



Email Basics - Composing & Sending

2016 - Winter Edition

User Guide - Table of Contents

[Overview](#)

[Use Case\(s\)](#)

[Accessing the Tool](#)

[Create an Email](#)

[Create Message from Template](#)

[Choose Recipients](#)

[Add Subject](#)

[Email Settings/Preview](#)

[Email Delivery Options](#)

[Common Questions and Concerns](#)

[Best Practices](#)

Overview

Email is the most cost effective and efficient method for communicating with your membership. The Clubessential Email System complements and supports the powerful website tools, making it easy to engage with members quickly.

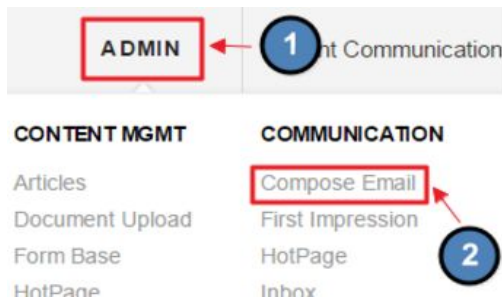
Use Case(s)

Through email, we can provide a snapshot of upcoming events or alert members of important news. It is best to provide short emails that drive members back to the website to increase website participation. Emails can also be targeted to specific members by using Static and Dynamic Groups to ensure the message is sent to the right audience.

Accessing the Tool

To access the email creation tools, follow the steps below depending on your access role.

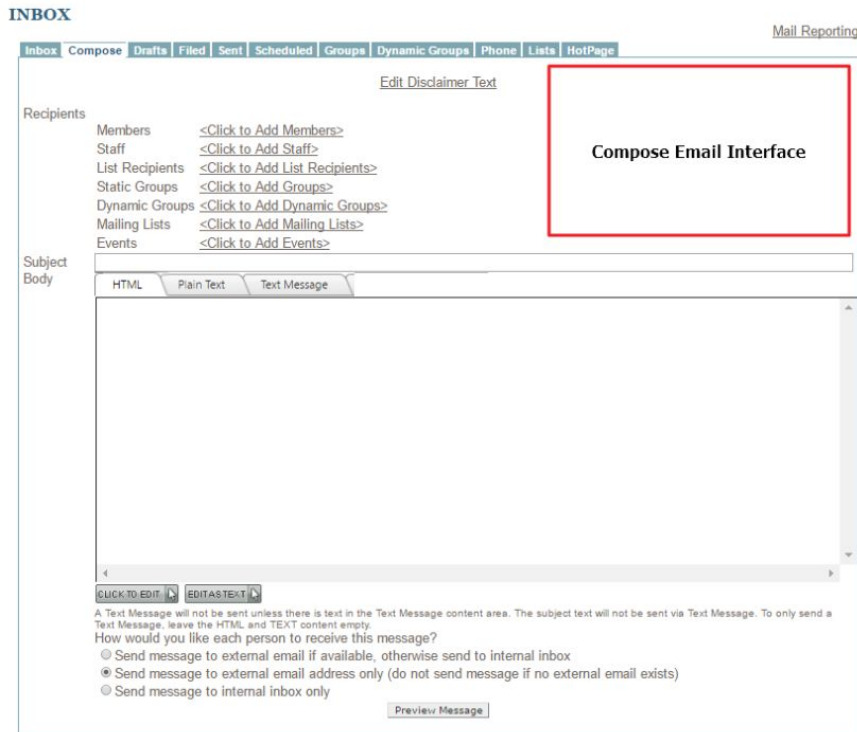
Admins: Hover over **Admin** bar in the left hand corner of the screen, select **Compose Email**.



Editors: Hover over **Admin** in the main navigation, select **Main Tools**, and then **Inbox/Groups**.

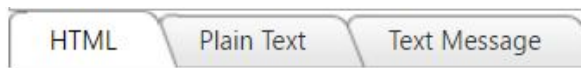


The following Email interface screen will launch.



