

Office - Classic Editor

2017 Fall Edition

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Overview

The **Editor** tool appears in the Marketing Template portion of CMA. It can be utilized when **creating marketing templates**. The editor has many functions similar to those found in Microsoft Word in addition to custom features of the CMA. The user can ‘mouse over’ the icons to see its function. This guide will specifically take a look at the most commonly used functions of the editor.

Please Note: Only clients still utilizing CSWeb will use this editor. New clients will use the improved, Hosted Editor.

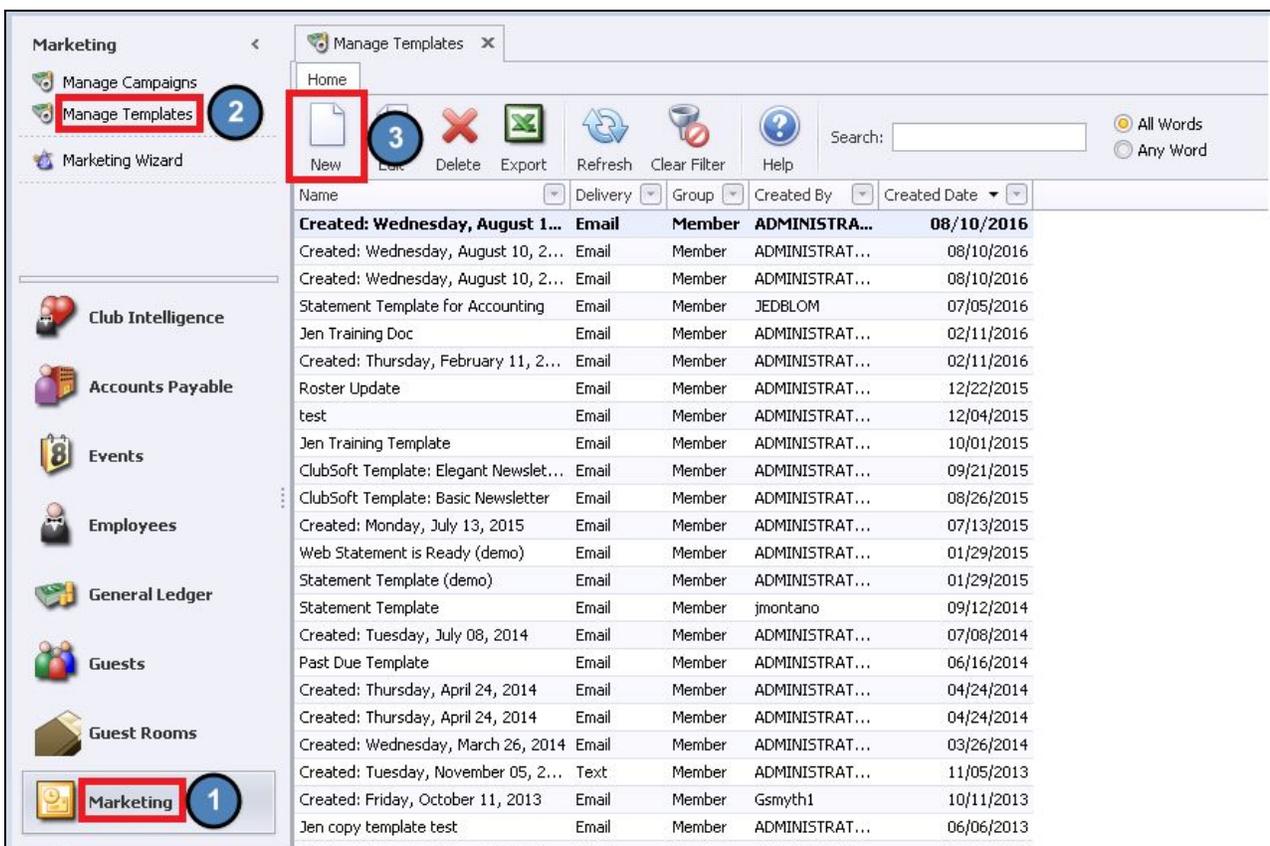
Use Case(s):

- As a Club Admin you would like to add stylized content but are unsure of how to use the multitude of features within the Classic Editor.

Accessing the Tool

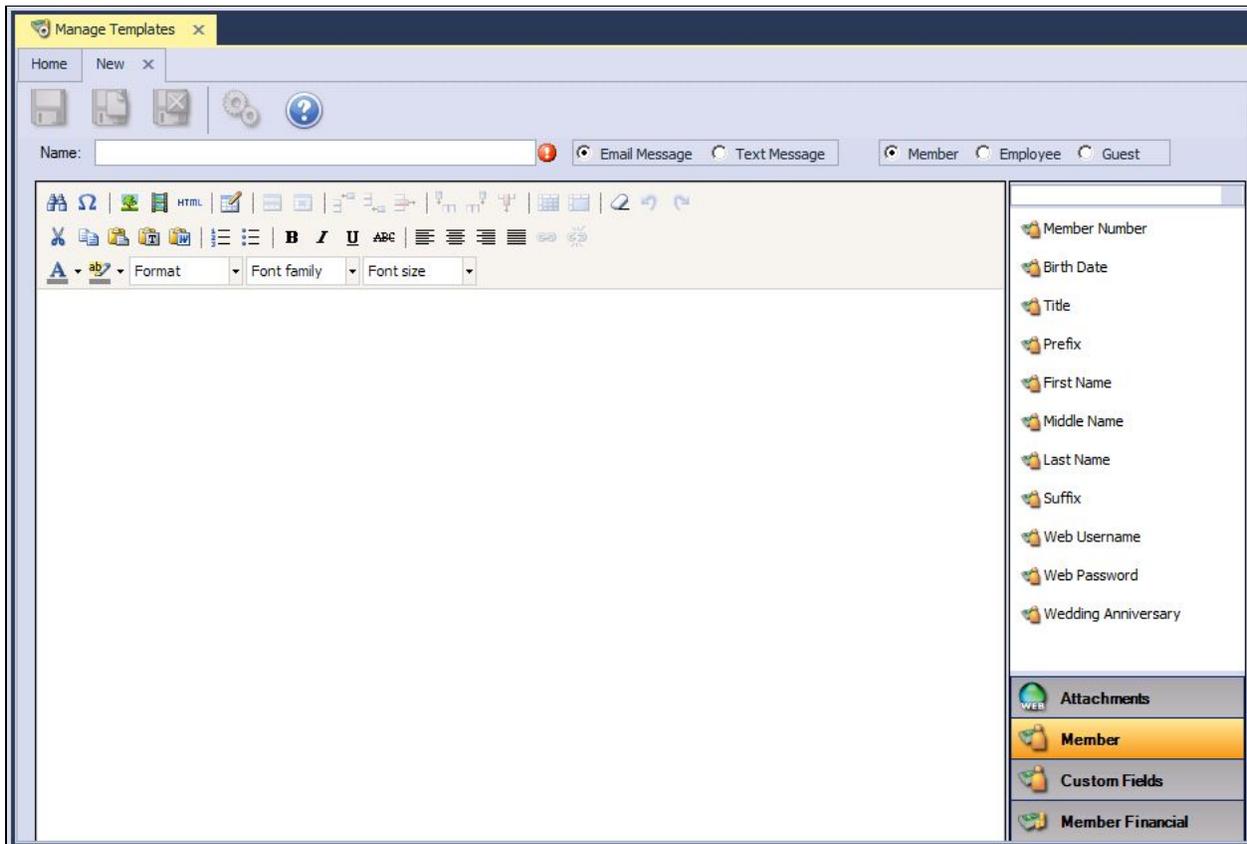
To access the **Classic Editor**:

1. Select **Marketing** Module, then **Manage Templates**, and **New**.



2. Clicking the **New** icon or double clicking on the **name** of an existing template will open the editor. This is what the editor should look like.

Please Note: *If your editor does not look like this, please notify Clubessential so we can update your editor to the most recent version.*



Basic Icons

Save Icons

Save

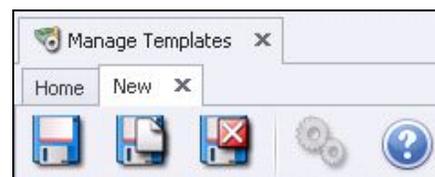
Saves your changes

Save and New

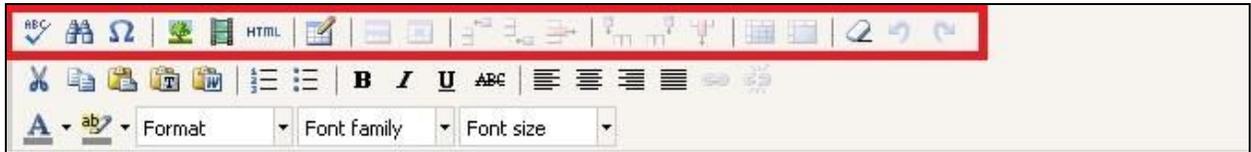
Saves and opens a new template/editor

Save and Close

Saves and closes editor/template



First Row of Icons

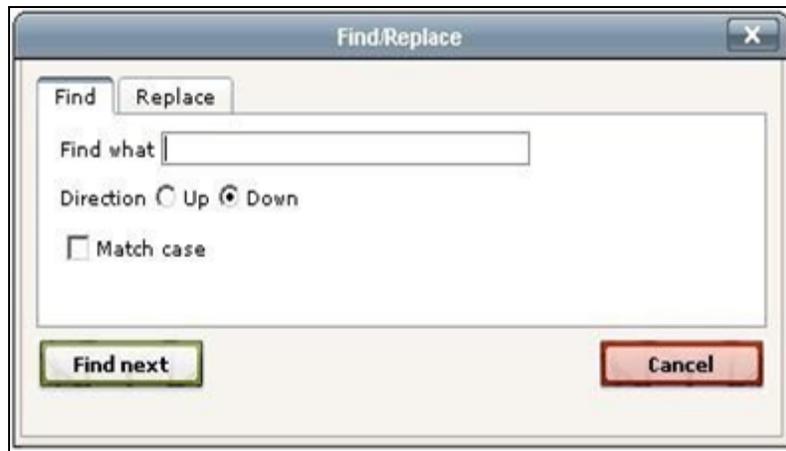


Spell Check

There is not a built in spell check; however, by clicking on the Spell Check icon a download for “iespell” will start. This is the spell checking tool through Internet Explorer.

Find and Replace

Allows for search and replace for words within the editor.



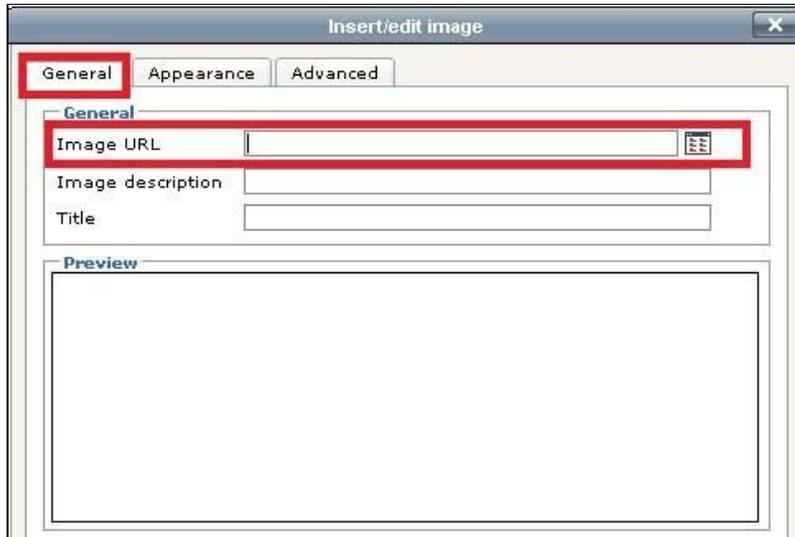
Select Custom Character

Inserts custom characters into the editor.



Insert/Edit Image

This allows you to browse images in the image library or upload new images to the server to use in the editor.



- On the **General** tab, Click the **browse** button to the right of the Image URL field to open the image manager.

In the **Image Manager**, you can create new folders, search for existing images, or upload new images by clicking on the appropriate icon(s).

Please Note: To keep images organized, it is best to create a folder and then click on that folder before uploading new images. Otherwise, the images will be uploaded to the general area of the image manager.



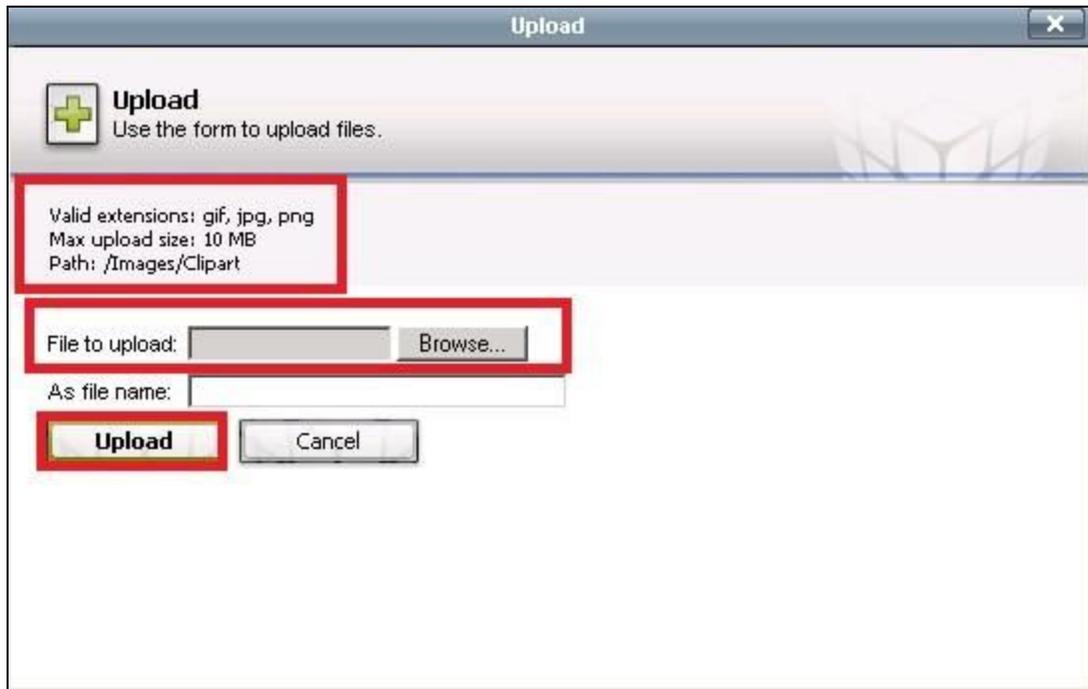
To **Create a Folder** within the Image Manager:

1. Click **Create Folder**.
2. A pop up box will appear, leave the **Template** as the default '**Select template**' setting.
3. Assign a **Folder Name**.
4. Leave **Create In** as the default setting of **/Images**.
5. Click the **Create** button.



Under **folders** the new folder will appear.

1. Click **folder name** to upload images into the selected folder.
2. Click the **Upload Icon** to browse your computer for new images.



Please Note: Valid File Extensions are gif, jpg, png, and the max file size is 10MB. Please keep in mind that 1MB should be fine for web use. **1MB=600x800 pixels.**

Path

This will show you the location/folder where the image is uploaded.

File to Upload

Click **browse** and select your file from your computer.

As File Name

This setting allows you to rename the file.

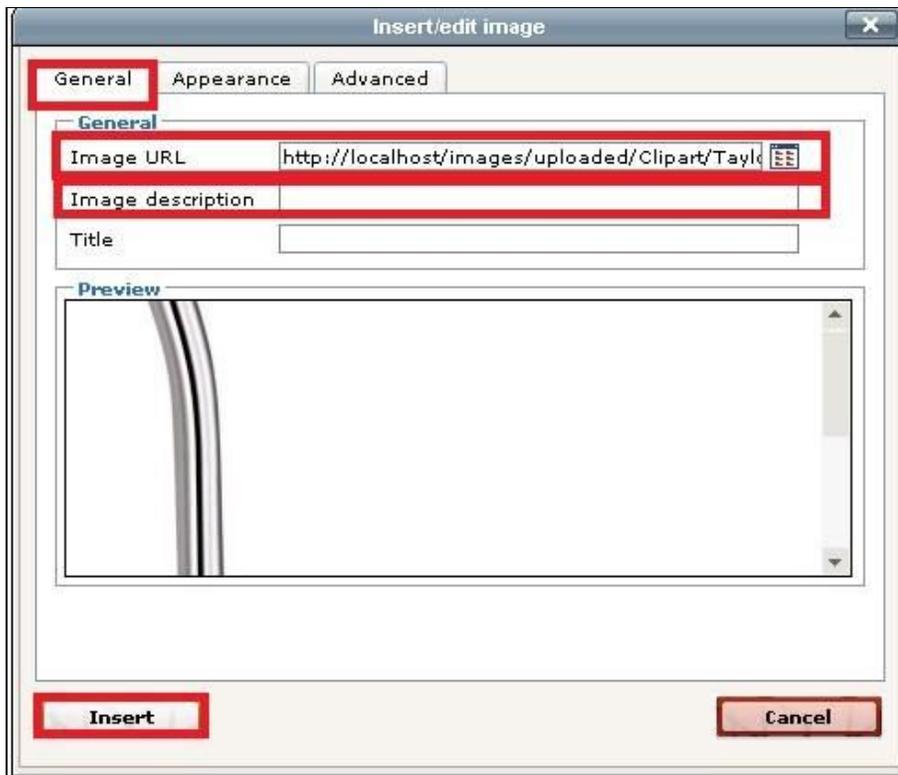
Upload

1. System will say “upload successful”, then continue to upload more images or close out of the pop up box if you are finished.
2. Image will display in folder/gallery.
3. Click the up arrow next to the filename for options such as **Insert, Delete, Edit, View, Download, Add to Favorites.**



Click Insert to add the image to the editor:

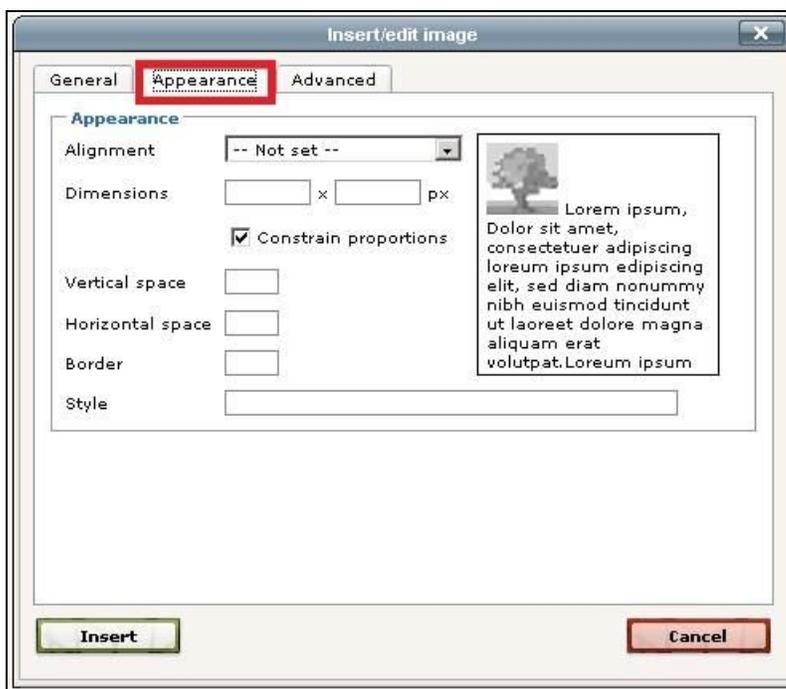
1. A new window will appear defaulting to the **General Tab**.
2. The Image URL field will be automatically populated with the file path to the image.
3. **Image description** is optional; however if you do NOT enter a description, a warning will pop up that the image does not have a description when you insert the image. If this happens, click 'ok'.
4. The **Title** is optional as well, if a title is entered, the title will display when the mouse is on top of the image.
 - **Click Insert** to add the image to the editor **OR** click the **Appearance tab** for further formatting options.



Appearance Tab

Provides formatting options such as alignment, size dimensions, **Vertical/horizontal spacing, border and style**. Set the image alignment so it appears right, left, top, bottom or center to the text. Resize the image using the dimension boxes.

To set a specific dimension, uncheck **constrain proportions** box. For Vertical/Horizontal Space enter a 5-10 in this box so that there is spacing between the image and the text. Enter a number such as 1-10 for the border size, color is not an option here.



Advanced Tab

Do not use; this is for advanced developers.

Click **Insert** to add the image once you have selected the image and set formatting.

Image will appear in editor. **To edit the image, hold mouse over image and right click** a pop up box will appear allowing for adjustments to the image.

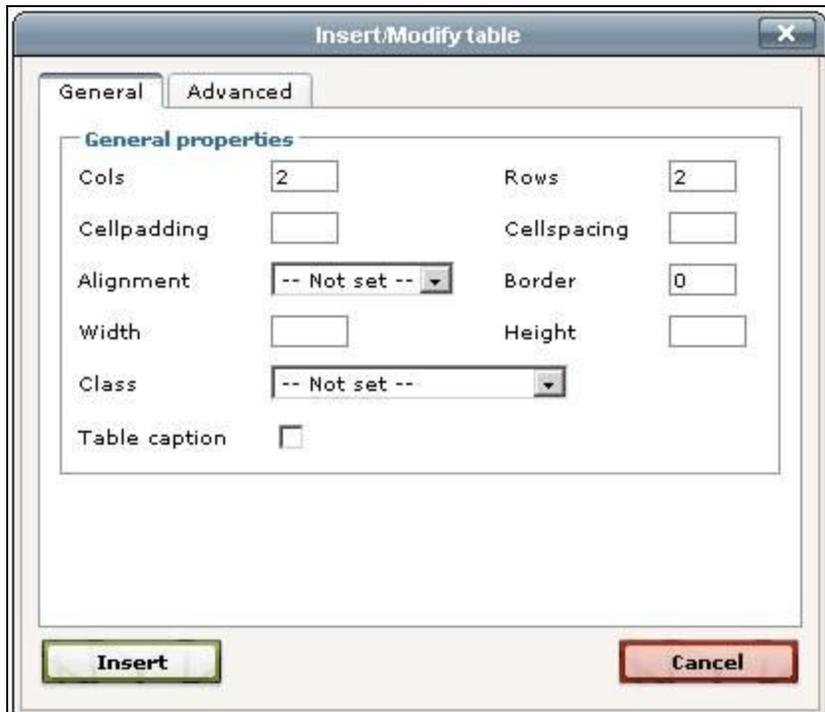
HTML

View the HTML code vs. the visual editor view. This is for experienced administrators

Table-Insert/Modify a table

Tables are useful to organize and format information.

General tab allows you to set the **General table properties** as seen below.

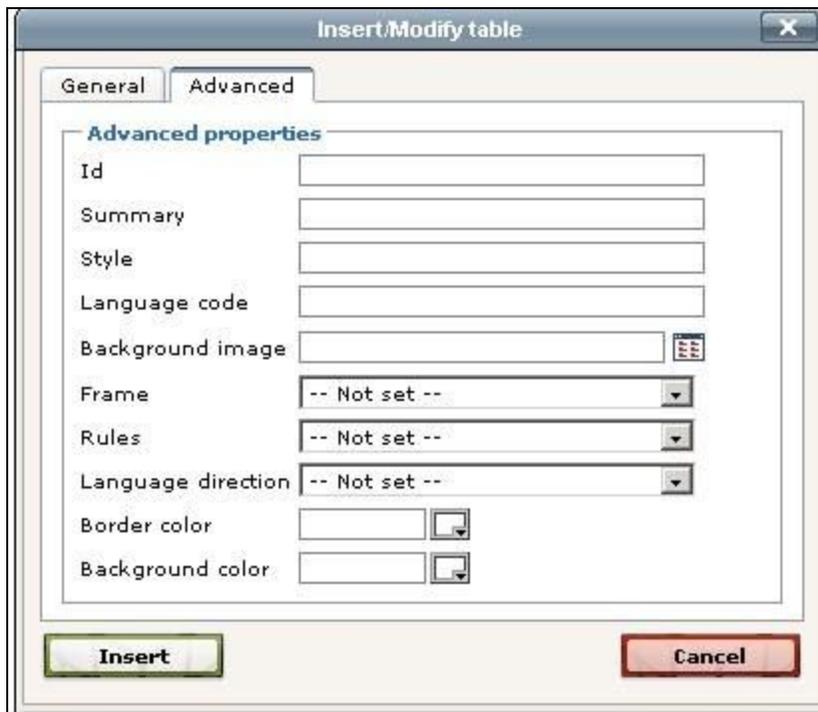


The screenshot shows a dialog box titled "Insert/Modify table" with a close button (X) in the top right corner. It has two tabs: "General" (selected) and "Advanced". The "General properties" section contains the following fields:

Cols	<input type="text" value="2"/>	Rows	<input type="text" value="2"/>
Cellpadding	<input type="text"/>	Cellspacing	<input type="text"/>
Alignment	<input type="text" value="-- Not set --"/>	Border	<input type="text" value="0"/>
Width	<input type="text"/>	Height	<input type="text"/>
Class	<input type="text" value="-- Not set --"/>		
Table caption	<input type="checkbox"/>		

At the bottom of the dialog, there are two buttons: "Insert" (green border) and "Cancel" (red border).

The **Advanced Tab** allows you to set additional table properties such as **background** and **border color**.



Click **Insert** once the table properties are set and the table will appear in the editor

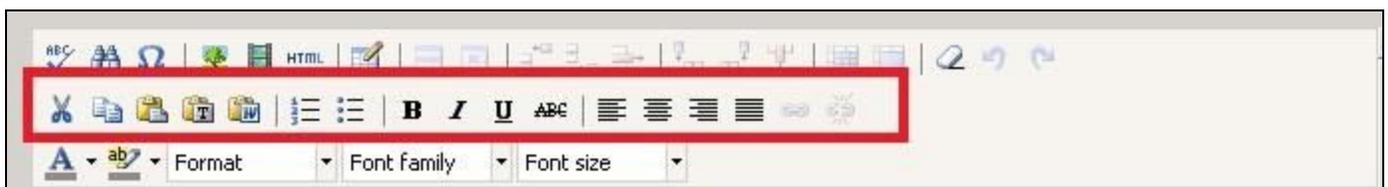
Additional table icons allow you to easily add/remove rows and columns or merge cells once a table has been created

Remove Formatting

Highlight text and click this icon to remove all formatting. This option is good to use when copy/pasting from another source into the editor. Once the formatting is cleared, you can set the new formatting.

Undo/Redo buttons

Second row of Icons



Cut-remove text or images

Copy

Paste

Paste as Plain Text

Paste text, removing all formatting. Recommended paste option

Paste from Word

Paste text from a Word document

Order List

Format list with numbering or lettering options

Unordered List

Format list with bullets or symbols

Bold Text

Indent Text

Underline Text

Strikethrough

Left, Center, Right, Full Alignment

Hyperlink and Break Hyperlink

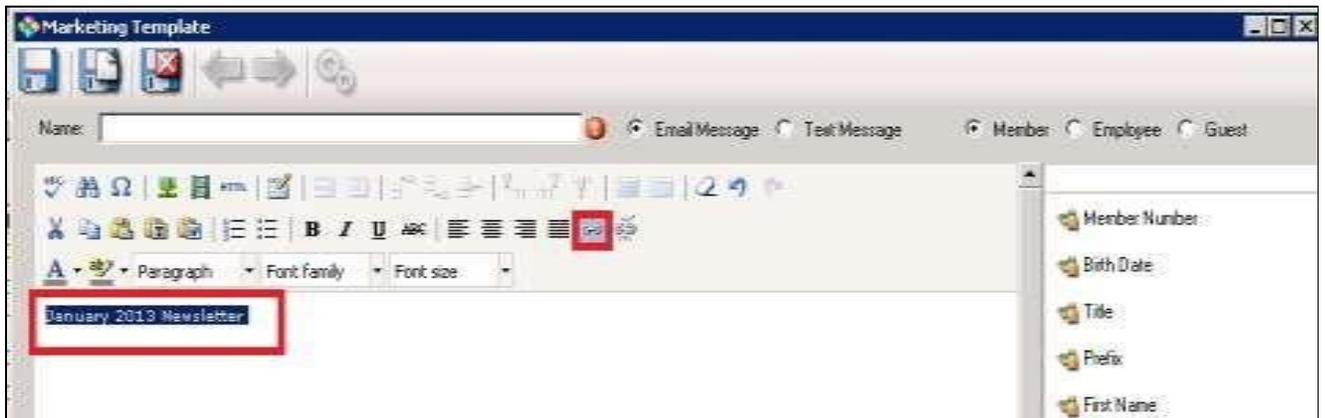
The Hyperlink Icon is used to create a link to a document such as a PDF of a newsletter, video files, or other types of documents.

To create a **hyperlink**:

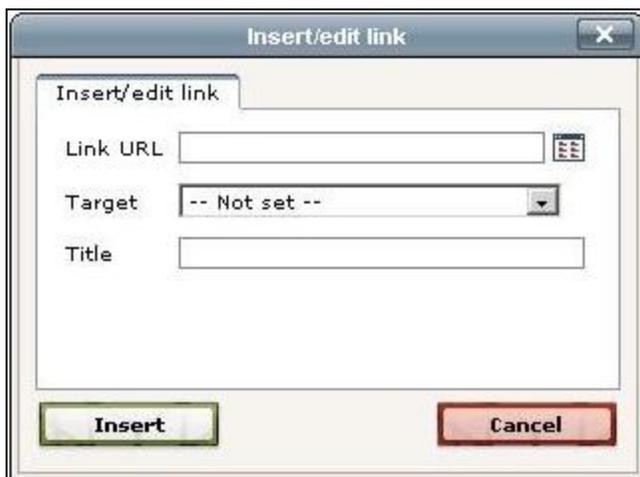
1. First type the text that will be the link.

Please Note: Until the text is in the editor and highlighted, the hyperlink icon will remain greyed out.

2. Type text such as “January 2013 Newsletter” in the body of the editor and click the **hyperlink icon**.



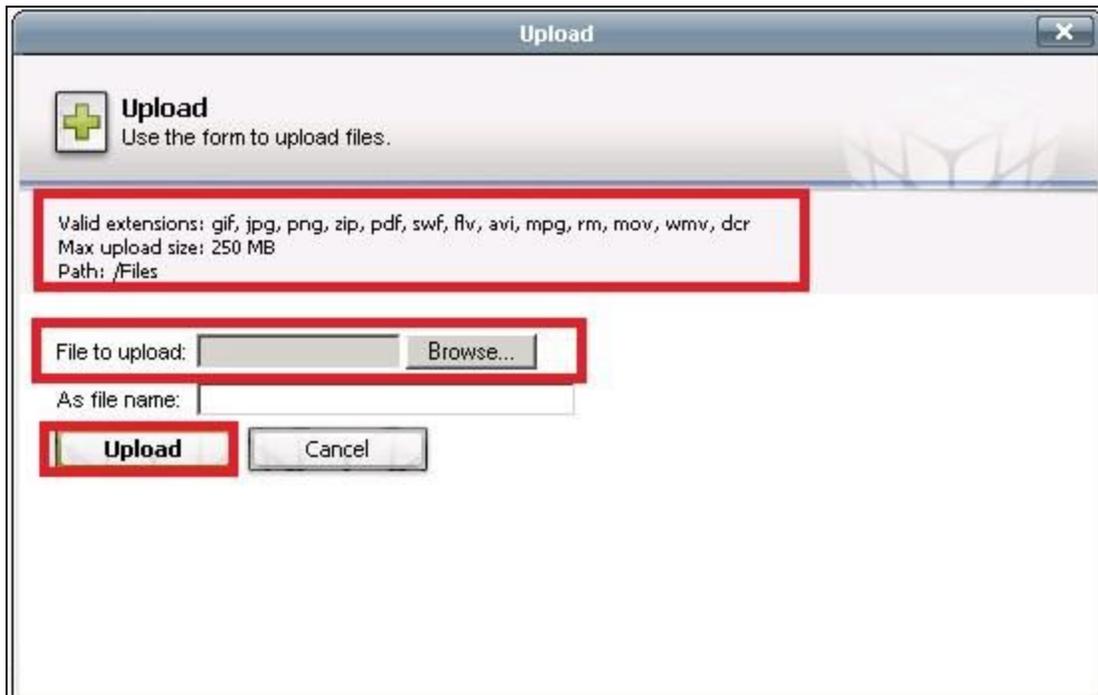
3. Click the **browse** button in the Insert/Edit Link menu.



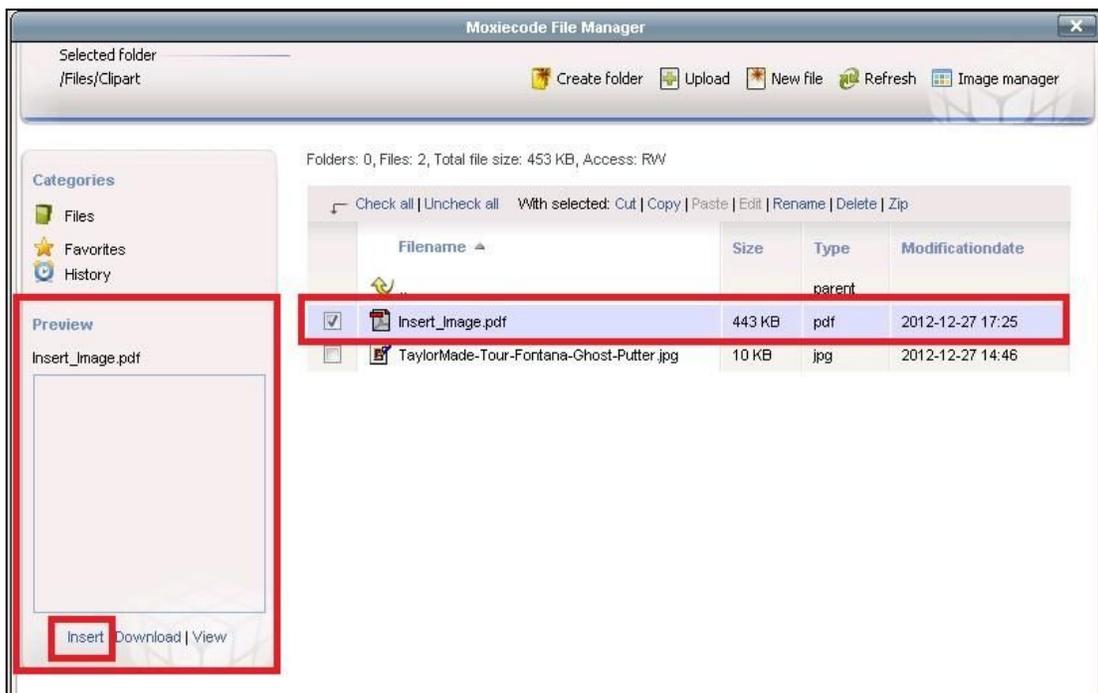
4. Click the **Browse button** to locate the file on your computer.

5. **As File Name:** Option to name the file something other than the original file name.

6. Click **Upload**.



7. Once complete, click the “x” to close the upload box and return to the **file manager**.
8. Select file by placing a **checkmark** by the file name in the preview, and click **insert**.

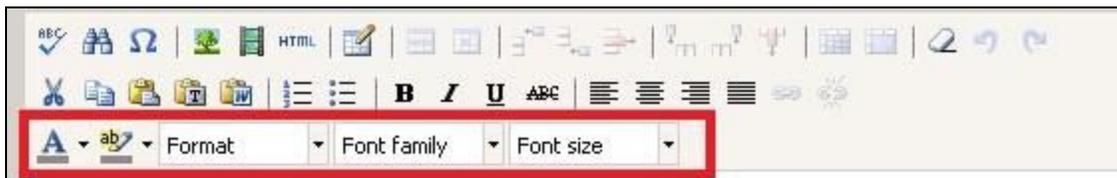


9. **Insert/Edit** box will appear. The **Link URL** will be populated with the file.

10. Then set the **Target** to either open in a new window or the same window.
11. Enter the **Title** of the document.
12. Click **Insert**. The text is now a **hyperlink** to the document.



Third Row of Icons



Select Text Color

Choose a font color for your text using this option

Select Background Color

Select a color to go behind your text

Format

Use preset formatting options for paragraphs, headers, etc..

Font Family

Select text font. Each club's system has a default font, it is usually best to use the default font when creating emails for consistency

Font Size

Select size of text font. The Font size is in points.

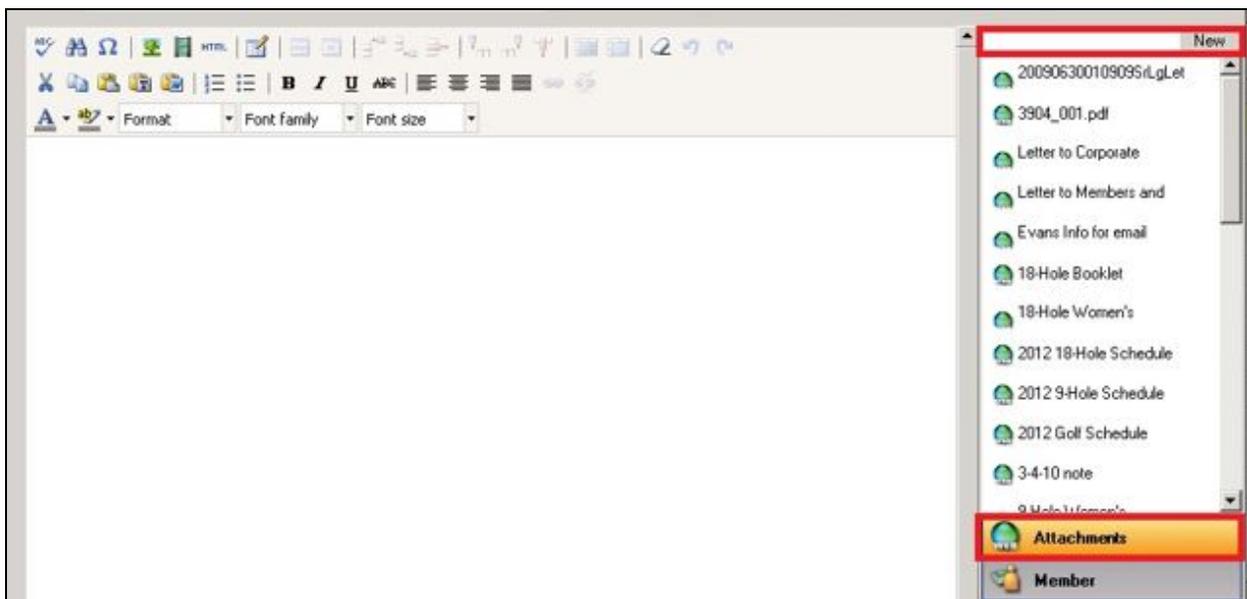
Custom Plug-Ins

Please Note: This option is available **ONLY** in the **Marketing Editor Template**.

Use these custom plug-in options to customize/personalize the email template. Options include Attachments, Member, Custom Fields, Member Financial, System, Web Custom Page and Web Module. Click the plug-in option on the right side of the editor for detailed options.

Attachments

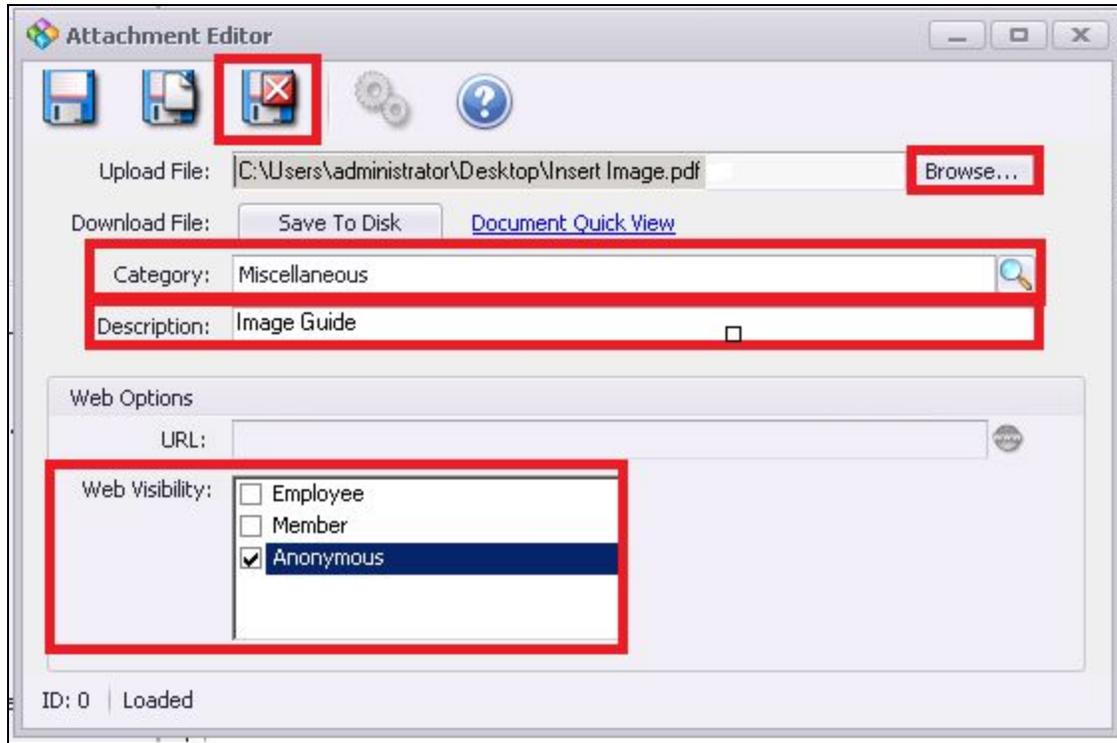
This is one option to upload and attach documents into the email template. Using this feature will display the attachment file name exactly as the filename is when uploaded. If you wish to customize the attachment file name, use the hyperlink function instead. Clicking the **Attachment button** will display all attachments currently uploaded the click the **attachment name** to insert into document.



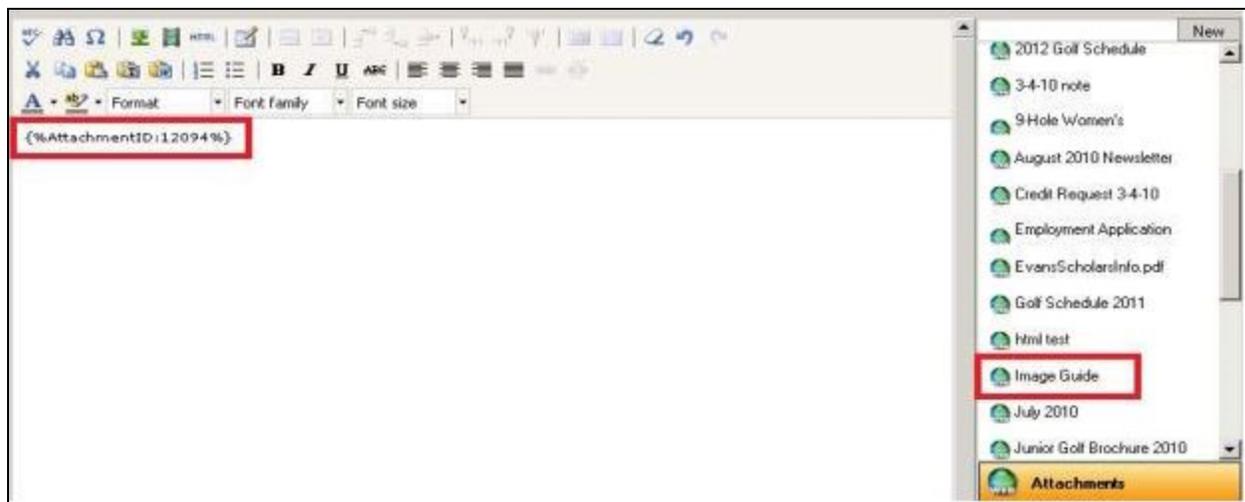
To upload a new attachment:

1. Click the **New button** the top right corner, then **browse** your computer for the file you wish to upload.
2. Select a **category** by clicking the looking glass.
3. Enter a **Description** of the file (optional).
4. Set **Web Visibility Settings**. 'Anonymous' will allow the member to open the attachment without logging into the website.
5. **Save and Close**

Please Note: **Download File** allows you to download the file onto a disk and the **Document Quick View** allows you to preview the document.

