

ClubRunner

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How do I send event-related emails and invitation?

Omar S. - 2021-03-24 - [Events & Calendar](#)

Inside of Event Planner you can send **two** different types of emails. These are located near the bottom of the Event Planner page while editing an event.

Emails				
Please note that you will need to use the New Invitation feature to specify the invitees, so that the Undecided reports will be functional.			New Invitation	New Email
Date Last Sent	Subject	Owner	Actions	
No email for this event yet.				

Please click on one of the links for the steps to send an Invitation Email or regular Email.

New Invitation: Is a template email message that sends an invitation for the event to the selected recipients. The recipients will receive an email detailing the event along with an **Attend or Decline** link that takes them to the event registration form. This link is a special link, because the recipient do not have to login to ClubRunner. So if the member does not know their login information, they can still register or decline for the event.

New Email: This is your typical email, no template, no event information, just a blank email for you to enter what you would like.

Sending a New Invitation

Step 1: Select Recipients.

Select the recipients by clicking on the check mark boxes. You could expand the lists by clicking on the blue plus buttons. You can select individual members, or choose to send messages to everyone in a given list. There are several different groups you can choose from.

By Status - Undecided members or Uninvited members.

Active and Honorary Members - This displays the active and honorary members list.

Other Users - This displays the other users list.

Inactive Members - This displays the inactive members list.

Custom Distribution Lists - A list of the custom distribution lists.

Contact Groups - This displays a list of contact groups from the contacts area.

In this case, we have selected to send our email to all the active and honorary members of the club.

Step 1:

Select the recipients of this message by expanding each category, then clicking the "Expand List" link. Please note: you will not be able to select recipients that have not supplied an email address.

- By Status (0/18)
- Active and Honorary Members (13/16)
- Other Users (0/2)
- Inactive Members (0/4)
- Custom Distribution Lists (0/15)
- Contact Groups (0/2123)

Step 2: Enter your email subject and message.

This is where event chair designs the invitation. Even though the invitation pre-loads a template, it is customizable meaning you can add or delete the content within the editor.

Step 2:

Enter your email subject and message.

Select Template: -- Select Group --

Subject: Event Invitation for \$EVENT_NAMES*

Insert Mail Merge Fields

Recipient: Recipient Title

Sender: Sender First Name

Account: Account Full Name

Event Planner: Event Name

Message:

The screenshot shows an email editor interface. At the top is a toolbar with various icons for editing text and images. Below the toolbar is a rich text editor area. The message body contains the following text:

You are invited to the \$EVENT_NAMES. Please click on the link below to attend or decline. You can also book family and friends.

Event:	\$EVENT_NAMES
Date:	\$EVENT_START_DATES - \$EVENT_END_DATES
Fee:	\$EVENT_FEES
Location:	\$EVENT_LOCATIONS
SVIEW_MAPS	
Details:	\$EVENT_DETAILS

Total characters: 1236/100000

1. The **Select Template** fields lets you be able to choose from pre-made templates which a member/members created. We recommend to use the default template found in the body of the email below.

Select Template: -- Select Group --

2. **Subject** - This is where the event chair would enter a subject for the event invitation. This is a required field.

3. **Insert Mail Merge Fields** - Overview.

Recipient: Recipient Title Add

Recipient: This drop down field is used for the event chair to identify the recipient and inserts the information into the body of the invitation. For example: if the event chair selects *Recipient First Name*, the text \$FIRST_NAME\$ will get inserted into the body of the invitation. When the recipient receives the email it displays the recipient's 's name instead of \$FIRST_NAMES\$.

- Recipient Title
- Recipient First Name
- Recipient Nick Name
- Recipient Middle Name
- Recipient Last Name
- Recipient Suffix
- Recipient Member ID (Members Only)
- Recipient Club Name (Full) (Members Only)
- Recipient Club Name (Short) (Members Only)
- Recipient District Name (Members Only)
- Recipient Spouse First Name (Members Only)
- Recipient Spouse Nick Name (Members Only)
- Recipient Spouse Last Name (Members Only)
- Recipient Type
- Courtesy of

Sender: Sender First Name Add

Sender: This drop down field is used for the Event Chair to identify the sender and inserts that information into the body of the invitation. For example: if the event chair selects *Sender First Name*, the text \$SENDER_FIRST_NAME\$ will get inserted into the body of the invitation. When the recipient receives the email it displays the sender's 's name instead of \$SENDER_FIRST_NAMES\$.

- Sender First Name
- Sender Nick Name
- Sender Middle Name
- Sender Last Name
- Sender Club Name (Short)
- Sender Club Name (Full)

Account: Account Full Name Add

Account: This drop down field is used to display the club name. The information here is pulled from the Edit Club Info & Settings which can be found under the Administrator section in the Admin page

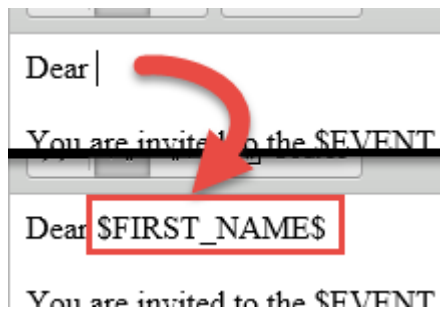
- Account Full Name
- Account Short Name
- Account home page

Event Planner: Event Name Add

Event Planner: This drop down field is used for the Event Chair to insert information about the event into the body of the invitation. For example: if the event chair selects *Event Name*, the text \$EVENT_NAME\$ will get inserted into the body of the invitation. When the recipient receives the email it displays the event's name instead of \$EVENT_NAME\$

- Event Name
- Event Contact
- Event start date
- Event end date
- Event start time
- Event end time
- Event Location & Address
- Event Details
- Event fee
- Register Online Link - General
- Register Online URL - General
- Attend or Decline Link - Member
- Attend or Decline URL - Member
- View Map
- Event Chair

4. To insert a mail merge field, simply put your mouse cursor in the area in the editor where you would like the merge fields to appear. Then click the **Add** button.



Step 3 (Optional): Upload attachments to your email.

If you would like to add an attachment to the invitation, simply click on the **Select Files for Upload** button and search on your computer for the file that you would like to attach.

Note: The maximum limit is 6 MB

Step 3 (Optional):

Upload attachments to your email.

Total attachment size: 0 B/6.00 MB

Select Files For Upload

Step 4: Choose your email options and send.

There are two available options before sending an invitation:

Send a list of recipients as an attachment: This will send a list of all of the recipients as an attachment.

Copy me on this email: This will add the sender to the CC (carbon copy) list.

Step 4:

Choose your email options and send.

- Send a list of recipients as an attachment.
- Copy me on this email.

Step 5: Choose when to send the email.

There are two options of when you can send the email.

Send right now - This send the email right away.

Schedule - This lets you select the time and date of when the email will be sent.

Step 5:

You can send the email right now, or click on schedule to choose when you would like to send it.

- Send right now
- Schedule

Near the bottom right gives three options to send or to save the email:

Save as Draft: This will save the email invitation (including all changes that you made) as a draft for you to complete later. You will see your draft email under the **Emails** section in the event.

Send Test Email To Myself Only: This will send an test email to you to review. Since this is a test email, the mail merge fields in Step 2 will not appear.

Send: This will send the email to the selected recipients.



Sending an Email

Step 1: Select Recipients.

Select the recipients by clicking on the check mark boxes. You could expand the lists by clicking on the blue plus buttons. You can select individual members, or choose to send messages to everyone in a given list. There are several different groups you can choose from.

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- Custom Distribution Lists (0/15)
- Contact Groups (0/2123)

Step 2: Enter your email subject and message.

This is where you write the email.



1. The **Select Template** fields lets you be able to choose from pre-made templates which a member/members created.

Select Template:

2. **Subject** - This is where the event chair would enter a subject for the event email. This is a required field.

3. **Insert Mail Merge Fields** - Overview.

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- Recipient Nick Name
- Recipient Middle Name
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Sender:

- Sender First Name
- Sender Nick Name
- Sender Middle Name
- Sender Last Name
- Sender Club Name (Short)
- Sender Club Name (Full)

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Account:

- Account Full Name
- Account Short Name
- Account home page

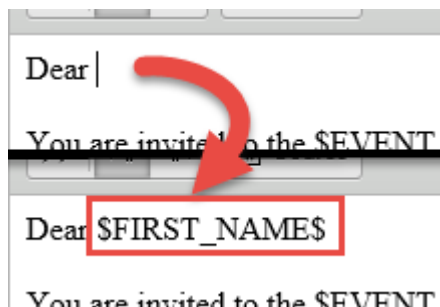
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Send: This will send the email to the selected recipients.

Save as Draft

Send to Myself

Send

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