

# 5 Email Templates You Should Customize (and how to do it!)

# AGENDA

Benefits of using Email Templates

5 Templates To Customize

- Membership Application Confirmation
- Thank You for Joining
- New Member Access
- Event Registration Confirmation
- Online Payment Receipt

How to Customize Templates

Configure Automated Messaging

# BENEFITS OF USING EMAIL TEMPLATES

## Efficiency

- When you frequently send very similar emails, using templates will save you time in not having to create the same email time over time from scratch. You'll save time and become more efficient at your email tasks

## Consistency

- Your members will easily recognize your emails if you use the same template every time

## Automation

- To benefit from the automated messaging functions in GrowthZone, you will want to design the emails templates that you wish the system to automatically send for you, for example, the Membership Application submitted email

# 5 TEMPLATES TO CUSTOMIZE

## BEST PRACTICE!

- GrowthZone has provided you with a multitude a default template, – customize these templates to suit your needs, rather than starting from scratch.
- Within the default templates GrowthZone has already included many of the merge fields you may need for your communications making it easier for you to add your association specific messaging
- Even when a template is not available for a specific need, you can start with one that has done the work for you in added custom fields

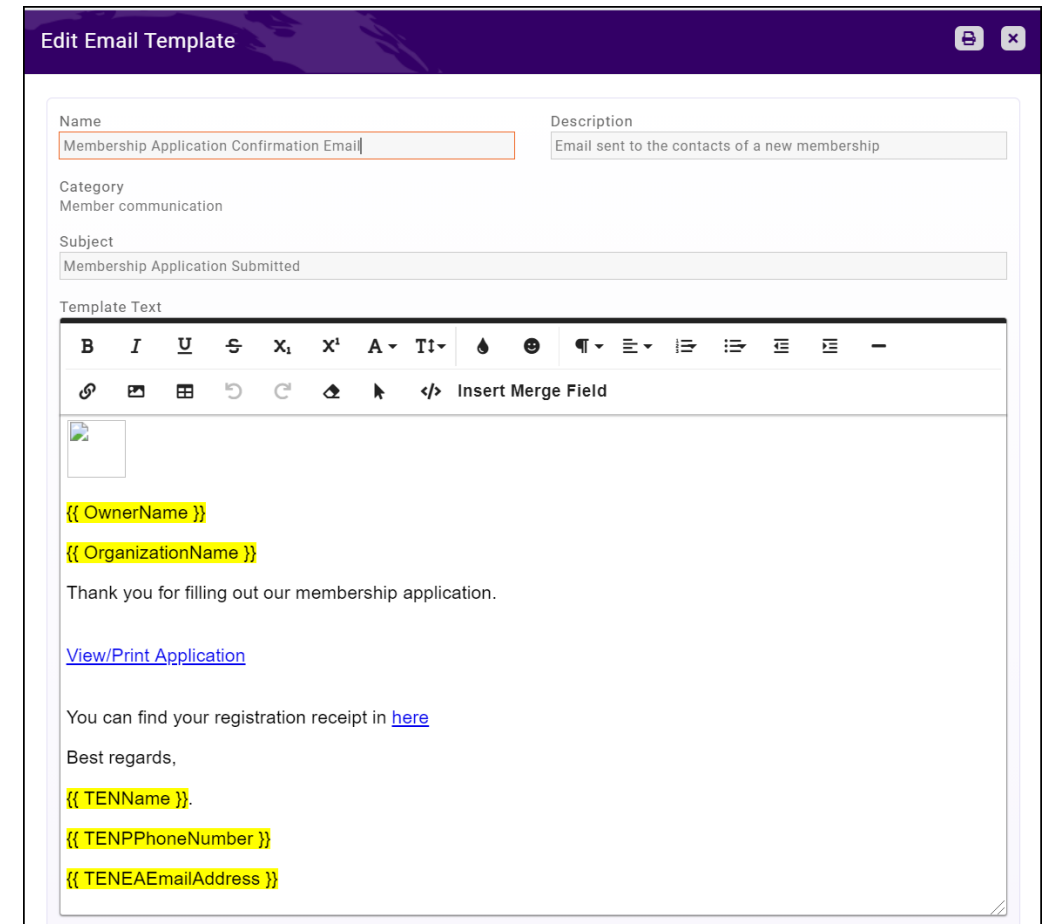
# 5 TEMPLATES TO CUSTOMIZE

## Tip...

- When using merge field, plan on how you will use of the email template... Are you sending an email to an individual or an organization
- For Member Communications, the system will always look to the contact information associated to the email address
- If you are sending communications to an individual, individual contact fields will be pulled into the template
- If you are sending communications to a business/organization email address, contact information would pull from the business

# 1...MEMBERSHIP APPLICATION CONFIRMATION EMAIL

- We all know that best practice is to always confirm that you have received a new member's application.
- This is your opportunity to thank the applicant for applying, re-enforce that they have made the right decision, and let them know next steps
- This email can be sent **automatically** when someone submits an application on-line. Alternately, if you process paper applications, it can be available for you to select when sending an email to the applicant



**Edit Email Template**

Name: Membership Application Confirmation Email

Description: Email sent to the contacts of a new membership

Category: Member communication

Subject: Membership Application Submitted

Template Text

**B I U** [Link] [Image] [Table] [Undo] [Redo] [List] [Text] [Align] [Indent] [Outdent] [Insert Merge Field]

`{{ OwnerName }}`

`{{ OrganizationName }}`

Thank you for filling out our membership application.

[View/Print Application](#)

You can find your registration receipt in [here](#)

Best regards,

`{{ TENName }}`

`{{ TENPPhoneNumber }}`

`{{ TENEAEmailAddress }}`

# 1...MEMBERSHIP APPLICATION SUBMITTED

What's already included for you:















- The name of the person purchasing the membership (owner)
- The organization/business of the membership owner
- Ability to view/print the application
- A receipt for online payment
- The name of your organization









membership Application Confirmation Email | Email sent to the contacts of a new membership


Category  
Member communication

Subject  
Membership Application Submitted

Template Text

**B** *I* U ~~S~~ **X<sub>1</sub>** **X'** **A** **T<sup>+</sup>**              

        Insert Merge Field



**{{ OwnerName }}**

**{{ OrganizationName }}**

Thank you for filling out our membership application.

[View/Print Application](#)

You can find your registration receipt in [here](#)

Best regards,

**{{ TENName }}**

**{{ TENPPhoneNumber }}**

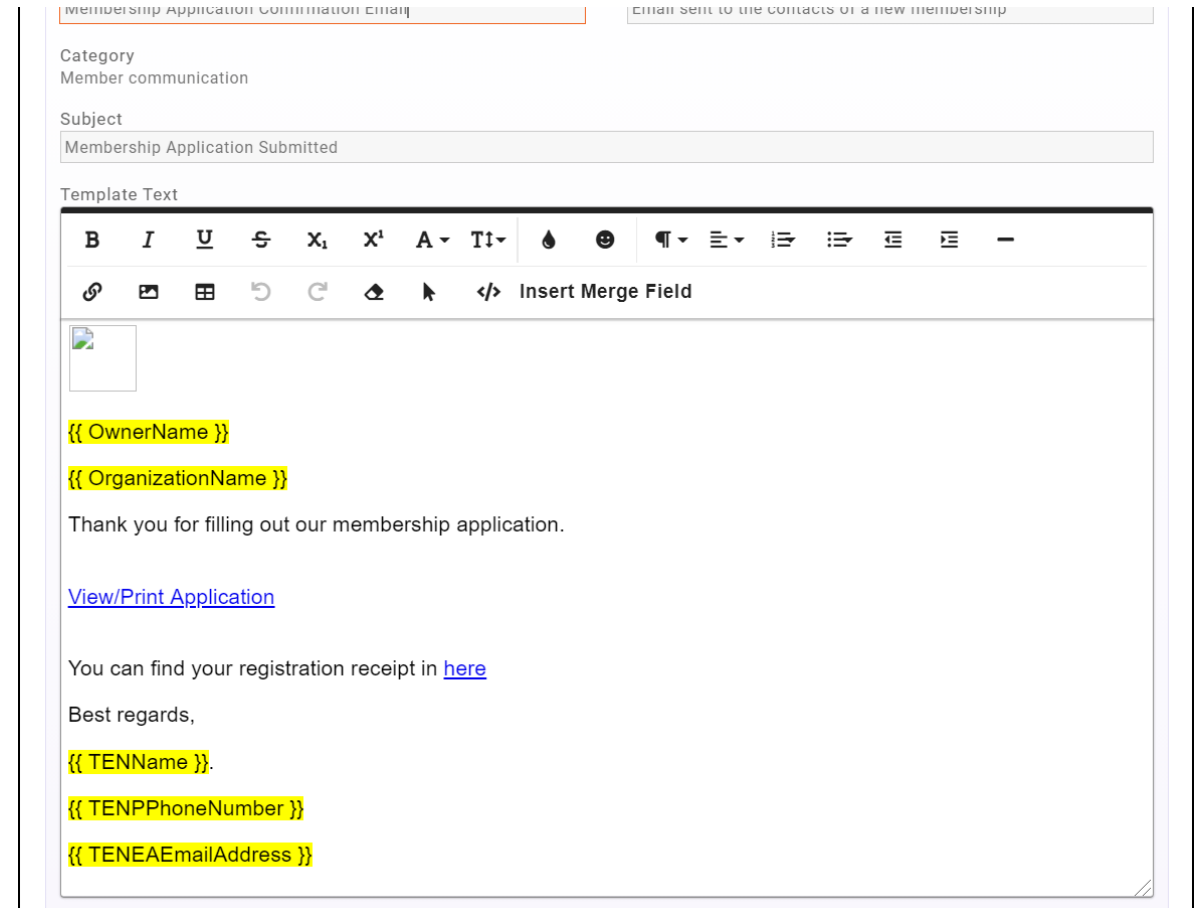
**{{ TENEAEmailAddress }}**

# 1...MEMBERSHIP APPLICATION SUBMITTED

Consider

- Personalized greeting
- Reinforce the great decision that they have made to apply
- Next steps
- Upcoming Events

Did you know... there is also an email template “Membership Application Approved” that can be automatically sent after approval!






membership Application Confirmation Email | Email sent to the contacts of a new membership


Category  
Member communication

Subject  
Membership Application Submitted

Template Text

**B** *I* U ~~S~~ X<sub>1</sub> X' A ▾ T1 ▾ 🔥 😊 📄 ☰ ☷ ☹ ☶ ☷ ☹ -

   ↺ ↻ ↶ ↷ ↘ ↙ </> Insert Merge Field



**{{ OwnerName }}**

**{{ OrganizationName }}**

Thank you for filling out our membership application.

[View/Print Application](#)

You can find your registration receipt in [here](#)

Best regards,

**{{ TENName }}**.

**{{ TENPPhoneNumber }}**

**{{ TENEAEmailAddress }}**

















































## 2...THANK YOU FOR JOINING/NEW MEMBER EMAIL

**Edit Email Template**

Name <input style="width: 90%;" type="text" value="Invite members to login and access benefits"/>	Description <input style="width: 90%;" type="text" value="Share information with your members about the bene"/>
Category Other	
Subject <input style="width: 90%;" type="text" value="Login to Access Member Only Benefits with {{ TENODisplayName }}"/>	

Template Text

**B** *I* U ~~S~~ <sup>X<sub>1</sub></sup> <sup>X<sub>2</sub></sup> **A** **T** **1**                                      

        **Insert Merge Field**

Hello **{{ Contact Name }}**

We are thrilled to share with you how you can use your membership with us to network, view member c events, share your contact information with other members for networking, access vital resources, use advertise news, events, deals and recruit new employees!

[Create your login here](#)

[Login here](#) and make sure your contact profile is complete and update-to-date so others can successfu with you. Explore the site and have fun taking advantage of special members only access.

