

ClubRunner Essentials

Learn to use some of the fundamental sections of ClubRunner

What is ClubRunner?

ClubRunner is a cloud-based software service 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 over 20 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.

How do I log in?

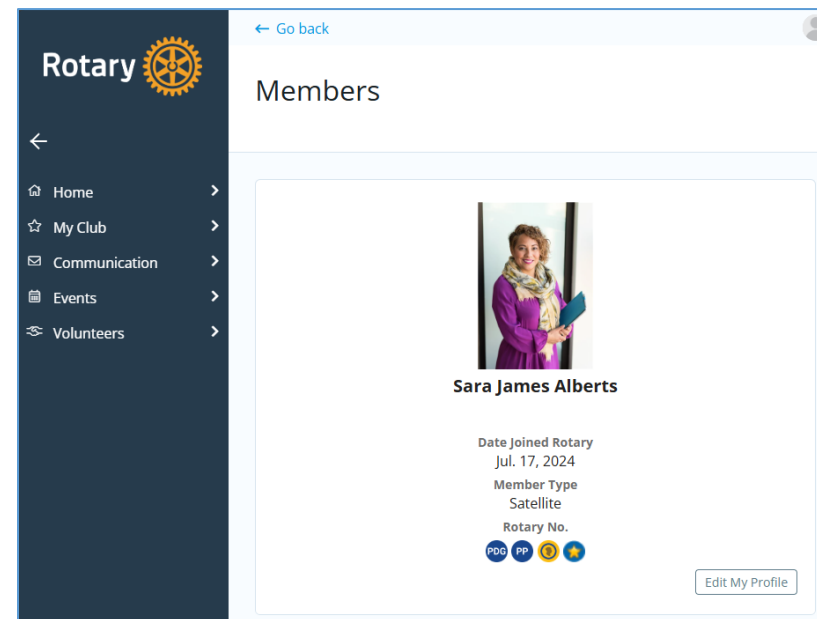
1 At the top right-hand corner of clubrunner.ca, click the 'Log In' button:



2 If you don't know your login credentials, click "Forgot Username?" or "Forgot Password?" and follow the steps to reset them.

A screenshot of the 'Welcome!' login page. The page has a white background with a blue border. At the top, the word 'Welcome!' is written in a large, bold, blue font. Below it, the text 'Login to your account' is centered. There are two input fields: 'Username' and 'Password'. To the right of each field is a link: 'Forgot username?' and 'Forgot password?'. Below the password field is a checkbox labeled 'Keep me logged in' which is checked. A blue 'Login' button is positioned below the checkbox. Below the 'Login' button is the text 'OR' centered. At the bottom, there is a purple button that says 'Send me a Magic Link' with a small icon of a key.

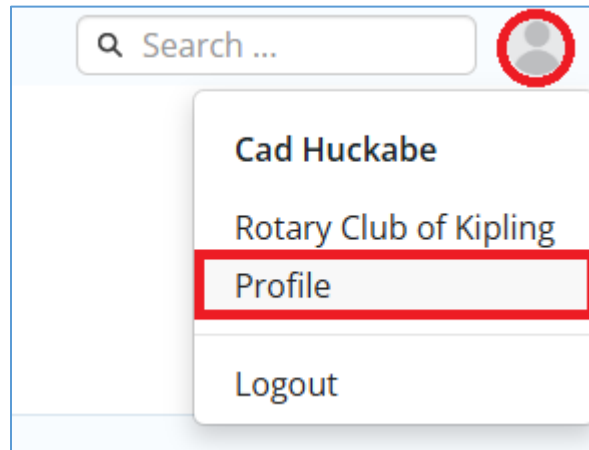
3 Follow the on-screen steps and you will be directed to the Members Area of your club.



How do edit my profile?

