

Emailing in ClubRunner

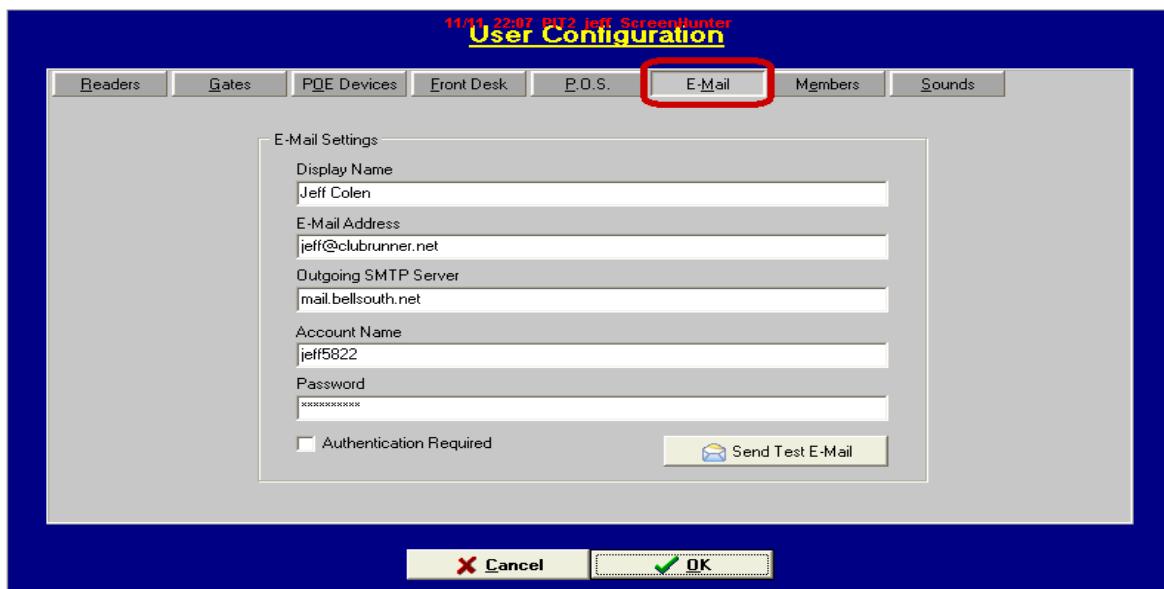
ClubRunner has the capability of emailing directly within the program, either individually or in mass. Additionally, it is very easy to export email information in to a 3rd party program, such as Microsoft Word, and email from there.

Setup

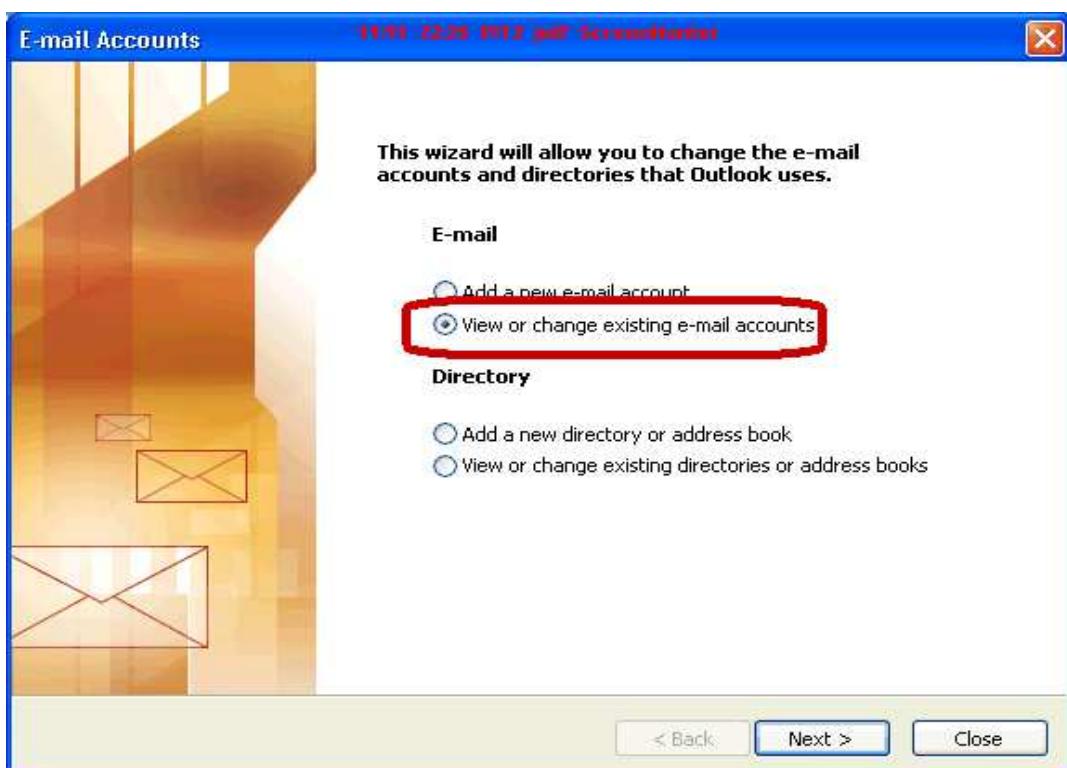
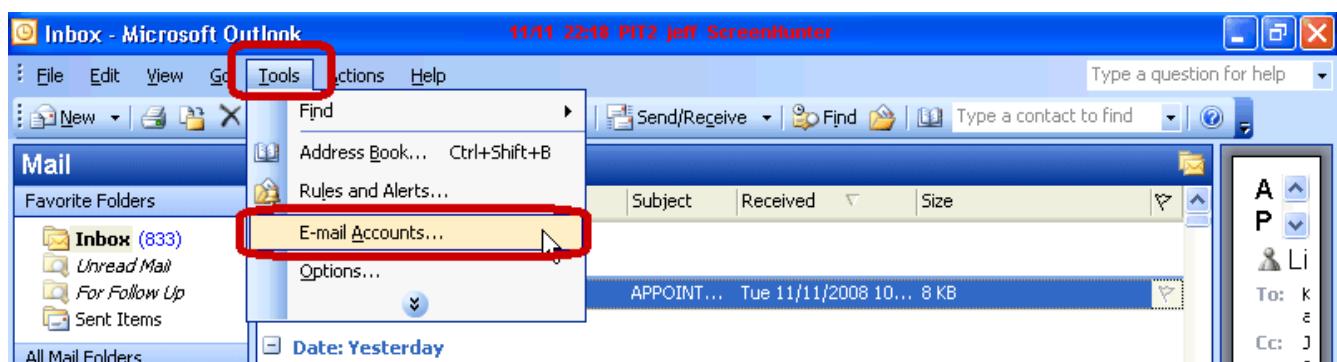
First things first, you'll need to configure ClubRunner to "talk" to your email server. This is set up from the Main Menu under "Quick Commands/ Configuration"...

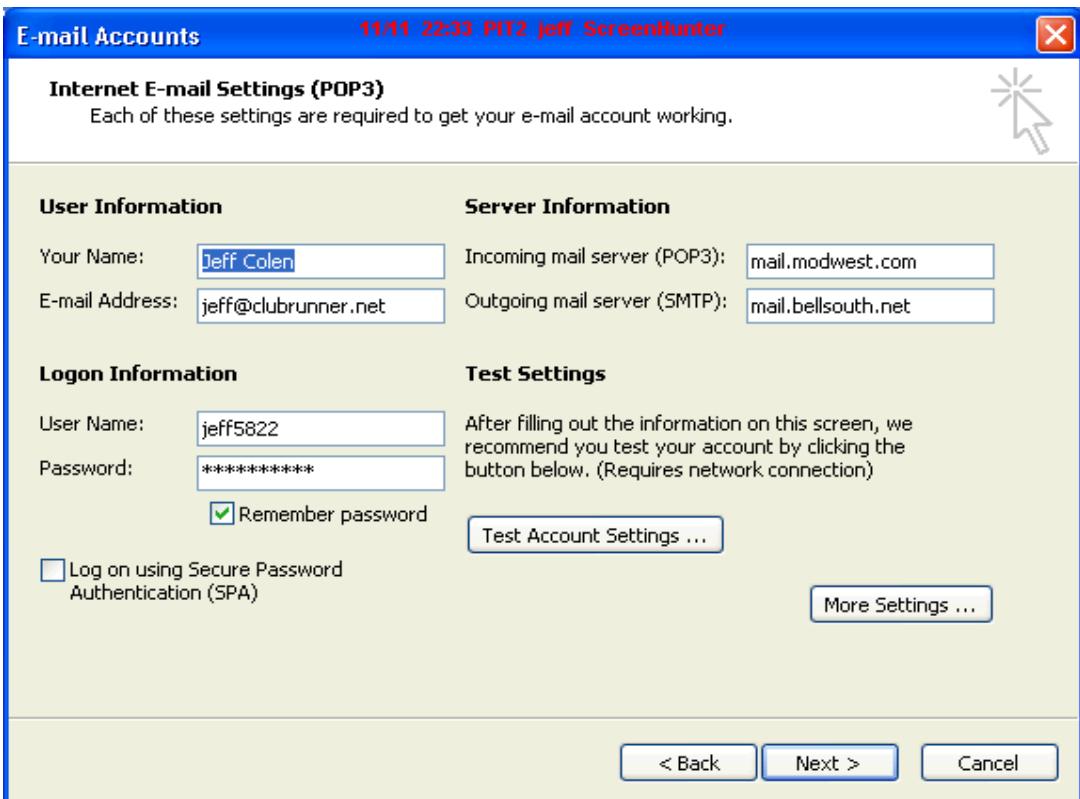
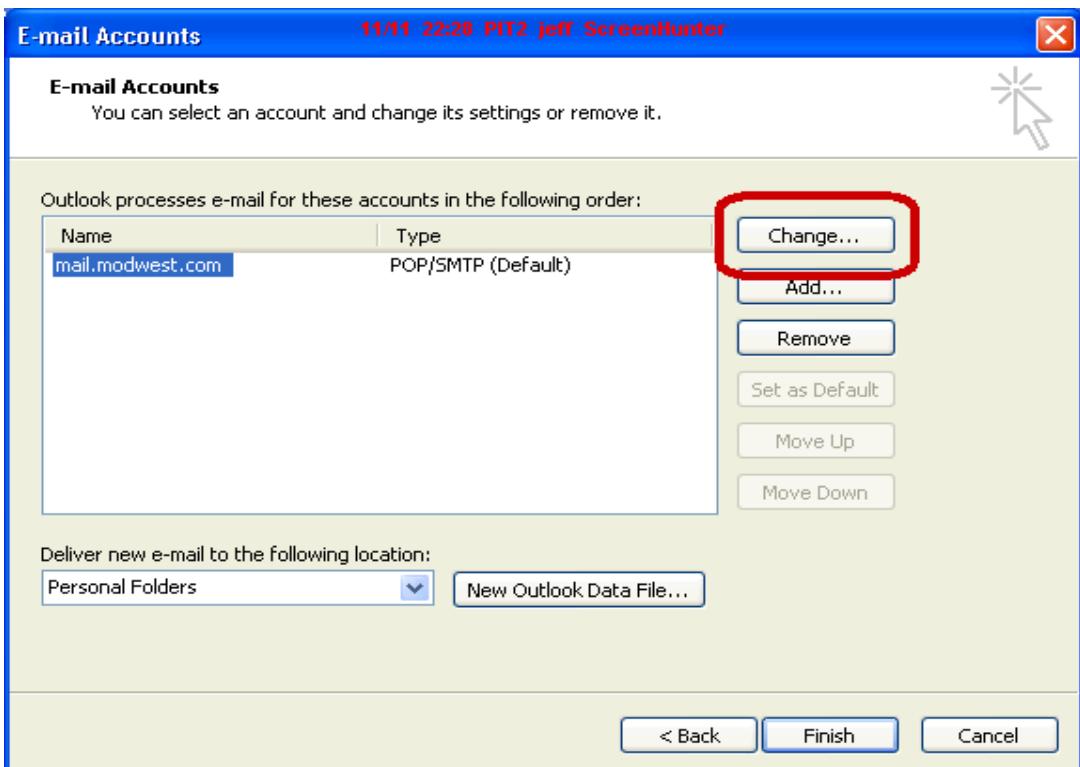


ClubRunner will ask for the "master" password. If you do not know it, please contact us (561-746-3392). Once you are in to the Configuration set up, click on the E-Mail tab...

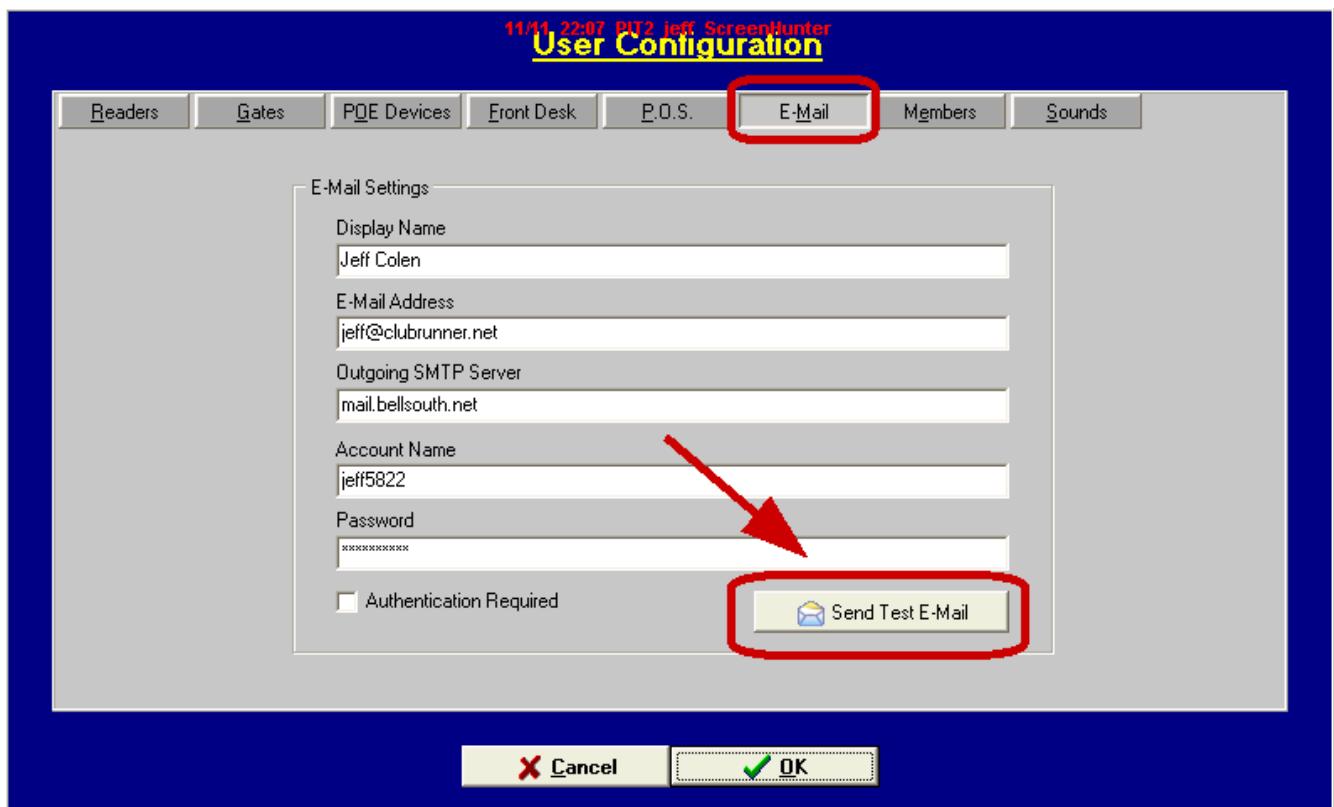


The settings that you'll need to fill in are standard. They exactly match the setting in Outlook or Outlook Express. Below is where you'll find the settings in Outlook, or, get them from your E-Mail administrator...





