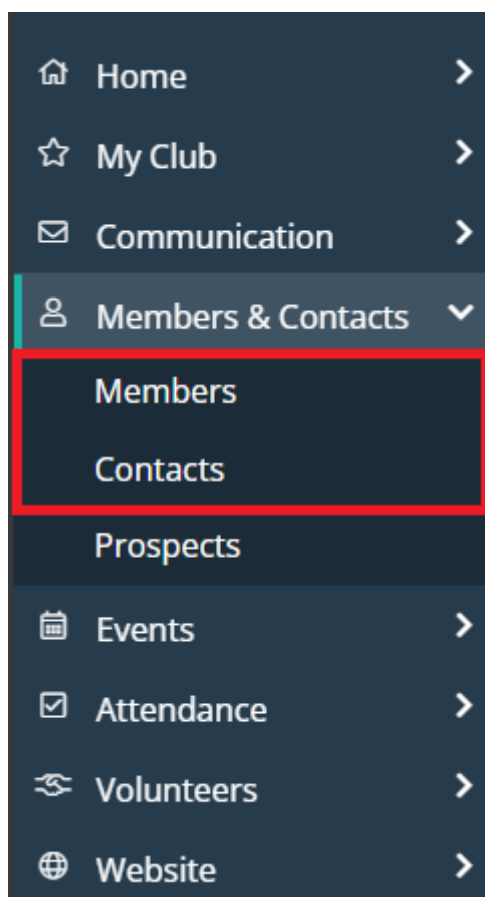


[NOVA] How do I create and assign tags to members and contacts?

Michael M. - 2025-08-26 - [Members & Contacts](#)


You can assign tags to member or contact records to help provide more information regarding their history with your club and to help organize records to use as email recipients. This support article will show you how to create and assign tags to member and contact records.

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. On the left hand menu, click the arrow to the right of **Members & Contacts**, then click on **Members** or **Contacts** depending on which type of record you wish to add tags to.



3. Locate the record you wish to add tags to and click the **drop-down arrow** on the right-hand side, next to the View button. Then click **Assign Tags**.

☐



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artist
bbq organizers
boardnominee
club of toronto
donor
foundation committee
potential speakers

Rotary Number
 Member
 Type
 Date Joined
 Club
 Role

123456
 Standard
 May 27, 2023 2 years ago
 30

Balance

View

- Send Email
- Change Status
- Assign Tags
- Send Update Request
- Send Login Instructions
- Send Account Statement

- In the window that appears, you may add or remove any existing tags, or click into the “Tags” field to type and create a new tag. Click Save when you’ve set the desired tags.

Assign Tags

Tags

artist x
 bbq organizers x
 donor x
 foundation committee x
 potential speakers x

Cancel
 Save

Note

If you are managing tags for a prospective member, you will also see options to edit their Prospect Status and Prospect Score in this window.

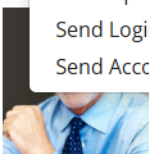
- You may also edit tags for multiple records at the same time. To do so, check the boxes to the left-hand side of the records’ information, then click the **Bulk Actions** menu followed by the **Edit** option.

Active & Honorary
 Active
 Honorary
 Past

☒
☒
☒

Bulk Actions
 Email
 Export

Edit
 Send Update Request
 Send Login Instructions
 Send Account Statement




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bbq organizers
calgary2025
casinonight
prospect
volunteer

Rotary Number
 Member
 Type
 Date Joined
 Club
 Role

1234567
 Standard
 Jun. 25, 2025 2 months ago
 30



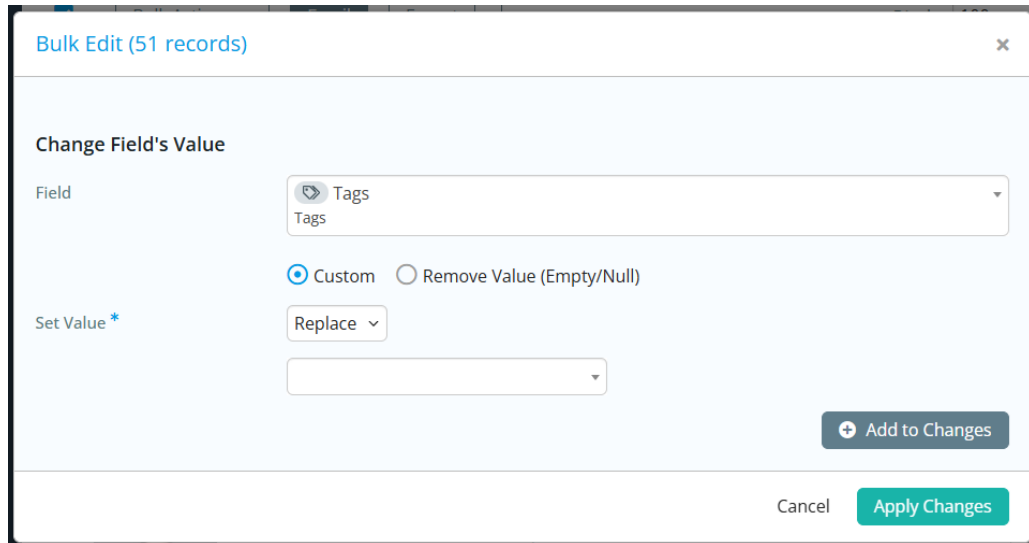
Sara James Alberts
crzachery+salbertsf@mail.com

PDG
PP
na
sarah
volunteer

Member
 Type
 Date Joined
 Club
 Role

Satellite
 Jul. 17, 2024 one year ago
 30

6. In the following window, you may set multiple changes to tags for the records you selected and apply them all at once.



The image shows a 'Bulk Edit (51 records)' window. Under the heading 'Change Field's Value', the 'Field' is set to 'Tags'. There are two radio button options: 'Custom' (which is selected) and 'Remove Value (Empty/Null)'. Below these, the 'Set Value' section has a dropdown menu currently set to 'Replace', followed by an empty text input field. At the bottom right of the main area is a button labeled '+ Add to Changes'. At the very bottom of the window are two buttons: 'Cancel' and 'Apply Changes'.

Toggle the tag changes you wish to process, then click **Add to Changes** to queue the changes to apply to the selected records. You may choose from the following options:

- Remove Value (Empty/Null) - This option will remove all tags from the selected records.
 - Custom (Replace) - This option will remove all tags from the selected records and replace them with your chosen tags.
 - Custom (Add) - This option will add the chosen tags to all of the selected records.
 - Custom (Remove) - This option will remove the chosen tags from all of the selected records if they are currently using that tag.
7. Click **Apply Changes** when finished. You may now add the tagged records as recipients to emails by adding the Smart List "Contacts by Tag" and selecting the appropriate tag.

Add Recipient Lists

To create custom email lists with your own criteria, go to the [Manage Smart Lists](#) page.

by tags

Contacts by Tags

☐ bbq organizers

☐ bulletin subscriber

☐ donor

☐ foundation committee

☐ friend

☐ meeting guest

☐ speaker

☐ sponsor

☐ volunteer

Members by Tags

Other Users by Tags

Past Members by Tags

Cancel

Add

To learn more about how to compose and send an email to recipients, please read the support article: [How do I compose and send an email?](#)