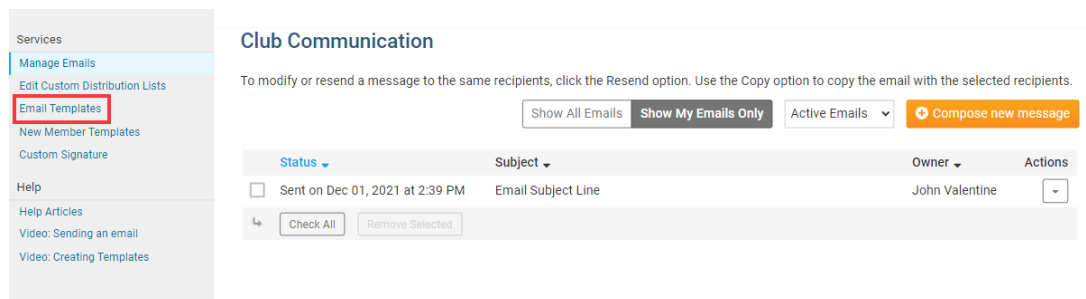


How do I create and edit email templates?

Michael C. - 2021-12-08 - Communication

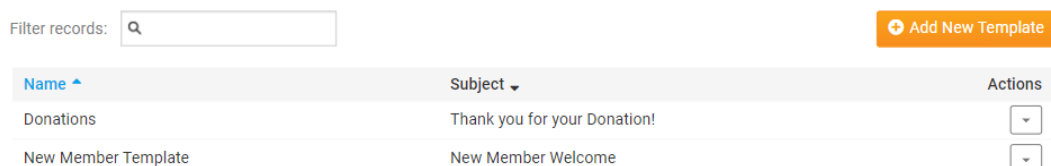
When you're writing standardized club emails, you may find it useful to create an **Email Template**. An email template is a standard email format that can be saved in ClubRunner, and used whenever its needed. For example, you might wish to create a standard template for a new member welcome email, or to remind members of overdue invoices.

1. To access the **Email Template** feature, you must go to your club homepage and log in. Then, click on **Member Area** on the top right, under your club banner.
2. Along the top of the screen you will see several tabs. Click on the **Communication** tab.
3. Now, click on **Email Services**.
4. You are now on the **Club Communication** screen. At the left side of the screen, you will see the **Email Services** menu, which is highlighted below. Click on the **Email Templates** feature in the **Email Services** menu.



5. On this screen, you can view your existing templates, and create a new template.

Email Templates



6. You have a number of management options when handling an existing template.

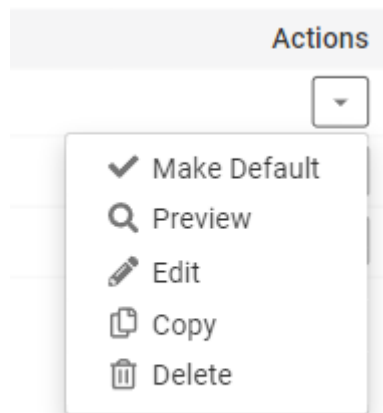
Make default: Select this to make the template the default when composing a new email.

Edit: This features opens the template in an editing window, for updates and other

changes.

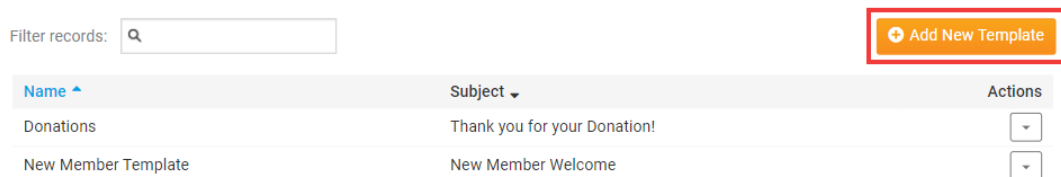
Preview: This feature displays the template as it will appear in email.

Delete: This deletes the template. A prompt will appear, asking if you are sure you want to delete the template.



7. To create a completely new template, click the **Add New Template** button.

Email Templates

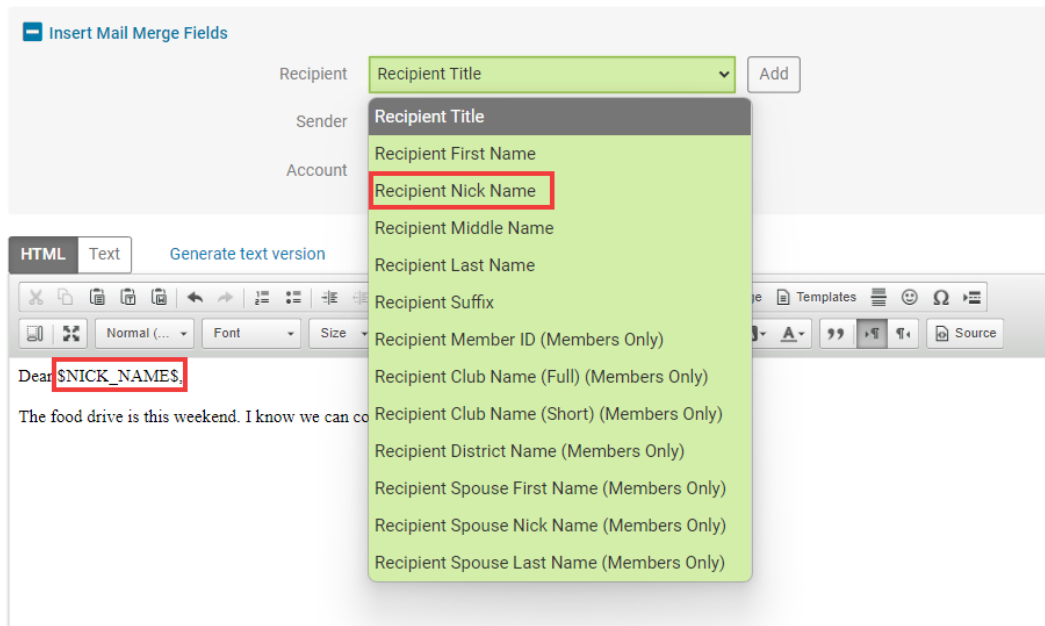


8. You are now on the **Add Message Template** window. You can enter a **Name** and **Subject** for your template. The name field is the template's file name used for internal purposes, while the subject field will appear as the subject line of the resulting email.

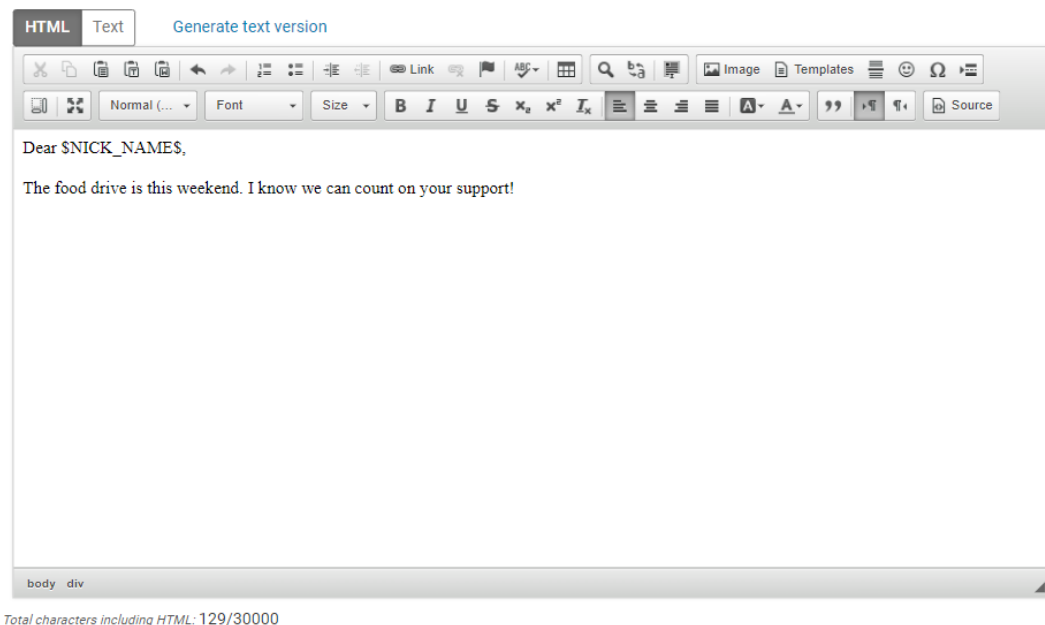
Add Message Template

A screenshot of the "Add Message Template" form. The form has two main sections. The top section, highlighted with a red border, contains two input fields: "Name" (with the value "Food Drive Appeal" and a red asterisk) and "Subject" (with the value "Rotary Club of Green Town needs your help!"). Below these is a "Message Template Code" input field. The bottom section, titled "Insert Mail Merge Fields", contains three rows of input fields: "Recipient" (with a dropdown menu showing "Recipient Title" and an "Add" button), "Sender" (with a dropdown menu showing "Sender First Name" and an "Add" button), and "Account" (with a dropdown menu showing "Account Full Name" and an "Add" button").

9. You may now enter the body of your message in the composition field. You can use the buttons above the composition window to format the text style, insert images, and more.



12. When you are happy with your template, click **Save** at the bottom right of the screen. If you wish to scrap the template, click **Cancel**.








Cancel Save

13. The new Email Template will now appear in the **Email Templates** window.

Email Templates

Filter records:

[+ Add New Template](#)

| Name  | Subject  | Actions |
|--|---|---|
| Donations | Thank you for your Donation! |  |
| Food Drive Appeal | Rotary Club of Green Town needs your help! |  |
| New Member Template | New Member Welcome |  |

Related Content

- [VIDEO: How do I create an email template?](#)
- [VIDEO: How do I send an email?](#)