

I. Introduction

1. General Overview

The Birthday and Anniversaries module is designed to allow clubs to generate a report to view the birthday and anniversary dates for members and their spouses.

II. Getting Started

2. Location

This report is included with the ClubRunner package and can be found by following the path below:

- Login to the Admin page
- Click on the “Reports (New!)” tab on the menu bar
- Click on “Birthdays and Anniversaries”



Please note, the Birthday & Anniversaries link will be disabled for members with access levels between 70 and 90 as you do need an access level of 60 or better.

[Birthdays and Anniversaries](#)

III. Functions

3. Birthdays & Anniversary Report

a) Generating the report

Birthday & Anniversary Report

Selection Criteria

Month

Entire Year

Categories:

Member Birthdays

Spouse Birthdays

Anniversaries

Join Date

Sort By:

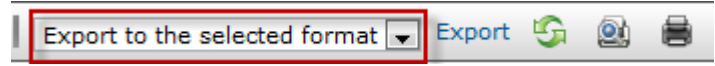
Name

Date

By default, the report will generate based on the current month. To create a custom report, you will need to:

- 1) Select the “Month” or “Entire Year” option
- 2) Select the applicable categories.
 - Member and/or spouse birthdays

- Anniversaries
- Join Date
- 3) Select the “Sort By” option
 - a. Name
 - b. Date
- 4) Generate Report



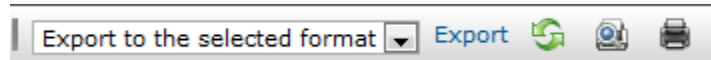
b) Results Report

ClubRunner Website Service		
Birthday & Anniversary Report		
Sorted By Name		
		
Member Birthdays		
Name	Date	
Perry, Katie	Sep 17	
Wohlfeld, Bruce	Sep 03	
Spouse Birthdays		
Name	Spouse Of	Date
No spouse birthdays found.		
Anniversaries		

The results report will display the name of the club, method of sorting, categories and date. This report can be printed or exported for your records.

c) Additional Functions

Other functions users can use are:



- Export
- Refresh
- Switch to print preview
- Print

d) Exporting the file

You can export the report to various formats:

- Click on “Export to the Selected “format”
- Select the file type
- Click on Export

PDF

ClubRunner Website Service
Birthday & Anniversary Report
Sorted By Name

Member Birthdays

Name	Date
Perry, Katie	Sep 17
Wohlfeld, Bruce	Sep 03

Spouse Birthdays

Name	Spouse Of	Date
No spouse birthdays found.		

Anniversaries

Name	Spouse Name	Years	Date
No anniversaries found.			

Join Date

Name	Years	Date
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Excel Spreadsheet

ClubRunner Website Service
Birthday & Anniversary Report
Sorted By Name

Member Birthdays

Name	Date
Perry, Katie	Sep 17
Wohlfeld, Bruce	Sep 03

Spouse Birthdays

Name	Spouse Of	Date
No spouse birthdays found.		

Anniversaries

Name	Spouse Name	Years	Date
No anniversaries found.			

Join Date

Name	Years	Date
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ii. Support & Training

Visit our **Support Center** at <http://clubrunner.helpserve.com> to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful “how-to” documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

<p style="text-align: center;"><u>Knowledgebase</u></p> <p>This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.</p>	<p style="text-align: center;"><u>Downloads</u></p> <p>This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.</p>
<p style="text-align: center;"><u>On-Demand Videos</u></p> <p>For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.</p>	<p style="text-align: center;"><u>Webinar Training</u></p> <p>We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend.</p>
<p style="text-align: center;"><u>Submit a Ticket</u></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to support@clubrunner.ca. Our turnaround time for email tickets is 2 business days.</p>	<p style="text-align: center;"><u>Community</u></p> <p>Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.</p>

For the latest ClubRunner updates, follow us on:

