



# Email Management

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User Guide for JustGo

# What's inside?

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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.

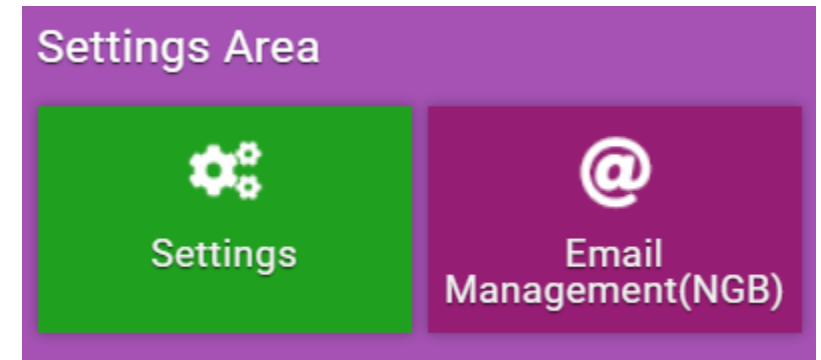
Some screenshots and info in this guide may differ depending on subscription type.

# 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.



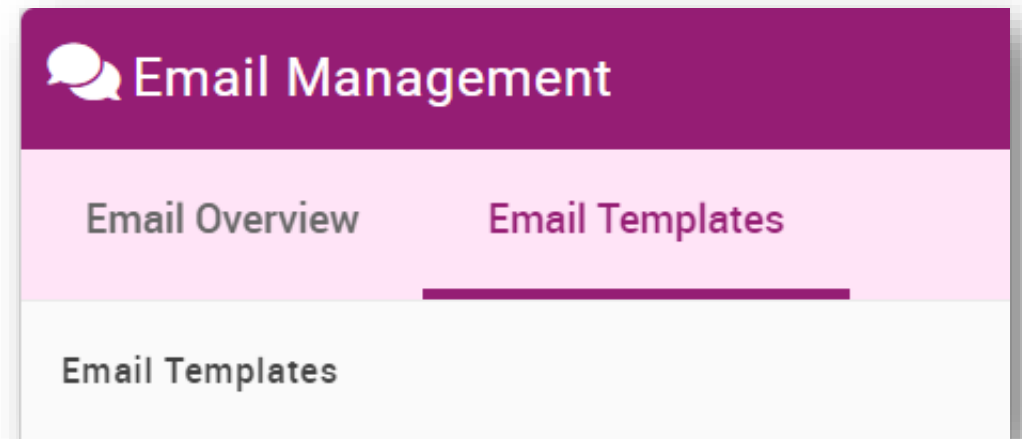
# What are Email Templates?

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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.



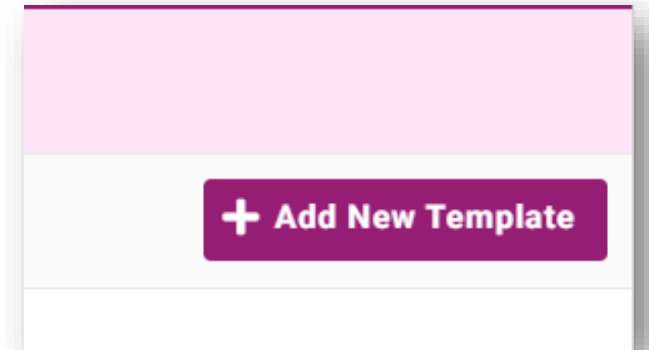
# How do I create a new template?

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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 is white with a light gray border and a drop shadow. It contains five input fields, each with a label to its left and a small asterisk to its right. The fields are: "Name:", "Description:", "Organisation Name:", "Organisation Email:", and "JustGo URL:".

Name:	<input type="text"/>	*
Description:	<input type="text"/>	
Organisation Name:	<input type="text"/>	*
Organisation Email:	<input type="text"/>	
JustGo URL:	<input type="text"/>	

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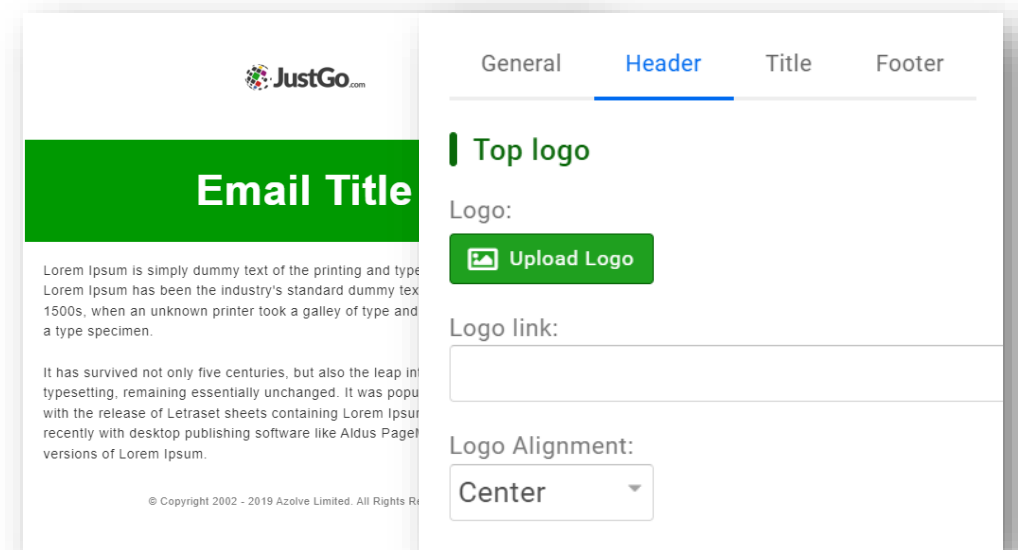
# How do I create a new template?



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?

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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.



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# How do I create a new template?

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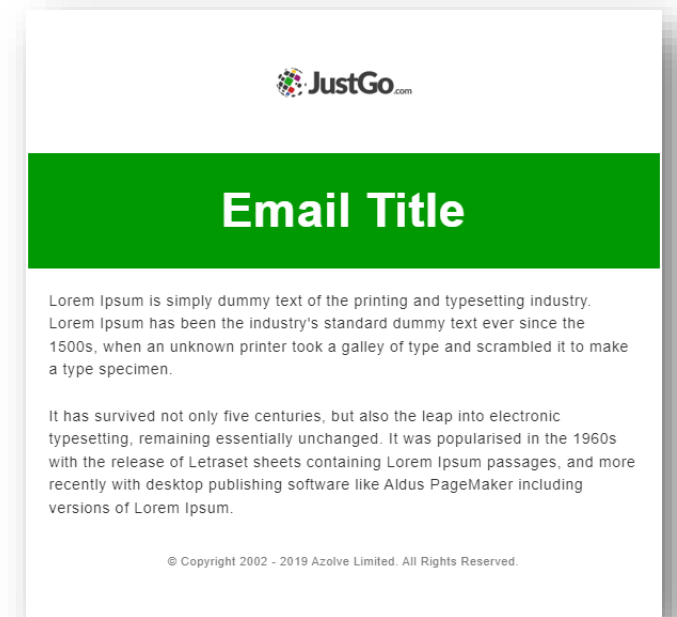


**Signatures:** This changes the default signature of the template and can be left blank.

**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.



# 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.

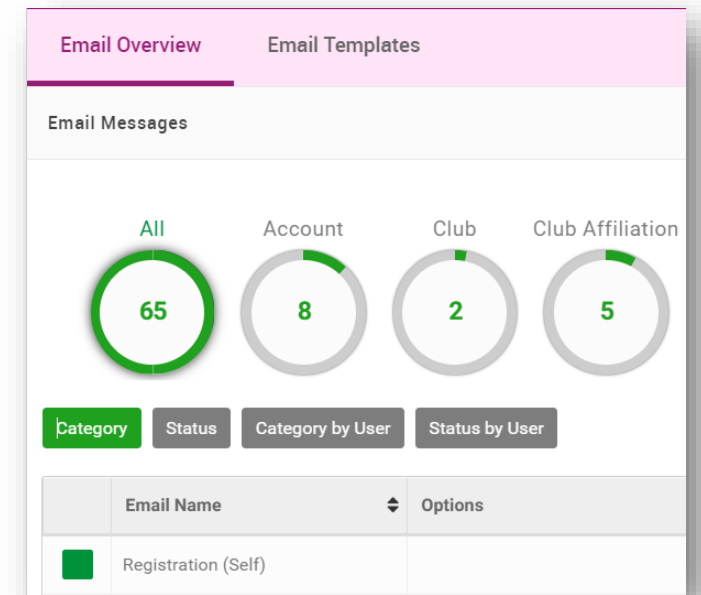
Name	Actions
Default email	 
Mainul's Template	  

# 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.

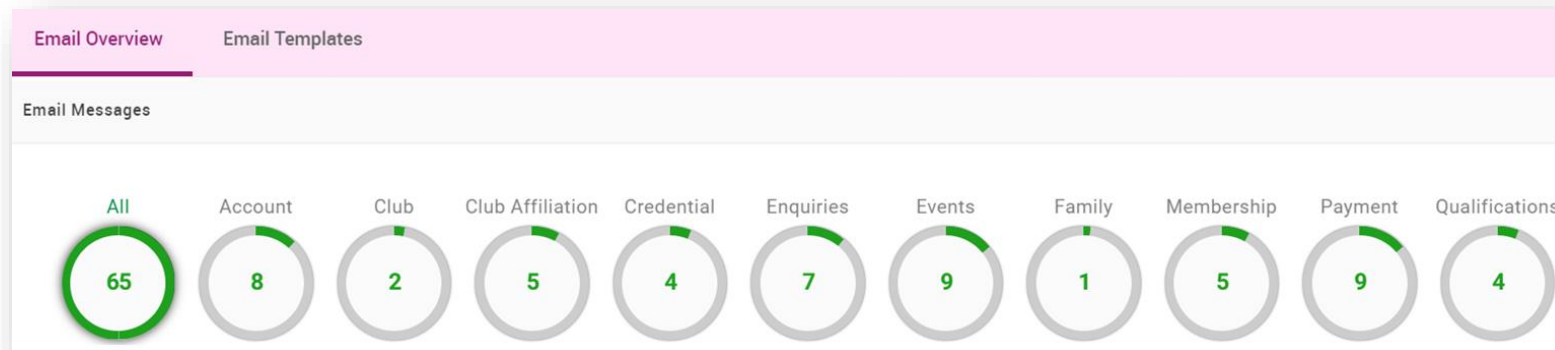


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# What is Email Overview?

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.

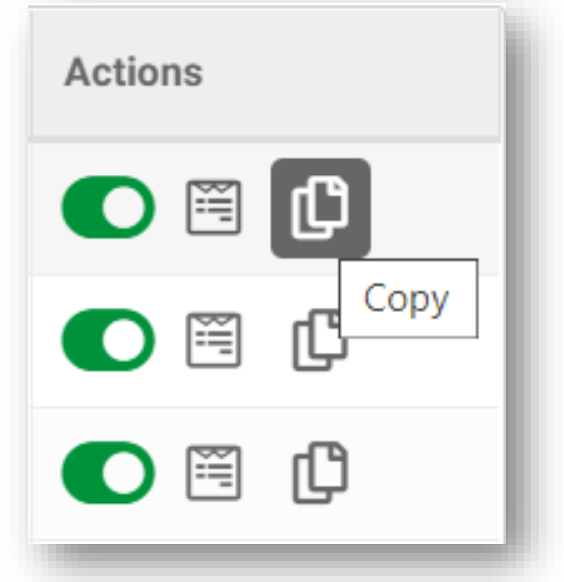
If you want your own specific wording you will need to make a copy of the default and then be sure to switch off the default and switch on your copy.

	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.

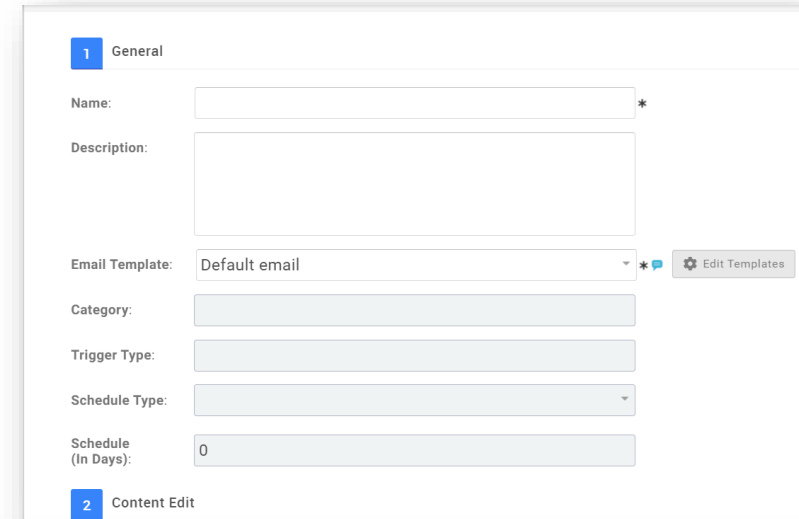


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# How do I customise an automated email?

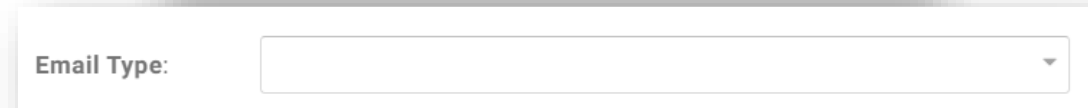
Upon clicking the Copy button, a draft copy will be created.

**Note:** For On purchase 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' configuration tab for an automated email. It includes the following fields and options:

- Name:** A text input field with an asterisk indicating it is required.
- Description:** A larger text area for providing details about the email.
- Email Template:** A dropdown menu currently set to 'Default email', with an 'Edit Templates' button to its right.
- Category:** A dropdown menu.
- Trigger Type:** A dropdown menu.
- Schedule Type:** A dropdown menu.
- Schedule (In Days):** A text input field with the value '0'.



The screenshot shows the 'Content Edit' tab, which features a single dropdown menu labeled 'Email Type'.

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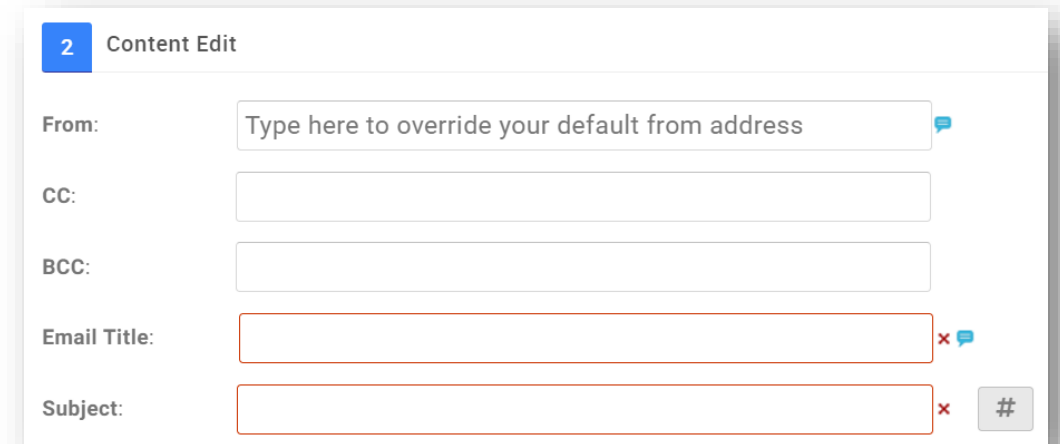
# How do I customise an automated email?

**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 a 'Content Edit' form with the following fields:

- From:** A text input field with the placeholder text 'Type here to override your default from address' and a blue speech bubble icon on the right.
- 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 on the right.
- Subject:** An empty text input field with a red border, a red 'x' icon, and a grey '#' icon on the right.

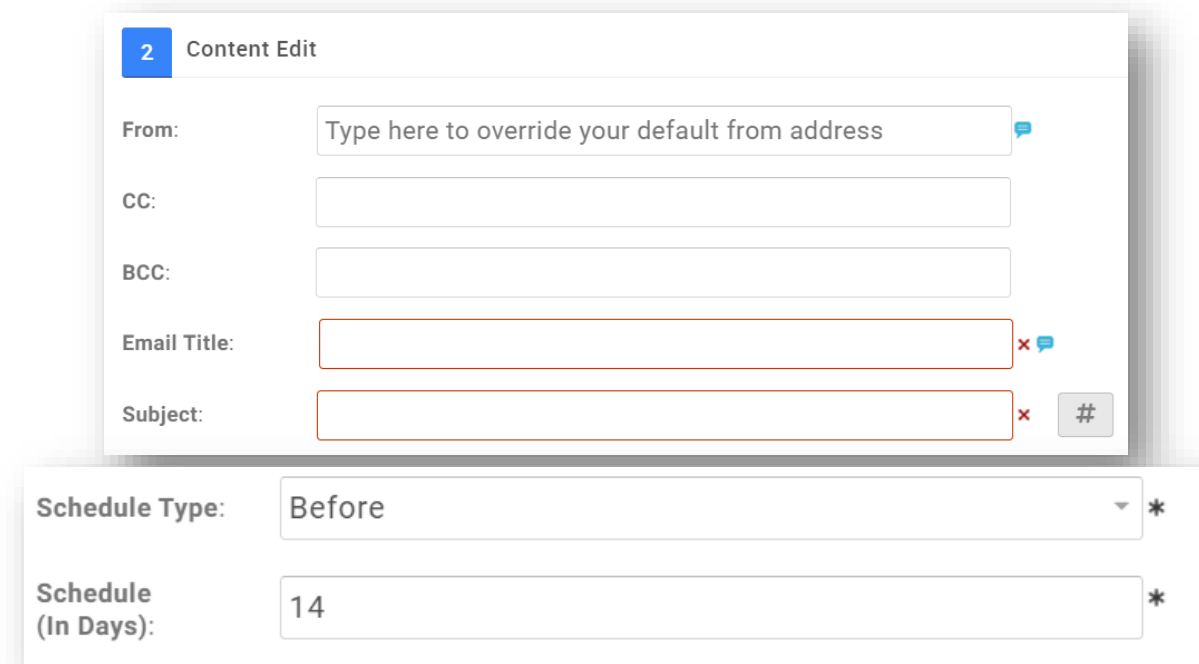
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# How do I customise an automated email?

**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:

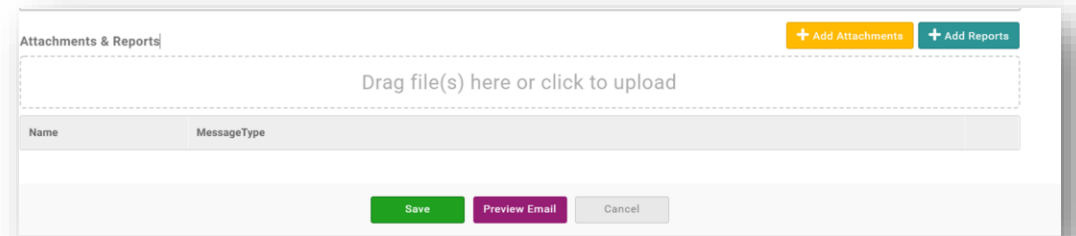
Schedule (In Days):

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# How do I customise an automated email?

The draft can be previewed before saving to make sure the email is right.

















Please make sure to save the draft before exiting.



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# How do I customise an automated email?

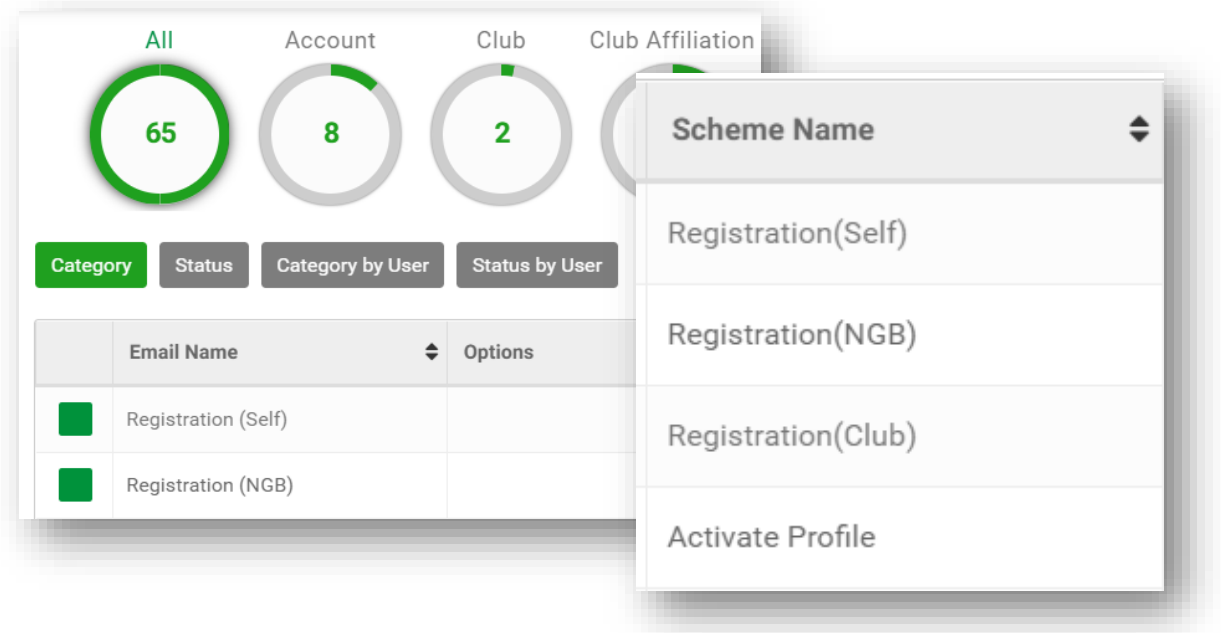
After saving, the new email will be located at the bottom of the list in the email overview