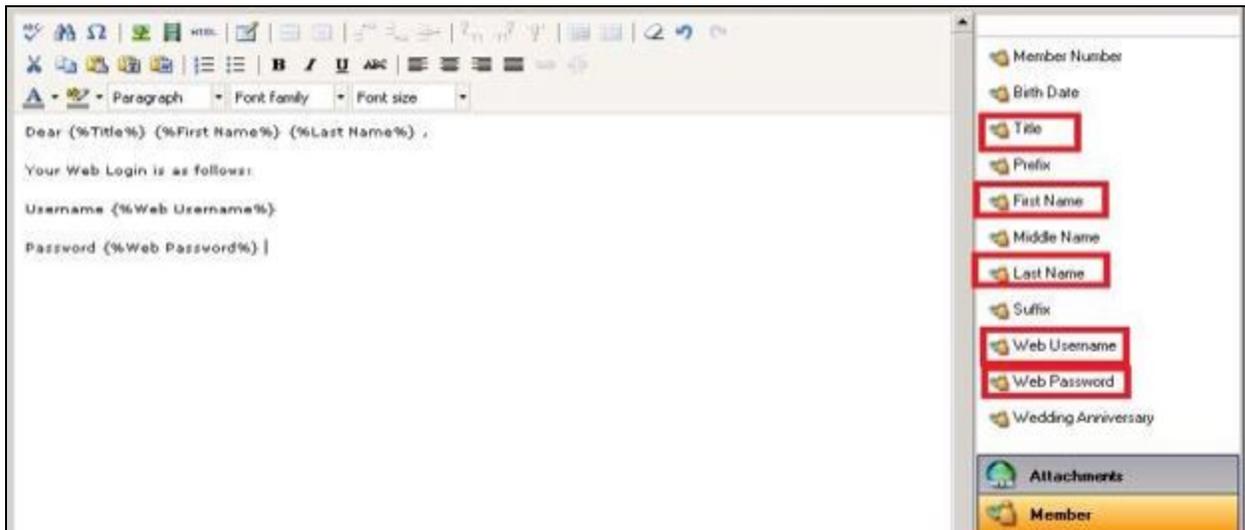


Once the new file is uploaded, it will appear in the list of attachments. Click the **file name** to insert into the editor as seen below.



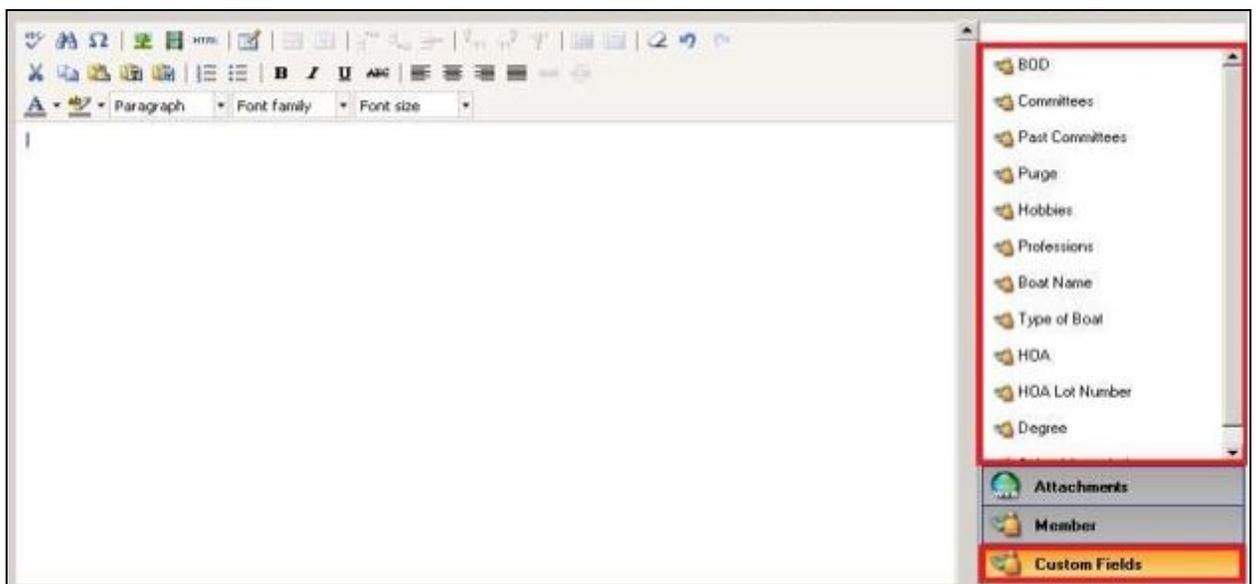
Member

This plugin allows you to customize the **member's personal information** such as their name, web login information, member number and birthdate. It works similar to a mail merge feature pulling information from the database into the document. Click the member information you wish to include. **Example below**



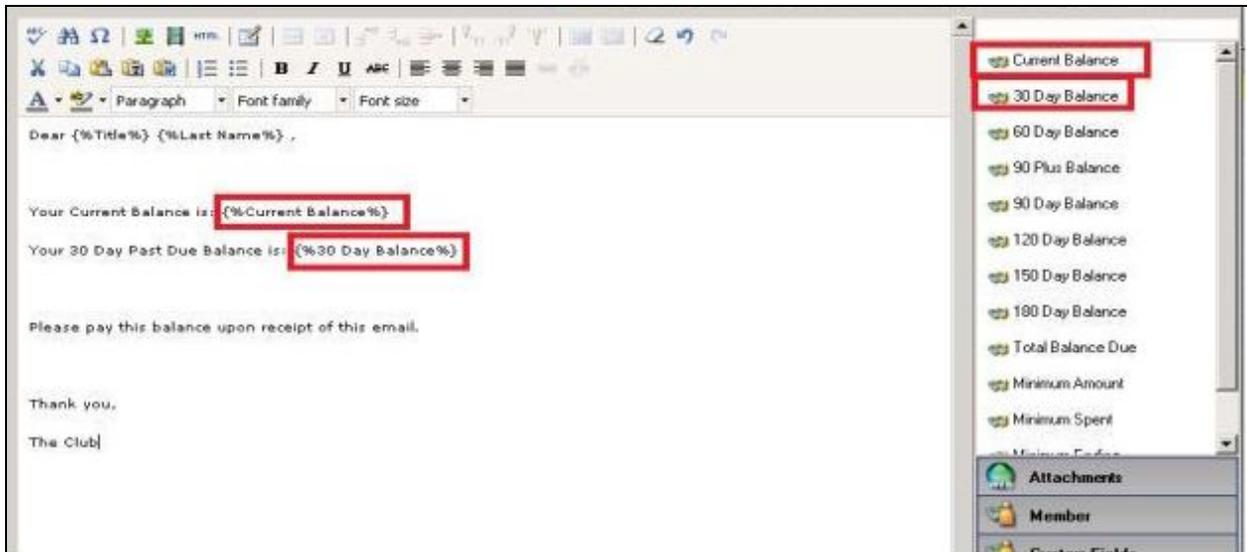
Custom Fields

This plug-in pulls in data from 'custom fields' in the database.



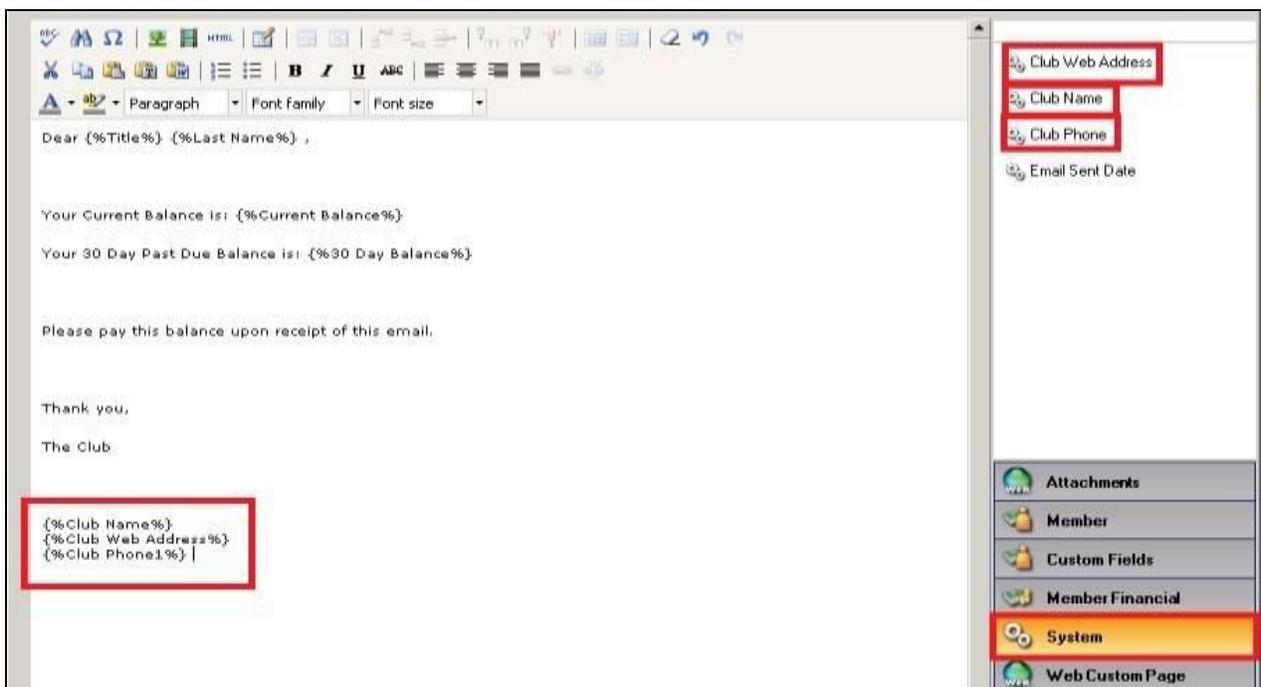
Member Financial

Use this plugin to include data such as **current balance due**, and **past due amounts**.



System

Use this plugin to include system information such as the **club name**, **phone number** and **email address**.

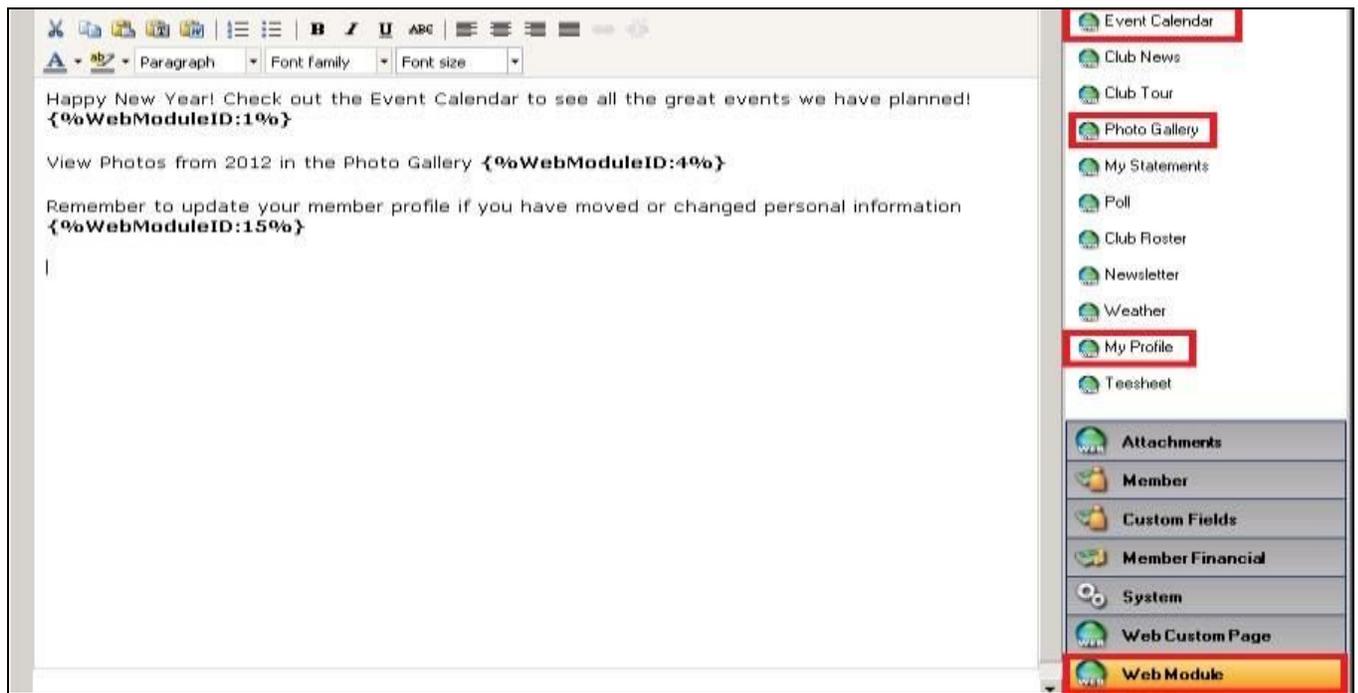


Web Custom Page

If you use the Clubsoft web product, you can use this plugin to link to a custom webpage.

Web Module

If you use the Clubsoft web product, you can link to modules of the website using the various options.



Best Practices

- Click the **Refresh icon** to refresh the images in the Image Manager.
- Access the **File Manager** (where you upload files/documents) by clicking on the File Manager icon.
- **View Mode** allows you to toggle between thumbnail view, which displays a preview of the image, and list view, which shows the file name only.
- Under **Categories**, when the **Images** icon is selected, it will display all images in the Image Manger, **Favorites** will display only images tagged as Favorites, **History** will show recent history and **Folders** will display all created folders in the image manager.

Common Questions and Concerns

Q: My editor does not look like the screenshots provided.

A: Only clients still utilizing CSWeb will use this Classic Editor. New clients will use the improved, Hosted Editor.