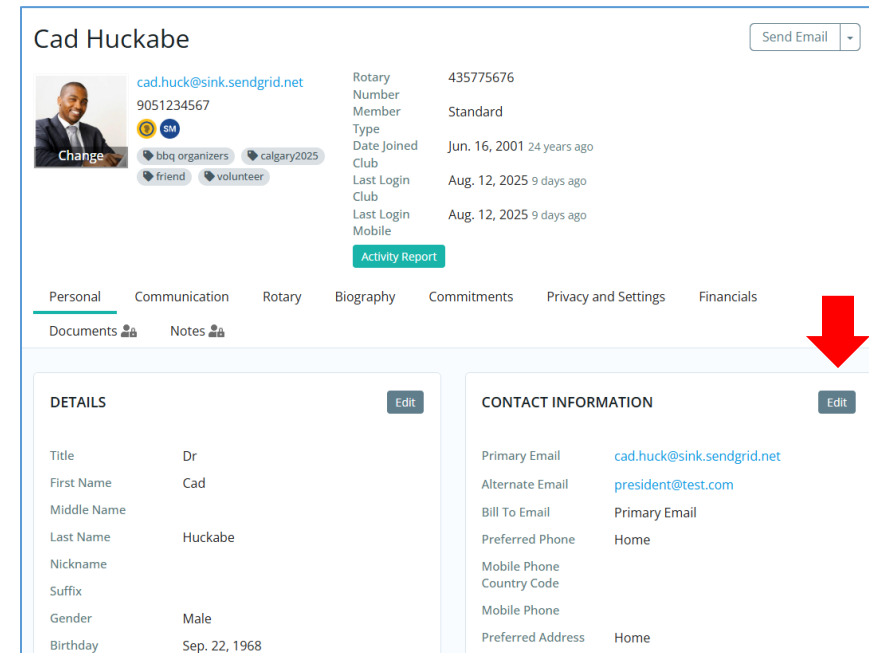
1

In the top right-hand corner of the Members Area, click your profile icon and then click **Profile**.



2

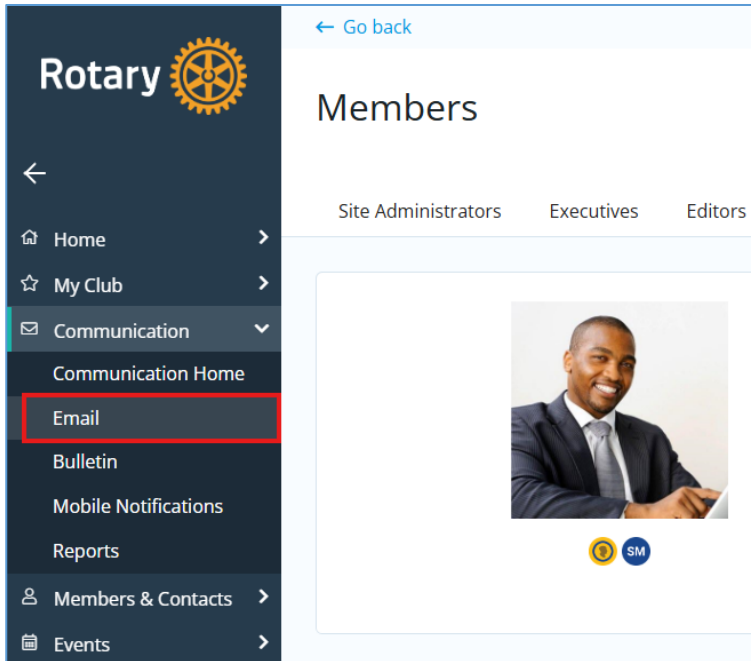
Inside your profile, below your photo, there are several tabs such as: **Personal | Rotary | Biography | etc.** Select any of these tabs. These tabs contain all the different sections of your profile you can edit. Click the **Edit** button to edit your information.



How do I send email?

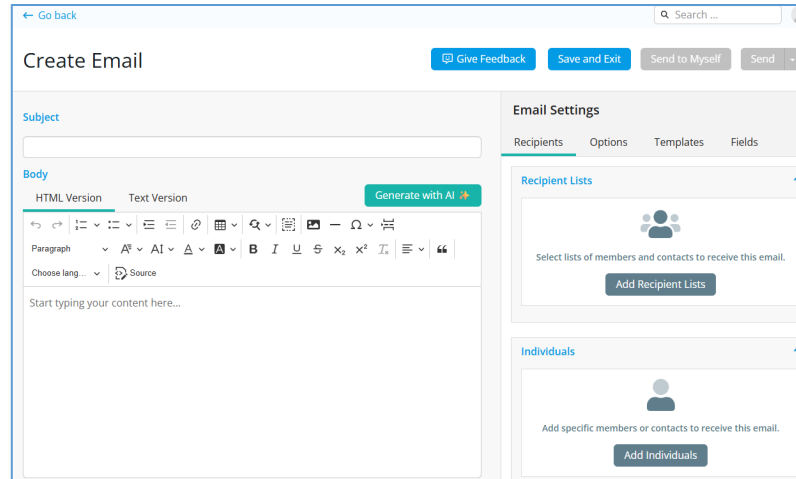
1

Along the left-hand menu click:
Communication > Email, then
Compose new message.



