

i. Introduction

General Overview

The Download Member Data report is designed to be a custom report. Members have the ability to select which fields they would like in the report as well as apply different filters to get specific information that gets exported out to a CSV file.

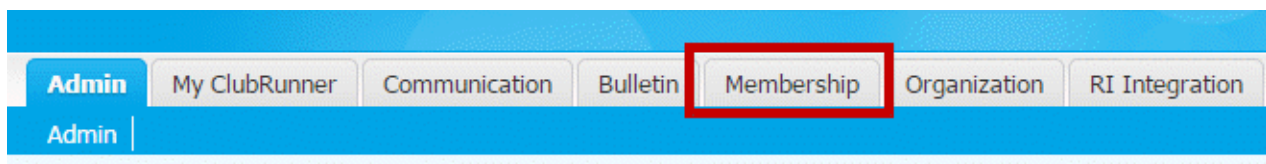
Who can view the Download Member Data?

A member must have minimum access rights of **Club Executive** (level **50**) or better. This will allow you to:

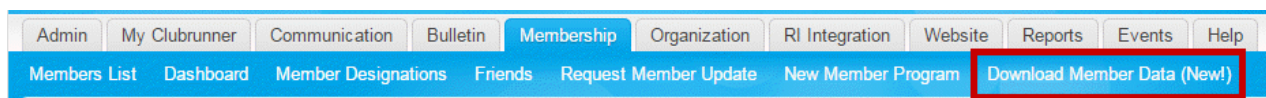
- Customize a member data report (Apply filters, data ranges, etc.)
- Export member data via CSV file

Where can I find this page?

Please login to your Club and go to the **Member Area**. Click **Membership** on the grey menu bar near the top.



Click **Download Member Data** on the blue menu bar.



Download Member Data page

1) Select the fields you would like to extract: [Select All](#) [Unselect All](#)

This section gives the member the ability to select the fields that they would like to see in the report. Click the **Select All** link to select all fields. The **Unselect All** link will deselect all of the checkboxes.

Download Member Data

1) Select the fields you would like to extract: [Select All](#) | [Unselect All](#)

- | | | | | |
|--|--|---|--|---|
| <input checked="" type="checkbox"/> Membership Type | <input checked="" type="checkbox"/> Preferred Address2 | <input checked="" type="checkbox"/> Home Phone | <input checked="" type="checkbox"/> Business Zip Code | <input checked="" type="checkbox"/> Date Joined Club |
| <input checked="" type="checkbox"/> Title | <input checked="" type="checkbox"/> Preferred City | <input checked="" type="checkbox"/> Home Fax | <input checked="" type="checkbox"/> Business Country | <input checked="" type="checkbox"/> Years of Service (Rotary) |
| <input checked="" type="checkbox"/> First Name | <input checked="" type="checkbox"/> Preferred State | <input checked="" type="checkbox"/> Pager | <input checked="" type="checkbox"/> Date of Birth | <input checked="" type="checkbox"/> Years of Service (Club) |
| <input checked="" type="checkbox"/> Middle Name | <input checked="" type="checkbox"/> Preferred Zip Code | <input checked="" type="checkbox"/> Cell | <input checked="" type="checkbox"/> Spouse/Partner First Name | <input checked="" type="checkbox"/> Personal URL |
| <input checked="" type="checkbox"/> Last Name | <input checked="" type="checkbox"/> Preferred Country | <input checked="" type="checkbox"/> Business Phone | <input checked="" type="checkbox"/> Spouse/Partner Last Name | <input checked="" type="checkbox"/> Termination Date |
| <input checked="" type="checkbox"/> Nickname | <input checked="" type="checkbox"/> Address Line 1 | <input checked="" type="checkbox"/> Business Fax | <input checked="" type="checkbox"/> Spouse/Partner Nick Name | <input checked="" type="checkbox"/> Reason For Termination |
| <input checked="" type="checkbox"/> Suffix | <input checked="" type="checkbox"/> Address Line 2 | <input checked="" type="checkbox"/> Company Name | <input checked="" type="checkbox"/> Spouse/Partner Date of Birth | <input checked="" type="checkbox"/> Date Created |
| <input checked="" type="checkbox"/> Gender | <input checked="" type="checkbox"/> City | <input checked="" type="checkbox"/> Position/Title | <input checked="" type="checkbox"/> Anniversary | <input checked="" type="checkbox"/> Last Modified On |
| <input checked="" type="checkbox"/> Club Position | <input checked="" type="checkbox"/> State/Province | <input checked="" type="checkbox"/> Classification | <input checked="" type="checkbox"/> Member No | <input checked="" type="checkbox"/> Access Level |
| <input checked="" type="checkbox"/> Email | <input checked="" type="checkbox"/> Zip/Postal Code | <input checked="" type="checkbox"/> Business Address1 | <input checked="" type="checkbox"/> Membership | <input checked="" type="checkbox"/> Last Login |
| <input checked="" type="checkbox"/> Alternate Email | <input checked="" type="checkbox"/> Country | <input checked="" type="checkbox"/> Business Address2 | <input checked="" type="checkbox"/> Office | <input checked="" type="checkbox"/> Privacy Options |
| <input checked="" type="checkbox"/> Preferred Address | <input checked="" type="checkbox"/> Preferred Phone Type | <input checked="" type="checkbox"/> Business City | <input checked="" type="checkbox"/> Sponsor | <input checked="" type="checkbox"/> Badge No. |
| <input checked="" type="checkbox"/> Preferred Address1 | <input checked="" type="checkbox"/> Preferred Phone | <input checked="" type="checkbox"/> Business State | <input checked="" type="checkbox"/> Date Joined Rotary | |

NOTE: You may see additional checkboxes below "Access Level". These are the Club's **custom fields**.

2) Customize the filters you would like to apply:

This section gives the member the ability to select certain member types, date ranges, and/or club positions.

Member Type: Filters members based on their membership type.

Member Type: All

Only: Active Honorary

Other Users:

<input checked="" type="checkbox"/> Exchange Student	<input type="checkbox"/> Leave of Absence	<input type="checkbox"/> Visiting Member
<input checked="" type="checkbox"/> Staff	<input type="checkbox"/> Corporate Member	<input type="checkbox"/> Interact
<input checked="" type="checkbox"/> Other	<input type="checkbox"/> Prospective Member	<input type="checkbox"/> Rotaract

Inactive (Former) Members

If the **Inactive (Former) Members** checkbox is selected then the **Termination Reason** options will appear:

Inactive (Former) Members

Termination Reason: All

Only: Classification Disinterest Joined Other Club
 Business Transfer Health Family Obligations
 Moved Deceased Duplicate record on ClubRunner
 Attendance None Given Other
 Business Pressure

Date Joined: This date range will filter who joined within the specified dates. This information is pulled from the member profile itself.

Date Joined: All
 Date joined in this date range: to

Date Terminated: This date range will filter who was terminated within the specified dates. This information is pulled from the member profile, if the field is populated.

Date Terminated: All
 Date terminated in this date range: to

Last Login: This date range will filter the members that last logged in to the club website within the specified dates.

Last Login: All
 Last login in this date range: to

Date Modified: This date range will filter all the members that had their profile modified within the specified dates. This information is pulled from the member profile. To view, click on the Active Members List link and then click on a member's name to access their profile. You will see this information at the bottom of the page under the Personal tab.

Date Modified: All
 Date modified in this date range: to

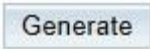
Club Position: This filter allows the member to select specific positions within the club. This information is pulled from the Edit Executives and Directors section.

Club Position: All

Only:

<input type="checkbox"/> Secretary	<input type="checkbox"/> Website Manager	<input type="checkbox"/> Club Administration
<input type="checkbox"/> President-Elect	<input type="checkbox"/> Vice President	<input type="checkbox"/> Service Projects
<input type="checkbox"/> President	<input type="checkbox"/> Immediate Past President	<input type="checkbox"/> The Rotary Foundation
<input type="checkbox"/> Treasurer	<input type="checkbox"/> Membership	<input type="checkbox"/> future vision
<input type="checkbox"/> Other	<input type="checkbox"/> Public Relations	<input type="checkbox"/> President

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



Clicking the **Generate** button will attempt to create the report based on your selections:

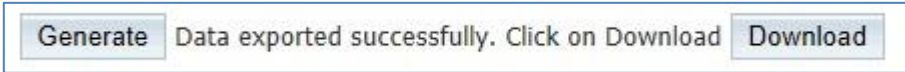
- If **no** data is found you will see a message at the top of the screen stating:



- If the report is **successful** you will see a message at the top of the screen stating:



- Scroll to the bottom of the page and you should see a **Download** button. Click on that to produce your **CSV** file.



Click the Download button



Click on the Open button

	A	B	C	D	E	F	G	H
1	Members	Title	First Name	Middle Name	Last Name	Nickname	Suffix	Gender
2	Active		John		Applegate			Male
3	Active		Sue		Baker			Female
4	Ex Member		Bill		Barnes			Male

The file will open for you to be able to see and edit it.

ii. Support & Training

Visit our **Support Center** at <http://clubrunner.helpserve.com> to access all resources available, including submitting a support ticket, searching the knowledgebase, downloading helpful “how-to” documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

<p style="text-align: center;"><u>Knowledgebase</u></p> <p>This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.</p>	<p style="text-align: center;"><u>Downloads</u></p> <p>This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.</p>
<p style="text-align: center;"><u>On-Demand Videos</u></p> <p>For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.</p>	<p style="text-align: center;"><u>Webinar Training</u></p> <p>We hold several webinars every week on the various modules of ClubRunner. These are open to any member of your club, and we recommend that you send your board members to attend.</p>
<p style="text-align: center;"><u>Submit a Ticket</u></p> <p>For technical support, use our Support Center to submit a ticket, or send an email to support@clubrunner.ca. Our turnaround time for email tickets is 2 business days.</p>	<p style="text-align: center;"><u>Community</u></p> <p>Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.</p>

For the latest ClubRunner updates, follow us on:

