

PELHAM Training update

Sending emails from PELHAM

In this session we are going to look at how to find your list of email addresses, create and send an email.

Overview:

- Email addresses must be unique within the system
- Member administrators MUST have an email address
- Email addresses for current members are optional, but if supplied must be unique to that current member, not a copy of the parent email address

Current restrictions:

- Email lists containing more than 100 recipients
- Set up distribution lists
- Changing the “reply-to” on the email to something other than branch@pcuk.org

Email options being tested:

- How to send to more than 100 recipients
- “out of the box” distribution lists

Email with no current solution:

- Allowing multiple “reply-to” options (the solution originally identified is not scalable)

Sending emails from PELHAM

The email training videos are split into 2 parts:

Part 1 – how to create your recipient lists

Part 2 – how to create the email, update recipients within the email and send

Emails: find your email lists

- Only views prefixed “EMAIL” should be used to create emails
- **DO NOT use the default “Current Branch Members”** as this will result in an error when you try to send the email, as inevitably some members will not have email addresses set up
- Your default should always be “Email – Current Member Administrators”
- We have added an expired members list so you can continue to target previous members to encourage them to rejoin
- “Email – Current Members with email address” should only contain those members whose parents have given permission (via the form/portal) for that email to be used or for “self-administering” older members
- An expired members list is also available here
- These views are available from within the Branch Summary page AND the Navigation menu

Branch summary page

[Members](#) [Coaches & Volunteers](#) [Achievement History](#)

📄 Current Members 252
Last updated: 23/05/2021 07:06

Current Branch Members (Branch) ▾

System Views

Address List - Current Member Administrators

Address List - Current Members

All Contacts

All Contacts - Addresses

Current Branch Members (Branch)

Current Branch Members (Subgrid)

Current Members with Age/DOB Issue

Deactivated Contacts

Email - Current Members with email addresses

Email - Expired Members with email addresses (last 90 days)

Email - Current Member Administrators

Email - Expired Member Administrators (last 90 days)

Expired Members

Incomplete Applications

Members Expired within last 6 months

Email views (2)

The email views are also available in the **Contact** menu in the Navigation bar.

Current Branch Members (Branch) ▾

- Current Branch Members (Branch) ⌵
- Active Coaches ⌵
- Active Volunteers ⌵
- Address List - Current Member Administrators ⌵
- Address List - Current Members ⌵
- All Contacts ⌵
- All Contacts - Addresses ⌵
- Coaches With Qualifications Expiring Within 3 Months ⌵
- Current Members - Emergency Contacts ⌵
- Current Members - Preferences and Requirements ⌵
- Deactivated Contacts ⌵
- Eligible for Gold Achievement Badge ⌵
- Eligible for Gold Mini Achievement Badge ⌵
- Email - Current Members with email addresses ⌵
- Email - Expired Members with email addresses (last 90 days) ⌵
- Email - Current Member Administrators** ⌵

Membership

- Contacts**
- Current Members
- Membership Appli...

Top tip:

You can select a different view to “pin” and always appear first. If you choose “Email – Current Member Administrators” here and always use this menu for creating emails you are less likely to use the Current Members list by mistake!

To “pin” something for your branch, click the pin in the RH side as highlighted yellow

Becomes Default view

Email - Current Member Administrators ▾

✓ | Pony Club Number ▾ | Full Name ↑ ▾

Emailing current / recently expired member admins

Once you have found your email list, you need to select your email recipients.

Email - Current Member Administrators ▾

Sorted on Last Name

<input checked="" type="checkbox"/>	Pony Club Number ▾	First Name ↑ ▾	Last Name ↑ ▾	Email ▾	Mobile Phone ▾
<input type="checkbox"/>	[blurred]	[blurred]	Al[blurred]	[blurred]@gmail.com	[blurred]
<input type="checkbox"/>	[blurred]	[blurred]	Allison	[blurred]@outlook.com	[blurred]
<input type="checkbox"/>	[blurred]	[blurred]	Al[blurred]	[blurred]	[blurred]
<input type="checkbox"/>	[blurred]	[blurred]	Andrews	[blurred]@googlemail.com	[blurred]



Reminder: this symbol is system generated when a new contact is created and has no relevance for Pony Club. It disappears over time.

Email - Current Member Administrators ▾

Press Tick to select all records

Top tip:
Click the top arrow and drag down to select multiple records:

<input checked="" type="checkbox"/>	Pony Club Number ▾	First Name ↑ ▾
<input checked="" type="checkbox"/>	[blurred]	Amy
<input checked="" type="checkbox"/>	[blurred]	Suzanne
<input checked="" type="checkbox"/>	[blurred]	Amanda
<input checked="" type="checkbox"/>	[blurred]	Libby
<input checked="" type="checkbox"/>	[blurred]	Sophie



All # A

1 - 157 of 157 (157 selected)

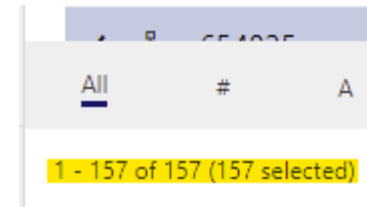
Indicates number of records selected.
NB: more than 100 needs to be split - next slide

Emails – more than 100 recipients

Unfortunately, due to an issue in the way emails are handled when there is integration, it is not possible to email more than 100 people at any one time.

This issue affects larger branches, currently approx. 15 branches will need to follow these guidelines.

Guide: if you have ~ 140 plus members, you could encounter this. You will be able to tell by using the Email – Current Member Administrators in the Navigation panel and checking the number at the bottom:



We are looking into a way around this but for now, you will need to select your email recipients manually.

To do this, familiarise yourself with the person who is around 90th in your email view (this will give you some leeway with members being added to the system).

Instead of Selecting all, use the ability to select and drag until you get to that record, then create your email.

You will then need to copy and paste the content, and create a second email to complete sending to all members administrators.

NB: No branch has more than 165 member administrators.

Emails: more than 100 recipients

Select recipients for first email:

Email - Current Member Administrators ▾

✓	Pony Club Number ▾	First Name ↑ ▾	Last Name ↑ ▾	Email ▾
✓	1007315	Summa	Yoland	summa.yoland@pelham.co.uk
✓		Catherine		
✓		Fiona		fiona@pelham.co.uk
✓		Sonia		sonia@pelham.co.uk
✓		Hazel		hazel@pelham.co.uk
✓		Victoria		victoria@pelham.co.uk
✓		Henry		henry@pelham.co.uk
✓		Lucy		lucy@pelham.co.uk
✓		Michael		michael@pelham.co.uk
✓		Louise		louise@pelham.co.uk
✓		Yoland		yoland@pelham.co.uk

Select recipients for second email:

Email - Current Member Administrators ▾

✓	Pony Club Number ▾	First Name ↑ ▾	Last Name ↑ ▾	Email ▾
		Henry		henry@pelham.co.uk
		Lucy		lucy@pelham.co.uk
	1007315	Michael		michael@pelham.co.uk
		Louise		louise@pelham.co.uk
		Yoland		yoland@pelham.co.uk
✓		Saskia		saskia@pelham.co.uk
✓		Lieset		lieset@pelham.co.uk
✓		Jo	K	jo.k@pelham.co.uk
✓		Rosalind		rosalind@pelham.co.uk
✓		Kate		kate@pelham.co.uk
✓		Kelly		kelly@pelham.co.uk
✓		Sally		sally@pelham.co.uk
✓		Heidi		heidi@pelham.co.uk
✓		Caroline		caroline@pelham.co.uk

Using other views to send Email

Follow the above steps for the other email views, such as current members and expired members/member administrators

When the system was originally developed, it was quick and easy to add other views to an email using the BCC search function.

Unfortunately, Microsoft have delivered an “improvement” which has made this more complex now as you have to select individual members.

NB: if you want to do this however, it is still possible – see “creating email – 2”

Emails to coaches and volunteers:

- To email coaches, you **MUST** use the Active and Expired coaches and Active Volunteers views in the Navigation menu as long as all contacts have an email.
- If they don't please **DESELECT** them as the email will error otherwise

Active Coaches ▾						
✓	Pony Club Num... ▾	First Name ▾	Last Name ↑ ▾	Branch ▾	Centre Name ▾	Email ▾
		David		Heythrop Hunt	---	
		Charlotte		Heythrop Hunt	---	
		Tabitha		Heythrop Hunt	---	
		Honor		Heythrop Hunt	---	
		Amelia		Heythrop Hunt	---	
		Tom		Heythrop Hunt	---	
		Fran		Heythrop Hunt	---	

If coach has no email, will error

Sorting members to send emails

To “sort” members by age, test taken etc you need to export the data to Excel to manipulate. By using the Current Members list you should have all the information you required, including the parent email address. It is then possible to create a Group email and then copy and paste the parent email address from your Excel spreadsheet back into your email and send.

Once you have your list of email addresses available, you can select and copy and paste the email addresses into the BCC “Add more records”

Email Related

From	Branch Heythrop Hunt
To	Branch Heythrop Hunt
Cc	---
Bcc	<input type="text" value="pbell@hotmail.co.uk a...@hotmail.com ...hotmail.com ...co.uk ...ol.com"/>

The system will then convert them to the contact record names on file and remove any duplicates.

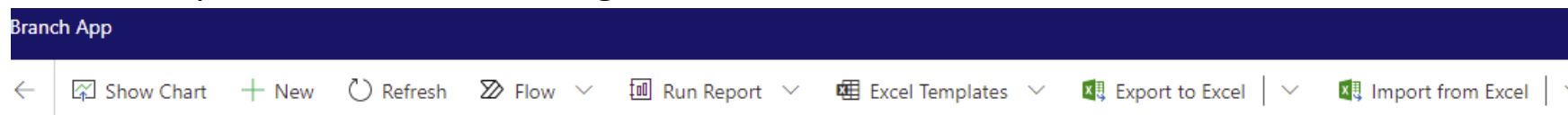
George	Emily Campbell	Bird	Pe	
<input type="text" value="Add more records"/>				

Creating the email

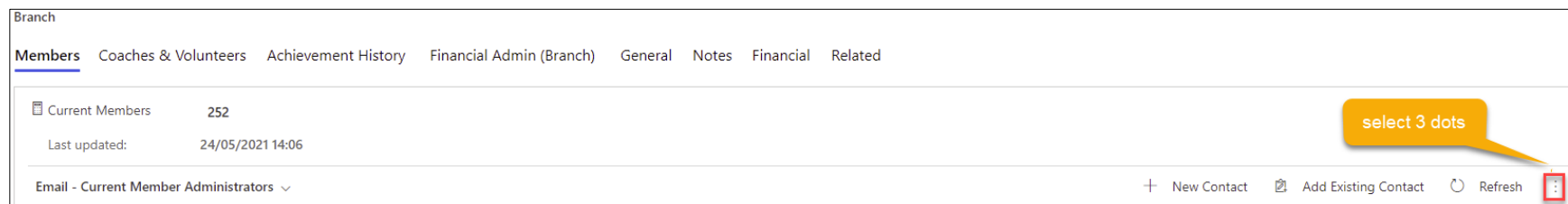
Once you have your recipient list selected, select "Send Group Email" if using Navigation menu view.

If from Branch Summary page, click the 3 vertical dots

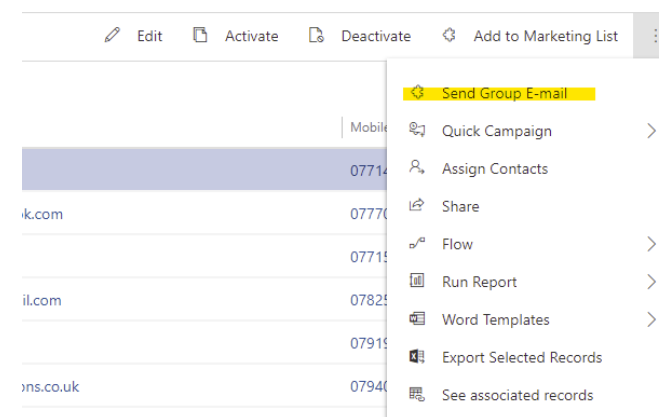
Menu options BEFORE selecting records:



Menu options AFTER selecting records:



In both cases, the **Send Group Email** option only appears once records are selected.



Creating the email

Once you have selected "Send Group Email" the following screen appears and the recipients should be listed under BCC. If this is complete, you can start creating your email.

Send Group Email
Email · Email ▾

Email Related

From	Branch Heythrop Hunt
To	Branch Heythrop Hunt
Cc	---
Bcc	📧 / 📧 / 📧 / 📧 / 📧 / +38
Subject	Send Group Email

Update the Subject

Format Text, add pictures

Start typing your email

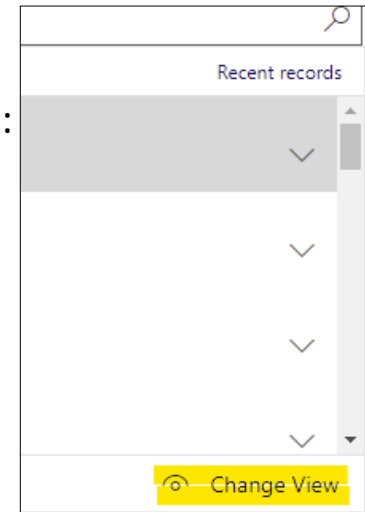
Creating the email - 2

If you wish to add further recipients you can do this several ways:

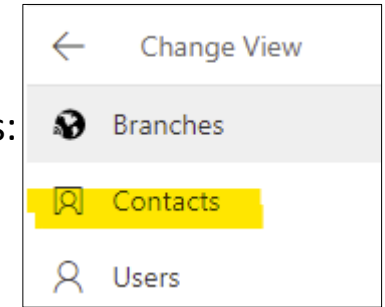
1: Hover over the BCC til the magnifying glass appears:



2: Select Change View:



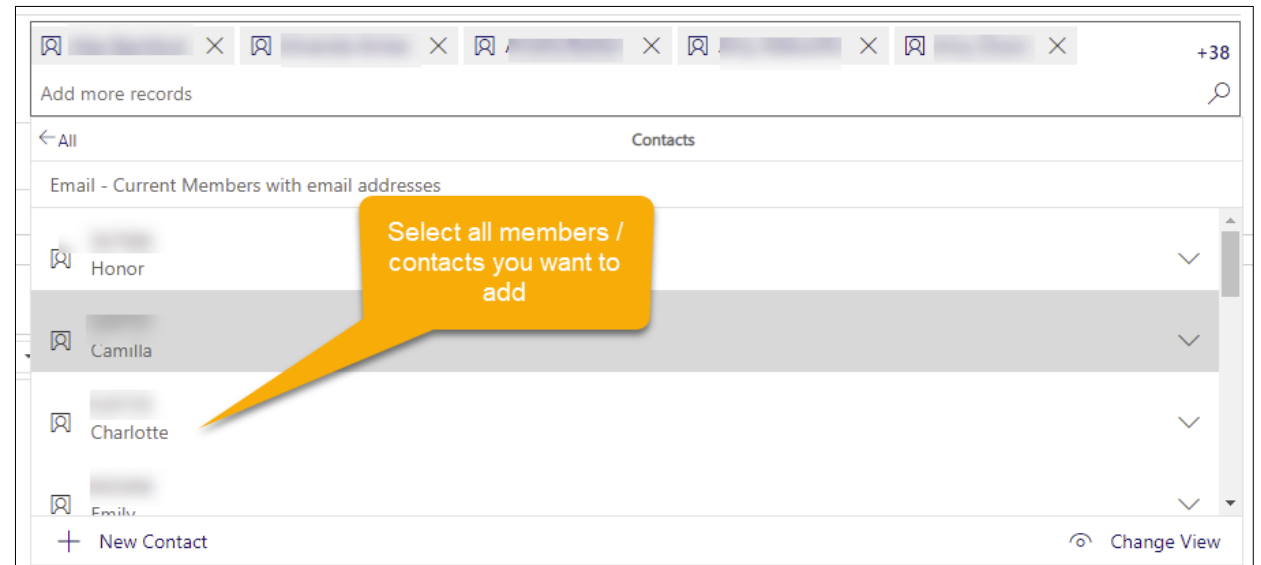
3: Select Contacts:



4: Select the view you want to add (need to scroll down):



5: Then click members unfortunately one by one. Full name is not always displayed here.

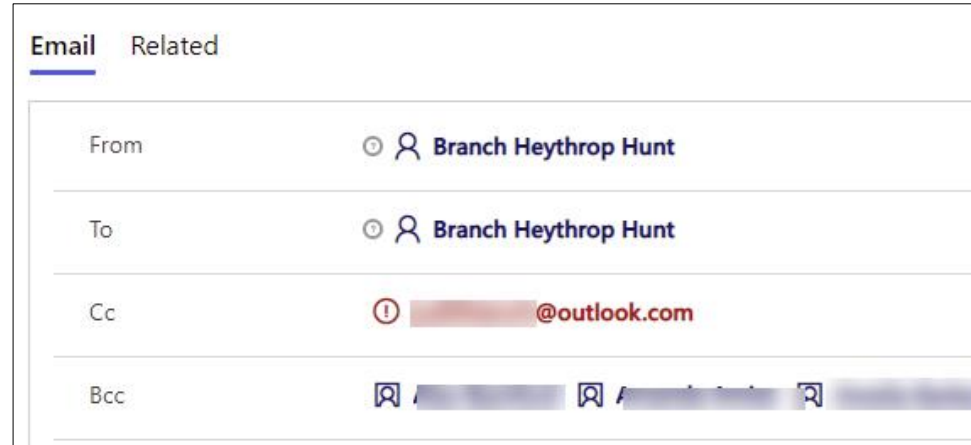


This saves you having to send the mail multiple times

Creating the email - 3

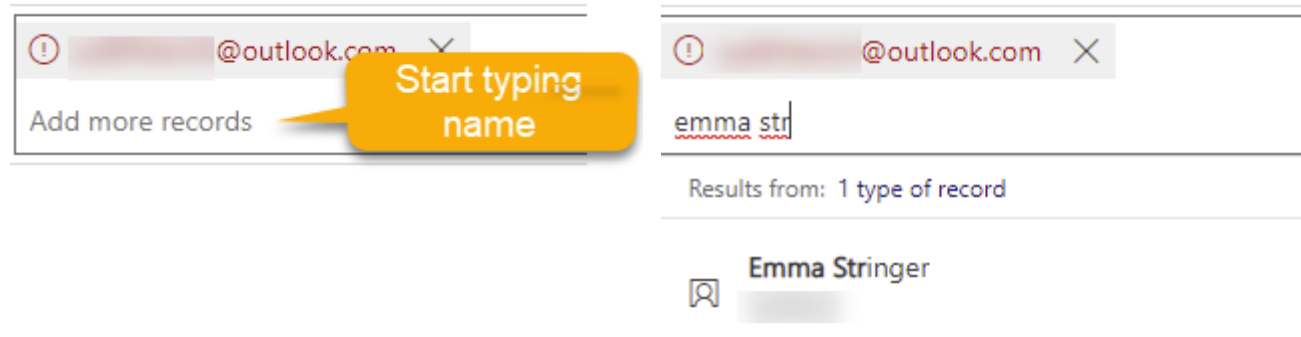
If you wish to add further individuals, you have other options:

1: Add individual email address which does not exist in the system. Appears in Red to denote contact not on system.



Email	Related
From	Branch Heythrop Hunt
To	Branch Heythrop Hunt
Cc	[Red placeholder] @outlook.com
Bcc	[Red placeholder] [Red placeholder] [Red placeholder]

2: add individual who does not exist by typing in the contact name – you will need to ensure they had an email set up



Start typing name

emma str

Results from: 1 type of record

Emma Stringer

REMEMBER: when adding recipients in this way you will not get a warning if you hit the 100 limit so be aware

Creating the email -4

Once you have all the recipients added, you can start to create the email. Standard options are available to format text.

Send Group Email
Email · Email

Email Related

From Branch Heythrop Hunt

To Branch Heythrop Hunt

Cc ---

Bcc [redacted] [redacted] [redacted] [redacted] [redacted] +38

Subject Send Group Email

Update the Subject

Format Text, add pictures

Click for Full Screen

Start typing your email

Branch App

Send Save Save & Close Refresh Check Access Attach File Insert Template Insert Signature

Send Group Email
Email · Email

Use this to attach file to be sent

If created, you can insert signature

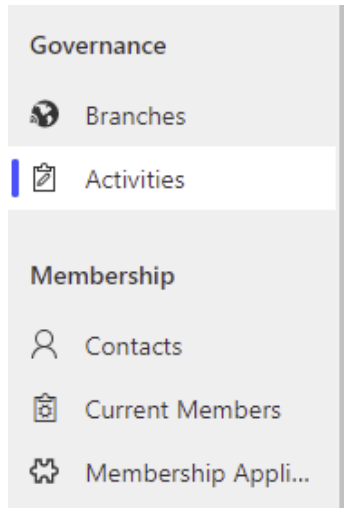
Use the Attach File option in the top menu to select a file to be sent with the email. You can also add signatures here if set up.

Send Save Save & Close

Once you are happy with the email, you can Send. Or Save for later. If you need to send multiple emails, then don't forget to copy your content before sending.

Tracking the email

Once you have sent the email, it will appear in your Branch Activities, along with all other emails regarding membership sent by the system to your branch members



All Activities ▾

Due: All ▾ Activity Type: All ▾

<input checked="" type="checkbox"/> Activity Type ▾	Subject ▾	Regarding ▾	Activity Status ↓ ▾
Email	Your Pony Club membership application h: 1 [redacted]	Membership (Ir	Completed
Email	New Pony Club Application Submitted [redacted]	- Application.	Completed
Email	New Pony Club Application Submitted [redacted]	- Application.	Completed
Email	New Membership Application – The Pony [redacted]	- Application.	Completed
Email	EASTER ROUND UP AND [redacted]	---	Completed
Email	[redacted] FUTURE HHPC R [redacted]	---	Completed

Emails with Status Open have not been sent. Status will update to Completed when send successfully.

Tracking the email - 2

You can also view all emails sent to a branch member/member administrator from their contact record.

First, select Related dropdown, Activities: Summary Addresses Family Membership Achievements Coach/Volunteer Preferences Related

Basic information

Related - Common

Activities

Show Chart + New Activity Add Existing Activity

Next, select All Activities

Open Activity Associated View

- System Views
- Open Activity Associated View
- All Activity Associated View
- All Planning Activities Associated View
- Closed Activity Associated View
- Open Planning Activity Associated View
- All Activities

Activity Type

- All
- Email
- Email
- Email

You may have to change filter on Date Sent Newest to see the most recent emails sent.

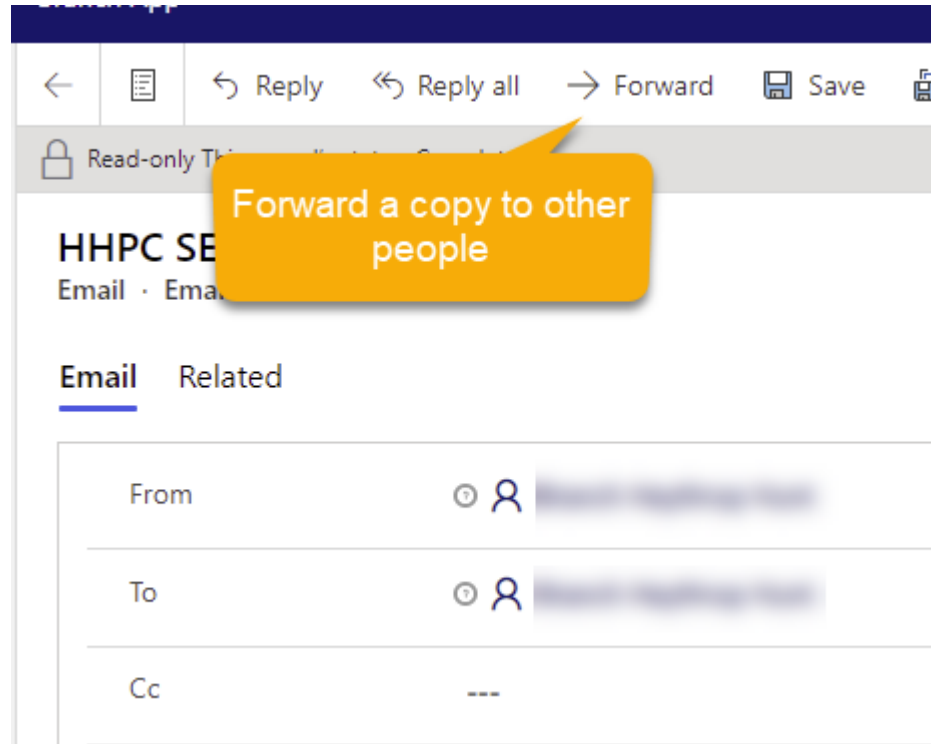
All Activities

Due: All Activity Type: All Include related: On

Activity Type	Subject	Regarding	Activity Status	Date Sent
Email		---	Completed	22/04/2021 22:02
Email		---	Completed	22/04/2021 21:44
Email		---	Completed	24/03/2021 07:07
Email		---	Completed	16/03/2021 14:05
Email		---	Completed	10/03/2021 20:30
Email		---	Completed	10/03/2021 20:12
Email		---	Completed	06/03/2021 08:42
Email		---	Completed	21/02/2021 16:46

Other actions

Once sent, you can review the email and if necessary forward to other people.



Update Email Address - detail

Full guidance is in the Pelham user guide.

- Duplicate email addresses are not permissible in the system.
- Following the migration, many correct email addresses were attached to the member, not the member administrator.
- Most of that has been resolved now, however if you need to change a member admin email address:
 - you must **check FIRST** if the same email already exists on the member, or elsewhere in the system, and remove if so.

Top tip:

To check if an email address is in the system multiple times, use the Search function which will return all records associated with that email address. You can then remove it from those records and update the record you need

Update Email Address - detail

Step 1

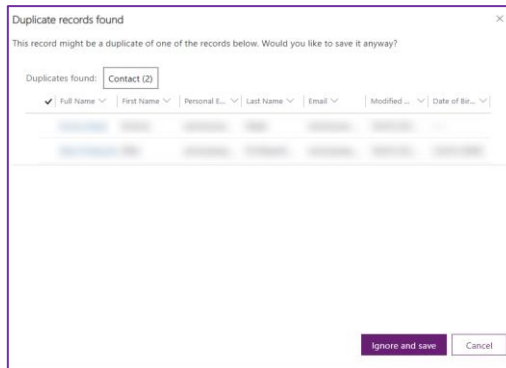
Contact Details	
Primary Email	beryl.stringer@pcuk.org
Preferred Email	Personal
Personal E-mail	beryl.stringer@pcuk.org
Work E-mail	---

Is driven from Preferred Email. Cannot be updated directly

Normally this is the email to change

Step 4

If this screen appears, press Ignore and Save as it sometimes counts the Primary email as a duplicate



Duplicate records found

This record might be a duplicate of one of the records below. Would you like to save it anyway?

Duplicates found: Contact (2)

Full Name	First Name	Personal E-mail	Last Name	Email	Modified	Date of Birth
...
...

Ignore and save Cancel

Step 2

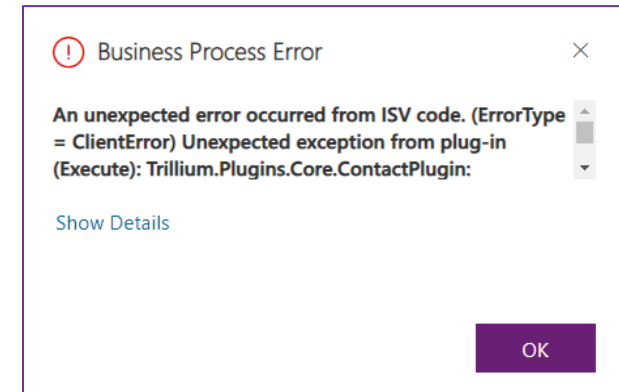
Contact Details	
Primary Email	beryl.stringer@pcuk.org
Preferred Email	Personal
Personal E-mail	beryl.stringer@pcuk.org
Work E-mail	---

Delete and type correct address

Step 3 **PRESS SAVE**

Step 5

If this screen appears, there is definitely a duplicate. If you cannot find it, please raise a support ticket as it may be that the duplicate is on a record that you do not have access to. We will then resolve the issue.



Business Process Error

An unexpected error occurred from ISV code. (ErrorType = ClientError) Unexpected exception from plug-in (Execute): Trillium.Plugins.Core.ContactPlugin:

Show Details

OK

This concludes the video on Emailing within
PELHAM

For more detailed guidance, use the user guides
to be found on here

<https://pelham.pcuk.org/index.php>