ClubRunner

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How do I add a member / contact?

Ryan A. - 2025-04-30 - Members & Contacts

When you recruit a new member, or discover an active member is missing from your database, you can use ClubRunner to add a new member to your Member List. You can add non-member contacts for your club as well. This article goes over the process to add new member and contact records.

- You will first need to log in to your ClubRunner account. You can do this from your club home page, or using our universal login page here: <u>https://site.clubrunner.ca/login</u>
- Once inside of the account, look in the left-hand side menu and click Members & Contacts, then select Members or Contacts, either will allow you to access the option to add a new user record.
- 3. From the Members or Contact list, to add a new user record click the **Add Record** button just below the search filters on the right-hand side of the page.

Active & Honorary Active Honorary Past	
Bulk Actions Email Export	Display 100 persons
	Transfer Member Add Record

4. You will now be taken through the steps to add a new record. The first step is to enter in the basic details of the member or contact you're adding. You are required to enter data in at least one of the fields: Email, First Name, and Last Name. Click **Continue** when you're done this.

Record Details	
Enter at least one record d	letail below and check to see if there are any duplicates before creating a new record.
Email	
First Name	
Last Name	



5. The system will search your members and contacts to make sure there aren't any existing records that match the data you provided.

If duplicate records are found that share the same email address, you can choose to

edit one of the existing profiles, change the member status, or add a non-member to your club. These actions are done via the **Actions** drop-down beside each duplicate match, or the **Edit Found Record** button if only a single duplicate was found.

Duplicate Records Check

A record with please enter a	this email exists. If a different email and	it matches your intended record, you n d confirm it for accuracy.	nay choose to	edit it; othe	rwise,
FIRST NAME	LAST NAME	EMAIL	RECORD	ТҮРЕ	ACTIONS
Ray	Burrell	ray.burrell@sink.sendgrid.net	Active		-
				🖋 Edit P 🖋 Chang	rofile ge Status
		Cancel Check fo	r Duplicates	Edit Fo	und Record

If records that potentially match the name you entered are found, you are presented with a list so you can be sure the person you're adding isn't already present in the account. You can choose to edit an existing record, or click the **Continue** button to proceed to add the new user record.

Duplicate Records Check

Multiple records with this name exist. Please review the list to see if your intended record is already present. If a match is found, you may choose to edit it; otherwise, you may continue to add a new record.				
Q Search				
FIRST NAME	LAST NAME	EMAIL	RECORD TYPE	ACTIONS
Jack	Reacher		Person	-
Jacky	Abbatini	Jacky-Abbatini@sink.sendgrid.net	Person	-
Showing all 2 rec	ords			



 You will now select the type of record to add: Member, Contact, Other User, or Past Member. Click the **Continue** button to proceed once you've selected the type of record to add.

Record Type Select a Record Type from the o and data configurations, so choo	ptions below to specify the type of Rec use the one that best fits your needs.	cord you would like to create. Each re	cord type provides specific settings
Member Construction of the second sec	Contact O An individual whose information is stored for communication or networking purposes.	Other User O A user with limited access, distinct from members and contacts.	Past Member O An individual who was previously a registered member but no longer holds an active membership.



 When adding a member you'll now enter their membership type, sponsor, Rotary member number, club join date, and if you want to report them to Rotary International or not.

Membership Type *	Active ~	
Sponsor	N/A ~ ?	
Rotary Member No.		
Date Joined Club *	Apr 22, 2025 💼	
Integration Options	 Report this new member to Rotary International Do NOT report this new member to Rotary International 	

Rotary Information and Integration

Notes for Rotary & Rotaract Clubs

Rotary International requires that the Date Joined Club must be within the last 30 days. This date cannot be in the future, only the current date or earlier.

When choosing not to integrate the new member, we will also not search for matching members at Rotary International.

8. Next you'll enter the demographic details for the user record. *Fields with an asterisk are required.*

When adding a member:



Member Details

When adding a contact:

Details	
Profile Photo	Select Image For Upload
Title	
First Name *	Jack
Nick Name	
Middle Name	
Last Name *	Shephard
Suffix	Select One 🗸
Email Primary	jack.shephard@sink.senc
Tags	•

9. When adding a member you'll now enter the address information for the user record. *Fields with an asterisk are required.*

Address	
Preferred Address	Home O Work
Address Line 1 *	
Address Line 2	
City *	
Country *	Canada ~
Province/Territory:*	Ontario ~
Postal Code *	

Note

The preferred address setting controls which address type you are entering. You can only enter a single address when adding a new member.

10. Next, when adding a club member, you will see the ClubRunner Account details. You

will see the member's automatically-generated login details which can be changed, and you may also choose to send a welcome email to the new member.

ClubRunner Account

Username *	First.Last.18026
Temporary Password *	буz186р6wp
Send email notification to this member?	System V Welcome New Member V

11. If you are adding a contact you'll need to confirm that you have consent from the individual to collect and store their information.

Consent			
	☐ I have received conser storage, and use of the Policy. They understar out at any time. A noti the first time their con	at from this individual for the collect eir information as described in our id that they may receive emails, an fication email will be sent to the ind tact information is stored. *	tion, Privacy d can opt lividual
Please state how you received consent *			
		Cancel	Save

12. When you have everything ready, click the **Add Member** or **Save** button at the bottom of the page to finalize the addition of the new user record.