# Ask a Question at Any Time!

Questions will be addressed periodically throughout the Webinar and at the end as time permits.

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Clubessential Education
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# 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
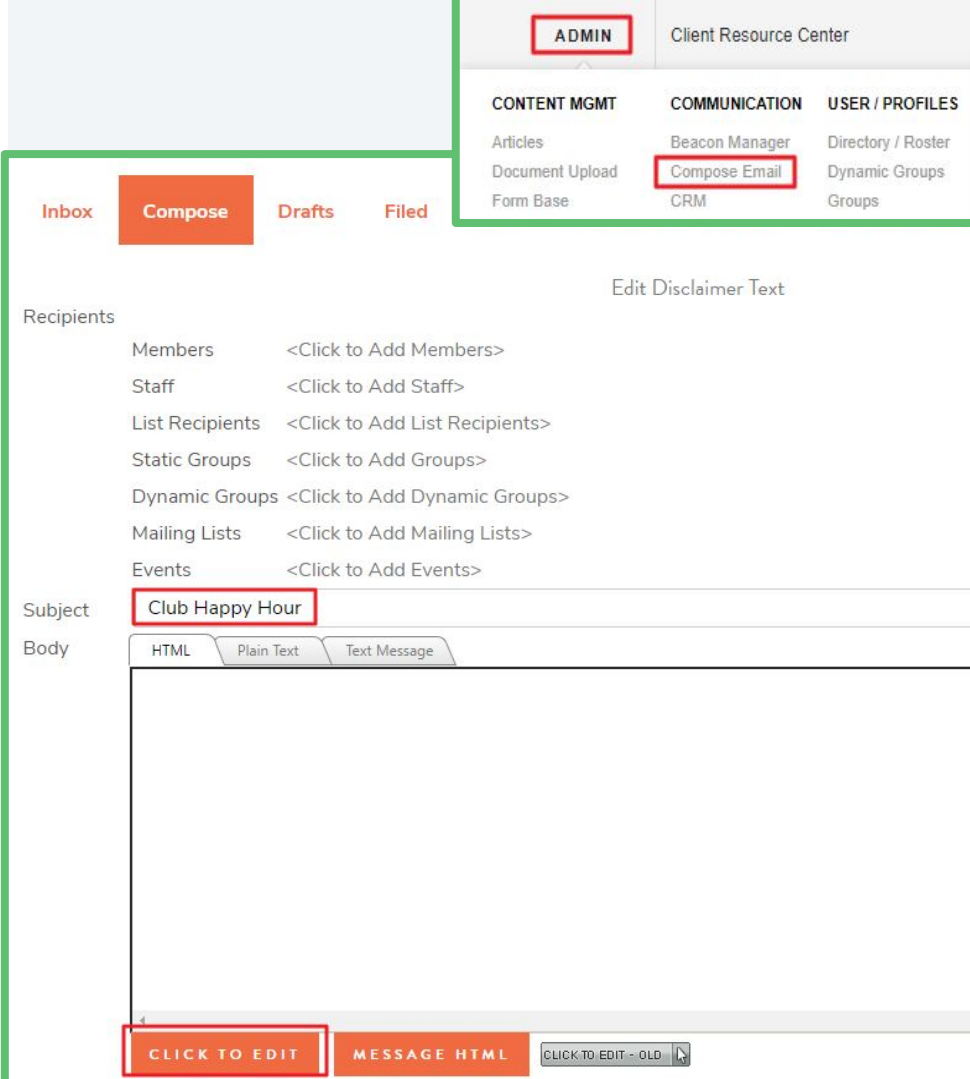
- Improve sales and increase brand awareness

## 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



ADMIN    Client Resource Center

| 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

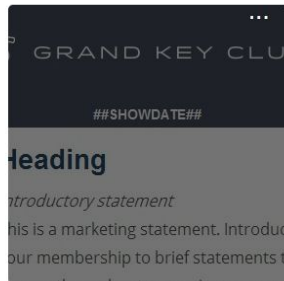CLICK TO EDIT    MESSAGE HTML    CLICK TO EDIT - OLD

# Template Manager

- A repository for all your email templates

- Allows you to Save and Categorize your templates

- Includes four separate template categories:
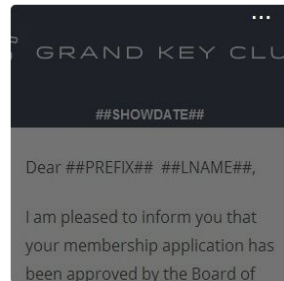  - Branded
  - Themes
  - Saved
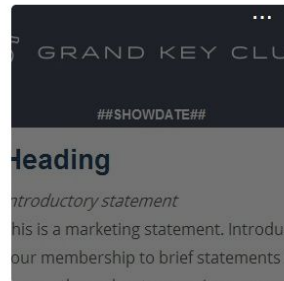  - AutoSaves

