

How do I edit the Sender Profiles?

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The “Sender Profile” is the person who is sending emails to the prospect, in other words the “from” email address appearing in the prospect’s inbox. You can setup multiple sender profiles and choose a “default” sender. You can also set a “Sender” but then set a different “Reply to” address. As an example the email might be sent with the club president’s name, but all replies will get directed to the club secretary or membership chair.

To set this up:

1. Login to your club's **Member Area**.
2. In the Member Area click **Membership Success** in the top blue bar.
3. In the grey bar bar below click **Overview**.
4. Down the left side click **Sender Profiles**.
5. Click the ‘down arrow’ icon to the right of any Sender Profile, then click **View**.

The screenshot shows the 'Sender Profiles' management page in ClubRunner. On the left is a sidebar with navigation links: Getting Started, View Prospects, Forms (Refer a Member, Membership Inquiry), Settings (Sender Profiles, Recipient Profiles, Automation Tasks, Email Templates), and Help (Help Articles). The main content area is titled 'Sender Profiles' and includes a description: 'Sender profiles are standardized "from" email addresses that can be re-used for any emails generated within the system. The profile includes the sender name and email address which will appear in the recipient's inbox.' Below this is a 'Filter records:' search box. A table lists three sender profiles:

Name	Description	Sender	Email	Is Default	Actions
Club Secretary	Current year club secretary	John Doe	johnd@sink.sendgrid.net	False	[Dropdown Arrow]
Donation Sender Profile	Sender Profile for the donation module	Rotary Club of Green Town	support@clubrunner.ca		[Set As Default] [View] [Delete]
From the Club	The name of the club with the Membership Success Chair's email	\$ACCOUNT_FULL_NAMES	changeme@sink.sendgrid.net		[Dropdown Arrow]

At the bottom, it says 'Showing all 3 records'. A red box in the original image highlights the 'View' button in the 'Donation Sender Profile' row.

6. Click the **Edit** button to edit this Sender profile.
7. You can update the information here. You can also choose to make the **reply-to** a different person than the **sender**. From our example you may wish to make emails come from the club president, but when the recipient replies it will go to the club secretary.
8. If you check “**Set as Default**” this Sender profile becomes the default sender for all emails going out of the Membership Success module.

Edit Sender Profile Details

Emails go out with club president's name, but all replies go to club secretary.

body div

Sender Name *
Jane Francis

Sender Email *
jane@sink.sendgrid.net

☐ Reply-To same as Sender

Reply-To Name *
John Doe

Reply-To Email *
johnd@sink.sendgrid.net

☐ Set as Default

Cancel Save

9. Click **Save** to save changes, then **Go Back** to return to the previous screen.
10. You'll now be able to select these Sender Profiles when sending out emails.