How to setup an onboarding campaign email

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Onboarding Campaigns allow the organization to create a series of automated emails that are sent to new members after they have joined a specific Price Plan. This can be used to share information with new members and engage them within the organization.

Adding onboarding campaign emails

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 add an onboarding campaign to. Alternatively, you can click on the down on the same line as the Price Plan and select **Edit**.
3. Click on the **Join Settings** or **Approval Settings** tab.
4. To add a new Onboarding Campaign, click on the **Add Email** button in the **Onboarding Campaign** section.
5. This will open the **Add Onboarding Campaign Email** window, where you will see the following options:
    - **Name** - The name of the campaign email.
    - **Activate this Campaign?** - Determines whether or not the campaign email is active.
    - **Email Details**
        - **Template** - Select the 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 to a Recipient Profile.
    - **Schedule Email**
        - **When** - How many days after a member joins when the email will be sent.
        - **Time** - The time of day when the email will be sent.
6. Once you have configured your campaign email, click on the **Save** button to finalize your changes.

Editing an existing onboarding 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 onboarding campaign for. Alternatively, you can click on the down on the same line as the Price Plan and select **Edit**.
3. Click on the **Join Settings** or **Approval Settings** tab.
4. Under the **Onboarding Campaign** section**,** click on the down arrow for the campaign email you would like to adjust.
    - **Preview** - Displays a preview of the campaign email's selected email template.
    - **Edit** - Allows you to make adjustments to the campaign email's settings.
    - **History** - Displays the history of the onboarding campaign.
    - **Make Inactive/Active** - Disables or enables the campaign email.
    - **Delete** - Removes the campaign email from the onboarding campaign.

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