

ClubRunner Essentials

District Conference Breakout

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What is ClubRunner?

ClubRunner is a web-based software service (platform) 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.

What is ClubRunner?

- ClubRunner, is an award-winning software for clubs that want to effectively:
 - **Boost** Public Relations
 - **Increase** visibility
 - **Improve communication** between members
 - **Better organize** their club
- It is an **online service** comprised of powerful tools designed to:
 - Give your club a strong **online presence**
 - Maintain your **club data**
 - Boost **communications**
 - Organize **events** and **volunteers**
 - Help your club run more **efficiently and easily**

Key Benefits of ClubRunner

- Superior communication features
- No need to know any technical language;
- Effective club image & improved public relations with professional website themes and layout options
- Stronger membership growth and retention
- Centralized club reporting and administration
- Better handling of events and volunteers
- Efficient and easy management of committees
- Increased data security
- Automatic transfer of information between districts and other clubs

ClubRunner Essentials

Learn to use some of the fundamental sections of ClubRunner

What is ClubRunner?

[View 90-second video](#)

ClubRunner Considerations

- **Cost - \$200 initial setup fee; monthly charge varies by club size (\$23 - \$115)**
- **Free trial – 30 days**
- **Less costly versions available (CR Lite or Admin versions); fewer features**
- **Add-on features (modules) available for additional cost**
 - **Events**
 - **On-line payments**
 - **Enhanced committees**
 - **Other languages**

ClubRunner Access Levels

There are seven types of access levels:

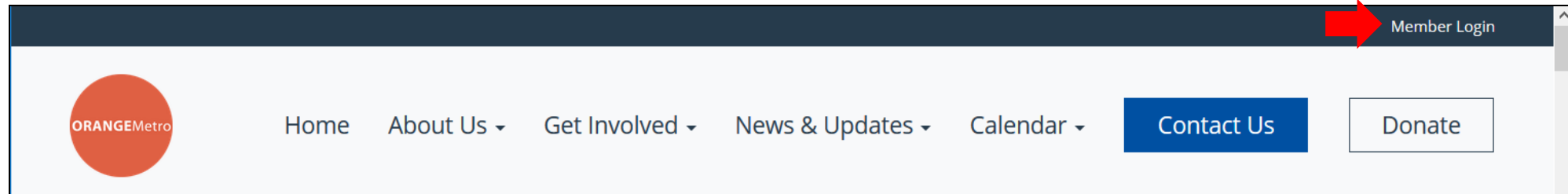
- 30 [Site Administrator](#) - This is for the member or members who changes the website and administrates the club. This access gives them the access to do everything in ClubRunner
- 40 [Club President](#) - This is reserved for the current year president. This gives access to everything except for changing the website.
- 50 [Club Executive](#) - This is for Club Executives and Directors. This gives access to everything except for changing the website.
- 60 [Editor](#) - This is for members who would like to write stories, create the bulletin, and events.
- 70 [Member](#) - This is the default access. This lets members edit their own profiles, send email, pay invoices, and view the club directory.
- 80 [Restricted Member](#) - This restricts the member from sending emails.
- 90 [No Access](#) - This will not let the member login.

Examples of ClubRunner sites

- District 5060 <https://portal.clubrunner.ca/50005>
- Wenatchee, WA www.wenatcheerotary.org
- Kamloops West <https://portal.clubrunner.ca/821>

How do I login?

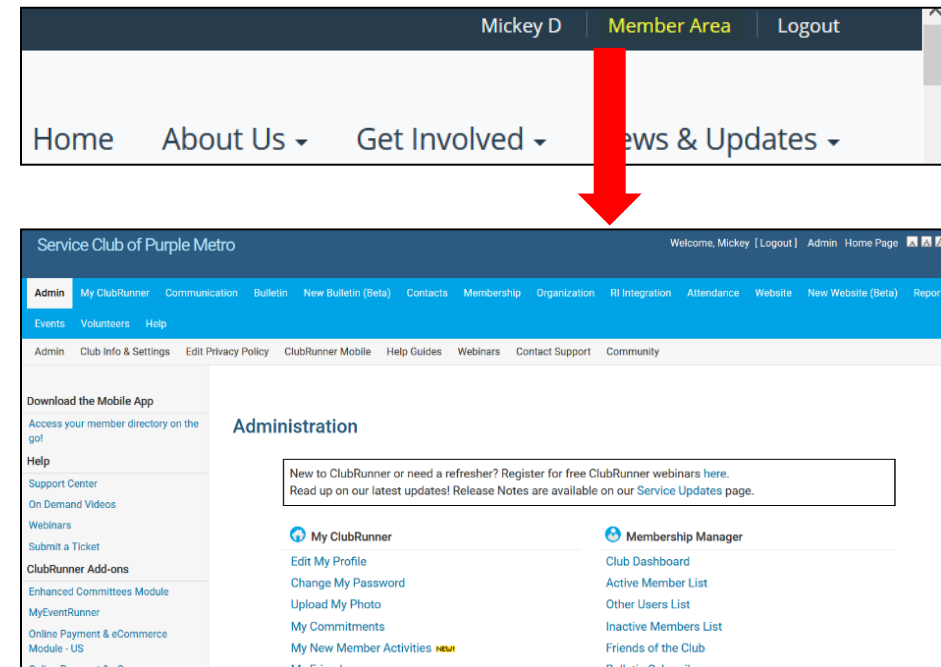
1 At the top right of your ClubRunner homepage, click the 'Member Login' button:



2 Input your pre-assigned login name and password:

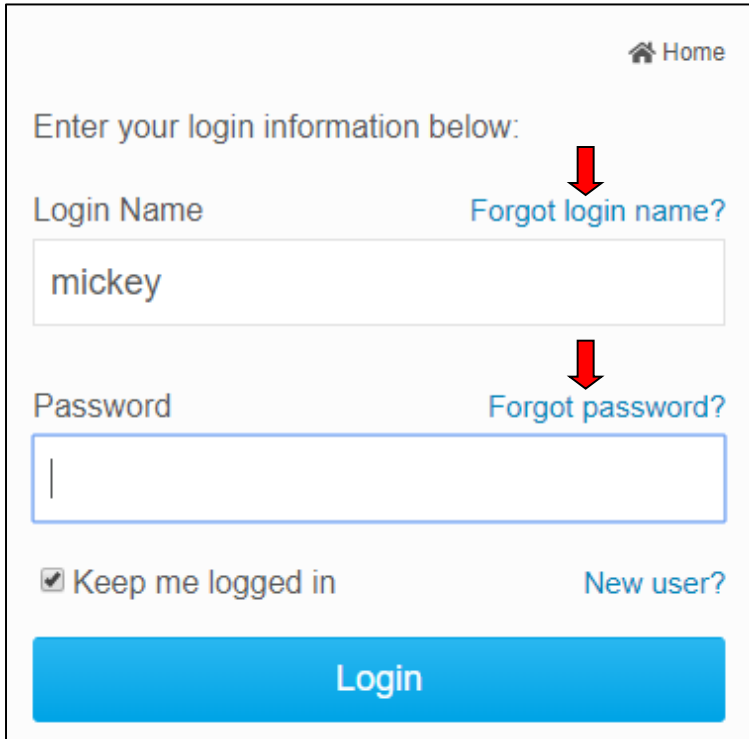
A screenshot of the ClubRunner login page. The page has a blue background with the ClubRunner logo at the top. Below the logo is a white login form with fields for Login Name and Password, and buttons for Forgot login name?, Forgot password?, Login, and New user?.

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?](#)

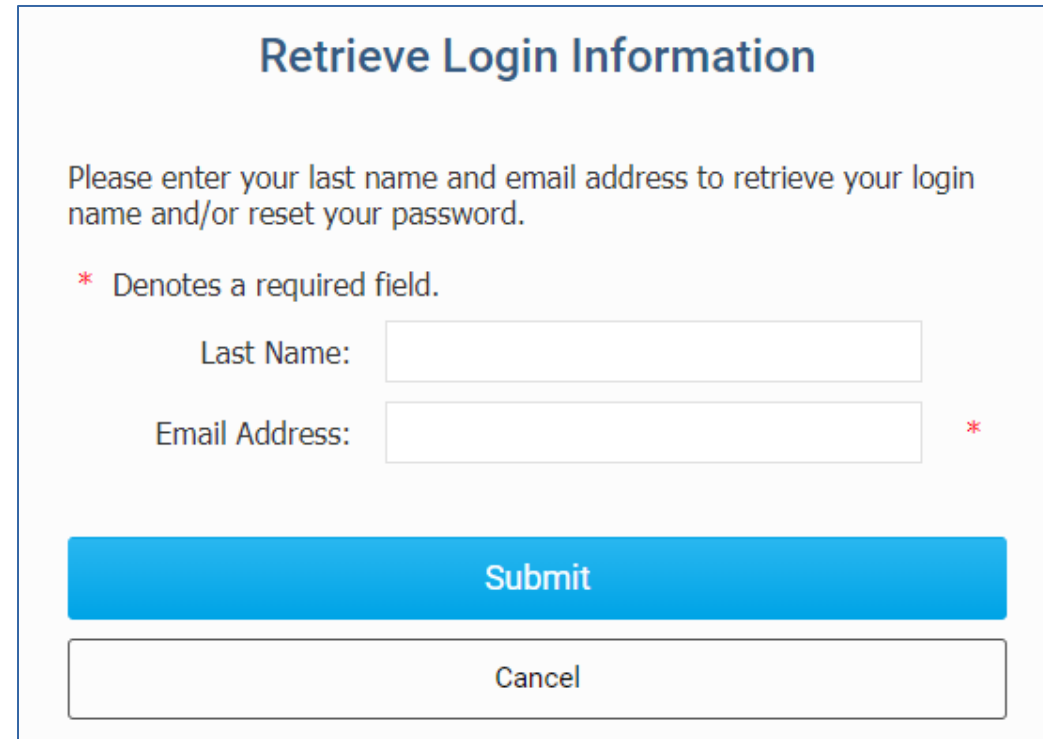
mickey

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

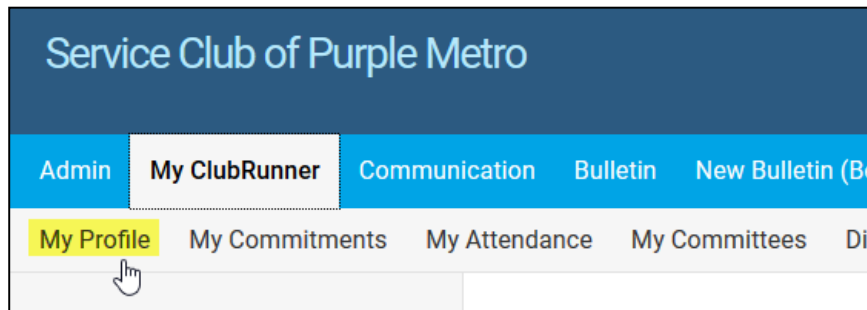
Cancel

How do edit my profile?

1

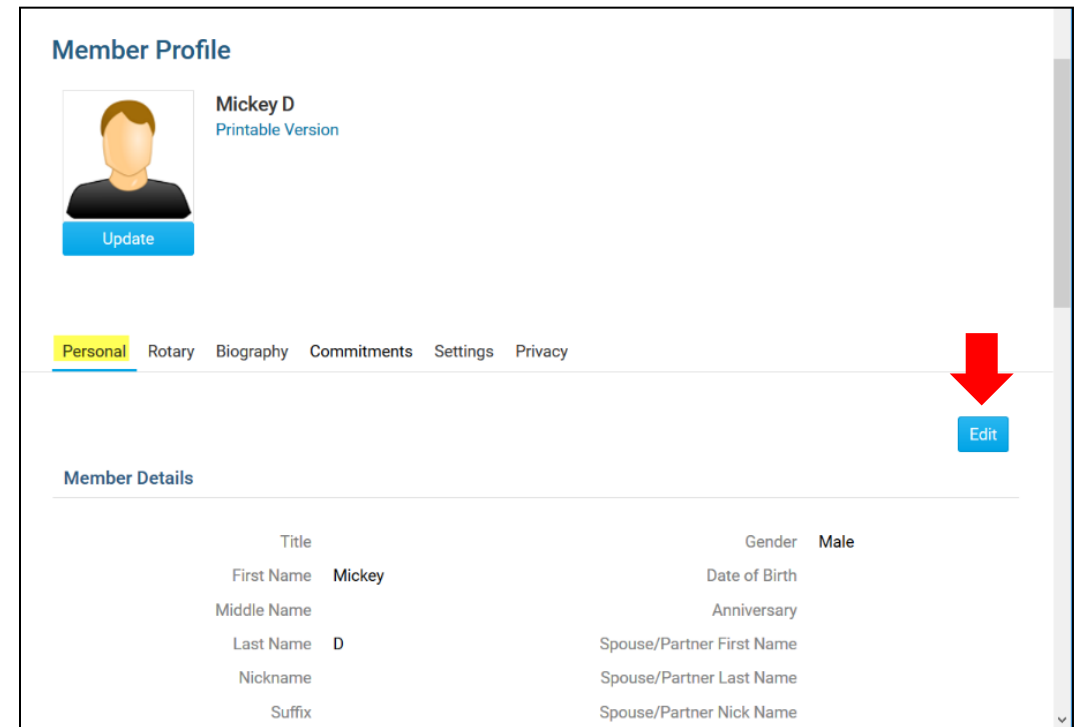
Along the top tabs click

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 see member contact information?

1

Along the top tabs click:
My ClubRunner, then Directories.

2

Step 1 = scroll down to target member
Step 2 = Information is tabulated
For photo directory, see left side panel

3

To email a member

Step 1 = scroll down to target member
Step 2 = Click email address
Step 3 = Prepare/send email when template opens

How do I see/edit Executive members?

1

To view -
Along the top tabs click:
Organization, then Executives

2

To edit (if authorized) -
Along the top tabs click:
Organization, then Executives
Click edit tab at right; edit & save.
To edit NEXT YEAR ...
Click blue button “Carry over ...”
Then edit

How do I synchronize club data with RI?

1

Along the top tabs click:
RI Integration, then
Compare and synchronize

OR for executives, click
Executive Compare &
Synchronize

2

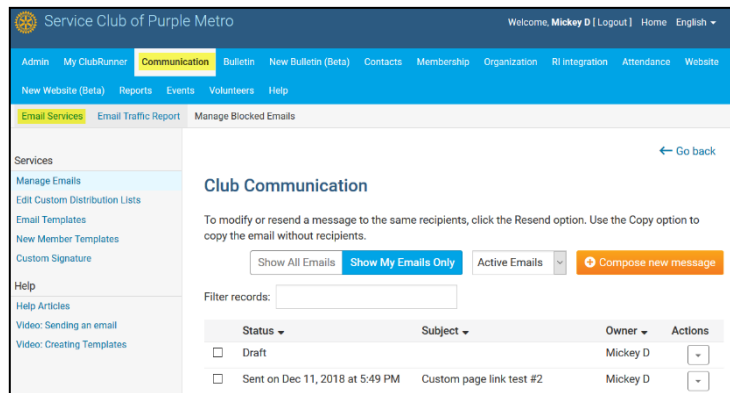
A Page “Members in Sync” opens
For any member, Click “Compare”
Follow instructions to edit either database

Steps are similar for executives

How do I send one or more emails?