## Get Started

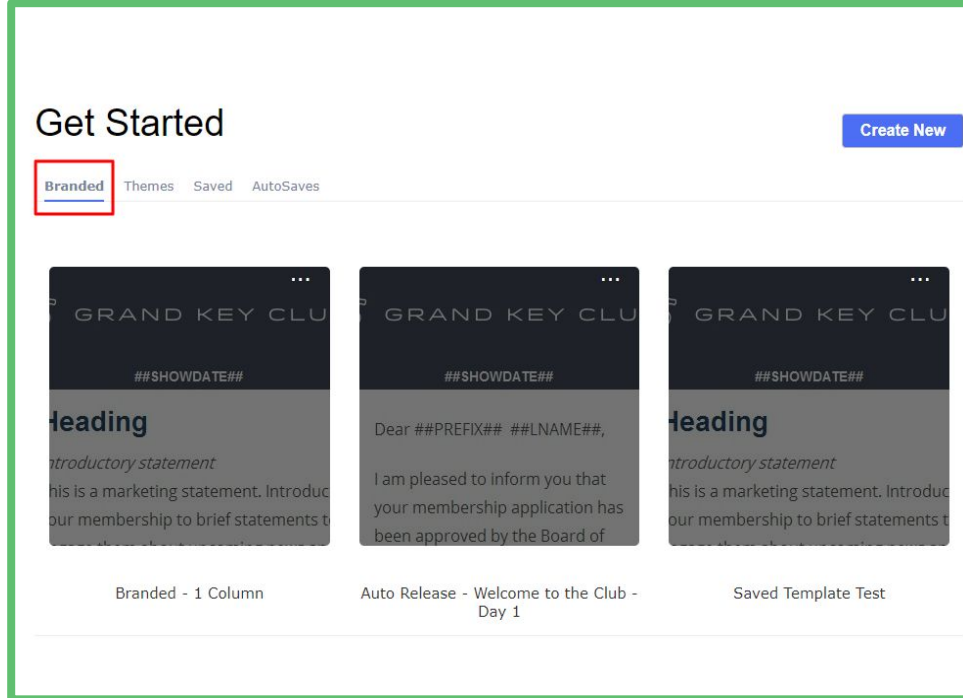Create New

Branded   Themes   Saved   AutoSaves

GRAND KEY CLU

##SHOWDATE##

**Heading**

Introductory statement
This is a marketing statement. Introduc
our membership to brief statements t

GRAND KEY CLU

##SHOWDATE##

Dear ##PREFIX## ##LNAME##,

I am pleased to inform you that
your membership application has
been approved by the Board of

GRAND KEY CLU

##SHOWDATE##

**Heading**

Introductory statement
This is a marketing statement. Introduc
our membership to brief statements t

Branded - 1 Column

Auto Release - Welcome to the Club - Day 1
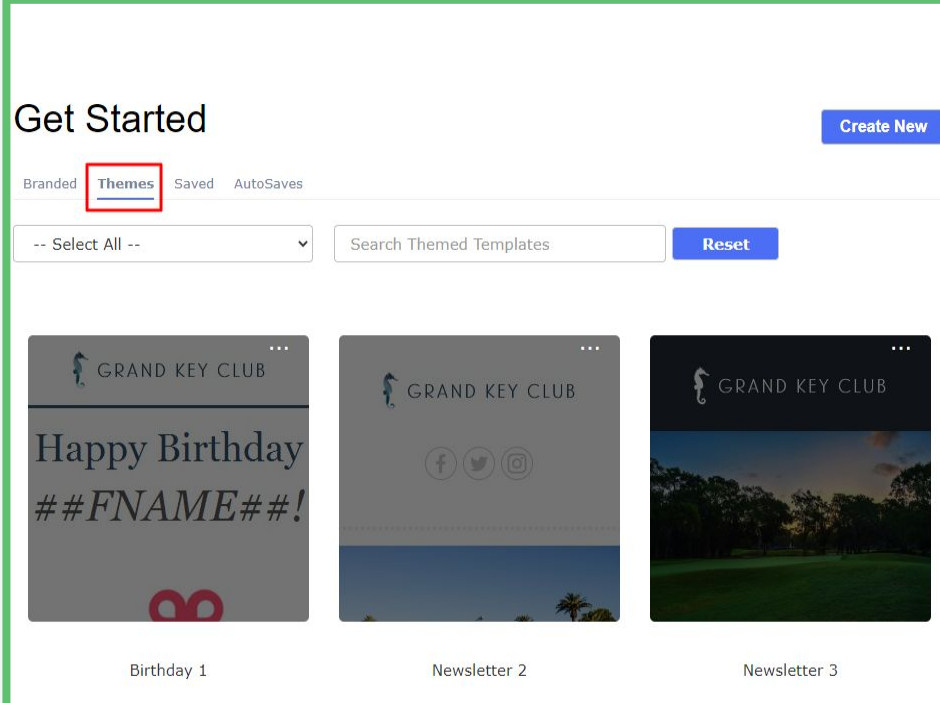
Saved Template Test

## 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
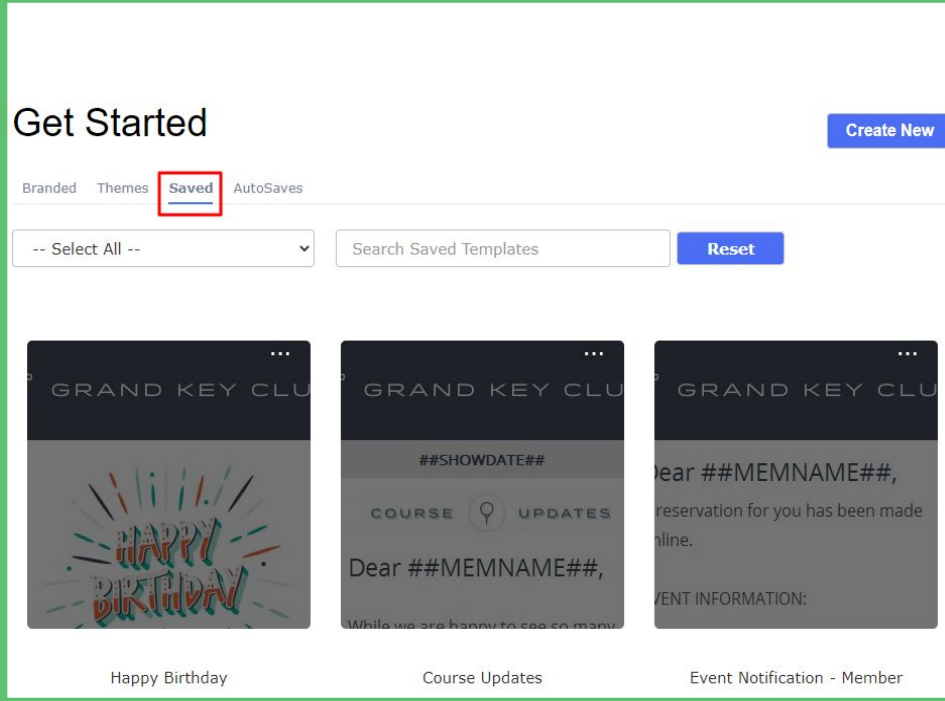
# Saved Templates

- 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 CLU

HAPPY BIRTHDAY

GRAND KEY CLU

##SHOWDATE##

COURSE ⊙ UPDATES

Dear ##MEMNAME##,

While we are happy to see so many

GRAND KEY CLU

Dear ##MEMNAME##,

reservation for you has been made online.

EVENT INFORMATION:

Happy Birthday    Course Updates    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
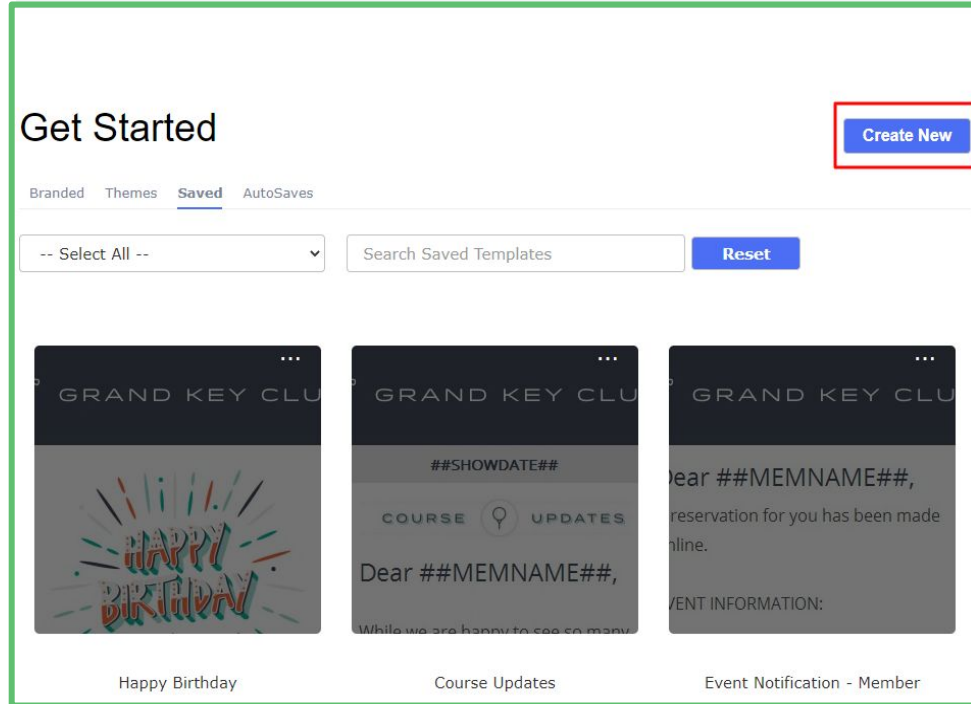
09/01/2020 3:15 PM   Open

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

| Happy Birthday | Course Updates | 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.
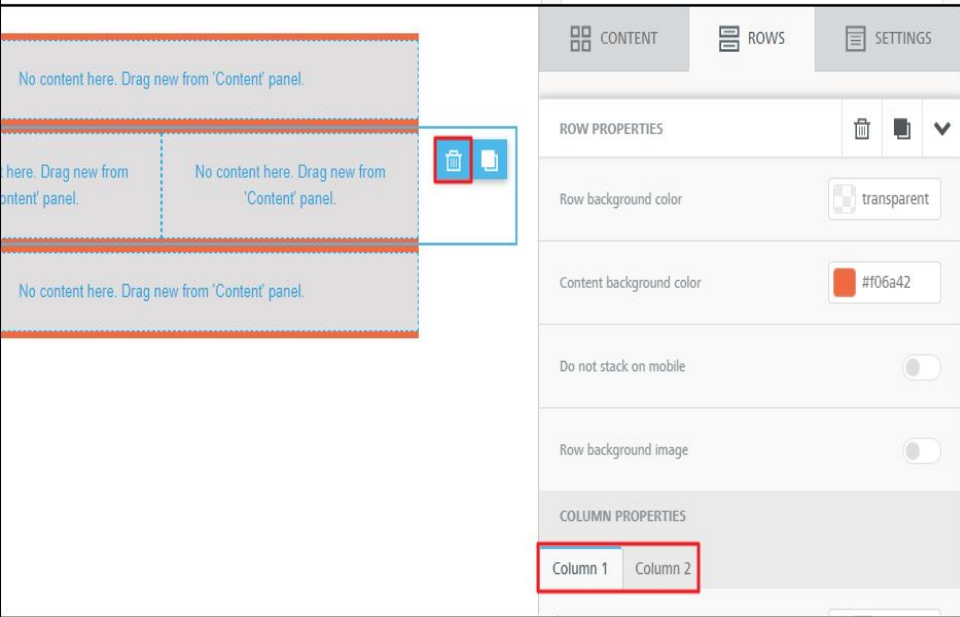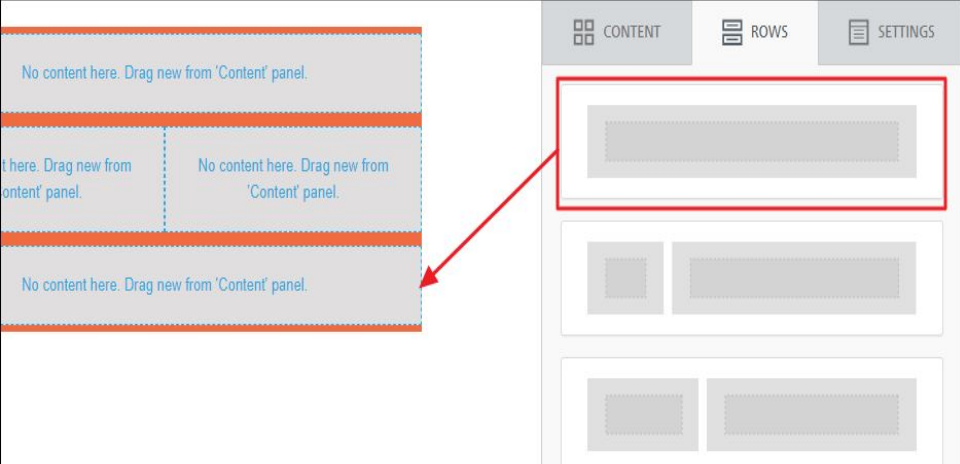
# Rows

- 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
- Columns - Use the Column 1 & 2 to alter settings for columns individually

# 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
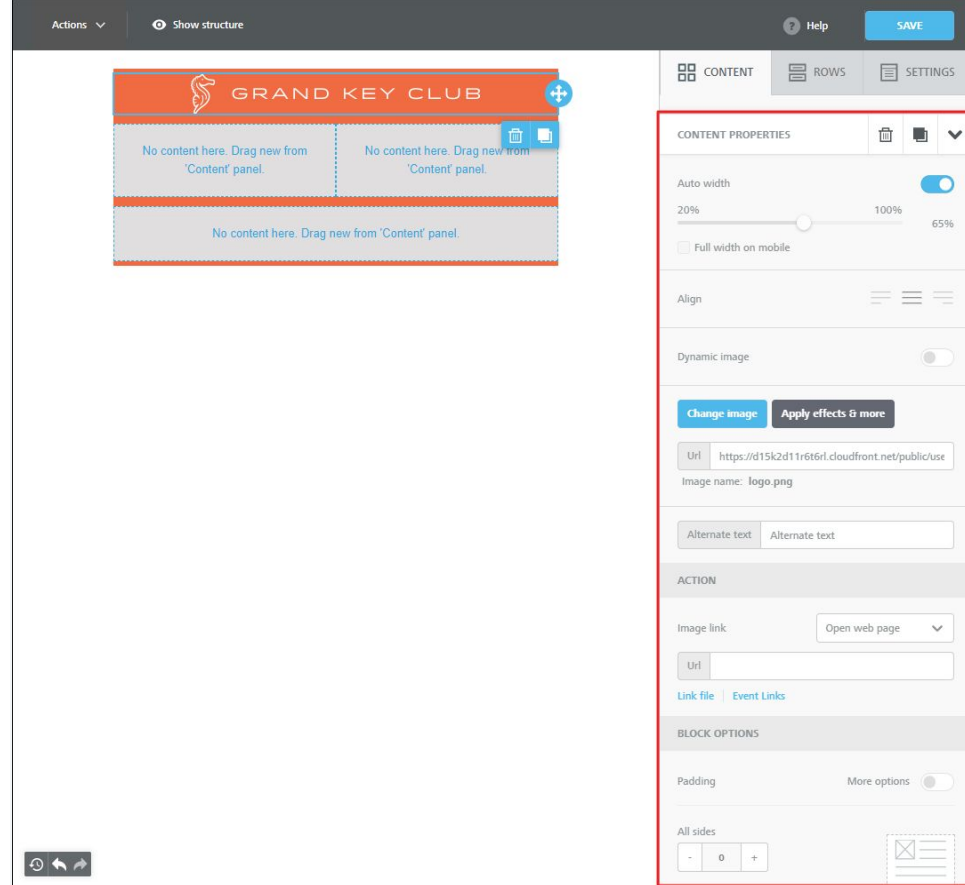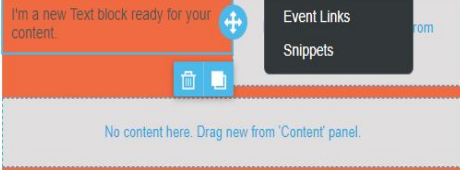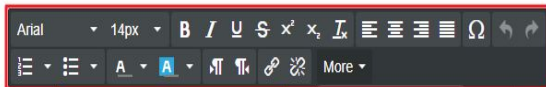- Use Trashcan to delete any unwanted images
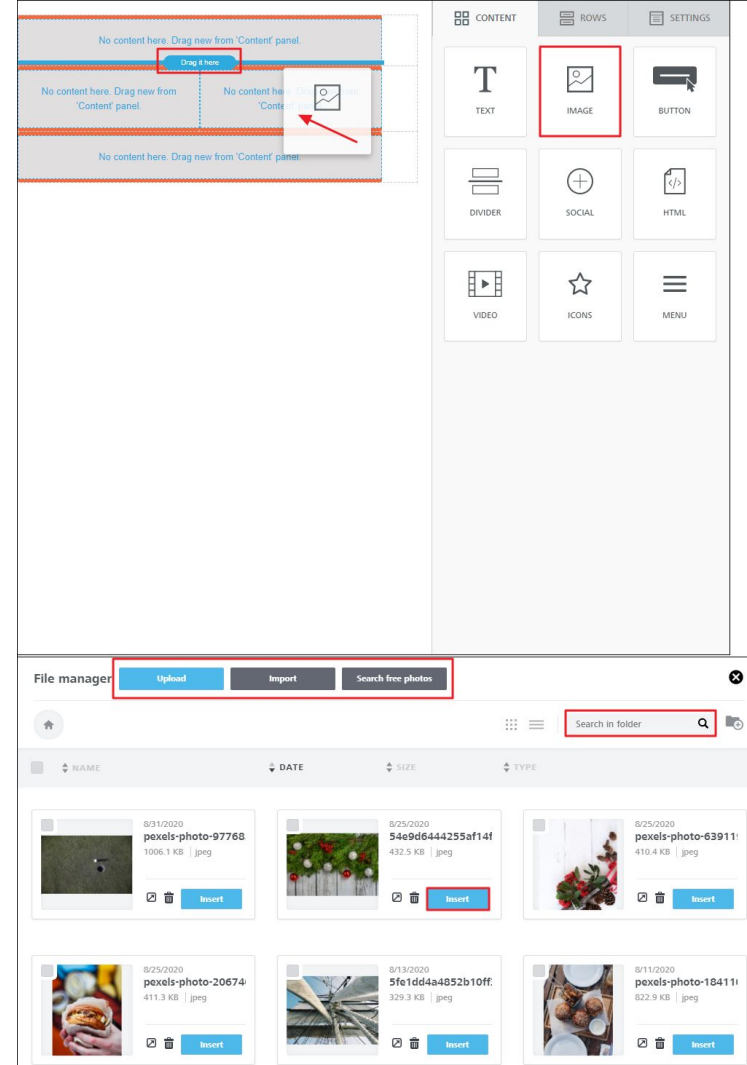
# Image Settings

- 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)

# 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
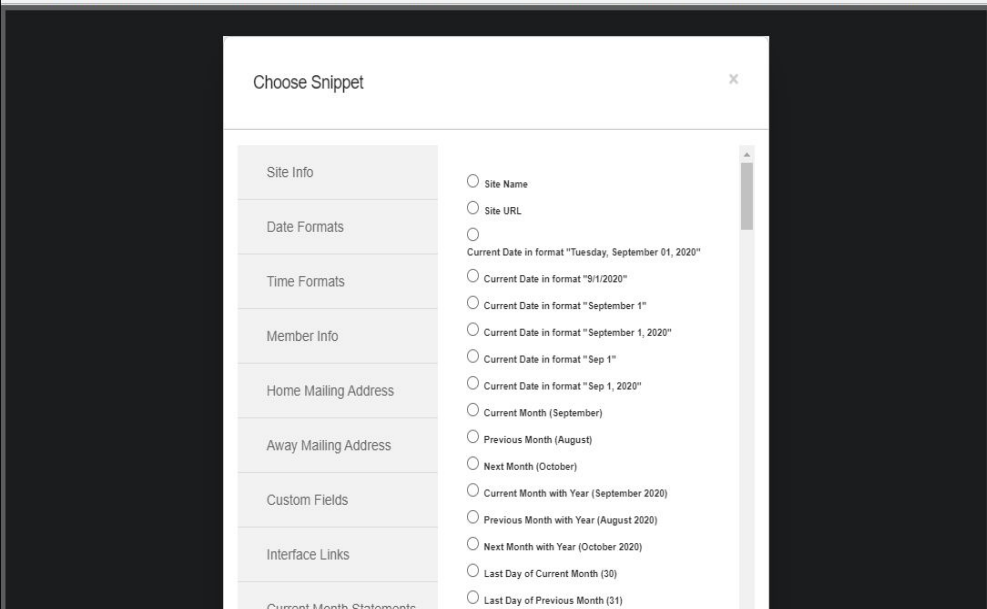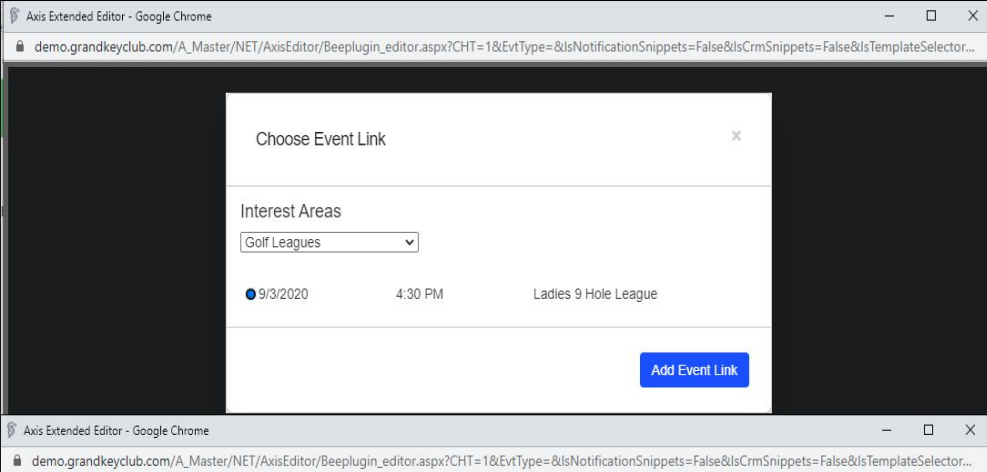
# Text (Advanced)

