

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.

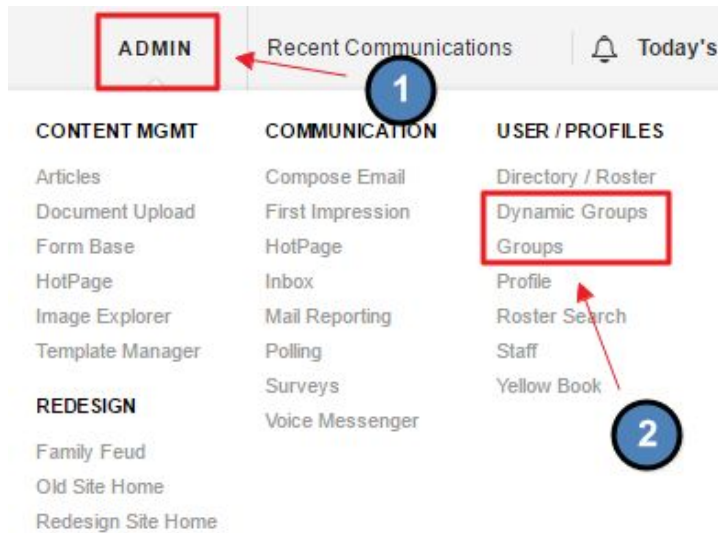
Static Opt-In Groups: special static group that allows members to opt-in to the group. Members can **opt-in/opt-out** by accessing their **Profile** page in the **Member Directory**.

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**.

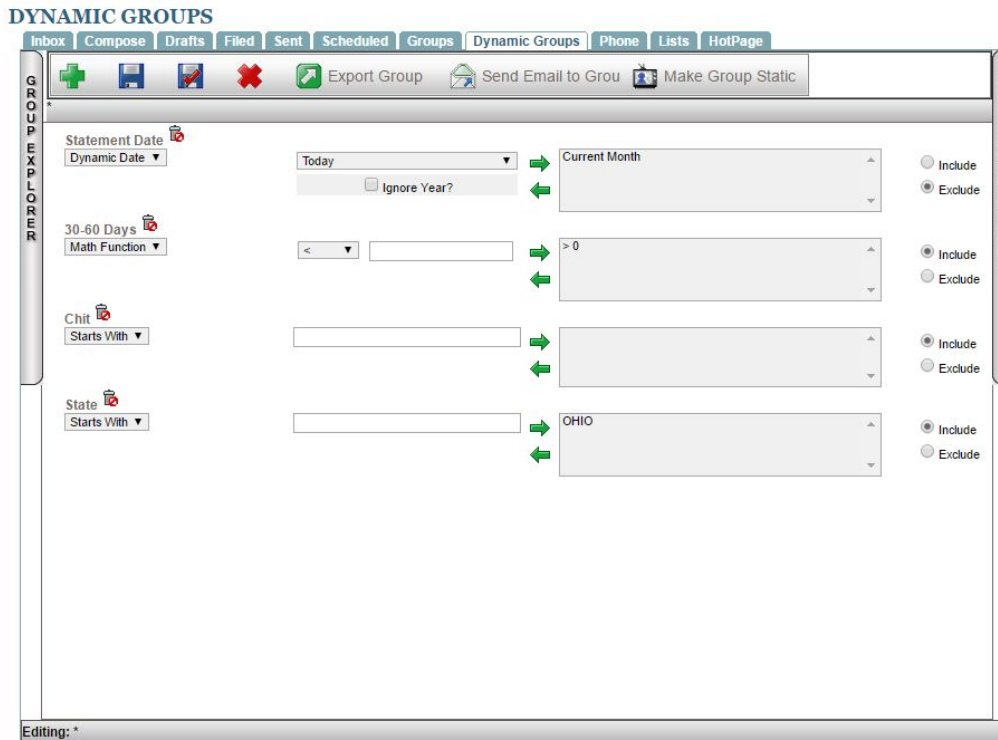


Editors: Hover over **Admin** in the main navigation, select **Main Tools**, and then **Inbox/Groups**.



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

From **Dynamic Groups**:



From **Static Groups**:

INBOX

Mail Reporting

Inbox | Compose | Drafts | Filed | Sent | Scheduled | **Groups** | Dynamic Groups | Phone | Lists | HotPage

[Edit Disclaimer Text](#)

To send a message to an existing group please click on the Compose tab.
Click a group's name to view its members

[Add Group](#) | [Import Groups](#) | [Group Update Log](#)

Inclusion Groups | **Exclusion Groups** | Select Category

Group Name	Description	Included Count	Opt In?	Synced?
		0	<input type="checkbox"/>	
		0	<input type="checkbox"/>	
		0	<input type="checkbox"/>	
Activities Committee	Do not delete - being used for security purposes	1	<input type="checkbox"/>	
Advisory Board		8	<input type="checkbox"/>	
All Members		15	<input type="checkbox"/>	
Andrea's Group	men's weekly dining group	5	<input checked="" type="checkbox"/>	
Ballroom Text Message		13	<input checked="" type="checkbox"/>	
bharding test		1	<input type="checkbox"/>	
Birth Dates 1961 - 1956		0	<input type="checkbox"/>	
Birth Dates 1961 - 1956		0	<input type="checkbox"/>	
Birthday Cake		10	<input checked="" type="checkbox"/>	
Board of Directors	Able to view the confidential Board of Directors Meeting Minutes Pages on the website	10	<input type="checkbox"/>	

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.

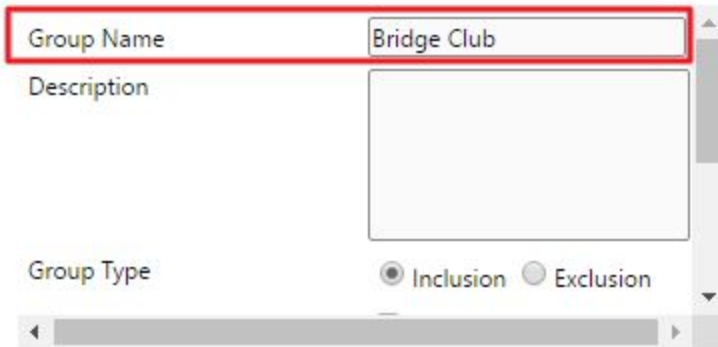


The **Add Group Interface** will show as follows:



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

Add New Group



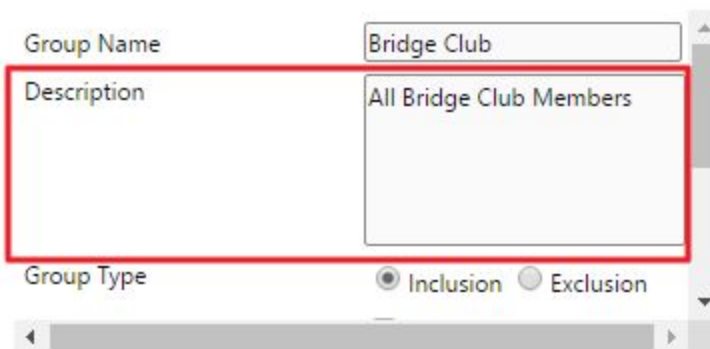
Group Name

Description

Group Type Inclusion Exclusion

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

Add New Group



Group Name

Description

Group Type Inclusion Exclusion

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

Add New Group

Group Name

Description

Group Type Inclusion Exclusion

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

Add New Group

Opt-In Group

Show Member Listing

Allow Invitations by Members

Only Allow Actions if in group?

Group Category

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

Add New Group ✕

Opt-In Group

Show Member Listing

Allow Invitations by Members

Only Allow Actions if in group?

Group Category

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

Add New Group ✕

Opt-In Group

Show Member Listing

Allow Invitations by Members

Only Allow Actions if in group?

Group Category

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

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

Add New Group ✕

Opt-In Group

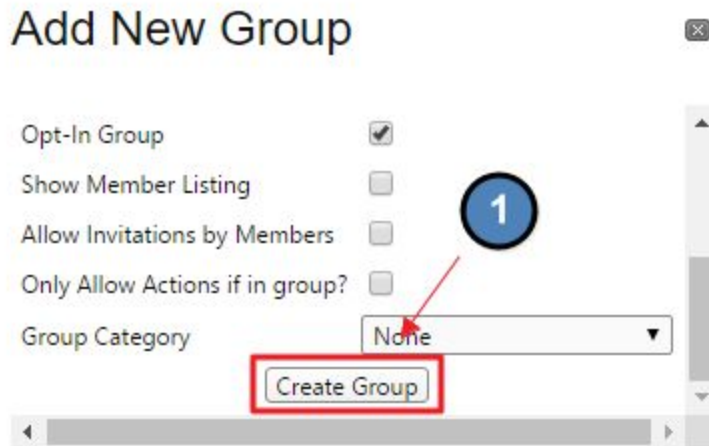
Show Member Listing

Allow Invitations by Members

Only Allow Actions if in group?

Group Category

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**.

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

[Edit Disclaimer Text](#)

[Back To Static Groups](#) [Edit Group Info](#) | [Group Update Log](#) | [Delete Group](#)

Group Name Bridge Club
Description All Bridge Club Members
Group Type Inclusion

0 total members included in this group are shown below [Show All](#) | [Export Group](#)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
<input type="checkbox"/>	Last Name		First Name		Email		Secondary Email		Expired																

No members are currently assigned to this group

[Add Members to Group](#) [Add Staff to Group](#) [Remove Selected Users](#)

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

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

[Edit Disclaimer Text](#)

[Back To Static Groups](#) [Edit Group Info](#) | [Group Update Log](#) | [Delete Group](#)


Group Name Bridge Club
Description All Bridge Club Members
Group Type Inclusion

0 total members included in this group are shown below [Show All](#) | [Export Group](#)

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z
<input type="checkbox"/>	Last Name		First Name		Email		Secondary Email		Expired																

No members are currently assigned to this group

[Add Members to Group](#) [Add Staff to Group](#) [Remove Selected Users](#)



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

Select Members

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

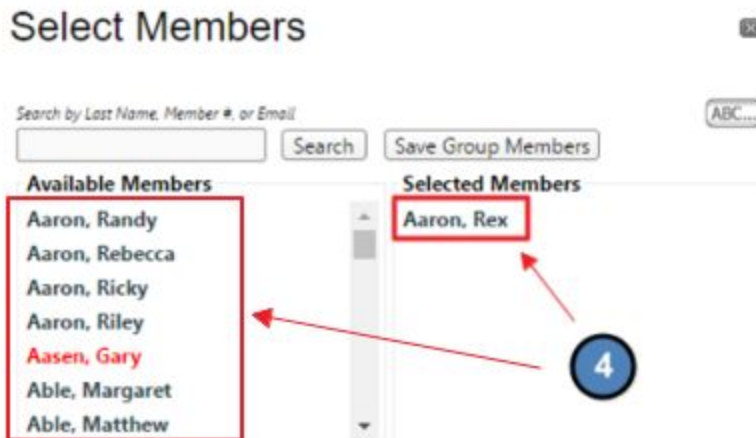
Available Members	Selected Members
Aaron, Randy	No Results Found
Aaron, Rebecca	
Aaron, Rex	
Aaron, Ricky	
Aaron, Riley	
Aasen, Gary	
Able, Margaret	

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.

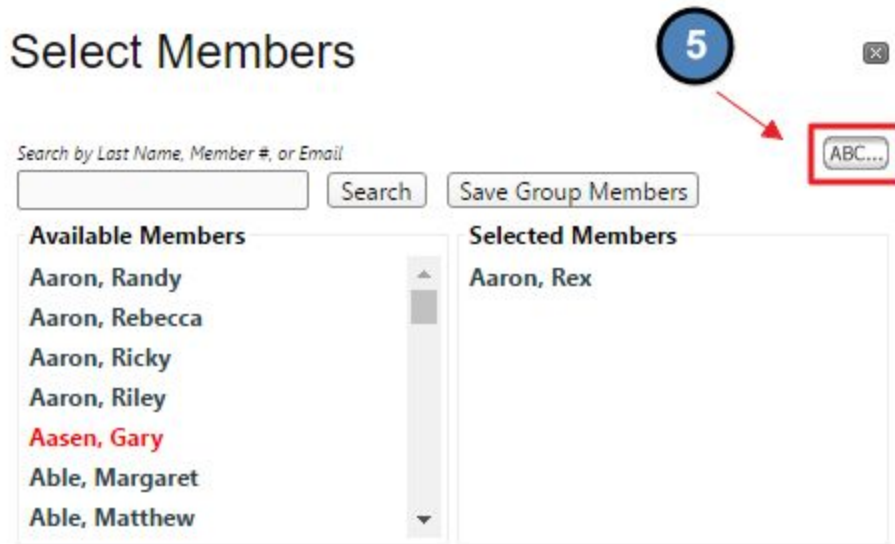
Select Members ABC...

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

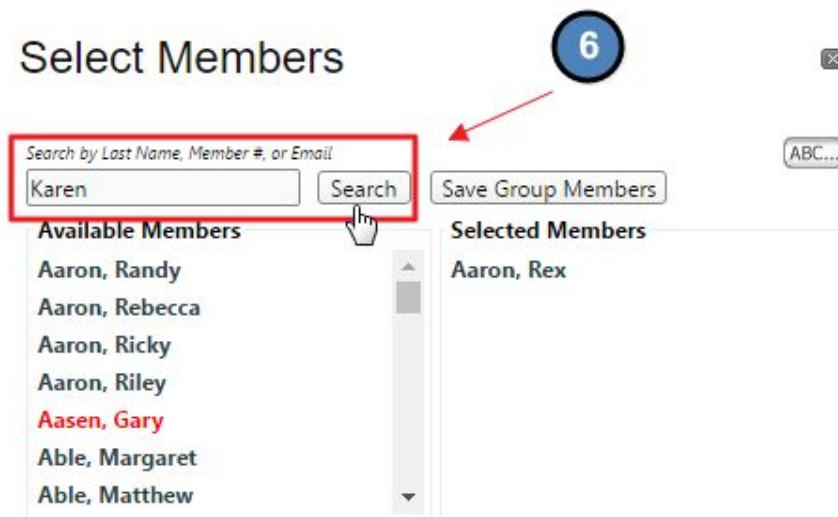
Available Members	Selected Members
Aaron, Randy	Aaron, Rex
Aaron, Rebecca	
Aaron, Ricky	
Aaron, Riley	
Aasen, Gary	
Able, Margaret	
Able, Matthew	



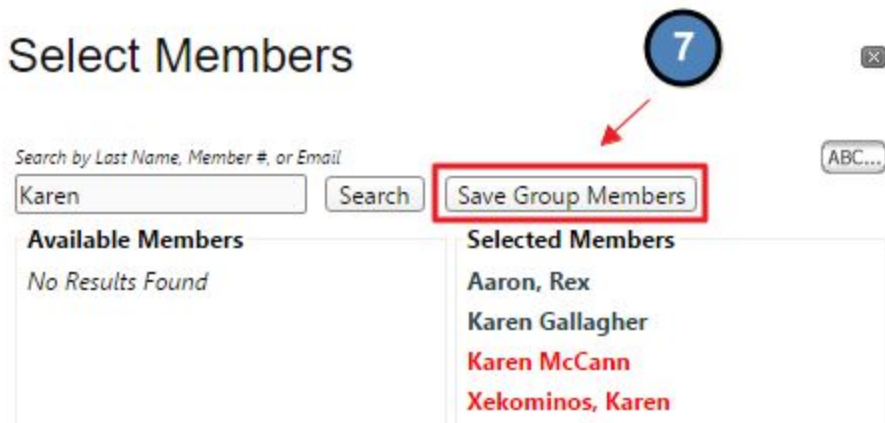
By default, only members with a last name starting with A will appear. Use the **ABC...** box to choose a different letter to continue to add members.



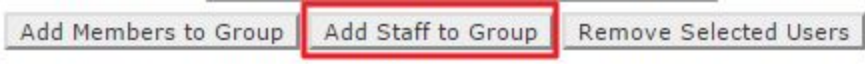
You may also use the **Search Box** to search for members by last name, member number, or email.



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.

* Required Fields

Membership Number	MBG3001
Relationship	0 - Self / Primary
Account Type	Corporate
Membership Level	Golf
Membership Begins	10/7/2010
Membership Expires	1/2/2100

Click checkboxes to have information displayed to other members in the Online Member Directory

Title	Mr.	<input checked="" type="checkbox"/>
First Name	Randy	
Middle Name		<input checked="" type="checkbox"/>
Last Name	Aaron	
Suffix		<input checked="" type="checkbox"/>
Display Name	Aaron, Randy	

Do not show me in the Online Member Directory

Allow Spouse to Impersonate Me

[Learn about this feature](#)



Opt-In Groups
Please select any groups below from which you would like to receive information

- Ballroom Text Message 🗺️
- Birthday Cake 🎂
- Bridge Club
- car club
- Creative Writing Group 📧 🗺️

Update Opt In 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](#).

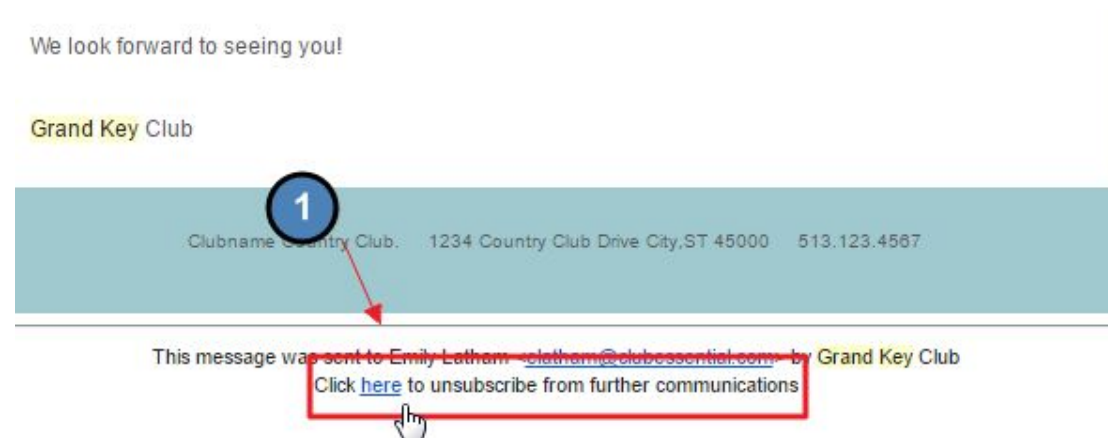
We look forward to making your special days memorable!

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**.



The **Unsubscribe Link** will take the user to a list of all **Opt-In** groups, whereupon they may update what groups they are in.

Unsubscribe Request 2

This form allows you to change the type of email you receive from your club, or to unsubscribe from club email altogether. Check the boxes for the "Opt In Groups" below to indicate which types of email you would like to continue to receive, or uncheck the boxes for mail you no longer wish to receive. If you wish to receive **no email at all** from the club at a particular email address, you may uncheck the box(es) at the bottom of the form. Click "Submit" at the bottom of the form to make your changes go into effect.

- Select All

- Andrea's Group

- Ballroom Text Message

- Birthday Cake

- Bridge Club

- car club

- Creative Writing Group

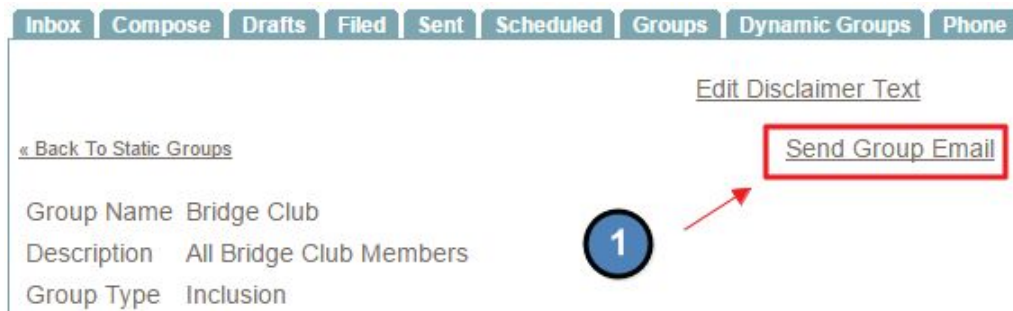
- Early Birds

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.

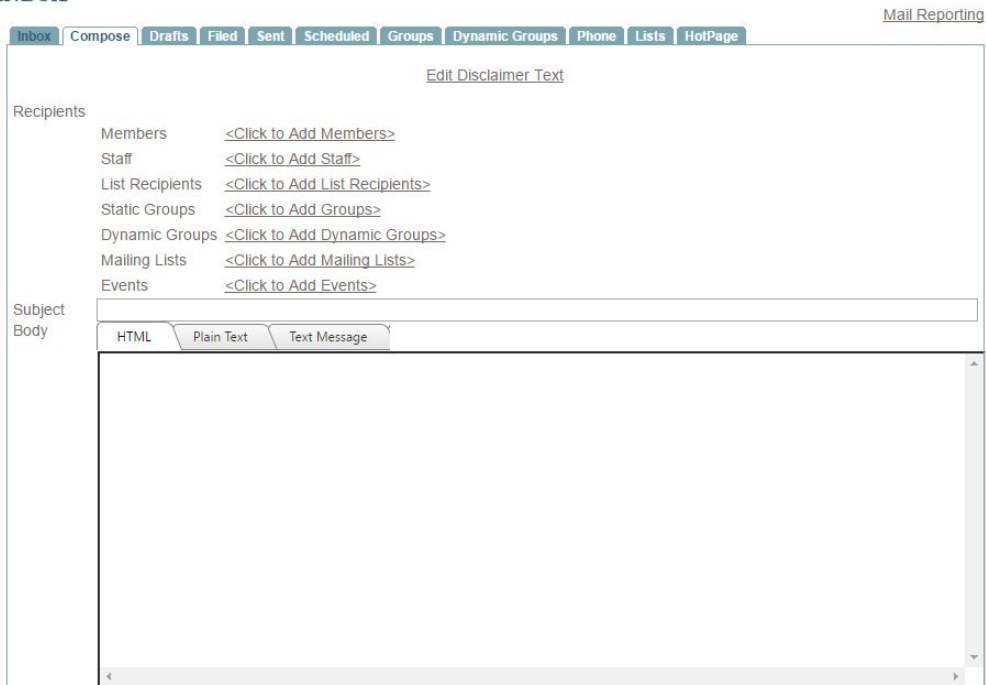
To send from the **Groups** tab, **click** on the group name in the **Groups** tab.

Next, click on the **Send Group Email** link.



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

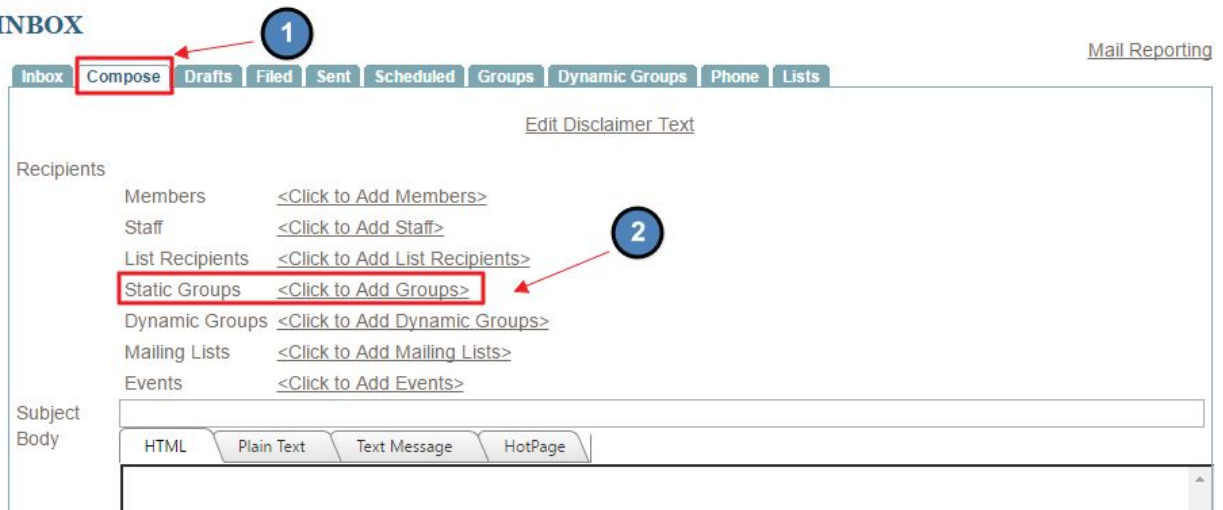
INBOX



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

Click **Add Static Groups** link.

INBOX



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

Select Groups ✕

Update Groups

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

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 Board of Directors Board of Directors Bridge Club Bridge Ladies car club chris' group Cigar Group	No Results Found

Note: In the image, a red box highlights 'Bridge Club' in the 'Available Static Groups' list, a red arrow points to it, and a blue circle with the number '1' is positioned above the arrow.

Click Update Groups, to then begin composing the email.



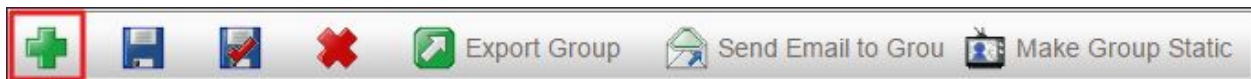
Dynamic Groups

Dynamic Groups Interface

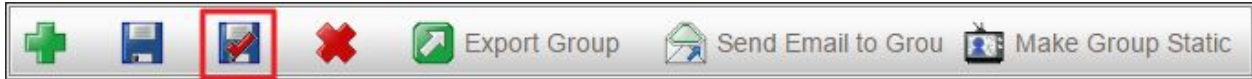
The **Dynamic Group Toolbar** allows for several options:

Add New Group

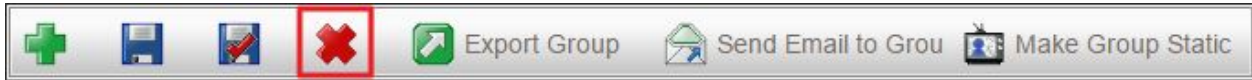
Save



Save and Close



Close Out



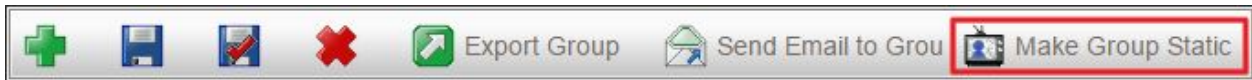
Export Group: this will allow us to export group information in a new window, or export to CSV.



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

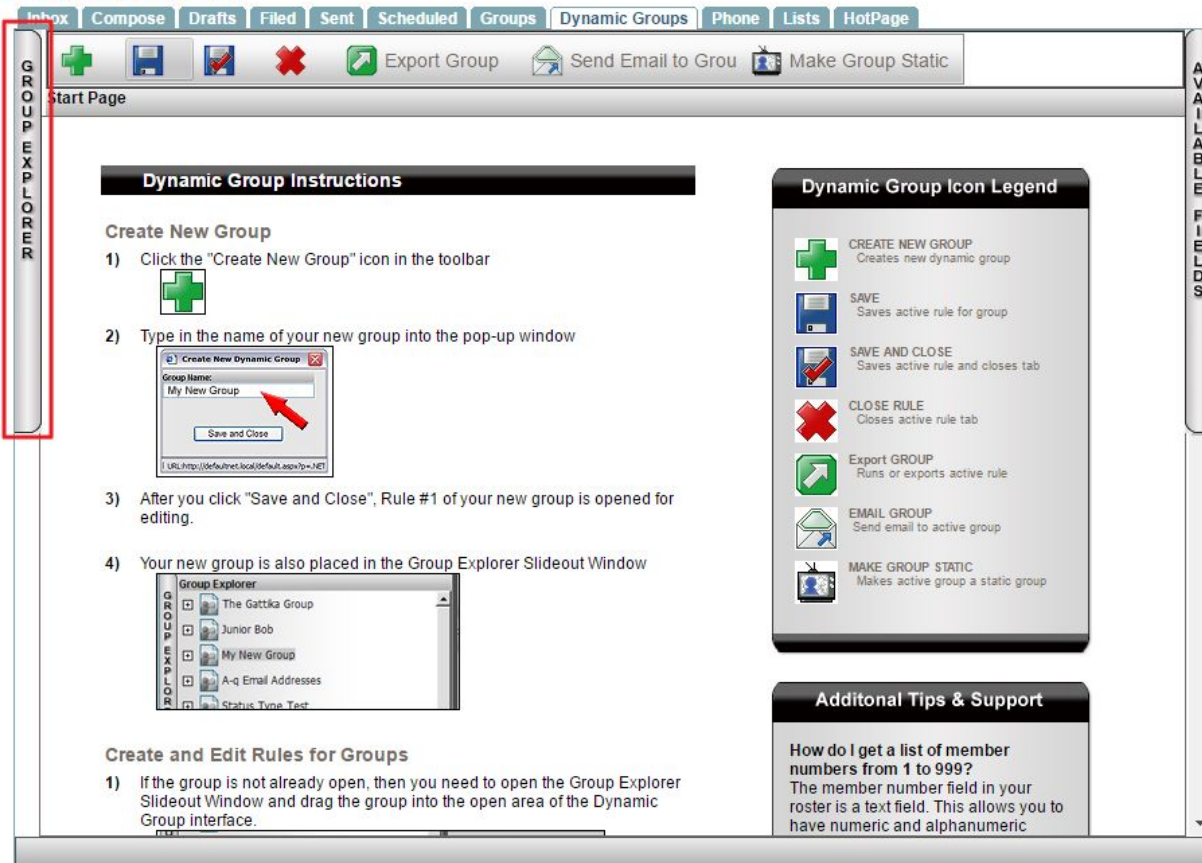


Make Group Static: mostly used by Clubessential to create special groups for page permissions.



Group Explorer: is where all of the groups are housed.



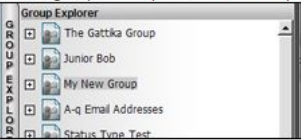
DYNAMIC GROUPS










The screenshot shows the 'Dynamic Groups' interface with a 'GROUP EXPLORER' sidebar on the left and 'AVAILABLE FIELDS' on the right. The main content area is titled 'Dynamic Group Instructions' and includes a 'Create New Group' section with four numbered steps. Step 1 points to a green plus icon in the toolbar. Step 2 shows a 'Create New Dynamic Group' dialog box with 'My New Group' entered in the 'Group Name' field. Step 3 shows the 'Group Explorer' sidebar with 'My New Group' listed. Step 4 shows the 'Group Explorer' sidebar with 'My New Group' listed. To the right of the instructions is a 'Dynamic Group Icon Legend' table with icons and descriptions for various actions like 'CREATE NEW GROUP', 'SAVE', 'SAVE AND CLOSE', 'CLOSE RULE', 'Export GROUP', 'EMAIL GROUP', and 'MAKE GROUP STATIC'. Below the legend is an 'Additional Tips & Support' section with a question about member numbers.

Dynamic Group Instructions

Create New Group

- 1) Click the "Create New Group" icon in the toolbar

- 2) Type in the name of your new group into the pop-up window

- 3) After you click "Save and Close", Rule #1 of your new group is opened for editing.
- 4) Your new group is also placed in the Group Explorer Slideout Window


Dynamic Group Icon Legend

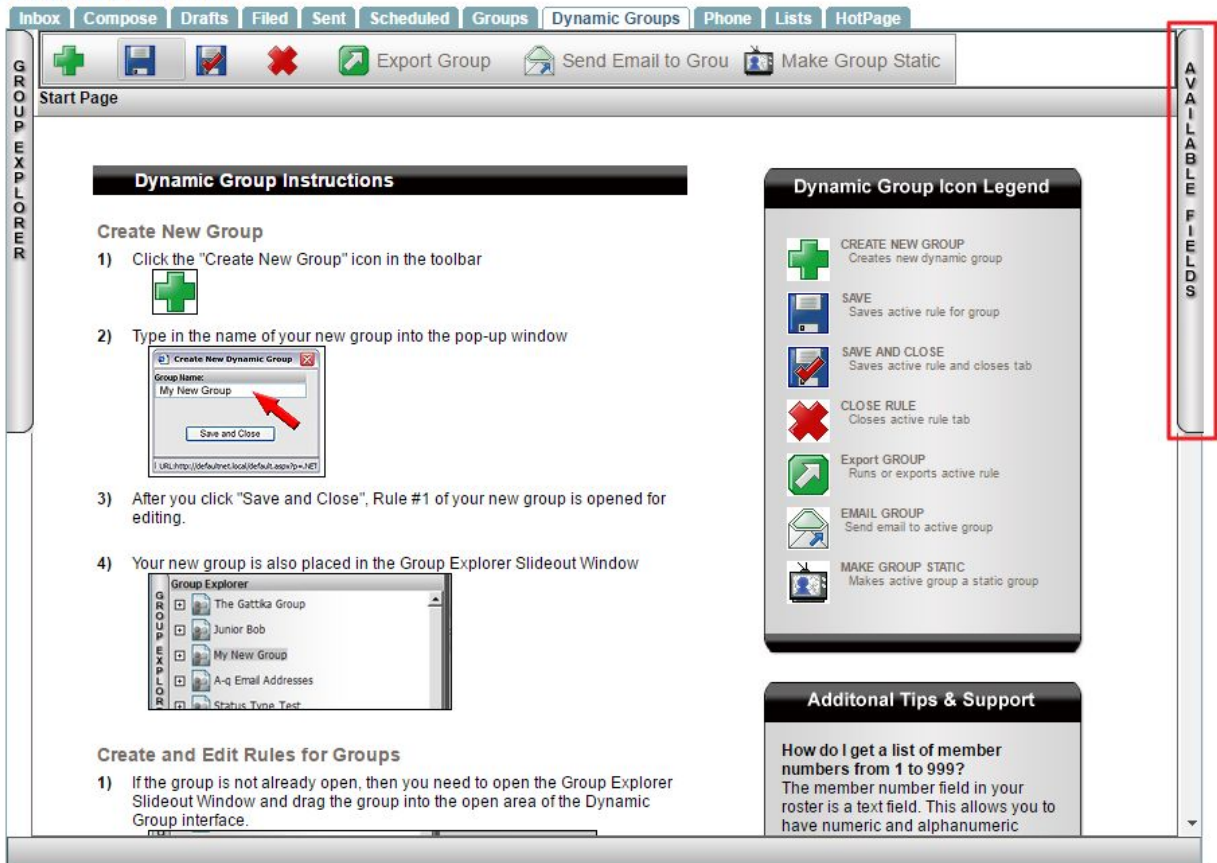
	CREATE NEW GROUP Creates new dynamic group
	SAVE Saves active rule for group
	SAVE AND CLOSE Saves active rule and closes tab
	CLOSE RULE Closes active rule tab
	Export GROUP Runs or exports active rule
	EMAIL GROUP Send email to active group
	MAKE GROUP STATIC Makes active group a static group

Additional Tips & Support

How do I get a list of member numbers from 1 to 999?
 The member number field in your roster is a text field. This allows you to have numeric and alphanumeric

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



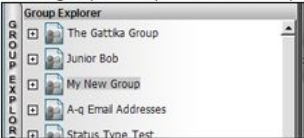
DYNAMIC GROUPS










The screenshot shows the 'Dynamic Groups' interface. At the top, there is a navigation bar with tabs for 'Inbox', 'Compose', 'Drafts', 'Filed', 'Sent', 'Scheduled', 'Groups', 'Dynamic Groups', 'Phone', 'Lists', and 'HotPage'. Below this is a toolbar with icons for 'Export Group', 'Send Email to Group', and 'Make Group Static'. The main content area is titled 'Start Page' and contains two main sections: 'Dynamic Group Instructions' and 'Dynamic Group Icon Legend'. The 'Dynamic Group Instructions' section provides a step-by-step guide on how to create a new group, including a screenshot of the 'Create New Dynamic Group' dialog box and the 'Group Explorer' window. The 'Dynamic Group Icon Legend' section lists various icons and their functions, such as 'CREATE NEW GROUP', 'SAVE', 'SAVE AND CLOSE', 'CLOSE RULE', 'Export GROUP', 'EMAIL GROUP', and 'MAKE GROUP STATIC'. A vertical red box on the right side of the interface is labeled 'AVAILABLE FIELDS'.

