



# 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.

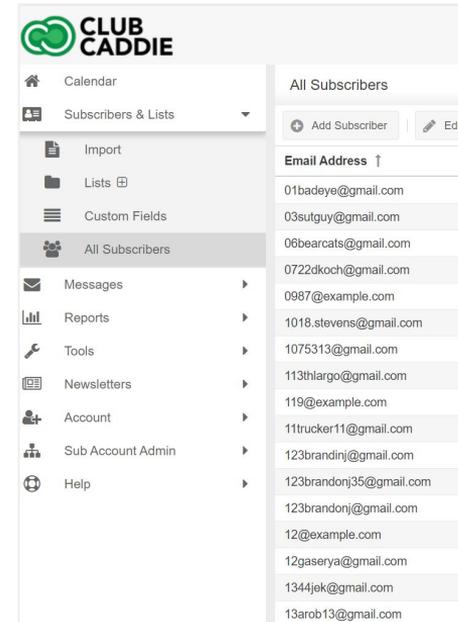


# Managing Contacts and Lists

## 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.

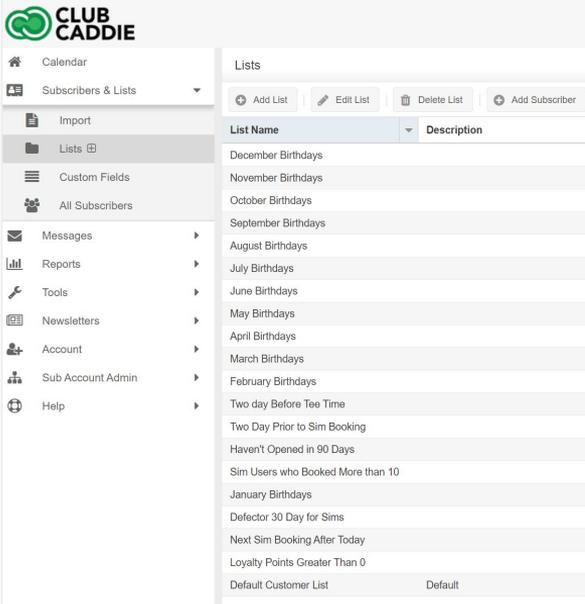


# Managing Contacts and Lists

## Sync Lists

When sending emails from an 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 to create the list once in the emailing platform and saving time.



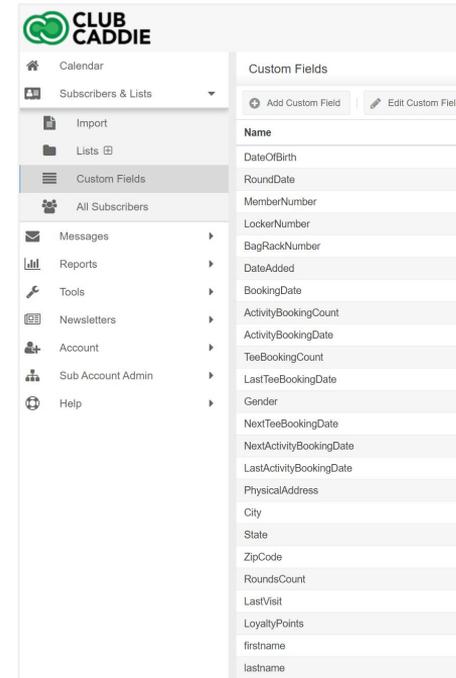
List Name	Description
December Birthdays	
November Birthdays	
October Birthdays	
September Birthdays	
August Birthdays	
July Birthdays	
June Birthdays	
May Birthdays	
April Birthdays	
March Birthdays	
February Birthdays	
Two day Before Tee Time	
Two Day Prior to Sim Booking	
Haven't Opened in 90 Days	
Sim Users who Booked More than 10	
January Birthdays	
Defector 30 Day for Sims	
Next Sim Booking After Today	
Loyalty Points Greater Than 0	
Default Customer List	Default

