



New Clubessential Email Editor

2020 - Spring Edition

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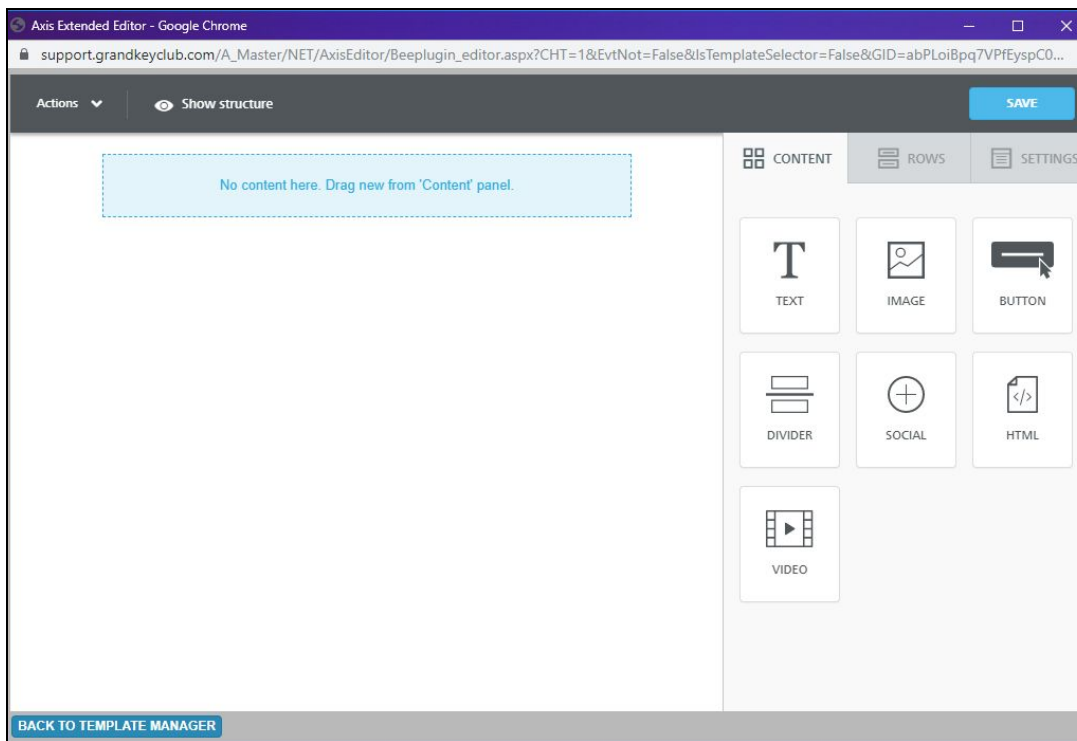
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Overview

The new Clubessential Email Editor allows for email design flexibility offered with the convenience of a drag and drop interface. Easily create stunning emails based on pre-designed templates, or create your own in a few easy steps. The new Clubessential Email Editor separates the concepts of the email body (settings applied to the entire message), structures (rows of the content in the message), and content (text, images, buttons, etc). These elements can be added, removed, or rearranged by simply dragging and dropping options from the content panel to the body of the email.



Accessing the New Editor

To access the email creation tools, follow the steps below depending on your access role.

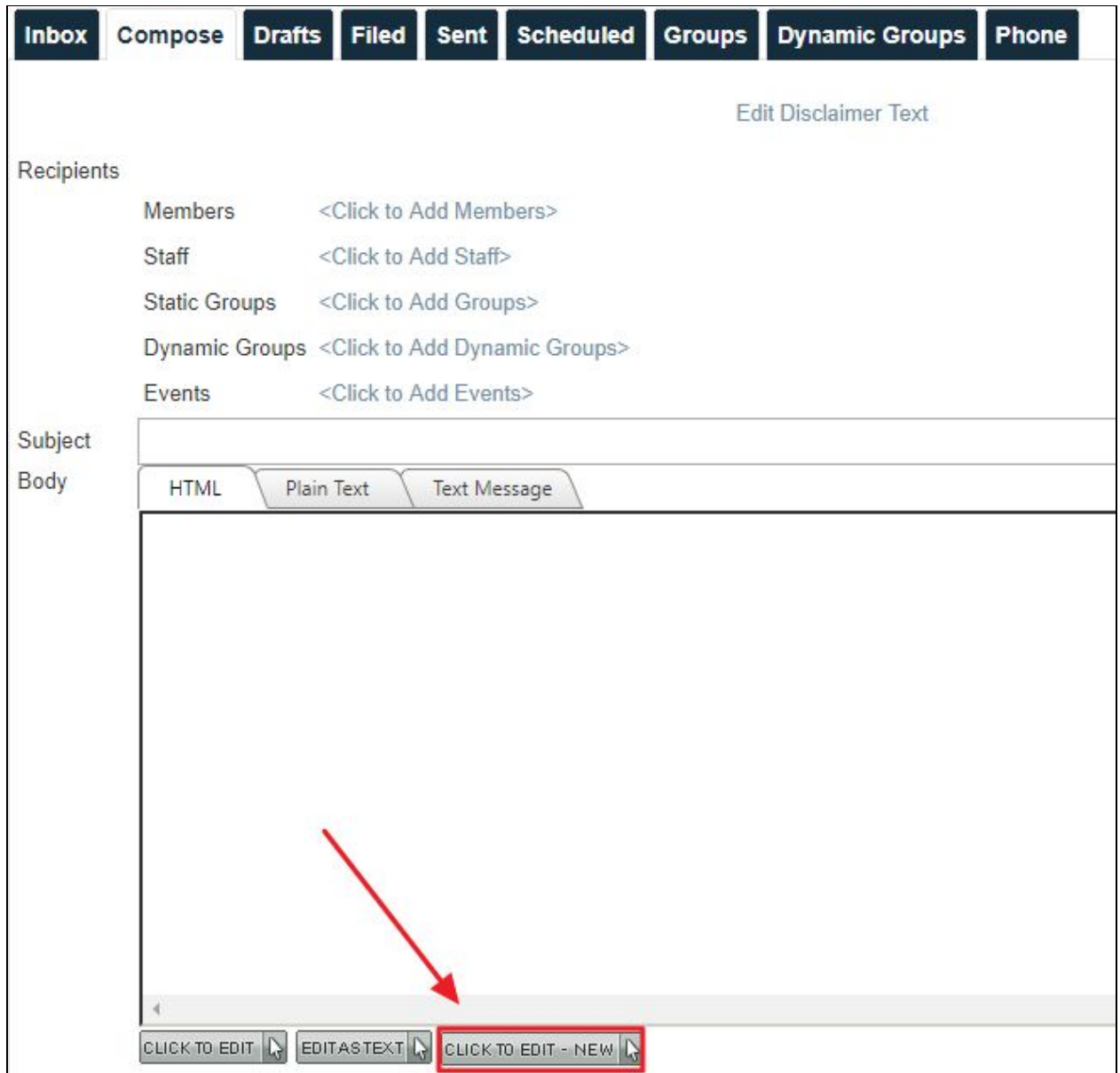
Admins: Hover over the **Admin** bar in the left-hand corner of the screen, select **Compose Email** **Email**.



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



The following Email interface screen will launch.

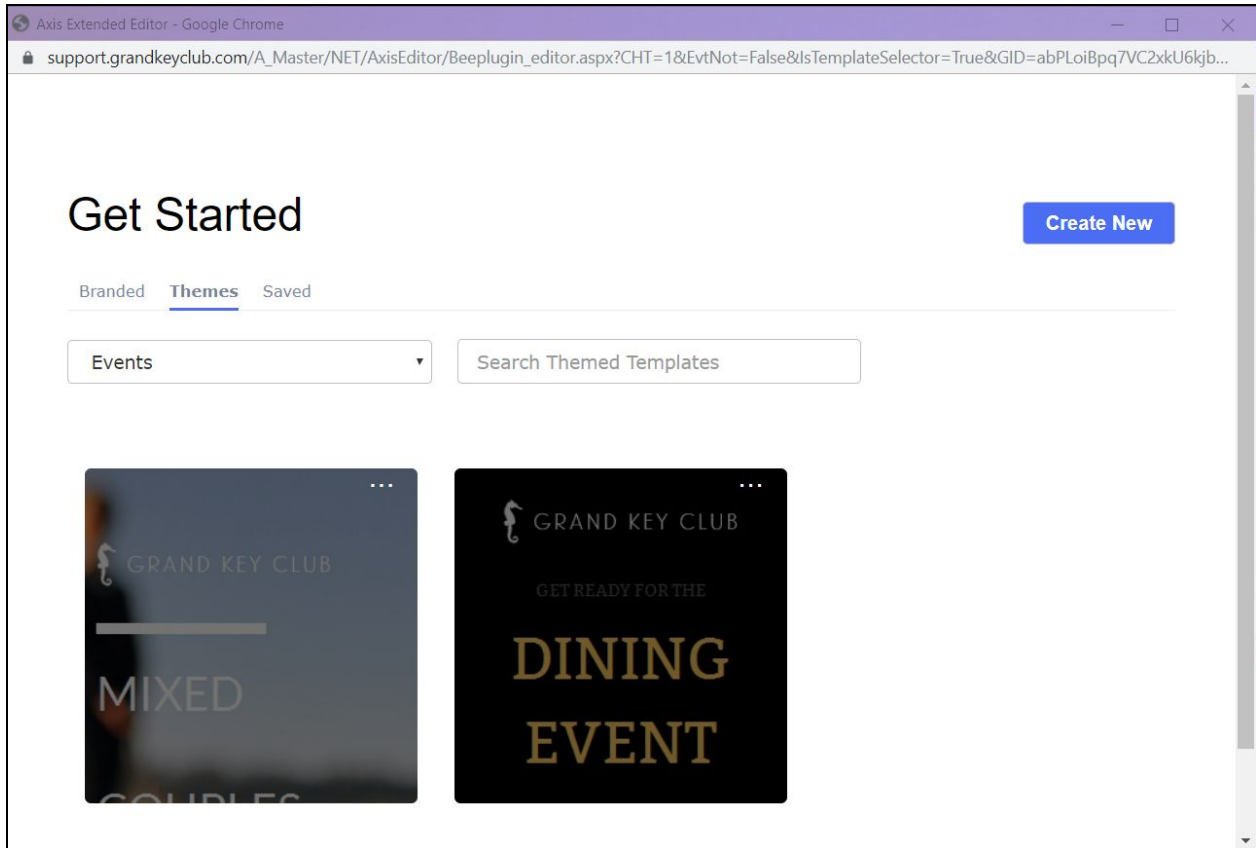


To create an email using the new email editor, begin by clicking the “Click to Edit - New” button on the email compose screen:



Working With Templates

When you first access the new Clubessential Email Editor, you will be taken to the **Template Manager**. This allows you to quickly start an email from a template.



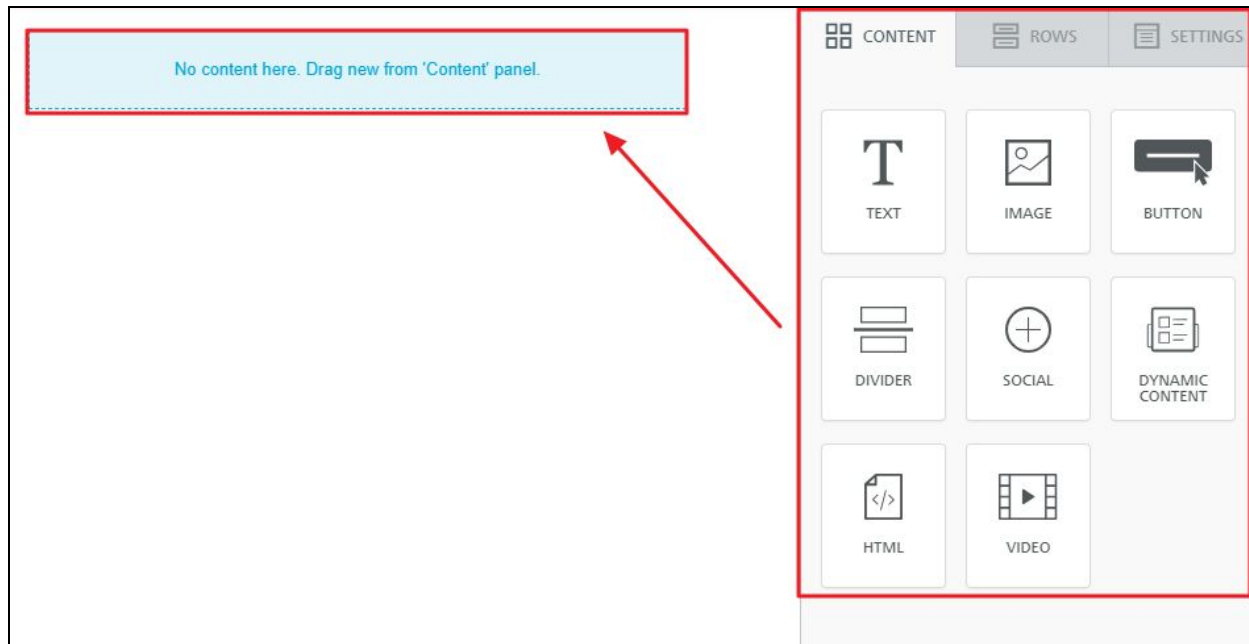
The all-new template manager functions as a repository for all of your new editor email templates, and you can save and categorize all of your templates.

We've also provided a number of themed templates for newsletters, events, and more. You can change the logos and colors on these messages to match your brand to quickly and easily compose a great looking message.

Once you've chosen a template, you can easily edit content, images, and hyperlinks within the template.

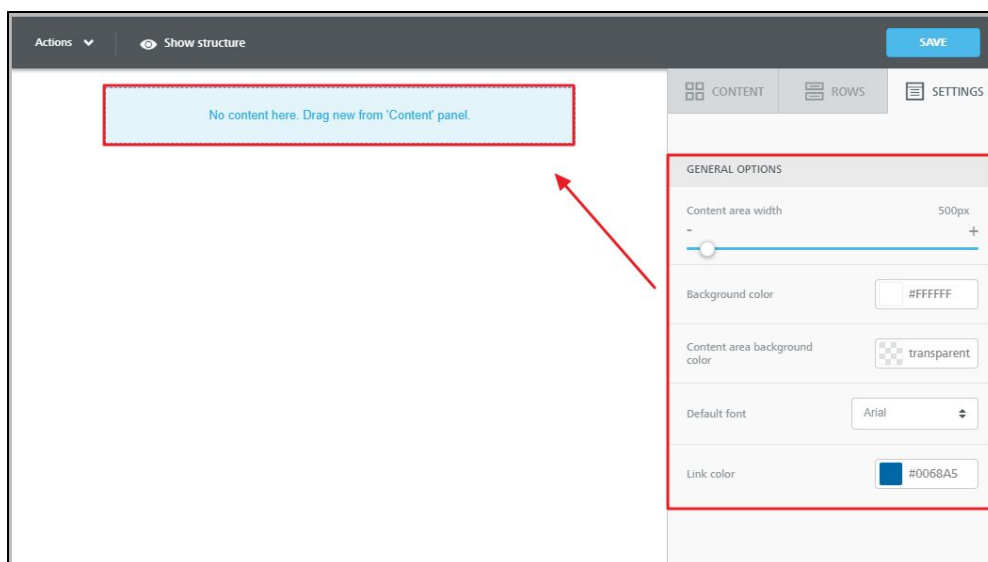
Composing an Email

To begin formatting your email, choose your desired content options by dragging them to the center of the content panel.



Body

The Body of the email is the foundation, by which general settings are applied and inherited by the structure and content blocks. For example, if you choose a certain font within the message settings on the Body tab, then all content will inherit the exact same font type.

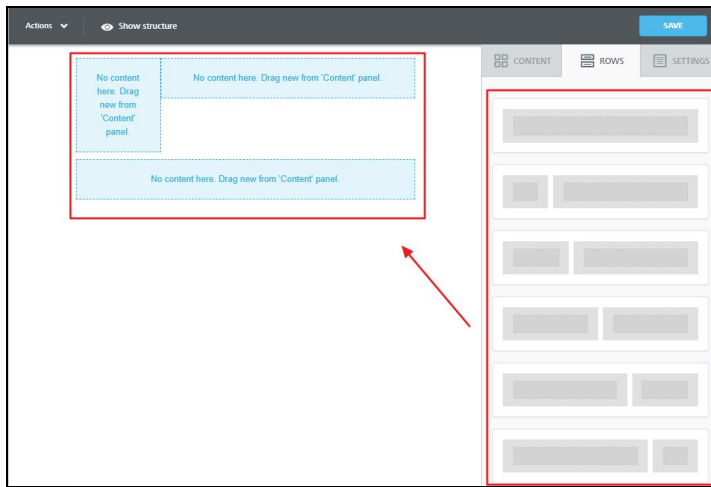


NOTE: While the new Clubessential Email Editor offers the flexibility of customizing your email design, it is important to keep consistency with your designs that reflect the branding for your private club. To access your branding guide for specifications on font and colors, hover over **Admin** > Click on **Style Guide**.

Structure

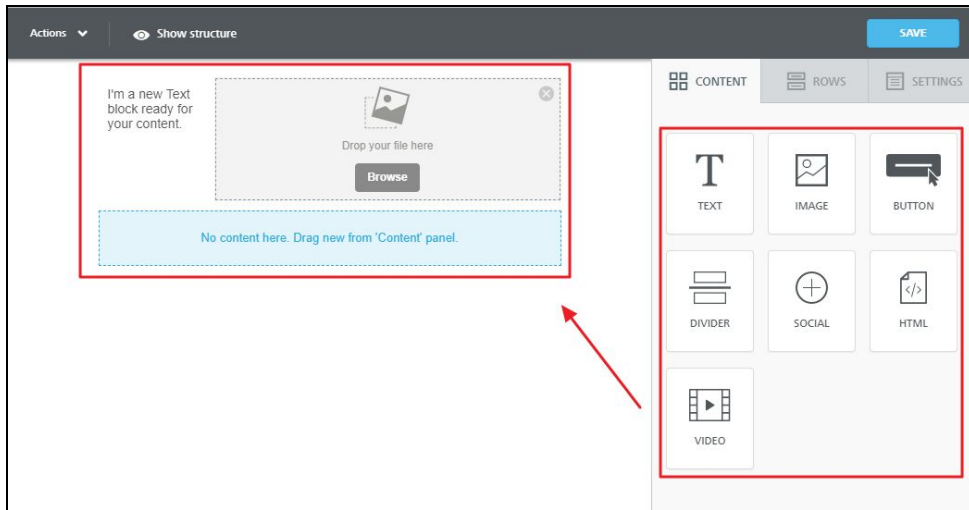
The Rows tab is where you can determine the types of rows you would like to add to the message. The rows will hold various content types within it. Using the row options, easily create one column, two columns, and various sized columns for the body of the email.

Every row will have its own settings, which allows for flexibility in your design. For example, you can select a background color for the entire row, just the message area, or a specific column within it.



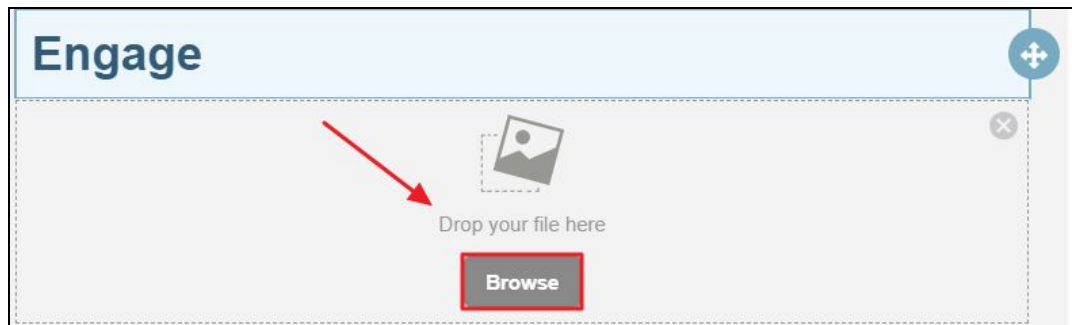
Content

The content tab is where you will add various content elements to the structure. Drag and drop your content options, like text, images, a button, etc. to your structure and then you can begin editing.



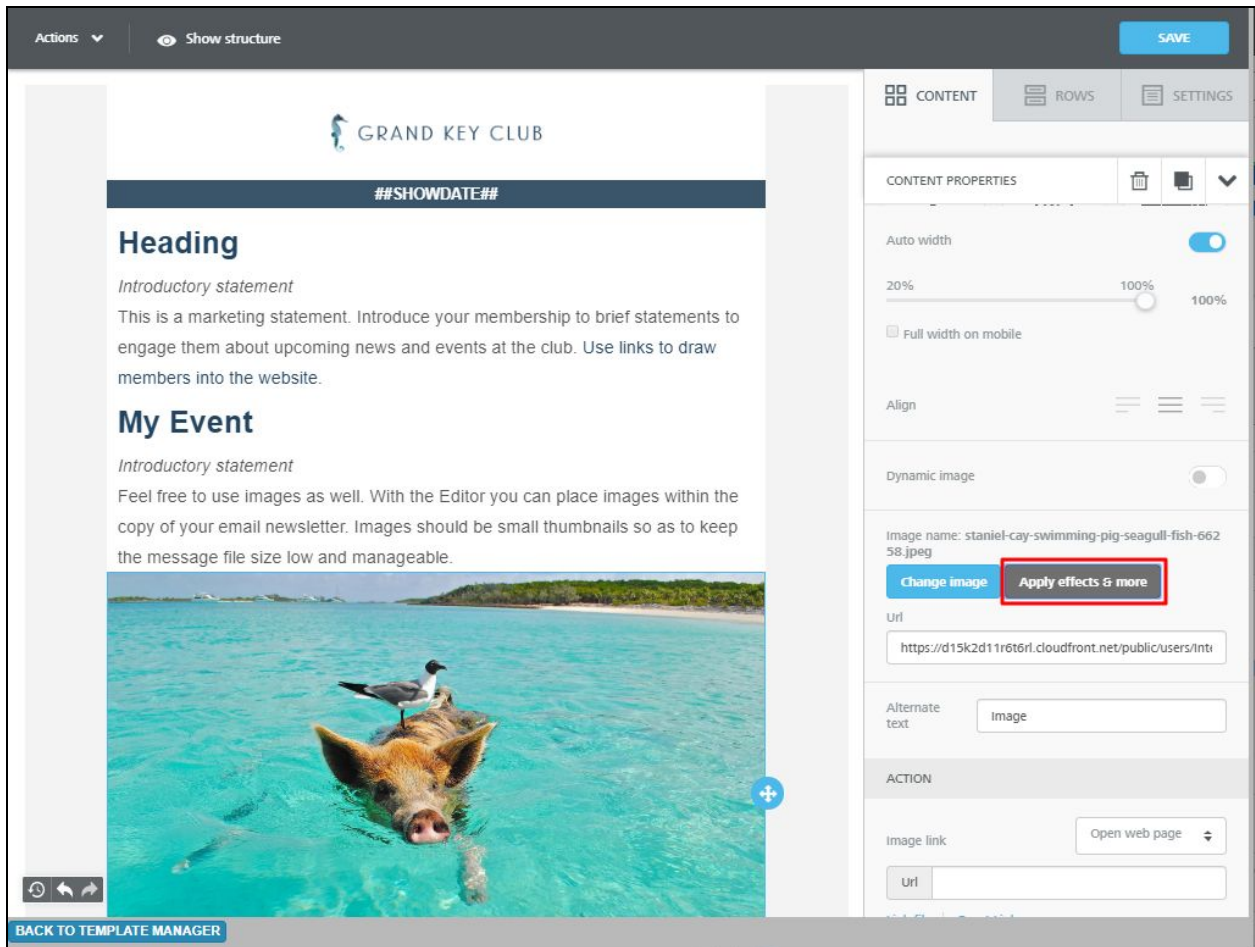
Images

All images used with the new Clubessential Email Editor will be separate from the Image Explorer from the website. Once an image block is added, you can add images by clicking “Browse” or by simply dragging images from your computer to the image block.



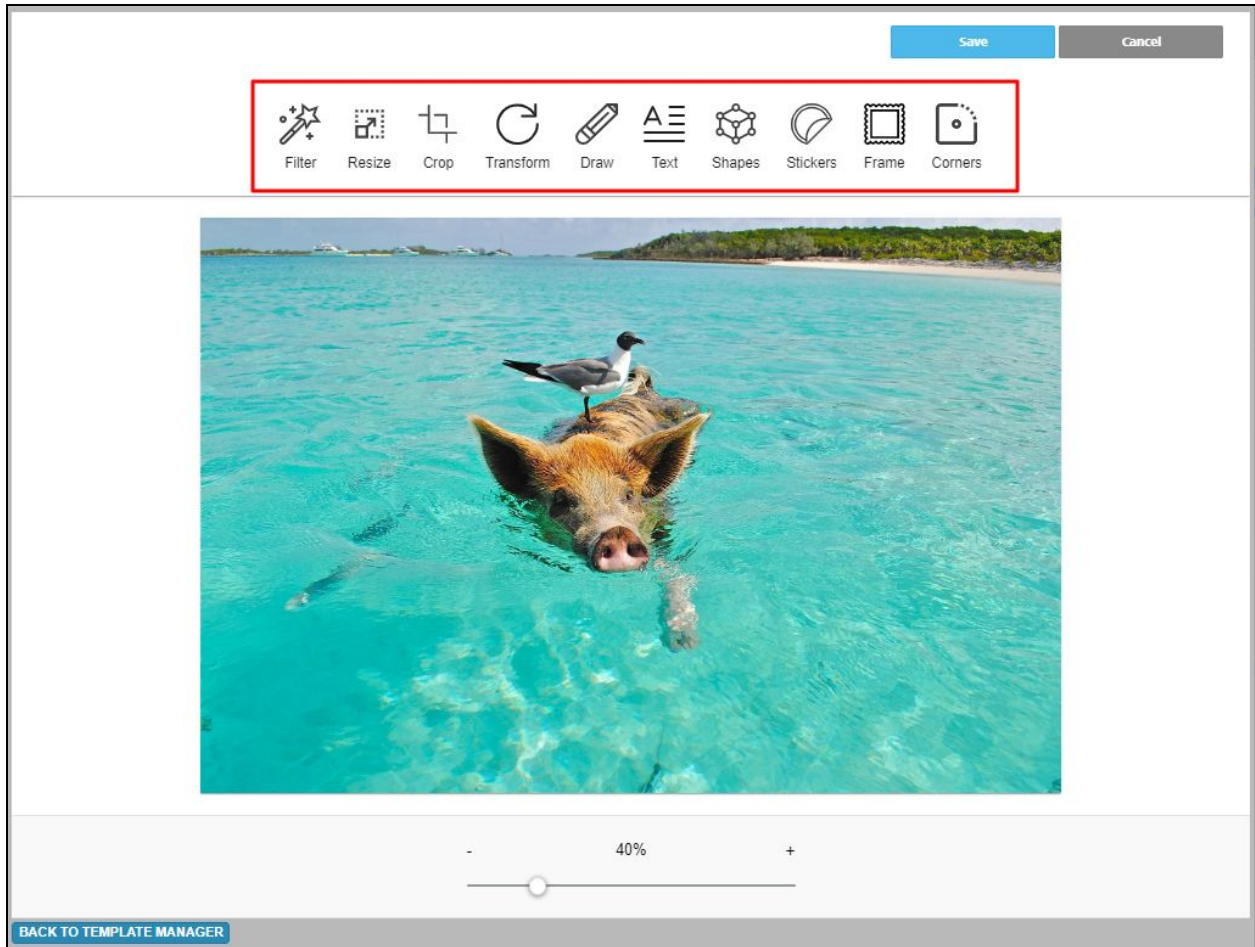
Editing Images

Once an image is selected, the following menu will populate on the right-hand side. To make any changes, select **Apply Effects & More**.



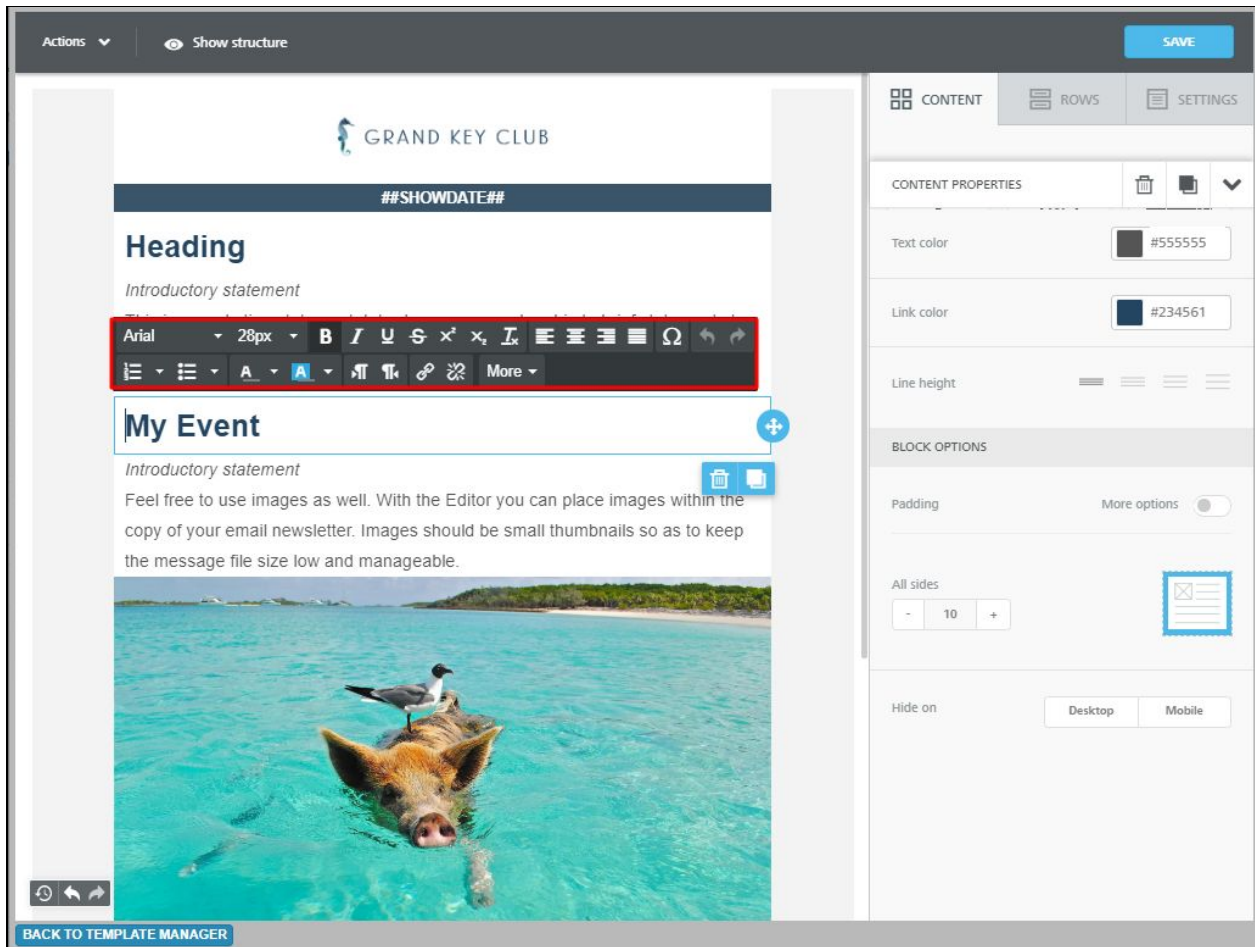
The screenshot displays the Clubessential Email Editor interface. The main content area shows a template for "GRAND KEY CLUB" with a dark blue header containing the placeholder "##SHOWDATE##". Below the header, there is a "Heading" section with an "Introductory statement" and a paragraph of text. This is followed by a "My Event" section, also with an "Introductory statement" and a paragraph of text. A large image of a pig swimming in turquoise water with a seagull on its back is positioned below the text. The right sidebar contains a "CONTENT PROPERTIES" panel with various settings: "Auto width" is turned on, "Full width on mobile" is unchecked, and "Dynamic image" is turned off. The "Image name" is "staniel-cay-swimming-pig-seagull-fish-662-58.jpeg". The "Apply effects & more" button is highlighted with a red box. Below the image name, there are fields for "Url" (containing a CloudFront URL), "Alternate text" (containing "Image"), and "ACTION" (set to "Open web page"). A "BACK TO TEMPLATE MANAGER" button is located at the bottom left of the editor.

The Apply Effects menu will open, allowing you to filter, crop, resize, and more.



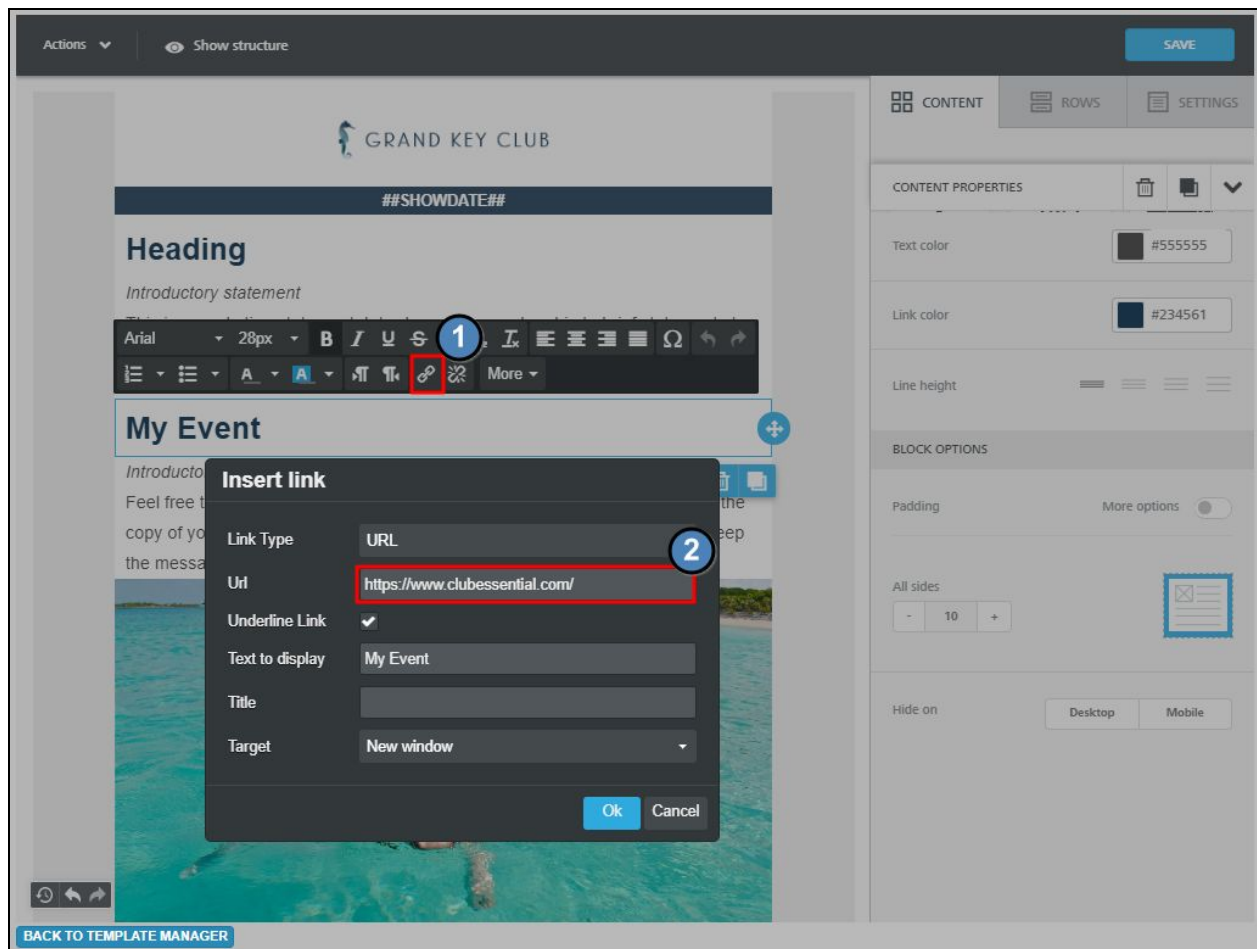
Styling Text

Selecting any text in the email will open a text editor menu, shown here. This menu allows for text stylings like font, sizing, alignment, color, and more.



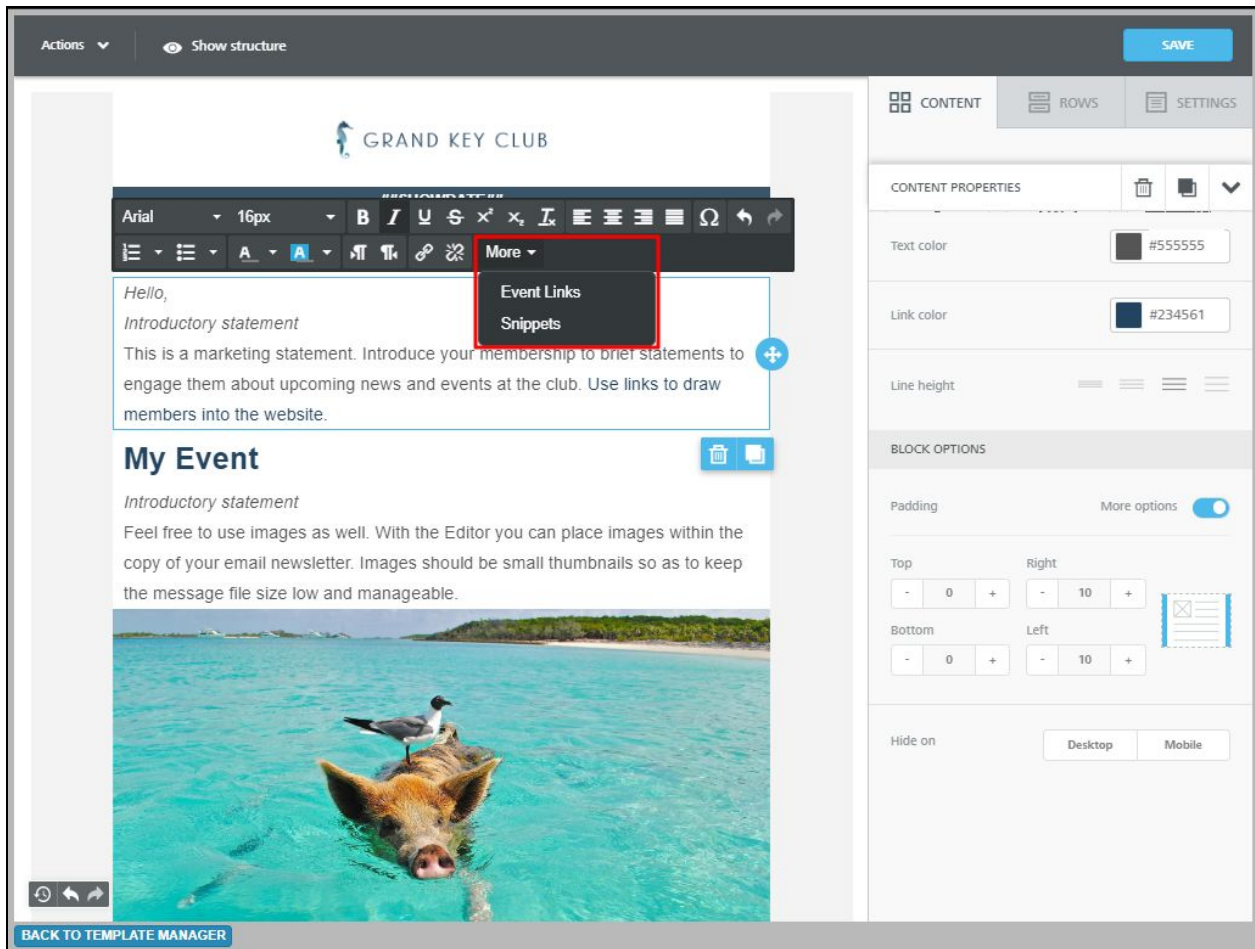
Hyperlinking Text

To hyperlink any text in your email, simply highlight that text and select the **Insert/Edit Link** button on the text styling menu, shown here (1). Next, paste the hyperlink needed into the **URL** field in the Insert/Edit Link menu (2).



Inserting Snippets

Place your cursor within the email text where you would like to insert the snippet. Next, select **More** from the text styling menu. Then select **Snippets**.



The Snippets menu will open. You can then select from a full list of snippets to include anything from Member Name and number to date and time with specific formats.

Choose Snippet ✕

- Site Info
- Date Formats
- Time Formats
- Member Info
- Home Mailing Address
- Away Mailing Address
- Custom Fields
- Interface Links
- Current Month Statements
- Last Month Statements
- Page Info

- Site Name
- Site URL
- Current Date in format "Thursday, April 09, 2020"
- Current Date in format "4/9/2020"
- Current Date in format "April 9"
- Current Date in format "April 9, 2020"
- Current Date in format "Apr 9"
- Current Date in format "Apr 9, 2020"
- Current Month (April)
- Previous Month (March)
- Next Month (May)
- Current Month with Year (April 2020)
- Previous Month with Year (March 2020)
- Next Month with Year (May 2020)
- Last Day of Current Month (30)
- Last Day of Previous Month (31)
- Last Day of Next Month (31)
- Current Year
- Previous Month's Year
- Next Month's Year
- Current Time in format "11:19 AM"

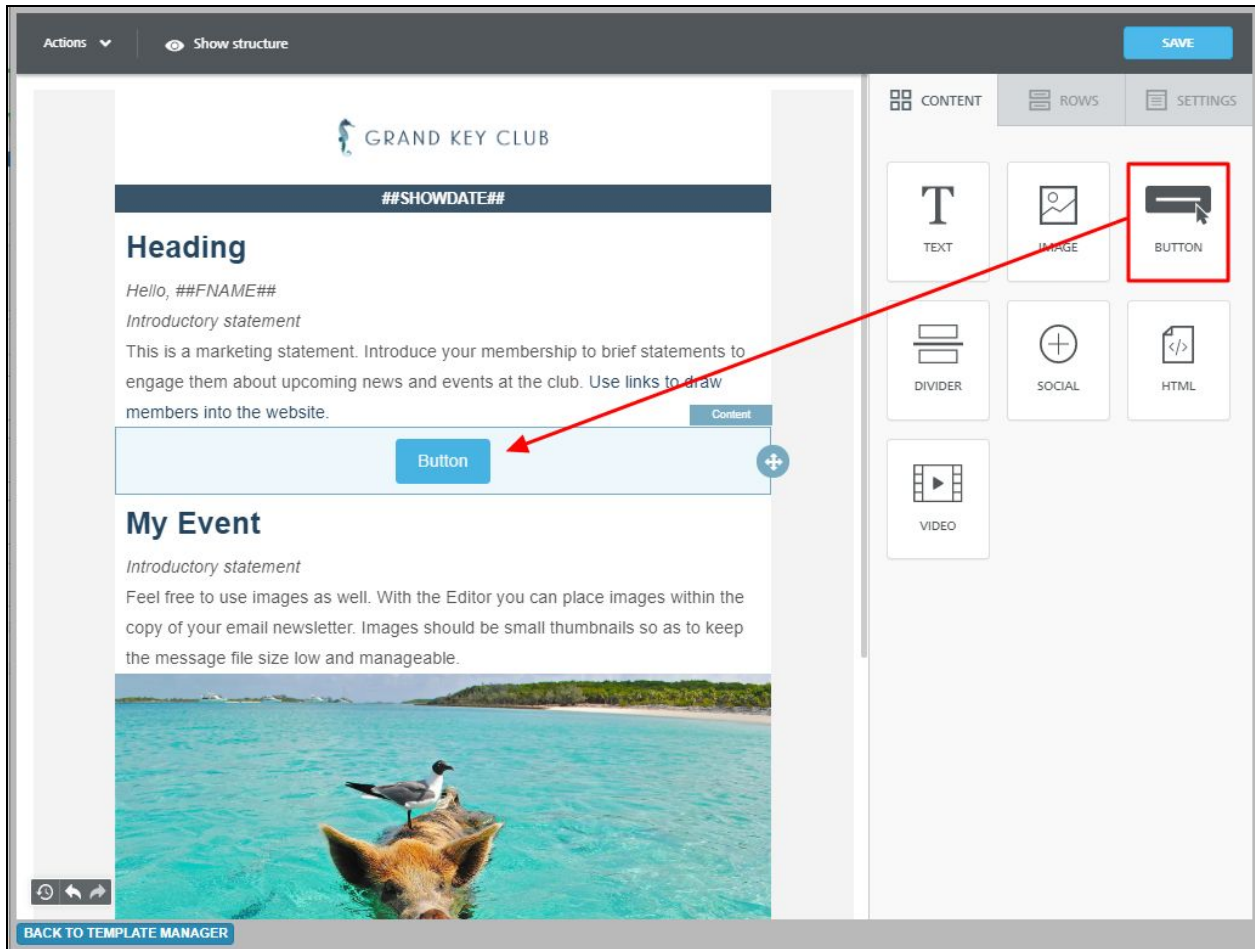
Add Snippet

Once a snippet is selected, click **Add Snippet**. The snippet will show in the body of the email. See example of Member First Name snippet below.

Hello, ##FNAME##

Buttons

Buttons can be added to any email by selecting **Button** from the content section and dragging it anywhere in the email body.



The button can be styled to your liking by clicking the button content in the body of the email. A formatting menu will populate on the right-hand side. From here you can change the color, alignment, hyperlink, padding, and more. The text styling menu will also populate above the button to change font, size, and style.

Actions ▼ Show structure SAVE

CONTENT ROWS SETTINGS

GRAND KEY CLUB

##SHOWDATE##

Heading


Hello, ##FNAME##
Introductory statement
This is a marketing statement. Introduce your membership to brief statements to
engage them about upcoming news and events at the club. Use links to draw

Global Font 16px **B** *I* U ~~X~~ ~~X~~ *I* ↶ ↷ ⌂

Button

My Event

Introductory statement
Feel free to use images as well. With the Editor you can place images within the
copy of your email newsletter. Images should be small thumbnails so as to keep
the message file size low and manageable.



BACK TO TEMPLATE MANAGER

CONTENT PROPERTIES

ACTION

Link type: Open web page

Url:

Link file | Event Links

BUTTON OPTIONS

Auto width:

Background color: #3AAEE0

Text color: #ffffff

Align:

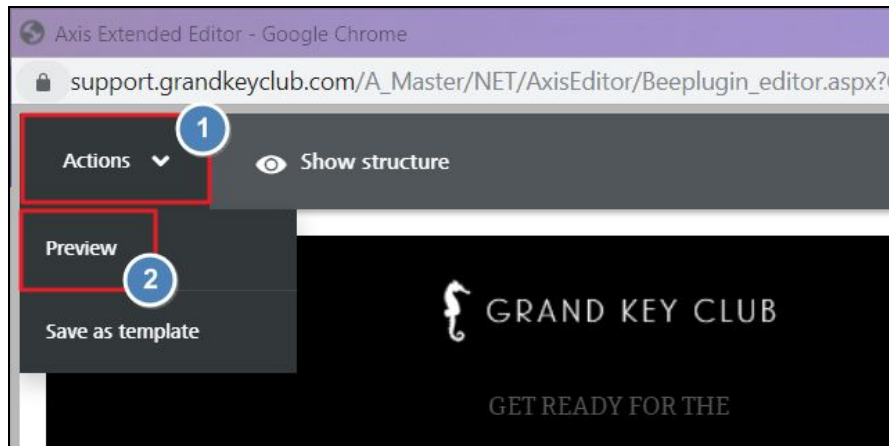
Line height:

Border radius: - 4 +

Content padding: More options

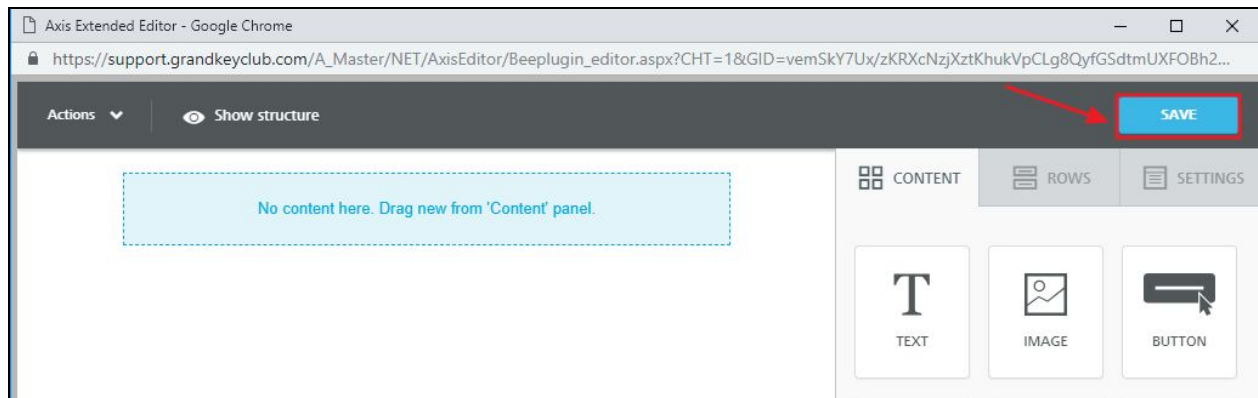
Message Preview

Preview your messages before sending them out with the Message Preview feature. This will allow you to see how the email will display on mobile and on a desktop. Click **Actions > Preview**.



Saving the Message

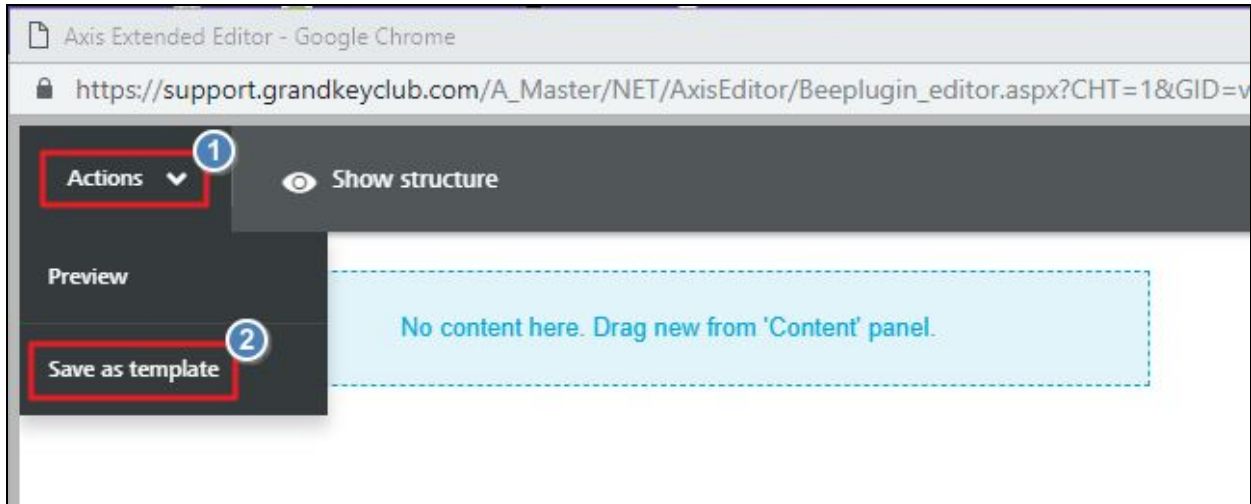
Once your email is composed, you can click the save button at the top right and continue to send the email as you would with the old editor.



NOTE: It is very important that once you have created an email in the new email editor that you **DO NOT** edit the contents with the old email editor, as the content will behave unpredictably. Likewise, inserting HTML content from old email editor templates into the new editor is not recommended.

Saving Templates

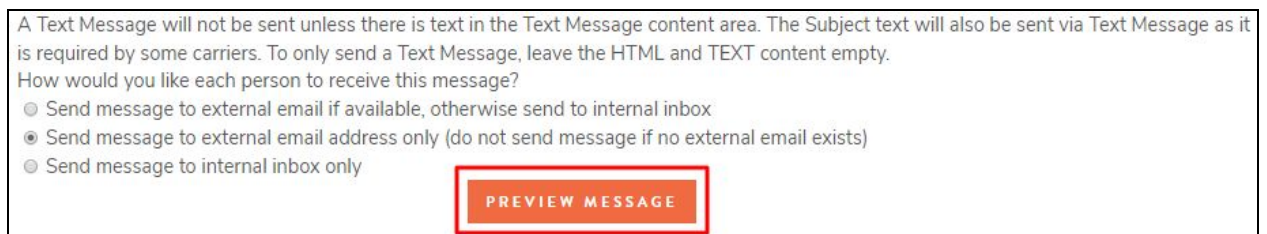
To save your email as a template for future use, use the “Save as Template” option under the Actions menu at the top left.



