

How to setup a renewal welcome campaign

Michael C. - 2023-04-05 - Membership

Renewal Welcome Campaigns allow the organization to create a series of automated emails that are sent to members after they renew their membership. This can be used to share information with members and engage them within the organization.

Adding a renewal welcome campaign

1. Navigate to the [Membership Type](#) page. On this page, click on the **Plans** tab.
2. Click on the name of the Price Plan you would like to edit the renewal welcome campaign for. Alternatively, you can click on the down on the same line as the Price Plan and select **Edit**.
3. Click on the **Renewal Settings** tab.
4. In the Renewal Welcome Campaign section, click the **Add Email** button to create a new renewal welcome campaign.
5. This will open the **Add Renewal Campaign Email** window, where you will see the following options:
 - **Name** - The name of the campaign.
 - **Activate this Campaign?** - Determines whether or not the campaign is active.
 - **Email Details**
 - **Template** - Select which [Email Template](#) which will be sent through the campaign.
 - **From** - Select the [Sender Profile](#) which will be used as the sender for the email.
 - **To** - Select whether the email is sent to the individual member or a selected [Recipient Profile](#).
 - **Schedule Email**
 - **When** - How many days after a member renews their membership, they will be sent the campaign email.
 - **Time** - The time of day when the campaign's email will be sent.

6. After you have configured the renewal welcome campaign, click the **Save** button to finalize your changes.

Editing an existing renewal welcome campaign

1. Navigate to the [Membership Type](#) page and click on the Plans tab.
2. Click on the name of the Price Plan you would like to edit the renewal welcome campaign for. Alternatively, you can click on the down arrow on the same line as the Price Plan and select **Edit**.
3. In the **Renewal Welcome Campaign** section, click on the down arrow for the campaign email you would like to adjust.
 - **Preview** - Displays a preview of the renewal welcome campaign's selected email template.
 - **Edit** - Allows you to make adjustments to the renewal welcome campaign's settings.
 - **History** - Displays the history of the renewal welcome campaign.
 - **Make Inactive/Active** - Disables or enables the renewal welcome campaign.
 - **Delete** - Removes the renewal welcome campaign.

Related Content

- [How to edit or change price plans](#)