# 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.

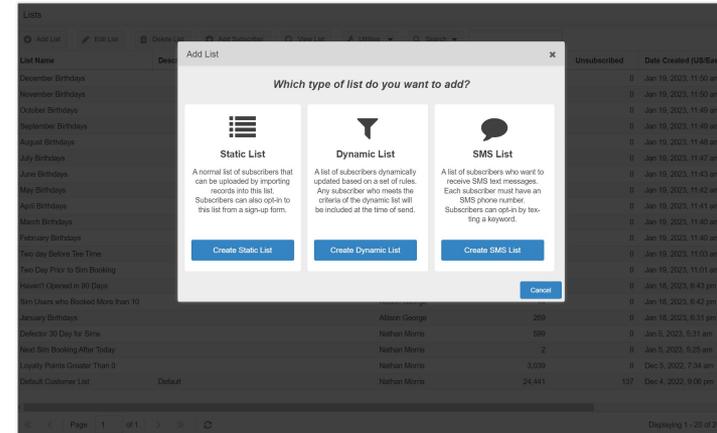
Great examples of lists often seen at golf courses, could include, but not limited to: Monthly Birthday Lists, League Player Lists, Membership Types Lists, Social Outing Lists, Activities User Lists, etc.

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

Dynamic List Rules

List Name: Defector 30 Day for Sims List Folder: /Lists

Select the static lists you want to use as a basis for your dynamic list \*

Name	Active	Created by	Created on
<input type="checkbox"/> ALL SUBSCRIBERS	ALL	Account	Mar 2, 2023, 3...
<input checked="" type="checkbox"/> Default Customer List	24441	Nathan Mo...	Dec 4, 2022, 9...

LastActivityBookingDate greater than "Today + 30"

Operators

- is equal to
- is not equal to
- less than
- greater than
- contains
- begins with
- ends with
- does not contain

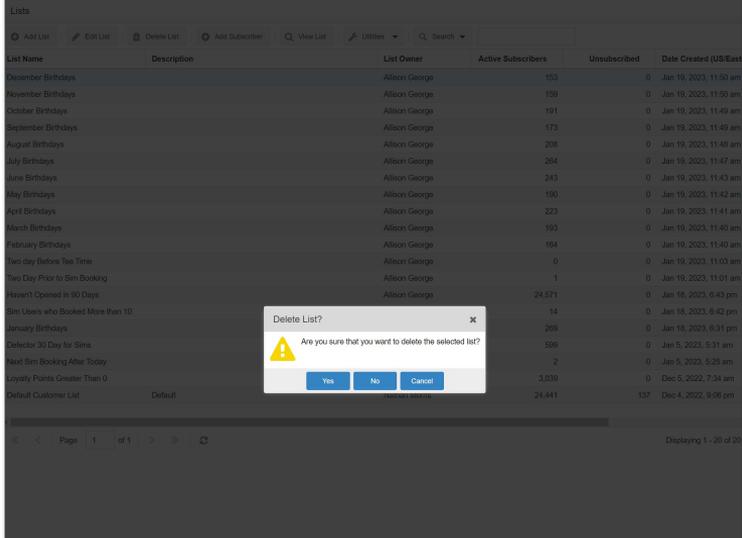
Group of Values

Rule Group Save Rules Save & Show List Create Static List

# 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



The screenshot shows the 'Lists' management interface. At the top, there are navigation buttons: 'Add List', 'Edit List', 'Delete List', 'Add Subscriber', 'View List', and 'Unlink'. Below these is a search bar. The main area contains a table with columns: 'List Name', 'Description', 'List Owner', 'Active Subscribers', 'Unsubscribed', and 'Date Created (US-EST)'. A modal dialog box is open in the center, titled 'Delete List?' with a close button (X). The dialog contains a warning icon and the text 'Are you sure that you want to delete the selected list?'. At the bottom of the dialog are three buttons: 'Yes', 'No', and 'Cancel'. The table below the dialog shows various lists such as 'December Birthdays', 'November Birthdays', etc., with their respective subscriber counts and creation dates.

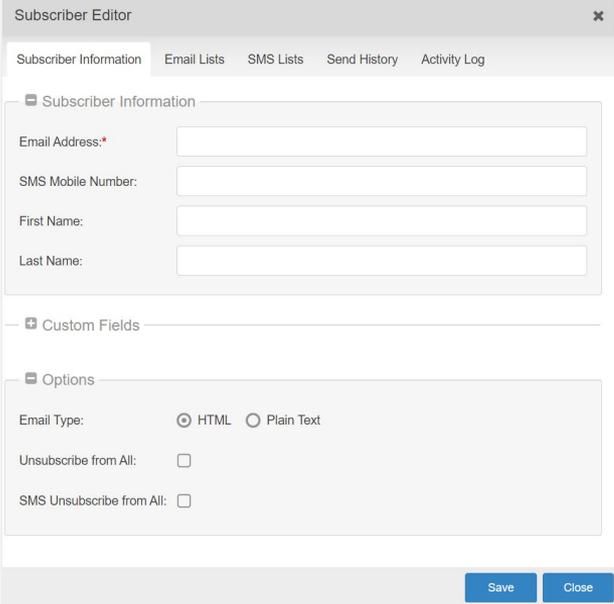
List Name	Description	List Owner	Active Subscribers	Unsubscribed	Date Created (US-EST)
December Birthdays		Allison George	153	0	Jan 19, 2023, 11:50 am
November Birthdays		Allison George	159	0	Jan 19, 2023, 11:50 am
October Birthdays		Allison George	191	0	Jan 19, 2023, 11:49 am
September Birthdays		Allison George	173	0	Jan 19, 2023, 11:49 am
August Birthdays		Allison George	208	0	Jan 19, 2023, 11:48 am
July Birthdays		Allison George	264	0	Jan 19, 2023, 11:47 am
June Birthdays		Allison George	243	0	Jan 19, 2023, 11:43 am
May Birthdays		Allison George	190	0	Jan 19, 2023, 11:42 am
April Birthdays		Allison George	223	0	Jan 19, 2023, 11:41 am
March Birthdays		Allison George	195	0	Jan 19, 2023, 11:40 am
February Birthdays		Allison George	164	0	Jan 19, 2023, 11:40 am
Ten Day Before Tee Time		Allison George	0	0	Jan 19, 2023, 11:03 am
Ten Day Prior to Tee Booking		Allison George	1	0	Jan 19, 2023, 11:01 am
Hasn't Opened in 90 Days		Allison George	24,571	0	Jan 19, 2023, 9:43 pm
Sim Users who Booked More than 10			14	0	Jan 19, 2023, 9:42 pm
January Birthdays			269	0	Jan 19, 2023, 9:31 pm
Delete 30 Day by Sim			599	0	Jan 5, 2023, 5:01 am
New Tee Booking After Today			2	0	Jan 5, 2023, 5:25 am
Loyalty Points Greater Than 0			3,839	0	Dec 5, 2022, 7:34 am
Default Customer List	Default		26,441	137	Dec 4, 2022, 9:08 pm

# 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



The screenshot shows a 'Subscriber Editor' window with a close button (X) in the top right corner. The window has a tabbed interface with the following tabs: 'Subscriber Information', 'Email Lists', 'SMS Lists', 'Send History', and 'Activity Log'. The 'Subscriber Information' tab is active and contains the following fields:

- Subscriber Information** (collapsible header)
- Email Address: \* (text input field)
- SMS Mobile Number: (text input field)
- First Name: (text input field)
- Last Name: (text input field)
- Custom Fields** (collapsible header)
- Options** (collapsible header)
- Email Type: (radio buttons for HTML and Plain Text)
- Unsubscribe from All: (checkbox)
- SMS Unsubscribe from All: (checkbox)

