How to setup renewal reminders

David H. - 2023-04-05 - Membership

Renewal Reminders allows you to setup automatic reminder which emails members asking them to renew their membership.

Note

You can add more than one reminder.

Adding a renewal reminder

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 add a renewal reminder to. Alternatively, you can click on the down arrow on the same line as the price plan and select **Edit**.
3. Click on the **Renewal Settings** tab.
4. In the **Renewal Reminders** section, you will may two tabs, Manual and Auto-Renew. This is based on the price plan's renewal type. Click on the tab you would like to adjust:
    - **Manual** - Allows you to create automatic reminders that will be sent to members who manually renew their membership.
    - **Auto-Renew** - Allows you to create automatic reminds that will be sent to members who have enabled the auto-renew option.
5. To add a new renewal reminder, click on the **Add Email** button.
6. This will open the **Add Renewal Reminder Email** window where you will see the following options:
    - **Name** - The name of the renewal reminder.
    - **Activate this Reminder?** - Determines whether or not the reminder is active.
    - **Email Details**
        - **Template** - Select which Email Template which will be sent through the reminder.
        - **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 before/on/after the member's expiration date when the email will be sent.
- **Time** - The time of day when the email will be sent.

7. Once you have configured the renewal reminder, click on the **Save** button to finalize your changes.

Editing an existing renewal reminder

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 reminder for. Alternatively, you can click on the down on the same line as the Price Plan and select **Edit**.
3. In the **Renewal Reminders** section**,** click on the down arrow for the renewal reminder you would like to adjust.
    - **Preview** - Displays a preview of the renewal reminder's selected email template.
    - **Edit -** Allows you to make adjustments to the renewal reminder's settings.
    - **History** - Displays the history of the renewal reminder.
    - **Make Inactive/Active** - Disables or enables the renewal reminder.
    - **Delete** - Removes the renewal reminder.

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