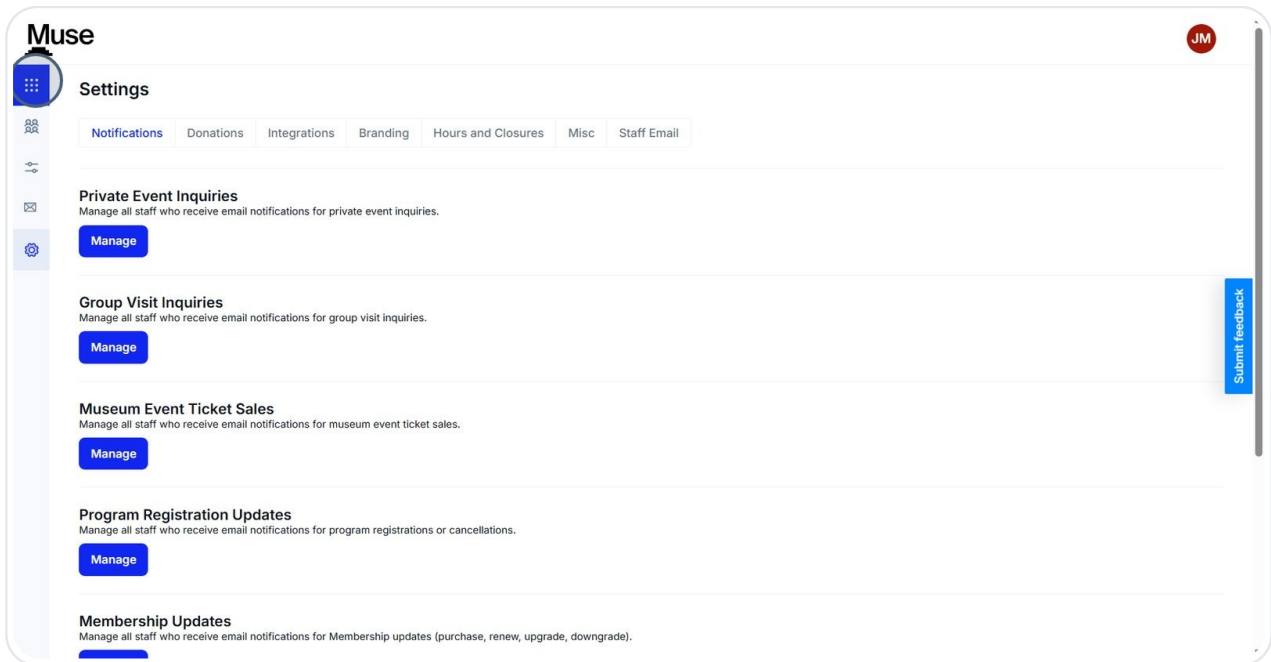


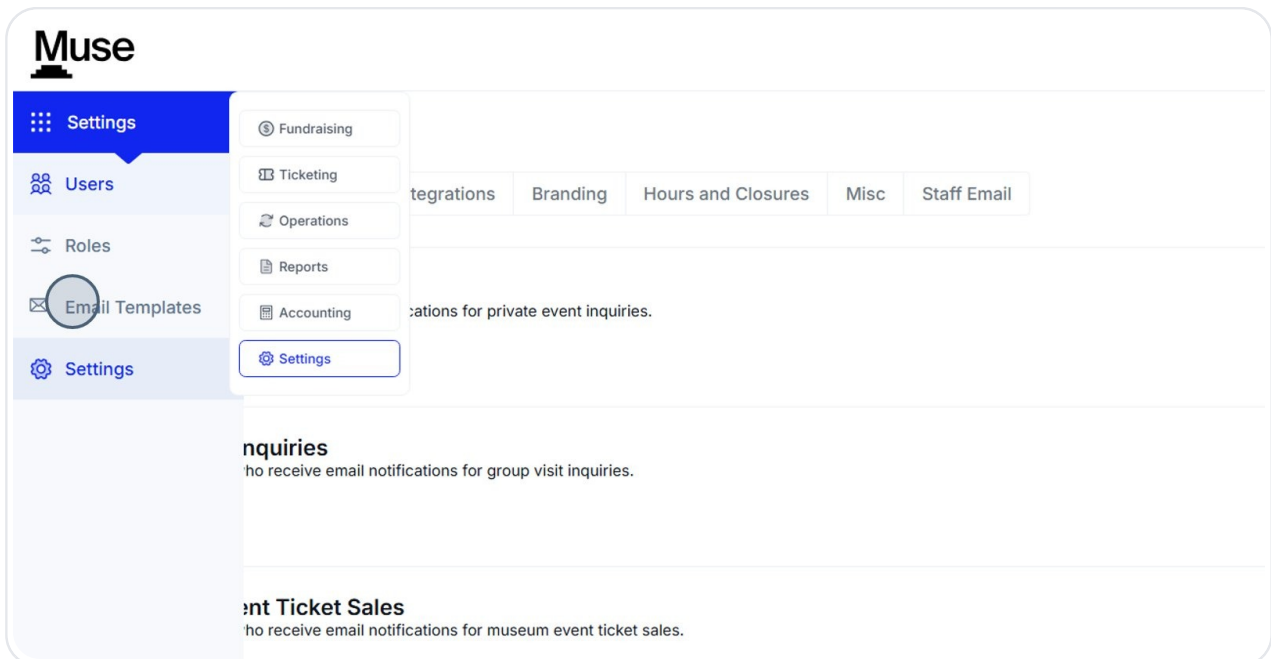


Automated Membership Renewal Reminders

1. Click the blue North Star icon.



2. Choose the 'Email Templates' tab.



3. The 'Auto-Renewal Charge Notice' is sent to members before their memberships renew automatically.

Membership Charge Notice	Sends the user an email after purchasing a group membership				
Refund Confirmation	Sends the user an email after a refund is issued			☒	
Registration Cancellation	Sent to registrants when their registration is canceled			☒	
Registration Confirmation	Sent to program registrants after successful registration			☒	
Waitlist Confirmation	Sent to waitlisted registrants when moved to confirmed status			☒	
Waitlist Entry	Sent to waitlisted registrants when they sign up for the waitlist			☒	
Waitlist Spot Available	Sent to staff when a registration is cancelled			☒	
Waitlist Withdrawal	Sent to waitlisted registrants when they withdraw from the waitlist			☒	
Scheduled Program Notification (Single Session)	Sent to program registrants n hours/days before/after the Program	🕒 1 day before		☒	
Program Purchase Information Required	Sends to the Constituent who purchased a Program to complete the signup Forms			☒	
Scheduled Pledge Installment Payment Link	Sent to donors n hours/days before/after the due date	🕒 1 day before		☒	
Group Visit Inquiry Received	Sent to the group contact when a group visit request is submitted (self-serve or staff), acknowledging receipt.			☒	
Group Visit Booking Confirmed	Sent to the group contact when staff set the group visit status to Confirmed.			☒	
Scheduled Program Notification (Single Session)	Sent to program registrants n hours/days before/after the Program	🕒 10 days before		☒	
Auto-Renewal Charge Notice	Sent to members whose membership will auto-renew	🕒 30 days before expiration		☐	
Manual Renewal Reminder	Sent to members whose membership will not auto-renew	🕒 30 days before expiration		☐	

Submit feedback

↑

4. The 'Manual Renewal Reminder' is sent to members who opted-out of auto-renewal regarding their upcoming membership renewal.

