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CUSTOMER'S COURSE CATALOG

Memberships

Dashboard

Members

Membershi...

▾ Workflow M...

Event Settings

Event & Session Tags

System Email Templates

...ts

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WELCOME TO
GLUE UP ACADEMY

What We Offer You!

Over 160+ Glue Up Platform Learning Items that can be used to educate your self on your Glue Up Platform.

Click on the section descriptions below to jump to those sections.

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10+ Certification Programs

A structured collection of courses and learning materials delivered through the Glue Up Academy. These curriculums are associated with the following training programs:

- Basic Platform Overview Curriculum (BPO) (5)
- Advanced Platform Certification Program Curriculums (Online) (5)

Advance Platform Certification Program
For Glue Up Adminstrators

- Memberships
- Finance

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Jump to Cert. Pro.

Click the green buttons to jump to that section

Glue Up Platform Playlist

19 Playlists

A structured collection of courses and learning materials delivered through the Glue Up Academy. This consist of the following playlists:

- Platform Module Processes Playlist (6)
- Platform Module Settings Playlist (1)
- Platform Module Overview Playlist (6)
- Platform Module Articles Playlist (6)

Jump to Playlist

Glue Up Platform Courses

58 Courses

A series of short 5-to-15-minute online courses on the Glue Up Platform is a concise and time-efficient learning module that provides focused educational content. Leveraging the platform's features, these courses offer learners brief yet impactful experiences, allowing them to acquire knowledge and skills efficiently. This consist of the following platform module topics:

- Contacts Module Courses (12)
- Memberships Module Courses (9)
- Events Module Course (21)
- Campaigns Module Courses (6)
- Finance Module Courses (4)

Jump to Courses

Glue Up Platform Articles

59+ Articles

A written piece of content created to offer instruction on the Glue Up platform. It typically consists of informative or educational material related to topics such as event management, community engagement, membership management, or Finance. This consist of the following platform module topics:

- Contacts Module Articles (10)
- Memberships Module Articles (24)
- Events Module Articles (8)
- Campaigns Module Articles (7)
- Finance Module Articles (5)
- Communities Module Articles (1)
- Miscellaneous Articles (4)

Jump to Articles

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GLUE UP
PLATFORM MODULE
COURSES

WHAT'S IN THE SECTION?

- This section will provide descriptions and provisional access to these platform courses.

- Courses provide detailed guidance on system settings and processes for Glue Up's platform modules.

- Glue Up offers modules for contacts, event management, member engagement, event campaigns and community building.

- Note: If you have an active subscription to Glue Up Academy, you can access these courses from this manual.

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Glue Up Platform Courses

58 Courses

A series of short 5-to-15-minute online courses on the Glue Up Platform is a concise and time-efficient learning module that provides focused educational content. Leveraging the platform's features, these courses offer learners brief yet impactful experiences, allowing them to acquire knowledge and skills efficiently. This consist of the following platform module topics:
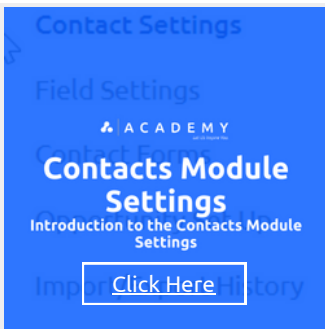
- Contacts Module Courses (12)
- Memberships Module Courses (9)
- Events Module   Course (21)
- Campaigns Module Courses (6)
- Finance Module Courses (4)

Click on the listing to jump to the page

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Contacts Module Courses

WHAT ARE THESE CONTACTS MODULE COURSES?

This is a series of concise 5 to 15-minute courses, you will be introduced to the powerful Glue Up Contacts Module and learn how to execute various processes with ease. Designed to be robust and user-friendly, the Glue Up Contact module equips organizations with a comprehensive suite of tools and features to efficiently manage their contact database. With its intuitive interface, advanced search capabilities, and customizable options, this module streamlines contact management processes, empowering businesses to enhance engagement, foster relationships, and fuel their growth.

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Contacts Module Settings
Introduction to the Contacts Module Settings

[Click Here]

Contact Module - Introduction to the Contacts Module Settings

In this course, we will introduce you to the Contacts modules settings. In the Contacts module, you can collect and manage all contact information for both individuals and companies that are added to your database. Only members of your team with access to the platform will have access to this information.
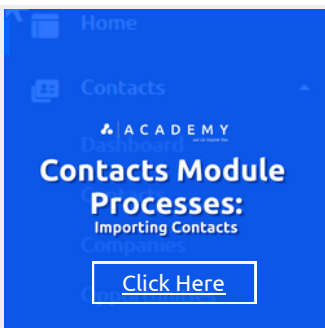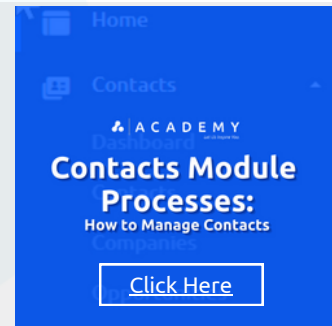In this course we will:

- View the Dashboard with an overview of contact information.
- View a complete list of your Contacts and Companies.
- Create lists and smart lists.
- Manage all your business Opportunities.
- Validate your contacts' information synchronization.

Duration: 15 minutes

Contacts Module - How to Manage Contacts

This course is designed to provide practical demonstrations on effectively managing contacts within the Glue Up Contact module. You will learn how to effortlessly organize and maintain your contact database by accessing the Contacts module and utilizing tools such as filters, search options, and sorting capabilities to identify specific contacts based on criteria or attributes. From there, you will gain valuable skills in updating contact information, adding notes or tags, assigning categories, and tracking interactions, empowering you to nurture relationships effectively and optimize the value of your contacts.

Duration: 5 minutes

ACADEMY

Contacts Module Processes:
How to Manage Contacts

[Click Here]

Contacts Module - Importing Contacts

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Contacts Module Processes:
Importing Contacts

[Click Here]

This course provides step-by-step guidance on importing contacts into the Contacts module of Glue Up. You will learn how to efficiently populate your contact database by preparing your contact data in a compatible format such as Excel. By accessing the Contacts module, selecting the "Import Contacts" option, and following the prompts to upload your prepared file, map the fields, and complete the import process, you will ensure a smooth and efficient transfer of your contacts into the Glue Up Contact module.

Duration: 10 minutes

Contacts Module - Merging Contacts

This course focuses on guiding you through the process of merging contacts in the Contacts module. You will learn how to efficiently consolidate duplicate or overlapping information for a clean and organized contact database. By navigating to the Contacts module and selecting the primary contact to keep, you can access the merge feature. From there, simply choose the secondary contact(s) you want to merge, and the system will intelligently combine the information, eliminating duplicates and ensuring a streamlined and organized database.

Duration: 10 minutes

ACADEMY

Contacts Module Processes:
Merging Contacts

[Click Here]

Back to Section Page
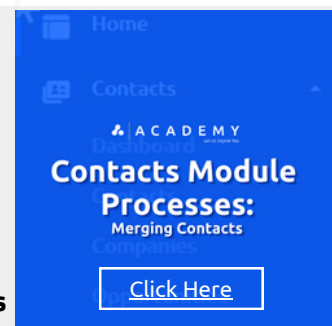
Contacts Module Courses

Contacts Module - Opportunities

In this course, we will explore the Opportunities function within the Glue Up Contacts module and guide you through the essential processes. You will learn how to create opportunities to efficiently manage and leverage potential business prospects. By accessing the Contacts module, selecting the desired contact, and clicking on the "Opportunities" tab, you can easily create opportunities by inputting details like opportunity type, stage, expected revenue, and associated tasks. Through accurate opportunity tracking, you will streamline your workflow, prioritize leads, and nurture relationships effectively to foster business growth.

Duration: 15 minutes

Contacts Module - Navigating through the Contacts Module

This course provides a comprehensive exploration of the Contacts module in Glue Up, offering practical demonstrations to enhance your proficiency. Gain valuable insights into navigating the module seamlessly, performing tasks such as searching and exporting contacts, managing dashboard columns, and configuring field settings for a personalized experience. Discover efficient techniques for creating and uploading new contacts, accessing quick and full-view information for each contact, and utilizing quick actions associated with individual contacts, optimizing your contact management process and empowering you to achieve greater productivity.

Duration: 10 minutes

Contacts Module - Understanding the Contacts Dashboard

This course provides an introduction to the Contacts module's dashboard, focusing on practical techniques and demonstrations. You will learn how to maximize your usage of the Glue Up Contacts module by accessing and navigating the dashboard. Discover the wide range of tools available, including filters, search options, and sorting capabilities, enabling you to efficiently find and manage contacts based on specific criteria. Additionally, you will gain insights into customizing the dashboard by selecting preferred widgets, rearranging their positions, and configuring settings to meet your specific contact management requirements, ensuring a personalized and effective user experience.

Duration: 10 minutes

Contacts Module - How to Create a Contact List

This comprehensive course is designed to provide practical demonstrations on creating contact lists using the Contacts module in Glue Up. You will learn how to effectively organize group contacts based on specific criteria, streamlining your contact management process. By accessing the Contacts module and utilizing tools such as filters, search options, and sorting capabilities, you can easily identify desired contacts. Then, by utilizing features like "Add to List" or "Create New List," you will create customized contact lists, enabling you to categorize and manage contacts efficiently.

Duration: 15 minutes

Contacts Module - How to Create a Smart List

This comprehensive course provides step-by-step demonstrations on creating Smart lists within the Glue Up Contacts module. You will learn how to leverage the power of Smart lists to automatically group contacts based on dynamic criteria. By accessing the Contacts module, selecting filters and conditions to define your desired criteria, and configuring the Smart list, you can effortlessly segment and manage contacts in real-time. The Smart list will continuously update itself as contacts meet the defined criteria, ensuring a convenient and efficient way to stay organized and streamline your contact management process.
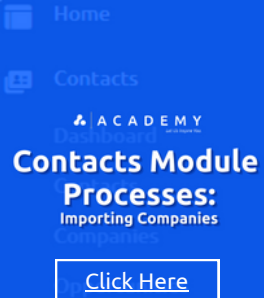
Duration: 10 minutes

Back to Section Page

Contacts Module Courses

Contacts Module - Importing Companies

This comprehensive course provides practical demonstrations of importing companies into the Glue Up Contacts module. You will learn how to efficiently populate your database with existing company information by preparing your data in a compatible format, such as Excel, including essential details like company name, address, and contact information. By accessing the Contacts module, selecting the "Import Companies" option, and following the prompts to upload your prepared file, map the fields, and complete the import process, you will ensure a seamless and efficient transfer of company data into the Glue Up Contacts module, streamlining your contacts management workflow.

Duration: 10 minutes

Contacts Module Processes: Importing Companies

[Click Here]

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Campaigns Module Courses

WHAT ARE THESE
CAMPAIGNS MODULE COURSES?

In this series of short and concise 5-to-10-minute courses, you will be introduced to the Glue Up Campaigns Module and its various functionalities. Designed to enhance your email marketing endeavors, the Glue Up Campaigns module offers a robust and user-friendly platform. With this module, you can effortlessly create and send personalized email campaigns, segment your audience, track performance metrics, and leverage analytics to optimize your campaigns and achieve impactful results for your organization.

Campaigns Module - Introduction to the Campaigns Module Settings

Campaigns Module Settings
Introduction to the Campaigns Module Settings

Click Here

The Glue Up Campaigns module offers a range of customizable email options, allowing you to create, send, and track tailored campaigns, event invitations, notifications, and surveys to your contact and subscription lists. Gain valuable insights into the performance of your email campaigns on an individual level through campaign analytics, ensuring you stay informed and engaged with your community. Additionally, you have the ability to create and manage Subscriptions and Committees lists, add or remove members as needed, and access your Suppression list to track bounced and unsubscribed recipients for effective email management.
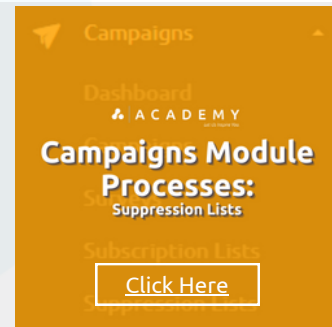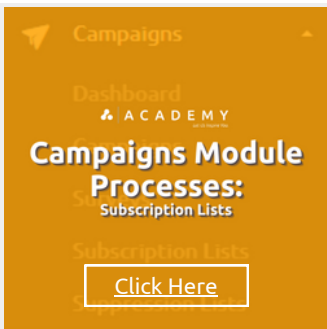
Duration: 10 minutes

Campaigns Module - Suppression Lists

This comprehensive course provides step-by-step demonstrations on creating Suppression lists in the Campaigns module of Glue Up. Suppression lists are essential for effective email management and compliance, as they allow you to track and exclude recipients who have previously unsubscribed or experienced bounced emails. By implementing Suppression lists, you ensure that your email campaigns adhere to regulations and maintain a high deliverability rate, enabling you to focus on engaging and nurturing your active and interested audience while upholding best practices.

Campaigns Module Processes:
Suppression Lists

Click Here

Duration: 3 minutes

Campaigns Module - Subscription Lists

Campaigns Module Processes:
Subscription Lists

Click Here

This course focuses on the utilization of Subscription Lists within Glue Up's Campaigns module. Subscription Lists play a crucial role in effectively managing and organizing your contacts. By creating segmented lists based on preferences, interests, or other criteria, you gain the ability to send tailored campaigns that resonate with your audience. With the power of Glue Up's Subscription Lists, you'll enhance contact nurturing, boost engagement, and achieve superior campaign outcomes.
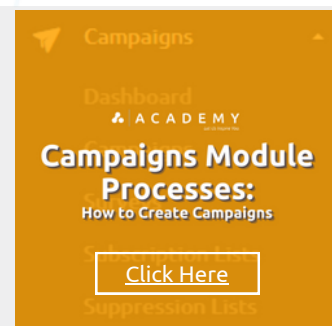
Duration: 3 minutes

Campaigns Module - How to Create Campaigns

In this comprehensive course, we will guide you through the process of creating impactful campaigns using the Glue Up Campaigns module. Learn how to access the module, select the "Create New Campaign" option, and leverage the intuitive interface to design and customize compelling email content. Explore the various features such as personalization, recipient list selection, and scheduling options, enabling you to effectively engage and communicate with your contacts in a targeted and impactful manner.

Campaigns Module Processes:
How to Create Campaigns

Click Here

Duration: 5 minutes

Back to Section Page

Campaigns Module Courses

Campaigns Module - How to Create Surveys

In this comprehensive course, we will guide you through the process of creating surveys using the Glue Up Campaigns module. Discover how to access the module, select the "Create New Campaign" option, and utilize the intuitive interface to design and customize engaging survey forms. Learn how to add diverse question types, distribute surveys to your desired recipients, and gather valuable feedback and insights to drive informed decisions for your organization's growth and improvement.

Duration: 3 minutes

Click Here

Campaigns Module - How to Access Campaign Reports

In this comprehensive course, we will guide you on how to access and utilize campaign reports in the Glue Up Campaigns module. Learn the simple steps to navigate to the Campaigns module and select the specific campaign you want to analyze. Explore the detailed reports that offer valuable insights into crucial metrics like open rates, click-through rates, bounce rates, and more. By leveraging these informative reports, you can evaluate campaign performance, make informed decisions, and enhance your email marketing strategy to achieve optimal results.

Duration: 2 minutes

Click Here

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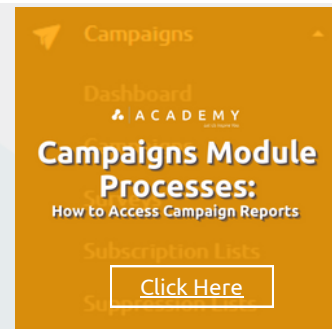
WHAT ARE THESE
EVENTS MODULE COURSES?

This short course series offers a comprehensive introduction to the Glue Up Events Module, highlighting essential processes for planning and executing events. Gain the efficiency to organize and promote online or offline events of any size, utilizing features such as creating compelling branded event pages, offering diverse ticket types with VIP options, and implementing coupons and special pricing. Customize registration forms, select payment options, and simplify email marketing by effortlessly sending newsletters, event invitations, and branded emails in a few simple steps.

Click Here
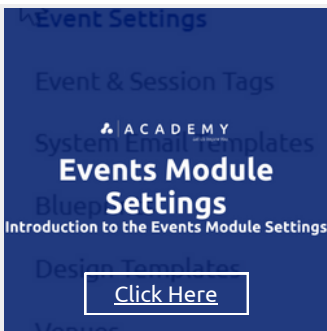
## Events Module - Introduction to the Events Module Settings

This course provides a detailed exploration of the settings available in the Glue Up Events module. You will learn how to customize and optimize event management by leveraging the platform's diverse range of settings. From configuring registration and ticketing options to fine-tuning email communication settings and access controls, you will gain complete control over the configuration and management of your events. By mastering these platform settings, you will be able to streamline processes, elevate attendee experiences, and extract valuable insights through comprehensive reporting and analytics

Duration: 15 minutes

Events Module - Venues & Badges

This course provides a comprehensive overview of the Venues and Badges features in the Glue Up Events module. With Venues, you'll learn how to efficiently manage and highlight event locations by providing attendees with detailed information and interactive maps. Explore how Badges enable you to create personalized identification labels, promote networking opportunities and simplify participant identification during events. These powerful features empower organizers to create immersive experiences while streamlining logistical aspects and enhancing attendee management.

Duration: 4 minutes

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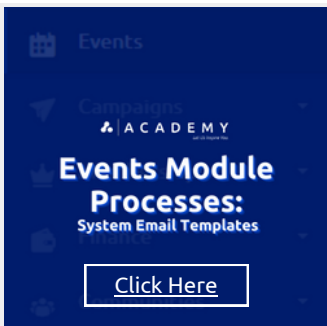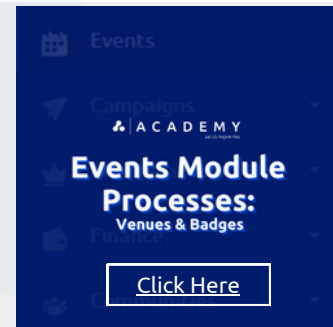
Events Module - System Email Templates

This course offers a comprehensive demonstration of the System Email Templates feature within the Glue Up Events module. You'll learn how these pre-designed email templates play a crucial role in automating and streamlining email communications throughout the event lifecycle. Explore how organizers can effortlessly send professional and well-crafted emails, including event registration confirmations, reminders, updates, and post-event follow-ups. By leveraging system email templates, attendees can expect timely and consistent communication, enhancing their overall event experience.

Duration: 3 minutes

Events Module - Event & Session Tags

This course provides a comprehensive demonstration of the Event & Session Tags feature in the Glue Up Events module. You'll learn how these valuable features assist organizers in effectively categorizing and organizing events and sessions. Explore how event tags allow for easy labeling and grouping of events based on themes, topics, or attributes, enabling attendees to discover and navigate relevant events effortlessly. Discover how session tags further enhance the attendee experience by classifying individual sessions, allowing participants to identify and attend sessions that align with their interests or professional needs.

Duration: 4 minutes

Click Here

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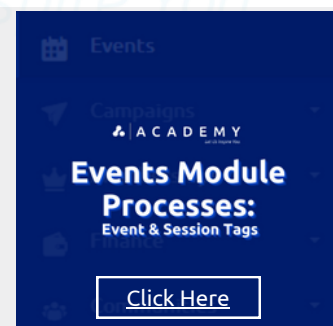
Events Module Courses

Events Module - Design Templates

This course provides a comprehensive demonstration of the design templates available in the Glue Up Events module. Explore how these templates offer a convenient solution for creating visually appealing event materials effortlessly. Discover the wide range of customization options available for event pages, registration forms, emails, and promotional materials. By utilizing design templates, event organizers can save time, ensure brand consistency, and produce professional-looking designs that leave a memorable impact on attendees.

Duration: 4 minutes

Events Module Processes: Design Templates
Click Here

Events Module - 00: How to Create an Event - *Introduction*

In this course, we will walk you through the introductory phase of creating an event using the Glue Up Events module. This phase is carefully crafted to offer a smooth and intuitive experience. You will receive step-by-step guidance, beginning with the essential elements of your event, including its title, date, time, and location. From there, you'll learn how to customize the event description, incorporate relevant images, and set up registration options. By mastering this phase, you will establish a solid foundation for your event, ensuring accurate and efficient capture of crucial information, resulting in a captivating and enticing event listing.

Duration: 3 minutes

Events Module Processes: 00: How to Create an Event - *Introduction*
Click Here

Events Module - 01: How to Create an Event - *Set Up*

This course offers a step-by-step demonstration of the Set-Up function in the Glue Up Events module, focusing on creating and configuring the foundational aspects of your event. You'll learn how to set up crucial event details such as date, time, location, and description. Explore key steps including selecting event categories, defining registration options, and customizing event branding. By mastering the Set-Up process, you'll have the ability to create a well-structured and engaging event that aligns with your specific requirements, ensuring a successful event experience.

Duration: 9 minutes

Events Module Processes: 01: How to Create an Event - *Set Up*
Click Here

Events Module - 02: How to Create an Event - *Publish*

This course offers a step-by-step demonstration of the Publish function in the Glue Up Events module, focusing on creating and making your event visible to attendees. You'll learn how to review and finalize event details, ensuring accurate information is presented. Explore the process of setting up event visibility options and activating registration to effectively showcase and promote your event. By mastering the Publish function, you'll gain the ability to maximize attendance and engagement, ensuring the success of your event.

Duration: 4 minutes

Events Module Processes: 02: How to Create an Event - *Publish*
Click Here

Events Module - 03: How to Create an Event - *Promote*

This course offers a comprehensive demonstration of the promotional strategies available within the Glue Up Events module. You'll learn how to effectively utilize the powerful promotion tools to maximize event visibility and attract attendees. Explore features such as invitations, campaigns, and advertisements, and discover how to leverage these tools to effectively promote your event to a targeted audience. By mastering these techniques, you'll be able to reach the right participants, generate excitement, and ensure a successful turnout for your event.

Duration: 2 minutes

Events Module Processes: 03: How to Create an Event - *Promote*
Click Here

Back to Section Page

Events Module Courses

Events Module - 04: How to Create an Event - *Manage*

This course offers a comprehensive demonstration of the "Manage" function within the Glue Up Events module, focusing specifically on creating events. You'll receive a step-by-step guide on navigating the user-friendly interface, setting up essential event details like date, time, and location, customizing registration forms to collect necessary information, and configuring ticketing options. By mastering the process of event creation in the Glue Up Events module, you'll gain the proficiency to efficiently plan, organize, and execute successful events that are tailored to your specific requirements.

Duration: 5 minutes

Events Module
Processes:
04: How to Create an Event - *Manage*

Click Here

Events Module - 05: How to Create an Event - *Follow Up*

This course provides step-by-step guidance on following up and creating events using the Glue Up Events module. You'll learn how to effectively utilize the user-friendly interface and robust features of the module. Discover how to send follow-up emails to attendees, collect post-event feedback through surveys, and leverage comprehensive reporting tools to analyze event performance. By mastering these techniques, you'll be able to establish seamless communication, extract valuable insights, and continuously enhance your event planning and execution within the Glue Up Events module.

Duration: 4 minutes

Events Module
Processes:
05: How to Create an Event - *Follow Up*

Click Here

Events Module - 00: Blueprints - *Introduction*

This course focuses on showcasing the Introduction Blueprints specifically designed for the Glue Up Events module. These blueprints provide event organizers with a structured framework to create captivating and informative introductory content for attendees. Organizers can utilize these blueprints to introduce the event, highlight essential features, and effectively communicate crucial information like schedules, agendas, and speaker profiles. By leveraging these Introduction Blueprints, organizers can captivate and inform attendees, setting the stage for a successful and engaging event experience.

Duration: 2 minutes

Events Module
Processes:
00: Blueprints - *Introduction*

Click Here

Events Module - 01: Blueprints - *General Settings*

This course focuses on showcasing the General Settings Blueprints specifically designed for the Glue Up Events module. These blueprints provide event organizers with a comprehensive framework to customize and configure various general settings within the event management system. Organizers can fine-tune settings related to event registration, ticketing, notifications, branding, and other critical aspects. By utilizing these General Settings Blueprints, organizers can personalize the event experience according to their specific needs, ensuring a smooth and cohesive event management process that aligns with their goals and objectives.
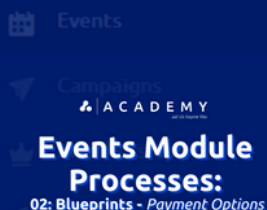
Duration: 3 minutes

Events Module
Processes:
01: Blueprints - *General Settings*

Click Here

Events Module - 02: Blueprints - *Payment Options*

This course focuses on showcasing the Payment Options Blueprints specifically designed for the Glue Up Events module. These blueprints provide event organizers with a streamlined framework for efficiently managing financial transactions and payment methods during event registration and ticketing processes. They offer a variety of customizable payment options, such as credit cards, online payment gateways, and offline methods, enabling organizers to cater to the diverse preferences of attendees. By integrating secure and convenient payment solutions, these blueprints ensure a seamless and hassle-free experience for attendees, ultimately enhancing their overall satisfaction during event registration and ticket purchases.

Duration: 2 minutes

Events Module
Processes:
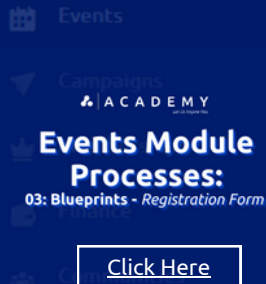02: Blueprints - *Payment Options*

Click Here

Back to Section Page

Events Module Courses

Events Module - 03: Blueprints - *Registration Form*

This course focuses on showcasing the Registration Form Blueprints specifically designed for the Glue Up Events module. These blueprints provide event organizers with a customizable framework to create registration forms that align with their specific event requirements. Organizers can easily design and configure registration forms with fields to collect attendee information, preferences, and other relevant details. By utilizing these Registration Form Blueprints, organizers can streamline the registration process, gather accurate attendee data, and ensure a smooth experience for participants, ultimately enhancing their event planning and management capabilities.
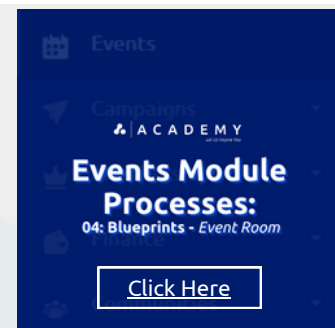
Duration: 1 minutes

Events Module Processes:
03: Blueprints - *Registration Form*
Click Here

Events Module - 04: Blueprints - *Event Room*

TThis course focuses on showcasing the Event Room Blueprints specifically designed for the Glue Up Events module. These blueprints provide event organizers with a visual representation of individual rooms within a venue, offering comprehensive details on room layouts, seating arrangements, and key features. By utilizing these Event Room Blueprints, organizers can effectively plan and optimize the utilization of each space, ensuring seamless logistics and creating a customized experience for attendees based on the unique requirements of each room.
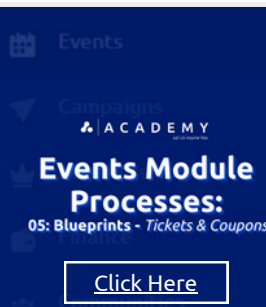
Duration: 2 minutes

Events Module Processes:
04: Blueprints - *Event Room*
Click Here

Events Module - 05: Blueprints - *Tickets & Coupons*

This course focuses on showcasing the Tickets & Coupons Blueprints specifically designed for the Glue Up Events module. These blueprints provide event organizers with a structured framework to effectively manage ticketing and promotional offers. Organizers can create and customize a variety of ticket types, pricing tiers, and discount coupons to cater to different segments of attendees. By utilizing the Tickets & Coupons Blueprints, event organizers can streamline ticket sales, track attendee registrations, and implement targeted marketing strategies, resulting in an enhanced ticketing experience and maximizing event attendance.
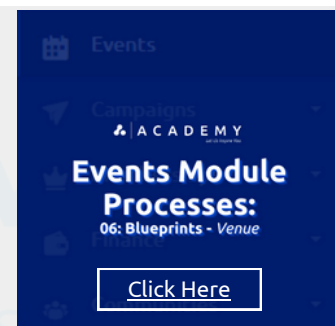
Duration: 3 minutes

Events Module Processes:
05: Blueprints - *Tickets & Coupons*
Click Here

Events Module - 06: Blueprints - *Venue*

This course focuses on showcasing the Venue Blueprints specifically designed for the Glue Up Events module. These blueprints offer a detailed and visual representation of event venues, providing organizers with a comprehensive overview of the space and other essential elements. By utilizing these Venue Blueprints, event organizers can effectively plan and optimize the utilization of the venue, ensuring a seamless flow and an enriched experience for attendees
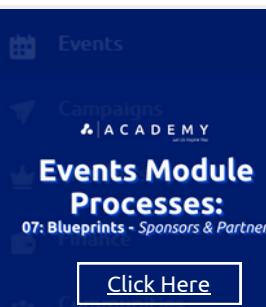
Duration: 1 minutes

Events Module Processes:
06: Blueprints - *Venue*
Click Here

Events Module - 07: Blueprints - *Sponsors & Partners*

This course provides a comprehensive demonstration of the Sponsors & Partners Blueprints feature in the Glue Up Events module. You'll learn how to effectively showcase and manage sponsors and partners, creating visually appealing and customizable displays that highlight their involvement and support. Explore the use of Sponsors & Partners Blueprints to enhance brand visibility, establish valuable partnerships, and elevate the sponsorship experience at your events. By mastering this feature, you'll have the ability to create impactful displays that attract sponsors, foster collaborations, and contribute to the overall success of your events.

Duration: 2 minutes

Events Module Processes:
07: Blueprints - *Sponsors & Partners*
Click Here

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Events Module Courses

Events Module - 08: Blueprints - *Layout & Design*

In this course, you will learn about the Layout & Design phase of the Blueprints associated with the Glue Up Events module. This phase is crucial for organizing and managing events effectively. It starts with creating detailed blueprints that outline the event's goals, timelines, and necessary resources. Then, you will delve into the layout phase, where you will discover how to design the event's physical and virtual spaces, such as floor plans, seating arrangements, and interactive elements. Finally, the design phase will teach you how to bring the blueprint and layout to life by incorporating branding, aesthetics, and user experience considerations. By the end of the course, you will be equipped to create cohesive and engaging event experiences.

Duration: 2 minutes

Events Module - 09: Blueprints - *Badges*

This course provides a comprehensive demonstration of Badges Blueprints within the Glue Up Events module. You'll learn how to design and customize badges for event participants, enhance networking opportunities and seamless identification. Explore the creation of visually appealing identification labels that promote branding, provide essential attendee information, and elevate the professional image of your event. By mastering Badges Blueprints, you'll have the ability to create badges that leave a lasting impression and contribute to a successful event experience.

Duration: 2 minutes

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Memberships Module Courses
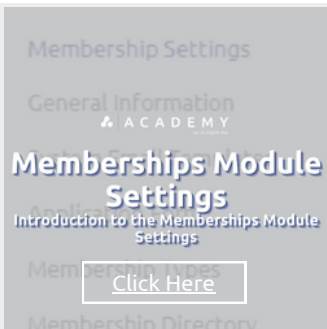
WHAT ARE THESE MEMBERSHIPS MODULE COURSES?

Discover the Glue Up Membership Module and learn how to effectively execute various membership processes through a series of short, easily digestible courses lasting 5 to 10 minutes each. This module simplifies the management of membership applications, renewals, and payments, providing organizations with an intuitive platform that ensures a seamless experience for their members. With automated approval workflows, customizable membership levels, and an array of benefits, the Glue Up Membership module offers a comprehensive solution to enhance the membership journey for both organizations and their valued members.

Memberships Module - Introduction to the Memberships Module Settings
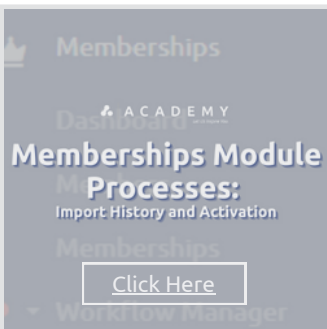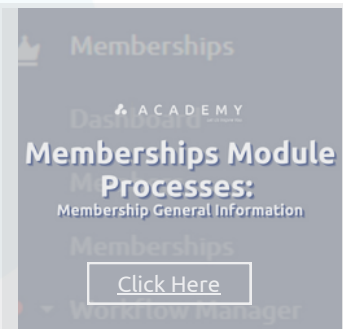
Join this course to explore the powerful settings available in the Glue Up Membership module. Unlock the ability to customize and enhance the membership experience according to your organization's needs. Learn how to configure membership levels with exclusive benefits, manage approval processes through automated workflows or manual reviews, and set up flexible payment options including defining fees, payment frequencies, and accepted methods. With these comprehensive settings at your disposal, the Glue Up Membership module empowers you to create a tailored membership program that aligns perfectly with your organization's goals.

Duration: 15 minutes

Click Here

Memberships Module - Membership General Information

Join this course to explore the Membership General Information features offered by the Glue Up Membership module. Discover how this centralized platform streamlines the management of membership-related data, enabling organizations to store and access detailed member profiles encompassing contact details, membership history, and preferences. Learn how to leverage the module's tracking capabilities to monitor membership status, event attendance, and engagement levels, empowering organizations with valuable insights for targeted communication strategies and delivering personalized member experiences.

Duration: 3 minutes

Click Here

## Memberships Module - Import History and Activation

Join this course to explore the powerful Import History and Activation features offered by the Glue Up Membership module. Learn how to efficiently manage the importation of membership data and activate members in bulk, saving valuable time and effort. Discover how the comprehensive import history log enables organizations to track and review past import activities, ensuring transparency and accuracy in membership management. By automating the activation of multiple members simultaneously, this feature guarantees a seamless onboarding experience for new members.

Duration: 5 minutes

Click Here

Memberships Module - Members/Memberships

Join this course to explore the Members/Memberships functionality offered by the Glue Up Membership module. Discover how this centralized platform enables organizations to efficiently manage their members and memberships, streamlining operations and enhancing member experiences. Learn how to leverage comprehensive member profiles that store vital information like contact details, membership history, and preferences. Gain insights into tracking membership status, event attendance, and engagement levels, allowing organizations to personalize communication and deliver tailored experiences that maximize member satisfaction and retention.

Duration: 4 minutes

Click Here

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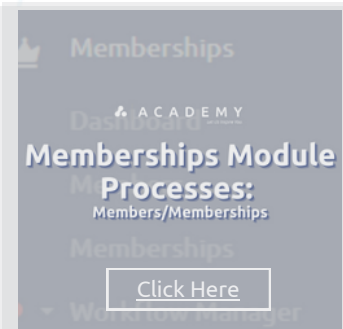
Memberships Module **Courses**

Memberships Module - Membership Applications

Join this course to explore the Membership Applications feature provided by the Glue Up Membership module. Discover how this module simplifies the management of membership applications through its intuitive and user-friendly interface. Learn how organizations can seamlessly collect and review membership applications, ensuring a smooth and efficient application process. Explore the customization options for application forms and the implementation of automated workflows for approval, allowing organizations to streamline the membership application journey and effectively attract and onboard new members.
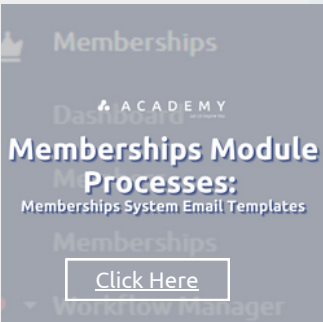
Duration: 2 minutes

Memberships Module - Membership Directory

This course offers a hands-on demonstration of the Membership Directory feature within the Glue Up Memberships module. The Membership Directory serves as a powerful tool, seamlessly integrated into the module, enabling users to maintain a comprehensive database of their organization's members. Through this feature, users can effortlessly search, filter, and retrieve detailed profiles of each member, including essential information like contact details, roles, and engagement history. The Membership Directory's intuitive interface and extensive capabilities simplify member management, promoting enhanced communication and collaboration across the organization.

Duration: 2 minutes

Memberships Module - Memberships System Email Templates

This course provides a comprehensive demonstration of the Memberships System Email Templates feature within the Glue Up Memberships module. These templates serve as a vital tool, providing organizations with pre-designed email templates to streamline and personalize communication with members. By leveraging these templates, organizations can effortlessly send automated emails for membership renewal reminders, event notifications, and other crucial updates, ultimately saving time while ensuring consistent and effective member engagement through targeted and professional email communications.
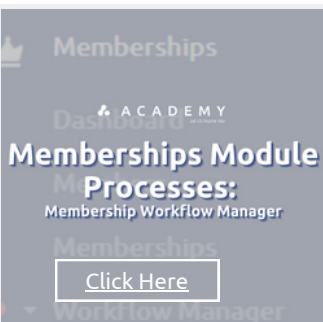
Duration: 2 minutes

Memberships Module - Membership Types

This course provides a comprehensive demonstration of the Membership Types feature within the Glue Up Memberships module. Membership Types play a vital role in the module, empowering organizations to classify and establish distinct membership levels or tiers within their program. By utilizing Membership Types, organizations can effortlessly create personalized membership packages with exclusive benefits, access levels, and pricing structures. This feature enhances membership management capabilities, allowing organizations to efficiently cater to the diverse needs of their members, ensuring a personalized experience and streamlined membership administration.

Duration: 9 minutes

Memberships Module - Memberships Workflow Manager

This course offers a comprehensive demonstration of the Memberships Workflow Manager feature within the Glue Up Memberships module. The Memberships Workflow Manager is a robust tool that simplifies and automates the entire membership management process. It empowers organizations to customize and define workflows for tasks such as membership applications, approvals, and renewals. By leveraging the Memberships Workflow Manager, organizations can optimize their operational efficiency, ensure consistent and efficient membership management, and deliver a seamless experience for administrators and members alike.

Duration: 4 minutes

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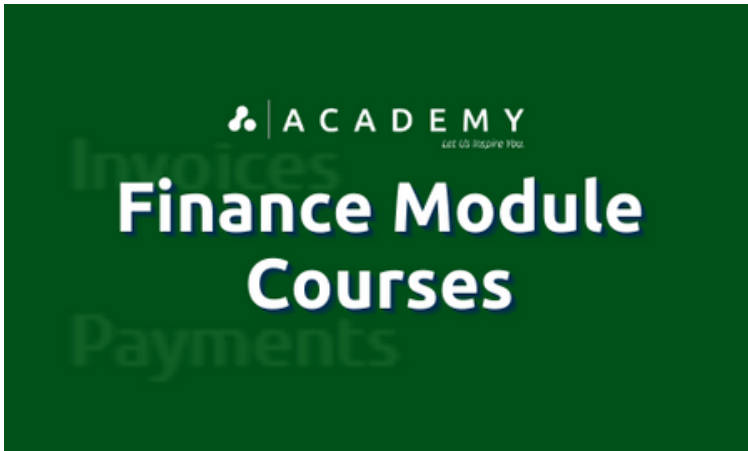
WHAT ARE THESE
FINANCE MODULE COURSES?

This series of short, 5-to-10-minute courses serves as an introduction to the Glue Up Finance Module, covering essential processes that can be executed. The Finance module offers a comprehensive set of processes aimed at streamlining and automating various financial tasks within an organization. These processes encompass budgeting, invoicing, payment collection, expense tracking, and financial reporting. By leveraging the Finance module, organizations can effectively manage their financial workflows, ensuring accurate bookkeeping, timely invoicing, seamless payment processing, and comprehensive financial analysis. Through these courses, participants will gain valuable knowledge to enhance their financial management capabilities, improve efficiency, and make informed decisions based on insights into their financial performance.

Finance Module - Introduction to the Finance Module Settings

This course provides a comprehensive demonstration of the settings associated with the Glue Up Finance module. These settings offer organizations a wide array of customization options to fine-tune their financial management system according to their specific requirements. Users can define and personalize accounting rules, chart of accounts, tax settings, payment gateways, and currency preferences. By harnessing the power of the Glue Up Finance module's settings, organizations can establish a dynamic and adaptable financial framework, optimizing financial operations for precision and efficiency.

Duration: 10 minutes
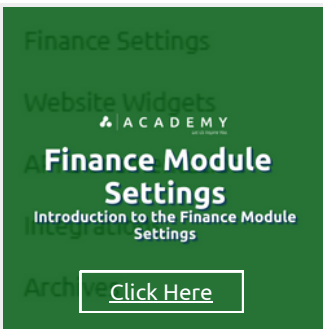
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Finance Module - Invoices

This course offers a comprehensive demonstration of the invoicing feature within the Glue Up Finance module. Invoices play a vital role in the module, providing organizations with a streamlined and efficient solution for generating and managing their billing processes. With the invoicing feature, users can easily create professional invoices, customize invoice templates, and automate the generation and delivery process. The system also enables organizations to track payment statuses, generate payment reminders, and maintain a comprehensive record of all issued invoices. By harnessing the invoicing capabilities of the Glue Up Finance module, organizations can optimize their billing operations, enhance cash flow management, and ensure accurate financial records.
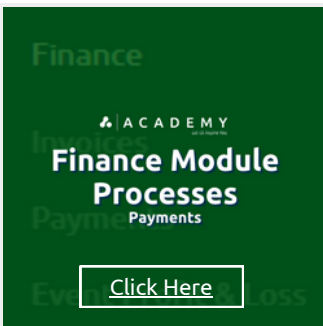
Duration: 5 minutes
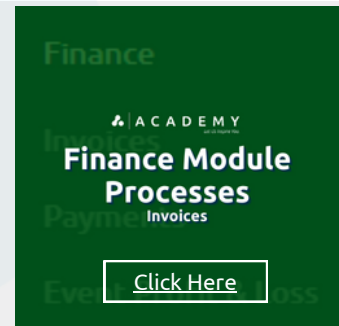
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Finance Module - Payments

This course provides a comprehensive demonstration of the payment feature within the Glue Up Finance module. Payments play a crucial role in the module, offering organizations a secure and efficient solution for managing transactions. With the payment feature, users can effortlessly collect and process payments from various sources, including credit cards, bank transfers, and online payment gateways. The system provides robust payment tracking capabilities, enabling organizations to monitor payment statuses, generate receipts, and reconcile transactions with ease. By harnessing the payment functionalities of the Glue Up Finance module, organizations can streamline their financial operations, enhance revenue management, and ensure a seamless payment experience for their customers and members.

Duration: 5 minutes

[Click Here]

Finance Module - Events Profit & Loss

This course offers a comprehensive demonstration of the Events Profit & Loss feature within the Glue Up Finance module. The Events Profit & Loss feature plays a crucial role in providing organizations with a holistic understanding of their financial performance in relation to events. Users will learn how to effectively track and analyze event revenue and expenses, calculate profitability, and generate detailed profit and loss statements. By harnessing the power of the Events Profit & Loss feature, organizations can gain valuable insights into their event finances, make data-driven decisions, and optimize their event planning and management processes to enhance profitability.

Duration: 5 minutes

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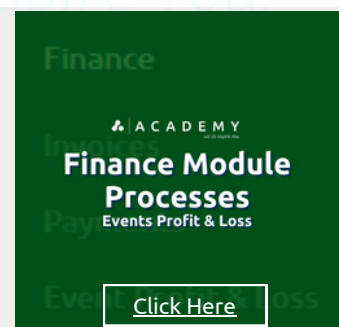
GLUE UP
PLATFORM MODULE
ARTICLES

WHAT'S IN THIS SECTION?

- This section will provide descriptions and provisional access to these platform articles.

- Articles offer step-by-step guidance for configuring system settings and understanding processes in Glue Up's platform module.

- Note: If you have an active subscription to Glue Up Academy, you can access these articles from this manual

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Glue Up Platform Articles

59+ Articles

A written piece of content created to offer instruction on the Glue Up platform. It typically consists of informative or educational material related to topics such as event management, community engagement, membership management, or Finance. This consist of the following platform module topics:

- Contacts Module Articles (10)
- Memberships Module Articles (24)
- Events Module Articles (8)
- Campaigns Module Articles (7)
- Finance Module Articles (5)

Click on the listing to jump to the page

LET US
INSPIRE YOU

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WHAT ARE THESE
CONTACTS MODULE ARTICLES?

This series of articles offers detailed technical guidance on effectively utilizing the Glue Up Contacts module. Designed as a comprehensive solution, it provides organizations with a centralized platform to manage and organize contact information. With its user-friendly interface and a range of features such as customizable fields, contact lists, and advanced search capabilities, the module streamlines contact management processes, improves data accuracy, and strengthens relationships with contacts. By following these articles, users will gain the knowledge and skills needed to optimize their contact management workflows and achieve better results in engaging with their contacts.

Contacts Module - Segment your CRM with Contact Lists and Smart Lists

Sorting your organization's contacts and companies into lists lets you access the profiles you need in seconds. A contact list or company list allows you to add records manually into a list, it is static and will not change. Smart lists are however dynamic: they are created based on your filtered criteria, therefore new records might be added or removed into smart lists based on if they match your filter criteria.

Contacts Module - Bulk Add Contacts to Corporate Memberships

This article provides an in-depth overview of the Bulk Add Contacts to Corporate Memberships process within the Glue Up Contacts module. The feature serves as a valuable time-saving tool, simplifying the task of adding multiple contacts to corporate memberships. Users will learn how to efficiently import and assign contacts to corporate memberships in bulk, minimizing manual data entry and optimizing workflow efficiency. By leveraging this feature, organizations can effectively manage and organize their corporate memberships by swiftly associating multiple contacts with the appropriate memberships, leading to enhanced membership administration and improved overall operational efficiency.

Contacts Module - Opportunity Types and Stages

This article provides a comprehensive overview of the Opportunity Types and Stages within the Glue Up Contacts module. The module offers valuable tools for organizations to manage and track their sales and business development processes effectively. Readers will gain insights into how Opportunity Types can be used to categorize and classify different types of business opportunities, while Opportunity Stages help visualize the progress of each opportunity through various stages of the sales pipeline. By leveraging these features, organizations can streamline their sales activities, gain valuable insights into their sales pipeline, and make informed decisions to maximize revenue and drive business growth.

Contacts Module – Opportunities

This article provides an in-depth exploration of the Opportunity feature within the Glue Up Contacts module. The Opportunity feature serves as a vital tool for organizations to efficiently manage their sales and business development endeavors. Readers will gain insights into how this feature offers a centralized platform for tracking and nurturing potential business opportunities, enabling users to record and monitor essential details like leads, contacts, interactions, and associated tasks. By leveraging the power of the Opportunity feature, organizations can streamline their sales processes, track progress, and successfully convert opportunities into revenue, thereby fueling their business growth.

Contacts Module - Contact & Smart Lists

This article provides an in-depth exploration of the Contact lists and Smart Lists features within the Glue Up Contacts module. Contact lists empower users to create personalized lists based on specific criteria or segmentation, enabling targeted communication and engagement with specific contact groups. Smart Lists, on the other hand, automatically update based on predefined rules, ensuring that contacts dynamically populate into relevant lists. By leveraging Contact lists and Smart Lists, organizations can streamline their contact management processes, enhance communication strategies, and achieve more effective engagement with their contacts, resulting in improved outcomes and productivity.

Contacts Module - Tracking Imports for CRM Contacts

This article explores the Tracking Imports feature for CRM Contacts in the Glue Up Contacts module. It focuses on two crucial functionalities: Contact Lists and Smart Lists. Contact Lists allow users to create personalized lists based on specific criteria, enabling targeted communication and engagement with specific contact groups. Smart Lists, on the other hand, automatically update according to predefined rules, streamlining contact management by dynamically populating relevant lists. By leveraging these Contact & Smart Lists features, organizations can optimize their contact management processes, refine communication strategies, and foster improved engagement with their contacts.

Contacts Module – Field Settings

This article delves into the Field Settings feature within the Glue Up Contacts module. Field Settings provides a wide range of customization options for managing contact information effectively. Users have the flexibility to personalize the fields and attributes associated with their contacts to meet their organization's unique needs and data requirements. By leveraging Field Settings, organizations can efficiently capture and categorize pertinent ensuring a comprehensive and customized approach to contact management within the Glue Up platform.

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Contacts Module Articles

Contacts Module - Import and Export Contacts

This article provides an in-depth exploration of the Import and Export Contacts function within the Glue Up Contacts module. It outlines a seamless and efficient process for managing contact data. Users can effortlessly import existing contact information from external sources, ensuring a smooth transition of data into the module. Additionally, the export feature enables organizations to extract contact data in a structured format, simplifying external sharing and analysis. By leveraging the import and export functionality, users can enhance their contact management, preserve data integrity, and foster seamless collaboration with external systems.

Contacts Module - Merging Contacts and Companies

This article provides a comprehensive guide to the Merging Contacts and Companies function within the Glue Up Contacts module. The merging process is designed to simplify data management by consolidating duplicate entries and improving data accuracy. Users can effortlessly merge multiple contact or company profiles into a single, unified record, eliminating redundancy and maintaining a clean and organized database. By harnessing the merging functionality, organizations can streamline their contact and company management processes, prevent data fragmentation, and gain a holistic view of their relationships for more effective engagement and communication strategies.

Contacts Module - Contacts Module Guide

This comprehensive manual explores the functionalities and benefits of the Glue Up Contacts module. Designed as a powerful tool, it serves as a centralized hub for organizing and managing contact information within organizations. With its customizable fields, contact lists, and import/export capabilities, the module streamlines contact management processes, optimizes communication strategies, and fosters enhanced engagement with contacts. By following this manual, users will gain a deep understanding of how to leverage the Glue Up Contacts module to effectively streamline their contact management workflows and achieve better results in engaging with their contacts.

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Campaigns Module Articles

WHAT ARE THESE
CAMPAIGNS MODULE ARTICLES?

This series of articles offers comprehensive technical guidance on utilizing the Glue Up Campaigns module. Designed as a robust platform, it facilitates the seamless optimization of marketing and communication endeavors. Organizations can leverage its features, including email marketing, automated workflows, and detailed analytics, to create, manage, and track campaigns with precision. By harnessing the capabilities of the module, organizations can enhance audience engagement, monitor campaign performance, and attain their marketing objectives with increased efficiency and effectiveness.

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Campaigns Module Articles:
Campaign Report

Click Here

Campaigns Module - Campaign Report

This informative article dives into the Campaign Report functionality in the Glue Up Campaigns module. The Campaign Report provides organizations with valuable insights and analytics on the performance of their campaigns. It delivers comprehensive data on crucial metrics like email open rates, click-through rates, and overall campaign engagement. By utilizing the Campaign Report, organizations can evaluate the effectiveness of their campaigns, make informed decisions based on data, and optimize future marketing efforts to achieve improved results and engagement with their target audience.

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Campaigns Module Articles:
Advantages of Using a Dedicated IP Address for Email Marketing

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Campaign Module - Advantages of Using a Dedicated IP Address for Email Marketing

This informative article explores the numerous benefits of utilizing a dedicated IP address for email marketing in conjunction with the Glue Up Campaigns module. By using a dedicated IP, you can enhance the deliverability and sender reputation of your emails by isolating your email activity from others, reducing the risk of being impacted by someone else's sending behavior. Moreover, a dedicated IP offers greater control and customization, enabling you to implement specific email authentication protocols and sender policies to optimize email deliverability. Lastly, it provides flexibility and scalability, allowing you to maintain a consistent sending reputation and effortlessly handle higher email volumes as your marketing efforts expand, resulting in more effective email campaigns.

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Campaigns Module Articles:
Creating, Managing and Importing Subscription Lists

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Campaigns Module - Creating, Managing and Importing Subscription Lists

This article provides comprehensive guidance on how to create, manage, and import subscription lists in the Glue Up Campaigns module. The process is designed to be user-friendly and efficient, allowing users to easily customize lists based on specific criteria for precise targeting and engagement with their audience. The module also offers robust tools for effectively managing and importing subscription lists, ensuring the accuracy and currency of contact information to maximize the success of campaigns and achieve optimal audience segmentation.

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Campaigns Module Articles:
Email Bounces or Suppression List

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Campaigns Module - Email Bounces or Suppression List

This informative article delves into the Email Bounces or Suppression List feature integrated into the Glue Up Campaigns module. By utilizing this feature, organizations can effectively maintain email deliverability and enhance campaign performance. The module tracks and manages email bounces, automatically excluding undeliverable addresses from future campaigns, thereby safeguarding the sender's reputation.

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Campaigns Module Articles:
General Surveys (Add-On)

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Campaigns Module - General Surveys (Add-On)

This informative article explores the General Surveys (Add-On) feature within the Glue Up Campaigns module, providing organizations with a versatile tool for collecting valuable feedback and insights. With this feature, users can easily create and distribute surveys to their audience, capturing responses and analyzing the data directly within the platform. By leveraging the General Surveys (Add-On), organizations can gain actionable information, make informed decisions, and ultimately improve the effectiveness of their campaigns while enhancing audience engagement.

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Campaigns Module Articles:
How to Create a Campaign.

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Campaign Module - How to Create a Campaign

This informative article provides step-by-step guidance on creating campaigns within the Glue Up Campaigns module. It highlights the user-friendly process that enables organizations to efficiently plan and execute their marketing initiatives. Users can seamlessly create campaigns, define their target audience, craft engaging content, and schedule delivery, leveraging the module's intuitive interface and powerful features to drive audience engagement, monitor campaign performance, and successfully achieve their marketing goals.

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Campaigns Module Articles:
Creating a Campaign

Click Here

Campaign Module - Creating a Campaign

This article offers step-by-step guidance on creating impactful marketing campaigns using Glue Up's Campaign module. With its intuitive interface and flexible templates, organizations can easily design visually stunning emails and landing pages. By seamlessly incorporating features like registration forms, social media sharing, and analytics tracking, Glue Up streamlines the campaign creation process, leading to improved audience engagement and measurable outcomes.

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WHAT ARE THESE
EVENTS MODULE ARTICLES?

This series of articles offers practical guidance on utilizing the Glue Up Events Module, a powerful platform that simplifies event management and elevates attendee experiences. With its diverse set of features, organizations can effortlessly create, oversee, and market events of any scale. The module provides essential tools for event registration, ticketing, agenda organization, attendee engagement, and post-event analysis, empowering organizations to deliver flawless and impactful events that leave a lasting impression.

Events Module - CPD/CPE Bulk Approval Feature

This article explores the CPD/CPE Bulk Approval Feature in the Glue Up Events module, which simplifies the approval process for Continuing Professional Development (CPD) or Continuing Professional Education (CPE) credits. With this feature, organizations can conveniently review and approve multiple credit requests in bulk, saving valuable time and effort. By utilizing this functionality, organizations can efficiently manage CPD/CPE credits, ensure prompt approvals, and offer attendees valuable educational opportunities.

Events Module - Tracking Profit and Loss for an Individual Event

This article explores the Tracking Profit and Loss feature associated with the Glue Up Events module, offering organizations valuable financial visibility. By leveraging this feature, users can easily track and analyze the revenue and expenses of individual events, enabling better financial management and informed decision-making. With the ability to monitor profit and loss, organizations can optimize event planning, identify opportunities for cost reduction or revenue growth, and ensure the financial success of their events.

Events Module - Creating a New Event

This article provides a step-by-step guide on how to create a new event using the Glue Up Events module. Creating an event within this module is a user-friendly and streamlined process that allows organizations to plan and execute successful events with ease. Users can effortlessly define event details, customize registration options, and manage various aspects of the event, ensuring a seamless and memorable experience for attendees.

Events Module - Creating Event Blueprints and Templates

This article explores the benefits of using the Creating Event Blueprints and Templates feature in the Glue Up Events module. By utilizing this feature, users can easily design event blueprints and templates with pre-defined settings, including event structure, sessions, speakers, and registration options, streamlining the event planning process. This functionality enables organizations to save time, maintain consistency across events, and optimize efficiency in event management, resulting in outstanding event experiences for attendees.

Events Module - Choosing Event Templates

This series of articles offers technical guidance on utilizing the Choosing Event Templates feature in the Glue Up Events module. With this feature, users can easily select from a range of pre-designed event templates tailored to their specific requirements, including conferences, webinars, or networking events. By leveraging these templates, organizations can expedite event setup, maintain a professional appearance, and ensure consistency, ultimately delivering memorable and successful experiences to their attendees.

Events Module - Event Blueprints

This article offers technical guidance on utilizing Event Blueprints in the Glue Up Events module. Event Blueprints are a robust feature that simplifies event planning and organization by allowing users to create customizable templates. These templates define essential elements such as event structure, sessions, speakers, and registration options. By leveraging Event Blueprints, organizations can streamline the event creation process, ensure consistency across multiple events, and save time and effort by utilizing pre-defined settings, leading to seamless and successful event experiences.

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Events Module Articles

Events Module - Customizing Events System Emails

This article offers technical guidance on how to customize event system emails using the Glue Up Events module. With this feature, organizations can personalize and tailor system-generated emails like registration confirmations, reminders, and post-event feedback requests. Users have the freedom to incorporate their branding, messaging, and design elements, ensuring a consistent and engaging attendee experience. By leveraging this customization feature, organizations can effectively communicate event details, reinforce their brand identity, and boost attendee engagement and satisfaction levels.

Events Module - Events Module Guide

This module guide offers detailed technical instructions for utilizing the Glue Up Events module effectively. Designed to simplify event management and enhance attendee experiences, the module provides a comprehensive platform with a wide array of features. From event creation and promotion to attendee engagement and post-event analytics, organizations can leverage the tools and capabilities within the module to deliver seamless and successful events, fostering stronger connections with their audience and achieving their event objectives with efficiency.

WHAT ARE THESE
MEMBERSHIPS MODULE **ARTICLES?**

These articles offer valuable technical guidance for effectively utilizing the Glue Up Memberships Module. This module serves as a powerful solution, designed to optimize the management of membership programs by streamlining processes and boosting efficiency. It empowers organizations with user-friendly tools to effortlessly create, manage, and track memberships, ensuring a smooth experience for administrators and members. Notable features include automated renewals, personalized member profiles, and comprehensive reporting capabilities, all working together to simplify membership operations, promote stronger engagement, and improve member retention within the community.

Memberships Module - Setting Up your Member Directory

This article offers valuable technical guidance on how to set up your Member Directory within the Glue Up Membership module. Establishing and maintaining a comprehensive directory of members is essential for organizations, and this feature provides administrators with a user-friendly interface to configure and personalize the directory according to their specific requirements. By organizing member profiles effectively, the Member Directory enhances networking opportunities, simplifies member search and discovery, and cultivates a strong sense of community within the organization.

Memberships Module - Limiting the Number of Chapters per Member

This article offers technical guidance on how to effectively implement the feature of Limiting the Number of Chapters per Member within the Glue Up Membership module. This feature empowers organizations to set specific restrictions on the maximum number of chapters a member can join. Administrators gain the ability to define and enforce these limits, ensuring equitable distribution of member engagement across various chapters. By utilizing this functionality, organizations can foster a balanced level of participation, encourage broader member involvement, and enrich the overall chapter experience within the community.

Memberships Module - Creating and Customizing Fields for Member Application Forms

This article offers technical guidance on how to effectively create and customize fields for member application forms within the Glue Up Membership module. With this capability, organizations can design application forms that align with their specific needs and preferences. Administrators have the power to add, modify, and tailor fields to collect relevant information from prospective members, ensuring a smooth and personalized application experience. By utilizing this feature, organizations can efficiently gather and organize data, streamline the application process, and create accurate and comprehensive member profiles, leading to improved decision-making and enhanced member engagement.

Memberships Module - Importing Member Data in Bulk

This article offers technical guidance on how to effectively import member data in bulk using the Glue Up Membership module. This feature enables organizations to seamlessly transfer large volumes of member information into the system, simplifying the import process. Administrators can conveniently upload data in standardized formats like Excel files, resulting in time savings, enhanced data accuracy, and efficient onboarding and management of member records. By leveraging this feature, organizations can optimize their membership management operations, ensuring smooth data integration and improved overall efficiency.

Memberships Module - Disabling Platform Migration Email Notification

This article offers technical guidance on how to disable platform migration email notifications within the Glue Up Membership module. This feature empowers organizations to have control over the communication flow during migration processes by turning off email notifications specifically related to platform migration. Administrators can utilize this functionality to prevent unnecessary email updates from being sent to members, ensuring a seamless and uninterrupted transition without overwhelming them with migration-related notifications. By following this guidance, organizations can effectively manage their migration process while maintaining a streamlined and user-friendly experience for their members.

Memberships Module - Troubleshooting CRM and Membership Bulk Import

This article provides a comprehensive guide for troubleshooting the CRM and Membership bulk import process in Glue Up Memberships. To ensure a seamless import, follow these tips. Organize your data in Excel using the provided link or tutorials for top-10 data organization methods. Refer to the HelpDesk articles for clear guidelines on importing contacts or memberships. Pay attention to formatting requirements for phone numbers and email addresses, and use Excel filters to identify improper email formats. Understand the distinctions between default and custom fields, download answer keys, use formulas for value matching, and follow specific import guidelines. Remember to clear formats, remove empty columns, avoid importing '0', and eliminate formulas for a successful import.

Memberships Module - Configuring Membership Email Notifications

This article offers technical guidance on how to effectively configure membership email notifications using the Glue Up Membership module. With this feature, organizations can customize and personalize the content of email communications sent to their members. Administrators gain the ability to define and tailor various membership-related notifications, including renewal reminders and event invitations, based on their unique requirements. By leveraging this feature, organizations can enhance member engagement, improve communication efficiency, and ensure the timely delivery of relevant information, fostering a vibrant and active membership community.

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Membership Module **Articles**

Memberships Module - Membership System Email Templates (Explained)

This article offers technical guidance on utilizing Membership System Email Templates within the Glue Up Membership module. These templates are designed to simplify the process of creating and sending membership-related emails to organizations. Administrators can easily customize these pre-designed templates to craft professional and consistent messages for various purposes such as welcome messages, renewal notifications, or event updates. By leveraging these templates, organizations can save time, maintain a cohesive branding experience, and effectively communicate with their members, resulting in stronger member relationships and increased engagement.

Memberships Module - Customizing Membership System Emails

This article offers technical guidance on how to effectively customize membership system emails using the Glue Up Membership module. With this feature, organizations can personalize and adapt email communications sent to their members according to their unique preferences. Administrators have the flexibility to modify the content, layout, and branding of membership system emails, ensuring alignment with the organization's style and messaging. By leveraging this feature, organizations can enhance the member experience by delivering personalized and engaging emails, reinforcing their brand identity, and effectively communicating essential membership-related information.

Memberships Module - Glue Up Memberships Widget

This article offers technical guidance on how to effectively use the Glue Up Memberships Widget, a valuable tool integrated with the Glue Up Membership module. With this widget, organizations can effortlessly showcase membership-related information on their website or digital platforms. The widget provides a customizable interface that allows administrators to highlight membership options, benefits, and registration forms, creating a user-friendly experience for prospective members. By leveraging the Glue Up Memberships Widget, organizations can attract and engage potential members, streamline the membership sign-up process, and successfully promote their membership programs.

Memberships Module - Membership Import Process

This article offers technical guidance on the Membership Import Process associated with the Glue Up Membership module. With this process, organizations can effectively import and onboard new members into their membership database. It involves bulk importing of member data using standard file formats like Excel, simplifying the transfer of member information into the system. By leveraging this feature, organizations can streamline the onboarding process, ensure the accuracy and comprehensiveness of member records, and expedite the integration of new members into their membership programs.

Memberships Module - Configuring Membership Types

This article offers technical guidance on how to configure Membership Types using the Glue Up Membership module. Organizations can define and customize various membership categories or levels based on their specific needs. This feature provides administrators with the ability to create unique membership types that offer specific benefits, durations, pricing, and access privileges. By leveraging this functionality, organizations can easily adapt their membership offerings to cater to the diverse needs of their members, thereby enhancing member engagement and effectively managing their membership programs.

Memberships Module - General Information

This article offers technical guidance on managing the General Information section within the Glue Up Membership module. This section allows administrators to configure vital details and settings related to membership management, including the organization's name, logo, contact information, and membership program description. By providing these essential details, organizations can establish a professional and cohesive identity for their membership program, ensuring clear communication and consistent branding throughout the entire membership experience.

Memberships Module - Managing Membership Profiles (Individual or Corporate)

This article offers technical guidance on how to effectively manage membership profiles, whether they belong to individuals or corporate entities, using the Glue Up Membership module. Administrators have the ability to oversee and maintain comprehensive profiles for each member, including essential information such as contact details, membership status, preferences, and engagement history. By efficiently managing these profiles, organizations can personalize member experiences, track engagement, and leverage data-driven insights to strengthen member relationships and cultivate a vibrant membership community.

Memberships Module - Additional Recipients of Membership System Emails

This article offers technical guidance on how to include additional recipients in the distribution of membership system emails using the Glue Up Membership module. With this feature, organizations can designate specific individuals or groups to receive copies of important membership-related communications, such as renewal notifications or event invitations. By leveraging this functionality, administrators can ensure effective communication with stakeholders, facilitate coordination, and keep key individuals informed about essential membership-related activities and updates.

Membership Module **Articles**

Memberships Module - Processing Membership Applications

This article offers technical guidance on how to effectively process membership applications using the Glue Up Membership module. With this functionality, organizations can efficiently handle and evaluate incoming applications by allowing administrators to review and approve applications, verify applicant information, and make informed decisions regarding membership acceptance. By leveraging this feature, organizations can streamline the application process, ensure accurate and timely responses to applicants, and effectively manage the growth and development of their membership community.

Memberships Module - Membership Module Guide

This user guide offers step-by-step instructions on utilizing the Glue Up Memberships Module, a powerful solution that simplifies and enhances membership program management. With this module, organizations can easily create, manage, and track memberships, ensuring a smooth experience for administrators and members alike. By leveraging features such as automated renewals, personalized member profiles, and comprehensive reporting, the module optimizes membership operations, promotes higher engagement and retention rates, and empowers organizations to cultivate a thriving membership community.

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WHAT ARE THESE
FINANCE MODULE ARTICLES?

These informative articles offer detailed technical guidance on utilizing the Glue Up Finance Module effectively. The Finance module is a comprehensive solution that simplifies and automates financial processes for organizations. It empowers businesses with key features like expense tracking, invoicing, and financial reporting, all accessible within a centralized platform. With its intuitive interface and powerful functionalities, the Finance module optimizes financial operations, enhances transparency, and provides precise insights to facilitate informed decision-making.

Finance Module - CC List for Invoices

This article offers detailed technical guidance on customizing event system emails within the Glue Up Events module. One notable feature is the CC List for Invoices in the Glue Up Finance module, which empowers users to add extra recipients who should receive copies of invoice-related communications. This functionality facilitates seamless communication with relevant stakeholders, ensuring that they stay well-informed about invoice transactions and any updates. By leveraging the CC List, organizations can foster effective communication, enhance transparency, and promote collaboration throughout the invoicing process.

Finance Module - Tracking Profit & Loss for All Events

In this article, you'll find clear instructions on how to effectively track the financial performance of all events using the Tracking Profit & Loss feature in the Glue Up Finance module. This powerful tool simplifies the process of monitoring revenue, expenses, and overall profitability through a centralized dashboard. By gaining real-time insights, event organizers can make informed decisions, improve financial strategies, and ensure the success of their events.

Finance Module - Managing Payments

In this article, you'll find detailed instructions on how to effectively manage payments using the Managing Payments feature in the Glue Up Finance module. This feature provides a user-friendly solution for handling financial transactions and payments with ease. By utilizing this feature, users can effortlessly track incoming and generate invoices, and efficiently manage payment statuses from a centralized platform. This streamlined approach enhances financial transparency, simplifies payment processes, and ensures prompt and accurate financial transactions for event organizers.

Finance Module - Set Up your Finance Settings & Add Billing Information

In this article, you'll find step-by-step instructions on how to set up your finance settings and add billing information using the Glue Up Finance module. This powerful feature empowers users to customize their financial preferences by defining their desired currency, setting tax rates, and personalizing invoicing templates to meet their organization's specific needs. By securely adding billing information, users can streamline their invoicing process, maintain precise financial records, and effortlessly conduct seamless transactions within the Glue Up platform.

Finance Module - Finance Module Guide

This comprehensive manual serves as a practical guide for utilizing the Glue Up Finance module effectively. The module is specifically designed to streamline financial operations within the Glue Up platform, offering a wide array of features such as revenue and expense tracking, payment management, finance settings configuration, invoice generation, and meticulous financial record-keeping. With its user-friendly interface and powerful functionalities, the Glue Up Finance module equips organizations with the tools needed to efficiently manage their finances, optimize financial processes, and make informed decisions to foster sustainable growth.

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ACADEMY
Let Us Inspire You.

GLUE UP
PLATFORM MODULE
PLAYLISTS

WHAT'S IN THIS SECTION?

- A variety of different learning playlists created to organize different Glue Up Platform learning resources.

- Diverse range of content: courses, videos, documents, assessments.

- Carefully sequenced for effective learning pathways.

- Easy access and navigation for learners.

- Promotes a streamlined and engaging learning journey.

- Note: If you have an active subscription to Glue Up Academy, you can access these playlists from this manual.

ACADEMY
Let Us Inspire You.

Glue Up Platform Playlist

19 Playlists

A structured collection of courses and learning materials delivered through the Glue Up Academy. This consist of the following playlists:

- Platform Module Processes Playlist (6)
- Platform Module Settings Playlist (1)
- Platform Module Overview Playlist (6)
- Platform Module Articles Playlist (6)

Click on the listing to jump to the page

LET US
INSPIRE YOU

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Module **Overview** Playlist

WHAT IS AN

OVERVIEW PLAYLIST?

The Glue Up Academy's Platform Overview Playlist offers a wide variety of courses on the Glue Up Platform, covering functionalities like Contacts, Campaigns, and Events modules. It caters to both beginners and advanced users, providing valuable skills and insights to optimize operations and boost engagement. Users can easily access bite-sized courses of up to 5 minutes without any prerequisites, offering flexibility and convenience.

Contacts Module **Overview** Playlist

This playlist offers educational content for a better understanding of the Glue Up Contacts Module. It offers courses that will show you how to simplify contact management for businesses with features like categorization, tagging, and interaction tracking. There are also courses that will also show you how to improve communication, build relationships, and drive growth with this powerful module.

The following courses are available in this playlist:

- Contacts Module: Introduction to the Contacts Module
- Contacts Module: How to Import Contacts
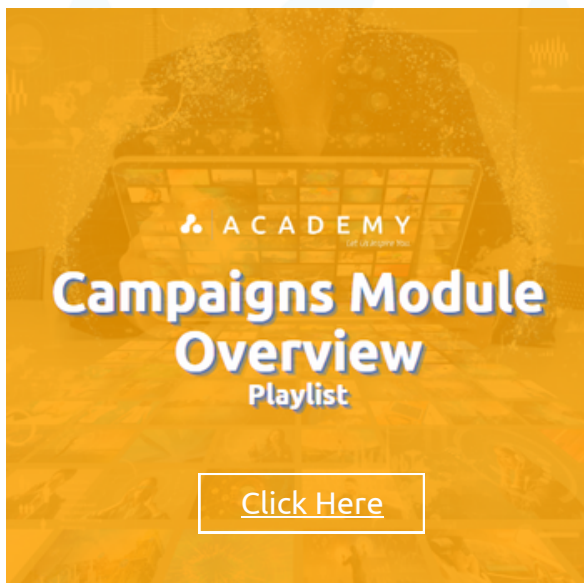- Contacts Module: How to Manage Contacts
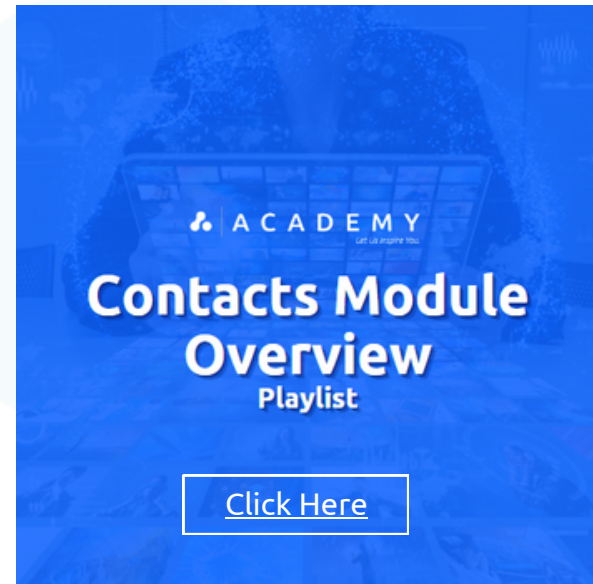
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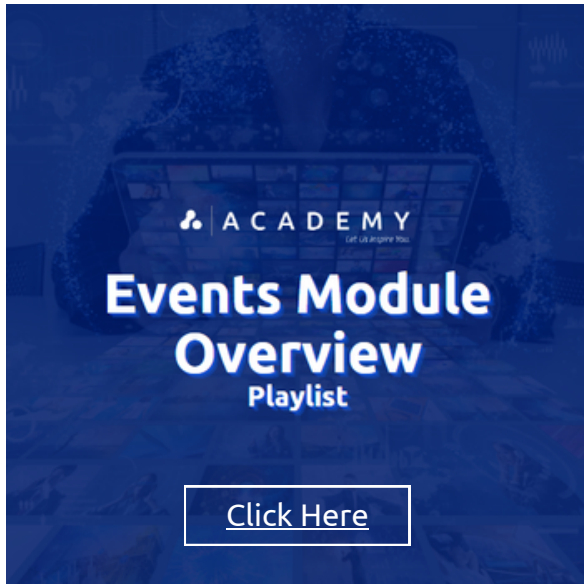
Campaigns Module **Overview** Playlist

This playlist offers educational content for a better understanding of the Glue Up Campaigns Module. It offers courses that will show you how to simplify campaign creation and management with versatile features and drag-and-drop editors. You can also learn how to manage recipient lists, track performance, and access detailed reports to enhance engagement, improve marketing outcomes, and effectively manage audiences.

The following courses are available in this playlist

- Campaigns Module: Introduction to the Campaigns Module
- Campaigns Module: How to Create Campaigns
- Campaigns Module: How to Access Campaign Reports
- Campaigns Module: Suppression Lists

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Module **Overview** Playlist

Events Module **Overview** Playlist

This playlist offers educational content for a basic understanding of the Glue Up Events Module. It offers courses that will show you how to simplify event management with effortless setup, publishing, and customization of event details. There are also courses that will show you how to improve event organization, execution, and attendee experiences with this powerful module.

The following courses are available in this playlist:

- Events Module - Introduction to the Events Module Overview
- Events Module - 01: How to Create an Event - Set Up
- Events Module - 02: How to Create an Event - Publish
- Events Module - 04: How to Create an Event - Manage

Events Module Overview Playlist

[Click Here]

Membership Module **Overview** Playlist

This playlist offers educational content for a basic understanding of the Glue Up Membership Module. It offers courses that will show you how to simplify membership management with a centralized hub and an intuitive workflow manager. There are also courses that will show you how to access, update, track member information, and generate insightful reports to effortlessly manage memberships, enhance member experiences, and drive growth.

The following courses are available in this playlist:

- Memberships Module: Introduction to the Membership Module
- Memberships Module: General Information
- Memberships Module: Workflow Manager
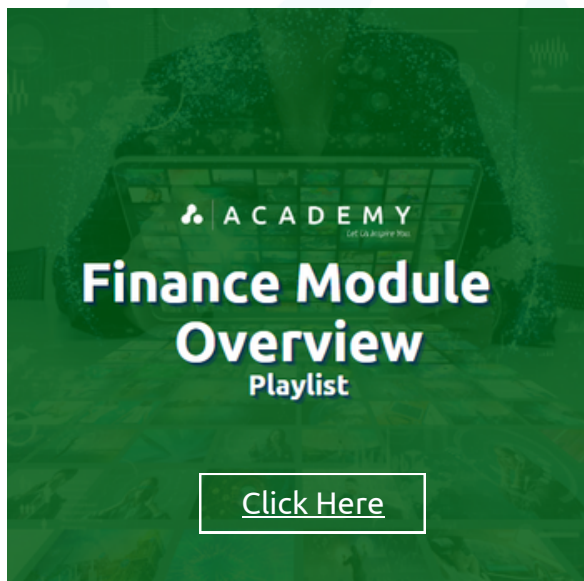- Memberships Module: Members/Memberships

Memberships Module Overview Playlist

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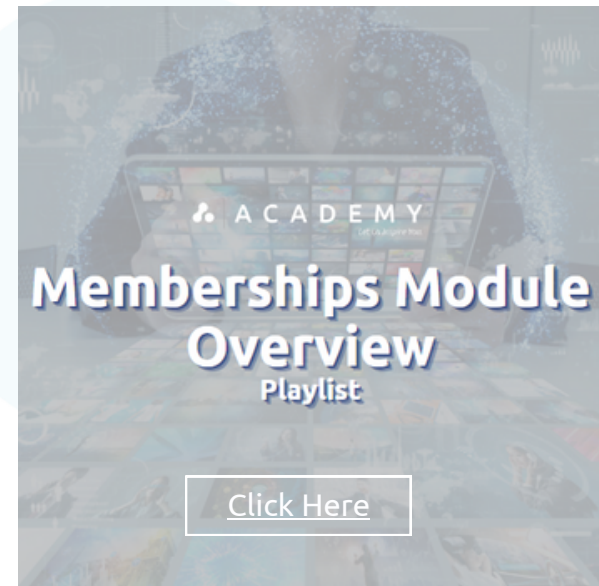
Finance Module **Overview** Playlist

The playlist offers educational content for a basic understanding of the Glue Up Finance Module. It offers courses that will show you how to streamline financial operations with a versatile tool and comprehensive financial management system. There are also courses that will show you how to customize finance settings, configure billing information, and effectively manage finances with secure storage, efficient billing processes, and financial transparency.

The following courses are available in this playlist:

- Finance Module: Introduction to the Membership Module
- Finance Module: Set Up your Finance Settings & Add Billing Information

Finance Module Overview Playlist

[Click Here]

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Glue Up Platform Module Settings Playlist

Glue Up
Platform Settings
PLAYLIST

Click Here

WHAT IS A
PLATFORM SETTINGS PLAYLIST?

A comprehensive collection of courses that focus on configuring the settings associated with key modules of the Glue Up platform: Contacts, Campaigns, Events, Memberships, and Finance. This concise playlist equips participants with the knowledge and skills to effectively configure these modules, enabling them to streamline operations, enhance engagement, and achieve better financial management through the Glue Up platform.

The following courses below are found under this playlist:

Contact Module - Introduction to the Contacts Module Settings

The "Contacts Module Settings" course provides an introduction to the Glue Up platform's Contacts module. Participants will learn how to effectively collect and manage contact information for individuals and companies within their database. The course covers various topics, including viewing contact information on the Dashboard, creating lists and smart lists, managing business opportunities, and ensuring the synchronization of contact information. By completing this course, participants will gain a comprehensive understanding of the Contacts module settings and be equipped to efficiently manage their contact database.

Campaigns Module - Introduction to the Campaigns Module Settings

The "Campaigns Module Settings" course provides an overview of the Glue Up platform's Campaigns module, which enables users to create, send, and track customized emails to contact and subscription lists. Participants will learn how to leverage campaign analytics to gain insights into individual email campaign performance, ensuring effective engagement with their community. The course also covers settings related to DNS & Verified Senders for personalized sender emails, creating campaign and survey templates for future use, and managing subscriptions and committees lists, including the suppression list for bounced and unsubscribed recipients.

Events Module - Introduction to the Events Module Settings

The "Events Module Settings" course provides a comprehensive overview of the Glue Up platform's Events module, empowering users to efficiently plan, promote, and execute online or offline events of any scale. Participants will learn how to create branded event pages, set up ticketing options, offer special pricing and coupons, and customize registration forms to collect necessary information. The course also covers event management tasks such as content editing, event promotion through invitations and campaigns, attendee management, onsite toolkit utilization, finance management, and conducting follow-up surveys for enhanced engagement.

Memberships Module - Introduction to the Memberships Module Settings

The "Memberships Module Settings" course focuses on the Glue Up platform's Memberships module, which enables the creation, application processing, payment management, and renewal tracking for different types of memberships. Participants will learn how to configure settings related to general membership information, system email templates, application forms, membership types, membership directory display, and import history and activation. Additionally, emphasis is placed on ensuring team members have appropriate roles and permissions to access and manage membership information effectively.

Finance Module - Introduction to the Finance Module Settings

The "Finance Module Settings" course focuses on the Glue Up platform's Finance module, where information related to invoices, payments, and receipts is collected and stored. Participants will learn how to configure settings for organization and account billing information, tax settings, invoice and receipt configurations, and customizations. The course also highlights the ability to track profit and loss for hosted events and integration capabilities with payment gateways and accounting software for streamlined financial processes within the Finance module.

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Module **Processes** Playlist

WHAT IS A
MODULE PROCESSES PLAYLIST?

The Glue Up Academy Playlist is a carefully curated selection of concise Glue Up Platform Module courses covering essential processes in Contacts, Memberships, Events, Campaigns, and Finance modules. No prerequisite order is required, providing learners with flexibility in their learning journey. All courses are designed to be completed within 5 minutes or less, ensuring efficiency and focused learning.

Contacts Module **Processes** Playlist

Master the art of managing your contacts with this comprehensive playlist. Explore the Glue Up Contacts module processes from start to finish, including setting up module settings, creating contact and smart lists, importing companies and contacts, navigating the module, understanding the contacts dashboard, merging contacts, and leveraging opportunities. Enhance your skills and streamline your contact management workflow with this essential playlist.

The following articles are available in this playlist:

- Contacts Module - How to Create a Contact List
- Contacts Module - How to Create a Smart List
- Contacts Module - Importing Companies
- Contacts Module - Importing Contacts
- Contacts Module - Navigating through the Contacts Module
- Contacts Module - Understanding the Contacts Dashboard
- Contacts Module - Introduction to the Contacts Module
- Contacts Module - Merging Contacts
- Contacts Module - Opportunities

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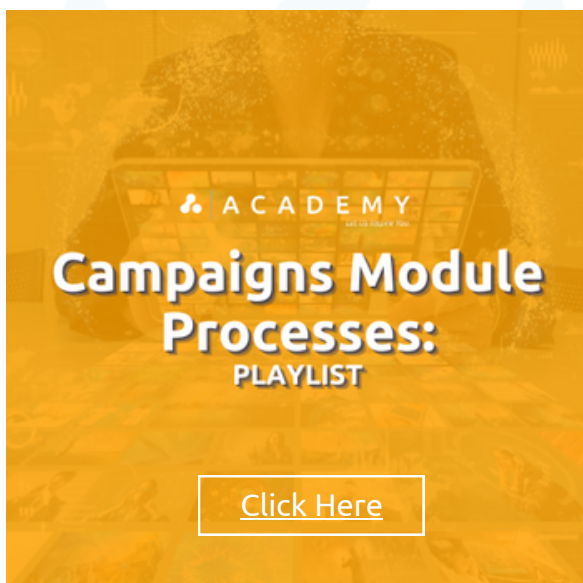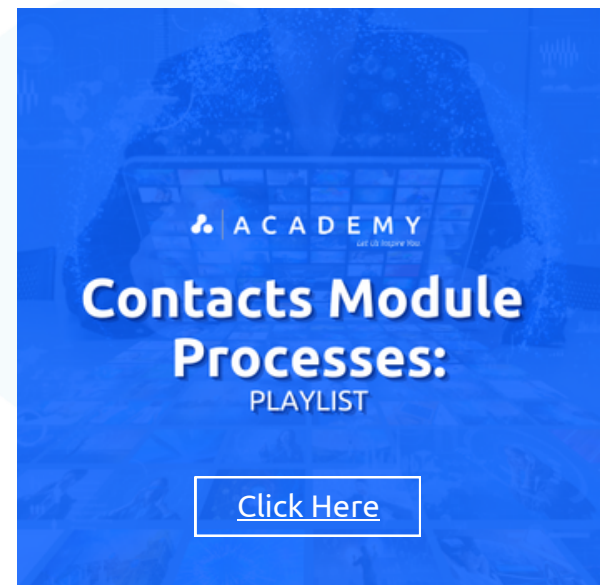
Campaigns Module **Processes** Playlist

In this concise series of courses, each lasting between 5 to 10 minutes, you will gain a comprehensive understanding of the processes involved in utilizing Glue Up's Campaigns Module. This module is a highly effective tool that optimizes and elevates your organization's marketing and communication endeavors. By utilizing a single centralized platform, you can effortlessly create, manage, and monitor targeted campaigns across multiple channels such as email, social media, and SMS. The Campaigns module's user-friendly interface and extensive features enable you to engage your audience, increase conversions, and accurately evaluate the effectiveness of your marketing strategies.

The following courses are available in this playlist:

- Campaigns: How to access campaign reports
- Campaigns: How to create campaigns
- Campaigns: How to create surveys
- Campaigns: Subscription Lists
- Campaigns: Suppression Lists

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Module **Processes** Playlist
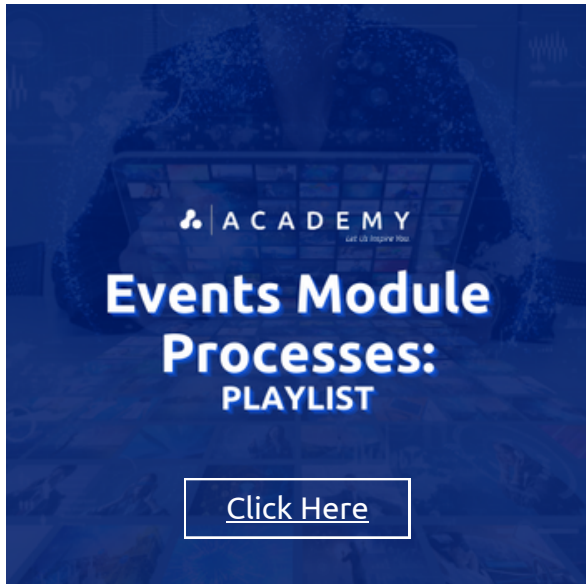
Events Module **Processes** Playlist

Elevate your event planning and execution with this comprehensive playlist exploring the Glue Up Events module. Unleash the full potential of event management as you dive into configuring settings, forms, rooms, tickets, venues, sponsors, and more. Learn the step-by-step process of creating, promoting, and managing events while discovering useful templates, tags, and email designs.

The following articles are available in this playlist:

- Events: 00 Introduction Blueprints
- Events: 01 General Settings Blueprints
- Events: 02 Payment Options Blueprints
- Events: 03 Registration Form Blueprints
- Events: 04 Event Room Blueprints
- Events: 05 Tickets & Coupons Blueprints
- Events: 06 Venue Blueprints
- Events: 07 Sponsors & Partners Blueprints
- Events: 08 Layout & Design Blueprints
- Events: 09 Badges Blueprints
- Events: 00 Introduction How to Create an Event
- Events: 01 Set Up How to Create an Event
- Events: 02 Publish How to Create an Event
- Events: 03 Promote How to Create an Event
- Events: 04 Manage How to Create an Event
- Events: 05 Follow Up How to Create an Event
- Events: Design Templates
- Events: Event & Session Tags
- Events: System Email Templates
- Events: Venues & Badges

Memberships Module **Processes** Playlist

Enhance your membership management skills with this concise playlist delving into the Glue Up Memberships module. Unlock the module's full potential as you explore crucial processes like import history, member management, membership applications, and directory optimization. Discover the power of membership types, system email templates, and the Workflow Manager to streamline your workflow and maximize efficiency.

The following courses are available in this playlist:

- Memberships: General Information
- Memberships: Import History and Activation
- Memberships: Members/Memberships
- Memberships: Membership Applications
- Memberships: Membership Directory
- Memberships: Membership Types
- Memberships: System Email Templates
- Memberships: Workflow Manager
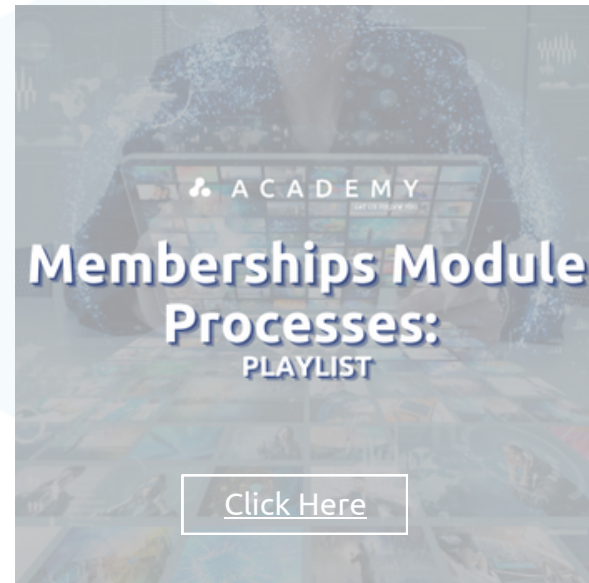
Finance Module **Processes** Playlist

Take control of your financial management with this focused playlist on the Glue Up Finance module. Dive into key processes such as analyzing events' profit and loss, managing invoices, and handling payments. Gain valuable insights and streamline your financial operations with this essential playlist.

The following articles are available in this playlist:

- Finance Module - Events Profit & Loss
- Finance Module - Invoices
- Finance Module – Payments

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Module Article Playlist

WHAT IS AN ARTICLE PLAYLIST?

The Glue Up Academy Module Article Playlist is a curated collection of Glue Up module articles that facilitates efficient learning and mastery. It allows users to easily navigate and access the articles in a logical order within the Glue Up Academy (LMS). Users can independently access the articles without prerequisites, enabling effective acquisition of knowledge and skills related to Glue Up functionalities.

Contacts Module Articles Playlist

The Glue Up Contact Module Playlist offers a curated collection of articles on effective contact management. Topics covered include merging contacts, importing/exporting contacts, field settings, tracking imports, creating lists, managing opportunities, and segmentation. By following this playlist, users can master the Contact module and optimize contact management strategies on the Glue Up platform.

The following articles are available in this playlist:

- Contacts - Contacts Module Guide
- Contacts - Merging Contacts and Companies
- Contacts - Import and Export Contacts
- Contacts - Contacts Module Field Settings
- Contacts - Tracking Imports for CRM Contacts
- Contacts - Contacts Module Contact & Smart Lists
- Contacts – Opportunities
- Contacts - Opportunity Types and Stages
- Memberships - Bulk Add Contacts to Corporate Memberships
- Contacts - Segment your CRM with Contact Lists and Smart Lists

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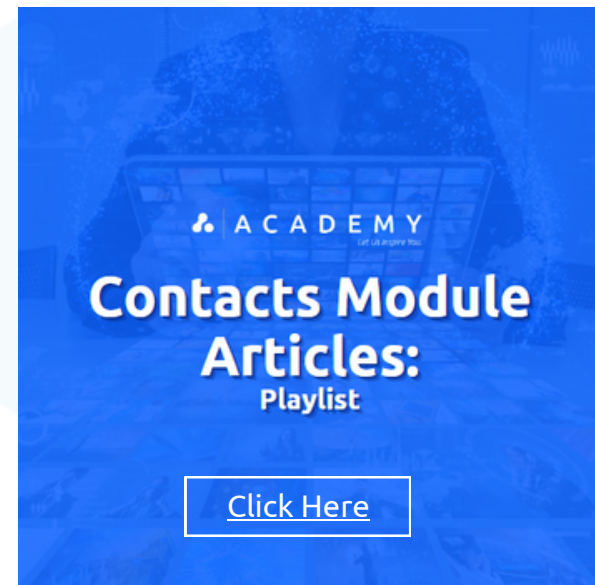
Campaigns Module Articles Playlist

The Glue Up Campaigns Module Playlist offers articles covering diverse aspects of campaign management. Gain insights on creating campaigns, generating reports, managing subscriptions, and utilizing surveys. Learn techniques for handling email bounces, suppression lists, and the benefits of using a dedicated IP address for email marketing. This playlist empowers users to leverage the Campaigns module effectively and achieve successful marketing outcomes.

The following articles are available in this playlist:

- Campaigns - How to Create a Campaign.
- Campaigns - Campaign Report
- Campaigns - Creating a Campaign
- Campaigns - General Surveys (Add-On)
- Campaigns - Email Bounces or Suppression List
- Campaigns - Creating, Managing and Importing Subscription Lists
- Campaigns - Advantages of Using a Dedicated IP Address for Email Marketing

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Module Article Playlist

Events Module
Articles:
Playlist

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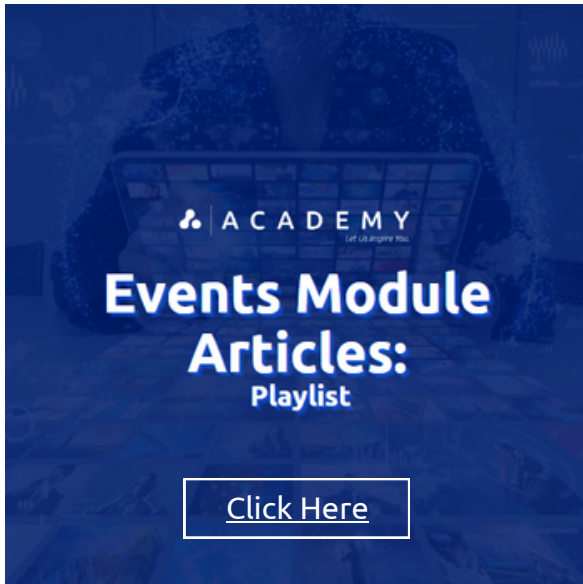
Events Module
Articles Playlist

The Glue Up Events Module Playlist offers concise articles on event management. Explore module guides, customize system emails, and utilize event blueprints and templates. Learn to choose templates, create events, manage CPD/CPE bulk approval, and track profit and loss. This playlist equips users to optimize event planning and execution with the Events module in Glue Up.

The following articles are available in this playlist:

- Events - Events Module Guide
- Events - Customizing Events System Emails
- Events - Event Blueprints
- Events - Choosing Event Templates
- Events - Creating a New Event
- Events - Creating Event Blueprints and Templates
- Events - CPD/CPE Bulk Approval Feature
- Events - Tracking Profit and Loss for an Individual Event

Memberships Module
Articles Playlist

The Glue Up Membership Module Playlist provides concise articles on membership management. Learn to configure membership types, process applications, and customize email notifications. Explore features like bulk adding contacts, managing profiles, and importing memberships. This playlist offers essential information to optimize membership management with the Glue Up Membership module.

The following articles are available in this playlist:

- Memberships - Configuring Membership Types
- Memberships - Membership Module Guide
- Memberships - Processing Membership Applications
- Memberships - Configuring Membership Email Notifications
- Memberships - Customizing Membership System Emails
- Memberships - Additional Recipients of Membership System Emails
- Memberships - Bulk Add Contacts to Corporate Memberships
- Memberships - Managing Membership Profiles (Individual or Corporate)
- Memberships - General Information

- Memberships - Configuring Membership Types
- Memberships - Membership Import Process
- Memberships - Glue Up Memberships Widget
- Memberships - Membership System Email Templates (Explained)
- Memberships - Troubleshooting CRM and Membership Bulk Import
- Memberships – Member/Membership
- Memberships – Disabling Platform Migration Email Notification
- Memberships - Importing Member Data in Bulk
- Memberships - Creating and Customizing Fields for Member Application
- Memberships - Limiting the Number of Chapters per Member
- Memberships - Setting Up Your Member Directory

Memberships Module
Articles:
Playlist

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Finance Module
Articles:
Playlist

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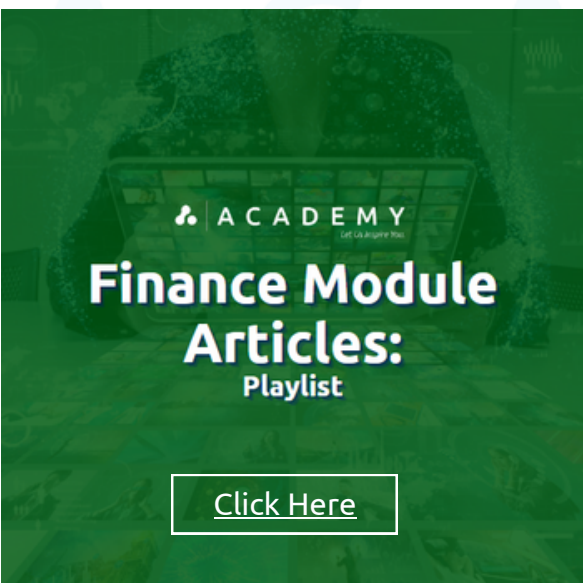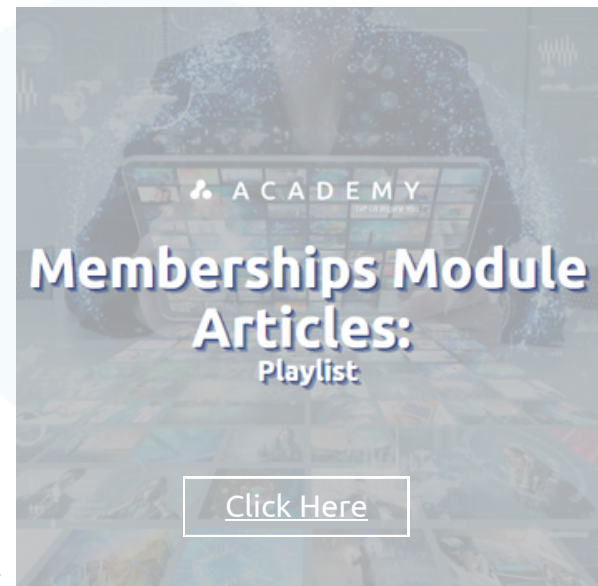
Finance Module
Articles Playlist

The Glue Up Finance Module Playlist is a comprehensive guide to mastering the Finance module of Glue Up. Start with the Finance Module Guide for an overview of features. Learn to set up finance settings, add billing information, and manage payments for seamless financial management. Track profit and loss for events and effectively manage invoicing communication with the CC List for Invoices article. Become a pro at leveraging Glue Up's finance module with this playlist.

The following articles are available in this playlist:

- Finance - Set Up your Finance Settings & Add Billing Information
- Finance - Managing Payments
- Finance - Tracking Profit & Loss for All Events
- Finance - CC List for Invoices
- Finance - Finance Module Guide

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GLUE UP PLATFORM MODULE CERTIFICATION PROGRAMS

WHAT'S IN THIS SECTION?

- A collection of learning curriculums that will allow the users to earn a certification in a specific Glue Up Platform module.

- A curriculum is a comprehensive and structured learning path for individuals or teams which offers;

  - A series of courses, assessments, and resources combined.

  - Strategic organization to develop specific skills or knowledge areas.

  - Systematic progression through materials for learners.

  - Ensures a well-rounded and targeted learning experience.

- Note: If you have an active subscription to Glue Up Academy, you can access these programs from this manual.

LET US INSPIRE YOU

Advance Platform Certification Program

For Glue Up Adminstrators
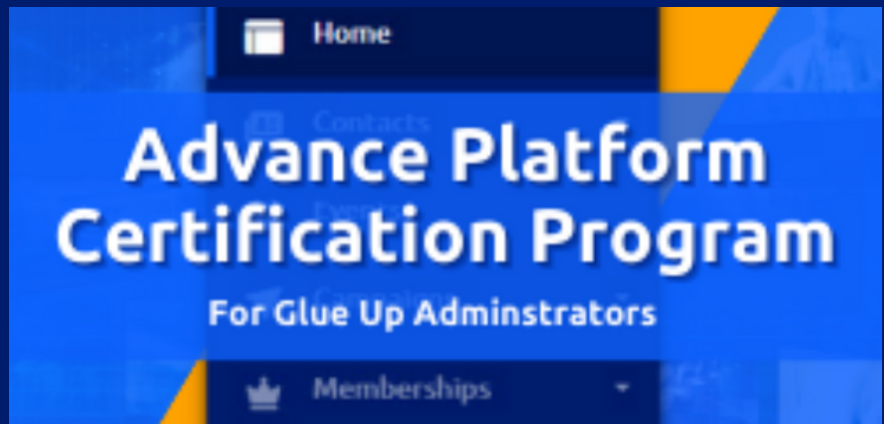
10+ Curriculums

A structured collection of courses and learning materials delivered through the Glue Up Academy. These curriculums are associated with the following training programs:

- Basic Platform Overview Curriculum (BPO) (6)
- Advanced Platform Certification Program Curriculums (Online) (5)

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Advance Certification Program Curriculum
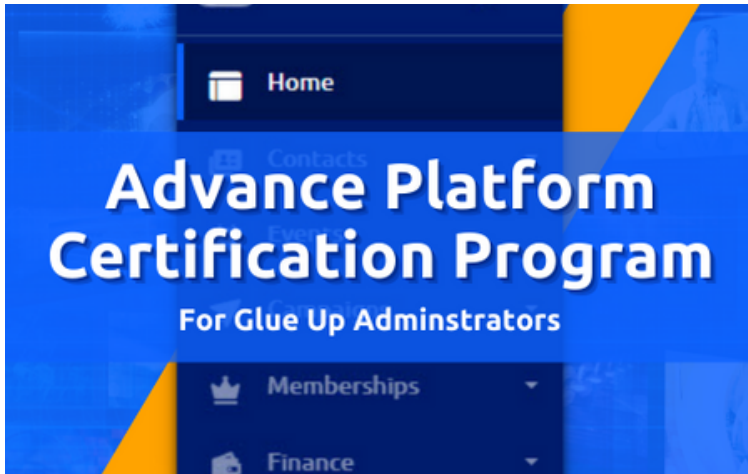
WHAT IS AN
ADVANCE CERTIFICATION PROGRAM
CURRICULUM?

The Glue Up Advanced Certification Program Curriculum provides advanced training on the Glue Up Platform modules through a series of structured learning curriculums. Designed for Glue Up administrators and regular users of these modules, these programs offer individual advanced certifications in Contacts, Campaigns, Events, Memberships, and Finance. Users can now earn certifications in one or all of these modules with the added convenience of online and virtual learning options.

Advance Contacts Module Certification Program Curriculum

The Glue Up Contacts Advanced Certification Program Curriculum offers advanced training on the Glue Up Contacts module via a comprehensive series of structured learning videos and demonstrations. Specifically designed for Glue Up administrators and regular module users, this program is an essential component for obtaining advanced certifications in the Contacts module. By successfully completing this curriculum in conjunction with the virtual live contacts certification session, users can achieve the coveted full certification.

This curriculum consists of the following modules that cover the following processes in the Contacts module:

100-Level Courses:
- GU100 Introduction to the Glue Up Application
- GU101 Introduction to the Contract Module Settings

200-Level Courses
- GU204-01 General Information
- GU204-02 Membership Application Forms
- GU204-03 Membership Types
- GU204-04 Membership System Email Templates
- GU204-05 Import History & Activation
- GU204-06 Membership Directory
- GU204-07 Workflow Manager
- GU204-08 Members Memberships

Click Here

Advance Campaigns Module Certification Program Curriculum

The Glue Up Campaigns Advanced Certification Program Curriculum offers comprehensive advanced training on the Glue Up Campaigns module, encompassing a series of structured learning videos and demonstrations. Tailored for Glue Up administrators and regular module users, this program serves as an integral requirement for obtaining advanced certifications in the Campaigns module. By successfully completing this curriculum, along with participating in the virtual live Campaigns certification session, users can attain the prestigious full certification.

This curriculum consists of the following modules that cover the following processes in the Campaigns module:

100 Level course:
- GU100 Introduction to the Glue Up Application
- GU105 Introduction to the Finance Module Settings

200 Level courses
- Module 1: GU205-01 Invoices
- Module 2: GU205-02 Payments
- Module 3: GU205-03 Events Profit & Loss

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Advance Certification Program Curriculum

Advance **Events** Module
Certification Program Curriculum

The Glue Up Events Advanced Certification Program Curriculum offers comprehensive advanced training on the Glue Up Events module, featuring a series of structured learning videos and demonstrations. Specifically tailored for Glue Up administrators and regular users of the module, this program is an essential component of the prerequisites for achieving advanced certifications in the Events module. By successfully completing this curriculum in addition to participating in the virtual live Events certification session, users can attain the esteemed full certification.

This curriculum consists of the following modules that cover the following processes in the Events module:

100-Level Courses:
- GU100 Introduction to the Glue Up Application
- GU103 Introduction to the Event Module Settings

200 Level Courses
- GU202-01 Module 1: Blueprints
- GU202-02 Module 2: How to Create an Event
- GU202-03 Module 3: Design Templates
- GU202-04 Module 4: Events & Sessions Tags
- GU202-05 Module 5: Events System Email Templates
- GU202-06 Module 6: Venues & Badge Design

Advance **Memberships** Module
Certification Program Curriculum

The Glue Up Memberships Advanced Certification Program Curriculum offers comprehensive advanced training on the Glue Up Memberships module, utilizing a series of structured learning videos and demonstrations. Created for Glue Up administrators and regular module users, this program forms a crucial part of the prerequisites for earning advanced certifications in the Memberships module. By successfully completing this curriculum and participating in the virtual live Memberships certification session, users can attain the prestigious full certification.

This curriculum consists of the following modules that cover the following processes in the Membership module:

100-Level course:
- GU100 Introduction to the Glue Up Application
- GU104 Introduction to the Membership Module Settings

200-Level courses
- GU204-01 General Information
- GU204-02 Membership Application Forms
- GU204-03 Membership Types
- GU204-04 Membership System Email Templates
- GU204-05 Import History & Activation
- GU204-06 Membership Directory
- GU204-07 Workflow Manager
- GU204-08 Members Memberships
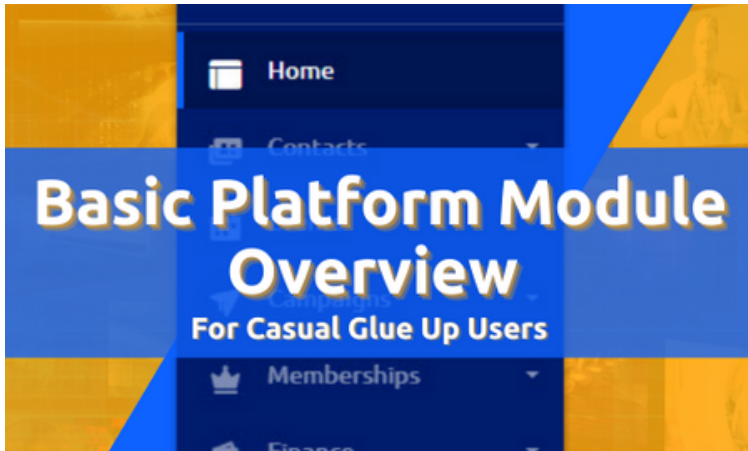

Advance **Finance** Module
Certification Program Curriculum

The Glue Up Finance Advanced Certification Program Curriculum delivers comprehensive advanced training on the Glue Up Finance module, utilizing a series of structured learning videos and demonstrations. Tailored specifically for Glue Up administrators and regular module users, this program forms an essential component of the prerequisites for earning advanced certifications in the Finance module. By successfully completing this curriculum in conjunction with the virtual live Finance certification session, users can obtain the prestigious full certification.

This curriculum consists of the following modules that cover the following processes in the Finance module:

100-Level course:
- GU100 Introduction to the Glue Up Application
- GU105 Introduction to the Finance Module Settings

200-Level courses
- Module 1: GU205-01 Invoices
- Module 2: GU205-02 Payments
- Module 3: GU205-03 Events Profit & Loss

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Platform Module Overview Curriculum

WHAT IS A
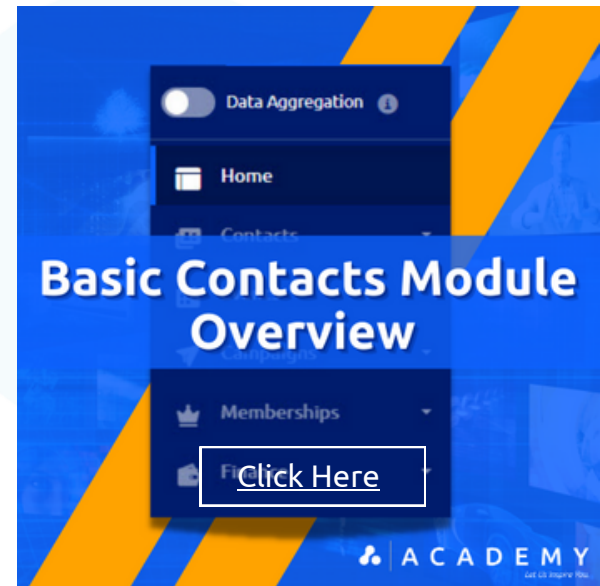## MODULE OVERVIEW CURRICULUM?

The Glue Up Academy's Basic Platform Overview Curriculum offers a variety of courses on the Glue Up Platform, covering fundamental processes in Contacts, Memberships, Finance, Campaigns, and Events. Designed for all skill levels, it provides valuable skills to improve efficiency and engagement. The curriculum consists of short, accessible courses lasting up to 5 minutes, following a sequential order for a strong foundation. It is tailored for casual platform users seeking a basic understanding of each module.

Basic Contacts Module Overview Curriculum

The Glue Up Contacts Module Overview curriculum provides concise and practical training on utilizing the Contacts module within the Glue Up platform. Participants will gain a comprehensive understanding of the module's features and functionalities through three focused courses. They will learn how to navigate the module, import contacts seamlessly, and effectively manage contact databases for improved event management and membership operations.

The following courses are available in this curriculum:

- Introduction to the Contacts Module Overview
- Contacts: How to Import Contacts
- Contacts: How to Manage Contacts

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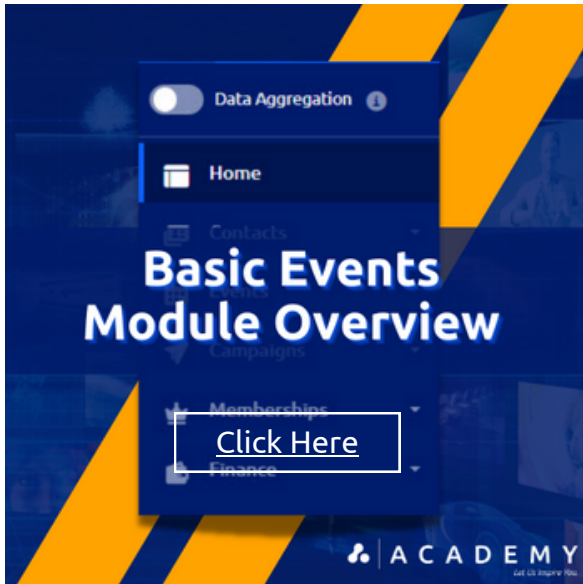
Basic Campaigns Module Overview Curriculum

The Glue Up Campaigns Module curriculum offers a concise overview and practical training on leveraging the Campaigns module within the Glue Up platform. Participants will be introduced to the module's key features and functionalities through four focused courses. They will learn how to navigate the module, create effective campaigns, access and analyze campaign reports, and utilize suppression lists for targeted and efficient communication strategies.

The following courses are available in this curriculum:

- Introduction to the Campaigns Module Overview
- Campaigns: How to Create Campaigns
- Campaigns: How to Access Campaign Reports
- Campaigns: Suppression Lists

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Platform Module Overview Curriculum

Basic **Events Module Overview** Curriculum

The Glue Up Events Module curriculum provides a concise overview and practical training on utilizing the Events module within the Glue Up platform. Participants will be introduced to the module's features and functionalities through three focused courses. They will learn how to navigate the module, set up and publish events, and effectively manage event-related tasks for seamless event planning and execution.

The following courses are available in this curriculum:

- Introduction to the Events Module Overview
- Events: Set Up How to Create an Event
- Events: Publish How to Create an Event
- Events: Manage How to Create an Even

Basic **Memberships Module Overview** Curriculum

The Glue Up Memberships Module curriculum offers a concise overview and practical training on utilizing the Membership module within the Glue Up platform. Participants will be introduced to the module's features and functionalities through four focused courses. They will learn how to navigate the module, gather general information about memberships, utilize the Workflow Manager for streamlined processes, and manage members and memberships effectively for enhanced membership management and engagement.

The following courses are available in this curriculum:

- Introduction to the Events Module Overview
- Events: Set Up How to Create an Event
- Events: Publish How to Create an Event
- Events: Manage How to Create an Even

Basic **Finance Module Overview** Curriculum

The Glue Up Finance Module curriculum provides a concise overview and practical training on utilizing the Finance module within the Glue Up platform. Participants will be introduced to the module's features and functionalities through two focused courses. They will learn how to navigate the module, set up finance settings, and add billing information for seamless financial management and streamlined billing processes.

The following courses are available in this curriculum:

- Introduction to the Finance Module Overview
- Finance: Set Up your Finance Settings & Add Billing Information

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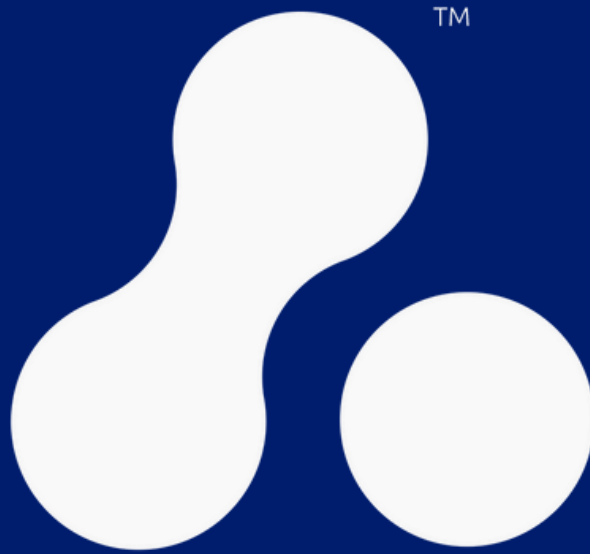
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Customer's Course Catalog

The Official Course Catalog | July, 2023 | Vol. 1

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