





How do I create or edit an email template? (District)

Michael C. - 2021-04-20 - Communication

When you're writing standardized district 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.

1. To access **Email Services**, you must go to your district 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 grey tabs. Click on the **Communication** tab.
3. Now, click on **Email Service**.
4. You are now on the **District Communication** screen. Here, you can compose emails and view emails you may have sent. At the left hand side of the screen, you will see the **Email Services** menu. Click on the **Email Templates** feature in the **Email Services** menu
5. You are now on the **Email Templates** screen, where you can view your existing templates, and create a new template.

Email Templates

Filter records:	<input type="text"/>	+ Add New Template
Name 	Subject 	Actions
Default Email Template		
Executive Emails		
Showing all 2 records		

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.

Email Templates

Filter records:

[+ Add New Template](#)

Name ▲		Subject ▼	Actions
Default Email Template			▼
Executive Emails			▼
Showing all 2 records			

- ✓ Make Default
- 🔍 Preview
- ✎ Edit
- 📄 Copy
- 🗑 Delete

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

Email Templates

Filter records:

[+ Add New Template](#)

Name ▲		Subject ▼	Actions
Default Email Template			▼
Executive Emails			▼
Showing all 2 records			

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	<input type="text" value="District Convention"/>
Subject	<input type="text" value="District Convention"/>
Message Template Code	<input type="text"/>

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.

The screenshot shows the 'Insert Mail Merge Fields' panel at the top, which includes three rows of dropdown menus and 'Add' buttons: 'Recipient' with 'Recipient Title', 'Sender' with 'Sender First Name', and 'Account' with 'Account Full Name'. Below this panel is the main email composition window. It has a toolbar with various icons for text formatting (bold, italic, underline, strikethrough, text color, background color), alignment, and other functions. The main text area is currently empty. At the bottom right of the composition window, there are 'Cancel' and 'Save' buttons. A status bar at the very bottom indicates '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.

This is a close-up of the 'Insert Mail Merge Fields' panel. It shows three rows of dropdown menus and 'Add' buttons. The first row is 'Recipient' with 'Recipient Title' selected. The second row is 'Sender' with 'Sender First Name' selected. The third row is 'Account' with 'Account Full Name' selected. Each dropdown menu has a small downward arrow on its right side.

11. For example, if you wish sign the email with the sender's first name, select **Sender First Name** from the **Sender** menu and click the **Add** button when you reach the appropriate point in your email. This adds a piece of code, which tells ClubRunner to insert the sender's first name from your the member database when the email is sent.

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

Insert Mail Merge Fields

Recipient: Recipient Title

Sender: Sender First Name

Account: Account Full Name

HTML Text [Generate text version](#)

Normal (...) Font Size B I U S x₂ x₃ I_x Link Image Templates Source

Dear \$NICK_NAMES \$LAST_NAMES,

The District would like to invite club executives to attend our first annual District Convention. Join with District executives to discuss the problems and opportunities that face you in your community. Help us create a new District level strategy for Rotary in the comin year.

Regards,

\$SENDER_FIRST_NAME

body div

Total characters including HTML: 440/30000

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**.

HTML Text [Generate text version](#)

Normal (...) Font Size B I U S x₂ x₃ I_x Link Image Templates Source

Dear \$NICK_NAMES \$LAST_NAMES,

The District would like to invite club executives to attend our first annual District Convention. Join with District executives to discuss the problems and opportunities that face you in your community. Help us create a new District level strategy for Rotary in the comin year.

Regards,

\$SENDER_FIRST_NAME

body div

Total characters including HTML: 440/30000

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

Email Templates

Filter records:

Name ^	Subject v	Actions
Default Email Template		<input type="button" value="v"/>
District Convention	District Convention	<input type="button" value="v"/>
Executive Emails		<input type="button" value="v"/>

Showing all 3 records

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