Static & Dynamic Groups

2016 - Winter Edition

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Overview

Communicating with your entire membership at once is sometimes the best method, especially when sending out important communication that is relevant to all members. When communication only applies to a group of members, it is best to use **target marketing** in emails to effectively deliver the message. In order to use **target marketing, Dynamic and Static Groups** should be employed. **Dynamic Groups** automatically add members based on defined rules from the **Directory** and **accounting system**. **Static Groups** are created by manually adding members, or allowing for **opt-in/opt-out groups.**

Use Case(s)

Dynamic and Static Groups are best used when using **target marketing** to send detailed communication to **member groups. Dynamic Groups** are set by defined rules that pull from the **Directory or accounting system. Dynamic Groups** may be groups such as: birthdays this month, balance overdue, or membership type. **Static Groups** are created by manually adding members to groups, but these groups may also be **opt-in/opt-out**, so that members may choose to be included in the group. **Static Groups** may include: Bridge Club, Board of Directors, or to receive a monthly Social Newsletter.

Group Definitions

Static Group: groups that include specific members that were placed there manually. These can be **inclusion** or **exclusion** groups.

Static Opt-In Groups: special static group that allows members to opt-in to the group. Members can **opt-in/opt-out** by accessing their **Profile** page in the **Member Directory**.

Dynamic Groups: groups that automatically include members based on rules you define from the **Directory** or **accounting system.**

Note: in order for any of these groups to work properly, all information in the **Member Directory** must be up-to-date.

To access **Static & Dynamic Groups** follow the steps below depending on your access role.

Admins: Hover over **Admin** bar in the left hand corner of the screen, select **Dynamic Groups or Groups.** Note: these are linked in the same interface, so you can toggle between the two once you either click **Dynamic Groups or Groups.**
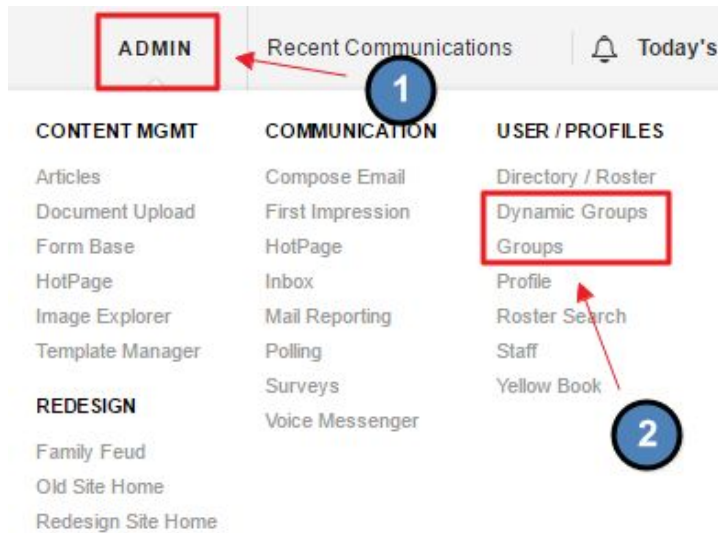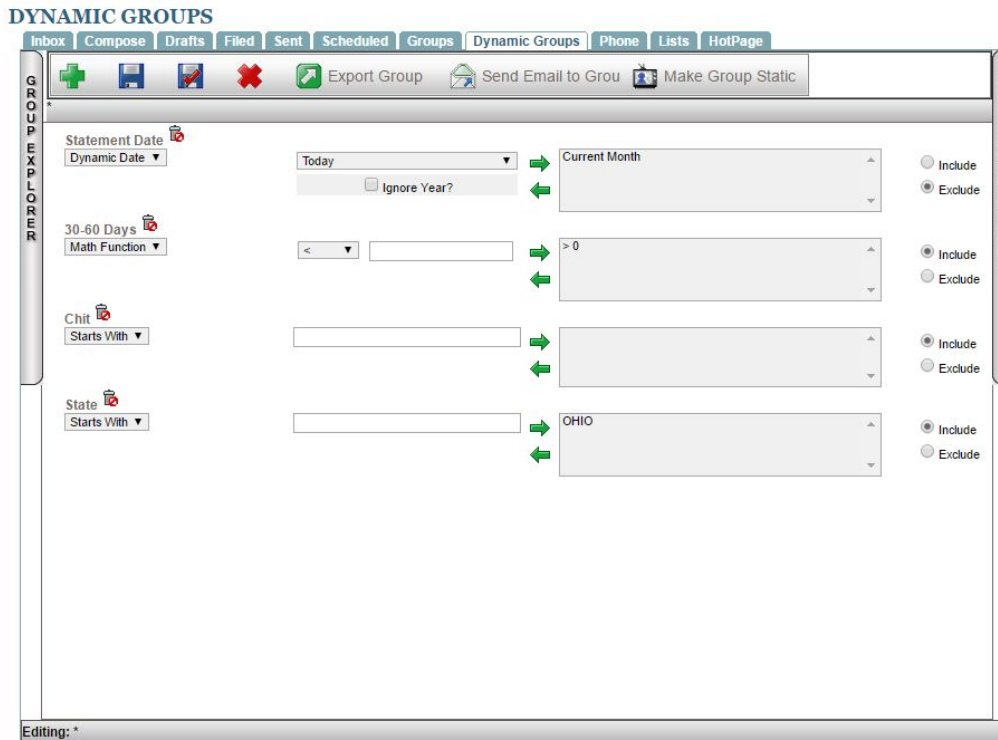
Editors: Hover over **Admin** in the main navigation, select **Main Tools**, and then **Inbox/Groups.**

The following **Groups Interface** screen will launch depending on which path you choose, either **Dynamic** or **Static.**

From **Dynamic Groups:**

From **Static Groups:**

Since both groups are in the same interface, use the **tabs** to toggle between either **Static** or **Dynamic Groups:**

Static Groups

Static Groups Interface

Inclusion Groups: lists all groups that are **Inclusion Groups,** meaning any member in this group will receive communication sent to this group.

Exclusions Groups: lists all groups that are **Exclusion Groups,** meaning any member in this group will NOT receive communication sent to this group. By default, anyone NOT listed in this group will receive communication. This is rarely used, and is usually on used if a select few people wish to NOT receive communication sent to **ALL MEMBERS.**

Adding Static Groups

Click the **Add Group** link.
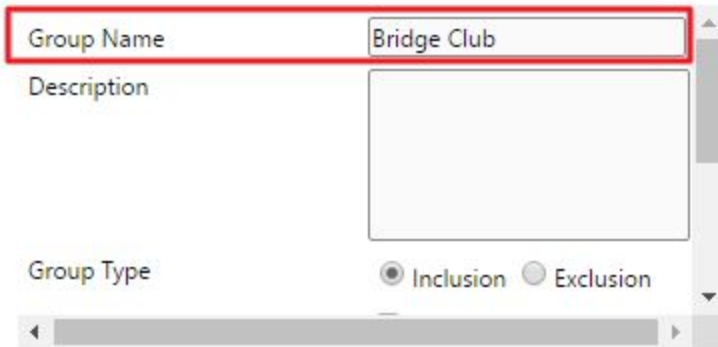
The **Add Group Interface** will show as follows:

Add a **Group Name**, which should be detailed based on the type of group.

Add New Group
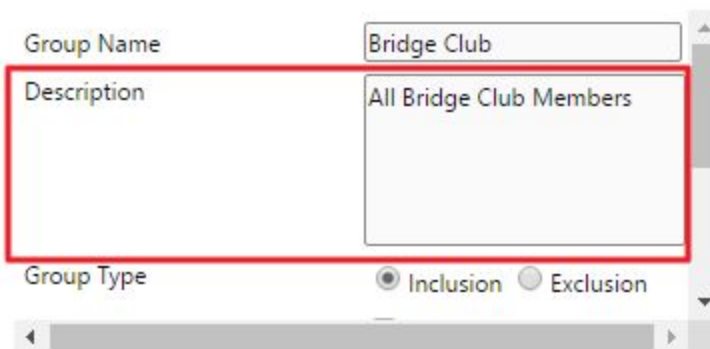
Group Name	Bridge Club
Description	
Group Type	● Inclusion ○ Exclusion

Add a **Description** if desired, which would be a few sentences explaining the group.

Add New Group

Group Name	Bridge Club
Description	All Bridge Club Members
Group Type	● Inclusion ○ Exclusion

Choose a **Group Type, Inclusion** or **Exclusion.**

Check the **Opt-In Group** box if members are allowed to **Opt-in/Opt-out** of the group.

Show Member Listing will allow members to see who belongs to the group.

Allow Invitation by Members gives members the authority to invite other members to the group via email.

Only Allow Actions If in Group gives the above permission only if the member is in the group.

Add New Group

Opt-In Group	☑
Show Member Listing	☐
Allow Invitations by Members	☐
Only Allow Actions if in group?	☐
Group Category	None ▼

Create Group

Choose a **Group Category** if categories are created to organize type of groups.

Add New Group

Opt-In Group	☑
Show Member Listing	☐
Allow Invitations by Members	☐
Only Allow Actions if in group?	☐
Group Category	**None ▼**

Create Group

Click Create Group to continue.
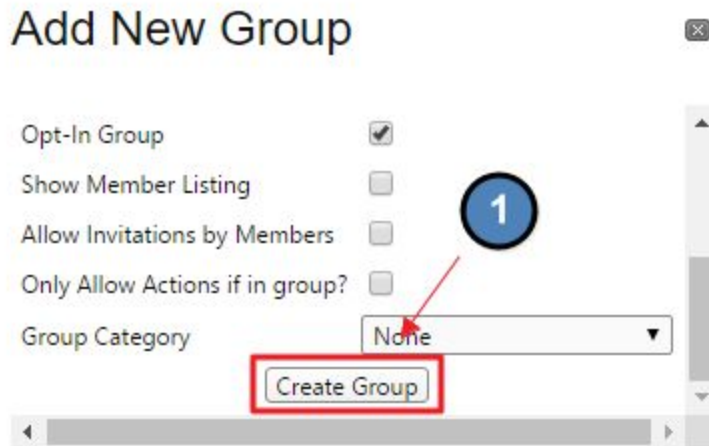
Click **'Click here to Continue'** to add members to the group.

You may now begin adding members to the group using the **Add Members Interface.**

Click Add Members to Group to pull up the **Directory Listing**.

This will bring up the **Select Members Interface.**

Select Members

Search by Last Name, Member #, or Email   [ABC...]

[   ] [Search] [Save Group Members]
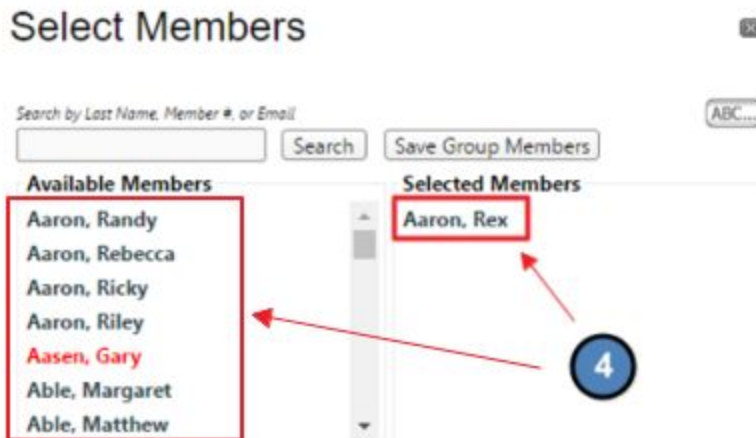
Available Members	**Selected Members**
Aaron, Randy	*No Results Found*
Aaron, Rebecca
Aaron, Rex
Aaron, Ricky
Aaron, Riley
Aasen, Gary
Able, Margaret

Scroll through the member name display and **click** on the member's name in the **Available Members** column to move the member to the **Selected Members** box.

Select Members

Search by Last Name, Member #, or Email   [ABC...]

