



Creating Group Mail with Ease Webinar

November 4, 2020



Clubessential Client Resource Center

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Ask a Question at Any Time!

Questions will be addressed at the end of this webinar as time permits. If we are unable to address your question during today's webinar, we will follow-up with you offline and ensure you have the information you need.

At the end of this Webinar, you will be prompted with a brief post-training survey. We highly encourage you to give us your feedback so we can improve.



Kim Saunders
Clubessential Education
Specialist



Jen Montano
Clubessential Education
Specialist



Agenda



1. Why Group Mail is Vital to Your Club
2. End of Life for Clubessential Legacy Email Editor
3. How to Begin Composing an Email
4. Exploring the Template Manager
5. Creating an Email From Scratch Using the Email Editor Drag-and-Drop Content Interface
6. Previewing & Saving Your Emails
7. Accessing Your Draft Emails
8. Creating an Email From a Template
9. Additional Email Features
10. Questions & Answers

Why is Group Mail Vital to Your Club?

Engage and Connect through Communication

- Engage both current and potential members
- Market to targeted audiences
- Streamline your business processes
- Meet your members where they are
- Provide instantaneous communication
- Drive more traffic to your Club site
- Improve sales and increase brand awareness



GRAND KEY CLUB



Like your home, away from home



Event/Article

Lorem ipsum dolor sit amet,
consectetur adipiscing elit. Aenean



Event/Article

Lorem ipsum dolor sit amet,
consectetur adipiscing elit. Aenean

CONTENT

ROWS

SETTINGS

T

TEXT

IMAGE

BUTTON

DIVIDER

SOCIAL

HTML

VIDEO

ICONS

MENU

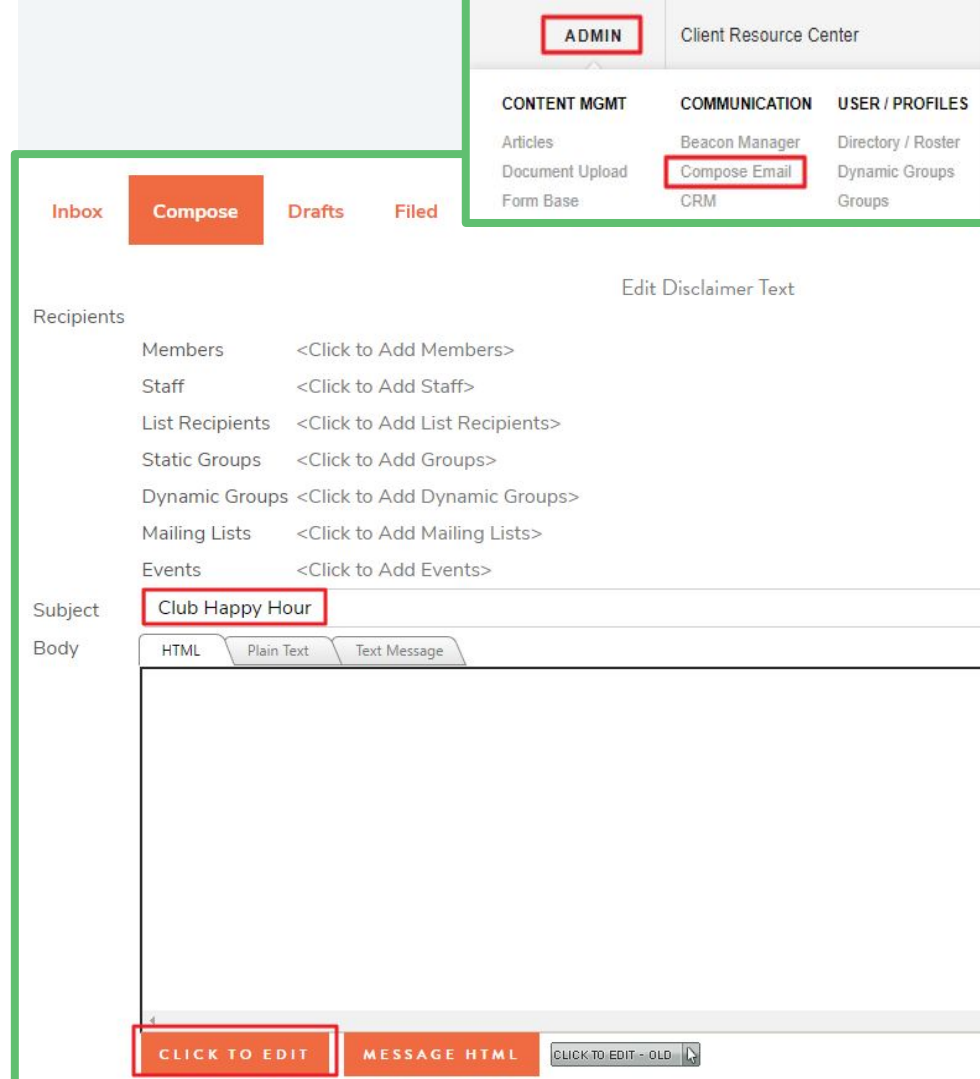


Out with the old... In with the New

Given that our new Email Editor offers robust functionality and is best in class for designing mobile-responsive emails, our new Email Editor will soon become our only Email Editor.

Composing an Email

- From the Admin bar, select Compose Email
- Enter a Subject for your email
- Select **Click to Edit** to open the Template Manager



The screenshot shows the email composition interface. At the top right, the 'ADMIN' button is highlighted with a red box. Below it, the 'COMMUNICATION' menu is open, and the 'Compose Email' option is highlighted with a red box. The 'Compose' button in the top navigation bar is also highlighted with a red box. The 'Subject' field contains the text 'Club Happy Hour' and is highlighted with a red box. At the bottom, the 'CLICK TO EDIT' button is highlighted with a red box, and the 'MESSAGE HTML' button is highlighted with a red box. The 'CLICK TO EDIT - OLD' button is also visible.

Client Resource Center

ADMIN

CONTENT MGMT COMMUNICATION USER / PROFILES

Articles Beacon Manager Directory / Roster

Document Upload **Compose Email** Dynamic Groups

Form Base CRM Groups

Inbox **Compose** Drafts Filed

Edit Disclaimer Text

Recipients

Members <Click to Add Members>

Staff <Click to Add Staff>

List Recipients <Click to Add List Recipients>

Static Groups <Click to Add Groups>

Dynamic Groups <Click to Add Dynamic Groups>

Mailing Lists <Click to Add Mailing Lists>

Events <Click to Add Events>

Subject **Club Happy Hour**

Body HTML Plain Text Text Message

CLICK TO EDIT MESSAGE HTML CLICK TO EDIT - OLD

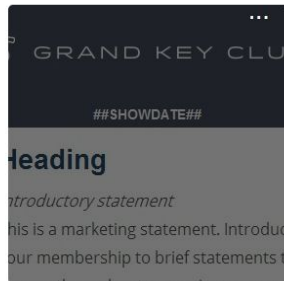
Template Manager

- A repository for all your email templates
- Allows you to Save and Categorize your templates
- Includes four separate template categories:
 - Branded
 - Themes
 - Saved
 - AutoSaves