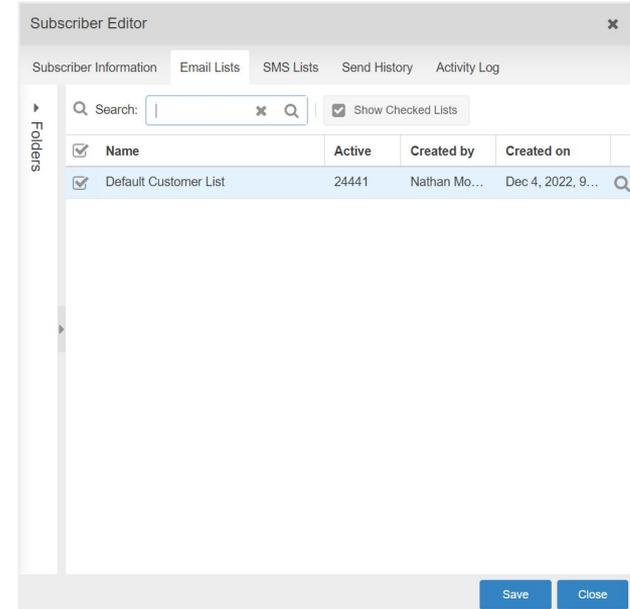
At the bottom right of the window, there are two buttons: 'Save' and 'Close'.

# 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

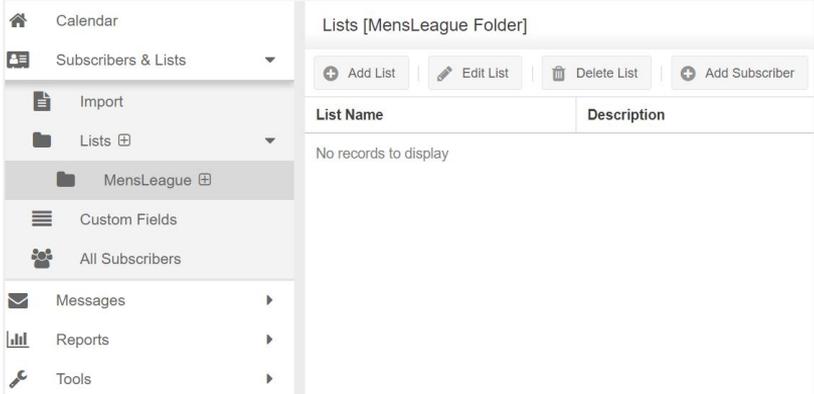


# Managing Contacts and Lists

## 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.



List Name	Description
No records to display	

# 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](#).

Import List: Step 2 of 3

New List Name:*	<input type="text" value="MastersTournament"/>
List Folder:	<input type="text" value="/Lists"/>
Import File Delimiter:	<input type="text" value="CSV (Comma delimited) (*.csv)"/>
Subscriber Conflicts:	<input type="text" value="Add new subscribers and update existing subscribers"/>

How would you like to upload your list?

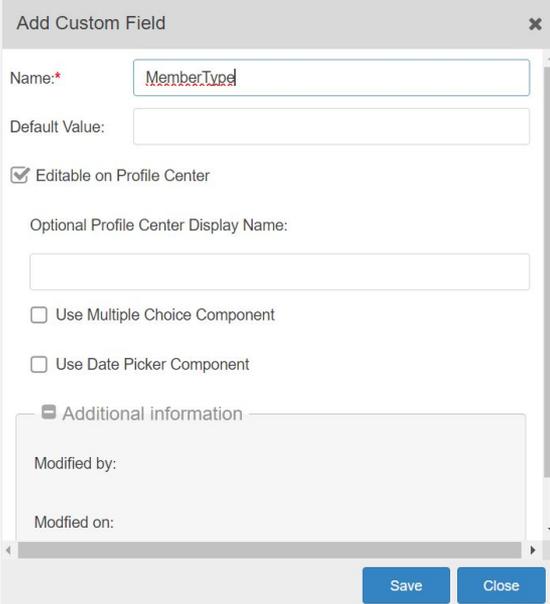
# Managing Contacts and Lists

## 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



The screenshot shows a dialog box titled "Add Custom Field" with a close button (X) in the top right corner. The form contains the following fields and options:

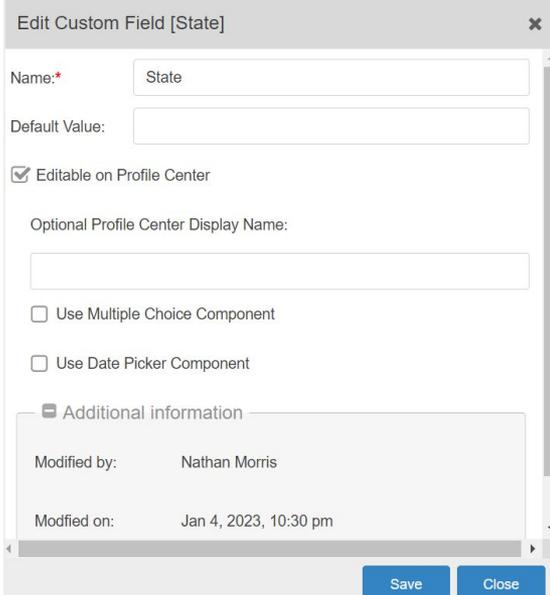
- Name:** A text input field containing "MemberType".
- Default Value:** An empty text input field.
- Editable on Profile Center**
- Optional Profile Center Display Name:** An empty text input field.
- Use Multiple Choice Component**
- Use Date Picker Component**
- Additional information** (expanded):
  - Modified by:** An empty text input field.
  - Modified on:** An empty text input field.

At the bottom right of the dialog are two blue buttons: "Save" and "Close".

# 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



Edit Custom Field [State] ×

Name:\*

Default Value:

Editable on Profile Center

Optional Profile Center Display Name:

Use Multiple Choice Component

Use Date Picker Component

**Additional information**

Modified by: Nathan Morris

Modified on: Jan 4, 2023, 10:30 pm

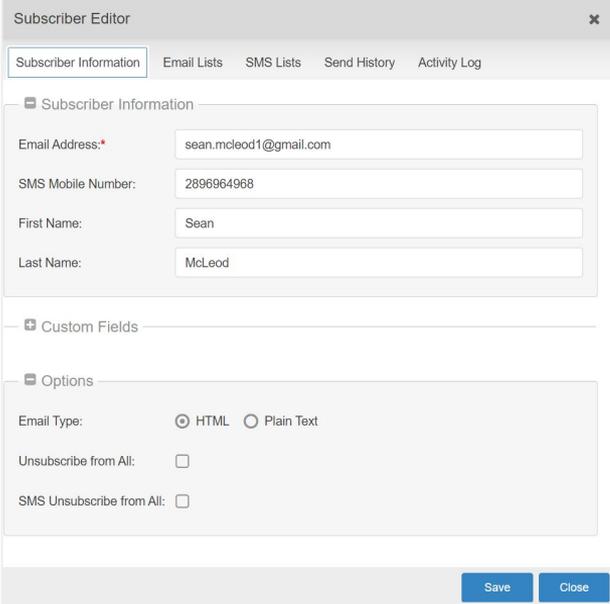
# Managing Contacts and Lists

## Edit a Subscriber

How Does 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



The screenshot shows a web application window titled "Subscriber Editor" with a close button (X) in the top right corner. Below the title bar is a navigation menu with tabs: "Subscriber Information" (selected), "Email Lists", "SMS Lists", "Send History", and "Activity Log". The main content area is divided into three sections:

- Subscriber Information:** Contains four input fields: "Email Address:" with the value "sean.mcleod1@gmail.com", "SMS Mobile Number:" with the value "2896964968", "First Name:" with the value "Sean", and "Last Name:" with the value "McLeod".
- Custom Fields:** This section is currently empty.
- Options:** Contains three items: "Email Type:" with radio buttons for "HTML" (selected) and "Plain Text"; "Unsubscribe from All:" with an unchecked checkbox; and "SMS Unsubscribe from All:" with an unchecked checkbox.

