Membership Renewal Emails

Agile Ticketing provides an automated email process to remind your members that their memberships are nearing their expiration date. Follow the instructions below to find out how to set up these automated emails.

1. Click the **Customer Relations** icon. Select **Emails and Letters**.



2. Right-click in the **Emails and Letters** section at the top of the page and click **New**. Select "**Membership Renewal Notice with Level Selection**" from the drop-down. Once that is selected, click **OK**.



3. This will bring up the **Email / Letter** settings.

A Email / Letter	_		×
Agile Theatre			
Data Set Email / Letter Body Description Preview			
Set Parameters Export Data			
MembershipExternalName MembershipLevel MembershipPriceType MemberNumber ApprovalStatusSW DateJoined	DateExpired	Memb	erl
4			>
			-
Preview Data OComplete Data Add Activity Log Send OK	Cancel	Apply	

4. Click the Set Parameters button to define the criteria for this email. A pop-up will appear with several options needing to be set.
a. The Variables tab -

	Membership				
Days T	fill Expiration (Leave B	Blank to Specify Da	te Rage Below)		
2					
Start D	2018 02-59-24 PM				
00/ 30/	2010 02.33.241 M				
End Da	ite				
05/30	/2018 02:59:24 PM				
Membe	ership Level(s) (Separ	ate multiple with a `	7		
(All)					
Renew	al Type(s) (Manual, A	utomatic or Both)			
Manua	al				

- **Days Til Expiration** The number of days before expiration to send an email renewal notice. The number 15 will signal that people will receive an email on the 15th day before the membership expires. If you want to send a notice after expiration, a negative number can be used. The number -10 can be used to signal that customers will receive an email 10 days after their membership expires.
- **Membership Level(s)** This will default to "(All)" and will return all levels. If you want to filter out selected levels, include them in a "~" delimited list. (e.g. The value "Regular" will return only levels defined as "Regular". The value "Regular~VIP" will return levels defined as "Regular" or "VIP".) You can also create an exclusion list to define all levels except the ones listed. (e.g. The value "!=Regular~VIP" will return all levels except those defined as "Regular or VIP.)

		Set Pa	arameters			×
Variables	Membership					
E Agile C C G G S S S te	Theatre ineArts Films ineArts Memberships oncessions and Mercha ift Cards lembership pecial Events pecial Sauce Events est he Films	andise				<
l,						
ID	Name		Active			
23	Cire-Ats Membership	5	Ince			
				ОК	Can	cel

Membership tab - Select the membership program to use for the email.

5. Once the proper parameters have been set, results will be returned to be merged in the email. For nightly emails like this one, each day new customers will be in the result set.

Agile Theatre								
Data Set Email / Letter Body [Description Preview							
Set Parameters Exp	ort Data							
MembershipExternalName	MembershipLevel	MemberNumber	ApprovalStatusSW	Date Joined	DateExpired	Prefix	FirstName	MiddleNa
Agile Membership	Lead Actor	786618	\checkmark	02/02/2019	02/29/2020		Jody	
Agile Membership	Reel Society	788517	\checkmark	02/28/2019	02/29/2020		Maria	
Agile Membership	Dual	1394	\checkmark	08/04/2008	02/29/2020		Blake	
Agile Membership	Individual	152999	\checkmark	05/15/2010	02/29/2020		Megan	
gile Membership	Dual Senior	432069	\checkmark	08/29/2014	02/29/2020		Leslie	
gile Membership	Dual	787001	\checkmark	02/08/2019	02/29/2020		Leanne	
gile Membership	Individual	786815	\checkmark	02/06/2019	02/29/2020		Lela	
gile Membership	Family	388304	\checkmark	12/24/2013	02/29/2020		Barry	
gile Membership	Individual	689108	\checkmark	02/05/2018	02/29/2020		David	
gile Membership	Family	787958	\checkmark	02/22/2019	02/29/2020		Kim	
gile Membership	Individual Senior	787039	\checkmark	02/09/2019	02/29/2020		Pam	
Agile Membership	Individual	220979	\checkmark	06/24/2011	02/29/2020		Chris	
gile Membership	Individual	656532	\checkmark	09/23/2017	02/29/2020		Pavneet	
gile Membership	Dual	581588	\checkmark	02/22/2017	02/29/2020		Leslie	
gile Membership	Individual	689765	\checkmark	02/22/2018	02/29/2020		William	
gile Membership	Dual	645662	\checkmark	09/16/2017	02/29/2020		Dan	
Agile Membership	Individual	579576	\checkmark	12/22/2016	02/29/2020		Chris	
gile Membership	Dual	581319	\checkmark	02/08/2017	02/29/2020		Lindsay	
Agile Membership	Dual	429157	\checkmark	08/21/2014	02/29/2020		Janie	
gile Membership	Dual	580282	\checkmark	01/14/2017	02/29/2020		Arlen	
Agile Membership	Dual	787160	\checkmark	02/11/2019	02/29/2020		Susan	
Agile Membership	Dual Senior	428153	\checkmark	08/08/2014	02/29/2020		Elizabeth	
gile Membership	Dual	563916	\checkmark	09/11/2016	02/29/2020		Andres	
gile Membership	Dual	290221	\checkmark	05/29/2012	02/29/2020		Bob	
Aaile Membership	Individual	468772	\checkmark	02/24/2015	02/29/2020		Ann	
C								>

6. The email message is defined in the **Email Body** tab. Fields that can be merged in the email are available by right-clicking and choosing the **Insert** option.

	CRM Query Email	
Ag	gile Theatre	
Customers [Email Body Description Preview	
From:	support@agiletix.com	
Subject:	Your membership is about to expire	
Attachment:	0 ×	
Times New	wRoman • 3 • b / U 🥙 🏈 🗄 🗄 🗐 🗄 🗄 📰	
-		
Hello %\$	FirstName\$%,	^
Your %\$1	MembershipLevel\$% membership is going to expire in 30 days. Please renew your membership now to continue	
Your %\$] receiving	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %\$1 receiving Thanks,	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %51 receiving Thanks, John Lem	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %51 receiving Thanks, John Lem	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %\$J receiving Thanks, John Lem	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %\$1 receiving Thanks, John Lem	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %\$J receiving Thanks, John Lem	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %\$J receiving Thanks, John Lem	MembershipLevel\$% membership is going to explire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	
Your %5J receiving Thanks, John Lem	MembershipLevel\$% membership is going to expire in 30 days. Please <u>renew</u> your membership now to continue the many benefits provided by the membership.	

7. The **Description** tab is used to describe the email for internal reference purposes.

k.	CRM Query Email	>
Agile Theatre		
Data Set Email / Letter Body Description Pr	eview	
30 day membership renewal notice.		
Preview Data Complete Data	Add Activity Log Send	OK Cancel Apply

8. The **Preview** tab is provided to proof the look and feel of the email to make sure everything is ready to be sent. You will see several options on this screen.

- **Previous** and **Next** Used to see the individualized email for each person.
- Show All Will show every email so you can quickly scroll through them.
- **Print** Some organizations will print letters to send to members. You can print your personalized correspondence by clicking this button.
- **Send Test** Send the current email being previewed to a specified email address. This is useful to make sure that any links in the email work as expected. Send Test can serve as a final check before a bulk email is sent out.

	CRM Query Email –	ļ
~	Agile Theatre	
ata Set	Email / Letter Body Description Preview	
0:	jlemon@agiletix.com	
oun. Subject	Your membership is about to expire	
Attachm	nt.	
Hello	ohn,	
Your provi	ndividual membership is going to expire in 30 days. Please renew your membership now to continue receiving the many benefits ed by the membership.	
Than	a de la constante de	
John	emon	
		30
Previ	is Next Show All Print Hide Records Having Email Address ✔ Hide Opt Out Link (Only Affects Preivew) Send,T	es
Previ	s Next Show All Print Hide Records Having Email Address I Hide Opt Out Link (Only Affects Preivew) Send T	es

9. Nightly emails like this renewal email must be activated for our automated email process. Once your email is ready, please contact your support representative so that they can schedule these reminders for automatic delivery.