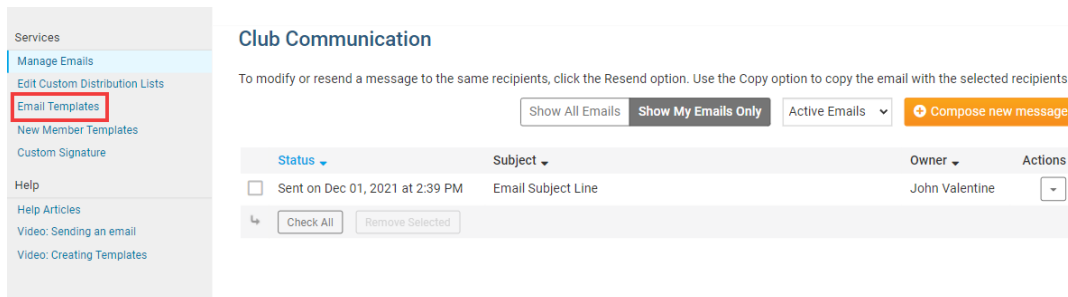


## How do I create and edit email templates?

Michael C. - 2021-12-08 - Communication

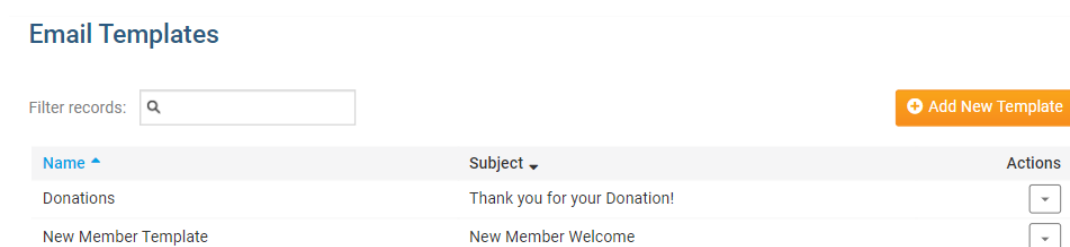
When you're writing standardized club emails, you may find it useful to create an **Email Template**. An email template is a standard email format that can be saved in ClubRunner, and used whenever its needed. For example, you might wish to create a standard template for a new member welcome email, or to remind members of overdue invoices.

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, which is highlighted below. Click on the **Email Templates** feature in the **Email Services** menu.



The screenshot shows the 'Club Communication' interface. On the left, a 'Services' sidebar contains a menu with 'Email Templates' highlighted in red. The main content area is titled 'Club Communication' and includes a 'Compose new message' button and a table of email records. The table has columns for 'Status', 'Subject', 'Owner', and 'Actions'. One record is visible: 'Sent on Dec 01, 2021 at 2:39 PM' with subject 'Email Subject Line' and owner 'John Valentine'.

5. On this screen, you can view your existing templates, and create a new template.



The screenshot shows the 'Email Templates' management screen. It features a search bar for filtering records and an 'Add New Template' button. Below is a table with columns for 'Name', 'Subject', and 'Actions'. Two templates are listed: 'Donations' with subject 'Thank you for your Donation!' and 'New Member Template' with subject 'New Member Welcome'.

6. You have a number of management options when handling an existing template.

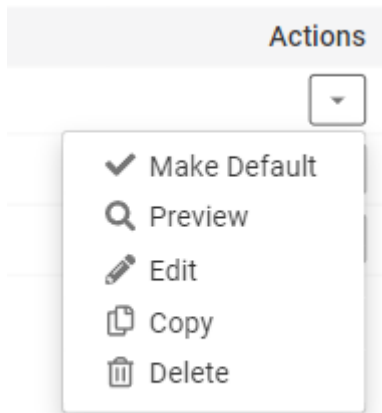
**Make default:** Select this to make the template the default when composing a new email.

**Edit:** This features opens the template in an editing window, for updates and other

changes.

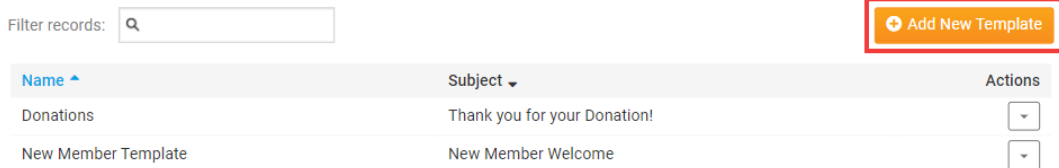
**Preview:** This feature displays the template as it will appear in email.

**Delete:** This deletes the template. A prompt will appear, asking if you are sure you want to delete the template.



7. To create a completely new template, click the **Add New Template** button.

## Email Templates

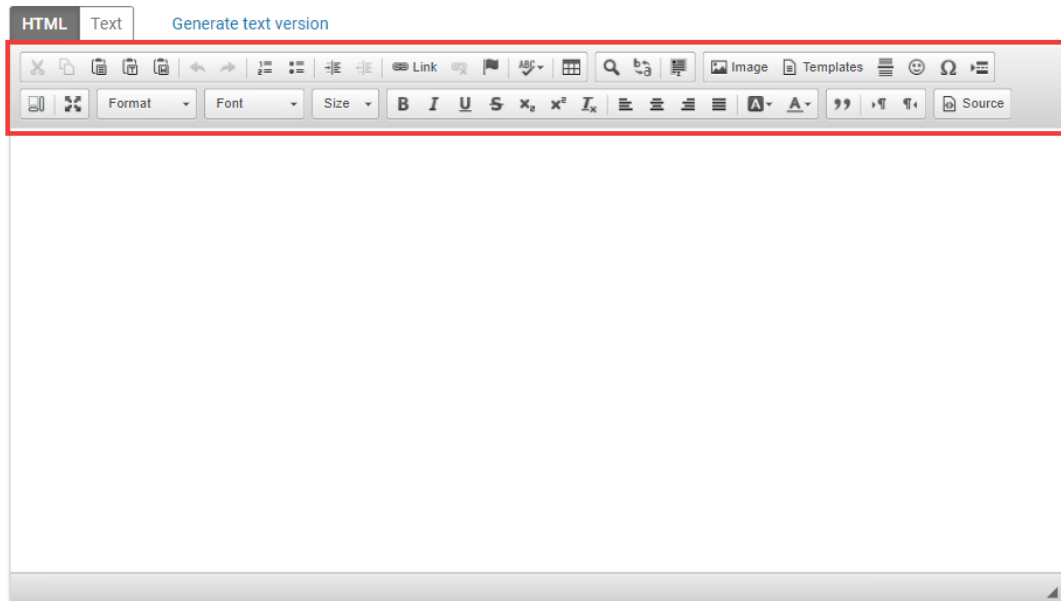


8. You are now on the **Add Message Template** window. You can enter a **Name** and **Subject** for your template. The name field is the template's file name used for internal purposes, while the subject field will appear as the subject line of the resulting email.

## Add Message Template

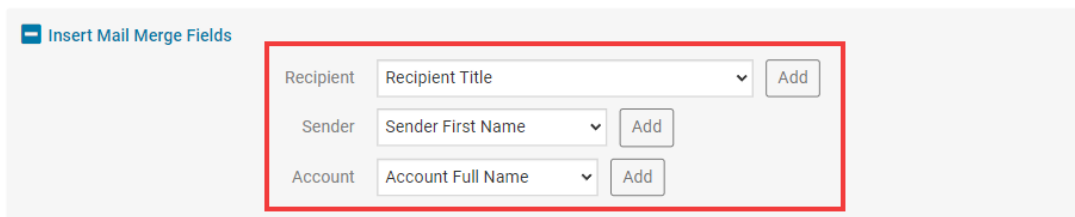
A screenshot of the 'Add Message Template' form. The 'Name' field contains 'Food Drive Appeal' and the 'Subject' field contains 'Rotary Club of Green Town needs your help!'. A red box highlights these two fields. Below them is a 'Message Template Code' field. At the bottom, there is a section titled 'Insert Mail Merge Fields' with three rows: 'Recipient' (Recipient Title), 'Sender' (Sender First Name), and 'Account' (Account Full Name). Each row has a dropdown menu and an 'Add' button.

9. 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 images, and more.



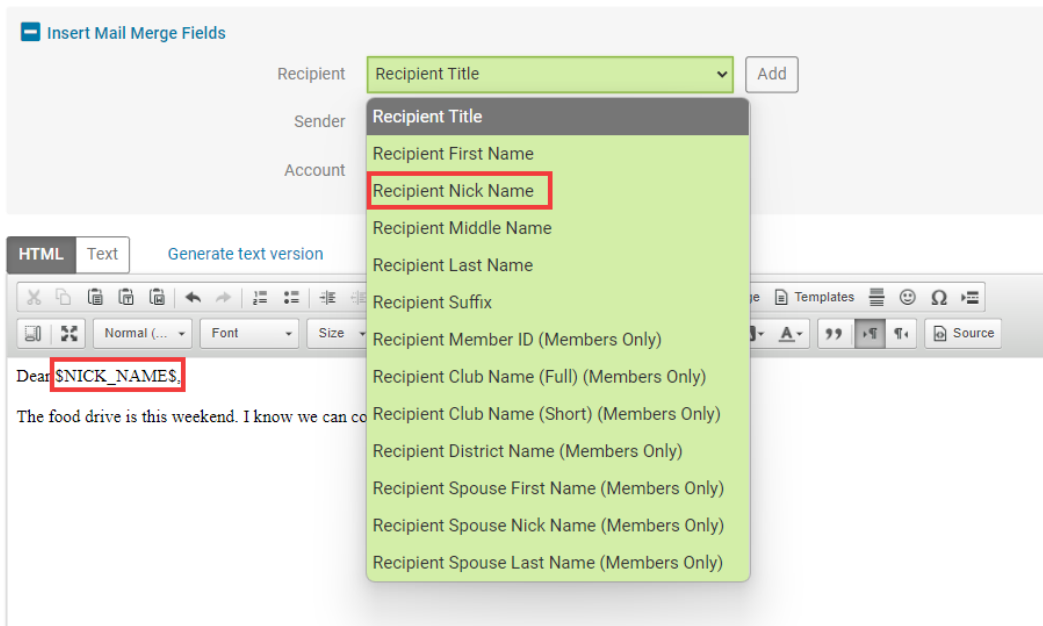
Total characters including HTML: 0/30000

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

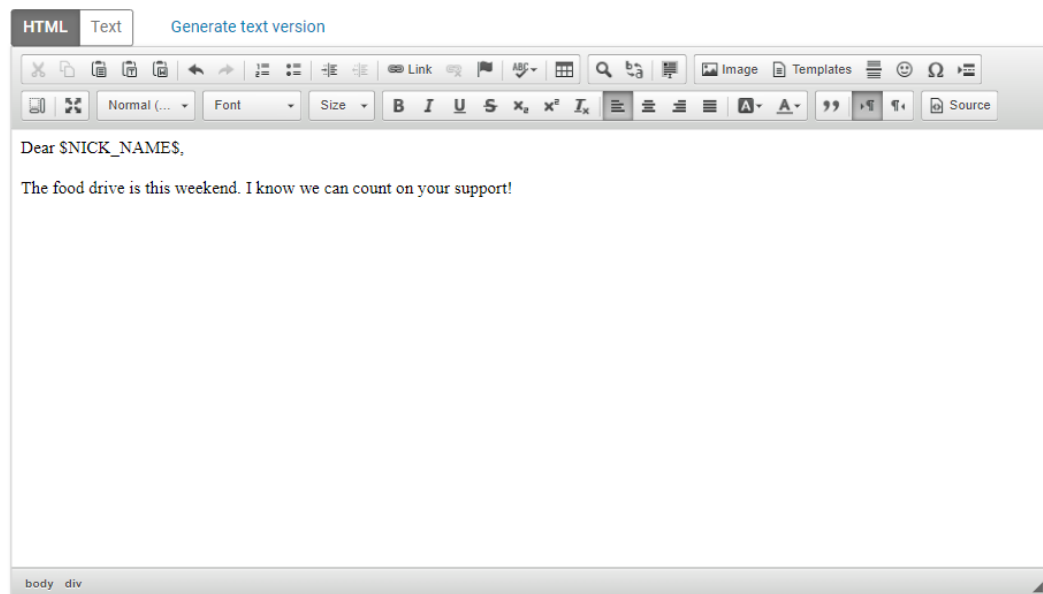


11. For example, if you wish to refer to your recipient by first name in the body of the email, select **Recipient Nick Name** from the Recipient menu and click the **Add** button at the appropriate point in your email. This adds a piece of code, which tells ClubRunner to insert the member's nick name from your club database when the email is sent.

**Note:** The person who receives your email will see only their name, and not the code.



12. When you are happy with your template, click **Save** at the bottom right of the screen. If you wish to scrap the template, click **Cancel**.



Total characters including HTML: 129/30000

Cancel **Save**

13. The new Email Template will now appear in the **Email Templates** window.

## Email Templates

Filter records:

[+ Add New Template](#)

Name <span>▲</span>	Subject <span>▼</span>	Actions
Donations	Thank you for your Donation!	<span>▼</span>
Food Drive Appeal	Rotary Club of Green Town needs your help!	<span>▼</span>
New Member Template	New Member Welcome	<span>▼</span>

### Related Content

- [VIDEO: How do I create an email template?](#)
- [VIDEO: How do I send an email?](#)