

ClubRunner Essentials

Learn to use some of the fundamental sections of ClubRunner

What is ClubRunner?

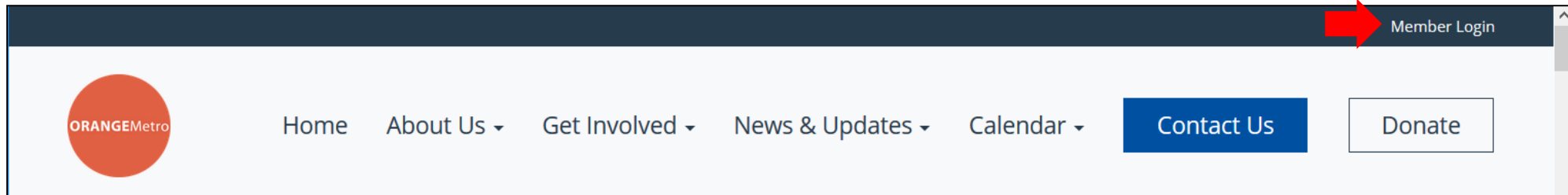
ClubRunner is a cloud based software service that manages organization and membership information, as well as facilitates easier communication between the various levels of an organization.

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 multi-level organizations with thousands of members.

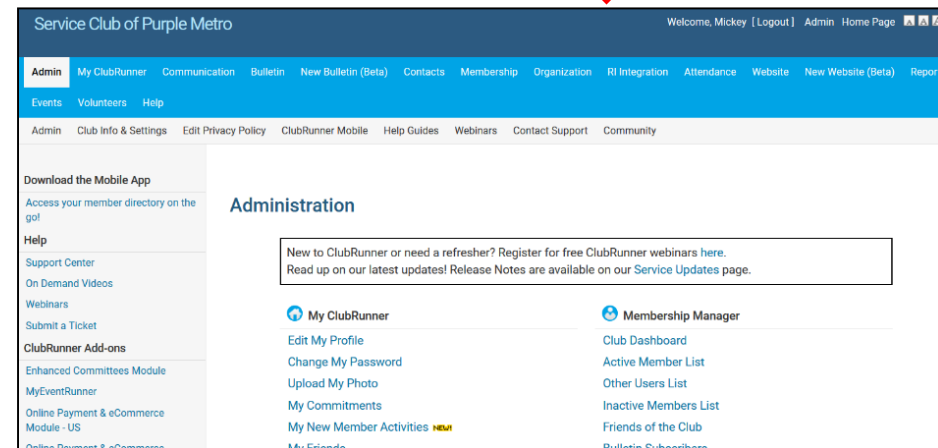
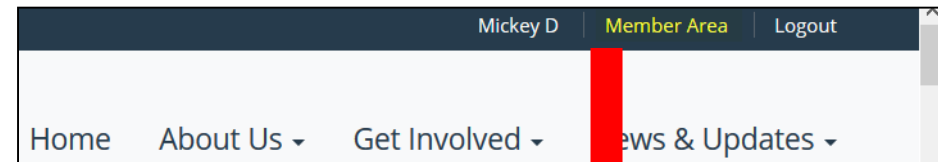
How do I login?

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



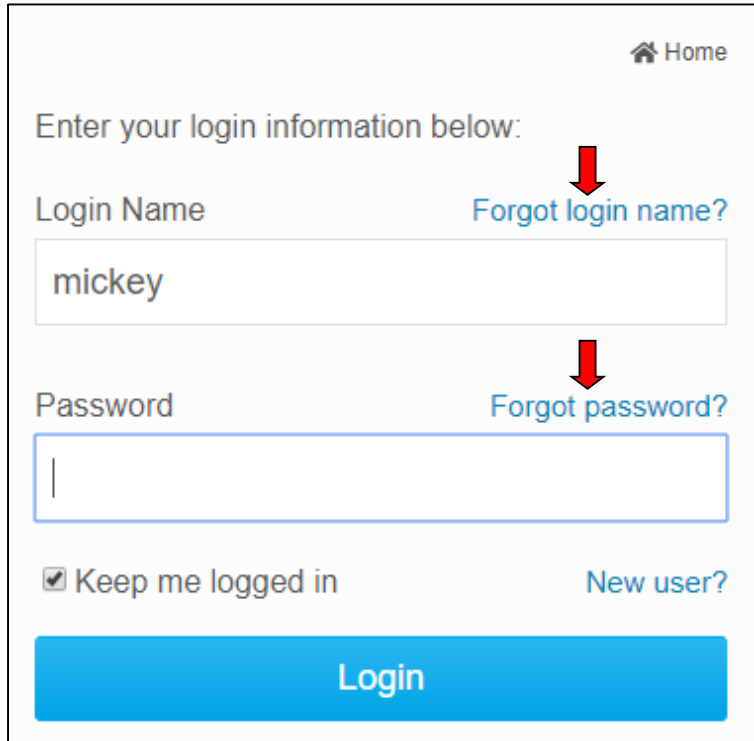
2 Input your pre-assigned login name and password:

3 Along the top click Member Login to login to the Administration page:



How do I retrieve my login?

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



Home

Enter your login information below:

Login Name [Forgot login name?](#)

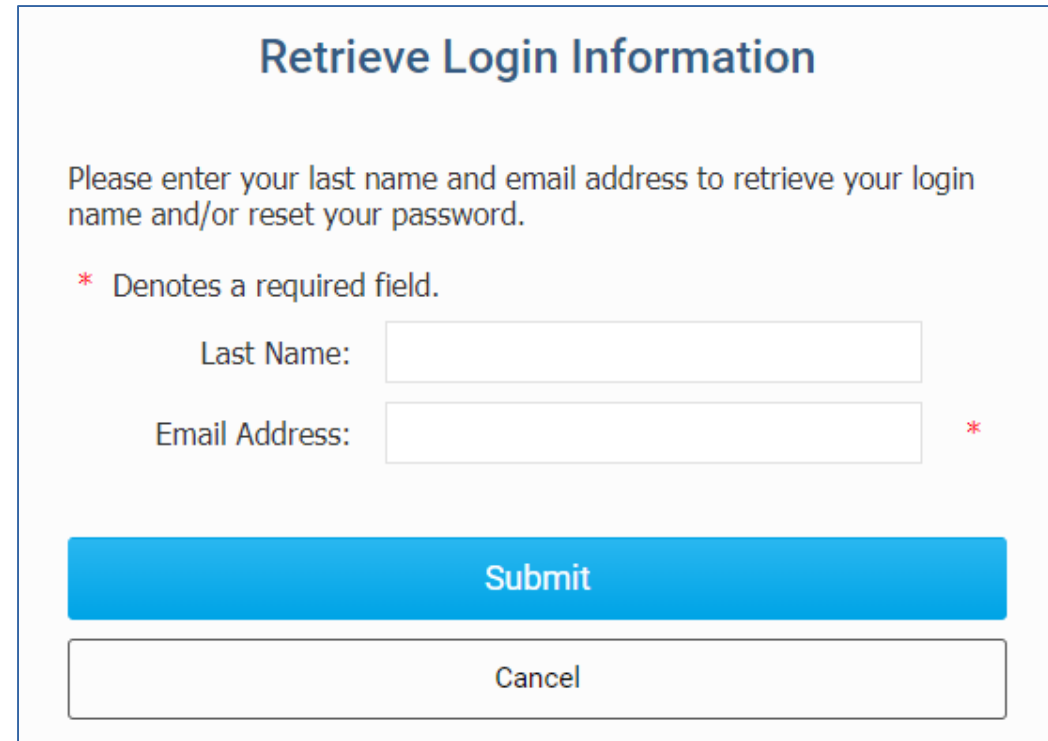
mickey

Password [Forgot password?](#)

Keep me logged in [New user?](#)

Login

- 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**



Retrieve Login Information

Please enter your last name and email address to retrieve your login name and/or reset your password.

* Denotes a required field.

Last Name:

Email Address: *

Submit

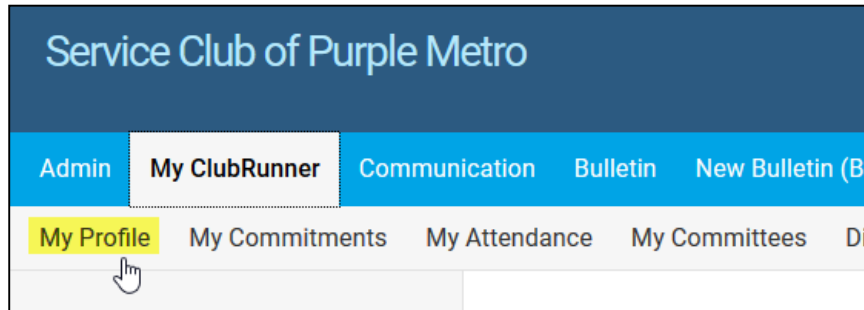
Cancel

How do edit my profile?

1

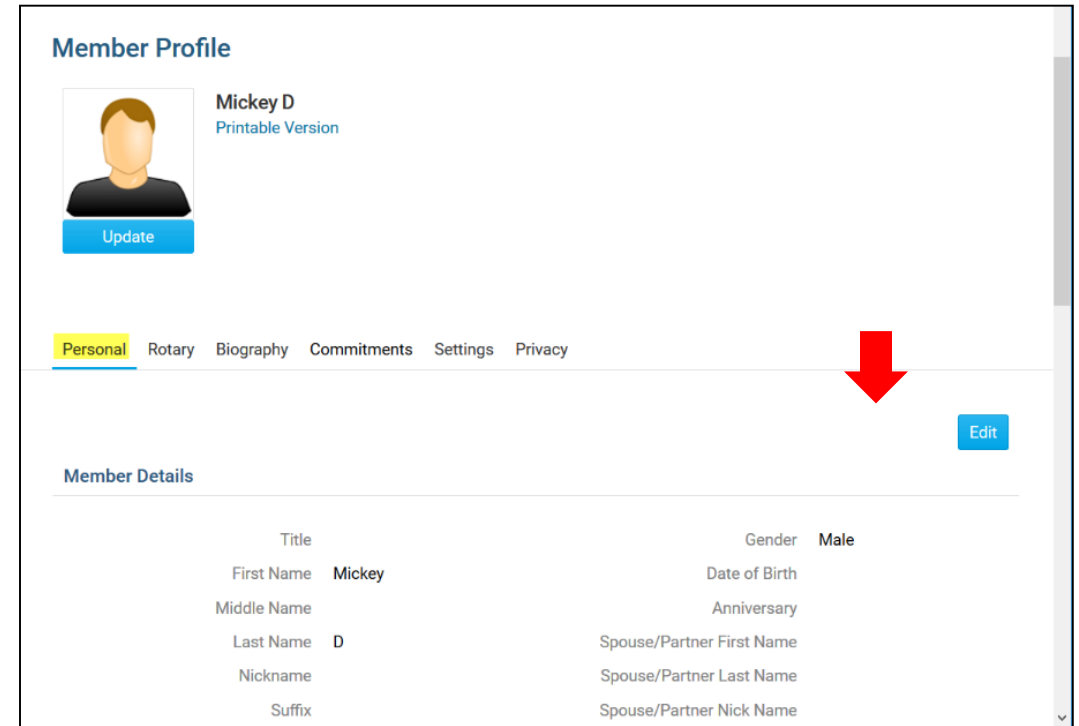
Along the top tabs click

MyClubRunner - My Profile:



2

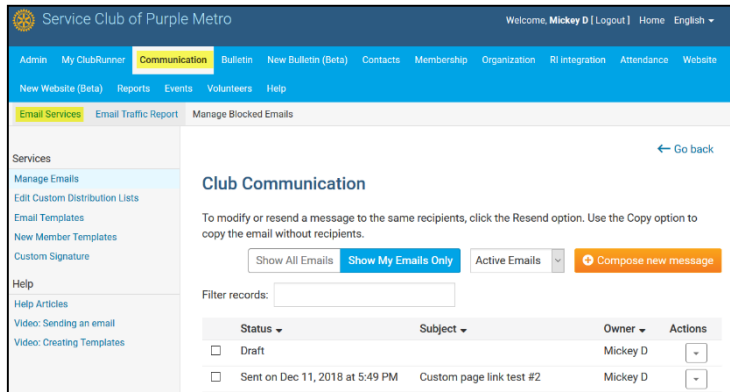
Inside your profile, below your photo, there are several tabs such as: **Personal | Rotary | Biography | etc.** Select any of these tabs. These tabs contain all the different sections of your profile you can edit. Click the Edit button to edit your information.



How do I send email?

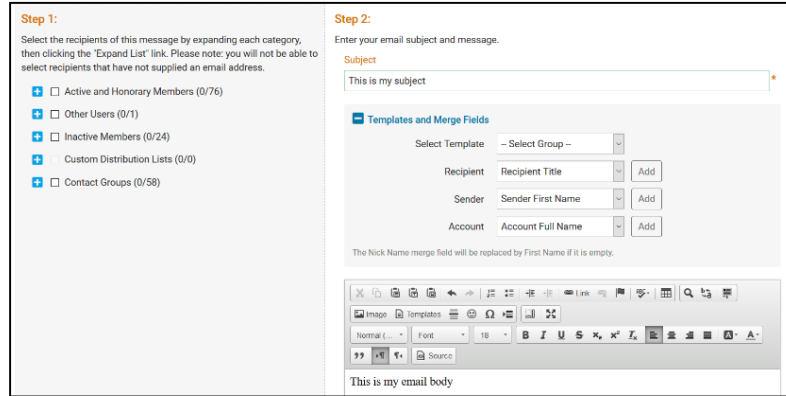
1

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



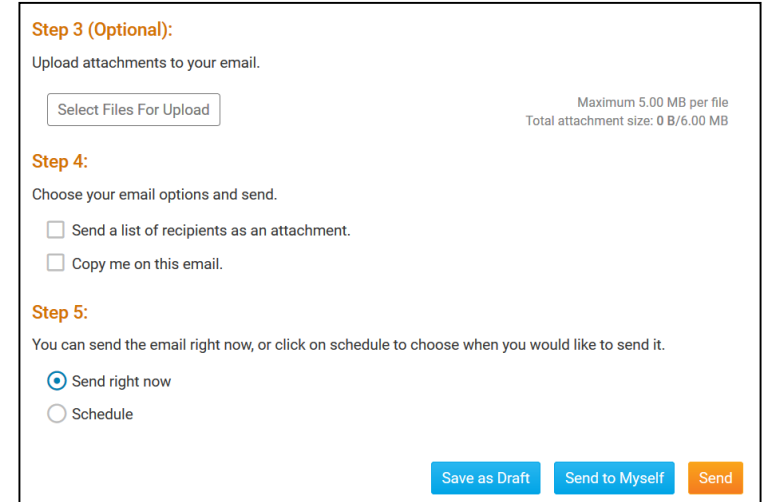
2

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



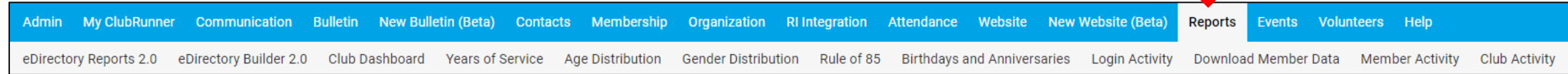
3

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



How do I access reports?

Along the top tabs click the **Reports** tab to reveal the reports we have:



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

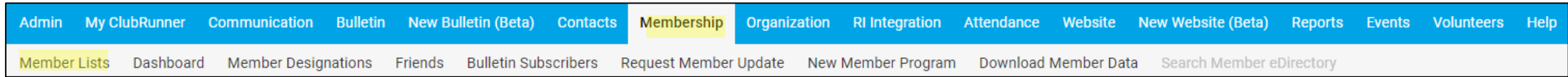
Download Member Data - create custom MS Excel files using all member data that we store

Member Activity - a breakdown of member's activities and participation in the club

