ClubRunner

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How do I add a new member on the district's website?

Omar S. - 2021-03-31 - Membership Management

When you recruit a new member, or discover an active member is missing from your database, you can use your ClubRunner District site to add a new member to your **Members List.** This guide covers both our new Add Member form, and our Classic Add member form using the District website.

Add Member

1. To access the **Member List** feature, you must go to your District 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 **For Clubs** tab.

3. Now, click on **Membership 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

Mem	bers	per F	age:	25	~																							
All	А	В	С	D	Е	F	G	Н	Т	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	X	Y	Ζ		
																				Trar	nsfer	New	Men	nber	Ad	d Nev	v Mer	nber
																												•
Ema	il		By Fir	st Na	me	Nan	ne 🔺										Туре			Acce	SS	Act	tion					
٨		Aaro	nson	, Aaro	on												Activ	e		30		Cha	ange	Statu	s F	Reset	Pass	word
~			_																					_			_	

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

lembe	ers	per F	^o age:	25	~																								
All	А	В	С	D	Е	F	G	Н	1	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	۷	V	Х	Y	Ζ		
																				Tra	nsfer	New	v M	embe	er	Ad	d Nev	w Men	nber
Email	il		By Fir	st Na	ame	Nar	ne 🔺										Туре			Acce	ess	Ac	tior	ı					
		Aaro	nsor	, Aar	on												Activ	'e		30		Ch	ang	je Sta	atus	R	eset	Passw	vord
		Adar	ms, S	arah													Hone	orary		40		Ch	ang	je Sta	atus	R	eset	Passw	vord
		Barn	ies, S	teve													Hone	orary		60		Ch	ang	je Sta	atus	R	eset	Passw	vord
		Benr	nett, s	Shaw	n												Activ	'e		70		Ch	ang	je Sta	atus	R	eset	Passw	vord
		Boyo	d, Par	n													Activ	'e		70		Ch	ang	je Sta	atus	R	eset	Passw	vord
		Burk	e, Ca	rol													Activ	e		70		Ch	ang	je Sta	atus	R	eset	Passw	vord
		Burk	e, Ma	artin													Hone	orary		70		Ch	ang	je Sta	atus	R	eset	Passw	vord
		Carp	ente	r, Phy	rllis												Activ	e		70		Ch	ang	je Sta	atus	R	eset	Passw	vord

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	Active V*
Sponsor	N/A ~ 3
Rotary Member No.	
Date Joined Club	Jul 30, 2020
Integration Options	• Report this new member to Rotary International
	O 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		
First Name		*
Middle Name		
Last Name		*
Suffix	~	
Email		
Gender	*	

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

Address	
Preferred Address	• Home Vork
Address 1:	*
Address 2:	
City:	*
Country:	Canada 🗸
Province/Territory:	Select Province/Territory V
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, 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.

	-
13684	*
13684	*
System 🗸 Welcome New M	1ember 🗸
	13684 13684 ✔ System ✔ Welcome New N

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														
We h	a Member to Tran	for possible matching members.												
Select	Member Details 🚽 Add as a new member	Club Associations 🗸	Matched By 🗸											
0	Name: Zach Smiths Rotary ID:10058168181 Location: Hartland, AB, Canada	No Clubs	Name and Country											
0	Name: Zachary Smithsfield Rotarv ID: 10068162181	Kitchener-Westmount - Current Member Warning: This member already has an active membership with	Name and Country	•										
			Cancel	ОК										

1. 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.

Potentia	l Matching Members at I	Rotary International		×
Select	Member Details 🚽 Add as a new member	Club Associations 🗸	Matched By 🗸	^
0	Name: Zach Smiths Rotary ID:10058168181 Location: Hartland, AB, Canada	No Clubs	Name and Country	
0	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	
0	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	DK

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.

2. 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**.

Please confirm the following

Sponsor	Gates, William	
Rotary Member No.	10058168181	
Date Joined Club	Jul 30, 2020	
Member Details		
First Name	Zach	
Last Name	Smiths	
Gender	Male	
Address		

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.

Potentia	I Matching Members at I	Rotary International		×
Select	Member Details 🚽	Club Associations 🗸	Matched By 🗸	*
0	Name: Zach Smiths Rotary ID:10058168181 Location: Hartland, AB, Canada	No Clubs	Name and Country	ł
0	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	
0	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	ОК

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.

×

Add New Member (Classic)

1. To add a member through the District site, go to your District webpage and click on the **Login** link at the top right of the page. Then, enter your login details on the page that appears.

