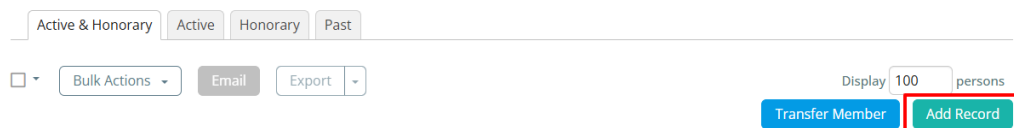


[NOVA] How do I add a member / contact?

Ryan A. - 2025-08-26 - [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.

1. 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: <https://site.clubrunner.ca/login>
2. 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.

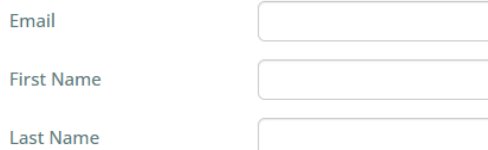


The screenshot shows a web interface with a horizontal filter bar containing buttons for 'Active & Honorary', 'Active', 'Honorary', and 'Past'. Below this is a row of controls including a checkbox, a 'Bulk Actions' dropdown, an 'Email' button, and an 'Export' dropdown. On the right side, there is a 'Display' section with a value of '100' and the unit 'persons'. At the bottom right, there are two buttons: 'Transfer Member' and 'Add Record'. The 'Add Record' button is highlighted with a red rectangular box.

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 detail below and check to see if there are any duplicates before creating a new record.



The form contains three input fields stacked vertically. The first field is labeled 'Email', the second 'First Name', and the third 'Last Name'. Each label is positioned to the left of its corresponding text input box.

Cancel [Continue](#)

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 this email exists. If it matches your intended record, you may choose to edit it; otherwise, please enter a different email and confirm it for accuracy.

FIRST NAME	LAST NAME	EMAIL	RECORD TYPE	ACTIONS
Ray	Burrell	ray.burrell@sink.sendgrid.net	Active	<div><div>Edit Profile</div><div>Change Status</div></div>

Cancel

Check for Duplicates

Edit Found 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 records

Cancel

Check for Duplicates

Continue

6. 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 options below to specify the type of Record you would like to create. Each record type provides specific settings and data configurations, so choose the one that best fits your needs.

Member

A registered user with full access to all member benefits and resources.

Contact

An individual whose information is stored for communication or networking purposes.

Other User

A user with limited access, distinct from members and contacts.

Past Member

An individual who was previously a registered member but no longer holds an active membership.

Cancel

Continue

7. 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.

Rotary Information and Integration

Membership Type *	<div>Active</div>
Sponsor	<div>N/A</div> ?
Rotary Member No.	<div></div>
Date Joined Club *	<div>Apr 22, 2025</div>
Integration Options	<div><div><input type="radio"/> Report this new member to Rotary International</div><div><input checked="" type="radio"/> Do NOT report this new member to Rotary International</div></div>

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

Title	<div></div>
First Name *	<div></div>
Middle Name	<div></div>
Last Name *	<div></div>
Suffix	<div></div>
Email	<div></div>
Gender *	<div></div>

When adding a contact:

Details

Profile Photo	<button>Select Image For Upload</button>
Title	<input type="text"/>
First Name *	<input type="text" value="Jack"/>
Nick Name	<input type="text"/>
Middle Name	<input type="text"/>
Last Name *	<input type="text" value="Shephard"/>
Suffix	<input type="text" value="-- Select One --"/>
Email Primary	<input type="text" value="jack.shephard@sink.senc"/>
Tags	<input type="text"/>

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	<input checked="" type="radio"/> Home <input type="radio"/> Work
Address Line 1 *	<input type="text"/>
Address Line 2	<input type="text"/>
City *	<input type="text"/>
Country *	<input type="text" value="Canada"/>
Province/Territory:*	<input type="text" value="Ontario"/>
Postal Code *	<input type="text"/>

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 *

6yz186p6wp

Send email notification to this member?



System ▾

Welcome New Member ▾

Add Member

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 consent from this individual for the collection, storage, and use of their information as described in our Privacy Policy. They understand that they may receive emails, and can opt out at any time. A notification email will be sent to the individual the first time their contact information is stored. *

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.