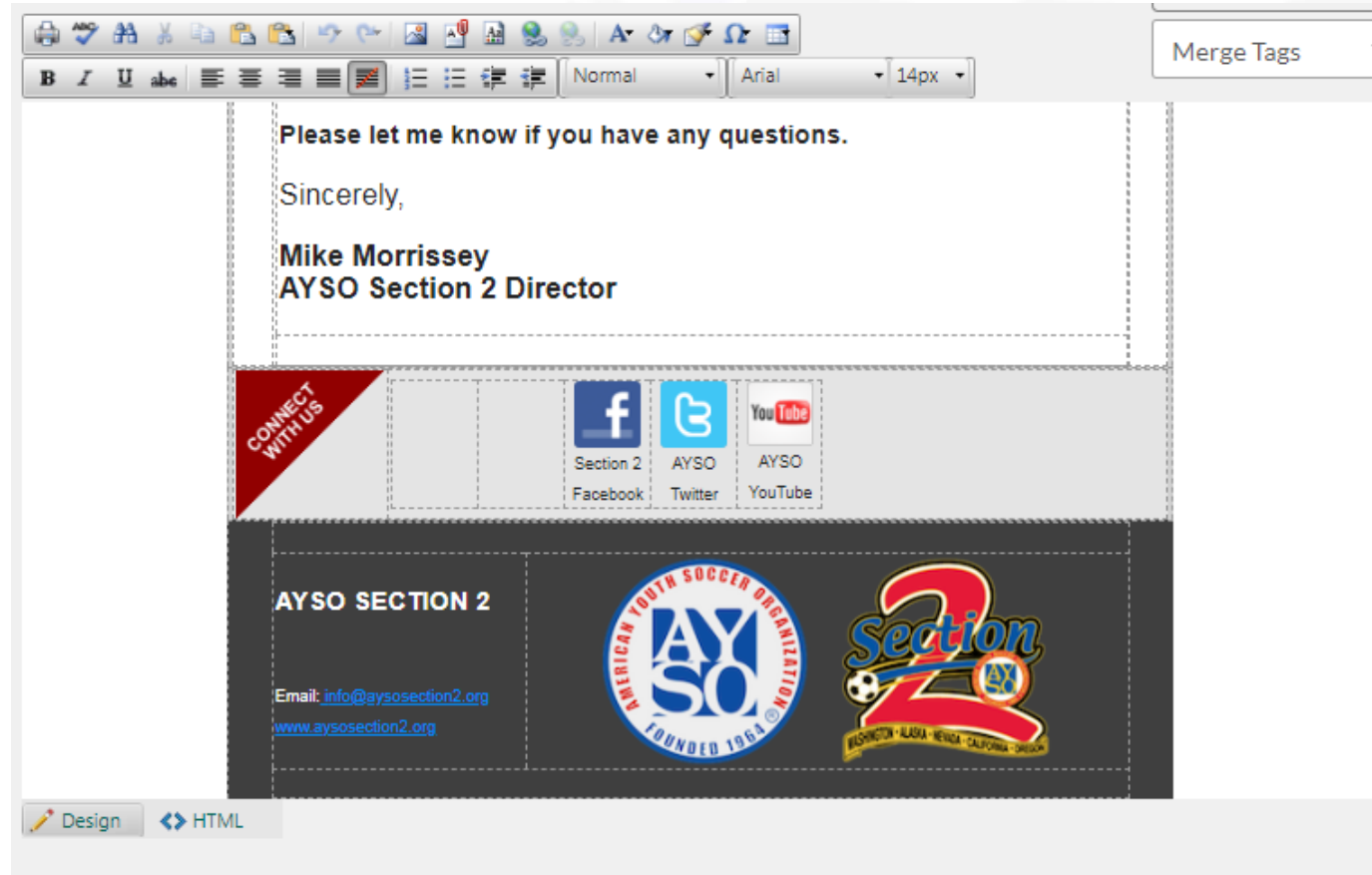
# Create and Save Custom Templates

The first 3 templates (Breaking News, Field Closing, General Announcement) all have a similar layout and come pre populated with your logo.



