

TITLE PAGE – NOTE BRANDING TBC, OPTION FOR STATES TO MANAGE LOCALLY

Table of Contents

Purpose.....	2
Support	2
Email Management – System Triggered Emails	3
Basic Details.....	5
Setting Up Club Email Templates	5
Send from Email Address & Cc'ing Club On An Email.....	6
Set-Up – Creating New or Changing System Triggered Emails.....	7
Profile Merge Fields in Club.....	7
List of Profile Merge Fields And Their Description	8
Activating / Deactivating System Triggered Emails	8

Purpose

This guide has been designed for Clubs who will be managing 100% of their Memberships online.

GoMembership is the National Membership and Events Portal for Surfing Australia, State Associations and their Boardrider Clubs and Surf Schools.

The following guide has been developed by Surfing Australia to assist Clubs with the setup of events.

Support

Need further support on this area or any other area in GoMembership? Contact your local Go! Membership support person:

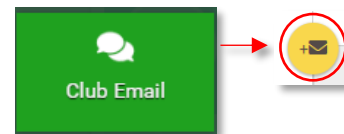
Location	Contact Name	Phone Number	Email
Surfing Western Australia	Katja Verreydt	0451 099 943	katja.verreydt@surfingwa.com.au
Surfing New South Wales	Rachel Schriever	0452 271 532	rachel@surfingnsw.com.au
Surfing Victoria	James Wilson-Browne	0431 248 474	james@surfingvic.com
Surfing Queensland	Shanice Ryder	0451985207	Shanice@surfingqueensland.com.au
Surfing South Australia	Kirra-belle Olsson	0415073254	Kirra-belle@surfingaustralia.com
Surfing Tasmania	Kirra-belle Olsson	0415073254	Kirra-belle@surfingaustralia.com

Club Emails

This is the best way to quickly and easily contact your members via email. Note – your club has a limit of 500 emails per month, inclusive of the automatic triggered emails shown below.

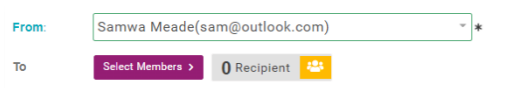
New Email

From the Menu, locate and click on the “**Club Email**” tile. On the new page, click on the small yellow circle with the envelope “**New Message**”.



Sender Email

When the page loads, you will see that the sender email address will be the one that is attached to the Member profile who is creating the email. If you require the emails to come from a Club specific email address you will either need to change your personal profile email address to the Club email address or you will need to set up a second profile with the Club email address, remembering to update passwords when Club personnel change, to ensure compliance with data privacy is maintained.



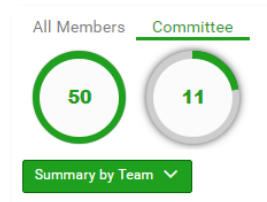
Recipient Options

To add recipients, click on the purple “**Select Members**” button. You will then be presented with a list of members in your Club. Using the green drop-down button under the infographic circles, you can change the view to see members by Club Membership, Member Role or Team.

Club Membership will group the members based on their membership with your Club. You will see all of your Club memberships in the Infographic Circles. Clicking on any of these will further refine the members displayed for selection.

Member Role will group the members based on the role they hold with your Club. You will see all the variances in the Infographic Circles. Clicking any of these will further refine the members displayed for selection.

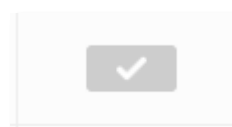
Team will group the members based on the team they are in within your Club. You will see all the teams you have set up in your Club in the infographic Circles. Clicking on any of these will further refine the members displayed for selection.



You can also use the search function to look for specific members. To select the members you want to send an email to you can either click on the tick box to the far right of their details or to select all members in view, click on the tick box in the header and you can untick any members as required.

Selecting Recipients

To select recipients, click on the tickbox to the far right of the member record. Alternatively, to select all members on the screen, click on the Tick Box in the header. If there is more than one page of members, you will need to move to the next page/s and select all members from each. Again you can use the tick box in the header to select all on a page.



As you make your selections, you will see the number in brackets on the “**Confirm**” button increase. When you have made your selection, click the “**Confirm**” button.



