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.
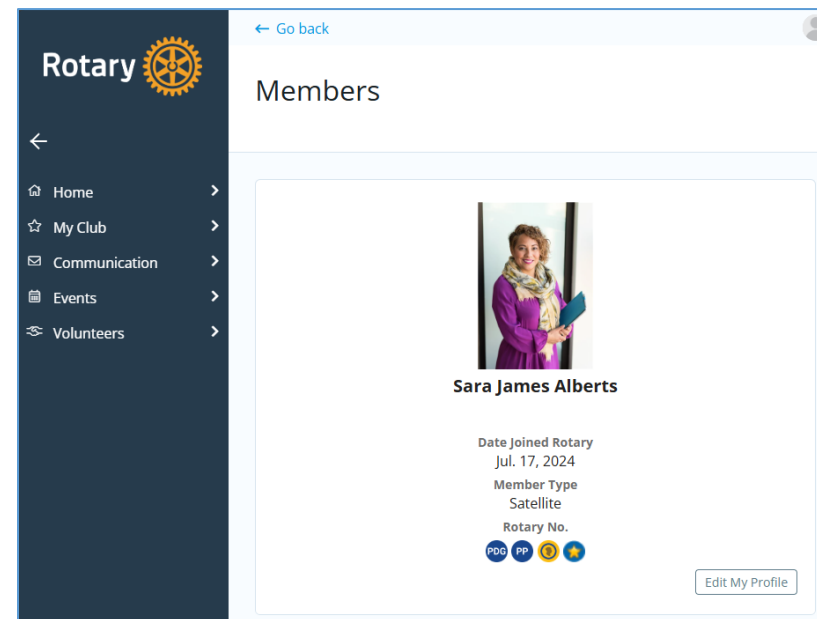
How do I log in?

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.
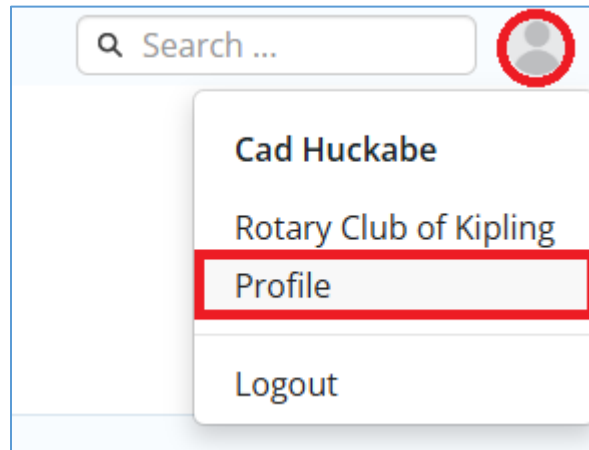

3 Follow the on-screen steps and you will be directed to the Members Area of your club.

How do edit my profile?

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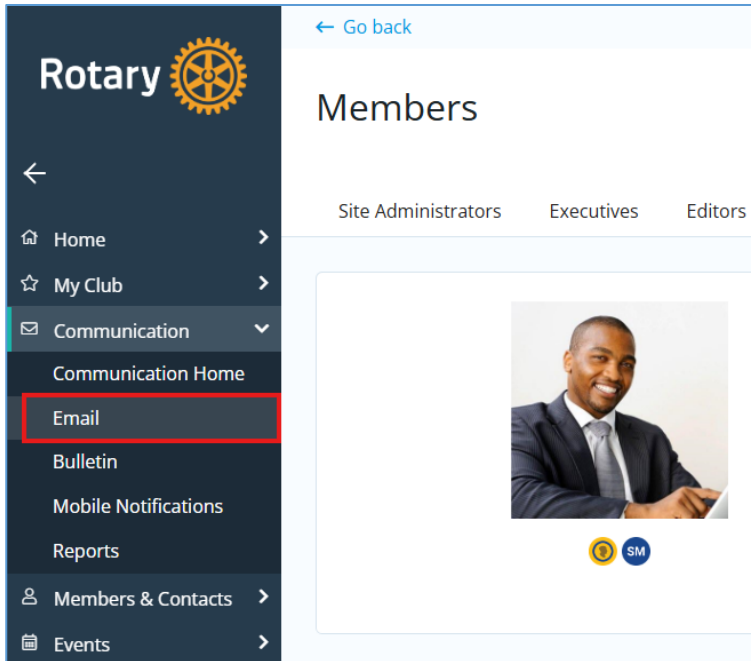

2 Inside your profile, below your photo, there are several tabs such as: **Personal | Rotary | Biography | etc.** Select any of these tabs. These tabs contain all the different sections of your profile you can edit. Click the **Edit** button to edit your information.
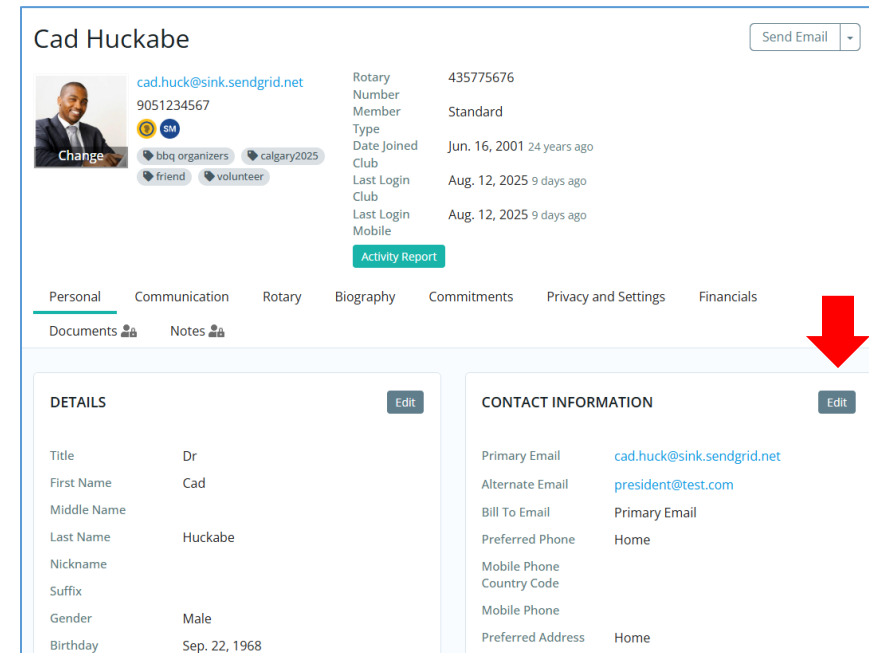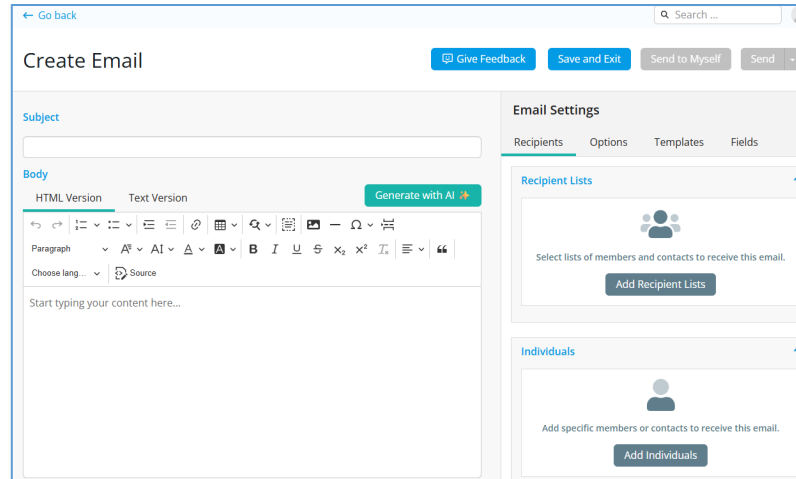
How do I send email?

1

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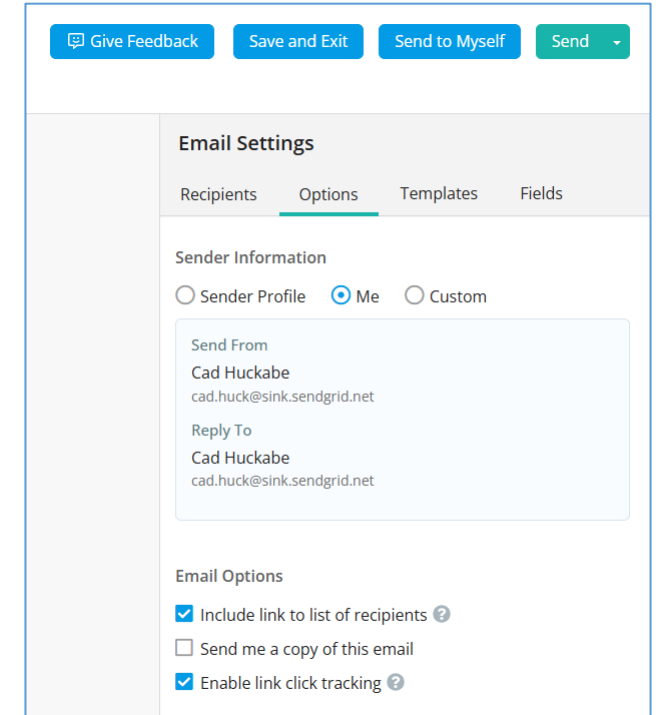**Compose new message**.

2

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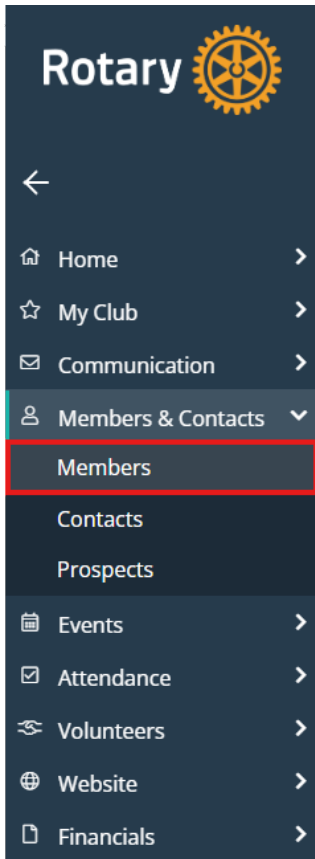**Step 2** = add attachment if necessary

3

Step 3 = select a list of recipients; cc yourself
Step 4 = edit options like sender profiles
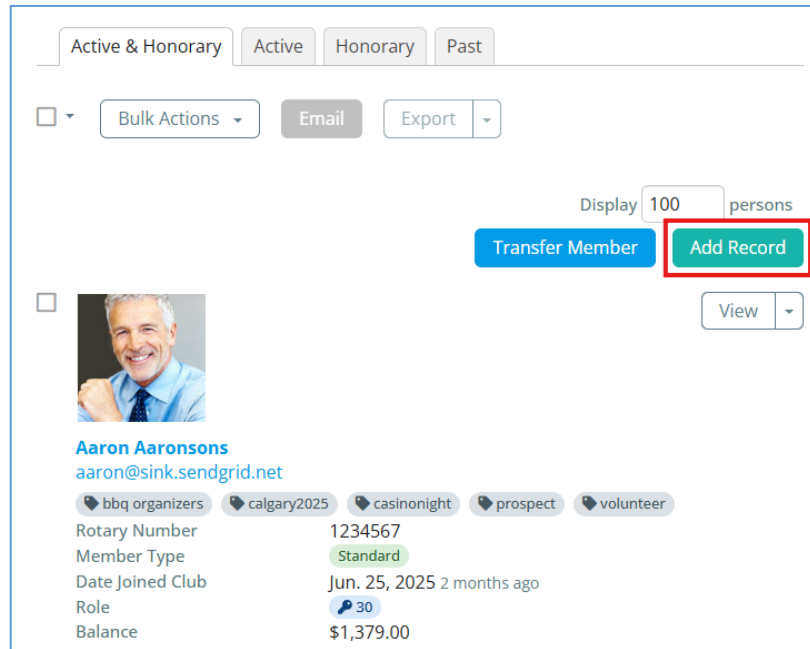**Step 5** = send now, or schedule email for later
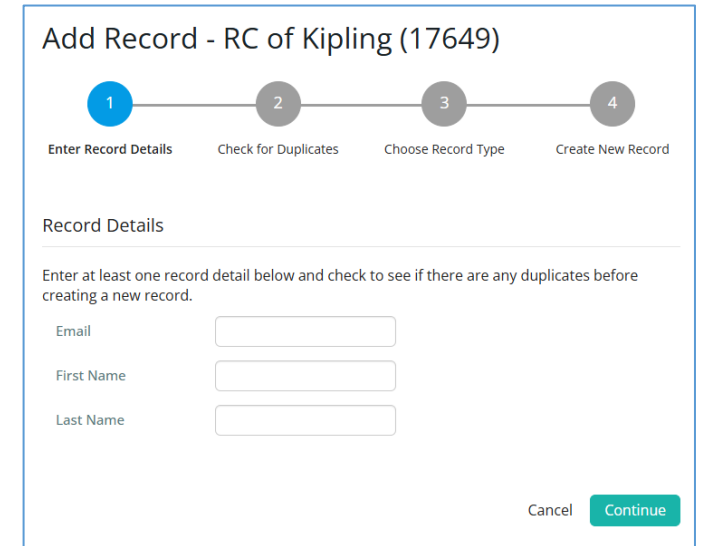
How do I add a new member?

