CLUB CADDIE

a *Jonas* Software Company

Email Marketing Training

Managing Contacts + Lists in
the Email Marketing Tool

Email Marketing Training

Courses

1. **Managing Contacts and Lists in the Email Marketing Tool**

2. Create your First Email

3. Send your First Email

4. View tracking reports for your First Email

Managing Contacts and Lists in the Email Marketing Tool

Managing Contacts and Lists

Syncing Data from Club Caddie

The first and most important step in the set-up process, is the syncing of your customer data from the Club Caddie platform to the Club Caddie Email Marketing tool. By setting up this sync, whenever a new customer is added in Club Caddie, it will then sync into the Club Caddie Email Marketing tool, at which point you can begin to connect with that particular customer.

Don't worry either, you'll not be responsible for setting up this sync. Someone on the Club Caddie Onboarding team will ensure that the sync is set-up correctly and that the data is flowing from one to the other.

Managing Contacts and Lists

Sync Customers

The most important part of the sync is the transferring of all of the customers and their associated information fields that you require to email them. The first and last name, as well as email, is the obvious information that's needed. You can also pull over various other fields from Club Caddie into the email marketing, to better filter the fields, helping in the process of creating specific lists.

The great thing is, once you have done the sync for the first time, any new customer that is created in Club Caddie will sync into the email marketing tool, eliminating the need for manual exporting and importing of customer information.
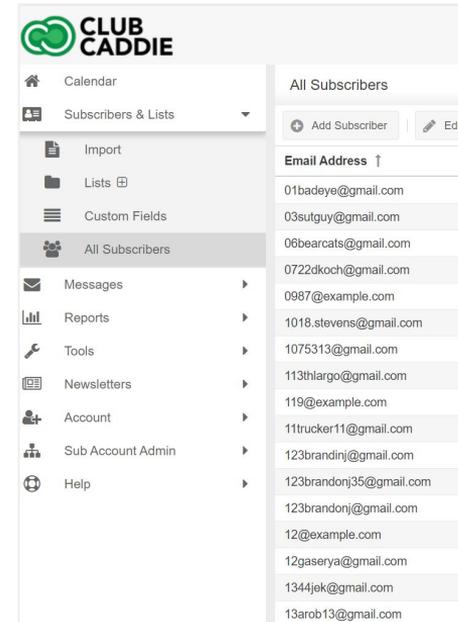
Managing Contacts and Lists

Sync Lists

When sending emails from a email marketing tool, you're not going to send the same email to everyone on your mailing list. More often than not, you'll be sending emails to a specific group of people, or a list of people. These lists can be based on a membership type, a birthday, a group, or league that play every week, etc. These lists are meant to allow you to focus your correspondence on one specific group.

Within Club Caddie, you're able to create lists that can sync to the email marketing tool, eliminating the need create the list once in the emailing platform and saving time.

Managing Contacts and Lists

Sync Custom Fields

Custom Fields are identifiers that allow you to differentiate one customer from another. It's also a great way to segment people into specific categories, making it easier for a golf course marketer to target a particular audience in their email marketing.

These custom fields are built in Club Caddie and can be synced to the Email Marketing tool. These fields can include anything specific to the player including, name , last visit, Zip Code, State, Gender, Date of Birth, etc.
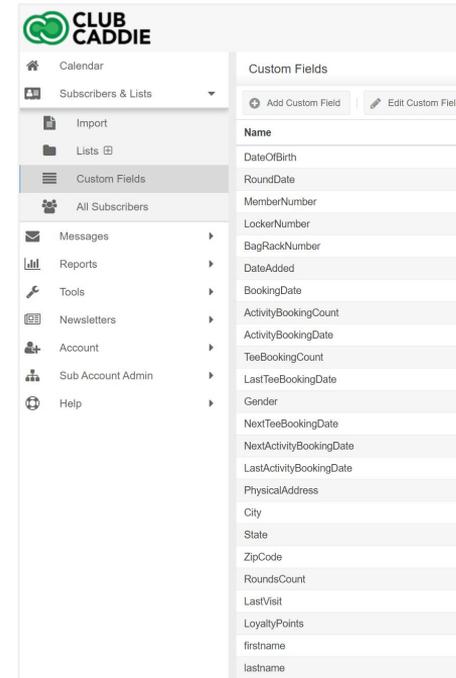
Managing Contacts and Lists

Lists in Club Caddie Marketing

When sending emails to your subscribers, in most cases you'll have a target audience in mind that you're wanting to target with the email. By using lists within Club Caddie Marketing, you'll be able to have pre-built mailing lists for many purposes, that will allow you to send a specific email to a specific audience.

Great examples of lists often seen at golf courses, could include, but not limited to: Monthly Birthday Lists, League Player Lists, Membership Types Lists, Social Outing Lists, Activities User Lists, etc.

List Name	Description	List Owner	Active Subscribers	Unsubscribed
December Birthdays		Allison George	153	0
November Birthdays		Allison George	159	0
October Birthdays		Allison George	191	0
September Birthdays		Allison George	173	0
August Birthdays		Allison George	208	0
July Birthdays		Allison George	264	0
June Birthdays		Allison George	243	0
May Birthdays		Allison George	190	0
April Birthdays		Allison George	223	0
March Birthdays		Allison George	193	0
February Birthdays		Allison George	164	0
Two day Before Tee Time		Allison George	0	0
Two Day Prior to Sim Booking		Allison George	1	0
Haven't Opened in 90 Days		Allison George	24,571	0
Sim Users who Booked More than 10		Allison George	14	0
January Birthdays		Allison George	269	0
Defector 30 Day for Sims		Nathan Morris	599	0
Next Sim Booking After Today		Nathan Morris	2	0
Loyalty Points Greater Than 0		Nathan Morris	3,039	0
Default Customer List	Default	Nathan Morris	24,441	137

Managing Contacts and Lists

Add a List

1. Open the Subscribers & Lists folder and click Lists
2. Click the Add List button at the top of the grid and select the type Static (select SMS if you are creating a new SMS list or Dynamic to create a Dynamic List)
3. Enter a List Name
4. Add an optional description for internal reference
5. Save the list in a specific folder (defaults to the main Lists folder)
6. Check Show on subscription center if you would like subscribers to be able to change preferences for this list on the profile center page
   1. The Position is used to order lists shown on the profile center page
7. Click Save and Close
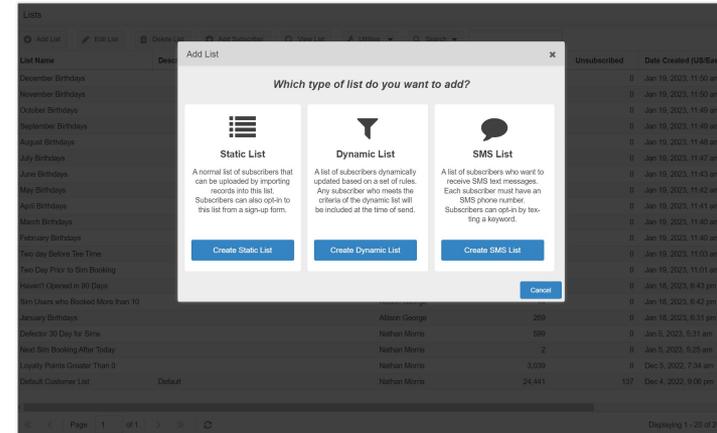
Managing Contacts and Lists

Edit List

1. Open the Subscribers & Lists folder and click Lists
2. Click the Edit List button at the top of the grid and select the type Static (select Dynamic to create a Dynamic List)
3. Go to the dropdown list and make any adjustments in the fields section, or values section
4. You can also add another Rule Group to add an additional qualifier for this list
5. Click Save and Close

Managing Contacts and Lists

Delete List

1. Open the Subscribers & Lists folder and click Lists
2. Click the Delete List button at the top of the grid
3. You'll be asked if you're sure that you want to Delete this list
4. Click Yes

Managing Contacts and Lists

Add a Subscriber to a List

Sometimes you need to add one or two subscribers to a list and don't want to have to run an import. (If you want to add a list of subscribers to an existing list, please read the wiki article Importing Your List and select the list you would like to import into.) To add a single subscriber to a specific list, please follow the steps below:

1. Open Subscribers & Lists in the left menu
2. Click Lists
3. Select the list you would like to add the subscriber to by clicking the list once
4. Click the button in the top toolbar, Add Subscriber
5. In the Subscriber window, enter the subscriber's information (email address)
6. Scroll to the bottom and click Add
7. The subscriber is now subscribed to the list

Managing Contacts and Lists

Add a Subscriber to One or Multiple Lists

Please follow these steps to manually edit subscriber subscription preferences:

1. Open Subscribers & Lists in the left menu
2. Click All Subscribers
3. Search for the subscriber's email address in the search bar
4. Edit the subscriber by clicking the email address twice or by selecting the subscriber and clicking Edit Subscriber
5. Open the second tab, Available Lists
6. Find the lists you would like to add the subscriber to and check the check box next to the list
   1. Note: To take the subscriber off of a list, uncheck the checkbox next to that list
7. Scroll to the bottom and click Update
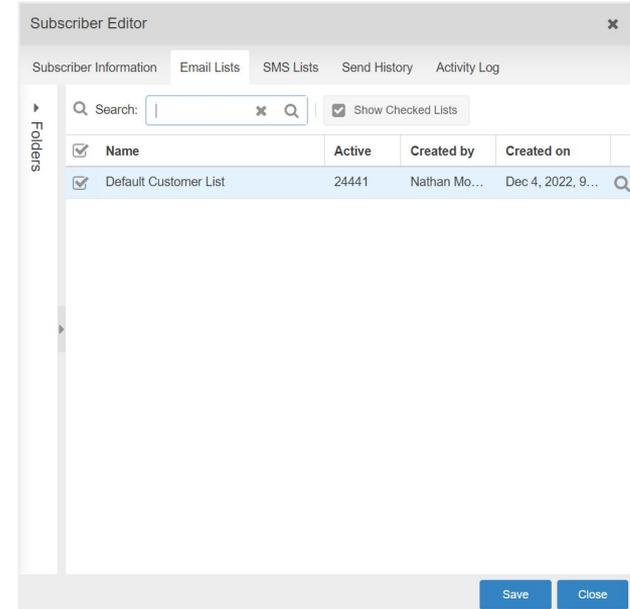
Managing Contacts and Lists

Create a List

Creating lists will help you organize subscribers for quick and easy email sends. A subscriber list is a group of subscribers that are associated with the list, such as a Current Customer List and a Prospective Customer List. A subscriber can be on one or many lists simultaneously.

To create a list, you can add a normal list, import into a list, or add a dynamic list.
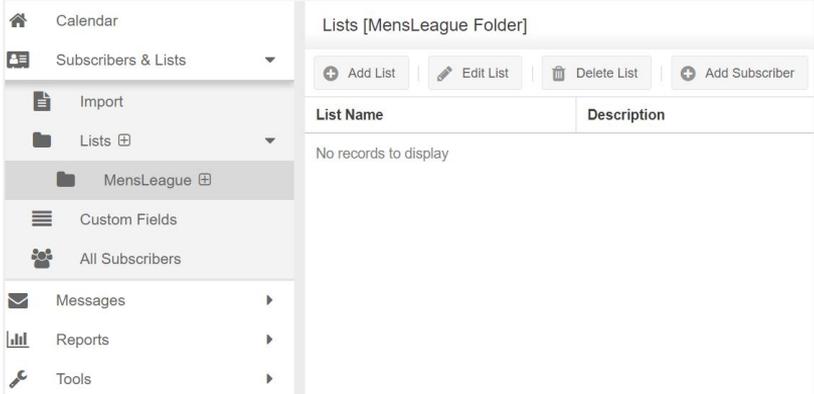
Managing Contacts and Lists

Import into a List

You can create a new list and import into it by opening the Subscribers & Lists folder and clicking Import. Click Import into a New List. Then name it and import into this new list.

For more information, read the Wiki article called Importing a List.

Managing Contacts and Lists

Create Custom Fields

A custom field allows you to collect and/or store information about a subscriber that can later be used to create dynamic lists or to merge information into the body of your email message, or subject line.

To add a custom field:

1. Open the Subscribers & Lists folder

2. Click Custom Fields, then click the Add Custom Field button

3. Type in the name of the field

4. Optionally, you can add a default value. Example: "Dear Customer". If no default value is needed, just leave this field blank
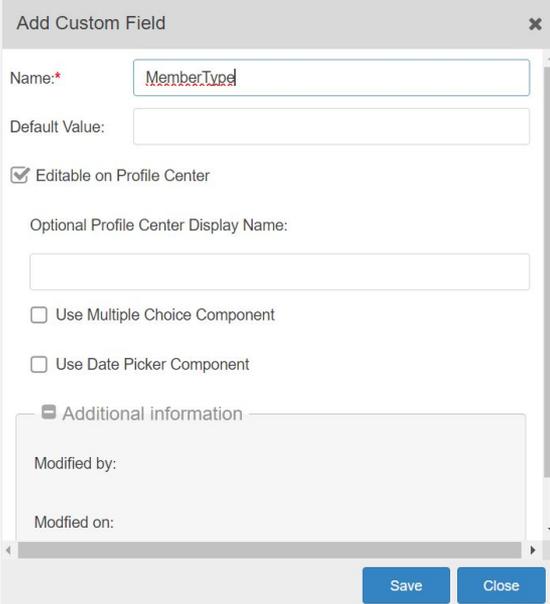
Managing Contacts and Lists

Edit a Custom Field

1. Open the Subscribers & Lists folder
2. Click Custom Fields, then click the Edit Custom Field button
3. Update the custom field information and then click Save
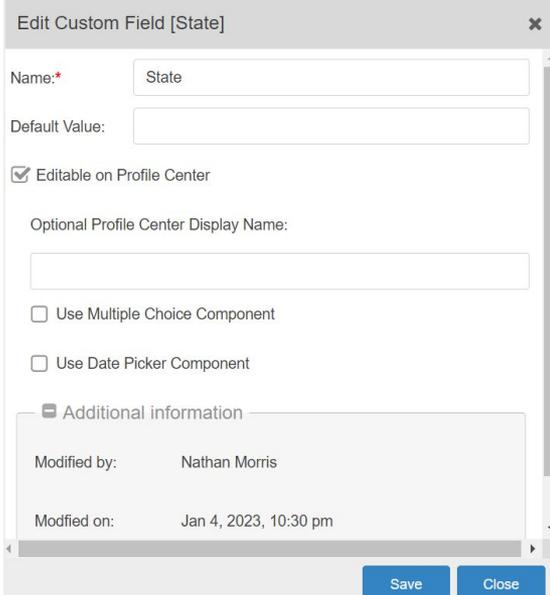
Managing Contacts and Lists

Edit a Subscriber

How Does an an Admin Manually Edit Subscriber Information?

An administrator can manually edit a subscriber's information, including custom fields and subscription preferences.

1. Open the Subscribers & Lists folder
2. Click All Subscribers
3. Search for the subscriber in the Search window by entering any part of their email address, first name, or last name
4. Once the subscriber has been located, select the record and double-click it to access its detailed subscriber record

Managing Contacts and Lists

Edit a Subscriber

How Does an an Admin Manually Edit Subscriber Information?

1. Expand the Custom fields section by clicking the arrow and then edit the fields as needed
2. To manually unsubscribe this subscriber from all future messages, check the box "Unsubscribe from All"
3. To change what lists the subscriber is on: under the Available Lists tab, check the list(s) to which the subscriber wishes to be re-subscribed
4. Click Update to save the changes
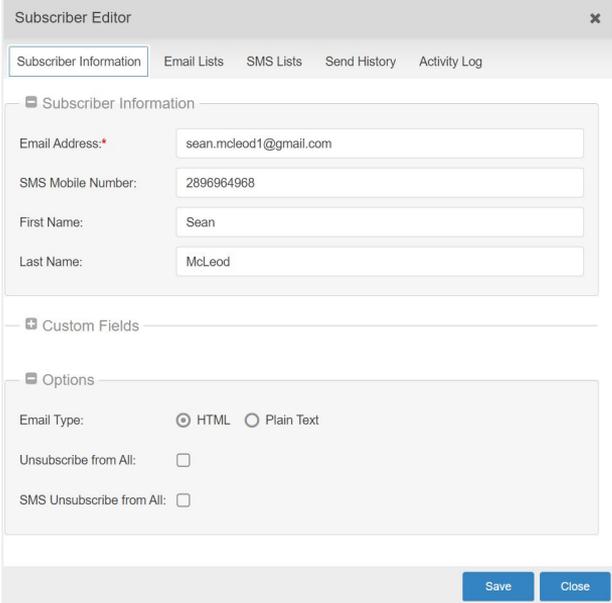
Managing Contacts and Lists

How Does an an Admin Manually Resubscribe Someone?

An administrator can manually add a subscriber back to the list(s) from which the subscriber had unsubscribed.

1. Open the Subscribers & Lists folder
2. Click All Subscribers
3. Search for the subscriber in the Search window by entering any part of their email address, or name
4. Once the subscriber has been located, select the record and double-click it to access its detailed record
5. In the first tab, make sure that the option is NOT checked to Unsubscribe from All
6. Under the Available Lists tab, check the list(s) to which the subscriber wishes to be re-subscribed
7. Click Update