[   ] [Search] [Save Group Members]

Available Members	**Selected Members**
Aaron, Randy	Aaron, Rex
Aaron, Rebecca
Aaron, Ricky
Aaron, Riley
Aasen, Gary
Able, Margaret
Able, Matthew

④

By default, only members with a last name starting with A will appear. Use the **ABC…** box to choose a different letter to continue to add members.
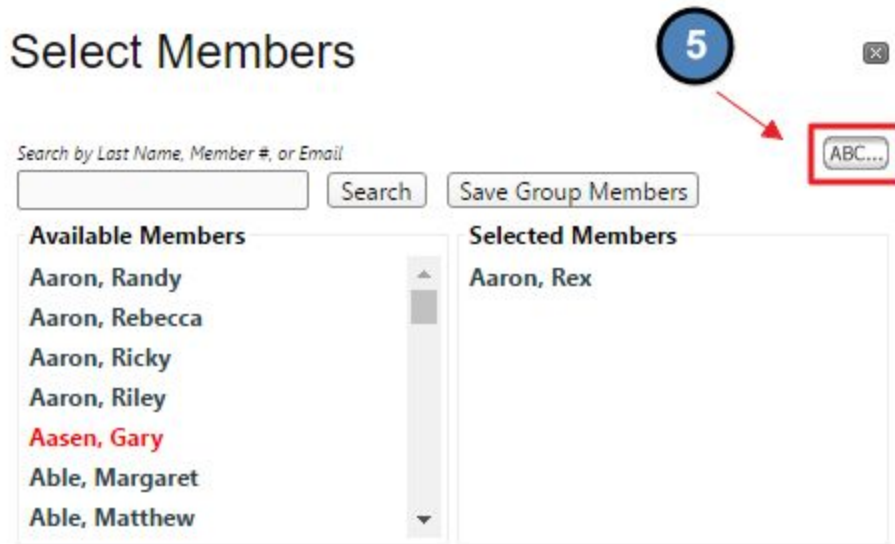
You may also use the **Search Box** to search for members by last name, member number, or email.
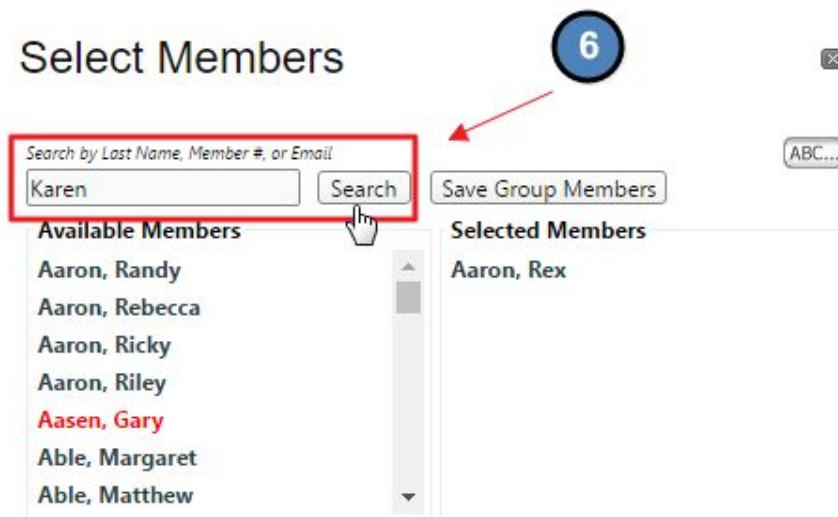
Once all members are added, click **Save Group Members** to add the members to the group.
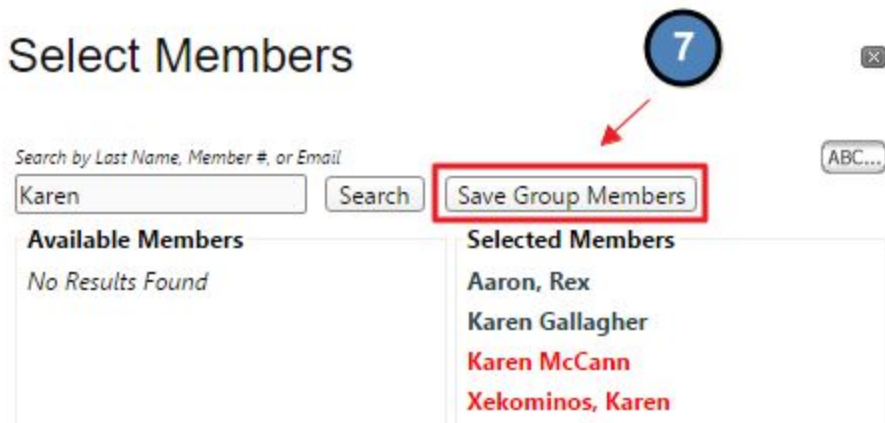
You may also create a **Staff Only** Group by following the same above steps, but add **Staff** by clicking on the **Add Staff to Group** button.
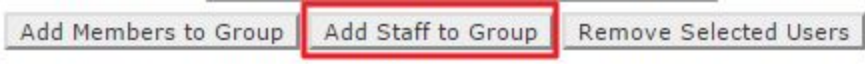
To **Remove Users**, click on the box next to the user's name and then click the **Remove Selected Users Box.**

Members Joining Opt-In Groups

Members can join **Opt-In Groups** in several ways.

Opt-In Groups will show on member's profiles, so they can easily join and leave groups.

You may also add an **Opt-In Group Plugin** to a designated page(s) to market groups. Clubessential can assist with adding this plugin to a page as needed.

For future Special Events, be sure to check back on our Special Events page,
Special Events Newsletter here.

We look forward to making your special days memorable!

OPT IN GROUPS
- ☐ Select All
- ☐ Andrea's Group
- ☐ Ballroom Text Message 👥
- ☐ Birthday Cake 👥
- ☐ Bridge Club
- ☐ car club
- ☐ Creative Writing Group ✉ 👥
- ☐ Early Birds
- ☐ Electronic Statement Only

[Update Opt In Groups]

Newsletters are another great way to advertise **Opt-In Groups,** and offer a way for members to **opt-in/opt-out of** various groups. At the bottom of every **Blast Email** will be an **Unsubscribe Link**.

We look forward to seeing you!