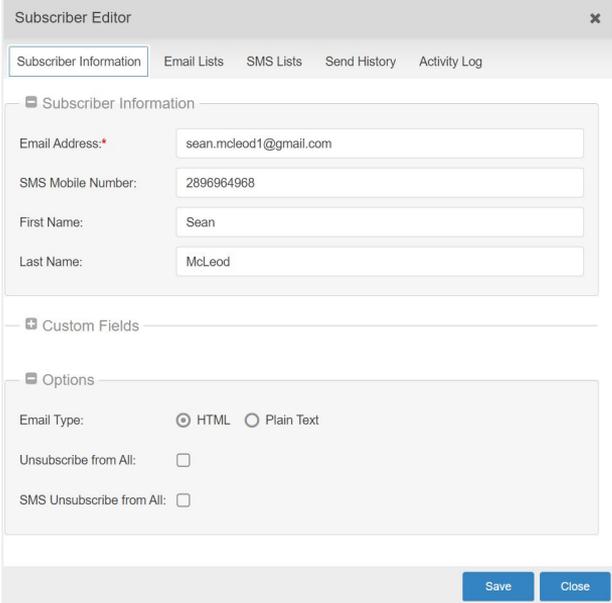
At the bottom right of the window are two buttons: "Save" and "Close".

# Managing Contacts and Lists

## Edit a Subscriber

How Does 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



The screenshot shows the 'Subscriber Editor' window with the following details:

- Subscriber Information** (selected tab):
  - Email Address: sean.mcleod1@gmail.com
  - SMS Mobile Number: 2896964968
  - First Name: Sean
  - Last Name: McLeod
- Custom Fields** (collapsed)
- Options**:
  - Email Type:  HTML  Plain Text
  - Unsubscribe from All:
  - SMS Unsubscribe from All:

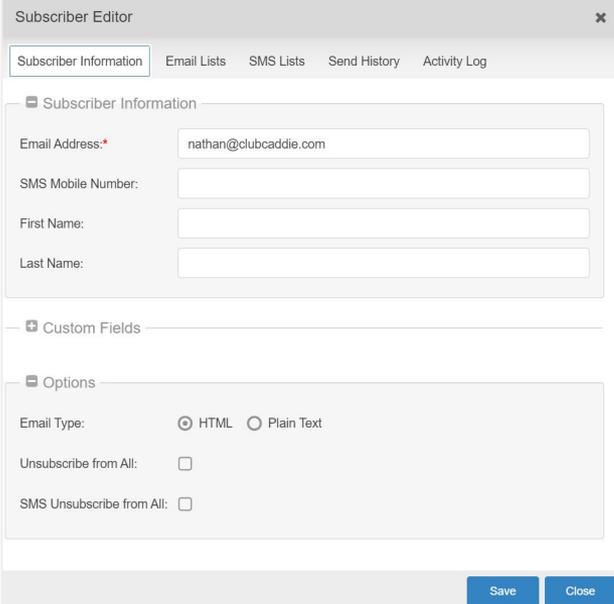
Buttons: Save, Close

# Managing Contacts and Lists

## How Does 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



The screenshot shows the 'Subscriber Editor' window with the following details:

- Subscriber Information** (selected tab):
  - Email Address: nathan@clubcaddie.com
  - SMS Mobile Number: [Empty field]
  - First Name: [Empty field]
  - Last Name: [Empty field]
- Custom Fields** (collapsed)
- Options**:
  - Email Type:  HTML  Plain Text
  - Unsubscribe from All:
  - SMS Unsubscribe from All:

Buttons: Save, Close