ClubRunner

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How do I download member data?

Michael C. - 2021-02-25 - Reports

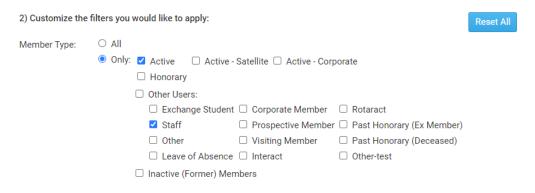
With ClubRunner, you have the ability to generate a document containing membership data. You can generate this spreadsheet according to the fields and filters you define, and save those parameters for the future.

- To download member data, you must go to your club homepage and log in. Then, click on **Member Area** on the top right of the page.
- 2. Along the top of the member area you will see several tabs. Click on the **Membership** or **Reports** tab.
- 3. Then, click on **Download Member Data** in the tabs just below.
- You are now on the **Download Member Data page.** Here, you can choose from a large number of variables to download. Click on the information fields you wish to extract in the download.

Download Member Data

1) Select the fields you would like to extract: Select All | Unselect All Membership Type Preferred Address2 Home Phone Business Zip Code Date Joined Club ✓ Preferred City
 ✓ Home Fax
 ✓ Business Country Years of Service (Rotary) ✓ First Name
 ✓ Preferred State
 ✓ Pager
 ✓ Date of Birth
 ✓ Years of Servi
 ✓ Middle Name
 ✓ Preferred Zip Code
 ✓ Cell
 ✓ Spouse/Partner First Name
 ✓ Personal URL Years of Service (Club) Ø Address Line 1
 Ø Business Fax
 Ø Spouse/Partner Nick Name
 Ø Reason For Termination ✓ Nickname ✓ Address Line 2
✓ Company Name
✓ Spouse/Partner Date of Birth ✓ Date Created Last Modified On Access Level ☑ Zip/Postal Code ☑ Business Address1 ☑ Membership Last Login ✓ Alternate Email
 ✓ Country
 ✓ Business Address2
 ✓ Office
 ✓ Preferred Address
 ✓ Preferred Phone Type
 ✓ Business City
 ✓ Sponsor Privacy Options Badge No. ☑ Preferred Address1 ☑ Preferred Phone ■ Business State
■ Date Joined Rotary

5. Now, select the filters you would like to apply. In the example below, you have selected to only download information about active members and staff user types. You may also filter according significant dates for the membership, such as the date they joined your club, or the last time they updated their profile information.



6. You have the option to save the parameters of the search for use in the future. If you choose to do this, enter a name for the search in the field provided.

3) Click on the Generate button to extract your data in CSV format (compatible with most spreadsheet software):

Save this search for future use? Ono

Pes: Only Active Members and Staff

Generate

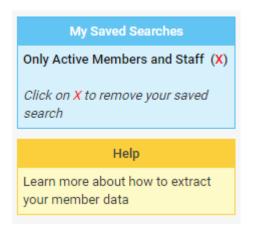
7. When you have finished, click **Generate** to create a CSV format file with the data you have requested. This format is compatible with most spreadsheet software.

| 3) Click on the Generate button to a Save this search for future use? | • | data in CSV format (compatible with most spreadsheet software): |
|-----------------------------------------------------------------------|---|-----------------------------------------------------------------|
| | | Only Active Members and Staff |
| | | Generate |

8. The page will then refresh. Scroll down to the bottom of the page and click the **Download** button beside generate to download the file.

| 3) Click on the Generate button to e Save this search for future use? | • | data in CSV format (compatible with most spreadsheet software): |
|--------------------------------------------------------------------------|--------------|-----------------------------------------------------------------|
| | | Only Active Members and Staff |
| Data expo | orted succes | sfully. Click on Download Download Generate |

9. If you have saved the search, you will find it is available in the top-left of the Download Member Data page. Click the name given in Step 6 for the search, to apply the filter settings. You can also remove saved searches by clicking the X icon, to the right of the search.



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