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.

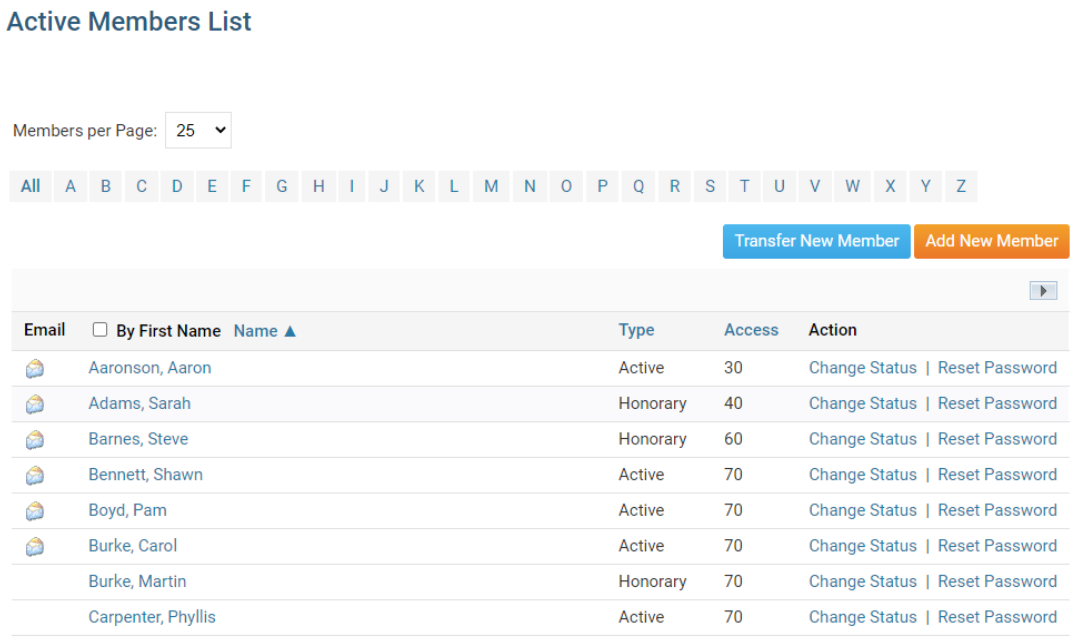
Add Member

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.

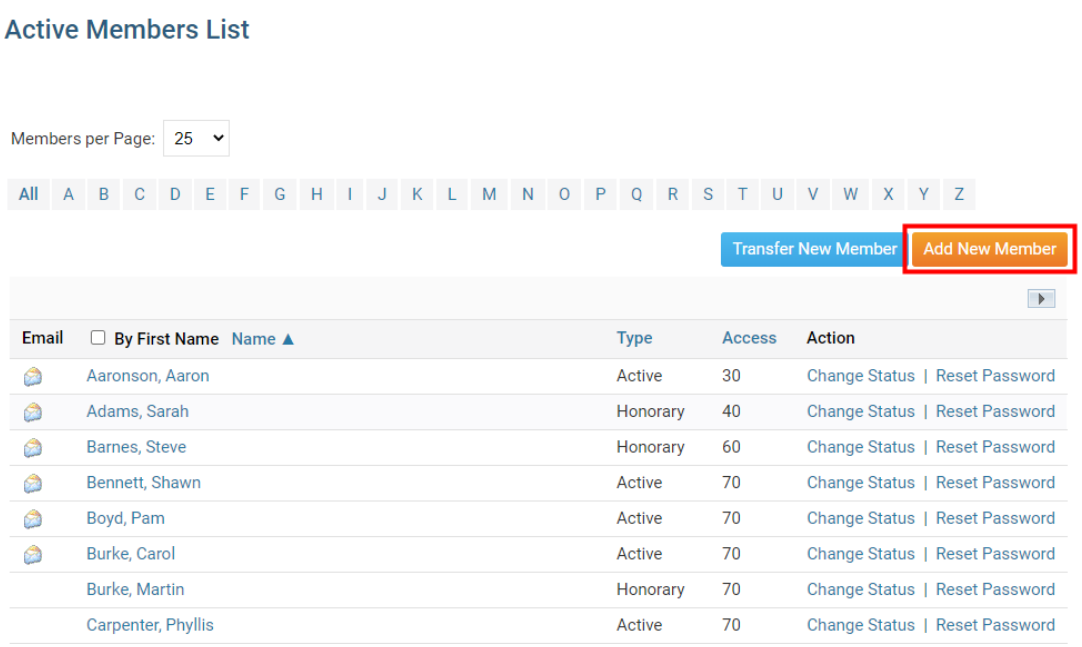
2. Along the top of the screen you will see several tabs. Click on the **For Clubs** tab.

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.

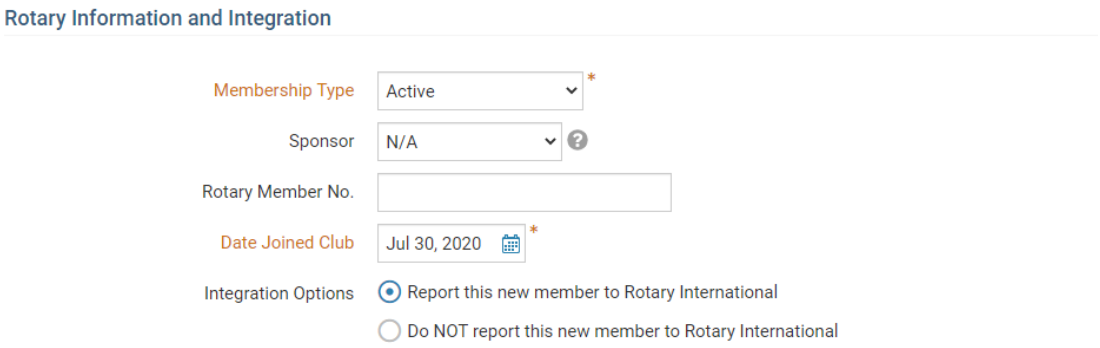


5. To add a new member, simply click the **Add New Member** link at the top right side of your active member list.



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.

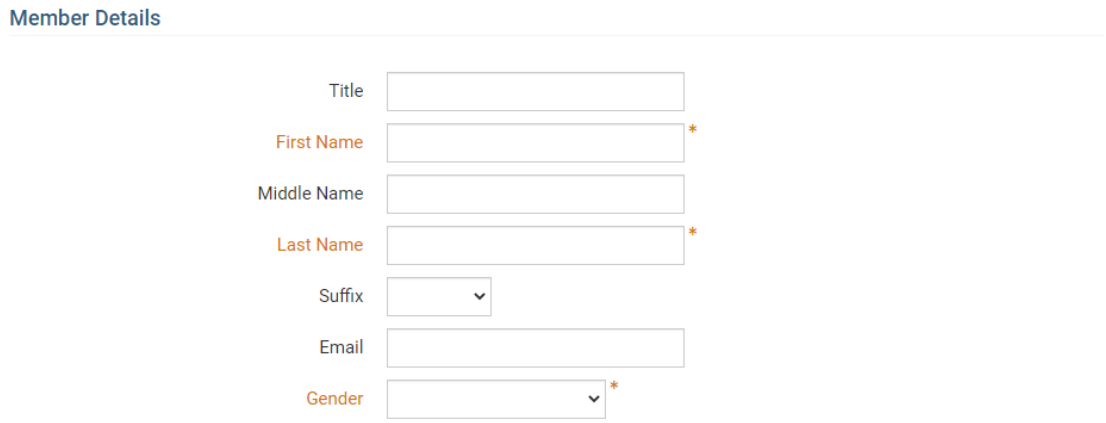


Notes for Rotary Clubs:

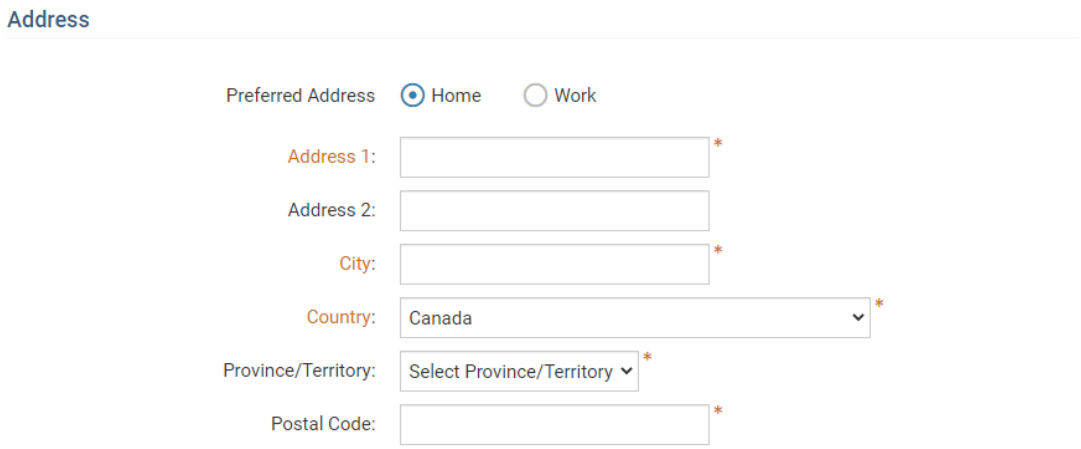
- Rotary International requires that the **Date Joined Club** must be within the last 30 days. *Note that this date cannot be in the future, only the current date or earlier.*
- When choosing not to integrate the new member, we will also not search for matching members at Rotary International.

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

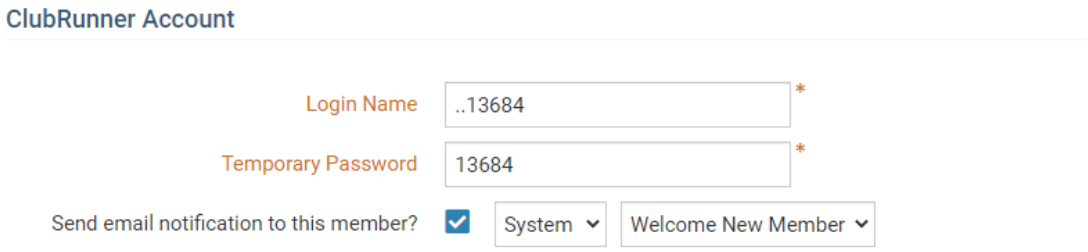


9. Now you will enter the address details for your new member in the fields provided.



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

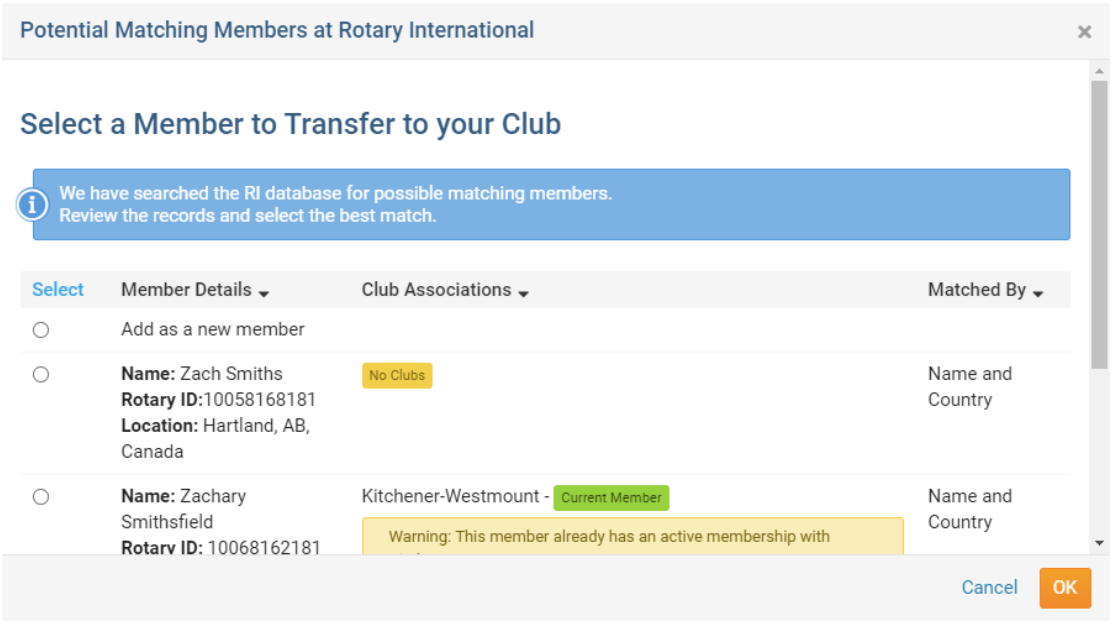
10. Next, we have the ClubRunner Account details. You will see the members automatically generated login details which can be changed, and you may also choose to send a welcome email to the new member.



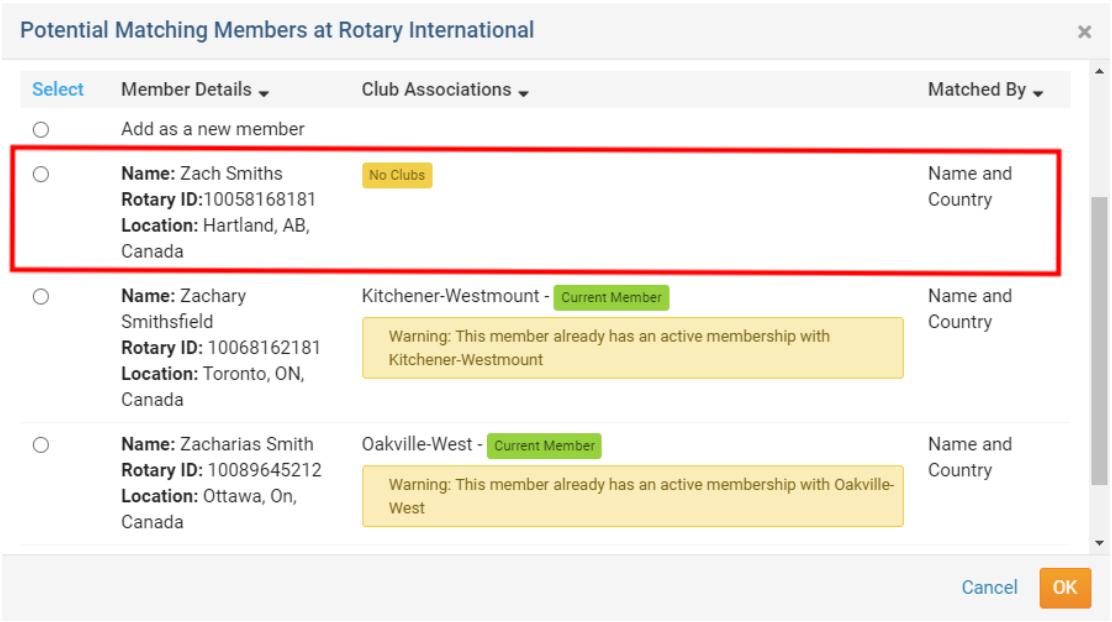
11. Click **Add Member** to save the new member to your Club's Active Members List.

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.

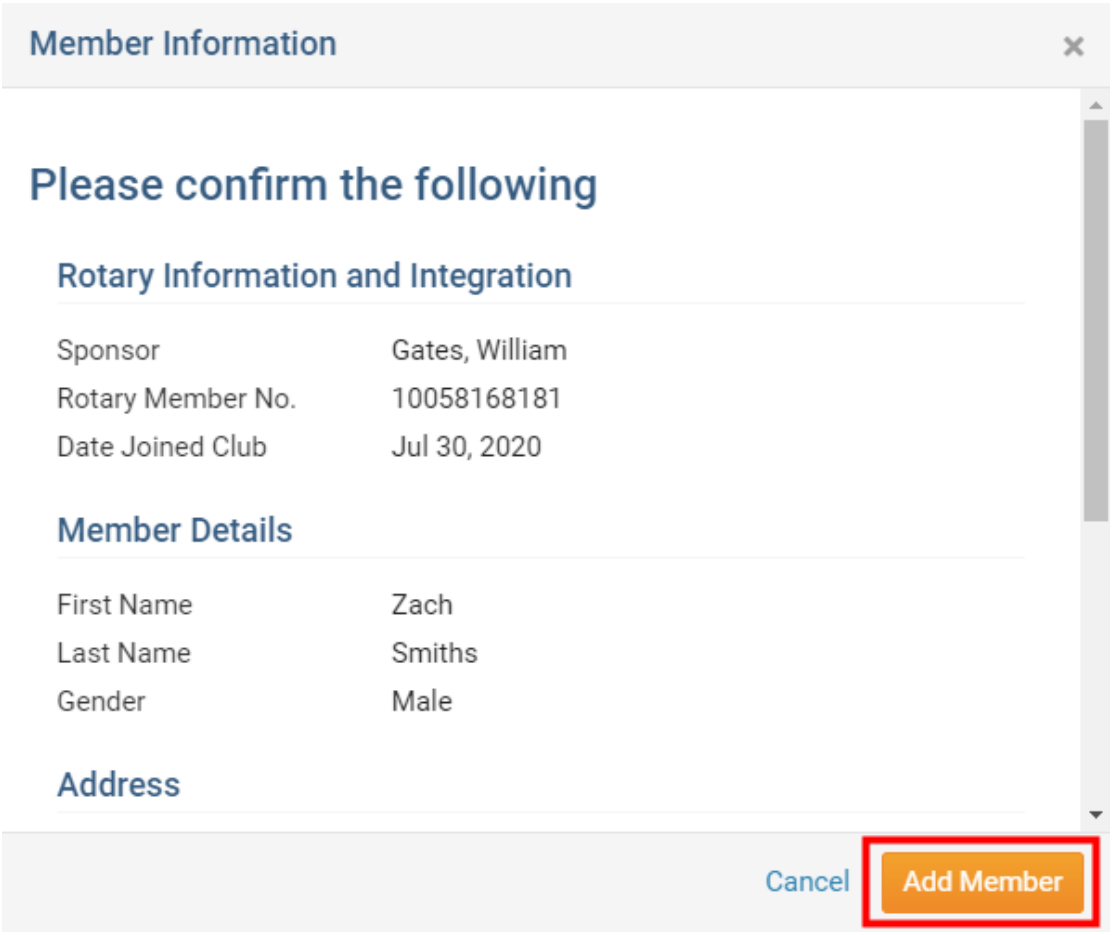


1. Review your list of potential matches, if you are able to locate a match at Rotary for your member select the member and click the **OK** button. If you are unable to locate a match, skip to step 3.

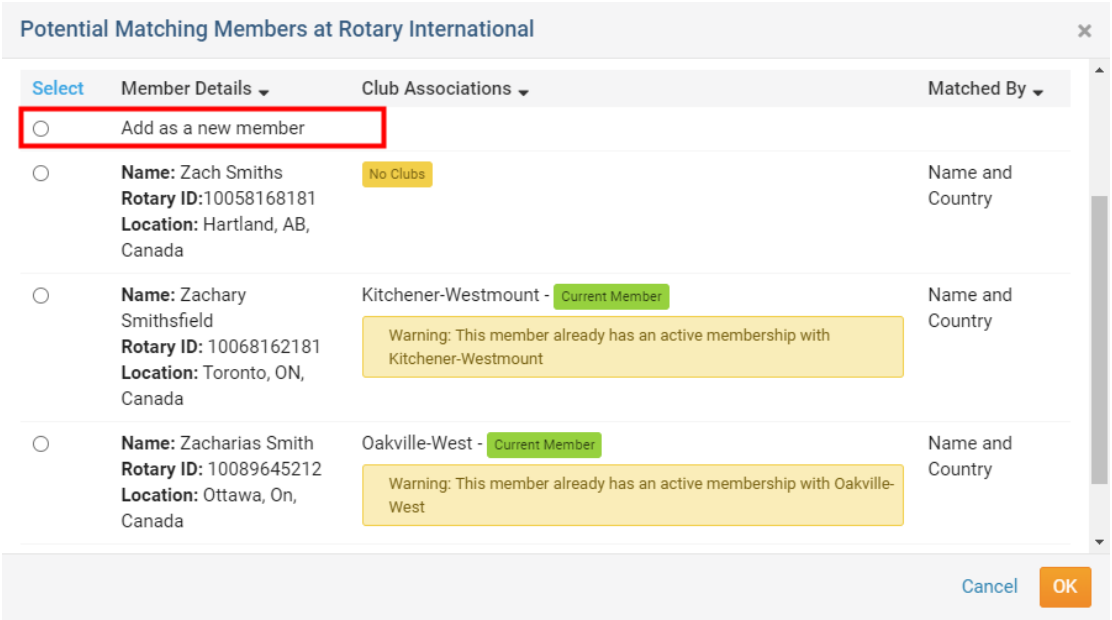


Note: If a member has an active relationship with another club, you will not be able to add them to your membership at Rotary International. You can still add the member in ClubRunner, but the integration will not be successful.

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**.



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.



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

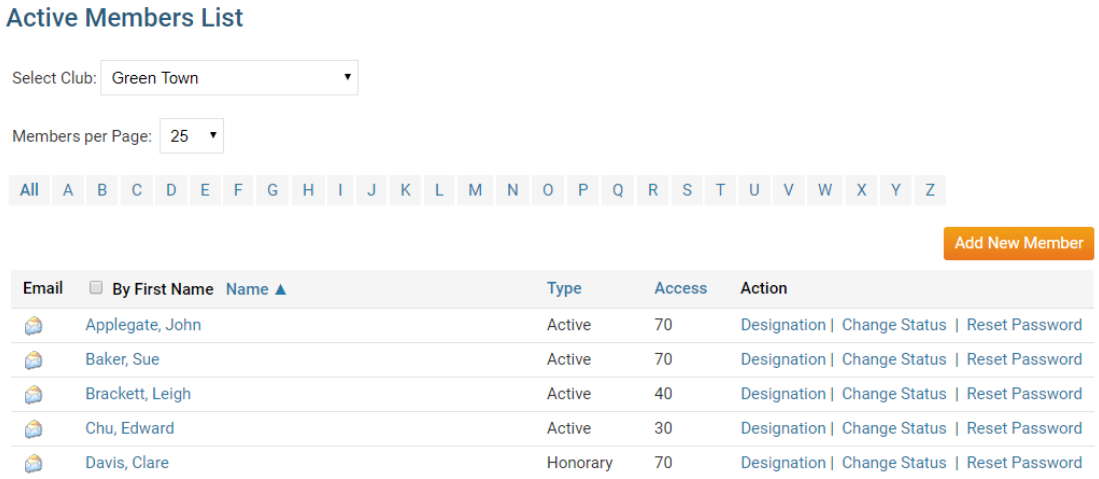
right of the page. Then, enter your login details on the page that appears.

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

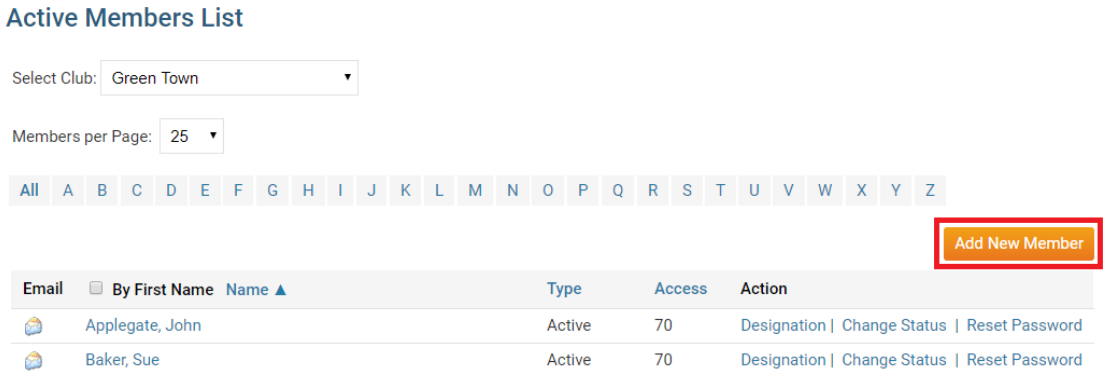
3. You are now on the **District Administration** page. Click the **For Clubs** tab just under the header.

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.



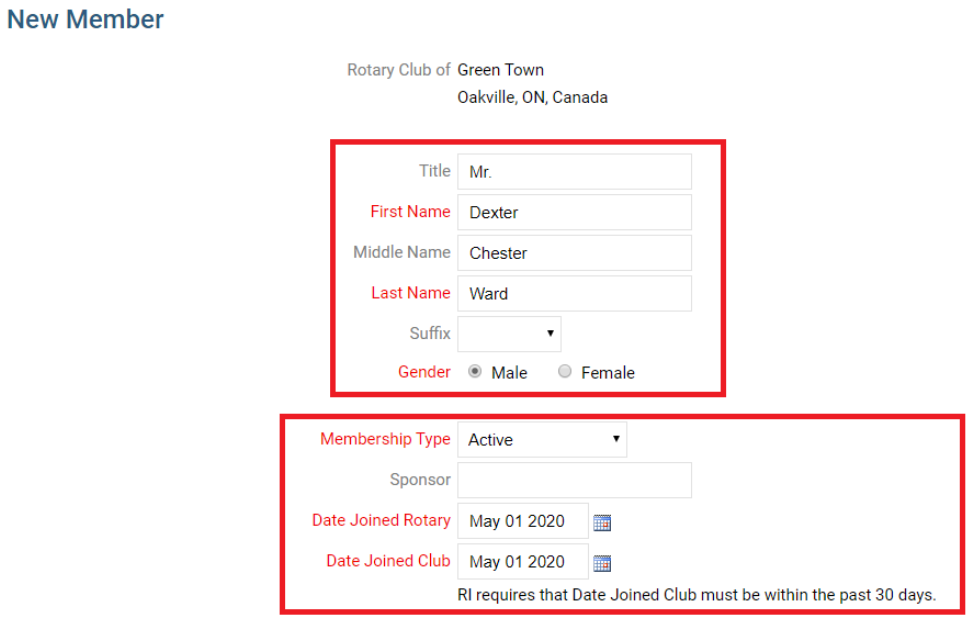
6. To add a new member, click the **Add New Member** link at the right side of the screen, just above the list of active members.



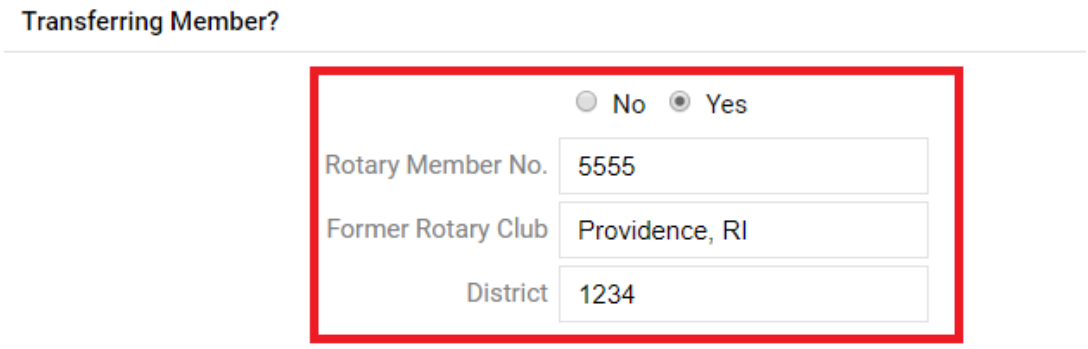
7. You are now on the **New Member** page. Fill in the contact details for your new member in the fields provided.

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.

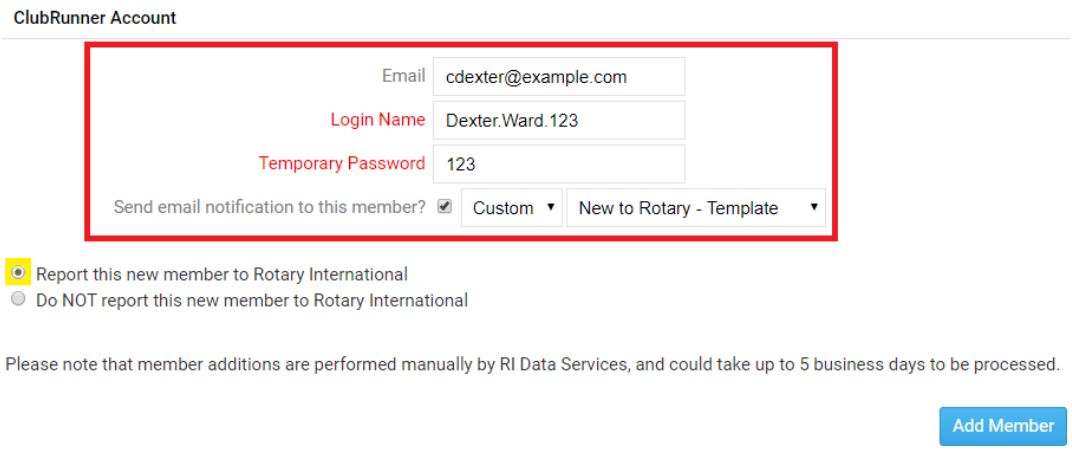


8. In the fields under the heading **Transferring Member?** you can indicate whether or not your new member is transferring from another club and, if so, their club and district of origin.



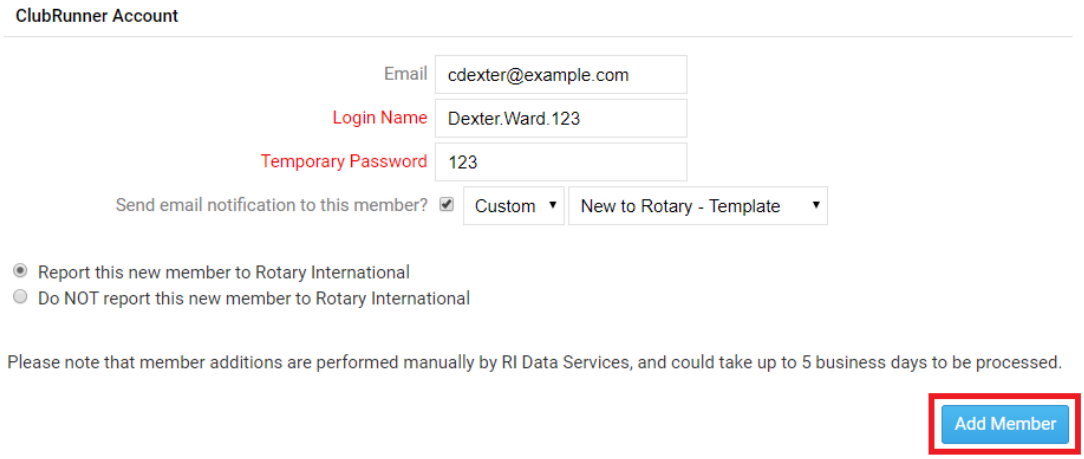
9. Enter the new member's **Email** and define their user name and password in the fields provided. A **Login Name** and **Temporary Password** are automatically generated for you, but you may change this later as you wish.

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.



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.



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?