While the template functionality has changed, you can still save your email as a draft as you would have with the old editor.

Email Delivery Options

When you are finished editing and saving your message you will need to click the **Preview Message** button, located below the click to edit area.



First, designate whether to use Primary Addresses, Secondary Addresses, or Both (as defined in the Member setup in the club directory). The most common (and Default) option is **Primary Address Only**.



Delivery To external email address only (no message sent if no external email address).

Selected Emails Primary Address Only

Primary Address Only

Secondary Address Only

Both Primary and Secondary Addresses

SEND MESSAGE NOW

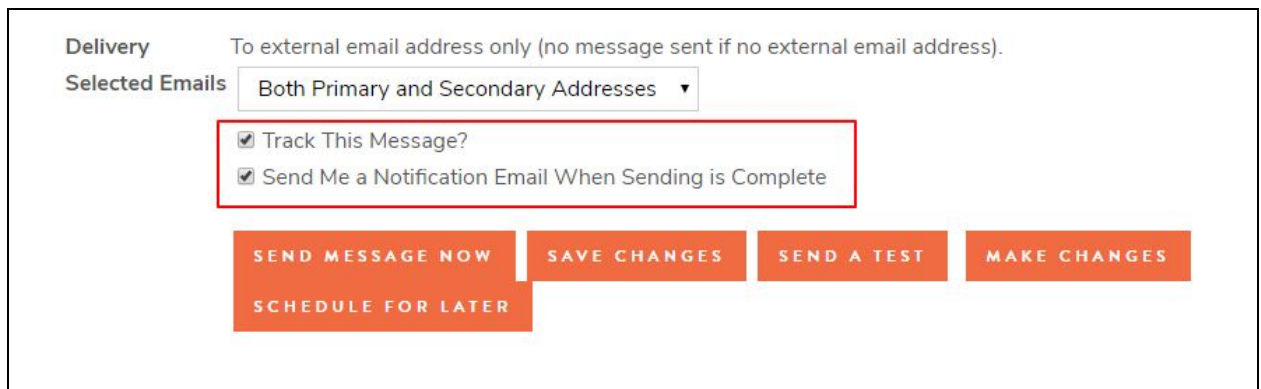
SAVE CHANGES

SEND A TEST

MAKE CHANGES

SCHEDULE FOR LATER

Options also exist to assist with tracking. Designate whether to **Track the Message** (for viewing/delivery statistics within Mail Reporting) and whether you, the message sender, would like to receive a **notification email** when sending is complete.



Delivery To external email address only (no message sent if no external email address).

Selected Emails Both Primary and Secondary Addresses

Track This Message?

Send Me a Notification Email When Sending is Complete

SEND MESSAGE NOW

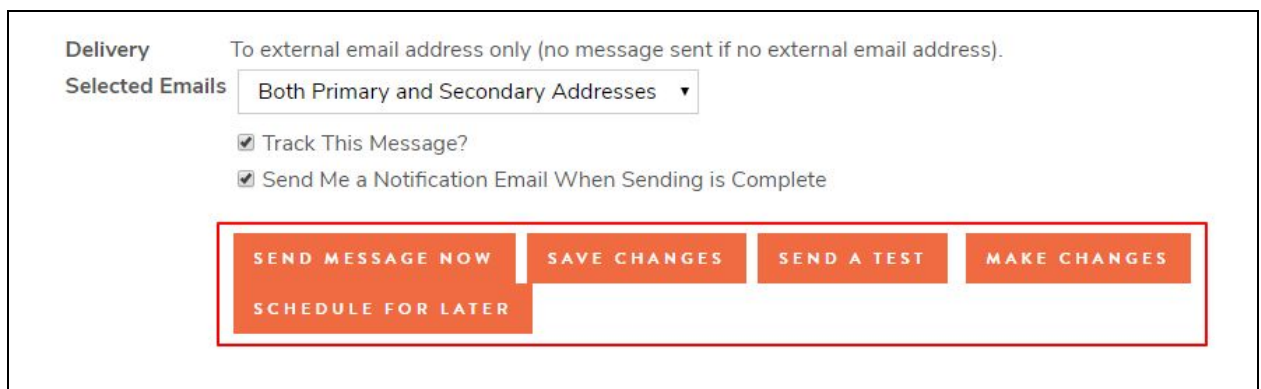
SAVE CHANGES

SEND A TEST

MAKE CHANGES

SCHEDULE FOR LATER

Finally, choose from the following options to define the next steps for deploying your message.



Delivery To external email address only (no message sent if no external email address).

Selected Emails Both Primary and Secondary Addresses

Track This Message?

Send Me a Notification Email When Sending is Complete

SEND MESSAGE NOW

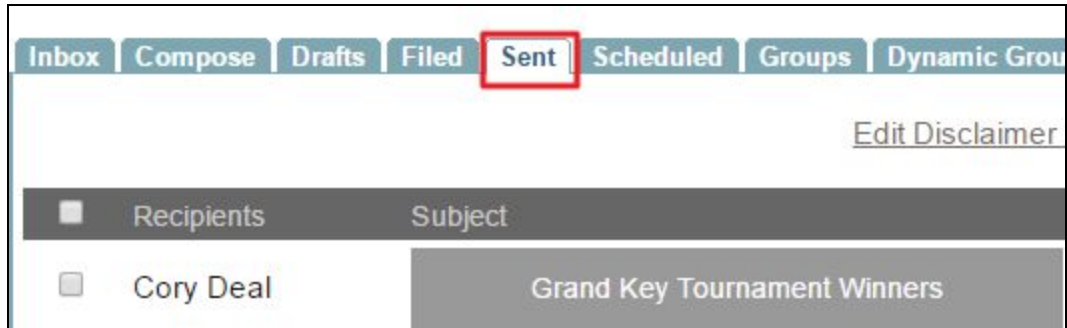
SAVE CHANGES

SEND A TEST

MAKE CHANGES

SCHEDULE FOR LATER

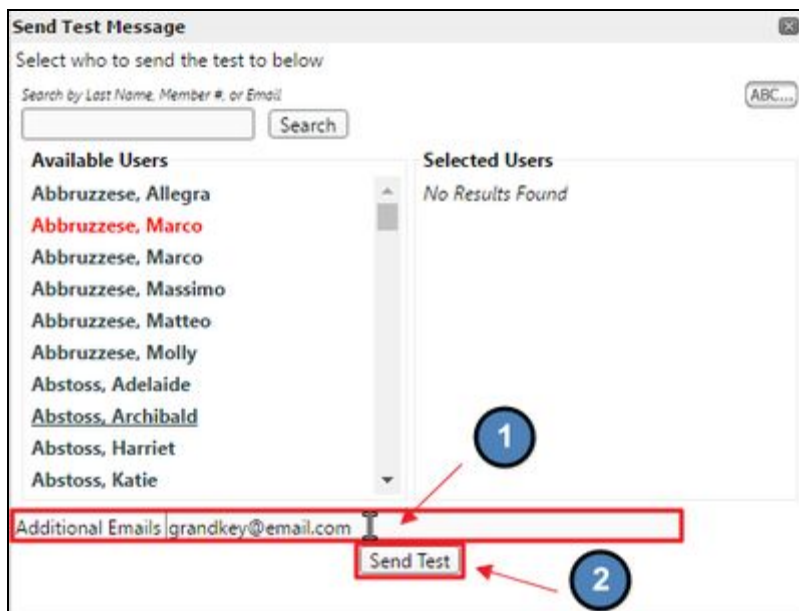
- **Send Message Now** - Sends the message immediately, this cannot be undone. After sent, it will show in the Sent email tab.



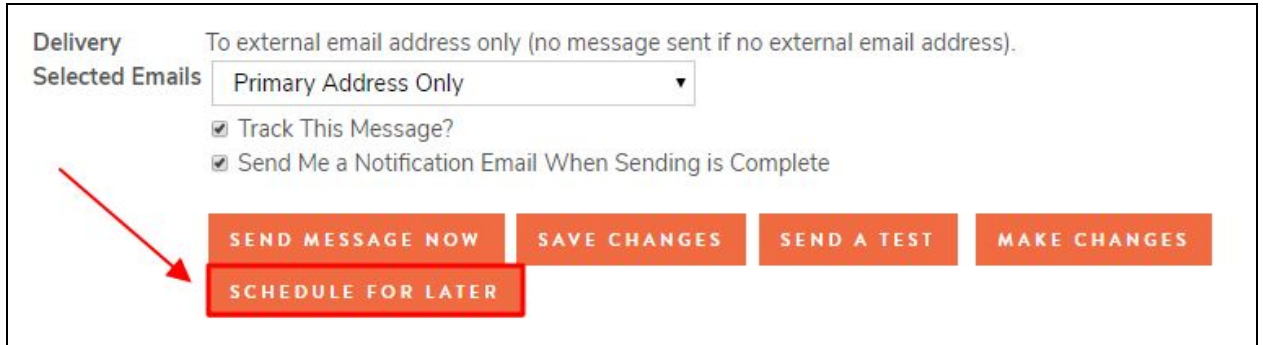
- **Save Changes** - This will place the message in Drafts email tab to revisit later.



