Camp & Class Manager

Advanced Email Editor Release 9.1

March 19, 2019

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Communications 1.0

In order to allow a higher level of customization in agencies' email communications and marketing efforts, a new three-step communication workflow with improvements to existing features have been implemented in the Admin Site. Agency users can now:

- Customize new templates, emails or reminders by dragging-and-dropping various components.
- Insert dynamic fields in the email subject line to better target recipients and increase opening rates.
- Use a saved, customized template to send emails or reminders.
- Track sent emails or templates with more detailed analytics.
- Send confirmation, reminder, invitation or report emails, or email a family using the new three-step workflow.

For old email templates, the following conversion rules apply:

- When agency users use an old template to create broadcast emails, confirmation emails or reminders, the new workflow is displayed, allowing template reuse or customization. After save, customers will receive the newly converted template.
- When agency users use an old template for campaign emails, the new workflow does not apply and customers will still receive the old template.
- When agency users open an old template directly (Admin Site > **Email** tab > **Templates** link), the new workflow is displayed. After save, the old template is converted to a new template for agency users to create broadcast emails, confirmation emails, reminders or campaign emails, and customers will receive the newly converted template.

New Template Workflow

The new template workflow (Admin Site > **Email** tab > **New** button > **New template**) now contains the following three steps:

Step 1: Template information

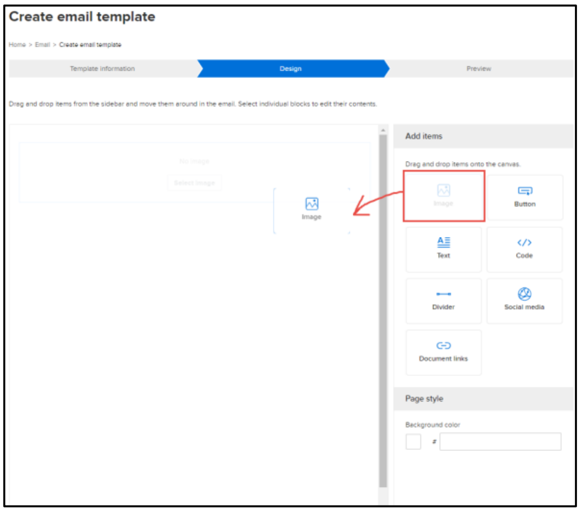
In this step, agency users can insert dynamic fields from the following audiences in the subject line by clicking the new **Insert merge fields** dropdown list:

- Family level
  - Primary parent first name
  - Primary parent last name
  - Secondary parent first name
  - Secondary parent last name
  - Family balance
- Participant level
  - Participant first name
  - Participant last name
- Registration level
  - Session name
  - Session type
  - Session location name
  - Session start date
  - Session end date
  - Session start time
  - Session end time
  - Registration balance
  - Group Assignment

Step 2: Design

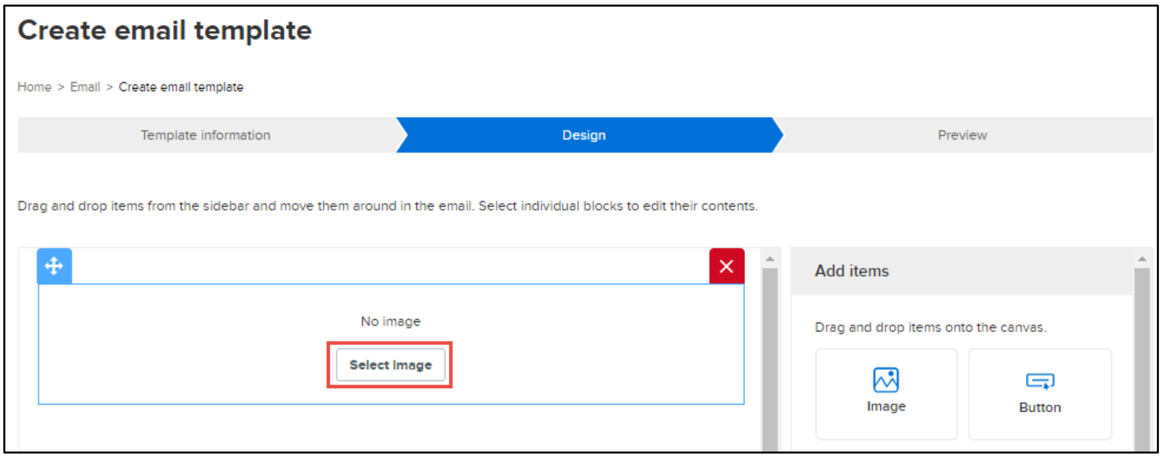
In this step, agency users can drag-and-drop different items onto the template canvas, including images, buttons, text, custom HTML code, section dividers, social media links and document links.

To customize an item, click on the item on the canvas and the item properties will appear in the lower-right corner.

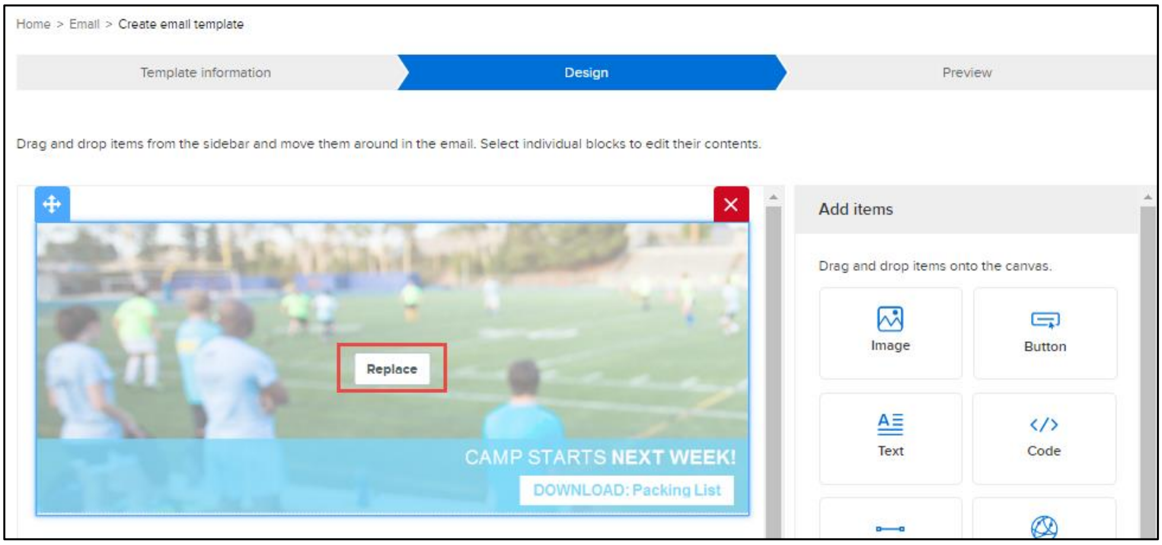


- Add an image:
  To add an image to the template, under the **Add items** section, drag-and-drop the **Image** icon onto the canvas on the left.

  Agency users can then select an existing image from the image library, or upload a new image under 2 MB. On the **Select image** popup, agency users now can search for an image by name or image type.

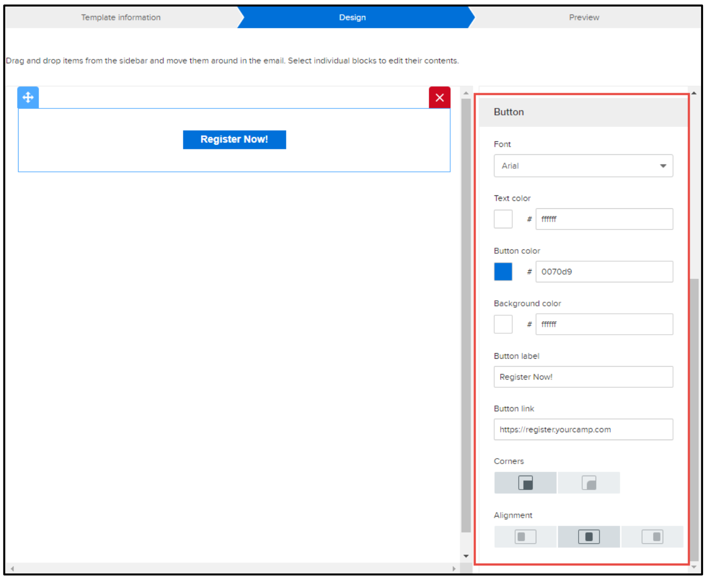


To replace an inserted image, hover the cursor over the image and then click **Replace**.

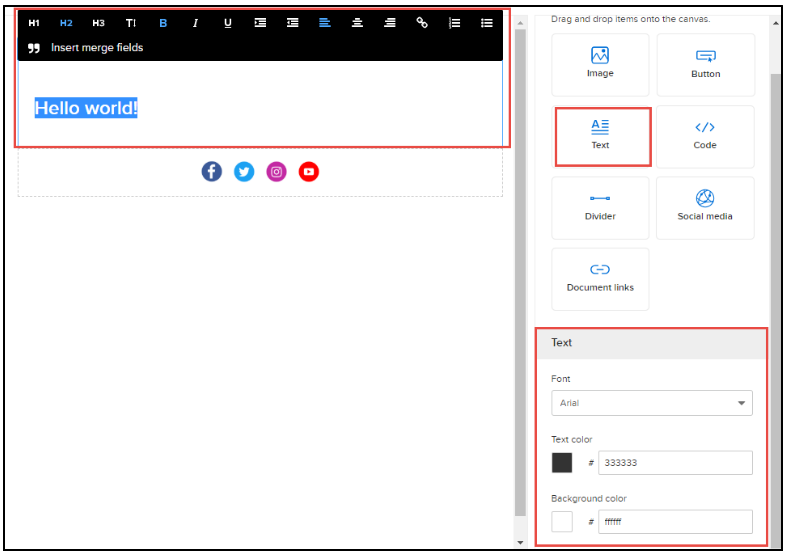


- Add a button:
  To add a button to the template, drag-and-drop the **Button** icon onto the canvas.

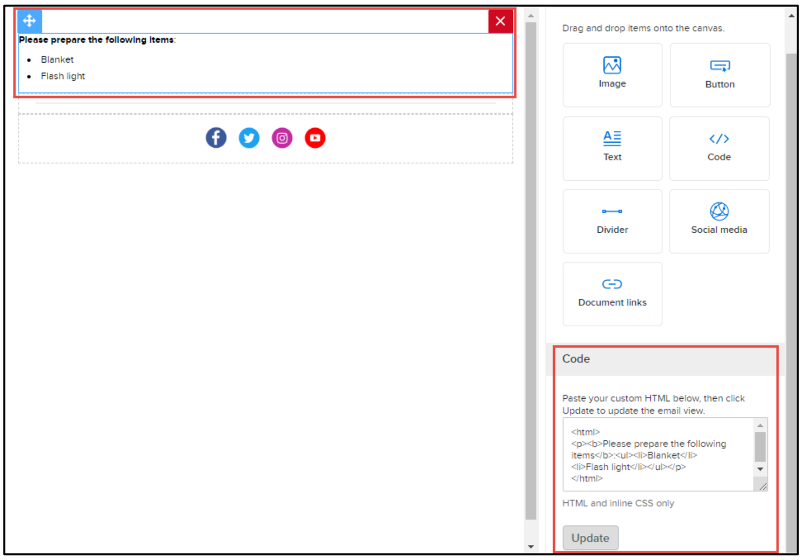
  To customize the button, click the item and then edit the **Button** properties as required:



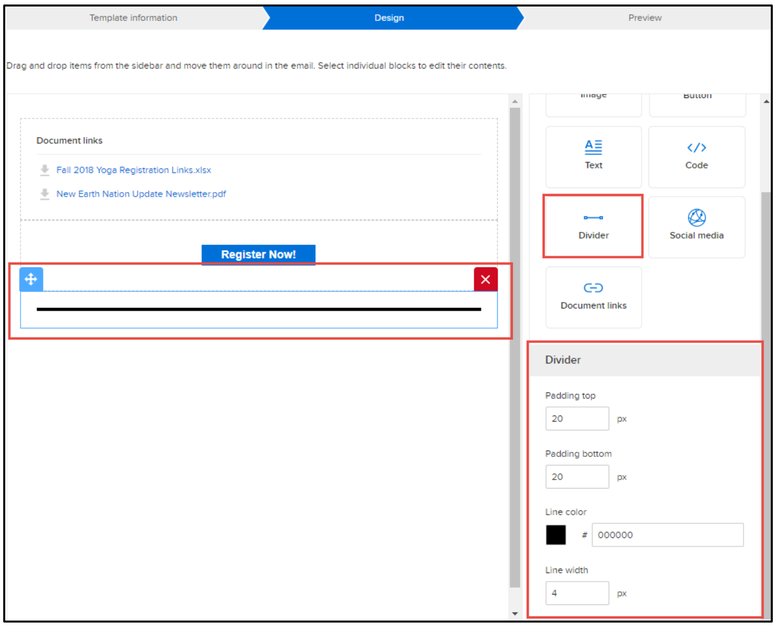
- Add customized text:
  To add customized text to the template, drag-and-drop the **Text** icon onto the canvas. Agency users can then type or paste customized text in the editor, or change the text display properties as required.



- Add custom HTML code:
  To add custom HTML code, drag-and-drop the **Code** icon onto the canvas, and then type or paste HTML code in the code editor in the lower-right corner. A preview of the code is immediately displayed on the canvas.

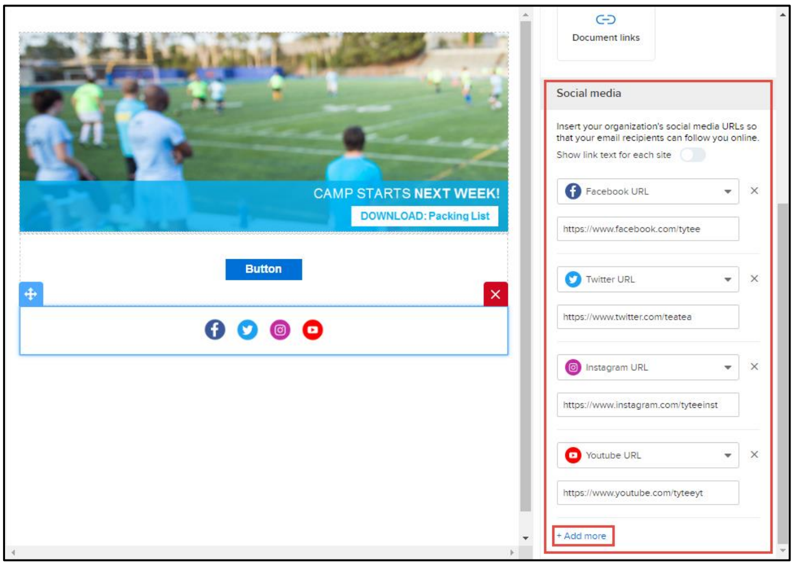


- Add a divider:
  To add a divider to the template, drag-and-drop the **Divider** icon onto the canvas. Agency users can then drag the divider up and down, or change the divider properties (paddings, color and width) as required.



- Add social media links:
  To add the organization's social media links, drag-and-drop the **Social media** icon onto the canvas. Four types of social media links are available: Facebook, Twitter, Instagram and YouTube. Click **+ Add more** to add up to 10 social media links to a template.

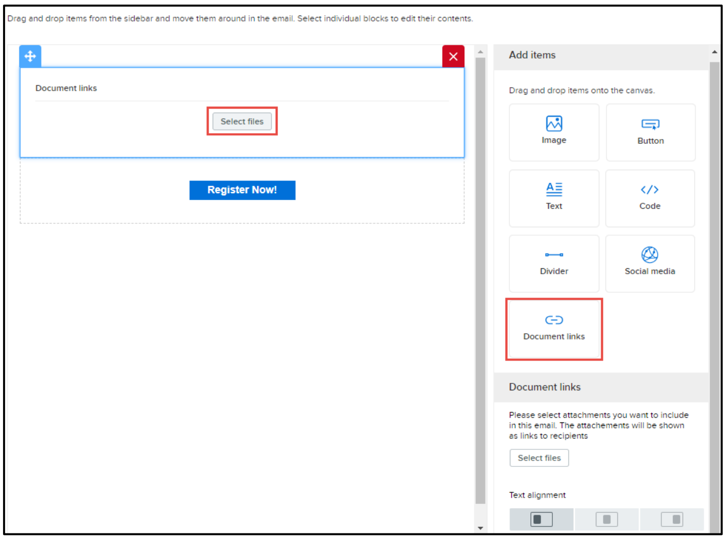
  Agency users can now customize social media links for each template without affecting the default links configured at the agency level (Admin Site > icon > **Settings** > **Social media** link), and the agency-level **Social media** page now also includes Instagram and YouTube:

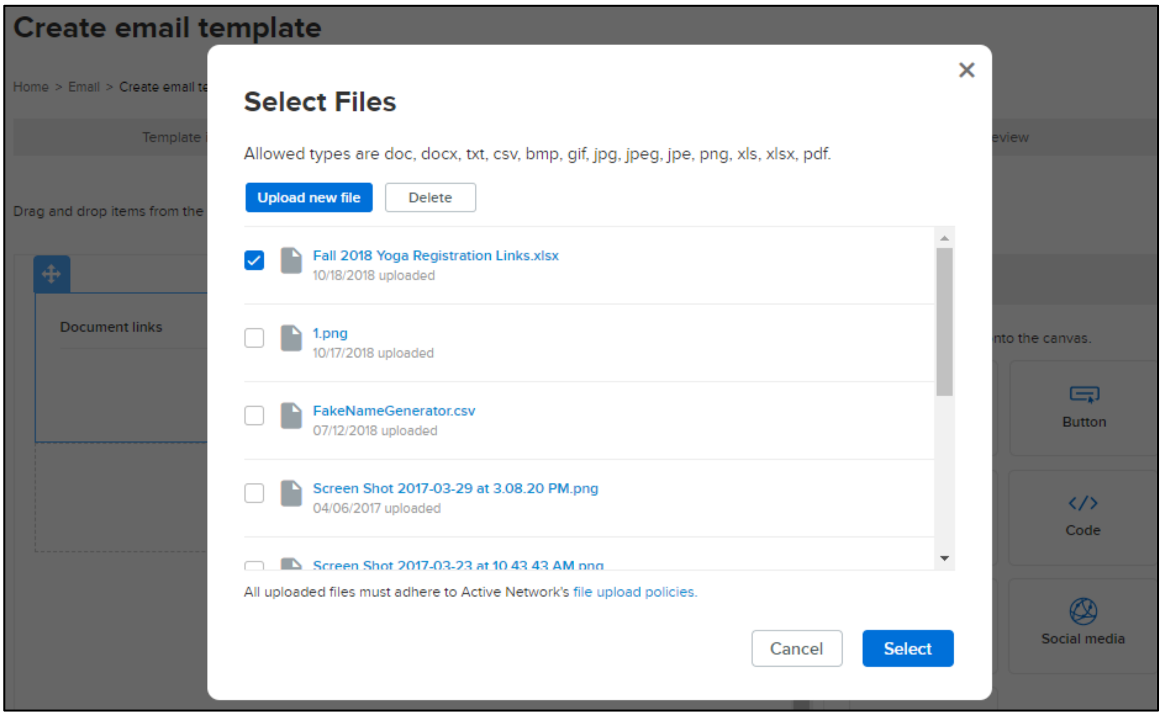


When first-time agency users set up a new season, on the **Account information** page, social media links now also include Instagram and YouTube.

- Add document links:
  To add links to documents (such as waivers or registration forms), drag-and-drop the **Document links** icon onto the canvas.

  Agency users can then select existing files from the file library, or upload a new file.

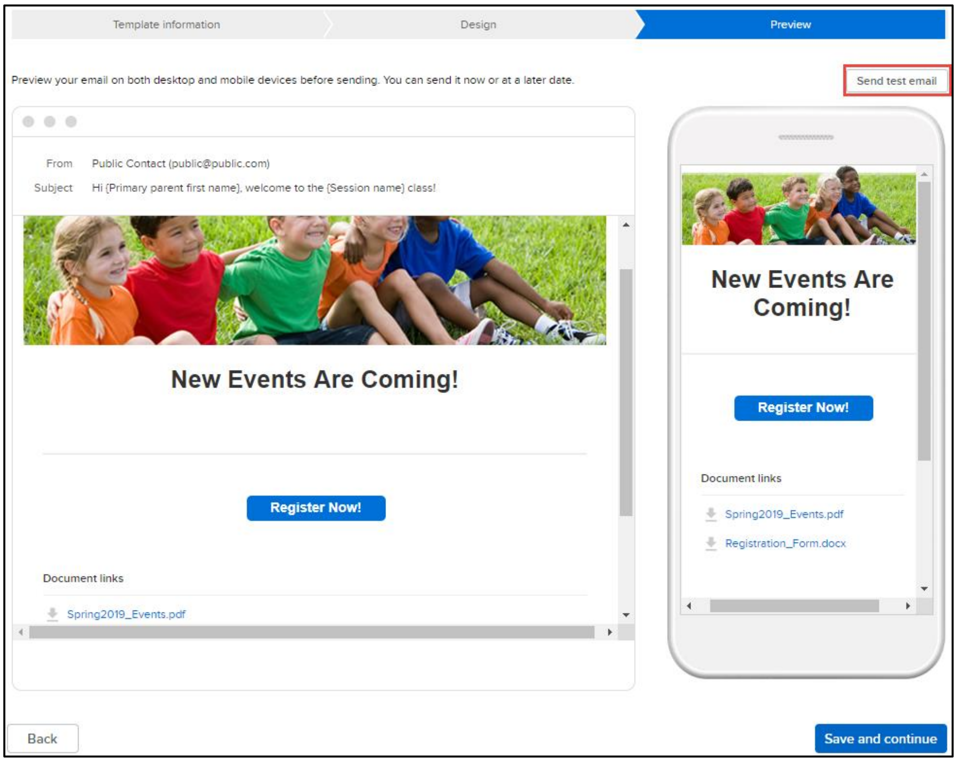




When all required items have been added to the template and customized, click the **Save and continue** button to procced to the next step.

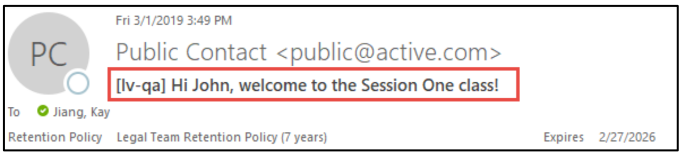
<u>Step 3: Preview</u>

In this step, the customized template is displayed in both desktop and mobile previews, and agency users can send a test email to up to five email addresses.



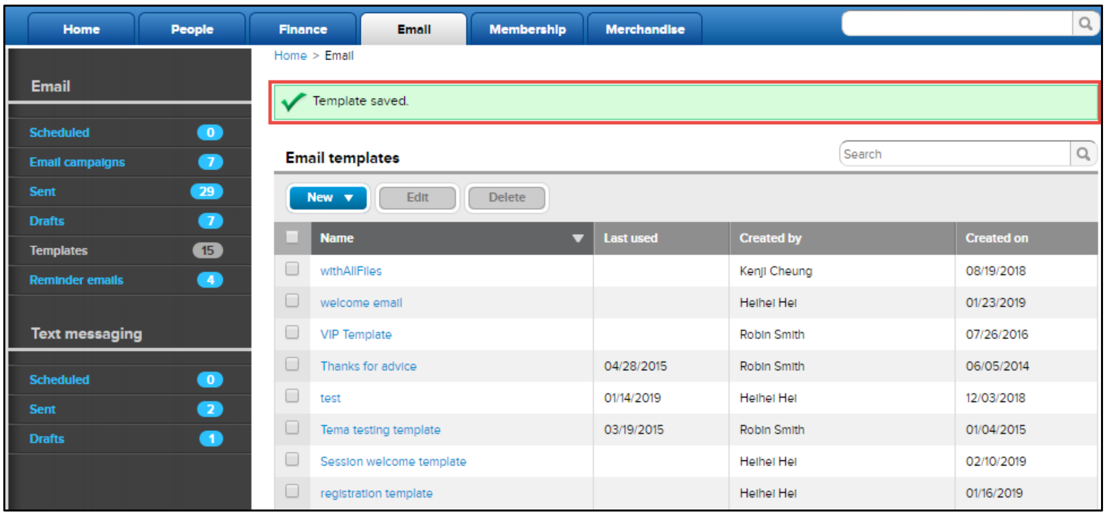
Note: If the template includes merge fields in the subject field, then the test email subject line will display preset, testing values different from the actual email subject line. For example:

<u>Test email received</u>:



<u>Actual email received</u>:

After clicking the **Save and continue** button on the **Preview** page, the new template is now saved.

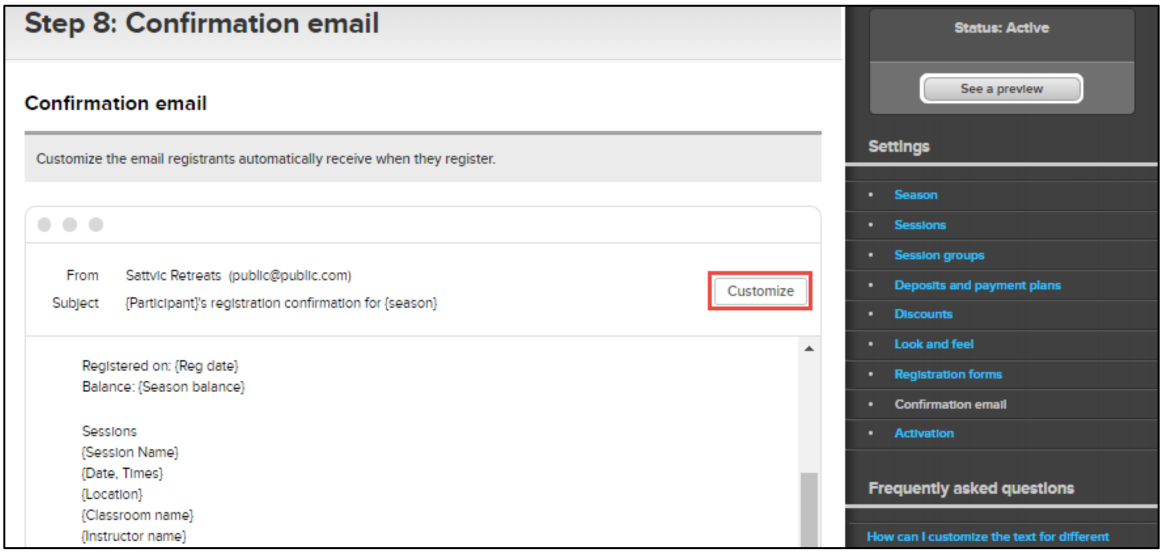


Season Setup: Confirmation/Reminder/Invitation Email using New Template Workflow

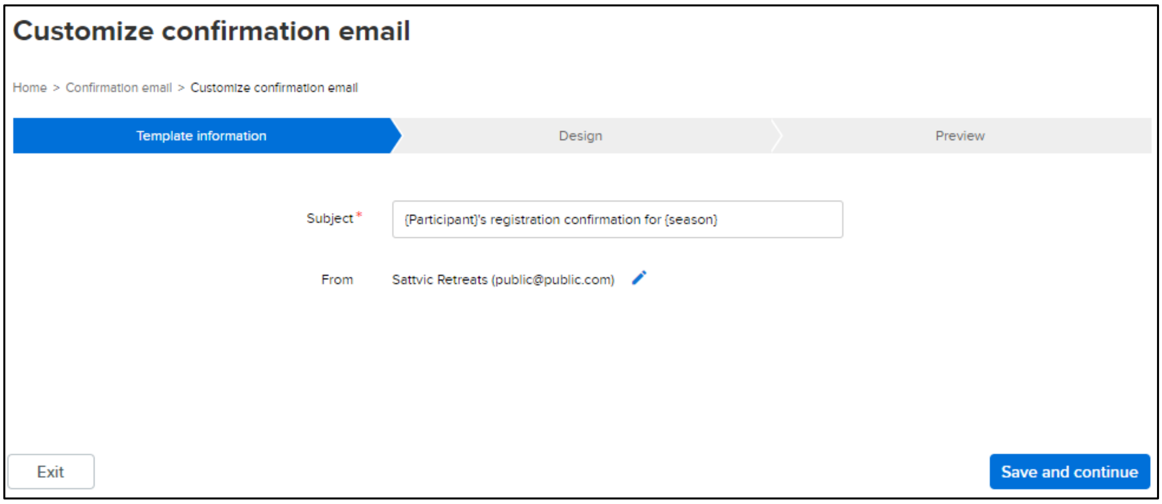
During season setup, the new template workflow appears when agency users edit confirmation email or reminder email (cart abandonment email) templates for a particular season.

Confirmation email:

Location: **Home** tab > a season > **Setup** > **Settings** > **Confirmation email** > **Confirmation email** section



After clicking the **Customize** button, the new template workflow is displayed.



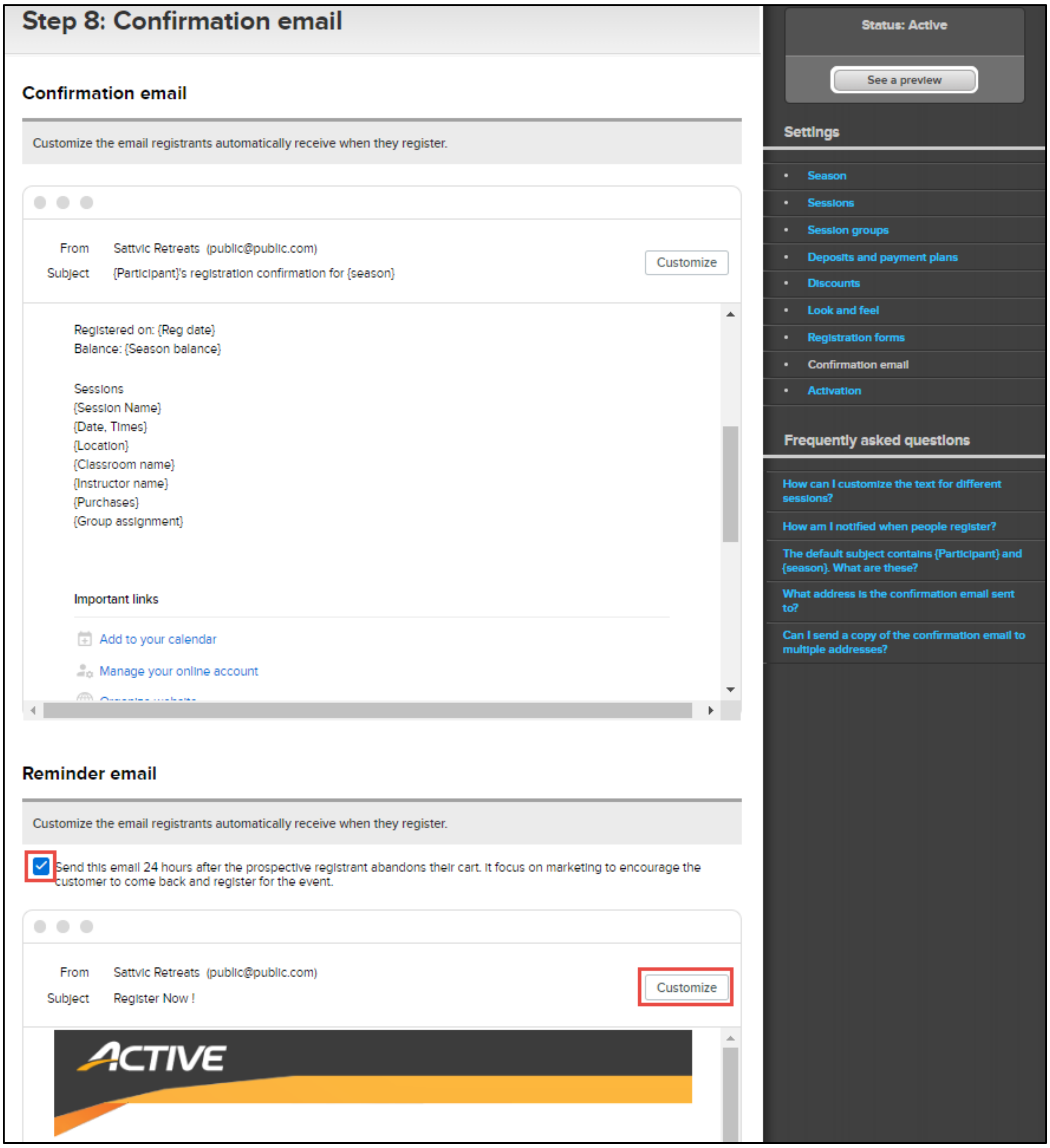
Note:

For the **Text** item in the **Design** step of a confirmation email, agency users can now:

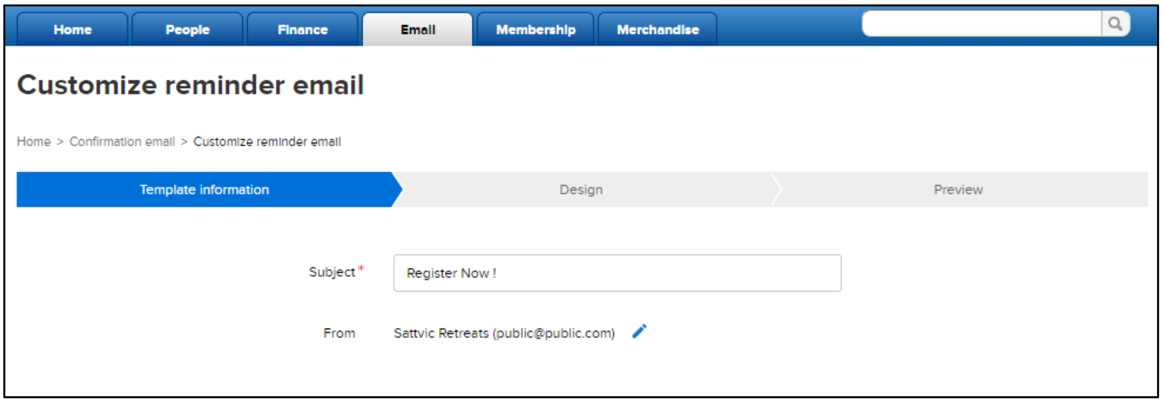
- Edit and delete the default "Thank you for registering" text editor item in the default confirmation email template (other default text editors are not editable and cannot be deleted).
- Select which sessions the customized text will be displayed for by using the new **Conditional Display** property. If specific sessions are selected, then in the **Preview** step, a reminder message is displayed.

