# ClubRunner

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# How do I view and edit a member's profile? (District)

Michael C. - 2021-07-26 - Membership Management

This article will help you view the members of the Club and their members' profile. Every ClubRunner user has a **Member Profile.** The Member Profile contains all of the information about the member. It contains the member's name, address, Rotary Member Number, and more. If you want to view or edit a member's profile, this article will help.

- 1. To start, go to your the District's homepage. Click on **Member Login** near the top right. Enter your login information to login. Once done, click **Login** and it will take you back to the home page. Then click on **Member Area** near the top right.
- 2. Click on Membership on the grey menu bar.
- 3. Click on Clubs & Membership on the blue menu bar.
- 4. Find the Club you would like to see the member/members in and click on the **Members** link.



Clubs & Membership

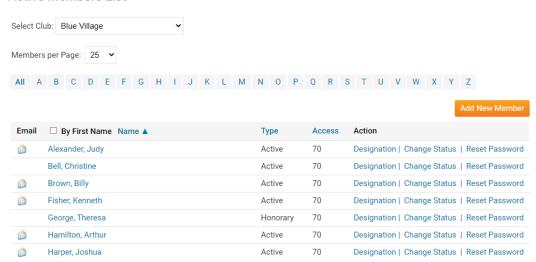
5. This will take you to the **Active Member List**. On the left hand side, you will find links for the **Active Member List**, **Other User List** or **Inactive Members List**. In the middle of the screen, look for the member that you want to view or edit their member profile. Above the member list You could click on a letter to filter the members by last name or click **All** to clear the filter. Once you find the member, click on their name. You can also do other things from this page.

- Add New Member: Lets you add a new member into the Club.
- Change Status: This lets you change the status of a member. The member could

change to active, type of active, honorary or get terminated if the member left the club.

 Reset Password: This lets members with access level 50 to 30 reset the member's password for ClubRunner.

#### **Active Members List**



6. Once you click on the name of the member, it will take you into their **Member Profile**. As you see, at the very bottom of the screen, it will display the date and who was the last person to update the member's profile.

#### **Personal Tab**

On this page it displays personal information about the member. This is useful to see if the profile is up to date. If you want to edit any of this information click on the **Edit** button and once done click **Save**.

- Member Details: This area displays the member's Title (Eg. Mr, Mrs, Dr, Rev), First Name, Middle Name, Last Name, Nickname (Eg. Dave, Mike, Bill), Suffix (Eg, Jr, Sr), Preferred Address, Preferred Phone, Preferred Billing E-mail, E-mail, Alternate E-mail, Gender, Date of Birth, Anniversary, Spouse/Partner First Name, Last Name, Nick Name, and Date of Birth.
- Home: This area displays the member's home address and phone numbers.
- **Work**: This area displays the member's Work Address, Position/Title, Phone number, Fax, and Website URL.
- **Custom Fields**: This displays the fields that were created by the Club. These fields are used to gather additional information about the member. The data could be a date, flag, or field/text. For more information read the <u>Custom Fields</u> article.

### Member Profile



Kathy Arnold Printable Version

Personal Rotary Biography Commitments Settings Privacy

Edit

#### Member Details

 Title
 Gender
 Female

 First Name
 Kathy
 Date of Birth
 Aug 11 1981

 Middle Name
 Anniversary
 Feb 05 2009

 Last Name
 Arnold
 Spouse/Partner First Name
 James

Nickname Spouse/Partner Last Name
Suffix Spouse/Partner Nick Name

Preferred Address Home Spouse/Partner Date of Birth Jan 11 1982

Preferred Phone Home Dues & Billing Preferred Email Primary Email

Email karnold@example.com Alternate Email

#### Home

Address Line 1 123 LaPlace Road Home Phone 1 212-555-1234

Address Line 2 Cell 1 323-555-1234

City Purple City Home Fax

Country Canada
State/Province ON

H0H 0H0

# Work

Company Name ClubRunner Position/Title Product Specialist

Address Line 1 2060 Winston Park Business Phone 1 877-469-2582 2

Address Line 2 Business Fax

City Oakville Website URL https://site.clubrunner.ca

State/Province ON

Zip/Postal Code L6H 5R7

Country Canada

Zip/Postal Code

#### **Custom Fields**

Edit

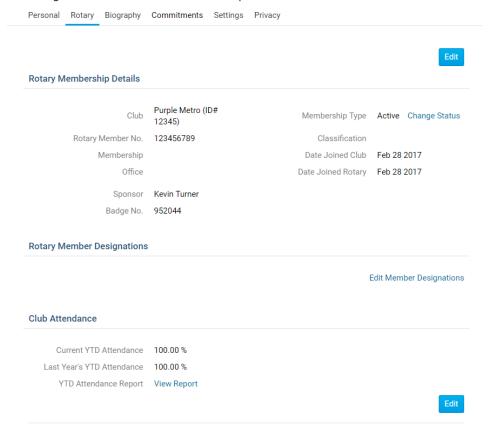
## **Rotary Tab**

On this page it displays information about the Rotary and attendance. If you want to edit any of this information click on the **Edit** button and once done click **Save**.

- Rotary Membership Details: this area shows the Club name, Rotary Member
  Number, Membership, Office, Sponsor, Badge Number, Membership Type,
  Classification, Date Joined Club, and Date Joined Rotary. If you click Change Status it
  lets you change the status of the member. You could terminate the member or
  change the type of membership.
- **Rotary Member Designations**: this displays the member's designations. For more information read the <u>Member Designations</u> article.
- **Club Attendance**: shows their current year to date attendance percentage, last year's year to date attendance percentage, and year to date attendance report.

**Note:** The Badge Number field is used with the <u>Attendance Barcode Scanner module</u>. Updating this number will cause any barcode attendance data that has not yet been imported to become invalid.

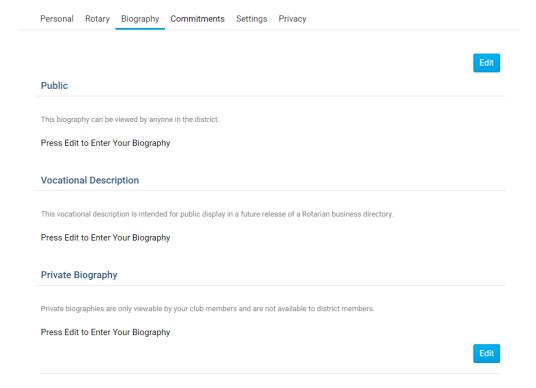
Ensure that there all barcode attendance information has been uploaded before updated the Badge Number field in a member's profile.



#### **Biography Tab**

This page displays the biography of the member. If you want to edit any of this information click on the **Edit** button and once done click **Save**.

- Public: this area can be view by anyone in the District.
- **Vocational Description**: this is for anyone to see in the future release of a Rotarian business directory.
- **Private Biography**: this can only be viewed by your Club members, it cannot be view by the District or the public.



## **Commitments Tab**

This page displays the Club Events, Volunteer Tasks, Meeting Responsibilities, New Member Program, and Current Committees the member is in.

- **Club Events**: This displays the events the member registered for. For more information read the <u>EventPlanner</u> and <u>MyEventRunner</u> articles.
- **District Events**: This displays the events the member registered for in the District.
- **Volunteer Tasks**: This displays the volunteer list the member signed up for. For more information read the <u>Volunteer</u> article.

**Note**: This will display "Loading Volunteer Data..." for a few seconds as it loads.

- Meeting Responsibilities: This displays the meeting responsibilities the member has. For more information read the <u>Meeting Responsibilities</u> article.
- **New Member Program**: This displays the activity the member has in the New Member Program. For more information read the <u>New Member Program</u> article.
- **Current Committees**: This displays the committees the member is in. For more information read the <u>Committees</u> article.

Personal	Rotary	Biography	Commitments	Settings	Privacy

#### **Club Events**

Date	Event Name	Location	Member/Friend
Jul 25 2019	Summer BBQ 2019		Kathy Arnold
Dec 17 2019	Christmas Party 2016		Kathy Arnold

#### Volunteer Tasks

Date	Schedule	Name	Task
Apr 13, 2019	8:30 AM - 11:30 PM	Kathy Arnold	Spring Park Cleanup - Cleanup 1
Dec 05, 2018	2:00 PM - 10:00 PM	Kathy Arnold	Bell Ringing 2018 - Shift 5

#### Meeting Responsibilities

Group	Position
No meeting responsibilities assigned.	

#### **New Member Program**

New Member	Action	Date Completed
Adam Mitchell	Download & Login to the ClubRunner App	Open
Timothy Parker	Download & Login to the ClubRunner App	Open

#### **Current Committees**

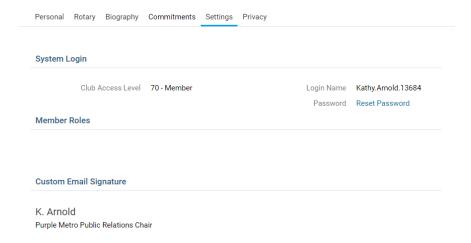
Committee	Role	Action	
Club			
Website Committee	Secretary		View Committee
Communications	Chair		View Committee
Social Committee	Member		View Committee

# **Settings Tab**

On this page it displays the **Access Level**, and **Login Information**, **Member Roles** and **Custom Email Signature**. If you want to edit any of this information click on the **Edit** button and once done click **Save**.

- Club Access Level: This is the level of access the member has to the <u>Club</u>. For more information read the <u>Access Levels</u> article. Access rights on the District are given by a different way. To learn about this, please read the article called <u>Change a member's District Access Level</u>.
- **Login Name**: This is the members login name. You could change the login name, to make the login process easier for the member.
- Password: This lets you reset the member's password.
- **Member Roles**: This displays if the member has read only access to MyEventRunner. To give the member read only access click the **Edit** button, then click the checkbox, and then click **Save**.

• **Custom Email Signature**: This displays the member's email signature.



#### **Privacy Tab**

This page shows the member's **Communication Preferences** and Club's **RI Integration Privacy**. If you want to edit any of this information click on the **Edit** button and once done click **Save**.

- **Communication Preferences**: The member can choose not to receive certain emails. For more information read the **Email Privacy** article.
- **Search Privacy**: These options allow you to control what information is available to members who are not in your club when they use features such as the District's Member Search and view your Club in the ClubRunner Mobile app.

**Note**: The ClubRunner mobile app stores cached data for offline use and when internet connectivity is limited. This means that changes made to your privacy settings may take time to update and display in the mobile app. The mobile application caches member data for 14 days.

**Note:** Any individuals who are listed in their Club's Executives & Directors list will have their Name and Position listed in the Mobile app. All other privacy options will be respected.

• **RI Integration Privacy**: This displays the Rotary International Integrations settings for the members. For more information read the <u>RI Integration Guide</u>.

Allow Business Phone (Club Opted Out)

Allow Home Fax (Club Opted Out)
Allow Business Fax (Club Opted Out)
Allow Primary Email (Club Opted Out)

# **Related Content**

• How do I search for a member?

Allow Business Address (Club Opted Out)

Allow Birthday (Club Opted Out)

- How do I request member updates? (District)
- How do I add a member designation?
- How do I look up member data changes?