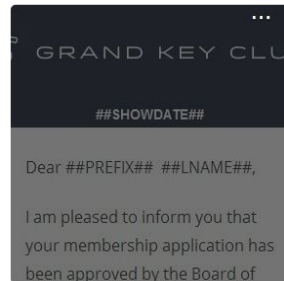
Get Started

Create New

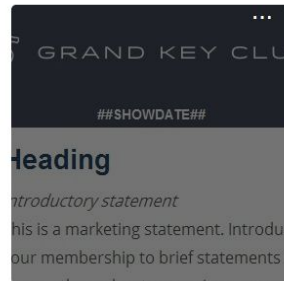
Branded Themes Saved AutoSaves



Branded - 1 Column



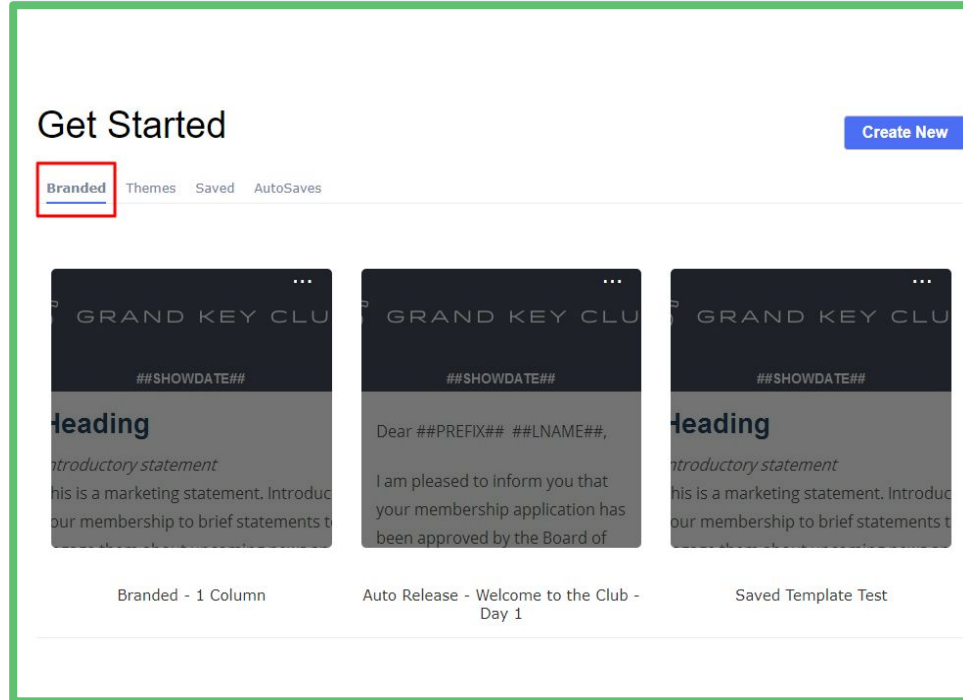
Auto Release - Welcome to the Club - Day 1



Saved Template Test

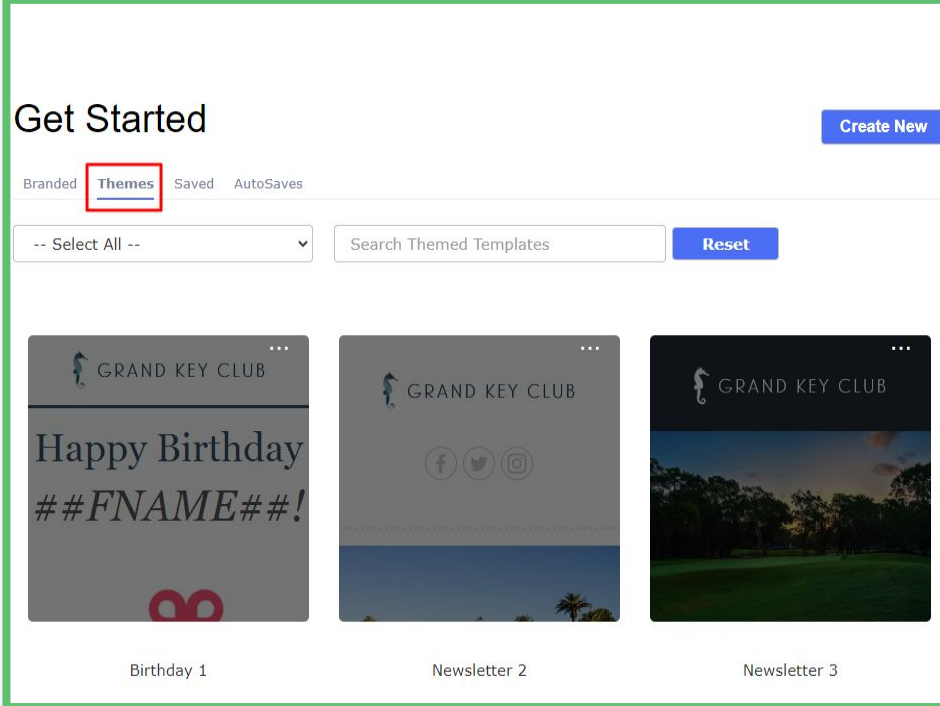
Branded Templates

- A library of Club branded custom templates created by Clubessential just for your Club
- Branded Templates have been branded out to match your Club's site design and logo
- Clicking on a Branded Template will launch the Email Editor where you can begin composing your email using the Branded Template as a starting point



Themes Templates

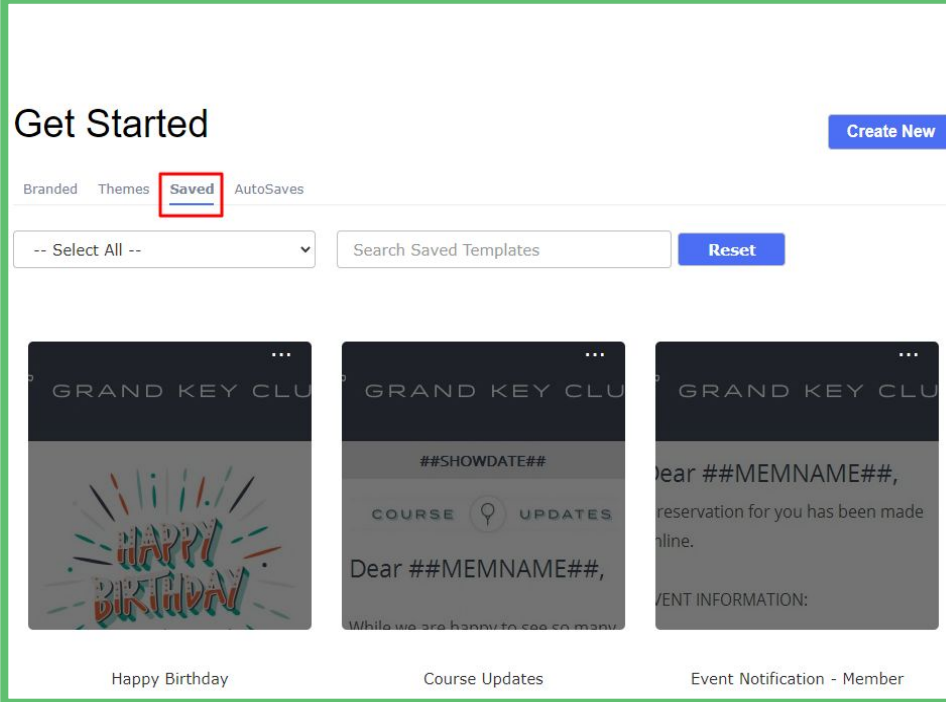
- A library of Themed Templates that Clubessential provides to all Clubs
- Various theme categories include:
 - Birthdays
 - Events
 - Holidays
 - Newsletters
 - Webinars
 - Welcome Emails
 - AutoSaves
- Clicking on a Themes Templates will launch the Email Editor where you can begin composing your email using the Themes Template as a starting point