Waitlist Entry	Sent to waitlisted registrants when they sign up for the waitlist
Waitlist Spot Available	Sent to staff when a registration is cancelled
Waitlist Withdrawal	Sent to waitlisted registrants when they withdraw from the waitlist
Scheduled Program Notification (Single Session)	Sent to program registrants n hours/days before/after the Program
Program Purchase Information Required	Sends to the Constituent who purchased a Program to complete the signup Forms
Scheduled Pledge Installment Payment Link	Sent to donors n hours/days before/after the due date
Group Visit Inquiry Received	Sent to the group contact when a group visit request is submitted (self-serve or staff), acknowledging receipt.
Group Visit Booking Confirmed	Sent to the group contact when staff set the group visit status to Confirmed.
Scheduled Program Notification (Single Session)	Sent to program registrants n hours/days before/after the Program
Auto-Renewal Charge Notice	Sent to members whose membership will auto-renew
Manual Renewal Reminder	Sent to members whose membership will not auto-renew

5. Click the vertical ellipses next to the email template you wish to edit or clone.

its when they sign up for the waitlist		☒		⋮
ration is cancelled		☒		⋮
its when they withdraw from the waitlist		☒		⋮
s n hours/days before/after the Program	🕒 1 day before	☒		⋮
who purchased a Program to complete the signup Forms		☒		⋮
ys before/after the due date	🕒 1 day before	☒		⋮
when a group visit request is submitted (self-serve or staff), acknowledging receipt.		☒		⋮
when staff set the group visit status to Confirmed.		☒		⋮
s n hours/days before/after the Program	🕒 10 days before	☒		⋮
embership will auto-renew	🕒 30 days before expiration	☐		⋮
embership will not auto-renew	🕒 30 days before expiration	☐		⋮

Submit feedback

↑

6. Click 'Edit' for the reminder you want to customize.

its when they sign up for the waitlist		☒		⋮
ration is cancelled		☒		⋮
its when they withdraw from the waitlist		☒		⋮
s n hours/days before/after the Program	🕒 1 day before	☒		⋮
who purchased a Program to complete the signup Forms		☒		⋮
ys before/after the due date	🕒 1 day before	☒		⋮
when a group visit request is submitted (self-serve or staff), acknowledging receipt.		☒		⋮
when staff set the group visit status to Confirmed.		☒		⋮
s n hours/days before/after the Program	🕒 10 days before	☒		⋮
embership will auto-renew	🕒 30 days before expiration	☐		⋮
embership will not auto-renew	🕒 30 days before expiration	☐		⋮

