

ClubRunner

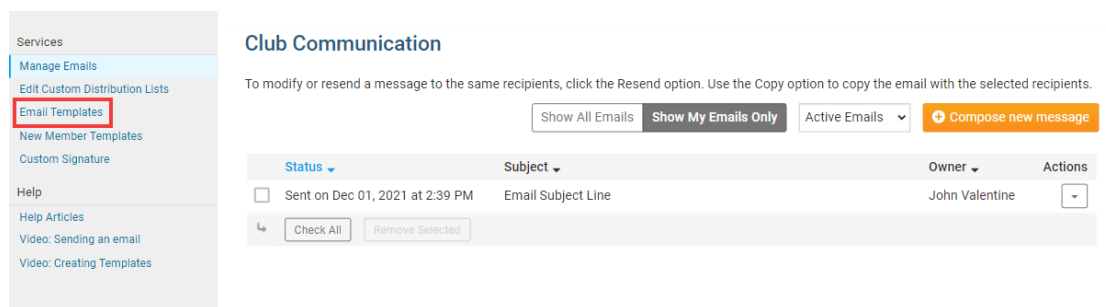
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How do I create and edit email templates?

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.

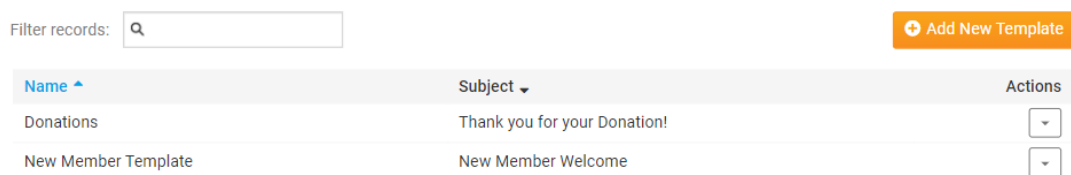
1. To access the **Email Template** feature, you must go to your club homepage and log in. Then, click on **Member Area** on the top right, under your club banner.
2. Along the top of the screen you will see several tabs. Click on the **Communication** tab.
3. Now, click on **Email Services**.
4. You 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.



The screenshot shows the 'Club Communication' interface. On the left is a sidebar with a 'Services' section containing 'Manage Emails', 'Edit Custom Distribution Lists', 'Email Templates' (highlighted with a red box), 'New Member Templates', and 'Custom Signature'. Below this is a 'Help' section with 'Help Articles', 'Video: Sending an email', and 'Video: Creating Templates'. The main content area is titled 'Club Communication' and includes instructions: 'To modify or resend a message to the same recipients, click the Resend option. Use the Copy option to copy the email with the selected recipients.' It features buttons for 'Show All Emails', 'Show My Emails Only', 'Active Emails' (dropdown), and 'Compose new message'. Below these is a table with columns: Status (dropdown), Subject (dropdown), Owner (dropdown), and Actions. The table contains one row: 'Sent on Dec 01, 2021 at 2:39 PM' | 'Email Subject Line' | 'John Valentine' | a dropdown arrow. At the bottom of the table are 'Check All' and 'Remove Selected' buttons.

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

Email Templates



The screenshot shows the 'Email Templates' management screen. It has a 'Filter records:' search bar and an 'Add New Template' button. Below is a table with columns: Name (with an up arrow), Subject (with a down arrow), and Actions. The table contains two rows: 'Donations' | 'Thank you for your Donation!' | a dropdown arrow; and 'New Member Template' | 'New Member Welcome' | a dropdown arrow.

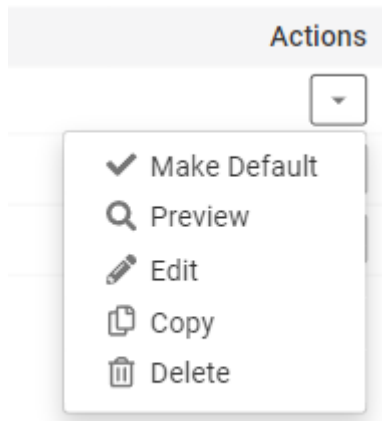
6. You have a number of management options when handling an existing template.

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

Filter records:

[+ Add New Template](#)

Name ^	Subject v	Actions
Donations	Thank you for your Donation!	<input type="button" value="v"/>
New Member Template	New Member Welcome	<input type="button" value="v"/>

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

Name *

Subject

Message Template Code

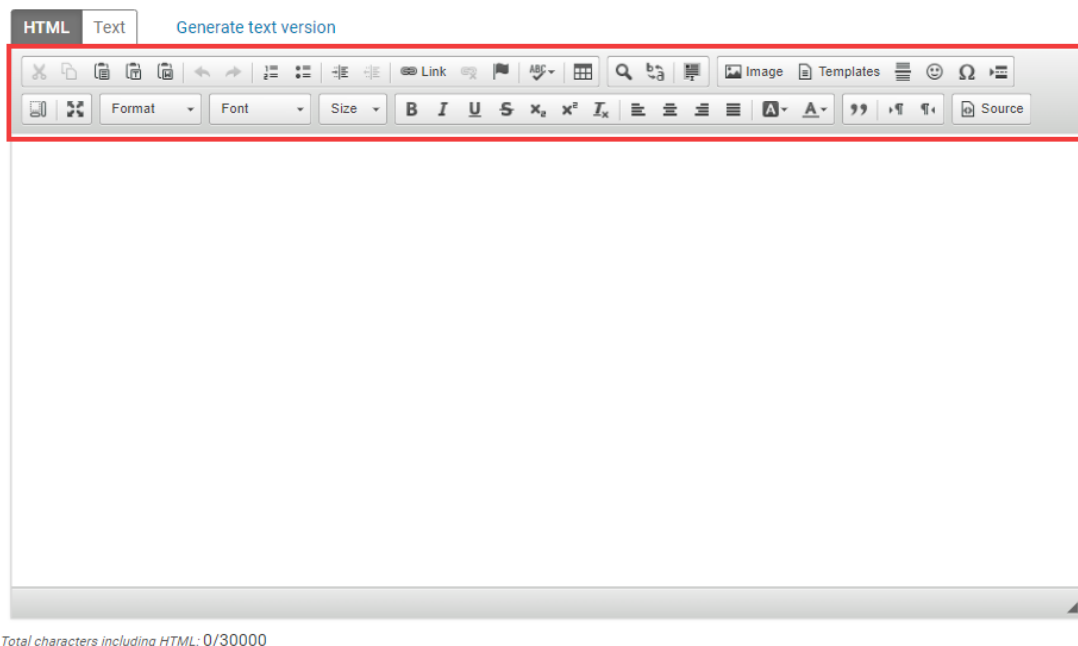
Insert Mail Merge Fields

Recipient

Sender

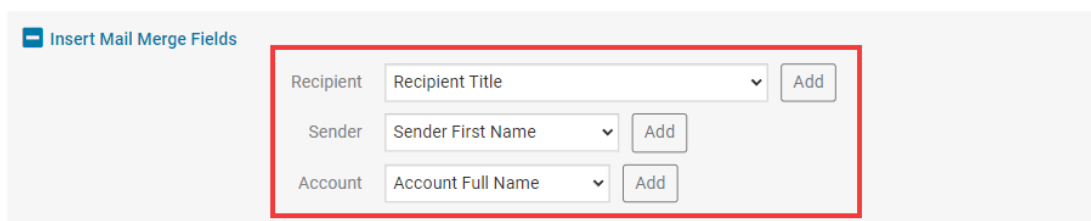
Account

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.



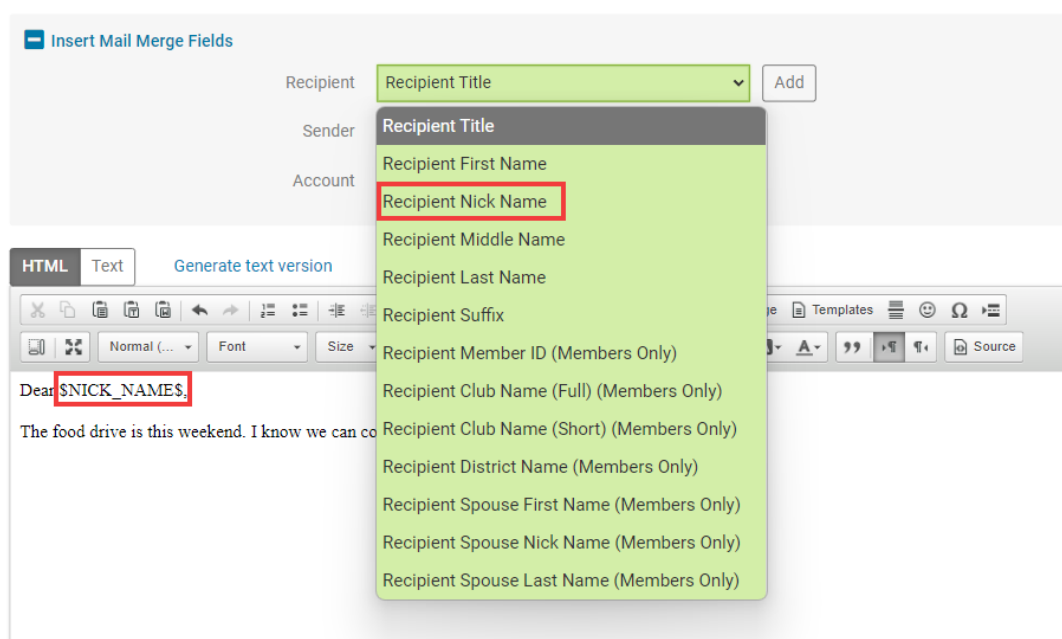
Total characters including HTML: 0/30000

10. To help personalize emails to multiple recipients, you can make use of the **Insert Mail Merge** fields just above the composition window.



11. For example, if you wish to refer to your recipient by first name in the body of the email, select **Recipient Nick Name** from the Recipient menu and click the **Add** button at the appropriate point in your email. This adds a piece of code, which tells ClubRunner to insert the member's nick name from your club database when the email is sent.

Note: The person who receives your email will see only their name, and not the code.



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**.

A screenshot of a web editor interface. At the top, there are tabs for "HTML" and "Text", with "Generate text version" as a link. Below the tabs is a rich text toolbar containing icons for undo, redo, bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, insert link, insert image, image alt text, templates, smiley faces, and source code. The main editing area contains a form letter template. It starts with "Dear \$NICK_NAMES," followed by a blank line, then "The food drive is this weekend. I know we can count on your support!" followed by another blank line. At the bottom left, there is a status bar showing "body div".

Total characters including HTML: 129/30000

Cancel

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?](#)