2. You are now logged in. To access the District Administration page, click on **Member Area** on the top right.

3. You are now on the **District Administration** page. Click the **For Clubs** tab just under the header.

4. Next, click on Membership Lists.

Active Members List

5. You are now presented with an **Active Members List** for your own club. You can view and edit member details as on your own club webpage.

Select Clu	ıb: G	reen	Towr	ı				٠																				
Members	per P	age:	25	•																								
All A	В	С	D	E	F	G	Н	$ 1\rangle$	J	К	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	Х	Y	Ζ			
																										Ad	d New	Membe
Email	B	y Firs	t Nar	me	Nan	ne 🔺								Ту	pe		Ac	ces	S	Acti	on							
٨	Apple	egate,	Joh	n										Ac	ctive		70)		Desi	ignat	ion	Char	nge S	tatus	s R	eset Pa	assword
	Baker	, Sue												Ac	ctive		70)		Desi	ignat	ion	Char	nge S	tatus	s R	eset Pa	assword
	Brack	ett, L	eigh											Ac	ctive		40)		Desi	ignat	ion	Char	nge S	tatus	s R	eset Pa	assword
	Chu, I	Edwa	rd											Ac	ctive		30)		Desi	ignat	ion	Char	nge S	tatus	s R	eset Pa	assword
	Davis	, Clar	e											Н	onora	ry	70)		Desi	ignat	ion	Char	nge S	tatus	s R	eset Pa	assword

6. To add a new member, click the **Add New Member** link at the right side of the screen, just above the list of active members.

Active	Mem	bers	List	

Select Cl	lub:	Gree	n Tov	vn				•																				
Members	s per	Page	: 25	5 •																								
All A	B	С	D	Ε	F	G	Н	I.	J	K	L	М	Ν	0	Ρ	Q	R	S	Т	U	۷	W	X	Y	Ζ			
																										Add N	ew Mer	nber
Email		By Fi	rst Na	ame	Nan	ne 🔺								Ту	ре		Ac	cess	6	Acti	on							
٨	Ap	plega	te, Jol	hn										Ac	tive		70)		Desi	ignat	ion	Char	ige S	tatu	s Rese	t Passv	vord
	Ba	ker, Su	le											Ac	tive		70)		Desi	ignat	ion	Char	ige S	tatu	s Rese	t Passv	vord

7. You are now on the **New Member** page. Fill in the contact details for your new member in the fields provided.

Note: For Rotary Clubs, Rotary International requires that the Date Joined Club must be today's date, or 30 days into the past. You cannot input a date in the future.

Note: For Rotary Clubs, The Date Joined Rotary and Date Joined Club field will be different

if your new member has transferred from another Club, or is a former Rotarian.

New Member

	Rotary Club of	Green Town Dakville, ON, Canada	
	Title	Mr.	
	First Name	Dexter	
	Middle Name	Chester	
	Last Name	Ward	
	Suffix	T	
	Gender	Male	ale
Ν	Nembership Type	Active •	•
	Sponsor		
Da	ate Joined Rotary	May 01 2020	
	Date Joined Club	May 01 2020	
		RI requires that Date Jo	Joined Club must be within the past 30 days.

8. In the fields under the heading **Transferring Member?** you can indicate whether or not your new member is transferring from another club and, if so, their club and district of origin.

Transferring Member?

	◎ No ④ Yes
Rotary Member No.	5555
Former Rotary Club	Providence, RI
District	1234

9. Enter the new member's **Email** and define their user name and password in the fields provided. A **Login Name** and **Temporary Password** are automatically generated for you, but you may change this later as you wish.

You may also choose **Send Email notification** to send the member a welcome email, either using an existing template or one you compose yourself. Then, use the check box to set whether or not you wish to inform Rotary International of this new member enrollment.

lubRunner Account			
Email	cdexter@example.com		
Login Name	Dexter.Ward.123		
Temporary Password	123		
Send email notification to this member?	Custom • New to Rotary	y - Template 🔹	
Report this new member to Rotary International			

Do NOT report this new member to Rotary International

Please note that member additions are performed manually by RI Data Services, and could take up to 5 business days to be processed.

Note: If you are a Rotary Club, make sure Report this new member to Rotary International is selected, otherwise RI will not be aware of this new member addition at the Club.

10. Finally, click **Add Member** to save your details.

Email	cdexter@	exam	ple.com	
Login Name	Dexter.W	ard.12	3	
Temporary Password	123			
Send email notification to this member?	Custo	m •	New to Rota	ry - Template

Please note that member additions are performed manually by RI Data Services, and could take up to 5 business days to be processed.

Add Member

This will add the Member to the Club's Member List.

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- How do I view and edit my club's membership on the district's website?
- How do I terminate a member on the district's website?