- While there is not a specific template for “Thank you for Joining”, we suggest that you start with the “Invite members to login and access benefits” template
- Using this template, you can both welcome the new member AND encourage them to take immediate advantage of one of their benefits!
- See our tips on creating your welcome email! [How to Write a Welcome Email for New Members](#)

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## 2...THANK YOU FOR JOINING/NEW MEMBER EMAIL


























**Edit Email Template**

Name	Description
Invite members to login and access benefits	Share information with your members about the benefits

Category  
Other

Subject  
Login to Access Member Only Benefits with {{ TENODisplayName }}

Template Text

**B I U S X<sub>1</sub> X<sub>2</sub> A T<sub>1</sub> T<sub>2</sub>**                           

Insert Merge Field

Hello **{{ Contact Name }}**

We are thrilled to share with you how you can use your membership with us to network, view member events, share your contact information with other members for networking, access vital resources, use advertise news, events, deals and recruit new employees!

[Create your login here](#)

[Login here](#) and make sure your contact profile is complete and update-to-date so others can successfully with you. Explore the site and have fun taking advantage of special members only access.

- When is the sent:
  - This email is not automatically sent, however, you may wish to include it as the first email in a Member On-boarding marketing campaign
- What's already included:
  - Contact Name
  - Create Login link
  - Information about Web Content opportunities

## 2...THANK YOU FOR JOINING/NEW MEMBER EMAIL

**Edit Email Template**

Name Invite members to login and access benefits	Description Share information with your members about the bene
Category Other	
Subject Login to Access Member Only Benefits with {{ TENODisplayName }}	
Template Text	
<div style="background-color: #f0f0f0; padding: 5px; border: 1px solid #ccc;"> <p> <span style="font-weight: bold;">B</span> <span style="font-style: italic;">I</span> <span style="text-decoration: underline;">U</span> <span style="border: 1px solid black; padding: 2px;">X<sub>1</sub></span> <span style="border: 1px solid black; padding: 2px;">X<sup>1</sup></span> <span style="font-weight: bold;">A</span> <span style="font-size: 1.2em;">T</span> <span style="font-size: 0.8em;">T</span> <span style="font-size: 1.5em;">T</span> <span style="font-size: 2em;">T</span> <span style="font-size: 3em;">T</span> <span style="font-size: 4em;">T</span> <span style="font-size: 5em;">T</span> <span style="font-size: 6em;">T</span> <span style="font-size: 7em;">T</span> <span style="font-size: 8em;">T</span> <span style="font-size: 9em;">T</span> <span style="font-size: 10em;">T</span> <span style="font-size: 11em;">T</span> <span style="font-size: 12em;">T</span> <span style="font-size: 13em;">T</span> <span style="font-size: 14em;">T</span> <span style="font-size: 15em;">T</span> <span style="font-size: 16em;">T</span> <span style="font-size: 17em;">T</span> <span style="font-size: 18em;">T</span> <span style="font-size: 19em;">T</span> <span style="font-size: 20em;">T</span> <span style="font-size: 21em;">T</span> <span style="font-size: 22em;">T</span> <span style="font-size: 23em;">T</span> <span style="font-size: 24em;">T</span> <span style="font-size: 25em;">T</span> <span style="font-size: 26em;">T</span> <span style="font-size: 27em;">T</span> <span style="font-size: 28em;">T</span> <span style="font-size: 29em;">T</span> <span style="font-size: 30em;">T</span> <span style="font-size: 31em;">T</span> <span style="font-size: 32em;">T</span> <span style="font-size: 33em;">T</span> <span style="font-size: 34em;">T</span> <span style="font-size: 35em;">T</span> <span style="font-size: 36em;">T</span> <span style="font-size: 37em;">T</span> <span style="font-size: 38em;">T</span> <span style="font-size: 39em;">T</span> <span style="font-size: 40em;">T</span> <span style="font-size: 41em;">T</span> <span style="font-size: 42em;">T</span> <span style="font-size: 43em;">T</span> <span style="font-size: 44em;">T</span> <span style="font-size: 45em;">T</span> <span style="font-size: 46em;">T</span> <span style="font-size: 47em;">T</span> <span style="font-size: 48em;">T</span> <span style="font-size: 49em;">T</span> <span style="font-size: 50em;">T</span> <span style="font-size: 51em;">T</span> <span style="font-size: 52em;">T</span> <span style="font-size: 53em;">T</span> <span style="font-size: 54em;">T</span> <span style="font-size: 55em;">T</span> <span style="font-size: 56em;">T</span> <span style="font-size: 57em;">T</span> <span style="font-size: 58em;">T</span> <span style="font-size: 59em;">T</span> <span style="font-size: 60em;">T</span> <span style="font-size: 61em;">T</span> <span style="font-size: 62em;">T</span> <span style="font-size: 63em;">T</span> <span style="font-size: 64em;">T</span> <span style="font-size: 65em;">T</span> <span style="font-size: 66em;">T</span> <span style="font-size: 67em;">T</span> <span style="font-size: 68em;">T</span> <span style="font-size: 69em;">T</span> <span style="font-size: 70em;">T</span> <span style="font-size: 71em;">T</span> <span style="font-size: 72em;">T</span> <span style="font-size: 73em;">T</span> <span style="font-size: 74em;">T</span> <span style="font-size: 75em;">T</span> <span style="font-size: 76em;">T</span> <span style="font-size: 77em;">T</span> <span style="font-size: 78em;">T</span> <span style="font-size: 79em;">T</span> <span style="font-size: 80em;">T</span> <span style="font-size: 81em;">T</span> <span style="font-size: 82em;">T</span> <span style="font-size: 83em;">T</span> <span style="font-size: 84em;">T</span> <span style="font-size: 85em;">T</span> <span style="font-size: 86em;">T</span> <span style="font-size: 87em;">T</span> <span style="font-size: 88em;">T</span> <span style="font-size: 89em;">T</span> <span style="font-size: 90em;">T</span> <span style="font-size: 91em;">T</span> <span style="font-size: 92em;">T</span> <span style="font-size: 93em;">T</span> <span style="font-size: 94em;">T</span> <span style="font-size: 95em;">T</span> <span style="font-size: 96em;">T</span> <span style="font-size: 97em;">T</span> <span style="font-size: 98em;">T</span> <span style="font-size: 99em;">T</span> <span style="font-size: 100em;">T</span> </p> </div>	
<p>Hello <span style="background-color: yellow;">{{ Contact Name }}</span></p> <p>We are thrilled to share with you how you can use your membership with us to network, view member events, share your contact information with other members for networking, access vital resources, use advertise news, events, deals and recruit new employees!</p> <p><a href="#">Create your login here</a></p> <p><a href="#">Login here</a> and make sure your contact profile is complete and update-to-date so others can successfully with you. Explore the site and have fun taking advantage of special members only access.</p>	

### Consider:

- A personalized greeting, warm welcome and next steps
- A link to your events calendar or a list of upcoming events
- List of other new members
- How to setup login to the Info Hub and things they should take care of right away
- Social Media links so that new members can follow you
- A testimonial from an existing member

## 3...NEW MEMBER ACCESS

- One of the benefits to offer to your members is access to the Info Hub, your members only portal
- This email is a great way to not only encourage your members to setup up their credentials but also encourage them to update their directory information, take advantage of web content options,
- This email is the default that is set in your system, so important to review and ensure it is the message your association wishes to send

### Edit Email Template

Name	Description
New Member Access	Sent when a new member person is invited
Category	Member communication
Subject	{{ TENName }} Account Creation Link
Template Text	
<p>To create your account <a href="#">click here</a></p> <p>Or if the link isn't working the website address is <b>{{ Login Activation URL }}</b>. This link is valid for 72 hours.</p> <p>If you have any questions or need help creating your login, please contact us for assistance.</p> <p>Thank you,</p> <p><b>{{ TENName }}</b></p> <p><b>{{ TENPPhoneNumber }}</b></p> <p><b>{{ TENEEmailAddress }}</b></p>	

# NEW MEMBER ACCESS

- When is this sent?
  - When using the function to send login instructions to a member, this is the email that will be sent
- What's already included for you:
  - A link to create an account
  - Your association/chamber name
- Consider:
  - A link to the Info Hub tour video
  - Adding links to How To videos, found in our on-line wiki
  - Recommendations on updating their Directory Listing
  - Information on opportunities you offer, such as hot deals, job postings, etc
  - If using the forum, encourage your new member to participate