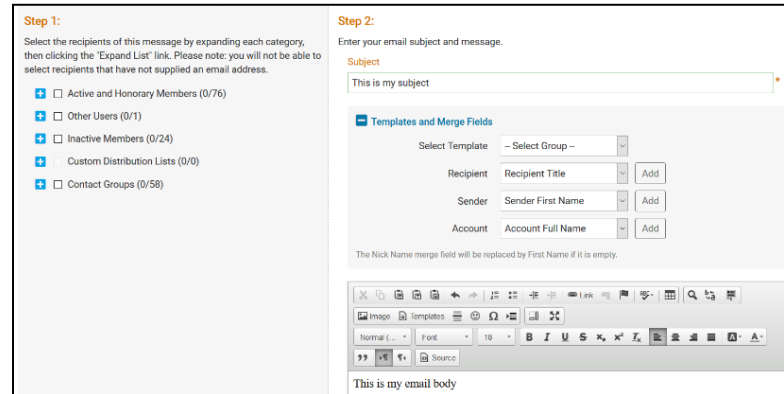
1

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



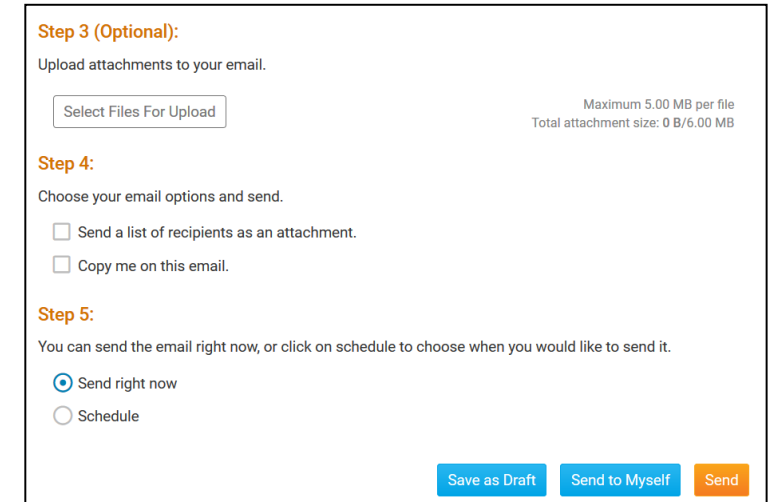
2

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



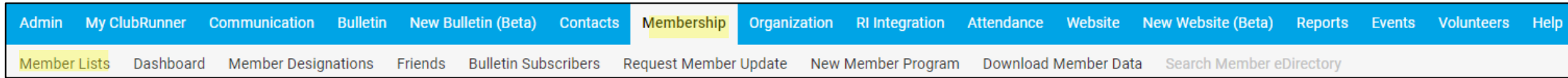
3

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

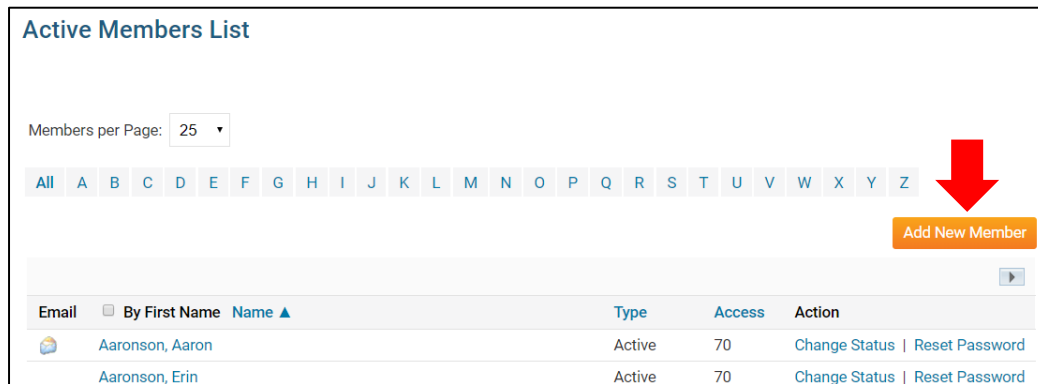


How do I add a new member?

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

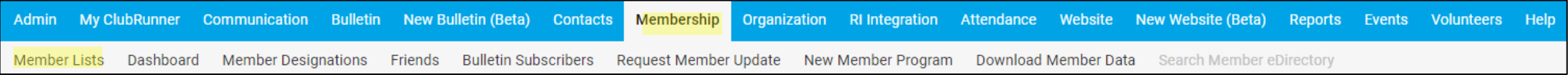
Date Joined Club

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

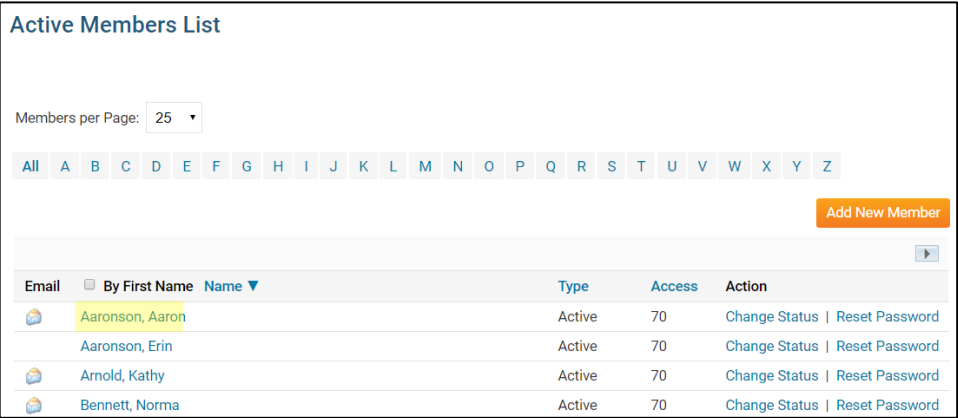
Note that these are the minimum required fields, you can input more information later.

How do I edit an existing member?

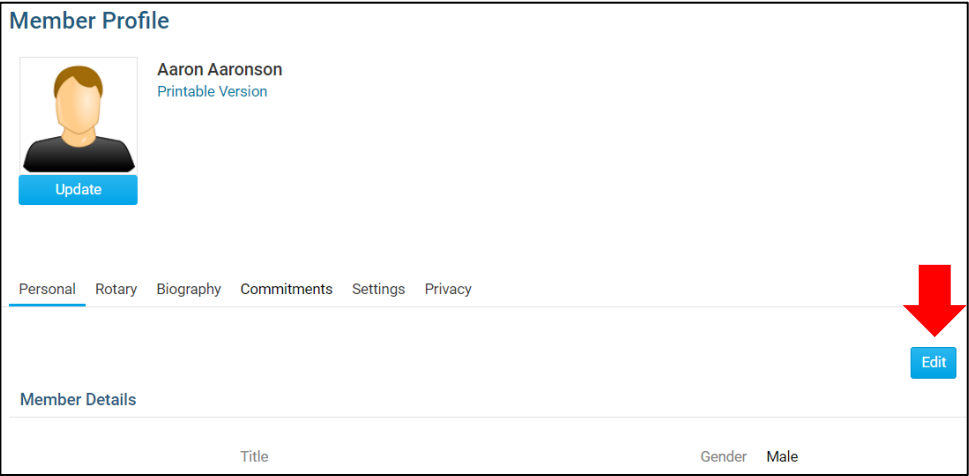
1 Along the top tabs click **Membership – Member Lists**:



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



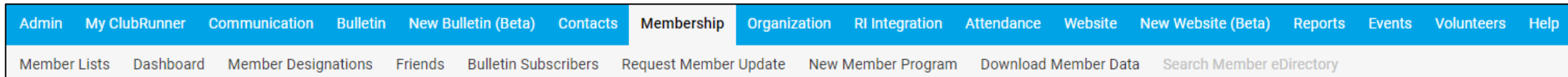
3 This takes you to the member’s profile. Change any information by clicking the **Edit** button.



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.

Active Members List

Members per Page: 25 ▼

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Add New Member

Email	By First Name	Name ▼	Type	Access	Action
	Aaronson, Aaron		Active	70	Change Status Reset Password
	Aaronson, Erin		Active	70	Change Status Reset Password
	Arnold, Kathy		Active	70	Change Status Reset Password
	Bennett, Norma		Active	70	Change Status Reset Password

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

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.

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*.

Aaron Aaronson

Ex-Member as of: Mar 22 2019

Please indicate reason for termination:

- ☐ Classification
- ☐ Business Transfer
- ☐ Moved
- ☐ Attendance
- ☒ Business Pressure
- ☐ Disinterest
- ☐ Health
- ☐ Deceased
- ☐ None Given
- ☐ Joined Other Club
- ☐ Family Obligations
- ☐ Duplicate record on ClubRunner
- ☐ Non-payment of club dues
- ☐ By club for cause
- ☐ Lack of participation
- ☐ Other

If other, please specify:

Ex-Member Confirmation

Please note that once you confirm this member to be marked as an ex-member, the following actions will take place. These cannot be undone if the member is reinstated.

The member's access rights will be changed to access level 70 (Member) and this member will no longer be able to login.

This member's name will be cleared from the following position(s) in the Executives/Directors list:
Vice President (2018)

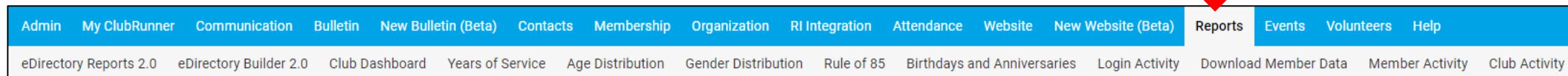
This member will be removed from the following distribution list(s):
Test

* Report this termination to Rotary International
☐ Do NOT report this termination to Rotary International

[Terminate Member](#)

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

Other actions

[Download the CR Member Cheat Sheet](#)

[Download CR Setup Guide \(for new subscribers\)](#)

[See Frank's home made flow chart.](#)

Affordable Pricing

Monthly Fee Structure

ClubRunner is now available in 3 versions:

Club Size	Admin*	Lite*	Full*
Up to 20	\$17.95	\$16.95	\$22.95
21 – 30	\$23.95	\$22.95	\$28.95
31 – 40	\$27.95	\$29.95	\$34.95
41 – 50	\$31.95	\$34.95	\$39.95
51 – 80	\$36.95	\$39.95	\$45.95
81 – 120	\$46.95	\$49.95	\$57.95
121 – 200	\$55.95	\$59.95	\$68.95
201 – 300	\$73.95	\$79.95	\$91.95
301 – 500	\$90.95	\$99.95	\$114.95

One time setup fee of \$199

Subscriptions include:

- Core modules, hosted in a world class data center
- Disk storage, bandwidth and automated data backup
- Initial upload of your membership data to your site
- Integration with RI's database
- Access to our Knowledgebase and eSupport center
- Dedicated technical support
- Ongoing webinar training

Every subscription comes with a 30-day full money back guarantee.

**Payable annually in advance. Subject to the terms and conditions of the ClubRunner subscription agreement. Prices subject to change.*

Help Resources

www.ClubRunnerSupport.com

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