<u>Reminder email (cart abandonment email)</u>:

Location: **Home** tab > a season > **Setup** > **Settings** > **Confirmation email** > **Reminder Email** section checkbox



After clicking the **Customize** button, the new template workflow is displayed.



New Email Workflow

The new email workflow (Admin Site > **Email** tab > **New** button > **New email**) now contains the following three steps, which are similar to the template workflow:

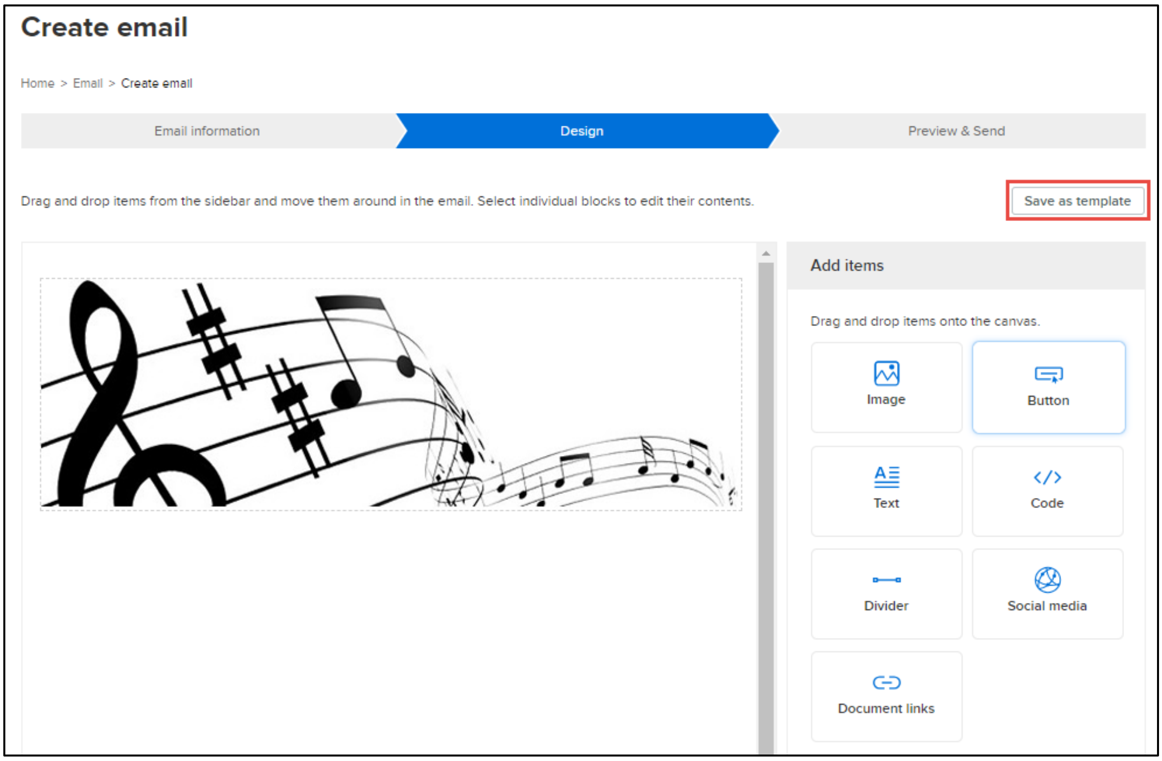
Step 1: Email Information

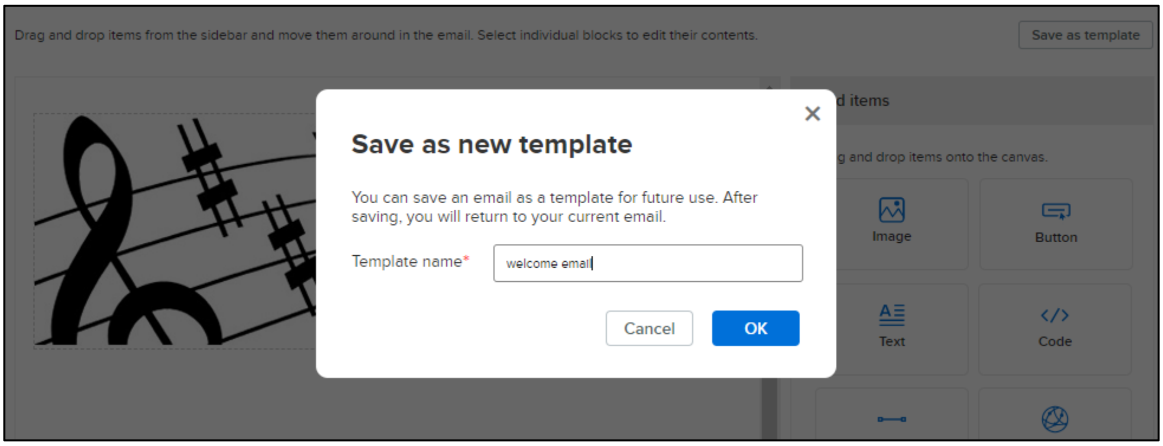
In this step, agency users can insert dynamic fields for the following audiences in the subject line by clicking the **Insert merge fields** dropdown list:

- Family level
  - Primary parent first name
  - Primary parent last name
  - Secondary parent first name
  - Secondary parent last name
  - Family balance
- Participant level
  - Participant first name
  - Participant last name
- Registration level
  - Session name
  - Session type
  - Session location name
  - Session start date
  - Session end date
  - Session start time
  - Session end time
  - Registration balance
  - Group Assignment

Step 2: Design

In this step, the same items as in the template workflow are available to be dragged-and-dropped onto the canvas. See section New Template Workflow > Step 2: Design for detailed information on each item.
During email design, agency users can now save the email as a template by clicking the **Save as template** button, and then reuse it when creating other emails:





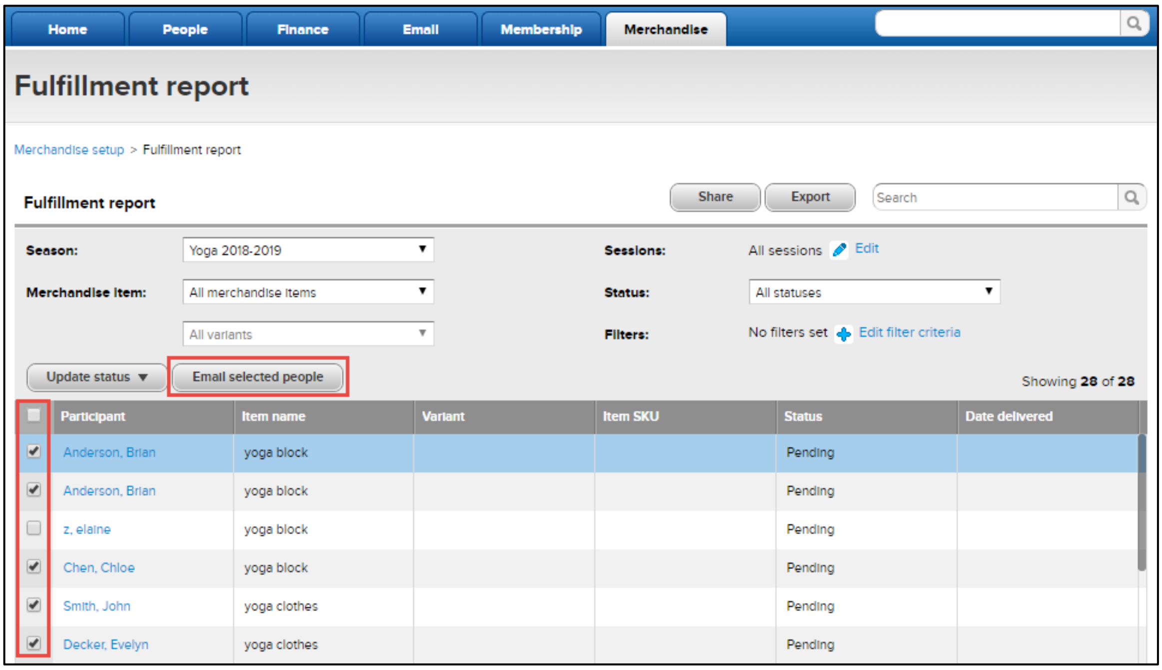
Step 3: Preview & Send

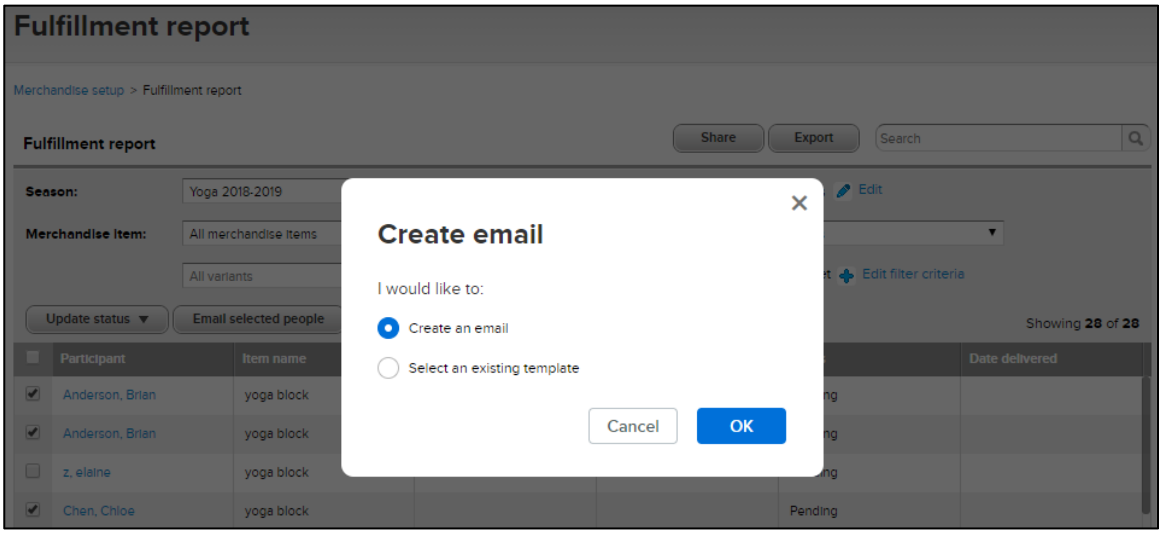
Sending Reports using New Email Workflow

When sending the following reports or forms, after agency users select the required recipients and then click the **Send email** or **Email selected people** button, the new email workflow is displayed. The path displayed on the email page indicates which specific report or form the email is for.

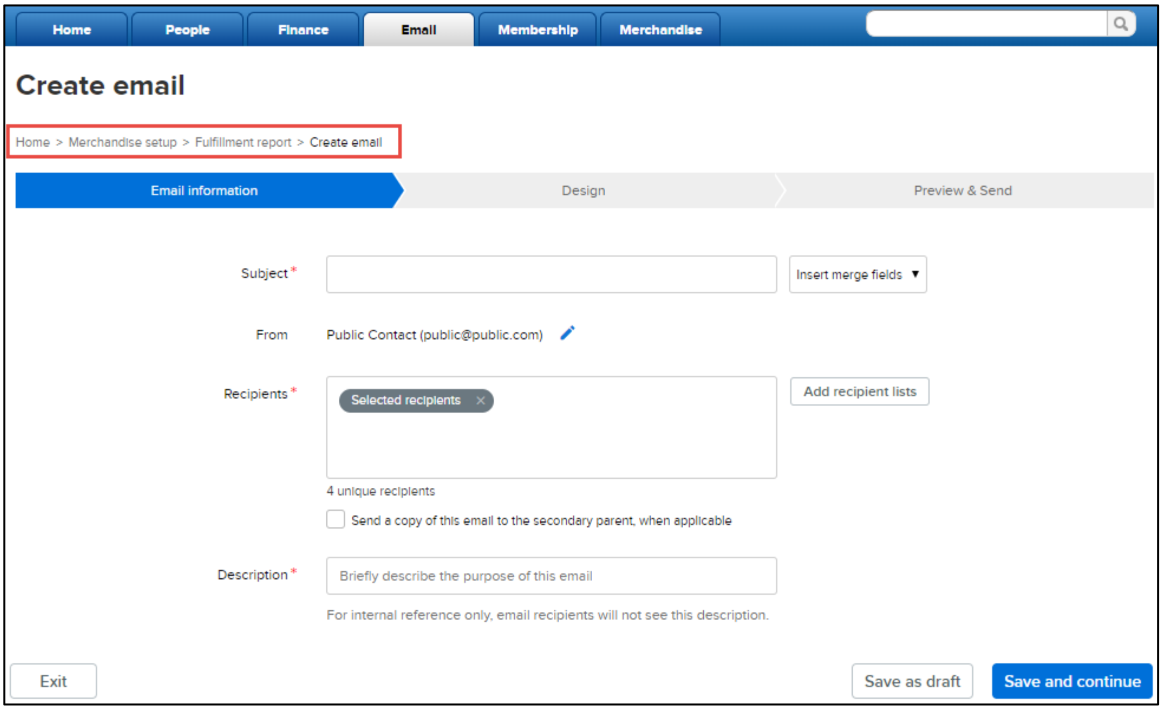
- Financial reports (Admin Site > **Finance** tab > **Reports** tab):
  - **Accounts receivable** report
  - **Credit balance report**
  - **Deferred revenue report**
  - **Failed payment report**
  - **Payment plan report**
- **Member roster report** (Admin Site > **Membership** tab > **Member roster report** link)
- Season reports (Admin Site > **Home** tab > a season > **Reports**):
  - **Cart abandonment e-mail report** (note: emailing this report does not support **Insert merge fields** in the email subject line)
  - **Daily Attendance Report**
  - **Participant attendance report**
  - **Waitlist report**
  - **New custom report** or saved custom report
- Merchandise **Fulfillment report** (Admin Site > **Merchandise** tab > **Fulfillment report** link)
- Season supplemental forms (Admin Site > **Home** tab > a season > **Supplemental forms** tab)
- Session dashboard report (Admin Site > **Home** tab > a season > **Sessions** > **Send email** button)

The following screenshots use the merchandise **Fulfillment report** as an example:





In this example, on the **Create email** page, the path indicates that this email is for the merchandise fulfillment report:



Emailing Family using New Email Workflow

When agency users send emails to the following recipients, the new email workflow is displayed.

- Family (Admin Site > **People** tab > **Parents** > a parent > **Send email**)
- Participant (Admin Site > **People** tab > a person > **Current seasons** > **View** > **Send email**)

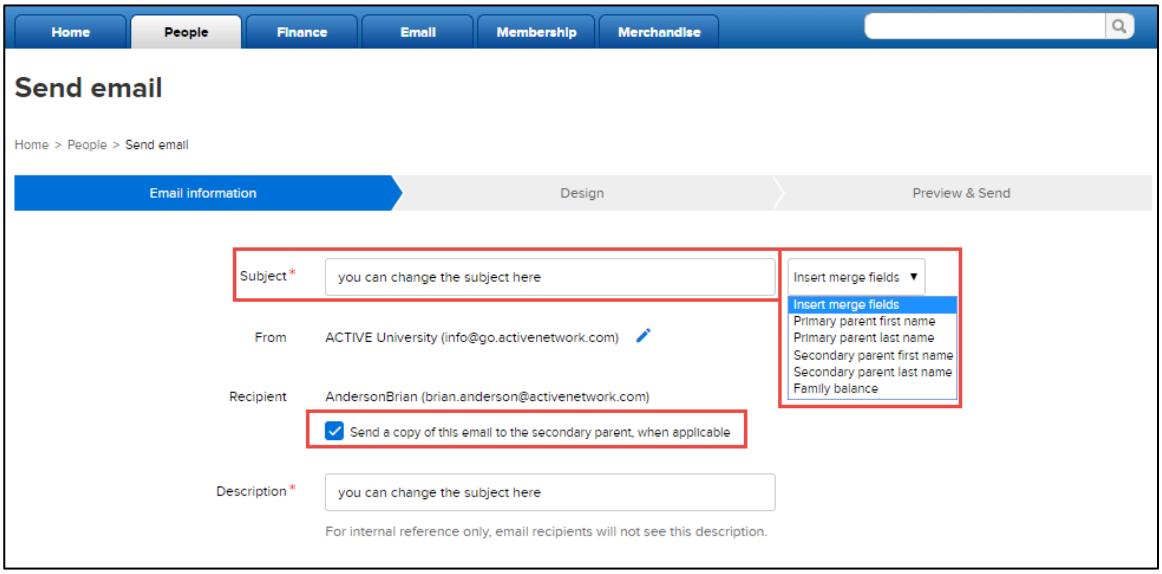
Note: in this case, the **Recipient** field is pre-filled with the selected family or participant and cannot be changed.

New features include:

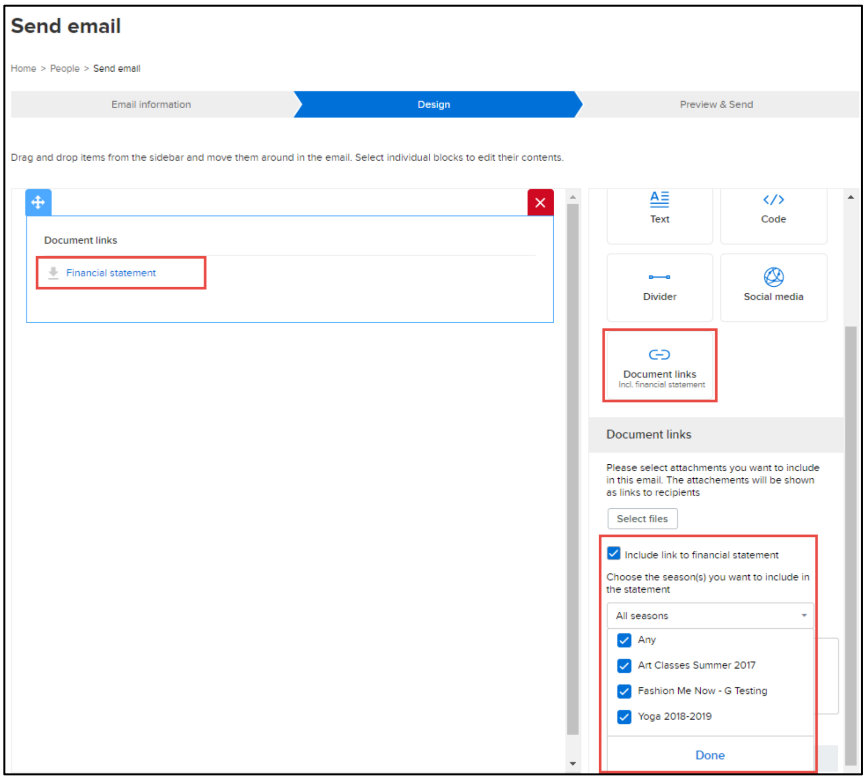
- Create an email from an existing template when emailing families or participants.
- If using an existing template, then changing the email subject will not affect the original template.
- In the **Subject** field, insert the following family-level dynamic fields from the **Insert merge fields** dropdown list to better target the email subject and increase opening rates:

- Primary parent first name
- Primary parent last name
- Secondary parent first name
- Secondary parent last name
- Family balance

- Send a copy of the email to secondary parent by clicking the new checkbox:



- In the **Design** step, include a financial statement by dragging the **Document Link** icon onto the canvas.
  - If the **Include link to financial statement** checkbox is checked, then all seasons are included in the financial statement by default. Agency users can uncheck seasons as required.



New Reminder Workflow

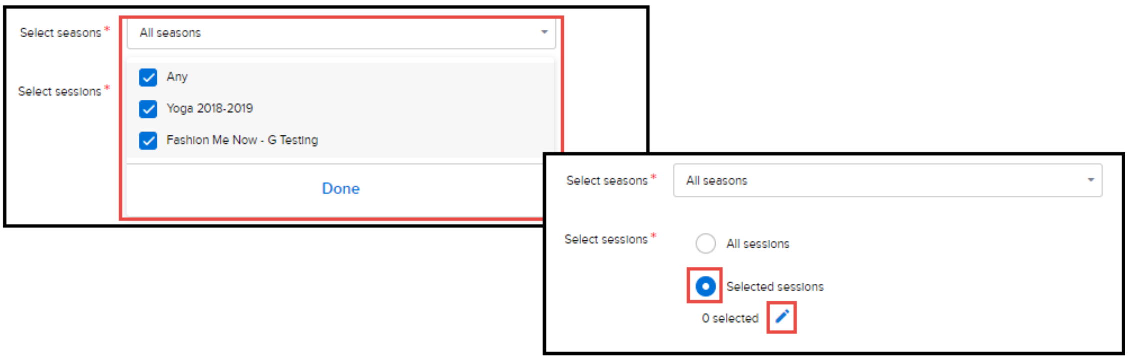
The new reminder workflow (Admin Site > **Email** tab > **New** button > **New reminder**) now contains the following three steps, which are similar to the template workflow:

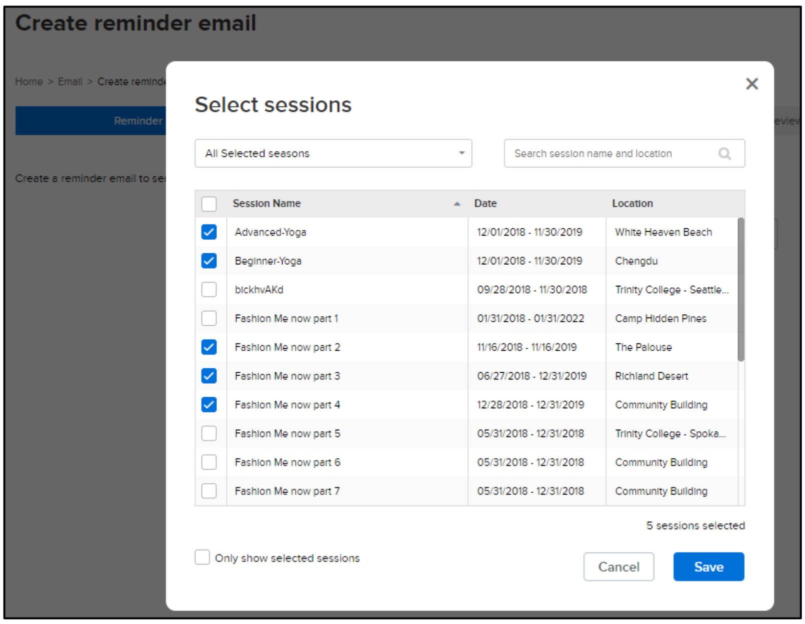
Step 1: Reminder information

In this step, agency users can insert dynamic fields for the following audiences in the subject line by clicking the **Insert merge fields** dropdown list:

- Family level
  - Primary parent first name
  - Primary parent last name
  - Secondary parent first name
  - Secondary parent last name
  - Family balance
- Participant level
  - Participant first name
  - Participant last name
- Registration level
  - Session name
  - Session type
  - Session location name
  - Session start date
  - Session end date
  - Session start time
  - Session end time
  - Registration balance
  - Group Assignment

Agency users can now select multiple sessions from different seasons using the **Select seasons** dropdown list and **Select sessions** radio button (previously, the **Select sessions** option was only available when a single season was selected):

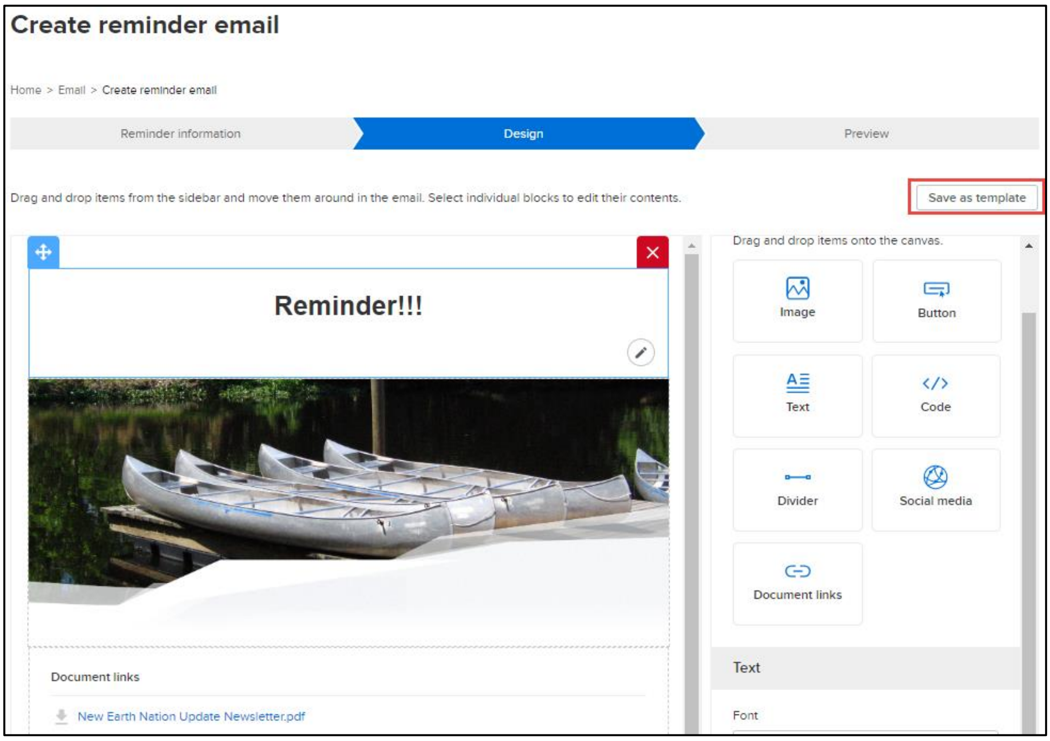




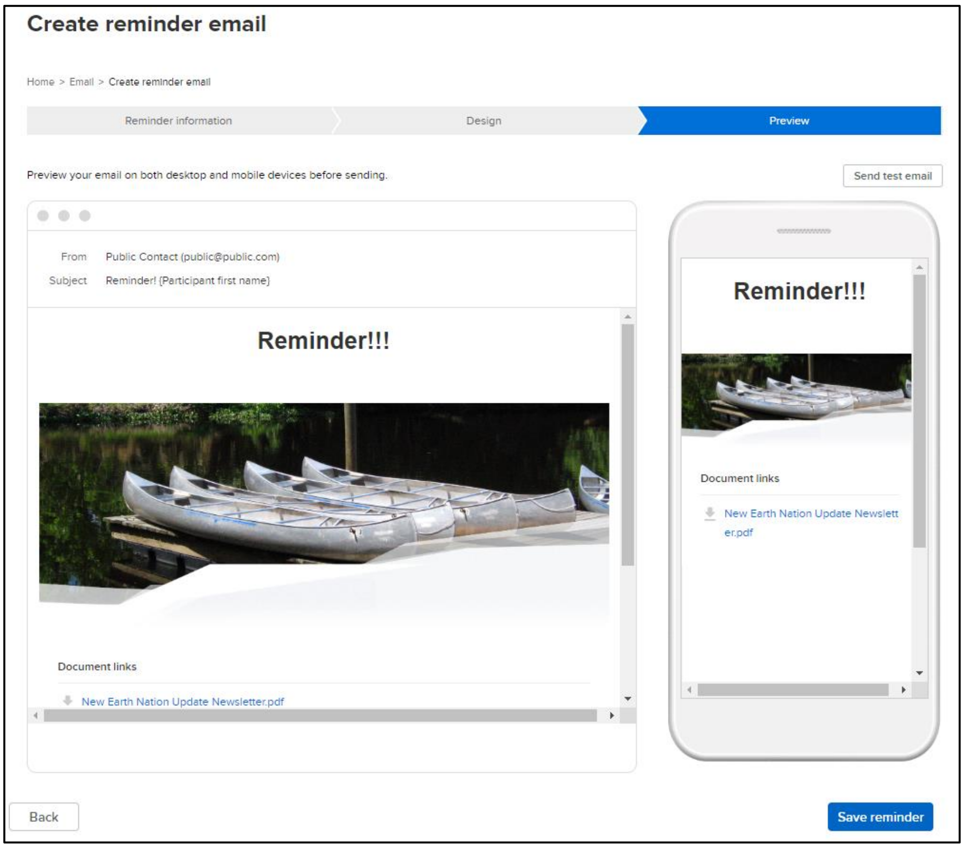
Step 2: Design

In this step, the same items as in the template workflow are available to be dragged-and-dropped onto the canvas. See section New Template Workflow > Step 2: Design for detailed information on each item.

During reminder email design, agency users can now save the reminder email as a template by clicking the **Save as template** button, and then reuse it when creating other reminder emails.



Step 3: Preview



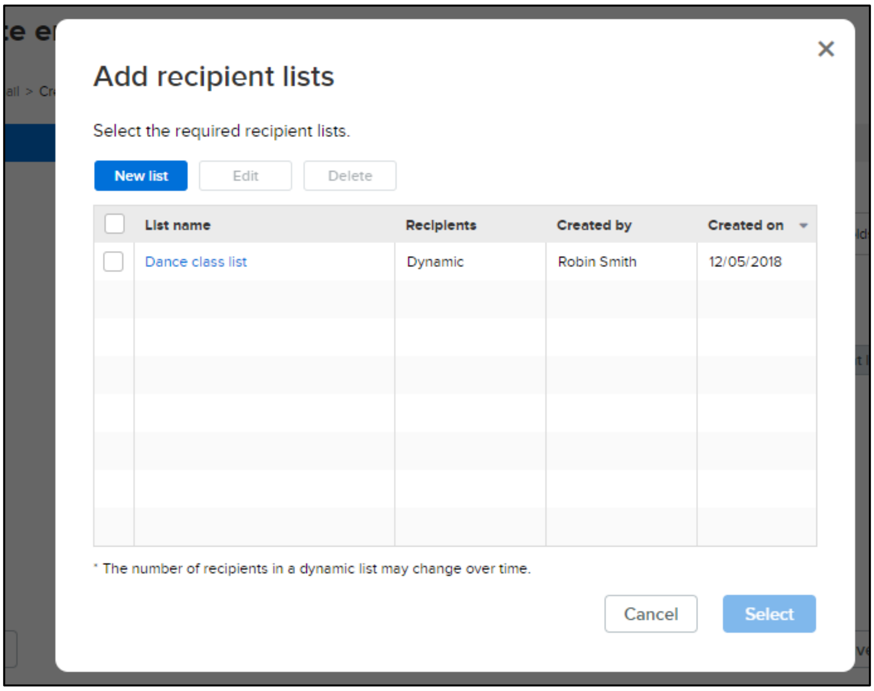
User Interface Improvements

For a better user experience, improvements have been applied to the following communication features:

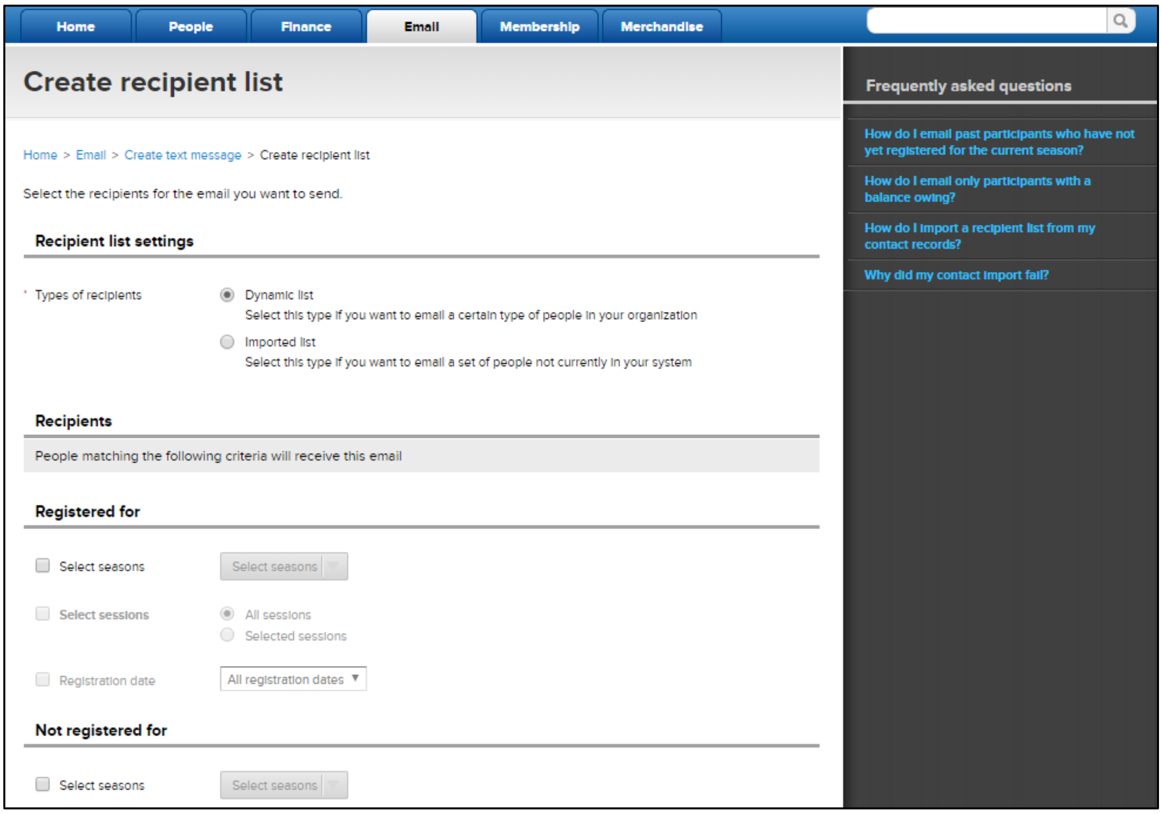
Add recipient lists

A more user-friendly **Add recipient lists** popup now appears when:

- Creating a new broadcast or campaign email (Admin Site > **Email** tab > **New** button > **New email/New campaign** > **Add recipient lists** button)
- Creating a text message (Admin Site > **Email** tab > **Text messaging** section > **Scheduled/Sent/Drafts** link > **New text message blast** button > **Select recipient** button)



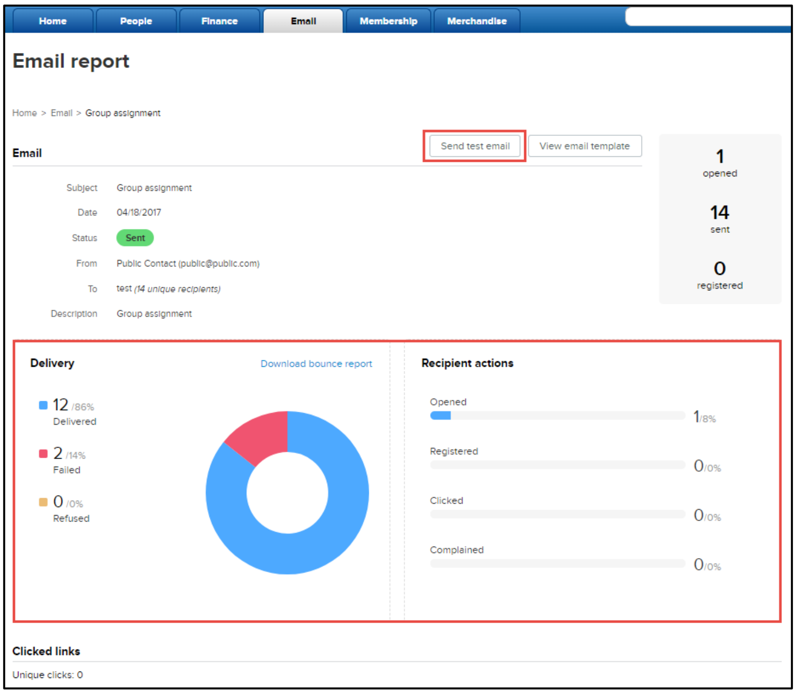
Agency users can select from existing recipient lists or create a new list.



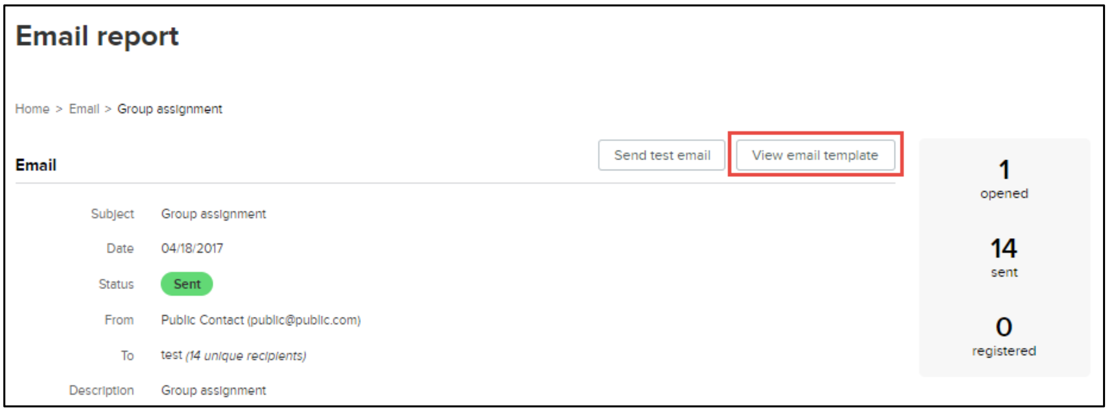
Email report

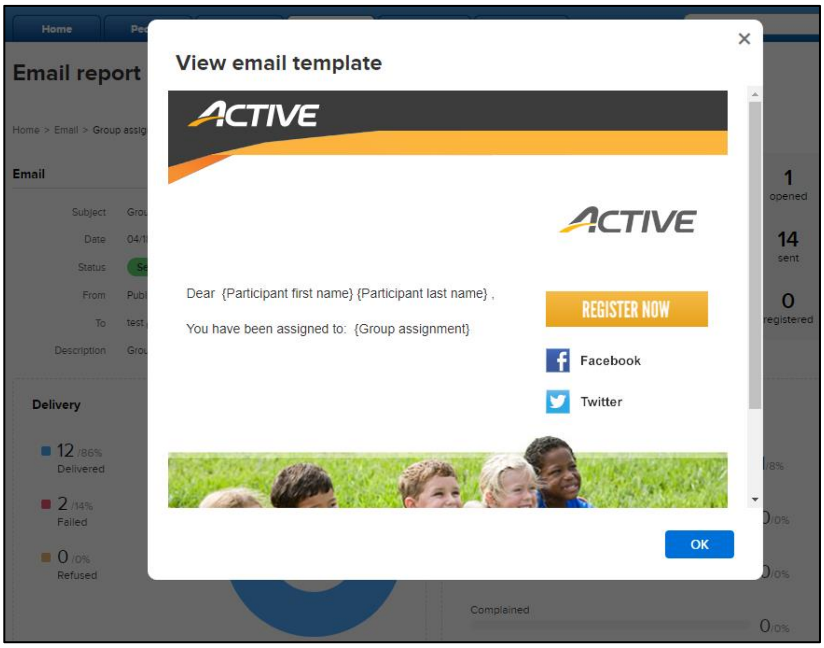
The following improvements have been implemented in the **Email report** (Admin Site > **Email** tab > **Email** section > **Sent** link > a sent email)

- The **Send test email** link is now a button.
- **Delivery** statistics are now displayed as a pie chart.
- **Recipient actions** statistics are now displayed as bar charts.

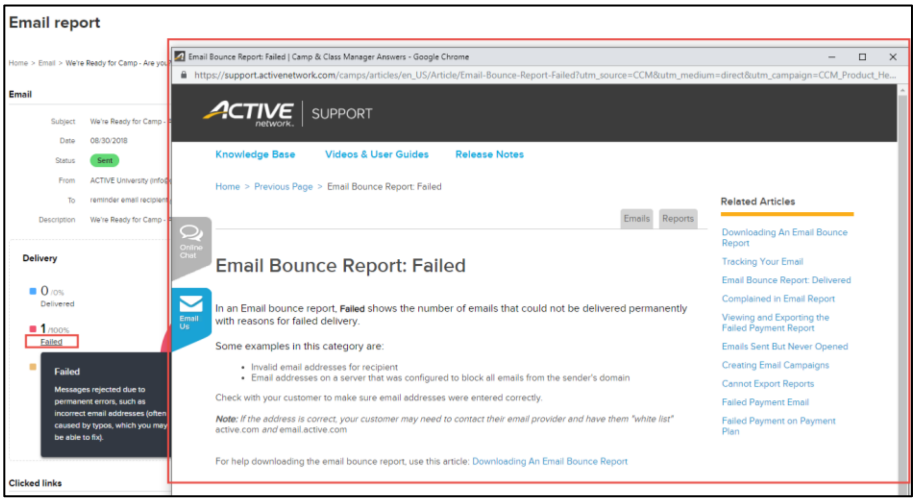


- A **View email template** button has been added for agency users to view the sent email template.





- Under the **Delivery** and **Recipient actions** sections, hovering the cursor over a status label now displays an explanatory tooltip. Clicking the status label link opens the relevant support page.

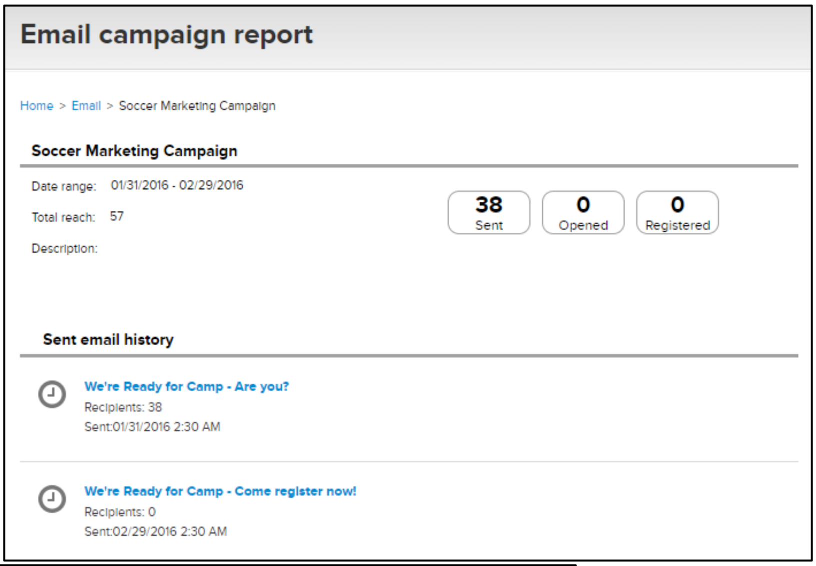


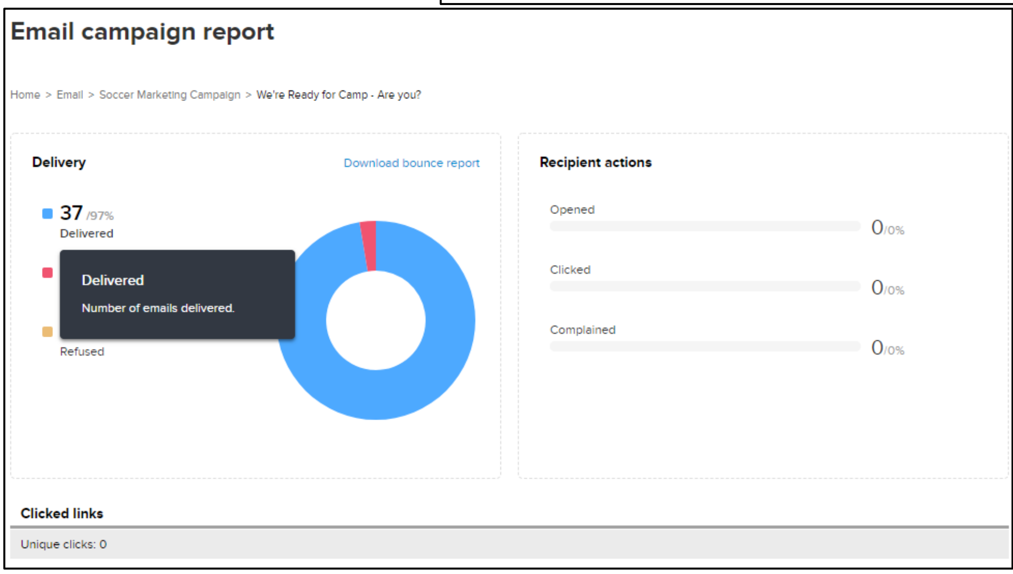
Email campaign report

The **Email campaign report** now has a new appearance (Admin Site > **Email** tab > **Email** section > **Email campaigns** link > check a sent campaign checkbox > **View report** button):