The screenshot shows the 'Get Started' page for selecting a theme. At the top right is a blue 'Create New' button. Below the title are tabs for 'Branded', 'Themes' (highlighted with a red box), 'Saved', and 'AutoSaves'. A dropdown menu shows '-- Select All --' and a search bar contains 'Search Themed Templates' with a blue 'Reset' button to its right. Three theme cards are displayed: 'Birthday 1' with a grey background and red ribbon, 'Newsletter 2' with a grey background and social media icons, and 'Newsletter 3' with a dark background and a golf course image.

Saved Templates

- A library of all your Club's created and saved templates
- Modify or rebrand a Branded or Themes Template and save it here for future use
- Create and maintain categories for your Saved Templates
- Delete Saved Templates that are no longer needed



Get Started [Create New](#)

Branded Themes **Saved** AutoSaves

-- Select All -- Search Saved Templates [Reset](#)

GRAND KEY CLUB

HAPPY BIRTHDAY

Happy Birthday

GRAND KEY CLUB

##SHOWDATE##

COURSE UPDATES

Dear ##MEMNAME##,

While we are happy to see so many

Course Updates

GRAND KEY CLUB

Dear ##MEMNAME##,

reservation for you has been made online.

EVENT INFORMATION:

Event Notification - Member

AutoSaves

- A log containing snapshots of your work
- Snapshots are automatically taken every minute you are in the Email Editor constructing your email
- AutoSaves display the message “**There are no AutoSave Logs currently available**” when you are constructing a new email
- The AutoSaves log purges every 24 hours
- Serves as a short term safeguard giving you the ability to return to previous versions of your work if needed

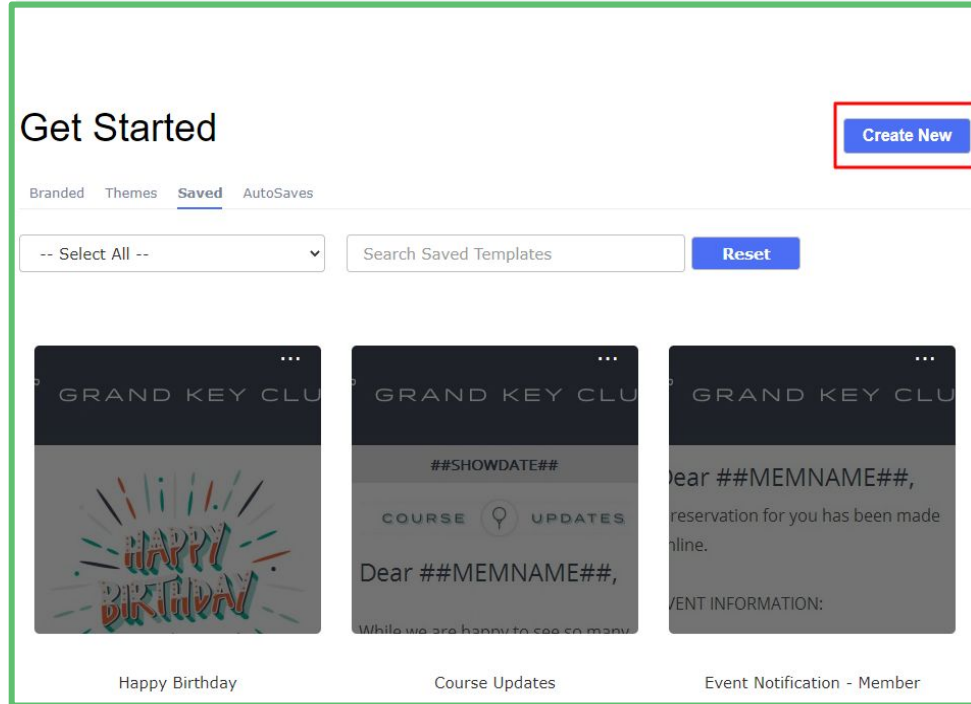
Get Started

Branded Themes Saved **AutoSaves**

09/01/2020 3:17 PM	Open
09/01/2020 3:16 PM	Open
09/01/2020 3:15 PM	Open
09/01/2020 3:14 PM	Open

Create New

- Start here when creating your emails from scratch; when you want to compose an email without using a template as a starting point
- Clicking Create New will launch the Email Editor where you can begin composing your email



Get Started

Create New

Branded Themes Saved AutoSaves

-- Select All -- Search Saved Templates Reset

GRAND KEY CLUB

HAPPY BIRTHDAY

Happy Birthday

GRAND KEY CLUB

##SHOWDATE##

COURSE UPDATES

Dear ##MEMNAME##,

While we are happy to see so many

Course Updates

GRAND KEY CLUB

Dear ##MEMNAME##,

reservation for you has been made online.

EVENT INFORMATION:

Event Notification - Member

Settings

- Content Area Width - This is the width of the email itself. Generally emails are between 500-600px
- Background Color - This is the color behind the content area.
- Content Area Background Color - The default color behind your content.
- Default Font - All text added will default to the font selected here.
- Link Color - Hyperlinks will be the color chosen.

