

ClubRunner

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

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

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	Active ▼ *
Sponsor	N/A ▼ ?
Rotary Member No.	<input type="text"/>
Date Joined Club	Jul 30, 2020  *
Integration Options	<input checked="" type="radio"/> Report this new member to Rotary International <input type="radio"/> 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" value="v"/>
Email	<input type="text"/>
Gender	<input type="text" value="v"/> *

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

Address

Preferred Address	<input checked="" type="radio"/> Home	<input type="radio"/> 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

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 <div>Warning: This member already has an active membership with</div>	Name and Country

Cancel

OK

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.

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 <div>Warning: This member already has an active membership with Kitchener-Westmount</div>	Name and Country
<input type="radio"/>	Name: Zacharias Smith Rotary ID: 10089645212 Location: Ottawa, On, Canada	Oakville-West - Current Member <div>Warning: This member already has an active membership with Oakville-West</div>	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.

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**.

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

☐ Add as a new member

☐

Name: Zach Smiths

Rotary ID:10058168181

Location: Hartland, AB, Canada

No Clubs

Name and Country

☐

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

☐

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 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**.
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.






Active Members List

Select Club: Green Town ▼

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](#)

[Add New Member](#)

Email	<input type="checkbox"/> By First Name	Name ▲	Type	Access	Action
		Applegate, John	Active	70	Designation Change Status Reset Password
		Baker, Sue	Active	70	Designation Change Status Reset Password
		Brackett, Leigh	Active	40	Designation Change Status Reset Password
		Chu, Edward	Active	30	Designation Change Status Reset Password
		Davis, Clare	Honorary	70	Designation Change Status Reset Password

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 Members List

Select Club: Green Town ▼

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](#)

[Add New Member](#)

Email	<input type="checkbox"/> By First Name	Name ▲	Type	Access	Action
		Applegate, John	Active	70	Designation Change Status Reset Password
		Baker, Sue	Active	70	Designation Change Status Reset Password

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
Oakville, ON, Canada

Title	<input type="text" value="Mr."/>
First Name	<input type="text" value="Dexter"/>
Middle Name	<input type="text" value="Chester"/>
Last Name	<input type="text" value="Ward"/>
Suffix	<input type="text" value=""/>
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female

Membership Type	<input type="text" value="Active"/>
Sponsor	<input type="text" value=""/>
Date Joined Rotary	<input type="text" value="May 01 2020"/>
Date Joined Club	<input type="text" value="May 01 2020"/>

RI requires that Date 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?

	<input type="radio"/> No <input checked="" type="radio"/> Yes
Rotary Member No.	<input type="text" value="5555"/>
Former Rotary Club	<input type="text" value="Providence, RI"/>
District	<input type="text" value="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.

ClubRunner Account

Email	cdexter@example.com
Login Name	Dexter.Ward.123
Temporary Password	123
Send email notification to this member?	<input checked="" type="checkbox"/> Custom New to Rotary - 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.

Add Member

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.

ClubRunner Account

Email	cdexter@example.com
Login Name	Dexter.Ward.123
Temporary Password	123
Send email notification to this member?	<input checked="" type="checkbox"/> Custom New to Rotary - 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.

Add Member

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

Related Content

- [How do I add or delete a club on the district?](#)
- [How do I find club & membership information?](#)
- [How do I find and transfer new members? \(District Club Exec.\)](#)
- [How do I upload member profile photos on the district's website?](#)
- [How do I reactivate an inactive member on the district's website?](#)
- [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?](#)