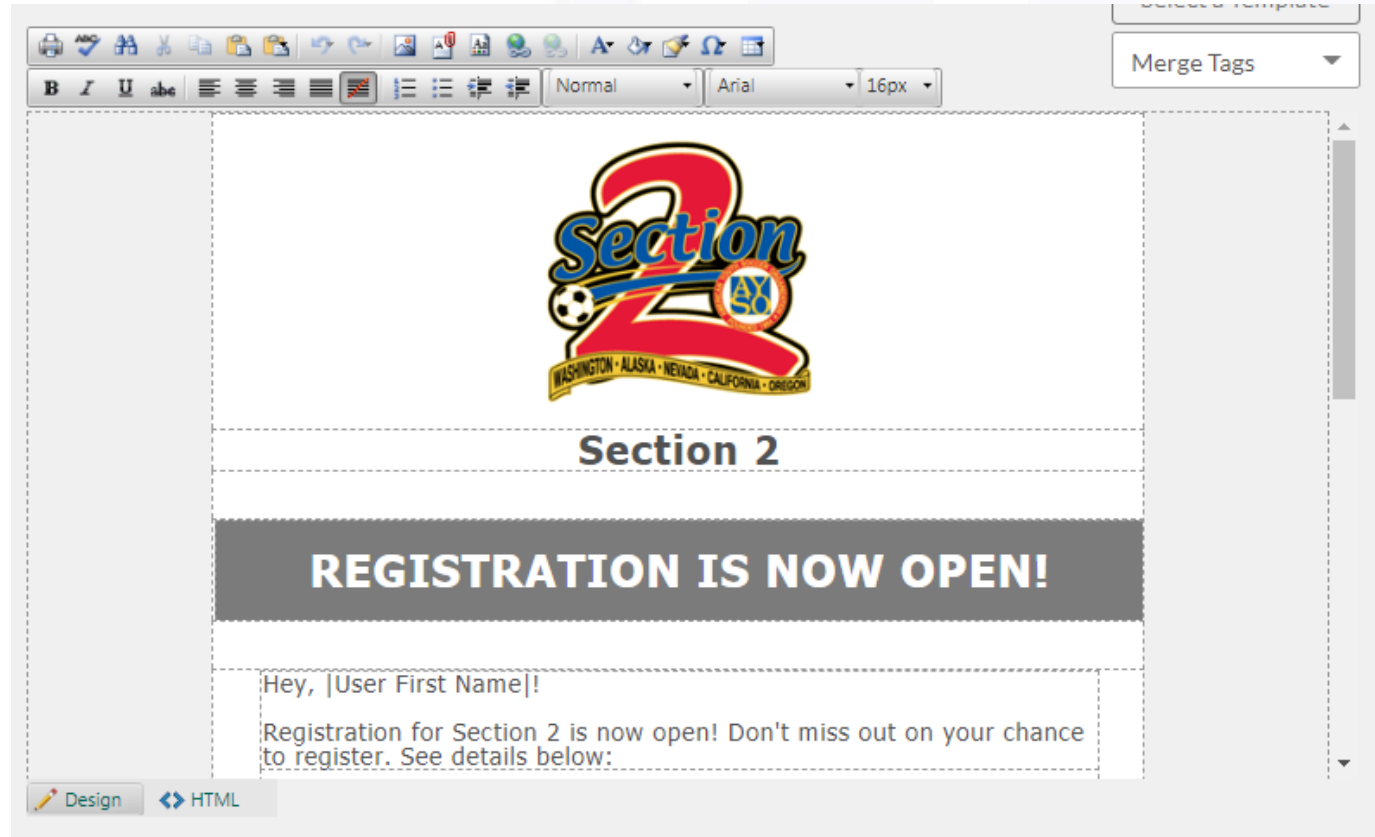
# Create and Save Custom Templates

After you have modified the template with your info and additional logos, contact info, etc., you can save as a custom template to use in future.



# Create and Save Custom Templates

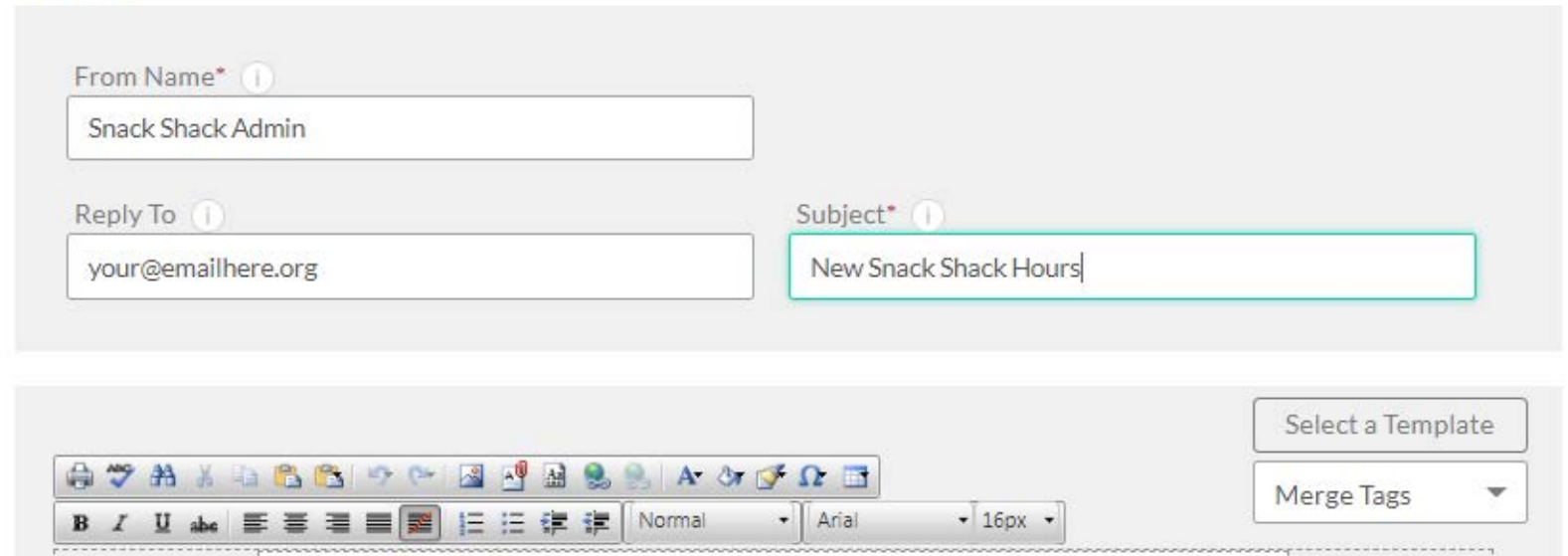
The fourth template, Registration, is more simple in layout and can be used for more than just registration. It can be pre populated with links to your open program registrations.



