

Welcome to ClubRunner!



As a new subscriber to the ClubRunner community, we want you to get the most out of your evaluation and have created this guide to help you setup, launch and maintain your ClubRunner site successfully.

This guide is intended to serve as a checklist of all the steps needed to ensure you have completed everything to get started. If at any time you encounter any difficulties or technical problems while trying ClubRunner, please e-mail our Support Team at support@clubrunner.ca, or call us at 1-877-469-2582. You can find the latest copy of this and other guides within the Downloads section of our Support Center at www.ClubRunnerSupport.com.

Logging In

To get started, please refer to the Welcome Email you received from us with details of your website. Your temporary website address is usually in the portal.clubrunner.ca/clubname. In order to retrieve your password, go to the "Login" link at the top of your website, then click on the "New and Existing Users – Retrieve Login Password" link. Simply follow the instructions on the screen to setup your password. Please note, that the last name and e-mail address you provide must match what is on record for security purposes. If you are unable to get your password, please email logins@clubrunner.ca with your name and club and it will be emailed to you. Please click [here](#) for more information.

A screenshot of the ClubRunner login form. It features a title "Enter your login information below:" and two input fields for "Login Name" and "Password". There is a checkbox for "Keep me logged in" and a blue "Login »" button. At the bottom, a red oval highlights the text "New and existing users: retrieve login and/or reset password".A screenshot of the "Retrieve Login Information" form. It features a title "Retrieve Login Information" and a message: "Please enter your last name and email address to retrieve your login name and/or reset your password." Below this is a legend: "* Denotes a required field." There are two input fields: "Last Name:" and "Email Address:". The "Email Address:" field has a red asterisk to its right. At the bottom, there are "Submit" and "Cancel" buttons.

With your login information, you can now log into your website and you will be directed to the Admin page. This is a member's only page where you will be able to change your login information and be able to update content to your site.

For future reference, write your login information here:

Login Name	
Password:	

Club Information & Settings

Check that your executives and directors are listed properly, as well as your committee listings. This will populate your homepage as well as be key to receiving communications.

- ✓ **Define Your Executives & Directors:** Check your listing of executives and directors to ensure accuracy. To access and update this list, go to the "Edit Executives & Directors" link from the Admin page. For detailed instructions on how to manage your executive listing, see this help page:

<https://www.clubrunnersupport.com/article/1059-how-do-i-add-a-club-executive>

- ✓ **Check Club Meeting Info & Settings** Ensure that you have the correct meeting time, day and location in your club settings. This information is reflected on your meeting info widget on the homepage, and will also be referenced on the club directory page of your District site. To update your club information, go to the "Edit Club Info & Settings" link, from the For Administrators section of the Admin page.

- ✓ **Add Additional Members** If you are going to have other members evaluate the trial website, you can add them to the site through the Active Members List. Remember that we will do a mass upload of your entire membership list from an Excel file that you provide once you subscribe, so don't worry about adding all their contact information. If you are going to have other members manage different parts of the site, such as the eBulletin, attendance, dues, etc., you will have to upgrade their access rights. You can also set up other Site Administrators. You can update a member's access level by editing their profile, and clicking on the Settings tab. To see a matrix of access rights and what they include, see this help page:

<https://www.clubrunnersupport.com/article/333-what-access-levels-are-there-in-clubrunner>

At this stage, it is advisable to choose one member of your club to be the *eBulletin editor*. Doing so will ensure you have a 'reply-to' e-mail address when you mail out your bulletin or any news blast. This [video](#) is a step by step instructional video explaining how to send targeted and personalized e-mail messages and add attachments. This short [video](#) is a visual step by step guide that shows you how to edit member profiles.

Member Data Upload

When you order, you can send us your member data in Excel format to upload to your site. This will save you having to enter your member profiles manually. If your District is online with ClubRunner, you will automatically see your member details on your club site. You can choose to keep this, or replace the list with the file you send us. Please note that if you choose to send in your member information it will replace any member data previously added during the trial period, including any custom fields created, with the exception of the site administrator.

- ✓ **Submit your member data** in Excel format to support@clubrunner.ca. Be sure to state your club name in the subject line. Data uploads require 7 to 10 business days to complete. Ensure that each field is placed in a separate column and that each member record occupies one row only. To expedite the turnaround time you can format your Excel file to match our sample file which was included in the confirmation email when you submitted your order.
- ✓ **Check for duplicates and add your member photos** after you receive confirmation from us that your data is complete, please login to your site to ensure that there are no duplicates. We will also set all login names and passwords to a certain formula, which will be specified in the email. You can now also add your member photos by clicking on their names within the Active Member List, then clicking on Update under the photo
- ✓ **Create any Custom Fields or Member Designations** After the upload is complete, you can create additional fields to the member profile, to allow members to add more information you wish to track that is not covered by the basic profile. Note that there are multiple tabs on the profile, and that Rotary specific information is located under the Rotary tab. For more instructions on adding custom fields, see this help page:

<https://www.clubrunnersupport.com/article/572-how-to-add-custom-fields>

Member designations are labels that you can assign to members, with additional comments, that are only editable by club executives. These are designed to track awards or recognitions such as PHF, Benefactors, etc. To create and manage designations, go to the “Member Designation” link in the Admin page. You will also be able to print reports, export to CSV, or email members by designation.

Adding a New Member

If you need to add a new member to your directory, click on *Member Area > Active Members List > Add New Member*. Fill out all the required fields including their login name and temporary password. You can always change the information once it is saved.

In order to edit one's information, click on *Member Area > Active Members List*. Browse through your members list until you locate whose information you want to edit. Click on their name and choose edit. You can also reset their passwords or mark them as ex-members. Always ensure that you save changes before proceeding to the next tab. Fill out all the relevant information needed in each tab. In the *Settings* tab, you may select the proper Club Access Level for the member. This allows you to set the website editing access rights for that member. You can now also add your member photos by clicking on their names within the Active Member List, then clicking on Update under the photo.

Removing or Changing Members' Statuses

You may encounter a time when you'll need to change the status of a member to on leave of absence or ex-member or remove the member from your database permanently. In order to delete a member from your directory, click on *Member Area > Active Members List > Mark Ex*. Enter a termination reason and date and then select Terminate Member. Next, go back to the Admin page and click on Inactive Members List. Click on the delete button next to the member's name and confirm by clicking on OK.

In order to reinstate an inactive member, click on *Member Area > Inactive Members List*. Click on the member's name and click on the Rotary tab. Select the edit button and change the 'Membership Type' to active. Remember to always save all your changes

Other Users

Other Users are considered to be non-members who are in your club's database. This feature allows you to add other membership types to your club website and allow them to receive news blasts, eBulletins, and login to register and volunteer for events. Other Users can be anyone from exchange students to prospective members to spouses.

In order to add another user, click on *Member Area > Other Users List > Add New Member*. Fill out the person's information and make sure to specify the Member Type. To delete the 'other user', click on *Member Area > Other Users List > Delete (next to member's name) > OK*.

To learn more about changing the Club's membership please read the articles in our [Membership Management](#) area.

Website Content & Layout

Before launching your site to your membership, you may want to populate your home page with some up to date content. You can also customize the front page with your preferred layout, theme, banner and navigation menu.

- ✓ **Design Your Home Page:** The layout you see on your home page is just the default. You can change the column structure, banner, footer, look and feel and location of widgets to suit your preference. This is done using the “Website Designer 3.0” link, accessible through the Admin page by Site Administrators only. As there are many possibilities with this designer, it’s recommended that you attend one of the [weekly webinars](#) held on Website Designer, or viewing an [On-Demand Demo](#). For more detailed instructions, [see this help page](#):

<https://www.clubrunnersupport.com/section/775-website-designer>

- ✓ **Add Content to Your Website:** After you have configured your layout, you will want to add some personalized content to your site, through the Stories, Links, Downloads, Speakers, Site Pages and Custom Pages modules. To access these content areas, either click on the links within the “Website Manager” section of the Admin page, or simply click on the Website tab, then select the “Website Content” menu option. For more detailed instructions on adding content to your site click on the following link:

<https://www.clubrunnersupport.com/section/776-website-content>

Launching Your New Site

Now that you have set up your site with content and updated all your membership information, you can launch the site to your members so that they can start to login and use the site to its full potential.

- ✓ **Email All Members** with a link to your site. Now that your member list along with email addresses has been uploaded, you can use the Email Message Center to send out a broadcast email to all members introducing the site and attaching the Member Cheatsheet, a one page guide on how to request their password and login. The Member Cheatsheet was provided to you when you first started, however a generic version is available within the Downloads section of our [Support Center](#).
- ✓ **Do a Presentation** at a Club Meeting. If you have Internet access and a projector available at your meeting venue, we recommend doing a demonstration of the new site as a club program. Since this is an overview and not all features are relevant to club members, we have a recommended agenda for a 20-minute presentation [available here](#).

- ✓ **Follow up With Reminders:** Bring up the site during the course of regular club activities and announcements, to remind members of how they can use it. For example, when announcing an upcoming event, remind them that details can be found within the calendar of the website. Ask each member to login and edit their profile, and perhaps ask them to update a certain field or add their photo. Follow up with members who have not yet done so.
- ✓ **Send an Active Member Update Request:** This feature shows you when the member profiles were last updated, and by whom. You can also send an update request to all or selected members, which sends an email containing their contact information and asking them to login to make any changes. This is a good way to encourage members to login to the site, and we recommend sending this regularly (semi-annually).

Domain Name

During the setup of your ClubRunner site, you will be given a domain name where you can access the system in parallel with your existing site, in the format `portal.clubrunner.ca/clubname`. If you have a domain name (web site address) that you would like to point to your ClubRunner site, you will need to transfer the domain name to our management. To do so, you will need to follow all 3 steps before we can initiate the transfer.

- ✓ **Change the Administrative Contact Email:** Login to your domain registration account and change the Admin contact email to domains@clubrunner.ca. If you are unsure of your domain details, contact us or search for your WHOIS record at the following link: <http://www.internic.net/whois.html>
- ✓ **Request the Authorization Code:** If you have an .org domain name, you will need to request this code from your registrar either by logging in to your account or by contacting their customer service (this depends upon your registrar, e.g. GoDaddy, Network Solutions, etc.)
- ✓ **Order a Domain Transfer:** After you have completed the above, you can now order your transfer with us by either specifying this on your order form or emailing us at domains@clubrunner.ca with the name of your domain and a request to transfer. The cost to transfer a domain name is \$29.95 per year for a minimum term of 3 years.

If you don't have a domain name, but would like to register one, provide us with your requested name (ie: `www.clubname.org`) and we will register it on your behalf for \$34.95 per year 3 years or \$29.95 per year for 5 years.

You can also choose to manage your domain name on your own, and point it to your ClubRunner website through domain aliasing. To learn more about how to accomplish this, [click here](https://www.clubrunnersupport.com/article/817-domain-aliasing-with-clubrunner) (<https://www.clubrunnersupport.com/article/817-domain-aliasing-with-clubrunner>).

Support & Training

During the entire process you have access to unlimited technical support. Visit our Support Center at <http://www.ClubRunnerSupport.com> to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful "how-to" documents and viewing on-demand demos.

- ✓ **[Knowledgebase](#)**: This is where you will find access to articles answering frequently asked questions on how to do virtually everything on ClubRunner.
- ✓ **[On-Demand Demos](#)**: Watch on-demand tutorials to learn how to accomplish tasks on ClubRunner.
- ✓ **[Webinar Training](#)**: We hold several webinars every week on various modules of ClubRunner. These are open to any member of your club, and we recommend that you have your club executives attend.
- ✓ **[Submit a Ticket](#)**: For technical support, use our Support Center to submit a ticket, or send an email to support@clubrunner.ca. Our turnaround time for email tickets is 1-2 business days.
- ✓ **[Phone our Support Team](#)**: You are welcome to call our dedicated support team at 1-877-469-2582 x2 or 1-905-829-5299 x2. Our business hours are Monday-Friday 9:00am-5:00pm Eastern Time.

Feedback & Product Development

ClubRunner has undergone significant improvements thanks to our customer's valuable feedback. We want to know how we're doing and what you'd like to see. Join the conversation and let's talk!

- ✓ **[Follow us on Twitter](#)**: Get in the know on the latest updates to ClubRunner
- ✓ **[Follow our Blog](#)**: Get Tips & Tricks as well as learn about the latest product enhancements
- ✓ **[Become a Fan on Facebook](#)**: Get ClubRunner news right on your Facebook feed.
- ✓ **[Join the ClubRunner Users Group on LinkedIn](#)**: Discuss best practices with other ClubRunner Users.
- ✓ **[Join Our LinkedIn Group](#)**: Learn more about beta testing opportunities, what's new and share your ideas with other ClubRunner users.