



Hosted Editor

2017 - Winter Edition

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Overview

The **Editor** tool appears in the **Marketing** Template portion of CMA. It can be utilized when creating marketing templates. The editor has many functions similar to those found in Microsoft Word in addition to custom features of the CMA. The user can ‘mouse over’ the icons to see its function. This guide will specifically take a look at the most commonly used functions of the editor.

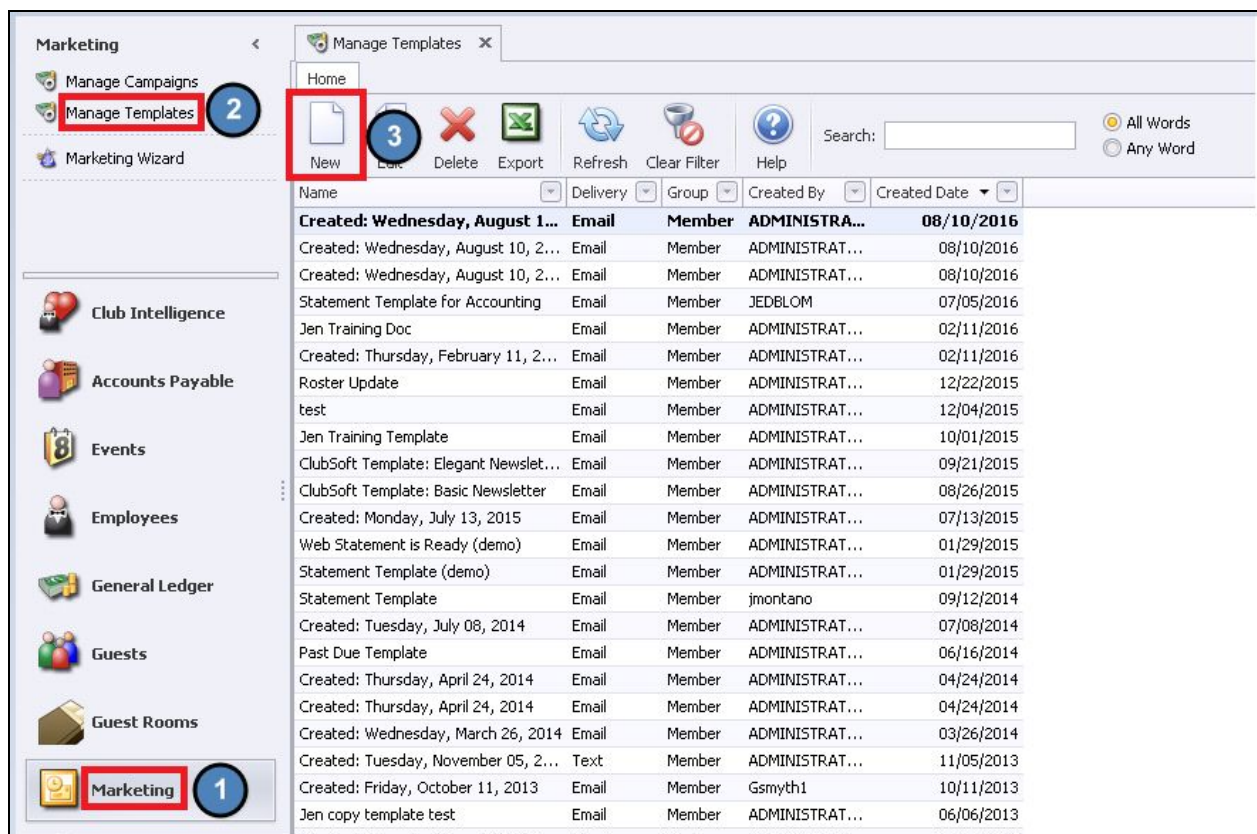
Please Note: All new clients/PayCloud users will use this editor. Clients still using CSWeb will use the [Classic Editor](#).

Use Case(s)

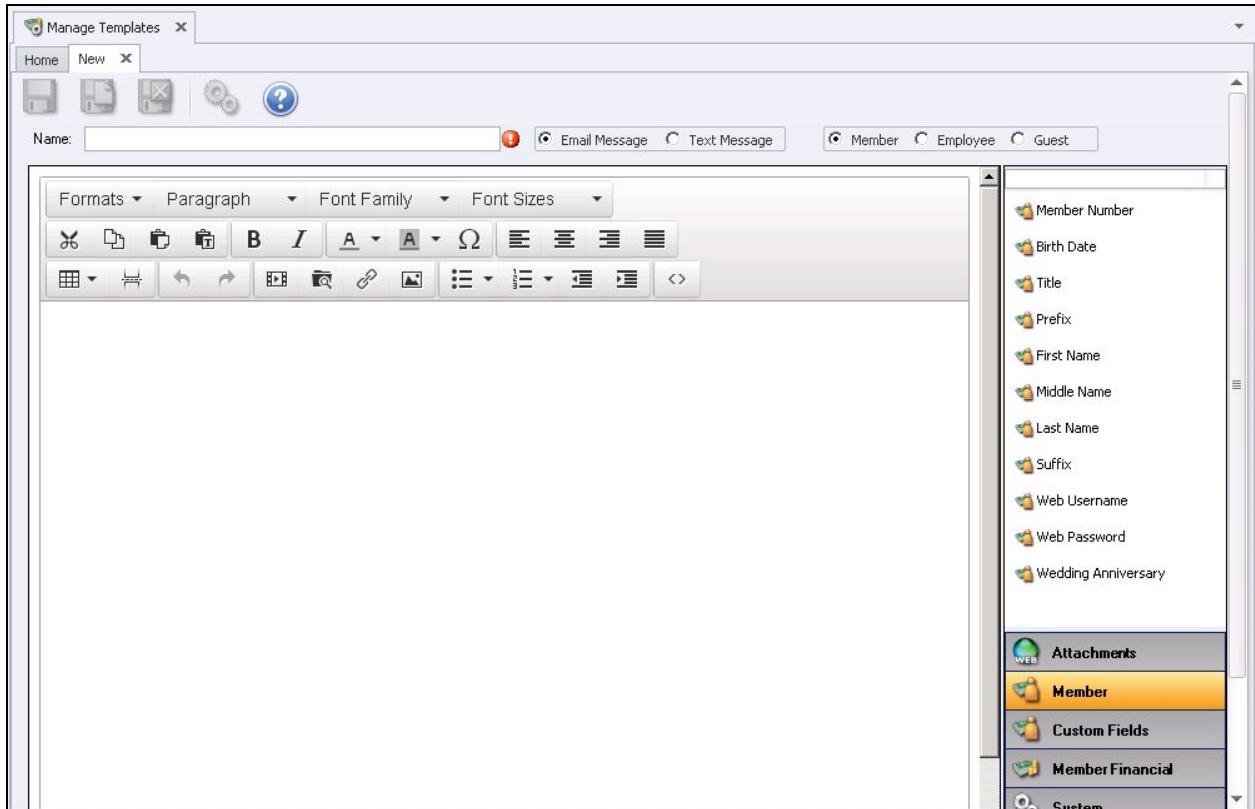
- A Club Admin would like to add stylized content but is unsure of how to correctly use the multitude of features within the Hosted Editor.

Accessing the Tool

1. Select **Marketing Module > Manage Templates > New Icon**



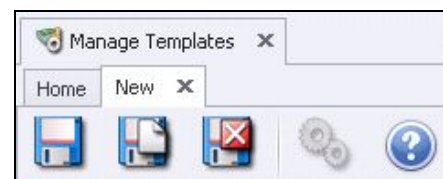
2. Clicking the **New** Icon or **double clicking on the name** of an existing template will open the editor. This is what the editor will look. If your editor does not look like this, please notify Clubessential so we can update your editor to the most recent version.



