

The LARGEST misconception among Clubs today is thinking that entering members and officers in the Rotary International website will automatically update their Club database and automatically update the same info at the District level. **Nothing could further from the truth!** Adding a member or officer/executive at the RI website does NOT automatically upload this info to District. **Adding a member to your own club's ClubRunner does NOT automatically upload the information to RI or District UNLESS you follow these directions:**

Any club that uses ClubRunner **must first designate** a vendor (ie: ClubRunner) as their official "Management Vendor"; then give permission for that vendor to send membership information automatically to RI . If your club uses ClubRunner, information will also be uploaded automatically to District 7430 because they also use a ClubRunner platform). This is done simply by following a few steps. Once you've completed these steps, the next new member you add will be automatically updated in both the District and RI websites (same goes for club officer information).

Here's how to make sure your club's information is shared automatically (and almost instantly) with both District and RI (*for clubs using ClubRunner only*).

If your club does NOT use ClubRunner, but chooses a different approved "management Vendor", then your information can be uploaded to RI automatically, but will NOT be uploaded to District automatically. This is because District 7430 uses ClubRunner and it is NOT compatible with any other platform other than ClubRunner. *If you do not use ClubRunner, you will have to manually enter new member Officer information at the District site yourself.*

STEP 1

Login to My Rotary at the RI website (www.rotary.org)

Hover over MANAGE, hover over *Club & District Administration*, then click on *Club Administration*

From the club administration page, find and click on "UPDATE CLUB DATA" this is what that section looks like:

★ **Update Club Data**
Provide club contact information and choose club management providers.
[Update meeting details](#) | [Update mailing address and contact information](#) |
[Designate a club management vendor](#)

CLICK ON 'Designate a club management vendor'

- A page with all of your club's info will come up. Scroll all the way down to the section "Club Management Systems" and either EDIT or ADD a vendor

First, **your club must be a customer of a club management vendor**. Find a list of the vendors that provide database services on the **Club Management Systems & Website Providers** page of My Rotary. Then, your club can allow the vendor access to club members' personal data by choosing the appropriate option

Here is the link that will give you a list of approved vendors (including ClubRunner) and directions on how to add them:

<https://my.rotary.org/en/manage/community-marketplace/club-management-systems-website-vendors>

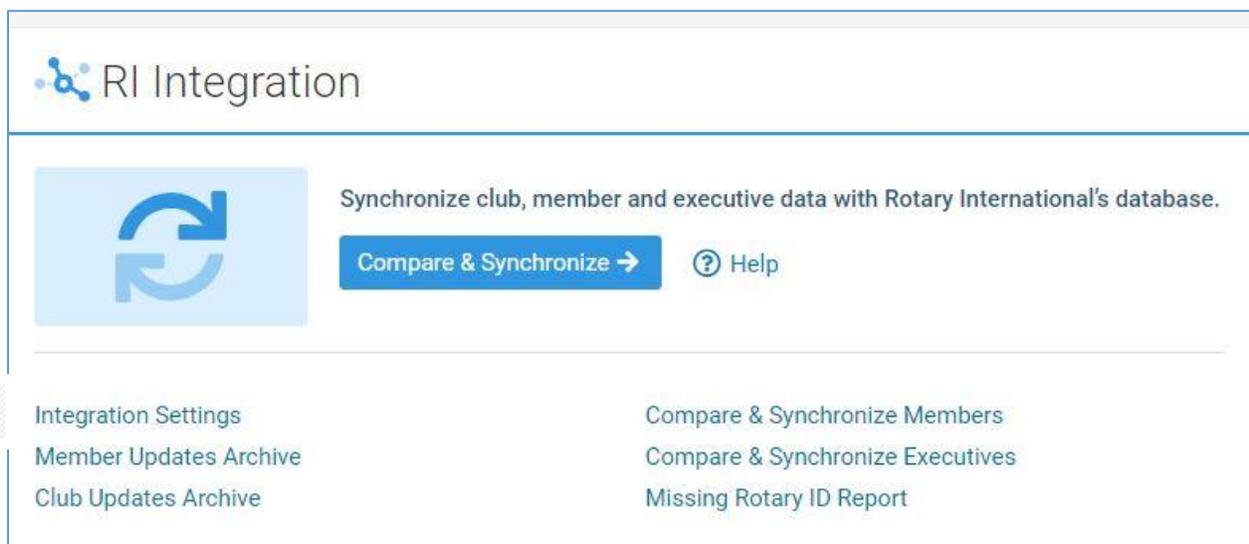
By using a club management system to link your club database directly to Rotary International's member database, you can:

- Spend less time on administrative tasks
- Easily send Rotary your club's latest member and officer information
- Be sure you'll receive an accurate invoice for Rotary International dues and fees
- Eliminate duplicate data entry

STEP 2

Go to your own club's **ClubRunner** website – login as a member like you usually do.

click MEMBER AREA, then scroll to **the RI INTEGRATION** section, click on **Integration Settings**



RI Integration

Synchronize club, member and executive data with Rotary International's database.

[Compare & Synchronize →](#) [? Help](#)

[Integration Settings](#) [Compare & Synchronize Members](#)

[Member Updates Archive](#) [Compare & Synchronize Executives](#)

[Club Updates Archive](#) [Missing Rotary ID Report](#)

The next page that comes up will tell you

RI Database Integration for {{ your club }}

Rotary Integration Settings

Using this feature, member data changes you make on ClubRunner will be automatically updated at Rotary International Headquarters within minutes

(**Step 1** - - you already did if you followed the directions on the first page of this document)

STEP 2: 24 HOURS AFTER FINISHING STEP 1, **opt in by selecting the checkbox below.** Note that this checkbox will only become available once you complete the above step and wait for the RI database to refresh which may take up to 24 hours.

(SAMPLE)

Switch on Data Integration between ClubRunner and RI for all active member records within my club.

Note that all members will now be set to opt into the fields the club has selected below. Any members who wish to opt out of specific fields can update their preferences under the Privacy tab of their profile.

I agree to the [Terms and Conditions](#) of this integration.

Integration confirmed on 2017-12-07 7:39:46 AM
by Tammy Skiermont

AFTER 24 HOURS – YOU SHOULD HAVE A GREEN BOX SHOW UP THAT LOOKS LIKE THIS:

RI Integration Status: Read & Update

ClubRunner can read and update Rotary International's database for your club.

BE SURE TO CHECK ALL BOXES!!!! It is important that RI receive ALL information on your members including DATE OF BIRTH (necessary for club statistics that your President Elect NEEDS to report to the Governor)

Choose Club RI Integration Privacy

- | | | |
|--|--|---|
| <input checked="" type="checkbox"/> Allow Name | <input checked="" type="checkbox"/> Allow Home Phone | <input checked="" type="checkbox"/> Allow Home Fax |
| <input checked="" type="checkbox"/> Allow Birthday | <input checked="" type="checkbox"/> Allow Cell Phone | <input checked="" type="checkbox"/> Allow Business Fax |
| <input checked="" type="checkbox"/> Allow Home Address | <input checked="" type="checkbox"/> Allow Business Phone | <input checked="" type="checkbox"/> Allow Primary Email |
| <input checked="" type="checkbox"/> Allow Business Address | | |

TO ENSURE THAT ROTARY INT'L HAS YOUR CLUB'S CURRENT AND INCOMING OFFICERS:

Go back to the RI Integration section, then click on **COMPARE AND SYNCHRONIZE EXECUTIVES**

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You can check to make sure that RI is receiving your information and it will show you a graph of what info is sent automatically to RI from ClubRunner, and what info is not sent. Sample below is of the North North Penn Club for 2017-2018 Rotary Year: (notice the ICON KEY at the bottom left)

Click on the icon in the center column to change how the data will be synchronized. When finished, click on the Synchronize button below.