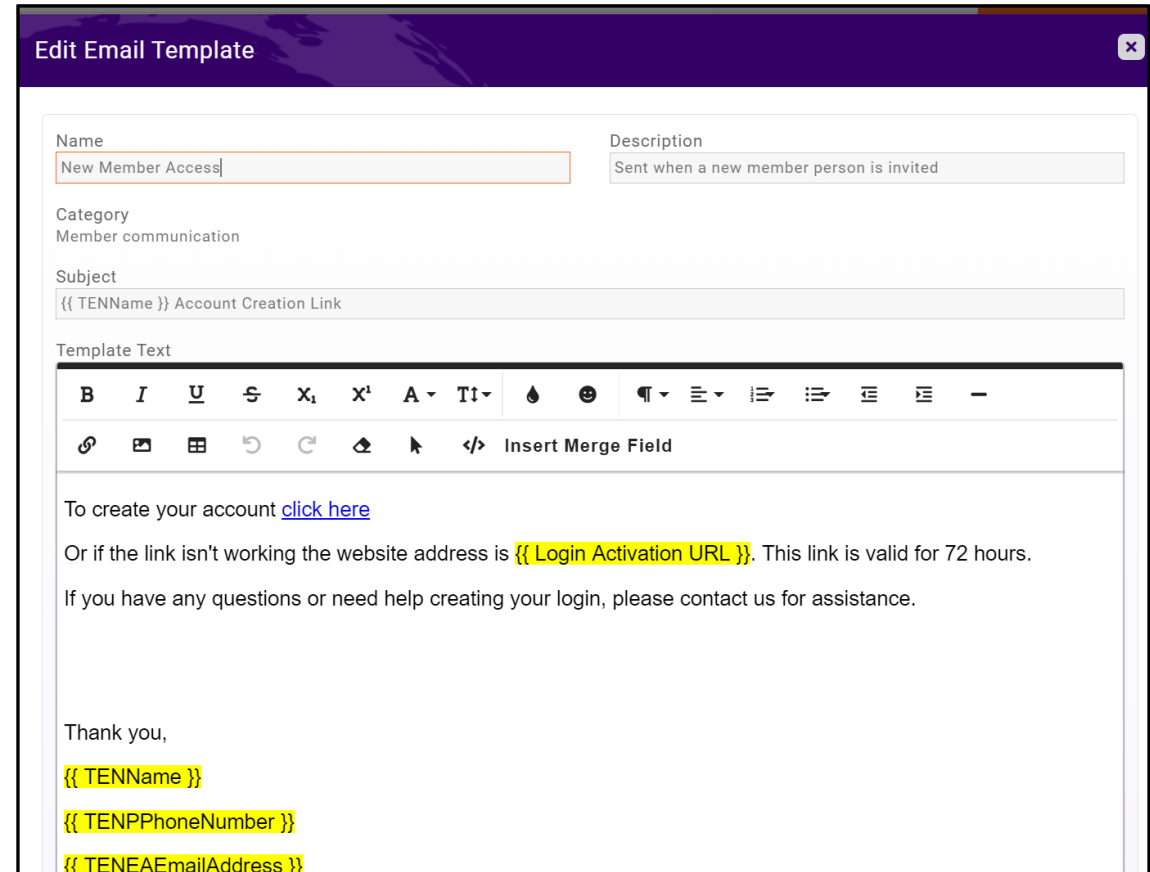
Edit Email Template ✕

Name New Member Access	Description Sent when a new member person is invited
Category Member communication	
Subject {{ TENName }} Account Creation Link	
Template Text <div style="border: 1px solid #ccc; padding: 5px;"> <div style="background-color: #f0f0f0; padding: 2px;"> <span style="font-weight: bold;">B</span> <span style="font-style: italic;">I</span> <span style="text-decoration: underline wavy;">U</span> <span style="text-decoration: underline wavy;">S</span> <span style="font-size: 1.2em;">X<sub>1</sub></span> <span style="font-size: 1.2em;">X<sup>1</sup></span> <span style="font-weight: bold;">A</span> <span style="font-size: 1.2em;">T<sup>1</sup></span> </div> <div style="background-color: #f0f0f0; padding: 2px;"> <span style="font-size: 1.2em;">🔗</span> <span style="font-size: 1.2em;">📧</span> <span style="font-size: 1.2em;">📧</span> <span style="font-size: 1.2em;">↶</span> <span style="font-size: 1.2em;">↷</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">-</span> </div> <div style="background-color: #f0f0f0; padding: 2px;"> <span style="font-size: 1.2em;">🔗</span> <span style="font-size: 1.2em;">📧</span> <span style="font-size: 1.2em;">📧</span> <span style="font-size: 1.2em;">↶</span> <span style="font-size: 1.2em;">↷</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">📌</span> <span style="font-size: 1.2em;">-</span> </div> </div>	
<p>To create your account <a href="#">click here</a></p> <p>Or if the link isn't working the website address is {{ Login Activation URL }}. This link is valid for 72 hours.</p> <p>If you have any questions or need help creating your login, please contact us for assistance.</p> <p>Thank you,</p> <p style="background-color: yellow;">{{ TENName }}</p> <p style="background-color: yellow;">{{ TENPPhoneNumber }}</p> <p style="background-color: yellow;">{{ TENEAEmailAddress }}</p>	

## 3...NEW MEMBER ACCESS

Consider:

- A link to the Info Hub tour video
- Adding links to How To videos, found in our on-line wiki. WIKI: [Training for Your Members](#)
- Recommendations on updating their Directory Listing
- Information on opportunities you offer, such as hot deals, job postings, etc
- If using the forum, encourage your new member to participate



The screenshot shows the 'Edit Email Template' interface. The title bar is purple with the text 'Edit Email Template' and a close button. The form contains the following fields:

- Name:** New Member Access
- Description:** Sent when a new member person is invited
- Category:** Member communication
- Subject:** {{ TENName }} Account Creation Link
- Template Text:** A rich text editor with a toolbar containing icons for bold, italic, underline, strikethrough, text color, background color, link, unlink, list, and indent. The text area contains:

To create your account [click here](#)

Or if the link isn't working the website address is {{ Login Activation URL }}. This link is valid for 72 hours.

If you have any questions or need help creating your login, please contact us for assistance.

Thank you,

{{ TENName }}

{{ TENPPhoneNumber }}

{{ TENEEmailAddress }}

## 4...EVENT REGISTRATION CONFIRMATION

- An event confirmation email should be sent confirming for the attendee that their registration has been received.
- It should also provide important details regarding the **event**: date, time, place, etc.
- When is this email sent?
  - If set under your Automated messaging this email is sent when someone registers for your event
  - Sent to event registrants when they complete event registration

Edit Email Template
🔒 ✕

Name Registered Event Attendee	Description Sent when new attendee are registered for event.
Category Event	
Subject {{ EName }} - attendee registered	

B I U ↺ X<sub>i</sub> X' A T I ↻ 🔍 🌐 ↶ ↷ ↵ ↶ ↷ ↵ ↶ ↷ ↵
Insert Merge Field

🖼️

You have been {{ AttendeeAction }} to attend {{ Event Name }} event on {{ Event Start Date }}

{{ EventConfirmationMessage }}

{{ Exhibitor Confirmation Message }}

Your registration ID is: {{ Registrationid }}

{{ Attendee Session Table }}

You can find registration invoice in [here](#).

You can find registration receipt in [here](#).

{{ LinkToReceipt }}

You may wish to tentatively add this event to your calendar by clicking [here](#).

You can update your status [here](#), or update your registration information [here](#).