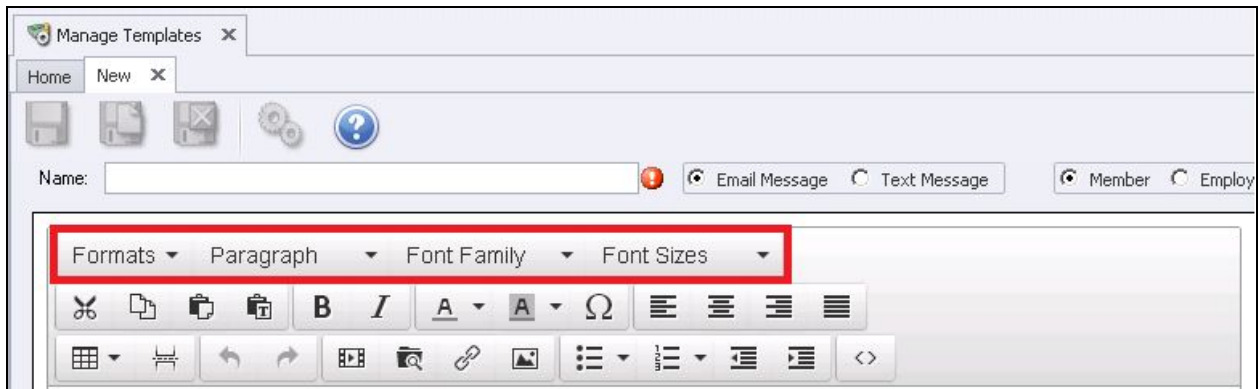
Basic Icons of the Editor

Save Icons

- A. Save** - Saves your changes
- B. Save and New** - Saves and opens a new template/editor.
- C. Save and Close** - Saves and closes editor/template

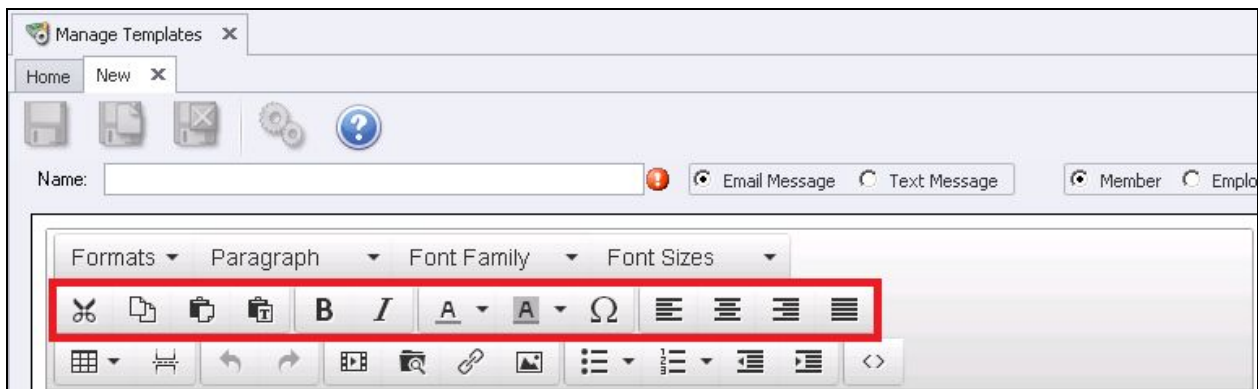







First Row of Icons







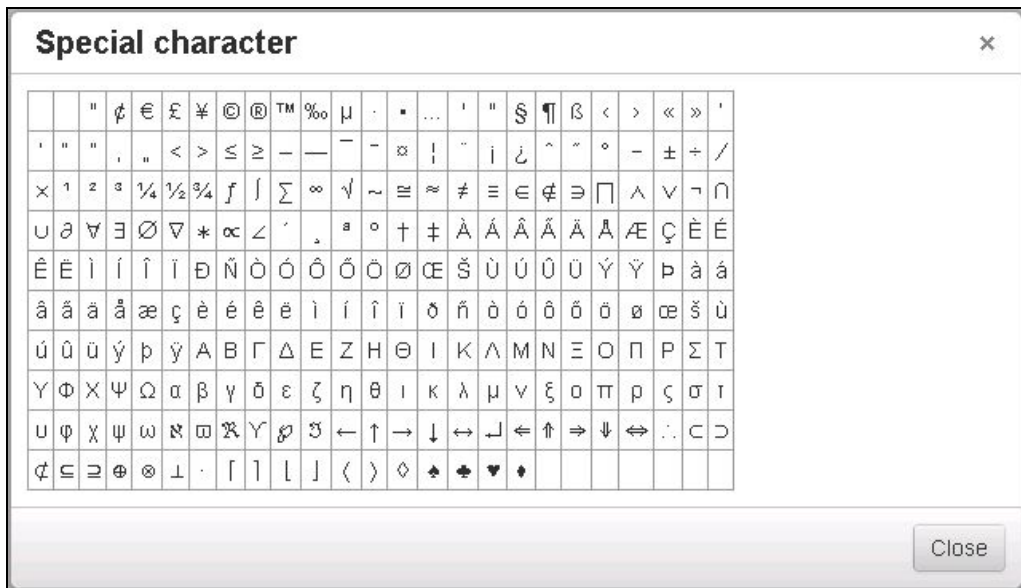
- A. **Formats** - Use preset formatting options for paragraphs, headers, etc..
- B. **Paragraph** - Choose among different paragraph form structures
- C. **Font Family** - Select text font. Each club's system has a default font, it is usually best to use the default font when creating emails for consistency
- D. **Font Size** - Select size of text font. The Font size is in points.

Second row of Icons



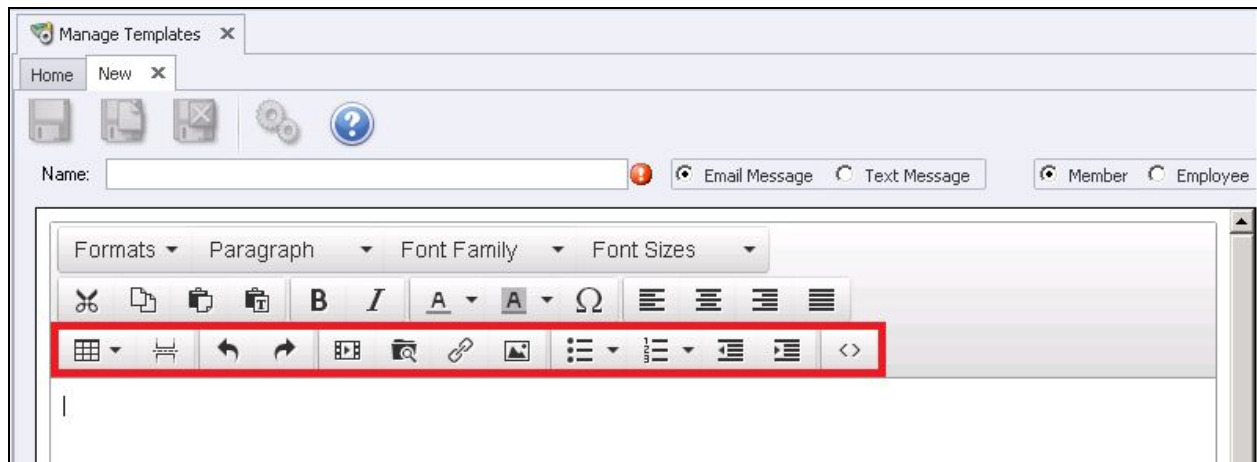
- A.  **Cut** - Remove text or images
- B.  **Copy**
- C.  **Paste**
- D.  **Paste as Text** - Paste text, removing all formatting. Recommended paste option.
- E.  **Bold Text**


- F.  **Italicize Text**
- G.  **Text Color**
- H.  **Background Color**
- I.  **Special Characters** - A special array of characters can be added to the body of the template.



- J.  **Alignment** - Left, Center, Right, Full Alignment Text Formatting.

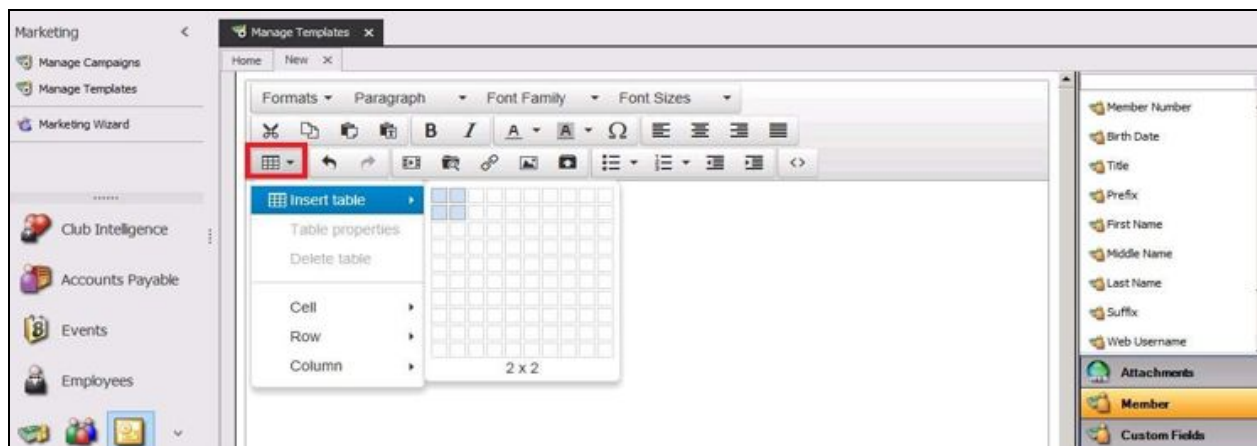
Third Row of Icons



- A.  **Table**- For instructions on inserting a table, please see below.

