



# CLUB CADDIE

a *Jonas* Software Company

Email Marketing Automation Training

Automated Messages

# Email Marketing Automation Training

## Courses

1. Advanced Automation
2. Content Blocks + Dynamic Content
3. Edit Footers
- 4. Automated Messages**
5. Survey Creator
6. Site Visitor Signup Box
7. Template Editor

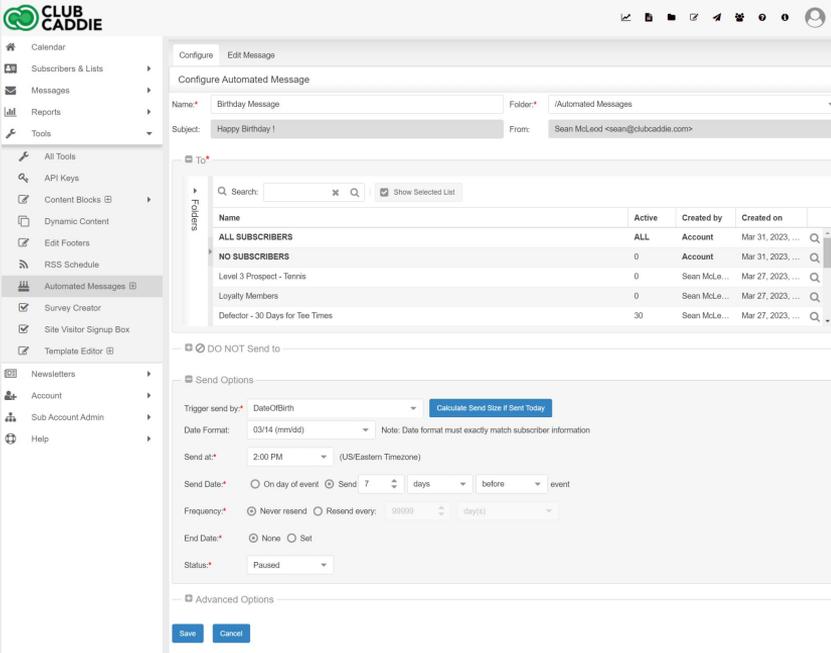
# Automated Messages



# Automated Messages

An automated message is a single message that will be automatically sent to subscribers when the conditions of the automation are met. The automated message can be sent to subscribers:

1. **On a specific date**: sent on a saved date, such as the subscriber's birthday
  - a. Need to save the date as a custom field value for the subscribers in a consistent **date format**
  
2. **Subscribers on a specific list**: sent to every subscriber on a list, sent once per specified period of time
  - a. For example, if you create a dynamic list that includes all subscribers who have a Status = "Prospect," they could be sent a reminder email to complete registration once a month until the custom field "Status" changes to "Registered."
  
  - b. It's a good idea to save the dynamic list in a specific List folder for automated messages. After creating an automated message based on a dynamic list, be very careful when editing the list. Any subscribers added when the list is saved will immediately be sent the automated message.



**CLUB CADDIE**

Configure Edit Message

Configure Automated Message

Name:\* Birthday Message Folder:\* /Automated Messages

Subject: Happy Birthday! From: Sean McLeod <sean@clubcaddie.com>

To:

Q Search: X Q Show Selected List

Name	Active	Created by	Created on
ALL SUBSCRIBERS	ALL	Account	Mar 31, 2023, ...
NO SUBSCRIBERS	0	Account	Mar 31, 2023, ...
Level 3 Prospect - Tennis	0	Sean McLe...	Mar 27, 2023, ...
Loyalty Members	0	Sean McLe...	Mar 27, 2023, ...
Defector - 30 Days for Tee Times	30	Sean McLe...	Mar 27, 2023, ...

DO NOT Send to

Send Options

Trigger send by:\* DateOfBirth Calculate Send Size if Sent Today

Date Format: 03/14 (mm/dd) Note: Date format must exactly match subscriber information

Send at:\* 2:00 PM (US/Eastern Timezone)

Send Date:\*  On day of event  Send 7 days before event

Frequency:\*  Never resend  Resend every: 90000 day(s)

End Date:\*  None  Set

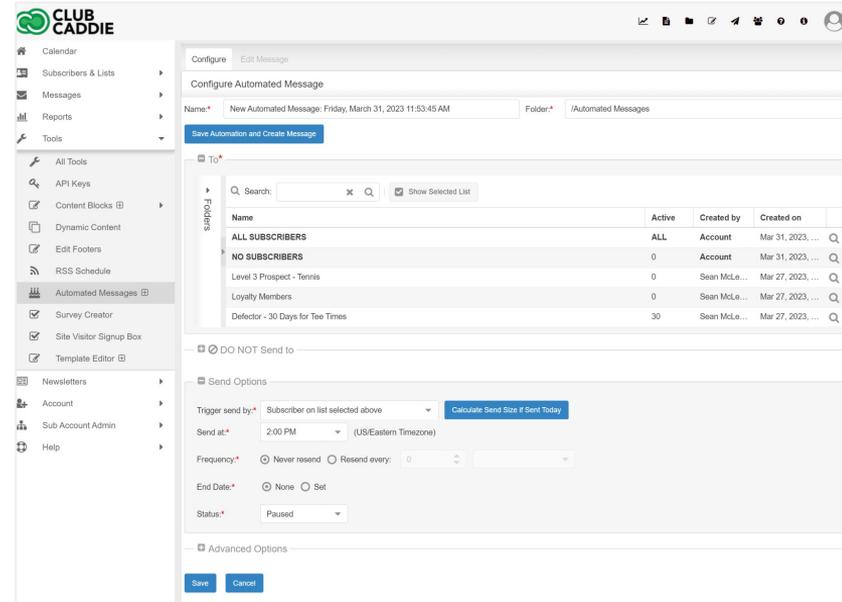
Status:\* Paused

Advanced Options

Save Cancel

# Set-Up an Automated Message

1. Open the **Tools** folder in the left menu
2. Click on **Automated Messages**
3. Click **Create**
4. Type in a **Name** for the automation
5. Select a list to which the message will be sent
  - a. Select **No Subscribers** if you don't know which list you'll select in the future, and do not want to accidentally send to anyone while configuring and testing



**Configure Automated Message**

Name: New Automated Message: Friday, March 31, 2023 11:53:45 AM Folder: /Automated Messages

[Save Automation and Create Message](#)

**To**

Name	Active	Created by	Created on
ALL SUBSCRIBERS	ALL	Account	Mar 31, 2023, ...
NO SUBSCRIBERS	0	Account	Mar 31, 2023, ...
Level 3 Prospect - Tennis	0	Sean McL...	Mar 27, 2023, ...
Loyalty Members	0	Sean McL...	Mar 27, 2023, ...
Defector - 30 Days for Tee Times	30	Sean McL...	Mar 27, 2023, ...

DO NOT Send to

**Send Options**

Trigger send by: Subscriber on list selected above [Calculate Send Size if Sent Today](#)

Send at: 2:00 PM (US Eastern Timezone)

Frequency:  Never resend  Resend every: 0

End Date:  None  Set

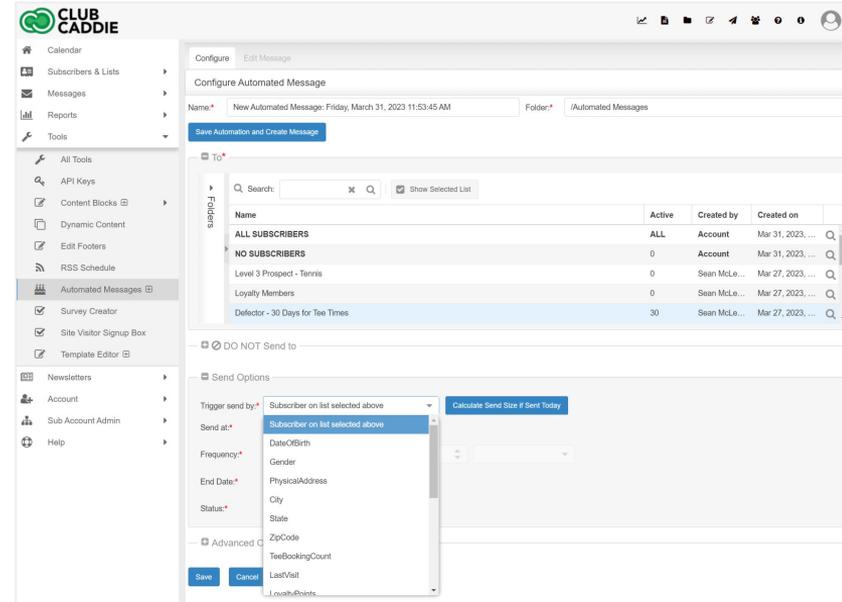
Status: Paused

**Advanced Options**

[Save](#) [Cancel](#)

# Set-Up an Automated Message

6. Choose whether to trigger the message by:
  - a. A **custom field** that's a date (ex: birthday)
    - i. If a date **custom field** is chosen, select a date format for the field (mm-dd-yyyy)
    - ii. The **date format** must be in the same exact format as the selected format
    - iii. If a subscriber's date custom field is in a different format from the selected format, the date will be ignored
    - iv. The frequency of this automated message will be limited by the send option to send the message only once (upcoming conference date) or every day (ex: check everyday to see if it's someone's birthday)
  - b. Subscriber is on a **list** selected above on this screen (ex: on a prospect list)
    - i. You can select a previously created **dynamic list**
    - ii. The sending frequency of this automated message will be limited by the selected option: to send the message only once (upcoming conference date) or every year (ex: birthday)



# Set-Up an Automated Message

7. Now you have to configure when to send the automated message to the subscribers
- Send at:** the time of day to send the message
  - Send Date:** on the day of the event (selected date custom field)
  - Frequency:** send the message only once (upcoming conference date) or every year (ex: birthday)

**Note:** By default, the Automated Message tool will only send to a subscriber a single time. If you would like to enable the use of the **Frequency** option, a member of the Critical Impact staff will be able to enable **Duplicate Sending**, which will allow the same message to be sent to the same subscriber multiple times.

- End Date:** optional to set a date to stop the automation

**Send Options**

Trigger send by:\* LastVisit Calculate Send Size If Sent Today

Date Format: 03/14 (mm/dd) Note: Date format must exactly match subscriber information

Send at:\* 2:30 PM (US/Eastern Timezone)

Send Date:\*  On day of event  Send 1 days before event

Frequency:\*  Never resend  Resend every: 1 week(s)

End Date:\*  None  Set

Status:\* Paused

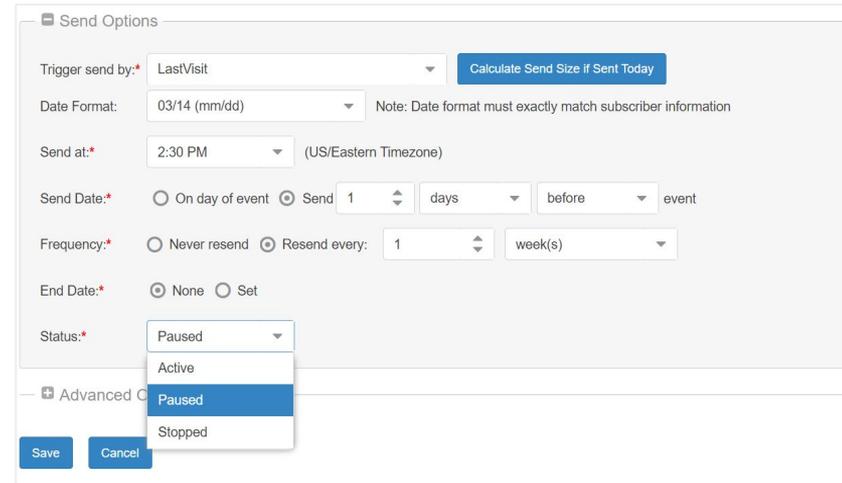
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**Advanced Options**

Save Cancel

# Set-Up an Automated Message

- Status:** Keep Paused until absolutely ready to start sending the message to subscribers
- Save the message by clicking the **Save** button or the **Save Automation** and **Create Message** button
- Once the Automated Message configuration is saved, you'll need to create a message in the **Edit Message** tab



The screenshot shows the 'Send Options' configuration form. The 'Trigger send by' is set to 'LastVisit'. The 'Date Format' is '03/14 (mm/dd)'. The 'Send at' is '2:30 PM (US/Eastern Timezone)'. The 'Send Date' is set to 'Send 1 days before event'. The 'Frequency' is 'Resend every: 1 week(s)'. The 'End Date' is 'None'. The 'Status' dropdown menu is open, showing 'Paused', 'Active', and 'Stopped' options. The 'Paused' option is highlighted. There are 'Save' and 'Cancel' buttons at the bottom left.

Send Options

Trigger send by:\* LastVisit Calculate Send Size if Sent Today

Date Format: 03/14 (mm/dd) Note: Date format must exactly match subscriber information

Send at:\* 2:30 PM (US/Eastern Timezone)

Send Date:\*  On day of event  Send 1 days before event

Frequency:\*  Never resend  Resend every: 1 week(s)

End Date:\*  None  Set

Status:\*  
Paused  
Active  
Paused  
Stopped

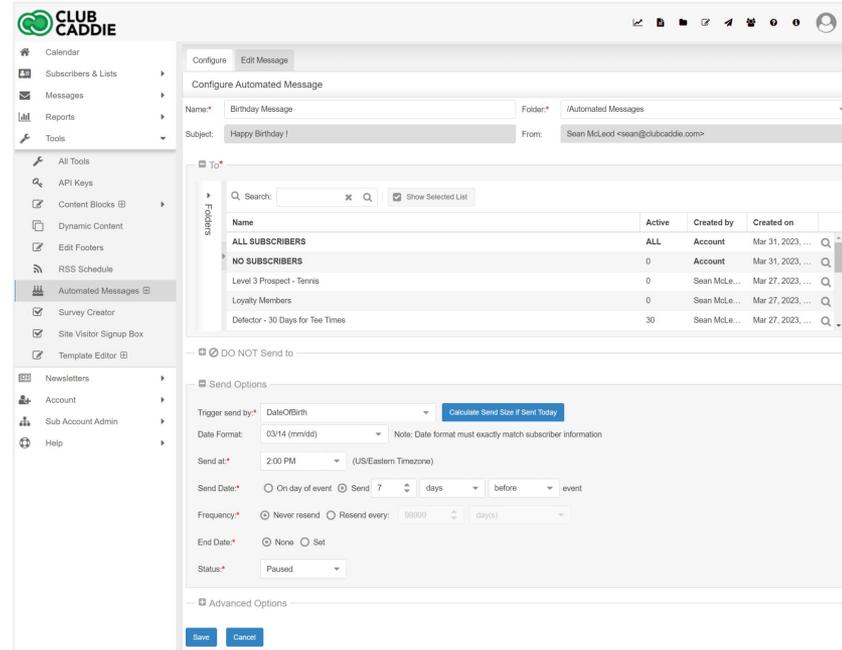
Save Cancel

# Set-Up an Automated Message

11. In this tab, create the message you would like to send to the subscribers when all of the conditions are met from the configuration screen
- You'll only see the "Create New Message" page once when creating a message for the first time
  - This message is the only message associated with the automated message
  - You can edit the message at any time, but we strongly suggest keeping the message the same after activating the automation. See the Tracking an Automated Message notes below.

12. **Save** the message before returning to the Configure tab. Any unsaved changes will be lost

13. When you're ready to activate the automated message, select the Status: **Active**



**CLUB CADDIE**

Configure Automated Message

Name: Birthday Message Folder: /Automated Messages

Subject: Happy Birthday! From: Sean McLeod <sean@clubcaddie.com>

To:

Name	Active	Created by	Created on
ALL SUBSCRIBERS	ALL	Account	Mar 31, 2023, ...
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DO NOT Send to

Send Options

Trigger send by: DateOfBirth Calculate Send Size if Sent Today

Date Format: 03/14 (mm/dd) Note: Date format must exactly match subscriber information

Send at: 2:00 PM (USEastern Timezone)

Send Date:  On day of event  Send: 7 days before event

Frequency:  Never resend  Resend every: 00000 days

End Date:  None  Set

Status: Paused

Advanced Options

Save Cancel

# Tracking an Automated Message

The automated message tracking report will show under the report [Email Tracking](#).

Please be aware that if the message content is edited a lot (links are edited/deleted), the stats may not look quite right. If many changes need to be made to the message, we recommend stopping the first automation and creating a new message automation.