<input type="checkbox"/>	Position	ClubRunner		Rotary International
<input type="checkbox"/>	Club President	Robert Kile	=	Robert Kile
<input type="checkbox"/>	Club Secretary	Tammy Skiermont	=	Tammy Skiermont
<input type="checkbox"/>	Club Treasurer	Kerry Kulp	=	Kerry Kulp
<input type="checkbox"/>	Club Foundation Chair	Scott Grande	=	Scott Grande
<input type="checkbox"/>	Club Executive Secretary/Director		←	Tammy Skiermont
<input type="checkbox"/>	Club Membership Chair	Tony Jannetta	=	Anthony Jannetta

[Synchronize Selected Position\(s\)](#)

Icon Key:

- = Data matches in ClubRunner & Rotary
- Push to Rotary International
- ← Pull data to ClubRunner

Red End Date Expired Position at Rotary International

The same process can be done for **individual member data** by clicking on COMPARE & SYNCHRONIZE MEMBERS (from the beginning of step 2 above)

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CLICK ON THE 'COMPARE' action to view individual member integration data:

Name ▾	ID ▾	CR Member Type ▾	RI Member Type ▾	Last Updated ▾	Actions
Bell, Jeffrey	8294893	Active	Member	Jan 02, 2022	Compare
Clifford, Thomas	10329163	Active	Member	Mar 05, 2022	Compare
Dolan, Peggy	9720823	Honorary	Honorary Member	Sep 14, 2016	Compare
Faltermayer, William	666831	Active	Member	Jul 03, 2015	Compare
Fowler, Les	9103829	Active	Member	Jun 10, 2018	Compare