 CONTENT

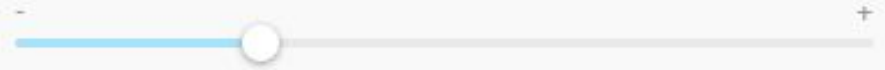
 ROWS

 SETTINGS

GENERAL OPTIONS

Content area width

600px



Background color



Content area background color

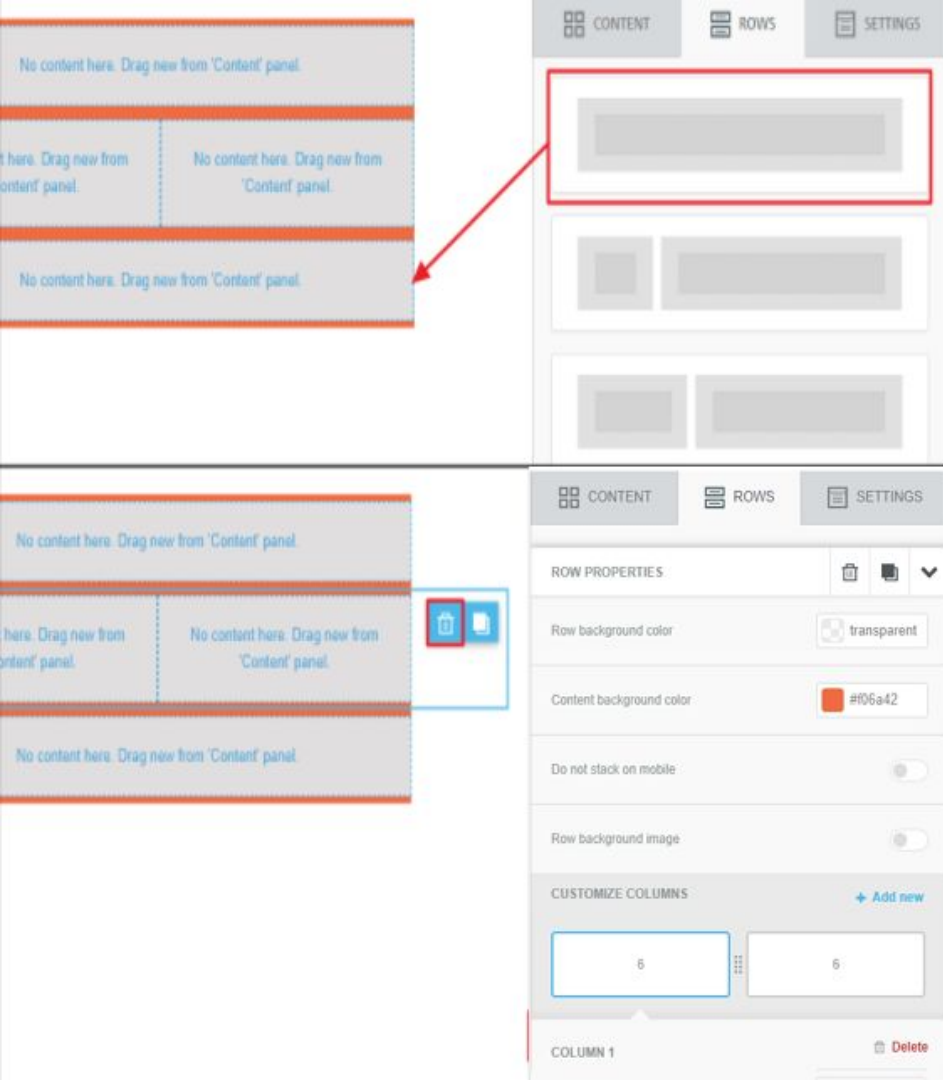


Default font



Link color





Rows

- Drag and drop rows to build your email structure.
- While a row is selected, use trashcan to delete
- Properties - On right hand side
 - Colors override the main settings. Can be changed individually for each row
 - Do not stack on mobile - Recommended to leave off. Will make email NOT mobile responsive
 - Row background image - ability to have image as background (does not work on Outlook)
- Customize Columns - Click on the different columns to bring up the Column Properties for each column. Alter the column settings individually to customize each column.



Images

- Drag and drop image block and place in desired row
- File Manager contains images used from previous emails
 - Upload - add images directly from computer
 - Import - add images from various services such as Google Drive and Dropbox
 - Search free photos - search repository of free stock images to use
- Use the search bar to search for photos
- Use Trashcan to delete any unwanted images

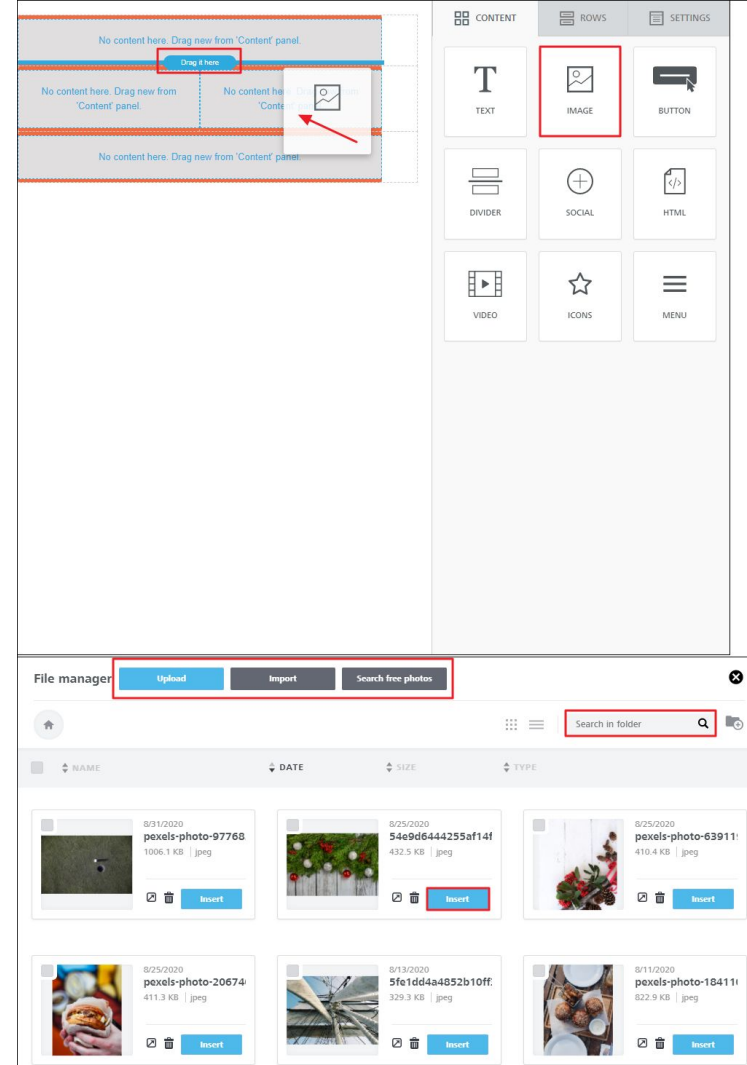
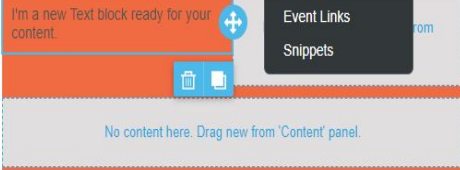
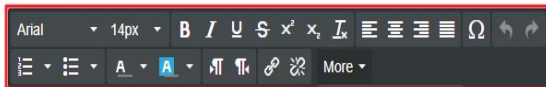


Image Settings

- Auto Width - automatically expands image to full content area. Can be turned off.
- Align - can align image to left, center, or right
- Apply effects & more - many image effects such as cropping, rounding corners, and resizing
- URL - add a URL to make an image a hyperlink (options to link to club documents and events)

The screenshot displays the Grand Key Club website editor interface. The main content area shows a logo for 'GRAND KEY CLUB' with a red background and a white logo icon. The logo is currently set to 'Auto width' and is centered. The editor interface includes a top navigation bar with 'Actions', 'Show structure', 'Help', and 'SAVE' buttons. On the right side, there is a 'CONTENT PROPERTIES' panel with various settings:

- CONTENT PROPERTIES:** Includes 'Auto width' (checked), '20%' width slider, 'Full width on mobile' (unchecked), 'Align' (center), 'Dynamic image' (unchecked), 'Change image', and 'Apply effects & more' buttons.
- URL:** Shows the URL 'https://d15k2d11r6t6rl.cloudfront.net/public/use' and the image name 'logo.png'.
- ALTERNATE TEXT:** A field for 'Alternate text'.
- ACTION:** Includes 'Image link' (set to 'Open web page') and a 'Url' field.
- BLOCK OPTIONS:** Includes 'Padding' (set to 'More options') and 'All sides' (set to '0').



