ClubRunner

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[NOVA] How can I control who can access Smart Lists?

Ryan A. - 2025-08-26 - Smart List

Smart Lists can be set up to only be accessible by specific members of your club based on their access level.

- 1. 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

Membership and Data	Communication	Engagement	Website & Branding	Financial	Account Setup
MEMBERSHIP MANAGEMENT		DATA ADMINISTRA	ΓΙΟΝ		
Executives and Directors			Participation Points		
			Member Designations		
			GDPR Pseudo Anonym	nization	
RI INTEGRATION			Entity Notes		
REINTEGRATION			Bulk Actions Log		
Settings			Member Dashboard Welcome Message		
Settings			Custom Member Fields		
			Export Preset		
			Field Sets		
			WORKFLOW & AUT	OMATION	
			Smart Lists Automation Settings		

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 and it's filters. 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

٩	Search	Display 25	records 🕒 Add
	NAME *	DESCRIPTION 🗸	RECORD TYPE - ACTIONS
	Active and Honorary Members (All)	List of all active and honorary members with any member type.	Ţ ↓ Edit
		Match: All Filter by Membership Subscription	Copy
	Access Level:	Club Admin 30 Club President 40 Club Executive 50 Club Ed Club Member 70	tor 60
Ð	Active and Honorary Members (All) copy	 List of all active and honorary members with any member type. 	Person
÷	Active and Honorary Members by Designations	List of all active and honorary members with any member type grouped by designations.	Person

Note

Please note that not all smart lists can be edited, 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 side of the page in the "Smart List Settings" section, "Properties" tab, you'll find the Access controls.

Edit Smart List Demo List

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

	Preview Save
	> Smart List Settings
Membership Subscriptions ×	Properties Export
Persons with subscriptions that match \fbox{All} \checkmark criteria below.	Smart List Details
	Name *
Subscription Status v is one of v	Demo List
Active x Active (Cancelled) x	Description
Active (Grace) X 🗸 🗸	List of all active and honorary members with any member type.
Add Criteria	Match Criteria
	All ~
Add Filter -	Access
	Permissions 🔞
	Club Admins × Club Presidents × Club Executives × \lor
	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 dropdown list as needed. Clicking the "**X**" next to the access level title will remove that option from the list. Once you select a certaing Permission option, only members with that access level will be able to use this Smart List. As an example: "Club Executives" permission means Club Administrators will not see this Smart List option when composing an email, or exporting certain information, until this access level is added under permissions, too.

Permissions 🔞				
Club Admins ×	Club Presidents	; ×	~	
Club Admins				
MER Read Only Access				
Club President	s			
Club Executives				
Club Editors				
Club Members				
Club Restricted Members				
Club No Access	5			

7. Available In: This controls which modules of the account the smart list is available in. You can select as many options from the dropdown 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 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