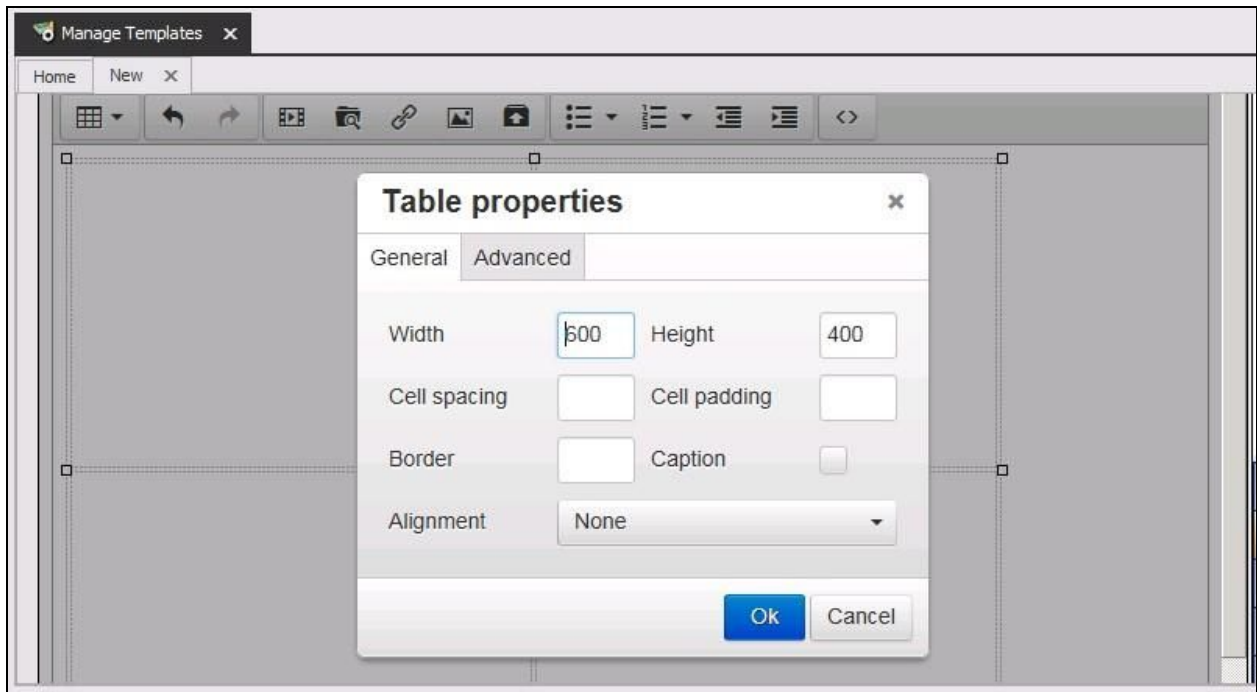
When adding a **table**:

1. Click **table icon** in toolbar and **select number of rows and columns**. This will place the table into the body of the template.

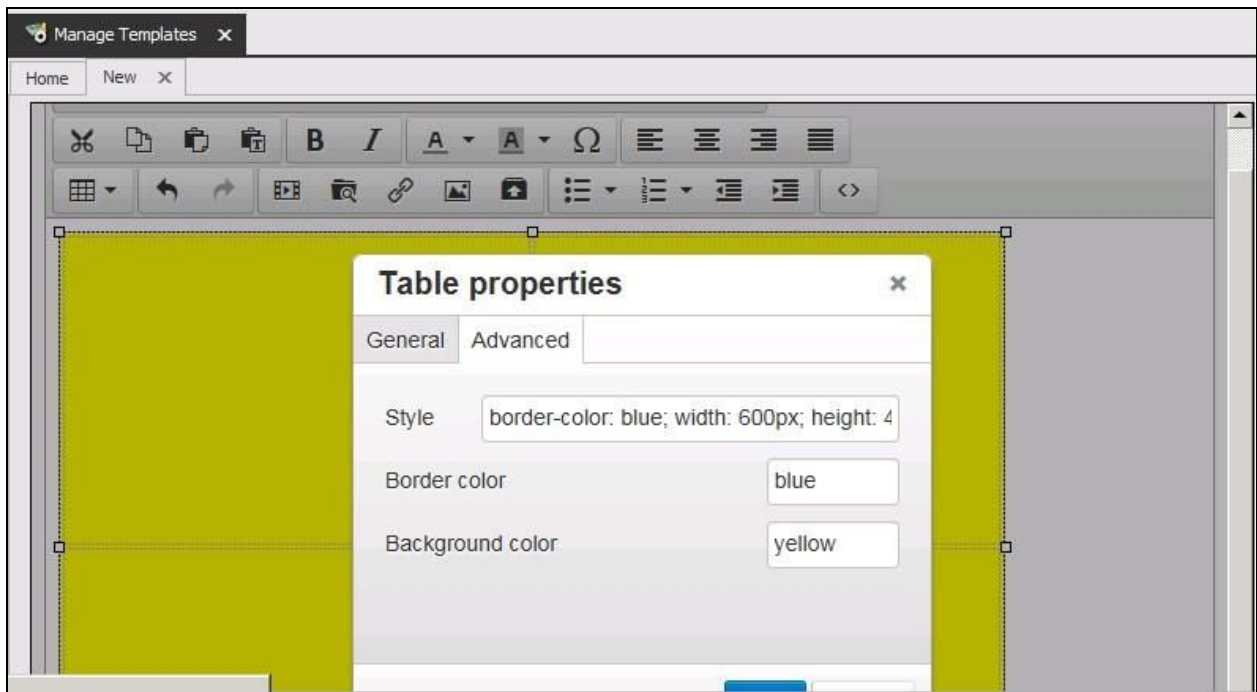


To edit the **table properties**:




1. Make sure your cursor is on the table.
2. **Click the table icon** in the toolbar and select the **'edit table properties' option**.
3. On the **General tab**, you can set the **width/height** of the table as well as the **border size** and **alignment** of the table.



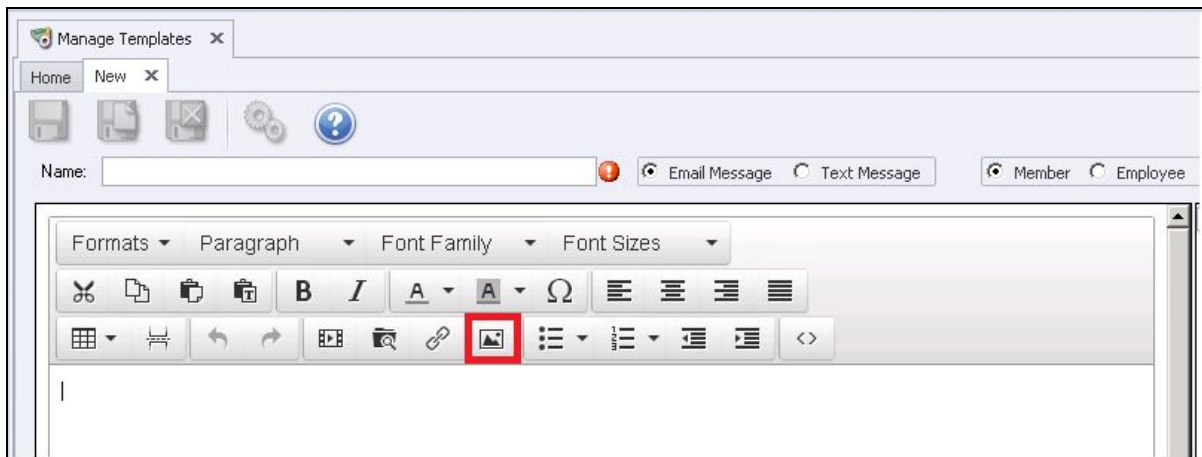
4. On the **Advanced Tab** of the Table Properties, you can also set a **border and background color**



