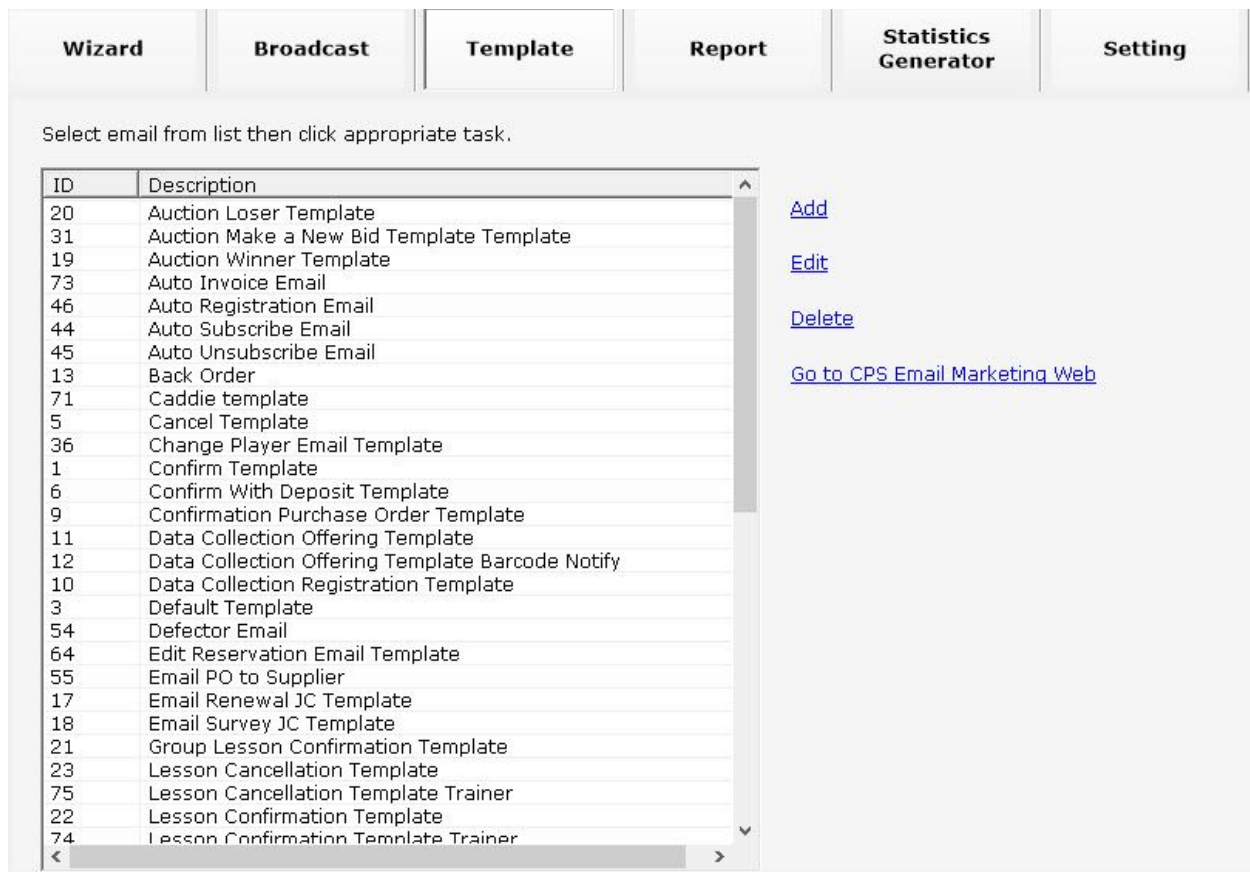# Email Marketing

The Email Marketing module is a full emailing feature capable of targeting specific customers. It contains an email template tool that allows you to build emails prior to sending them out, and also save the templates to use again at a later date.

Template Setup

The first part we are going to go over is the creation of an email template. In the email module, this is under the Template button at the top of the screen.


You will notice that there is already several default templates in the list that are available to use. From this screen you can add a new template, edit an existing template, or delete unwanted templates. We will take a look at the Cancel Template.

Above is an example template. It has many of the basic features you would expect such as being able to bold and align text, change font size and color, etc. You can modify who it was sent from and the subject line of the email. You can also add email addresses as a BCC. **NOTE: Any email address placed in BCC will get a copy of the email every time it is sent.** This is handy if you want to have a separate email account just for backups of emails sent out.

You may also notice the terms that are in brackets and in capital letters. These are called Key Fields. They are used to pull up individualized information for each email in the email blast. For the example above, [PLAYERNAME] will be replaced with the player's name who canceled the booking and [PLAYDATE] will show the calendar date of when they were scheduled to play. This is convenient when sending out mass emails at once, but want to make the email more personalized.

To add a Key Field to the email, first press the Key Fields button toward the top of the template page. This will add a box of Key Fields to the top right corner of the screen.
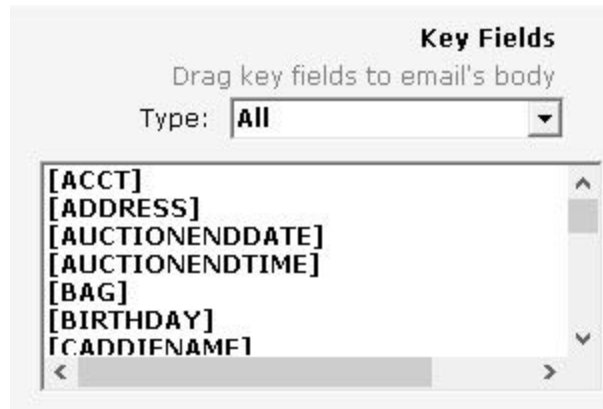
Now, simply drag the Key Field you want from the box and place it into the email. Alternatively you could type the Key Field into the body of the email and it will also work.

If you want to dive into the code behind the email, you can do so with the HTML button at the bottom of the screen.


This changes the body of the email to the code version. You can go back using the Design button next to the HTML button. If you want to use a third party email creating tool, so long as the tool has the ability to export html code, you can import their code here and be able to use the email you created from our software.

Once you are happy with your template, just scroll to the bottom and hit save! This will take you back to the original templates page where you could work on an additional template.

Email Wizard

Now that we have templates created, we can use them in the wizard to send out email blast to our customers. In the email module, this is the first tab at the top called "Wizard". I will be using the Confirm Template as an example.
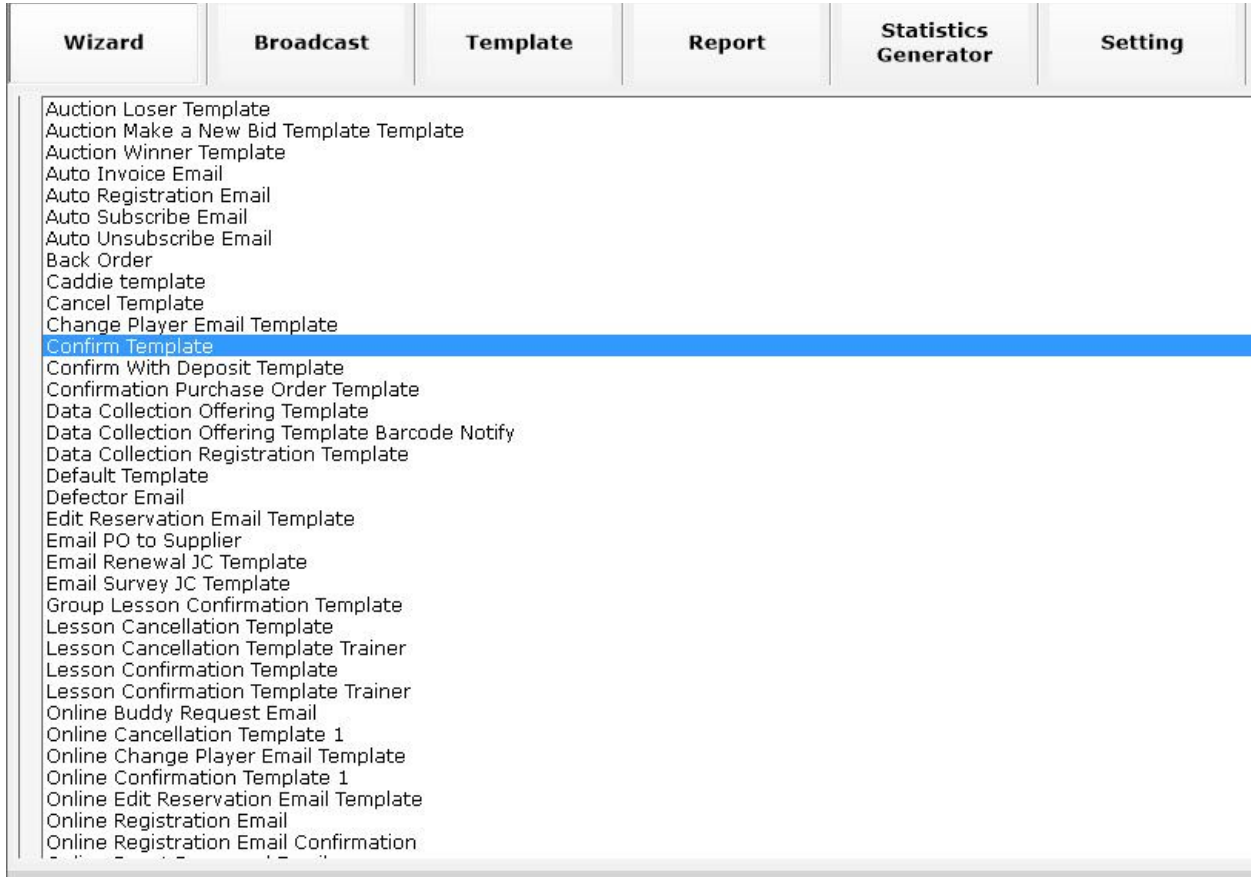
After you pick a template that you want to sent out, you will be presented with three different options.

These options allow you to target different groups of customers. The Target Player List will pull up email addresses for anyone who is marked as a player in Starterhut. These are NOT customers in the customer module. This list is found in Starterhut > Admin > Golfers > Player. The second option, Target Buyer List, will let you target customers who have or have not bought specific products. Finally, Target Customer List will let you target customers who are in the customer module. For this example, we will be looking at the Target Customer List, but all three work similarly.

In this case, I wanted to email just people in the Test Class. Notice, it is currently only set to customers who are in the store Golf Shop. If i wanted to get emails from people who are in either Golf Shop or in the F&B store, I can hit OR at the top right to add an additional filter box.

Now that OR is pressed, I can change either side to get the desired results that I am looking for. Since I am looking for only people in the Test Class that are part of the Golf Shop or F&B, I set the customer class on both sides to be Test Class. Once I have the filter that I am looking for, I scroll to the bottom and hit the next button.

The next screen will display all of the appropriate emails that fit the filter from the previous screen. From here you can hit Select All for all of the email addresses, or pick individual ones. Once you have the selection you want, hit next at the bottom of the screen.

To:	test@test.com
CC:	
* BCC:	

* You will be copied on every email sent with this template. Ex: If email is sent to 100 people you will get 100 emails.

| Subject: | TeeTimes Confirmation |
| Attach: | |

View **Key Fields**

Email Detail:

Dear [PLAYERNAME]

Thank you very much for choosing Presidio!

Download our new Free App to enjoy free GPS, scoring, and news!

Loyalty is Rewarded at Presidio! Be sure to ask how you can earn points towards free golf, lessons and a free end of year golf tournament.

All rates are based on individual residency. Each guest will need to show a form of ID to receive the appropriate residency rate.

Course	[COURSENAME]
Date	[PLAYDATE]
StartTime	[STARTTIME] for [PLAYERINRESERVATION] players

The next screen is the final step to sending out the email blast. It is a final chance to look over the email you are sending out. The To: field should be filled in with all of the email addresses that you selection from the previous screen. If you want someone to get a copy of every email that is sent out, you can use the CC and BCC filters. The subject of the email can be changed, which is useful when reusing templates that may have the year in the name. Next, an attachment can be added to the email using the ellipses at the end of the attachment line. **Note: Adding an attachment can increase the time it takes to send out emails by a significant amount depending on the file size**. Finally, the body of text is displayed so you can modify the message prior to sending. When everything is set correctly, hit the send button in the bottom right corner.

Email Report

Now that we have sent out our emails. We can now look at the Report button to see the status of the emails that we sent out.

First, we must set the dates to the appropriate range we need. Next, the status option lets you filter out specific statuses, so if you only are interested in emails that failed to send, you can change it to the Failed status, for example. The last option , From Email Marketing Tool Only, will display only emails that came from this module when checked. If it is unchecked, additional emails will show up such as tee time confirmation emails. Once all the filters are set, hit View Report.

As you can see, the test email I had just tried to send is still in progress. If I were to run this report again later, it will either change to Sent or Failed depending if it makes it through or not. If this was a tee time confirmation email, or other automatic email, it would display it as such in the notes field.

Statistics Generator

An additional feature in the Email Module is the Statistics Generator. This can be used to generate a list of email addresses of customers who have purchased specific products. This is very similar to the Target Buyer's List mentioned above in the Wizard section. When you click on the Statistics Generator button, you are prompted with a filter to pick specific products, categories, or suppliers. You can set it so that the items selected is what the customer did or did not purchase during the specified time frame, giving many marketing options.

In the example above, we are looking for all customers who bought a breakfast item in the past 3 months. Same as before, if we wanted to add additional conditions to my selection, we can pick the AND or the OR option to create another column of filters. Once the selection is correct, hit the next button in the bottom of the screen
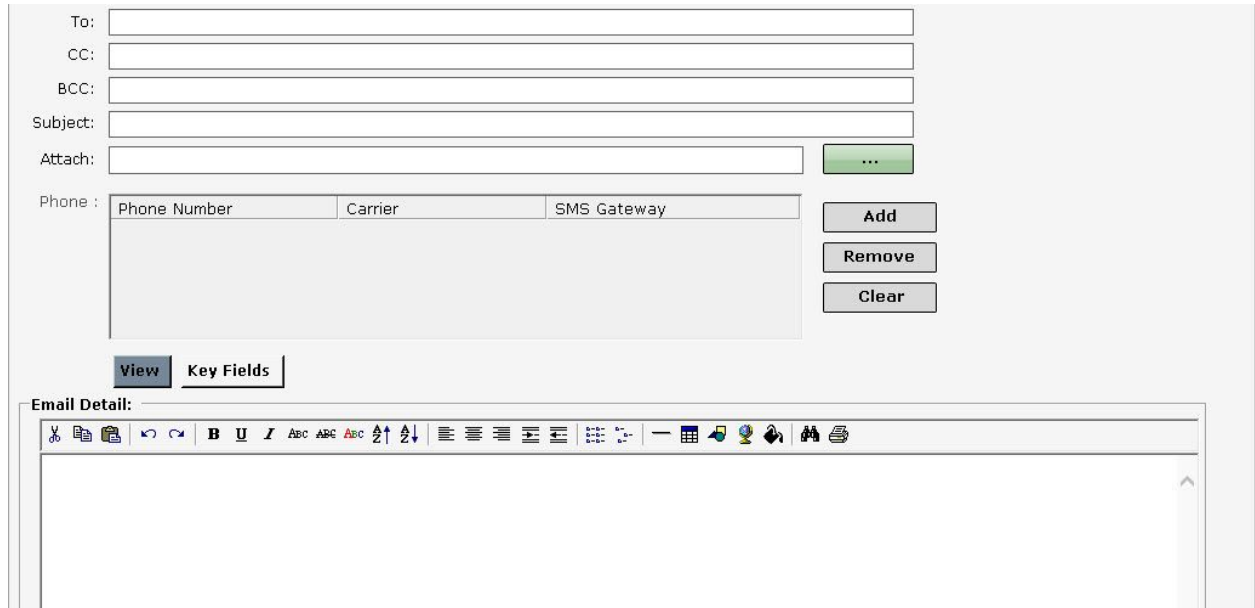

The next screen will show you the list of emails that meet the criteria from the previous screen. From here, you can either send an email to those addresses, or you can export the list to excel.

Broadcast

The broadcast feature is a basic email sending tool. If you are looking to send out a quick email from the system without having to create a template or step through all the filters, then the broadcast tool is what you are looking for.

Like the other emailing tools, you can use this broadcast emailer to also add an attachment and add additional people to send the email too via the CC and BCC option.

Settings

1. This is the name that will display as the sender of the emails from the email module. Please change it to the name of your golf course.

2. These are the settings used to connect to an SMTP server. Only change these settings if you would like to use your own SMTP server instead of the one that we provide.

3. This is the email address that any replies will go to. If you do not wish to receive any reply emails, feel free to use the one listed above.

4. This is the port that we will use to send out emails from. the default is 25, but we also commonly use 587. If you use your own SMTP server, this could vary. You may also need to set the SSL option depending on how your network is setup.

5. These are the Image hosting settings. This is used for adding pictures into emails. Do not change these settings unless you plan to use your own image server.

6. If you have the Email Marketing Web module through us, you can use to add the link to it in our software. Any link placed in this field will be tied to the "Go to CPS Email Marketing Web" button under the Template tab.

Auto Email Settings

Membership Renewal Email Setup

☐ Membership Renewal Email   0 ⬍   days prior to the Membership Expire Date. **1**

☐ Membership Renewal Email   0 ⬍   days prior to the Membership Suspend Date. **2**

    ☐ Send a reminder every   0 ⬍   days until the membership is either Renewed or Terminated. **3**

Default Email Template   [▼] **4**

Pre-Paid Email Template   [▼] **5**

ACH Email Template   [▼] **6**

Other

ACH Rejection Email Template   [▼] **7**

1. This will send an email reminding members to renew their membership prior to the expiration date of their membership.

2. This will send an email reminding members to renew their membership prior to the suspension date of their membership.

3. This will send out a periodic reminder to renew their membership passed their expiration date.

4. This will be primary template that is sent out for the membership renewals