Email Tab Overview

In the middle of the above screen, the following tabs appear.



- The **HTML** tab is for setting up the email that will display using HTML
- The **Plain Text** tab is for email services that do not read HTML
- **Text Message** is used for sending out text message alerts

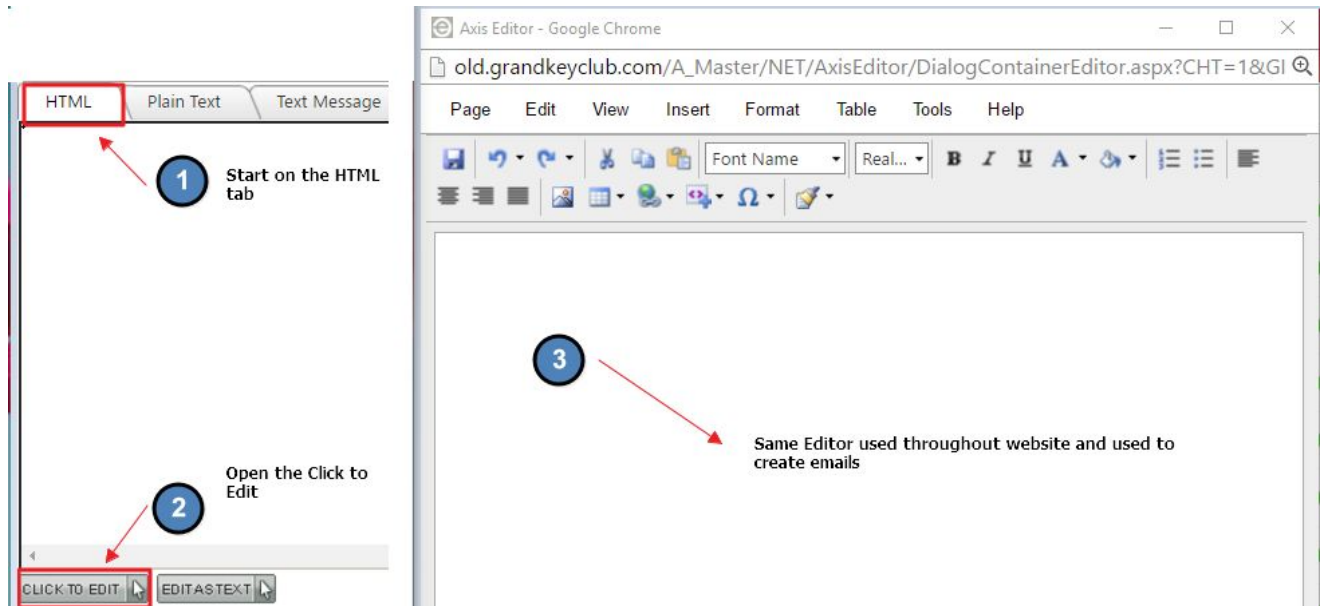
This document will focus on the **HTML** tab.

Create an Email

Emails can be created using email templates that were designed based upon your website look. You may also create your own templates to use as well. Using templates allows for quick editing, along with reinforcing your brand identity.