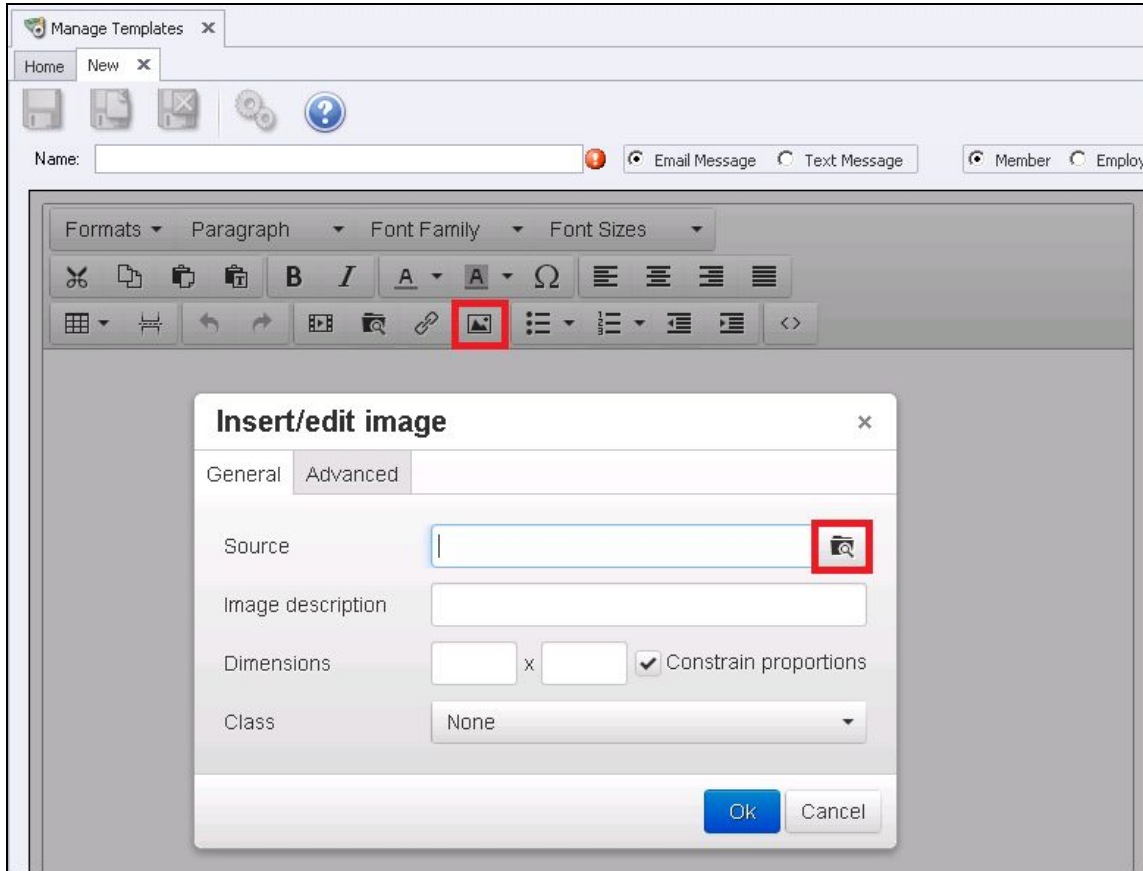
B.  **Page Break**

- C.  **Undo/Redo Buttons**
- D.  **Insert/Edit Video**
- E.  **Insert/Edit Image**- Please see below instructions

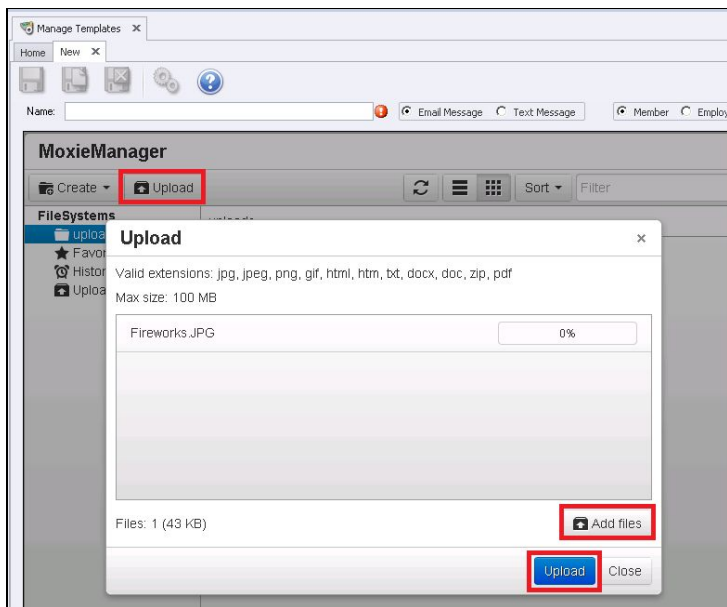
There are several icons in the toolbar that will allow you to insert an image. The method shown below will work with several browsers, including Internet Explorer 10 or higher. This is the recommended method for uploading, inserting and editing images in the body of the template.



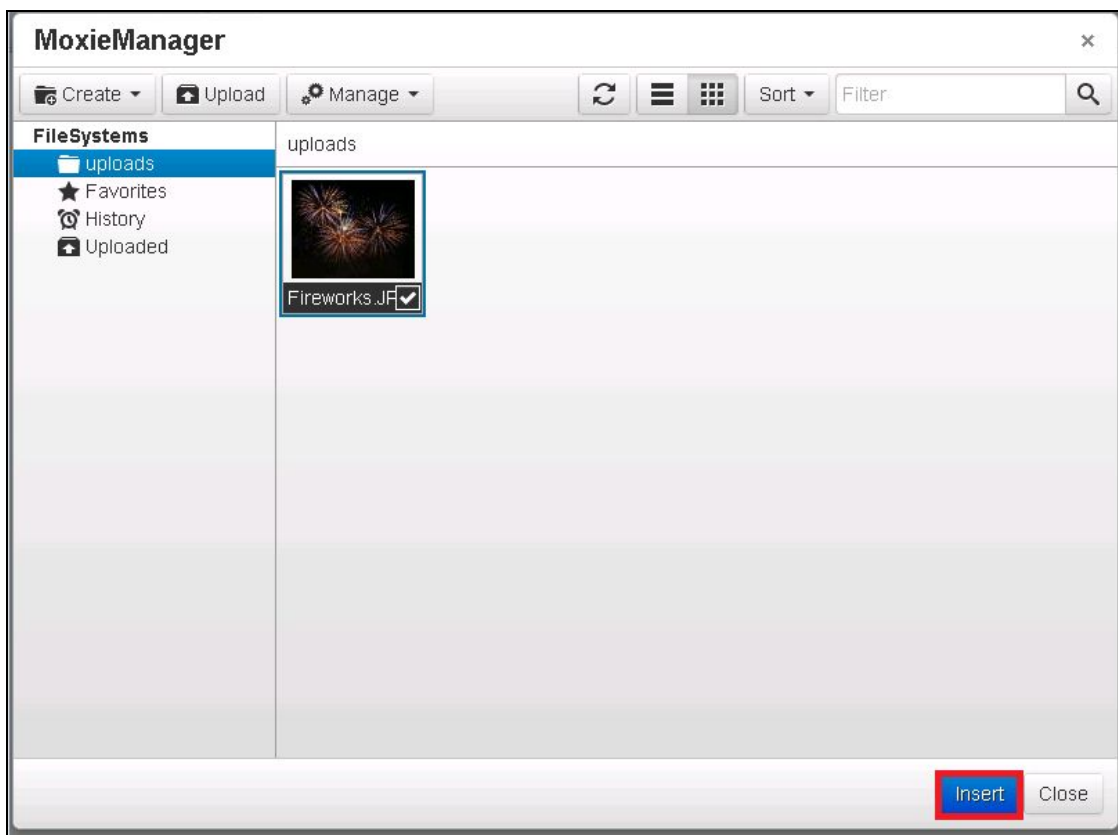
First, you must **upload the image** onto the server. Click the **Insert/Edit Image** icon on the template toolbar (see above) A new browser window will open (below). Here you can upload a single image or multiple images by clicking the **Browse** feature to the right of **Source** Column.



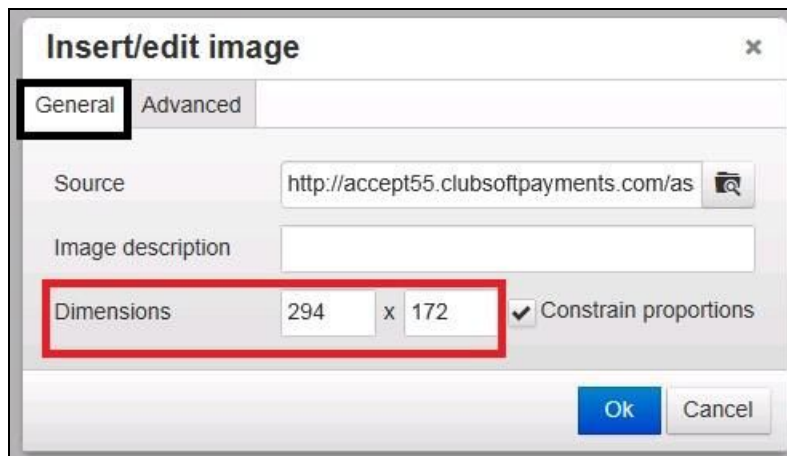
Select the **Upload** button below. Select **Add Files** and browse for your image. Once image is selected, click **Upload**. When the file finishes upload, they will show 100%. You can now close the upload window.



Select Close and files you have uploaded appear in the Uploads folder. Select Insert and you will be brought back to the **General Tab**.