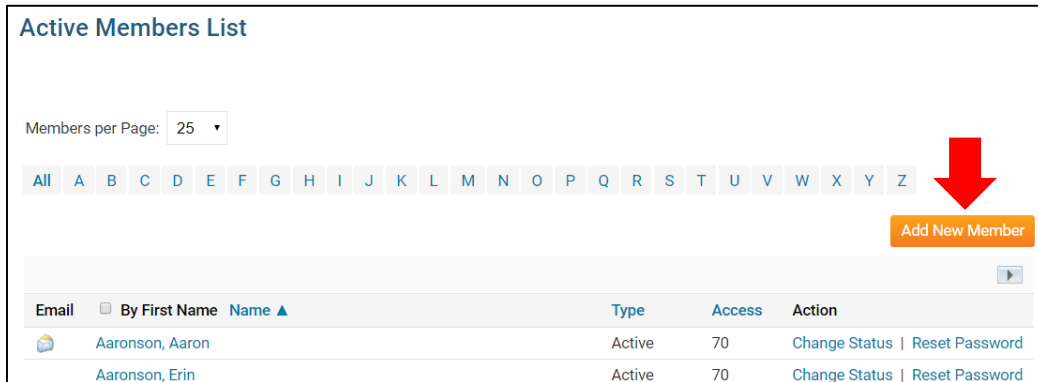
Club Activity - Overall member participation, including events and club activities at a glance

How do I add a new member?

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



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



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

Rotary Club of Purple Metro
Oakville, ON, Canada

Title

First Name

Middle Name

Last Name

Suffix

Gender Male Female

Membership Type

Sponsor

Date Joined Rotary

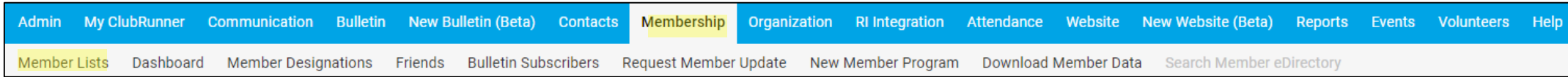
Date Joined Club

RI requires that Date Joined Club must be within the past 30 days.

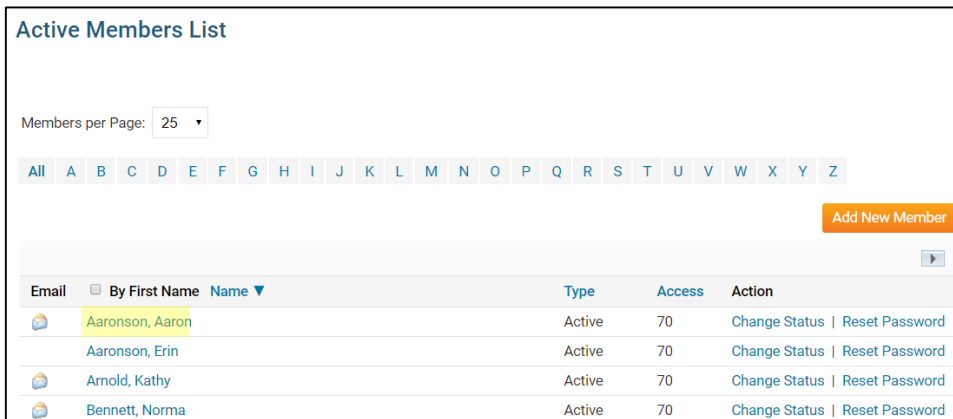
Note that these are the minimum required fields, you can input more information later.

How do I edit an existing member?

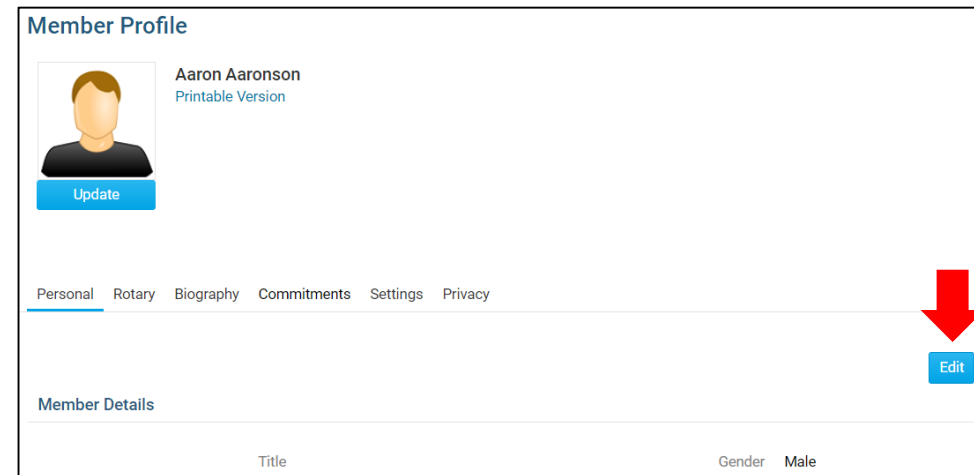
1 Along the top tabs click **Membership – Member Lists**:



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



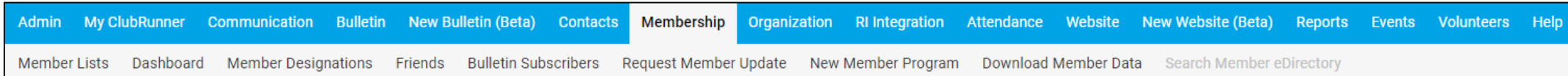
3 This takes you to the member's profile. Change any information by clicking the **Edit** button.



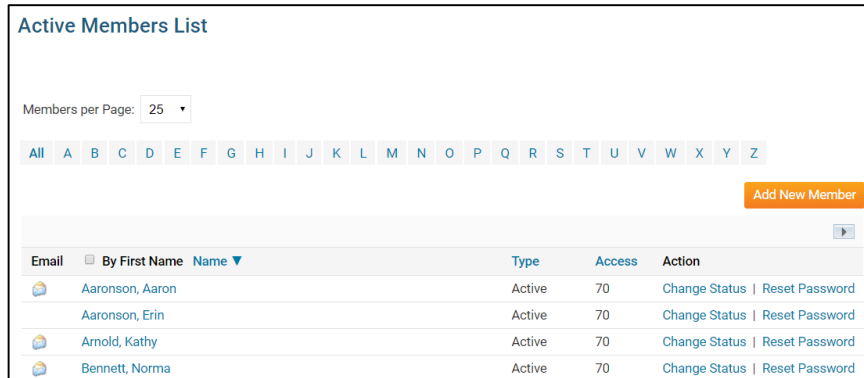
Note: on the club website only members with access levels of 50, 40 and 30 can edit other member profiles.

How do I terminate a member?

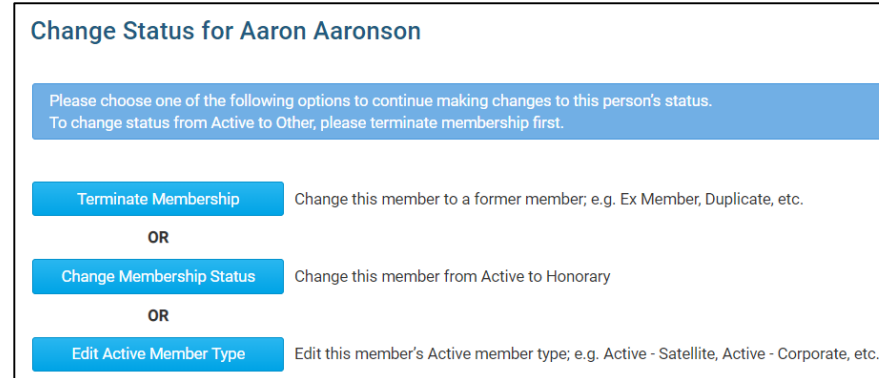
1 Along the top tabs click **Membership – Member Lists**:



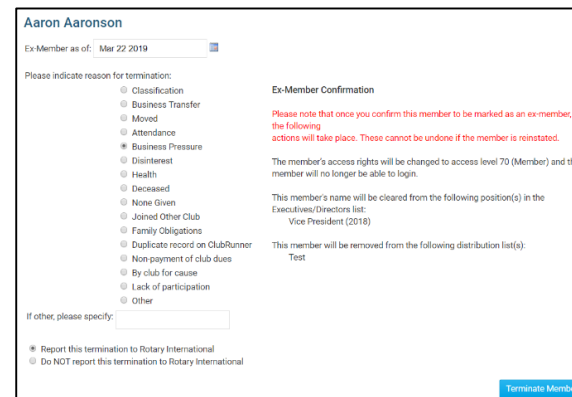
2 In the Active Members List click on **Change Status** beside any member's name.



3 On the Change Status screen click **Terminate Membership**



4 You must choose a reason for termination to activate the blue **Terminate Member** button. Except in special cases, always choose *Report this termination to Rotary International*.



Help Resources

www.ClubRunnerSupport.com

support@clubrunner.ca

1-877-469-2582