

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

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 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

Tips...

- 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

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

Note/Message

Your membership application for Cheri's Sandboxes -- INTERNAL has been approved.

Membership Details:

Description: Realtor

Frequency: Annually

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,
Cheri's Sandboxes -- INTERNAL
123-123-1234
balloons@mailinator.com

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

1...Membership Application Submitted

Consider














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


Membership Application Confirmation Email

Category
Member communication

Subject
Membership Application Submitted

Template Text

B I U S X₁ X¹ 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 }}

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 *

Membership Application Approved Copy

Description

Membership Application Approved Template

Category *

Member communication

Subject *

Your membership application for {{TENODisplayName}} has been approved

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

- When is the 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*

Membership Application Approved Copy

Description

Membership Application Approved Template

Category*

Member communication

Subject*

Your membership application for {{TENODisplayName}} has been approved

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}}

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

New Member Access

Description

Sent when a new member person is invited

Category

Member communication

Subject

{{ TENName }} Account Creation Link

Template Text

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Insert Merge Field

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,

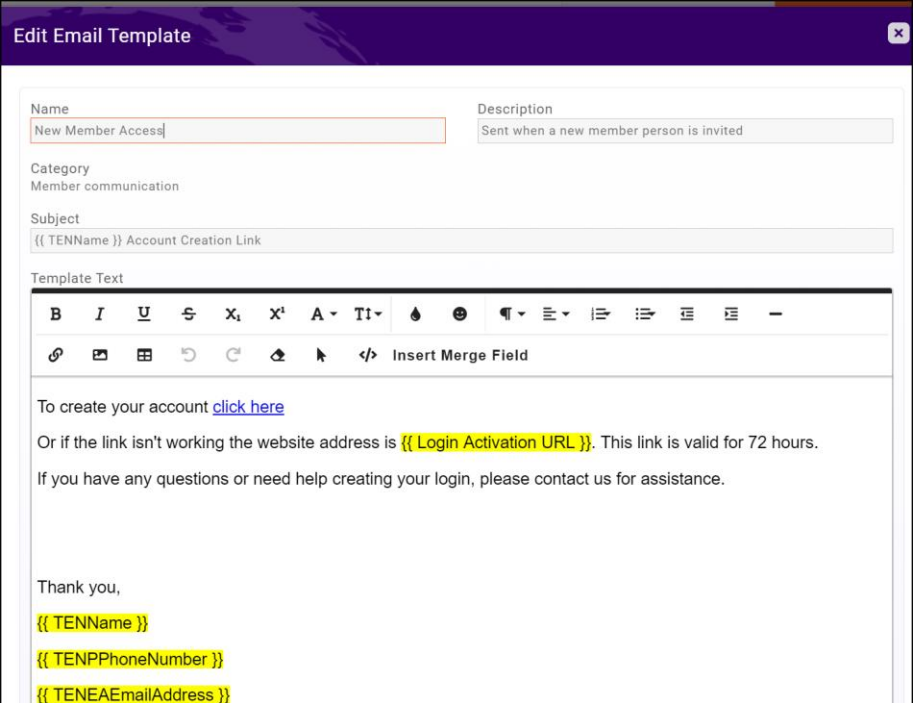
{{ TENName }}

{{ TENPPhoneNumber }}

{{ 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 the 'Edit Email Template' interface for a 'New Member Access' email. The interface includes fields for Name, Description, Category, Subject, and Template Text. The Name field is 'New Member Access', the Description is 'Sent when a new member person is invited', the Category is 'Member communication', and the Subject is '{{ TENName }} Account Creation Link'. The Template Text field contains the following content:

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 }}

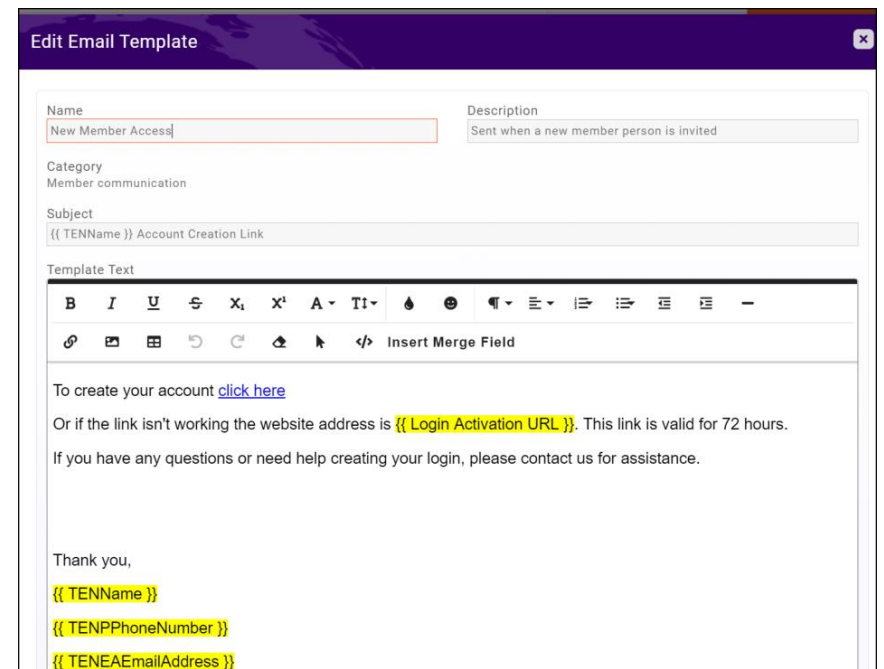
{{ TENPPhoneNumber }}

{{ TENEAEmailAddress }}

3...NEW MEMBER ACCESS

Consider:

- A link to the Info Hub tour video
- Adding links to How To videos, found in our on-line Knowledge Base: [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' window for a template named 'New Member Access'. The description is 'Sent when a new member person is invited'. The category is 'Member communication'. The subject is '{{ TENName }} Account Creation Link'. The template text includes a link to create an account, a fallback login URL using the merge field '{{ Login Activation URL }}', and a thank you message with merge fields for the member's name, phone number, and email address.

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

B I U S X₁ X₂ A T₁  **Insert Merge Field**

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 }}

{{ TENEAEEmailAddress }}

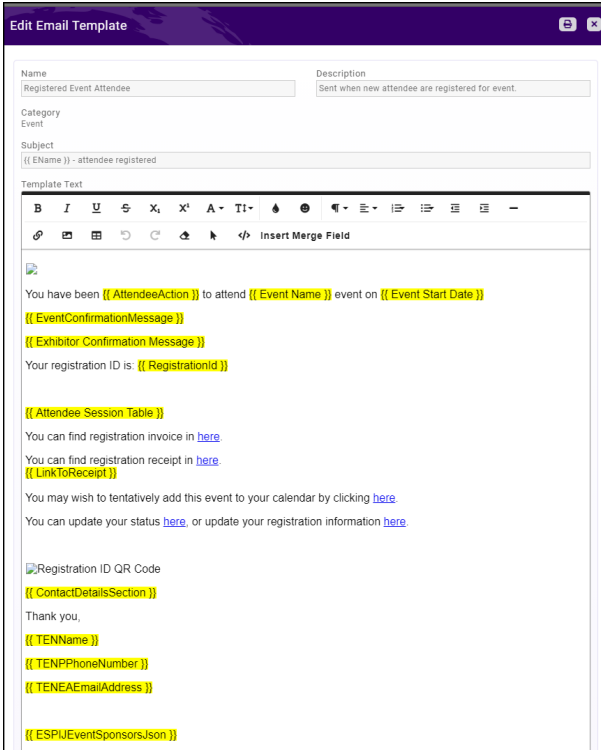
4...EVENT REGISTRATION CONFIRMATION

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



The screenshot shows the 'Edit Email Template' window for a 'Registered Event Attendee'. The 'Name' field is 'Registered Event Attendee' and the 'Description' is 'Sent when new attendee are registered for event.'. The 'Category' is 'Event' and the 'Subject' is '({{ EName }}) - attendee registered'. The 'Template Text' area contains the following HTML content:

Template Text

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](#).

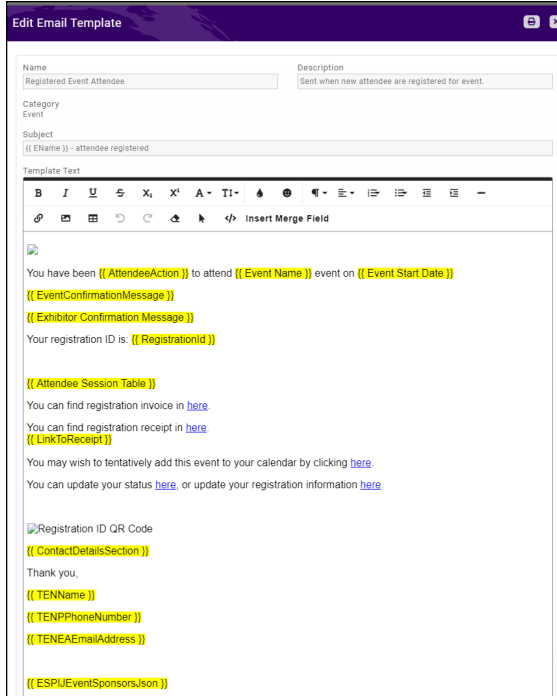
Registration ID QR Code
{{ ContactDetailsSection }}
Thank you,
{{ TENName }}
{{ TENPhoneNumber }}
{{ TENEmailAddress }}

{{ ESPIEventSponsors.Json }}

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



Edit Email Template

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

Category: Event

Subject: {{ EName }} - attendee registered

Template Text

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](#).
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 }}
{{ TENEmailAddress }}

{{ 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 X¹ A⁺ T⁺ 🔍 🌐 ↶ ⌨️ 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 }}

{{ TENEmailAddress }}

{{ ESPIJEventSponsorsJson }}

Instructions and Confirmation Messaging

Attendee Registration Instructions

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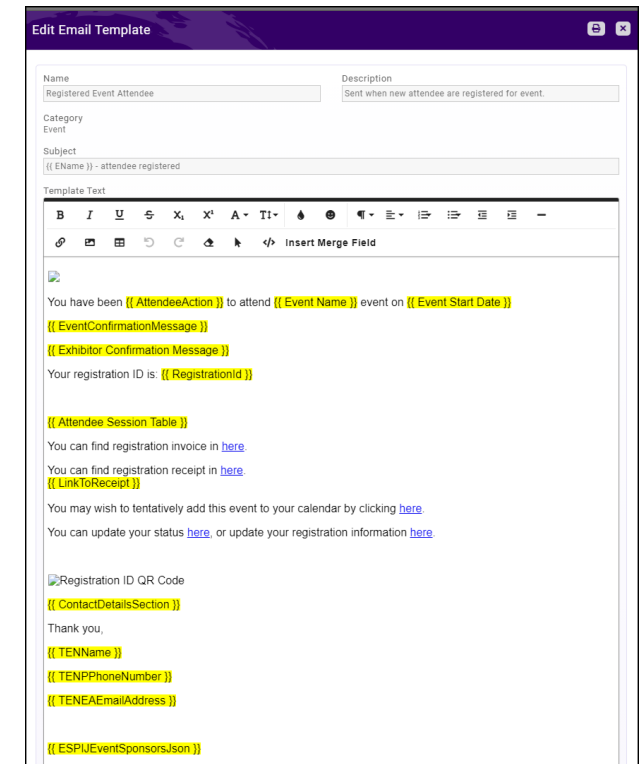
</>

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



The screenshot shows the 'Edit Email Template' window for a 'Registered Event Attendee'. The 'Name' field is 'Registered Event Attendee' and the 'Description' is 'Sent when new attendee is registered for event'. The 'Category' is 'Event' and the 'Subject' is '{{ EName }} - attendee registered'. The 'Template Text' area contains the following HTML content:

Template Text

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 }}
{{ TENEmailAddress }}

{{ ESPUEventSponsors.Json }}

Other event emails you should know

- Event Reminder Template
- Event Waiting List Automated Message
- Unregistered Event Attendee
- Registered Exhibitor
- Event Postponement Notice
- Event Cancellation Notice

5...Invoice email


















When you send out your renewal invoices you can select this template, or simply if you create a one off invoice.

What is already included:

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

5...Invoice email

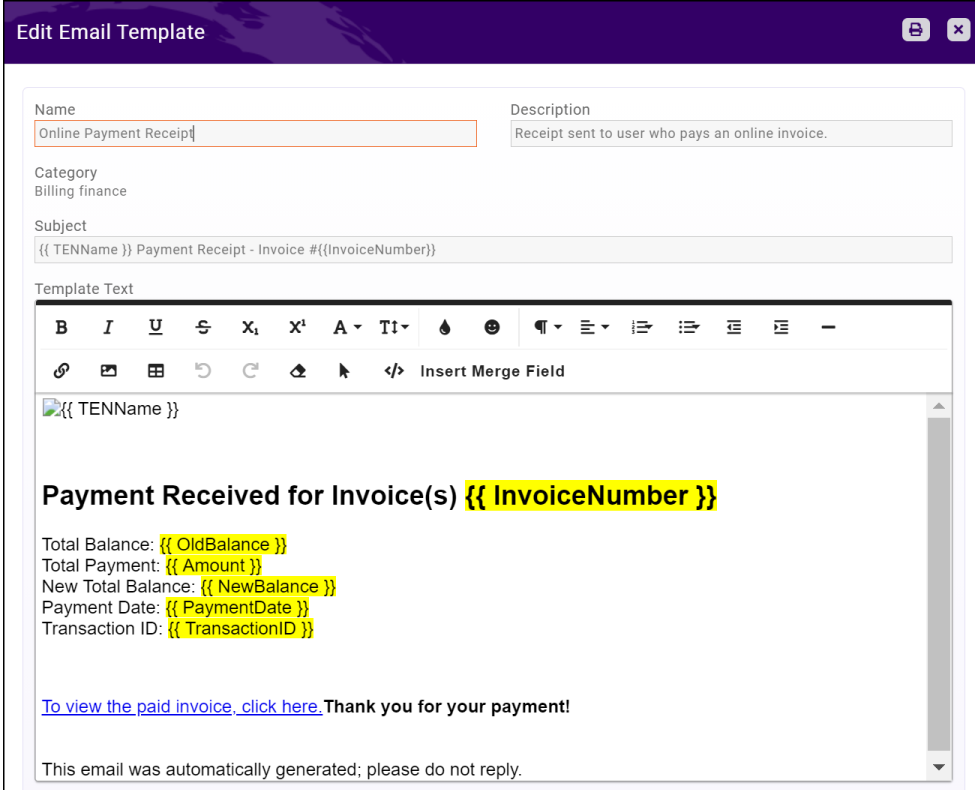
Template Editor

B *I* U ~~S~~ X_1 X^1 **A** \updownarrow                 

5...Invoice email

Consider:

- Updated formatting
- Adding additional information about the association
- Any deductibility statements
- Late fee information



Edit Email Template

Name: Online Payment Receipt

Description: Receipt sent to user who pays an online invoice.

Category: Billing finance

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

Template Text

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.

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

- Make a Copy of a Default Template
- How to 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	
<div><div>B I U S X₂ X² A ▼ T ▼ 🔥 😊 ¶ ▼ ☰ ▼ ⇄ ⇅ ≡ ≡ -</div><div>🔗 📧 🗑 ↶ ↷ ⬆ ➦ </> Insert Merge Field</div></div>	
<div></div> <p>{{ OwnerName }}</p> <p>{{ OrganizationName }}</p> <p>Thank you for filling out our membership application.</p> <p>View/Print Application</p> <p>You can find your registration receipt in here</p> <p>Best regards,</p> <p>{{ TENName }}.</p> <p>{{ TENPPhoneNumber }}</p> <p>{{ TENEAEmailAddress }}</p>	

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](#)

Email Templates				
invoice		✕ ⚡ ✕ Criteria: invoice	ADD TEMPLATE	▼
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	⋮

Need Help?

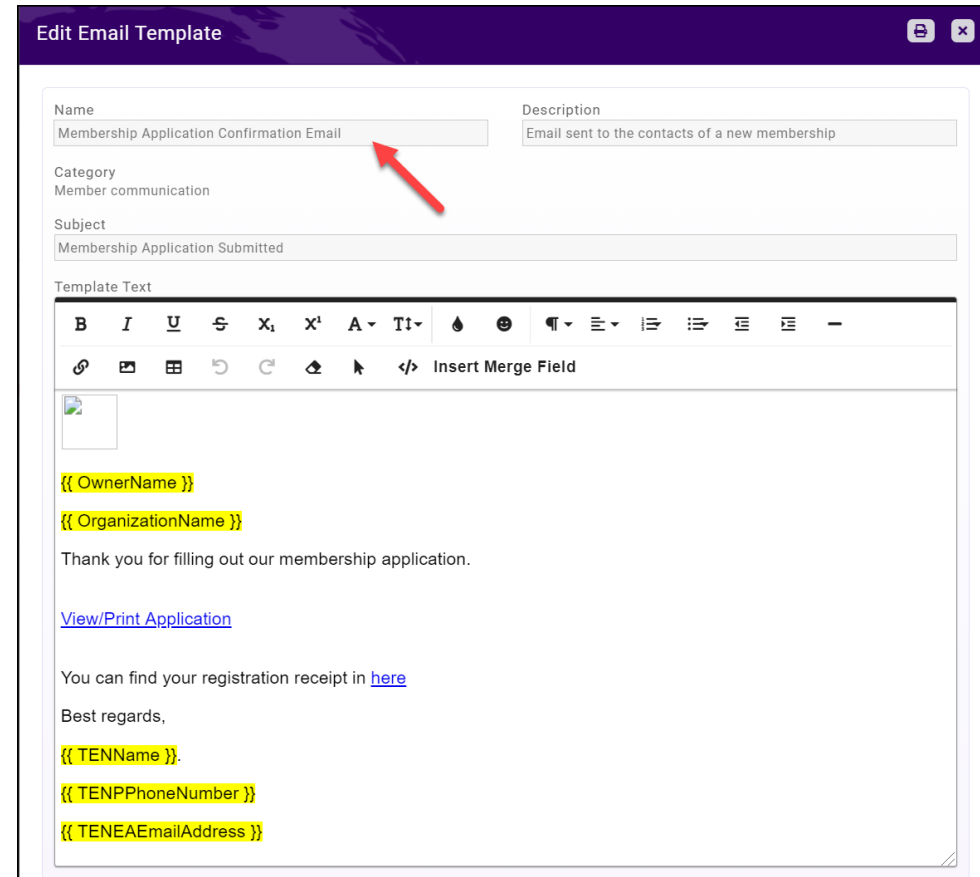
Merge fields

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) would not be... an individual does not have a primary contact
- 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 does not 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 Event Registration Confirmation can be sent out automatically, if you have customized the template, make the needed change
- WIKI: [Automated Messaging](#)



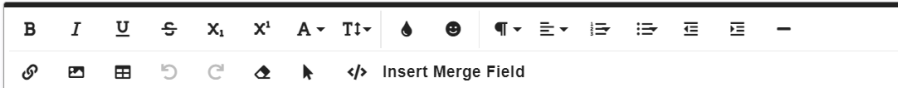
Edit Email Template


Name: Membership Application Confirmation Email
Description: Email sent to the contacts of a new membership

Category: Member communication

Subject: Membership Application Submitted

Template Text

B I U S X₁ X₂ 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 }}
{{ TENEEmailAddress }}

Automated Messaging

- For Example: As the Event Registration Confirmation can be sent out automatically, if you have customized the template
- WIKI:

Automated Messaging

Search... 🔍 ⚡ X TriggerCategoryTypeId: Billing/Finance

Category	Reason for message	Template To Send	Send	Actions
Billing Finance	Sale Payment Receipt	Sale Payment Receipt	Yes	✎
Billing Finance	Invoice Payment Received	Member Invoice Payment Received	Yes	✎
Billing Finance	Growth Zone Pay Account Update Complete	GrowthZone Pay Account Update Complete	Yes	✎
Billing Finance	Growth Zone Pay Account Updated	GrowthZone Pay Account Updated	Yes	✎
Billing Finance	Growth Zone Pay Charge Dispute	GrowthZone Pay Charge Disputed	Yes	✎

Need Help?

Questions?