CONTENT PROPERTIES

Text color Link color Line height

BLOCK OPTIONS

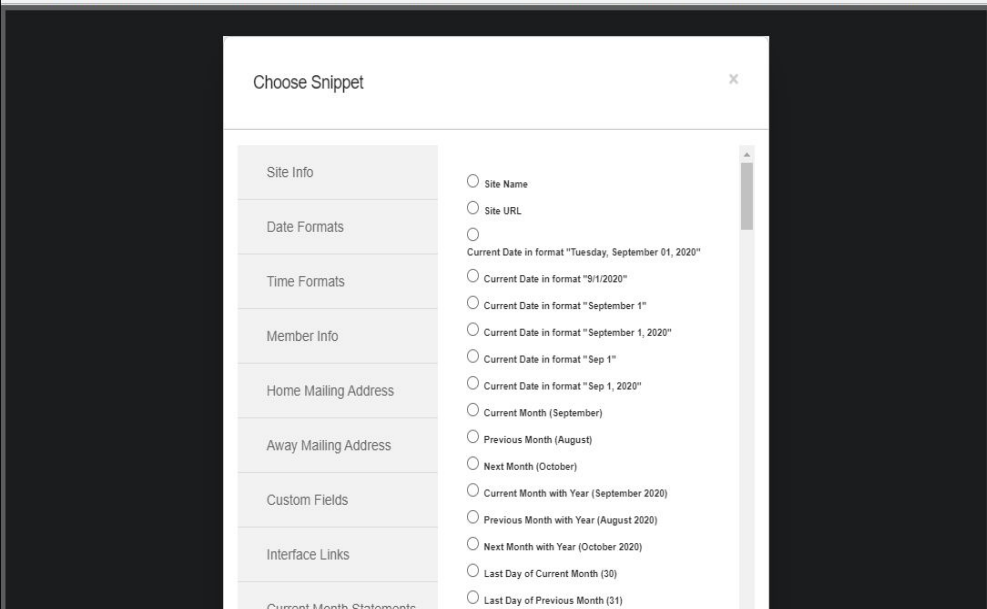
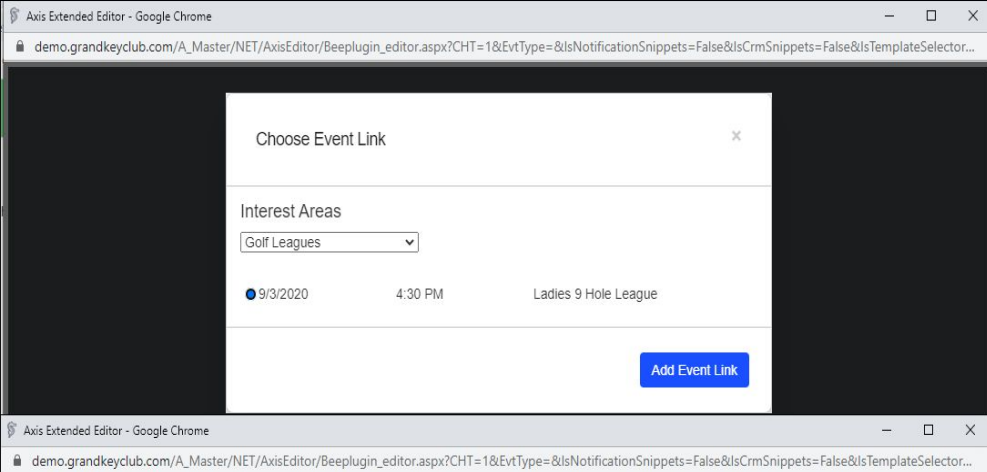
Padding More options

All sides

Hide on DESKTOP MOBILE

Text

- Drag and drop - Click into text block to add content and utilize the text settings
- Text Options - Font, Size, Color, Alignment, bullet points, and more
- Content Properties - ability to set line height and padding.
- Link color - can override email settings for specific content blocks
- More - ability to use Event Links and Snippets



Text (Advanced)

- Hyperlink - ability to link to any webpage or even email link
- Event links - Under More dropdown. Lets you easily add a hyperlink to one of your calendar events. Check event bubble next to desired event and select “Add Event Link”
- Snippets - Pull information from directory, website information, statements, event events. Under More dropdown. Select bubble next to desired snippet.

Buttons

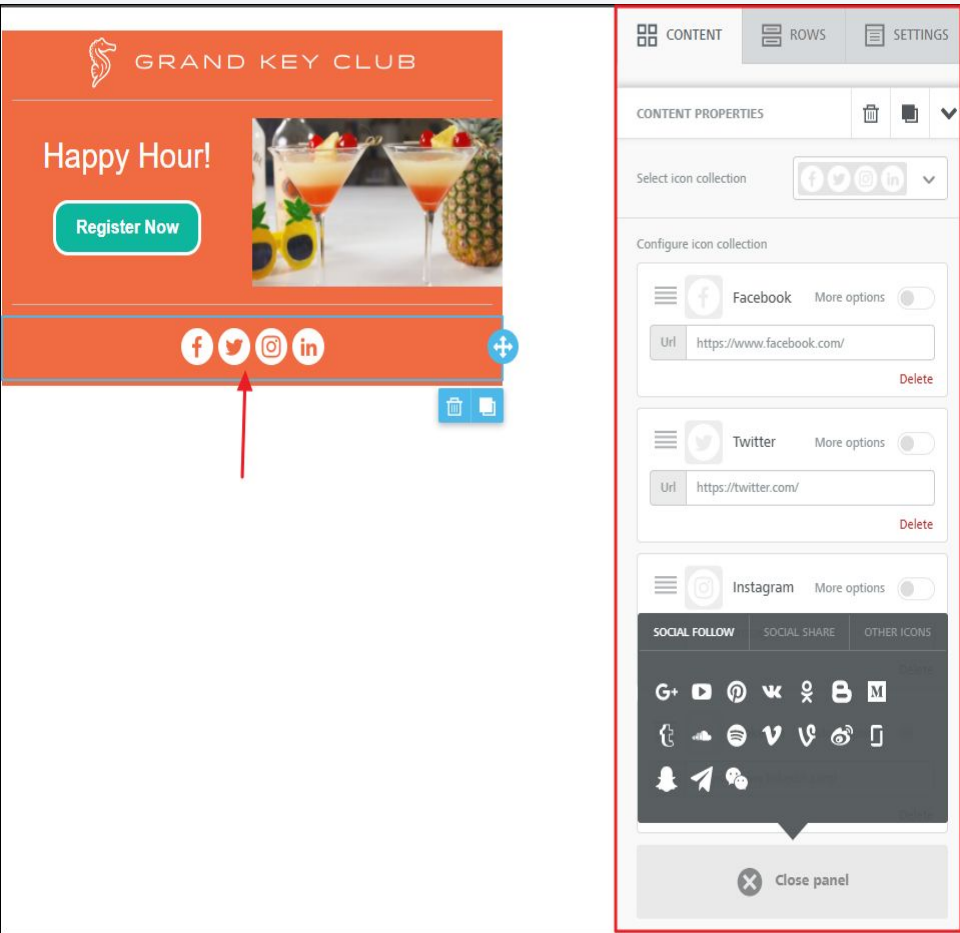
- Drag and drop button in place
- Click into button to change text and format text
- URL/Link - type in URL or select link to club document or calendar event
- Button Options:
 - Change background and text color of buttons.
 - Set height as well as alignment
- Border radius - This sets the roundness of the corners. The higher the number, the more round the button.

