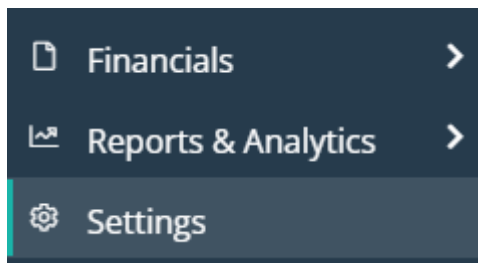


## How can I control which Smart Lists show in modules?

Ryan A. - 2025-05-13 - Smart List

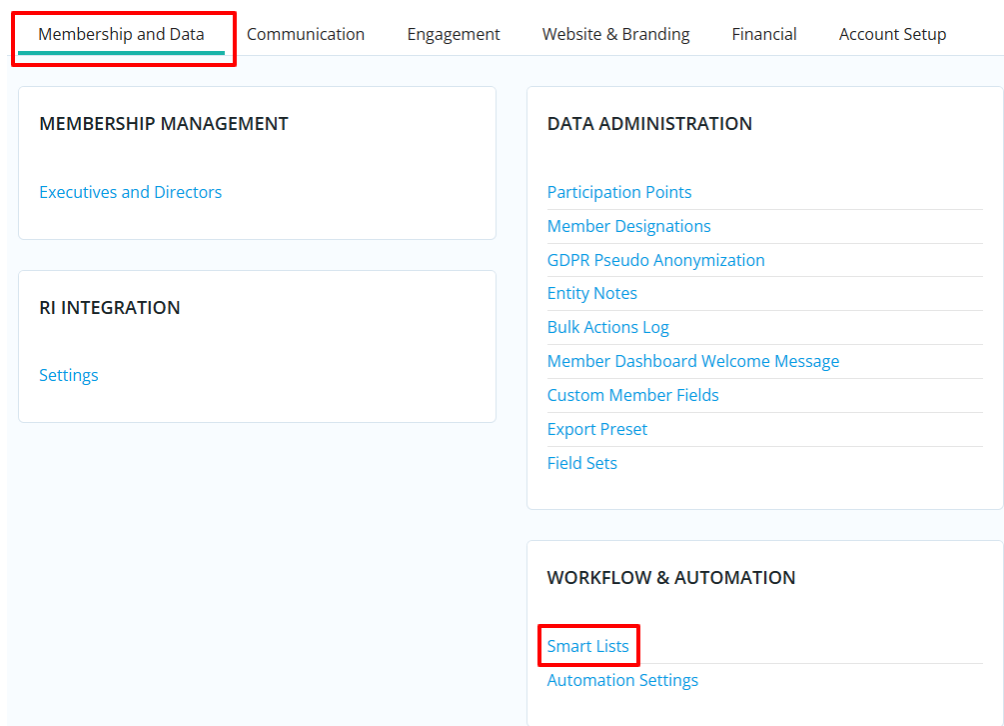
Smart Lists can be set up to only be accessible in specific modules of the ClubRunner system.

1. To begin, log in to your account through your club homepage, then click on **Member Area** on the top right under your club banner. [Alternatively, click here to go directly to the ClubRunner login page.](#)
2. Once logged in, click on **Settings** in the left-hand side menu.



3. On the settings "Membership and Data" page, look for the "Workflow & Automation" section and click the **Smart Lists** link.

### Membership and Data



4. You will now see all the Smart Lists that exist in the account. You can click the **plus (+) icon** to expand each Smart List to show the current access level settings.

To edit the access level settings, click the **down arrow** button and select **Edit** next to the Smart List you'd like to edit.

## Smart Lists

Display  records [+ Add](#)

NAME ^	DESCRIPTION v	RECORD TYPE v	ACTIONS
<a href="#">Active and Honorary Members (All)</a>	List of all active and honorary members with any member type.		<div> Edit  Copy  Hide</div>
<div>Search Criteria: Match: <span>All</span> Filter by <b>Membership Subscription</b> Access Level: <span>Club Admin 30</span> <span>Club President 40</span> <span>Club Executive 50</span> <span>Club Editor 60</span> <span>Club Member 70</span></div>			
<a href="#">Active and Honorary Members (All) copy</a>	List of all active and honorary members with any member type.	Person	
<a href="#">Active and Honorary Members by Designations</a>	List of all active and honorary members with any member type grouped by designations.	Person	

Please note that not all Smart Lists can be edited, as some are system-generated and will show a message stating that they are read-only and editing is disabled.

## Edit Smart List [Active and Honorary Members \(All\)](#)

List of all active and honorary members with any member type.

Person

**Read-Only Mode:** Editing of this smart list is disabled.

5. Now you're on the edit page for the selected Smart List. On the right-hand side of the page in the "Smart List Settings" section, on the "Properties" tab, you'll find the Access controls.

## Edit Smart List Demo List

List of all active and honorary members with any member type.

Person

Preview Save

Membership Subscriptions

Persons with subscriptions that match All criteria below.

Subscription Status is one of

Active Active (Cancelled) Active (Grace)

Add Criteria

Add Filter

Smart List Settings

Properties Export

Smart List Details

Name \* Demo List

Description List of all active and honorary members with any member type.

Match Criteria All

Access

Permissions ? Club Admins Club Presidents Club Executives Club Editors Club Members

Available In \* ? Email Export

6. **Permissions:** This allows you to set which member levels have access to the Smart List. You can select as many options from the drop-down list as needed. Clicking the "X" will remove an option from the list.

### Permissions ?

Club Admins Club Presidents

Club Admins

MER Read Only Access

Club Presidents

Club Executives

Club Editors

Club Members

Club Restricted Members

Club No Access

7. **Available In:** This controls which modules of the account the Smart List is available in. You can select as many options from the drop-down list as needed. Clicking the "X" will remove an option from the list.

Available In \*?

Email × Export ×

Email

Groups

Export

Batch Order

8. Remember to click the **Save** button in the upper right-hand corner of the page to save any changes you make to the Smart List access settings.

## Edit Smart List Demo List

List of all active and honorary members with any member type.

Person

Preview

Save