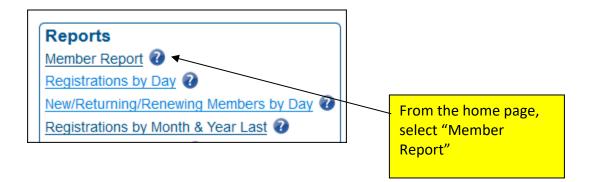# Sending an email message to a selected (queried) group of members

The online registration software allows you to create a database query, and then send an email to the group of members in the results of that query.

You create the query in the Member Report screen, and then click a button to send an email message to that group.
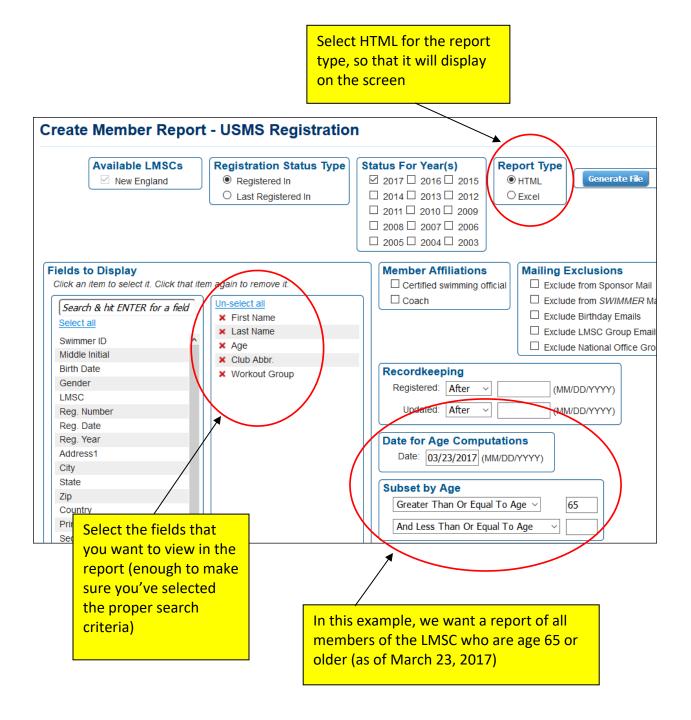
For this example, we want to send an email message to all members in the LMSC who are 65 years of age or older, as of today (March 23, 2017, in this example).
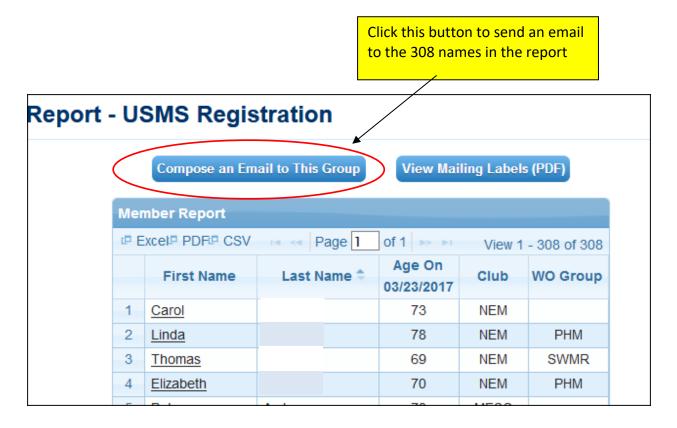

From the home page, select "Member Report"

Continued on next page…

Selecting Recipients

First, create your report query by selecting the desired data and fields. Select "HTML" for the report type (output), which will cause the report to be displayed on your screen.

Select HTML for the report type, so that it will display on the screen

Create Member Report - USMS Registration

Available LMSCs
☑ New England

Registration Status Type
● Registered In
○ Last Registered In

Status For Year(s)
☑ 2017 ☐ 2016 ☐ 2015
☐ 2014 ☐ 2013 ☐ 2012
☐ 2011 ☐ 2010 ☐ 2009
☐ 2008 ☐ 2007 ☐ 2006
☐ 2005 ☐ 2004 ☐ 2003

Report Type
● HTML
○ Excel

Generate File

Fields to Display
Click an item to select it. Click that item again to remove it.

Search & hit ENTER for a field

Select all

Swimmer ID
Middle Initial
Birth Date
Gender
LMSC
Reg. Number
Reg. Date
Reg. Year
Address1
City
State
Zip
Country
Prir
Sec

Un-select all
✖ First Name
✖ Last Name
✖ Age
✖ Club Abbr.
✖ Workout Group

Member Affiliations
☐ Certified swimming official
☐ Coach

Mailing Exclusions
☐ Exclude from Sponsor Mail
☐ Exclude from *SWIMMER* Ma
☐ Exclude Birthday Emails
☐ Exclude LMSC Group Email
☐ Exclude National Office Gro

Recordkeeping
Registered: After ∨ ____ (MM/DD/YYYY)
Updated: After ∨ ____ (MM/DD/YYYY)

Date for Age Computations
Date: 03/23/2017 (MM/DD/YYYY)

Subset by Age
Greater Than Or Equal To Age ∨ 65
And Less Than Or Equal To Age ∨ ____

Select the fields that you want to view in the report (enough to make sure you've selected the proper search criteria)

In this example, we want a report of all members of the LMSC who are age 65 or older (as of March 23, 2017)
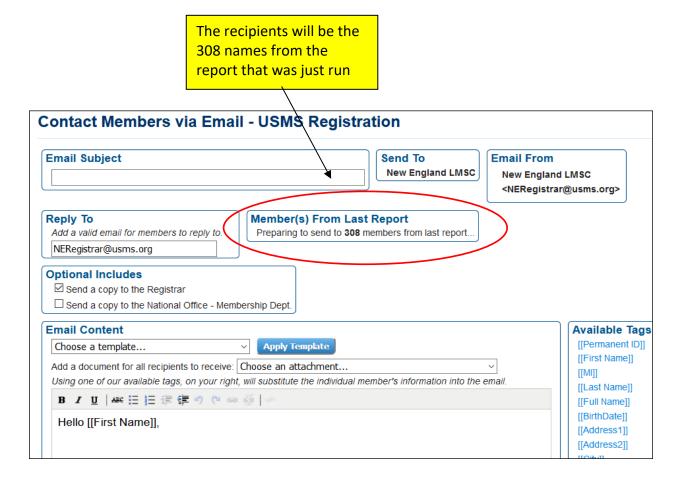
The report will be displayed (last names have been hidden in the below example). Note that the report contains a total of 308 names. At the top of the report, click the button "Compose an Email to This Group" to send an email to the 308 names listed in the report.

Click this button to send an email to the 308 names in the report

Report - USMS Registration

[Compose an Email to This Group]   [View Mailing Labels (PDF)]

Member Report

Excel PDF CSV   ◄ ◄◄ Page 1 of 1 ►► ►►   View 1 - 308 of 308

	First Name	Last Name ⬍	Age On 03/23/2017	Club	WO Group
1	Carol		73	NEM	
2	Linda		78	NEM	PHM
3	Thomas		69	NEM	SWMR
4	Elizabeth		70	NEM	PHM

Continued on next page…

The "Compose Email Message" menu is now displayed. From this point on, sending a message is just like sending any other message through the "Compose Email Message" screen, except that the recipients have been pre-selected from the report (308 recipients in this example).

The recipients will be the 308 names from the report that was just run

Contact Members via Email - USMS Registration

Email Subject

Send To
New England LMSC

Email From
New England LMSC
<NERegistrar@usms.org>

Reply To
Add a valid email for members to reply to.
NERegistrar@usms.org

Member(s) From Last Report
Preparing to send to **308** members from last report...

Optional Includes
☑ Send a copy to the Registrar
☐ Send a copy to the National Office - Membership Dept.

Email Content
Choose a template...   **Apply Template**

Add a document for all recipients to receive: Choose an attachment...

Using one of our available tags, on your right, will substitute the individual member's information into the email.

B *I* U | ABC ≡ ≣ ≢ ≣ ↻ ↺ ∞ ✂ | ✎

Hello [[First Name]],

Available Tags
[[Permanent ID]]
[[First Name]]
[[MI]]
[[Last Name]]
[[Full Name]]
[[BirthDate]]
[[Address1]]
[[Address2]]

Continued on next page…

Composing the message

Here is the default message composition screen.

Contact Members via Email - USMS Registration

Email Subject

[   ]   Preview Email
                                                                  Clear/Reset Email Form

Email Content

Using one of our available tags will substitute the individual member's information into the email.

B *I* <u>U</u> | ABC ☰ ☰ ☰ ☰ ↺ ↻ ∞ ⚮ | ↩

Hello [[First Name]],

Thank you,

John Doe
New England LMSC Registrar
NERegistrar@usms.org
(401) 633-9999

Note the statement for "available tags." This is a powerful feature that allows you to utilize the USMS registration database to customize the message that you are sending. Any time a tag is included, that data is pulled from the database and uniquely inserted into each individual message.

For example, if you use the [[First Name]] tag as shown in the illustration, each message will be populated with the recipient's first name (as pulled from the database).

Clicking the link for the available tags provides a list of all tags. NOTE that the tag names are case-sensitive and must be typed with upper- and lower-case letters exactly as shown.

Available Tags
[[Permanent ID]]
[[First Name]]
[[MI]]
[[Last Name]]
[[Full Name]]
[[BirthDate]]
[[Address1]]
[[Address2]]
[[City]]
[[State Abbr]]
[[Zip]]
[[Country]]
[[MaleOrFemale]]
[[Full Address]]
[[Primary Phone]]
[[Secondary Phone]]
[[Alternate Phone]]
[[Club Name]]
[[Club Abbr]]
[[Full Club Name]]
[[WOGroup Name]]
[[WOGroup Abbr]]
[[Full WOGroup Name]]
[[Registration Link]]
[[Reg Year]]
[[Reg Number]]
[[LMSC Name]]
[[LMSC Registrar]]
[[Registrar Email]]
[[Membership Card Link]]
[[Swimmer Profile Page Link]]

The following table provides an example of how each tag behaves, and an example of the type of result it produces, in the final email message:

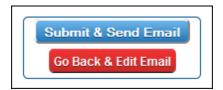| Tag	Result in the email message
[[Permanent ID]]	09017
[[First Name]]	Speedo
[[MI]]	Z
[[Last Name]]	Grilli
[[Full Name]]	Speedo Z Grilli
[[BirthDate]]	1991-04-07
[[Address1]]	123 Dogwood Ln
[[City]]	Londonderry
[[State Abbr]]	NH
[[Zip]]	04321
[[Country]]	USA
[[MaleOrFemale]]	Male
[[Full Address]]	123 Dogwood Ln Londonderry, NH 04321 US
[[Primary Phone]]	800-555-1212
[[Club Name]]	New England Patriots
[[Club Abbr]]	PATS
[[Full Club Name]]	New England Patriots (PATS)
[[WOGroup Name]]	Retrievers
[[WOGroup Abbr]]	RTVR
[[Full WOGroup Name]]	Retrievers (RTVR)
[[Registration Link]]	Click the button or copy and paste the link into your browser to renew your registration. For your security do not forward this personalized link to anyone else. (The Reg Link would appear here)
[[Reg Year]]	2014
[[Reg Number]]	024M-09017
[[Membership Card link]]	Please view and print your 2014 membership card.
[[Swimmer Profile Page Link]]	swimmer profile page

Here is the email message, as written by the registrar:

Email Content

Choose a template... ⌄   **Apply Template**

Add a document for all recipients to receive: Choose an attachment... ⌄

Using one of our available tags, on your right, will substitute the individual member's information into the email.

B *I* <u>U</u> | ABC ☰ ☷ ☷ ☷ ↺ ↻ ⚭ ✂ |

Hello [[First Name]],

You are receiving this message because you are
age 65 or older and you qualify for the
XYZ Senior Olympics swim meet.

Your USMS number is [[Reg Number]].

You can view your swimmer profile page
using this link: [[Swimmer Profile Page Link]]

Thank you,

John Doe
New England LMSC Registrar
NERegistrar@usms.org
(999) 888-7777

Note the use of the tags

Here is the preview of the message that will be sent:

Preparing to send email to 308 recipients, excluding any copies...

Preview Email (Substituting using your information)
Not all links will work in this preview. It is for information only.
Subject Line: Update on XYZ Senior Olympics swim meet

Hello Anna Lea,

You are receiving this message because you are
age 65 or older and you qualify for the
XYZ Senior Olympics swim meet.

Your USMS number is 147W-JHAWK.

You can view your swimmer profile page
using this link: swimmer profile page

Thank you,

John Doe
New England LMSC Registrar
NERegistrar@usms.org
(999) 888-7777

Here is how the tags behave

When you are satisfied with the appearance of the message, click the "Submit & Send Email" button.

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