ClubRunner

Step 1: Setting up your member data

Omar S. - 2021-06-11 - New Subscribers Guide

Now, you'll find out how to get your membership information uploaded to your new ClubRunner site.

Submit your member data
When you order ClubRunner, you can send us your member data in Excel format, and we will upload this information to your site on your behalf. Email your member data in an Excel file to **memberdata@clubrunner.ca**. Be sure to state your club name in the subject line of the email. You can use the sample Excel template found at **this link**, which will open in a new window. This sample file template was also included with the confirmation email you received when you submitted your ClubRunner order.

Ensure each field is placed in a separate column and that each member record occupies one row only. Please note that if you choose to send in your member information it will replace any member data previously added during the trial period (including any custom fields created) with the exception of information added for the site administrator. ClubRunner requires seven to 10 business days to complete entering your member data. While you are free to use your own Excel file of membership, formatting that file to match our template can expedite the process.

Remember, if your district is already online with ClubRunner, membership details will already be available on your club site, based on the information available to the district. You can choose to keep this member information from the district, or you can replace the list with the information in the Excel file you send us.

Check for duplicates and add your member photos
After you receive confirmation from us that your data is complete, please login to your site to ensure that there are no duplicate records. We will also generate your member login names and passwords with a preset formula, which will be specified in the confirmation email. Your members can then edit these preset values according to their own preference. At this point, you can now add your member photos by clicking on their names within the "Active Member List," then clicking on "Update" under each photo.

Create any Custom Fields or Member Designations
After the upload is complete, you can add additional fields to the member profiles. This function allows clubs to track member details in addition to the information covered by the basic profile. Note that there are multiple tabs on the profile, and that Rotary specific information is located under the Rotary tab. For more instructions on adding custom fields, **click here** to open those instructions in a new window.

Member designations are special labels that you can assign to members, along with additional comments. These designations are used to track awards and recognitions, such as Paul Harris Fellowship recipients. Only club executives are able to edit member designations. To create and manage designations, go to the “Member Designation” link in the Admin page. You will also be able to print reports, export data, and filter emails to members according to these designations.

*Go back to the **Welcome Page** or proceed to **Step Two**.*

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