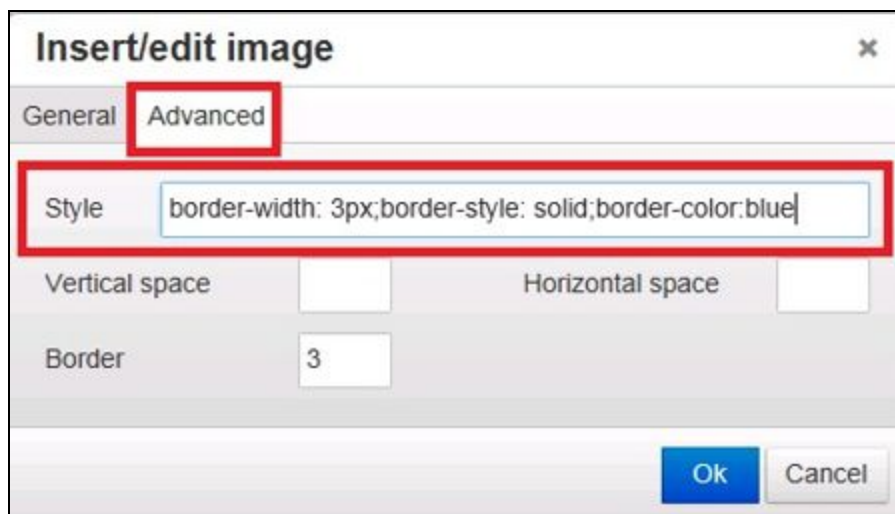


You can set the **dimensions** on the **General Tab**.



You can also add a **border** using the **Advanced Tab**. By inserting a number in the border box, the **border-width** will auto-populate in the style box; however you must manually type **border-style: solid;** in order for the border to show.

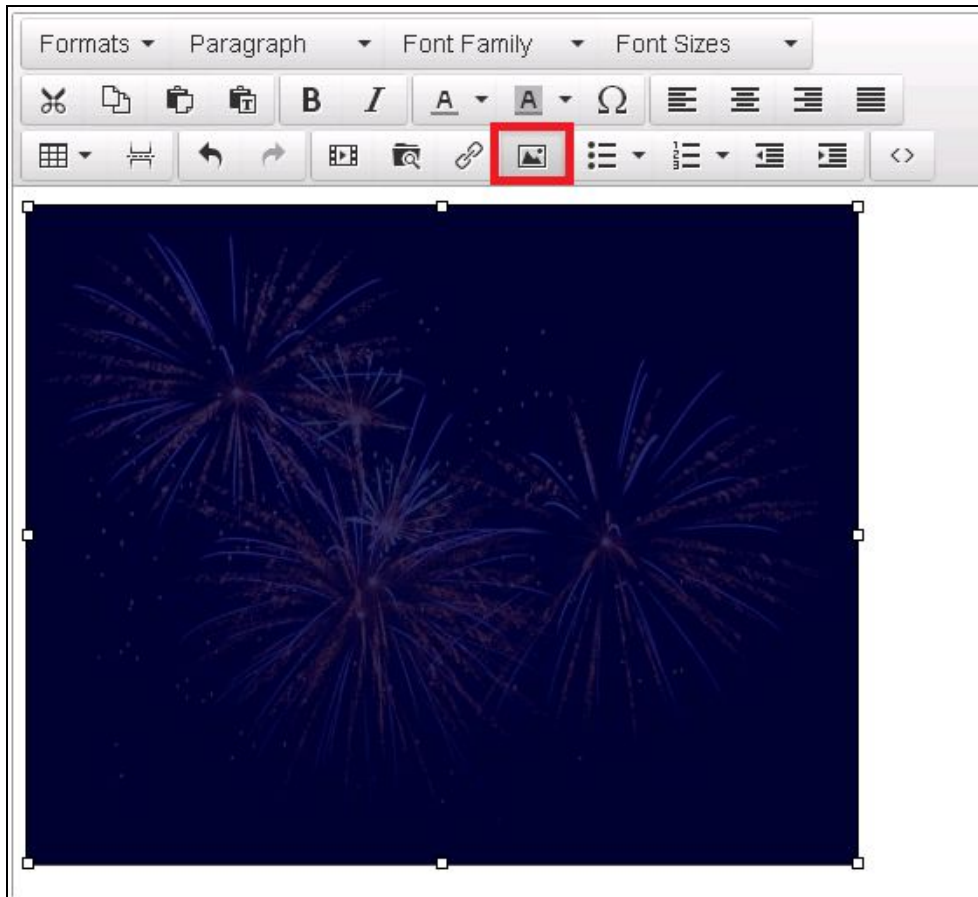
As you can see in the example below, you can type in **border-color: blue** in order to change the color of the border.





When finished select **OK** and the Image will be added to the template.

To **edit the properties** of the image after it has been inserted into the body of the template:

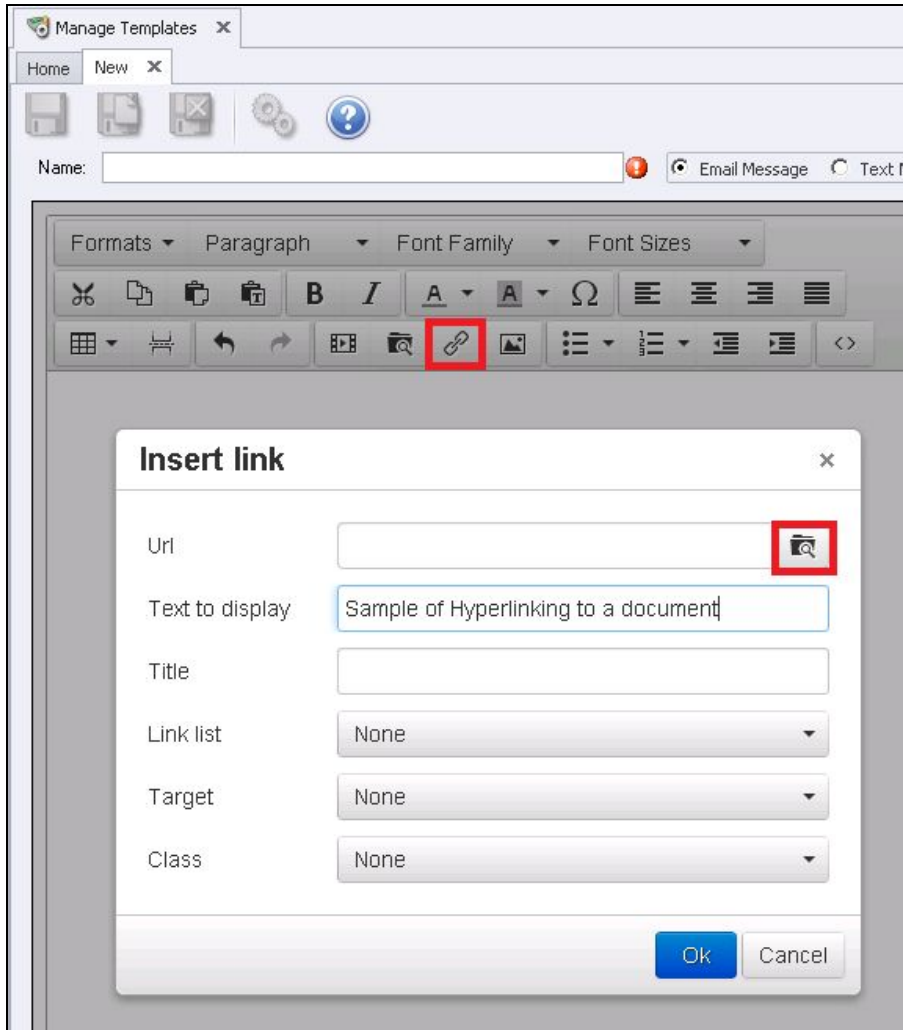
Click the image and then **click the insert/edit image icon** in the toolbar



