

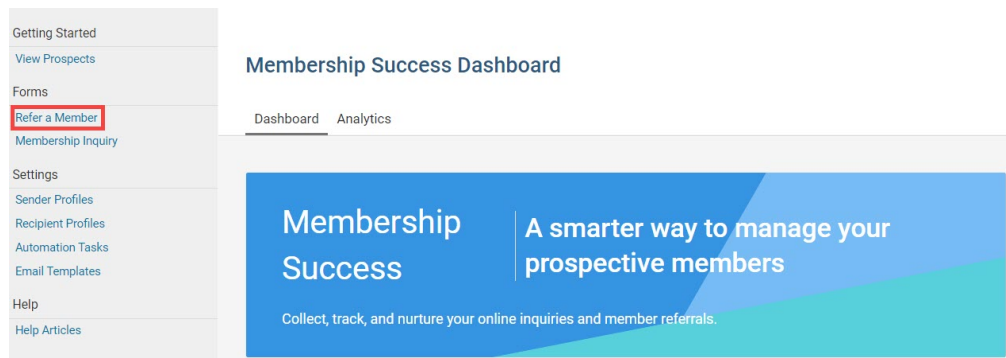
How do I share the Referral form with members?

Omar S. - 2022-10-21 - Membership Success

Your members can refer potential prospects to the club using an online form. This article will go through the steps of how to access and link the “Refer a Member” form from the Membership Success module.

Note: This is a private form, meaning only club members with a valid ClubRunner login are allowed to access and fill out this form.

1. To begin 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 **Refer a Member**. This typically opens the form in a new browser tab.



5. With the Member Referral form page open on the website, right-click the **Website Address** and click the **Copy** option.

https://portal.clubrunner.ca/11823/Form/refer-a-member

Refer a Member

Share your passion for Rotary by referring a prospective member to our community and across the globe.

Submitter Details

Enter your contact details below.

First Name *

Last Name *

Email *

Prospective Member Details

Enter the details of whom you wish to refer as a member to our club. An email will be sent notifying them that they were referred by you.

6. With the Member Referral Form URL saved to your clipboard, open the **Send Email** page to compose a new email.

Note: For an overview on creating and sending emails in ClubRunner, please see [How do I send an email](#) from our Knowledgebase.

7. In the email's **Content** textbox **paste** the URL, or enter text for the reader to click and open the form.
8. Highlight the text the reader should click to open the application form, then click the **Link** button in the toolbar.

Refer new members to our Club!

Templates and Merge Fields

Select Template -- Select Group --

Recipient Recipient Title

Add

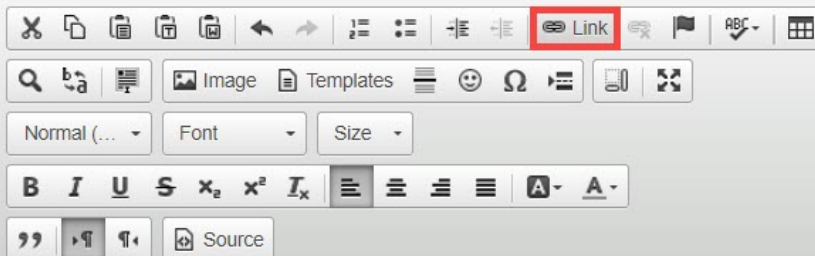
Sender Sender First Name

Add

Account Account Full Name

Add

The Nick Name merge field will be replaced by First Name if it is empty.



Dear \$NICK_NAME\$ \$LAST_NAME\$,

We welcome you to refer members to our club!

To refer a member, enter their application information & details into the Refer a Member form on our website:

<https://portal.clubrunner.ca/11823/Form/refer-a-member>

[Or click here to open the Member Referral form on your browser.](#)

Thank you for referring new members to our club!

9. In the Link dialog, **paste** the Member Referral Form link into the **URL field**.

The image shows a 'Link' dialog box with three tabs: 'Link Info', 'Target', and 'Advanced'. The 'Link Info' tab is active. It contains a 'Link Type' dropdown menu set to 'URL'. Below it is a 'Protocol' dropdown menu set to 'https://'. To the right of the protocol is a text field containing the URL 'inner.ca/11823/Form/refer-a-member', which is highlighted with a red rectangular border. At the bottom of the dialog are two buttons: a green 'OK' button and a grey 'Cancel' button.

10. Click the green **Ok** button to save the link to the highlighted text in the email.

Note: When linking items in emails, you can also link a highlighted image in the email's content. For a review of how to add a link to the text and images in emails, website stories, or widgets on the website, please see [How do I add a link](#) found in our Knowledgebase.

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11. Email recipients can click the link, linked text or linked image in the email to open the Membership Referral form on the website. Note when members click this private link, our system may prompt them to login to ClubRunner if they have not already done so. If non-members click this link all they will see is our ClubRunner login page.

Subject *

Refer new members to our Club!

■ Templates and Merge Fields

Select Template -- Select Group --

Recipient	Recipient Title	▼	Add
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Sender	Sender First Name	▼	Add
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Account	Account Full Name		Add
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Thank you for referring new members to our club!

Note: Now that you have the Membership Referral URL, you can put link this into your top homepage menu too. See our Help article [How do I build the navigation menu?](#) from our Knowledgebase.