- **Send a Test** - This will send a test to selected email addresses. Select an Available User, pulled from the directory, or enter an email address (that can be from outside the system) to receive your test message.

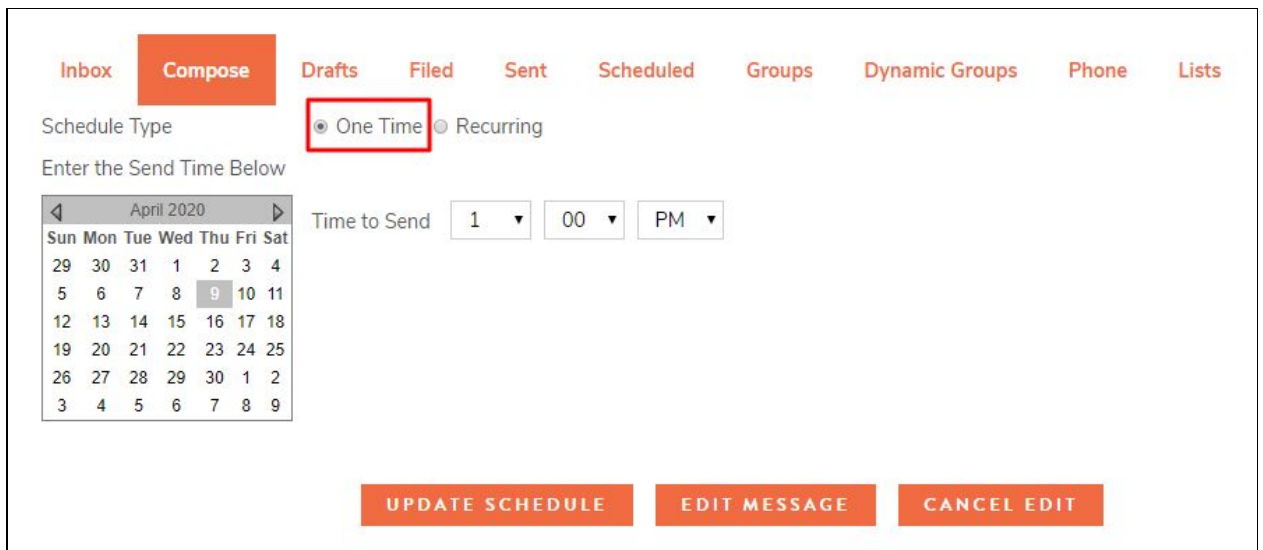


- **Make Changes** - Takes you back to the Compose screen of the Message Center, for further editing.
- **Schedule for Later** - Allows set-up to send the message at a later date and time.



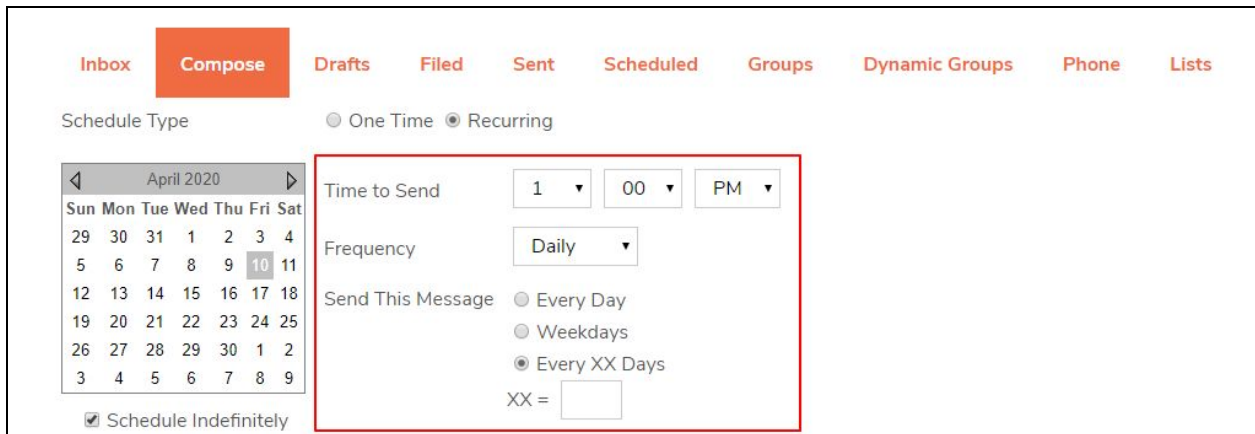
First, you will want to designate whether the email will be sent once, or will be recurring.

For a **One Time** message, simply select the date from the calendar and the time from the drop-downs that you would like your message to go out. Click **Update Schedule** to save and exit.



For a **Recurring** message, you will want to use the calendar to select the first day your message should go out and select the send time from the dropdowns. Then use the **Frequency** drop-down to choose if your message should go out Daily, Weekly or Monthly.

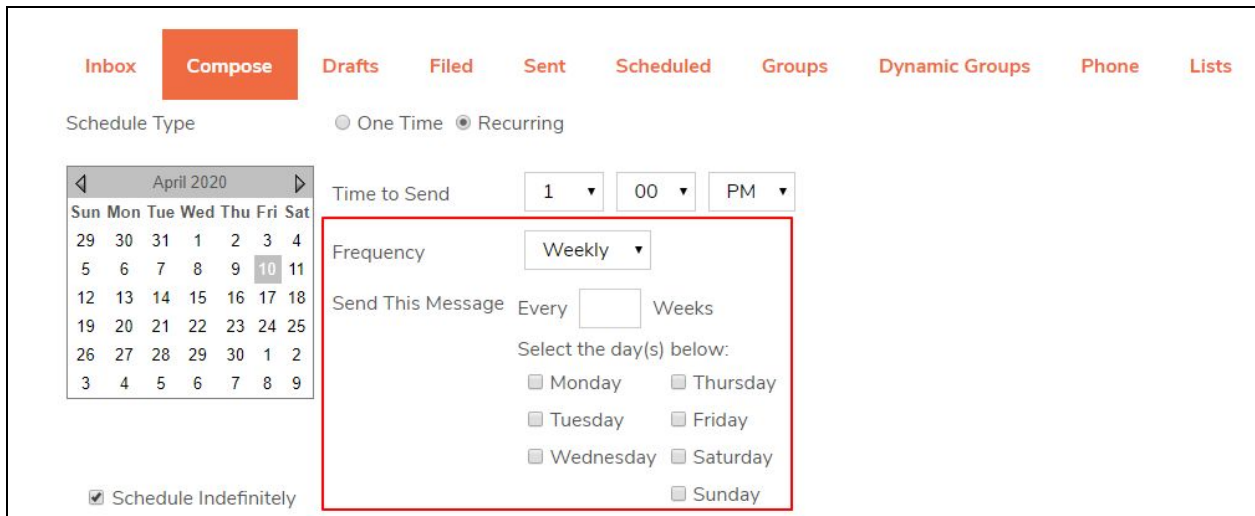
If you choose **Daily**, you can then decide if your message should go out every day of the week, only on weekdays, or on a recurring schedule where you will be asked how often it should be sent.



The screenshot shows the 'Compose' tab of an email editor. The 'Schedule Type' is set to 'Recurring'. A calendar for April 2020 is visible on the left. The scheduling options are:

- Time to Send: 1:00 PM
- Frequency: Daily
- Send This Message: Every Day, Weekdays, Every XX Days
- XX =

To send your message Weekly, select how many weeks there should be between send, as well as which day or days of the week your message will go out.



The screenshot shows the 'Compose' tab of an email editor. The 'Schedule Type' is set to 'Recurring'. A calendar for April 2020 is visible on the left. The scheduling options are:

- Time to Send: 1:00 PM
- Frequency: Weekly
- Send This Message: Every Weeks
- Select the day(s) below:
 - Monday Thursday
 - Tuesday Friday
 - Wednesday Saturday
 - Sunday

The final option is monthly sending. Here you can choose to send on a specific day of each month (the 1st, 10th, 15th, etc) or on a specific day of the week each month, using the drop-downs provided.

And finally, you will want to decide when your scheduled email should end. The **Schedule Indefinitely** box is checked by default. If you uncheck this box you will be able to use the second calendar to decide a stop date for your recurring message.

Click **Update Schedule** to save and exit.

You can also click **Edit Message** to be taken back to the first Compose screen of the Message. You can also click **Cancel Edit**, to cancel the sending of this message.

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

Schedule Type One Time Recurring

Enter the Send Time Below

April 2020						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2
3	4	5	6	7	8	9

Time to Send

UPDATE SCHEDULE **EDIT MESSAGE** **CANCEL EDIT**