Under the **Sent email history** section, clicking a sent email link opens the detailed report for that email. The following enhancements have been implemented:

- **Delivery** statistics are now displayed as a pie chart.
- **Recipient actions** statistics are now displayed as bar charts.
- Under the **Delivery** and **Recipient actions** sections, hovering the cursor over a status label now displays an explanatory tooltip. Clicking the status label link opens the relevant support page.





Creating an email campaign: Insert merge fields

When creating an email campaign (Admin Site > **Email** tab > **New** button > **New campaign**), the new **Insert merge fields** dropdown list is now available for agency users to insert the following dynamic fields in the subject line:

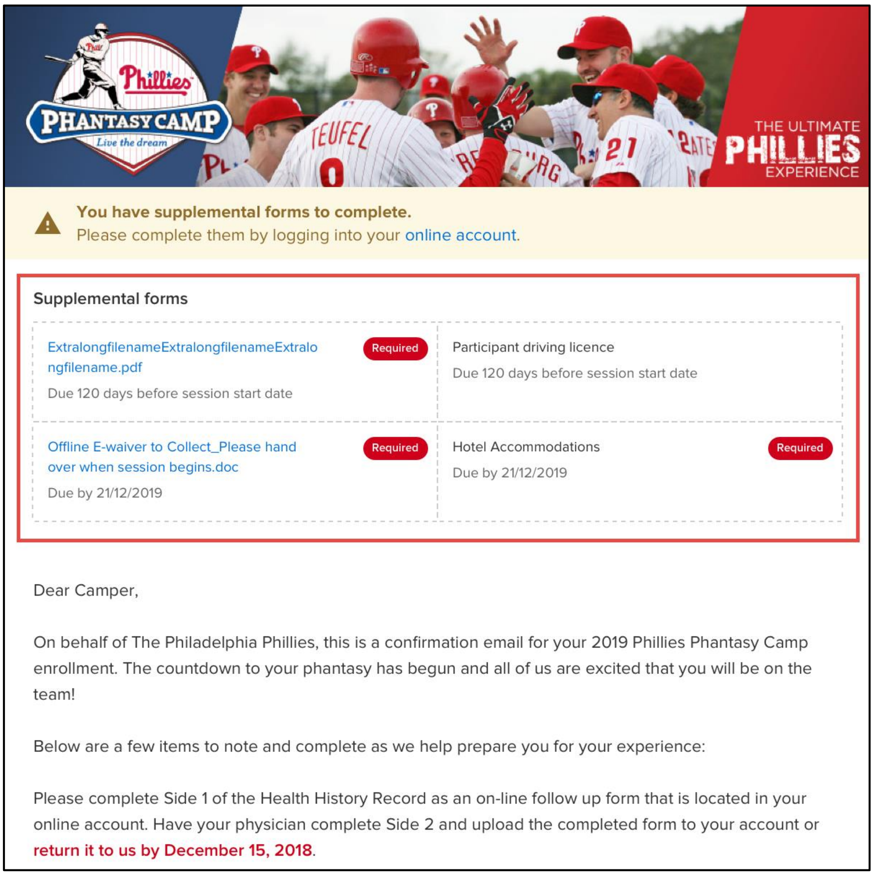
- Family level
  - Primary parent first name
  - Primary parent last name
  - Secondary parent first name
  - Secondary parent last name
  - Family balance
- Participant level
  - Participant first name
  - Participant last name
- Registration level
  - Session name
  - Session type
  - Session location name
  - Session start date
  - Session end date
  - Session start time
  - Session end time
  - Registration balance
  - Group Assignment

Confirmation emails

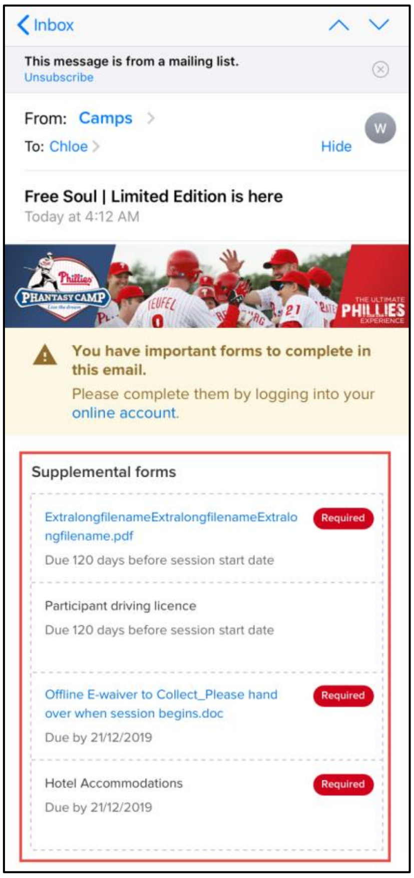
In confirmation emails received by parents or registrants:

- The **Supplemental forms** section has been moved up to a more prominent location for recipients to see:

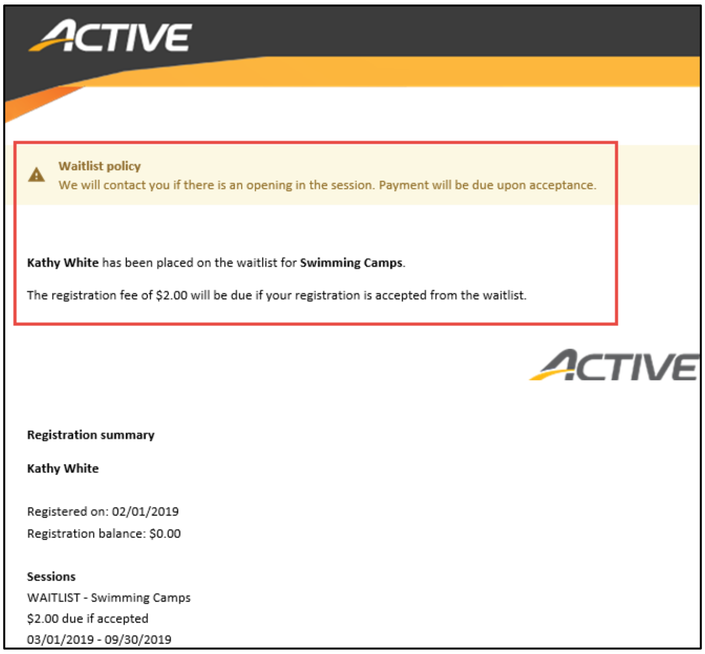
<u>Desktop</u>



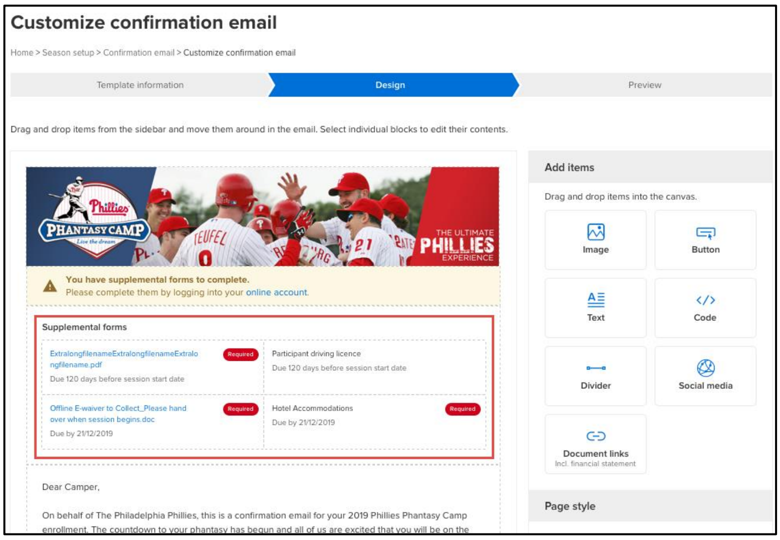
<u>Mobile</u>



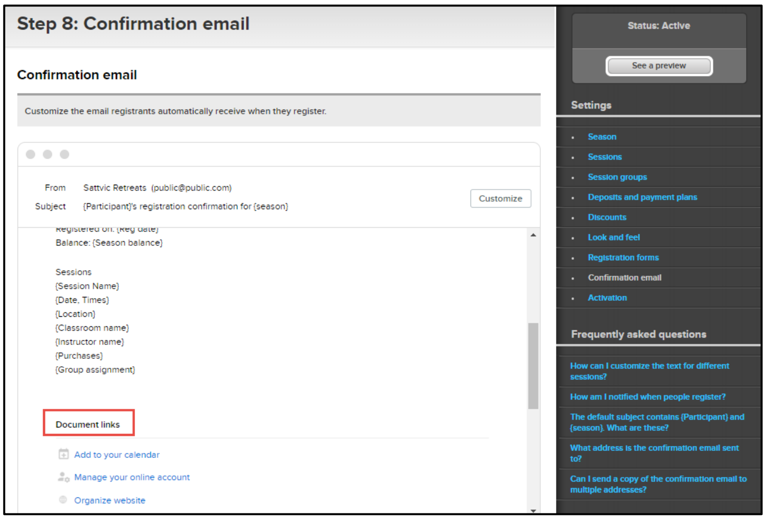
- If some or all sessions purchased in a registration are waitlisted, then a waitlist message is displayed (if all purchased sessions are waitlisted, then the balance due for the registration is also displayed):



The above enhancements also apply when agency users edit the confirmation email template by clicking the Admin Site > **Home** tab > a season > **Setup** > **Settings** > **Confirmation email** > **Confirmation email** section > **Customize** button.



In addition, in the confirmation email, the section heading “**Important links**” has been changed to “**Document links**”:



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