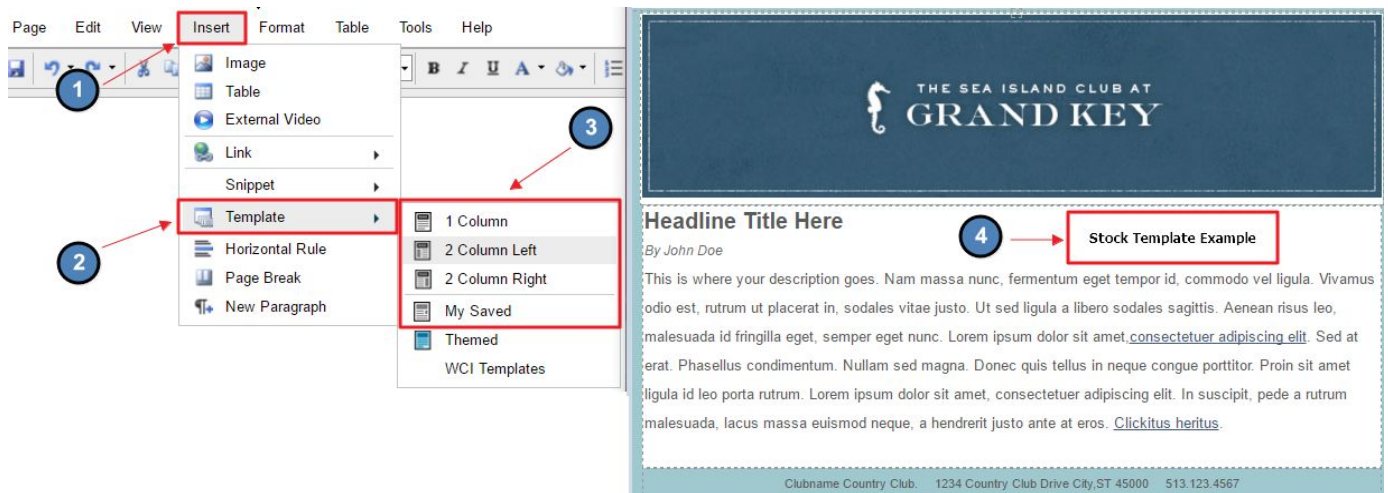
Create Message from Template

To create a new HTML message, select the **click to edit** button under the **HTML** tab, which will open the **Editor**.



Next, select **Insert**, then **Template**. Then, choose between a 1 column or 2 column template. (Note: Further Template options may be available under the **My Saved** option depending on whether previous templates have been saved).

Once selected, a Stock (Generic) Template will open.



Delete the stock information on the template and type in your communication.

5 Highlight and delete stock text


By John Doe

This is where your description goes. Nam [massa nunc](#), [fermentum eget tempor id](#), [commodo vel ligula](#). [Vivamus odio est](#), [rutrum ut placerat in](#), [sodales vitae justo](#). [Ut sed ligula a libero sodales sagittis](#). [Aenean risus leo](#), [malesuada id fringilla eget](#), [semper eget nunc](#). [Lorem ipsum dolor sit amet consectetur adipiscing elit](#). [Sed at erat](#). [Phasellus condimentum](#). [Nullam sed magna](#). [Donec quis tellus in neque congue porttitor](#). [Proin sit amet ligula id leo porta rutrum](#). [Lorem ipsum dolor sit amet](#), [consectetur adipiscing elit](#). [In suscipit](#), [pede a rutrum malesuada](#), [lacus massa euismod neque](#), [a hendrerit justo ante at eros](#). [Clickitus heritus](#).

If copying text from another source, remember to use the **Paste as Plain Text** function to strip outside formatting.



Add imagery and hyperlinks throughout to enrich the communication while driving members back to the website.



6 Type in text, add hyperlinks, and imagery

By Grand Key Club

We would like to congratulate our Fall Tournament Winners on another outstanding game!

Mary Johnson

Paul [Castigano](#)

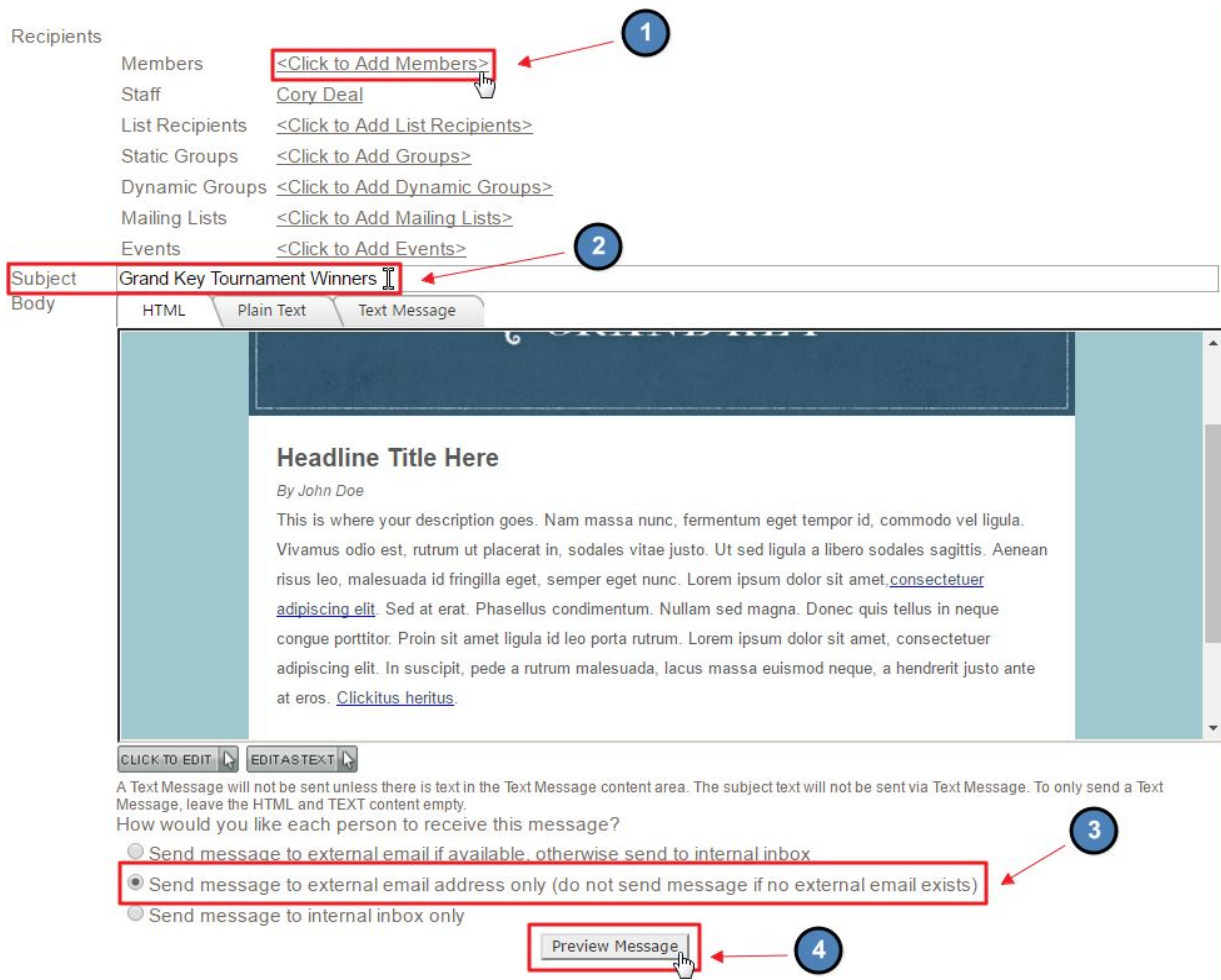
Heidi [Riddler](#)

Please join us for our next Tournament, and [sign up here!](#)

Once message is complete, click **Save** to return to the main template.

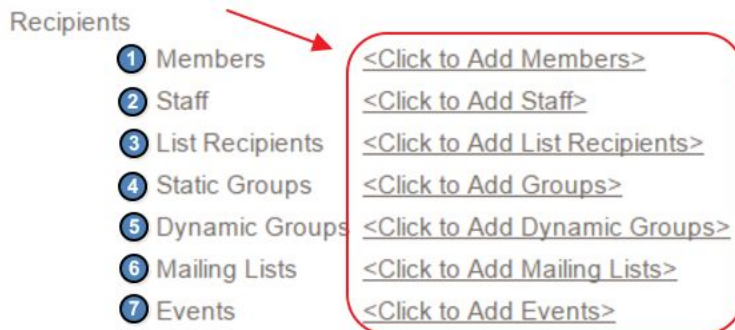


The following screen will open where Recipients can be added, Subject line populated, settings defined, and message previewed.



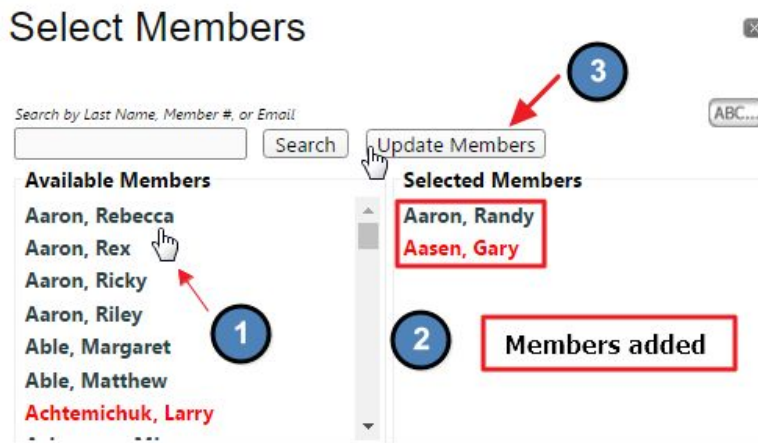
Choose Recipients

Choose the recipients of the email, by clicking on the desired method to assign recipients.



- **Members:** Select members individually to receive messages.
- **Staff:** Select Staff/Employees individually to receive messages.
- **List Recipients:** Not used
- **Static Groups:** Send to specific Static (fixed Member) groups
 - All Members: all members active in the directory
 - All Staff: all staff active in the directory
- **Dynamic Groups:** send to specific Dynamic (fluctuate based on defined criteria) groups.
- **Mailing Lists:** Not used
- **Events:** Attendees from a specific event

For example, to select **Members**, click on the **Available Members** name from the listing on the left. Member(s) will be added to the **Selected Members** column on the right. Click **Update Members** to add the selected Members to the Recipient list and return to the email.



Add Subject

Next, add a subject to your message. Target the subject so it is clear what the message entails. Use your Club's name so Members recognize the email. Avoid caution words such as "money" that email services can flag as spam, and prevent delivery to your Members.

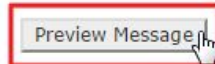
Subject

Email Settings/Preview

Use default and recommended **Send to External Email Address** option designated below. (Note: Other options are tied to older versions of the software, and are not recommended).

Click **Preview Message** to review message prior to sending.

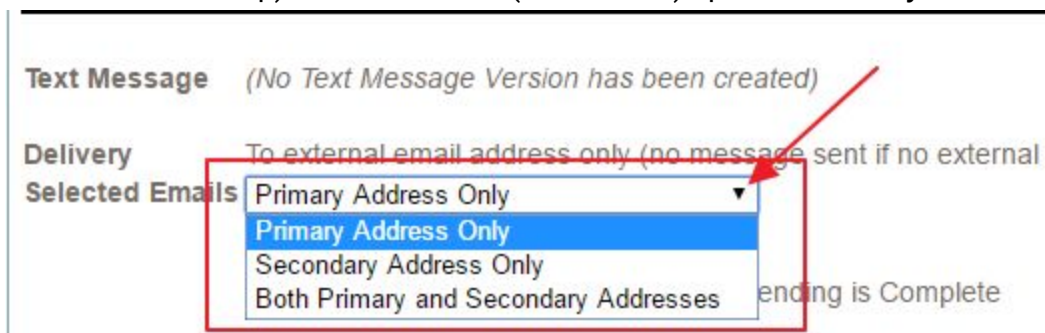
- Send message to external email if available, otherwise send to internal inbox
- Send message to external email address only (do not send message if no external email exists)
- Send message to internal inbox only



Email Delivery Options

Once reviewed, the message can be either sent or saved for later sending. Additional options also exist to assist with tracking.

First, designate whether to use Primary Addresses, Secondary Addresses, or Both (as defined in the Member setup). Most common (and Default) option is **Primary Address Only**.



Next designate whether to **Track the Message** (for viewing/delivery statistics), and whether you would like to receive a **notification email** when sending is complete.



Finally, choose from the following options to define next steps.

Delivery To external email address only (no message sent if no external email address).

Selected Emails Primary Address Only

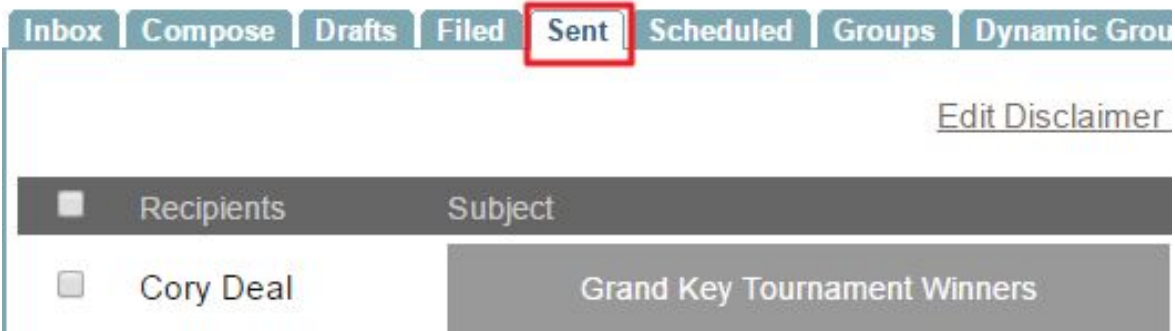
Track This Message?

Send Me a Notification Email When Sending is Complete

Send Message Now Save Changes Send A Test Make Changes Schedule For Later

1 2 3 4 5

- **Send Message Now** - Sends the message. After sent, it will show in the Sent tab.



Recipients	Subject
<input type="checkbox"/> Cory Deal	Grand Key Tournament Winners

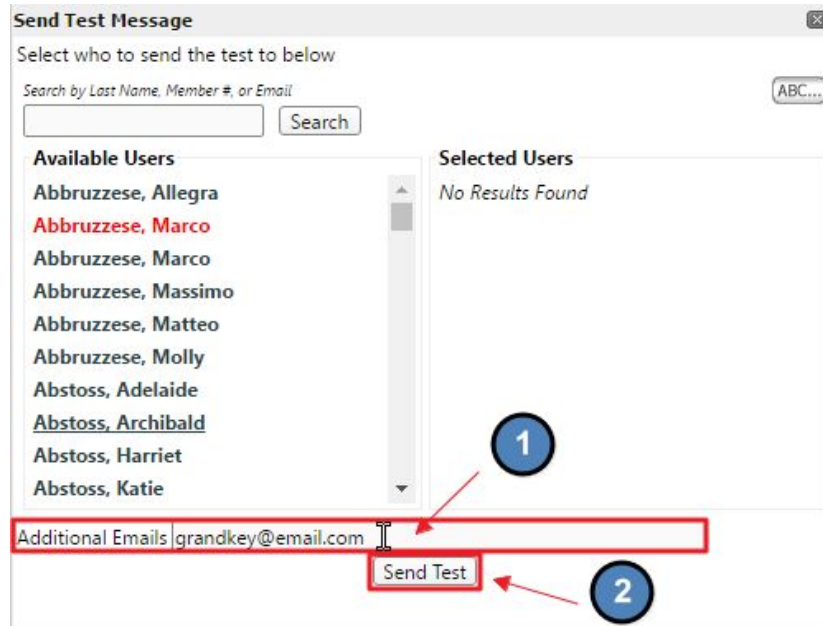
- **Save Changes** - This will place the message in drafts to revisit later.

INBOX



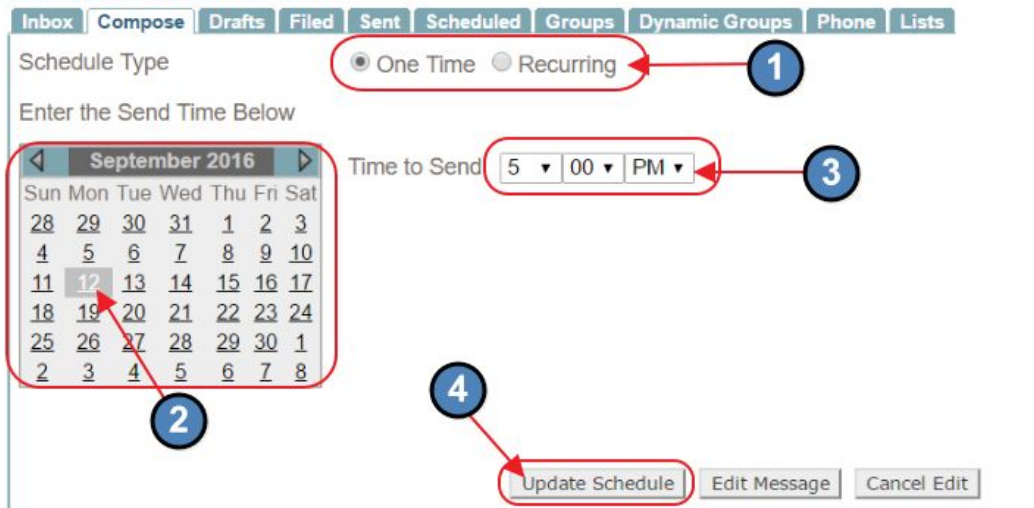
Message Subject	Grand Key Tournament Winners
<input type="checkbox"/> User Drafts	Grand Key Tournament Winners

- **Send a Test** - This will send a test to a desired email. Select an Available User, or enter an additional email (that can be from outside the system) to test the email as highlighted below.



- **Make Changes** - Takes you back to the first screen for further editing (composing).
- **Schedule for Later** - Allows set-up to send the message at a later date and time, and/or to set-up recurring emails. Designate whether the email will be sent once, or will be recurring. Then, specify date and time to send. Click **Update Schedule** to save and exit.

EMAIL SCHEDULING



Common Questions and Concerns

What is the best way to see how my email looks before sending?

Send yourself a **test email** prior to sending the email to everyone on the recipient list.

Best Practices

1. When creating a subject for your email, it is best to keep the subject short and direct. The better you can inform your audience of the email content in an enticing email, the better chances of open rate. Never use suggestive titles that refer to money as this may cause email providers to flag the message as spam.
2. It is best to keep the email content short and direct, just like the subject. Have the information be easily accessible and quick to read. For more lengthy passages, drive your audience back to the website for further reading material. Driving members back to the website will also increase their site usability and it allows for them to see alternate communications.
3. Adding links and imagery in your email enhances the overall aesthetic, reinforces your message, and encourages members back to the websites. If you're promoting an event for instance, include an image that helps to complete your message. Add a few sentences marketing why your members should attend the event. Make sure to link back to the event on the calendar so members can either read more information, or sign up for the event.
4. Have you ever received unwanted emails that just don't seem to apply to you? Combat bombarding all members with communications that may not be relevant by increasing your Static and Dynamic Groups on the website. Through Static and Dynamic Group, we can create various user groups to send email communication to that is relevant to your members based on their interests, member type, or event past event attendance.
5. Emails can take time to create, and sending one out last minute can result in errors in the email. Take the time to create emails ahead of time and use the Schedule for Later option to send emails at a later date.
6. Practice makes perfect, which is why the Blast Email system allows for a test to be sent. Always test your email so you can see how this will come through on various email systems. Review the email like a member would, and be sure to test all links.