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

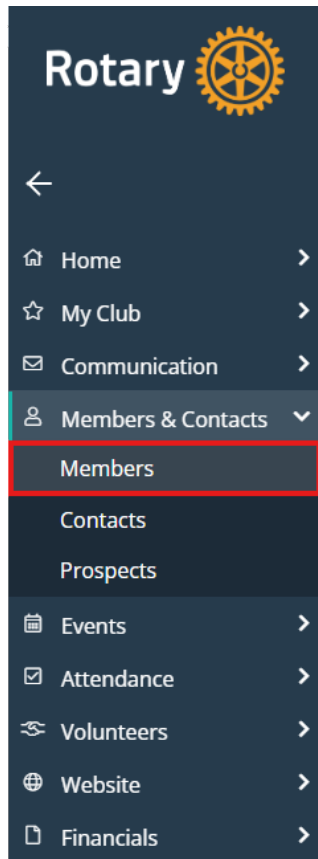**2** Click the **Add Record** button above the list of member records.

3 Follow the prompts to fill in all appropriate information. Fields marked with a **blue asterisk *** are required.
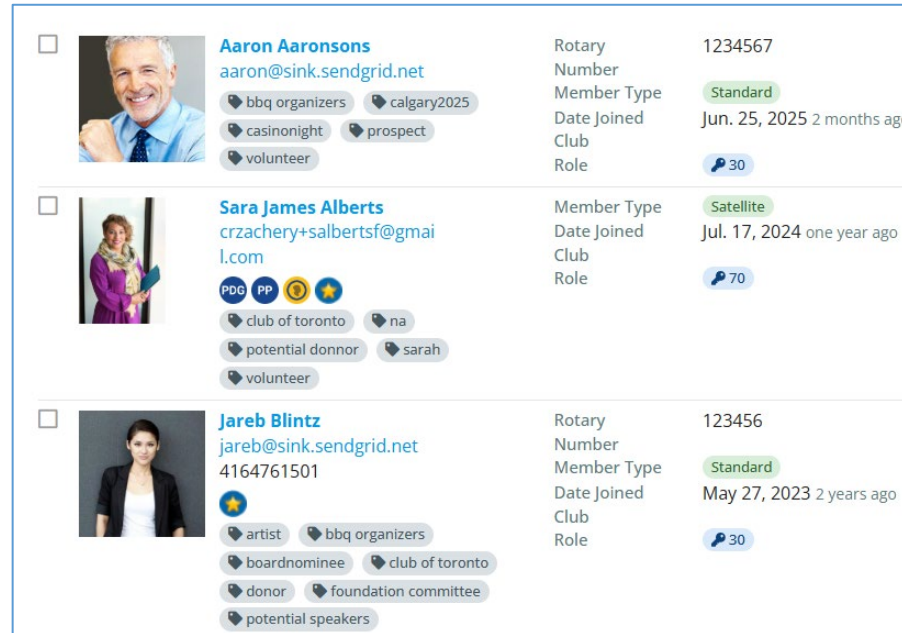
Note that these are the minimum required fields, you can input more information later.

How do I edit an existing member?