The screenshot displays the Axis Extended Editor interface for editing a website template. The main workspace shows a preview of the 'GRAND KEY CLUB' header and a content area. A blue button with the text 'Button' is shown in its initial state. A red arrow indicates a transition to a second state where the button is green, rounded, and contains the text 'Register Now'. The right sidebar, titled 'CONTENT PROPERTIES', is expanded to show various configuration options for the button, including 'Link type' (set to 'Open web page'), 'Background color' (set to #3AAEE0), 'Text color' (set to #ffffff), 'Align' (center), 'Line height' (multiple lines), 'Border radius' (set to 4), and 'Content padding' (with 'More options' toggled on). The bottom of the sidebar shows a visual representation of the button's padding settings.

Dividers

- Drag and Drop
- Break up your email into easily recognizable sections
- Adjust the color to fit email. Can be made transparent to create a space in the email.
- Increase/Decrease thickness
- Solid, Dotted, Dashed options.

The screenshot displays a drag-and-drop email builder interface. At the top, there are navigation options: 'Show structure', 'Help', and a 'SAVE' button. The main workspace shows a preview of an email section for 'GRAND KEY CLUB'. The section has an orange background and contains the text 'Happy Hour!' and a 'Register Now' button. A divider block is being added to the top of this section, indicated by a blue plus icon and a red arrow. The settings panel on the right is titled 'CONTENT PROPERTIES' and includes options for 'Transparent', 'Line' (solid, dotted, dashed), 'Width' (100), 'Align' (left, center, right), 'BLOCK OPTIONS' (Padding, All sides), and 'Hide on' (DESKTOP, MOBILE).



Social/Icons

- Social icons allow you to link your various social pages all at once.
- Simply add the URL of your Facebook, Instagram, Twitter pages.
- Any number of Icons can be deleted.
- The icon sets and themes can be changed to best match your email.
- Many more social icons are preloaded such as Google+ and Youtube.

Show structure Help SAVE

CONTENT ROWS SETTINGS

CONTENT PROPERTIES

Video url

Add a [YouTube](#) or [Vimeo](#) URL to automatically generate a preview image. The image will link to the provided URL.

Play icon type

Play icon color

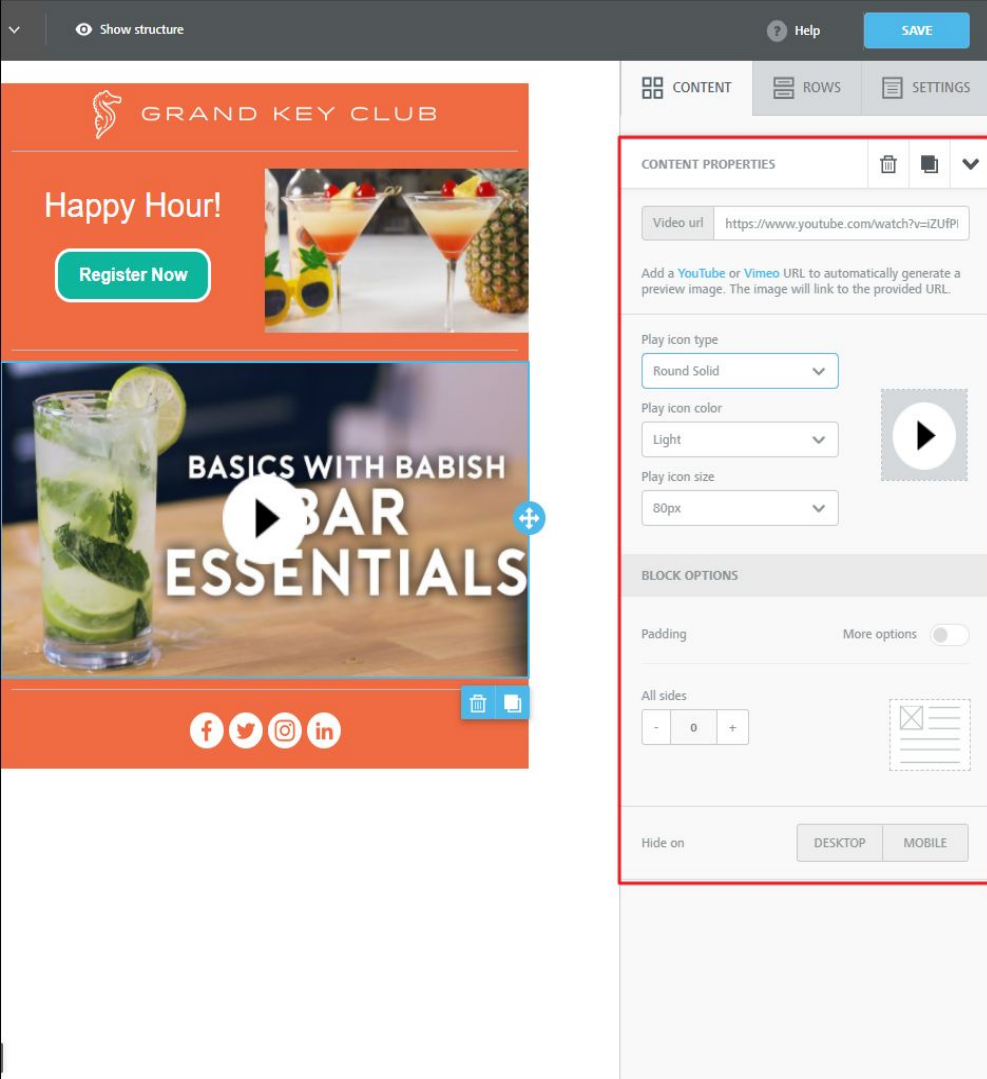
Play icon size

BLOCK OPTIONS

Padding More options

All sides

Hide on



Videos

- Easily add links to Youtube and Vimeo videos
- Copy and paste URL into field
- Video image is automatically added. The size is adjusted to the corresponding content area.
- The Icon can be adjusted to different styles, sizes, and colors.
- Videos can only be played directly in emails if the recipient is using iMail. Other email services are unable to play videos directly within the the email.



