

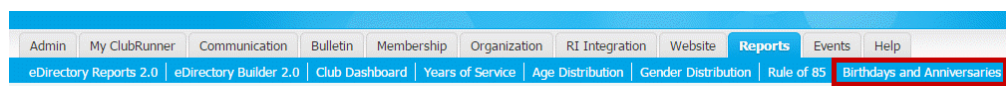
What is the birthday & anniversary report?

Michael C. - 2024-11-20 - Reports

The Birthday and Anniversaries module allow clubs to generate a report to view the birthday and anniversary dates for members and their spouses. This report is included with the ClubRunner package. Within the District and Club version of ClubRunner, the report feature can be found on the top horizontal blue menu bar.

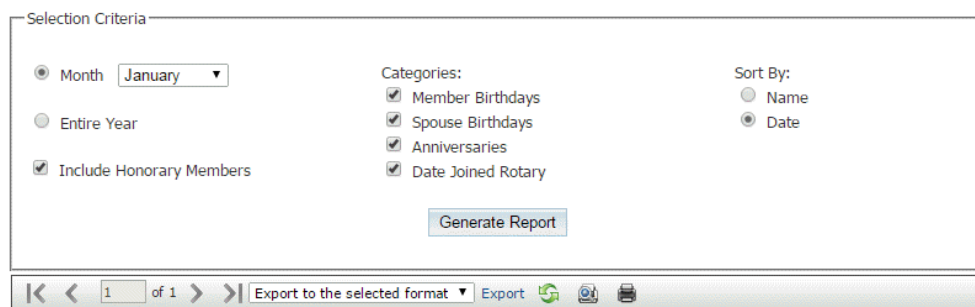
1. Log in to your site. Then, click the **Reports** tab and then select **Birthdays and Anniversaries**.

Note: The Birthday & Anniversaries link is disabled for members with access levels between 60 and 90.



2. You are now viewing the **Birthday & Anniversary Report** page.

Birthday & Anniversary Report

A screenshot of the 'Birthday & Anniversary Report' generation interface. The form is titled 'Selection Criteria' and contains several options. On the left, there are radio buttons for 'Month' (selected) and 'Entire Year', with a dropdown menu showing 'January' next to the 'Month' option. Below these is a checked checkbox for 'Include Honorary Members'. In the center, under the heading 'Categories:', there are four checked checkboxes: 'Member Birthdays', 'Spouse Birthdays', 'Anniversaries', and 'Date Joined Rotary'. On the right, under the heading 'Sort By:', there are two radio buttons: 'Name' and 'Date' (selected). A 'Generate Report' button is located at the bottom center of the form. Below the form, there is a navigation bar with back and forward arrows, a page indicator '1 of 1', and an 'Export to the selected format' dropdown menu followed by 'Export' and icons for PDF, CSV, and Print.

3. By default, the report will generate based on the current month. To create a custom report, you may filter by dates and categories. First, you may select to view a given month, or the entire year.

Birthday & Anniversary Report

Selection Criteria

☒ Month January ▾

☐ Entire Year

☒ Include Honorary Members

Categories:

☒ Member Birthdays

☒ Spouse Birthdays

☒ Anniversaries

☒ Date Joined Rotary

Sort By:

☐ Name

☒ Date

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4. Now, check the boxes next to those categories you wish to view in the report.

Birthday & Anniversary Report

Selection Criteria

☒ Month January ▾

☐ Entire Year

☒ Include Honorary Members

Categories:

☒ Member Birthdays

☒ Spouse Birthdays

☒ Anniversaries

☒ Date Joined Rotary

Sort By:

☐ Name

☒ Date

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5. Next, choose whether you wish to sort the report by **Name** or **Date** and click **Generate Report**.

Birthday & Anniversary Report

Selection Criteria

☒ Month January ▾

☐ Entire Year

☒ Include Honorary Members

Categories:

☒ Member Birthdays

☒ Spouse Birthdays

☒ Anniversaries

☒ Date Joined Rotary

Sort By:

☐ Name

☒ Date

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6. A preview of the report will appear at the bottom of your screen. The results report will display the name of the club, method of sorting, categories and date. This report can be printed or exported for your records.

Rotary Club of Green Town

Birthday & Anniversary Report

Sorted By Date



Member Birthdays

Name	Date
Merril, Judith	Jan 21

Spouse Birthdays

Name	Spouse Of	Date
No spouse birthdays found.		

7. You also have the option to generate a report document, using the tool bar below the top field of the Birthday & Anniversary Report screen. Click on the drop down menu to choose your preferred format.



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