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MESSAGE CENTER HISTORY

Search Messages

Search Messages

X

Q

Search by recipient name, subject, or email address.

Message type:

All

Date Range:

Showing 1 to 18 of 18 entries

←

1

→

↕ Sent to	↕ Subject	When ↕ Sent	↕ Type	↕ Status	Actions
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	● Delivered	View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	● Delivered	View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	● Delivered	View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	● Delivered	View
2 Member(s)	Greetings!	12/22/2025 8:51 AM ET	Email Blast	● Delivered	View
22 Member(s)	Organization Name snow removal scheduled for 8:00 a.m. today	12/21/2025 6:30 AM ET	Email Blast	● Delivered	View

ABOUT MESSAGE CENTER HISTORY

Access the transmission history of system-generated e-mail messages and e-blasts you create. Review when and to whom messages are sent. See who has or has not received and opened a message. Resend individual messages directly from the History window. Search for

messages and message recipients, and narrow the search by message type and transmission date.

NOTE: Message Center History only lists messages sent since the Message Center feature became operational.

MESSAGE CENTER: REVIEW TRANSMISSION HISTORY

The screenshot shows the 'MESSAGE CENTER: REVIEW TRANSMISSION HISTORY' interface. On the left is a dark sidebar menu with options: Onboarding, Admin Dashboard, Account, Manage Site, Membership, Households, Features, Forms, Payments, Financials (BETA), Message Center (highlighted), History (A), Templates, My Sites, Support (4), and Proptia. The main content area is titled 'HISTORY'. It features a 'Search Messages' section with a search box (B), a 'Message type:' dropdown (C) set to 'All', and a 'Date Range:' calendar icon (D). Below the search section is a 'Recent Transmissions' list (E) containing five entries. Each entry shows a message icon, the subject, delivery status, and timestamp. The first three entries are identical: 'Member First Name, Organization Name has sent you an invoice', 'Delivered to 1 Member(s)', and '12/23/2025 6:30 AM ET'. The fourth entry is 'Greetings!', 'Delivered to 2 Member(s)', and '12/22/2025 8:51 AM ET'. The fifth entry is 'Organization Name snow removal scheduled for 8:00 a.m. today', 'Delivered to 22 Member(s)', and '12/21/2025 6:30 AM ET'. At the bottom right of the list is a 'view more →' link (F).

To access message-transmission history, click on the “Message Center” tab of the Admin Dashboard menu and then on the **A** “History” tab.

The initial History window displays up to five of your most-recent transmissions, with a **F** “view more” link to load a full history page if more than five automated and/or custom transmissions have gone through the system.

The search area at the top includes a **B** “Search Messages” box. Type or paste all or part of a message subject, recipient name, or recipient e-mail address. The **C** “Message type:” dropdown menu enables you to select and search for the context in which the message was sent (e.g., Digest, Dues, etc.). Click in the **D** “Date Range:” box to set a timespan for message-transmission search. See the “Search Message History” topic in this document for full search instructions.

The **E** “Recent Transmissions” list presents individually boxed data rows. Each row shows the Subject of a message, the number of Members to whom it was delivered, and the date and time it was sent. Timestamps are shown in Eastern Time. Click on a row to view more information.

Message template Subjects can use special dynamic variables to include the first and/or last name of each recipient, their e-mail address, and/or the community name. In the list of “Recent Transmissions,” the Subject listed shows the name(s) of dynamic variable(s) used in the message template, not the Member-specific information that shows up in individual messages. To search for a message transmission that uses dynamic variable(s) in its Subject, use the name of a variable in your search terms.

MESSAGE CENTER: REVIEW TRANSMISSION HISTORY (continued)

If the **F** “view more” link appears (see previous page), click on it to load the **H** full transmission history, as shown on this page. If the full list contains more than 20 items, use the **I** page-navigation system above and below the list area to move among pages of data.

The search area at the top of the window includes the same controls as the initial “HISTORY” window shown on the previous page.

The **J** list of transmissions presents them in individual rows. A listing can represent a message sent to multiple people, such as an e-blast to all community Members. Some messages were sent to one person, perhaps to facilitate a password reset. Each row presents the number of Members to whom the message was sent, the Subject of the message, the date and time it was sent, the message type, its delivery status, and an “Actions” column with a “View” link to view more details of an individual transmission. Timestamps are shown in Eastern Time.

To see the **K** “Selected message” window for a specific transmission, click on its **L** “View” link.

HISTORY

← back

Search Messages

Search Messages

X

Q

Search by recipient name, subject, or email address.

Message type:

All

Date Range:

Showing 1 to 18 of 18 entries

I

←

1

→

J → Sent to	→ Subject	When → Sent	→ Type	→ Status	Actions
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/23/2025 6:30 AM ET	Dues	Delivered	L View
2 Member(s)	Greetings!	12/22/2025 8:51 AM ET	Email Blast	Delivered	L View
22 Member(s)	Organization Name snow removal scheduled for 8:00 a.m. today	12/20/2025 6:30 AM ET	Email Blast	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/21/2025 5:36 AM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/21/2025 5:36 AM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/21/2025 5:36 AM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/21/2025 5:36 AM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/21/2025 5:36 AM ET	Dues	Delivered	L View
22 Member(s)	Organization Name has approved a Special Assessment for January 2026	12/20/2025 6:28 PM ET	Email Blast	Delivered	L View
22 Member(s)	Holiday greetings from Organization Name to you, Member First Name!	12/20/2025 6:28 PM ET	Email Blast	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/20/2025 4:39 PM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/20/2025 4:39 PM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/20/2025 4:39 PM ET	Dues	Delivered	L View
1 Member(s)	Member First Name, Organization Name has sent you an invoice	12/20/2025 4:38 PM ET	Dues	Delivered	L View

Showing 1 to 18 of 18 entries

I

←

1

→

K

Selected message

X

Organization Name snow removal scheduled for 8:00 a.m. today

To 22 Member(s)

From noreply@hoastart.com

When Sent 12/21/2025 6:30 AM ET

Statuses

Processing

Delivered

Opened

Not Delivered

Details

Recipients

Other Transmissions

At a glance

Sent to 22 Member(s)

3 opens

Delivery status

Partially Delivered

22 messages delivered

MESSAGE CENTER: REVIEW TRANSMISSION HISTORY (Continued)

K

M

Selected message

Organization Name snow removal scheduled for 8:00 a.m. today

To 22 Member(s)

From noreply@hoastart.com

When Sent 12/21/2025 6:30 AM ET

N

×

Processing ?

Delivered ?

Opened ?

Not Delivered ?

The top section of the **K** “Selected message” window for a specific transmission provides information about the overall transmission. It begins with the **M** Subject of the message transmission. The message subject shown here includes dynamic variables. These are replaced with individualized data on the individual messages sent to Members. For example, “Member First Name” becomes the recipient’s first name, and “Organization Name” becomes the community name.

“To” identifies how many people were sent the message.

“From” shows the whitelisted sending address from which the message was sent.

“When Sent” provides the transmission date and time of the message (expressed in Eastern Time).

The **N** “Statuses” legend explains the status shown for each recipient.

- ◆ **Processing [yellow]** “Message transmission in progress”
- ◆ **Delivered [green]** “Message has reached its recipient”
- ◆ **Opened [blue]** “Recipient has opened the message”
- ◆ **Not Delivered [red]** “Message cannot reach recipient (e.g., address is bad or blocked; mailbox full; recipient blocked a previous message as spam)”

Note that the **N** “Statuses” legend provides you with standardized definitions of all four statuses based on how these terms are used to explain how e-mailed transmissions are processed from “Send” through reception.

MESSAGE CENTER: REVIEW TRANSMISSION HISTORY (Continued)

K

M

Selected message

Organization Name snow removal scheduled for 8:00 a.m. today

To22 Member(s)

Fromnoreply@hoastart.com

When Sent12/21/2025 6:30 AM ET

N

Statuses

Processing ?

Delivered ?

Opened ?

Not Delivered ?

O

Details

P

Recipients

Q

Other Transmissions

R

At a glance

Sent to 22 Member(s)

3 opens

S

Delivery status

Partially Delivered

22 messages delivered

The bottom section of the **K** “Selected message” window provides a tabbed interface that itemizes three types of information about the specific transmission. These are the **O** message “Details,” shown here; the **P** “Recipients”; and **Q** “Other Transmissions” that use the same Message Center History Template. Note that the Template name may be very different from the message Subject.

The “Details” tab includes an **R** “At a glance” section that provides two critical pieces of information: The number of people who were sent the message, and the number of those people who opened the message at least once.

An “open” occurs when an individual message recipient clicks on a message to view its contents, either inline in their e-mail software or in a separate window. Note that privacy concerns prompt some people to set up their e-mail software so it counteracts the tracking mechanisms that make it possible to tally

message “opens.” These people can read a message without their activity registering as an “open.” As a result, more people may have opened your message than your statistics can identify.

The “Detail” tab **S** “Delivery status” uses the message status criteria shown in the **N** “Statuses” legend. It provides a summary of the overall delivery status of the entire transmission, which may include individual messages that were or were not actually delivered.

MESSAGE CENTER: REVIEW TRANSMISSION HISTORY (Continued)

K *Selected message*

M Member First Name, Organization Name has sent you an invoice

To 1 Member(s)

From noreply@hoastart.com

When Sent 12/23/2025 6:30 AM ET

N **Statuses** ×

- Processing ?
- Delivered ?
- Opened ?
- Not Delivered ?

O Details **P** Recipients **Q** Other Transmissions

T Search Recipients × 🔍

Status U All ⌵

V When Sent	Recipient(s)	Contact Info	Status	Opens ?	Resend W
12/23/2025 6:30 AM ET	Jane Webster	jane-webster@jane-w...	● Delivered	0	↻ W

The **P** “Recipients” tab lists each individual message sent as part of the overall message transmission. It may include one individual or all your community Members. Note only a portion of the window shown here is visible. In full, it lists 22 individual messages involved in this transmission.

In the **T** “Search Recipients” box, type or paste all or part of the **name of a recipient** or the **e-mail address of a recipient**. Because you already are viewing information about a specific message transmission, this set of search controls does not provide the ability to search for the subject of a message. Remember that more information doesn’t always produce better search results. Click on the Search button (magnifying glass) to perform the search. To clear the “Search Messages” box, click on the Clear button (“X”).

To search for individual messages by delivery status within the overall transmission, open the **U** “Status” dropdown menu and select one of the status criteria shown in the **N** “Statuses” legend.

The **V** bottom portion of the “Recipients” tab lists information about each individual message contained in this overall message transmission.

“When Sent” lists message-transmission date and time (in Eastern Time).

“Recipient(s)” lists the name of each individual to whom this message transmission was sent.

“Contact Info” lists each recipient’s e-mail address.

“Status” itemizes each message’s delivery status.

“Opens” shows the number of recorded message opens for each individual message.

Click on the **W** “Resend” arrow to send another copy of an individual message.

MESSAGE CENTER: REVIEW TRANSMISSION HISTORY (Continued)

K

M Selected message

N Organization Name snow removal scheduled for 8:00 a.m. today

To 22 Member(s)

From noreply@hoastart.com

When Sent 12/21/2025 6:30 AM ET

N Statuses X

- Processing ?
- Delivered ?
- Opened ?
- Not Delivered ?

O Details

P Recipients

Q Other Transmissions

V When Sent	Sent to	Subject	Status	
12/20/2025 5:51 AM ET	1 Member(s)	Organization Name snow removal scheduled for 8:00 a.m. to c	Delivered	→ X

The **Q** “Other Transmissions” tab lists other message transmissions sent using the same message template used for the message analyzed via the “Selected message” window.

The **V** bottom portion of the “Other Transmissions” tab lists information about each individual message contained in any overall message transmission listed.

“When Sent” lists the date and time (in Eastern Time) of message transmission.

“Sent to” specifies how many individuals were sent messages in any additional transmissions shown.

“Subject” displays the message title(s) of other transmissions.

“Status” itemizes the delivery status of each recipient’s message based on the possibilities shown in the **N** “Statuses” legend. Note that a message must have been “Delivered” to be “Opened.”

Click on the **X** arrow to open another instance of the “Selected message” window that displays information about a specific “Other Transmission.” Note that some message transmissions may not have any “Other Transmissions,” and some may use templates that you cannot edit.

MESSAGE CENTER: SEARCH MESSAGE CENTER HISTORY

SEARCH CONTROLS

Search capabilities appear in three places.

- A** On the Message Center History landing page.
- B** On the full list of message transmissions accessible via the “view more” link at the bottom of the landing page.
- C** On the “Selected message” window’s “Recipients” tab, which lists information about the individual recipients of a message.

SEARCH CAPABILITIES

1 Recipient name or e-mail address; Subject

4 Recipient name or e-mail address

In the “Search Messages” box, type or paste all or part of the **name of a recipient, subject of a message, or e-mail address of a recipient**. (The “Search Recipients” version of this search does not search for message subject.) Note: More information may not produce better search results.

2 Message type

Use the “Message type” dropdown menu to select the context in which the message was sent (e.g., Digest, Dues, etc.). Leave set to “All” if you are unsure of the message type. Choose “Email Blast” for messages sent via Membership > Members > Members Actions > Message Filtered Members.

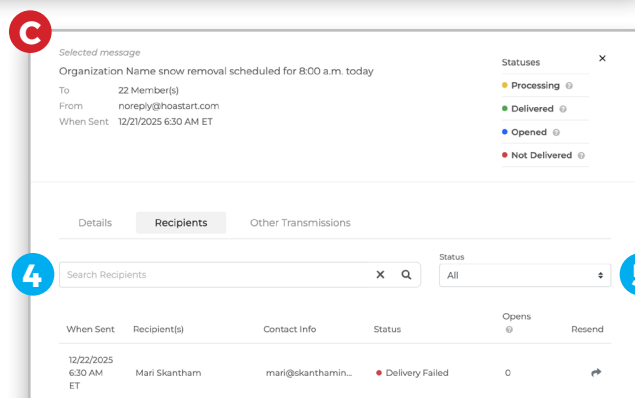
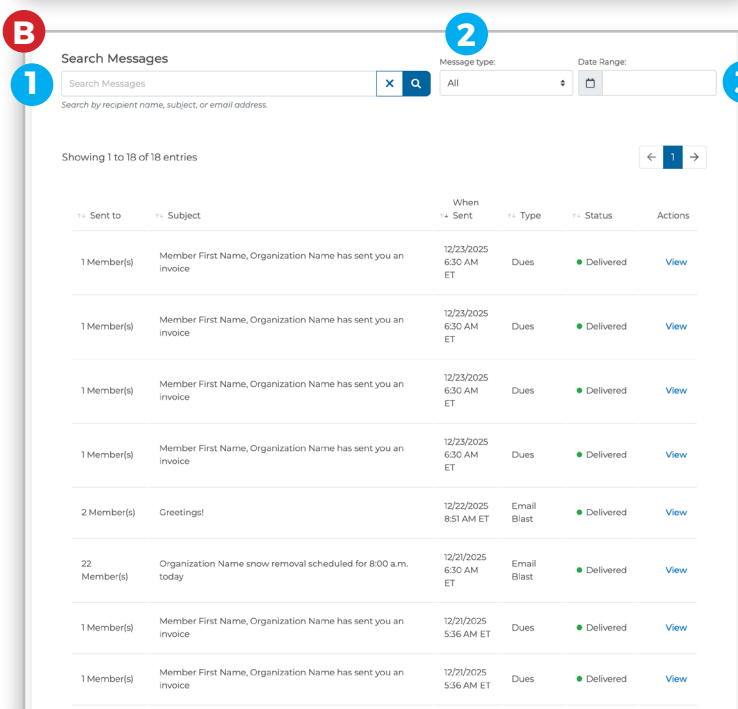
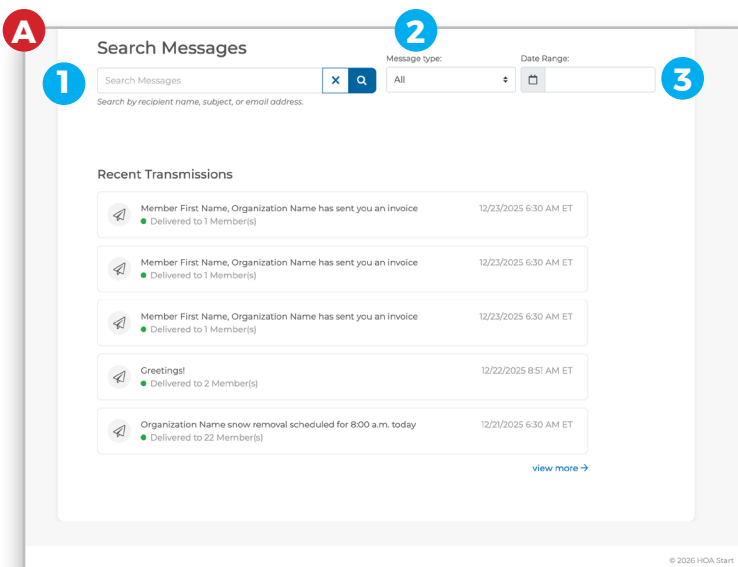
3 Date range

Specify the start and end of the timespan during which a specific message went out. If you set up a delayed transmission, search for the send date, not the date on which you set up the messaging.

4 Status

Delivery status of an individual instance of a message: “Processing,” “Delivered,” “Opened,” “Not Delivered.” Two of these states overlap: A message must be “Delivered” first before it can be “Opened.”

See additional search details on the following pages.



MESSAGE CENTER: SEARCH MESSAGE CENTER HISTORY (Continued)

A

Search Messages

1 Search Messages **6** **7** **2** Message type: **3** Date Range:

Search by recipient name, subject, or email address.

B

Search Messages

1 Search Messages **6** **7** **2** Message type: **3** Date Range:

Search by recipient name, subject, or email address.

SEARCH CONTROLS

- A** On the Message Center History landing page.
- B** On the full list of message transmissions accessible via the “view more” link at the bottom of the landing page.

SEARCH CAPABILITIES

1 Recipient name or e-mail address; Message subject

Type or paste your search term into the “Search Messages” box. This can be all or part of a name, e-mail address, or message subject. Click on the **7** Search button (magnifying glass) to perform the search. To clear the “Search Messages” box, click on the **6** Clear button (“X”).

2 Message type

The “Message type” dropdown menu lists all the contexts in which an Admin—or an automatic process—can send e-mail-based messaging through the system. Leave the menu set to “All” if you are unsure of the message type or want to search for more than one type.

3 Date range

Click on a date to set the start of the date range. Click on a second date to set the end of the date range.

2 Message type:

- ✓ All
- Amenities
- Boardroom
- Committees
- Digest
- Dues
- Email Blast
- Events
- Forms
- Member Registration
- One-Time Charges
- Set Password
- Support Ticket
- Ticketing
- Violations
- Voting/Surveys
- Wallet

3 Date Range:

Cancel Set

Start Please select End Please select

December 2025 < >

S	M	T	W	T	F	S
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Use the “<” and “>” arrows to move forward or back one month at a time.

Click once on the month/year text to select from a list of the months of that single year.

Click on the single year to select from a range of years. Select a month/date from the year selected.

Select the date range and click on the “Set” link to finalize it. The “Set” link stays grayed out until you choose both start and end dates.

MESSAGE CENTER: SEARCH MESSAGE CENTER HISTORY (Continued)

SEARCH CONTROLS

C On the “Selected message” window’s “Recipients” tab, which lists information about the individual recipients of a message.

SEARCH CAPABILITIES

4 Recipient name or e-mail address

In the “Search Recipients” box, type or paste all or part of the **name of a recipient** or the **e-mail address of a recipient**. Because you already are viewing information about a specific message transmission, this set of search controls does not provide the ability to search for the subject of a message. Remember that more information doesn’t always produce better search results. Click on the **7** Search button (magnifying glass) to perform the search. To clear the “Search Messages” box, click on the **6** Clear button (“X”).

5 Status

Delivery status of an individual instance of a message. Near the top of this modal window, a color-coded **8** status legend explains all four of these possibilities. The list of recipients uses the same status levels, color codes, and explanations. Note that a message must be “Delivered” before it can be “Opened.”

- ◆ **Processing [yellow]** “Message transmission in progress”
- ◆ **Delivered [green]** “Message has reached its recipient”
- ◆ **Opened [blue]** “Recipient has opened the message”
- ◆ **Not Delivered [red]** “Message cannot reach recipient (e.g., address is bad or blocked; mailbox full; recipient blocked a previous message as spam)”

MESSAGE CENTER TEMPLATES

TEMPLATE

[← back to templates](#)

Automated (12)

Custom (3)

Cancel

Invoice Late

Reset

Save

Subject*

Member First Name

, your invoice from

Organization Name

 is now late.

Heading

Member First Name

,

Organization Name

 sent you an invoice with a due date of

Invoice Due Date

.

Body

We're emailing to tell you your payment is now late. Please send your payment as soon as possible. The attached PDF itemizes the details of how to pay. If you have any questions about this invoice, or if you believe you have received this message in error, please contact your organization's administrator through the website.

Static

Dynamic

General

Organization Name

Member First Name

Member Last Name

Member Email

Invoice

Due Name

Invoice ID

Invoice Due Date

Invoice Late Date

ABOUT MESSAGE CENTER TEMPLATES

Edit standard system messages about invoicing and Membership to add your community's specific content or to focus these messages on what you want to convey. The system will use your customized versions instead of the default messaging. Revert these messages to their standard versions at any time. To turn off the system processes associated with a specific type of messaging (e.g., sending out

invoices or late-payment reminders), deactivate the Automated Template that sends out the messages.

(This template-deactivation feature gives you unprecedented power over associated system features, so only deactivate an automated template if you are sure that you do not want its associated features to be active.)

NOTES: MESSAGE CENTER TEMPLATES (Continued)

The screenshot displays the 'TEMPLATE' editing interface. At the top, there's a 'back to templates' link. Below it, a tab bar shows 'Automated (12)' and 'Custom (3)'. The main editing area is divided into two sections: a left panel for content and a right sidebar for dynamic fields.

Left Panel:

- Buttons: 'Cancel', 'Template Name (Required)', 'Save'.
- Fields: 'Subject*' (with a pencil icon), 'Heading' (with delete and edit icons), 'Body' (with delete and edit icons).
- Attachments section with an 'Upload file' button.

Right Sidebar:

- Tabs: 'Static' and 'Dynamic'.
- Section: 'General' (expanded).
- Dynamic Fields: 'Organization Name', 'Member First Name', 'Member Last Name', 'Member Email'.

ABOUT CUSTOM MESSAGE CENTER TEMPLATES

Create Custom Templates and use them to send e-blasts through Message Filtered Members.

{[Membership](#) > [Members](#) > [Message Filtered Members](#)}

Message Center Custom Templates include **modular components** for specific message areas, such as the message subject and message body, as well as the ability to add interactive buttons and attach a document.

Additionally, **dynamic fields** enable you to add message elements that are replaced with information specific to individual recipients, including a first and/or last name, e-mail address, and community name, as well as elements of specific types of messages, such as the name or invoice due/late date of a specific dues item. With

these dynamic fields in your message template, your system messages and e-blasts display personalized content to each recipient.

Static fields add specific types of modular message areas to your templates. These include message headings, message body areas, clickable/linked buttons, and embedded images.

Add dynamic and static fields when you edit stock system message templates or create your own original templates.

NOTES: MESSAGE CENTER TEMPLATES (Continued)

A TEMPLATES

Automated (12) Custom (3)

12 Templates

Search Templates

Showing 1 to 12 of 12 entries

Name	Subject	Type	Date modified
Invoice Late	Member First Name, your invoice from Organizatio...	Invoice Late	12/17/2025
Invoice Marked as Paid	Your invoice for Organization Name has received a ...	Invoice Marked as Paid	12/17/2025
Invoice Reminder	Member First Name, your invoice from Organizatio...	Invoice Reminder	12/17/2025
Invoice Sent	Member First Name, Organization Name has sent y...	Invoice Sent	12/17/2025
Invoice Sent Manually	Member First Name, Organization Name has sent y...	Invoice Sent Manually	12/17/2025
Member Registration	Member First Name, thank you for registering to th...	Member Registration	12/17/2025
Registration Approved	Member First Name, your request to join Organizat...	Registration Approved	12/17/2025
Registration Rejected	Member First Name, your request to join Organizat...	Registration Rejected	12/17/2025
Set Password Auto	Member First Name, please reset your online passw...	Set Password Auto	12/17/2025
Set Password Confirmation	Member First Name, you've set your Organization ...	Set Password Confirmation	12/17/2025
Set Password Manually Sent	Member First Name, please reset your online passw...	Set Password Manually Sent	12/17/2025
Set Password Registration Approved	Member First Name, welcome to Organization Na...	Set Password Registration Approved	12/17/2025

Showing 1 to 12 of 12 entries

B

C

D

ABOUT AUTOMATED MESSAGE CENTER TEMPLATES

Control and change **A** Automated Templates to alter the language in messages that control the functionality of invoicing, Member registration, and password resets.

The Automated Templates in **B** take care of the details of invoicing Dues and Fees. As shown above, these include templates for messages about late payments, payments received, and payment reminders, as well as the messaging that sends invoices and provides a reminder before the due date.

C covers Member registration, including approval and rejection of requests for Membership.

D handles automated password resets, confirmations, manually sent resets, and approvals that arrive after new Members set their passwords.

If you deactivate any of these message templates, the corresponding features and functionality also deactivate. For example, if you deactivate invoicing templates, invoices do not go out.

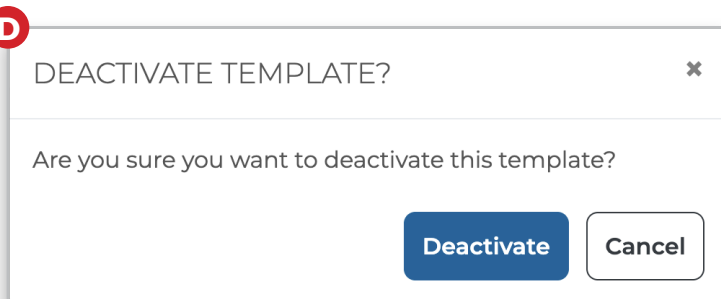
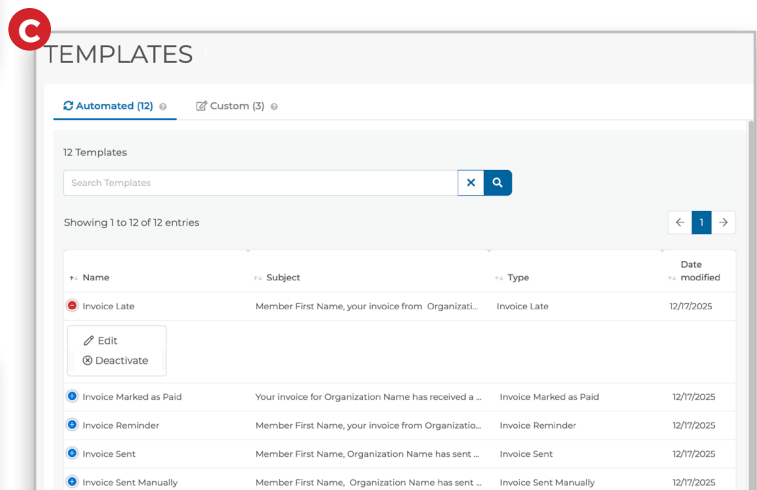
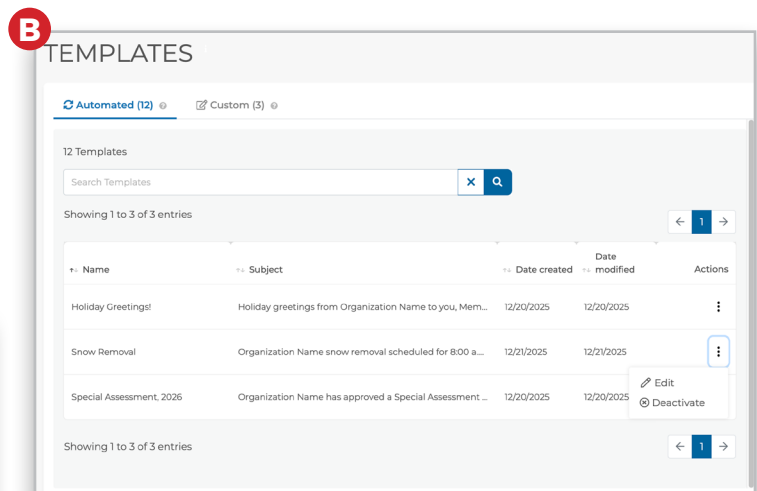
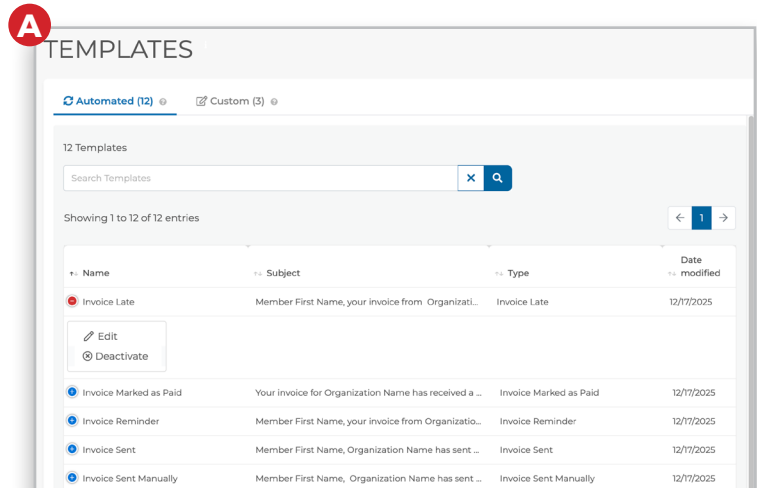
MESSAGE CENTER: ACTIVATE/DEACTIVATE TEMPLATES

CHANGE TEMPLATE STATUS

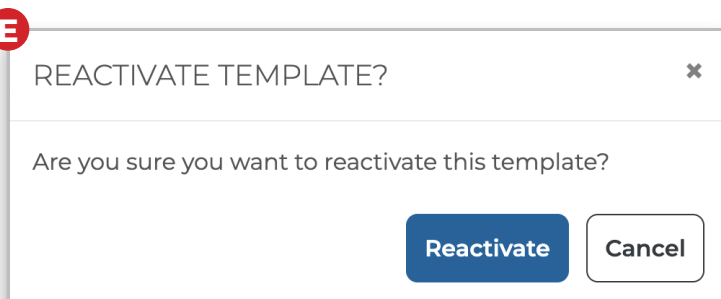
Activate or deactivate both **A** Automated Templates and **B** Custom Templates to determine which messages and their corresponding features are active.

The “Actions” column or feature contains a three-dots link to the menu you use to deactivate (or edit) an individual template. Depending on your device-screen size and the type of template list you view, you may see an “Actions” column or a blue button with a “+” in it. Either click directly on the three-dots link for the individual template, or click on the blue button to access and click on the three-dots link.

The “Deactivate” option brings up a **D** window in which you confirm what you want to do.



If the **C** template already is deactivated, its row appears with a light-gray background, and the three-dots menu offers the option to **E** reactivate the template instead of deactivating it.



See the following page for important notes about template deactivation.

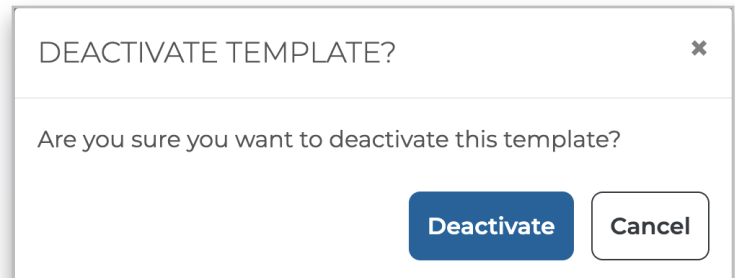
MESSAGE CENTER: ACTIVATE/DEACTIVATE TEMPLATES (Continued)

IMPORTANT NOTES ABOUT TEMPLATE DEACTIVATION

The software performs certain automated features that require specific Automated Templates to be active. **If you deactivate an Automated Template, you also deactivate its corresponding system features.**

Therefore, template deactivation through the Message Center has important consequences for website, Member Portal, and mobile app operations. Before you change the status of an Automated Template, ensure that you understand which operation it controls and, most importantly, verify whether you want to stop the system from performing that operation.

The examples at right outline some of the outcomes of template deactivation. Note that these are not all of the possible consequences.



Examples (Automated Templates):

- ◆ If you deactivate the template used for messages that send out invoices, **the system cannot and will not send out invoices**, regardless of whether invoices are scheduled to go out based on how you have set up Dues and Fees or one-off Wallet invoices. Note that Dues and Fees uses a different template to send invoices than one-off Wallet invoices use.
- ◆ If you deactivate the template for messages that send out invoice-due reminders, **the system cannot and will not send out these reminders**.
- ◆ If you deactivate the template for messages that send out reminders about late, unpaid invoices, **the system cannot and will not send out these reminders**.
- ◆ If you deactivate the template used for messages that notify prospective Members that they have been accepted or rejected for Membership, **the system cannot and will not notify them of their application status**.
- ◆ If you deactivate the template for messages that send out password resets or confirmations, **the system cannot and will not send out password resets**.

Example (Custom Templates):

- ◆ If you deactivate a custom template, it no longer is available for use through Message Filtered Members.

MESSAGE CENTER: CREATE CUSTOM TEMPLATES

TEMPLATES

Automated (12) Custom (3)

3 Templates

Search Templates Show Inactive ☐ B

Showing 1 to 3 of 3 entries ← 1 →

Name	Subject	Date created	Date modified	Actions
Holiday Greetings!	Holiday greetings from Organization Name to you, Mem...	12/20/2025	12/20/2025	⋮
Snow Removal	Organization Name snow removal scheduled for 8:00 a...	12/21/2025	12/21/2025	⋮
Special Assessment, 2026	Organization Name has approved a Special Assessment ...	12/20/2025	12/20/2025	⋮

Showing 1 to 3 of 3 entries ← 1 →

BUILD YOUR OWN CUSTOM MESSAGE CENTER TEMPLATES

Custom templates enable you to prefabricate and format your own unique message frameworks and content for use in communicating with community Members.

{Membership > Members > Message Filtered Members}

Note that only Custom Templates provide the ability to create new messaging. Automated Templates are set up through the system to support specific software functions. You can edit, deactivate, and activate some of these templates, but you cannot create them.

To get started on the process of creating a Custom Template, click on the “Message Center” tab in the vertical dashboard menu, and select A “Templates.” In the “TEMPLATES” window, click on the B “+New” button.

MESSAGE CENTER: CREATE CUSTOM TEMPLATES (Continued)

BUILD YOUR OWN CUSTOM MESSAGE CENTER TEMPLATES

When you create a Custom Template in the “TEMPLATE” window, you begin with a set of required elements and standard content modules, shown above.

C “**Template Name**” (required) provides the template’s internal title. It is not visible to message recipients.

D “**Subject**” (required) appears on actual messages in a recipient’s inbox.

The editing window also includes modules for **E** “**Heading**” (optional) and **F** “**Body**” (optional). The “Heading” typically appears in larger type above the “Body,” which provides the overall message content. Both of these modules are

optional, but a message that does not include them may not offer much content or value to recipients.

G “**Attachments**” (optional) enables you to add one or more documents to accompany the message.

The **H** field selection area enables you to add “Static”(not shown) and “Dynamic” (shown) items to your template. Use “Static” items to create additional content modules and “Dynamic” items to create text content that changes to reflect information about each individual message recipient.

MESSAGE CENTER: CREATE CUSTOM TEMPLATES (Continued)

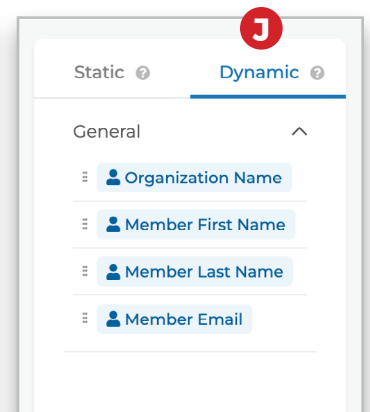
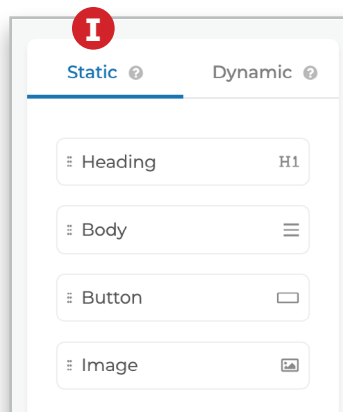
BUILD YOUR OWN CUSTOM MESSAGE CENTER TEMPLATES

I “Static” items add content modules to your template. **J** “Dynamic” variables create context-sensitive text in “Static” modules, personalizing each individual message.

To add a “Static” content module to your template, drag and drop it from the **I** list of static modules to the editing window. Drag and drop individual “Static” modules vertically in the template window to change the order in which they appear in individual messages.

To remove a “Static” content module, click on the Delete icon (trash can) inside the individual module box.

To edit a “Static” content module, click on the Edit icon (pencil) inside the individual module.



To add a **J** “Dynamic” variable to a “Static” content module in the message, edit the module, and then drag and drop the “Dynamic” item into the text area, either on a line by itself or into existing text.

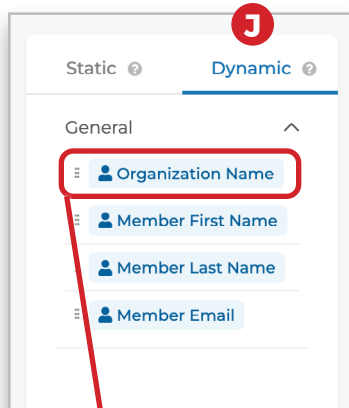
MESSAGE CENTER: CREATE CUSTOM TEMPLATES (Continued)

BUILD YOUR OWN CUSTOM MESSAGE CENTER TEMPLATES

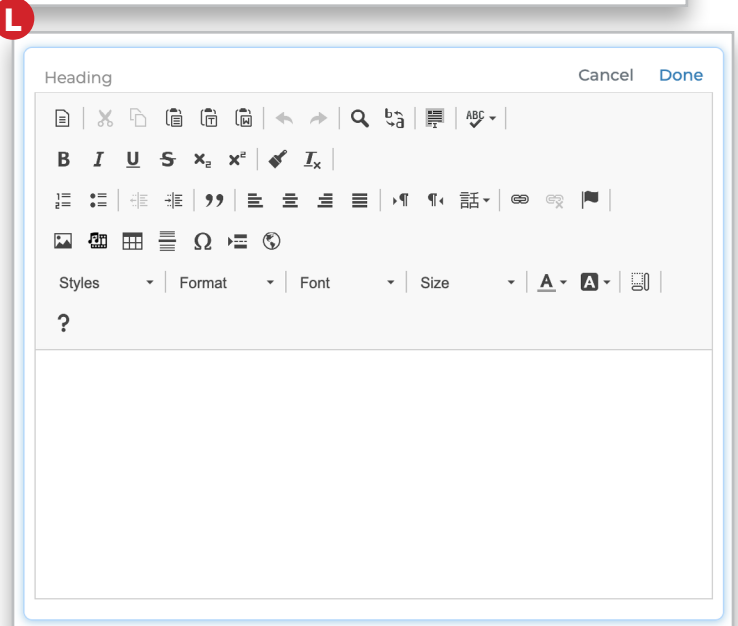
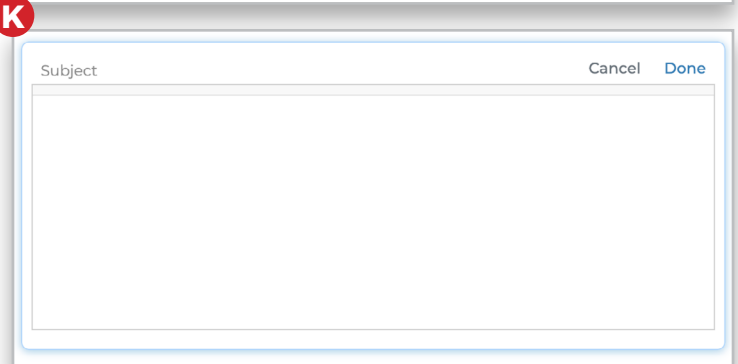
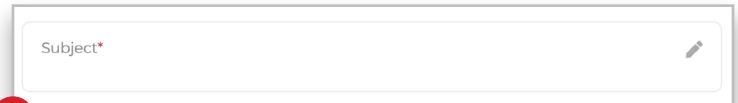
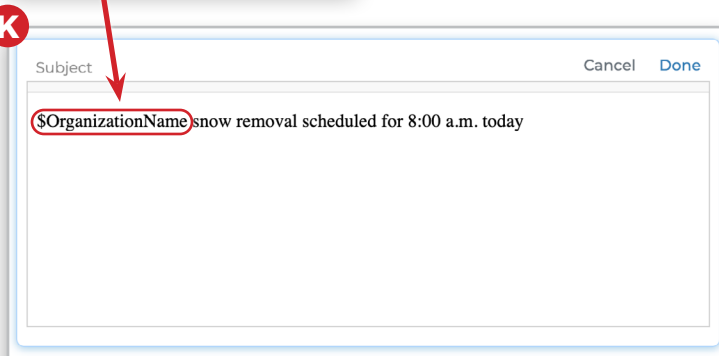
K “Subject” static module, shown first in review mode and then in edit mode. Type or paste your text into the text-entry area. Use the toolbar above the entry area to style your text and add other features to it. Click on the “Done” link to complete your edit or the “Cancel” link to abandon your changes.

L “Heading” static module in review and in edit mode. Type or paste your text into the text-entry area. Use the toolbar above the entry area to style your text and add other features to it.

The editing and formatting toolbar shown above the text-entry area of the Heading static module provides you with options you may recognize from Site Setup and from Message Filtered Members. For more information on how to use these tools, please see the [“Style Controls for the Text Editor in Widgets \(Site Setup\), E-blasts, Message Center, and More”](#) topic in online help.



To add a **J** “Dynamic” variable to a **K** “Static” content module, edit the module, and then drag and drop the “Dynamic” item into the text area, either on a line by itself or into existing text.



MESSAGE CENTER: CREATE CUSTOM TEMPLATES (Continued)

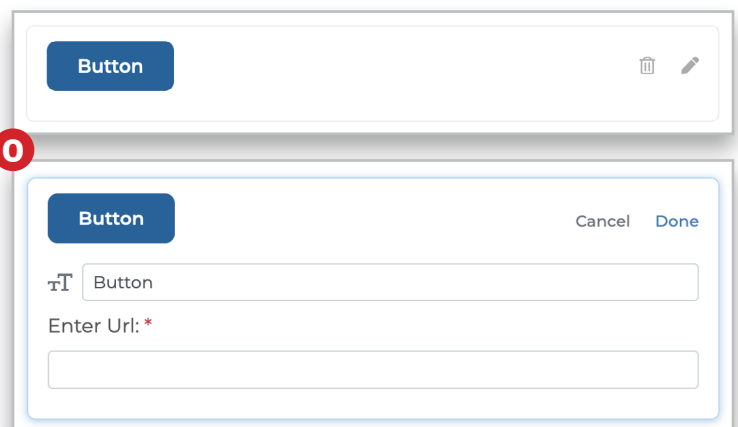
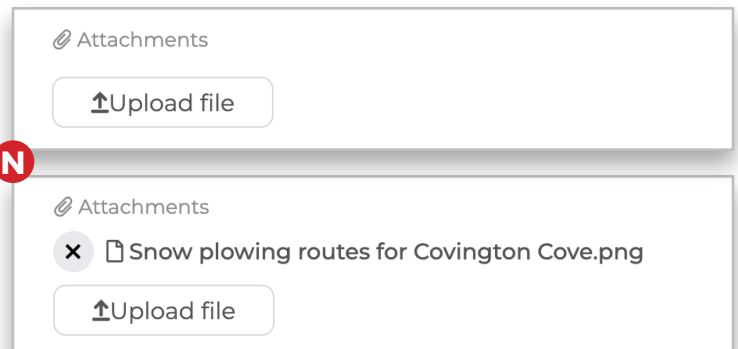
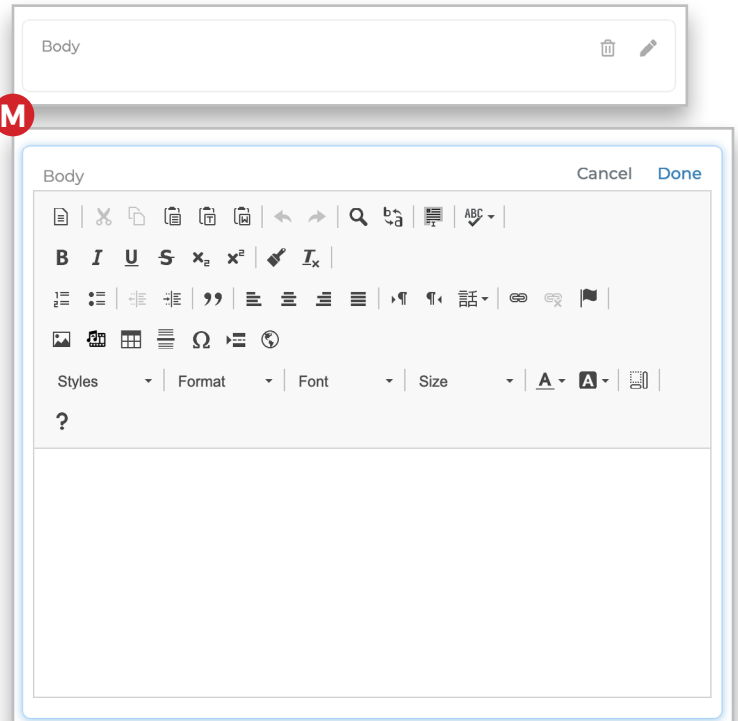
BUILD YOUR OWN CUSTOM MESSAGE CENTER TEMPLATES

M “Body” static module, shown first in review mode and then in edit mode. Type or paste your text into the text-entry area. Use the toolbar above the entry area to style your text and add other features to it. Click on the “Done” link to complete your edit or the “Cancel” link to abandon your changes.

The editing and formatting toolbar above the text-entry area provides options you may recognize from Site Setup and from Message Filtered Members. For more information on how to use these tools, please see the [“Style Controls for the Text Editor in Widgets \(Site Setup\), E-blasts, Message Center, and More”](#) topic in online help.

N “Attachments” area in review and in edit mode. Click on the “Upload file” button to locate a document on your computer or tablet. After you have attached the file, the module shows the document name. Click on the “x” to the left of the filename to remove the document. Use this area for PDFs, not the optional “Image” module shown on the following page.

Optional **O** “Button” static module in review and in edit mode. Replace the word “Button” with the text you want to appear on the button itself. Type or paste a link to the online destination you want the button to load when a message recipient clicks on the button in their individual message.



MESSAGE CENTER: CREATE CUSTOM TEMPLATES (Continued)

BUILD YOUR OWN CUSTOM MESSAGE CENTER TEMPLATES

Optional **P** “Image” static module, shown first in review mode and then in edit mode with an image added. To add an image, click on the “Browse” button to locate the file you want to display in the message. Note that this is a direct upload scenario from your computer or tablet to the message template.

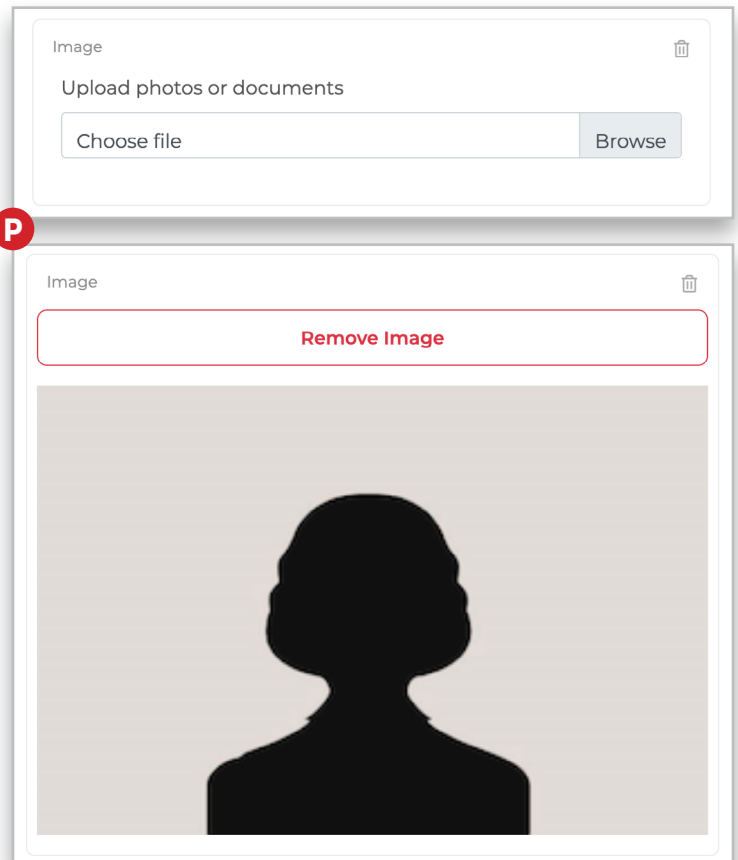
This module type is intended to use with GIF, JPG, and PNG files, not with PDF files. It is designed to display an image in the body of the message, not to attach a document for review.

To remove an image after you have added one, click on the “Remove Image” button.

To remove the “Image” static module entirely, click on the Delete icon (trash can).

How to change overall module order

To rearrange the vertical order in which Custom Template modules appear, simply drag and drop a module up or down on the template to change the sequence. You’ll see a black dot appear at the left margin between modules, indicating the vertical location into which the module will move.



MESSAGE CENTER: CREATE CUSTOM TEMPLATES (Continued)

BUILD YOUR OWN CUSTOM MESSAGE CENTER TEMPLATES

This example shows **Q** Custom Template setup/content and the **R** actual message that reaches a recipient. The community logo is pulled from the Admin Dashboard at {Account > Organization Info}

The elements of this message could have been dragged and dropped into a different order during editing. Note also how specific information replaces dynamic variables.

Cancel Snow Removal Save

Static Dynamic

1 Subject*
Organization Name snow removal scheduled for 8:00 a.m. today

2 Heading
Organization Name will instigate snow removal service this morning

3 Body
Member First Name, Organization Name has scheduled snow removal service for this morning.
Remember that Organization Name rules do not permit curbside parking, except for non-residents and visitors.
If any vehicle is at your curb, we will notify you at Member Email and will not clear your curbside.
If you are moving in at this time, please let us know.

4 Image
Upload photos or documents
Choose file Browse

5 Click here for more information

1 From: Covington Cove noreply@hoastart.com
R Subject: Covington Cove snow removal scheduled for 8:00 a.m. today

Covington Cove

2 Covington Cove will instigate snow removal service this morning

Janet, Covington Cove has scheduled snow removal service for this morning.

3 Remember that Covington Cove rules do not permit curbside parking, except for non-residents and visitors.

If any vehicle is at your curb, we will notify you at spam@ertia.com and will not clear your curbside.

If you are moving in at this time, please let us know.

4



5

Click here for more information

1 "Subject" line shows up in the recipient's e-mail inbox.

2 "Heading" above the body text signals the intent of the message.

3 "Body" content conveys most of the details of the message.

4 "Image" option displays a photo.

5 "Button" option provides a clickable way to send message recipients to a desired destination and/or to provide them with further information.

MESSAGE CENTER: EDIT CUSTOM MESSAGE TEMPLATES

TEMPLATES

Automated (12) Custom (3)

12 Templates

Search Templates

Showing 1 to 3 of 3 entries

Name	Subject	Date created	Date modified	Actions
Holiday Greetings!	Holiday greetings from Organization Name to you, Mem...	12/20/2025	12/20/2025	
Snow Removal	Organization Name snow removal scheduled for 8:00 a...	12/21/2025	12/21/2025	
Special Assessment, 2026	Organization Name has approved a Special Assessment ...	12/20/2025	12/20/2025	

Showing 1 to 3 of 3 entries

To edit a Custom Template, click on the “Message Center” tab in the vertical dashboard menu, and select **A** “Templates.” In the “TEMPLATES” window, locate the template you want to edit and click on the **B** “Actions” column’s three-dots menu. Select the “Edit” option.

Individual content modules have their own editing controls. Some contain text but do not include the editing toolbar shown on this **C** “Heading” module. All modules include an **D** Edit pencil to enter edit mode and a **E** Delete trash can icon to remove the module altogether.

The editing and formatting toolbar provides options you may recognize from Site Setup and from Message Filtered Members. For more information on how to use these tools, please see the [“Style Controls for the Text Editor in Widgets \(Site Setup\), E-blasts, Message Center, and More”](#) topic in online help.

Heading

Cancel Done

Heading

Styles Format Font Size A A ?

\$OrganizationName will instigate snow removal service this morning

MESSAGE CENTER: EDIT CUSTOM MESSAGE TEMPLATES (Continued)

TEMPLATES

Automated (12) Custom (3)

12 Templates

Search Templates

Showing 1 to 3 of 3 entries

Name	Subject	Date created	Date modified	Actions
Holiday Greetings!	Holiday greetings from Organization Name to you, Mem...	12/20/2025	12/20/2025	⋮
Snow Removal	Organization Name snow removal scheduled for 8:00 a...	12/21/2025	12/21/2025	⋮
Special Assessment, 2026	Organization Name has approved a Special Assessment ...	12/20/2025	12/20/2025	⋮

Showing 1 to 3 of 3 entries

⋮ Edit
⊗ Deactivate

To save changes to an individual module, such as this **K** “Subject” module, click on the **G** “Done” link. To cancel your changes and close the module without saving it, click on the **F** “Cancel” link.

For information on how to add static fields and dynamic content to a Custom Template, please see the [“Message Center: Create Custom Templates”](#) section of this guide.

To save your overall changes to the Custom Template, click on the **H** “Save” link at the top of the template-editing window. To cancel your changes and close the Custom Template without saving it, click on the **I** “Cancel” link.

Subject*

Subject

⋮ Cancel Done

TEMPLATE

← back to templates

Automated (12) Custom (3)

⋮ Cancel

Template Name (Required)

⋮ Save

MESSAGE CENTER: EDIT AUTOMATED TEMPLATES

The screenshot shows the 'TEMPLATES' window in the Message Center. The left sidebar contains a navigation menu with items like Onboarding, Admin Dashboard, Account, Manage Site, Membership, Households, Features, Forms, Payments, Financials, Message Center (highlighted), History, Templates (marked with a red 'A'), My Sites, Support (4), and Proptia. The main content area is titled 'TEMPLATES' and shows 'Automated (12)' and 'Custom (3)' tabs. Below the tabs, it says '12 Templates' and 'Showing 1 to 12 of 12 entries'. A search bar is present. A table lists 12 templates with columns for Name, Subject, Type, and Date modified. The first row is 'Invoice Late' with a red minus icon in the Name column. An 'Actions' column is visible for the first row, containing 'Edit' (marked with a red 'B') and 'Deactivate' buttons. The remaining 11 rows show various automated messages like 'Invoice Marked as Paid', 'Invoice Reminder', 'Invoice Sent', etc. The bottom of the table also shows 'Showing 1 to 12 of 12 entries'.

Name	Subject	Type	Date modified
Invoice Late	Member First Name, your invoice from Organizati...	Invoice Late	12/17/2025
Invoice Marked as Paid	Your invoice for Organization Name has received a ...	Invoice Marked as Paid	12/17/2025
Invoice Reminder	Member First Name, your invoice from Organizatio...	Invoice Reminder	12/17/2025
Invoice Sent	Member First Name, Organization Name has sent ...	Invoice Sent	12/17/2025
Invoice Sent Manually	Member First Name, Organization Name has sent ...	Invoice Sent Manually	12/17/2025
Member Registration	Member First Name, thank you for registering to t...	Member Registration	12/17/2025
Registration Approved	Member First Name, your request to join Organizat...	Registration Approved	12/17/2025
Registration Rejected	Member First Name, your request to join Organizat...	Registration Rejected	12/17/2025
Set Password Auto	Member First Name, please reset your online passw...	Set Password Auto	12/17/2025
Set Password Confirmation	Member First Name, you've set your Organization ...	Set Password Confirmation	12/17/2025
Set Password Manually Sent	Member First Name, please reset your online passw...	Set Password Manually Sent	12/17/2025
Set Password Registration Approved	Member First Name, welcome to Organization Na...	Set Password Registration Approved	12/17/2025

EDIT AUTOMATED MESSAGE CENTER TEMPLATES

Automated Message Center Templates provide the content of messages that the system sends out automatically to support software features. Through the Message Center, edit standard messages for dues and Member registration—and even deactivate them altogether.

Note that **if you deactivate an Automated Message Center Template, you also deactivate the feature that uses it.** Note also that you cannot create or delete Automated Message Center Templates, but you can edit/reset their contents.

To edit an Automated Template, click on the “Message Center” tab in the vertical dashboard menu, and select **A** “Templates.” In the “TEMPLATES” window, open the “Actions” column and choose **B** “Edit.” (Depending on your device-screen size and the type of template list you view, you may see an “Actions” column or a blue button with a “+” in it.)

MESSAGE CENTER: EDIT AUTOMATED TEMPLATES (Continued)

TEMPLATE

← back to templates

Automated (12) Custom (3)

Cancel **G** Invoice Late Reset Save

D Subject*
D Member First Name, your invoice from **G** Organization Name is now late.

E Heading
G Member First Name, **G** Organization Name sent you an invoice with a due date of **G** Invoice Due Date.

F Body
 We're emailing to tell you your payment is now late. Please send your payment as soon as possible. The attached PDF itemizes the details of how to pay. If you have any questions about this invoice, or if you believe you have received this message in error, please contact your organization's administrator through the website.

Static **G** Dynamic

General

- Organization Name
- Member First Name
- Member Last Name
- Member Email

Invoice

- Due Name
- Invoice ID
- Invoice Due Date
- Invoice Late Date

EDIT AUTOMATED MESSAGE CENTER TEMPLATES

When you edit an Automated Template in the “TEMPLATE” window, you begin with a set of required elements and standard content modules, shown above.

C “**Template Name**” (required) provides the template’s internal title. It is not visible to message recipients.

D “**Subject**” (required) appears on actual messages in a recipient’s inbox.

The editing window also includes modules for **E** “**Heading**” (optional) and **F** “**Body**” (optional). The “Heading” typically appears in larger type above the “Body,” which provides the overall message content. Both of these modules are

optional, but a message that does not include them may not offer much content or value to recipients.

The **G** field selection area enables you to add “Static” (not shown) and “Dynamic” (shown) items to your template. Use “Static” items to create additional content modules and “Dynamic” items to create text content that changes to reflect information about each individual message recipient.

MESSAGE CENTER: EDIT AUTOMATED TEMPLATES (Continued)

H “Static” items add content modules to your template. **I** “Dynamic” variables create context-sensitive text in “Static” modules, personalizing each individual message.

To add a “Static” content module to your template, drag and drop it from the **H** list of static modules to the editing window. Drag and drop individual “Static” modules vertically in the template window to change the order in which they appear in individual messages.

To remove a “Static” content module, click on the Delete icon (trash can) inside the individual module box.

To edit a “Static” content module, click on the Edit icon (pencil) inside the individual module.

To add a **I** “Dynamic” variable to a “Static” content module in the message, edit the module, and then drag and drop the “Dynamic” item into the text area, either on a line by itself or into existing text.

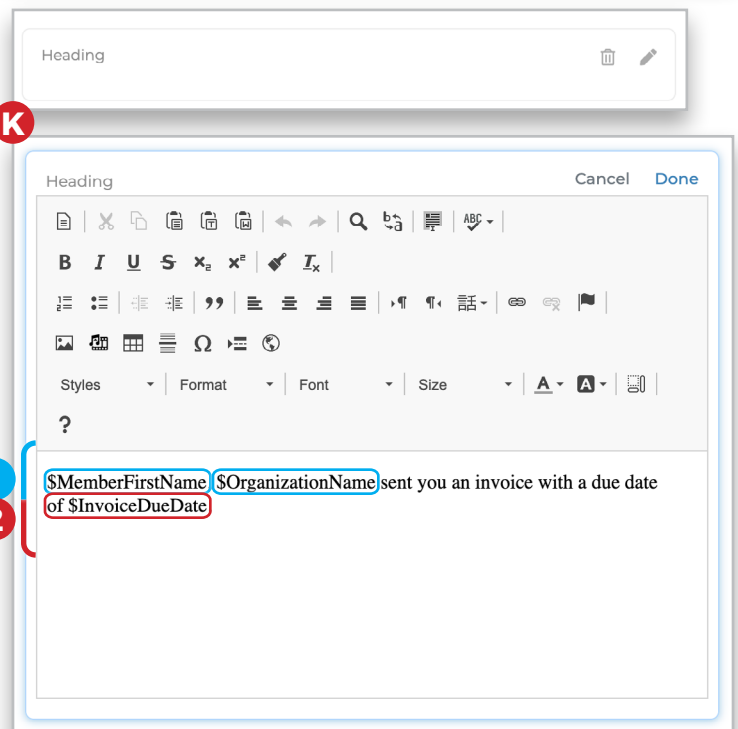
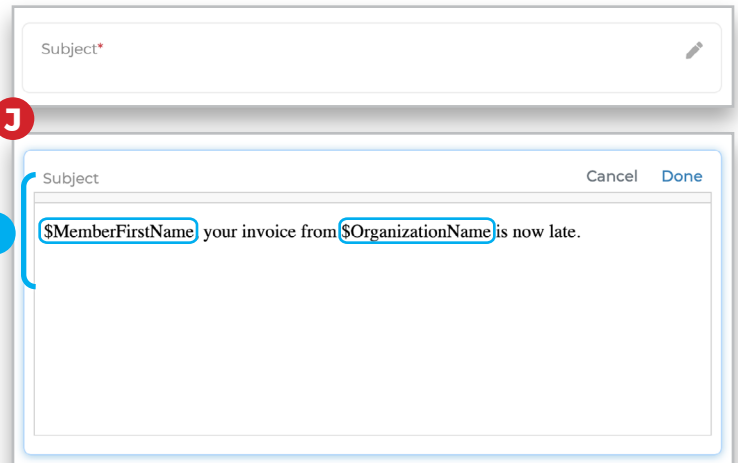
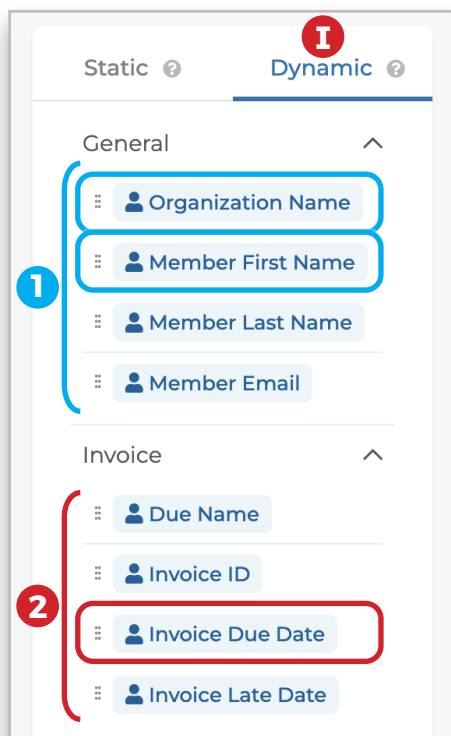
MESSAGE CENTER: EDIT AUTOMATED TEMPLATES (Continued)

J “Subject” static module, shown first in review mode and then in edit mode. Type or paste text into the text-entry area. Click on the “Done” link to complete your edit or the “Cancel” link to abandon your changes. The **1** “Dynamic” variables shown also work in Custom Templates.

To add a **I** “Dynamic” variable to a **J** “Static” content module, edit the module, and then drag and drop the “Dynamic” item into the text area, either on a line by itself or into existing text.

K “Heading” static module in review and in edit mode. Type or paste text into the text-entry area. Use the toolbar above the entry area to style your text and add other features to it. The editing and formatting toolbar provides options you may recognize from Site Setup and from Message Filtered Members. For more information on how to use these tools, please see the [“Style Controls for the Text Editor in Widgets \(Site Setup\), E-blasts, Message Center, and More”](#) topic in online help.

The **1** “General” variables also are available on Custom Templates. **2** “Invoice” fields only function on dues-related Automated Templates.



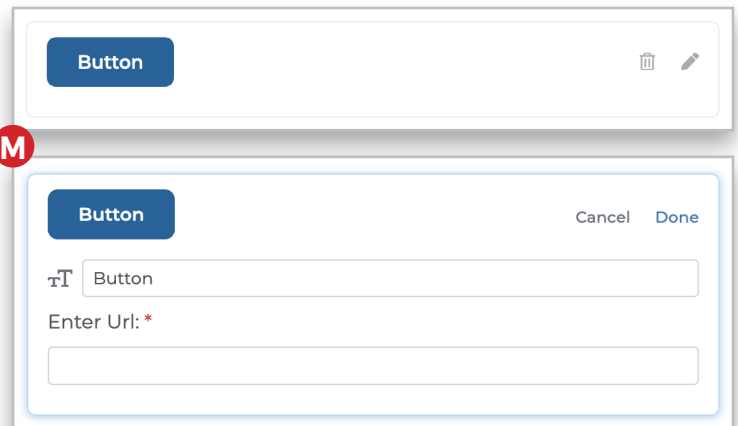
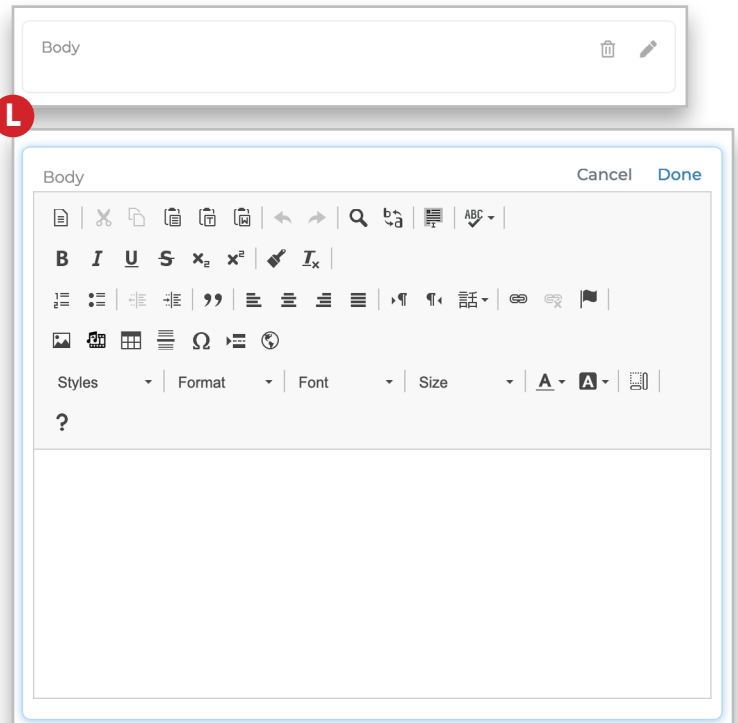
MESSAGE CENTER: EDIT AUTOMATED TEMPLATES (Continued)

L “Body” static module, shown first in review mode and then in edit mode. Type or paste your text into the text-entry area. Use the toolbar above the entry area to style your text and add other features to it. Click on the “Done” link to complete your edit or the “Cancel” link to abandon your changes.

The editing and formatting toolbar above the text-entry area provides options you may recognize from Site Setup and from Message Filtered Members. For more information on how to use these tools, please see the [“Style Controls for the Text Editor in Widgets \(Site Setup\), E-blasts, Message Center, and More”](#) topic in online help.

Optional **M** “Button” static module in review and in edit mode. Replace the word “Button” with the text you want to appear on the button itself. Type or paste a link to the online destination you want the button to load when a message recipient clicks on the button in their individual message.

Note, however, that Automated Templates contain buttons that link to online destinations. These buttons are not editable and are not shown in the Template Editor.



MESSAGE CENTER: EDIT AUTOMATED TEMPLATES (Continued)

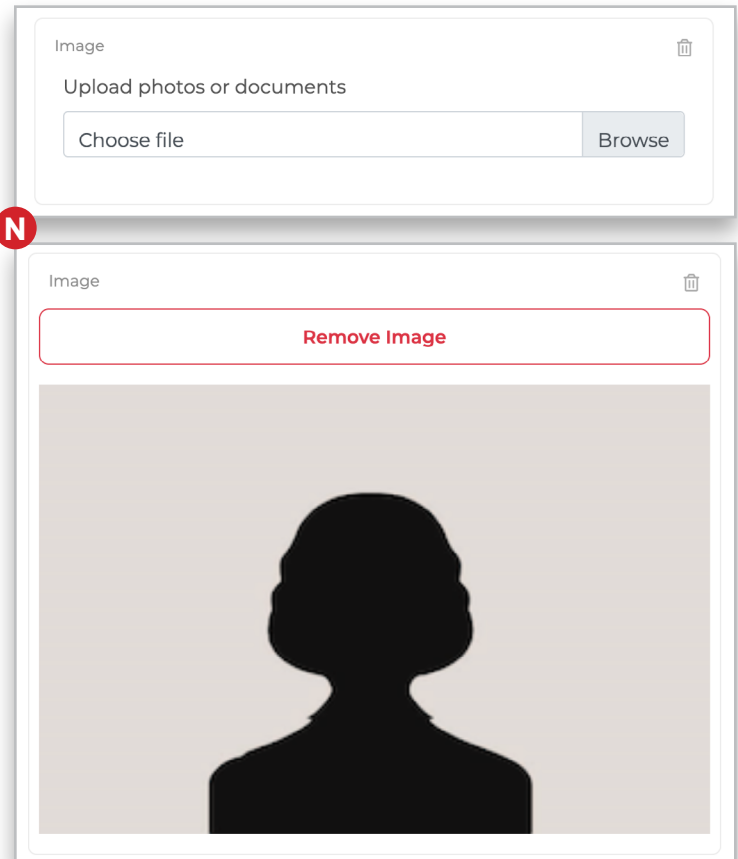
Optional **N** “Image” static module, shown first in review mode and then in edit mode with an image added. To add an image, click on the “Browse” button to locate the file you want to display in the message. Note that this is a direct upload scenario from your computer or tablet to the message template.

To remove an image after you have added one, click on the “Remove Image” button.

To remove the “Image” static module entirely, click on the Delete icon (trash can).

How to change overall module order

To rearrange the vertical order in which Custom Template modules appear, simply drag and drop a module up or down on the template to change the sequence. You’ll see a black dot appear at the left margin between modules, indicating the vertical location into which the module will move.



MESSAGE CENTER: EDIT AUTOMATED TEMPLATES (Continued)

This example shows **0** Automated Template setup/content and the **P** message that reaches a recipient. The community logo is pulled from the Admin Dashboard at [{Account > Organization Info}](#)

The elements of this message could have been dragged and dropped into a different order during editing. Note also how specific information replaces dynamic variables.

TEMPLATE

[← back to templates](#)

[Automated \(12\)](#) [Custom \(3\)](#)

Cancel

Invoice Late

Reset

Save

Subject*

[Member First Name](#), your invoice from [Organization Name](#) is now late.

Heading

[Member First Name](#), [Organization Name](#) sent you an invoice with a due date of [Invoice Due Date](#).

Body

We're emailing to tell you your payment is now late. Please send your payment as soon as possible. The attached PDF itemizes the details of how to pay. If you have any questions about this invoice, or if you believe you have received this message in error, please contact your organization's administrator through the website.

Static

Dynamic

General

[Organization Name](#)
[Member First Name](#)
[Member Last Name](#)
[Member Email](#)

Invoice

[Due Name](#)
[Invoice ID](#)
[Invoice Due Date](#)
[Invoice Late Date](#)

1

From: Covington Cove noreply@hoastart.com
Subject: Jane, your invoice from Covington Cove is now late.

P

Covington Cove

2

Jane, Covington Cove sent you an invoice with a due date of 1/15/2026.

3

We're emailing to tell you your payment is now late. Please send your payment as soon as possible. The attached PDF itemizes the details of how to pay. If you have any questions about this invoice, or if you believe you have received this message in error, please contact your organization's administrator through the website.

4

[View Site](#)

5

Covington Cove
Jane Webster
8626 Covington Lane
Emerson, Massachusetts 02135
(617) 454-9735
jane-webster@jane-webster.com

Date: 1/26/2026

Invoice			
Invoice #	Due Detail	Payment Due	Total Price
8038454	Association Dues	1/15/2026	\$360.00
			Total: \$360.00

1

"Subject" line shows up in the recipient's e-mail inbox.

2

"Heading" above the body text signals the intent of the message.

3

"Body" content conveys most of the details of the message.

4

Button is NOT generated by editable Automated Template content. This button is a standard, non-editable/non-removable component of the specific Automated message.

5

Attached PDF provides the actual invoice as part of the late-payment reminder.

This invoice does not use an optional "Image" module. You can add this module type to Automated Templates, but a late-payment reminder may not benefit from that type of embellishment. For information on how to implement an "Image" module, see the ["Create Custom Templates"](#) section of this guide.

MESSAGE CENTER: RESET AUTOMATED TEMPLATES

TEMPLATE

[← back to templates](#)

Automated (12)
Custom (2)

Cancel

Invoice Late

A
Reset
Save

Subject*

Member First Name

, we're writing to you because your invoice from

Organization Name

 is now late.

Heading

Member First Name

,

Organization Name

 sent you invoice #

Invoice ID

 with a due date of

Invoice Due Date

.

Body

We're contacting to remind you to make your remittance as soon as possible because as of the date of this message, we have not yet received your payment, which was due on

Invoice Due Date

.

The attached PDF itemizes how to pay. If you have any questions about this invoice, or if you believe you have received this message in error, please contact your organization's administrator through the

Organization Name

 website.

Image

Remove Image



Static

Dynamic

General

Organization Name

Member First Name

Member Last Name

Member Email

Invoice

Due Name

Invoice ID

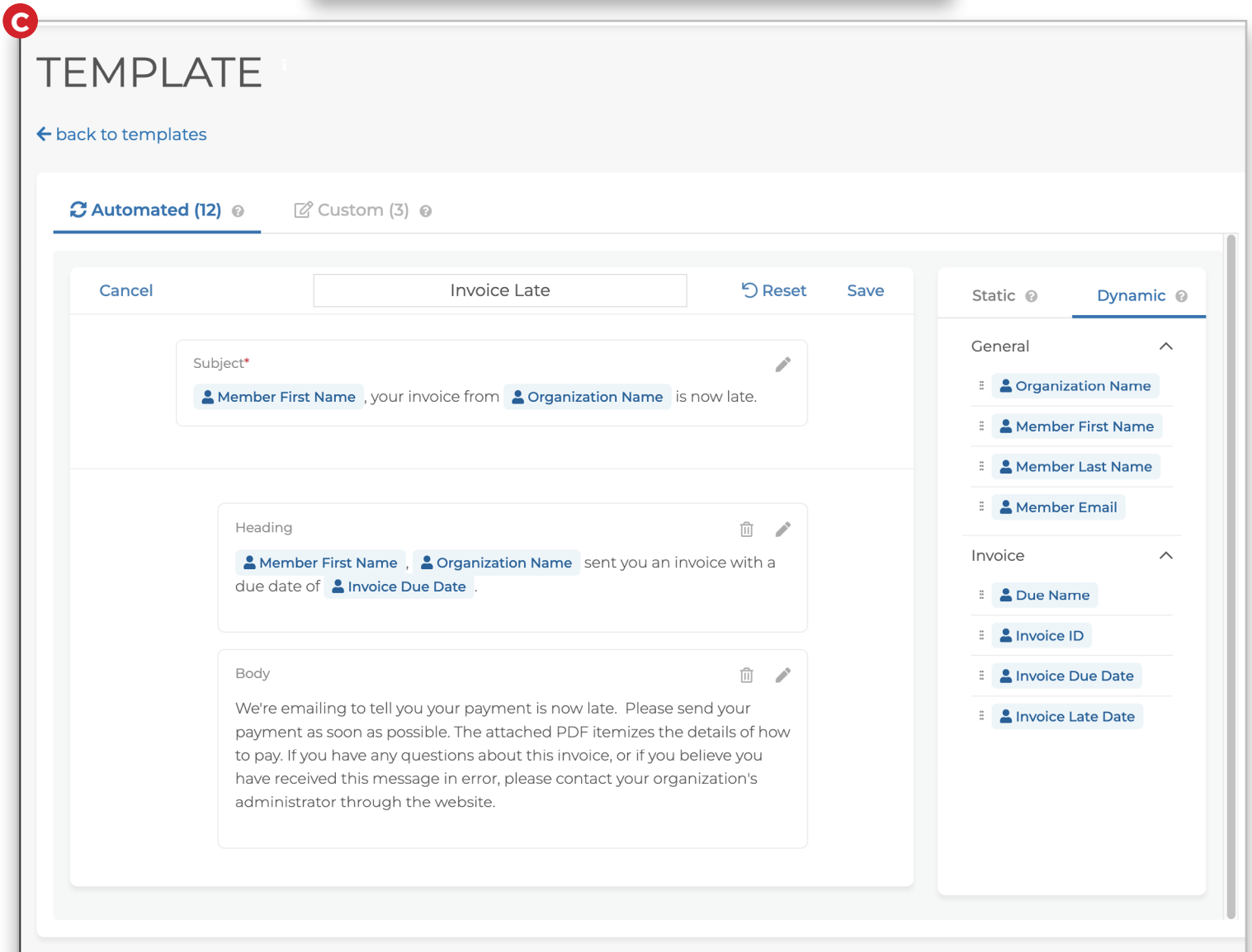
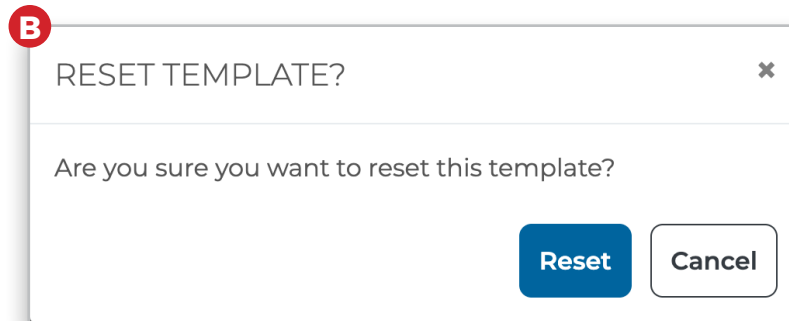
Invoice Due Date

Invoice Late Date

If you edit an Automated Template and decide that you want to return it to its original format and content, reset the template.

This edited Automated Template accompanies late invoices. To return it to its standard message content and remove the added "Image" module, click on the A "Reset" link.

MESSAGE CENTER: RESET AUTOMATED TEMPLATES (Continued)



In the **B** “RESET TEMPLATE?” window, confirm that you want to reset the template.

Once you reset the template, its **C** original text content and layout are restored.

Remember that **once you reset the template, all changes, edits, and additions are removed**

permanently, and any standard content that you have edited or removed reappears in its original form. This includes text edits, added fields and dynamic content, and any changes you make to the vertical order in which the modules appear.

MESSAGE CENTER: USE TEMPLATES TO SEND E-BLASTS

The screenshot shows the 'MEMBERS' window in the Hoastart interface. The left sidebar contains navigation links: Onboarding, Admin Dashboard, Account, Manage Site, Membership (selected), Members (A), Member Form, Member Approval, Committees, Tags, Boardroom, Sub-Admin Roles, Households, Forms, Payments, Financials (BETA), Message Center, My Sites, and Support. The main content area is titled 'MEMBERS' with a sub-header '22 Members'. It includes a search bar with 'Search All' and 'Search Members' options, a note about asterisked search categories, and toggle switches for 'Show Inactive' and 'Filter To Never Logged In'. Below this, it states 'Showing 1 to 20 of 22 entries (filtered from 24 total entries)'. A table lists member details, and a 'Members Actions' dropdown menu (B) is open, showing options like '+Add New Member', 'Email Management', 'Message Filtered Members' (C), 'Member Import', 'Download Member Data', 'Import Invoices or Balance', 'Download Invoices or Balance', 'Bulk Edit Filtered Members', 'Add a Tag to Filtered Members', and 'Remove a Tag from Filtered Members'.

MEMBER	PHONE	WALLET BALANCE	ST	ROLE	LAST LOGIN	ACTIVE	ACTIONS
Corey Bradford coreyb@cbradfordllc.com	413-371-8261	\$0.00	MA	Member	N/A	Active	⋮
Jaime Coronado coronado@Coronadoditconsulting.com	413-663-2385	\$0.00	MA	Member	N/A	Active	⋮
Max Delroy delroy@delroyengineering.com	413-998-8989	\$0.00	MA	Member	N/A	Active	⋮
Carole Dwiggins carole.dwiggins@dwigginsfurniture.com	413-998-1603	\$0.00	MA	Member	N/A	Active	⋮
Della Granby della.granby@granbyhardware.com	413-594-1881	\$0.00	MA	Member	N/A	Active	⋮
Jarrod Hammill jarrod.hammill@hammillbuilders.com	413-594-6208	\$0.00	MA	Member	N/A	Active	⋮
Lisa Hathaway spam+123@ertia.com	413-594-0989	\$0.00	NY	Member +	11/3/2022	Active	⋮
Steve Hurwitz steve.hurwitz@hurwitzinsurance.com	413-545-9919	\$0.00	MA	Member	N/A	Active	⋮
Steve Kelby steve.kelby@kelbyinsurance.com	413-545-9919	\$0.00	MA	Member	N/A	Active	⋮

USE CUSTOM TEMPLATES IN “MESSAGE FILTERED MEMBERS”

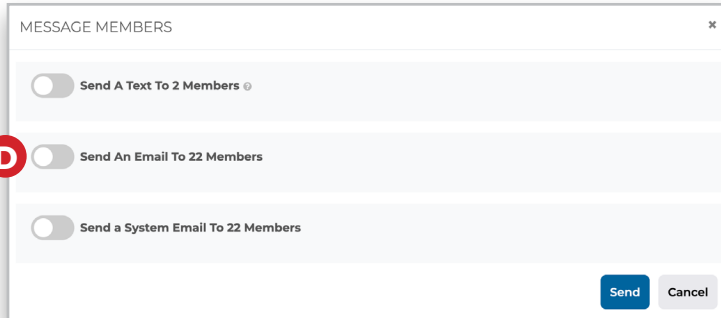
Message your community—or just a select group of Members—with custom e-blasts that you create and schedule. These messages can target your entire community, or just Members for whom you search.

Create your Custom Template first. It determines all the message content for your e-blast, from the Subject line down to the text, links, graphics, and attachments you include.

To send an e-blast based on a Custom Template, click on the “Membership” tab in the vertical dashboard menu, and select **A** “Members.” In the “MEMBERS” window, click on the **B** “Members Actions” button and choose **C** “Message Filtered Members.”

MESSAGE CENTER: USE TEMPLATES TO SEND E-BLASTS (Continued)

USE CUSTOM TEMPLATES IN “MESSAGE FILTERED MEMBERS”



MESSAGE MEMBERS

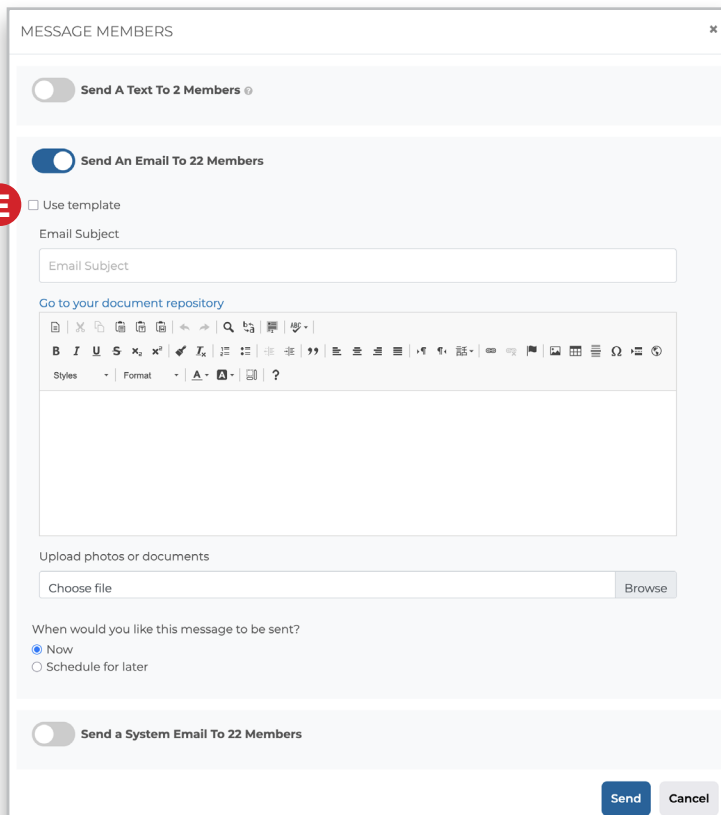
☐ Send A Text To 2 Members

D ☒ Send An Email To 22 Members

☐ Send a System Email To 22 Members

Send Cancel

In the “MESSAGE MEMBERS” window, activate the **D** “Send An Email to XX Members” toggle switch. (“XX” represents the number of Members either in your overall community or in the results of a search you performed to narrow the list).



MESSAGE MEMBERS

☐ Send A Text To 2 Members

☒ Send An Email To 22 Members

E ☒ Use template

Email Subject

Email Subject

Go to your document repository

Upload photos or documents

Choose file Browse

When would you like this message to be sent?

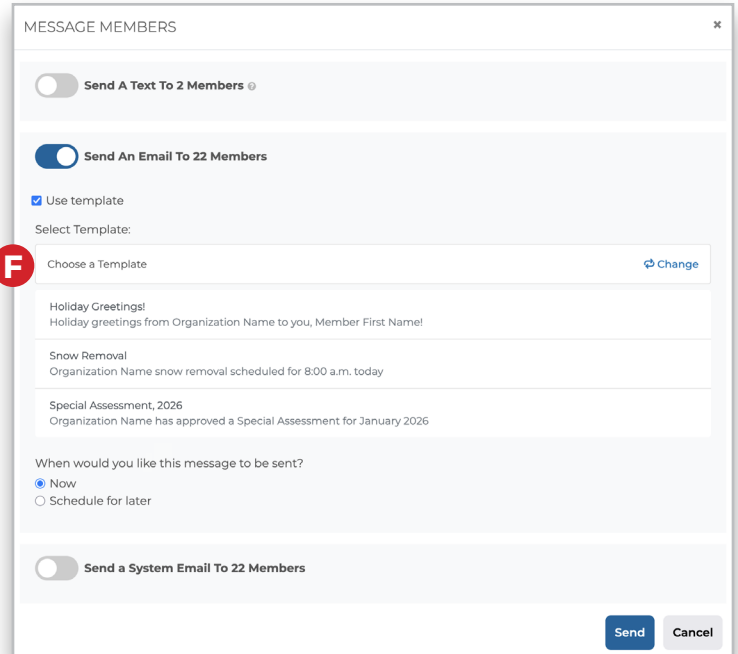
☒ Now

☐ Schedule for later

☐ Send a System Email To 22 Members

Send Cancel

Now you can activate the **E** “Use template” checkbox.



MESSAGE MEMBERS

☐ Send A Text To 2 Members

☒ Send An Email To 22 Members

☒ Use template

Select Template:

F Choose a Template [Change](#)

Holiday Greetings!
Holiday greetings from Organization Name to you, Member First Name!

Snow Removal
Organization Name snow removal scheduled for 8:00 a.m. today

Special Assessment, 2026
Organization Name has approved a Special Assessment for January 2026

When would you like this message to be sent?

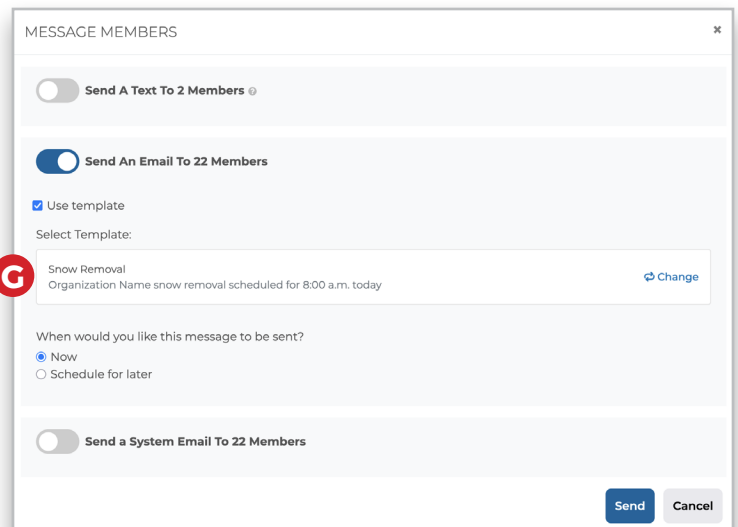
☒ Now

☐ Schedule for later

☐ Send a System Email To 22 Members

Send Cancel

This further enables you to access the **F** “Select Template” dropdown menu, which lists all the Custom Templates you’ve created.



MESSAGE MEMBERS

☐ Send A Text To 2 Members

☒ Send An Email To 22 Members

☒ Use template

Select Template:

G Snow Removal
Organization Name snow removal scheduled for 8:00 a.m. today [Change](#)

When would you like this message to be sent?

☒ Now

☐ Schedule for later

☐ Send a System Email To 22 Members

Send Cancel

In the “Select Template” dropdown menu, select the **G** Custom Template you want to use for this message transmission.

MESSAGE CENTER: USE TEMPLATES TO SEND E-BLASTS (Continued)

USE CUSTOM TEMPLATES IN “MESSAGE FILTERED MEMBERS”

MESSAGE MEMBERS

☐ Send A Text To 22 Members

☒ Send An Email To 22 Members

☒ Use template

Select Template:

Snow Removal
Organization Name snow removal scheduled for 8:00 a.m. today [Change](#)

When would you like this message to be sent?

☒ Now

☐ Schedule for later

Select date/time in Eastern Time

Zone: *

Please select...

☐ Send a System Email To 22 Members

[Send](#) [Cancel](#)

MESSAGE MEMBERS

☐ Send A Text To 22 Members

☒ Send An Email To 22 Members

☒ Use template

Select Template:

Snow Removal
Organization Name snow removal scheduled for 8:00 a.m. today [Change](#)

When would you like this message to be sent?

☐ Now

☒ Schedule for later

Select date/time in Eastern Time

Zone: *

12/22/2025 8:18 AM

☐ Send a System Email To 22 Members

[Send](#) [Cancel](#)

To send your message right away, set the “When would you like this message to be sent?” radio buttons to **H** “Now.” To specify a transmission date and time in the future, set the “When would you like this message to be sent?” radio buttons to **H** “Schedule for later.” Next, click in the “Please select...” box to bring up the date-and-time picker.

Click on the **J** “Send” button to send a message immediately or schedule one for later.

K

Your e-blast has been queued. Transmission times may vary depending on overall current message volume.

MESSAGE MEMBERS

☐ Send A Text To 22 Members

☒ Send An Email To 22 Members

☒ Use template

Select Template:

Snow Removal
Organization Name snow removal scheduled for 8:00 a.m. today [Change](#)

When would you like this message to be sent?

☐ Now

☒ Schedule for later

Select date/time in Eastern Time

Zone: *

Please select...

☐ Send a System Email To 22 Members

[Send](#) [Cancel](#)

A **K** message-queued message confirms that you have sent or scheduled your message.

NOTE: The message-scheduling component of this feature is available regardless of whether you use a Custom Template or compose your message in the “MESSAGE MEMBERS” window.

NOTE ALSO: “Message Filtered Members” also includes scheduling in Dues & Fees (on the Summary page for an individual dues item, via the “Dues Items” button) and through One-Time Charges (on the Summary page for an individual OTC, via the “One-Time Charge Actions” button.)

Make your selection and click on the **I** “Set” link.