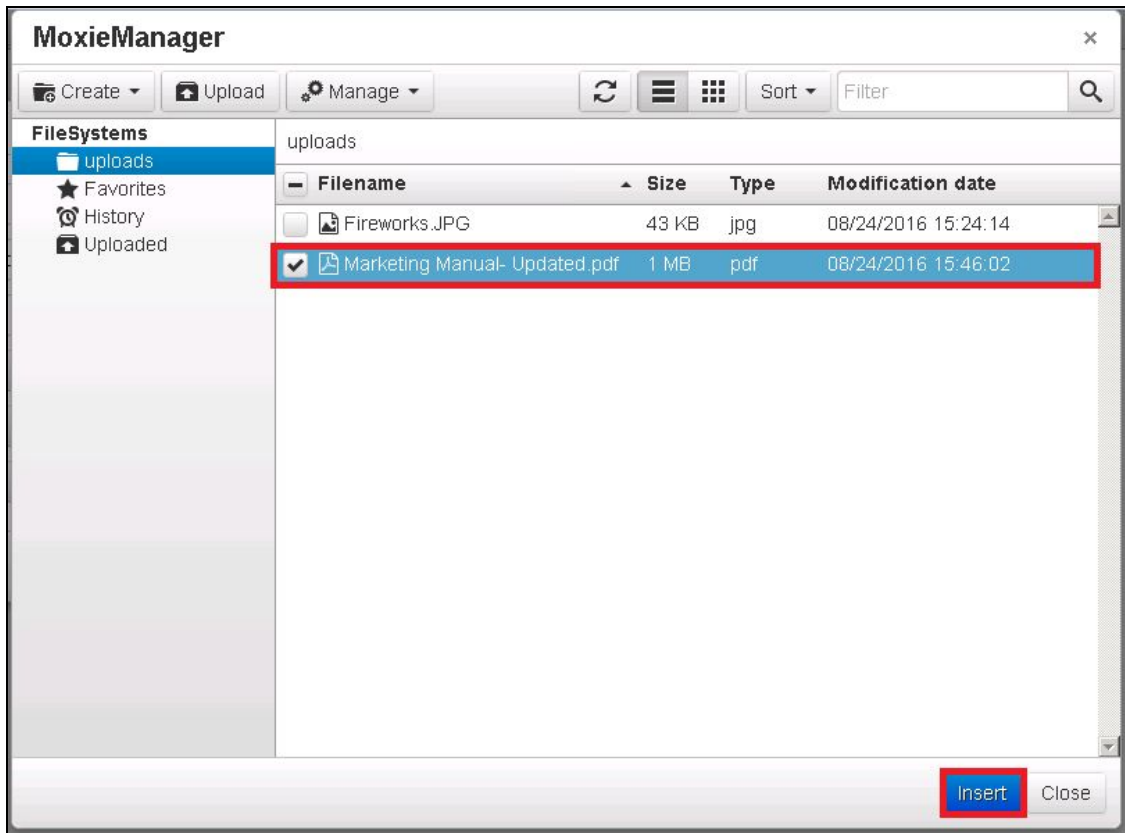
- F.  **Insert/Edit File-** Please see **Insert/Edit Link** below to learn the recommended option to include documents/Files in an email template.
- G.  **Insert/Edit Link-** Please see instructions below.

This is the recommended way to include links to documents in your email. PDF is the recommended format. As with images, you first need to upload the PDF.

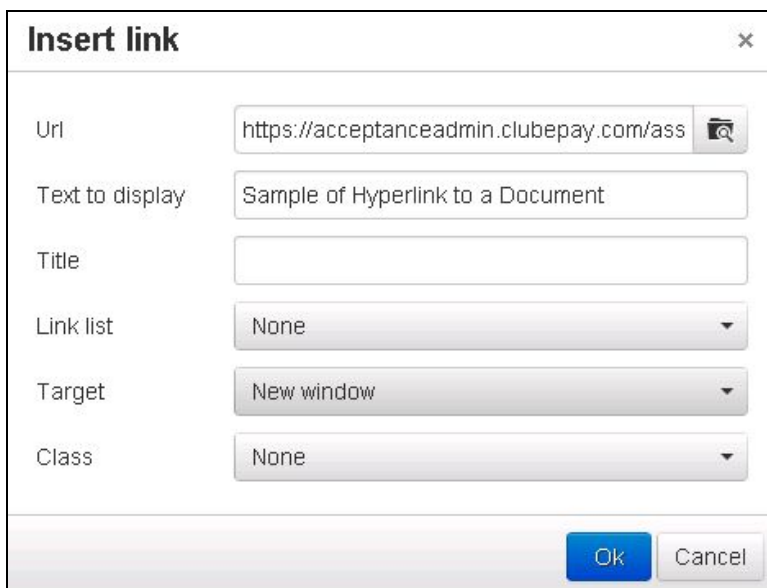
Once your document has been uploaded to the server, you are ready to link your document in the body of the template. First, type the text that the viewer will click. Then, highlight that text and click the Insert/Edit Link icon in the toolbar.







Click the **Browse icon** to browse for your PDF in the **uploads list** place a checkmark next to the file then click insert.



Set the **Target** to **New Window**. Click **OK**. Now your document is linked to the text in the body of the template





- H.  **Unordered List** - Format list with bullets or symbols
- I.  **Order List** - Format list with numbering or lettering options
- J.  **Decrease/Increase Indent**
- K.  **HTML** - View the HTML code vs. the visual editor view. This is for experienced administrators

Custom Plug-Ins

This option is available **ONLY** in the Marketing Editor Template.

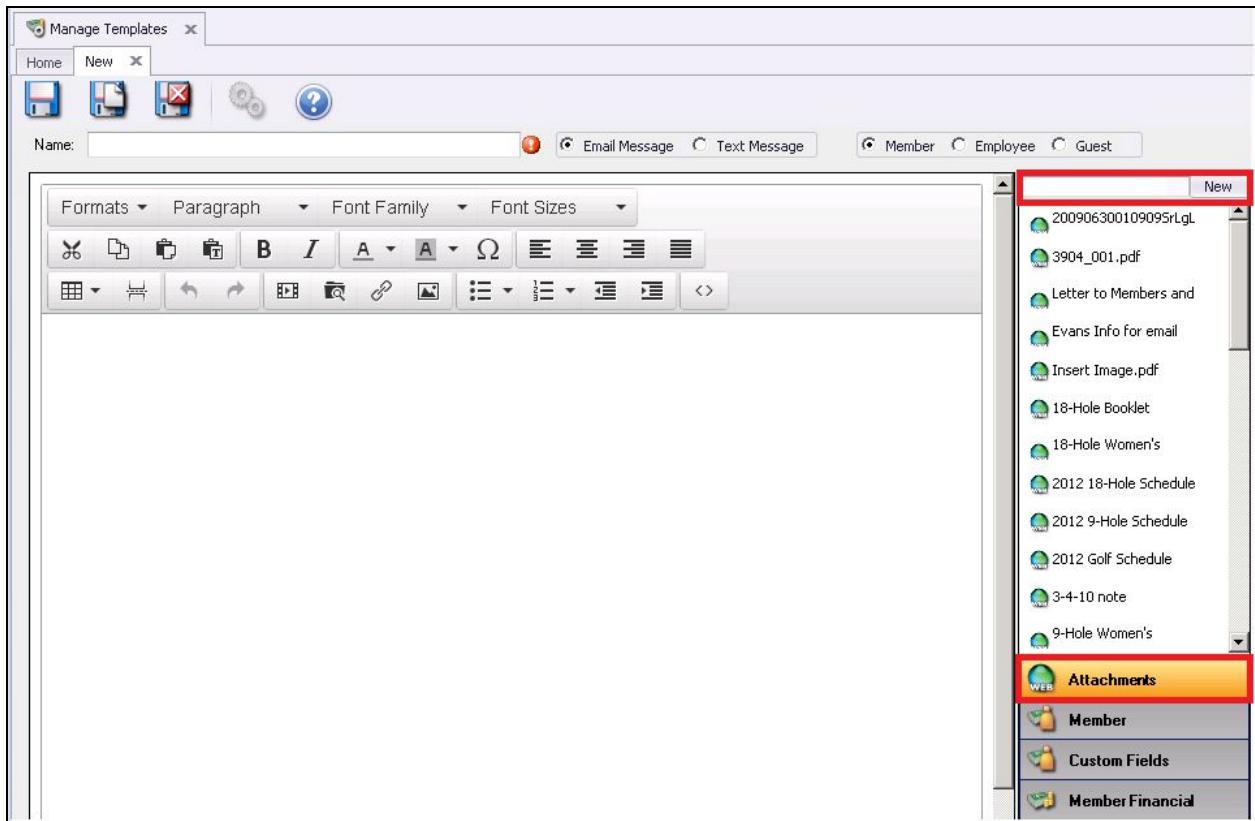
Use these custom plug-in options to customize/personalize the email template. Options include **Attachments**, **Member**, **Custom Fields**, **Member Financial**, and **System**. Click the plug-in option on the right side of the editor for detailed options.

Attachments

The following is one option to upload and attach documents into the email template.

Please Note: *The recommended option is to attach files/documents via the hosted editor (Click [Here](#) for more information).*

Using this feature will display the attachment file name exactly as the file name is when uploaded. Clicking the **Attachment button** will display all attachments currently uploaded. Click the **attachment name** to insert into document.



To upload a new attachment:

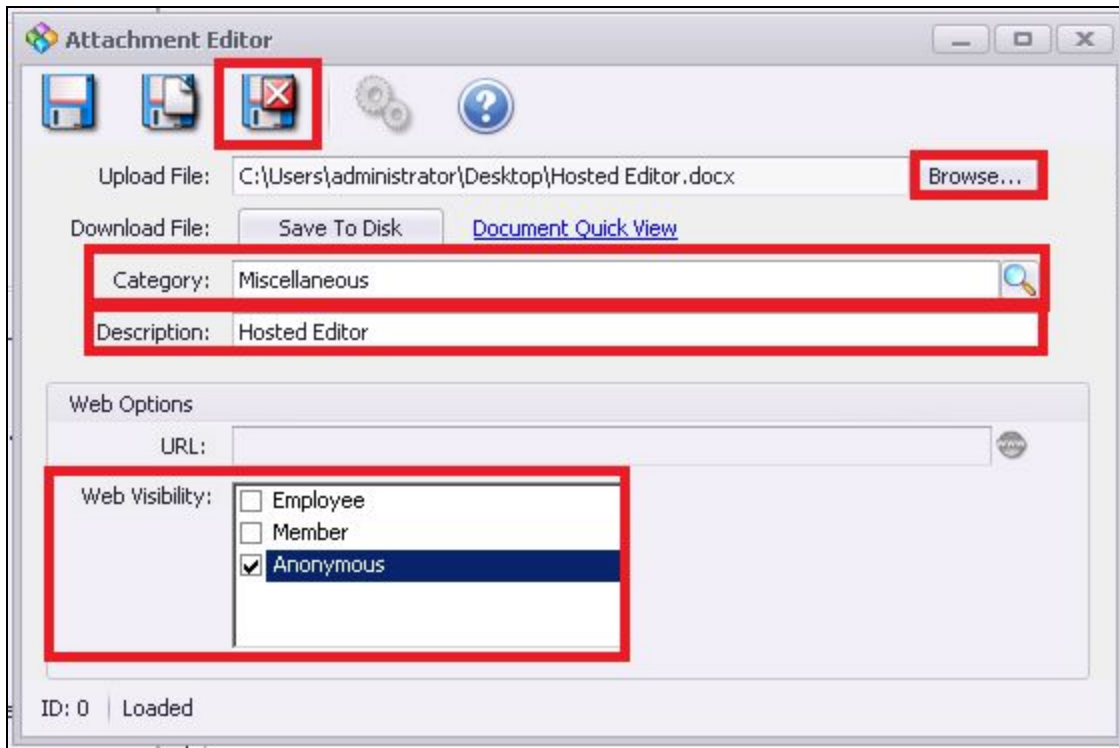
Click the **New** button in the top right corner then **browse** your computer for the file.

Select a **category** by clicking the looking glass, enter a **Description** of the file (optional).

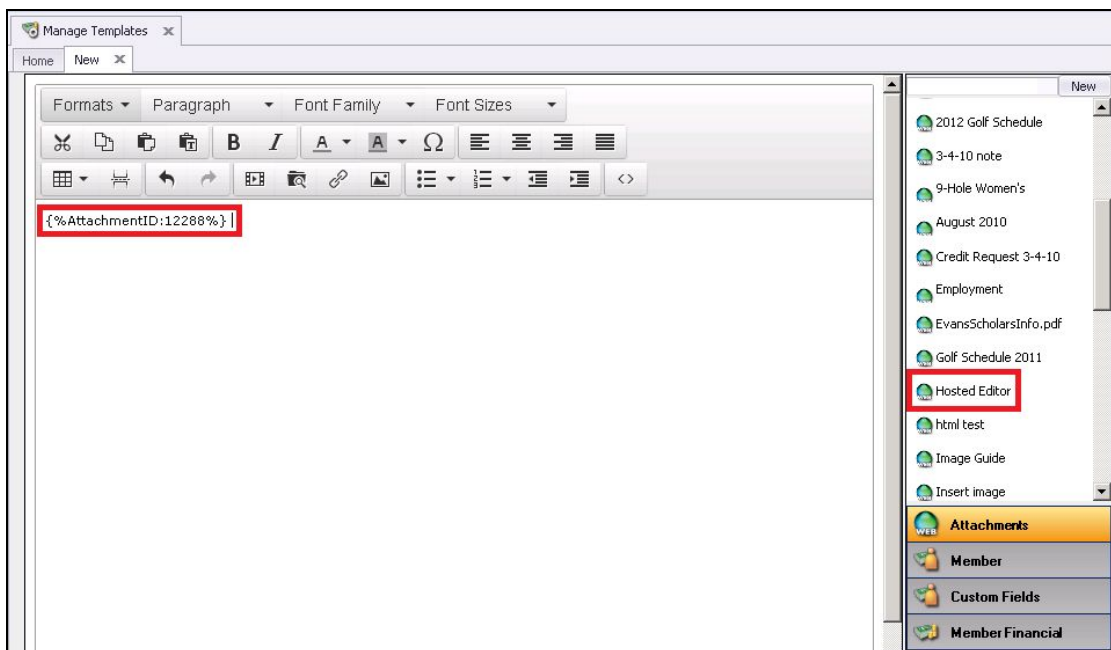
Set **Web Visibility Settings**. 'Anonymous' will allow the member to open the attachment without logging into the website.

Save and Close .

Please Note: *Download File* allows you to download the file onto a disk while the **Document Quick View** allows you to preview the document.

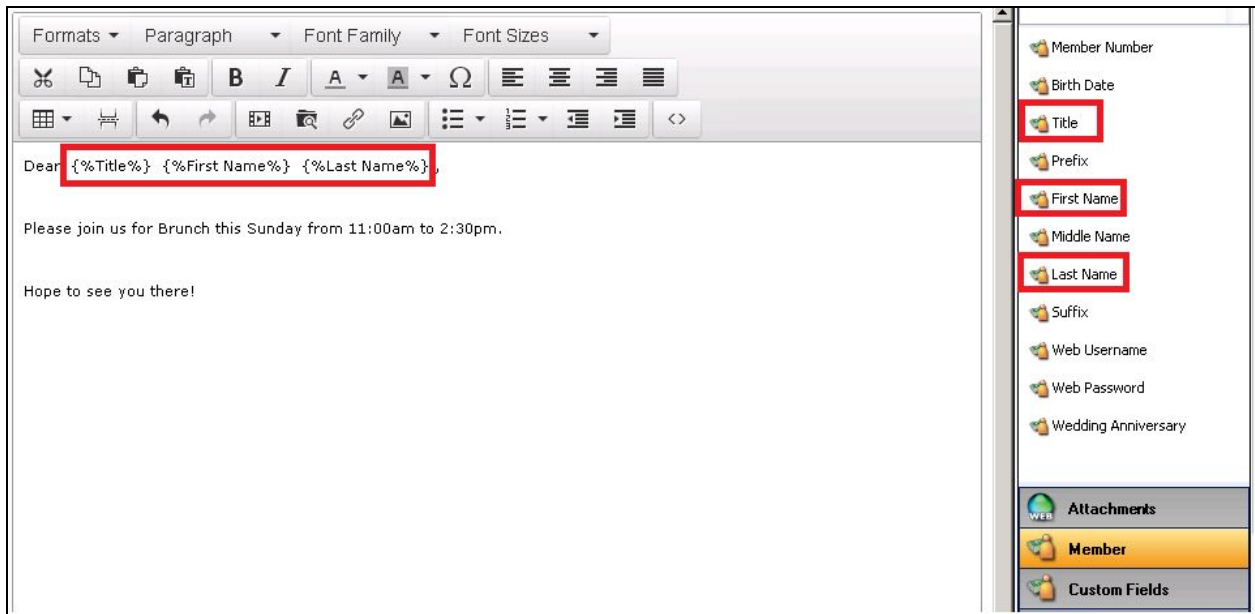


Once the new file is uploaded, it will appear in the list of attachments. Click the **file name** to insert into the editor as seen below.



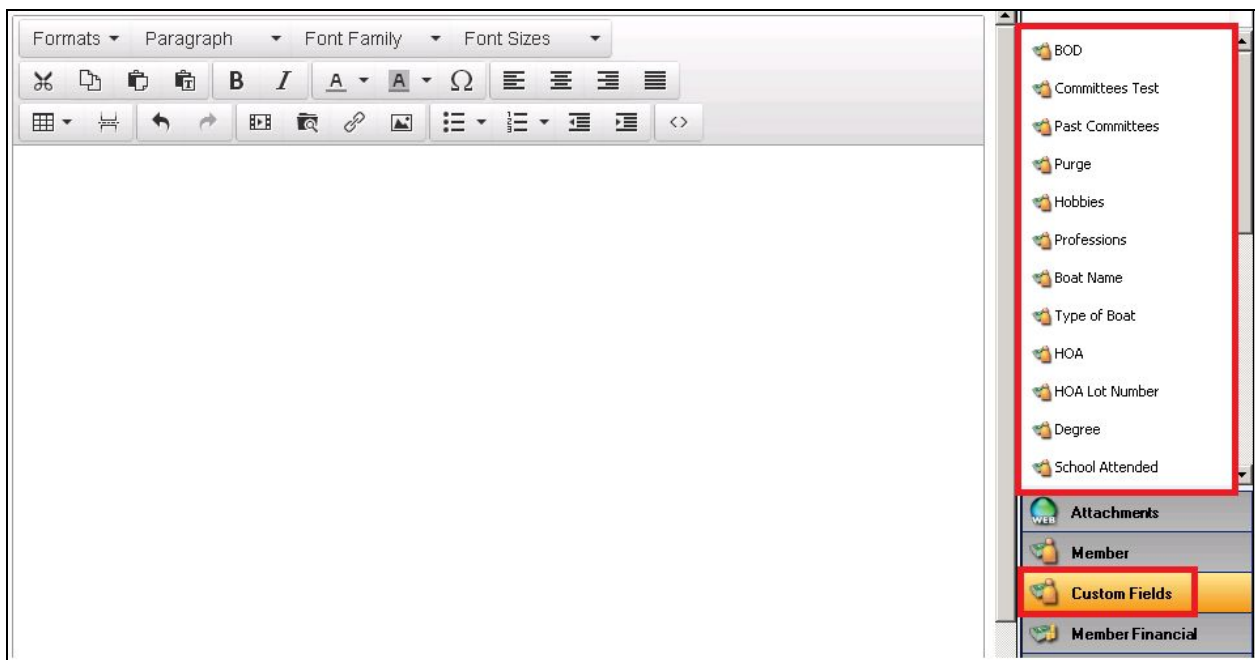
Member

This plugin allows you to customize the **member's personal information** such as their name, member number and birthdate. It works similar to a mail merge feature pulling information from the database into the document. Click the member information you wish to include. **Example below**



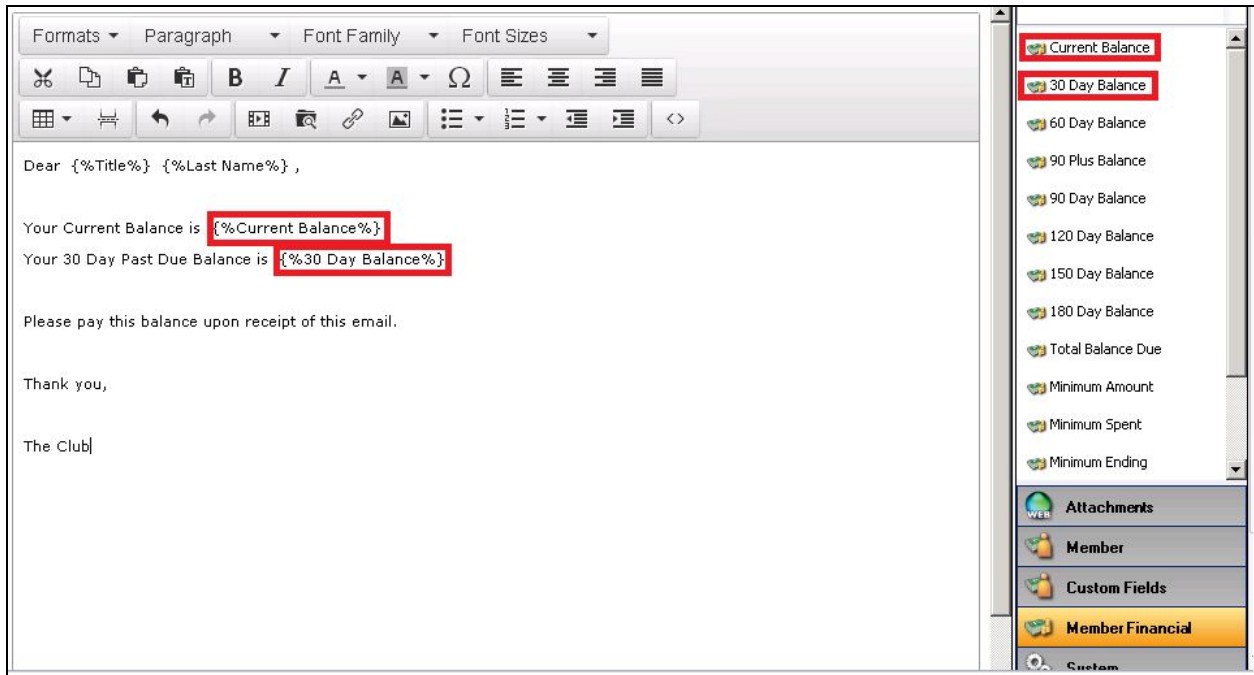
Custom Fields

This plug-in pulls in data from 'custom fields' in the database.



Member Financial

Use this plugin to include data such as food minimums, current balance due, and past due amounts



The screenshot displays the Member Financial plugin interface within a hosted editor. The editor's main area contains a template email with the following text:

Dear {%Title%} {%Last Name%} ,

Your Current Balance is {%Current Balance%}

Your 30 Day Past Due Balance is {%30 Day Balance%}

Please pay this balance upon receipt of this email.

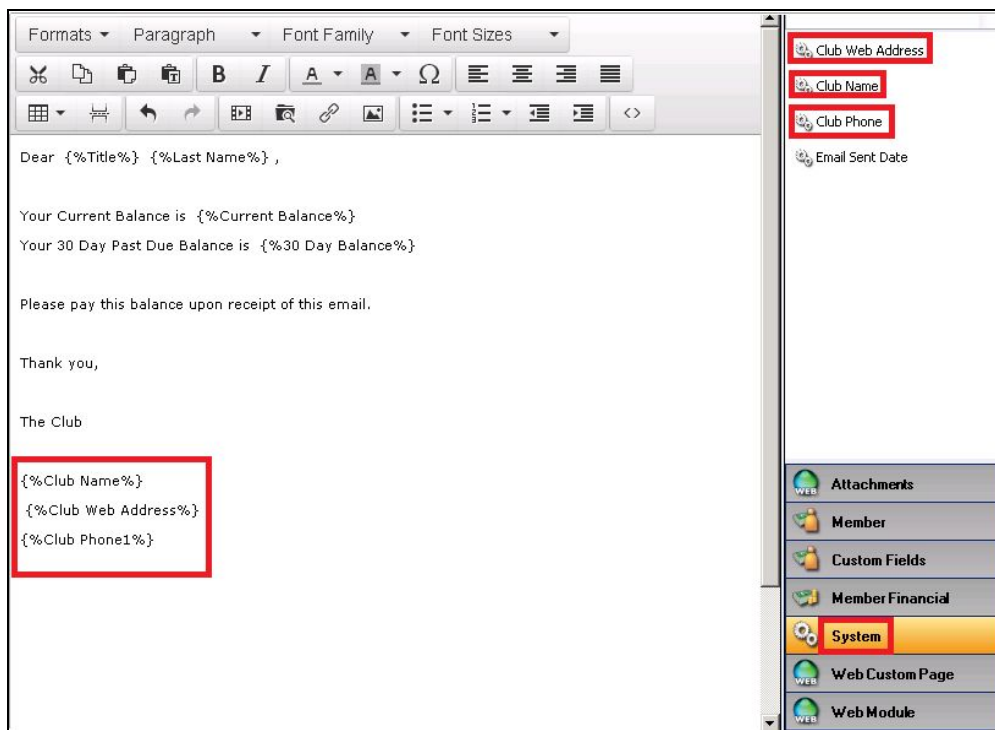
Thank you,

The Club|

The right sidebar lists various data fields available for inclusion, with 'Current Balance' and '30 Day Balance' highlighted in red boxes. Other fields include 60 Day Balance, 90 Plus Balance, 90 Day Balance, 120 Day Balance, 150 Day Balance, 180 Day Balance, Total Balance Due, Minimum Amount, Minimum Spent, and Minimum Ending. Below these are sections for Attachments, Member, Custom Fields, and Member Financial (highlighted in yellow), and a System section at the bottom.

System

Use this plugin to include system information such as the club name, phone number and email address.



The screenshot displays the System plugin interface within a hosted editor. The editor's main area contains a template email with the following text:

Dear {%Title%} {%Last Name%} ,

Your Current Balance is {%Current Balance%}

Your 30 Day Past Due Balance is {%30 Day Balance%}

Please pay this balance upon receipt of this email.

Thank you,

The Club

Below the email text, a red box highlights the following system information placeholders:

{%Club Name%}
{%Club Web Address%}
{%Club Phone1%}

The right sidebar lists various system data fields available for inclusion, with 'Club Web Address', 'Club Name', and 'Club Phone' highlighted in red boxes. Other fields include Email Sent Date. Below these are sections for Attachments, Member, Custom Fields, Member Financial, System (highlighted in yellow), Web Custom Page, and Web Module.

Best Practices

- When working with attachments, Download File allows you to download the file onto a disk while the Document Quick View allows you to preview the document.
-

FAQ

Q:

A: