# **G** 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**.

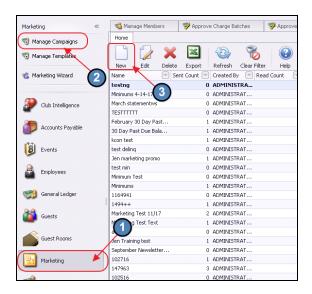


## Manage Campaigns

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.

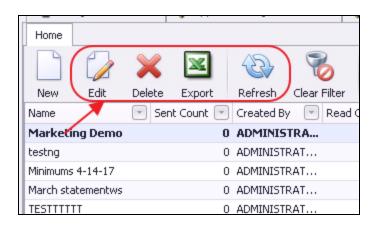
Name:	Marketing Demo			
_	C No Event or Price	e Schedule		-
	Event:			
	O Price Schedule:	(None)	Q	
L				1

**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.



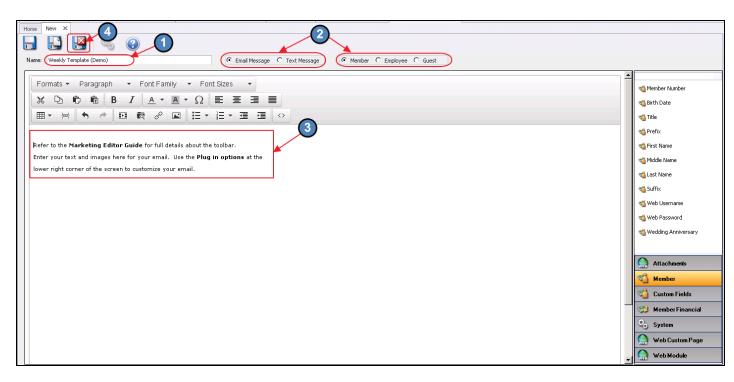
# Manage Templates

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.

Marketing	« 🖏 Manage Members 🌍	Approve Charge B	Batches	🦻 Approv	e Payment	
🖏 Manage Campaigns	Home					
Manage Templates	New Edit Delete E	xport Refresh	Clear Filter	() Help	Searc	
📸 Marketing Wizard	Name		Delivery 💌	Group 💌	Created E	
<b>·</b>			Email	Member	ADMINI	
			Email	Member	ADMINIS	
Club Intelligence	Member minimums		Email	Member	ADMINIS'	
<b>W</b>	30 day past due balance		Email	Member	ADMINIS	
<b>9</b>	Created: Friday, November 18, 2	2016	Email	Member	ADMINIS	
Accounts Payable	Created: Wednesday, August 24	Created: Wednesday, August 24, 2016				
	Jen Training test		Email	Member	ADMINIS	
8 Events	Created: Tuesday, October 25, 2	2016	Email	Member	ADMINIS	
	test		Email	Member	ADMINIS	
San Frankrister	Support Training Template		Email	Member	ADMINIS	
Employees	Created: Tuesday, October 18, 2	Created: Tuesday, October 18, 2016				
	Statements Online Link		Email	Member	ADMINIS	
General Ledger	Created: Friday, August 26, 201	6	Email	Member	ADMINIS	
	Created: Friday, August 26, 201	6	Email	Member	ADMINIS	
Guests	Created: Friday, August 26, 201	6	Email	Member	ADMINIS	
	te		Email	Member	ADMINIS	
	Wednesday, August 10	), 2016	Email	Member	ADMINIS	
Guest Rooms	created: Wednesday, August 10	), 2016	Email	Member	ADMINIS	
_	Created: Wednesday, August 10	), 2016	Email	Member	ADMINIS	
Marketing (	Roster Update		Email	Member	ADMINIS	
<u> </u>	test		Email	Member	ADMINIS	

#### 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.

Home				
	€ 🚯	(?)	Search:	
New Edit Delete Export	Refresh Clear Filter	Help		
Name 🛒	💌 Delivery 💌	Group 💌	Created By 🛛 💌	Created Date 🔻 💌
Weekly Template (Demo)	Email	Member	ADMINISTRA	05/08/2017
test 2	Email	Member	ADMINISTRAT	04/26/2017
test	Email	Member	ADMINISTRAT	04/26/2017
Member minimums	Email	Member	ADMINISTRAT	03/08/2017
30 day past due balance	Email	Member	ADMINISTRAT	02/11/2017
Created: Friday, November 18, 2016	Email	Member	ADMINISTRAT	11/18/2016

# 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 «	Marketing Wizard		X.S
📆 Manage Campaigns	Marketing Wizard		
🕫 Manage Templates 🛛 🚺	Make some initial selections		
Marketing Wizard	Step 1: Select an existing marketing campaign or create a new one.		
	Marketing Campaign: (None)	Clone Existing Campaign	
Club Intelligence			
	Step 2: Select recipient type.		
Accounts Payable	Members		
(A)	Include Members Without Email Addresses.		
Events J	(Will allow you to print address labels for those selected members.)  C Employees		
	C Guests		
Employees S			
	Step 3: Select message delivery type.		
General Ledger	Send Email Message		
Guests G	Send Text Message		
	Step 4: Select recipient filtering options.		
Guest Rooms	© Default Email Address		
	C Email Notification Type: (None)		
Marketing			
	Step 5: Configure Event or Price Schedule campaign settings.		
Membership 6	No Event or Price Schedule		
	C Price Schedule:		
Items C	C Event:		
Point of Sale			
Interactive Reports	Cancel		Previous Next Finish

#### 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).

larketing Wizard							
Make some initial selections							
				`			
				/			
Step 1: Select an existing marketing campaign or o	create a new one.						
Marketing Campaign: (None)		Q	Clone	Existing Ca	ampaign		
Step 2: Select recipient type.	Lookup Valu	or Press Er					
Members		or press Er	iter 10 Se	elect A val	iue)		L
	Search:			P			
Include Members Without Email Addresses. (Will allow you to print address labels for the print addre	•						
Will allow you to print address labers for th							1
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C Employees		Sent 0		Read P 0.00%		Create ADMINI	
<ul> <li>Employees</li> <li>Guests</li> </ul>	Name		0		0		05/08/2
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<ul> <li>Employees</li> <li>Guests</li> <li>Step 3: Select message delivery type.</li> </ul>	Name Marketing Demo testng Minimums 4-14-17	0 0 0	0 0 0	0.00% 0.00% 0.00%	0 0 0	ADMINI ADMINI ADMINI	05/08/2 04/28/2 04/14/2 04/05/2
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<ul> <li>Employees</li> <li>Guests</li> <li>Step 3: Select message delivery type.</li> <li>Send Email Message</li> </ul>	Name Marketing Demo testng Minimums 4-14-17 March statementws TESTTTTT	0 0 0 0	0 0 0 0 0	0.00% 0.00% 0.00% 0.00% 0.00%	0 0 0 0 1 1	ADMINI ADMINI ADMINI ADMINI	05/08/2 04/28/2 04/14/2 04/05/2 04/05/2 02/11/2
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<ul> <li>Employees</li> <li>Guests</li> <li>Step 3: Select message delivery type.</li> <li>Send Email Message</li> <li>Send Text Message</li> <li>Send Text Message</li> <li>Step 4: Select recipient filtering options.</li> <li>Default Email Address</li> </ul>	Name Marketing Demo testng Minimums 4-14-17 March statementws TESTTTTT February 30 Day Past Due Ba 30 Day Past Due Balance kcon test test deling	0 0 0 0 1 1 1 1 0		0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00% 0.00%	0 0 0 1 1 1 1 1 1 0 0	ADMINI ADMINI ADMINI ADMINI ADMINI ADMINI ADMINI ADMINI	05/08/2 04/28/2 04/14/2 04/05/2 04/05/2 02/11/2 02/11/2 02/01/2 01/04/2 12/29/2
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**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.

Step 2	: Select recipient type.
🙆 Me	mbers
Г	Include Members Without Email Addresses.
	(Will allow you to print address labels for those selected members.)
🔴 Em	ployees
C Gu	ests

- **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.

```
      Step 3: Select message delivery type.

      Send Email Message

      Send Text Message
```

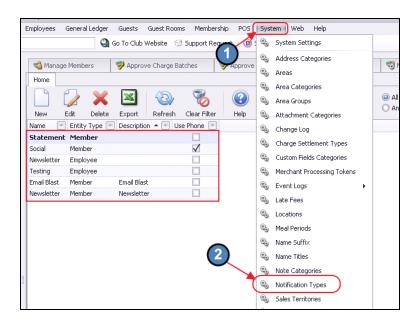
- Email Sends your message via email from the system.
- **Text** Sends your email message as a text. In order for this to work, members must have valid mobile phone number and carrier information listed in their member profile.

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

Step 4: Select recipient filte	ring options.	
Default Email Address		
Email Notification Type:	(None)	Q

- **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.

Home [572] Thomas Van Hook 🗙			
Home [572] Thomas Van Hook 🗙	· L		
👻 📹 Membership			
🇞 Groups	Edit Member		
🇞 Pictures	Member ID: 572	Thomas Van Hook	
📹 Preferences 🇞 Scheduled Changes	Member Type: Corporate Golf	😵 Edit Email	×
💮 Web Settings 👻 📹 Communication	Active		\$
No Physical Address	Title:	s Email Address: tvanhook@ce.com	
🐞 Email Address 👘	First: Thomas		
o Phone	Email: tvanhook@CE.com	Note:	
🇞 Messages		Default Email: 🗖 🚺	
👻 🧐 Financial Information	(2)		
🖏 AR Activity			
👸 Bank Accounts		Selected Name Start Date End Date Repeat Annu-	ally
🖏 Billing		Statement	-
🖏 Installment Billing	Note Is Default	It Social	
🖏 Credit Book			
🖏 Credit Cards	Notification Type Name Start		
Gift Cards	Statement	Email Blast	
Vouchers			
U Late rees			

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

Step 5: Configure Event or Price Schedule campaign s	ettings.
No Event or Price Schedule	
C Price Schedule:	9
C Event:	Q

- 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.

Next Finish Cancel Previous

#### 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	7	Filter List By R	eport Results:	(None)		Q	Run Report				
elected	Email Sent N	umber	Last Name	First Name	Contact	Туре	Status	Member Gr	Join Date	Month Joined	Birthday	Month Birth
		3	Shanks	Xavier	john_grant	Equity Golf	Resigned	A-G Minimu	6/1/1997	June	4/17/1960	April
<b>V</b>		3A	Christopher	Tandy	grantmba	Sp-Corpora	Active	9 Hole Gro			11/13/1960	November
×.		4	Huerta	Wibur	maryandga	Corporate	Suspended	All Primary	2/26/2004	February	6/8/1964	June
		4A	Huerta	Berry	nussbaum	Sp-Corpora	Active	18 Hole Gr			7/24/1965	July
		5	Rudolph	Damick	tomfoley@	Social (LOA)	Active	A-G Minimu	4/1/1997	April	12/16/1960	December
		5A	Rudolph	Yuri	turtlecarm	Sp-Social (L	Active	cathys test			5/16/1961	May
		6	Behrens	Haywood	jmstitt22@	Equity Golf	Active	All Primary	8/22/2002	August	8/24/1944	August
		6A	Behrens	Valene	chevy22@	Sp-Corpora	Active	All females,			10/1/1948	October
		7	West	Doyle	gtnational	Deferred Golf	Active	All Primary	8/22/2002	August	11/14/1953	November
		7A	West	Leah	jocy.teske	Sp-Corpora	Active	9 Hole Gro			4/25/1959	April
		8	Fontenot	Carter	B3Byram@	Corporate	Active	A-G Minimu	3/1/2006	March	7/22/1959	July
		9	Velazquez	Shon	scottc@clu	Corporate	Active	A-G Minimu	4/28/2008	April	1/4/1965	January
		9A	Velazquez	Jenelle	tayhansam	Sp-Corpora	Active	All females,			12/30/1964	December
		10	Overstreet	Santiago	jhzrust@d	Equity Golf	Active	All Primary	4/17/1997	April	9/6/1955	Septembe
		11A	Monkes	Patsy	patjensen	Sp-Corpora	Active	18 Hole Gr			9/27/1953	Septembe
		12	Walters	Alex	pieter.h.va	Corporate	Active	9 Hole Gro	8/3/2001	August	7/18/1971	July
		12A	Walters	Giuseppe	pieter.h.va	Sp-Corpora	Active	cathys test			9/27/1972	Septembe
		14	Bright	Porsha	jgamble787	Corporate	Active	All females,			11/3/1951	November
		14A	Bright	Aaron	petertaube	Sp-Corpora	Active	All Primary	7/6/2007	July	6/18/1950	June
		15	Burk	Giberto	thomas.dy	Corporate	Active	A-G Minimu	11/1/1997	November	10/11/1949	October
×.		16A	Mccloud	Regenia	carolvanioa	Sp-Deferre	Active	All females,			12/29/1970	December
$\checkmark$		17	Hightower	Issac	larson.scot	Deferred Golf	Active	All Primary	4/24/2008	April	7/9/1965	July
		17A	Hightower	Adrian	larson.tara	Sp-Deferre	Active	All females,			8/14/1975	August
		18	Bunch	Mel	cmozz@du	Corporate	Active	All Primary	11/1/1989	November	6/23/1953	June
		105	Drunch	Maso	i dovedkolak	Cn Corners	Arbita	All formulae			92471069	Esharrari F

There are additional Filter options on this screen as well.

Marketing	Wizard											· · · · · · · · · · · · · · · · · · ·
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Select Al			Filter List By R	eport Results:	(None)			Run Report			5	
Selected	Email Sent	Number	Last Name	First Name	Contact	Туре	Status	Member Gr Io (Custom)	in Date	Month Joined	Birthday	Month Birth
V		3	Shanks	Xavier	john_grant	Equity Golf	Resigned	Active	1,1997	June	4/17/1960	April
$\checkmark$		3A	Christopher	Tandy	grantmba	Sp-Corpora	Active	Business			11/13/1960	November
$\checkmark$		4	Huerta	Wilbur	maryandga	Corporate	Suspended		26/2004	February	6/8/1964	June
$\checkmark$		4A	Huerta	Berry	nussbaum	Sp-Corpora	Active	Miscellaneous Other Clubs			7/24/1965	July
$\checkmark$		5	Rudolph	Darrick	tomfoley@	Social (LOA)	Active	Prospect	1,1997	April	12/16/1960	December
$\checkmark$		5A	Rudolph	Yuri	turtlecarm	Sp-Social (L	Active	Resigned			5/16/1961	May
$\checkmark$		6	Behrens	Haywood	jimstitt22@	Equity Golf	Active		22/2002	August	8/24/1944	August
$\checkmark$		6A	Behrens	Valene	chevy22@	Sp-Corpora	Active	Social Prospect Staff			10/1/1948	October
$\checkmark$		7	West	Doyle	gtnational	Deferred Golf	Active		22/2002	August	11/14/1953	November
$\checkmark$		7A	West	Leah	jocy.teske	Sp-Corpora	Active		)		4/25/1959	April
		8	Fontenot	Carter	BJByram@	Corporate	Active	A-G Minima 3	1/2006	March	7/22/1959	July

- 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 <u>Grids</u> 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.

ookup Value (Double Cl	ick or Press Enter To Select A Value)	x
Search:		0
Category Name	Name	2
Membership	AR Aging	*
Membership	Credit Book Transactions	1
Membership	Custom Field Values	
Membership	Delinquent Members	
Membership	Event Reservations	
Item	Item Sales	
Item	Items Purchased By Members	
Membership	Member Addresses	
Membership	Member Birthdays	
Membership	Member List	
Membership	Member Minimum Activity	U
Membership	Member Payment Activity	
Membership	Member Type Count	
Membership	Member Web Logins	
Membershin	Outstanding Credit Books	

• 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**.

🖳 Delinquer	nt Members									
Report Settin	igs: (Default)	🔻 🚼 Save Curren	nt Settings 🛛 📋 🛙	Delete Selected	i Setting 🕴 🗖	Make Public	🛃 Market to	These Results		📴 Provide Feedback 🔌 View Report
As Of Date: Groups: Types: Members:	(All)	Period Detail Leve	r: <all account<br="">s: (All) el: Member e: 0</all>	5> ¥ ¥				1	4	2
<b> </b> ≪ ≪ 1	of 32 🕨 🎽   🔅 (	8 🕲   🖨 🔲 🛍	<b>1 🔍 -</b>   100%		-	Find   N	lext			
Clubsoft Acc	ceptance Server									
Delinquent Mer	mber Report									
As of 5/8/2017	7		C	lub	ac.	sen	tial	-		
Member: <alb< td=""><td></td><td></td><td>C</td><td>100</td><td>93.</td><td>3011</td><td>iiu</td><td></td><td></td><td></td></alb<>			C	100	93.	3011	iiu			
Member Type:	(Alb									
AR Ledger: <a< td=""><td>Il Accounts&gt;</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></a<>	Il Accounts>									
Member Group	⊭ <alb< td=""><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></alb<>									
									(3)	
Member ID	# Member Name	≎ One ≎ Month	Month	Three ≎ Month	Four ≎ Month		Six ≎ lonth+	Total 💲		
10	A, TEST	\$0.00		\$1,268.12	\$0.00	\$1,358.10	\$3,982.07	\$6,608.29		
<ul> <li>              510      </li> <li>             541         </li> <li>             ×10043         </li> <li>             10270         </li> <li>             ×10067         </li> <li>             10300         </li> </ul>	Abba, Abba	\$1.00		\$4,196.72	\$1,205.00		\$11,616.96	\$19,337.34		
	Abel, Cody	\$0.00		\$1,045.00	\$0.00	\$1,058.76	\$1,193.09	\$3,296.85		
10270	Abel, Sharan	\$0.00		\$1,000.00	\$0.00	\$1,000.00	\$600.00	\$2,600.00		
★ xx10067	Acevedo, Mavis	\$0.00		\$1,000.00	\$0.00	\$1,000.00	\$600.00	\$2,600.00		
10300	Ackerman, Angelyn	\$0.00	\$0.00	\$1,000.00	\$0.00	\$1,000.00	\$600.00	\$2,600.00		

The following popup will appear:

	Replace Selected
8	Would you like to replace your currently selected results with only the results from this report?
	Yes No Cancel

- 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.

Marketin Select	g Wizard people to mai	ket to										Ó
Select All	UnSelect 4	All 🍞	Filter List By R	eport Results:	Delinquent Men	nbers		Run Report				
Selected	Email Sent	Number	Last Name	First Name	Contact	Туре	Status	Member Gr	Join Date	Month Joined	Birthday	Month Birth
$\checkmark$		3	Shanks	Xavier	john_grant	Equity Golf	Resigned	A-G Minimu	6/1/1997	June	4/17/1960	April
		ЗA	Christopher	Tandy	grantmba	Sp-Corpora	Active	9 Hole Gro			11/13/1960	November
$\checkmark$		4	Huerta	Wilbur	maryandga	Corporate	Suspended	All Primary	2/26/2004	February	6/8/1964	June
		4A	Huerta	Berry	nussbaum	Sp-Corpora	Active	18 Hole Gr			7/24/1965	July
$\checkmark$		5	Rudolph	Darrick	tomfoley@	Social (LOA)	Active	A-G Minimu	4/1/1997	April	12/16/1960	December
		5A	Rudolph	Yuri	turtlecarm	Sp-Social (L	Active	cathys test			5/16/1961	May
$\checkmark$		6	Behrens	Haywood	jimstitt22@	Equity Golf	Active	All Primary	8/22/2002	August	8/24/1944	August
		6A	Behrens	Valene	chevy22@	Sp-Corpora	Active	All females,			10/1/1948	October
$\checkmark$		7	West	Doyle	gtnational	Deferred Golf	Active	All Primary	8/22/2002	August	11/14/1953	November
		7A	West	Leah	jocy.teske	Sp-Corpora	Active	9 Hole Gro			4/25/1959	April
$\checkmark$		8	Fontenot	Carter	BJByram@	Corporate	Active	A-G Minimu	3/1/2006	March	7/22/1959	July
$\checkmark$		9	Velazquez	Shon	scottc@clu	Corporate	Active	A-G Minimu	4/28/2008	April	1/4/1965	January
		9A	Velazquez	Jenelle	tayhansam	Sp-Corpora	Active	All females,			12/30/1964	December
$\checkmark$		10	Overstreet	Santiago	jhzrust@cl	Equity Golf	Active	All Primary	4/17/1997	April	9/6/1955	Septembe
		11A	Montes	Patsy	patjensen	Sp-Corpora	Active	18 Hole Gr			9/27/1953	Septembe
$\checkmark$		12	Walters	Alex	pieter.h.va	Corporate	Active	9 Hole Gro	8/3/2001	August	7/18/1971	July
		12A	Walters	Giuseppe	pieter.h.va	Sp-Corpora	Active	cathys test			9/27/1972	Septembe
$\checkmark$		14	Bright	Porsha	jgamble787	Corporate	Active	All females,			11/3/1951	November
		14A	Bright	Aaron	petertaube	Sp-Corpora	Active	All Primary	7/6/2007	July	6/18/1950	June
$\checkmark$		15	Burk	Gilberto	thomas.dy	Corporate	Active	A-G Minimu	11/1/1997	November	10/11/1949	October
		16A	Mccloud	Regenia	carolvanioa	Sp-Deferre	Active	All females,			12/29/1970	December
$\checkmark$		17	Hightower	Issac	larson.scot	Deferred Golf	Active	All Primary	4/24/2008	April	7/9/1965	July
		17A	Hightower	Adrian	larson.tara	Sp-Deferre	Active	All females,			8/14/1975	August
$\checkmark$		18	Bunch	Mel	cmozz@clu	Corporate	Active	All Primary	11/1/1989	November	6/23/1953	June
•		105	Punch	Marse	ulaan@dub	SP CORPORA	Active	All Formalion			21/11052	Esherraerr }
										-		

#### 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	? X
Marketing Wizard Select and/or edit a template	1
Message Body       Load an existing template into the editor:       (None)         Formats → Paragraph → Font Family → Font Sizes →       →       →       ○       →       ○       →       ○       ○       →       ○       ○       →       ○ </th <th>Member Number Birth Date Birth Date Title First Name Middle Name Middle Name Middle Name Member Custom Fields System System Web Custom Page Meb Module</th>	Member Number Birth Date Birth Date Title First Name Middle Name Middle Name Middle Name Member Custom Fields System System Web Custom Page Meb Module
Cancel	Previous Next Finish

#### 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.

Marketing Wizard Marketing Wizard Send Emails		
Email Header Configuration From: smzak@clubessential.com Subject: We're Missing You! Carbon Copy: Attachment: (None) © Send All Messages Immediately © Send All Messages After 5/ 8/2017 ¥ 10:45:59 AM Send 0 each ¥	Email Processing Log         Status	3
Cancel		Previous Next Finish

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.

Confirm	
Sending 725 messages. Do you wish to continue?	╞
Yes No	F

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.

		1
Email Header Configuration	Email Processing Log	
From: szak@clubessential.com	Status	
Subject: Test Email! Please disregard!	tvanhook@CE.com - Complete	
Carbon Copy:		
Attachment: (None)		
<ul> <li>Send All Messages Immediately</li> </ul>		
O Send All Messages After		
5/ 8/2017 💌 11:50:42 AM 🚔		
$^{ m C}$ Send Messages In Batches Starting		
5/ 8/2017 💌 11:50:42 AM 📄		
Send 0		
each		
court		
1		μ
Close		Previous Next Finished

## **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.

Home						
		×		8		iearch:
New	Edit	Delete	Export Refresh	Clear Filter	Help	
Name		Sele	ected Count 💌 Sent (	Count 💌 Rea	d Count 🛛 💌	Read Percent 📐
Club close	ed		729	729	382	52%
Super No	tes 11-2-1	1	463	463	241	52%
super no	otes 10-2	20	466	466	208	44%
Super No	tes Septer	nb	472	472	226	47%
9-Hole Av	vards Luno	:he	92	92	67	72%
club cham	pionship f	inal	462	462	196	42%
Super No	tes the Re	al	463	463	216	46%
Juniior Clu	ub Champi	on	445	445	184	41%
80 110			220	220	107	46.07