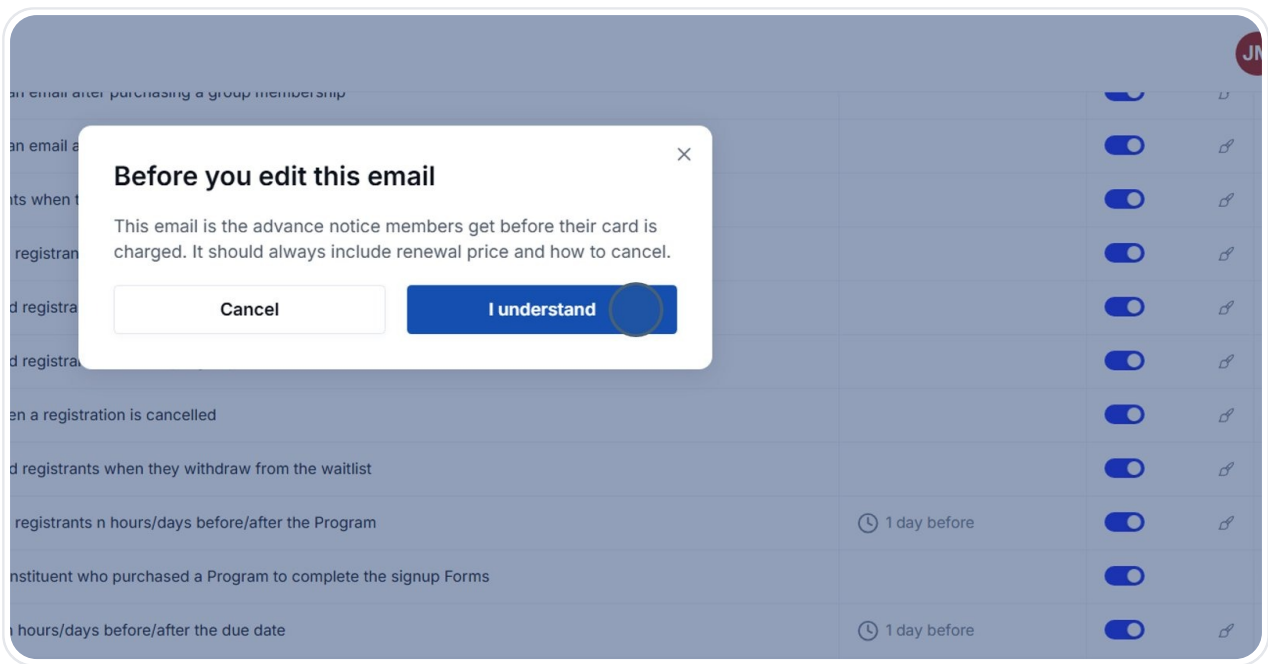
Submit feedback

↑

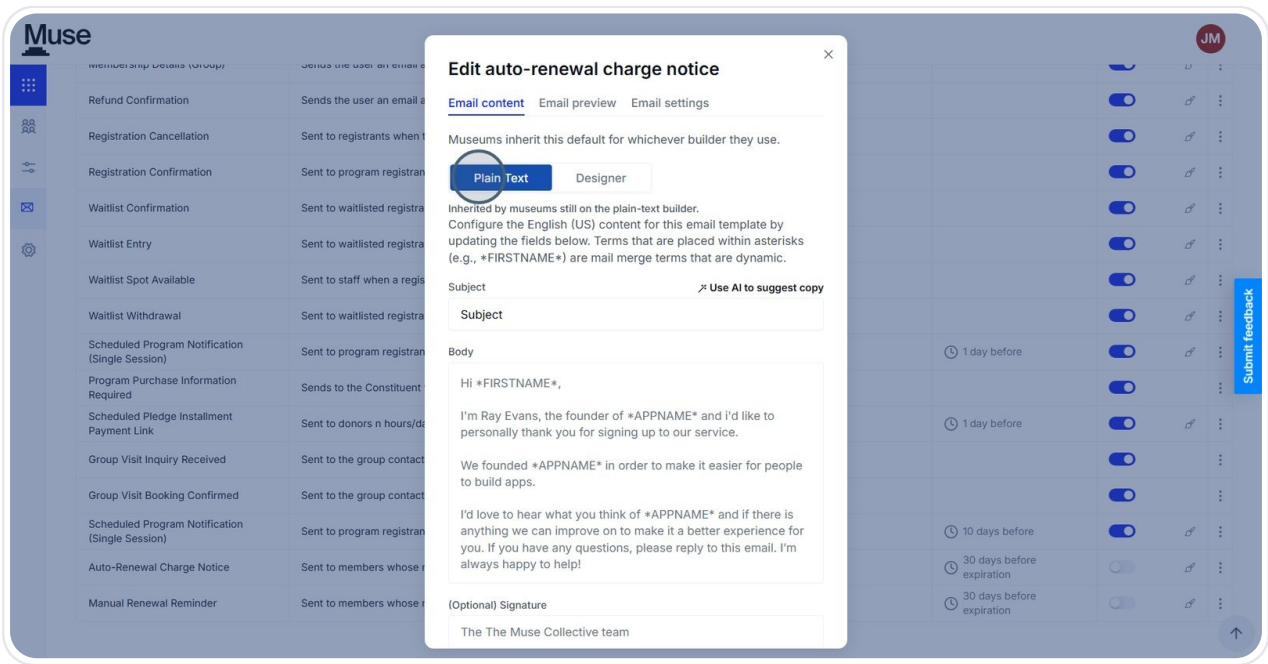
Edit

Clone

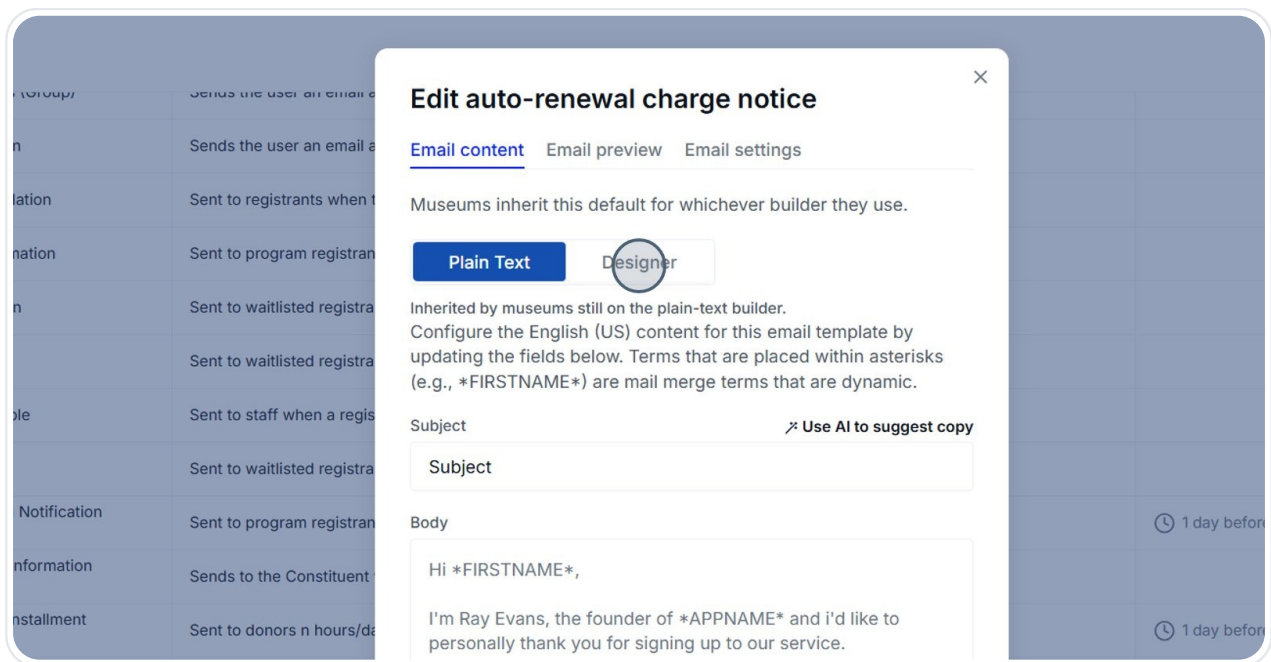
7. You will be prompted to acknowledge the editing instructions before making any edits to the auto-renewal charge notice template.



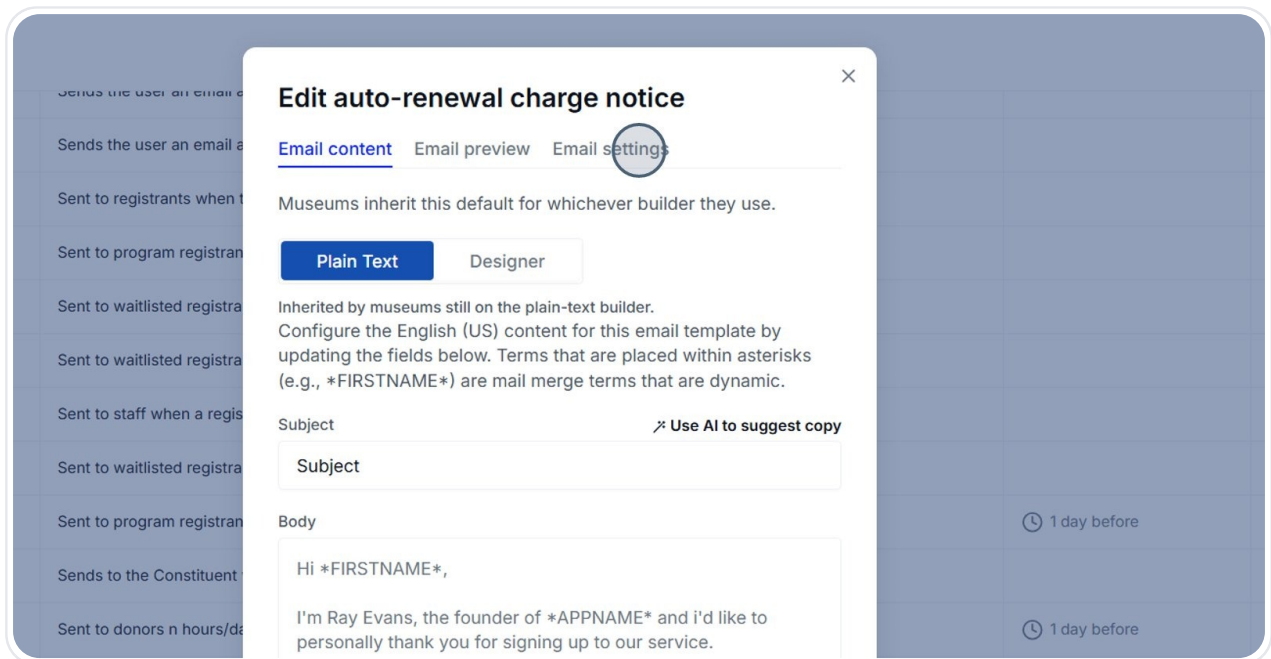
8. Switch to 'Plain Text' to effortlessly edit the basic copy of your renewal email.