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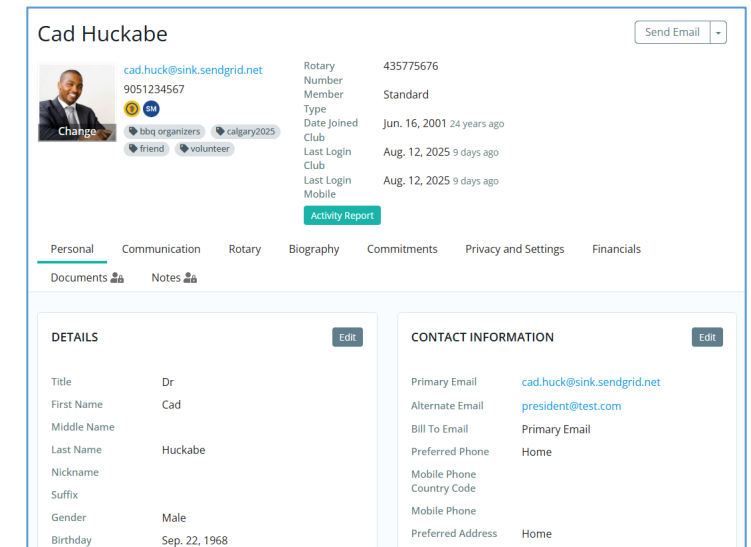

2 Click on any member's name.

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

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

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**.
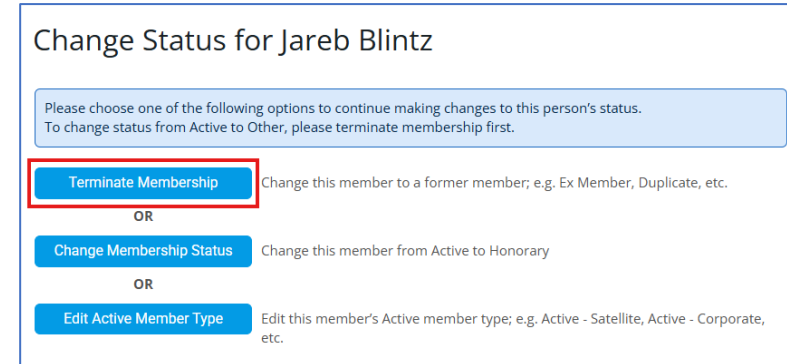
3 On the Change Status screen, click **Terminate Membership.**
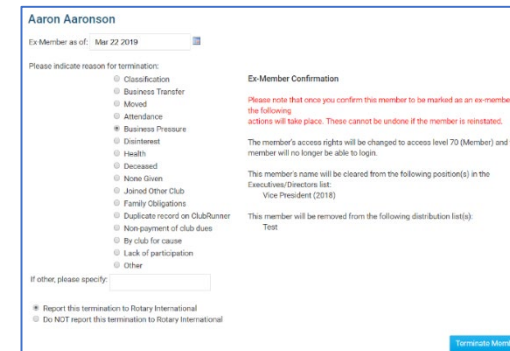
4 You must choose a reason for termination to activate the blue **Terminate Member** button.

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

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*
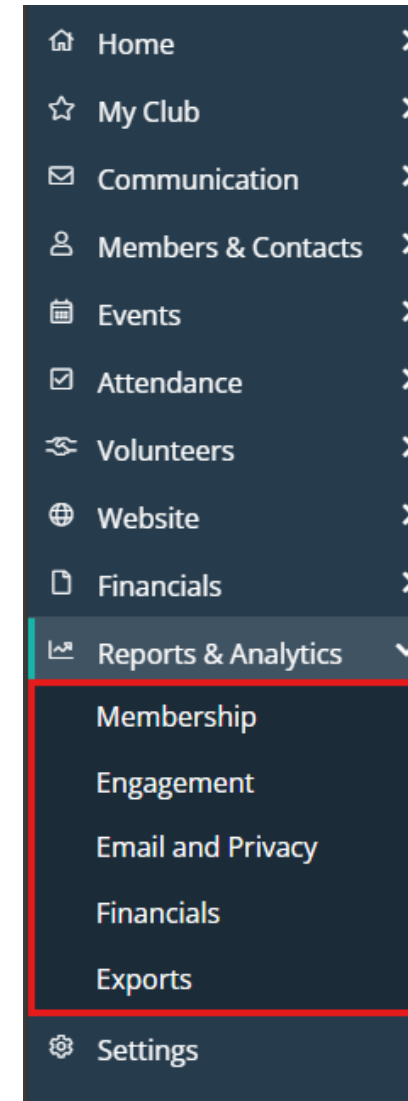
Birthdays & Anniversaries - member and spouse birthdays and anniversaries

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

Home
My Club
Communication
Members & Contacts
Events
Attendance
Volunteers
Website
Financials
Reports & Analytics
Membership
Engagement
Email and Privacy
Financials
Exports
Settings

Help Resources

www.ClubRunnerSupport.com

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1-877-469-2582