ClubRunner

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How do I edit the Sender Profiles?

Mickey D. - 2022-10-24 - Membership Success

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.

Getting Started					~	- Go back
View Prospects	Sender Profiles					
Forms						
Refer a Member	Sender profiles are standar email address which will ar	dized "from" email addresses that can be re	 used for any emails generated 	within the system. The profile inc	cludes the sender n	ame and
Membership Inquiry	cinal address which will a	spear in the recipients moox.				
Settings	Filter records: Q					
Sender Profiles					ls	
Recipient Profiles	Name *	Description 🗸	Sender 🗸	Email 👻	Default 🗸	Actions
Automation Tasks	Club Secretary	Current year club secretary	John Doe	johnd@sink.sendgrid.net	False	•
Email Templates	Donation Sender Profile	Sender Profile for the donation module	Rotary Club of Green	support@clubrunner.ca	✓ Set As Def	ault
Help			Town		Q View	
Help Articles	From the Club	The name of the club with the Membership Success Chair's email	\$ACCOUNT_FULL_NAME\$	changeme@sink.sendgrid.net	Delete	
	Showing all 3 records					

- 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	×
B I U A · E Ξ Ξ Normal (· Font · Size · ⊙ Source	
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	ave

- 9. Click ${\bf Save}$ to save changes, then ${\bf Go}\;{\bf Back}$ to return to the previous screen.
- 10. You'll now be able to select these Sender Profiles when sending out emails.