HTML

- Specifically for advanced users.
- Can use for specific sections or even the entire email.

The screenshot displays an email editor interface. At the top, there are tabs for 'CONTENT', 'ROWS', and 'SETTINGS'. Below these is a 'CONTENT PROPERTIES' section with icons for trash, copy, and a dropdown menu. The main workspace shows a preview of an email template for 'GRAND KEY CLUB'. The template has an orange header with the club logo and the text 'Happy Hour!' and a 'Register Now' button. Below this is a section with a play button icon and the text 'BASICS WITH BABISH BAR ESSENTIALS' over a video thumbnail of a drink. At the bottom are social media icons for Facebook, Twitter, Instagram, and LinkedIn. A red box highlights a new HTML block being added, containing the code: `1 <div class="our-class"> I'm a new HTML block. </div>`. Below the preview, there is a 'BLOCK OPTIONS' section with a 'Hide on' dropdown set to 'DESKTOP' and 'MOBILE' options.

GRAND KEY CLUB

##SHOWSDATE1##

Golf / Dining / Tennis

HAPPY HOUR!
Join us Thursday at 6pm for half priced drinks, socializing, and fun!
[Click here to register](#)

Don't feel like waiting? Try some recipes at home!

BASICS WITH BABISH
▶ BAR ESSENTIALS

f i in

123 Grand Key Ave., Ginger Island, BVI

Help SAVE

CONTENT ROWS SETTINGS

CONTENT PROPERTIES

Dining Delete

Text Dining

Link type Open web page

Url

Link file

Title

Target Current page

Tennis Delete

Text Tennis

Link type Open web page

Url

Link file

Title

Target Current page

+ Add new item

Font family Global font

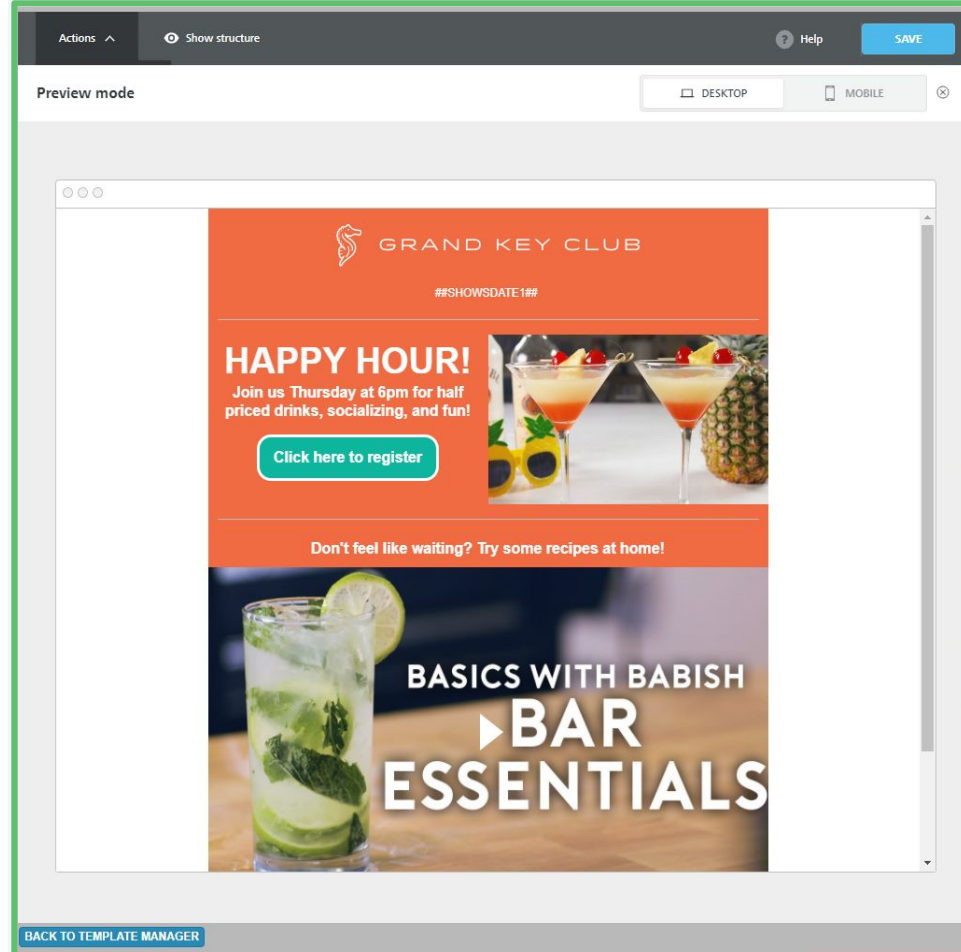
Font size - 16 +

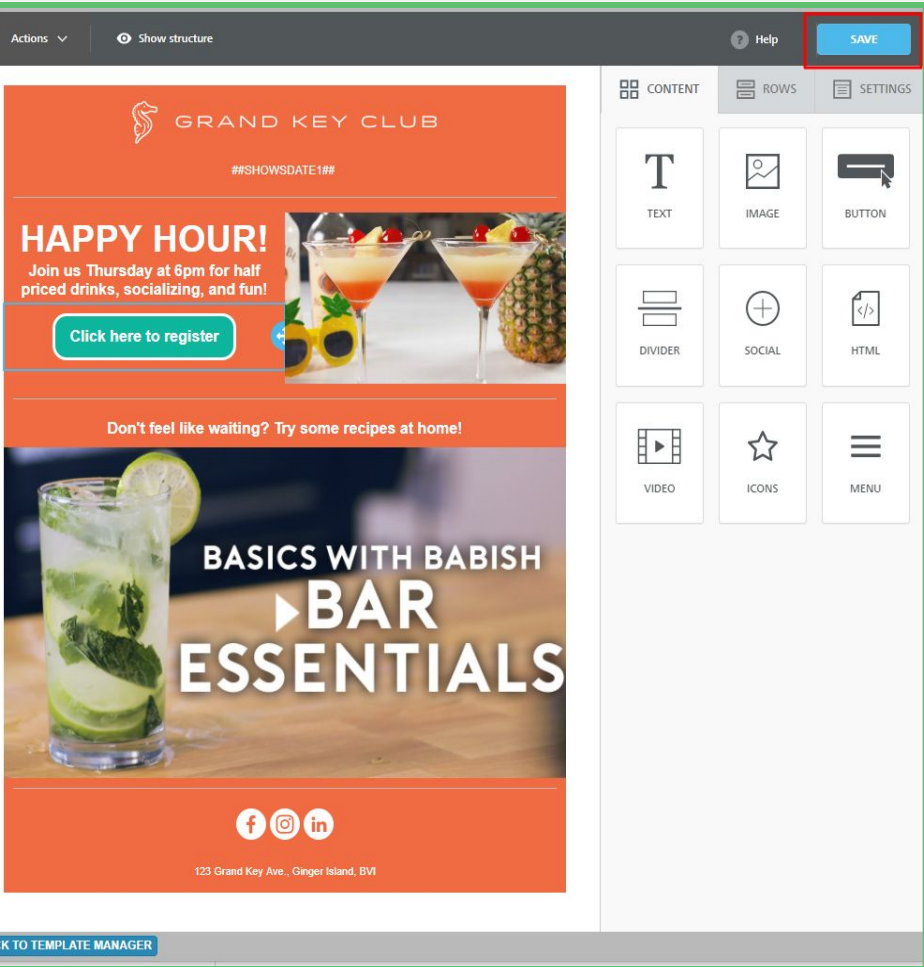
Menu

- Used to create table of contents or series of clickable links
- Often used in larger newsletters and articles.

Previewing Emails

- Preview how messages will look on both desktop and mobile devices before sending
- Toggle from Desktop view to Mobile view
- The Email Editor is mobile-responsive automatically stacking content making it easy to read on mobile devices





Saving Emails

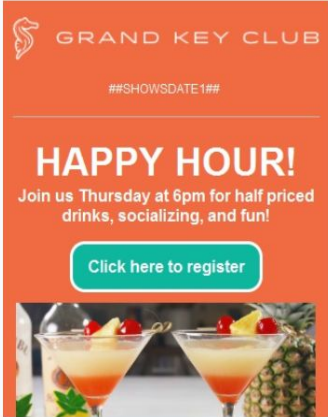
- Clicking the **Save** button in the Email Editor will take you out of the Email Editor and back to the Compose Email screen where your work will be saved in the Body of the email.
- Clicking **Save** will ***not*** save your work as a Template; it will only save your work as a Draft email.

Saving As A Template

- Select **Save As Template** under the Actions dropdown in the Email Editor
- Enter the Template Name for your template
- Select the Category for your template
- Click **Save Changes**
- Your new template can now be found under the Saved area of the Template Manager

Template Name

Category



The preview shows a promotional email for Grand Key Club. It features an orange header with the club's logo and name. Below the header is a placeholder for a show date. The main content is a 'HAPPY HOUR!' announcement for Thursday at 6pm, offering half-priced drinks and socializing. A green button with white text says 'Click here to register'. The bottom of the preview shows two martini glasses with fruit garnishes and a pineapple.

Inbox

[Inbox](#) [Compose](#) [Drafts](#) [Filed](#) [Sent](#) [Scheduled](#) [Groups](#) [Dynamic Groups](#)

[Edit Disclaimer Text](#)

User Drafts

Message Subject	Create Time	Last Update
Lobster Bake	9/2/2020 11:58:24 AM	9/2/2020 11:58:58 AM
October Newsletter	9/2/2020 11:57:16 AM	9/2/2020 11:58:02 AM
Club Happy Hour	9/1/2020 4:26:58 PM	9/2/2020 9:18:30 AM
Club News and Events	8/25/2020 11:23:52 AM	8/28/2020 6:02:56 PM
Tacos & Tequila	8/4/2020 8:42:28 AM	9/1/2020 5:43:39 PM

Auto Created Drafts

You have no saved drafts



Accessing Drafts

- Emails being composed but not yet sent can be found in Drafts
- Drafts comprises of two sections: User Drafts and Auto Created Drafts
- Emails without a Subject Line will be saved as “No Subject”
- Both the Create Time and Last Update Time of your drafts is displayed
- No limit to the number of drafts that can be saved under User Drafts
- Max number of Auto Created Drafts saved is 25
- Drafts can be stored indefinitely until they are Removed or Sent
- Once sent, it is removed from Drafts and can be found in Sent

Revisting AutoSaves

- A log containing snapshots of your work taken every minute you are in the Email Editor constructing your email
- Can be used to revert back to a previous version of your work
- AutoSaves log purges every 24 hours; serves only as a short term safeguard for unexpected interruptions
- Opening an AutoSaves log will immediately launch the Email Editor with the contents of the log
- Saving an AutoSaves log within the Email Editor will replace the content of your email with the AutoSaves log content
- Returning Back to Template Manager without saving the log in the Email Editor will retain the contents of your existing email and will not replace it with the AutoSaves log content

Get Started

Branded Themes Saved **AutoSaves**

09/01/2020 3:17 PM	Open
09/01/2020 3:16 PM	Open
09/01/2020 3:15 PM	Open
09/01/2020 3:14 PM	Open

Get Started

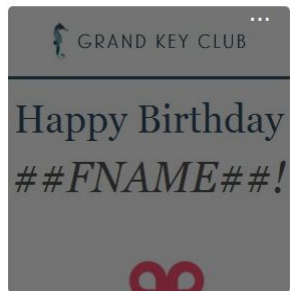
Create New

Branded Themes Saved AutoSaves

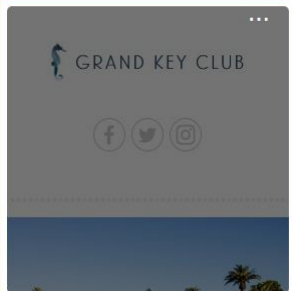
-- Select All --

Search Themed Templates

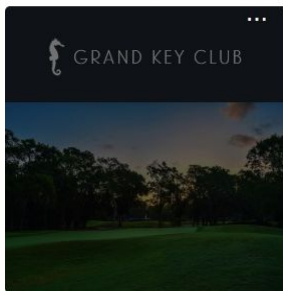
Reset



Birthday 1



Newsletter 2



Newsletter 3

Creating an Email Using a Template

- From the Admin bar, select Compose Email
- Enter a Subject for your email
- Select **Click to Edit - New** to open the Template Manager
- Select a template from Branded, Themes, or Saved
- Click on the selected template to launch into the Email Editor

Other Email Features

- Ability to compose **HTML**, **Plain Text** or **Text** messages
- Ability to directly edit the HTML (HyperText Markup Language) via **Edit As Text**
- Always select “**Send message to external email address only**” (default option)
- Ability to deliver to Primary, Secondary or Both email addresses when sending
- Ability to **Track This Message** which will provide more detailed reporting of the message within Mail Reporting (Open Rate, Click Through Tracking, etc.)
- Ability to be notified when the sending of your message is complete
- Ability to **Send A Test** of your message before final distribution
- Ability to **Send Message Now** or **Schedule For Later** for 1x distribution or recurring distribution respectively
- Ability to **Make Changes** to your message and/or scheduled delivery time up until the time of distribution
- Ability to **Cancel** your message up until the scheduled delivery time



Clubessential Client Resource Center

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- Select the **Website** Product
- Under Webinars, select **Click to View Webinars**

Q&A

