



Marketing Module

(Applies to Office Clients w/o CE Website Only)

2017 - Spring Edition

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Overview

Note: This Module should only be used by Clubs without a Clubessential Website.

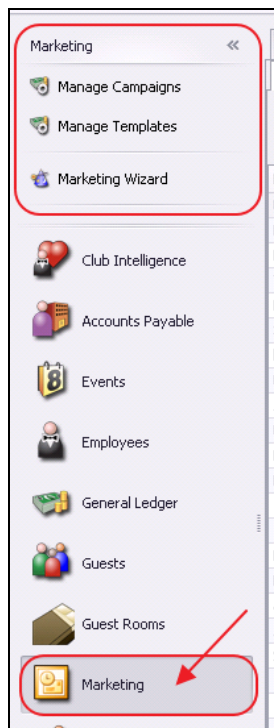
For Office Clients who do not have a Clubessential Website, the Marketing Module allows clubs to communicate with their members via email or text messages. Emails can be sent to all members, specific members using notification types, filter options on the member grid or by using the report feature. Text messages can also be sent using the marketing wizard. The Marketing Wizard option can be used to complete all the steps necessary to create a marketing email.

Use Case(s)

- A Club would like to notify Members of an upcoming Event.
- A Club would like to send out a message targeted to all Delinquent Members.

Accessing the Tool

The Marketing Module can be accessed by selecting **Marketing** on the user menu. The module opens on the **Manage Campaigns Grid**.

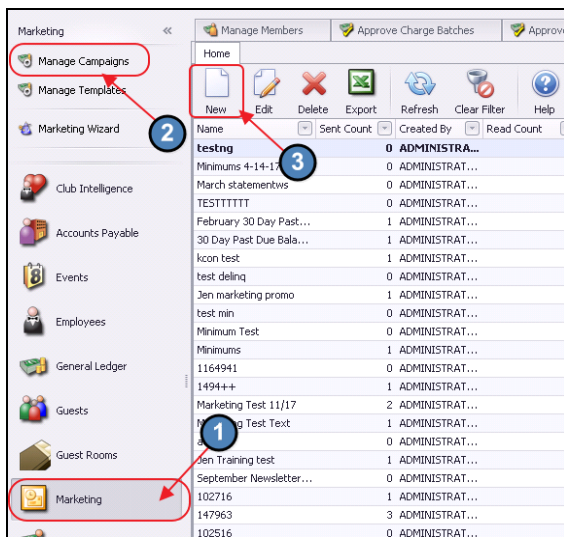


Manage Campaigns

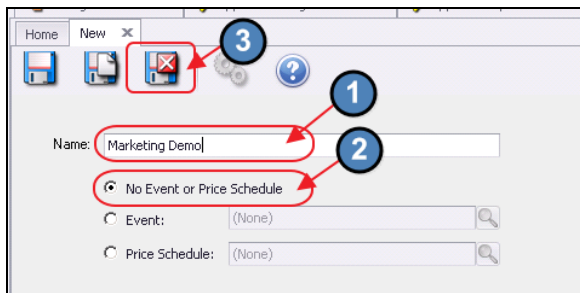
This portion of the Marketing Module allows you to set up campaigns to track email statistics such as how many emails were sent and read. To ensure statistics and data associated with the campaign are accurate, a Campaign should be utilized only once. Administrators can create a new campaign in this section or 'on the fly' in the Marketing wizard.

Note: The Manage Campaigns Grid will display previous email blast statistics.

To create a new Campaign, in the **Marketing Module**, choose **Manage Campaigns**, and click the **New** icon.

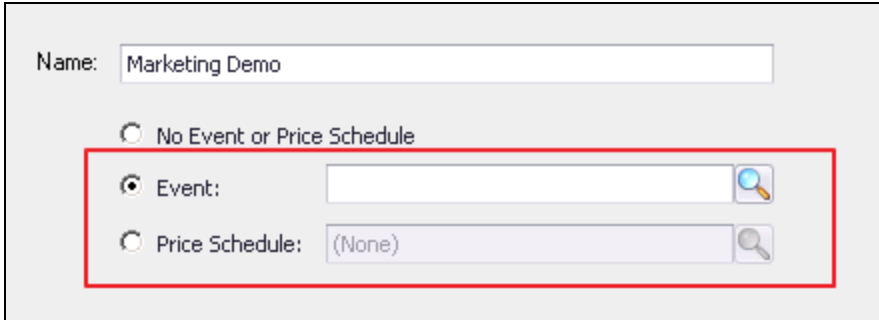


Then,



- 1) **Name** the campaign.
- 2) Leave the default setting for the option: **No event or price schedule**.
- 3) Click **Save and Close**.

Note: To link a campaign to an Event or a Price Schedule, put a check on the option you want, and then click the Search icon to search for the respective Event or schedule.

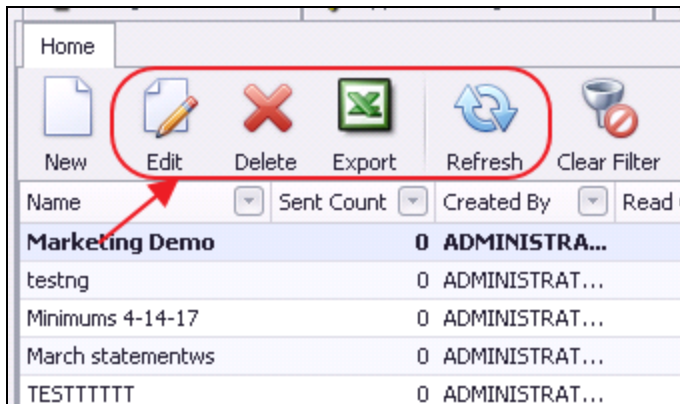


Event: Use when linking to an event from the Office Calendar into the campaign.

Price Schedule: Use when linking the campaign to a price schedule.

(See Coupon Guide for more information. For example, use when sending a birthday coupon to select Member(s) to have coupon show up in the POS).

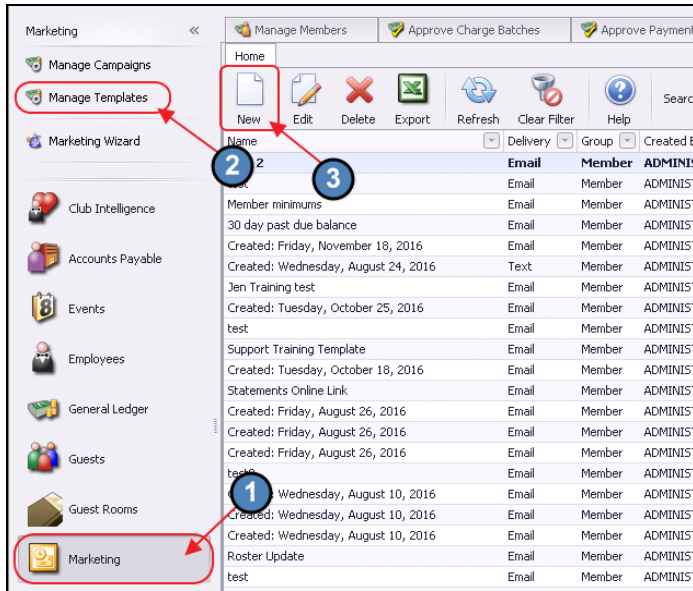
Once the Campaign has been created, you will then be able to **Edit, Delete, Export** to Excel or **Refresh** the campaign in the grid.



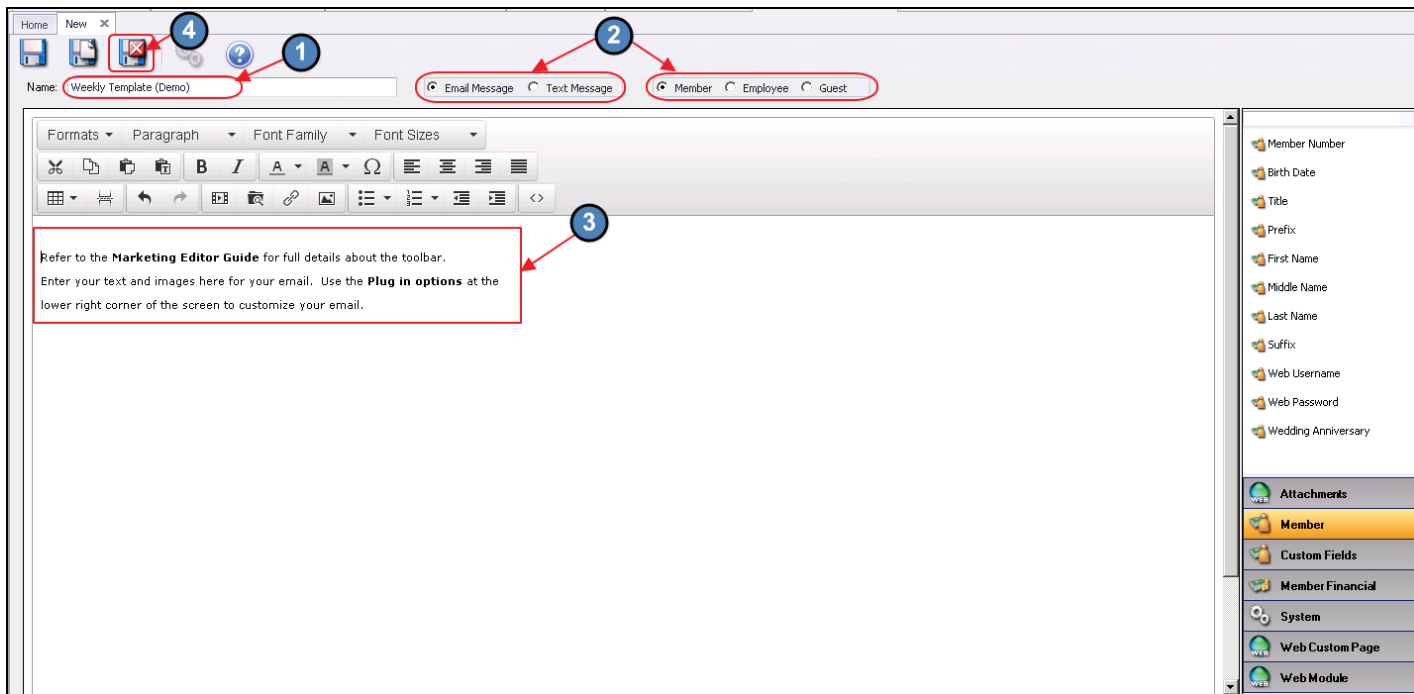
Manage Templates

Create templates to format the body of the email. Templates can be used repeatedly; changing the information as needed. For more information on the editor toolbar within the Template, see the appropriate **Editor Guide** (CS Web - Classic Editor (Old Editor), or Paycloud - Hosted (New Editor)). In the marketing template, there are additional plug-in options on the right of the screen. These options allow you to customize information in the template such as member information, financial information, and attach documents. Templates can be created ahead of time or 'on the fly' in the Marketing Wizard.

In the **Marketing Module**, choose **Manage Campaigns**, and click the **New** icon.

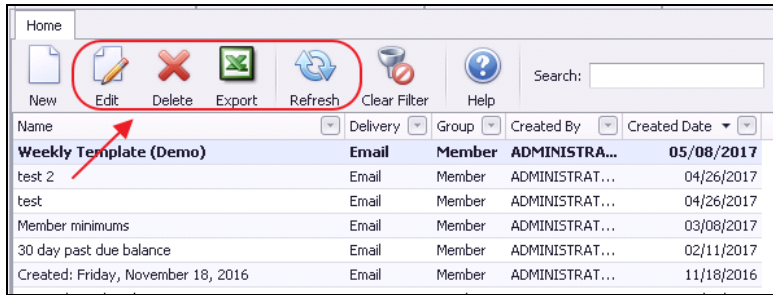


Then,



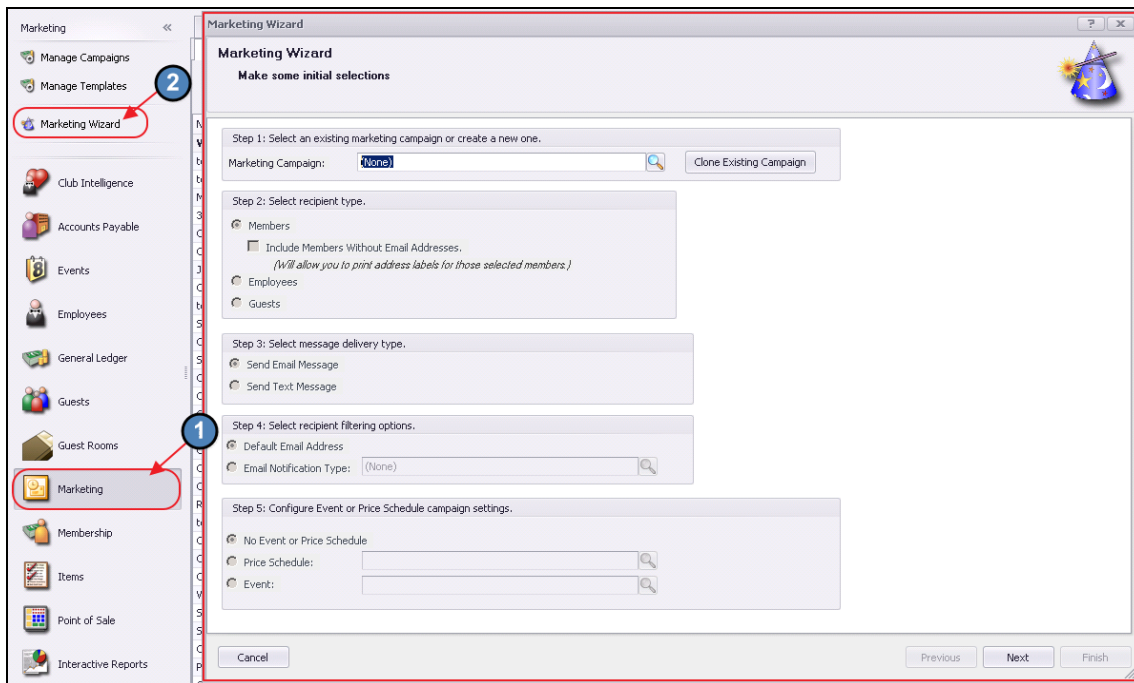
- 1) **Name** the Template.
- 2) Check the default setting for **Email Message** and **Member**.
- 3) Enter text and images into the body of the editor.
- 4) Click **Save and Close**.

Once the Template has been created, you will then be able to **Edit, Delete, Export** to Excel or **Refresh** the template in the grid.



Marketing Wizard

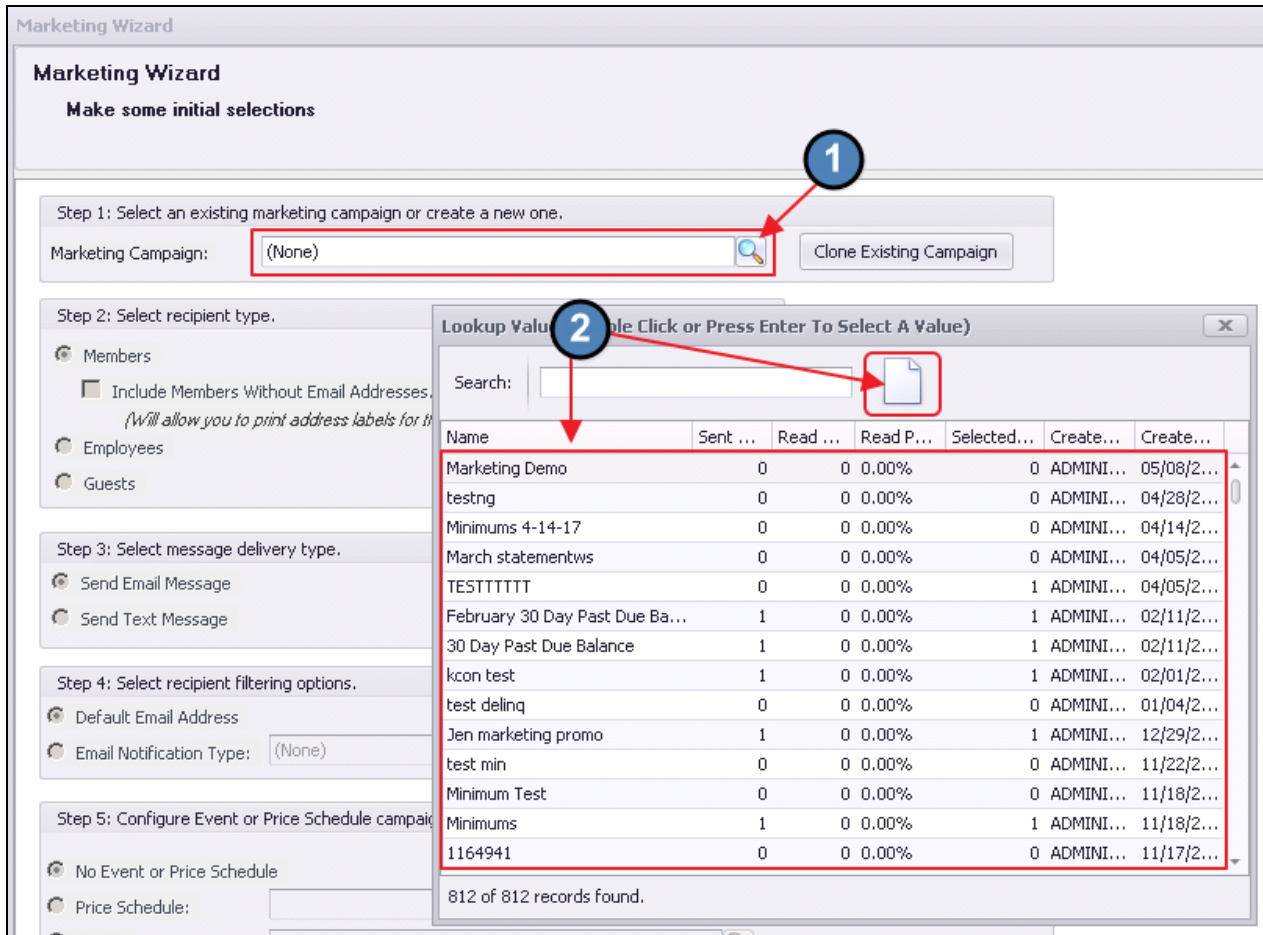
The Marketing Wizard pulls all the steps into one simple process to create and send an email. You may go directly to this step and bypass creating a campaign and template separately. New campaigns and templates may be created in the Wizard or you may select an existing one that has already been created.



Marketing Wizard - Screen 1 (Initial Selections)


Step 1 - Choose an existing Campaign, or create a new one.

- To **choose an existing** campaign, click on the search icon, and then select an existing campaign from the list. Remember, however, that **a campaign should only be used once** (to preserve statistical and data integrity). If you would like to reuse functionality of an existing campaign, use the cloning feature discussed below.
- To **create a new** campaign, click on the search icon, and then click on the New icon (sheet of paper).



Marketing Wizard
Make some initial selections

Step 1: Select an existing marketing campaign or create a new one.

Marketing Campaign: (None)  Clone Existing Campaign

Step 2: Select recipient type.

- Members
 - Include Members Without Email Addresses. (Will allow you to print address labels for them)
- Employees
- Guests

Step 3: Select message delivery type.

- Send Email Message
- Send Text Message

Step 4: Select recipient filtering options.

- Default Email Address
- Email Notification Type: (None)

Step 5: Configure Event or Price Schedule campaign.

- No Event or Price Schedule
- Price Schedule:

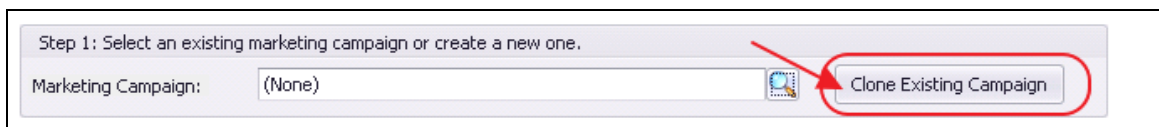
Lookup Value Multiple Click or Press Enter To Select A Value

Search:


Name	Sent ...	Read ...	Read P...	Selected...	Create...	Create...
Marketing Demo	0	0	0.00%	0	ADMINI...	05/08/2...
testng	0	0	0.00%	0	ADMINI...	04/28/2...
Minimums 4-14-17	0	0	0.00%	0	ADMINI...	04/14/2...
March statementws	0	0	0.00%	0	ADMINI...	04/05/2...
TESTTTTTT	0	0	0.00%	1	ADMINI...	04/05/2...
February 30 Day Past Due Ba...	1	0	0.00%	1	ADMINI...	02/11/2...
30 Day Past Due Balance	1	0	0.00%	1	ADMINI...	02/11/2...
kcon test	1	0	0.00%	1	ADMINI...	02/01/2...
test delinq	0	0	0.00%	0	ADMINI...	01/04/2...
Jen marketing promo	1	0	0.00%	1	ADMINI...	12/29/2...
test min	0	0	0.00%	0	ADMINI...	11/22/2...
Minimum Test	0	0	0.00%	0	ADMINI...	11/18/2...
Minimums	1	0	0.00%	1	ADMINI...	11/18/2...
1164941	0	0	0.00%	0	ADMINI...	11/17/2...

812 of 812 records found.

Note: As an alternative to the above, you can clone an entire campaign, by choosing the option below. Cloning keeps all the criteria the same for your email, but allows you to individually track the stats as if it was a new campaign, and allow you to provide the campaign a new name. This is the preferred method when you would like to reuse the functionality within an existing campaign.



Step 1: Select an existing marketing campaign or create a new one.

Marketing Campaign: (None)  Clone Existing Campaign

Step 2 - Select recipient type: Members, Employees, or Guests.



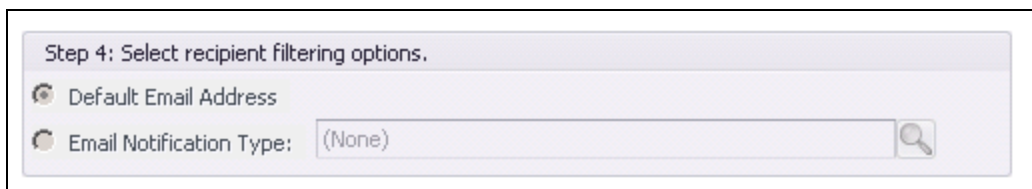
- **Members** - This will default to the member grid on the next screen. There is an option to Include Members without email addresses. Placing a checkmark in this box will prompt you at the end of the wizard to select a printer to print labels for members who do not have an email on file.
- **Employees** - This will default to the employee grid on the next screen.
- **Guests** - This will default to the guest database.

Step 3 - Select message delivery type: Email or Text.



- **Email** - Sends your message via email from the system.
- **Text** - Sends your email message as a text. In order for this to work, members must have valid mobile phone number and carrier information listed in their member profile.

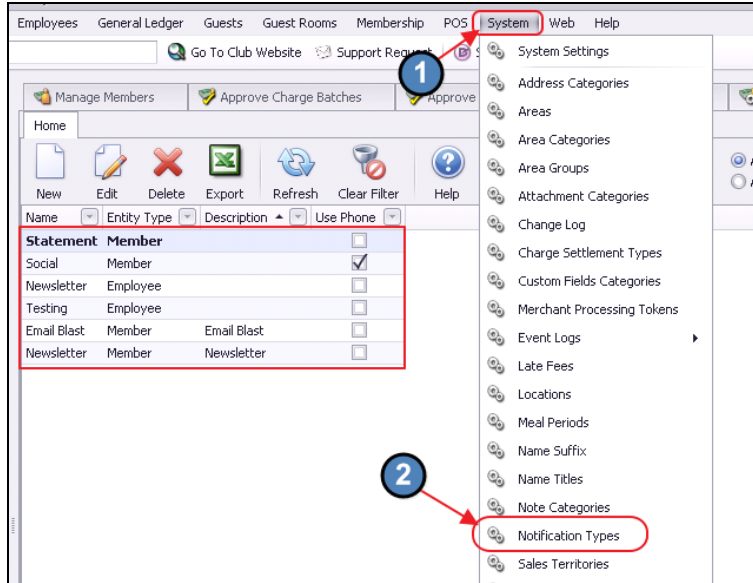
Step 4 - Select recipient filtering options: Default or Other.



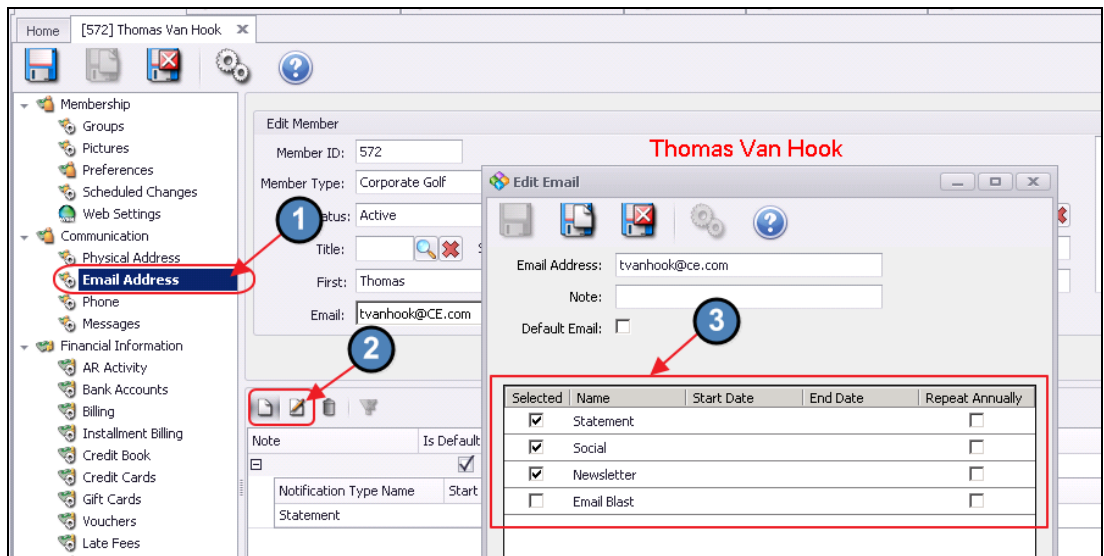
- **Default** - The system will send to the members default email address on file. Only 1 email can be set as the default per member.
- **Notification Type** - Click the Search icon to view/select the notification type. Using the Notification Type option will only send to members who have flagged their email on file for that specific notification. Members that have multiple email addresses on file and

have them flagged for the same notification type will receive duplicate emails. When you view the member grid on the next screen, only the members who are flagged for the selected notification type will have a check mark next to their name.

Note: Notification Types can be set up under **System, Notification Types**.




An Admin can flag a member for a notification type such as **Newsletter, Social**, etc on the email tab in the member's record.




Step 5 - Configure Event or Price Schedule campaign settings: None, Price Schedule, or Event.

Step 5: Configure Event or Price Schedule campaign settings.

No Event or Price Schedule

Price Schedule: 

Event: 

- **No Event or Price Schedule** - This is the option typically selected; it is the default.
- **Price Schedule** - Click the Search icon to select a price schedule to link to the email (Ex: coupon for a discount).
- **Event** - Click the Search icon to select an event from your calendar in CMA to pull that event information into the body of the email. *Only works with the CMA calendar.

Click **Next** to proceed.

Cancel Previous **Next** Finish

Marketing Wizard - Screen 2 (Recipient Selection)

This screen allows you to target specific recipients. If you selected the **default email address** option in **Step 4**, **all members** with default emails will be checked. If you selected **Email Notification type**, only members who are flagged for that notification will have a check by their name.

Marketing Wizard

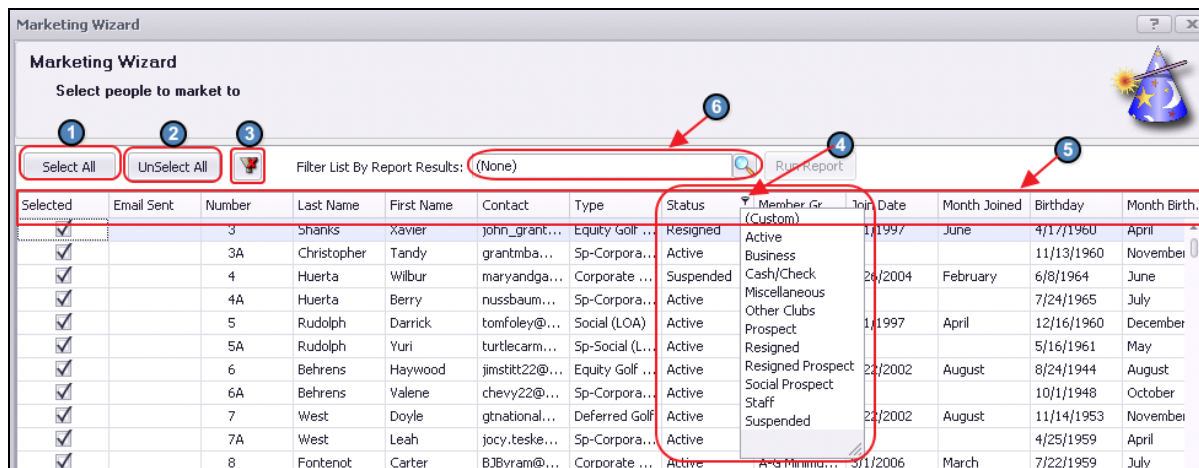
Select people to market to

Select All Unselect All Filter List by Report Results: (None) Run Report

Selected	Email Sent	Number	Last Name	First Name	Contact	Type	Status	Member Gr...	Join Date	Month Joined	Birthday	Month Birth
<input checked="" type="checkbox"/>		3	Shanks	Xavier	john_grant...	Equity Golf ...	Resigned	A-G Minimu...	6/1/1997	June	4/17/1960	April
<input checked="" type="checkbox"/>		3A	Christopher	Tandy	grantha...	Sp-Corpora...	Active	9 Hole Gro...			11/13/1960	November
<input checked="" type="checkbox"/>		4	Huerta	Wilbur	maryandja...	Corporate ...	Suspended	All Primary ...	2/26/2004	February	6/8/1964	June
<input checked="" type="checkbox"/>		4A	Huerta	Berry	rustbaum...	Sp-Corpora...	Active	18 Hole Gr...			7/24/1965	July
<input checked="" type="checkbox"/>		5	Rudolph	Darrick	tonifley@...	Social (DCA)	Active	A-G Minimu...	4/1/1997	April	12/18/1960	December
<input checked="" type="checkbox"/>		5A	Rudolph	Vari	turticam...	Sp-Social G...	Active	cathys test...			5/16/1961	May
<input checked="" type="checkbox"/>		6	Behrens	Haywood	jmst822@...	Equity Golf ...	Active	All Primary ...	8/22/2002	August	8/24/1944	August
<input checked="" type="checkbox"/>		6A	Behrens	Valene	chery22@...	Sp-Corpora...	Active	All Female...			10/1/1948	October
<input checked="" type="checkbox"/>		7	West	Doyle	gtrnational...	Deferred Golf	Active	All Primary ...	8/22/2002	August	11/14/1953	November
<input checked="" type="checkbox"/>		7A	West	Leah	joey.tesla...	Sp-Corpora...	Active	9 Hole Gro...			4/26/1969	April
<input checked="" type="checkbox"/>		8	Funkenot	Carter	B.Brynam@...	Corporate ...	Active	A-G Minimu...	3/1/2006	March	7/22/1959	July
<input checked="" type="checkbox"/>		9	Walaquez	Shon	scott@glou...	Corporate ...	Active	A-G Minimu...	4/28/2008	April	1/4/1965	January
<input checked="" type="checkbox"/>		9A	Walaquez	Jenelle	layhansam...	Sp-Corpora...	Active	All Female...			12/30/1964	December
<input checked="" type="checkbox"/>		10	Overstreet	Santiago	jzunst@...	Equity Golf ...	Active	All Primary ...	4/17/1997	April	9/6/1965	September
<input checked="" type="checkbox"/>		11A	Monkes	Patsy	patjensen...	Sp-Corpora...	Active	18 Hole Gr...			9/27/1953	September
<input checked="" type="checkbox"/>		12	Walters	Alex	pieker.h.via...	Corporate ...	Active	9 Hole Gro...	8/3/2001	August	7/18/1971	July
<input checked="" type="checkbox"/>		12A	Walters	Giusseppe	pieker.h.via...	Sp-Corpora...	Active	cathys test...			9/27/1972	September
<input checked="" type="checkbox"/>		14	Bright	Parsha	igand@707...	Corporate ...	Active	All Female...			11/21/1961	November
<input checked="" type="checkbox"/>		14A	Bright	Aaron	petertaub...	Sp-Corpora...	Active	All Primary ...	7/6/2007	July	6/18/1950	June
<input checked="" type="checkbox"/>		15	Burk	Gilberto	thomas.dy...	Corporate ...	Active	A-G Minimu...	11/1/1997	November	10/1/1949	October
<input checked="" type="checkbox"/>		16A	McCloud	Repernia	carolvanla...	Sp-Deferre...	Active	All Female...			12/29/1970	December
<input checked="" type="checkbox"/>		17	Hightower	Issac	larson.scot...	Deferred Golf	Active	All Primary ...	4/24/2008	April	7/9/1965	July
<input checked="" type="checkbox"/>		17A	Hightower	Adrian	larson.tara...	Sp-Deferre...	Active	All Female...			8/14/1975	August
<input checked="" type="checkbox"/>		18	Burch	Neil	onea@glou...	Corporate ...	Active	All Primary ...	11/1/1989	November	6/23/1953	June
<input checked="" type="checkbox"/>		18A	Burch	Monica	onea@glou...	Corporate ...	Active	All Female...			10/1/1963	October

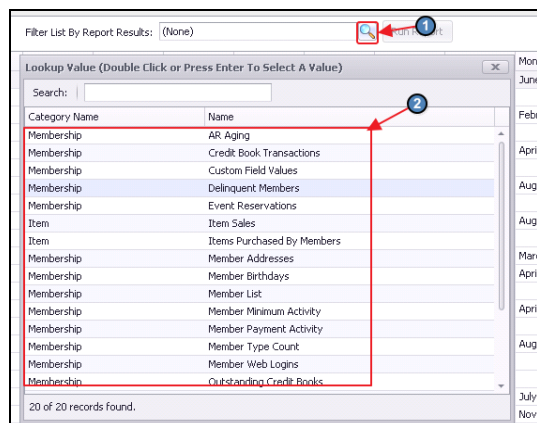
Cancel Previous Next Finish

There are additional **Filter** options on this screen as well.

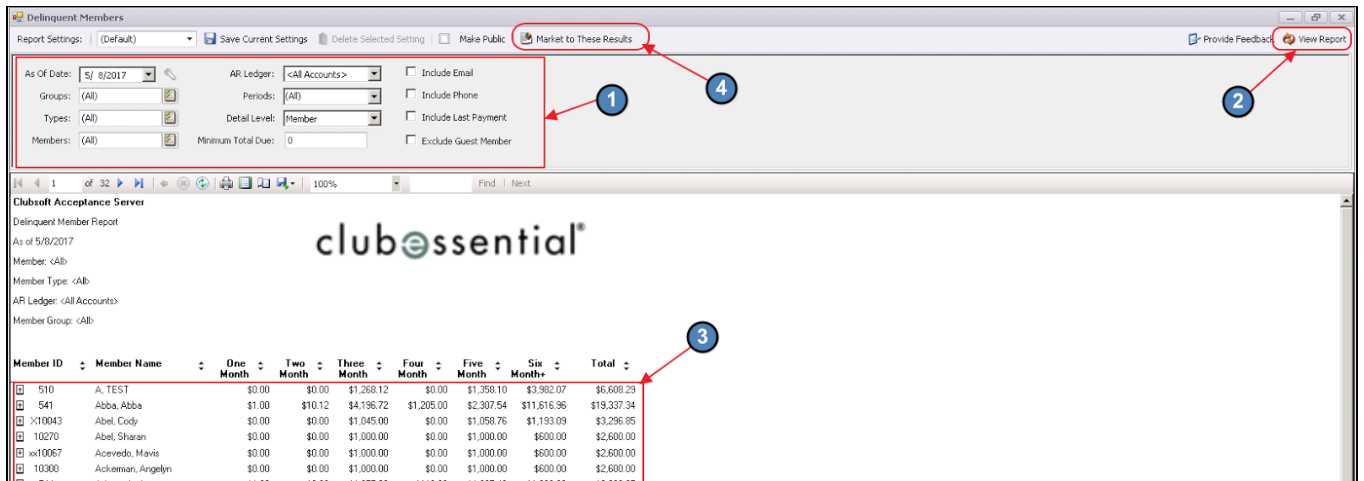


- 1) **Select All** - This will place a checkmark next to each members name in the grid.
- 2) **Unselect All** - This will clear the grid of all check marks, giving you a fresh start.
- 3) **Clear Filter icon** - This will clear any filters that have been applied.
- 4) **Column Filters** - Each column has a filter icon that will provide filter options. Hover over column to view.

Example: Click the filter icon on the Status column and highlight the status you want to include in the email blast. See [Grids](#) guide for more information on using grids.
- 5) **Sorting** - Click on any column heading to sort by that column.
- 6) **Filter List By Report Results** - Uses reports to help target specific members based on spending, birthdays, and many other criterion.
 - Click the **Search** icon to view a list of available reports, and then select the desired report.



- Once the report loads, set the appropriate criteria, and click **View Report**. Ensure results returned are desired list for populating the recipients of the Marketing effort. Once list is proper, click **Market to These Results**.



Delinquent Members

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public **Market to These Results** Provide Feedback **View Report**

As of Date: 5/ 8/2017 AR Ledger: <All Accounts> Include Email
 Groups: (All) Periods: (All) Include Phone
 Types: (All) Detail Level: Member Include Last Payment
 Members: (All) Minimum Total Due: 0 Exclude Guest Member

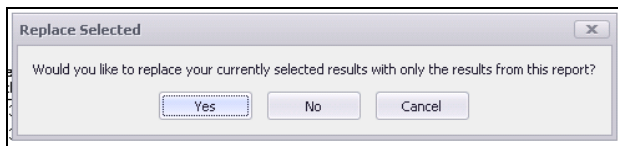
Clubsoft Acceptance Server

Delinquent Member Report

As of 5/8/2017
 Member: <All>
 Member Type: <All>
 AR Ledger: <All Accounts>
 Member Group: <All>

Member ID	Member Name	One Month	Two Month	Three Month	Four Month	Five Month	Six Month	Total
510	A. TEST	\$0.00	\$0.00	\$1,258.12	\$0.00	\$1,358.10	\$3,382.07	\$6,608.29
541	Abba,Abba	\$1.00	\$10.12	\$4,136.72	\$1,205.00	\$2,307.54	\$11,616.36	\$19,337.34
x10043	Abel, Cody	\$0.00	\$0.00	\$1,045.00	\$0.00	\$1,358.76	\$1,153.03	\$3,296.85
10270	Abel, Sharan	\$0.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$500.00	\$2,600.00
x10067	Acevedo, Maris	\$0.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$500.00	\$2,600.00
10300	Ackerman, Angelyn	\$0.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$500.00	\$2,600.00

The following popup will appear:



- Click **Yes** to replace current list of Members checked, with Members from the report results.
- Click **No** to append the Members appearing on the report to the existing list of Members.

Once Members have been selected, click **Next** to proceed.

Marketing Wizard

Marketing Wizard
Select people to market to

Select All UnSelect All Filter List By Report Results: Delinquent Members Run Report

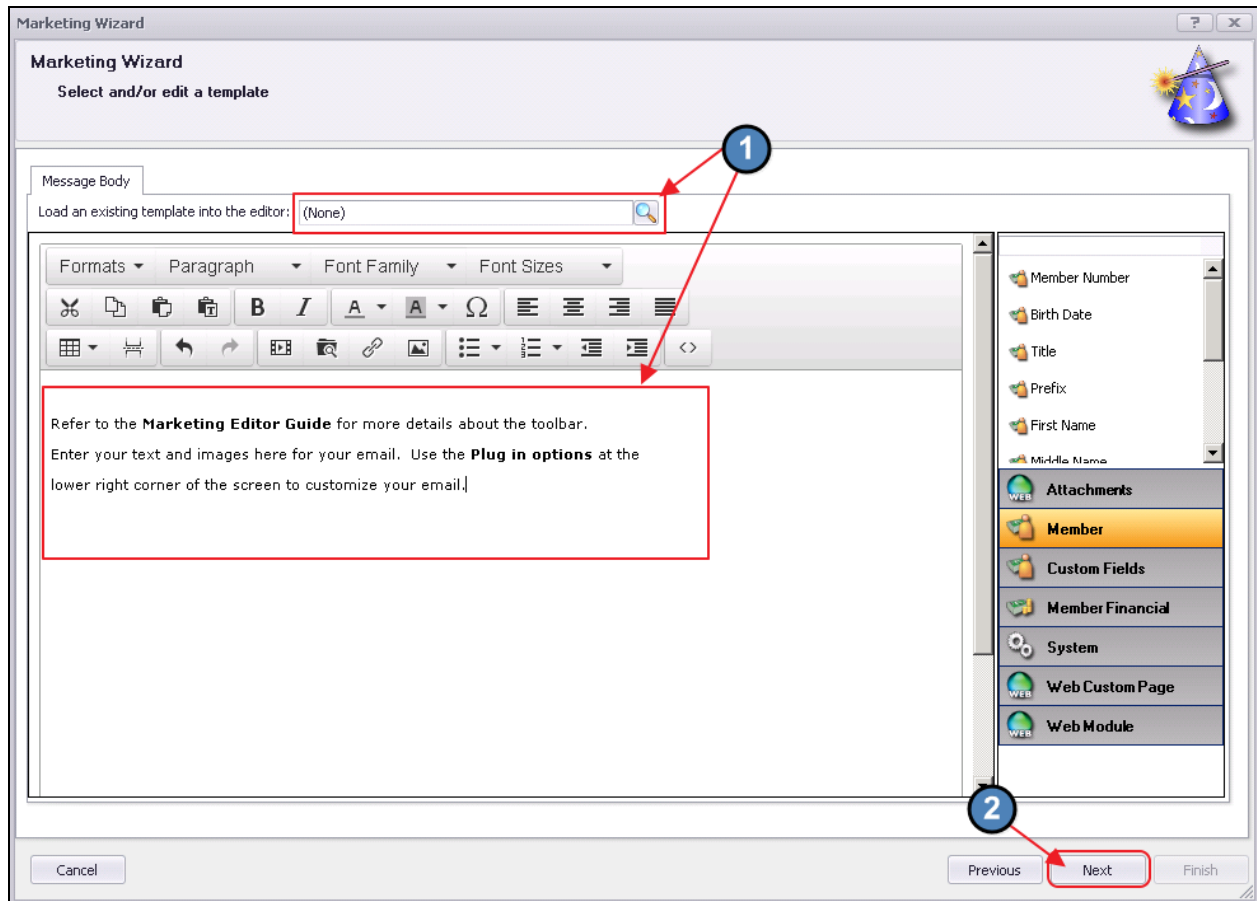
Selected	Email Sent	Number	Last Name	First Name	Contact	Type	Status	Member Gr...	Join Date	Month Joined	Birthdate	Month Birth...
<input checked="" type="checkbox"/>		3	Shanks	Xavier	john_grant...	Equity Golf ...	Resigned	A-G Minimu...	6/1/1997	June	4/17/1960	April
<input type="checkbox"/>		3A	Christopher	Tandy	grantmba...	Sp-Corpora...	Active	9 Hole Gro...			11/13/1960	November
<input checked="" type="checkbox"/>		4	Huerta	Wilbur	maryandga...	Corporate ...	Suspended	All Primary ...	2/26/2004	February	6/8/1964	June
<input type="checkbox"/>		4A	Huerta	Berry	nussbaum...	Sp-Corpora...	Active	18 Hole Gr...			7/24/1965	July
<input checked="" type="checkbox"/>		5	Rudolph	Darrick	tomfoley@...	Social (LOA)	Active	A-G Minimu...	4/1/1997	April	12/16/1960	December
<input type="checkbox"/>		5A	Rudolph	Yuri	turtlecar...	Sp-Social (L...	Active	cathys test...			5/16/1961	May
<input checked="" type="checkbox"/>		6	Behrens	Haywood	jimstitt22@...	Equity Golf ...	Active	All Primary ...	8/22/2002	August	8/24/1944	August
<input type="checkbox"/>		6A	Behrens	Valene	chevy22@...	Sp-Corpora...	Active	All females,...			10/1/1948	October
<input checked="" type="checkbox"/>		7	West	Doyle	gtnational...	Deferred Golf	Active	All Primary ...	8/22/2002	August	11/14/1953	November
<input type="checkbox"/>		7A	West	Leah	jocy.teske...	Sp-Corpora...	Active	9 Hole Gro...			4/25/1959	April
<input checked="" type="checkbox"/>		8	Fontenot	Carter	BjByram@...	Corporate ...	Active	A-G Minimu...	3/1/2006	March	7/22/1959	July
<input checked="" type="checkbox"/>		9	Velazquez	Shon	scottc@clu...	Corporate ...	Active	A-G Minimu...	4/28/2008	April	1/4/1965	January
<input type="checkbox"/>		9A	Velazquez	Jenelle	tayhansam...	Sp-Corpora...	Active	All females,...			12/30/1964	December
<input checked="" type="checkbox"/>		10	Overstreet	Santiago	jhzust@cl...	Equity Golf ...	Active	All Primary ...	4/17/1997	April	9/6/1955	Septembe
<input type="checkbox"/>		11A	Montes	Patsy	patjensen...	Sp-Corpora...	Active	18 Hole Gr...			9/27/1953	Septembe
<input checked="" type="checkbox"/>		12	Walters	Alex	pieter.h.va...	Corporate ...	Active	9 Hole Gro...	8/3/2001	August	7/18/1971	July
<input type="checkbox"/>		12A	Walters	Giuseppe	pieter.h.va...	Sp-Corpora...	Active	cathys test...			9/27/1972	Septembe
<input checked="" type="checkbox"/>		14	Bright	Porsha	igamble787...	Corporate ...	Active	All females,...			11/3/1951	November
<input type="checkbox"/>		14A	Bright	Aaron	petertaube...	Sp-Corpora...	Active	All Primary ...	7/6/2007	July	6/18/1950	June
<input checked="" type="checkbox"/>		15	Burk	Gilberto	thomas.dy...	Corporate ...	Active	A-G Minimu...	11/1/1997	November	10/11/1949	October
<input type="checkbox"/>		16A	Mccloud	Regenia	carolvanloa...	Sp-Deferre...	Active	All females,...			12/29/1970	December
<input checked="" type="checkbox"/>		17	Hightower	Issac	larson.scot...	Deferred Golf	Active	All Primary ...	4/24/2008	April	7/9/1965	July
<input type="checkbox"/>		17A	Hightower	Adrian	larson.tara...	Sp-Deferre...	Active	All females,...			8/14/1975	August
<input checked="" type="checkbox"/>		18	Bunch	Mel	cmozz@clu...	Corporate ...	Active	All Primary ...	11/1/1989	November	6/23/1953	June
<input type="checkbox"/>		18A	Bunch	Mary	clmazz@clu...	Sp-Corpora...	Active	All females...			2/4/1953	February

Cancel Previous Next Finish

Marketing Wizard - Screen 3 (Template Selection)

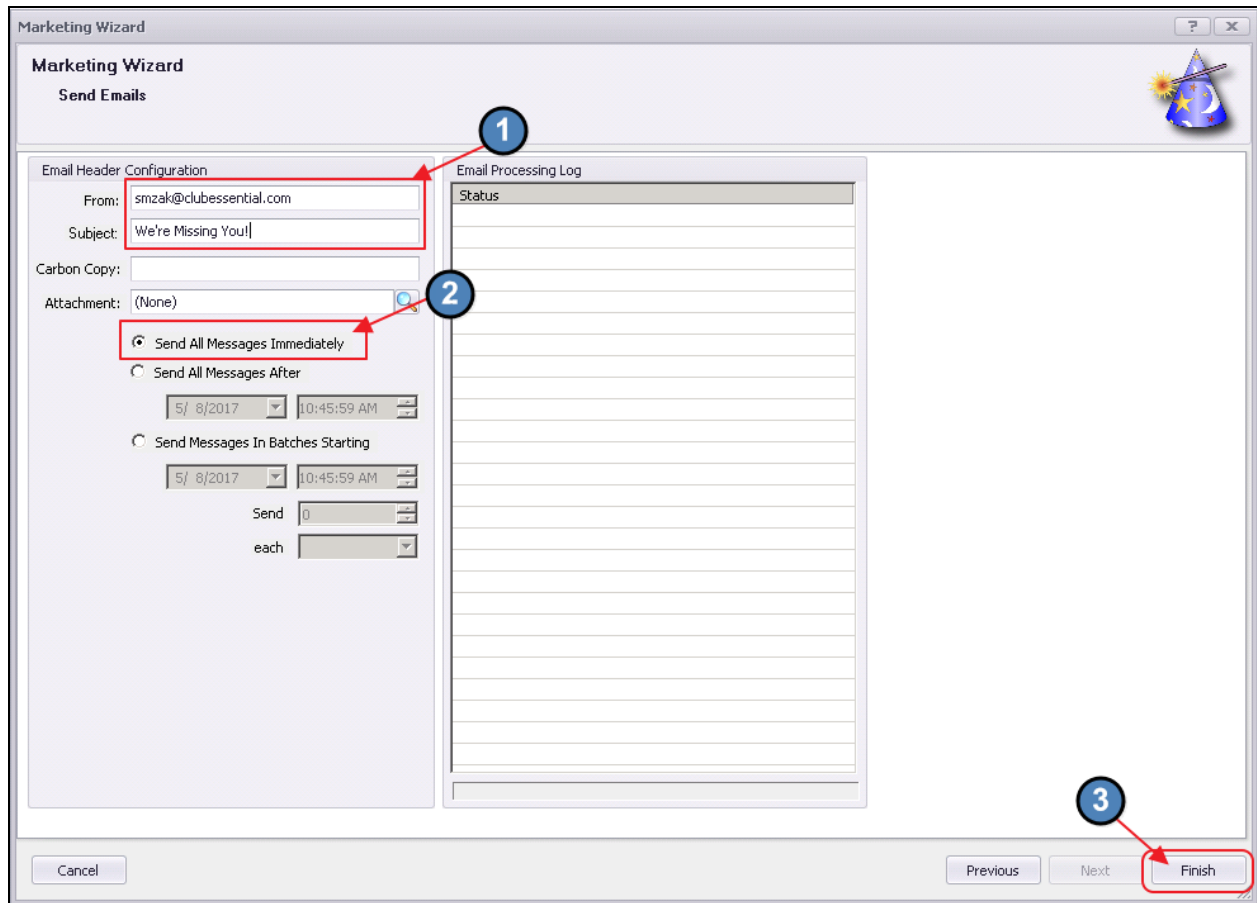
Select an existing template by clicking the Search icon OR create/edit the blank template by adding text into the editor area. Refer to the Marketing Editor Guide for details about the toolbar and the plug in options in the editor.

When finished, click **Next**.



Marketing Wizard - Screen 4 (Email Configuration Screen)

Populate the **From** field or allow to auto-populate based on the email in System settings. Enter a Subject for the email, specify email for carbon copies (optional), add attachments as necessary (optional), and specify Sending preferences. Click **Finish** when complete.

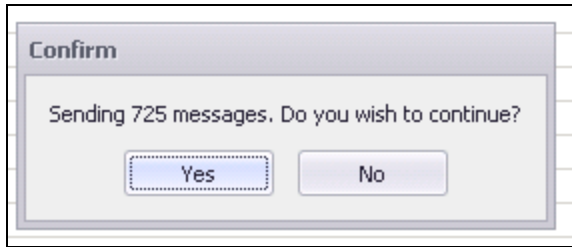


Note: Additional Options on this screen are as follows:

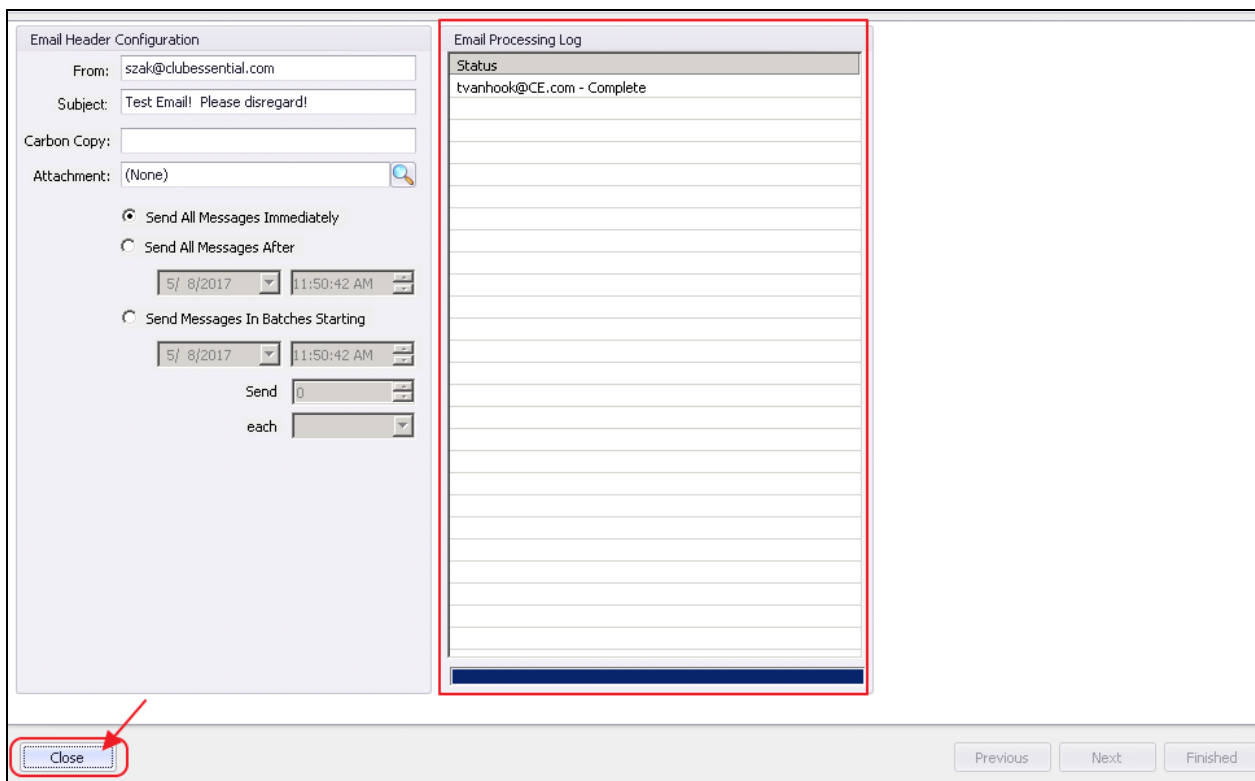
- The **Carbon Copy** field is optional to add a cc to an email.
- The **Attachment field** can be used to attach a document; however it is recommended that you attach documents in the body of the email using the hyperlink tool. Attachments added using this Attachment option will appear at the very bottom of the email.
- **Send All Messages After** option allows you to set a future date/time to send the email. If you need to cancel an email scheduled for a future date/time, you must contact Office support to do this for you.
- **Send Messages in Batches** option allows you to break up when the email goes out and how many emails to send out in a given period of time.

(Clubessential now offers a third party integration called Send Grid. This is an email hosting software with a whitelisted IP address. This will help clients send email and prevent SPAM, and would replace the client email host, resolving issues of email limitations.)

Once **Finish** has been clicked, a confirmation message will appear confirming the number of emails to be sent.



Click **Yes** to continue, or **No** to abort. Messages will be sent. Email Processing Log will update as messages are sent. Click **Close** to exit.



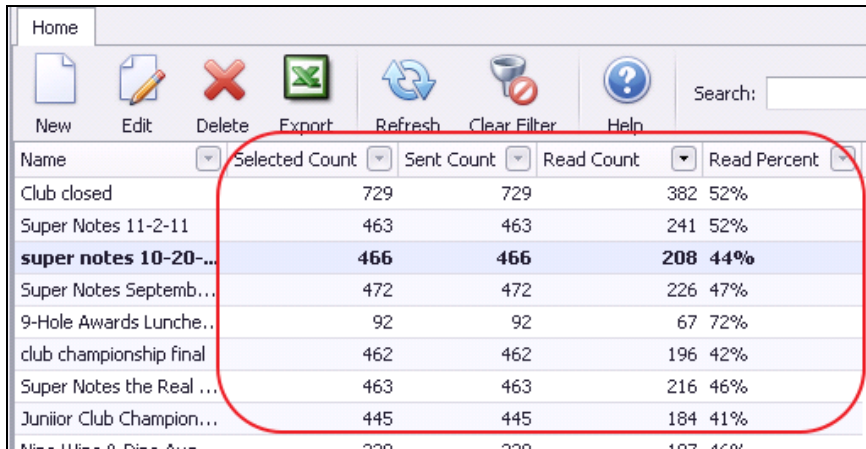
Best Practices

- Ensure Member profiles are up to date with information that will allow Marketing Blasts to be effective.
- Ensure your Blast Emails are targeted to the specific Members who the Message is relevant to increase open/read rates.

Frequently Asked Questions

How can I tell how many emails were read in my blast send?

Review Statistics found in the Manage Campaigns grid. Selected Count, Sent, Read, and Read Percentage information is available here.



Name	Selected Count	Sent Count	Read Count	Read Percent
Club closed	729	729	382	52%
Super Notes 11-2-11	463	463	241	52%
super notes 10-20-...	466	466	208	44%
Super Notes Septemb...	472	472	226	47%
9-Hole Awards Lunche...	92	92	67	72%
club championship final	462	462	196	42%
Super Notes the Real ...	463	463	216	46%
Junior Club Champion...	445	445	184	41%