Grand Key Club

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Clubname Country Club.   1234 Country Club Drive City,ST 45000   513.123.4567

This message was sent to Emily Latham elatham@clubessential.com by Grand Key Club
Click here to unsubscribe from further communications
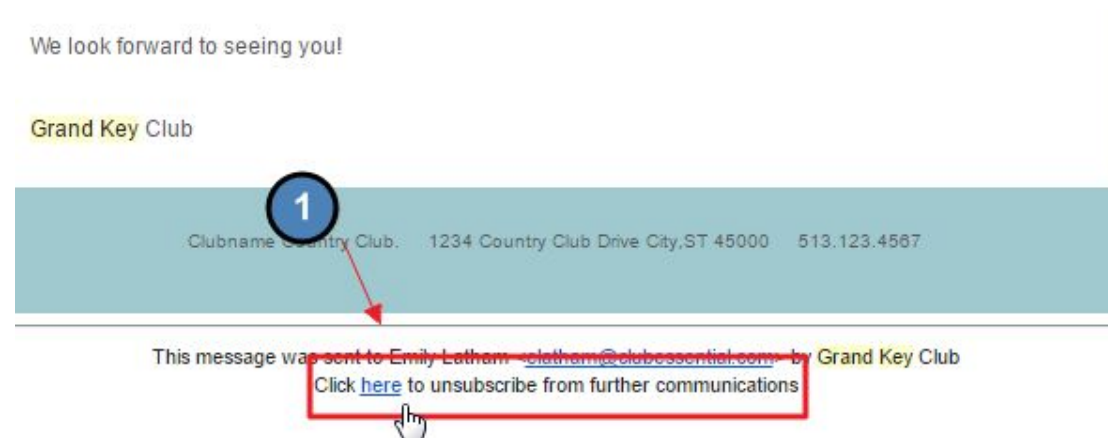
The **Unsubscribe Link** will take the user to a list of all **Opt-In** groups, whereupon they may update what groups they are in.

Emailing Static Groups

Emails can be sent to **Static Groups** in two ways, either from the **Groups** tab or by using the **Compose Email** interface.

To send from the **Groups** tab, **click** on the group name in the **Groups** tab.

Next, click on the **Send Group Email** link.
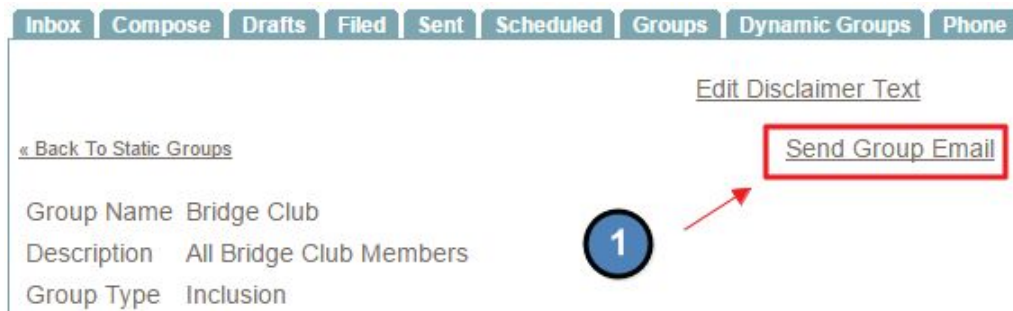
This will bring you to the **Compose Email Interface** where you may compose your email.
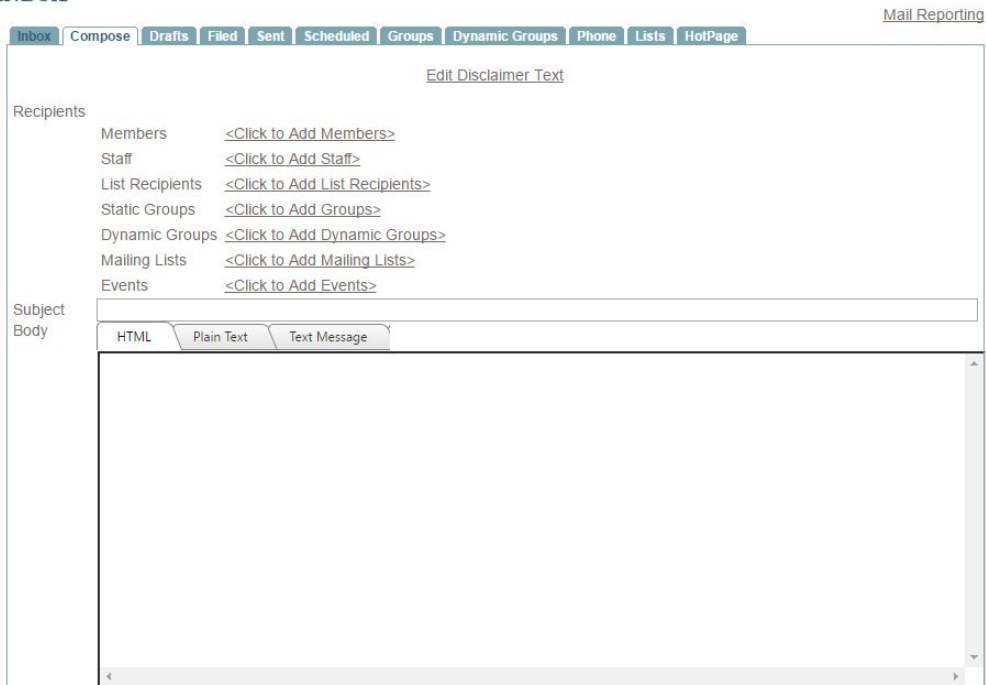
To send from the **Compose Email**, go to the **Compose Email Interface.**