Fill in the appropriate information on the E-Mail Configuration tab. When you're done, click the "Send Test E-Mail" button and check your email!

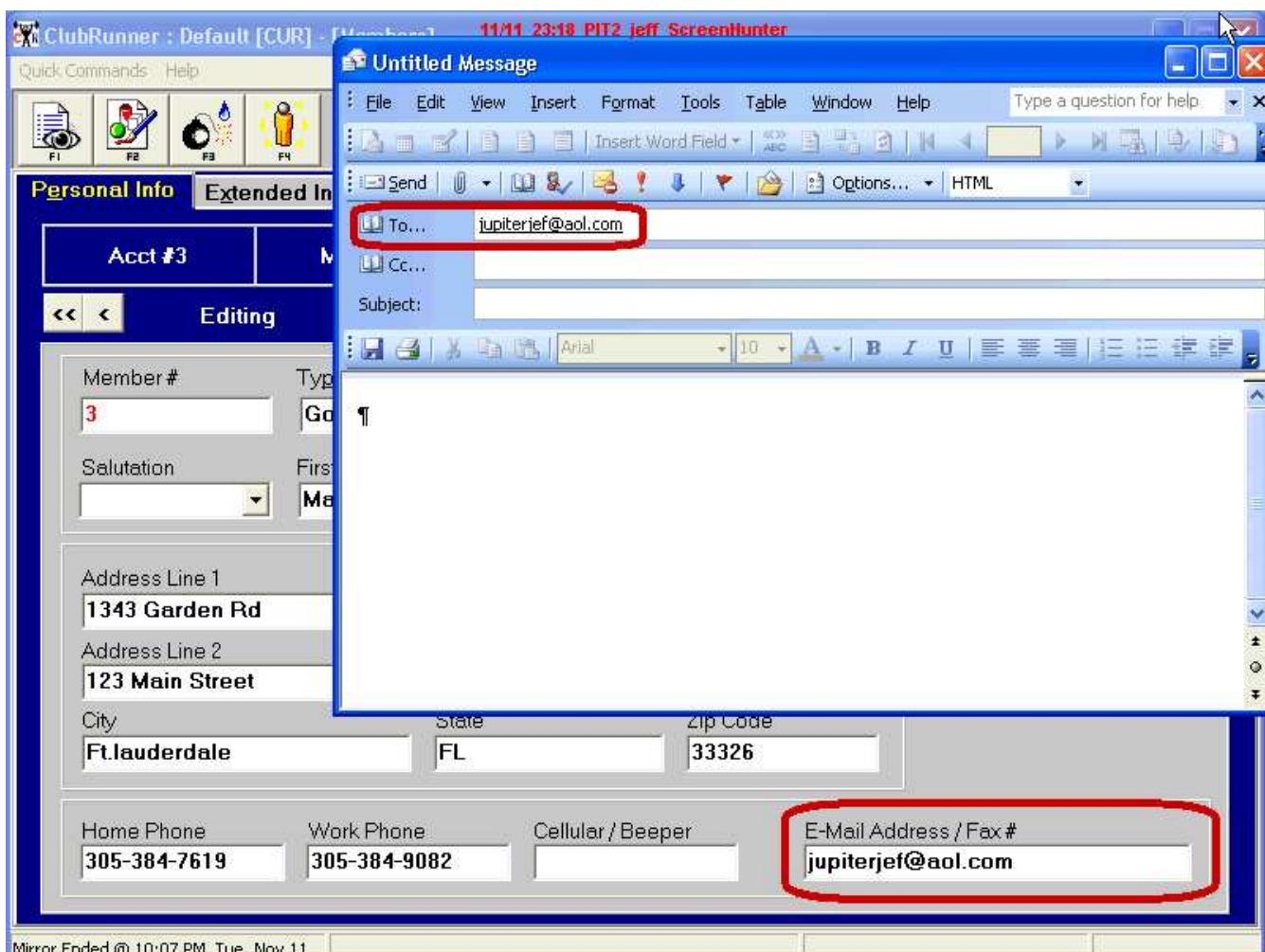


If you get the test email, you've filled in the configuration properly. If not, contact your computer technician or your email administrator. ***Do not proceed until your test email works!***

Individual E-Mails

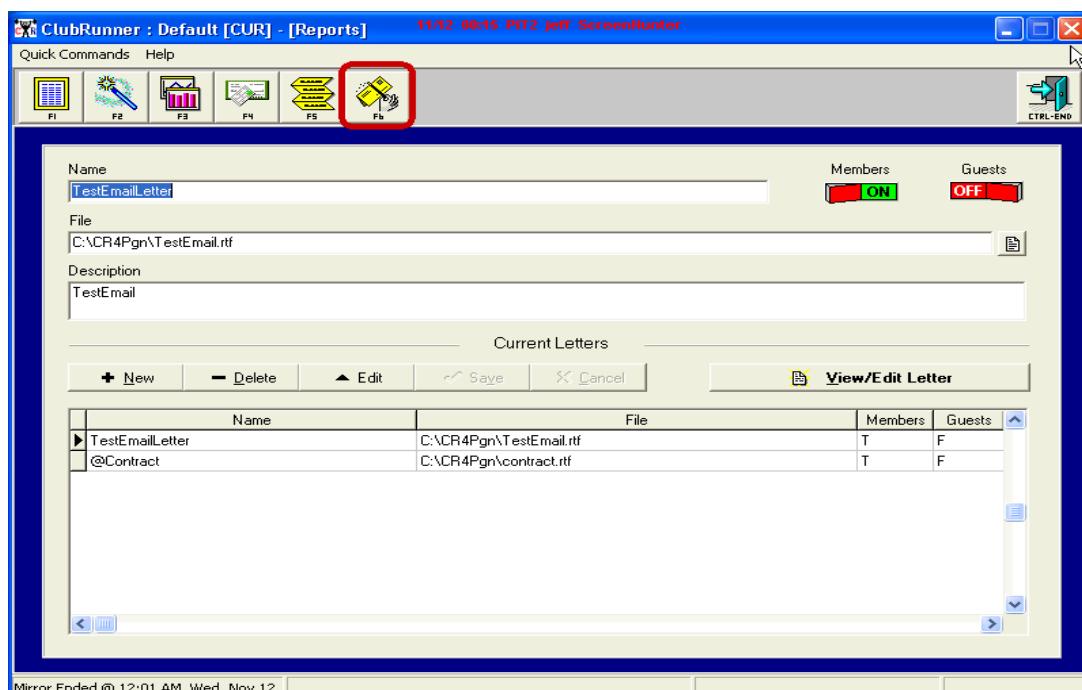
In the Member or Guest module, ClubRunner will “pop” up your default e-mail program with the member or guest's email address filled in and ready for you to type your e-mail. Just click the e-mail button, and select either “Quick Mail” or choose one of the merge letters that you have already set up. The merge letters can be configured to integrate member or guest information in to the body of the letter. Merge e-mails are identical to what is commonly known as mail merge letters...





E-Mail Merges

ClubRunner has the capability of taking any mail merge letter and e-mail merge it. These letters are set up in the Reports module...



This “example” letter (TestEmailLetter) can be created with Notepad, Word pad, or Word (or any similar text editor), but, there are some limitations...

- 1) **The letter must be saved in what is known as a “Rich Text Format” (rtf).** When you e-mail from ClubRunner, your graphic capabilities are restricted. Fonts and bolding / italics are supported, but you cannot email graphics such as “logos”.
- 2) **The letter's name and file path (it's location) cannot contain any spaces.** So, saving your letter to a folder called “My Documents” will not work, because of the space between “My” and “Documents”.
- 3) **The “Name” of the letter (the first field on the Mail Merge Setup page), in this example “TestEmailLetter” cannot have a space in it.**

ClubRunner can substitute in to the letter most fields (data) that we know about the member or guest. Below is a “partial” list of the member fields, beginning with the most commonly used fields.

<SYSTEM_DATE>	Current Computer Date
<CLUB_NAME>	Club name from Club Info
<NUMBER>	Guest or Member number depending on module
<ADDRESSEE>	Salutation (if there's a value) and Guest/Member Name
<ADDRESS>	Address1 & Address2
<CITY_STATE_ZIP>	City, State Zip
<SEC_ADDRESS>	Secondary address as above
<SEC_CITY_STATE_ZIP>	Secondary City, State Zip as above
<CITY>	City
<STATE>	State
<ZIP_CODE>	Zip Code

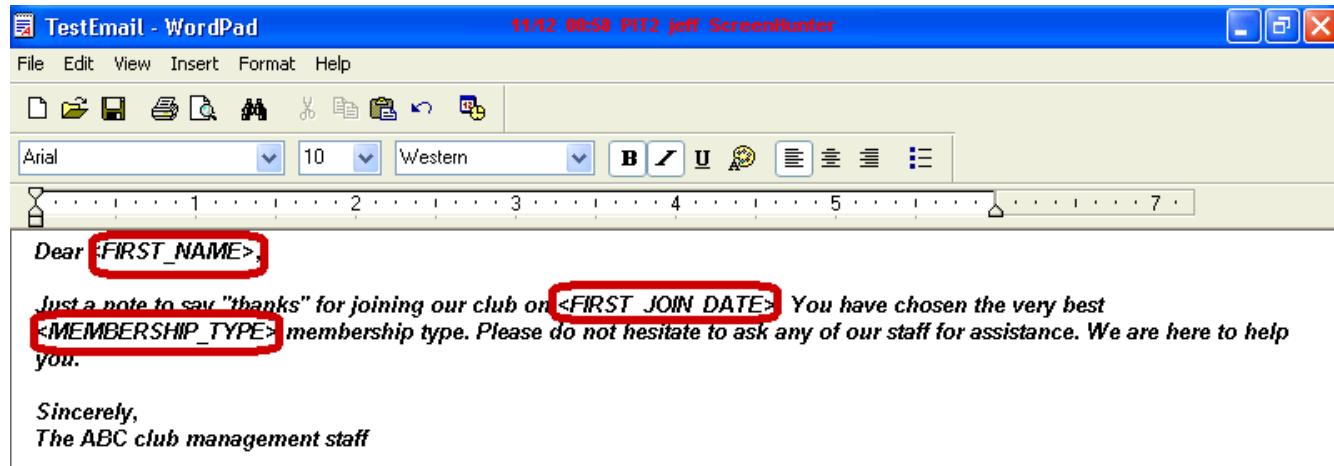
ACCOUNT_NUMBER	The unique account number for member
DOS_CR_NUMBER	
CLUB_CODE	3 letter code.
MEMBER_NUMBER	Membership Number
MEMBER_PHOTO	?
MEMBERSHIP_TYPE	Membership Type (eg Gold,)
MEMBERSHIP_IDNUM	
BARCODE_PREFIX	
BARCODE_NUMBER	Membership Barcode Number assigned
SALUTATION	Mr, Miss, etc
FIRST_NAME	First Name
LAST_NAME	Surname
FIRST_LAST	First name and Last name

ADDRESS_1	Members address line 1
ADDRESS_2	Members address line 2
ADDRESS	Members address line 1 / Members address line 2
CITY	Town / City
STATE	County
ZIP_CODE	Zip Code
CITY_STATE_ZIP	City, State, Zip code
MISC	Prints the Misc box from members
MISC_COMBO	Prints whats in the Members Misc drop down list
SS_NUMBER	Social Security Number
HOME_PHONE	Prints Home phone Number
WORK_PHONE	Prints Work phone Number
CELL_BEEPER	Prints Cell phone / beeber number
E_MAIL_ADDRESS	Prints E-mail address
GENDER	Prints Gender
BIRTHDAY	Prints Birthday Date eg (24/04/1977)
BIRTHDAY_MONTH_INT	Prints Birthday Month (as Number) eg 4
MEMBER_STATUS	Ie None, frozen, Expired
IN_HOLDING_PEN	T or F
MEMBER_COMMENT	Any notes from the members record
SOURCE	Source
REFERRED_BY_PTR	
REFERRED_BY_NAME	Name of member who referred this member
REFERRED_BY_CLUB_CODE	And the referring members club clode?
COMISSION	
COMMISSION_REFUNDED	
LAST_CHANGE_DATE	
INITIAL_PAYMENT_1	Initial payment made
INITIAL_PAYMENT_METHOD_1	By (amex, visa, cash etc)
INITIAL_PAYMENT_2	Split payments ?
INITIAL_PAYMENT_METHOD_2	Split Payments ?
BILLING_CYCLES_ORIGINAL	?
BILLING_CYCLES_REMAINING	Billing cycles to go, (eg 0 to Endless)
ENROLLMENT_FEE	Prints Enrollment fee box
MEMBERSHIP_FEE	Prints Membership fee box
RENEWAL_FEE	Prints Renewal fee box (not future billing amount)

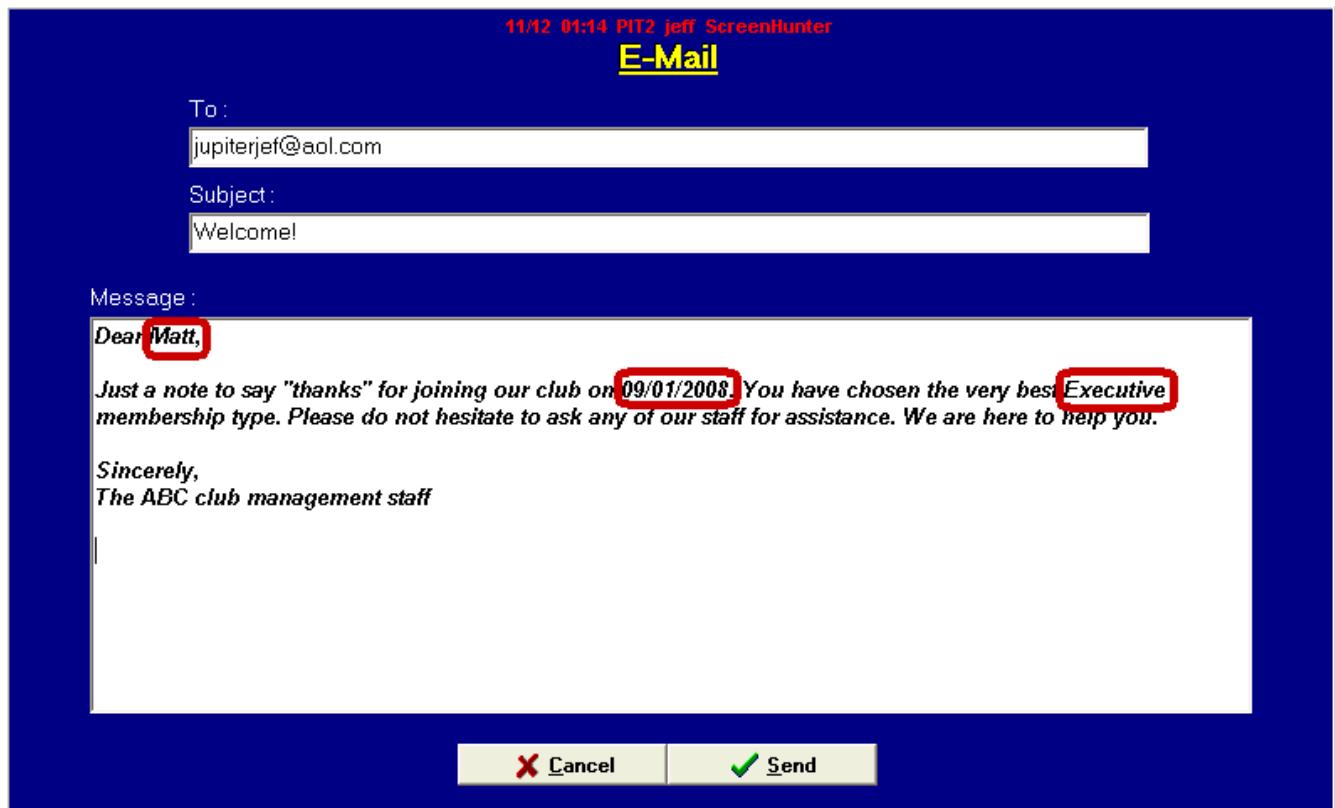
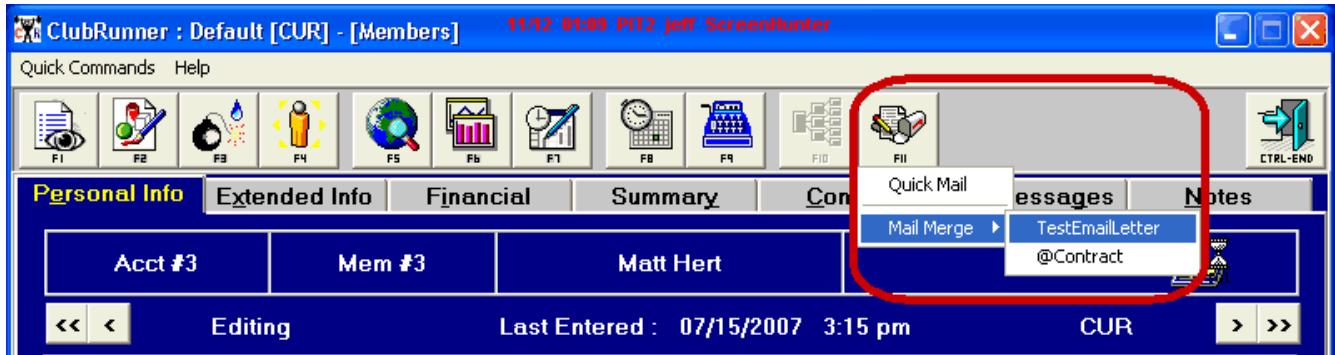
FIRST_MONTHS_DUES	Prints First Months Dues Box
ADDITIONAL_DUES	?
STARTING_MEMBERSHIP_DATE	Prints date membership started
RENEWAL_DATE	Prints renewal date
DENT_ENTRY_ON_DATE	Prints Deny entry on date
DENIED_ENTRY_ON_DATE	Prints date entry was denied
ALLOWED_ENTRY_ON_DATE	?
CANCEL_DATE	
FIRST_JOIN_DATE	Enters the First Joined date
PAST_DUE_DATE	Days past due to pay money
DELETION_DATE	Day record deleted
NEXT_BILLING_FEE	Prints Next Billing Fee from members module
NEXT_BILLING_DATE	Prints Next billing date
NEXT_BILLING_DAY	
NEXT_BILLING_CYCLE	Prints Billing cycle (eg monthly yearly)
RENEWALS	?
PAYMENT_METHOD	How they pay (eg EFT Checking Account)
PAYMENT_METHOD_CHANGE_DATE	When the payment method was last changed (14/30/2000)
CURRENT_BALANCE	Prints the members current balance
PAYMENT_RESPONSIBILITY_NAME	?
PAYMENT_RESPONSIBILITY	This Member / other member dues
PAYMENT_RESPONSIBILITY_PTR	
PAYMENT_RESPONSIBILITY_CC	
CC_NUMBER	
CC_EXP_DATE	
CHECKING_ACCOUNT_NUMBER	EFT Check account Number
ROUTING_NUMBER	Bank ABA Number
SAVINGS_ACCOUNT	F
CREDIT_UNION	F
TRANS_CODE	
CREDIT_LIMIT	Members Credit limit
IN_CLUB	F
ALTERNATE_BILLING_CYCLE	?
ALTERNATE_BILLING_DATE	?
ALTERNATE_BILLING_FEE	?
ALTERNATE_STOP_BILLING	F

NEXT_BILLING_CONTINUE	F
FREEZE_STARTING_DATE	Prints Freeze start dates
FREEZE_ENDING_DATE	Prints Freeze end date
FREEZE_MONTHS	?
FREEZE_DAYS	?
FREEZE_FEE	Freeze fee
FREEZES	?
LAST_ENTERED_DATE_TIME	Prints Last entered date and time
ECM	Entries on Current Membership
ENTRIES_ALLOWED	Entries allowed
ENTRIES_TO_DATE	Entries to date
LENGTH_OF_MEMBERSHIP	Membership length (eg Endless, 1 Year)
GUEST_PASSES_OA	Guest Passes made available
GUEST_PASSES_USED	Guest passes used
CC_CHANGE_DATE	
CHECKING_CHANGE_DATE	Date EFT details changed
RETURN_CODE	EFT
RETURN_REASON	EFT
RETURN_DATE	EFT
LAST_AUTO_ADD_FREEZE_DATE	?
LAST_STATEMENT_DATE	?
CASH_OUT	?
FUTURE_BILLING_AMOUNT	Next Months dues
CURRENT_MONTHS	?
LOCKER_FEE	Prints the cost charged for locker
LOCKER_EXP_DATE	Prints locker expiration date
LOCKER_NUMBER	Prints locker number
TOWEL_DATE	
AUDDIS_CODE	

Here's what our example letter looks like...



When you e-mail merge the letter in members, the result is...



Click the "Send" button, and you'll see...



E-Mailing a Member's Statement



The screenshot shows a "Print Preview" window titled "R Print Preview" with the identifier "1112 01:44 PIT2 jeff ScreenHunter". The toolbar includes "Print" and "E-Mail" buttons, with the "E-Mail" button circled in red. The main content is a member statement for Matt Hert. It includes fields for "Statement Date" (11/12/2008), "Member Number" (3), and a "Please Fill In Total Amount Paid" field. Payment method checkboxes for "CREDIT CARD", "CHECK", and "MONEY ORDER" are shown. Below that, there are fields for "CARD#" and "EXP DATE". The "Statement Period" is listed as 11/12/2001 - 11/12/2008, and the "Member ID" is CURAAMBRs-2147483387. A "SIGNATURE" line is present. At the bottom, a transaction history table is displayed:

DATE	RCPT #	CHECK #	DESCRIPTION	CHARGES	CREDITS	BALANCE
			Beginning Balance			\$0.00
5/15/2007	31529		1 PT 10 Sessions 1 Hour	\$570.00	(\$570.00)	\$0.00
5/15/2007	31531		1 PT 10 Sessions 1 Hour	\$0.00	\$0.00	\$0.00
			Entry Used : Consultant [Jeff] 9/10 entries remaining			
6/15/2007	31533		1 PT 10 Sessions 1 Hour	\$0.00	\$0.00	\$0.00
			Entry Used : Consultant [Jeff] 8/10 entries remaining			
7/15/2007	31535		1 PT 10 Sessions 1 Hour	\$0.00	\$0.00	\$0.00
			Entry Used : Consultant [Jeff] 7/10 entries remaining			
8/20/2007	31536		1 PT 10 Sessions 1 Hour	\$100.00	\$100.00	\$0.00

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R Print Preview 11/12 01:46 PIT2 jeff ScreenHunter

Print E-Mail 93 % 1 Close

Current Users Database
1080 East Indiantown Road
Jupiter, FL 33477

Statement Date 11/12/2008
Member Number 3

E-Mail Progress

MATT HERT
1343 GARDEN RD / 123 MAIN STREET
FT.LAUDERDALE, FL 33326

Statement Period: 11/12/2001 - 11/12/2008
Member ID: CURAAMBR5-2147483387

DATE	RCPT #	CHECK #	DESCRIPTION	BALANCE
			Beginning	\$0.00
5/15/2007	31529		1 PT 10	\$0.00
5/15/2007	31531		1 PT 10	\$0.00
			Entry Used	
6/15/2007	31533		1 PT 10	\$0.00
			Entry Used	
7/15/2007	31535		1 PT 10	\$0.00
			Entry Used	
8/20/2007	31536		4 PT 10	\$0.00

Page 1 of 5

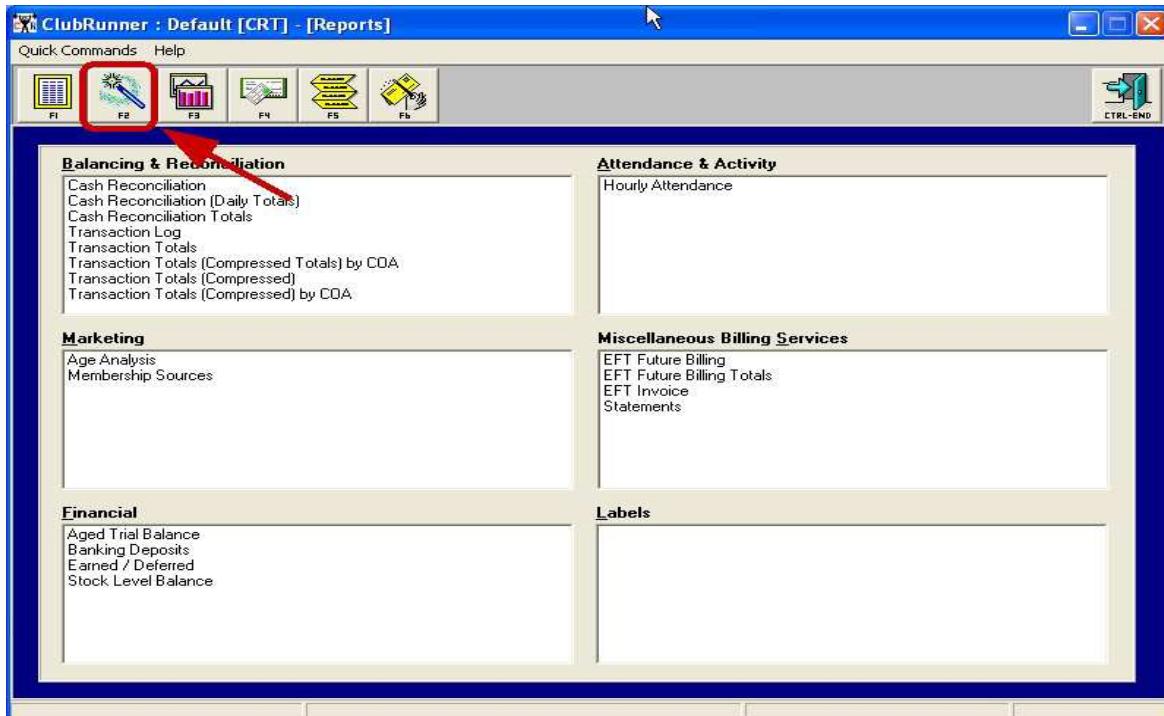
Initializing e-mail...
Connecting to server : mail.bellsouth.net...
Preparing to send...
Sending e-mail (1 of 1)...
Send complete!

Mass E-Mailing

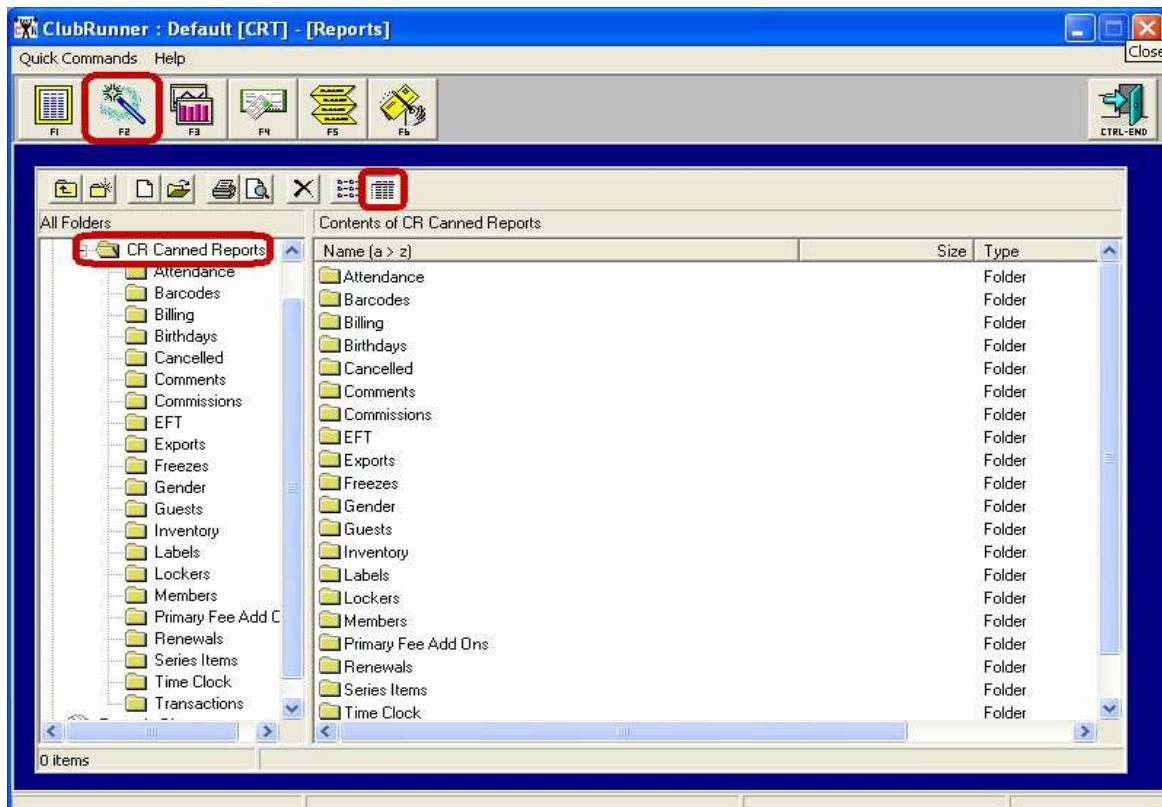
The “results” of any report run in Clubrunner (i.e., those members or guests selected by the report) can be mass e-mailed. First, you have to run the report slightly differently than you would normally. For our example, we will e-mail to all of our members who joined the club this year. ***Keep in mind that this is an example, and, there are no restrictions to mass e-mailing, as long as those members or guests are in the results of the report you have run...***

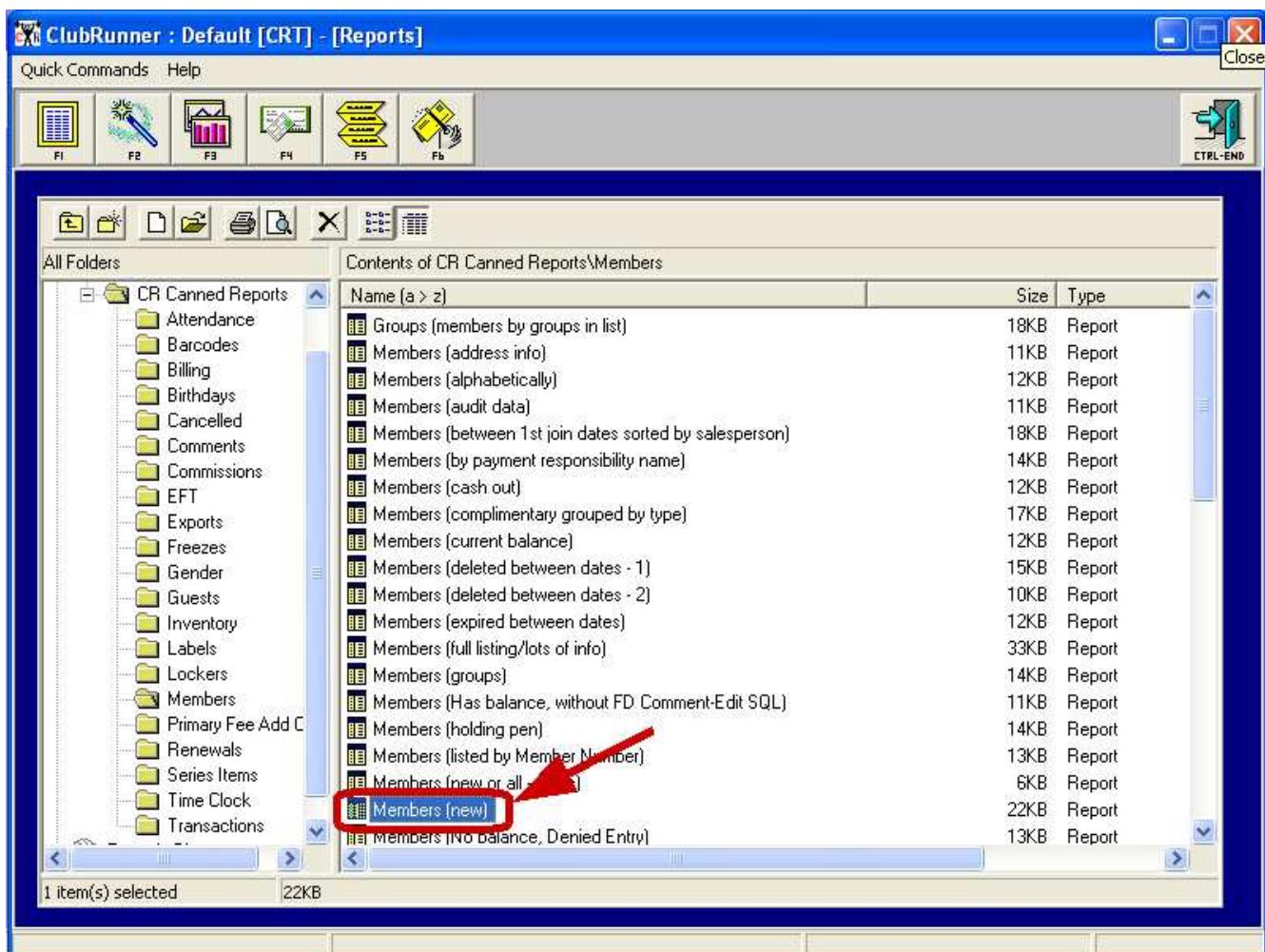


After entering in to reports, go to your reports, the “F2 Wizard Wand”...

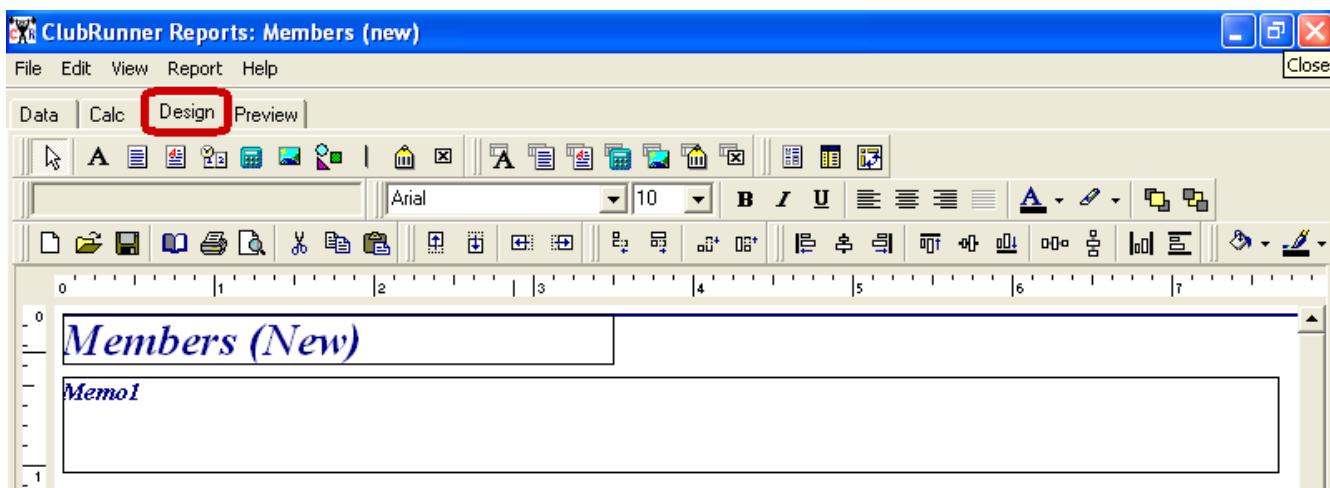


For our example, we'll use a “Canned Report”...

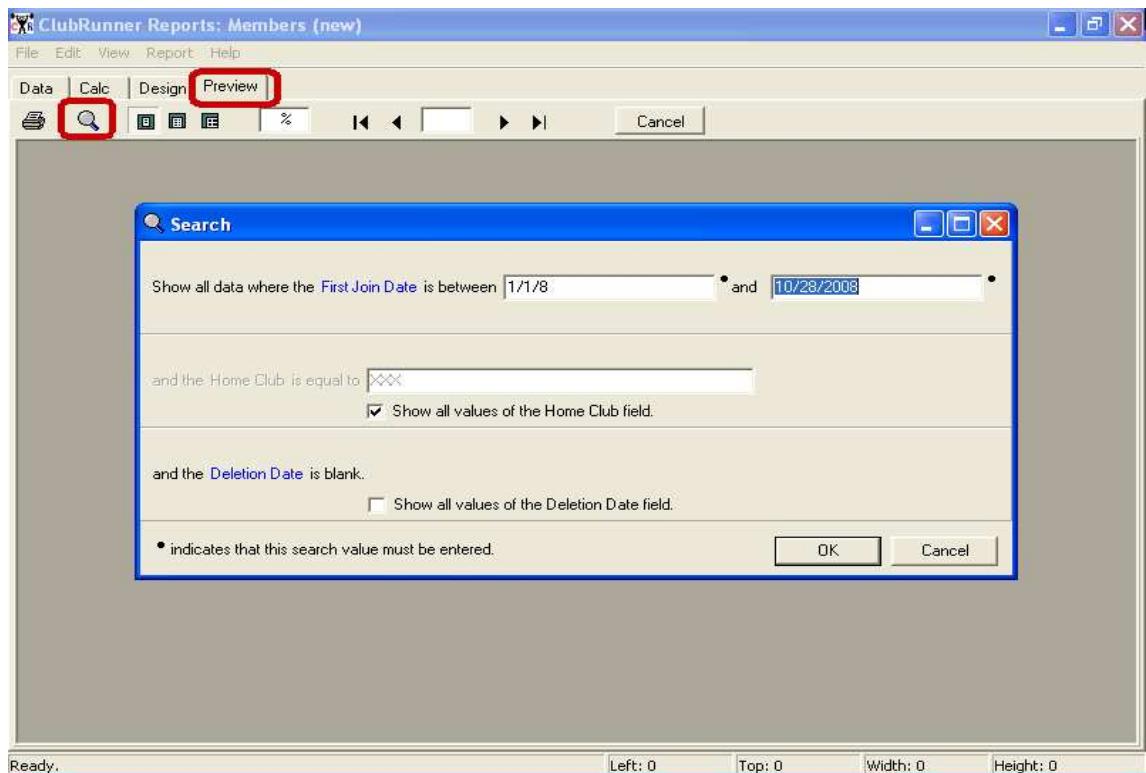




Rather than “run” report, we’ll “open” it up by double clicking the report “icon” to the left of the name of the report. That takes us to the “Design” tab of the report...



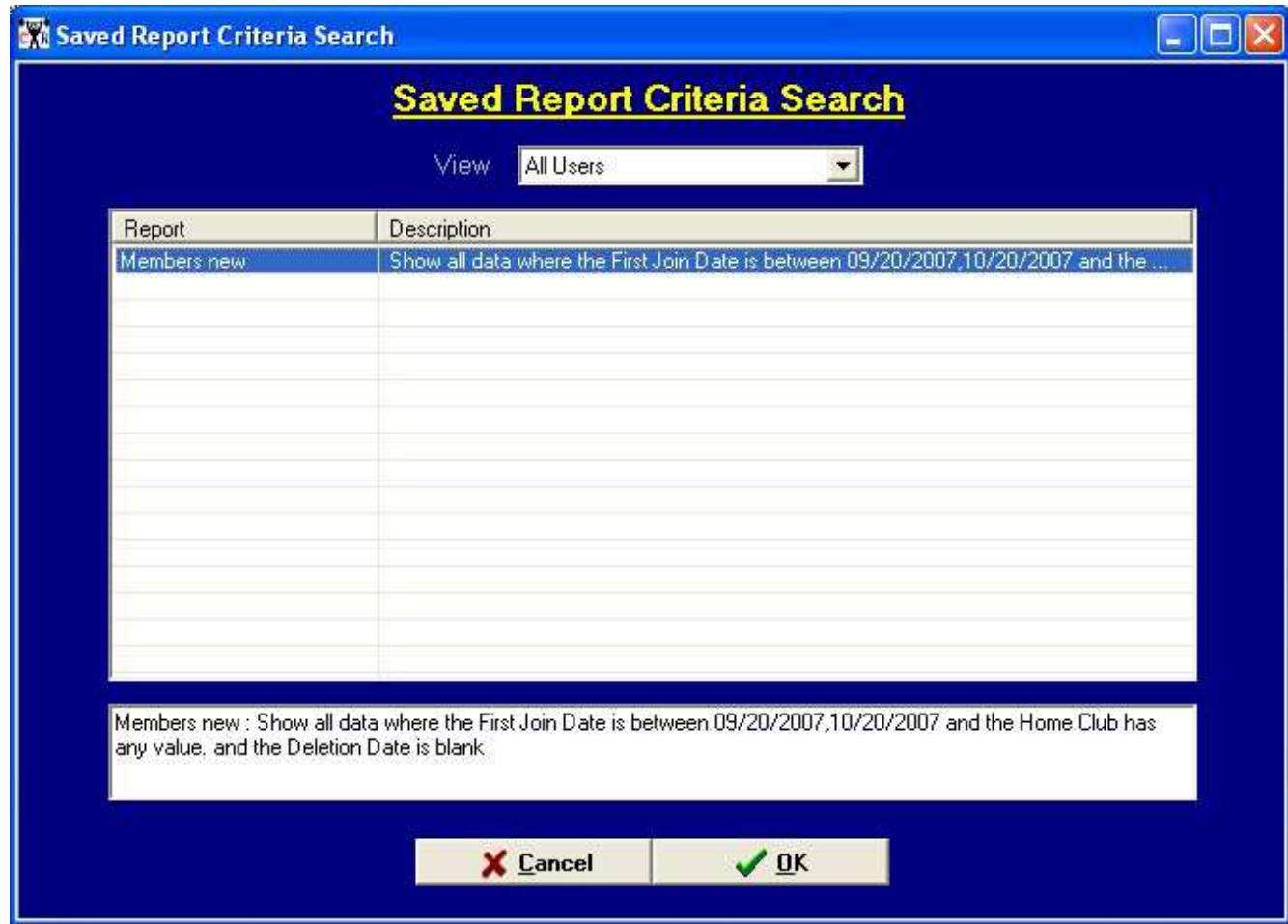
Now we'll go to the “Preview” tab and run the report...



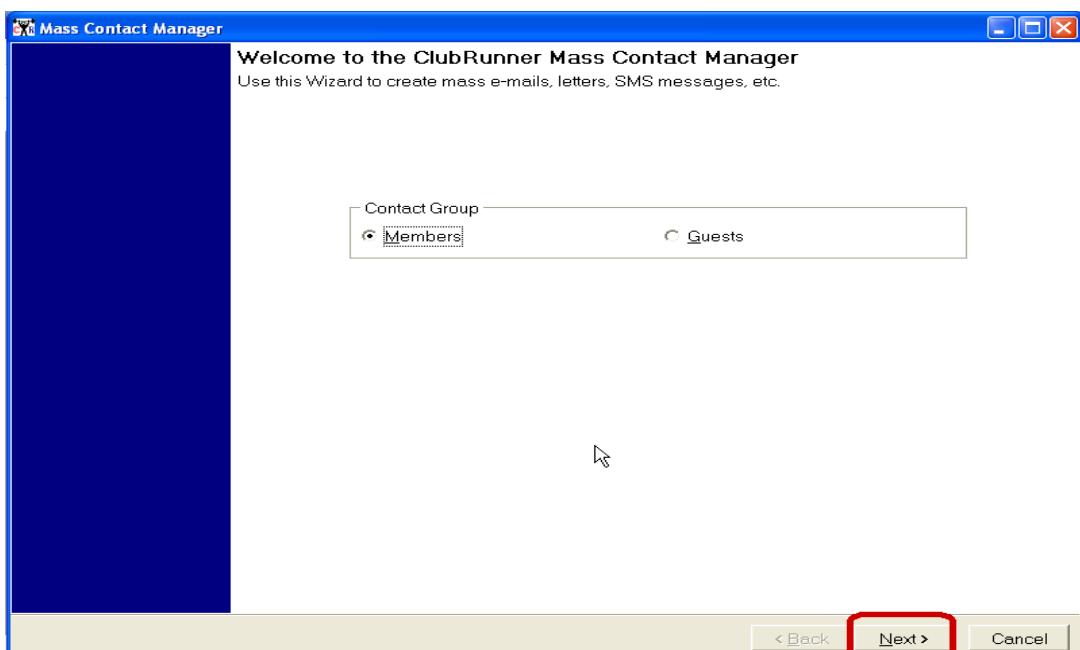
After getting the results, you want to click on the “ClubRunner” menu and select “Save to Member Search”...

Number	Type	Name	Join/Adn	Pro Rata	Payment Method	Bill Date	Bill Fee	Init
10/02/07								
1131	Member	Carl Kah	\$0.00	\$0.00	Not Available		\$0.00	
1131	Member	Shirley Kah	\$0.00	\$0.00	Not Available		\$0.00	
Total 2			\$0.00	\$0.00			\$0.00	
10/10/07								
1200	Member	Jane M. Perkins	\$0.00	\$0.00	Statements	03/01/08	\$0.00	
Total 1			\$0.00	\$0.00			\$0.00	
10/11/07								
1010	Member	Edward Stone	\$0.00	\$0.00	Not Available		\$0.00	
1010	Member	Lollie Stone	\$0.00	\$0.00	Not Available		\$0.00	
Total 2			\$0.00	\$0.00			\$0.00	

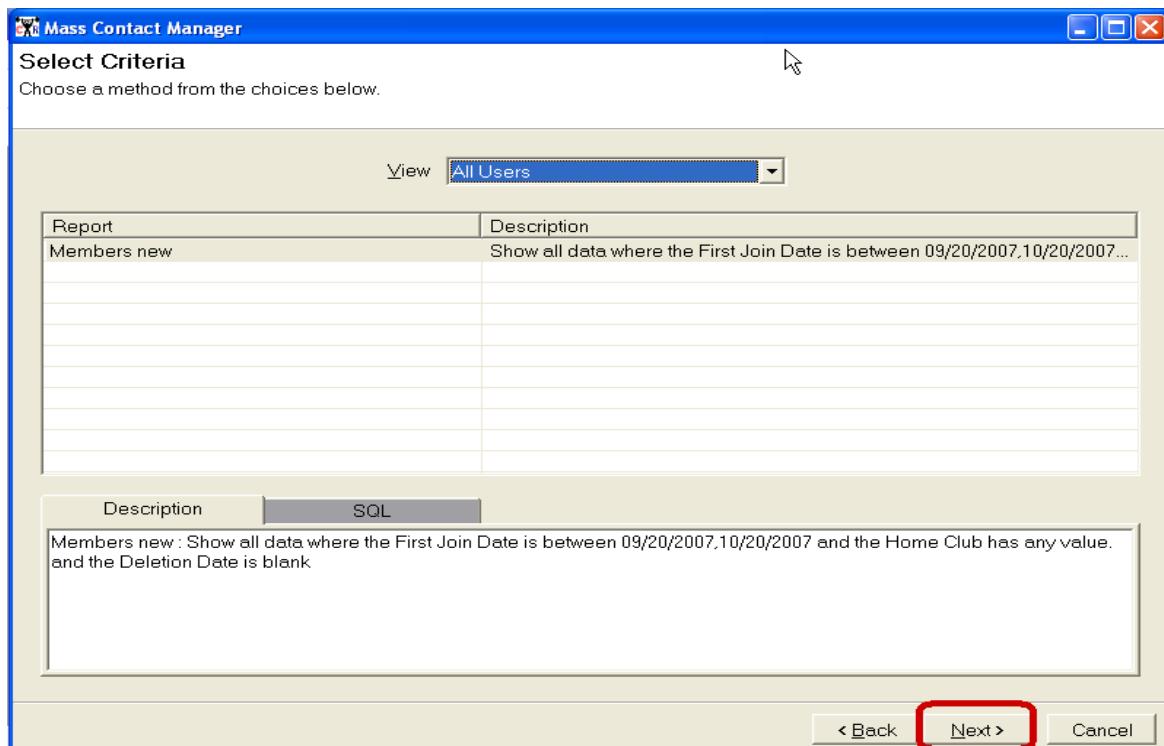
Then save the report results...



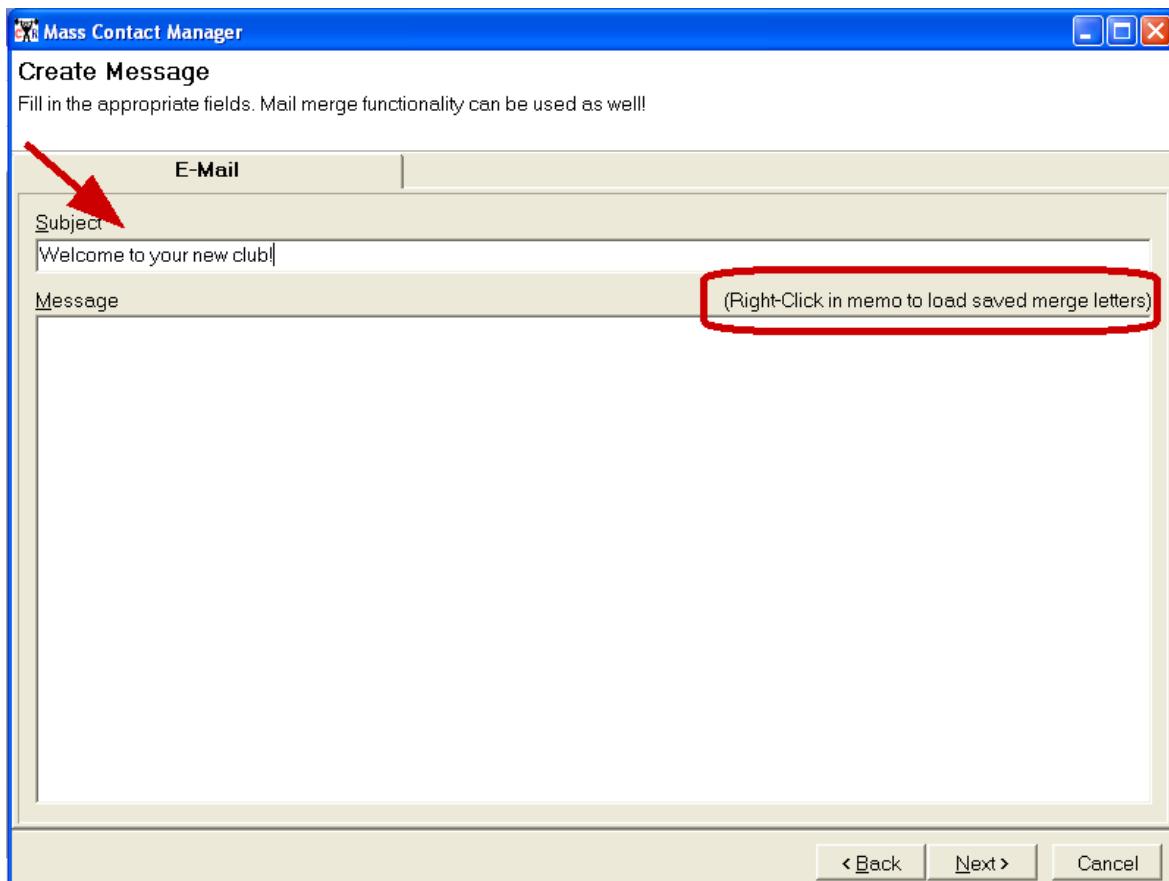
Now the “results” of the report are saved, and can be used for many purposes, including mass e-mailing... To open up the Mass Contact Wizard, drop down the Quick Commands Menu and select “Mass Contact Wizard”. The wizard will launch and you are on your way...

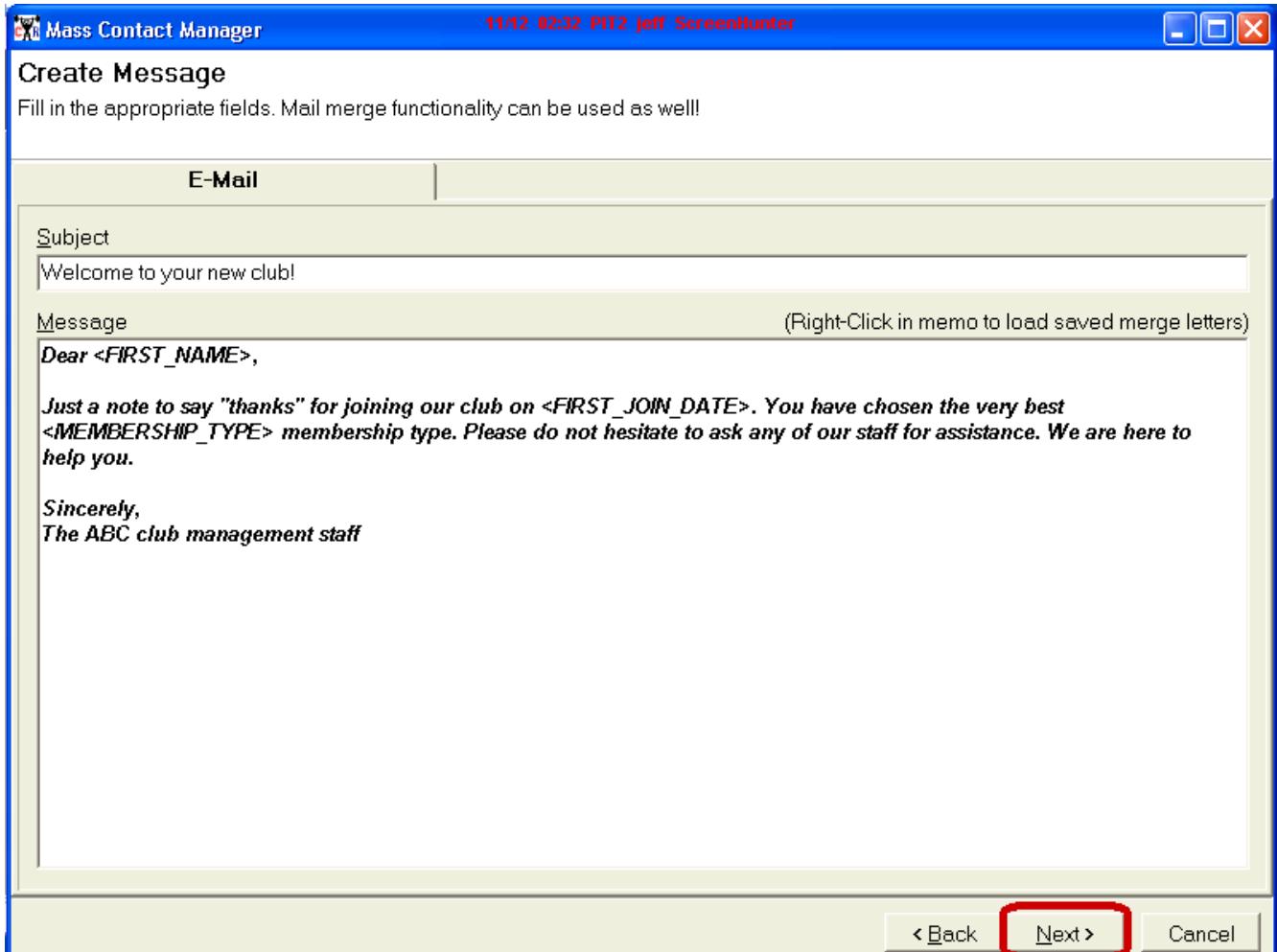


Select the report that you want to use for the mass e-mail...

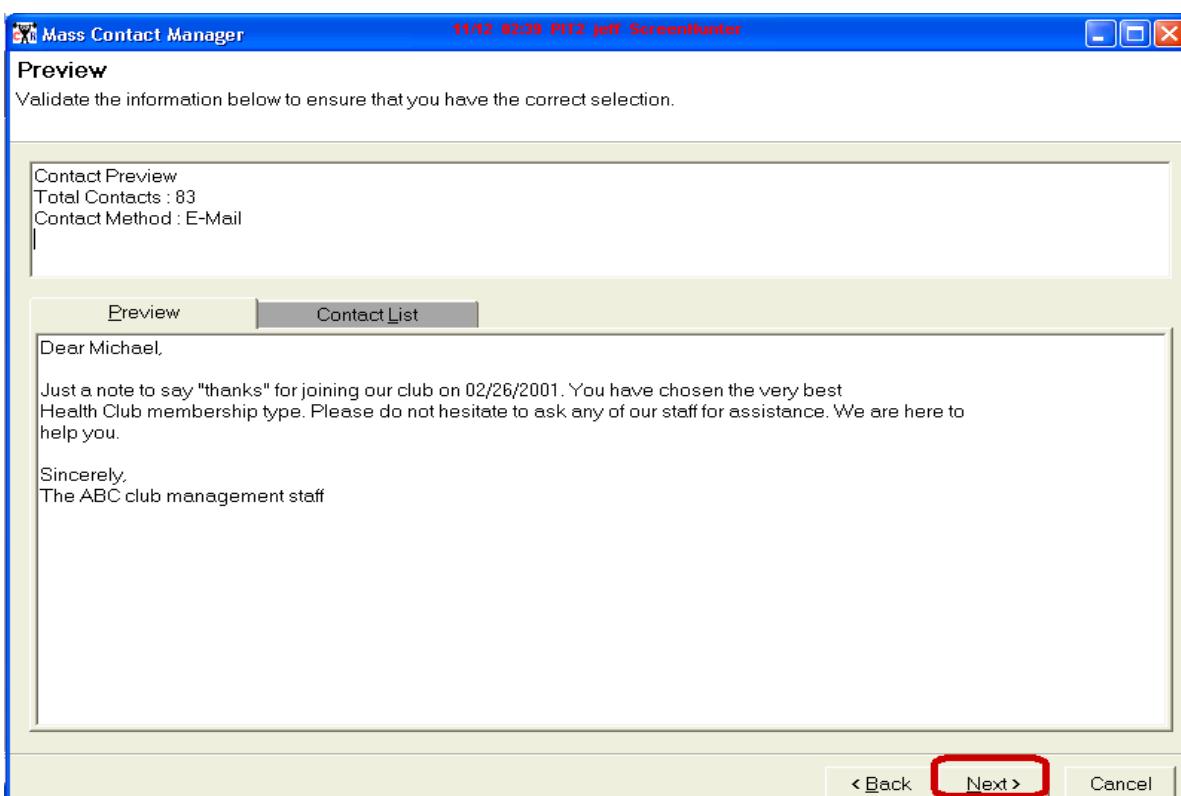


Put in your “subject” line, and, either type your e-mail letter in or load in a previously saved letter...

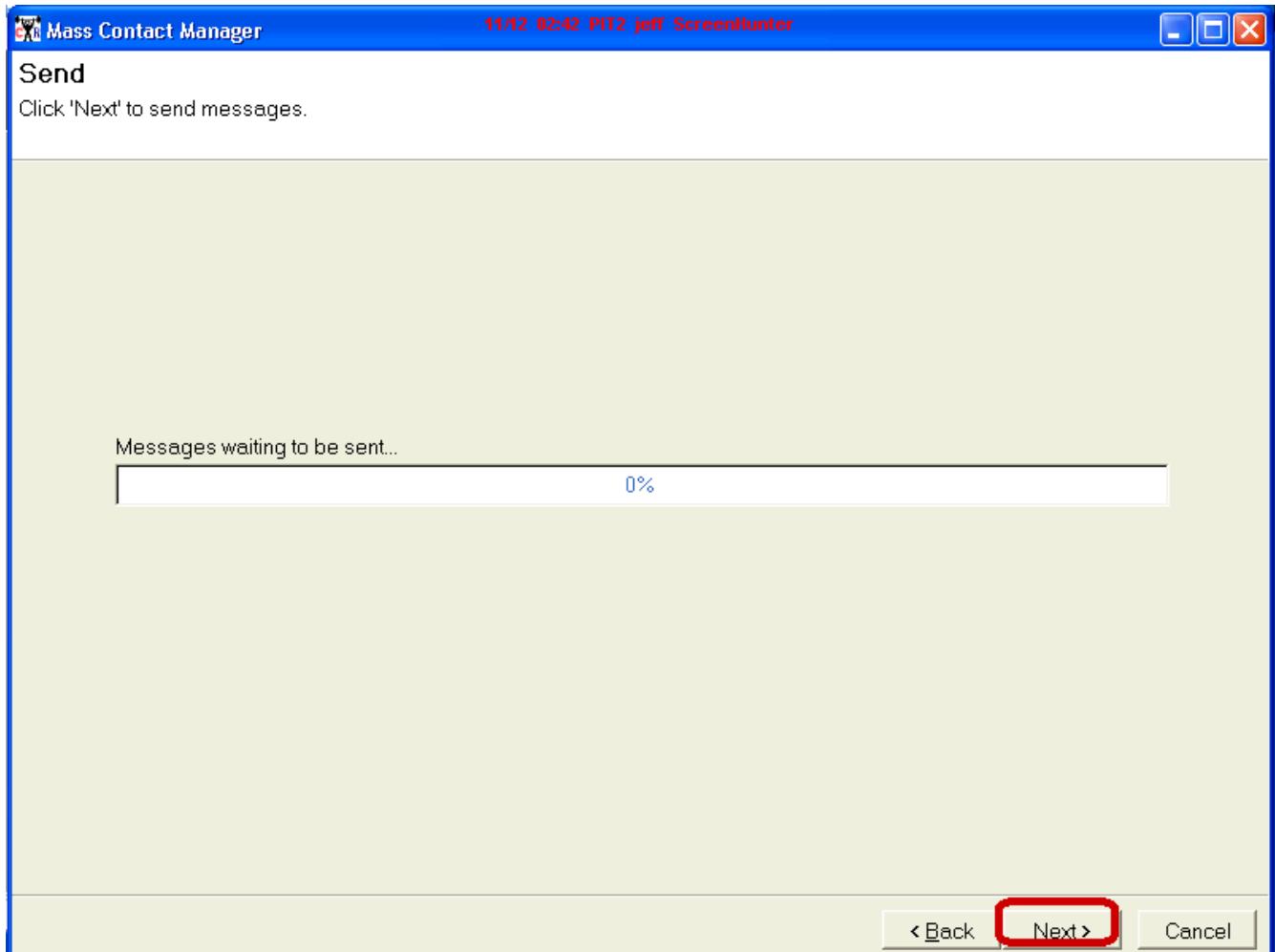




Complete the merge...



Send off the e-mail...



A Few things to Note:

- E-Mailing from ClubRunner is an “outbound” system. All sent emails will come from the email address that ClubRunner was configured with. All returned emails will go to that same address.
- ClubRunner will display an on screen log of emails rejected due to incorrect formatting. Examples are:
[“Jupiterjef@Aool.com”](mailto:Jupiterjef@Aool.com) (Aool.com should be Aol.com)
“JupiterjefAol.com” (missing the “@” sign)
- Emails that are properly formatted but instead do not exist will be returned to the sender's email address.

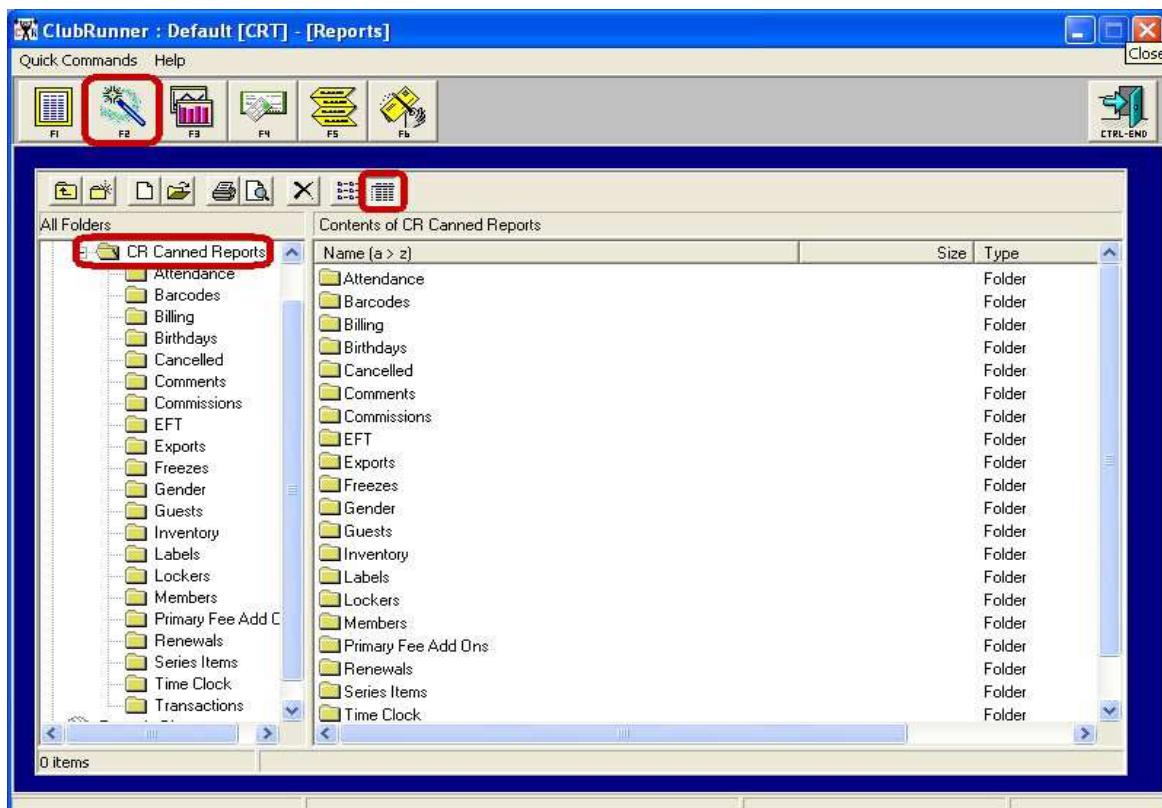
Mass emails run the risk of being evaluated by Internet Servers as “spam” or “junk” emails. Depending on the size of your email and the speed of your internet connection, you could send out hundred's of emails in a minute to a particular ISP (internet service provider), who's software may interpret these as “spam” or “junk” mail. Typically, this is not a problem, and, if it is there are “work around” solutions.

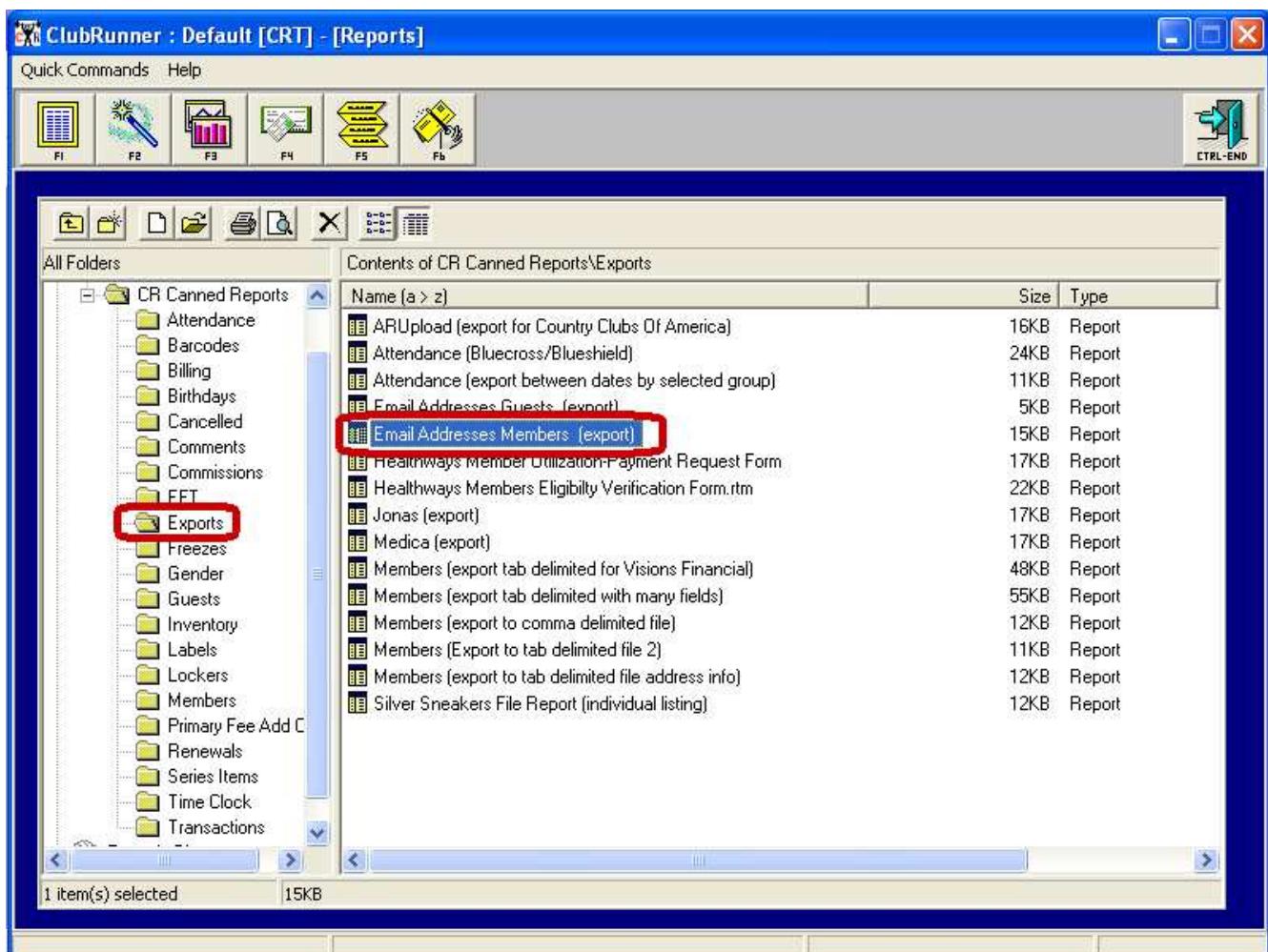
Using ClubRunner with Word and Outlook to Email

Most of us have used Microsoft Word and Outlook at various times. All versions of Word and Outlook created from 2003 to present, support the creation of a “graphical” email as well as the mass email merge through Outlook. You cannot use Outlook Express, only Outlook! Also, **Outlook must be the default mail program on your computer**. Here's a quick run through...

Run your report in ClubRunner and export the results in to Word...

For this example, we'll run a report in your ‘F2 Wizard Wand’, CR Canned reports / Export folder named “**Email Addresses Members (export)**”...





When you run this report, you'll have many "spin" offs to choose from. Depending upon what options you decide to activate, this report could give results for: Members with a birthday in a particular month, Members whose credit card is expiring soon, Members who have a current balance, Members who are due to renew soon, etc, etc...The report will only yield results for those members with a value in their email field. ClubRunner cannot check the validity of a member's email address, just the fact that the member has some value in that field. For our example, I have run the report to get me everyone who has a birthday in December. I'll then compose a letter / email letter to send them...

Search

Show all data where the **Deny Entry On Date** is between * and *

and the **Birthday Month (#)** is equal to

Show all values of the Birthday Month (#) field.

and the **Credit Card Expiration Date** is between and

Show all values of the Credit Card Expiration Date field.

and the **Current Balance** is greater than or equal to

Show all values of the Current Balance field.

and the **Renewal Date** is between and

Show all values of the Renewal Date field.

and the **Last Entered Date** is between and

Show all values of the Last Entered Date field.

and the **Email Address** is greater than or equal to

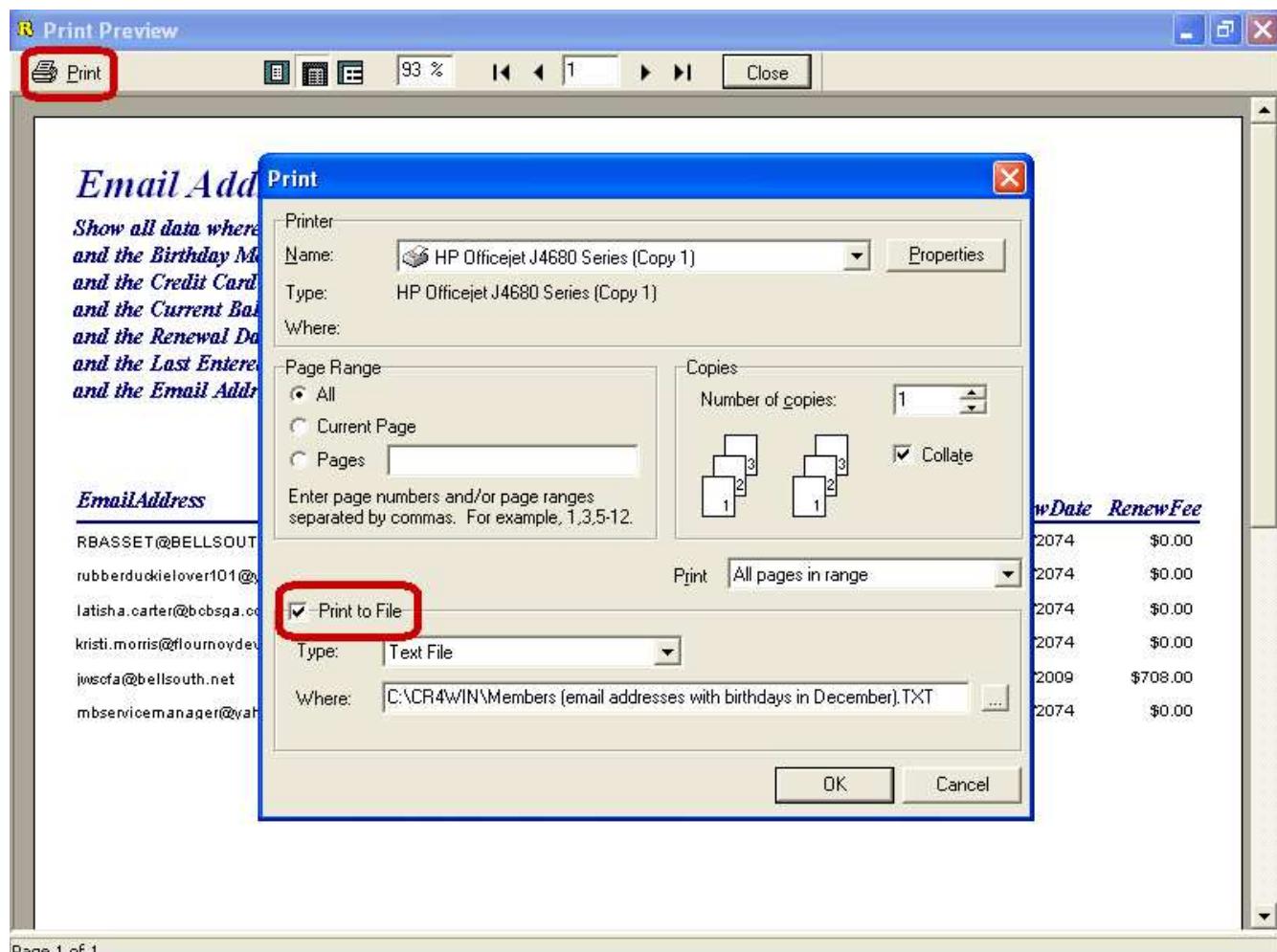
* indicates that this search value must be entered.

Email Addresses Members

Show all data where the Deny Entry On Date is between 1/1/7, 01/01/2075
and the Birthday Month (#) is equal to 12
and the Credit Card Expiration Date has any value.
and the Current Balance has any value.
and the Renewal Date has any value.
and the Last Entered Date has any value.
and the Email Address is greater than or equal to .

EmailAddress	FirstName	LastName	Balance	Birthday	CCExpDate	RenewDate	RenewFee
RBASSET@BELLSOUTH.NET	Becky	Basset	\$44.00	December 15		11/18/2074	\$0.00
rubberduckielover101@yahoo.com	Courtney	Brennanan	\$10.00	December 16	12/30/1899	11/18/2074	\$0.00
latisha.carter@bcbsga.com	Latisha	Carter	\$0.00	December 8		11/18/2074	\$0.00
kristi.morris@flournoydev.com	Flournoy	Company	\$0.00	December 30		11/18/2074	\$0.00
jwesofa@bellsouth.net	Joe	Smith	\$15.00	December 13		06/16/2009	\$708.00
mbservicemanager@yahoo.com	Sean	Smith	\$0.00	December 24		11/18/2074	\$0.00

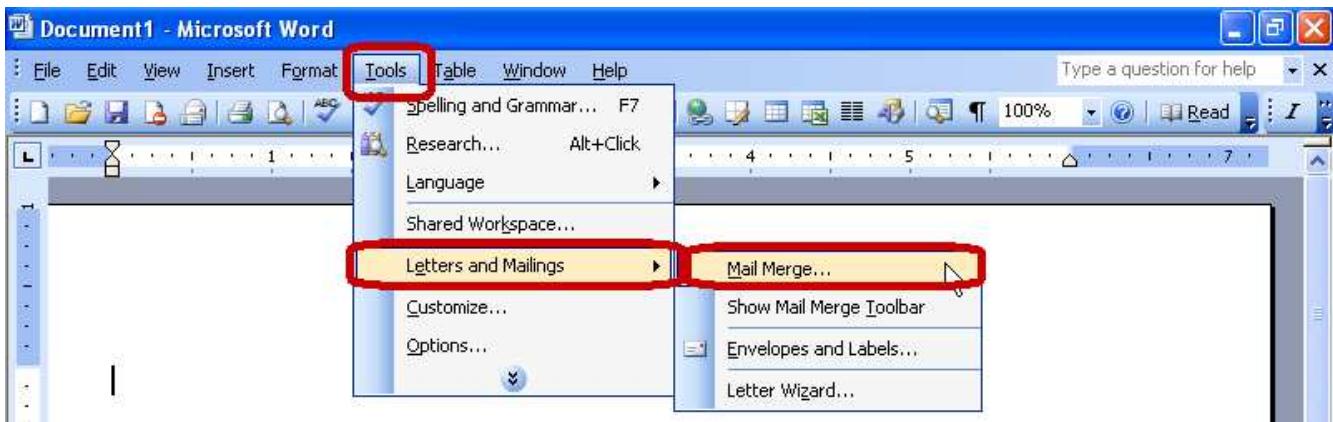
Now, we are ready to “print” the report. However, we’ll need to “print” the report to a file (rather than paper) so that Word can import the information in to the email letter there...



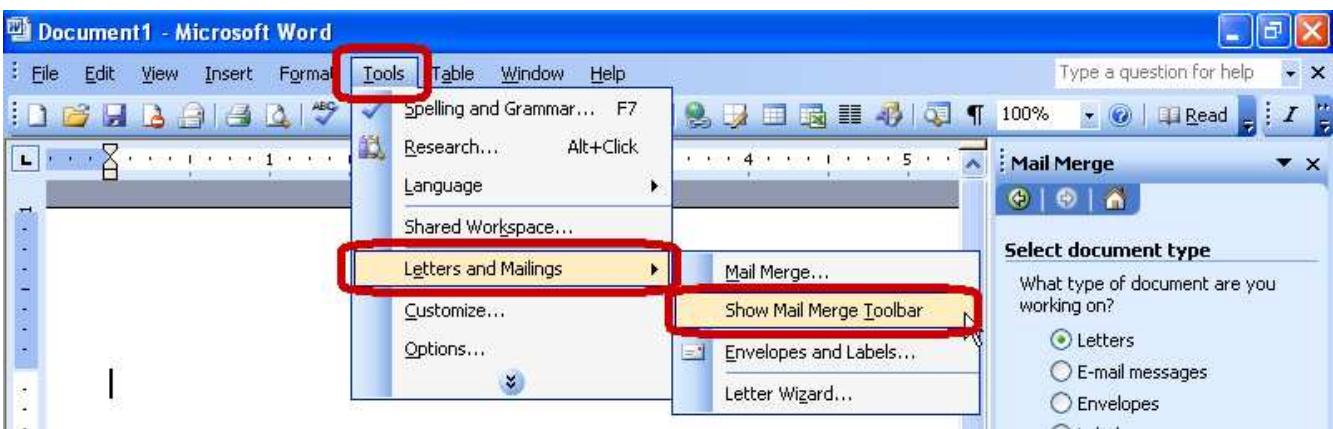
We recommend that you name the file appropriately, so that you know exactly what members are contained in it. We named our file “Members (email addresses with birthdays in December).txt”. Also, you should save these files to a folder that will contain all your export files.

Importing the results in to Word

Open Word (any version from 2003 on will suffice). For our example, we'll use Word 2003. Newer versions of Word work the same, but have slightly different interfaces. If you have newer version, Word's help will tell you how to navigate through the “merge”.



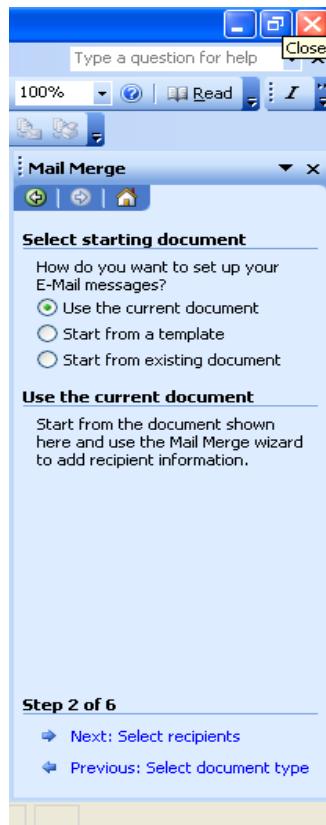
We would also recommend that you “Show Mail Merge Toolbar”...



The right side of the screen shows you the Mail Merge Wizard. The default merge is a letter, so we want to change that to an “E-mail message” and click “next”.....

Next, you have to decide whether you want to use the current document, an existing template or an existing document (a previously created letter). We'll use the current document, and, click “next”...

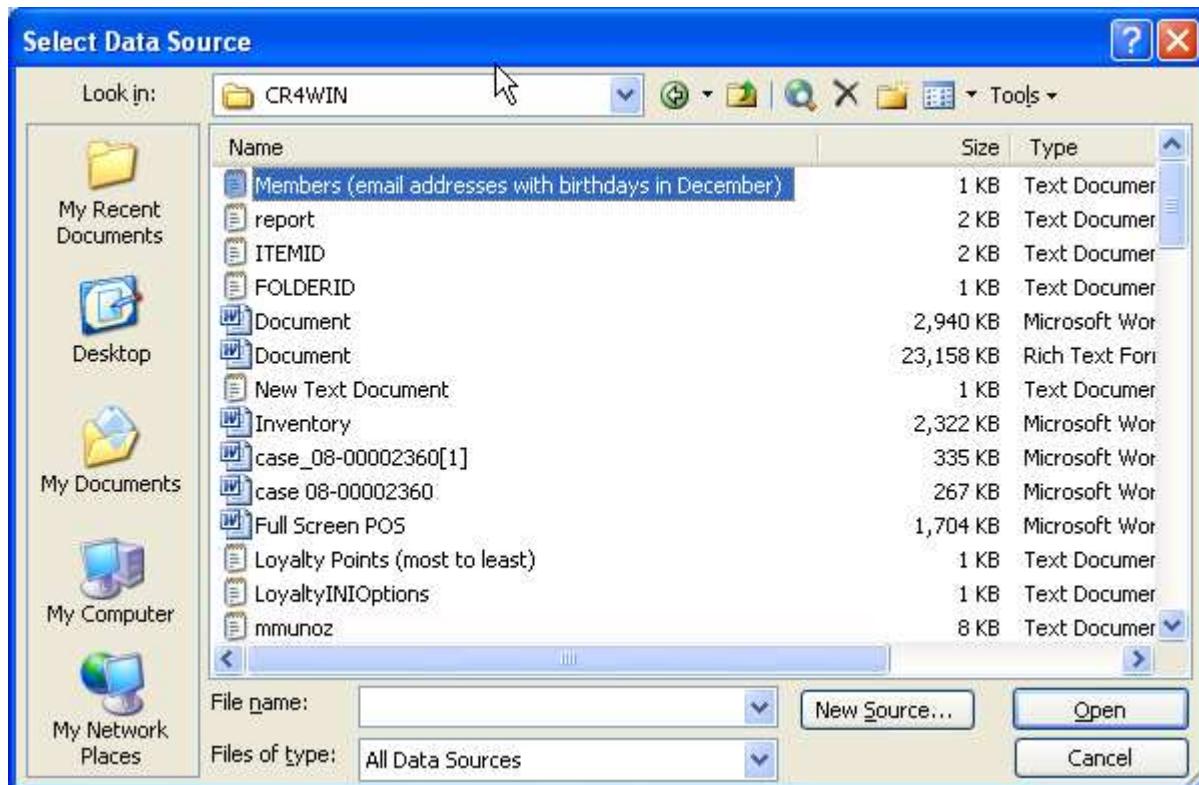




Time to get our “list” from ClubRunner, which, we'll “browse” for...



Select our data file to import...

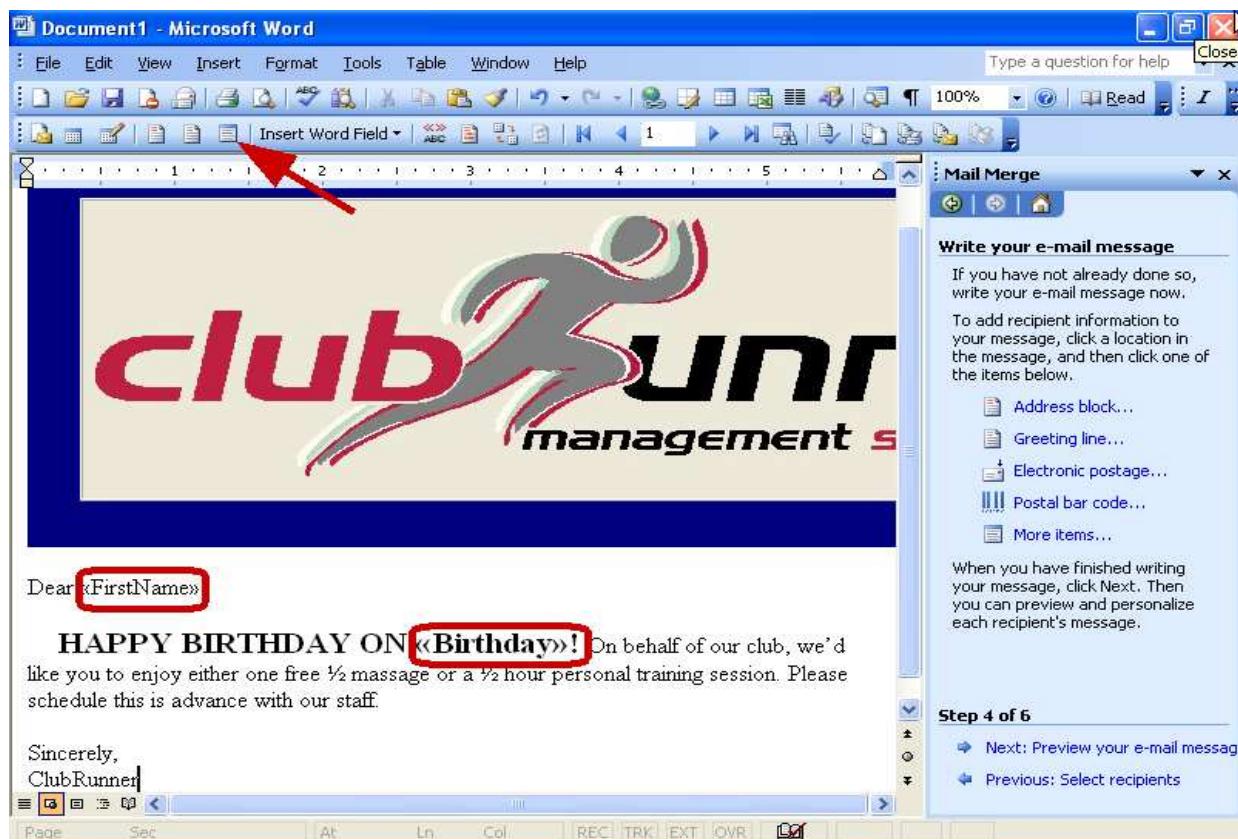


Word imports the file in to an “editable” grid. You can edit any field, however, those changes are not transferred back in to ClubRunner. They are only in effect for this merge. Also, you can select some members from all the members.

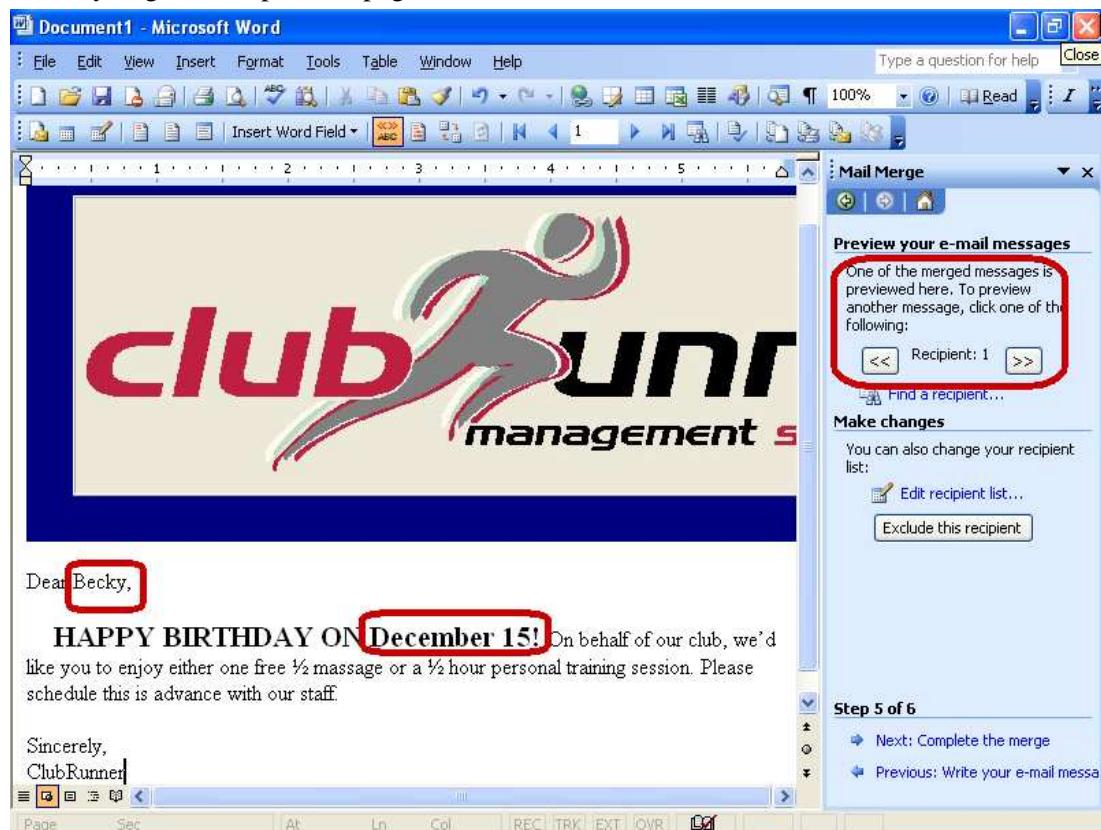
The screenshot shows Microsoft Word with the 'Mail Merge' feature open. The 'Mail Merge Recipients' dialog box is in the foreground, displaying a list of recipients with columns for LastName, FirstName, EmailAddress, Balance, and Birthday. Several rows are selected, indicated by blue checkmarks in the first column. The 'Select All' button is at the bottom left, and 'OK' is at the bottom right. To the right of the dialog box is the 'Mail Merge' task pane, which includes sections for 'Select recipients' (with radio buttons for 'Use an existing list', 'Select from Outlook contacts', and 'Type a new list'), 'Use an existing list' (showing 'Currently, your recipients are selected from: [:\CR4WIN\Members (email addresses)]'), and 'Step 3 of 6' (with links for 'Next: Write your e-mail message' and 'Previous: Starting document').

Last Name	First Name	Email Address	Balance	Birthday
Basset	Becky	RBASET@BELLSO...	\$44.00	December 15
Brenneman	Courtney	rubberduckielover1...	\$10.00	December 16
Carter	Latisha	latisha.carter@bcbs...	\$0.00	December 8
Company	Flournoy	kristi.morris@flourn...	\$0.00	December 30
Smith	Joe	jwscfa@bellsouth.net	\$15.00	December 13
Smith	Sean	mbservicemanager...	\$0.00	December 24

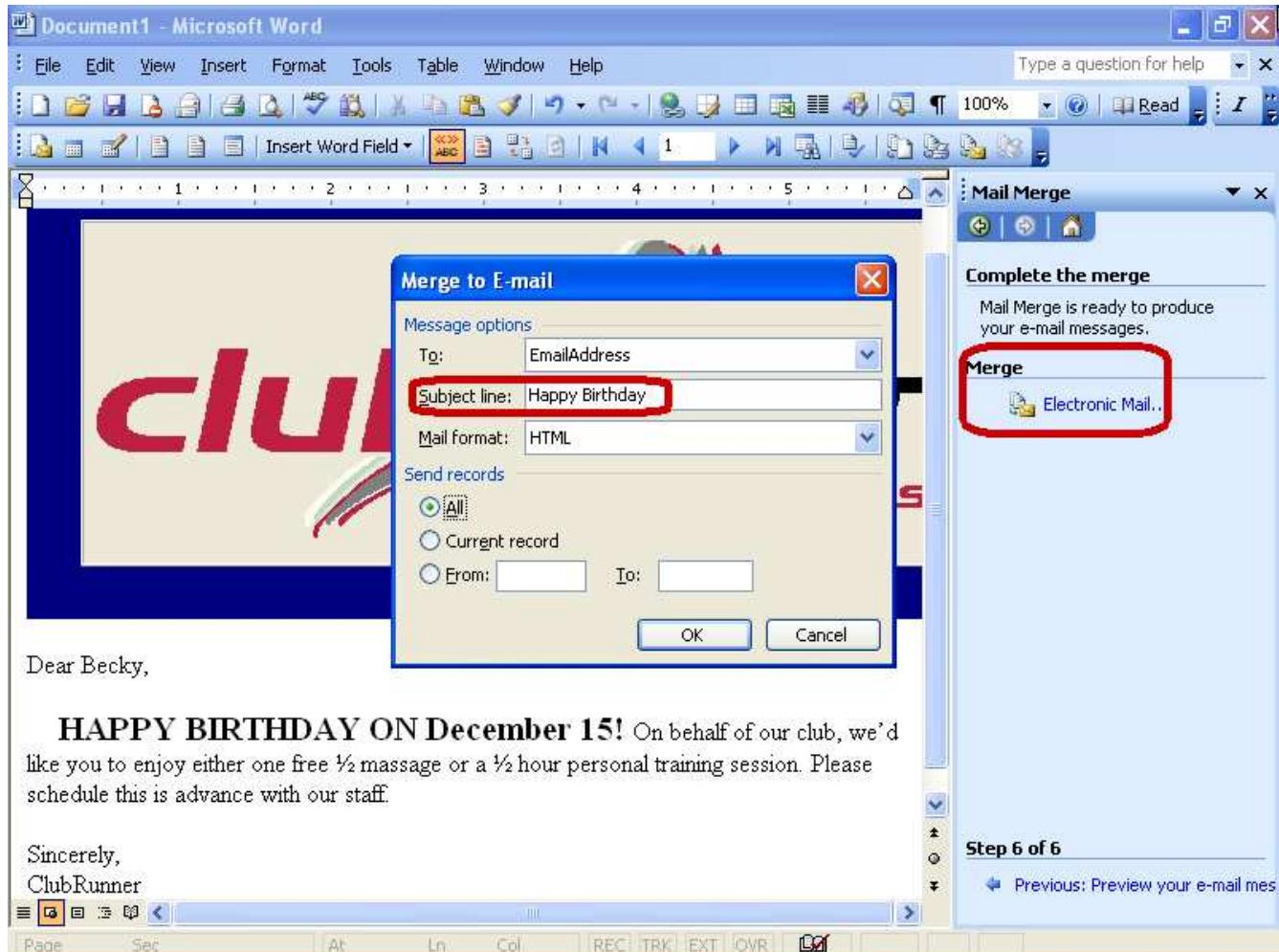
Now, we can compose our birthday letter. Remember, you can also use a previously written letter. These letters can contain any graphics and specialized fonts, allowing you to make them look quite appealing...



We've used the “insert mail merge field” tool to substitute in our member's first name and their birthday. By clicking “next”, you get to the preview page where Word substitutes in values for these fields...



The last step completes the merge...All you have to do is complete the “subject line” of the email...



Clicking "OK" begins the sending of the email. **Remember, Word will only work with Outlook as your default mail server.** Have fun.

