ClubRunner

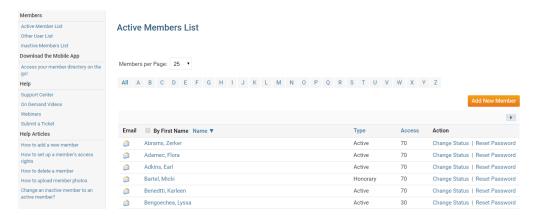
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What is the member profile, and how do I edit it?

Michael C. - 2022-10-21 - Membership Management

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, access level and more. If you want to view or edit a member's profile, this article will help.

- To start, go to your Club'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. Click on **Member Area** near the top right.
- 2. Click on **Membership** tab in the top blue bar.
- 3. Click on the **Member Lists** tab in the grey bar that will appear just below.
- 4. 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. For more information read the New Member article.
 - 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.



5. 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 Jim

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

Work

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

Zip/Postal Code

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

Country Canada
State/Province ON

Custom Fields

Edit

Zip/Postal Code L6H 5R7

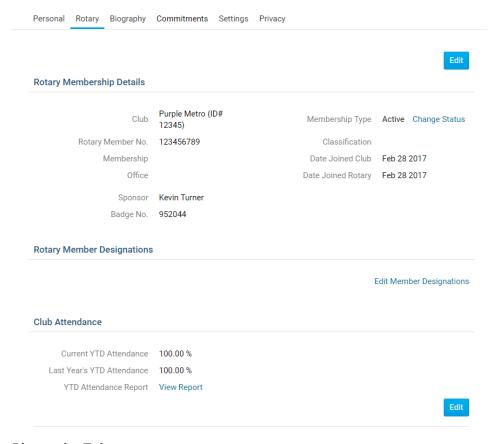
Rotary Tab

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.

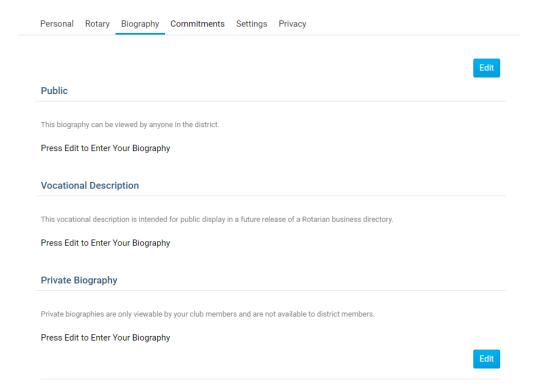


Biography Tab

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.

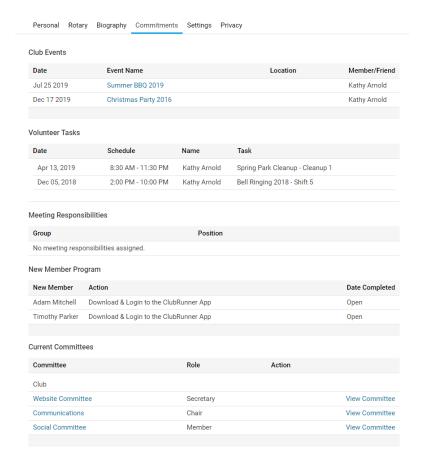


Commitments Tab

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.
- **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.

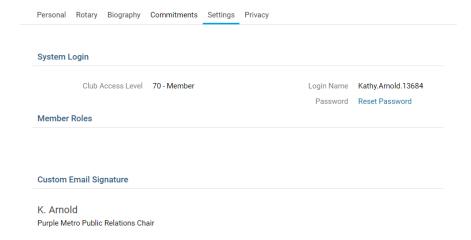
• **Current Committees**: This displays the committees the member is in. For more information read the <u>Committees</u> article.



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 Club. For more information read the <u>Access Levels</u> article.
- **Login Name**: This is the members login name. The member and members with access level 50 to 30 can change the login name, to make the login process easier.
- **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**, **Search Privacy**, 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 <u>Email Privacy</u> 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>.



Related Content

- Reversing a member termination within ClubRunner
- How to fix members missing in ClubRunner and Rotary International in Compare and Synchronize
- How do I download member data?
- How do I upload a profile photo for a member?
- How do I add a new member?
- How do I create custom fields?
- How do I request member profile updates?
- How can I prevent an ex-member from receiving invoices?
- How do I find and transfer new members?
- What access levels are there in ClubRunner?
- How do I change a member's access level?