Click Add Static Groups link.
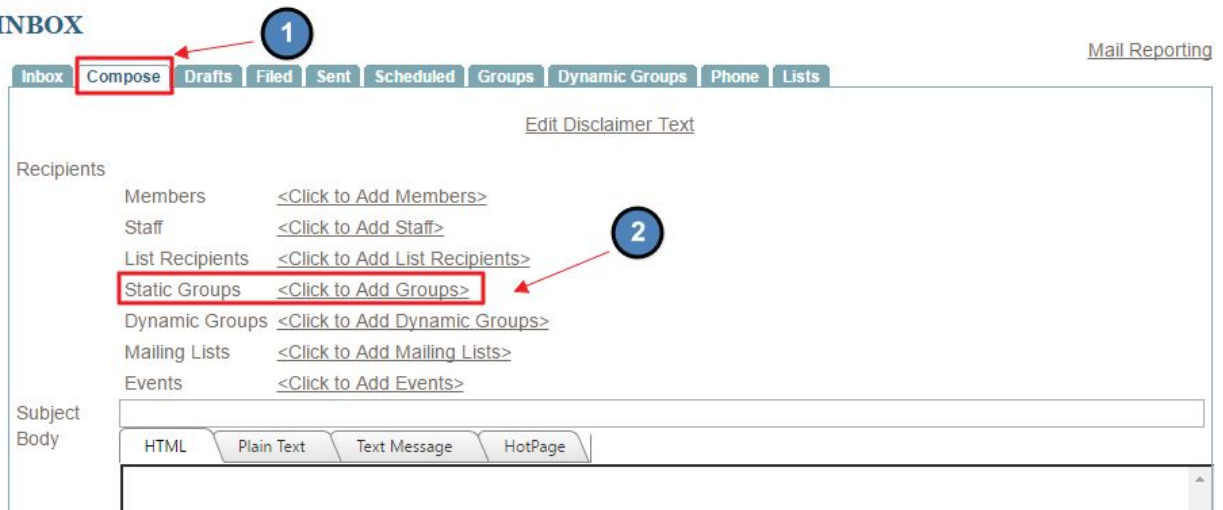
This will bring up the **Select Groups** Interface.

Select Groups   ⊠

Update Groups

Available Static Groups ▼ | Selected Static Groups
Birthday Cake | *No Results Found*
Board of Directors
Board of Directors
Bridge Club
Bridge Ladies
car club
chris' group
Cigar Group

Scroll to find the desired **Static Group** and **click** the **Static Group** name to move to the **selected groups box.**

Select Groups   ⊠

Update Groups

Available Static Groups ▼ | **Selected Static Groups**
Birthday Cake | *No Results Found*
Board of Directors   ①
Board of Directors
Bridge Club
Bridge Ladies
car club
chris' group
Cigar Group

Click Update Groups, to then begin composing the email.

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Dynamic Groups

Dynamic Groups Interface

The **Dynamic Group Toolbar** allows for several options:

Add New Group

Save
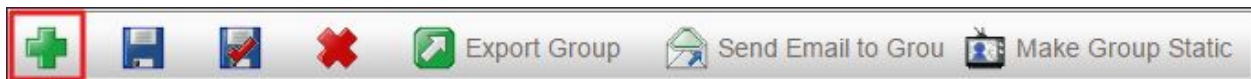
Save and Close
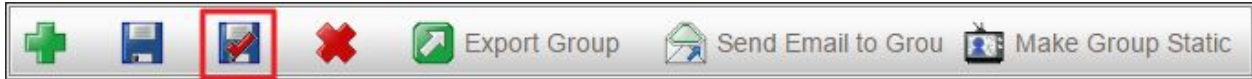
Close Out
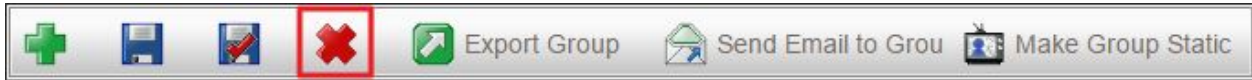
Export Group: this will allow us to export group information in a new window, or export to CSV.

Send Email to Group: this will take us to the **Compose Email Interface** to email a specific **Dynamic Group.**

Make Group Static: mostly used by Clubessential to create special groups for page permissions.
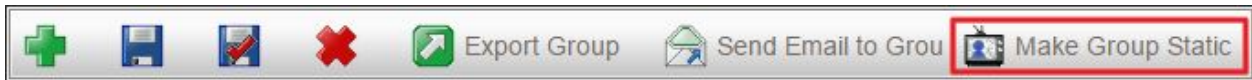
Group Explorer: is where all of the groups are housed.

Available Fields: is where options for creating group rules are located.

Adding Dynamic Groups

To add a new **Dynamic Group,** click the **Add Group Button (Green Plus Sign).**

Add a **Name** for your Group. Note: this should be detailed to what type of members are in this group (ex: Male Golf Members).

Next, **click Save and Close.**

Click the **Group Explorer tab.**

Scroll to find the group, and then drag the group to the center of the **Dynamic Group Interface.**
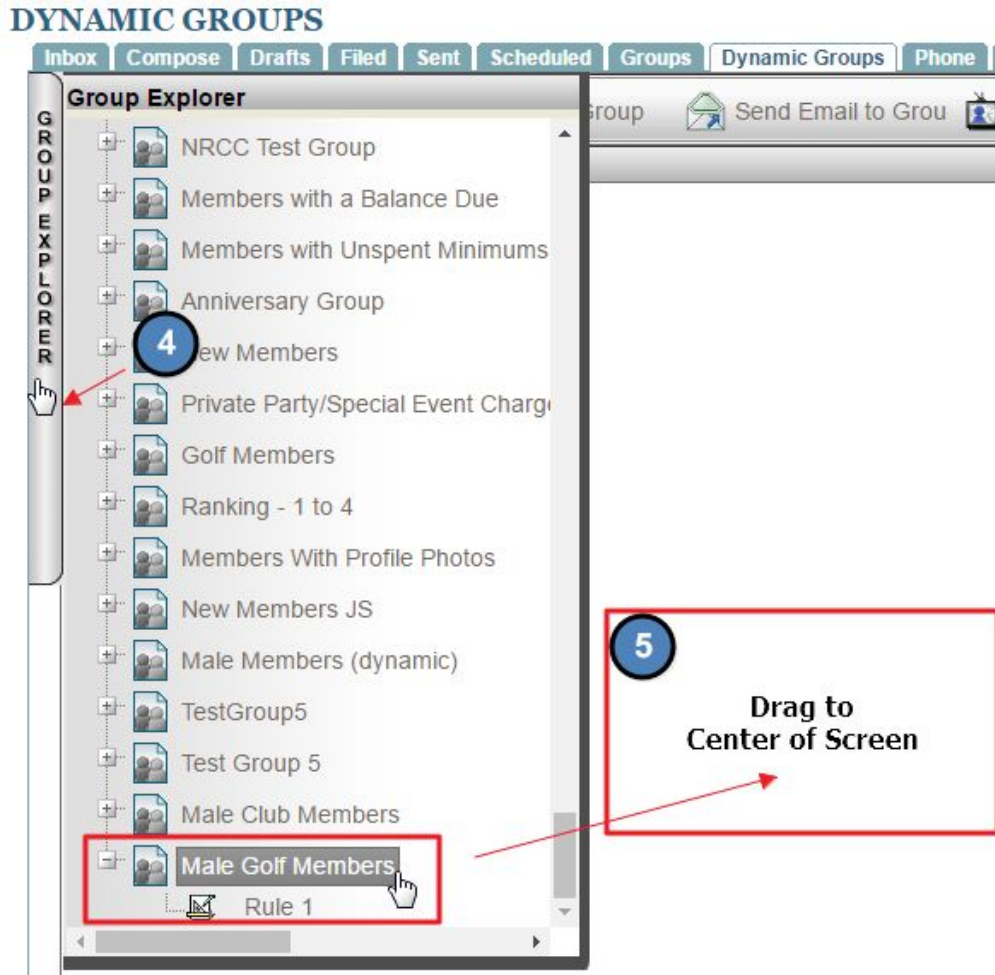
Next, open the **Available Fields** tab by clicking on it, which will list all applicable areas from the **Directory** and **accounting system.**
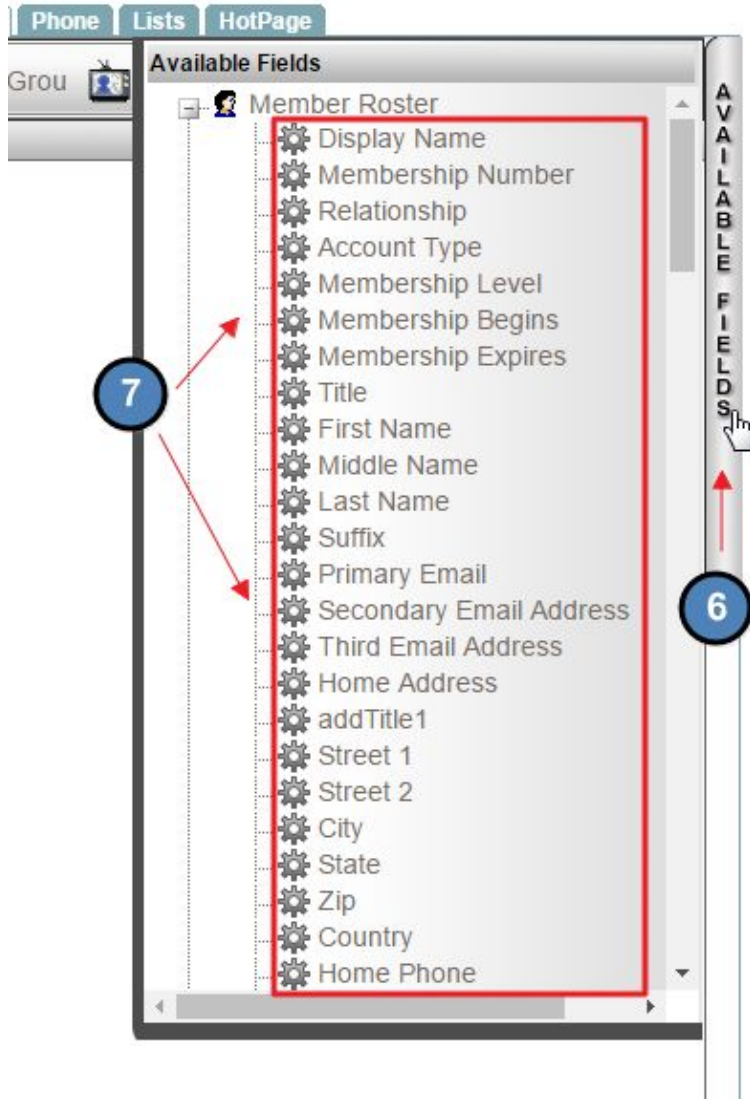
Choose the appropriate rules needed by dragging them to the center of the interface. Once all rules are added your screen should display the rules in the center of the **Dynamic Group Interface.**
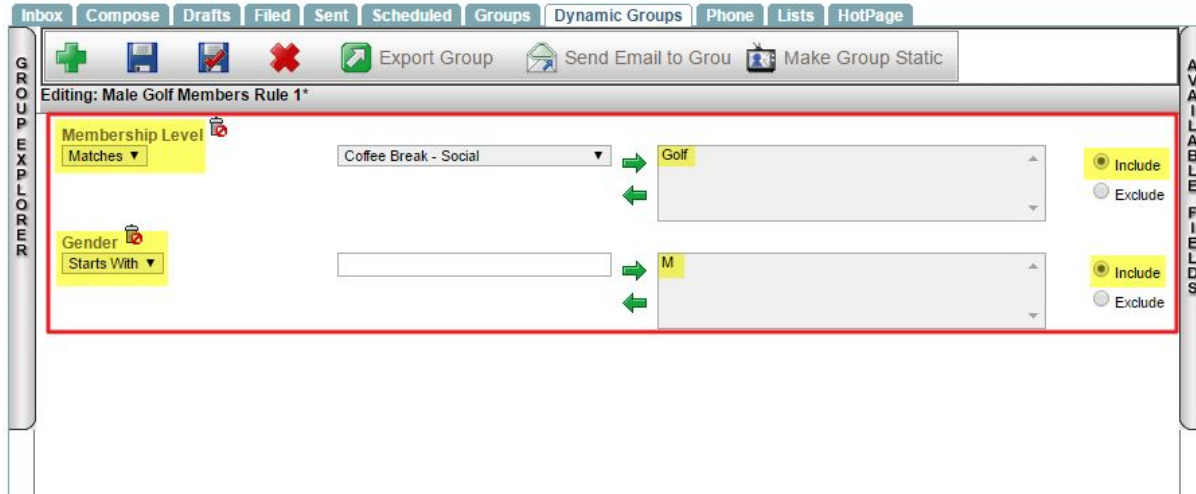
Once all rules have been added, **click the Save** button and then **Export Group** to verify the right members were added.

.
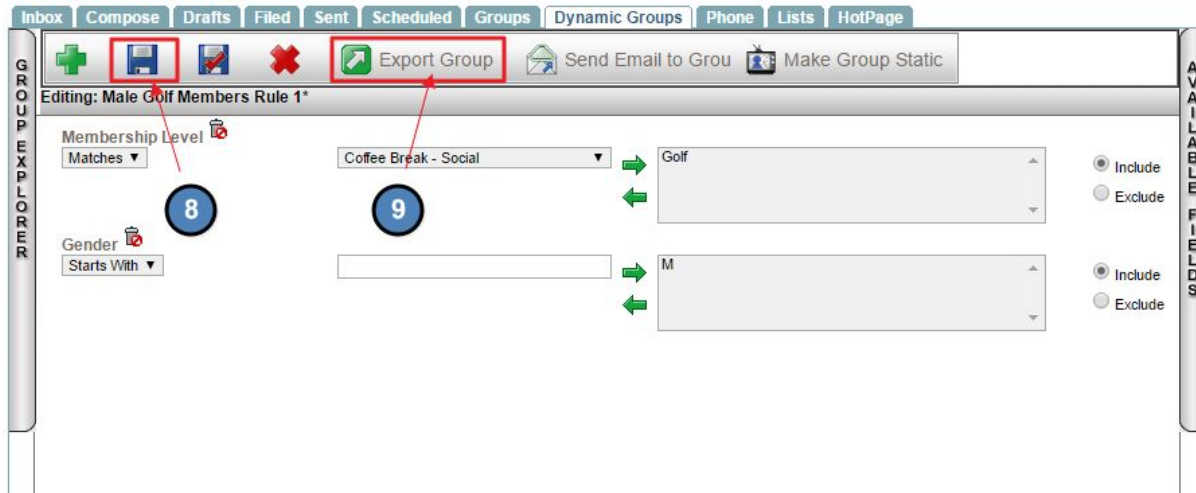
This will take you to the **Export Group Interface.**
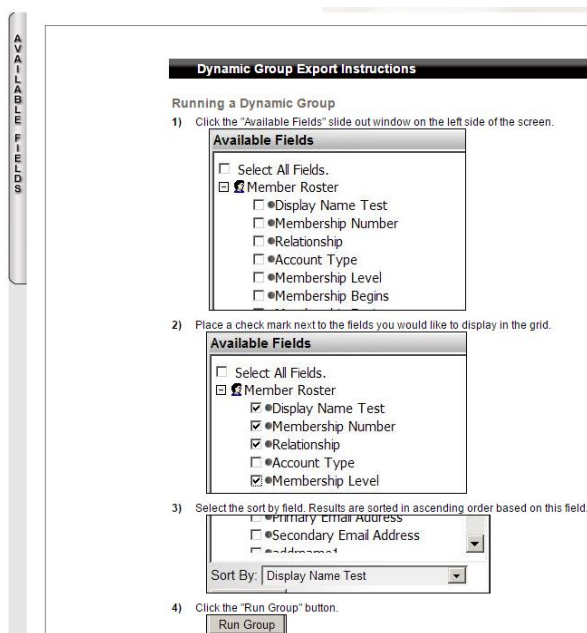
Click Available Fields, to choose which fields to export. (Ex: first name, last name, member number, membership type). Then choose **Run** or **Export.**
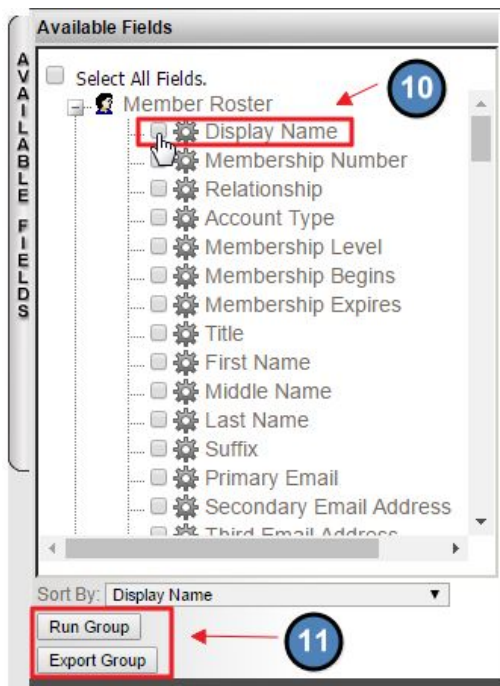
- **Run** will allow you to review the results in the browser.
- **Export to CSV** will create a CSV export. This is especially useful for off-site data entry or tracking.

Once you've obtained the proper reporting, **click the back button** to return to the **Dynamic Group Interface.**

Emailing Dynamic Groups

Emails can be sent to **Dynamic Groups** in two ways, either from the **Dynamic Groups** tab or by using the **Compose Email** interface.

To send from the **Dynamic Groups** tab, **click** on the group name in the **Dynamic Groups** tab and **drag to the center** of the screen.
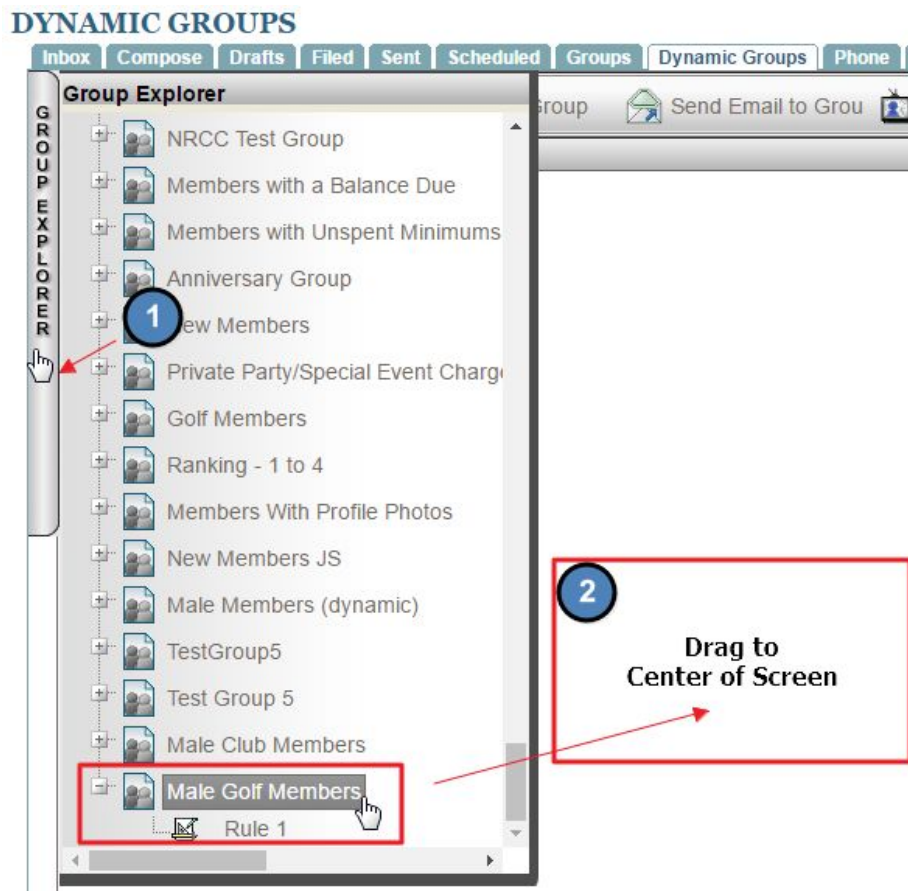
Next, click on the **Send Email to Group** button.

This will bring you to the **Compose Email Interface** where you may compose your email.

To send from the **Compose Email**, go to the **Compose Email Interface.**

Click Add Dynamic Groups link.
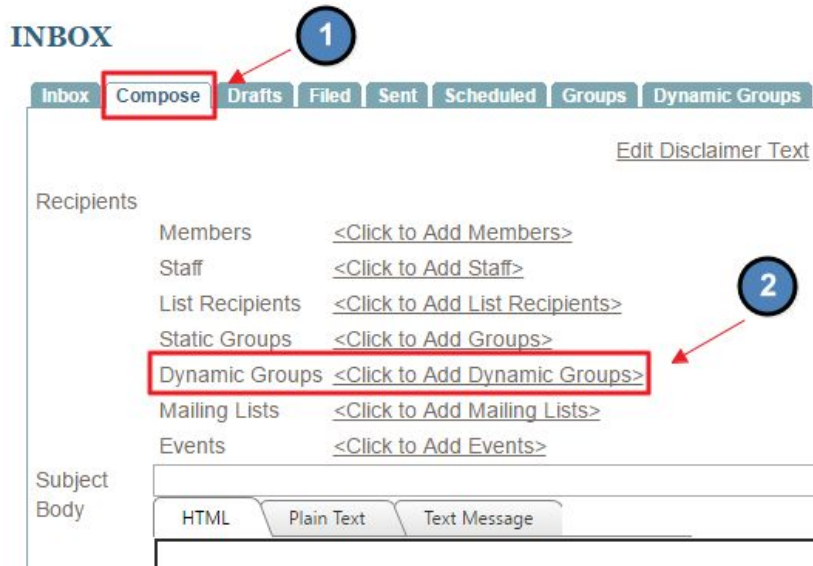
Scroll to find the desired **Dynamic Group** and **click** the **Dynamic Group** name in the **Available Dynamic Groups** column to move Group to the **Selected Dynamic Groups box.**

Click Update Groups, to then begin composing the email.

Best Practices
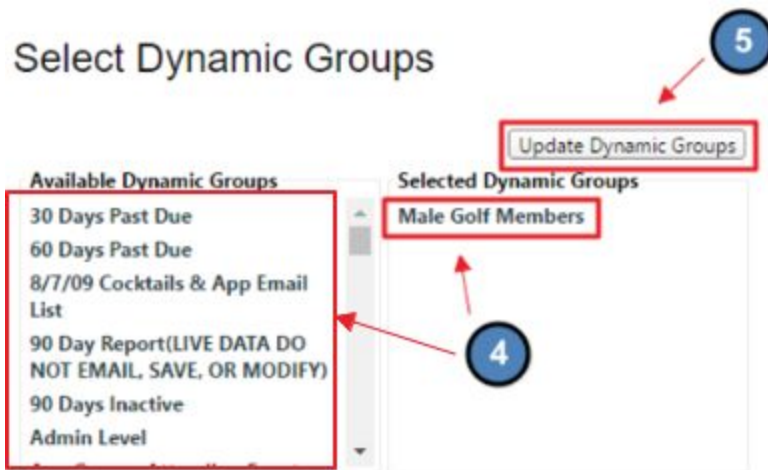
1. By using **Dynamic and Static Groups**, effective **target marketing** via the **Blast Email System** can be achieved. The more groups available, the easier it will be to ensure that the right people receive the right message. This should also increase email open rates as users are not bombarded with messages that are not relevant to their interests.

2. **Special Dynamic Groups** may need to be set up to create certain recurring emails. For instance, if you're looking to create a group that pulls members between the ages of 35-45 years of age, this is a **Special Dynamic Group** that must be set up by Clubessential.

3. Want to send out various Newsletters to your membership? Create a **Static Group** that is an **Opt-In Group** so members have the choice of receiving the communication. Don't forget to Cross Market on your Newsletter as members may have varying interests.

4. Trying to target members who bought a particular beverage or food item? This can easily be done using **Dynamic Groups** since rules are based upon information from the **Accounting System** and the **Directory.** By creating a group of members who purchase a particular beverage or food item, you can then target that group again for specials or certain events based on their purchasing choice.