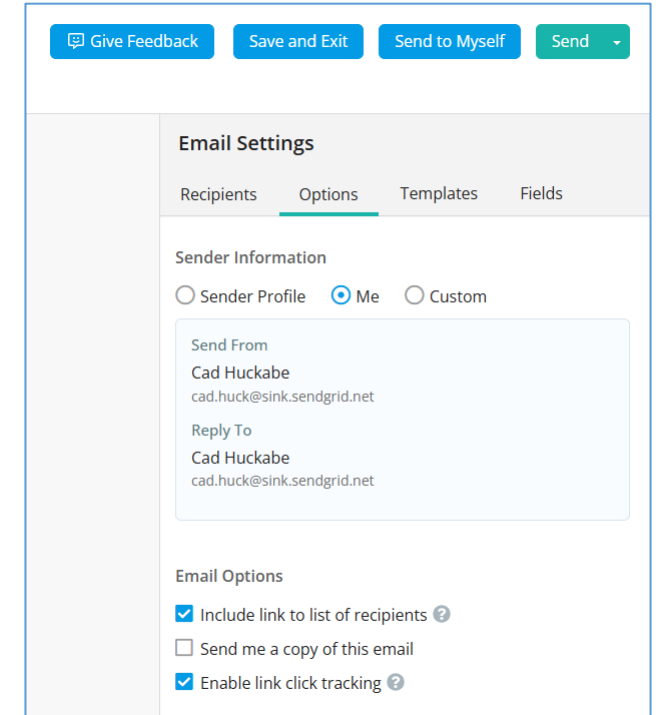
2

Step 1 = compose the subject and body of email
Step 2 = add attachment if necessary



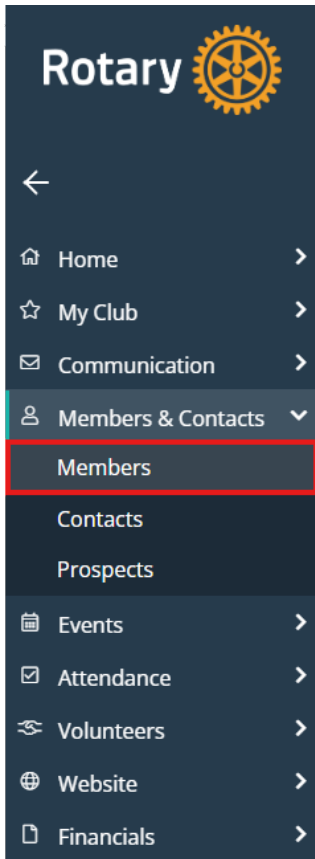
3

Step 3 = select a list of recipients; cc yourself
Step 4 = edit options like sender profiles
Step 5 = send now, or schedule email for later

