

Welcome to ClubRunner!



As a new subscriber to the ClubRunner community, we want you to get the most out of your site 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, click on the “Login” link at the top of your website and then on the “New and Existing Users – Retrieve Login Password” link. Simply follow the instructions on the screen to retrieve your username and setup your password. If your District is online with ClubRunner, your login credentials to the club website will be the same as what you use to access the District site. If you are not sure what your website address is or are unable to get your password, please email support@clubrunner.ca for assistance.

A screenshot of the ClubRunner login form. It has a title 'Enter your login information below:'. There are two input fields: 'Login Name' and 'Password'. Below the password field is a checkbox labeled 'Keep me logged in'. A blue 'Login »' button is positioned below the checkbox. At the bottom of the form, there is a red oval containing the text: 'New and existing users: retrieve login and/or reset password'.A screenshot of the 'Retrieve Login Information' form. The title is 'Retrieve Login Information'. The instructions read: '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 are 'Submit' and 'Cancel' buttons.

With your login credentials, you can now successfully log into your website. You will notice that the Login link will now read “Member Area”. Click on this to be directed to the Admin page. This is a member’s only page from where you will be able to change your login information, update the content of your site and much more.

For future reference, write your login information here:

Login Name	
Password:	

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.

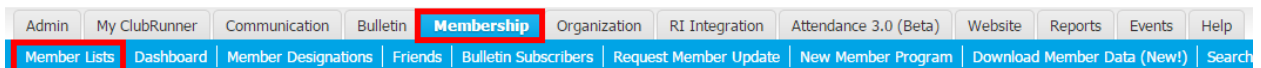
- **Submit your member data:** You can submit your member data in Excel format to memberdata@clubrunner.ca. Be sure to state your club name in the subject line. Data uploads require 7 to 10 business days to complete. Ensure that each field is placed in a separate column and that each member record occupies 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. You may also wish to grant non-members access to your site. To do so, follow the process [outlined here](#).
- **Add your member photos:** After you receive confirmation from us that your data is complete, please login to your site to check your data. We will also set all login names and passwords can be setup by members themselves. You can also add your member photos by following the steps [outlined here](#).
- **Create 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](#).

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. -

- **Define Access Levels:** You can update other members access levels to provide them with access to other features and modules and can also setup 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](#).

- **Integrate with Rotary International (Rotary Version feature only):** This automated integration means that every time a ClubRunner member profile is updated with new information, when member terminations are reported, when club officers are defined or when the club changes their meeting information, the ClubRunner system will seamlessly update the new records at Rotary International's databases. For more information on this feature and for instructions on how to activate it, please click [here](#).
- **Editing Member Profiles:** In order to edit an existing club member's profile information, click on the **Membership** tab and then on the **Member Lists** link. This will bring you to a list of member names. Click on the one you wish to edit. Browse through your members list until you locate whose information you want to edit. Click on their name and choose edit. You are brought to their profile page, which you may edit as needed. You may reset their password or choose their access levels by editing the member profiles.



- **Deactivating or Deleting Members:** From time to time you may need to remove a member from active association with your club. You can retain these members on your list as Inactive Members. In other cases, you may need to entirely delete a member from your club rolls. Follow the directions on [this page](#) to either deactivate or delete a member.

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.

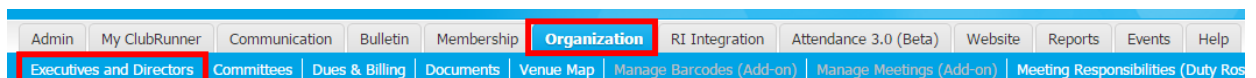
- **Change the Administrative Contact Email:** Login to your domain registration account and change the Admin contact email to domains@clubrunner.ca. If you are unsure of your domain details, contact us or search for your WHOIS record at the following link: <http://www.internic.net/whois.html>
- **Request 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 \$29.95 per year for a minimum term of 3 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 this process, [click here](#).

Club Information & Settings

- **Navigating ClubRunner:** Once you have logged on to your site you will see the Admin page is broken down into several sections with links under each. When you click on a certain link, you will be directed to that feature. You can also access these features using the tabs on the very top of the screen.
- **Define Your Executives & Directors:** When you first access ClubRunner you should check your listing of executives and directors to ensure accuracy. If your District is online with ClubRunner, this listing will automatically be populated with data saved on the District site. To access and update this list, click on the **Organization** tab and then on the **Executives and Directors** link. This will take you to a list of your current executives and directors.



For detailed instructions on how to manage your executive listing, see this [help page](#).

- **Check Club Meeting Info & Settings:** Ensure that you have the correct meeting times and locations established 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, if your District is online with ClubRunner. To check and update your club information, click on the “Edit Club Info & Settings” link from the Administrators section of the Admin page.

Administrator
Edit Club Info & Settings
Edit Meta Tags
Upload/Remove Meeting Venue Map
Edit Club Logo NEW!
Edit Custom Fields
Website Sponsorship Area
Upload Sponsorship Guide
Google Analytics NEW!

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. Only site administrators have access to the Website Designer. For an overview of the Website Designer please refer to [this video](#). 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](#).
- **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, [see this help page](#) and click on the topic of interest:

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 they may login and use the site to its full potential.

- **Email All Members:** 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 downloadable version is available within the Downloads section of our [Support Center](#).

- **Do a Presentation:** 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. We recommend sending this semi-annually.

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.
- ✓ [Downloads:](#) This area contains useful documents highlighting how-to's available for download.
- ✓ [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 customers 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.