

GrowthZone Classroom Training: Communications & Lists/Committees

EMAIL TEMPLATES

Email Templates

Benefits of using Email Templates

5 Templates To Customize

- Membership Application Confirmation
- Thank You for Joining
- New Member Access
- Event Registration Confirmation
- Invoice Email

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 of default templates – customize these to suit your needs, rather than starting from scratch.

Within these default templates are many of the merge fields you may need for your communications- making it easier for you to add your association-specific messaging.

Even if a template is not available for a specific need, you can start with one that has done most of the work for you and add additional merge fields and/or custom fields.

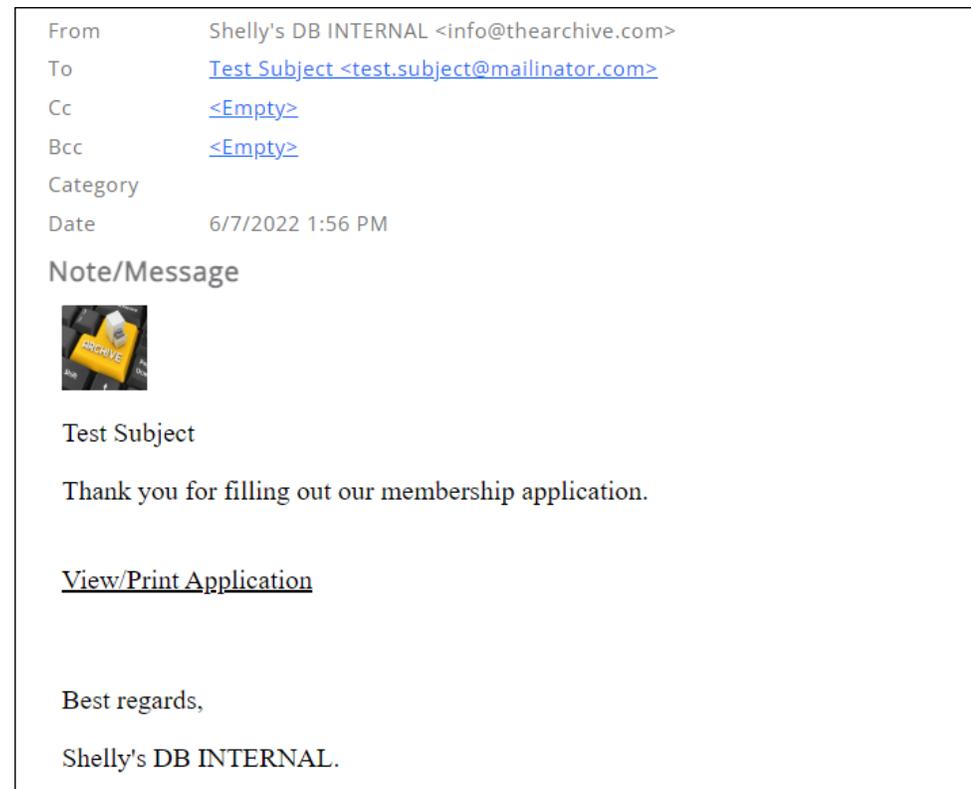
5 Templates to Customize

Tips...

- When using merge fields, determine how you will use 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

Always confirm that you have received a new member's application!



1. Membership Application Confirmation Email

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

2. Membership Application Approved

This email is sent once you approve a membership application in the back office.

See our tips on creating your welcome email!

[How to Write a Welcome Email for New Members](#)

Edit Email Template < 5 of 5 >  

Name*	Description
<input type="text" value="Membership Application Approved Copy"/>	<input type="text" value="Membership Application Approved Template"/>

Category*

Subject*

Template Text*

Your membership application for **{{TENName}}** has been approved.

Membership Details:

Description: **{{MembershipType}}**

Frequency: **{{Frequency}}**

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

If you have any questions or need more information, please give us a call or send us an email to arrange a time for us to connect.

Thank you for your support and partnership!

Best regards,

{{TENName}}

{{TENPPhoneNumber}}

{{TENEEmailAddress}}

2. Membership Application Approved

When is it sent:

- This email is automatically sent once you approve an application

What's already included:

- The name of your association
- The membership that was approved
- The frequency at which the membership will renew

Edit Email Template < 5 of 5 >  

Name*	Description
<input type="text" value="Membership Application Approved Copy"/>	<input type="text" value="Membership Application Approved Template"/>

Category*

Subject*

Template Text*

Your membership application for **{{TENName}}** has been approved.

Membership Details:

Description: **{{MembershipType}}**

Frequency: **{{Frequency}}**

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

If you have any questions or need more information, please give us a call or send us an email to arrange a time for us to connect.

Thank you for your support and partnership!

Best regards,

{{TENName}}

{{TENPPhoneNumber}}

{{TENEAEmailAddress}}

2. Membership Application Approved

Consider:

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

Edit Email Template < 5 of 5 >  

Name*	Description
<input type="text" value="Membership Application Approved Copy"/>	<input type="text" value="Membership Application Approved Template"/>

Category*

Subject*

Template Text*

Your membership application for **{{TENName}}** has been approved.

Membership Details:

Description: **{{MembershipType}}**

Frequency: **{{Frequency}}**

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

If you have any questions or need more information, please give us a call or send us an email to arrange a time for us to connect.

Thank you for your support and partnership!

Best regards,

{{TENName}}

{{TENPPhoneNumber}}

{{TENEAEmailAddress}}

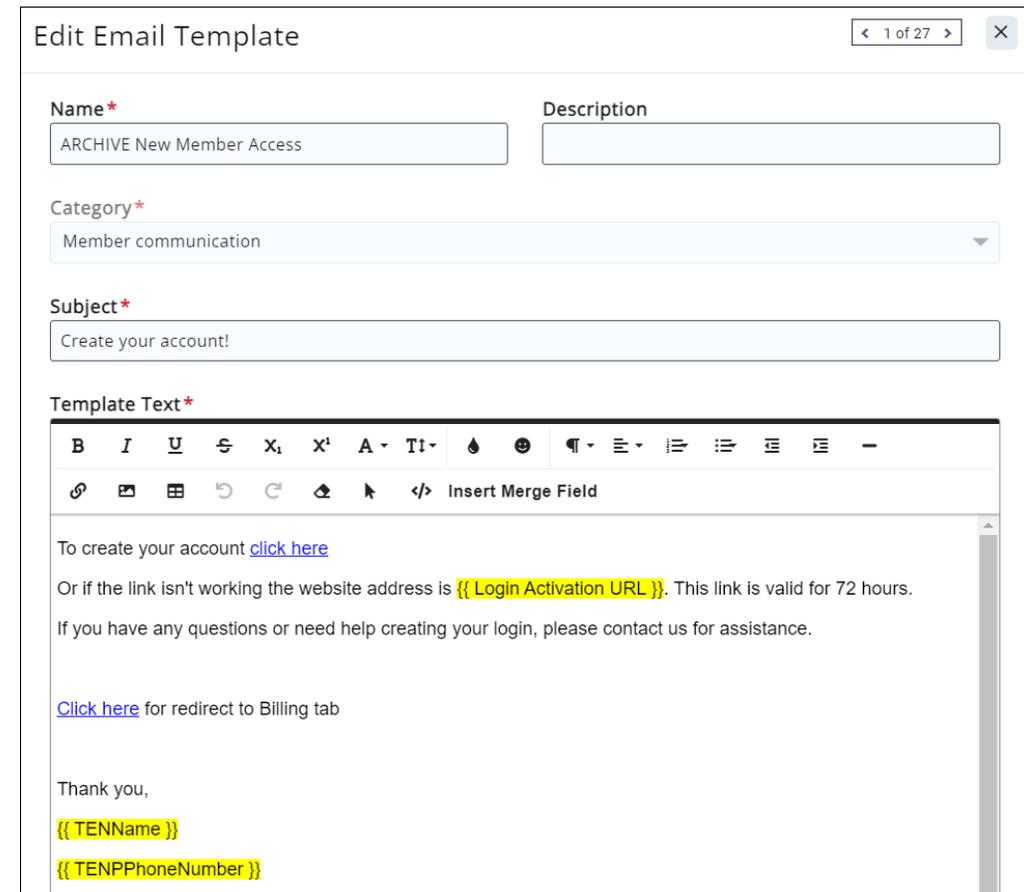
3. New Member Access

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



The screenshot shows a web interface for editing an email template. The title is "Edit Email Template" with a close button and a page indicator "1 of 27". The form contains the following fields:

- Name***: ARCHIVE New Member Access
- Description**: (empty)
- Category***: Member communication
- Subject***: Create your account!
- Template Text***: A rich text editor containing the following text:

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.

[Click here](#) for redirect to Billing tab

Thank you,
{{ TENName }}
{{ TENPhoneNumber }}

4. Event Registration Confirmation

The screenshot shows the 'Edit Email Template' window with the following details:

- Name:** JUNE Registered Event Attendee
- Description:** Sent when new attendee are registered for event.
- Category:** Event
- Subject:** {{ EName }} - attendee registered
- Template Text:** A rich text editor containing the following content:
 - You have been [{{ AttendeeAction }}](#) to attend [{{ Event Name }}](#) event on [{{ Event Start Date }}](#)
 - [{{ Event Confirmation Message }}](#)
 - [{{ ConditionalExhibitorConfirmationMessage }}](#)
 - Your registration ID is: [{{ RegistrationId }}](#)
 - [{{ Attendee Session Table }}](#)
 - You can find your registration invoice in [here](#).
 - You can find your registration receipt in [here](#).
 - [{{ LinkToReceipt }}](#)
 - You may wish to add this event to your:
 - Google Calendar by clicking [here](#)
 - Or to download iCal (Outlook, Apple, or other) click [here](#)
 - You can update your status [here](#), or update your registration information [here](#).
 - Registration ID QR Code
 - [{{ ContactDetailsSection }}](#)
 - Thank you,
 - [{{ TENName }}](#)
 - [{{ TENPPhoneNumber }}](#)
 - [{{ TENEEmailAddress }}](#)
 - [{{ ESPUEventSponsors.Json }}](#)

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.

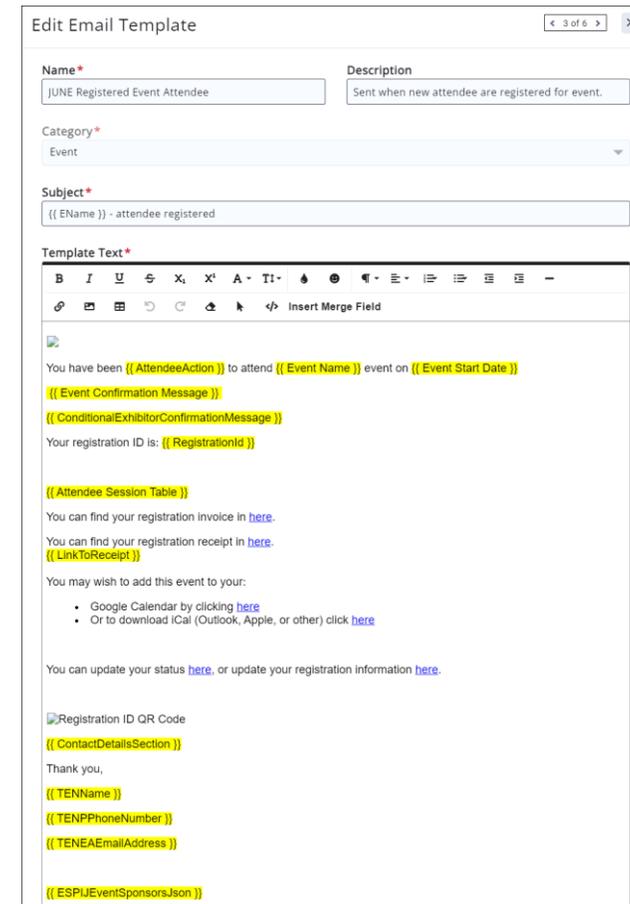
When is this email sent?

- If set under your Automated Messaging, this email is sent to event registrants when they complete event registration

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. It includes the following fields and content:

- Name***: JUNE Registered Event Attendee
- Description**: Sent when new attendee are registered for event.
- Category***: Event
- Subject***: {{ EName }} - attendee registered
- Template Text***:
 - Rich text editor with a toolbar containing icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, and Merge Field.
 - Text: You have been **{{ AttendeeAction }}** to attend **{{ Event Name }}** event on **{{ Event Start Date }}**.
 - Text: **{{ Event Confirmation Message }}**
 - Text: **{{ ConditionalExhibitorConfirmationMessage }}**
 - Text: Your registration ID is: **{{ RegistrationId }}**
 - Text: **{{ Attendee Session Table }}**
 - Text: You can find your registration invoice in [here](#).
 - Text: You can find your registration receipt in [here](#).
 - Text: **{{ LinkToReceipt }}**
 - Text: You may wish to add this event to your:
 - Google Calendar by clicking [here](#)
 - Or to download iCal (Outlook, Apple, or other) click [here](#)
 - Text: You can update your status [here](#), or update your registration information [here](#).
 - Text: **Registration ID QR Code**
 - Text: **{{ ContactDetailsSection }}**
 - Text: Thank you,
 - Text: **{{ TENName }}**
 - Text: **{{ TENPhoneNumber }}**
 - Text: **{{ TENEmailAddress }}**
 - Text: **{{ ESPIEventSponsors.Json }}**

4. Event Registration Confirmation

Edit Email Template < 3 of 6 > ✕

Name* Description

Category*

Subject*

Template Text*

B I U X₁ X₂ A T₁ 

 You have been **{{ AttendeeAction }}** to attend **{{ Event Name }}** event on **{{ Event Start Date }}**
{{ Event Confirmation Message }}
{{ ConditionalExhibitorConfirmationMessage }}
Your registration ID is: **{{ RegistrationId }}**

{{ Attendee Session Table }}
You can find your registration invoice in [here](#).
You can find your registration receipt in [here](#).
{{ LinkToReceipt }}
You may wish to add this event to your:

- Google Calendar by clicking [here](#)
- Or to download iCal (Outlook, Apple, or other) click [here](#)

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

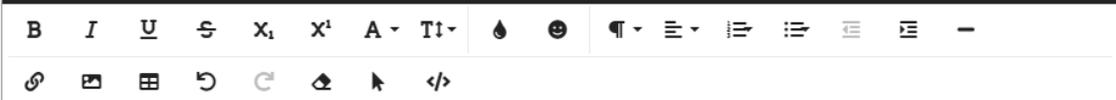
 Registration ID QR Code
{{ ContactDetailsSection }}
Thank you,
{{ TENName }}
{{ TENPhoneNumber }}
{{ TENEmailAddress }}

{{ ESPJEventSponsorsJson }}

Attendee Messaging ✕

Confirmation Email Template (optional) ⓘ

Confirmation Message ⓘ

B I U X₁ X₂ A T₁ 

Thank you for registering for Golf and Learn Expo. We can't wait to see you!

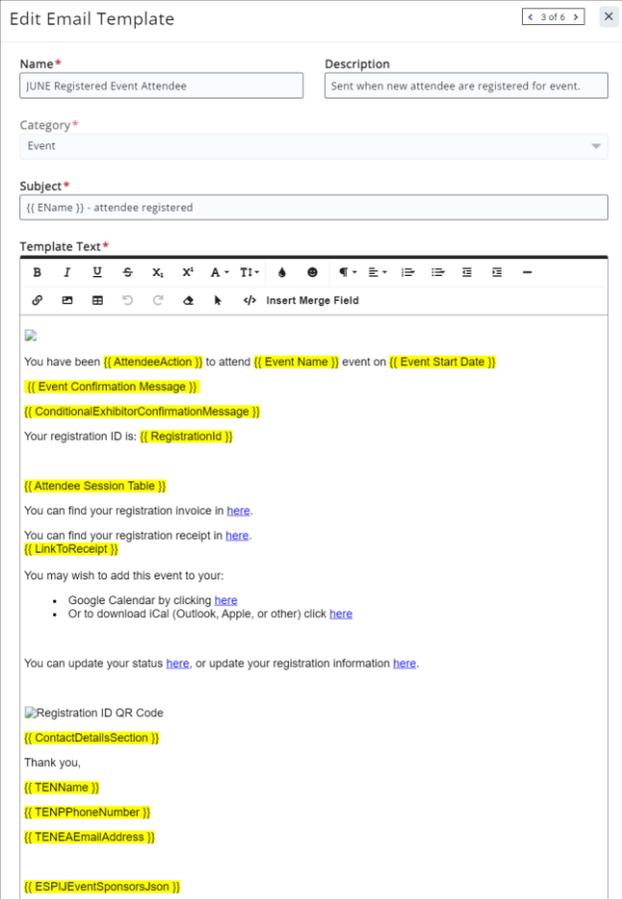
Registration Instructions ⓘ

B I U X₁ X₂ A T₁ 

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 also configure a custom email confirmation FOR THAT EVENT ONLY
- 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 subject to add zing!
- Call out your Sponsors (i.e. don't remove the merge field!)



The screenshot shows the 'Edit Email Template' interface. It includes the following fields and content:

- Name***: JUNE Registered Event Attendee
- Description**: Sent when new attendee are registered for event.
- Category***: Event
- Subject***: {{ EName }} - attendee registered
- Template Text***:
 - Rich text editor with a toolbar containing icons for Bold, Italic, Underline, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, and Unlink.
 - Text: You have been **{{ AttendeeAction }}** to attend **{{ Event Name }}** event on **{{ Event Start Date }}**
 - Text: **{{ Event Confirmation Message }}**
 - Text: **{{ ConditionalExhibitorConfirmationMessage }}**
 - Text: Your registration ID is: **{{ RegistrationId }}**
 - Text: **{{ Attendee Session Table }}**
 - Text: You can find your registration invoice in [here](#).
 - Text: You can find your registration receipt in [here](#).
 - Text: **{{ LinkToReceipt }}**
 - Text: You may wish to add this event to your:
 - Google Calendar by clicking [here](#)
 - Or to download iCal (Outlook, Apple, or other) click [here](#)
 - Text: You can update your status [here](#), or update your registration information [here](#).
 - Text: **Registration ID QR Code**
 - Text: **{{ ContactDetailsSection }}**
 - Text: Thank you,
 - Text: **{{ TENName }}**
 - Text: **{{ TENPhoneNumber }}**
 - Text: **{{ TENEmailAddress }}**
 - Text: **{{ ESPIJEventSponsors.Json }}**

Other event emails you should review

Event Reminder Template

Event Waiting List Automated Message

Unregistered Event Attendee

Registered Exhibitor

Event Postponement Notice

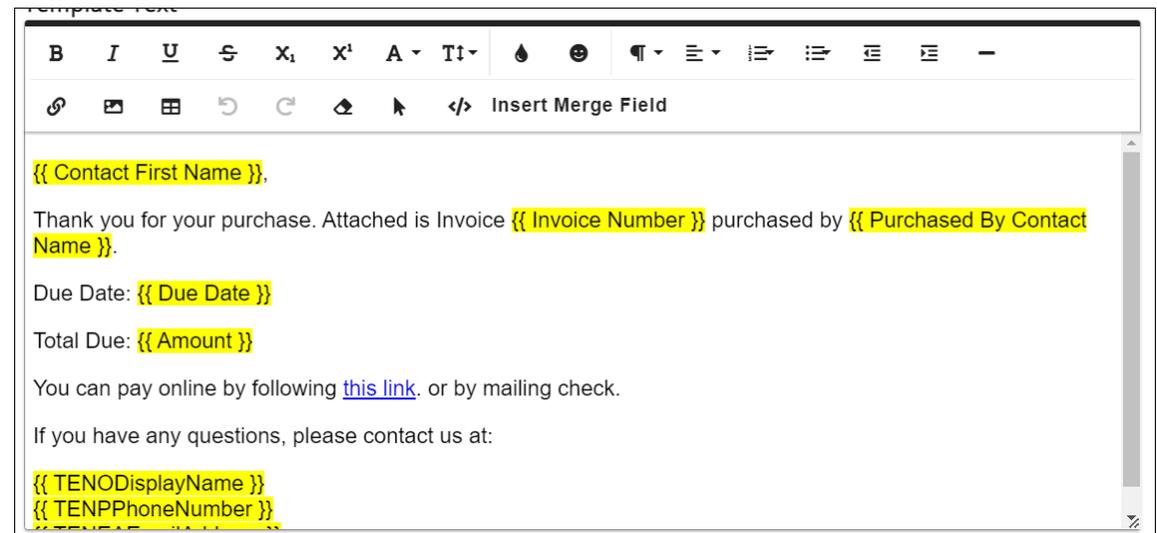
Event Cancellation Notice

5. Invoice Email

You can select this template when sending out renewal invoices in bulk, or if you are sending a single invoice to deliver.

What is already included:

- Subject line includes invoice number
- Invoice # and purchased by
- Due Date
- Total Due
- Link to access the info hub.



Other billing/finance templates to review

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

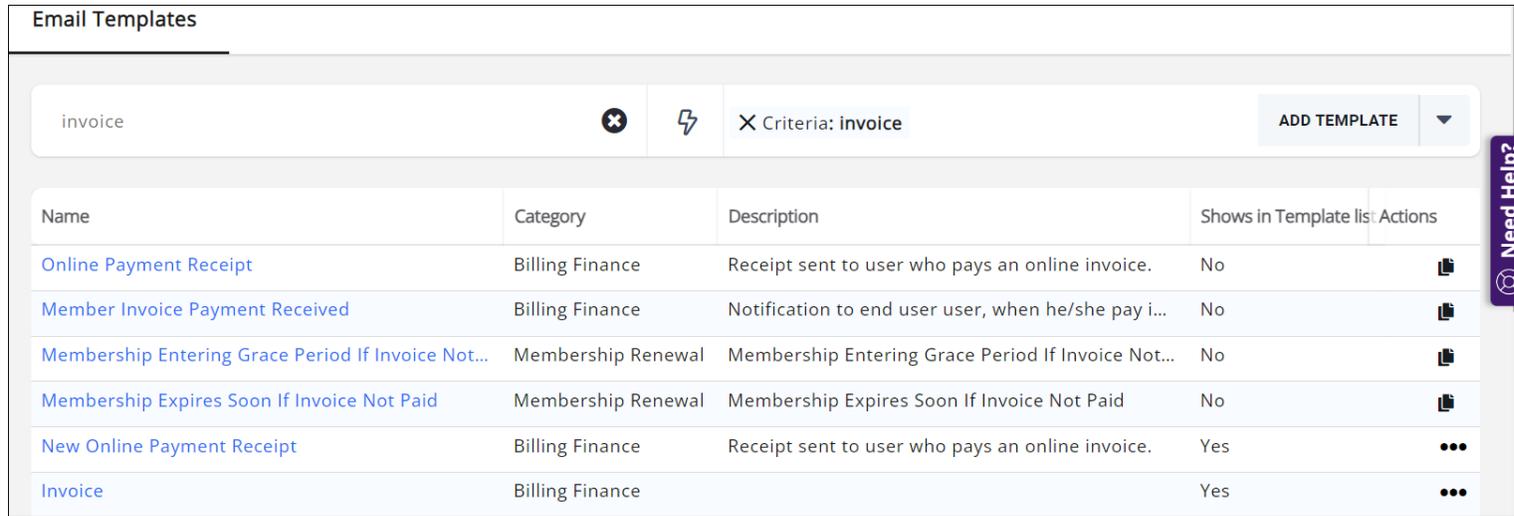
Sale Payment Receipt

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

How To:

Make a Copy/Edit a Default Template

- Rename the copy!
- Subject Line
- Edit your Content
- Add Merge Fields



Name	Category	Description	Shows in Template list	Actions
Online Payment Receipt	Billing Finance	Receipt sent to user who pays an online invoice.	No	
Member Invoice Payment Received	Billing Finance	Notification to end user user, when he/she pay i...	No	
Membership Entering Grace Period If Invoice Not...	Membership Renewal	Membership Entering Grace Period If Invoice Not...	No	
Membership Expires Soon If Invoice Not Paid	Membership Renewal	Membership Expires Soon If Invoice Not Paid	No	
New Online Payment Receipt	Billing Finance	Receipt sent to user who pays an online invoice.	Yes	...
Invoice	Billing Finance		Yes	...

Article: [Create and Manage Email Templates](#)

Merge Fields

When working with merge fields it is important to recognize who the email is being sent to!

- When sending to an individual, for example, fields such as Primary Business are appropriate, but Primary Contact (of an individual) is not, being as an individual can BE a Primary Contact but cannot HAVE a Primary Contact.
- And vice versa- if you are sending an email to a business, Primary Contact would be a valid field, whereas Primary Business would not; a business can BE a Primary Business, but cannot HAVE a primary business

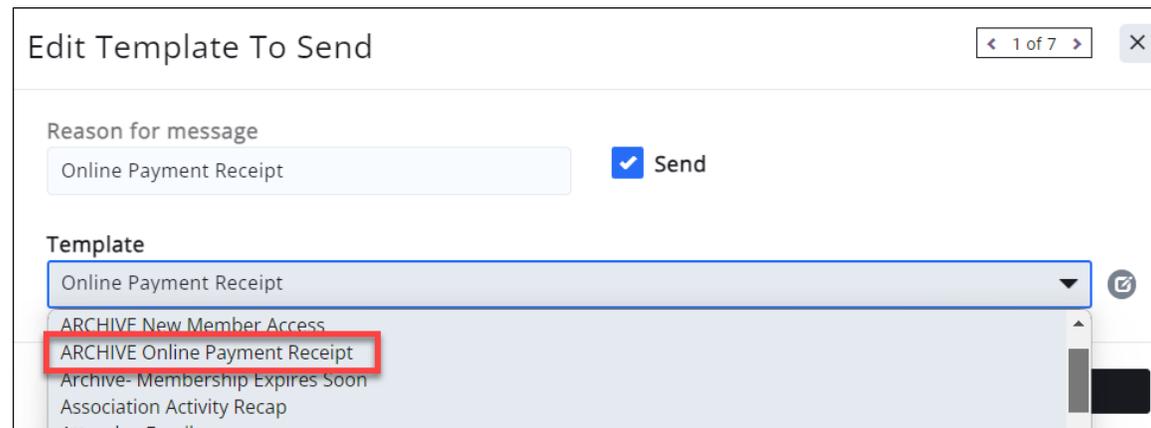
Automated Messaging

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 Online Payment Receipt is only sent out automatically, if you have customized the template, make the needed change in Automated Messaging.

Article: [Automated Messaging](#)



Edit Template To Send < 1 of 7 > ×

Reason for message

Online Payment Receipt Send

Template

Online Payment Receipt

ARCHIVE New Member Access

ARCHIVE Online Payment Receipt

Archive- Membership Expires Soon

Association Activity Recap

Attendee Email

EMAIL DESIGNER

Email Designer Overview

Included with your Marketing Automation module, **Email Designer** provides you the ability to create and design newsletters and email templates.

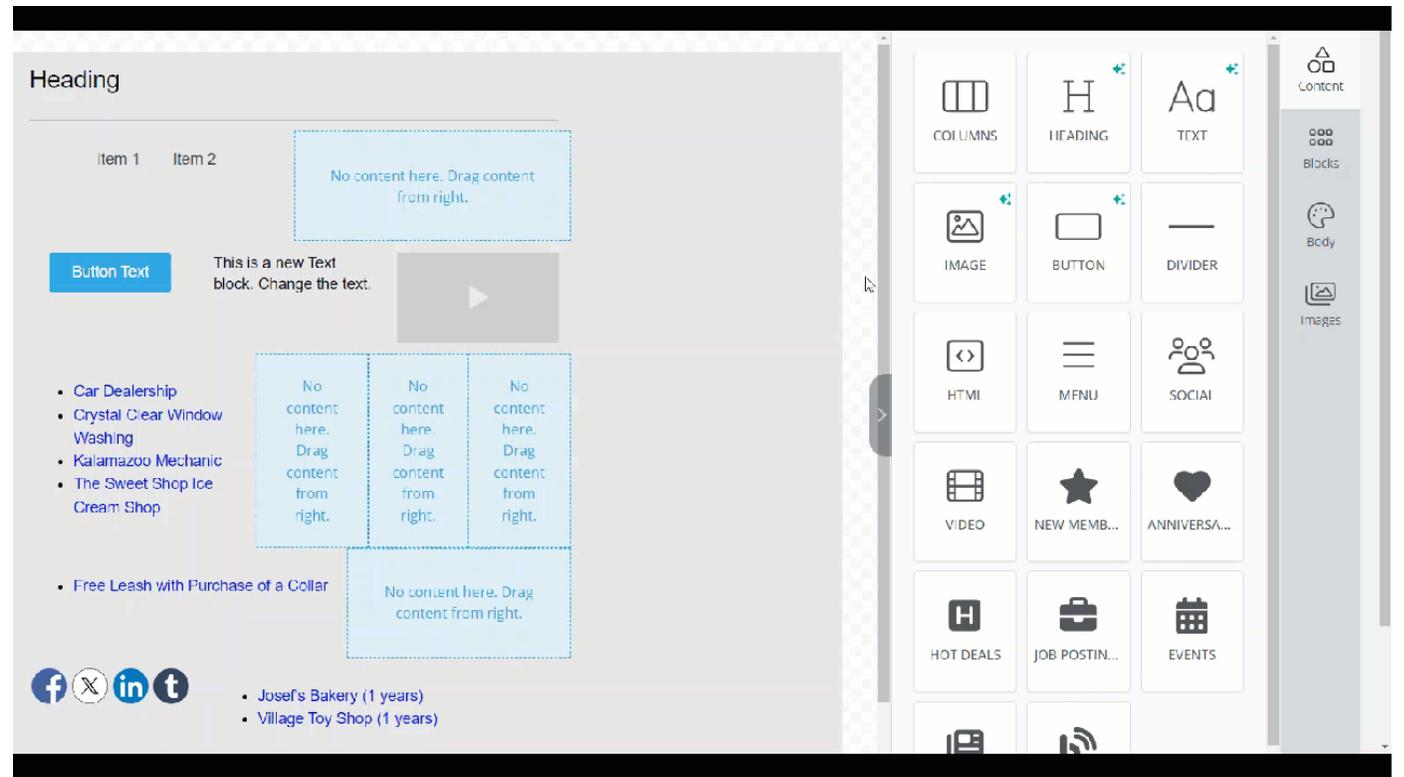
Email Designer is extremely flexible and provides a variety of tools for content elements that populate from your database.

How Does It Work?

Email Designer is a drag-and-drop, “What You See Is What You Get” (WYSIWYG) email editor.

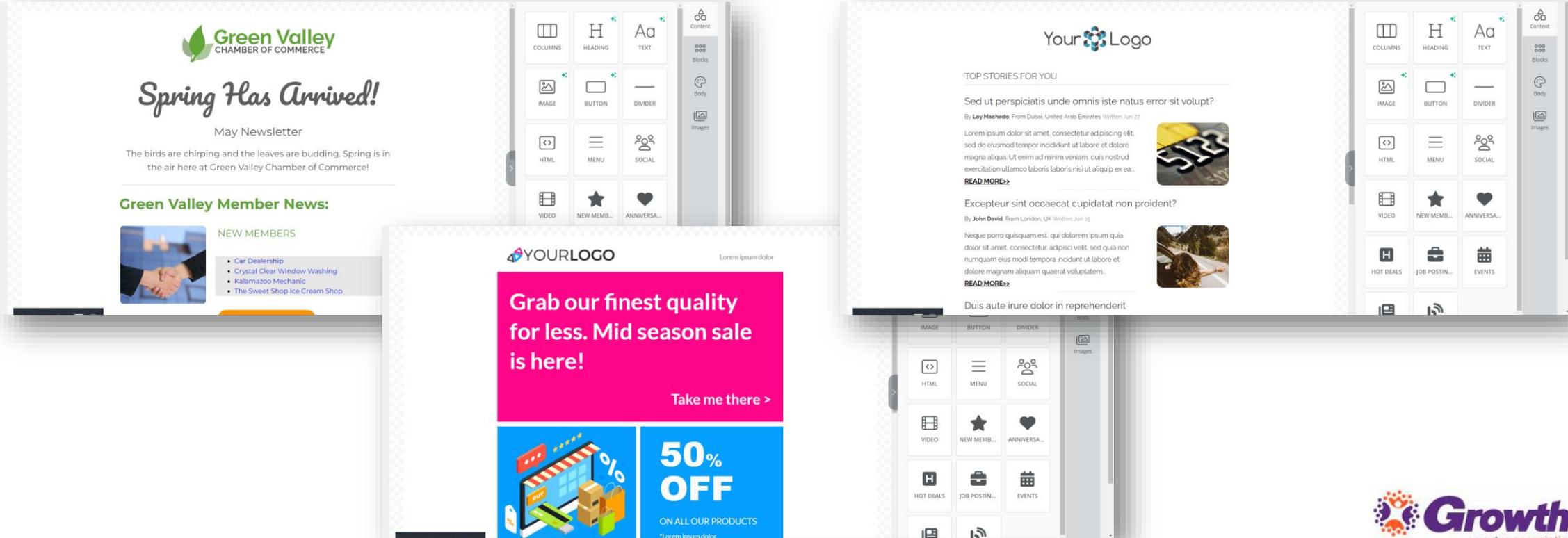
To use it, click and hold the tool you want to use and drag it into the spot you want the content to appear.

It's that simple!



Default Templates

There are several Default Templates you can view and customize.



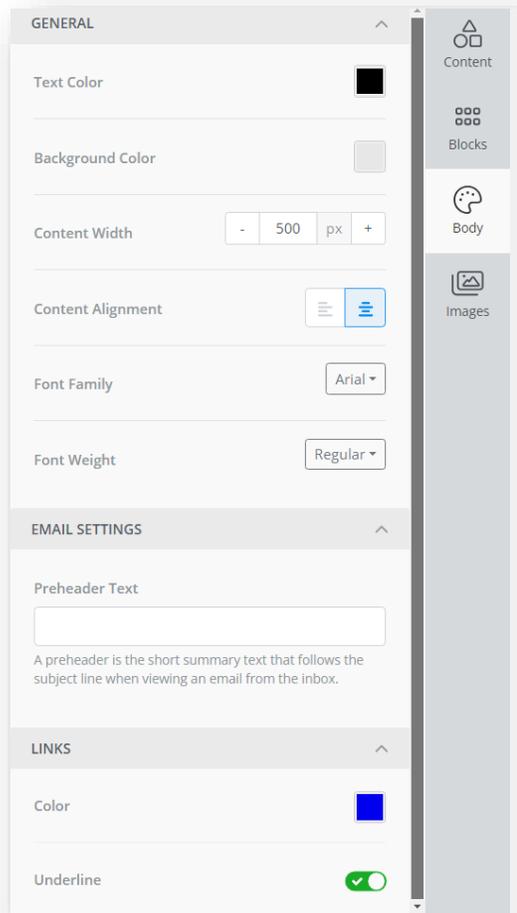
Template Settings

Blocks

Blocks help you define the areas of your template and can divide them into sections; each Block can contain multiple types of content.



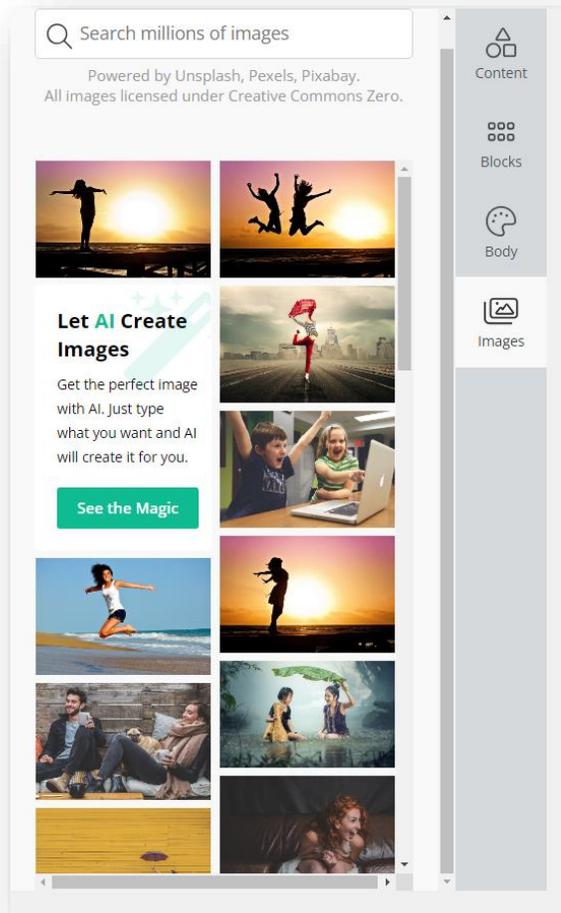
Template Settings



Body

Using the **Body** option, you can define the global settings for your templates, including the width of the template, the background color, default fonts to be used, link color, etc.

Template Settings



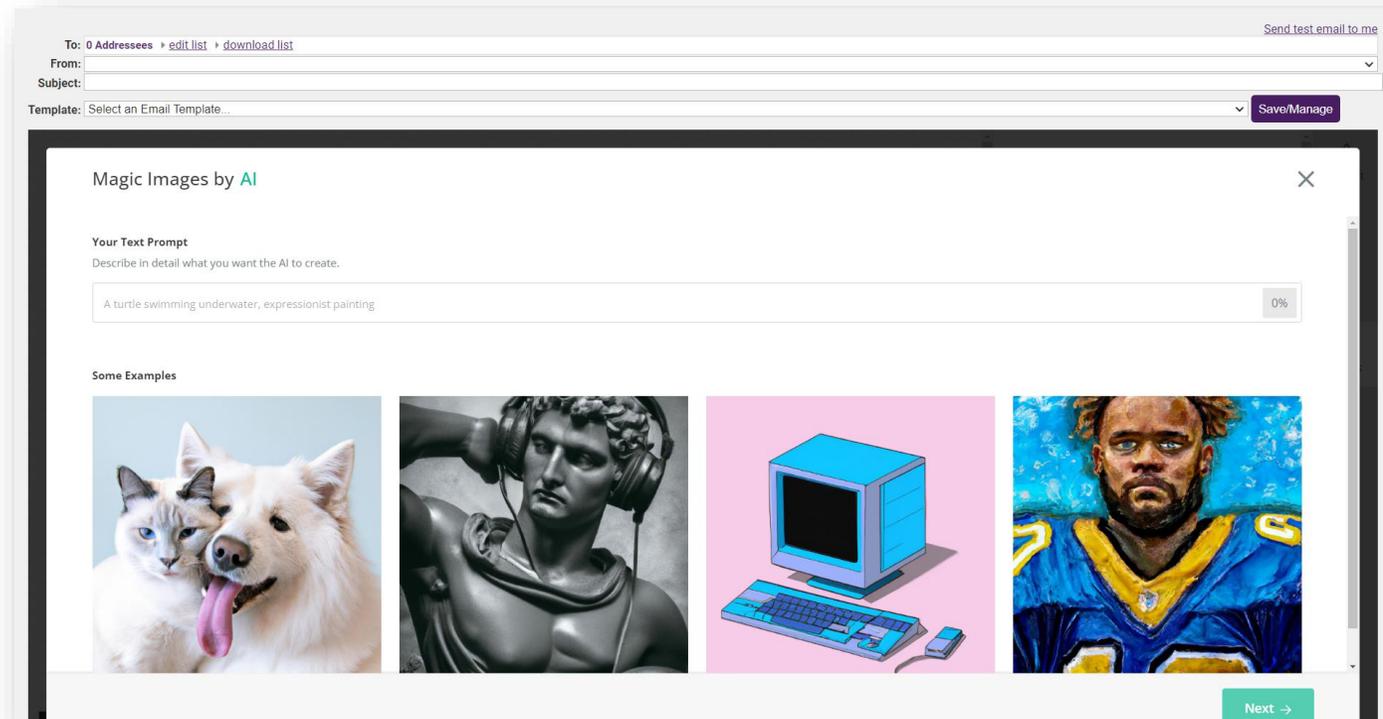
Images

Search and select from an extensive library of Creative Commons stock images

Template Settings

NEW! AI-Created Images!

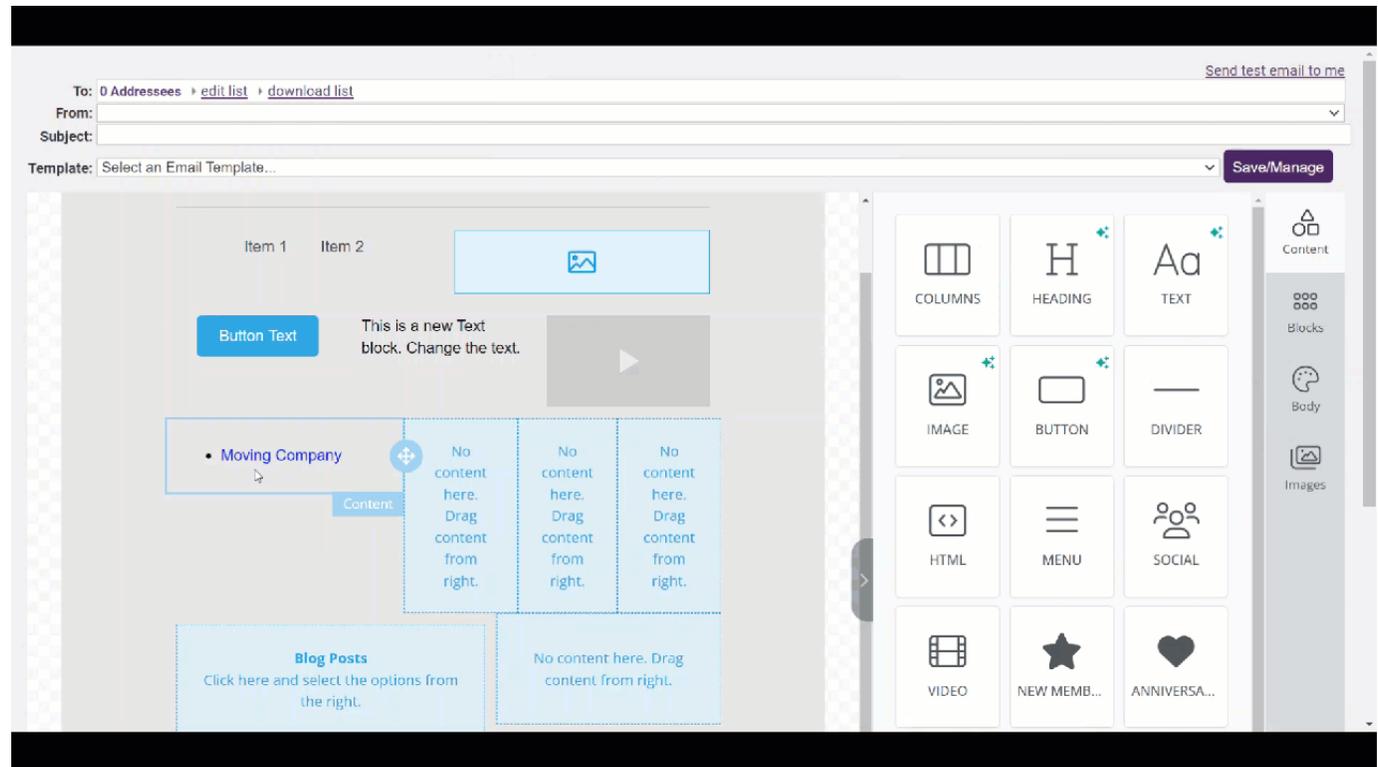
Use the **Magic Images by AI** option to create any image you need.



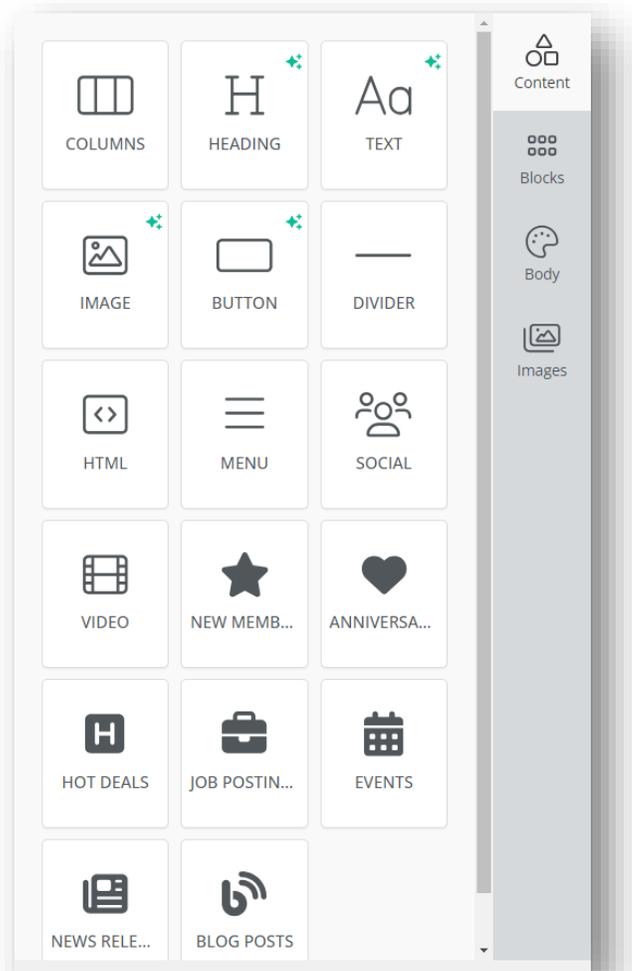
How Does It Work?

Updating Content

When working with content from your database, keep in mind it does not update automatically- for current lists of new members, upcoming events, etc., be sure to **Reload Content** before sending out your newsletter!



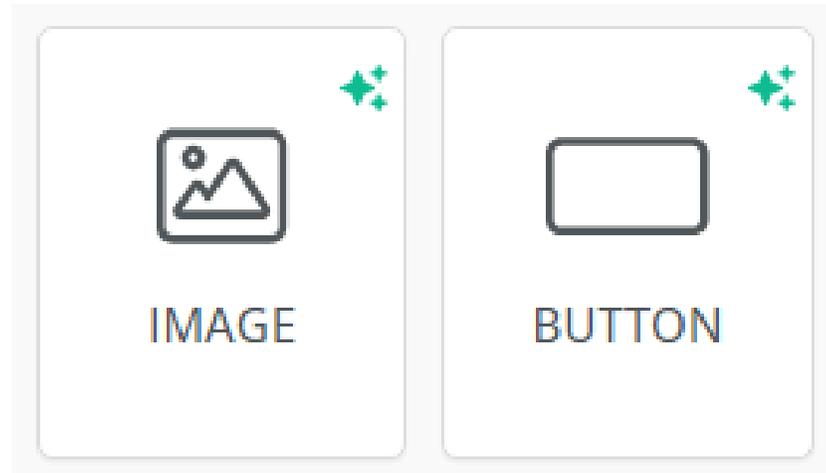
Content Tools



On the Content tab are both standard and custom tools you can use to edit existing content or add new content.

Content Tools

AI functions are now included throughout Email Designer.
Hint: look for the little green sparkles!

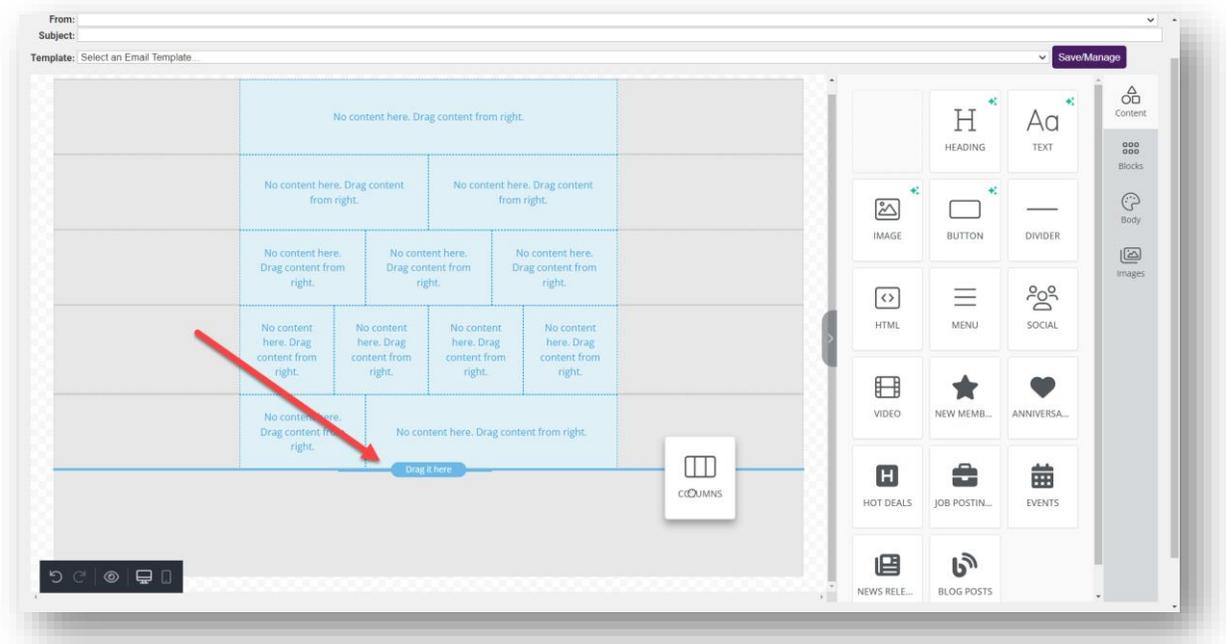


STANDARD TOOLS

Standard Tools

Columns

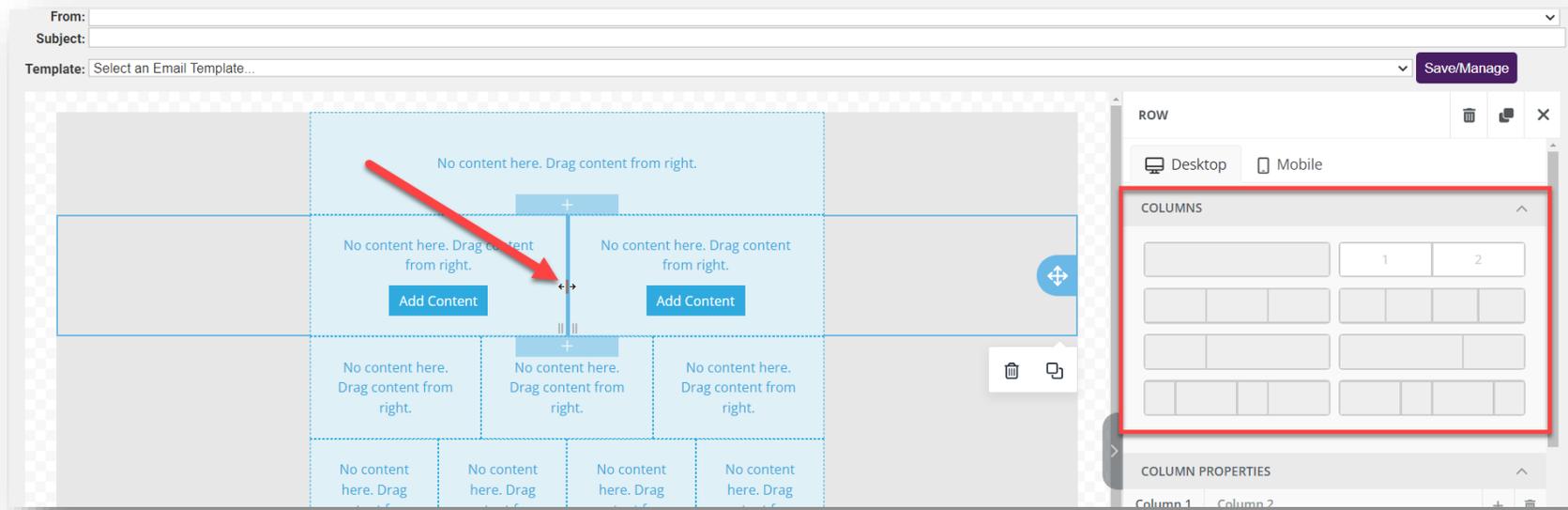
This is essentially the same tool as the **Blocks** option. Click and hold the Columns button, and drag it into place.



Standard Tools

Columns

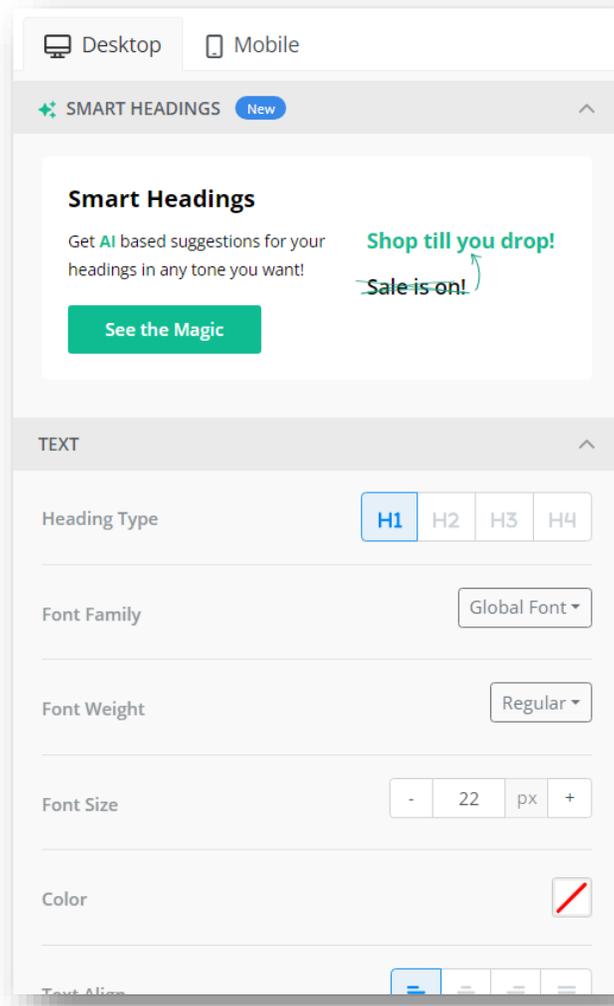
Select the configuration of the row of editable content areas you want, and drag the dividers around to further customize the content areas.



Standard Tools

Heading

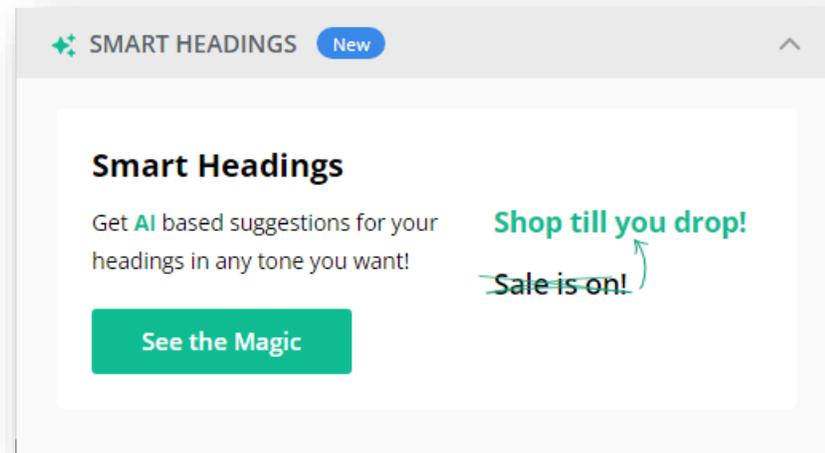
This will drop a text box with preconfigured Heading options into place.



Standard Tools

NEW! Smart Headings!

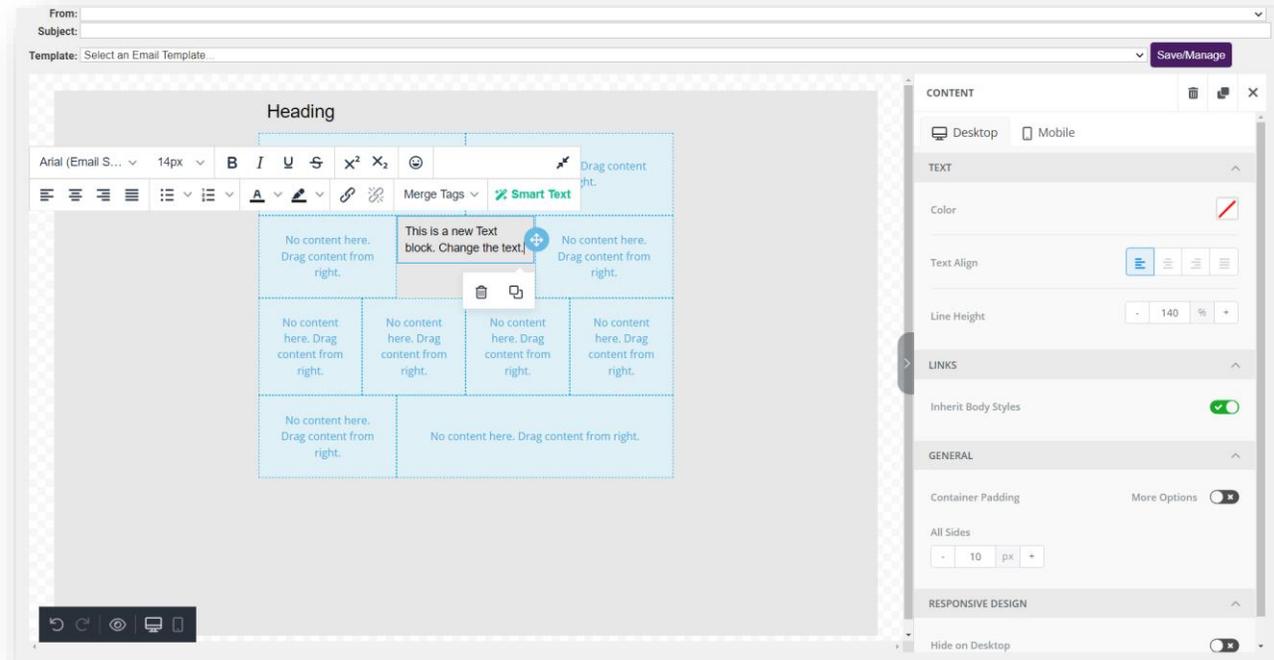
Get AI based suggestions for your headings!



Standard Tools

Text

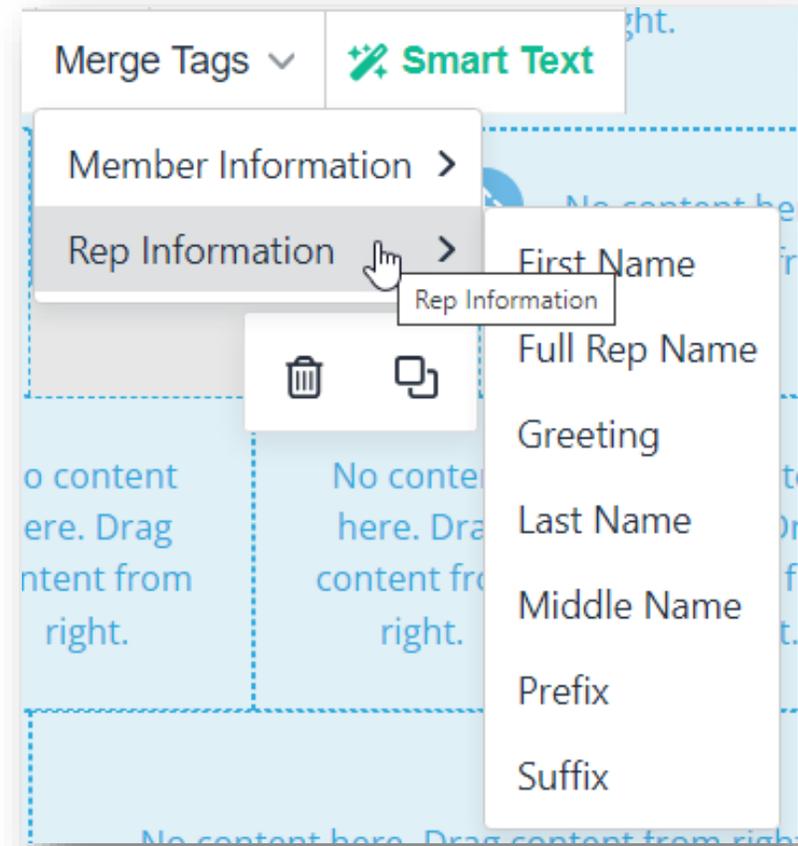
The Text tool allows you to add the text block to your newsletter. Standard word processing functions are available.



Standard Tools

Merge Tags

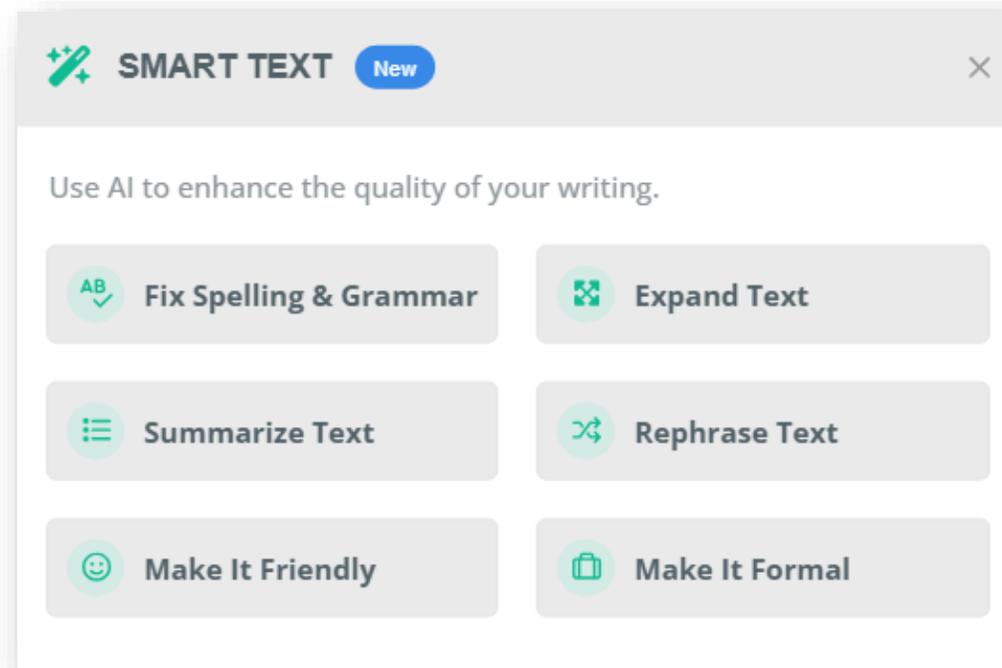
Use Merge Tags to populate text areas with ChamberMaster data such as Member Name and Rep Information.



Standard Tools

NEW! Smart Text!

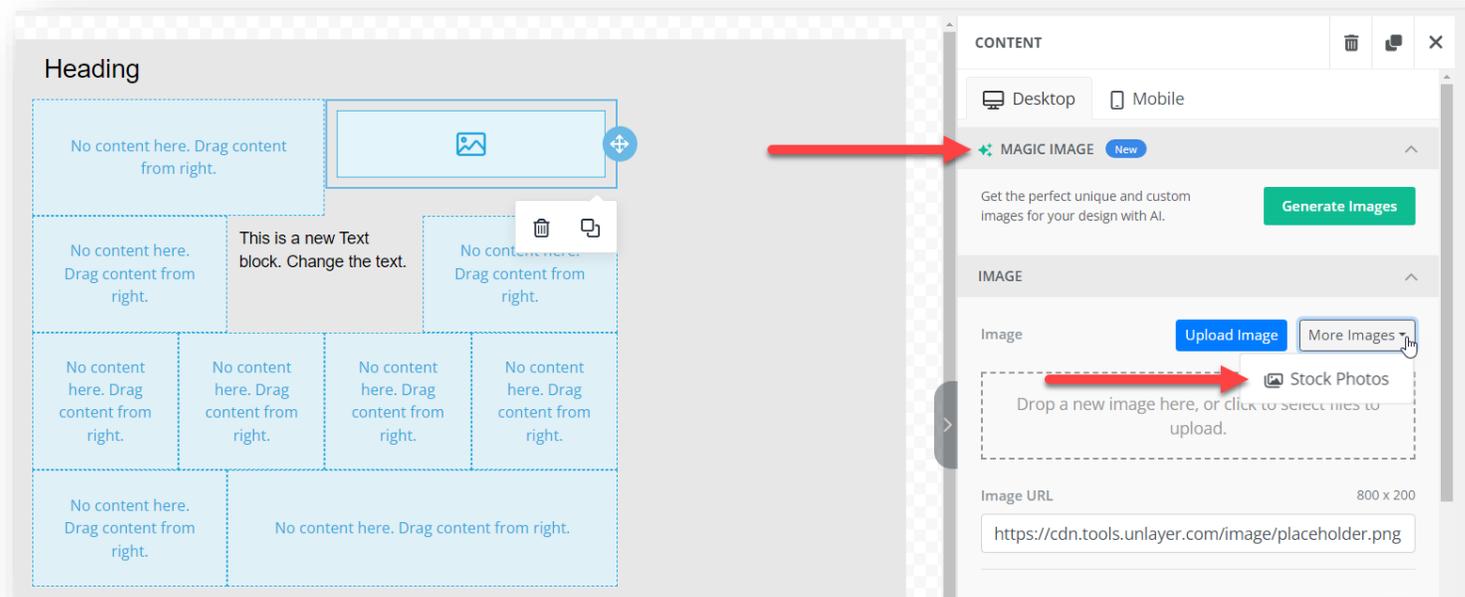
Use AI to enhance the quality of your writing.



Standard Tools

Image

To insert images into your newsletter, drag and drop the Image Tool into one of your content areas. Upload an existing image or access the AI option or Stock photos.



Standard Tools

Button

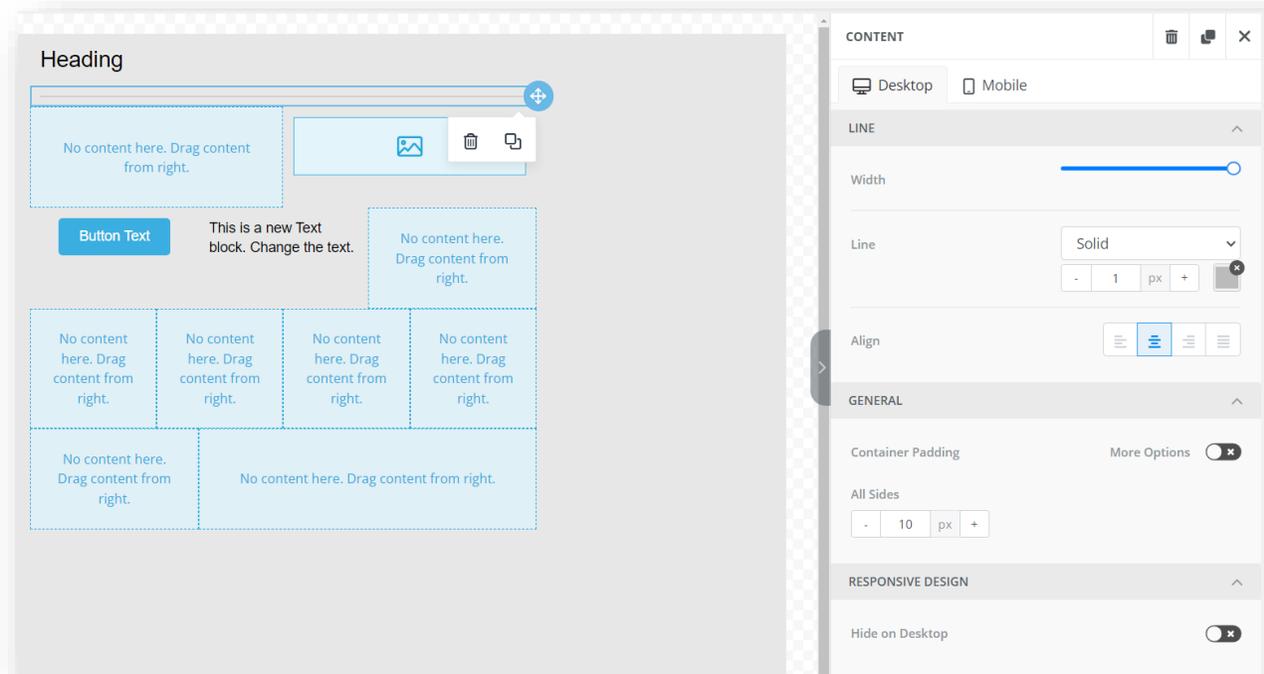
Encourage members to follow links by including attractive clickable buttons. Appearance and behavior are completely customizable.

The image shows a screenshot of a web design tool interface. On the left, a canvas displays a layout with several placeholder boxes containing the text "No content here. Drag content from right." and one button labeled "Button Text". A tooltip above the button reads "This is a new Text block. Change the text." and includes a plus icon. On the right, a "CONTENT" panel is open, showing a "SMART BUTTONS" section with a "New" badge. Below this, there are two example buttons: "See the Magic" (green) and "Claim Your Coupon" (green) with a "Learn More" link. The "ACTION" section below shows "Action Type" set to "Open Website", a "URL" input field, and "Target" set to "New Tab". The "BUTTON OPTIONS" section shows "Text Color" and "Background Color" selection options.

Standard Tool

Divider

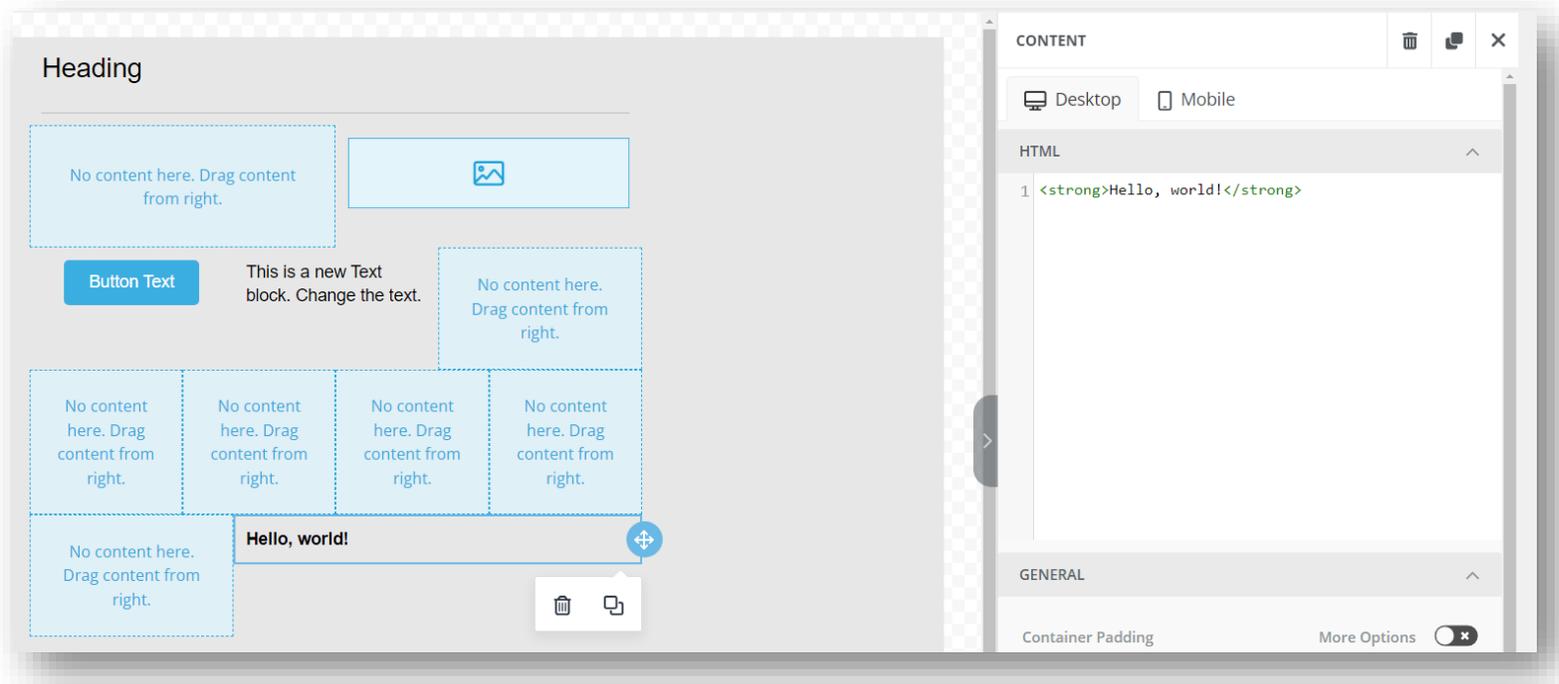
Add stylized horizontal lines to organize content and add visual interest.



Standard Tool

HTML*

Write your own or paste in HTML code in your newsletter.

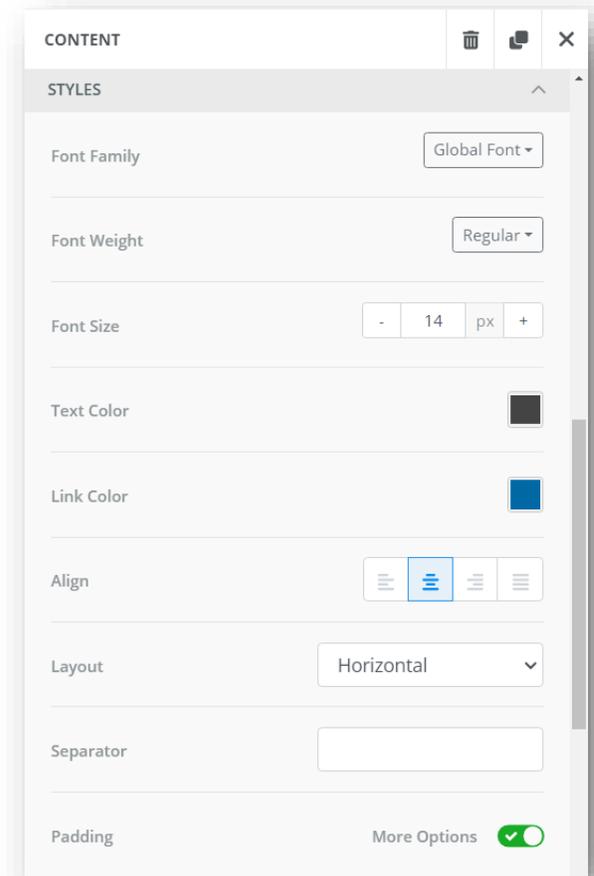
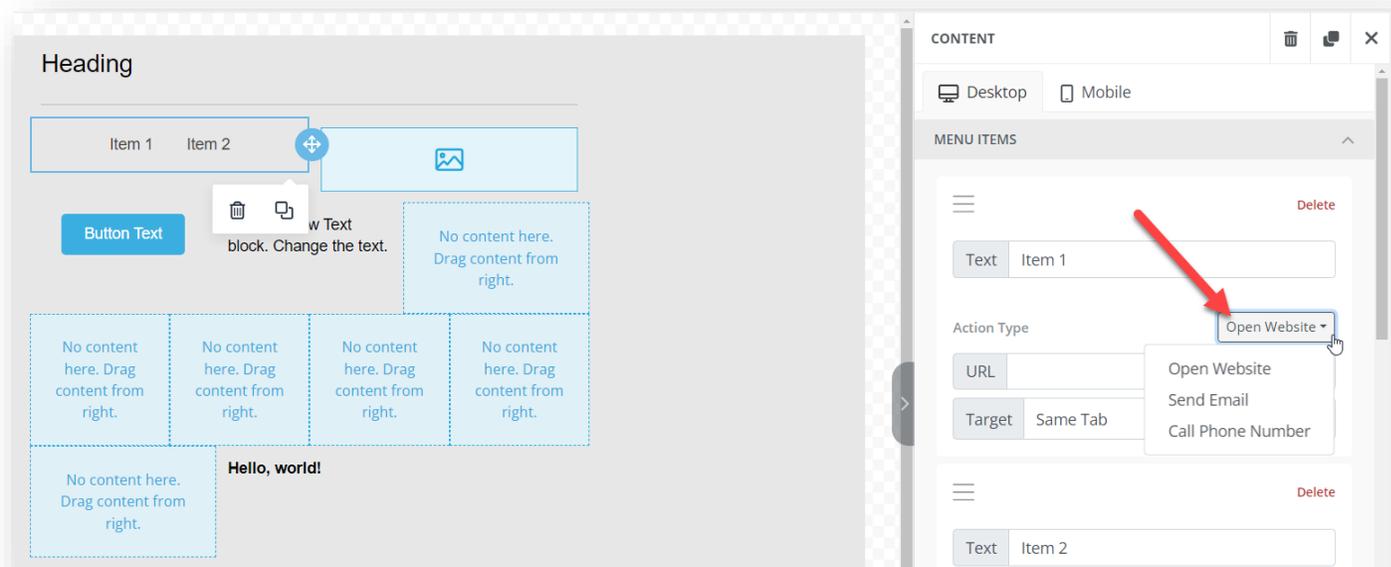


*ChamberMaster does not support troubleshooting this field; use at your own risk.

Standard Tools

Menu

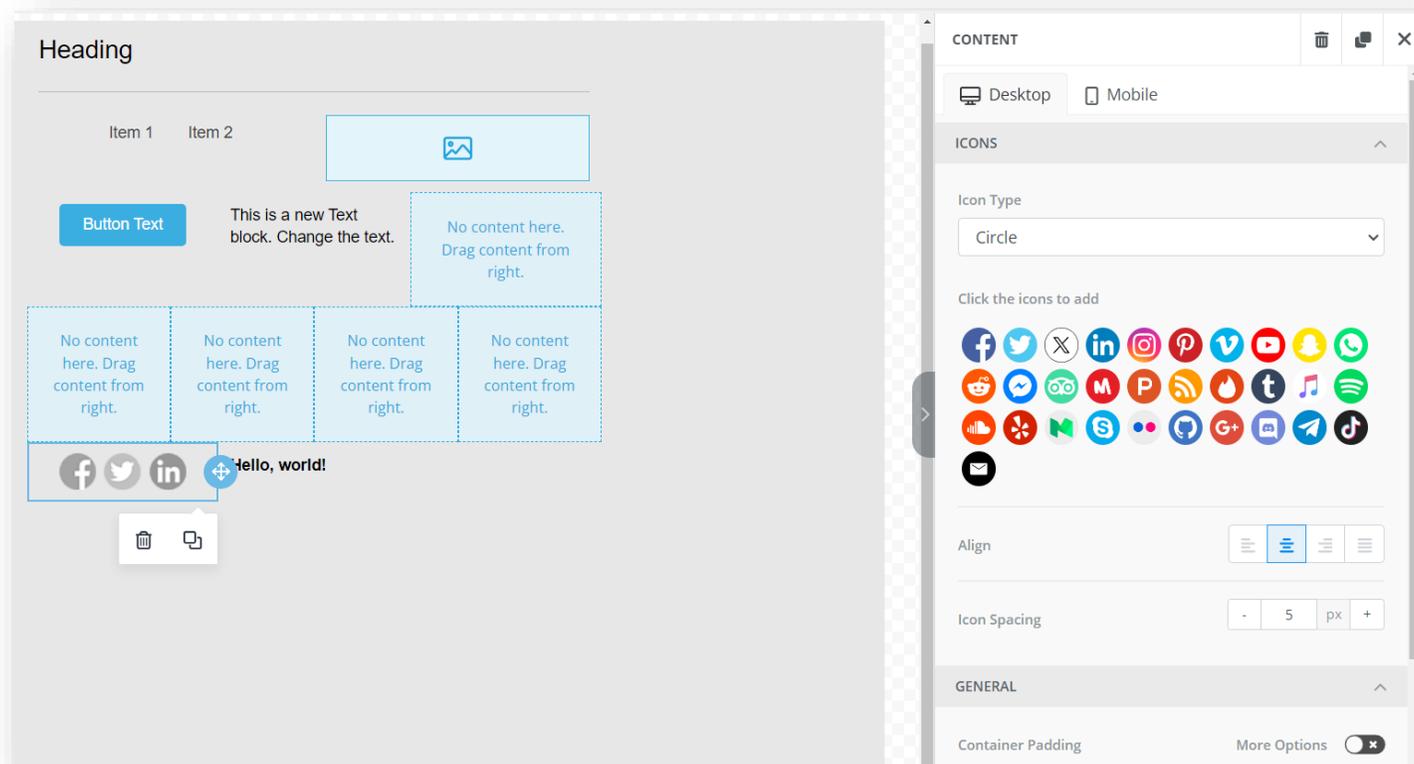
Add menus in your newsletter and select from several behaviors. Colors, fonts, and layout (horizontal or vertical) is all customizable.



Standard Tools

Social

Add links to social platforms with colorful, branded icons.



Standard Tools

Video

Link to a YouTube or Vimeo video in your template.

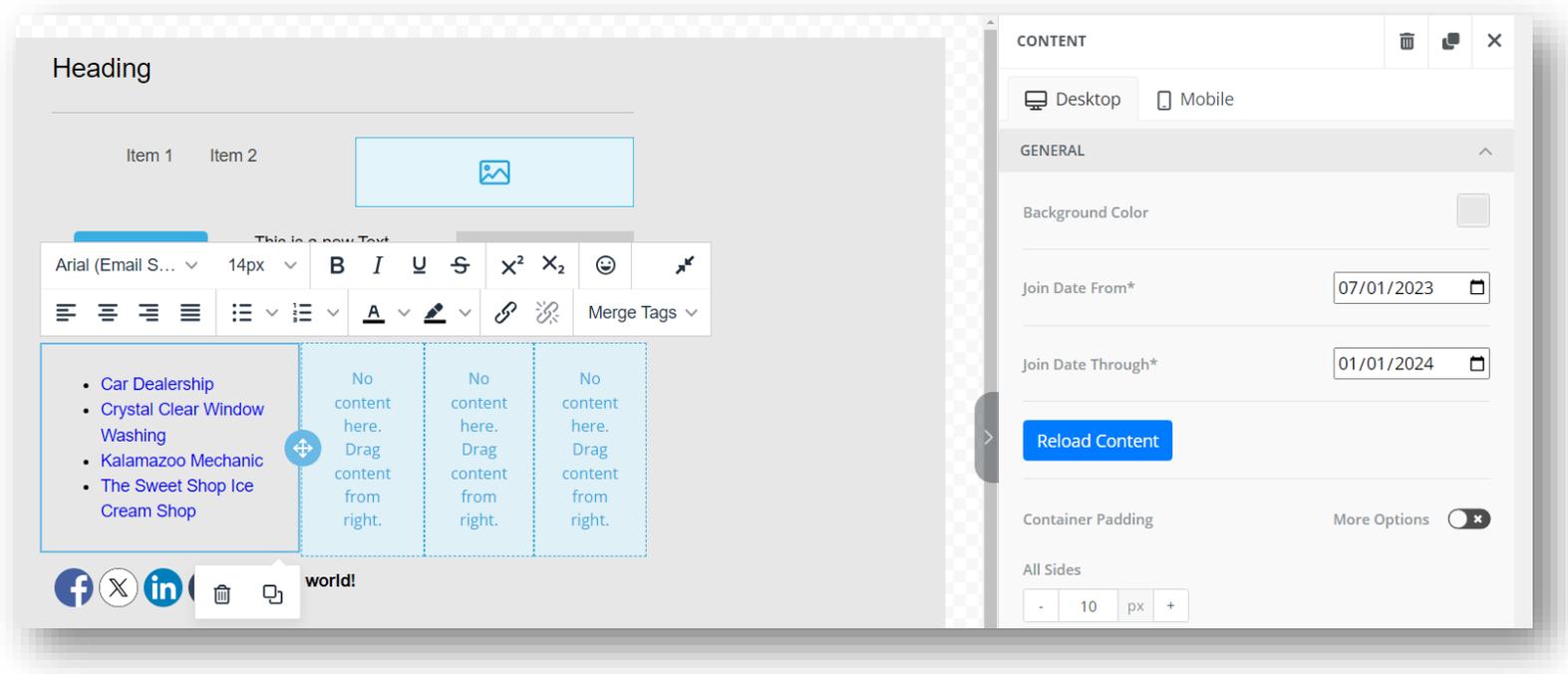
The screenshot displays a web design tool interface. On the left, a preview window shows a template layout with a heading, two items, a button labeled "Button Text", a text block "This is a new Text block. Change the text.", a video player block with a play button, and a grid of four content blocks. At the bottom of the preview are social media icons for Facebook, X, LinkedIn, and Twitter, followed by the text "Hello, world!". On the right, a configuration panel titled "CONTENT" is open, showing "Desktop" and "Mobile" views. The "VIDEO" section contains a "Video URL" input field and a note: "Add a YouTube or Vimeo URL to automatically generate a preview image. The image will link to the provided URL." The "GENERAL" section shows "Container Padding" set to "All Sides" with a value of "10 px" and a "More Options" toggle switch.

CUSTOM TOOLS

Custom Tools

New Members

Use this tool to generate and format a list of new members within a specified date range in your template.



Custom Tools

Anniversary

Use this tool to generate and format a list of members with a specific anniversary month in your template.

The screenshot displays the GrowthZone software interface for the Anniversary tool. On the left, a preview window shows a template layout with a heading, two items, a button, a text block, a video player, and a list of members. The list includes 'Josef's Bakery (1 years)' and 'Village Toy Shop (1 years)'. A rich text editor toolbar is visible over the list. On the right, the 'CONTENT' configuration panel is shown, featuring a 'GENERAL' section with the following settings:

- Background Color: [Color picker]
- Anniversary Month: February (dropdown)
- Years of Membership (min): 1 px
- Years of Membership (max, optional): 0 px
- Show years next to name:

A 'Reload Content' button is located at the bottom of the configuration panel.

Custom Tools

Hot Deals

Add a list of current Public or Member-to-Member Hot Deals

The screenshot displays a web editor interface for configuring a 'Hot Deals' widget. The main editor area shows a preview of the widget with a heading, two items, a button, a text block, a video player, and a list of deals. A rich text editor toolbar is visible below the preview. The right sidebar shows the 'CONTENT' configuration panel with options for Desktop/Mobile view, General settings (Background Color, Active Deals As Of, Type, Include Member Name, Include Deal Dates, Maximum List Size, Order By), and a 'Reload Content' button.

Heading

Item 1 Item 2

Button Text This is a new Text block. Change the text.

• Car Dealership
• Crystal Clear Window Washing

No content here. Drag content from right.

No content here. Drag content from right.

No content here. Drag content from right.

• Free Leash with Purchase of a Collar

No content here. Drag content from right.

• Josef's Bakery (1 years)
• Village Toy Shop (1 years)

CONTENT

Desktop Mobile

GENERAL

Background Color

Active Deals As Of* 01/31/2024

Type Member-to-Member

Include Member Name

Include Deal Dates

Maximum List Size - 10 px +

Order By Hot Deal Title

Reload Content

Custom Tools

Job Postings

Use this tool to generate and format a list of active job postings within a specific date range.

The screenshot displays a web editor interface for creating job postings. The main workspace is divided into two sections: a content area on the left and a settings panel on the right.

Content Area:

- Heading:** A section for the main title.
- Item 1 / Item 2:** Two columns for content.
- Image:** A placeholder for an image.
- Button Text:** A blue button with the text "Button Text".
- Text:** A text block with the placeholder "This is a new Text block. Change the text."
- Video:** A placeholder for a video.
- List:** A bulleted list with items like "Car Dealership", "Crystal Clear Window Washing", "Diephouse Realty - Seeking Landscaping Professional", and "Anthony's on Main - Wait Staff Needed".
- Text Blocks:** Several text blocks with the placeholder "No content here. Drag content from right."
- Rich Text Editor:** A toolbar with options for font (Arial), size (14px), bold (B), italic (I), underline (U), strikethrough (ABC), link (X²), unlink (X₂), and merge tags.
- Footer:** Social media icons for Facebook, X, LinkedIn, and Twitter, along with a copyright notice.

Settings Panel (CONTENT):

- Desktop / Mobile:** Toggle for device view.
- GENERAL:**
 - Background Color:** A color selection box.
 - Active Posts From*:** A date picker set to 07/01/2023.
 - Active Posts Through*:** A date picker set to 01/31/2024.
 - Include Member Name:** A toggle switch that is turned on.
 - Include Category:** A toggle switch that is turned off.
 - Maximum List Size:** A numeric input set to 10, with units in pixels (px).
 - Order By:** A dropdown menu set to "Job Posting Title".
- Reload Content:** A blue button to refresh the content.

Custom Tools

Events

Use this tool to generate and format a list of upcoming events within a specific date range.

The screenshot displays the GrowthZone Custom Tools interface for generating and formatting an event list. The interface is divided into two main sections: a content editor on the left and a configuration panel on the right.

Content Editor (Left):

- At the top, there is a "Button Text" field with the text "This is a new Text block. Change the text." and a play button icon.
- Below this, there is a list of event categories: "Car Dealership", "Crystal Clear Window Washing", "Young Professionals Weekly Lunch", "Business After Hours Event", "Main Street Tree Lighting", "Weekly Trivia Night", "Coffee with the Mayor", "Blood Drive", "Board Meeting", and "Test Event".
- A rich text editor toolbar is visible, including options for font face (Arial), size (14px), bold (B), italic (I), underline (U), strikethrough (ABC), link (X²), unlink (X₂), and a "Merge Tags" dropdown.
- There are three placeholder boxes with the text "No content here. Drag content from right." and a blue plus icon for adding content.
- At the bottom left, there are social media icons for Facebook, X, LinkedIn, and Twitter.

Configuration Panel (Right):

- The panel is titled "CONTENT" and has a "Desktop" and "Mobile" view selector.
- The "GENERAL" section includes:
 - "Background Color" with a color picker.
 - "Event Category" with a dropdown menu set to "All Categories".
 - "Start Date From*" with a date picker set to "01/01/2024".
 - "Start Date Through*" with a date picker set to "01/31/2024".
 - "Include Event Date(s)" with a toggle switch that is currently turned on.
 - "Maximum List Size" with a numeric input field set to "10" and "px" units.
 - "Order By" with a dropdown menu set to "Event Date".
- A "Reload Content" button is located at the bottom of the panel.

Custom Tools

News Releases

Use this tool to generate and format a list of recent news releases within a specific date range.

The screenshot displays the News Releases tool interface, divided into two main sections: a content editor on the left and a settings panel on the right.

Content Editor (Left):

- At the top, there are two placeholder items labeled "Item 1" and "Item 2".
- Below these is a blue button labeled "Button Text" and a text block containing "This is a new Text block. Change the text." followed by a play button icon.
- A list of categories is shown: "Car Dealership", "Crystal Clear Window Washing", and "Kalamazoo County visitor spending hits all-time high of \$585 million".
- Three placeholder boxes with the text "No content here. Drag" are visible.
- A rich text editor toolbar is present with options for font (Arial), size (14px), bold (B), italic (I), underline (U), strikethrough (ABC), link (X²), unlink (X₂), and other formatting tools.
- At the bottom, there are social media icons for Facebook, X, LinkedIn, and Twitter, along with a "Hello, world!" text.

Settings Panel (Right):

- The panel is titled "CONTENT" and has a close button (X).
- It features a toggle for "Desktop" and "Mobile" views.
- The "GENERAL" section includes:
 - "Background Color" with a color picker.
 - "Type" set to "All Types".
 - "Releases Active On*" set to "01/31/2024".
 - Toggles for "Include Member Name" and "Include Release Date", both currently turned off.
 - "Maximum List Size" set to "10 px".
 - "Order By" set to "Title".
- A blue "Reload Content" button is located at the bottom of the panel.

Custom Tools

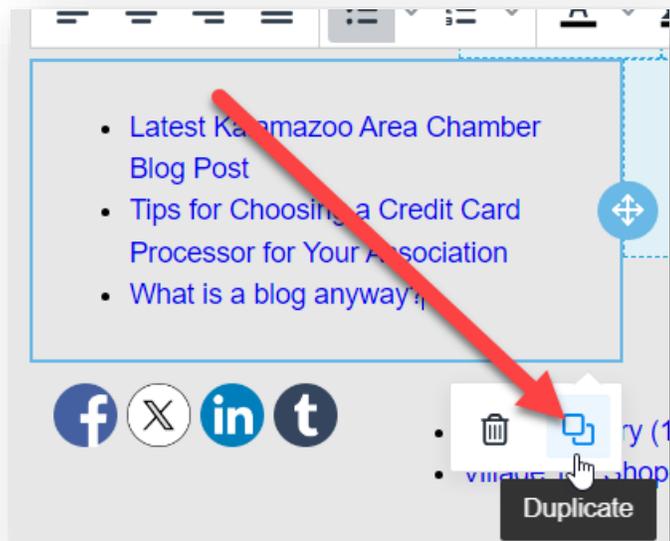
Blog Posts

Use this tool to generate and format a list of recent blog posts within a specific date range.

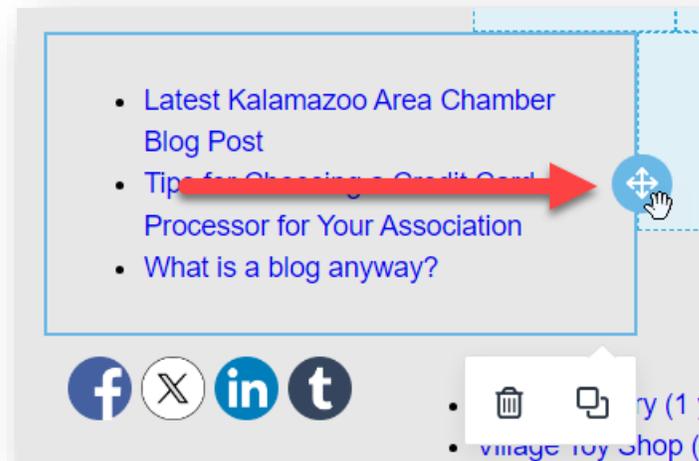
The screenshot displays a web design tool interface. On the left, a preview of a blog post layout is shown. It includes a header with 'Item 1' and 'Item 2', a blue 'Button Text' block, a text block with the placeholder 'This is a new Text block. Change the text.', a video player, and a list of items: 'Car Dealership', 'Crystal Clear Window Washing', 'Latest Kalamazoo Area Chamber Blog Post', 'Tips for Choosing a Credit Card Processor for Your Association', and 'What is a blog anyway?'. Below the list are social media icons for Facebook, X, LinkedIn, and Twitter, and a footer with 'Hello, world!'. A rich text editor toolbar is visible above the list, featuring options for font face (Arial), size (14px), bold, italic, underline, strikethrough, link, unlink, and merge tags. On the right, a 'CONTENT' configuration panel is open, showing settings for 'Desktop' and 'Mobile' views. The 'GENERAL' section includes a 'Background Color' selector, a 'Blog' dropdown menu set to 'Kalamazoo Area Blog Post', 'Posts From*' and 'Posts Through*' date pickers (both set to 01/31/2023 and 01/31/2024 respectively), 'Include Post Date' and 'Include Post Summary' toggle switches (both checked), a 'Maximum List Size' input field set to 10, and an 'Order By' dropdown menu set to 'Post Title'.

Common Tasks

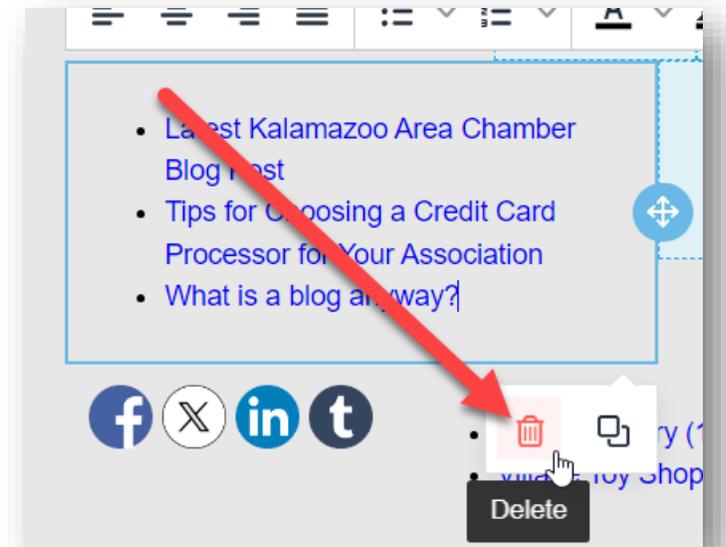
Copy or Duplicate a Content Block



Move a Content Block

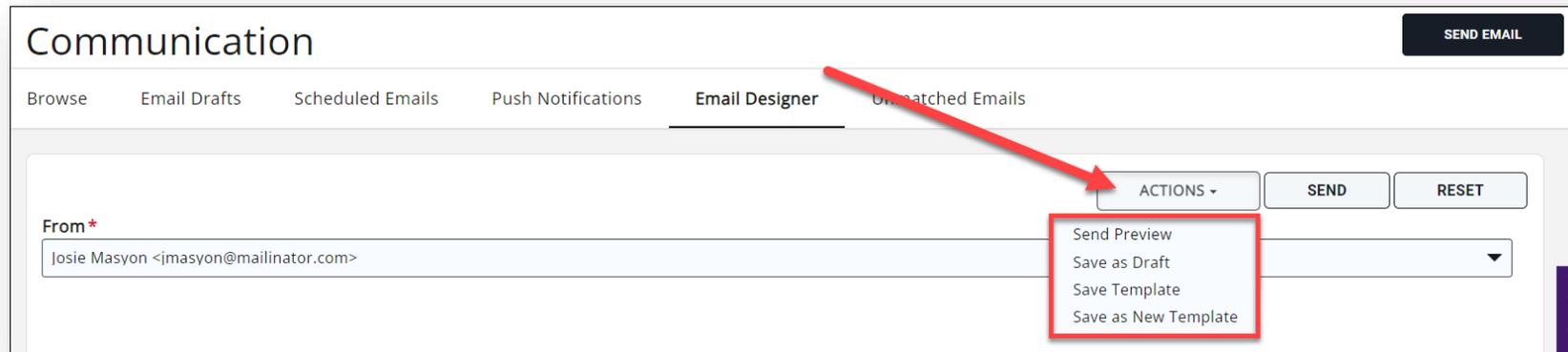


Delete a Content Block



Saving Your Work

Use the **Actions** button and select your option:



- **Send Preview:** this sends a “test” message to a selected contact
- **Save as Draft:** saves the message so you can come back and finish it later
- **Save as Template:** saves the changes you made to the existing/selected template
- **Save as New Template:** this creates a new template in the system

Sending Your Newsletters

1. Open the template/draft of the newsletter
2. Make any changes as needed
3. Send a preview to yourself or another staff member for proofreading (optional, but recommended)
4. Use the **Send** button to send the newsletter

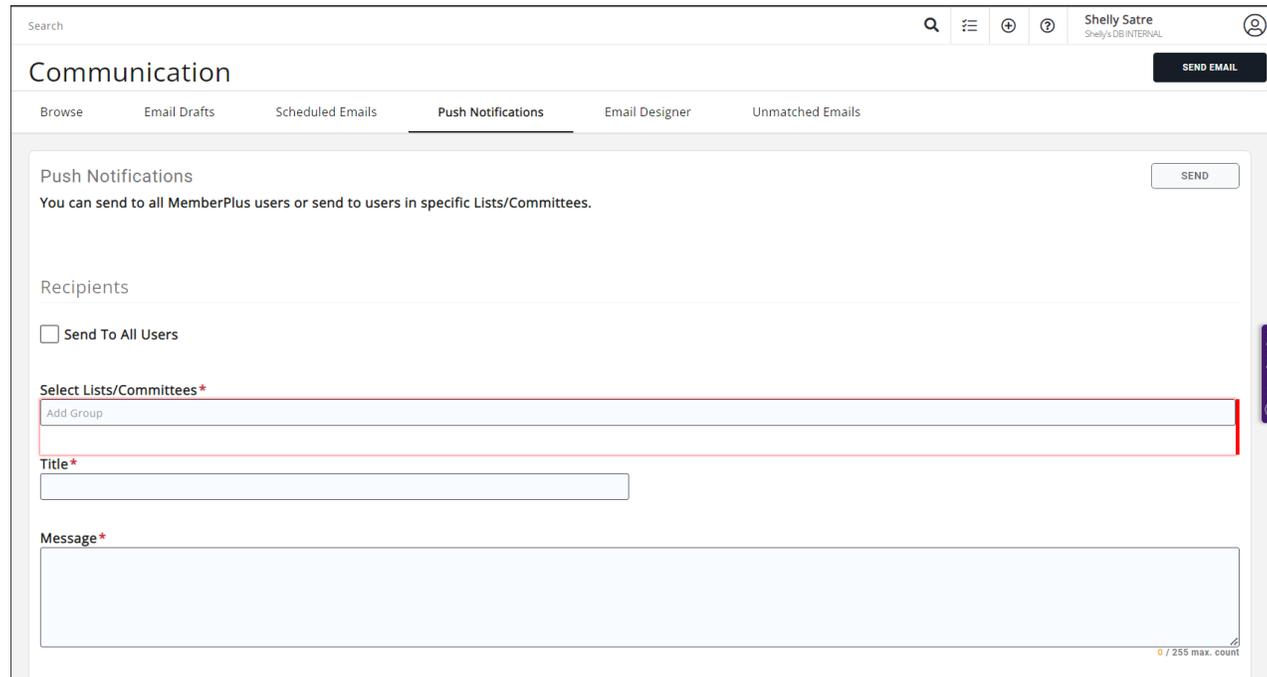


The screenshot shows a web interface for managing communications. At the top, there is a 'Communication' header with a 'SEND EMAIL' button on the right. Below the header is a navigation bar with tabs: 'Browse', 'Email Drafts', 'Scheduled Emails', 'Push Notifications', 'Email Designer' (which is the active tab), and 'Unmatched Emails'. In the main content area, there is a 'From*' field containing 'Josie Masyon <jmasyon@mailinator.com>'. To the right of this field are three buttons: 'ACTIONS -', 'SEND', and 'RESET'. A red arrow points from the 'SEND' button towards the right side of the screen.

PUSH NOTIFICATIONS

Push Notifications

You can easily send notifications to those members who have downloaded the [MemberPlus app](#). You can choose to notify members of a list/committee, or all users.

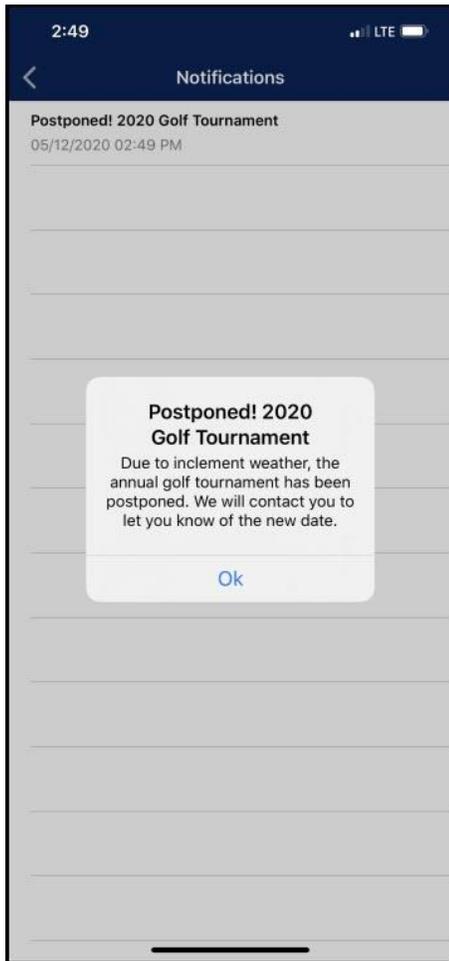


The screenshot shows the 'Communication' section of the GrowthZone software interface. The user is logged in as 'Shelly Satre' (Shelly@DB.INTERNAL). The 'Push Notifications' tab is selected, and a 'SEND EMAIL' button is visible in the top right. Below the navigation tabs, there is a 'SEND' button. The main content area contains the following fields:

- Recipients:** A checkbox labeled 'Send To All Users' is currently unchecked.
- Select Lists/Committees*:** A text input field with a red border and a red asterisk, containing the placeholder text 'Add Group'.
- Title*:** A text input field with a red asterisk.
- Message*:** A large text area with a red asterisk. A character count '0 / 255 max. count' is visible at the bottom right of the text area.

A vertical 'Need Help?' button is located on the right side of the form.

Push Notifications



Members with notifications enabled (on their device AND for the app) will receive a popup notification.

If notifications are not enabled, all push notifications are also visible once logged into the MemberPlus app.

Article: [Send a Push Notification](#)

LIST/COMMITTEE SETUP

Create List/Committee

Add new list/committee

- Simplify communication by grouping contacts

Categorize list/committee

Allow members/public to automatically join lists/committees

- Maintain clean email lists
- Make joining easy

Synchronize to authorized third-party newsletter solution

- Constant Contact
- MailChimp

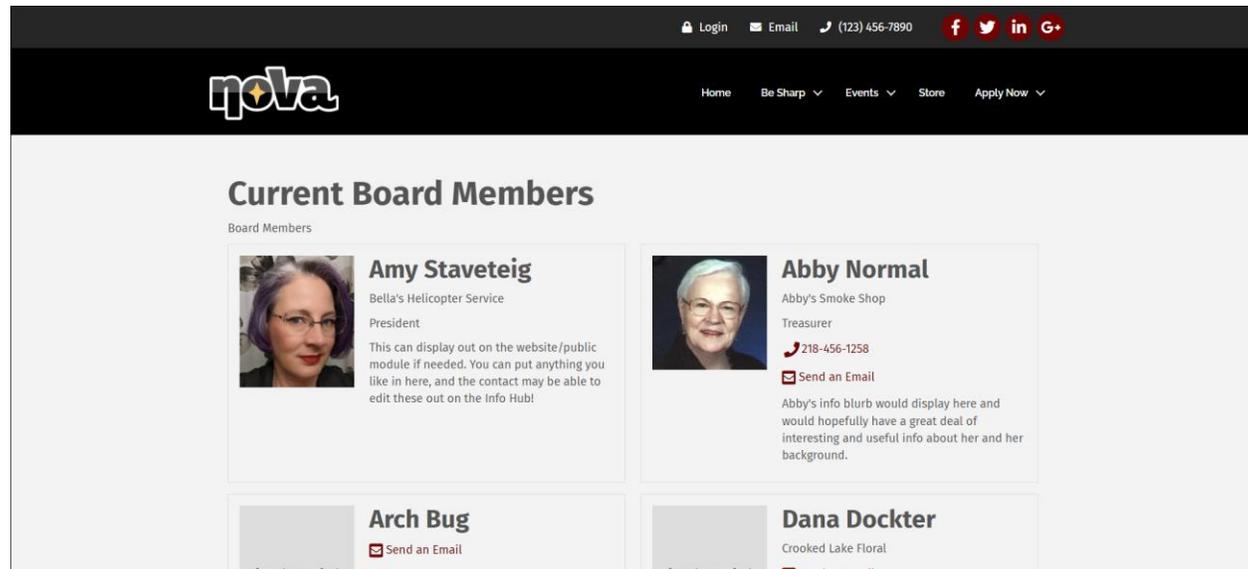
The screenshot shows a web form titled "Add List/Committee" with a close button in the top right corner. The form is organized into several sections:

- Name***: A text input field.
- Category***: A dropdown menu with a plus sign to its right.
- Established On**: A date picker icon.
- Show When Unsubscribing**: A checked checkbox.
- Description**: A large text area.
- Meeting Time Description**: A text area.
- Sponsor**: A text input field with a search icon.
- Default Term (Months)**: A text input field.
- General Settings**: A section containing three checkboxes: "Is Active" (checked), "Synchronize Contacts" (unchecked), "Disallow Opt Out" (unchecked), and "Users Can Contact" (unchecked).
- Public Display Options**: A section containing two checkboxes: "Public Allowed to View List" (unchecked) and "Public Can Join" (unchecked).

At the bottom right of the form are two buttons: "Cancel" and "Done".

Display List Publicly

You can use the list/committee functionality to create a webpage of any contact list in your database.



Article: [Use Case: Publish Your List of Board Members](#)

SMART LISTS

Smart Lists

Contacts on list continuously updated based on report criteria

Automatically updates on nightly basis

- Ensures list/committee roster is current
- List responsive to data in your database

Use any saved report to populate contact list of any active list/committee

The screenshot shows the configuration page for an email list. The title is 'All Members Email List'. There are tabs for 'General', 'Contacts', 'Communication', 'Events', 'Files', and 'Import'. The 'General' tab is active. The form includes fields for 'Name*' (All Members Email List), 'Category*' (Email Lists), 'Established On' (with a calendar icon), and a checkbox for 'Show When Unsubscribing'. There are also text areas for 'Description' and 'Meeting Time Description'. Below these are 'Sponsor' (with a search icon) and 'Default Term (Months)'. A 'General Settings' section contains checkboxes for 'Is Active' (checked), 'Synchronize Contacts' (unchecked), and 'Disallow Opt Out' (unchecked). At the bottom, a red box highlights the 'Synchronize Nightly with Report' section, which has a dropdown menu currently showing 'New Members 2023'.

Smart Lists

To create a Smart List:

- Set up the Report to return your desired result set of contacts.
- Save the Report
- Add to List
 - Create New List
 - Sync to the Report

Article: [Smart List - Dynamically Update Contacts in Lists/Committee from Report Results](#)

MANAGING UNSUBSCRIBES

Managing Unsubscribes

When you send out emails to your lists/committees or send mass emails, the unsubscribe message you have configured in your settings is appended to those emails. A recipient can set restrictions on the use of the email by clicking the link included in the message.

Unsubscribe Message

Unsubscribe message
automatically included in bulk communication

- Customize for your organization

Provides options for future communication:

- Continue receiving emails
- Unsubscribe from group
- Restrict emails to only transactional (i.e., invoices, event confirmations, etc.)
- Update preferences themselves

Welcome to the Elizabeth's Sandbox! We are so grateful to have you as a part of this important organization. Our entire focus is to support your needs. As you start to become familiar with Elizabeth's Sandbox and its benefits, you may have questions or ideas, and we want to hear from you. So, let's start by introducing you to the Elizabeth's Sandbox staff who are always eager to help you.

- Perry Scope, Executive Director
- Patty O'Furniture, Membership Director

Over the next few weeks and throughout your first year as a member, we will be sending you periodic tips, information, and resources to help you make the most of your membership and your mission.

A great place to start is by following us on our various channels, ensuring you always have the latest and greatest information.

Again, thank you! We look forward to partnering with you.
Have a fantastic day,

Elizabeth Diephouse



This email was sent on behalf of Elizabeth's Sandbox located at 123 First Street, Kalamazoo, MI 49006. [To unsubscribe click here.](#) If you have questions or comments concerning this email contact Elizabeth's Sandbox at kalamazoochamber@mailinator.com.

Unsubscribe Process/Options

By clicking the link, the recipient can select from the following options:

Business Spotlight

Email Subscriptions for cheri.petterson@growthzone.com

- Continue receiving email from Cheri's Sandboxes (INTERNAL)
- Unsubscribe me from Business Spotlight
- Do not email me at this address except for transactional emails
- Update my preferences

Submit

Unsubscribe Process/Options

- **Continue Receiving Emails from {Your Organization Name}**
- **Unsubscribe me from {Group Name}**
- **Do not email me at this address except for transactional emails:** If this option is selected, the email will be marked as **Only Transactional Emails**. This ensures that the recipient does not receive any mass emails (including from your lists/committees as well as any mass emails you may be sending). However, any "transactional" type emails that you send (invoices and event confirmations) will continue to be sent. This will unsubscribe the member from **ALL group communication**. The recipient is **NOT** removed from the group.
- **Update my preferences:**

Unsubscribe Process/Options

Business Spotlight

Email Subscriptions for cheri.petterson@growthzone.com

- Continue receiving email from Cheri's Sandboxes (INTERNAL)
- Unsubscribe me from Business Spotlight
- Do not email me at this address except for transactional emails
- Update my preferences

Groups/Lists Subscriptions

Select what Groups / Lists you want to be a member of.

Email Lists

- Ind Contacts
- Gold Membership
- Gold Membership
- Event Volunteers
- Workflow List
- AA Individual Member List
- CP List Group

Email List

- Education Group

Member Engagement

- eNewsletter
- Business Spotlight

Submit

The recipient may deselect the check-boxes for the groups they no longer wish to be subscribed to. The recipient will be marked as Do Not Contact within the group, but will NOT be removed from the group.

Unsubscribed List/Committee Contacts Report

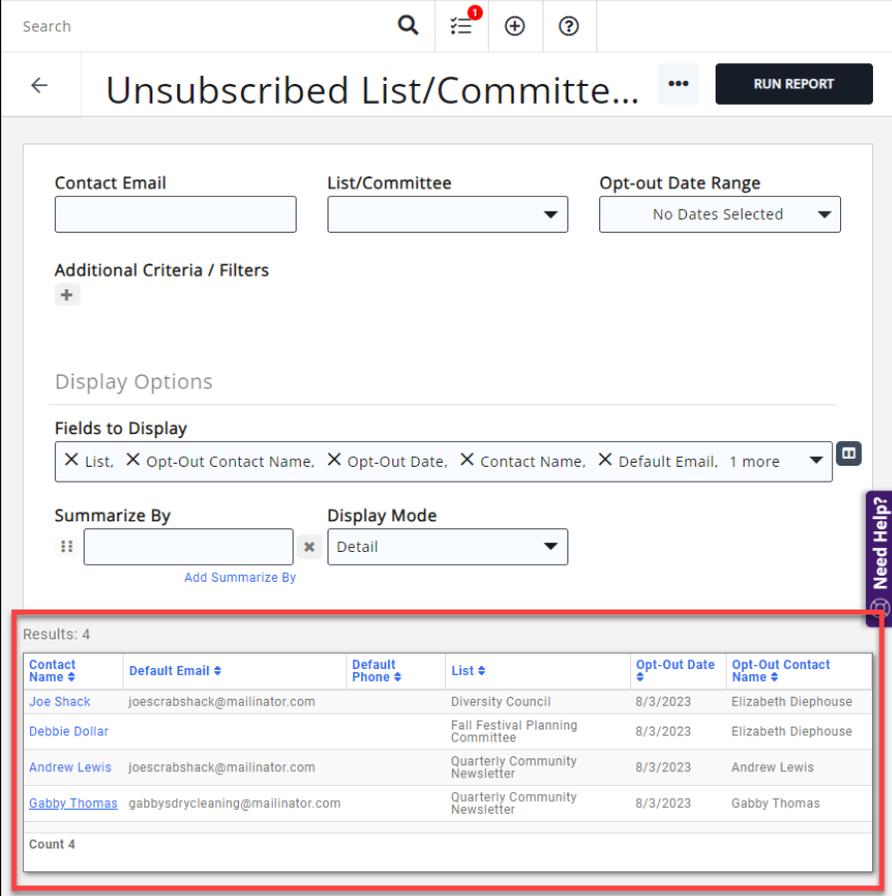
Lists currently unsubscribed members

Provides Opt-out date

Displays contact who unsubscribed

- Staff or member

Good troubleshooting report if member not receiving group communications



Search

Unsubscribed List/Committee... RUN REPORT

Contact Email List/Committee Opt-out Date Range

Additional Criteria / Filters

Display Options

Fields to Display

Summarize By Display Mode

Results: 4

Contact Name	Default Email	Default Phone	List	Opt-Out Date	Opt-Out Contact Name
Joe Shack	joescrabshack@mailinator.com		Diversity Council	8/3/2023	Elizabeth Diephouse
Debbie Dollar			Fall Festival Planning Committee	8/3/2023	Elizabeth Diephouse
Andrew Lewis	joescrabshack@mailinator.com		Quarterly Community Newsletter	8/3/2023	Andrew Lewis
Gabby Thomas	gabbydrycleaning@mailinator.com		Quarterly Community Newsletter	8/3/2023	Gabby Thomas

Count 4

Managing Unsubscribed Emails

Check the list:

- See if the contact is marked as “Do Not Email” in the list
- Change the setting ONLY with the contact's explicit permission

Check the contact:

- See if the contact's email address is marked as “Transactional Emails Only” or “Do Not Contact”.
- Change the setting ONLY with the contact's explicit permission

Resubscribe the contact:

- Resubscribe contacts ONLY with the contact's explicit permission

MANAGING INVALID EMAILS

Managing Invalid Emails

When an email is bounced or gets a spam report, it's immediately flagged, and GrowthZone will prevent the sending of ANY emails to flagged/invalid emails. The Invalid Email Addresses Report provides a list of all emails in your database that have been marked invalid.

Invalid Email Addresses Report

From the report, you will be able to click into the name of a contact to access the contact's General Tab. From this tab, you will be able to manage the invalid email.

Results: 6

Contact Name ↕	Email Address ↕	Validity Status ↕	Date Invalid ↕
A Place for Dogs	randyg@mailinator	Bad Domain	
Mark Laurence	mark@mailinator	Bad Domain	
Susan Williams	swilliams@mailinator.com	Generic Bounce	1/23/2019
Sheryl Rassler	sheryl.rassler@growthzone.com	Generic Rejection	7/25/2022
Chamber Master	chamber_master@mailinator.com	Generic Bounce	9/28/2022
Deerwood Animal Shelter	deerwoodshelteradmin@mailinator.com	Generic Bounce	10/27/2022
Count 6			

Correcting Invalid Emails

If a user's email address has been noted as invalid, a red yield sign  will be displayed in the contact info section next to the email.



You can recheck the email, mark an invalid email as valid, or edit email address and recheck.

Correcting Invalid Emails

On the contact's Profile tab, click the invalid email and then select your desired action:

Re-Check And Validate Email Address 🖨️ ✕

Email Address	Status	Reported by	Last Status Update
mark@mailinator	Bad Domain	Unknown	

Possible Actions

Select an action to fix this address

None

Mark as valid

Recheck address

Edit email address and recheck

Cancel Save

Correcting Invalid Emails

- **None:** select this option to simply leave the email address as invalid.
- **Mark as valid:** select this option to mark the email as valid. If you've personally verified this address is good even though the verification system indicates it is not, this is the option to mark it as good and remove it from the Invalid Email list.
- **Recheck address:** select this option to recheck the email address. If the address is found to be valid, will be removed from the invalid list. If the address is found to be invalid, it will remain on the invalid list.
- **Edit email address and recheck:** selecting this option will open a text box for you to enter a new email address. The system will check the new email address during its regular overnight process.

THANK YOU!!!