



# Email Management

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User Guide for JustGo

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# What is Email Management?

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Email Management provides administrators the ability to edit the appearance, content and schedule of the automated system emails. Emails may differ depending on your subscription.

## FOR EXAMPLE

When a member's membership is due for renewal in one month's time, they will receive an automated renewal reminder.

# How do I access Email Management?

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If you are logged into JustGo as an administrator you will find an Email Management tile in the Menu under the Settings Area.



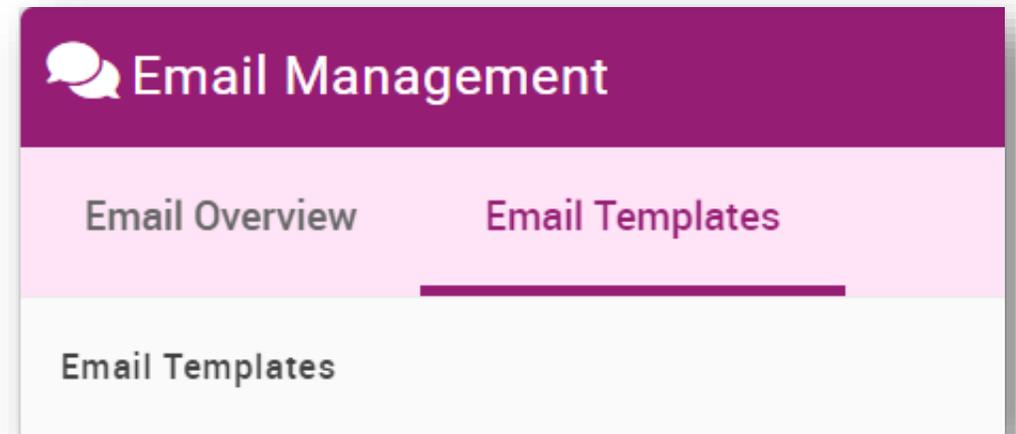
# What are Email Templates?

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Administrators are able to customise the format of the emails

The easy to use interface lets you edit the Header and Footer that wrap around the content

With the ability to store multiple templates, each type of email can have its own personality.



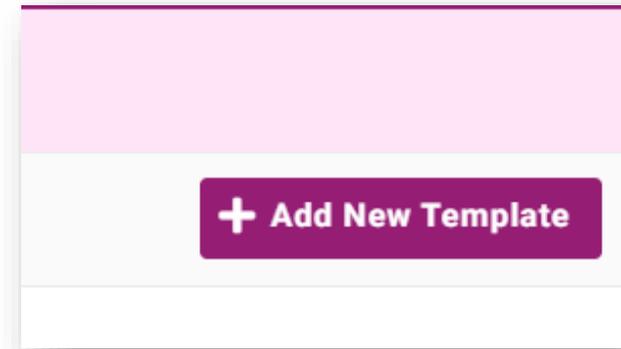
# How do I create a new template?

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Click on the Email Templates tab (as seen on the previous page)

Click Add New Template on the right hand side of the screen.



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# How do I create a new template?



**Name:** Used to identify the template and not visible to the recipient.

**Description:** A brief summary of the template, optional and not visible to the recipient.

**Organisation Name:** The name of the sender.

**Organisation Email:** Default email address of the sender. Only used when no sender email address is selected during the content editing of the email.

**JustGo URL:** Used to replace #URL in the email content.

A screenshot of a web form for creating a new template. The form has a white background and a subtle drop shadow. It contains five input fields, each with a label to its left and a small asterisk to its right. The labels are: "Name:", "Description:", "Organisation Name:", "Organisation Email:", and "JustGo URL:". The "Name:" and "Organisation Name:" labels are in a grey font, while the others are in a lighter grey font. The input fields are empty and have a thin grey border.

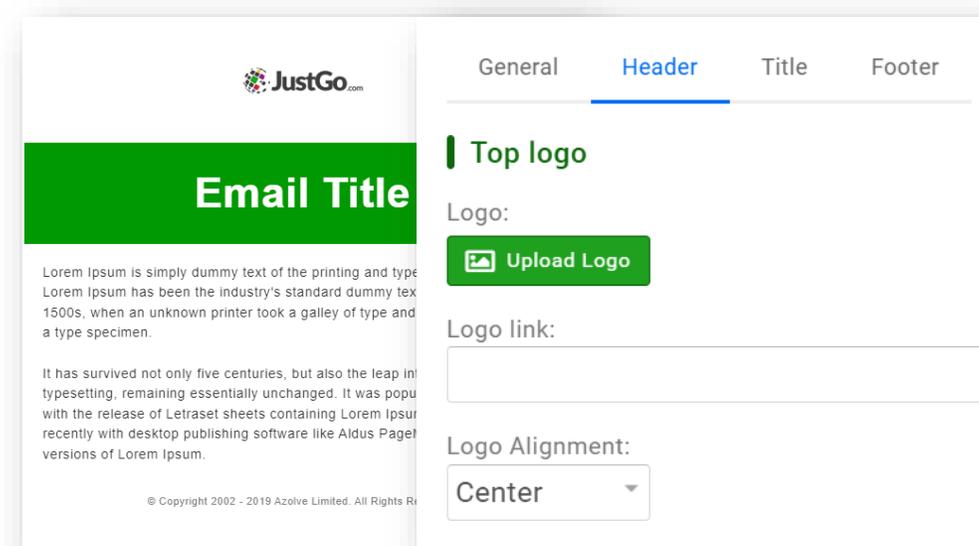
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# How do I create a new template Header?

The header tab allows you to update the logo.

You can also upload JPEGs in different ratios which may contain more information alongside your logo

You may also wish to include a hyperlink back to your website



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# How do I create a new template Title?



The Title tab lets you edit the Email **Title** area as seen in the image

The actual wording is replaced by the data entered in the Email Title field found when editing the content of each email.

A screenshot of a web-based configuration interface for an email template. At the top, there are two buttons: "Cancel" (grey) and "Save" (green). Below these are four tabs: "General", "Header", "Title" (which is selected and highlighted with a blue underline), and "Footer". Under the "Title" tab, there is a section titled "Email Title" with a green vertical bar to its left. Below this title is a checkbox labeled "Disable Email Title?". Further down, there are three input fields: "Text size:" with a dropdown menu showing "45px" and an asterisk; "Text color (hex):" with a text box containing "#ffffff", a small globe icon, and an asterisk; and "Background color (hex):" with a text box containing "#009901", a small globe icon, and an asterisk.

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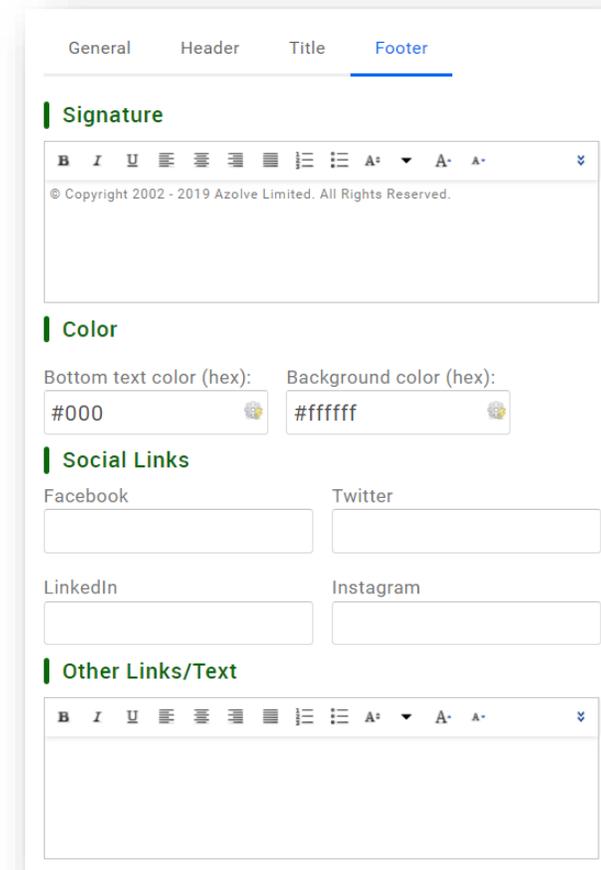
# How do I create a new template Footer?

**Signatures:** This changes the default signature of the template and can be left blank.

**Colour:** Changes the background colour of the footer

**Social Media:** Add in links to your social media channels and they will show up as icons.

**Other Links/Text:** This will show beneath the social icons and can be left blank.

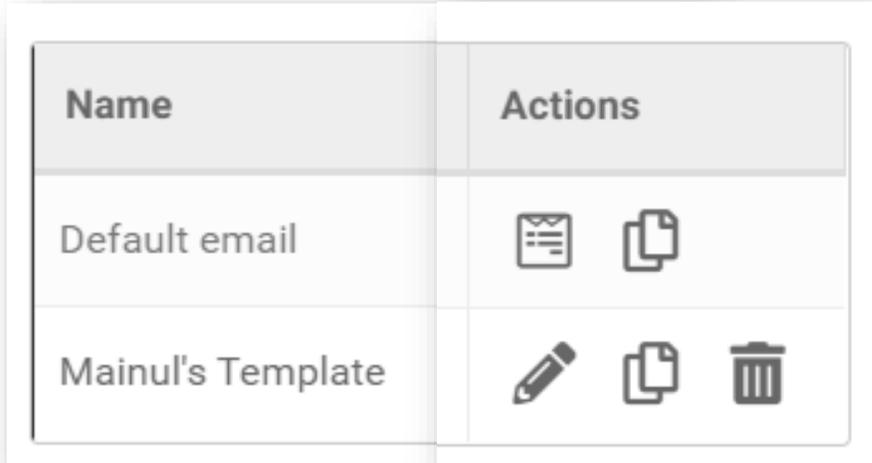


The screenshot shows the 'Footer' tab in the email template editor. It includes sections for 'Signature' (with a rich text editor containing '© Copyright 2002 - 2019 Azolve Limited. All Rights Reserved.'), 'Color' (with input fields for 'Bottom text color (hex): #000' and 'Background color (hex): #ffffff'), 'Social Links' (with input fields for Facebook, Twitter, LinkedIn, and Instagram), and 'Other Links/Text' (with another rich text editor).

# How do I edit Email template?

The Default template cannot be edited. You can however make a copy of the default in order to create your own branded template.

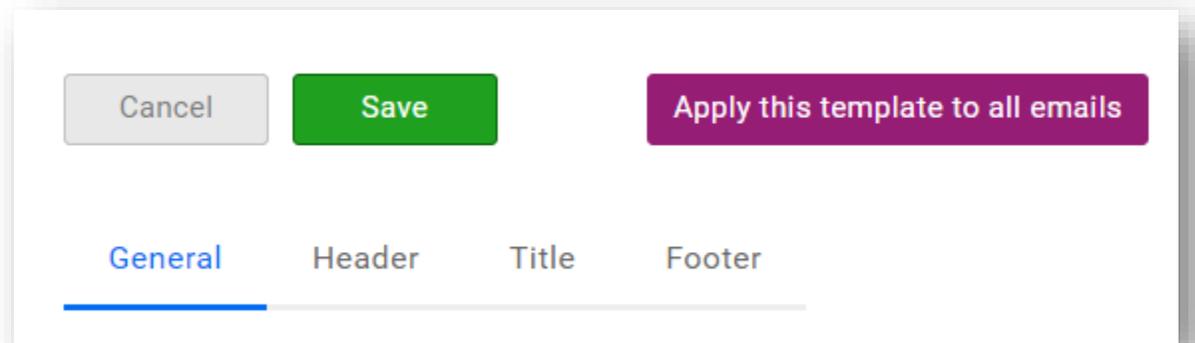
You can see from the trash icon, that Mainul's Template is a branded copy because you are able to delete it.



Name	Actions
Default email	 
Mainul's Template	  

# How do I apply edit Email template to All Automated emails?

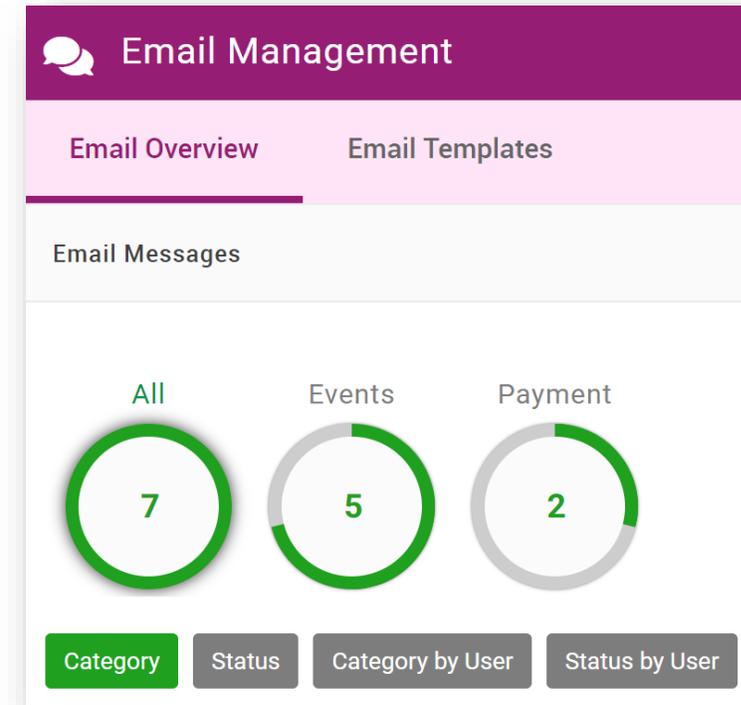
Once you have saved your new template, go to the edit mode again and there you will see a new button **Apply this template to all emails**, this will apply the ticket to all automated emails.



# What is Email Overview?

The Email Overview shows all of the automated emails that are sent from the JustGo system to the members.

On the right hand side of the screen you have an action to switch these emails on / off.

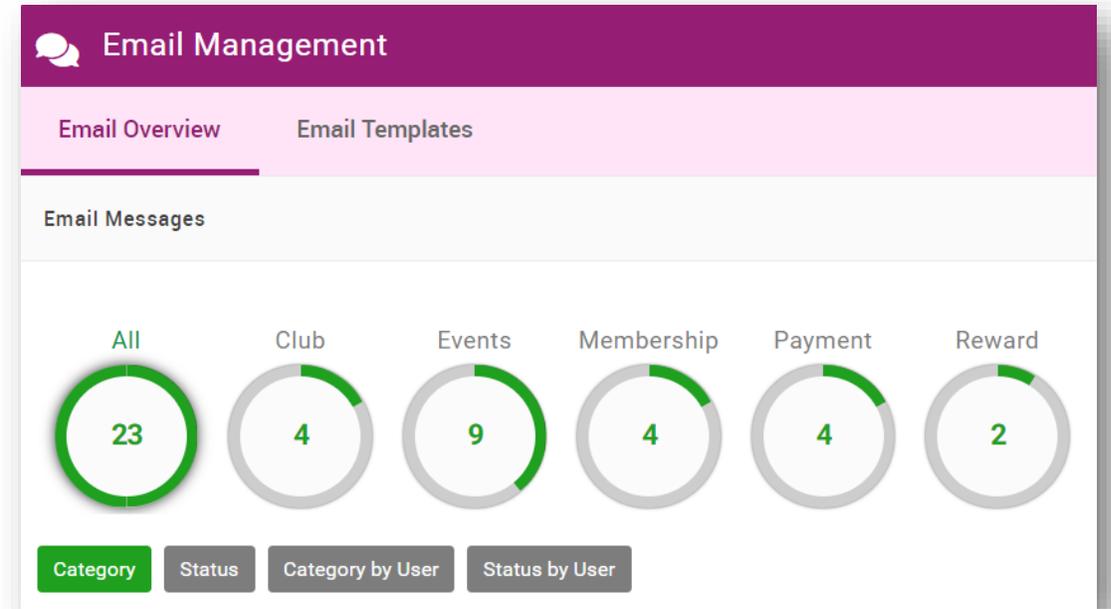


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# What is Email Overview?

Using the roundels in the Email Overview you can segment the emails into the category you wish to look at.

This section breaks the sorting method down further.



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# What is Email Overview?



The first few emails under the selected category are the system defaults. These can only be activated/deactivated, viewed and copied with the controls indicated.

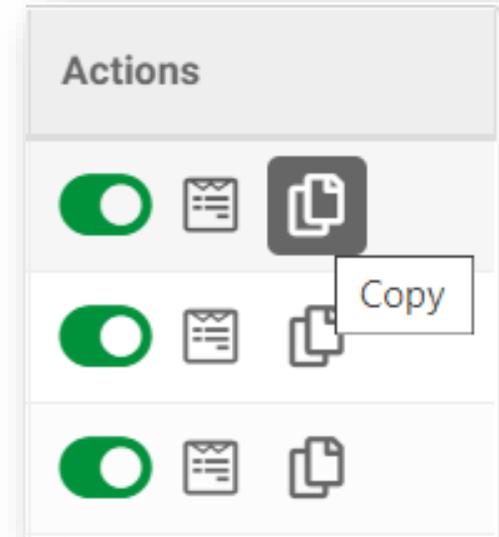
If you want your own specific wording you will need to make a copy of the default and then be sure to switch off the default and switch on your copy.

	Email Name	Options	Actions
<input checked="" type="checkbox"/>	Registration (Self)		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Registration (NGB)		<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Registration(Club)		<input checked="" type="checkbox"/>

# How do I customise an automated email?

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Simply click the copy icon on the right hand side of the screen to start creating your own customized version of that email.

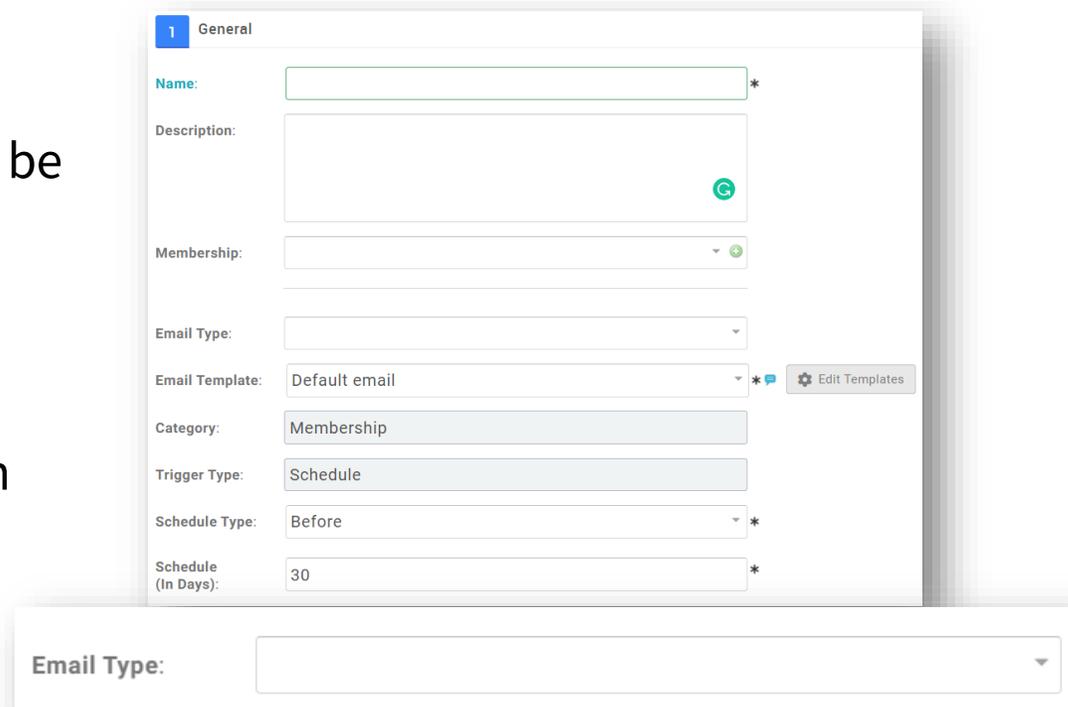


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# How do I customise an automated email?

Upon clicking the Copy button, a draft copy will be created.

**Note:** For On purchase/ Expiry Reminder emails you will have the additional option to select the Email Type. This will allow you to specify if the notification will be sent product purchased with Subscription/Manual Renewal or for both.



The screenshot shows the 'General' settings for an automated email. The fields are as follows:

- Name:  \*
- Description:  Copy
- Membership:  +
- Email Type:
- Email Template: Default email \* Edit Templates
- Category: Membership
- Trigger Type: Schedule
- Schedule Type: Before \*
- Schedule (In Days): 30 \*

Below the main form, there is a separate 'Email Type:' dropdown menu.

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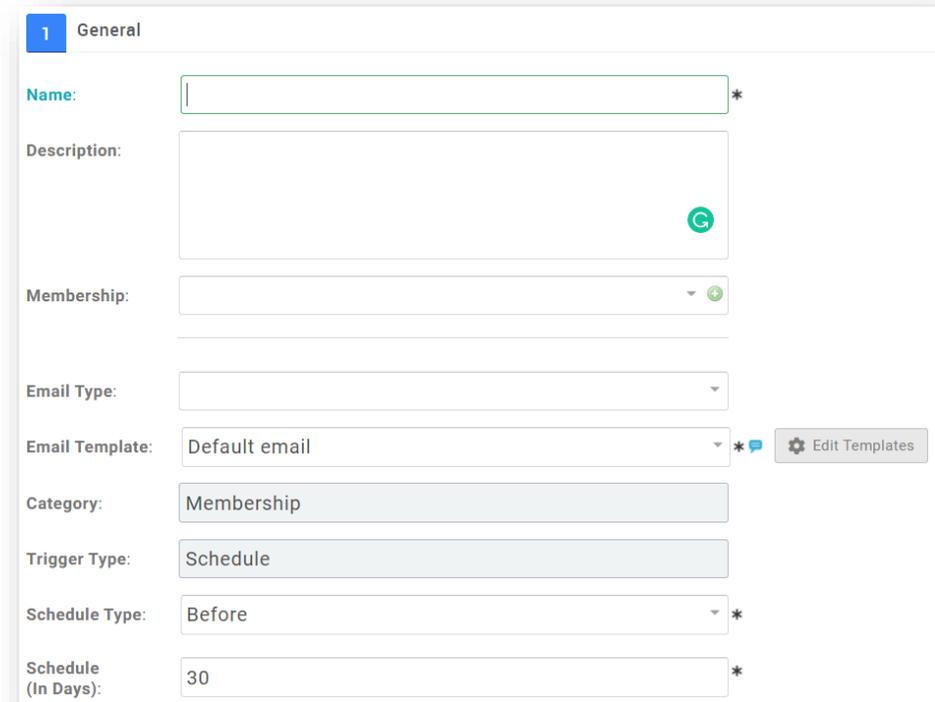
# How do I customise an automated email?

**Name:** This is used to identify the automated email and is not visible to the recipient.

**Description:** A brief summary of the Automated Email for further clarification. This field is optional.

**Email Template:** Select your personalised template you created in the Email Templates section.

**Category:** This field will be filled automatically according to the Email the draft was copied from.



The screenshot shows the 'General' settings page for an automated email. The fields are as follows:

- Name:** A text input field with a red asterisk indicating it is required.
- Description:** A large text area with a green 'G' icon in the bottom right corner.
- Membership:** A dropdown menu with a green plus icon.
- Email Type:** A dropdown menu.
- Email Template:** A dropdown menu with 'Default email' selected, a red asterisk, and an 'Edit Templates' button.
- Category:** A dropdown menu with 'Membership' selected.
- Trigger Type:** A dropdown menu with 'Schedule' selected.
- Schedule Type:** A dropdown menu with 'Before' selected and a red asterisk.
- Schedule (In Days):** A text input field with '30' entered and a red asterisk.

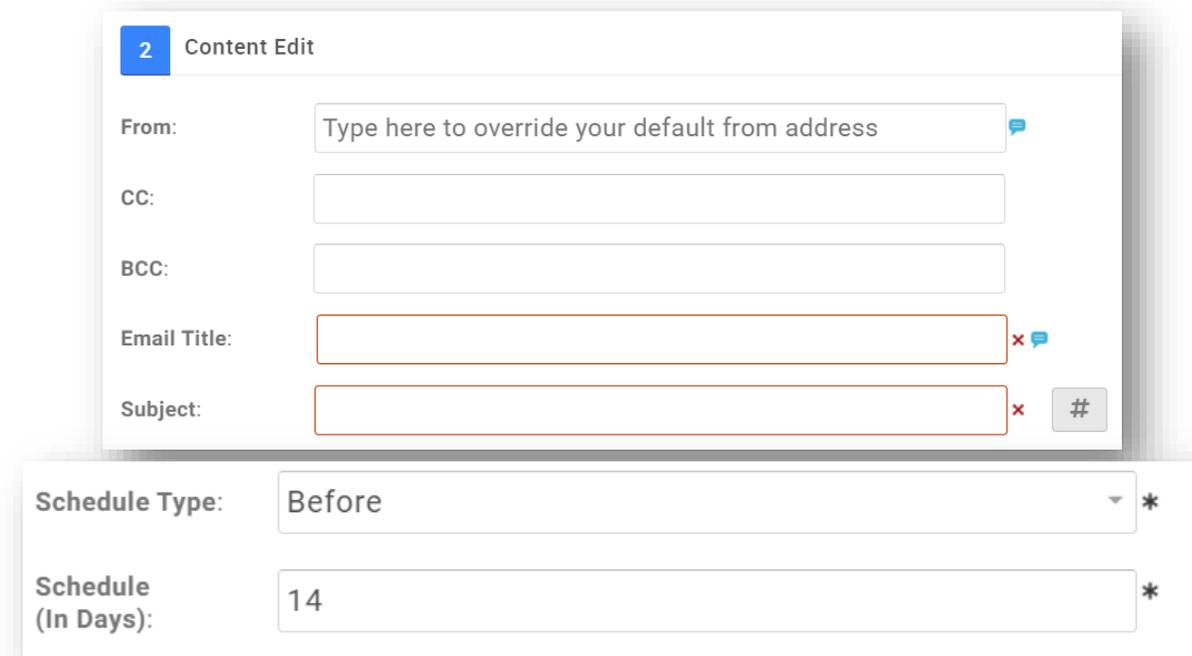
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# How do I customise an automated email?

**From:** Helps you to override default From address with a different address.

**CC & BCC:** Allows you to associate other members email address to the email.

**Note:** On reminder emails you will also have the option to specify how early or after the member should receive this reminder.



The screenshot shows a 'Content Edit' form with the following fields and options:

- From:** A text input field with the placeholder text 'Type here to override your default from address' and a blue speech bubble icon.
- CC:** An empty text input field.
- BCC:** An empty text input field.
- Email Title:** An empty text input field with a red border, a red 'x' icon, and a blue speech bubble icon.
- Subject:** An empty text input field with a red border, a red 'x' icon, and a grey '#' icon.
- Schedule Type:** A dropdown menu with 'Before' selected and a '\*' icon.
- Schedule (In Days):** A text input field with '14' entered and a '\*' icon.

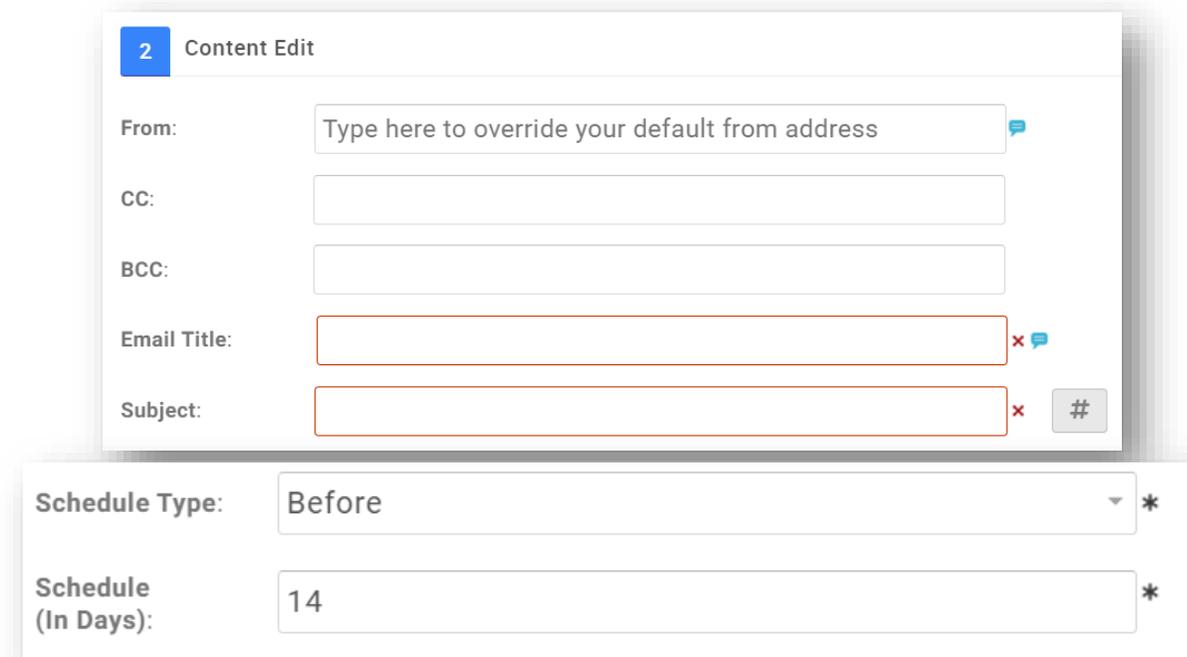
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# How do I customise an automated email?

**Email Title:** The text you enter in this field will replace the Title section of the template chosen.

**Subject:** The subject that the member will see. This field supports Merge Tags using “#”.

**Note:** On reminder emails you will also have the option to specify how early or after the member should receive this reminder.



2 Content Edit

From:

CC:

BCC:

Email Title:

Subject:

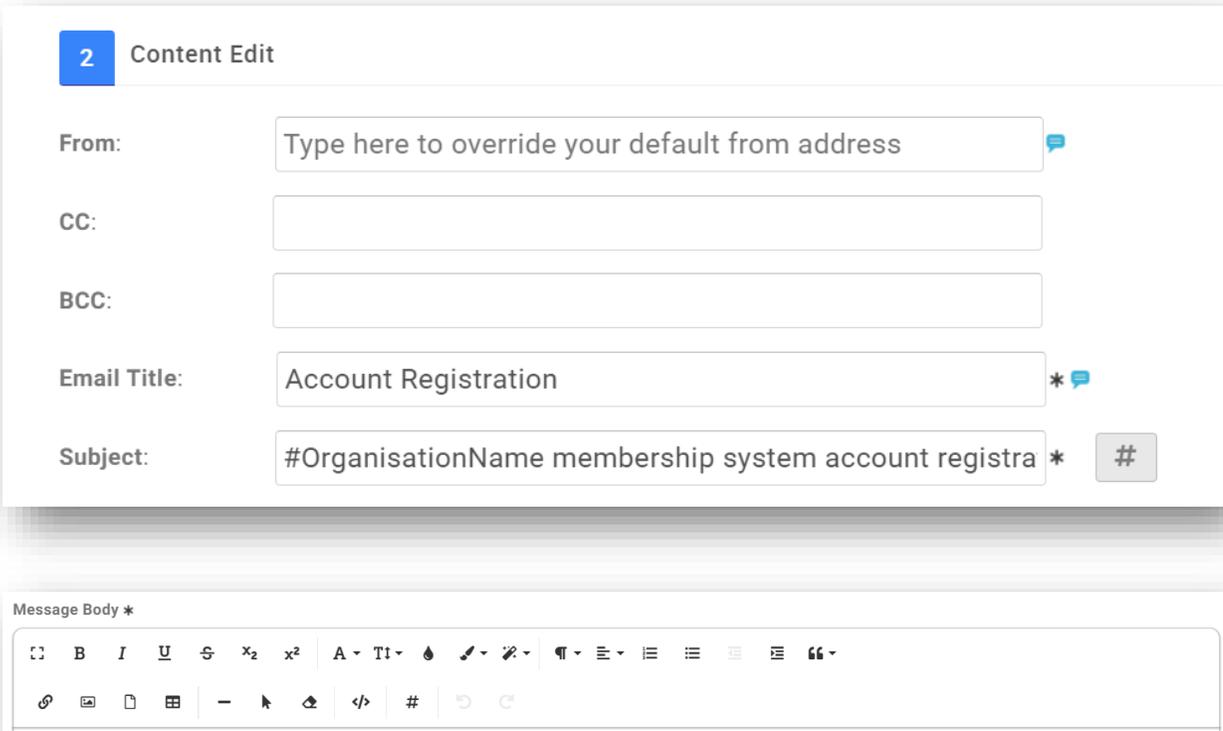
Schedule Type:

Schedule (In Days):

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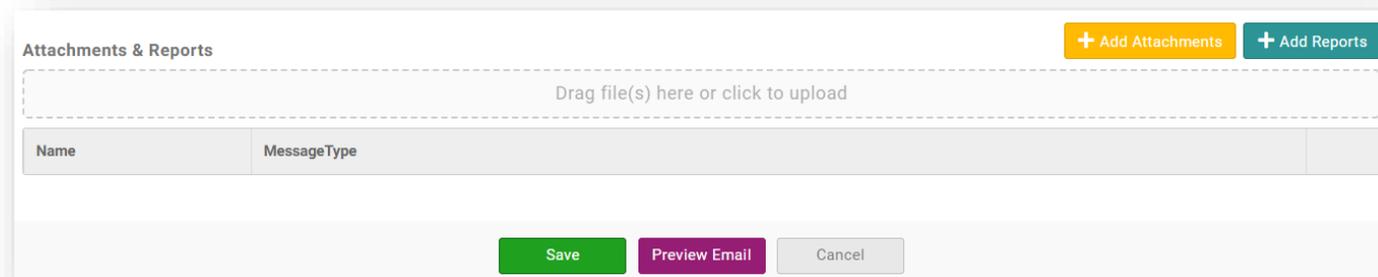
# How do I use Merge Tags?

Merge tags are dynamic values that are replaced when the email is being sent. This feature is only available at the subject and body of the email.



The screenshot shows an email composition window titled "2 Content Edit". It contains several input fields: "From:" with a placeholder "Type here to override your default from address", "CC:", "BCC:", "Email Title:" with the text "Account Registration", and "Subject:" with the text "#OrganisationName membership system account registra". A small grey button with a hash symbol (#) is located to the right of the subject field. Below the subject field is a "Message Body \*" section with a rich text editor toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, link, unlink, list, and quote.

# How do I add attachments an automated email?



Name	MessageType
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**Add Attachments:** Helps you to add attachments to the email.

**Add Reports:** links automated reports to the email.

**Note,** automated reports needs to be added to emails through JustGo Support.

The draft can be previewed before saving to make sure the email is right, you can also send test emails to yourself for validation through **Preview Email**. However, for test emails tags do not generate original data.

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# How do I activate my custom automated email?

After saving, the new email will be located at the bottom of the list in the email overview, now simply enable the green switcher to activate the email and disable the previous original one.

<input checked="" type="checkbox"/>	Event Booking		#OrganisationName Event Booki...	Event Booking	Default email	<input type="checkbox"/>  
<input checked="" type="checkbox"/>	Event Cancelled		#EventName has been cancelled	Event Cancelled	Default email	<input type="checkbox"/>  
<input checked="" type="checkbox"/>	Event Reminder (On Day)		Don't forget #EventName is hap...	Event Reminder (On Day)	Default email	<input type="checkbox"/>  
<input checked="" type="checkbox"/>	Failed		Were sorry but you have failed th...	Failed	Default email	<input type="checkbox"/>  
<input checked="" type="checkbox"/>	Passed		Congratulations, youve passed t...	Passed	Default email	<input type="checkbox"/>  
<input checked="" type="checkbox"/>	Receipt		Payment Confirmation	Receipt	Default email	<input type="checkbox"/>  
<input checked="" type="checkbox"/>	Refunded		Refund from #OrganisationName	Refunded	Default email	<input type="checkbox"/>  