

HOW TO INTEGRATE YOUR ROTARY CLUB WITH CLUBRUNNER THROUGH RI

A current Club Officer (President, Secretary, Treasurer) has the authority to integrate your club's RI account with Clubrunner.

If your club does not have an officer identified with RI, please email your club's name, club number and list of officers directly to: data@rotary.org

Once your officers are set up through Rotary International, you can integrate your club with Clubrunner

How To Integrate Your Club With Clubrunner:

Go to www.rotary.org

Click on "My Rotary" and sign in

Click on "Home" in the toolbar on the far right

Click on "My Club" and scroll down to Club Management Systems

Click on "Edit"; click on "Add Vendor"

Under Club Management Vendor, use the drop-down box to choose Clubrunner

Under Vendor Access Level, click the first option "View and Edit Access. Allow the vendor to view and edit your club data"

At the bottom right, click on "Certification" and then "I Agree"

For visual instructions, click on the link below:

<https://my-cms.rotary.org/en/document/how-choose-or-change-club-management-vendor>

WHY SHOULD A CLUB OFFICER SYNCHRONIZE/INTEGRATE THEIR CLUB?

1. When you enter or terminate a club member through Clubrunner, it will automatically sync with the RI club database. So you only have to enter the info at one site.
2. If you add or terminate a club member through www.rotary.org, it will *not* automatically sync with the Clubrunner database. Instead, you will have to manually add or delete the member through Clubrunner.
3. If you don't have a club Clubrunner account, you can still synchronize your club membership data with RI. Simply log in to the District Clubrunner account to set up the RI Synchronization.

HOW A CLUB OFFICER CAN UPDATE THEIR CLUB'S OFFICERS

Only a currently defined Club Officer (President, Secretary, Treasurer) has the authority to update their own club's officers through the District Clubrunner account. They can't edit other clubs.

To edit your club's current or incoming officers:

1. Go to District website at www.rotaryd5500.org and click on "Member Login" in the top right
2. Enter your login information. If this is the first time you are logging in, click on "New User?"

3. Click on “Member Area” on the top right
4. Click on “Club and Membership Detail” under “District, Clubs, & Management” on the right side
5. Scroll to your club and click “Executives”
6. Click on “Carry over Executive and Director Position to the New Year” on the bottom left
7. Click on the correct year in the top center
8. Click “Edit” for each position and add the correct member
9. Click on “Save” each time you update a club officer

That’s it! The positions will automatically update the RI database.

HOW MEMBERS CAN USE THE DISTRICT CLUBRUNNER ACCOUNT

All members in the District have login accounts in the Clubrunner system, even if their club does not subscribe to Clubrunner. Members simply use the District Clubrunner account to log in.

Once logged in, they can update their own membership information, send emails, etc.

How To Set Up A Clubrunner Account:

Go to: www.rotaryd5500.org and at the top right, click on **Member Login**

Click on **Forgot login name?**

Complete the questions with your Club name, Last Name, and Email address and click Submit

- If you’re not listed as a club member, email: logins@clubrunner.ca

An email will be sent to you with instructions on resetting your login name and password.

When you receive the email, click on **Reset Password Link**. You will be taken to a Reset page. Your Login will already be set by Clubrunner; *please make note of this Login information*. Enter and confirm your password and submit.

Once you’ve set up your password, you’ll receive a confirmation message. Click **Return** on the new page, enter your Login and Password.

You can now update your personal information, send emails, etc. For more information on how to use your Clubrunner account, **call 877-469-2582, option 2.**

For detailed instructions on how to set up a Clubrunner account, click on the link below:

<https://www.clubrunnersupport.com/kb/articles/how-do-i-retrieve-my-login-name-and-reset-my-password-district>