- 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.
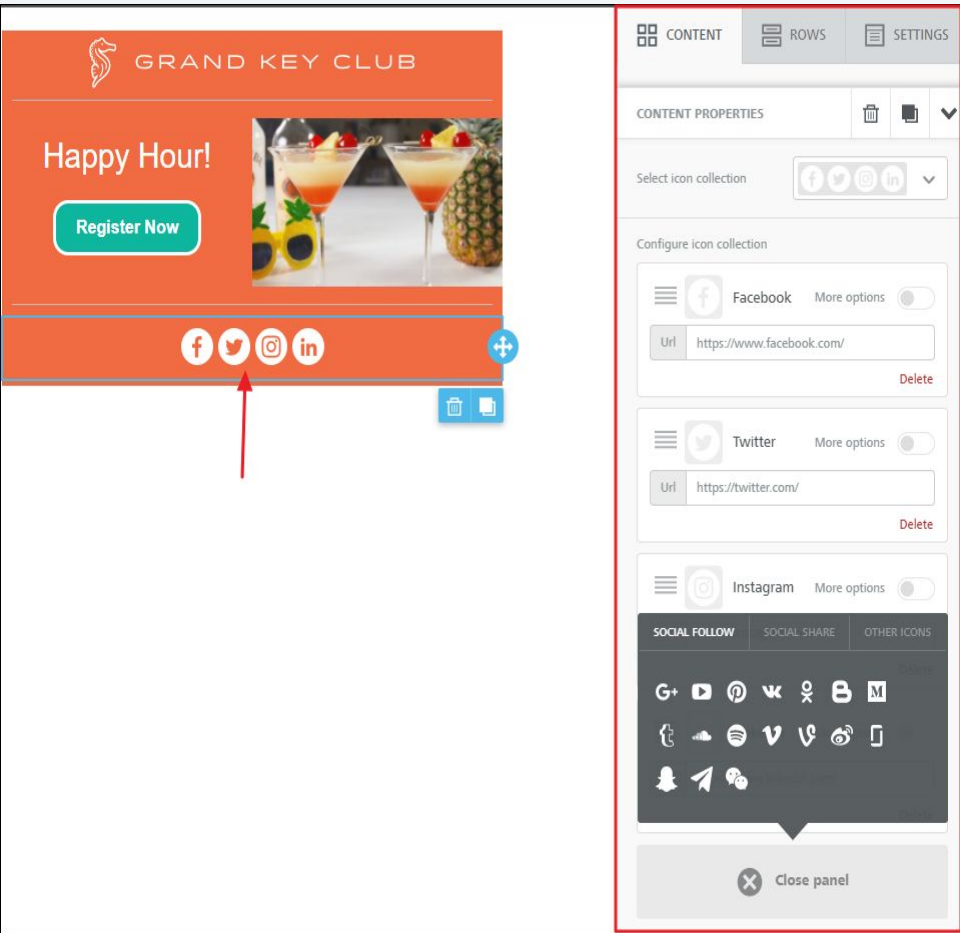
# Buttons

- 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.