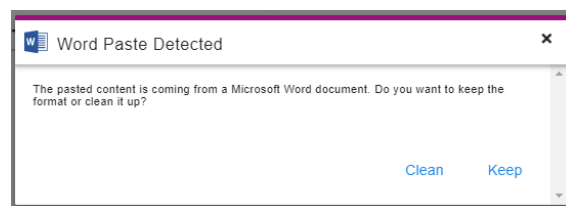
Click on “**Recipients**” at any time to view the members selected and delete any as required. You will need to click the small yellow icon at the end of the word recipients.

14 Recipients



Email Content

Within the email body, you have normal email functionality. You can also copy data from Microsoft Word and paste it into the email body. Doing so will result in a pop-up notification advising that “Word Paste Detected”. You will then have the option to keep the formatting as it appears in Word or to clear it down so it will be pasted in plain text. Any images copied from within the Word Document will also be copied to your email.



You can add images by clicking on the small image icon and selecting an image from your device

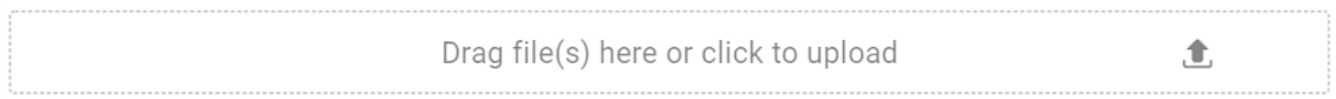


You can link a document in your text by clicking the upload file icon



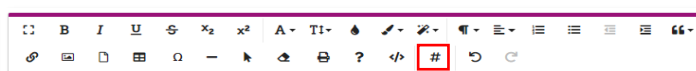
You can also add a file as an attachment by click on the email attachments area at the bottom of the screen.

Email Attachments



There are a range of other formatting options along the top of your email including Font type and size, colour of font and background, alignment, hyperlinks and bullet point formatting.

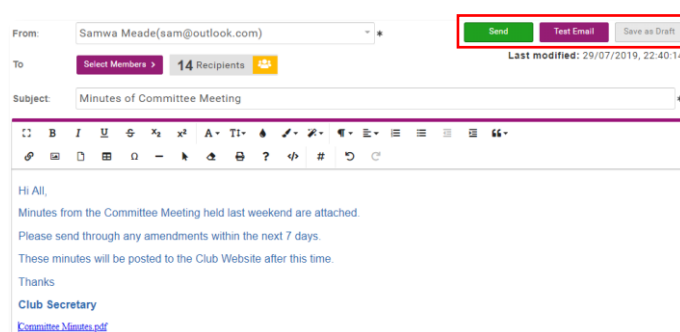
You also have the option to personalise your email by using “Profile Fields”. Click on the “#” from the email header area.



You will then be able to select from a list of Member fields including First Name, Last Name, email address etc. This way you can address the email directly to the Member rather than a generic “Hi All” or “Dear Members”.



When you are happy with your email, you can click the green “Send” button, or if you want to save it for later, you can click the “Save as Draft” button. You will then see this email in the email list when you go to Club Email next. You can then edit it or send when you are ready to do so.



If you send a test email, any merge fields you use will come through as their merge field rather than the data itself. i.e #FirstName will appear on the test email as “#FirstName” rather than “Samantha”. These fields will populate as expected in the actual emails providing they are entered correctly.

Email Management – System Triggered Emails

GoMembership has pre-defined emails that are triggered by system events such as membership purchases, renewal notifications and when someone registers for an event. Surfing Australia, your State body and Go Memberships have pre-loaded generic text for these emails as well as a generic template. However, each Club can **customise** both the **content** and **template** to be specific to your Club.

The emails will only send for your Club if they are set to **‘Active’**. Your Club’s Email Management profile has been set with the core default emails set to ‘Active’ and for Clubs that are offering online payments, it is recommended that you leave these settings in place and just focus on customising the content and template.

Please note that **Email Management** system triggered emails are a separate functionality to **“Club Email”**, and these triggered emails included with the 500 emails you can send per month via Club Email.

