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ClubRunner

Contacts: Quick Guide

June 2016

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Contents

Contacts Quick Guide

The Contacts module allows you to create a list of non-member contacts and sort these contacts by groups. For example, you could create a contact list group for prospective club members, club sponsors, media contacts, community partners and more. You can access these contacts and contact groups when sending any of your club communications.

Note: You will require an access level of 60 or higher in order to utilize the contacts when sending a bulletin. An access level of 50 or higher is needed when using contacts with email services.

Access the Contacts Module

1. To access the **Contacts** module, you must go to your club homepage and log in. Once you have done this click on **Member Area** on the top right.

2. Along the top of the screen you will see several grey tabs. Click the **Contacts** tab.
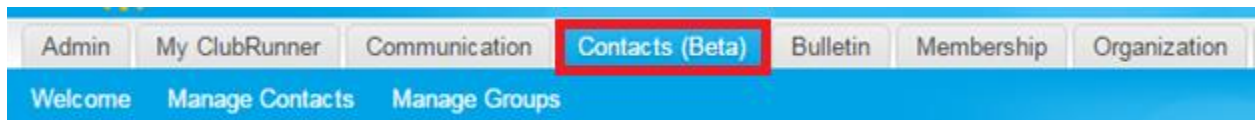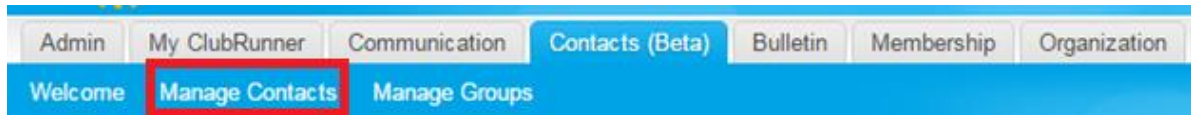

3. Then click on the **Manage Contacts** or **Manage Groups** links, depending on the functions you wish to access. Clicking **Manage Contacts** allows you to edit and add contacts. **Manage Groups** allows you to edit and add contact groups.
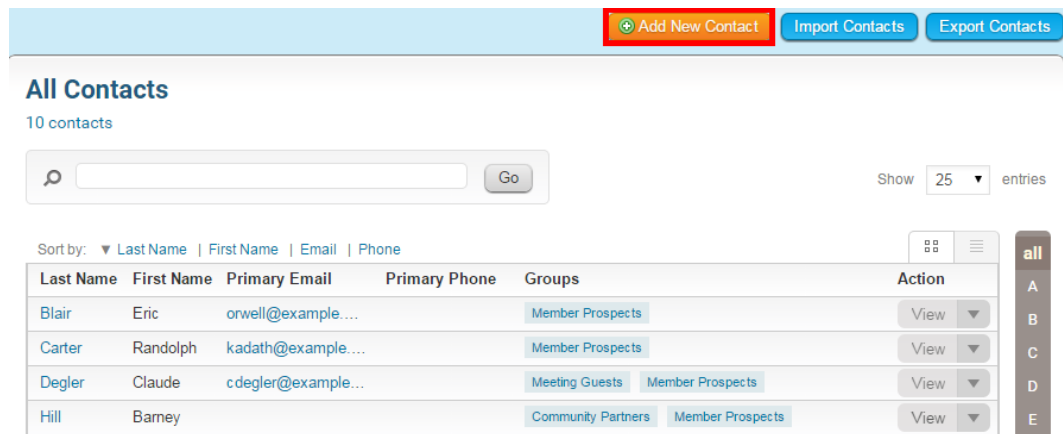
Managing Contacts

1. Add a New Contact

1. After accessing the Contacts module, click on the **Manage Contacts** button.

2. This brings you to the **All Contacts** page where you will see a list of all your existing contacts. To add a new contact, click on the **Add New Contact** button.

3. A pop-up window appears, in which you may enter your new contact details in the provided fields. Only the first name and last name fields are mandatory, but you must provide an email address if you wish to include this contact in club communications.
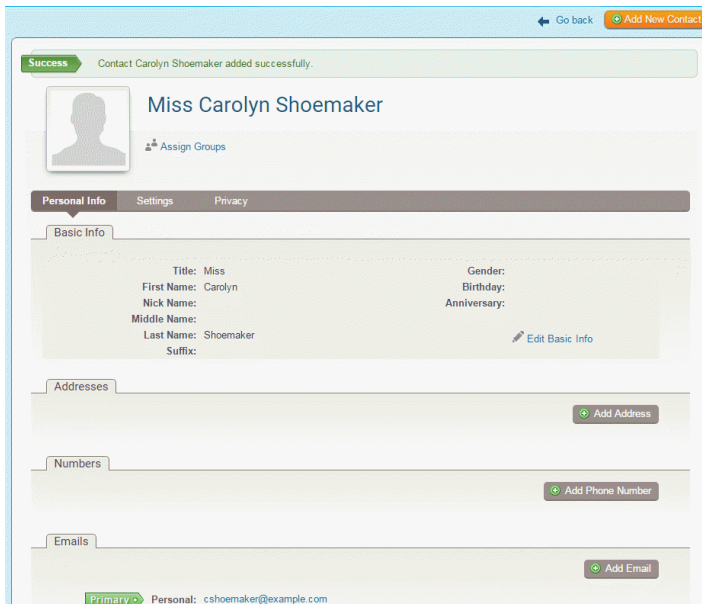
4. You must now affirm that you have permission from this contact to be able to communicate with them. When you're finished, click **Save** to add the contact, or **Cancel** to discard the information you have entered.

Note: Every email sent to your contacts contains an unsubscribe link, and your contacts may unsubscribe at any time.

5. Once you have entered and saved the contact details, you are taken to their **Contact Profile.** Here, you may edit the contact's address, contact details and privacy settings. You may also assign them to a contact group.

2. Add a Contact to a Contact Group using All Contacts

Contact groups are used to organize your contacts to make it easier to communicate with them. You may add a contact to any of your custom-created groups. Contacts cannot be added to system groups with this method, as those groups are automatically populated.

1. To add a contact to a group through the **All Contacts** page first access the **Contacts** module. Then, click on the **Manage Contacts** button.
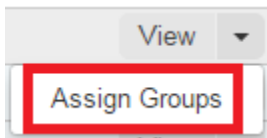

2. This brings you to the **All Contacts** page where you will see a list of all your existing contacts. Select the contact you wish to assign to a group. Under the **Action** column to the right of their name click on **View**.

3. Select **Assign Groups** from the drop down selections that appear.

3. A pop-up window appears. Click on the checkbox next to every group to which you want to assign the contact. When you're finished, click **Save.**

 4. The contact's group assignments are now displayed under the **Groups** column in the **Contacts** list.

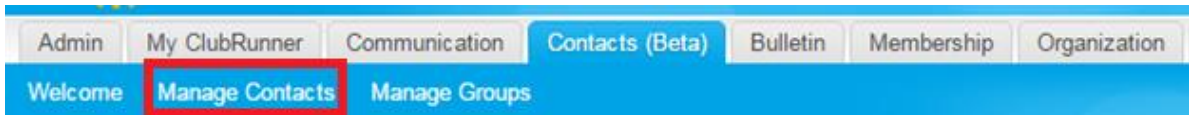

3. Edit a Contact's Personal Information

When you add a contact to your contacts list, a profile page for that contact is automatically generated. Through this profile page you can edit the contact's information and privacy settings. Follow the steps below to edit a contact's personal information.

1. Log in to your website and access the member area. Next, click on the **Contacts** tab.

2. Now, click on the **Manage Contacts** link.

3. This brings you to the **All Contacts** page where you will see a list of all your existing contacts.

4. Select the contact you wish to edit, and click the **View** link under the **Actions** column.
Alternately, you may click on the Contact's last name.

5. You are brought to the **Contact Profile**. Here, you may edit their basic contact details, as well as add email addresses and other contact options.
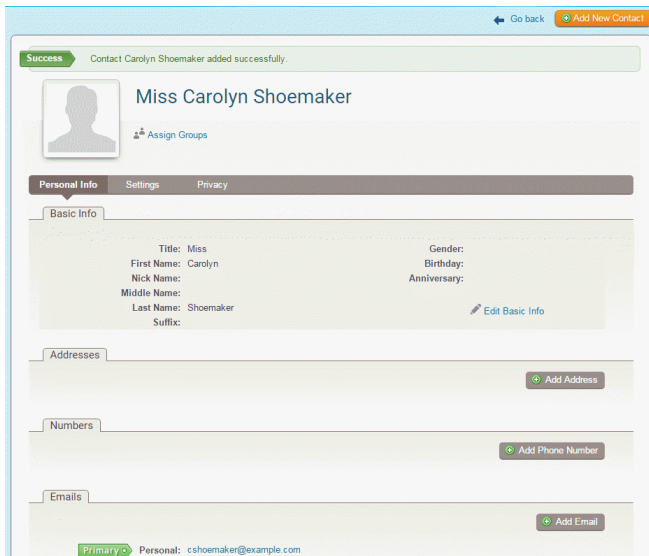
4. Editing the Contact's Basic Information

1. To edit the contact's basic details, click on **Edit Basic Info** in the **Basic Info** section of the profile.
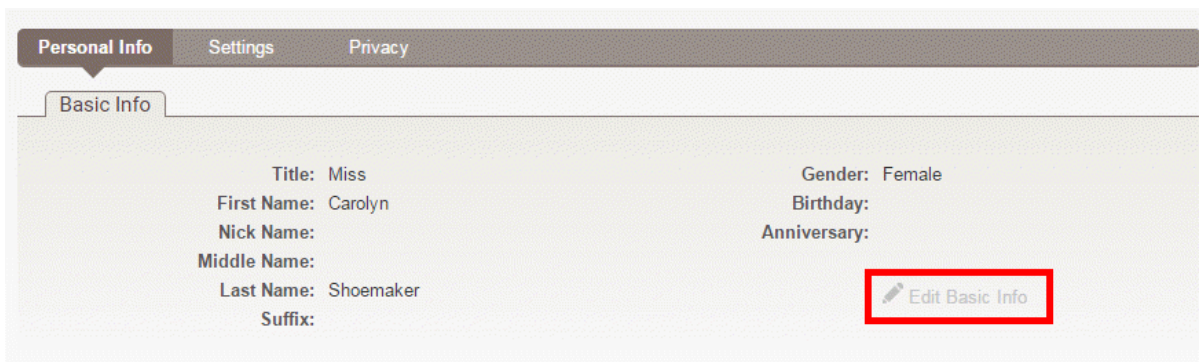
2. You may now make the required changes to the fields in the editing window that appears. When you're finished, click **Save.**
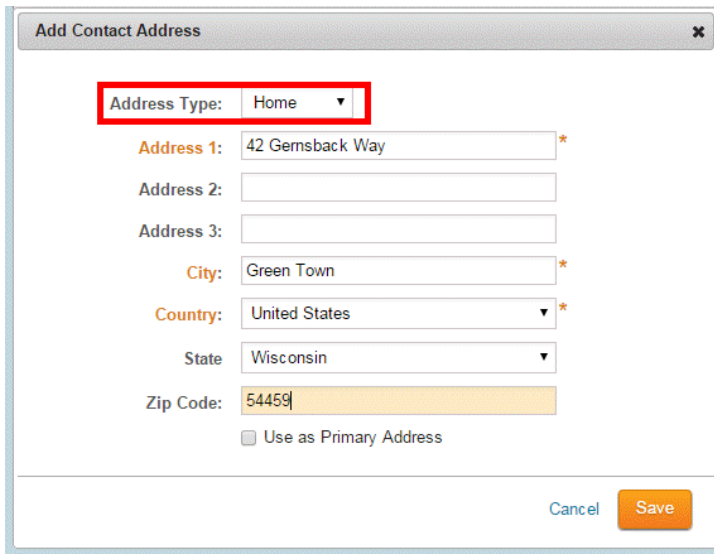
5. Add a Contact's Mailing Address

1. You may list a number of mailing addresses for a given contact. To add a new physical address, access the contact profile as above. Now, click the **Add Address** button under the heading **Addresses.**
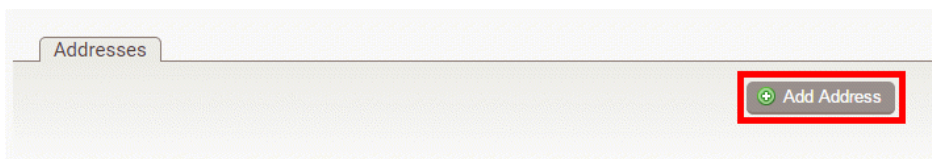
2. A window appears wherein you may enter the address details in the fields provided. Use the **Address Type** drop down menu to select whether the new address is a business or home address.

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3. Enter the relevant address in the fields provided.

4. As you may enter multiple addresses for a given contact you have the option to select a **Primary Address**. Click the check box to identify this address as the primary one. This step is optional. When you are finished, click **Save.**

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6. Add a Contact's Phone Number

1. It is possible to assign multiple phone numbers to a contact's profile. To edit the phone numbers associated with the contact, access the Contact profile as outlined above. Now, click on **Add Phone Number** under the **Numbers** heading.

2. In the pop up window that appears identify the number as either as a home number or a business number using the **Phone Type** field.

3. Enter the phone number in the fields provided. Remember to use the country calling code drop-drown to select the contact's home country, if needed. The calling code defaults to the country where your club is registered.

4. Click the checkbox beside **Use as Primary Number** to indicate this is the preferred telephone number for the contact.

5. When you are finished, click **Save.**

7. Add a Contact's Email Address

1. You can associate a number of different emails with your contact's profile. To edit a contact's emails, access the Contact profile as outlined above. Now, click on **Add Email** under the **Emails** heading.
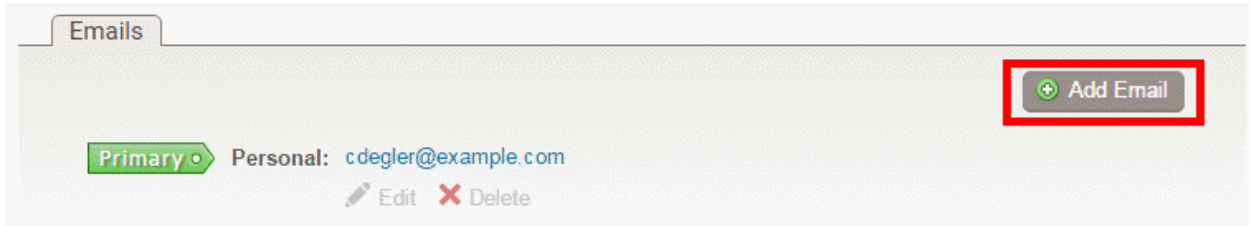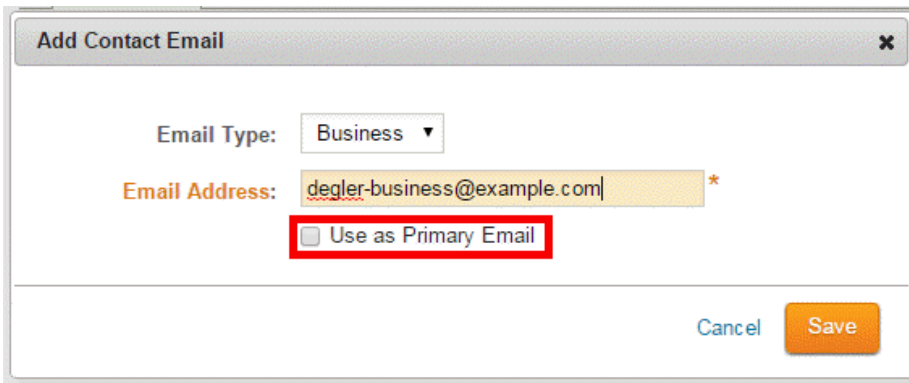
2. In the pop-up window that appears, select the **Email Type** from the drop-down field.
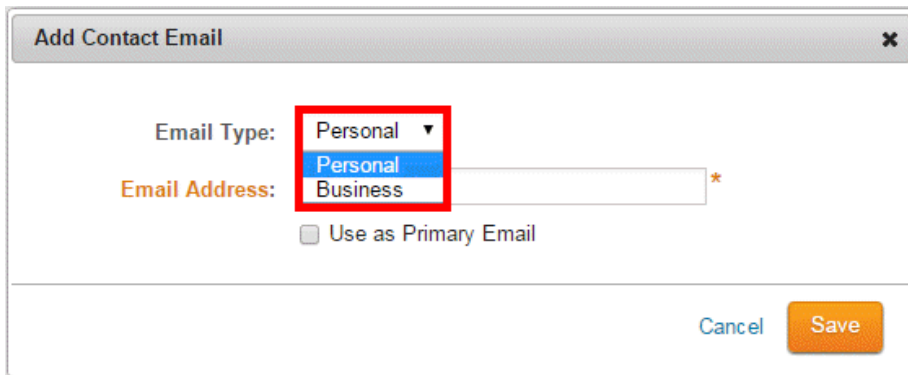
3. Now, enter the email address in the provided field.
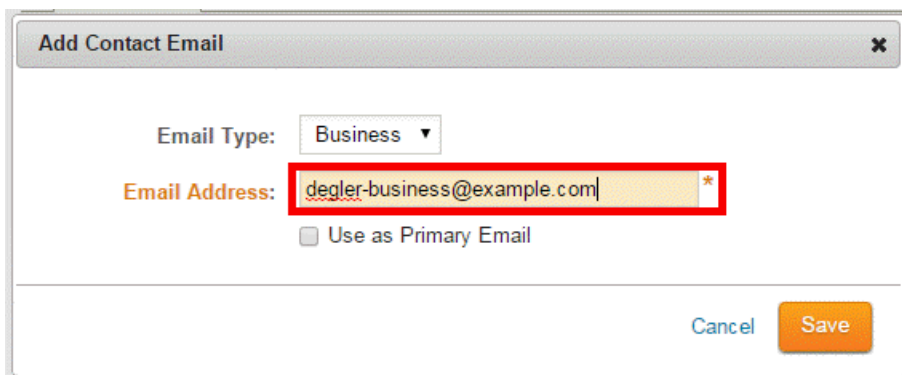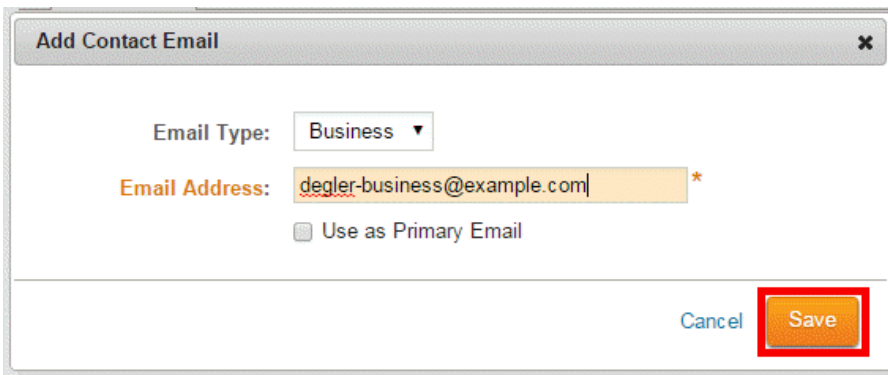
4. If you wish to identify this email as the main means of communicating with the client, click on the **Use as Primary Email** checkbox.

5. When you've finished, clicked **Save.**

8. Opting Out a Contact from Club Communications and Emails

1. To opt-out the contact from Club communications or emails, click on **Privacy** in the contact's profile.

2. You can click on **Edit** below **Receive emails?** or **Email Lists**.

3. If you clicked **Edit** below **Receive emails?** you will get the pop up below. This will change the contact to opt-out of all Club communications and emails. Once done click **Save**.

4. If you clicked **Edit** below **Email Lists** you will get the pop up below. This will let you select which Club communication the contact will no longer receive. Once done click **Save**.

9. Deleting a Contact

To remove a contact from your contacts list you must access the **All Contacts** page from the **Manage Contacts** link.

1. Log in to your website and access the member area. Next, click on the **Contacts** tab.

2. Now, click on the **Manage Contacts** link.

3. This brings you to the **All Contacts** page where you will see a list of all your existing contacts. Identify the contact you wish to delete, and then click on the check box to the left of their name.

4. Select Delete Selected at the bottom of the list. ***Note: Deleting a contact removes all information about the contact from your system. This information cannot be restored.***

Managing Contact Groups

1. System Groups

The use of contact groups allows you to organize your non-member contacts into lists reflecting their role in the life of your club. The module includes a number of pre-generated groups. These are known as **system groups.** System group contacts are automatically assigned to the system groups by ClubRunner. For example, when you add a sponsor to your site their contact details are extracted and added to the **Sponsors** system group as a new contact.

- **Meeting Guests:** These are the guests that have been inputted into the Attendance module as having attended a meeting.

- **Speakers:** Guests who have been featured as speakers at club events, as entered in the Attendance module.

- **Sponsors:** Members or non-members who advertise on the club website.

- **Volunteers:** Non-members who have signed up for volunteer tasks.

Note: You may edit the name and description of a system group. However, we suggest retaining the original name when possible to avoid confusion in your club communications and when dealing with ClubRunner technical support.

2. Custom Groups

System groups encompass many of your non-member contacts, but you also have the freedom to create your own contact groups. These are known as **custom groups**. With custom groups, you can organize non-member contacts in ways that are most effective for your specific needs. For example, your club may wish to have a contact group that includes all your local municipal politicians and another group for your charity partners. You are able to edit and delete your custom groups and add contacts from any source. It is also possible to add a contact from a system group to a custom group.

3. Create a New Custom Contact Group

To add a new group you must access the **Groups** page through the **Manage Groups** link.

> 1. Log in to your website and access the member area. Next, click on the **Contacts** tab.
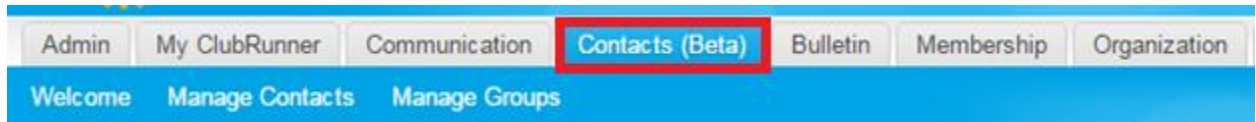
> 2. Click on the **Manage Groups** link.

> 3. You are now on the **Groups** page, where you may view and edit existing groups, or add a new group.

> 4. To create a new contact group, click on the **Add Contact Group** button on the right side of your screen.

Groups

☑ Include members and other users

Filter records: 🔍 [   ]

⊕ Add Contact Group

Name ▲	Number ▼	Type	Label Color	Actions
Bulletin Subscribers	1	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Charity Partners	3	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Media Contacts	3	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Meeting Guests	9	System	c	View Contacts | Assign Contacts | Edit | Delete
Member Prospects	16	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Sponsors	0	System	c	View Contacts | Assign Contacts | Edit | Delete
Volunteers	16	System	c	View Contacts | Assign Contacts | Edit | Delete

5. You are now on the **Add Group** page. Enter a short descriptive title for the new contact group in the **Group Name** field. This field is mandatory.

Group Name: [Media Contacts] *

Description: [   ]

Label Color: c c c c c
            c c c c

6. You have the option to enter a longer description of the group in the **Description** field.

Group Name: [Media Contacts] *

Description: [This group provides the contact details for members of the local media. Use this contact list for any press releases or special statements.]

Label Color: c c c c c
            c c c c

7. Next, you may select a **Label Color** for the group. This is used to color-code the contact lists, making it easier to immediately identify members of a given group. Simply click on the color you wish to assign to the group.

8. Now, click **Save.** You are then returned to the Groups page, where you will see your new group listed.

2. Delete a Contact Group

Deleting a group does not remove the members of that group from your contacts list. When a contacts group is deleted any members assigned to that group are unassigned from it.

Note: *If you delete all groups to which a contact has been assigned, they remain in your contacts as an unassigned contact.*

1. To delete a contact group, log in to your website and access the member area. Next, click on the **Contacts** tab.

2. Click on the **Manage Groups** link.

3. You are now on the **Groups** page, where you may view and edit existing groups, or add a new group.

4. Select the group you wish to remove. Click on the **Delete** link to the right of the group name, under the **Actions** column.

<mark>**Note:** You cannot delete a system group.</mark>

5. A pop-up window appears asking you to confirm your choice. Click **OK** if you wish to proceed. Click **Cancel** to return to the **Groups** screen without deleting your group.
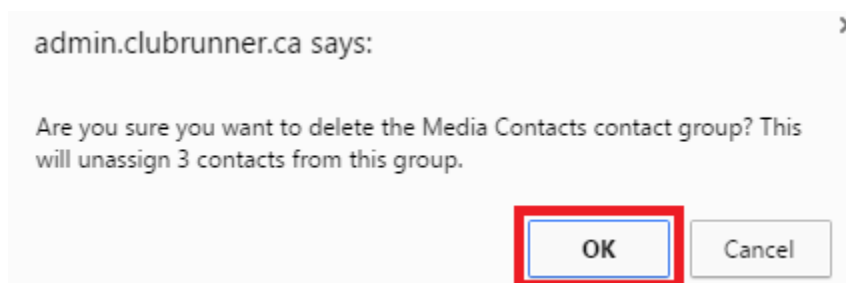
3. Assign Contacts to a Group with the Group Manager

You may assign a given contact to a custom group individually through their Contact Profile. If you wish to add more than one person at once to a group you should make use of the **Assign Contacts** link on the **Groups** page.

Note: You cannot add a contact to a system group.

1. To assign contacts to a contact group, log in to your website and access the member area. Next, click on the **Contacts** tab.

Admin	My ClubRunner	Communication	Contacts (Beta)	Bulletin	Membership	Organization
Welcome	Manage Contacts	Manage Groups				

2. Click on the **Manage Groups** link.

Admin	My ClubRunner	Communication	Contacts (Beta)	Bulletin	Membership	Organization
Welcome	Manage Contacts	Manage Groups				
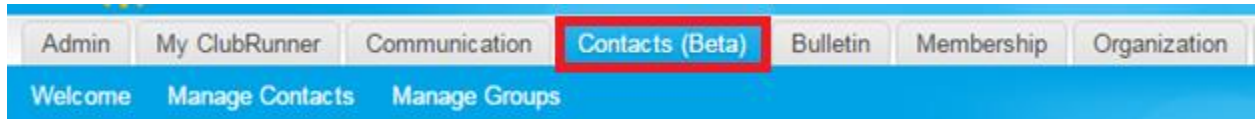
3. You are now on the **Groups** page. To add contacts to a group, click on the **Assign Contacts** link to the right of the group name, under the **Actions** column.

Name ▲	Number ▼	Type	Label Color	Actions
Bulletin Subscribers	1	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Charity Partners	3	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Media Contacts	3	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Meeting Guests	9	System	c	View Contacts | Assign Contacts | Edit | Delete
Member Prospects	16	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Sponsors	0	System	c	View Contacts | Assign Contacts | Edit | Delete
Volunteers	16	System	c	View Contacts | Assign Contacts | Edit | Delete

4. This brings you to the **Manage Contacts** page for the group. You will see a list of all your contacts. Simply click on the checkbox next to each name to add it to the currently selected group.

Select from the contacts below then click on Save.

	First Name ▲	Last Name ▼	
☑	Alfred	van Voght	Inactive Members
☑	Anne	Fielding	Meeting Guests
☐	Barney	Hill	Volunteers Meeting Guests Member Prospects
☐	Betty	Hill	Member Prospects

5. Click **Save** near the top right when you're finished.

Sending Email and Bulletins to Contact Groups

1. Sending Email to a Contact Group

If you have an access level of 50 or higher you may use contact groups when composing an email message.

1. In **Step 1** on the **Create Email** page you will see **Contact Groups** in the list of email recipients. Click on the checkbox next to **Contact Groups** if you wish to send the email to all your contacts.

2. To expand the list and select a given **Contact Group**, click on the plus to the left of the check box.

3. Now, select which group or groups you wish to email by clicking the checkbox next to their names.

*Note: Contacts not currently assigned to a group can be contacted by clicking **No Group.***
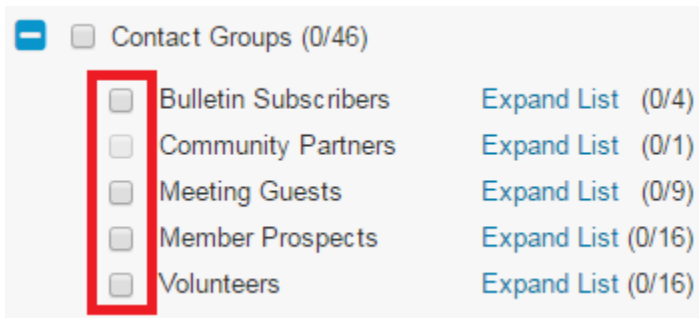
If the checkbox next to a group name is light grey in color it is inactive and you will be **unable to select it.** A contact group is inactive if none of the contacts within the group have an email address. In the image below the **Community Partners** custom group contains a contact without an email address. For this reason, the group cannot be selected.
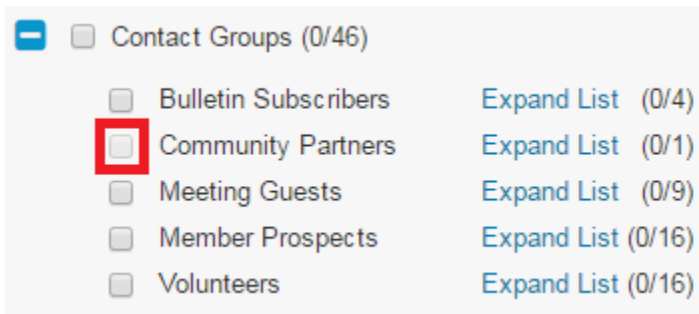
4. You can further individualize the contact recipients by clicking **Expand List** next to any of the Contact Groups.
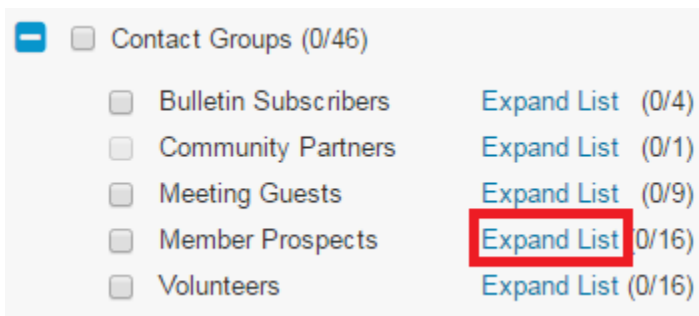
5. This displays a list of every contact in that contact group. Click the checkbox next to the name of each member you wish to email.

Alternately, you may wish to click **Select All** to send the email to every contact in the group with an active email address.

If the checkbox next to a given contact is greyed out, the box is disabled and cannot be selected. This indicates the contact does not have a valid email address.

6. Click **Done** when you have selected your email recipients. You may now continue to **Step 2** on the **Create Email** page.

2. Sending Bulletins to a Contact Group

If you have an access level of 60 or higher you may send bulletins to your contact groups, by following the steps below.

1. In **Step 2** on the **Send a Bulletin** page you may select the recipients of the bulletin. The Contact Groups appear at the bottom of the category list. Click on the checkbox next to **Contact Groups** if you wish to send the bulletin to all your contacts.

2. To expand the list and select a given **Contact Group**, click on the plus to the left of the check box.
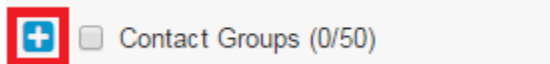
3. Now, select which group or groups to which you wish to send the bulletin by clicking the checkbox next to their names.

*Note: Contacts not currently assigned to a group can be contacted by clicking **No Group.***
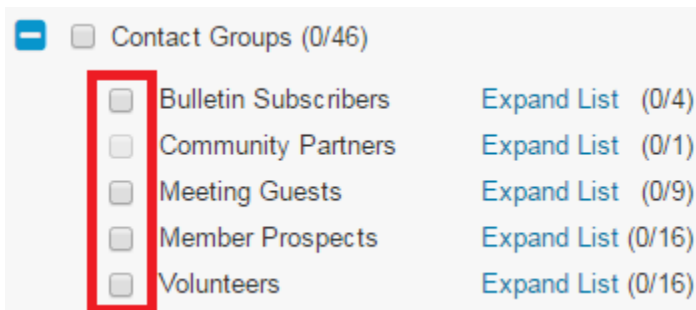
If the checkbox next to a group name is light grey in color it is disabled and you will be **unable to select it.** A contact group is disabled if none of the contacts within the group have an email address. In the image below the **Community Partners** custom group contains a contact without an email address. For this reason the group may not be selected.
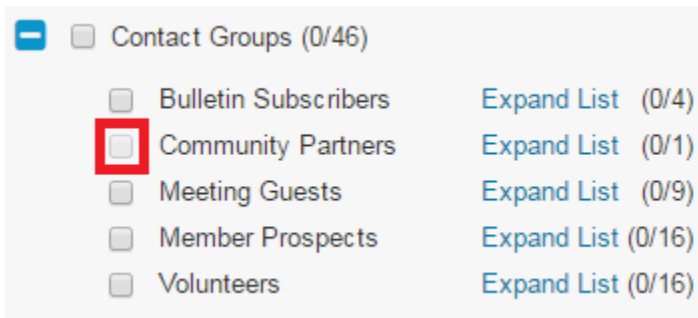
4. You can further individualize the contact recipients by clicking **Expand List** next to any of the Contact Groups.
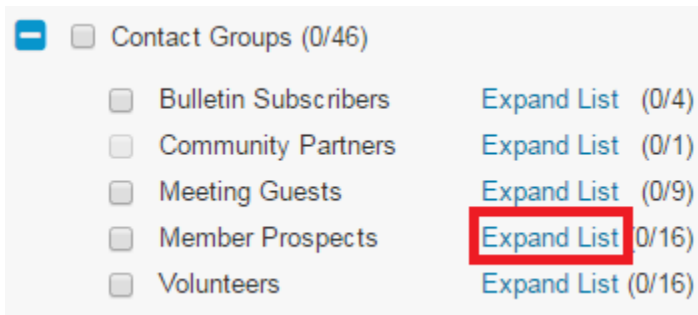
5. This displays a list of every contact in that contact group. Click the checkbox next to the name of each member to whom you wish to send the bulletin.
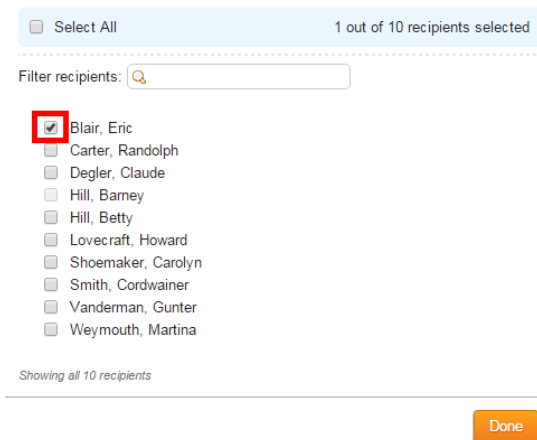
Alternately, you may wish to click **Select All** to send the bulletin to every contact in the group with an active email address.

If the checkbox next to a given contact is greyed out, the box is disabled and cannot be selected. This indicates the contact does not have a valid email address.

6. When you are finished selecting bulletin recipients, click **Done**. You may now continue to **Step 3** on the **Send a Bulletin** page.
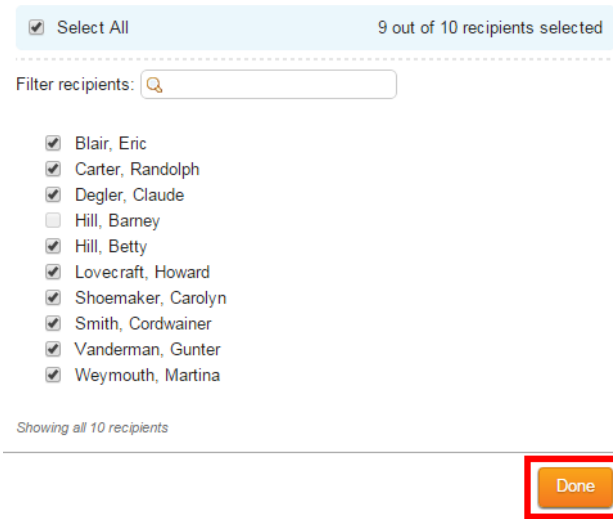
Importing and Exporting Contacts

1. Importing Contacts

You have option to import a list of contacts from a CSV file. These files are standard for most spreadsheet programs, such as Microsoft Excel. This feature allows you to easily import an existing list of non-member contacts and integrate it with your ClubRunner website.

1. To import your contact list you must log in to your member site. Next, click on the **Contacts** tab.
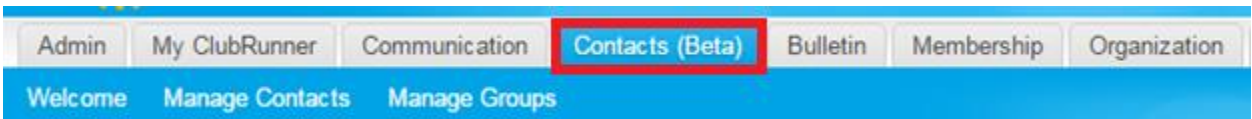
2. Now, click on the **Manage Contacts** or **Manage Groups** link. Either link will give you access to the **Import Contacts** tool.
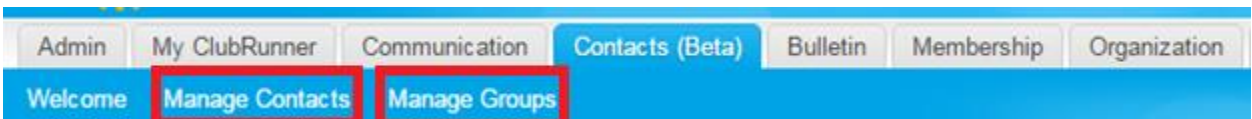
3. At the top right of the page you will see a blue **Import Contacts** button. Click on this button.
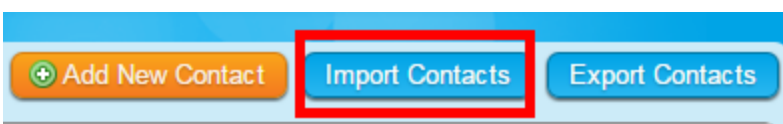
4. This brings you to the **Import Contacts** page. On this page you have the option to download a CSV template compatible with ClubRunner. To download our template, click **Download Template File** in the middle of the page. If you already have an appropriate file, proceed to the next step.

Download Template
If you do not already have a .CSV file created (i.e from Outlook), here is a template you can use:

Download Template File

Template Example

First Name	Last Name	Business Address1	Business City	Business State	Business Zip Code	Business Country	Cell	Email

5. Click the **Choose File** button to upload a file from your computer or local network. Remember, this must be a .CSV file.

Note: *Depending on your browser, the* **Choose File** *button may instead be labelled* **Browse.**

Select the .CSV file to upload: Choose File No file chosen
File Encoding: Auto ▼

6. You now have the option specify the file's encoding. If you are unsure of this select **Auto**. If this results in an error you may select a different encoding and upload the file again.

Select the .CSV file to upload: Choose File AllContacts (3).csv
File Encoding: Auto ▼

7. You must now confirm that you have permission to email all the contacts in this file. Click on the checkbox provided.

Note: *You will be unable to proceed with the import if you do not click the confirmation.*

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Confirm that you have permission to email all contacts

☑ You must have permission from each contact to be able to communicate with them. By checking this box, you confirm that the contact has opted in to receiving emails from you. Note that the contact can opt-out at any time via an Unsubscribe link.

Cancel   Next

8. Click **Next** to upload the file.

Cancel   Next

9. You are now asked to confirm the import of the contacts. You may review how the system has matched each field in your file to our own system. If a given field has been mismatched, it will appear here, marked with this icon: ⚠

Select ▼
Nickname ⚠
Remove
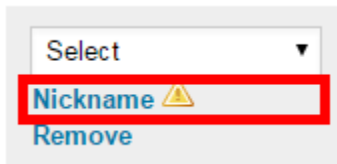
10. You may choose to match the missing field to an existing field. Click **Select** to activate a drop down menu of options.

Select ▼
Nickname ⚠
Remove
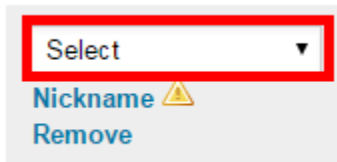
11. Alternately, you may choose to delete the field by clicking on **Remove.**

Select ▼
Nickname ⚠
Remove
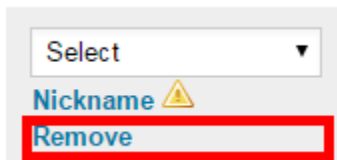
12. Now you may review your contact date. You will see a list of contacts that have been automatically extracted from your CSV file. If you wish to remove a contact click the checkbox to the left of their name.

Note: In order to be successfully imported a contact MUST have an email address associated with their name.

	First Name	Middle Name	Last Name	Suffix	Business Address1	Business Address2	Business Address3	Business City	Business State
☑	Howard	Phillip	Lovecraft						
☑	Eric		Blair						
☑	Randolph		Carter						
☑	Martina		Weymouth						

13. Click **Next** when you are ready to proceed.

Cancel   Next

14. On the next page you will see a list of valid imported contacts. If any contacts could not be imported they will be listed here, along with a reason for the import failure.

Title	First Name	Middle Name	Last Name	Address	Phone	Email
	Howard	Phillip	Lovecraft			hplovecraft@example.com
	Eric		Blair			orwell@example.com
	Randolph		Carter			kadath@example.com
	Martina		Weymouth			weymouth@example.com

15. You are now asked to choose the groups to which you wish to assign your imported contacts. Click the checkbox next to each relevant group.

Note: All contacts will be assigned to the same group at this stage. If you wish to assign these contacts to different groups, do not select a group in this step.

Groups

☐ Community Partners

☐ Media Contacts

☐ Member Prospects

☐ Sponsors

16. When you're ready click **Finish.**
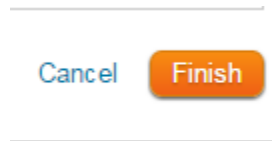
2. Exporting Contacts

You have option to export a list of contacts as a CSV file. These files are standard for most spreadsheet programs, such as Microsoft Excel. This feature allows you to share your ClubRunner created contact lists as desired and to keep a record of contacts separate from your website.
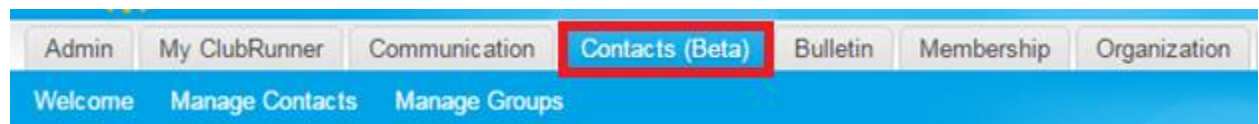
Note: You may export all your contacts or only those contacts in a given contact group. You may also filter the contacts you wish to export in a given group.

1. To export your contact list you must log in to your member site. Next, click on the **Contacts** tab.

2. Now, click on the **Manage Contacts** or **Manage Groups** link. Either link will give you access to the **Export Contacts** tool.

3. At the top right of the page you will see a blue **Export Contacts** button. If you wish to export **ALL CONTACTS** you may click on this button now. If you wish to export the contacts in a given contacts group, proceed to step 5.
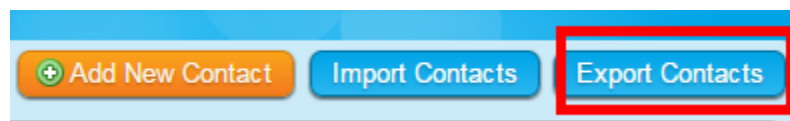
4. A CSV file is automatically generated and downloaded to your computer. On most systems you will be able to locate this file in the Downloads folder, but this may vary according to your operating system and personal browser settings.
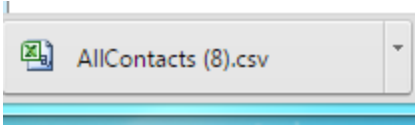

5. If you wish to export a specific contact group, you must be on your **Groups** page.
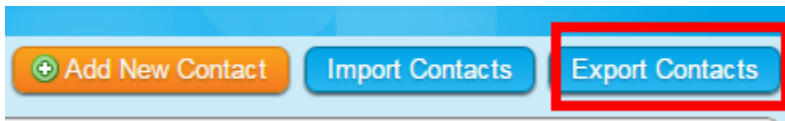

6. Click on **View Contacts** to the right of the contact group you wish to export.

7. This brings you to list of contacts within that group. Now, click on the **Export Contacts** button above the list.

8. A CSV file is automatically generated and downloaded to your computer. On most systems you will be able to locate this file in the Downloads folder, but this may vary according to your operating system and personal browser settings.
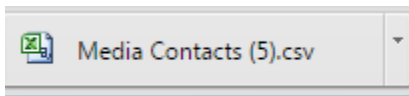
3. Exporting a Filtered Contact Group

You may further filter an export file to include specific members of a Contact Group. These files are standard for most spreadsheet programs, such as Microsoft Excel. This feature allows you to share your ClubRunner created contact lists as desired and to keep a record of contacts separate from your website.

1. If you wish to export a filtered list generated from a specific contact group, you must be on your **Groups** page.

2. Click on **View Contacts** to the right of the contact group you wish to export.

Groups

Name ▲	Number ▼	Type	Label Color	Actions
Bulletin Subscribers	2	System	c	View Contacts | Assign Contacts | Edit | Delete
Community Partners	1	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Guests of meetings	1	System	c	View Contacts | Assign Contacts | Edit | Delete
Inactive Members	0	System	c	View Contacts | Assign Contacts | Edit | Delete
Member Prospects	10	Custom	c	View Contacts | Assign Contacts | Edit | Delete
Sponsors	0	System	c	View Contacts | Assign Contacts | Edit | Delete
Volunteers	0	System	c	View Contacts | Assign Contacts | Edit | Delete

⊕ Add Contact Group

3. This brings you to list of contacts within that group. To filter this list, enter your filter search term in the search field above the list of contacts.

Contacts in Member Prospects Group

10 contacts

Show 25 ▼ entries

Sort by: ▼ Last Name | First Name | Email | Phone

Last Name	First Name	Primary Email	Primary Phone	Groups	Action
Blair	Eric	orwell@example.com			View ▼
Carter	Randolph	kadath@example.c...			View ▼
Degler	Claude	cdegler@example....		Guests of meetings	View ▼
Hill	Barney	barneyhill@exampl...			View ▼
Hill	Betty	bettyhill@example....			View ▼

all
A
B
C
D
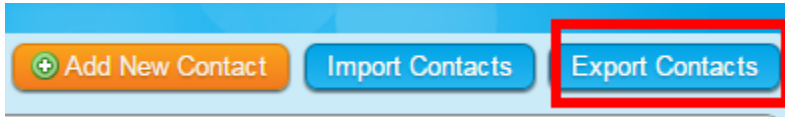E
F

4. Once you have entered your search term, click **Go.**

🔍 hill   Go

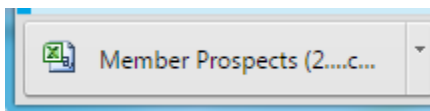5. You will now see a contact list filtered according to the search term.

6. Now, click on the **Export Contacts** button above the list.

7. A CSV file is automatically generated and downloaded to your computer. On most systems you will be able to locate this file in the Downloads folder, but this may vary according to your operating system and personal browser settings.

Support and Training

Visit our **Support Center** at http: www.ClubRunnerSupport.com to access all resources available, including submitting a support ticket, searching the Knowledge Base, downloading helpful "how-to" documents and viewing on-demand demos. The following is a list of all the various resource guides available to you.

Knowledgebase	Downloads
This is where you will find access to hundreds of articles answering frequently asked questions on how to do virtually everything on ClubRunner.	This area contains useful documents referenced within this guide, including the Member Cheatsheet, access rights matrix, presentation agenda, and more.
On-Demand Videos	Webinar Training
For frequently asked questions on how to do certain things on ClubRunner, we have recorded video tutorials available for you to view.	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.
Submit a Ticket	Community
For technical support, use our Support Center to submit a ticket, or send an email to **support@clubrunner.ca**.	Start a conversation with other ClubRunner customers on best practices, tips and tricks, feature

Our turnaround time for email tickets is 2 business days.	enhancements and more. The discussion forum is a great place to learn how other customers are utilizing ClubRunner to manage their club website.

For the latest ClubRunner updates, follow us on: