# **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 <del>-</del>	Calendar	- Contact Us	Donate
Input your pre-assigne password:	ed login r	name and		3	-	e top click ration pag	Member Login to ge:	o login to the
Service Club of Purple Metro							Mickey D	Member Area Logout
ClubRu					Home	About Us <del>-</del>	Get Involved -	ews & Updates +
Clubku	nner							
Enter your login information	∦ H below: Forgot login nan				Service Club of Pu Admin My ClubRunner Events Volunteers Hel		iew Bulletin (Beta) Contacts Membership Organia	Welcome, Mickey [Lopout] Admin Home Page 🖪 🖬 🖬
Password	Forgot passwo	rd?			Download the Mobile App Access your member director go!		Runner Mobile Help Guides Webinars Contact Sup ration	oport Community
⊠Keep me logged in	New us	er?			Help Support Center On Demand Videos		w to ClubRunner or need a refresher? Register for f ad up on our latest updates! Release Notes are ava	
Logir					Webinars Submit a Ticket ClubRunner Add-ons		My ClubRunner t My Profile	Membership Manager
© 2002–2019 <u>ClubRurner</u> / <u>Privacy Statement   Online Help</u>					Clubeunner Add-ons Enhanced Committees Modu MyEventRunner Online Payment & eCommerc Module - US	e Upi ce My My	ange My Password oad My Photo Commitments New Member Activities Kasa Ferende	Active Member List Other Users List Inactive Members List Friends of the Club Bulletin Scheeribers

### ClubRunner

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 na name and/or reset your	ame and email address to retrieve your l password.	ogin
* Denotes a required f	ield.	
Last Name:		
Email Address:		*
	Submit	
	Cancel	

## ClubRunner

#### 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 Bulletin	n (Be
My Profi	le My Commitm	ents My Attenda	ince 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 Mickey D Printable Versi	on		
Update Personal Rotary Biography C	ommitments Settings	s Privacy	
Member Details			Edit
Title		Gender	Male
First Name	Mickey	Date of Birth	
Middle Name		Anniversary	
Last Name	D	Spouse/Partner First Name	
Nickname		Spouse/Partner Last Name	
Suffix		Spouse/Partner Nick Name	

### ClubRunner

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 Purpl	e Metro	Welcome, M	ickey D [Logout ] Home English 👻
Admin My ClubRunner Communi	cation Bulletin New Bulletin (Beta) Cont		
New Website (Beta) Reports Ever			
Email Services Email Traffic Report	Manage Blocked Emails		
Services			← Go back
Manage Emails	Club Communication		
Edit Custom Distribution Lists	Club Communication		
Email Templates	To modify or resend a message to the	same recipients, click the Resend o	ption. Use the Copy option to
New Member Templates	copy the email without recipients.		
Custom Signature	Show All Emails Show M	Active Emails	🕑 Compose new message
Help			
Help Articles	Filter records:		
Video: Sending an email	Status 🚽	Subject -	Owner - Actions
Video: Creating Templates	Draft		Mickey D 🚽
	Sent on Dec 11, 2018 at 5:49	PM Custom page link test #2	Mickey D 👻

Step 1:	Step 2:
Select the recipients of this message by expanding each category,	Enter your email subject and message.
then clicking the 'Expand List' link. Please note: you will not be able to select recipients that have not supplied an email address.	Subject
Active and Honorary Members (0/76)	This is my subject
Other Users (0/1)	Templates and Merge Fields
Inactive Members (0/24)	Select Template – Select Group –
<ul> <li>Custom Distribution Lists (0/0)</li> </ul>	Recipient Title
<ul> <li>Contact Groups (0/58)</li> </ul>	
	Sender Sender First Name V Add
	Account Account Full Name v Add
	The Nick Name merge field will be replaced by First Name if it is empty.
	🖬 Image 🖨 Tomplates 🚍 😳 Ω 🛥 🗐 🛠
	Normal ( * Font * 18 * B I U S ×, × <sup>2</sup> I <sub>X</sub> E S S E D * A*
	99 ×1 1. De Source
	This is my email body

	Step 3 (Optional): Upload attachments to your email.
	Select Files For Upload Maximum 5.00 MB per file Total attachment size: 0 8/6.00 MB
	Step 4:
	Choose your email options and send.
	Send a list of recipients as an attachment.
	Copy me on this email.
· <u>A</u> ·	Step 5: 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	ve	Me	emt	bers	s Li	st																							
Memb	ers	per F	Page:	25	•																								
All	Α	В	С	D	Е	F	G	Н	Т	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	Х	Y	Ζ			
																										A	dd Nev	/ Membe	er
																												•	,
Emai	il	E	By Fir	st Na	me	Nam	ie 🔺										т	уре		A	cces	ss	Act	ion					
		Aaro	onsor	n, Aar	on												A	ctive	9	7	0		Cha	inge	Statu	ls	Reset I	Passwor	rd
		Aaro	onsor	n, Erin													A	ctive	9	7	0		Cha	inge	Statu	ls	Reset I	asswor	rd



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 C	ClubRunner C	Communication Bu	ulletin Ne	w Bulletin (Beta)	Contacts	Membership	Organization	<b>RI Integration</b>	Attendance	Website	New Website (Beta)	Reports	Events	Volunteers	Help
Member Lists	Dashboard	Member Designati	ions Frien	ds Bulletin Sub	scribers	Request Member	Update New	Member Program	Download	Member Da	ta Search Member e	Directory			

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

2

Active	e Me	mb	ers	Lis	st																					
Member	s per F	age:	25	•																						
All A	В	С	D	E	F	G	Н	$\mathbf{I}_{i}$	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	Х	Y	Ζ	
																									Ad	d New Member
																										•
Email	E	ly Firs	t Narr	ne I	Nam	e 🔻										т	уре		A	cce	ss	Acti	ion			
٨	Aaro	nson,	Aaror	n												А	ctive	è	7	0		Cha	nge	Statu	s   R	teset Password
	Aaro	nson,	Erin													А	ctive	9	7	0		Cha	nge	Statu	s   R	leset Password
٨	Arno	ld, Kat	thy													А	ctive	è	7	0		Cha	nge	Statu	s   R	leset Password
			orma														ctive		_	0		01				leset Password



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

Update	Printable V	ronson 'ersion				
Personal Rotary	, Biography	Commitments	Settings Pri	vacy		
						_

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

# ClubRunner

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 Bu	lletin (Beta)	Contacts	Membership	Organization	<b>RI Integration</b>	Attendance	Website	New Website (Beta)	Reports	Events	Volunteers	Help
Member Lists	B Dashboard	Member Design	nations	Friends	Bulletin Sub	scribers	Request Member	Update New	v Member Program	n Download	Member Da	ta Search Member e	Directory			

3



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

Activ	/e	Me	mb	ers	s Li	ist																					
Memb	ers	per Pa	age:	25	Ţ																						
All	Α	В	С	D	E	F	G	Н	T.	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	X	Y	Ζ	
																										Ad	d New Membe
																											•
Emai	il	B	y Firs	st Na	me	Nam	ne 🔻										T)	ype		4	Acces	SS	Act	ion			
٢		Aaronson, Aaron												A	Active			70			Change Status   Reset Password						
		Aaronson, Erin											A	Active			70		Change Status   Reset Password								
		Arnold, Kathy												Active			7	70			Change Status   Reset Password						
		Benn	ott h	lorm	~												۵	ctive		-	0		Cha	nae	Statu		eset Password

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.										
Terminate Membership	Change this member to a former member; e.g. Ex Member, Duplicate, etc.									
OR										
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.									





## ClubRunner

4

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

# **Help Resources**

www.ClubRunnerSupport.com

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