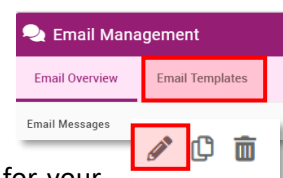
Basic Details

From the menu, locate and click on the **“Email Management”** Tile which is under the Club+ section. You will then see a list of all the system triggered emails already set-up for your Club. It is important to note that GoM default emails as well as Surfing Australia emails are loaded into the system, so ensure you select the right emails for your club.

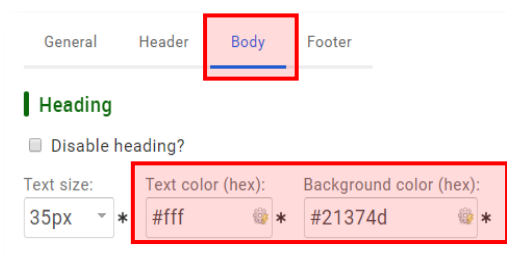
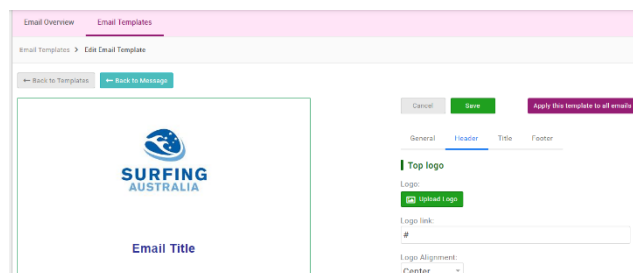


Setting Up Club Email Templates

- From the menu bar at the top of the **Email Management** screen, select **“Email Templates”** then you will see that there is a template already uploaded – you can use this as is, or edit as you see fit.
- Click on the **edit pencil** to access the generic template that has been loaded for your Club. You can update Club details and customise this template to include your own Club logo and Club colours etc.
- The **“Organisation Name”** and **“Organisation Email”** details are extremely important as the details written in **“Organisation Name”** will be used to populate **#merge fields** in the email content and **“Organisation Email”** is the default email address all system triggered emails will be sent from (and replies received to). The details have been pre-populated based on information that Surfing Australia was provided however you can change this as required and then press **Save**.



- d. To update the logo click on “**Header**” and then “**Upload Logo**”. You can also enter a link such as your website to the logo so that when it is clicked on, it will link the user out to that website.



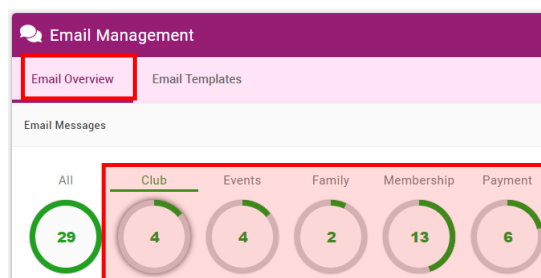
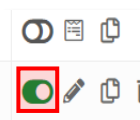
- e. To change the colour of the blue heading band or the text within it, click on **Body** then click on the cog next to Background colour and Text colour. You can select from set colour options or manually key in the Hex code for your logo colour.

- f. Surfing Australia have pre-loaded a default message for the **Footer** text which you can also update by clicking on **Footer** and overwriting the text, however it is important to note that the core sentiment of the message is required under Australian Privacy Law.
- g. Once you have finished making changes to the template click **Save** to exit.

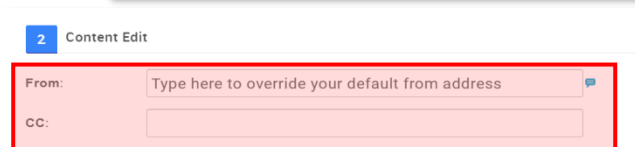
Send from Email Address & Cc'ing Club on An Email

As outlined on page one, all system triggered emails will send from the email address that is entered into the “**Organisation Email**” field on the club **Email Template**. You can override this for a specific email type if required.

- a. From the menu bar at the top of the **Email Management** screen, select “**Email Overview**” then you will see **circle icons** that you can click on to access the topic specific emails. The emails marked with the **green tab** are the emails that are set to **active**.



To edit the send email address of an individual system triggered email, click on the **edit pencil**, key the desired email address into the **From** field under **Content Edit**.



- b. If you wish to CC (copy) or BCC (blind copy) the Club on a specific email, enter in the email address in the **CC** or **BCC** field.

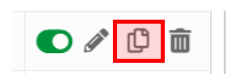
Set-Up – Creating New or Changing System Triggered Emails

You can create or modify existing system triggered emails based on an existing email. The Subject outlines the trigger, which the Scheme Name gives a brief of what the email will be used for.

- a. For more details about emails already set up in the system, click on the View button in the right-hand column. This will show you what the email is sent for and the content of that email.

The screenshot shows the 'Email Management' interface. At the top, there are tabs for 'Email Overview' and 'Email Templates'. Below these, there's a summary section with circular progress indicators for different categories: All (17), Club (2), Events (2), Family (1), Membership (5), and Payment (7). Below this is a table with columns: Email Name, Options, Subject, Scheme Name, Template Name, and Actions. The table lists three email messages: 'Club Join Invitation (Member)', 'Join Notification (Club)', and 'Event Booking'. Each message has a 'View' button in the Actions column.

- b. Once you have located the email you wish to use as your base for setting up a new email, return to the **Email Overview** page and click on the **Copy** icon. Rename the copied email to a relevant name in the **Name** field then customise the content within as desired.



Do not forget to select the correct Email Template to ensure you get the correct branding for your club!

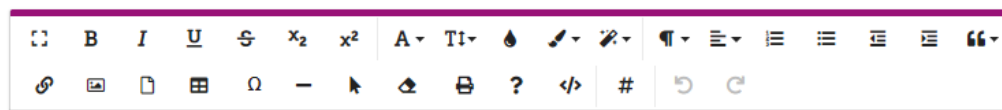
Email Template: * Edit Templates

Profile Merge Fields in Club

In the Club Email, you can personalise emails using profile merge fields which pull directly from the recipients' profile.

For example, rather than beginning your email with **"Dear All"** or **"Dear Members"**, you can begin it with Dear **#FirstName**. This will read the data in the recipients First Name field and the recipient (named Samantha) will receive **"Dear Samantha"**.

You can manually type in any of the merge fields listed below within your email, or you can select them from a list by clicking the **"#"** from the formatting panel of the email.



The dialog box titled 'Select a profile field to insert' contains a table with the following fields and checkboxes:

Profile Field	
#LoginId	<input checked="" type="checkbox"/>
#FirstName	<input checked="" type="checkbox"/>
#LastName	<input checked="" type="checkbox"/>
#Mobile	<input checked="" type="checkbox"/>
#LastPasswordUpdateDate	<input checked="" type="checkbox"/>
#EmailAddress	<input checked="" type="checkbox"/>
#DOB	<input checked="" type="checkbox"/>
#Gender	<input checked="" type="checkbox"/>
#Address1	<input checked="" type="checkbox"/>

Close

When you locate the desired profile field, click on the tick box to the right-hand side and this will insert the field into your email body.

List of Profile Merge Fields

#LoginId

Member's Username that is used for logging into their Account

#FirstName

Member's First Name

#LastName

Member's Last Name

#DOB

Member's Date of Birth

#Gender

Member's Gender

#MID

The Member's Membership/Account Number.

#Mobile

Data in the Contact Number of the Member's Account

#EmailAddress

Email Address on Member's Account

#Address1

Data in Line 1 of the Address Field on the Member's Account

#Address2

Data in Line 1 of the Address Field on the Member's Account

#Town

Data in the Suburb Field on the Member's Account

#County

Data in the State Field on the Member's Account

#Country

Data in the State Field on the Member's Account

#PostCode

Data in the Post Code field on the Member's Account

#JoiningDate

The date the Member signed up in the system for an account. For imported Member's this field will be blank.

#LastPasswordUpdateDate

Date Member last updated their password

Activating / Deactivating System Triggered Emails

The emails marked with a **green tab** are the **active** system triggered emails.

