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 mutli-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



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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
 - o **Events**
 - **o** On-line payments
 - Enhanced committees
 - Other languages



ClubRunner Access Levels

There are seven types of access levels:

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

Examples of ClubRunner sites

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



How do I login?

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

								N
								Member Login
ORANGEMetro	Home	About Us 🗸	Get Involved 🗸	News & U	pdates -	Calendar -	Contact Us	Donate
Input your pre-assigne password:	d login n	ame and		3	Along the Administr	e top click M ration page:	lember Login to l	ogin to the
Service Club of Purple Metro							Mickey D	Member Area Logout
ClubRu	nner				Home	About Us 🗸	Get Involved -	ews & Updates 🗸
Externeur lacin information	A Ho	me			Service Club of Pu	rple Metro		Welcome, Mickey [Logout] Admin Home Page 🖪 🖪
	Delow:				Admin My ClubRunner	Communication Bulletin New Bul	letin (Beta) Contacts Membership Organizatio	
Login Name	Forgot login nam				Events Volunteers Help Admin Club Info & Setting	p as Edit Privacy Policy ClubRunner	Mobile Help Guides Webinars Contact Support	Community
Password	Forgot passwor	d?			Download the Mobile App Access your member director go! Help	y on the Administratio	on	
⊠Keep me logged in	New use	er?			Support Center On Demand Videos	New to Cl Read up o	ubRunner or need a refresher? Register for free on our latest updates! Release Notes are availabl	ClubRunner webinars here. le on our Service Updates page.
Login					Webinars Submit a Ticket	G My Cl	ubRunner	Membership Manager
© 2002–2019 <u>ClubRunner</u> All <u>Privacy Statement</u> Online Help I S	rights reserved. system Requirements				ClubRunner Add-ons Enhanced Committees Modul MyEventRunner Online Payment & eCommerce	e Change N Upload M My Com	ly Password y Photo nitments	Active Member List Other Users List Inactive Members List
					Module - US	My New M	Member Activities New	Friends of the Club

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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 na name and/or reset your	ame and email address to retrieve your lapassword.	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?

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	l <mark>le</mark> My Commitm	ents My Attend	ance My	Committees	Di

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.

Update M	lickey D intable Versi	ion					
<mark>Personal</mark> Rotary Bi	ography C	ommitments	Settings	Privacy			Edit
Member Details							
	Title				Gender	Male	
	First Name	Mickey			Date of Birth		
Mi	iddle Name				Anniversary		
	Last Name	D			Spouse/Partner First Name		
	Nickname				Spouse/Partner Last Name		

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

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How do I see member contact information?

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

Step 1 = scroll down to target member
Step 2 = Information is tabulated

For photo directory, see left side panel

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

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Help article: How do I send email?

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

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How do I send one or more emails?



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



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

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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 Purple	e Metro	Welcome, Mir	s key D [Logout] Home English -
Admin My ClubRunner Communie	cation Bulletin New Bulletin (Beta) Cont		
New Website (Beta) Reports Ever			
Email Services Email Traffic Report	Manage Blocked Emails		
Continon			← Go back
Manage Emails	Club Communication		
Edit Custom Distribution Lists	club communication		
Email Templates	To modify or resend a message to the	e same recipients, click the Resend op	tion. 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: Select the recipients of this message by expanding each category, then clicking the "Expand List" link. Please note: you will not be able to select recipients that have not supplied an email address.	Step 2: Enter your email subject and message. 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 -
Custom Distribution Lists (0/0)	
Contact Groups (0/58)	Recipient Title
	Sender Sender First Name V Add
	Account Full Name - Add
	The Nick Name merge field will be replaced by First Name if it is empty.
	La Imago la Tempiatos ≡ ™ Ω → Ξ La 25
	99 - 1 T. @ 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 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.
8 3- <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 add a new member?

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



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 Bulle	etin (Beta)	Contacts	Membership	Organization	RI Integration	Attendance	Website	New Website (Beta)	Reports	Events	Volunteers	Help
Member	Lists Dashboa	rd Member Desig	inations	Friends B	Bulletin Subs	scribers	Request Member	Update Nev	v Member Program	n Download	Member Da	ta Search Member e	Directory			

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

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Active	e Mer	nber	s Li	st																					
Member	s per Pa	ge: 2!	5 •																						
All A	В	C D	E	F	G	н	I J	К	L	М	N	0 P	Q	R	S	т	U	V	W	Х	Y	Z			
																						ļ	Add N	lew M	lembe
																									•
Email	Ву	First N	ame	Nam	ie 🔻									Туре		1	Acces	SS	Act	ion					•
Email	By Aaron	First Na	ame ron	Nam	ie 🔻									Type Active	e	-	Acces	ss	Act Cha	ion ange	Statu	l sı	Res	et Pas	swore
Email	By Aaron	First Na son, Aar son, Erii	ame ron	Nam	ie 🔻									Type Active Active	e	7	Acces 70 70	ss	Act Cha	ion ange a	Statu Statu	2L	Res	et Pas et Pas	swore
Email	By Aaron Aaron	First Na son, Aar son, Erir I, Kathy	ame ron	Nam	ie 🔻									Type Active Active Active	e e	7 7 7	Acces 70 70 70	SS	Act Cha Cha	ion ange ange	Statu Statu Statu	21	Res Res Res	et Pas et Pas et Pas	ssword



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

Update	Aaron Aa Printable V	ronson 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	Dashboard	Member Design	nations	Friends	Bulletin Sub	scribers	Request Member	Update Nev	v Member Progran	n Download	Member Da	ta Search Member e	Directory			

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Active	e Meml	bers	Li	st																						
Member	s per Page	: 25	·																							
All A	ВС	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 New Memb	er
																									•	
Email	🗆 By Fi	rst Na	me	Nam	ne 🔻										Т	уре		1	Acces	ss	Act	ion				
٨	Aaronso	n, Aarc	on												A	ctive		7	70		Cha	inge	Statu	ls	Reset Passwor	rd
	Aaronso	n, Erin													A	ctive		7	70		Cha	inge	Statu	Is	Reset Passwor	rd
	Arnold, K	athy													A	ctive	•	7	70		Cha	inge	Statu	ıs	Reset Passwor	rd
	Bennett,	Norma	a												A	ctive		7	70		Cha	inge	Statu	IS	Reset Passwor	rd

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.					



Except in special cases, always choose *Report this termination to Rotary International*.



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

How do I access reports?

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

Admin My ClubRunne	r Communication	Bulletin New Bull	etin (Beta) Contac	ts Membership	Organization F	RI Integration	Attendance	Website	New Website (Beta)	Reports	Events Volu	nteers Help	
eDirectory Reports 2.0	eDirectory Builder 2.0	Club Dashboard	Years of Service	Age Distribution	Gender Distributio	on Rule of 85	Birthdays an	nd Anniversa	ries Login Activity	Downloa	ad 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

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