Dynamic Group Instructions

Create New Group

- 1) Click the "Create New Group" icon in the toolbar

- 2) Type in the name of your new group into the pop-up window

- 3) After you click "Save and Close", Rule #1 of your new group is opened for editing.
- 4) Your new group is also placed in the Group Explorer Slideout Window


Dynamic Group Icon Legend

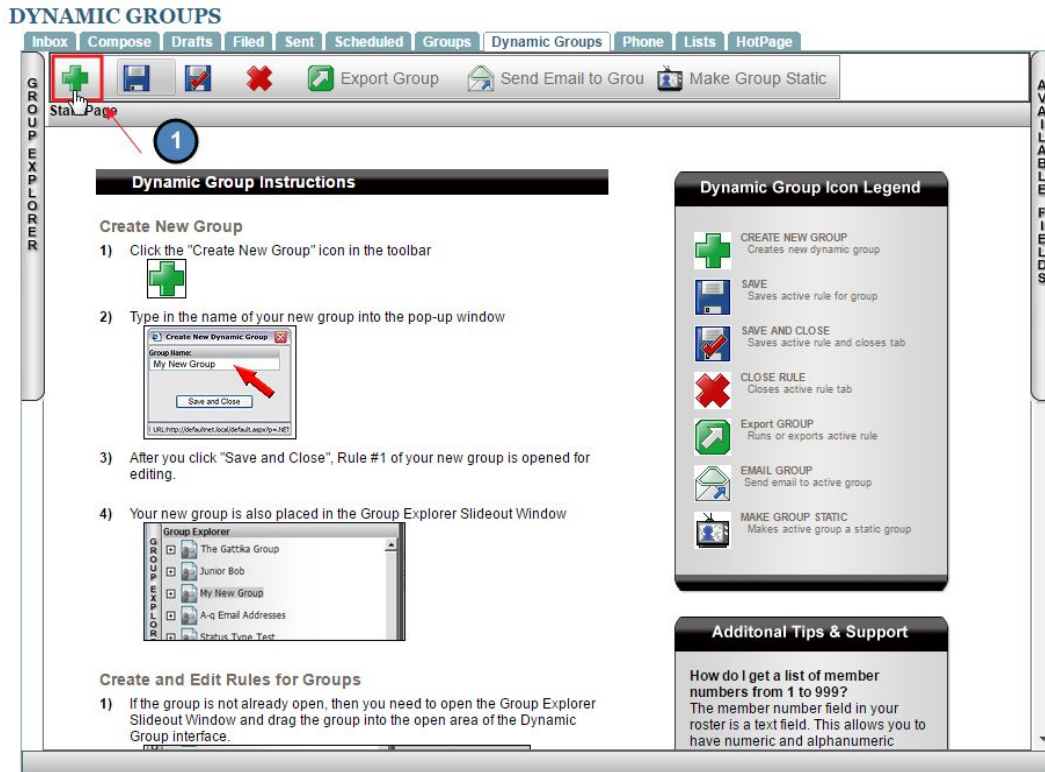
-  **CREATE NEW GROUP**
Creates new dynamic group
-  **SAVE**
Saves active rule for group
-  **SAVE AND CLOSE**
Saves active rule and closes tab
-  **CLOSE RULE**
Closes active rule tab
-  **Export GROUP**
Runs or exports active rule
-  **EMAIL GROUP**
Send email to active group
-  **MAKE GROUP STATIC**
Makes active group a static group

Additional Tips & Support

How do I get a list of member numbers from 1 to 999?
The member number field in your roster is a text field. This allows you to have numeric and alphanumeric

Adding Dynamic Groups

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



DYNAMIC GROUPS

Inbox Compose Drafts Filed Sent Scheduled Groups Dynamic Groups Phone Lists HotPage

Export Group Send Email to Group Make Group Static

Dynamic Group Instructions

Create New Group

- 1) Click the "Create New Group" icon in the toolbar
- 2) Type in the name of your new group into the pop-up window
- 3) After you click "Save and Close", Rule #1 of your new group is opened for editing.
- 4) Your new group is also placed in the Group Explorer Slideout Window

Dynamic Group Icon Legend

- CREATE NEW GROUP: Creates new dynamic group
- SAVE: Saves active rule for group
- SAVE AND CLOSE: Saves active rule and closes tab
- CLOSE RULE: Closes active rule tab
- Export GROUP: Runs or exports active rule
- EMAIL GROUP: Send email to active group
- MAKE GROUP STATIC: Makes active group a static group

Additional Tips & Support

How do I get a list of member numbers from 1 to 999?
The member number field in your roster is a text field. This allows you to have numeric and alphanumeric

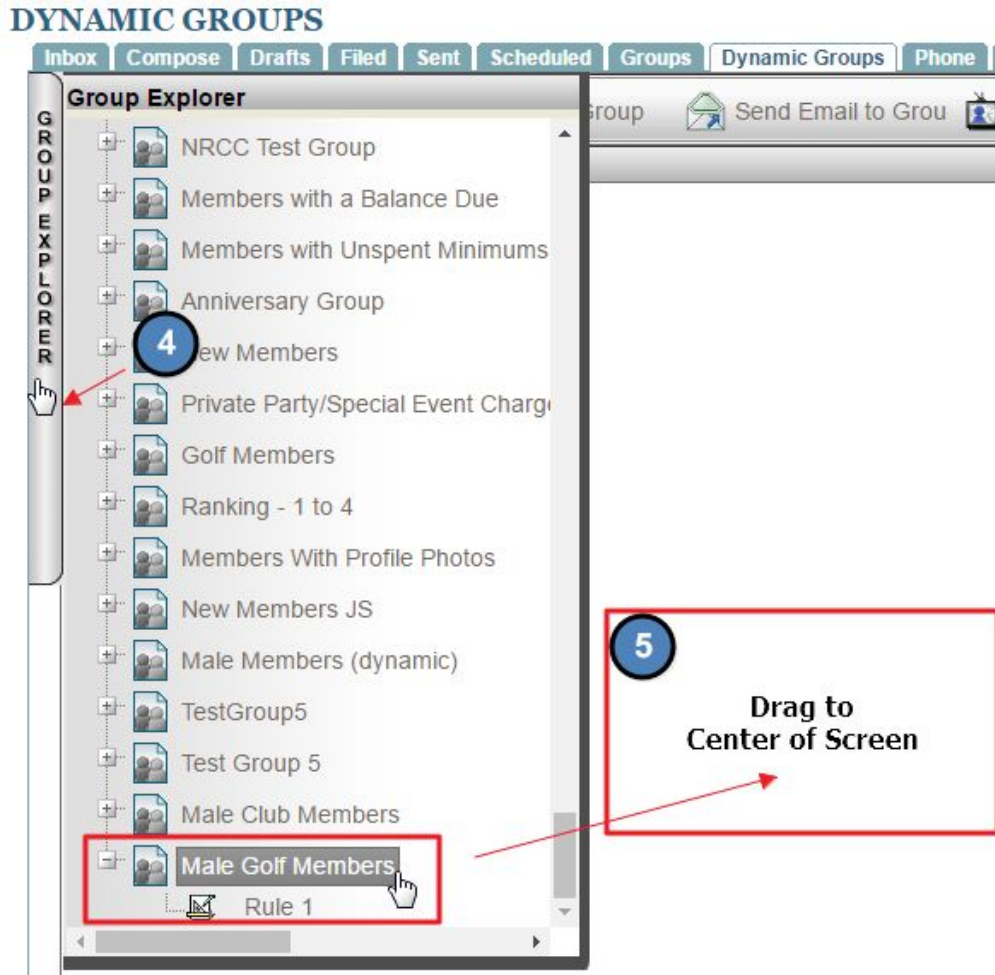
Add a **Name** for your Group. Note: this should be detailed to what type of members are in this group (ex: Male Golf Members).



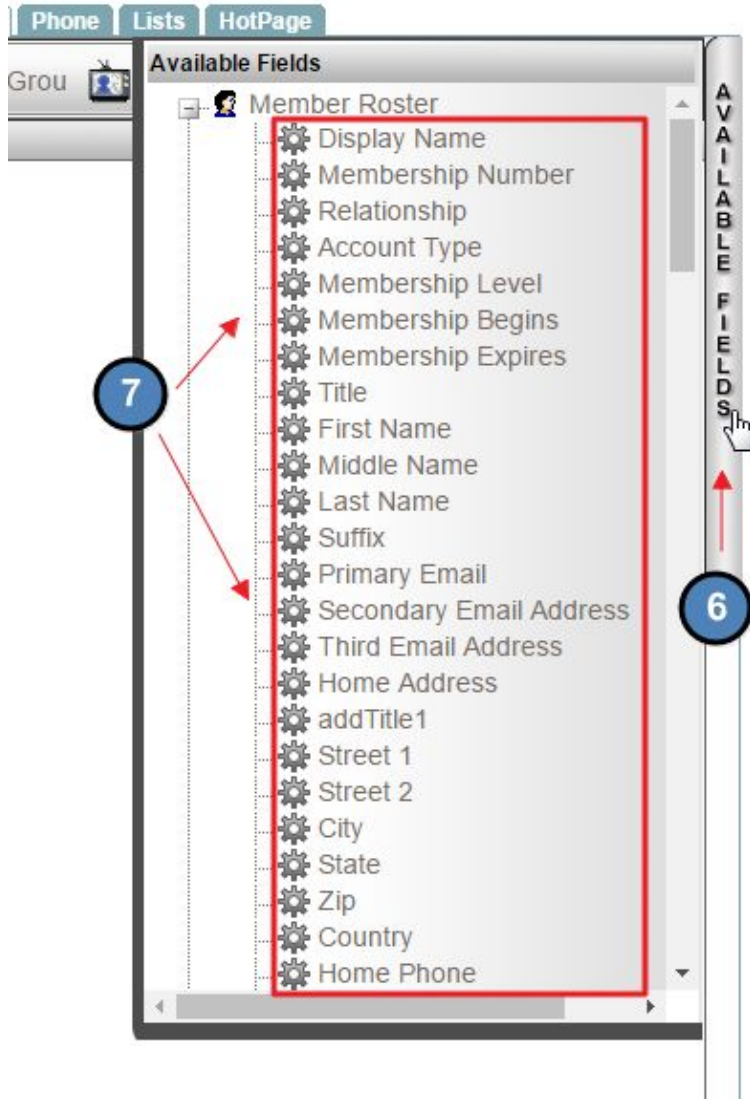
Next, click **Save and Close**.

Click the **Group Explorer** tab.

Scroll to find the group, and then drag the group to the center of the **Dynamic Group Interface**.

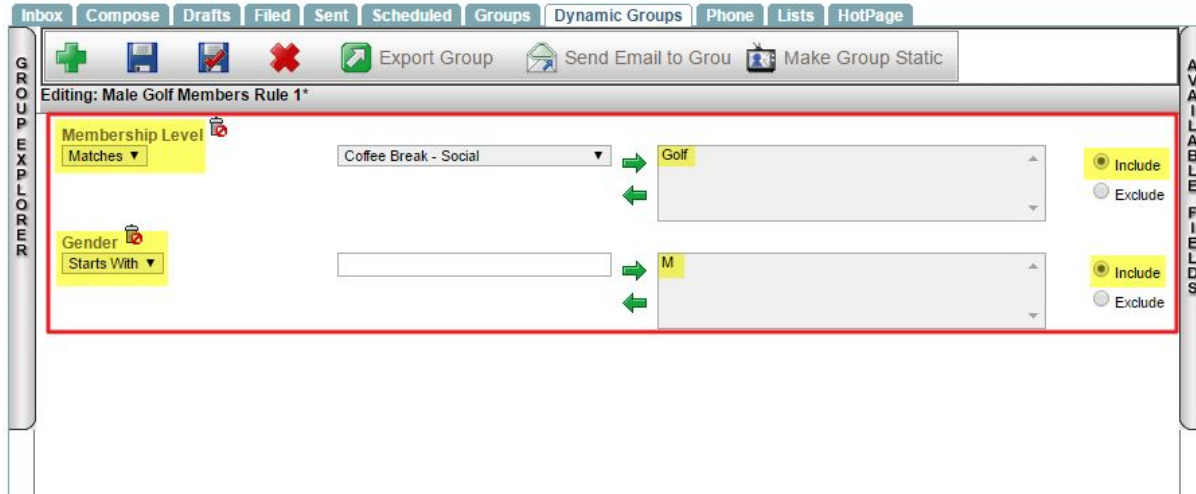


Next, open the **Available Fields** tab by clicking on it, which will list all applicable areas from the **Directory** and **accounting system**.



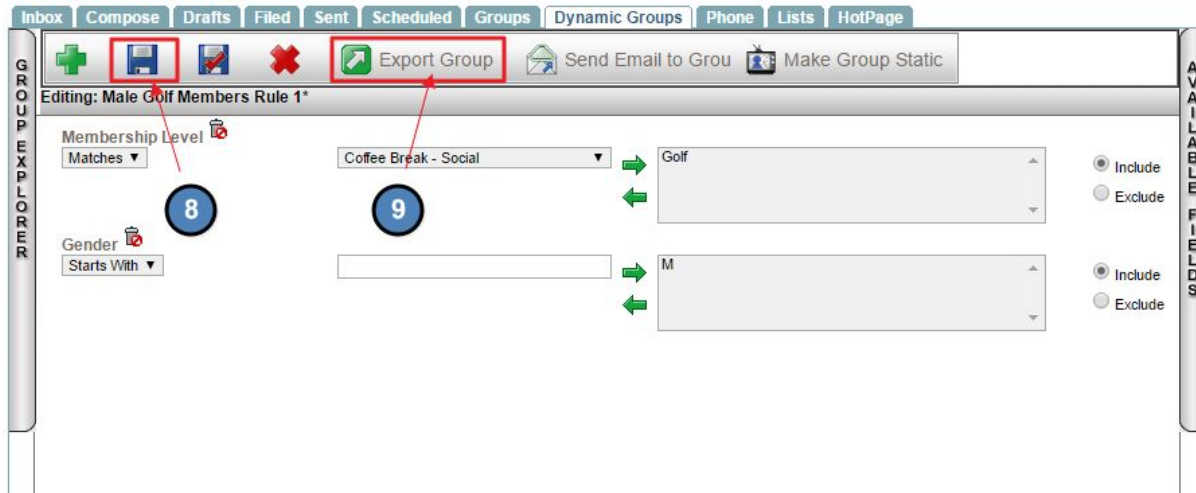
Choose the appropriate rules needed by dragging them to the center of the interface. Once all rules are added your screen should display the rules in the center of the **Dynamic Group Interface**.

DYNAMIC GROUPS

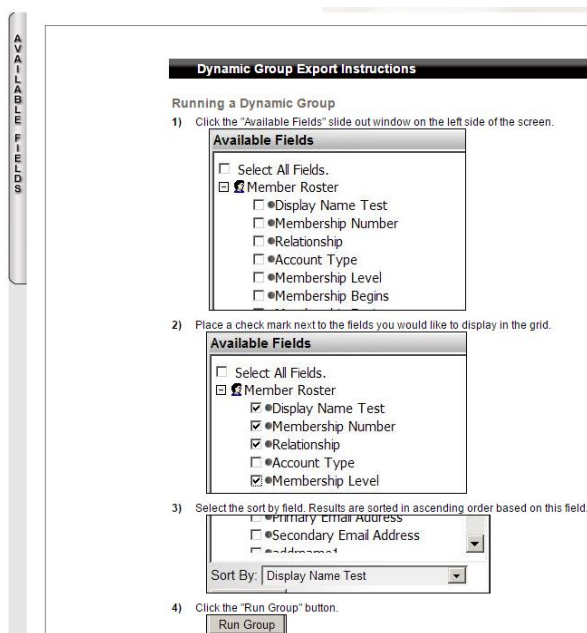


Once all rules have been added, **click the Save** button and then **Export Group** to verify the right members were added.

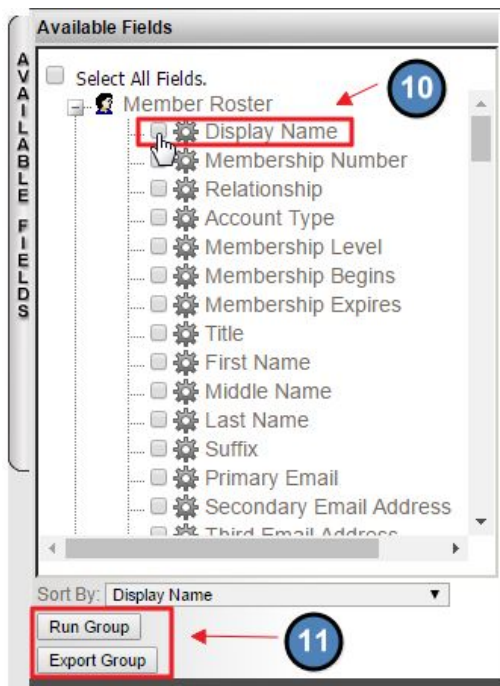
DYNAMIC GROUPS



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**.



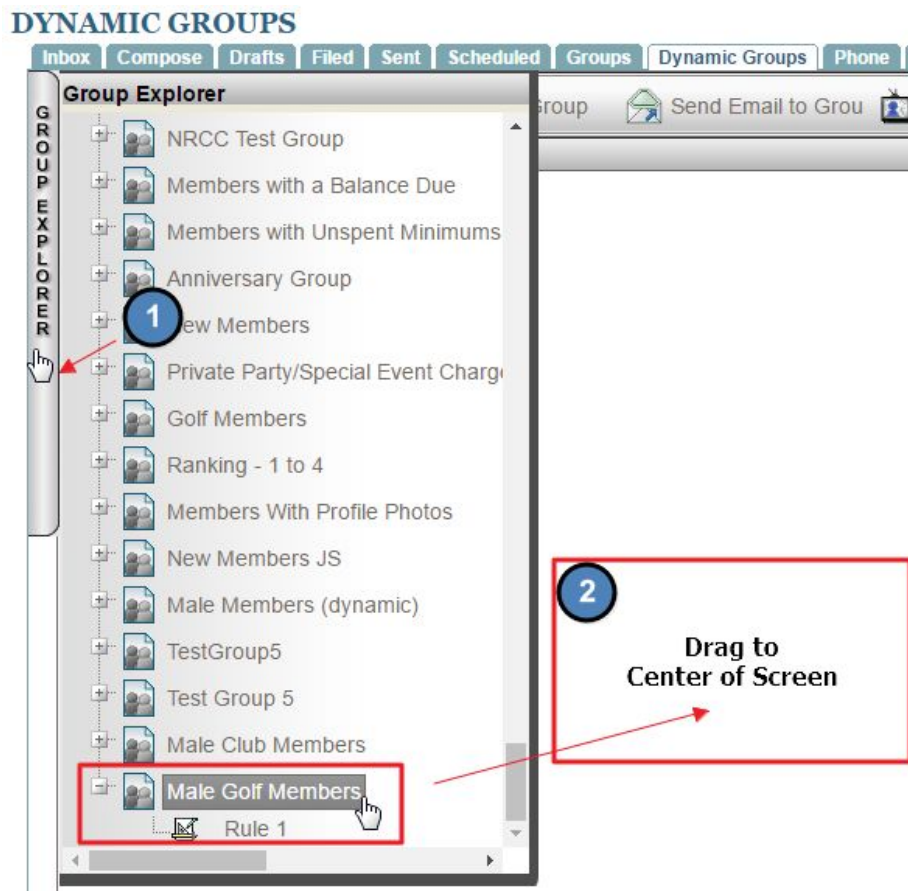
- **Run** will allow you to review the results in the browser.
- **Export to CSV** will create a CSV export. This is especially useful for off-site data entry or tracking.

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

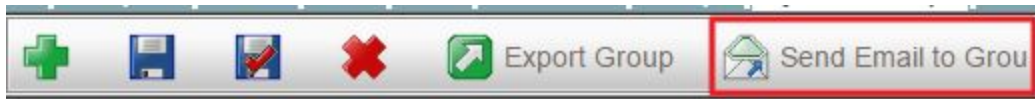
Emailing Dynamic Groups

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.

INBOX

Inbox | **Compose** | **Drafts** | **Filed** | **Sent** | **Scheduled** | **Groups** | **Dynamic Groups**

[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	Male Golf Members
Mailing Lists	<Click to Add Mailing Lists>
Events	<Click to Add Events>

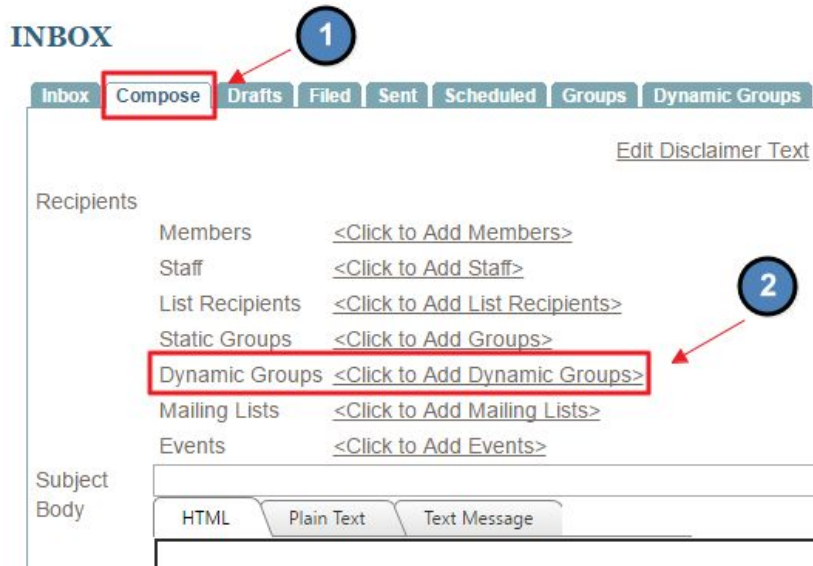
Subject

Body

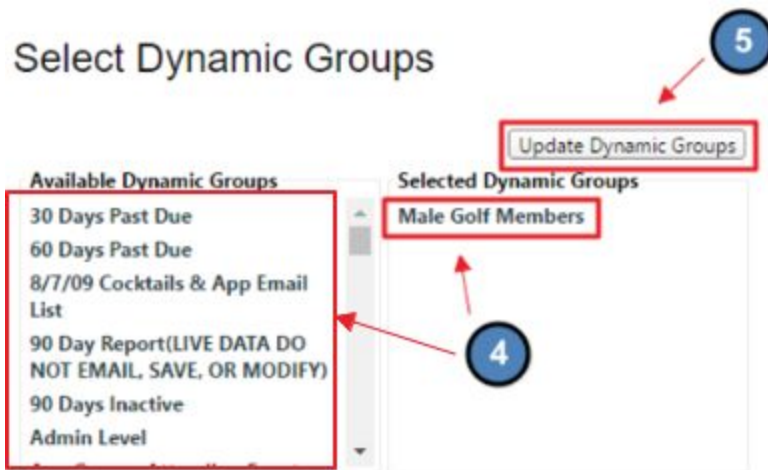
HTML | Plain Text | Text Message

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.