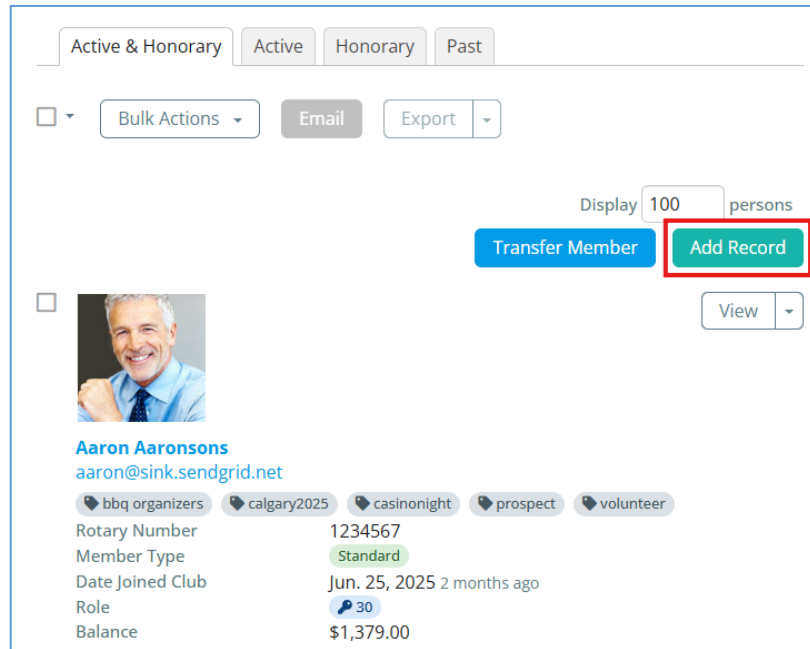


How do I add a new member?

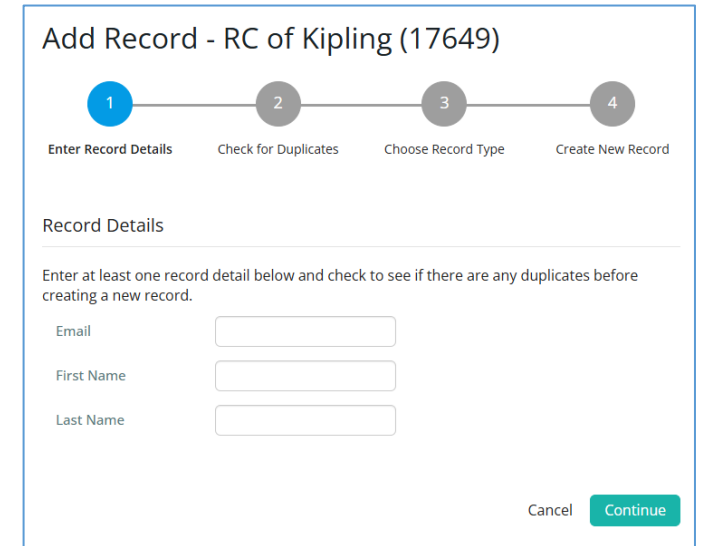
1 Along the left-hand menu navigation, click **Members & Contacts > Members**:



2 Click the **Add Record** button above the list of member records.



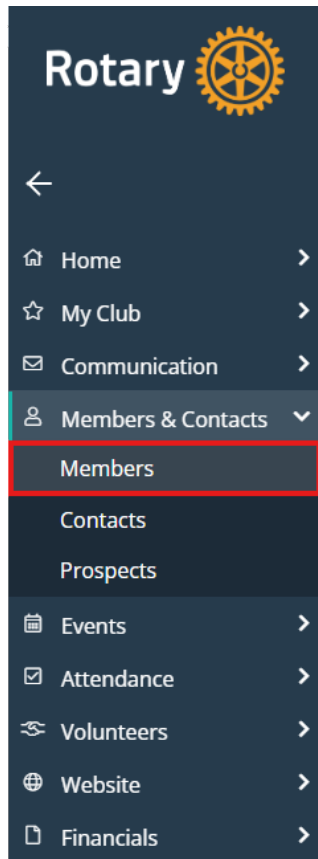
3 Follow the prompts to fill in all appropriate information. Fields marked with a **blue asterisk *** are required.



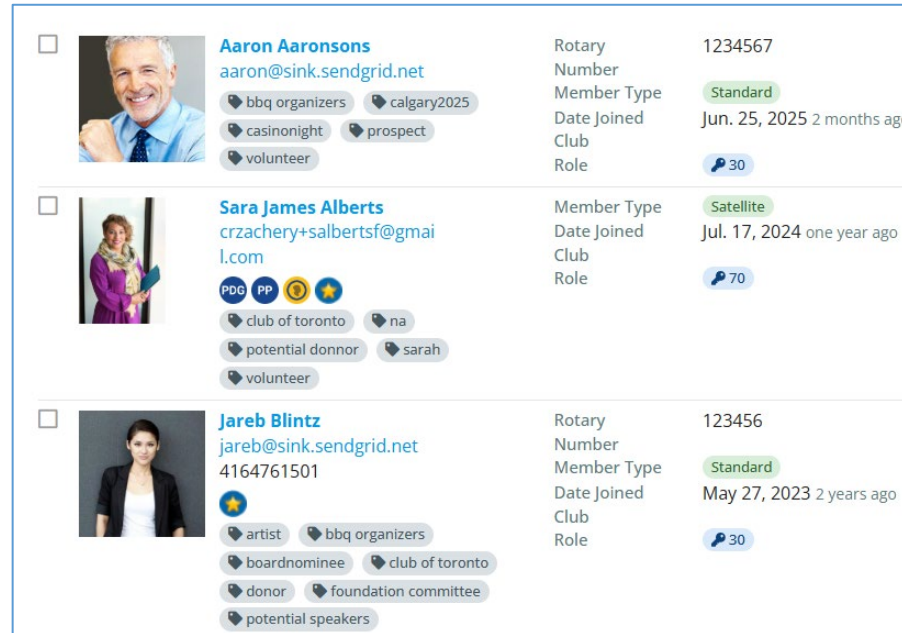
Note that these are the minimum required fields, you can input more information later.

How do I edit an existing member?

1 Along the left-hand menu navigation, click **Members & Contacts > Members**:

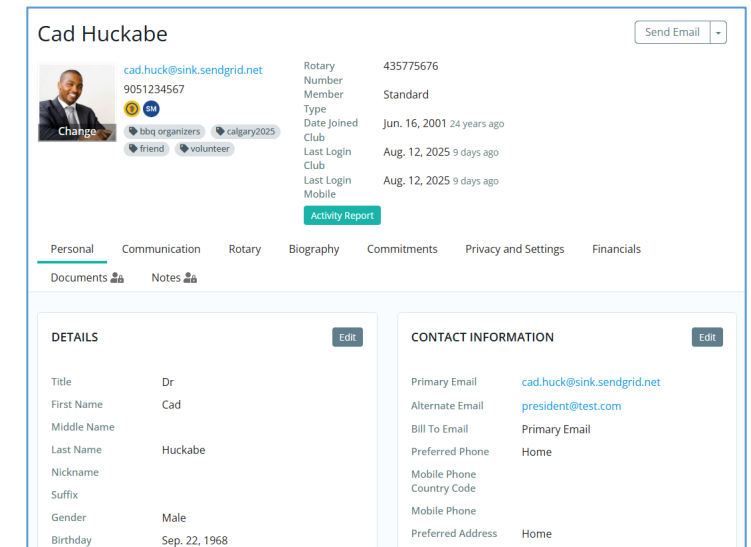


2 Click on any member's name.



Note: on the club website only members with access levels of 50, 40 and 30 can edit other member profiles.

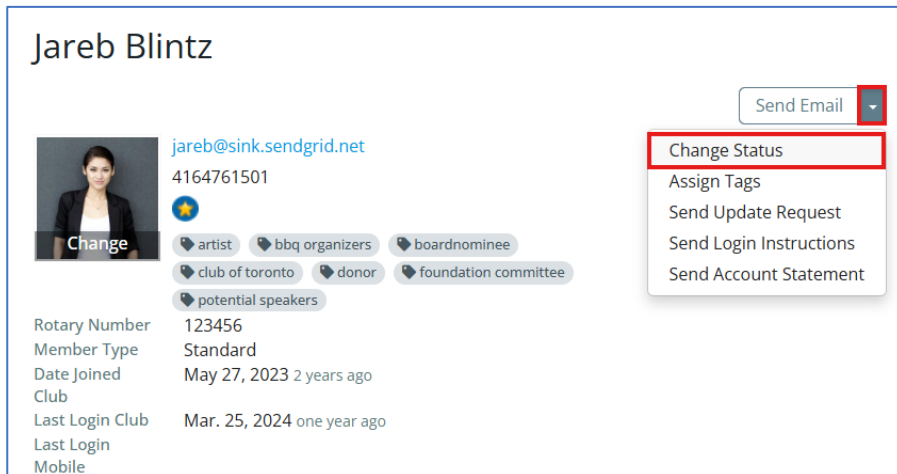
3 This takes you to the member's profile. Change any information by clicking the **Edit** buttons.



How do I terminate a member?

1 Navigate to a member's profile.

2 Click the **drop-down arrow** in the top right-hand corner of the page, then click **Change Status**.



Jareb Blintz

Send Email

Change Status

Assign Tags

Send Update Request

Send Login Instructions

Send Account Statement

Change

artist bbq organizers boardnominee club of toronto donor foundation committee potential speakers

Rotary Number 123456

Member Type Standard

Date Joined May 27, 2023 2 years ago

Club

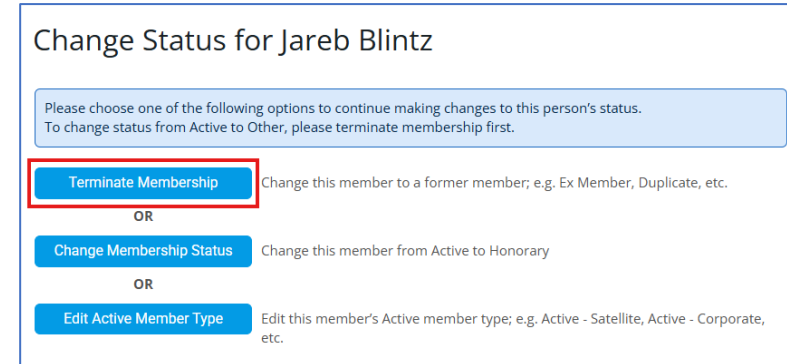
Last Login Club Mar. 25, 2024 one year ago

Last Login

Mobile

3

On the Change Status screen, click **Terminate Membership**.



Change Status for Jareb Blintz

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

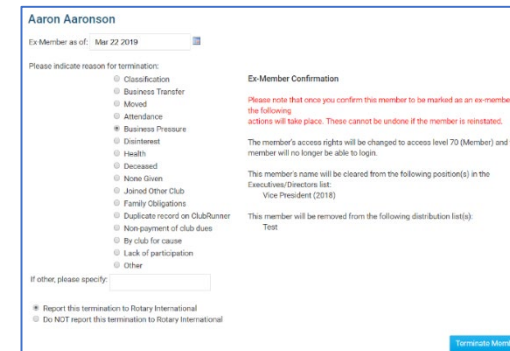
OR

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
- Dismissed
- Health
- Deceased
- Name 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: _____

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

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

Terminate Member

How do I access reports?

Along the left-hand menu navigation, click **Reports & Analytics** to reveal the report options 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*

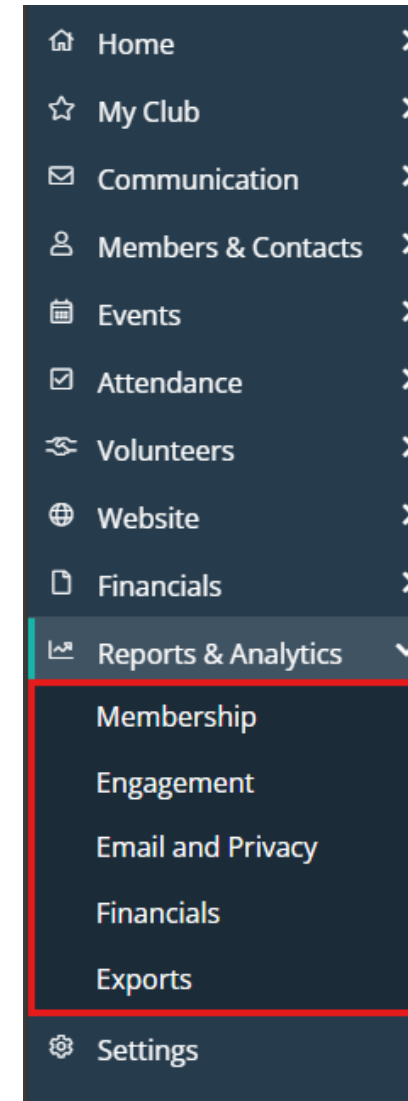
Birthdays & Anniversaries - member and spouse birthdays and anniversaries

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



Help Resources

www.ClubRunnerSupport.com

support@clubrunner.ca

1-877-469-2582