# 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.

## 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.
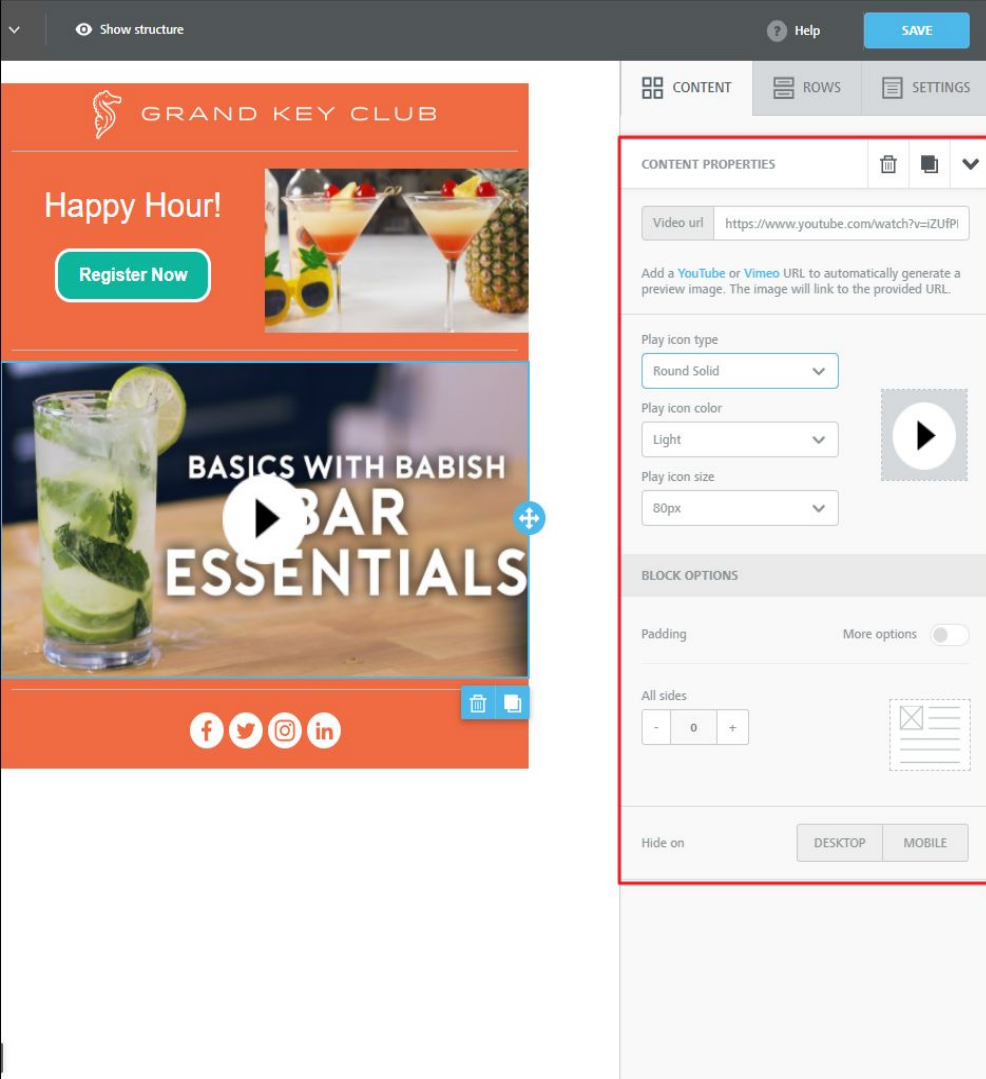
## Videos

- 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.

## 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
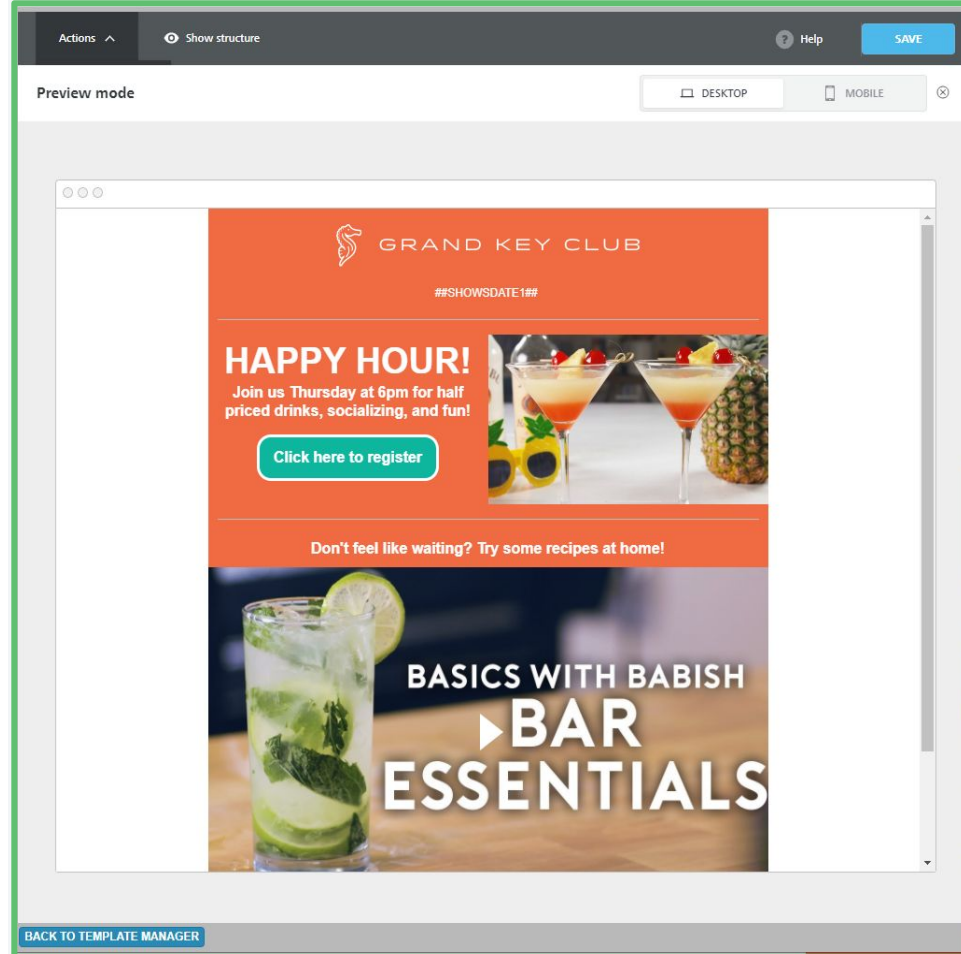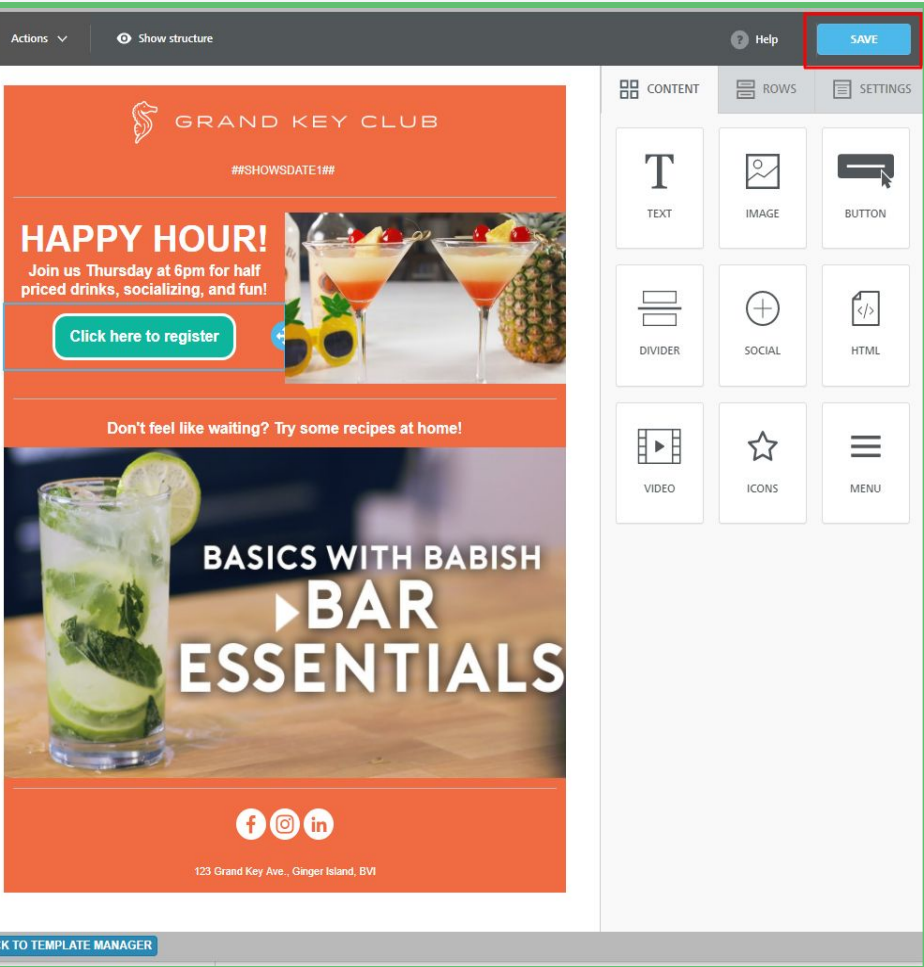
## Saving Emails
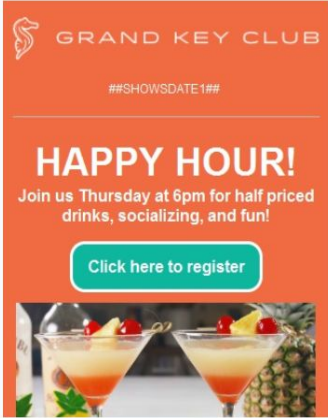
- Clicking the **Save** button in the Email Editor will take you out of the Email Editor and back to the Compose Email screen where your work will be saved in the Body of the email.

- 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

## 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**
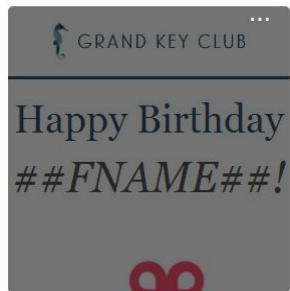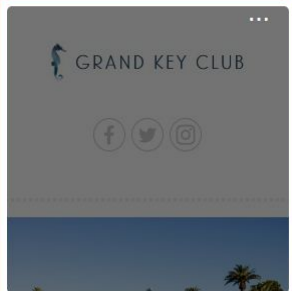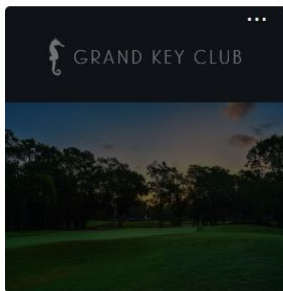
## Creating an Email Using a Template

- 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

Check out information on the **Client Education Resource Center** to get started using the Email Editor Today!

*clubessential.com/new-email-editor*

**Client Education Resource Center**

# CLUBESSENTIAL

# Q&A