ClubRunner Essentials

Learn to use some of the fundamental sections of ClubRunner





What is ClubRunner?

ClubRunner is a cloud based software service that manages organization and membership information, as well as facilitates easier communication between the various levels of an organization.

ClubRunner:

- Is a private software company that has been serving thousands of service clubs worldwide for almost 15 years.
- Is a collaborative, web-based tool designed to allow members to collectively share and maintain their data.
- Can handle small clubs with just a few members, all the way up to mutli-level organizations with thousands of members.

How do I login?



At the top right of your ClubRunner homepage, click the 'Member Login' button:

								Member Login
ORANGEMetro	Home	About Us -	Get Involved 🗸	News & l	Jpdates -	Calenda	r 🗸 Contact Us	s Donate
Input your pre-assigne password:	ed login r	name and		3	Along the Administ	e top clicl ration pa	< Member Login t ge:	o login to the
Service Club of Purple Metro							Mickey D	D Member Area Logout
ClubBu	nnor				Home	About Us	- Get Involved -	ews & Updates +
Сшыки	nner							
Enter your login information	n below: Forgot login nar	ne?			Service Club of Pe Admin My ClubRunner Events Volunteers He	urple Metro Communication Bulletin	New Bulletin (Beta) Contacts Membership Orga	Welcome, Mickey [Logout] Admin Home Page 🖪 🖪 🚺
Password	Forgot passwo	rd?			Admin Club Info & Settin Download the Mobile App Access your member directo go!	ngs Edit Privacy Policy Cl	ubRunner Mobile Help Guides Webinars Contact S	Support Community
⊠Keep me logged in	New us	er?			Help Support Center On Demand Videos	۲. F	lew to ClubRunner or need a refresher? Register fo tead up on our latest updates! Release Notes are a	or free ClubRunner webinars here. available on our Service Updates page.
Logir	1				Webinars Submit a Ticket	(My ClubRunner	O Membership Manager
© 2002-2019 ChibRunner, / Privacy Statement Online Help	ll rights reserved. <u>System Requirements</u>				Enhanced Committees Mode MyEventRunner Online Payment & eCommer Module - US	ule ()	Change My Password Jpload My Photo My Commitments My New Member Activities Kew Me Ferende	Active Member List Other Users List Inactive Members List Friends of the Club Building Subpacibure

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Help article: <u>How do I login?</u>



How do I retrieve my login?

If you don't know, or don't remember, your login & password then click the blue **Forgot**? Buttons.



2 Now input your last name and email address. An automated login retrieval email will be sent to you. If you still are unable to login, for further assistance please send an email to: logins@clubrunner.ca

Retrie	ve Login Information	
Please enter your last name and/or reset your	ame and email address to retrieve your le password.	ogin
* Denotes a required f	ield.	
Last Name:		
Email Address:		*
		_
	Submit	
	Cancel	

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Help article: <u>I Cannot Login to ClubRunner</u>

How do edit my profile?

1

Along the top tabs click

MyClubRunner - My Profile:

Servi	ce Club of Pi	urple Metro			
Admin	My ClubRunner	Communication	Bulletin	New Bulletir	ו (B
My Profi	<mark>le</mark> My Commitm	ents My Attend	ance My	Committees	Di

2

Inside your profile, below your photo, there are several tabs such as: **Personal | Rotary | Biography | etc.** Select any of these tabs. These tabs contain all the different sections of your profile you can edit. Click the Edit button to edit your information.

Member Profile	•							
Update M	lickey D rintable Vers	ion						
Personal Rotary Bi	iography (Commitments	Settings	Privacy			Edit	-
Member Details								
	Title				Gender	Male		
	First Name	Mickey			Date of Birth			
Μ	iddle Name				Anniversary			
	Last Name	D			Spouse/Partner First Name			
	Nickname				Spouse/Partner Last Name			
	Suffix				Spouse/Partner Nick Name			~

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Help article: <u>How do I access & change my profile information?</u>

How do I send email?

1

Along the top tabs click: **Communication – Email Services**, then **Compose new message**.

0	
2	

Step 1 = select your recipients
Step 2 = compose the subject and body of email

3

Step 3 = add attachment
Step 4 = send a list of recipients; cc yourself
Step 5 = send now, or schedule email for later

Service Club of						Welcom	e, Mickey D [Log		English 👻
Admin My ClubRunner	Communication								
New Website (Beta) Report									
Email Services Email Traffi	c Report Mana	ige Blocke	d Emails						
Capicoo								←	Go back
Manage Emails	C		mmunicati	20					
Edit Custom Distribution Lists	C		minuficatio						
Email Templates	То	modify o	r resend a messag	e to the same	e recipients,	click the Resen	d option. Use t	he Copy opt	ion to
New Member Templates	co	py the en	nail without recipier	ts.					
Custom Signature		1	Show All Emails	Show My Em	ails Only	Active Emails	~ 🕀 Co	mpose new	
Help									
Help Articles	Filt	ter record	ls:						
Video: Sending an email		Stat	tus 🗸		Subject -		0	wner 🗸	Actions
Video: Creating Templates		Dra	ft		,		N	lickey D	•
		Sen	t on Dec 11, 2018 a	t 5:49 PM	Custom p	age link test #2	N	lickey D	•

Enter your email subject and message.
Subject
This is my subject
Templates and Merge Fields
Select Template – Select Group – 🗸
Desisiont Desisiont Tale
Recipient I file
Sender Sender First Name V Add
Account Full Name v Add
The Nick Name merge field will be replaced by First Name if it is empty.
×6回回回◆◇ ######## ♥ 囲 Qは第
🖾 Image 🖻 Templates 🚍 😳 Ω 🛥 🛄 🔀
Normal (· Font · 18 · B I U S ×, × I I E 2 1 E 2 1 . A
99 +1 1. @ Source

	Step 3 (Optional): Upload attachments to your email.
	Select Files For Upload Maximum 5.00 MB per file Total attachment size: 0 B/6.00 MB
	Step 4:
	Choose your email options and send.
	Send a list of recipients as an attachment.
	Copy me on this email.
	Step 5:
<u>e</u>	You can send the email right now, or click on schedule to choose when you would like to send it.
	 Send right now
	◯ Schedule

How do I access reports?

Along the top tabs click the Reports tab to reveal the reports we have: Admin My ClubRunner Communication Bulletin New Bulletin (Beta) Contacts Membership Organization RI Integration Attendance Website New Website (Beta) Reports Events Volunteers Help eDirectory Reports 2.0 eDirectory Builder 2.0 Club Dashboard Years of Service Age Distribution Gender Distribution Rule of 85 Birthdays and Anniversaries Login Activity Download Member Data Member Activity Club Activity

Available reports include:

edirectory Reports 2.0 - a collection of printable member reports in PDF and MS Word format edirectory Builder 2.0 - create your own printable member reports **Club Dashboard** - various membership reports that automatically update monthly **Years of Service** - how many years of service each member has contributed to Rotary Age Distribution - age demographic breakdown of your club **Gender Distribution** - gender demographic breakdown of your club **Rule of 85** - members in your club who qualify as *Rule of 85*, sometimes called *Senior Active* Birthdays & Anniversaries - member and spouse birthdays and anniversaries Login Activity - which members have logged into the website Member Area, and when Download Member Data - create custom MS Excel files using all member data that we store Member Activity - a breakdown of member's activities and participation in the club Club Activity - Overall member participation, including events and club activities at a glance

How do I add a new member?

Along the top tabs click **Membership** – **Member Lists**:



In the Active Members List click the orange Add New Member button

2



Fill in all appropriate information. Fields marked in red are required.

Activ	e	Me	mt	pers	s Li	st																						
Membe	ersp	per F	Page:	25	•																							
All	А	В	С	D	Е	F	G	Н	Т	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	Х	Y	Z		
																										A	dd New N	<i>l</i> ember
																												•
Email		B	By Fir	st Na	ame	Nam	ne 🔺										т	уре		A	cce	ss	Act	ion				
		Aaro	nsor	, Aar	on												А	ctive	9	7	0		Cha	nge	Stati	us	Reset Pa	ssword
		Aaro	nsor	, Erin	n												A	ctive	9	7	0		Cha	nge	State	us	Reset Pa	ssword



Note that these are the minimum required fields, you can input more information later.

How do I edit an existing member?

Along the top tabs click **Membership** – **Member Lists**:

Admin	My ClubRunner	Communication	Bulletin	New Bu	ılletin (Beta)	Contacts	Membership	Organization	RI Integration	Attendance	Website	New Website (Beta)	Reports	Events	Volunteers	Help
Member L	<mark>ists</mark> Dashboard	l Member Desig	nations	Friends	Bulletin Sub	scribers	Request Member	Update New	/ Member Progran	n Download	Member Da	ta Search Member e	Directory			

In the Active Members List click on any member's name in blue.

2

ACTIVE	e Mei	mbe	rs Li	ist																							
Member	rs per Pa	age:	25 •																								
All A	АВ	C D	E	F	G	Н	T.	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	Х	Y	Ζ			
																								A	dd N	ew Me	embei
																											►
Email	B	y First I	Name	Nam	ne 🔻										т	уре		/	Acce	SS	Act	ion					•
Email	By Aaror	y First I Ison, A	Name aron	Nam	ne 🔻										Т	ype Active	2	/ 7	Acce: 70	SS	Acti	ion inge (Statu	IS	Rese	t Pass	• sword
Email	By Aaron Aaron	y First I Ison, A Ison, El	Name aron rin	Nam	ne 🔻										T A A	ype Active	2	, , ,	Acce: 70 70	SS	Acti Cha	ion Inge S	Statu Statu	is is	Rese	t Pass t Pass	sword
Email බ	By Aaron Aaron Arnol	y First I Ison, A Ison, Ei d, Kath	Name aron rin y	Nam	ne 🔻										T A A	ype Active Active	2 2	7 7 7	Acce: 70 70 70	SS	Acti Cha Cha	ion inge S inge S	Statu Statu Statu	is is is	Rese Rese Rese	t Pass t Pass t Pass	sword



This takes you to the member's profile. Change any information by clicking the **Edit** button.

Update	Printable V	ironson 'ersion				
Personal Rotary	Biography	Commitments	Settings	Privacy		
						Ed

Note: on the club website only members with access levels of *50, 40 and 30* can edit other member profiles.

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Help article: What is The Member Profile & How Do I Edit It?

How do I terminate a member?

Along the top tabs click **Membership** – **Member Lists**:

Admin My	ClubRunner	Communication	Bulletin	New Bul	lletin (Beta)	Contacts	Membership	Organization	RI Integration	Attendance	Website	New Website (Beta)	Reports	Events	Volunteers	Help
Member Lists	B Dashboard	Member Design	ations	Friends	Bulletin Sub	scribers	Request Member	Update New	/ Member Program	n Download	Member Da	ta Search Member e	Directory			

3

Aaron Aaronson



In the Active Members List click on Change Status beside any member's name.

Acti	ve	Me	mb	ers	: Li	st																					
Meml	bers	per P	age:	25	•																						
All	Α	В	С	D	Е	F	G	Н	T.	J	К	L	М	Ν	0	Ρ	Q	R	S	т	U	۷	W	X	Y	Ζ	
																										A	dd New Member
																											•
Ema	ail	B	y Firs	t Na	me	Nan	ne 🔻										т	уре			Acce	ss	Act	ion			
٢	Aaronson, Aaron															Д	ctive	e		70		Change Status Reset Password					
		Aaro	Aaronson, Erin											Д	Active			70		Change Status Reset Password							
٢		Arnold, Kathy										Active				70			Change Status Reset Password								
		Benn	ett, N	lorma	а												Д	ctive	9		70		Cha	inge	Statu	IS	Reset Password

You must choose a reason for termination to

activate the blue Terminate Member button.

termination to Rotary International.



Change Status for Aaron Aaronson									
Please choose one of the following options to continue making changes to this person's status. To change status from Active to Other, please terminate membership first.									
-									
OR	Change this member to a former member; e.g. Ex Member, Duplicate, etc.								
Change Membership Status	Change this member from Active to Honorary								
OR									
Edit Active Member Type	Edit this member's Active member type; e.g. Active - Satellite, Active - Corporate, etc.								



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Help article: How do I terminate or delete an active member?

Help Resources

www.ClubRunnerSupport.com

support@clubrunner.ca 1-877-469-2582