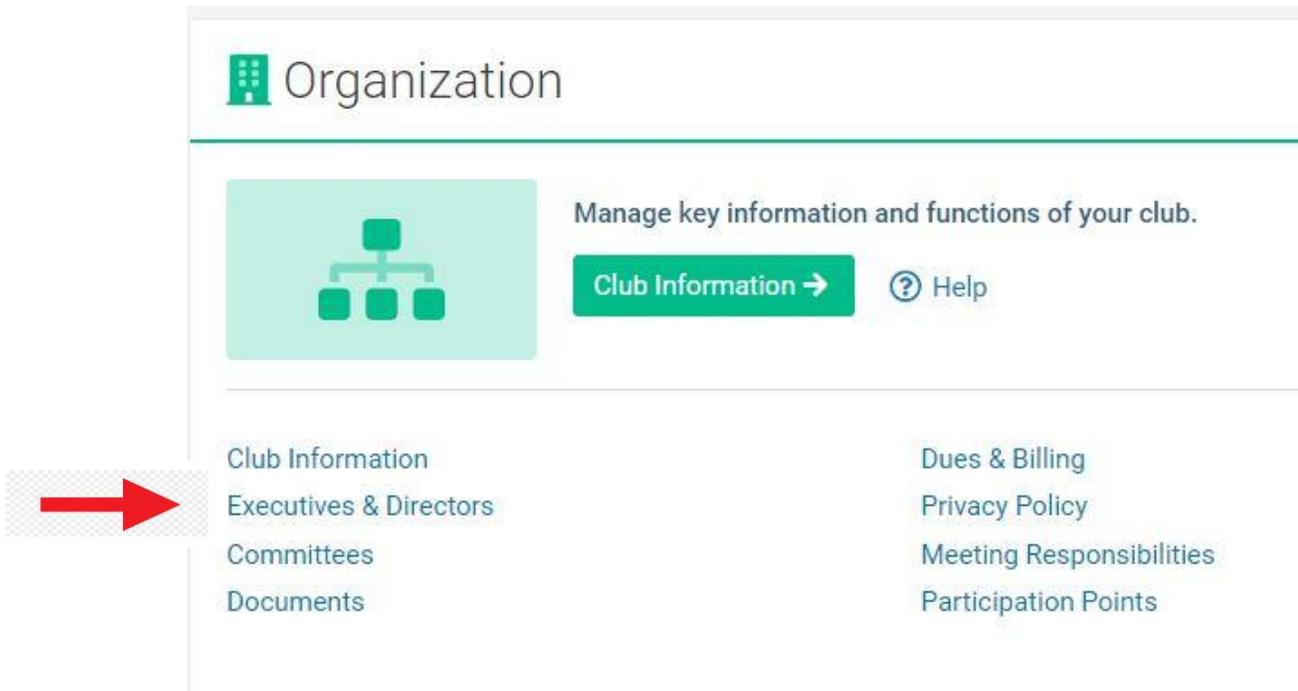


If the symbol next to each piece of data is NOT “ = “ then you must make a change either to pull data from RI to ClubRunner OR push from ClubRunner to RI

Keep in mind: *If a member changes their email address and you have entered that new information in the member's records in ClubRunner, it might not be updated to RI records, even if you 'push' that information to RI via integration. The reason for this is, if the member's email address is also their login ID to Rotary.org, then the email address **cannot be changed in club records until the member contacts Rotary Int'l directly.***

Updating / adding / changing EXECUTIVES & DIRECTORS

In your own club's ClubRunner site, go to the Administration page after logging in, scroll to the ORGANIZATION section and **click on "Executives & Directors"**



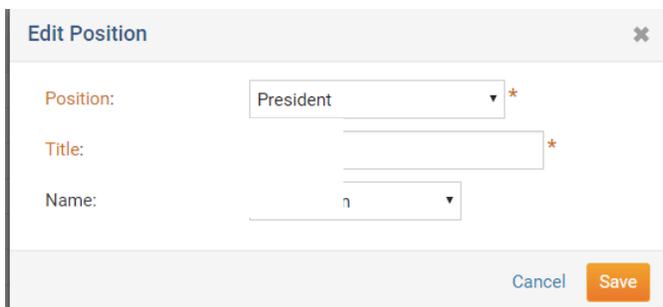
The screenshot shows the 'Organization' section of a ClubRunner site. At the top, there is a header with a grid icon and the word 'Organization'. Below this is a main content area with a tree icon and the text 'Manage key information and functions of your club.' A green button labeled 'Club Information →' and a 'Help' link are visible. A sidebar on the left contains several links: 'Club Information', 'Executives & Directors', 'Committees', and 'Documents'. A red arrow points to the 'Executives & Directors' link. To the right of the sidebar, there are additional links: 'Dues & Billing', 'Privacy Policy', 'Meeting Responsibilities', and 'Participation Points'.

Be sure to choose the CORRECT Rotary Year that you want to update



The screenshot shows a navigation bar for selecting a Rotary Year. It contains three elements: a left-pointing chevron followed by the text 'Previous Year', the text '2017-18' in the center, and a right-pointing chevron followed by the text 'Next Year'.

Simply EDIT the executive position, choose the member for that position and click SAVE



The screenshot shows a form titled 'Edit Position' with a close button (X) in the top right corner. The form has three fields: 'Position:' with a dropdown menu showing 'President' and an asterisk; 'Title:' with a text input field and an asterisk; and 'Name:' with a dropdown menu showing 'n' and an asterisk. At the bottom right of the form are two buttons: 'Cancel' and 'Save'.

YOUR OFFICER POSITIONS SHOULD ALL BE FILLED, AND ONCE YOU HAVE DONE SO, INFORMATION IS AUTOMATICALLY UPDATED IN BOTH DISTRICT & R.I. BECAUSE YOU HAVE CHOSEN CLUB RUNNER AS YOUR 'MANAGEMENT VENDOR' WAY BACK IN STEP 1 😊