

ClubRunner

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How do I add a new member?

Michael C. - 2021-03-31 - Membership Management

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**. This guide covers both our new Add Member form, and our Classic Add member form.

Add Member







1. To access the **Member List** feature, you must go to your Club homepage and log in. Then, click on **Member Area** near the top right of the page.
2. Along the top of the screen you will see several tabs. Click on the **Membership** tab.
3. Now, click on **Member Lists**.
4. You are now on the Active Members List page, where you can browse a list of all currently active members.

Active Members List

Members per Page: 25 ▾

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

[Transfer New Member](#) [Add New Member](#)

Email	<input type="checkbox"/> By First Name	Name ▲	Type	Access	Action
		Aaronson, Aaron	Active	30	Change Status Reset Password
		Adams, Sarah	Honorary	40	Change Status Reset Password
		Barnes, Steve	Honorary	60	Change Status Reset Password
		Bennett, Shawn	Active	70	Change Status Reset Password
		Boyd, Pam	Active	70	Change Status Reset Password
		Burke, Carol	Active	70	Change Status Reset Password
		Burke, Martin	Honorary	70	Change Status Reset Password
		Carpenter, Phyllis	Active	70	Change Status Reset Password







5. To add a new member, simply click the **Add New Member** link at the top right side of your active member list.

Active Members List

Members per Page: 25 ▾

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Transfer New Member Add New Member

Email	<input type="checkbox"/> By First Name	Name ▲	Type	Access	Action
		Aaronson, Aaron	Active	30	Change Status Reset Password
		Adams, Sarah	Honorary	40	Change Status Reset Password
		Barnes, Steve	Honorary	60	Change Status Reset Password
		Bennett, Shawn	Active	70	Change Status Reset Password
		Boyd, Pam	Active	70	Change Status Reset Password
		Burke, Carol	Active	70	Change Status Reset Password
		Burke, Martin	Honorary	70	Change Status Reset Password
		Carpenter, Phyllis	Active	70	Change Status Reset Password

6. You are now on the **New Member** page, where you can enter the members details.
7. First you will enter the new members club details, such as: the type of membership, their sponsor, member number, the date that they're joining the club, and for Rotary customers if this members addition should be integrated with Rotary International.

Rotary Information and Integration

Membership Type *

Sponsor ?

Rotary Member No.

Date Joined Club *

Integration Options Report this new member to Rotary International
 Do NOT report this new member to Rotary International

Notes for Rotary Clubs:

- Rotary International requires that the **Date Joined Club** must be within the last 30 days. *Note that 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 will setup the member's personal details like their name, email address, and gender.

Note: While the gender field is required, you can choose to opt out by selecting Prefer not to identify

Member Details

Title	<input type="text"/>
First Name	<input type="text"/> *
Middle Name	<input type="text"/>
Last Name	<input type="text"/> *
Suffix	<input type="text"/>
Email	<input type="text"/>
Gender	<input type="text"/> *

9. Now you will enter the address details for your new member in the fields provided.

Address

Preferred Address Home Work

Address 1:	<input type="text"/> *
Address 2:	<input type="text"/>
City:	<input type="text"/> *
Country:	<input type="text" value="Canada"/> *
Province/Territory:	<input type="text" value="Select Province/Territory"/> *
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, we have the ClubRunner Account details. You will see the members automatically generated login details which can be changed, and you may also choose to send a welcome email to the new member.

ClubRunner Account

Login Name	<input type="text" value="..13684"/> *		
Temporary Password	<input type="text" value="13684"/> *		
Send email notification to this member?	<input checked="" type="checkbox"/>	<input type="text" value="System"/>	<input type="text" value="Welcome New Member"/>

11. Click **Add Member** to save the new member to your Club's Active Members List.

For Rotary Clubs with RI Integration Enabled

When your club has the integration service enabled before the member is added to ClubRunner or Rotary we now check the details of the new member with Rotary. We search the Rotary database on the details provided in the form using their: Rotary ID , Email Address, Name & Location. Any matches will be displayed for you to choose.

Potential Matching Members at Rotary International

Select a Member to Transfer to your Club

i We have searched the RI database for possible matching members. Review the records and select the best match.

Select	Member Details	Club Associations	Matched By
<input type="radio"/>	Add as a new member		
<input type="radio"/>	Name: Zach Smiths Rotary ID: 10058168181 Location: Hartland, AB, Canada	No Clubs	Name and Country
<input type="radio"/>	Name: Zachary Smithsfield Rotary ID: 10068162181	Kitchener-Westmount - Current Member Warning: This member already has an active membership with	Name and Country

Cancel OK

- Review your list of potential matches, if you are able to locate a match at Rotary for your member select the member and click the **OK** button. If you are unable to locate a match, skip to step 3.

Potential Matching Members at Rotary International

Select	Member Details	Club Associations	Matched By
<input type="radio"/>	Add as a new member		
<input type="radio"/>	Name: Zach Smiths Rotary ID: 10058168181 Location: Hartland, AB, Canada	No Clubs	Name and Country
<input type="radio"/>	Name: Zachary Smithsfield Rotary ID: 10068162181 Location: Toronto, ON, Canada	Kitchener-Westmount - Current Member Warning: This member already has an active membership with Kitchener-Westmount	Name and Country
<input type="radio"/>	Name: Zacharias Smith Rotary ID: 10089645212 Location: Ottawa, On, Canada	Oakville-West - Current Member Warning: This member already has an active membership with Oakville-West	Name and Country

Cancel OK

Note: If a member has an active relationship with another club, you will not be able to add them to your membership at Rotary International. You can still add the member in ClubRunner, but the integration will not be successful.

- You will now be prompted to review the updated information. Based on your member selection, we have updated the form to match the members details at Rotary International in order to help ensure a successful integration. Once ready to proceed click **Add Member**.

Member Information
✕

Please confirm the following

Rotary Information and Integration

Sponsor	Gates, William
Rotary Member No.	10058168181
Date Joined Club	Jul 30, 2020

Member Details

First Name	Zach
Last Name	Smiths
Gender	Male

Address

Cancel
Add Member

3. If there are no matches that seem to be related to your member you should choose **Add as a new member**. The member will be added directly to ClubRunner and sent to be processed at Rotary as a brand new Rotarian.

Potential Matching Members at Rotary International
✕

Select	Member Details	Club Associations	Matched By
<input checked="" type="radio"/>	Add as a new member		
<input type="radio"/>	Name: Zach Smiths Rotary ID: 10058168181 Location: Hartland, AB, Canada	No Clubs	Name and Country
<input type="radio"/>	Name: Zachary Smithsfield Rotary ID: 10068162181 Location: Toronto, ON, Canada	Kitchener-Westmount - Current Member	Name and Country
		Warning: This member already has an active membership with Kitchener-Westmount	
<input type="radio"/>	Name: Zacharias Smith Rotary ID: 10089645212 Location: Ottawa, On, Canada	Oakville-West - Current Member	Name and Country
		Warning: This member already has an active membership with Oakville-West	

Cancel
OK

Note: If for any reason there are no matches, the system will automatically select this choice on your behalf and directly add the member to both ClubRunner and Rotary without further prompts.

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