Welcome to ClubRunner!

Congratulations on activating your 30 Day Free Trial! We want you to get the most out of your evaluation, so this guide has been put together to help you login and explore your ClubRunner site.

Note that once you are a subscriber, you will have access to many resources to help you setup, launch and maintain your ClubRunner site successfully. As part of our setup, we will upload your member data, so that you won't have to enter this information manually.

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 http://clubrunner.helpserve.com.

Logging In

To get started, please refer to the Welcome Email you received from us with detail of your trial site. Your temporary website address is usually in the form www.clubrunner.ca/clubname. You should find your login and password within this email, or you can always retrieve it from the site.

In order to retrieve your password, go to the "Login" link at the top of your website, then click on "I forgot my password". This will direct you to the "Forgot your password?" screen.

You will be asked to enter your last name and your email address. Once you click on "Get Login Info", you will shortly receive an e-mail with your login. 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. To follow a visual on how to log in, **click here**.

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.

✔ **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. When you are adding a member, set their access levels to Site Administrators so that they can play with all the features of the site during the trial period. 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:

http://clubrunner.helpserve.com/Knowledgebase/Article/View/70/0/how-to-set-up-a-members-access-rights

Note that you can also create specific site pages with assigned owners who will have full editing rights to that page, without having to upgrade their access levels.

✔ **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.
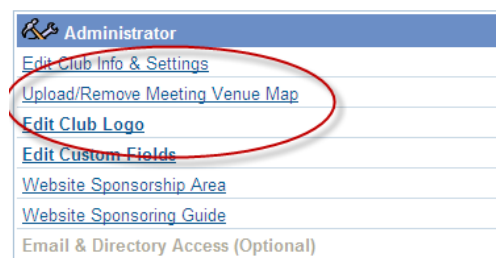
✔ **Upload Club Logo** Add your own Club Logo to your website by clicking on *Admin > Edit Club Logo.* In order to upload a new image, click on browse and choose your preferred image from your computer. For a visual step by step instructional video on editing your club's logo and updating your venue map, **click here**.

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, create custom distribution lists and add attachments. This short **video** is a visual step by step guide that shows you how to edit your member profile.

Adding a New Member

If you need to add a new member to your directory, click on *Admin > 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.

Tip: The name that appears at the top right of the page is actually the person currently logged in

In order to edit one's information, click on *Admin > 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. For more instructions on adding custom fields, see this help page: http://clubrunner.helpserve.com/Knowledgebase/Article/View/326/0/how-do-i-go-about-entering-additional-fields-in-the-profile-for-a-member-ie-club-benefactor-paul-harris-fellow-etc

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 *Admin > 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 *Admin > 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.
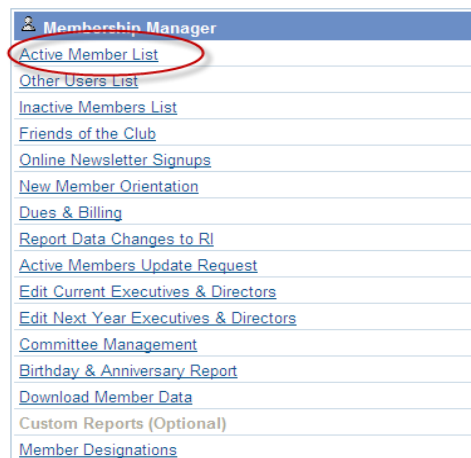

Other Users

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 *Admin > 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 *Admin > Other Users List > Delete (next to member's name) > OK.*

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, look and feel and location of widgets to suit your preference. This is done using the "Website Designer 2.0" 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.
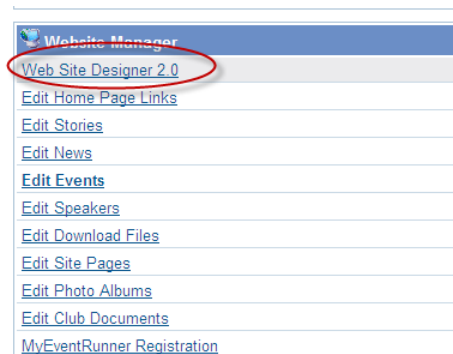
For more detailed instructions, see this help page:

http://clubrunner.helpserve.com/Knowledgebase/List/Index/178/website-designer-20

When you are in the Website Designer 2.0 module, look on the left hand side to see a listing of upcoming webinars. We recommend attending this webinar to take full advantage of the customizations available with this module.

✔ **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, News, Links, Downloads, Speakers and Site 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 instruction on adding content to your site, see this help page:

http://clubrunner.helpserve.com/Knowledgebase/List/Index/144/website-manager

We highly recommend attending the "Website Content & eBulletin" webinar to learn more about the various ways you can add content to your site, as well as learn best practices for assigning access levels. Links to the webinar training schedule and other useful resources are found at the end of this guide.

Launching Your New Site

Now that you have set up your site with some custom content, you can launch the site to your members so that they can start to login and use the site to its full potential. Remember that only those members who have been added to the Active Members List will be able to retrieve a password and login.

✔ **Email all members with a link** 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 is a PDF that was attached to the Welcome Email you received with the Trial site; however a generic version is available within the Downloads section

of our Support Center at http://clubrunner.helpserve.com.

✔ **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 within the Downloads section of our Support Center.

✔ **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 your 30 day trial, you will be given a domain name where you can access your ClubRunner site in parallel with your existing site, in the format www.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 order a domain transfer. A domain transfer will move the name to our management, and will require full cooperation from the existing domain registrar. Pricing for a domain transfer is $29.95 per year for a minimum extension of 3 years. This will add onto any existing time you have left on your domain. **To order a transfer, indicate this on your Order Form, or email us at domains@clubrunner.ca, then you will need to follow all 4 steps below 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 a .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.)

✔ **Unlock the Domain Name** Login to your current registrar and change the status of your domain to UNLOCKED. If you are with Network Solutions, you may need to contact them to do this.

✔ **Order a Domain Transfer** After you have complete the above, you can now order your transfer with us by either specify this on your order form or email 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 (typically the format used is www.samplerotary.org) and we will register it on your behalf for $29.95 per year for a minimum term of 3 years. Email this request to salesinquiry@clubrunner.ca or phone us at 1-877-469-2582.

Support & Training

During the entire process you have access to unlimited technical support. Visit our **Support Center** at http://clubrunner.helpserve.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 hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.
http://clubrunner.helpserve.com/Knowledgebase/List

✔ **Downloads** This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.
http://clubrunner.helpserve.com/Knowledgebase/List/Index/133/downloads

✔ **On-Demand Demos** For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available at http://clubrunner.helpserve.com/Knowledgebase/List/Index/108/on-demand-videos

✔ **Webinar Training** We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend. You can find the updated schedule at www.clubrunner.ca/webtraining.

✔ **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 2 business days. To submit a ticket, go to: http://clubrunner.helpserve.com/Tickets/Submit

✔ **Phone our Support Team** Intended for quick questions or to report high urgency items, you are welcome to phone our support team at 1-877-469-2582 Option 2. Our business hours are Monday to Friday, 9am to pm Eastern Time.

Feedback & Product Development

ClubRunner has undergone significant improvements over the past 7 years thanks to our customers valuable feedback. We want to know how we're doing, and what you'd like to see changed.

✔ **Interact on our Community site** We have recently launched a Community site for our users to interact and share with us their experience, and we actively monitor and participate in the discussions. To visit the community site, go to http://community.clubrunner.ca. You can login with your ClubRunner username and password to be able to participate in the discussion forums.

✔ **Follow us on Twitter** Get in the know on the latest updates to ClubRunner by following us on twitter @clubrunner.

✔ **Join our Blog** Updated every week, get tips and tricks as well as product enhancements notices. Sign up to be a follower and get notices on new posts. http://iloveclubrunner.blogspot.com.