	Registration (NGB)		#OrganisationName membershi...	Registration(NGB)	Default email	  
	Registration(Club)		#OrganisationName membershi...	Registration(Club)	Default email	  
	Activate Profile		#OrganisationName account act...	Activate Profile	Default email	  
	Registration(Upload)		Registration(Upload)	Registration(Upload)	Default email	  

# How do I identify which custom email replaces which system email?

To identify which customised emails replace which system emails, first sort as Category.

Then match the fields from the Scheme Name.



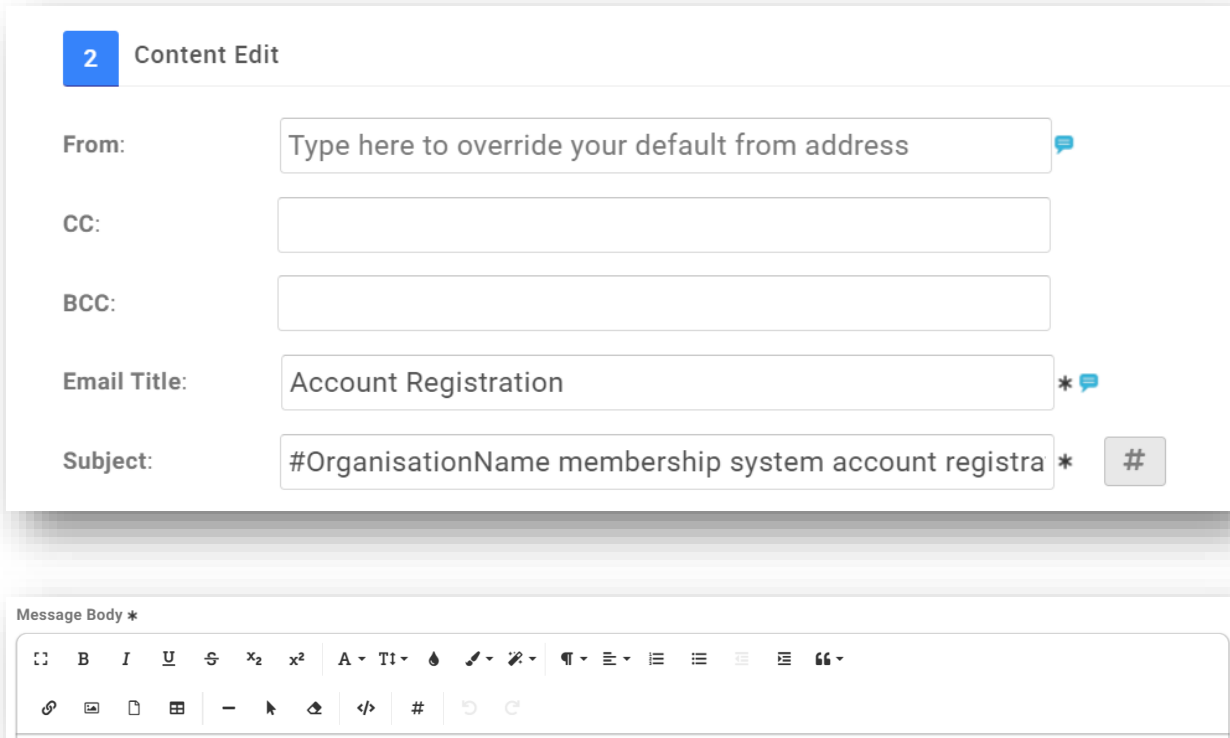
	Email Name	Options
■	Registration (Self)	
■	Registration (NGB)	

**Scheme Name**

- Registration(Self)
- Registration(NGB)
- Registration(Club)
- Activate Profile

# 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 includes fields for "From:", "CC:", "BCC:", "Email Title:", and "Subject:". The "Email Title" field contains "Account Registration". The "Subject" field contains "#OrganisationName membership system account registra" and has a small grey button with a hash symbol (#) to its right. Below the subject field is a "Message Body \*" section with a rich text editor toolbar containing icons for bold, italic, underline, link, unlink, list, and other text formatting options.