🖼️ Registration ID QR Code

{{ ContactDetailsSection }}

Thank you,

{{ TENName }}

{{ TENPPhoneNumber }}

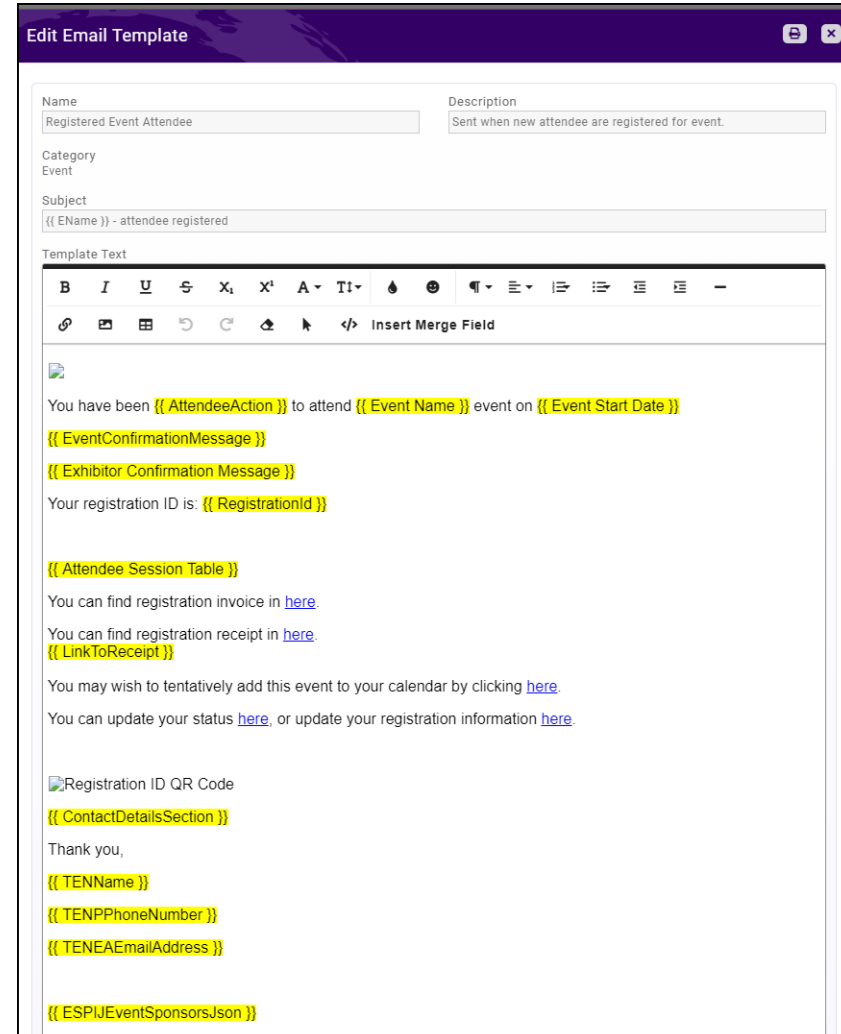
{{ TENEEmailAddress }}

{{ ESPIEventSponsorsJson }}

## 4...EVENT REGISTRATION CONFIRMATION

What's already included for you:

- Event details
- Attendee Status
- Event specific confirmation message
- Exhibitor confirmation details
- Invoice or receipt
- Add to calendar option
- Update registration option
- Registration QR Code
- Event Contact Details
- Your organization information
- Sponsors if applicable



The screenshot shows the 'Edit Email Template' interface. The template is titled 'Registered Event Attendee' and is described as 'Sent when new attendee are registered for event.' The category is 'Event' and the subject is '{{ EName }} - attendee registered'. The template text includes a rich text editor with the following content:

You have been **{{ AttendeeAction }}** to attend **{{ Event Name }}** event on **{{ Event Start Date }}**  
**{{ EventConfirmationMessage }}**  
**{{ Exhibitor Confirmation Message }}**  
Your registration ID is: **{{ RegistrationId }}**  
**{{ Attendee Session Table }}**  
You can find registration invoice in [here](#).  
You can find registration receipt in [here](#).  
**{{ LinkToReceipt }}**  
You may wish to tentatively add this event to your calendar by clicking [here](#).  
You can update your status [here](#), or update your registration information [here](#).

Registration ID QR Code  
**{{ ContactDetailsSection }}**  
Thank you,  
**{{ TENName }}**  
**{{ TENPPhoneNumber }}**  
**{{ TENEEmailAddress }}**  
**{{ ESPIEventSponsorsJson }}**



# 4...EVENT REGISTRATION CONFIRMATION

Edit Email Template ✖

Name: Registered Event Attendee | Description: Sent when new attendee are registered for event.

Category: Event

Subject: {{ EName }} - attendee registered

Template Text

**B I U S X<sub>1</sub> X<sup>1</sup> A T** | [Icons]

[Icons] | Insert Merge Field

You have been **[[ AttendeeAction ]]** to attend **[[ Event Name ]]** event on **[[ Event Start Date ]]**  
**[[ EventConfirmationMessage ]]**  
**[[ Exhibitor Confirmation Message ]]**  
 Your registration ID is: **[[ RegistrationId ]]**

**[[ Attendee Session Table ]]**

You can find registration invoice in [here](#).  
 You can find registration receipt in [here](#).  
**[[ LinkToReceipt ]]**

You may wish to tentatively add this event to your calendar by clicking [here](#).  
 You can update your status [here](#), or update your registration information [here](#).

Registration ID QR Code  
**[[ ContactDetailsSection ]]**

Thank you,  
**[[ TENName ]]**  
**[[ TENPhoneNumber ]]**  
**[[ TENEEmailAddress ]]**

**[[ ESPIEventSponsors.Json ]]**

Instructions and Confirmation Messaging ✖

Attendee Registration Instructions

**B I U S X<sub>1</sub> X<sup>1</sup> A T** | [Icons]

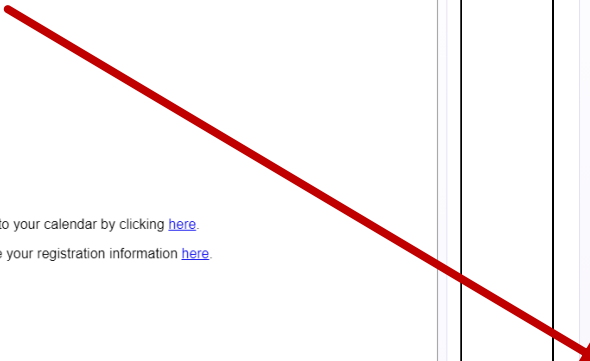
[Icons]

Event Confirmation Message

**B I U S X<sub>1</sub> X<sup>1</sup> A T** | [Icons]

[Icons]

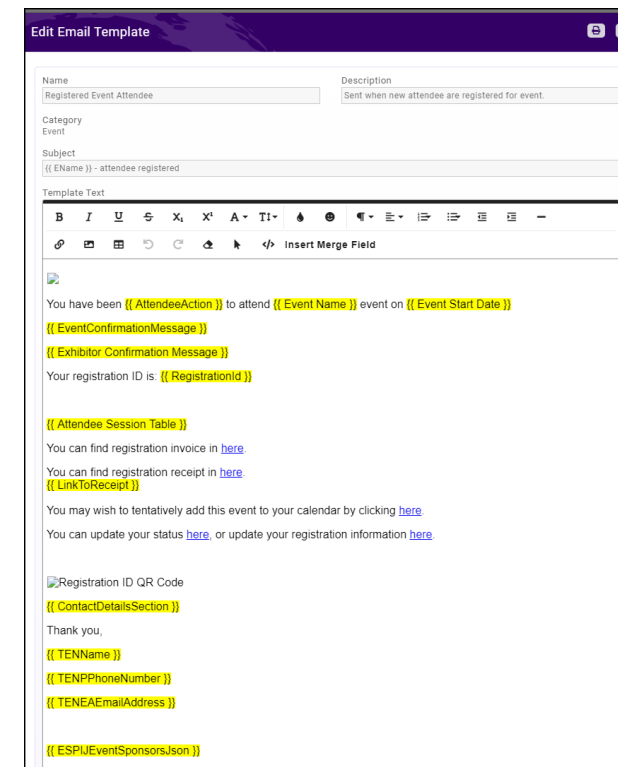
**Thank you for registering for our Annual Conference. We look forward to seeing you there!**



# 4...EVENT REGISTRATION CONFIRMATION

## Consider

- This template is used for ALL events, so ensure that the customization is not event specific
- At the event level, you can configure the event confirmation which will be included in the confirmation
- If you are not using the staff app for check-in, you may wish to remove the QR code. If you are using the staff app you may wish to provide information around the use of the QR code
- Change the header to add Zing!!
- Call out your Sponsors



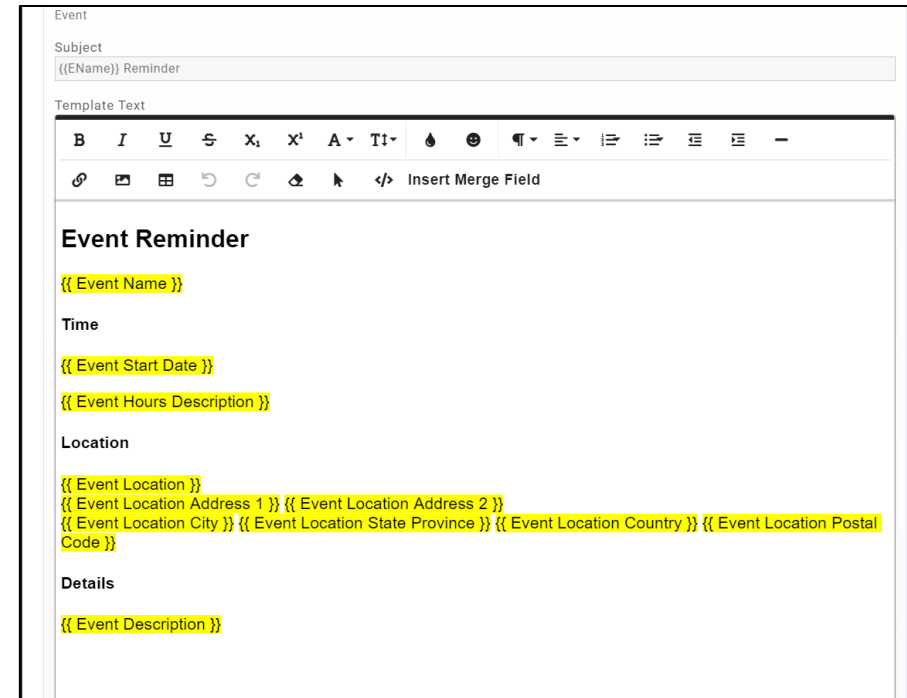
# EVENT MERGE FIELDS YOU SHOULD KNOW

- Name of the Attendee {{ Attendee Display Name }}
- Event Name {{ Event Name }}
- Event Start Date {{ Event Start Date }}
- Event Date & Time {{ Date and time }}
- Registration Type {{ Registration Type Name }}
- Event Short Description {{ Event Short Description }}
- Event Confirmation Message {{ EventConfirmationMessage }}
- List of Sponsors {{ ESPIJEventSponsorsJson }}
- {{ ContactDetailsSection }} Will include the name of your organization, the name of the contact for the event, contact and any contact details you have included on the event page

Did you know... you can include custom fields in the subject line!

# OTHER EVENT EMAILS TO KNOW...

- Event Reminder template
- Event Waiting List Automatic Notice
- Unregistered Event Attendee
- Registered Exhibitor
- Event Postponement Notice
- Event Cancelation Notice





## 5...ON-LINE PAYMENT RECEIPT

- Consider:
  - Updated formatting
  - A link to the Info Hub so the contact can view their billing activity {{ Info Hub Login URL }}
  - The contact's current balance {{ Contact Balance }}












Edit Email Template


Name	Description
Online Payment Receipt	Receipt sent to user who pays an online invoice.

Category  
Billing finance

Subject  
{{ TENName }} Payment Receipt - Invoice #{{InvoiceNumber}}

Template Text

**B** *I* U ~~X~~ <sup>X'</sup> A Tt             Insert Merge Field

 {{ TENName }}

**Payment Received for Invoice(s) {{ InvoiceNumber }}**

Total Balance: {{ OldBalance }}  
Total Payment: {{ Amount }}  
New Total Balance: {{ NewBalance }}  
Payment Date: {{ PaymentDate }}  
Transaction ID: {{ TransactionID }}

[To view the paid invoice, click here.](#) Thank you for your payment!

This email was automatically generated; please do not reply.

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## OTHER BILLING/FINANCE TEMPLATES TO KNOW

### Auto Payment Receipt

- If you have auto-charge setup, this email is sent when a credit card or ACH is automatically charged

### Member Invoice Payment Received

- Member Invoice Payment Received – when staff processes a payment via the back office, an option to send a payment receipt is available

### Sale Payment Receipt















- If you are using the store module, when a purchase is made on-line, by credit card, this email is sent


COMING SOON! Currently we are developing an email template to be used when you send out your invoices, making it easier for you to provide the message you wish when delivering invoice

# HOW TO...

- Make a Copy of a Default Template
- Update Automated Messaging

Name	Description
Membership Application Confirmation Email	Email sent to the contacts of a new membership
Category	Member communication
Subject	Membership Application Submitted
Template Text	

**B** *I* U ~~S~~ ~~X<sub>1</sub>~~ ~~X<sub>1</sub>~~ **A** **T**               Insert Merge Field



**{{ OwnerName }}**

**{{ OrganizationName }}**

Thank you for filling out our membership application.

[View/Print Application](#)

You can find your registration receipt in [here](#)

Best regards,

**{{ TENName }}**.

**{{ TENPPhoneNumber }}**

**{{ TENEAEmailAddress }}**








# HOW TO...

- Make a Copy/Edit a Default Template
  - Rename the copy!
  - Subject Line
  - Edit your Content
  - Add Merge Fields
  - WIKI: [Edit a Default Email Template](#)

[Back to Setup](#)

Membership  Member communication


[+ Add Template](#) [+ Add Email Designer Template](#)

Name	Category	Description	Shows in Template list	Actions
<a href="#">Membership Application Confirmation Email</a>	Member Communication	Email sent to the contacts of a new membership	No	
<a href="#">Membership Application Confirmation Email Copy</a>	Member Communication	Email sent to the contacts of a new membership	Yes	  
<a href="#">Membership Application Approved</a>	Member Communication	Membership Application Approved Template	No	

# AUTOMATED MESSAGING

- Many emails can be automatically sent, without any interaction on your part and for some, a default message has been configured
- If you are editing email templates that you wish to be sent automatically, you **MUST** make the appropriate change under **Setup > Communications > Automated Messaging**
- For Example: As the Event Registration Confirmation can be sent out automatically, if you have customized the template, make the needed change
- WIKI: [Automated Messaging](#)

✕
Edit Email Template

Name Membership Application Confirmation Email	Description Email sent to the contacts of a new membership
Category Member communication	
Subject Membership Application Submitted	
<div style="border: 1px solid #ccc; padding: 5px;"> <p>Template Text</p> <div style="border: 1px solid #ccc; padding: 5px;"> <span>B I U S X<sub>1</sub> X<sup>1</sup> A T</span> <span style="float: right;">↕ ☺</span> </div> <div style="border: 1px solid #ccc; padding: 5px;"> <span>🔗 📧 📁 ↺ ↻ ↶ ↷</span> <span style="float: right;">&lt;/&gt; Insert Merge Field</span> </div> <div style="padding: 10px;">  <p> <span style="background-color: yellow;">{{ OwnerName }}</span>  <span style="background-color: yellow;">{{ OrganizationName }}</span>                      Thank you for filling out our membership application.  <a href="#">View/Print Application</a>                      You can find your registration receipt in <a href="#">here</a>                      Best regards,  <span style="background-color: yellow;">{{ TENName }}</span>.  <span style="background-color: yellow;">{{ TENPPhoneNumber }}</span>  <span style="background-color: yellow;">{{ TENEAEmailAddress }}</span> </p> </div> </div>	

# AUTOMATED MESSAGING

- For Example: As the Event Registration Confirmation can be sent out automatically, if you have customized the template, be sure to change the automate “Template to Send”
- WIKI: [Automated Messaging](#)

[Back to Setup](#)

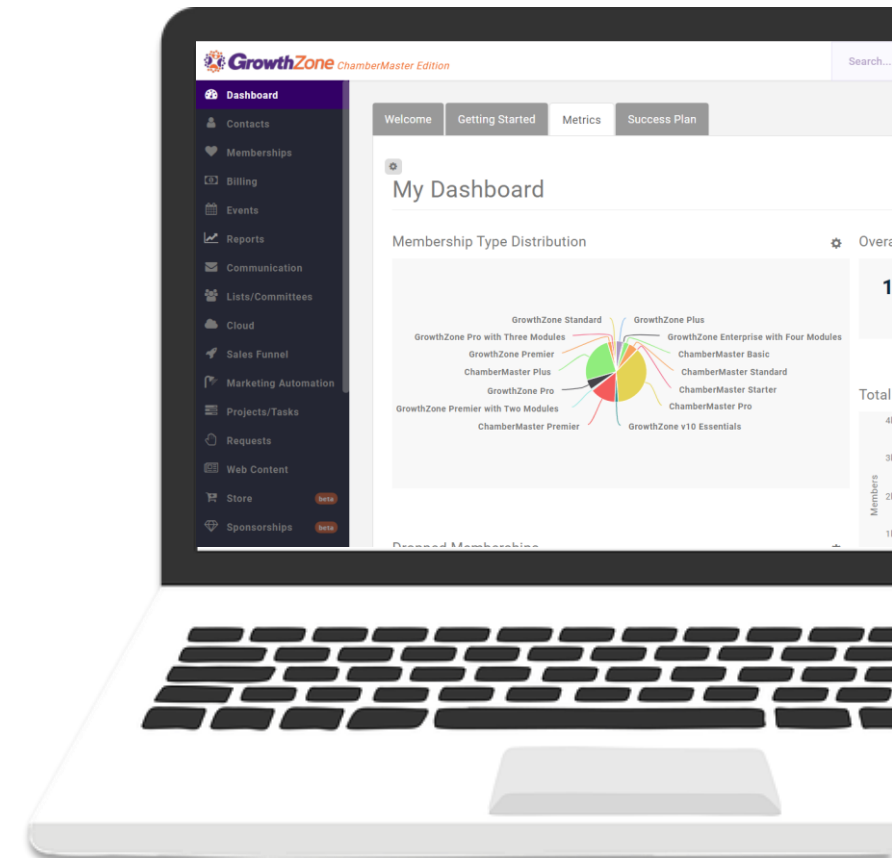
## Automated Messaging

Search... Event Save

Category	Reason for message	Template To Send	Do Not Send
Event	Registered Event Attendee	Registered Event Attendee	<input type="checkbox"/>
Event	Unregistered Event Attendee	Unregistered Event Attendee	<input checked="" type="checkbox"/>
Event	Send Event Attendee Itinerary	Event Session Itinerary Confirmation	<input type="checkbox"/>
Event	Event Approved	Event approved by staff	<input type="checkbox"/>
Event	Registered Event Exhibitor	Registered Event Exhibitor	<input type="checkbox"/>
Event	Event Reminder	Event Reminder	<input type="checkbox"/>
Event	Event Waiting List Automatic Notice	Event Waiting List Automatic Notice	<input checked="" type="checkbox"/>

## ADDITIONAL TRAINING RESOURCES

- GrowthZone Essentials – On Demand
- 5 Ways Training Sessions – On Demand
- Live Training Sessions
- On-line WIKI
- Role Based Training Sessions





**GrowthZone**  
smarter association software

**QUESTIONS?**