9. Jump to 'Designer' mode for an intuitive drag-and-drop visual editing experience.



10. Click Email Settings to configure timing and audience.



11. Set how many days in advance the auto-renewal notification will be sent for timely reminders.

12. Choose whether your notice is sent before or after a membership expires to match your strategy.

[illegible]

13. Pick which membership levels will receive your renewal notifications for precise targeting.

Edit auto-renewal charge notice

Email content [Email settings](#)

Timing (days) Before or after expiration

Membership levels

- ☒ Select all
- ☒ Family
- ☒ Individual
- ☒ Individual + 1
- ☒ Lifetime Membership
- ☒ Senior Membership
- ☒ Student
- ☒ Supporter Membership

14. Click 'Save changes' when finished.

Membership levels

- ☒ Select all
- ☒ Family
- ☒ Individual
- ☒ Individual + 1
- ☒ Lifetime Membership
- ☒ Senior Membership
- ☒ Student
- ☒ Supporter Membership

		☒
		☒
		☒
	🕒 1 day before	☒
	🕒 1 day before	☒
		☒
	🕒 10 days before	☒
Members whose membership will auto-renew	🕒 30 days before expiration	☐
Members whose membership will not auto-renew	🕒 30 days before expiration	☐

15. Select 'Edit' and follow the same steps to configure the Manual Renewal Reminder.

	Membership Details (Group)	Sends the user an email after purchasing a group membership				JM
	Refund Confirmation	Sends the user an email after a refund is issued				
	Registration Cancellation	Sent to registrants when their registration is canceled				
	Registration Confirmation	Sent to program registrants after successful registration				
	Waitlist Confirmation	Sent to waitlisted registrants when moved to confirmed status				
	Waitlist Entry	Sent to waitlisted registrants when they sign up for the waitlist				
	Waitlist Spot Available	Sent to staff when a registration is cancelled				
	Waitlist Withdrawal	Sent to waitlisted registrants when they withdraw from the waitlist				
	Scheduled Program Notification (Single Session)	Sent to program registrants n hours/days before/after the Program	1 day before			
	Program Purchase Information Required	Sends to the Constituent who purchased a Program to complete the signup Forms				
	Scheduled Pledge Installment Payment Link	Sent to donors n hours/days before/after the due date	1 day before			
	Group Visit Inquiry Received	Sent to the group contact when a group visit request is submitted (self-serve or staff), acknowledging receipt.				
	Group Visit Booking Confirmed	Sent to the group contact when staff set the group visit status to Confirmed.				
	Scheduled Program Notification (Single Session)	Sent to program registrants n hours/days before/after the Program	10 days before			
	Auto-Renewal Charge Notice	Sent to members whose membership will auto-renew	30 days before expiration			
	Manual Renewal Reminder	Sent to members whose membership will not auto-renew	30 days before expiration			