

New member email templates

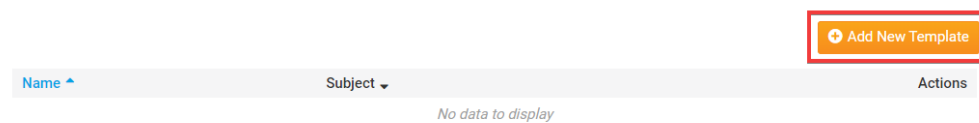
Michael C. - 2022-02-07 - Communication

When you're writing standardized club 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.

Create a new member email template

1. To access the **Email Template** feature, you must go to your club 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 tabs. Click on the **Communication** tab.
3. Now, click on **Email Services**.
4. You are now on the **Club Communication** screen. At the left side of the screen, you will see the **Email Services** menu. To create a template for a standard email to be sent to new members, click on **New Member Template** under the **Email Services Menu**
5. You are now on the **New Member Templates** screen, where you can create new email templates or edit existing ones. Click the **Add New Template** link near the right side of the screen.

Email Templates



6. You are now in the Email Template Editor. 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

New Member Greeting

Subject

Welcome to Green Town Rotary!

Message Template Code

Insert Mail Merge Fields

Recipient

Recipient Title

Add

Sender

Sender First Name

Add

Account

Account Full Name

Add

HTML

Text

Generate text version

Format

Font

Size

B

I

U

S

x₂

x²

I_x

Link

Image

Templates

Source

Dear \$NICK_NAMES\$ \$LAST_NAMES\$,
You have joined the Green Town Rotary at an exciting time. As a new member, you are probably eager to learn about how you can help our community and get the most from our club.
As such, we'd like to invite you to our next New Member Social, which takes place January 14th, 2022. You'll receive a formal invitation soon. In the meantime, if you have any questions, feel free to contact me!
Kind regards,
body div

Total characters including HTML: 573/30000

7. 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 links, and more.

Insert Mail Merge Fields

Recipient

Recipient Title

Add

Sender

Sender First Name

Add

Account

Account Full Name

Add

HTML

Text

Generate text version

Normal (...)

Font

Size

B

I

U

S

x₂

x²

I_x

Link

Image

Templates

Source

Dear \$NICK_NAMES\$ \$LAST_NAMES\$,
You have joined the Green Town Rotary at an exciting time. As a new member, you are probably eager to learn about how you can help our community and get the most from our club.
As such, we'd like to invite you to our next New Member Social, which takes place January 14th, 2022. You'll receive a formal invitation soon. In the meantime, if you have any questions, feel free to contact me!
Kind regards,
body div

Total characters including HTML: 573/30000

Cancel

Save

8. To help personalize emails to multiple recipients, you can make use of the **Insert Mail Merge** fields just above the composition window.

- When you are happy with your template, click **Save** at the bottom center of the screen. If you wish to scrap the template, click **Cancel**.
- The new Email Template will now appear in the **Email Templates** area.

Email Templates

Add New Template		
Name ^	Subject v	Actions
New Member Greeting	Welcome to Green Town Rotary!	

Set a new member email template as default

Make sure that once you've created your new template, that you also take the time to set it as the default. This ensures that when creating new members, your chosen template is used instead of the ClubRunner default.

1. To access the **Email Template** feature, you must go to your club 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 tabs. Click on the **Communication** tab.
3. Now, click on **Email Services**.
4. You are now on the **Club Communication** screen. At the left side of the screen, you will see the **Email Services** menu. Click on the **New Member Templates** option in the **Email Services** menu.
5. On the list of email templates, locate the email you wish to set as default and under the Action drop down, choose **Make Default**.

Email Templates

Add New Template		
Name ^	Subject v	Actions
New Member Template	Welcome to the club of Purple Metro!	

✓ Make Default

Preview

Edit

Copy

Delete

6. You should now see that your preferred email template has been set as default.

Email Templates

Add New Template		
Name v	Subject v	Actions
New Member Template	Welcome to the club of Purple Metro!	Default

Related Content

- [How do I add a new member?](#)
- [How do I transfer a member to my club?](#)