

## How do I download member data?

Michael C. - 2021-02-25 - Reports

With ClubRunner, you have the ability to generate a document containing membership data. You can generate this spreadsheet according to the fields and filters you define, and save those parameters for the future.

1. To download member data, you must go to your club homepage and log in. Then, click on **Member Area** on the top right of the page.
2. Along the top of the member area you will see several tabs. Click on the **Membership** or **Reports** tab.
3. Then, click on **Download Member Data** in the tabs just below.
4. You are now on the **Download Member Data page**. Here, you can choose from a large number of variables to download. Click on the information fields you wish to extract in the download.

### 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	

5. Now, select the filters you would like to apply. In the example below, you have selected to only download information about active members and staff user types. You may also filter according significant dates for the membership, such as the date they joined your club, or the last time they updated their profile information.

2) Customize the filters you would like to apply:

Reset All

Member Type:  All

Only:  Active  Active - Satellite  Active - Corporate

Honorary

Other Users:

Exchange Student  Corporate Member  Rotaract

Staff  Prospective Member  Past Honorary (Ex Member)

Other  Visiting Member  Past Honorary (Deceased)

Leave of Absence  Interact  Other-test

Inactive (Former) Members

6. You have the option to save the parameters of the search for use in the future. If you choose to do this, enter a name for the search in the field provided.

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

Save this search for future use?  No

Yes:

Generate

7. When you have finished, click **Generate** to create a CSV format file with the data you have requested. This format is compatible with most spreadsheet software.

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

Save this search for future use?  No

Yes:

Generate

8. The page will then refresh. Scroll down to the bottom of the page and click the **Download** button beside generate to download the file.

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

Save this search for future use?  No

Yes:

Data exported successfully. Click on Download

Download Generate

9. If you have saved the search, you will find it is available in the top-left of the Download Member Data page. Click the name given in Step 6 for the search, to apply the filter settings. You can also remove saved searches by clicking the X icon, to the right of the search.

The image shows a screenshot of a user interface. At the top, there is a blue header bar with the text "My Saved Searches". Below this, there is a light blue box containing the text "Only Active Members and Staff (X)" where the "X" is in red. Underneath, it says "Click on X to remove your saved search". Below this is a yellow header bar with the text "Help". At the bottom, there is a light yellow box with the text "Learn more about how to extract your member data".

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