

How do I manually send renewal reminders to my club members each month when I want them to be sent ?

If you wish to send renewal reminders to your members by manually emailing them to the members up for renewal in the month you wish you can do so by first creating a “Query” in the system that will give you the people in that month.

Then you use that query to send an email to just those people.

This then allows you in a single action to send the reminder notices to your members at a time determined by you and does not require you to send them individually to the members.

PART ONE:

Steps involved to create the standard email to send. (Note: this may have already been done in your system if your club is set up for online payments)

1. Go to the AA website and click on “About Archery” then select “Database Documents”.
2. Click on “Member Reminder Notice Template”, this will download a .doc file to your computer that you can modify to suit your Club.
3. Modify the form and then save it for future reference.
4. Select and copy the text in the modified template and then,
5. Log in to the AA Membership system for your club.
6. Click on “Tools”
7. Click on “Email Templates”
8. Click on “Add”
9. Enter a Title such as “Member Reminder Notices” and something along the line of in the subject line “Club membership renewal notice”
10. Click on the HTML tab and then click on the “Paste from word” symbol (looks like a paste pot with a W in it).
11. This will open a pop up window where you can paste the information from your template using CTRL – V keys. Then click on “insert” to put the information into the HTML section.
12. Click on the “Plain Text” tab and repeat the process before clicking on “save”.

This will have set up the email for you to use over and over again each month without having to retype anything. This only has to be done once and only edited if any details change at your club, ie postal address change etc.

PART TWO:

Steps involved in creating the member query to select the people with their financial dates in the range you wish.

1. Click on “Members”
2. Click on “Query Builder”
3. Click on “Add”
4. Type a name eg “March 2013 renewals” and click “Save”.
5. Click on the “Build” button.
6. Click on the first “Add” button on the top of the page and then click on the “Where” button on the LH side. Click on SELECT FIELD and choose “financial end date”, change the operator to

>= and pick the 1st day of the month you wish to use (in our example 01/03/13).

7. Click save.
8. Click the same add button at the top and this time click on the “and” button on the LH side. Select the “financial end date” and then set the operator to < and pick the 1st day of the month after the one you put in before (in our example we would put 01/04/13).
9. Click Save.
10. Click on the same "Add" button and click on the "and" button on the left hand side. Select "status" and click on "active"
11. Click Save
12. If you wish to see how many people this will be then you can click on the “Test” button and it will let you know how many people.
13. Click “listing” to go back to the main menu for Query Builder.

(Note: once you have created one month you can copy the query and just change the query name and dates in the copied one to suit the month you are setting it to.)

SAMPLE SCREENSHOTS.

Query Builder

Title: ♦ Renewals 4 April 2013 subscriptions

 Save  Cancel

Renewals 4 April 2013 subscriptions (Filter Listing)

 Listing  Test

 Add

| Member Filter | Edit | Delete |
|---|---|---|
| Where Financial End Date < 01-May-2013 |  |  |
| And Financial End Date >= 01-Apr-2013 |  |  |
| And Status = Active |  |  |

Help on using the query builder can be found at, <http://helpdesq.imgstg.com/forums/20158038-Query-BUILDER>

How do I see a list of who these people are ?

Click on “export” in the Grey menu on the left. Select “Member Query” on the drop down menu. Select your “Member Query” select your “Export Template” and then click “Next” followed by “Export”. This will download to your computer a list of the people who will be up for renewal that month.

(If you do not use an export template the system will give you all the members information, so as to remove the unnecessary columns we normally use a export template that only gives you what you want to see)

How do I now send the reminder emails to these people ?

If you only want to send it to one person then just go to their record and click on the “email” button in their record and then select the email template you wish to send them.

If you have a larger Club and wish to send it to a number of people at once then follow the steps below.

1. Click on “Members” then “Send Email” this will open up a submenu and you then choose “Member Query” from that sub menu.
2. Select the member query you wish to send to (the month you want – refer to above on how to create the query)
3. Select the Email Template – this is the reminder notice.
4. Select “Generate Campaign”
5. Select Campaign Management"
6. Select "Not Started"
7. Click on the email symbol and confirm that you wish to send it.

This will now send the reminder notices only to the members in your query.

Help on sending emails can be found at, <http://helpdesq.imgstg.com/forums/20158892-Member-Email>

Also remember that you can email support@imgstg.com if any clubs have further questions to IMG.