# Start Emailing!

At the top of the Compose section you can customize the “From Name”, “Reply To” and “Subject” for your current email message.

## Compose



The screenshot shows an email composition window with the following fields and options:

- From Name\***: A text box containing "Snack Shack Admin".
- Reply To**: A text box containing "your@emailhere.org".
- Subject\***: A text box containing "New Snack Shack Hours".
- Buttons**: "Select a Template" and "Merge Tags" (with a dropdown arrow).
- Rich Text Editor**: A toolbar with icons for undo, redo, bold, italic, underline, text color, background color, bulleted list, numbered list, link, unlink, and image. Below the icons, it shows "Normal" as the current style, "Arial" as the font, and "16px" as the font size.



# Start Emailing!

After sending, you will be taken to the Email Statistics screen which will allow you to see the details of your sent email messages.

The screenshot shows the 'EMAIL' management interface. At the top, there are four buttons: 'Bulk Email', 'Email Statistics' (highlighted in orange), 'Manage Email Subscription', and 'Scheduled Emails'. Below the buttons is a green notification box stating: 'Your email is being sent in the background and will be delivered shortly.' Underneath is the 'Email Statistics' section, which contains a table with columns for 'Sent Date', 'Sent By', 'Subject', 'Statistics', 'Message', and 'Email Groups'. The table lists three email entries with their respective dates, times, senders, subjects, and available actions.

| Sent Date           | Sent By        | Subject                | Statistics        | Message | Email Groups |
|---------------------|----------------|------------------------|-------------------|---------|--------------|
| 2/21/19<br>9:40 PM  | Region328admin | New Snack Shack Hours  | Queued<br>Details | View    | Details      |
| 2/20/19<br>10:51 AM | Region328admin | Last minute reminders! | Resend<br>Details | View    | Details      |
| 2/19/19<br>2:02 PM  | Region328admin | RMS Labs Information   | Resend<br>Details | View    | Details      |

# Start Emailing!

After sending, you will be taken to the Email Statistics screen which will allow you to see the details of your sent email messages.

## Email Statistics

| Sent Date ▼  | Sent By ▼      | Subject ▼              | Statistics |              |      | Message | Email Groups |           |         |         |         |      |      |     |   |   |   |   |     |     |
|--|----------------|------------------------|------------|--------------|------|---------|--------------|-----------|---------|---------|---------|------|------|-----|---|---|---|---|-----|-----|
| 2/21/19<br>9:40 PM   | Region328admin | New Snack Shack Hours  | Queued     | Details      | View | Details |              |           |         |         |         |      |      |     |   |   |   |   |     |     |
| 2/20/19<br>10:51 AM  | Region328admin | Last minute reminders! | Resend     | Hide Details | View | Details |              |           |         |         |         |      |      |     |   |   |   |   |     |     |
| <table><thead><tr><th>Queued</th><th>Duplicate</th><th>Unsubs.</th><th>Invalid</th><th>Bounced</th><th>Sent</th><th>Read</th></tr></thead><tbody><tr><td>265</td><td>0</td><td>0</td><td>0</td><td>0</td><td>265</td><td>184</td></tr></tbody></table> |                |                        |            |              |      |         | Queued       | Duplicate | Unsubs. | Invalid | Bounced | Sent | Read | 265 | 0 | 0 | 0 | 0 | 265 | 184 |
| Queued   | Duplicate      | Unsubs.                | Invalid    | Bounced      | Sent | Read    |              |           |         |         |         |      |      |     |   |   |   |   |     |     |
| 265  | 0              | 0                      | 0          | 0            | 265  | 184     |              |           |         |         |         |      |      |     |   |   |   |   |     |     |
| 2/19/19<br>2:02 PM   | Region328admin | RMS Labs Information   | Resend     | Details      | View | Details |              |           |         |         |         |      |      |     |   |   |   |   |     |     |
| 2/17/19  |                | NW EXPO Registration   |            |              |      |         |              |           |         |         |         |      |      |     |   |   |   |   |     |     |

# Questions? Comments? Ideas?

If you have questions about this or any other RMS feature or process we can try and answer them if time allows.

Thank you for your participation!