

ClubRunner

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[NOVA] How do I create a Field Set?

Michael C. - 2026-08-14 - [Reports](#)

A Field Set determines which pieces of member information are included when you export member data, and in what order they appear. Think of it as a template for your export file - instead of pulling every available field every time, you choose exactly the columns you want (like Name, Email, and Membership Type) and save that selection to reuse later.

Field Sets are used whenever you export member records. You can follow the steps below to create your own.

Note

Field Sets only define what's included in an export. They don't determine which members are included — that's controlled separately, either by the filters you apply on a Listing or by the settings of an Export Preset.

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. Click **Settings** in the left-hand navigation menu.
3. Under **Data Administration**, click **Field Sets**. This will bring you to a page listing any field sets you've already created.
4. Click **Create Field Set** in the top right-hand corner to start a new one.

List of Field Sets

Create Field Set

Search			
NAME ^	DESCRIPTION	RECORD TYPE	ACTIONS
+ Contact Info		Person	▼
+ Event additional fields		Person	▼
+ Event Commitments		Person	▼
+ Member Balances		Person	▼
+ Member Directory Details		Person	▼
+ Member Directory with Photos		Person	▼
+ Membership Info		Person	▼

1. Select the **Record Type** you'd like to create a Field Set for, then fill in the following:
 - Name – a short, recognizable label for the field set (this is what you'll see when selecting it later in an Export Preset).
 - Description – optional notes on what the field set is for or when to use it.

- Roles - which member roles are permitted to access or use this field set.

2. Click **Continue** to move on to selecting fields.

Add Field Set

1. Setup Field Set

2. Add Fields

3. Done

Field Set Details

Record Type *

Person

Name *

Description

Total characters including HTML: 0/200

Permissions ?

Select role(s)

Cancel

Continue

1. Add the fields you want included by selecting them from the available lists. For each field you add, you can select the following:

- Group - Allows you to specify whether you want information relating to the record itself, or related records. For example, here are the groups for the Person Record Type:
 - Person - The person who the record itself refers to.
 - Friend Of - A friend of the record.
 - Prospect Referred By - The individual who referred a prospective member.
 - Record Owner - The individual who created the record.
- Field - The specific field or piece of information you'd like to obtain from the record.
- Column Title - The name of the field column within the final exported report.

Fields

It is recommended to include unique identifier fields in your exported files, which are automatically added below based on the selected record type. These fields help maintain data integrity and facilitate efficient data management.

	Field	Column Title ?	Format		
⋮	Person ▾	A Entity Id ▾ EntityId	Entity Id	Value	🗑
⋮	Person ▾	A Entity Type Id ▾ EntityTypeId	Entity Type Id	Value	🗑
⋮	Person ▾	A Internal Friendly ID ▾ InternalFriendlyId	Internal Friendly ID	Value	🗑
	Person ▾	Add new field ▾			

Cancel Save

1. Once you've added all the fields you need, click **Save** to finish creating your field set.

Your Field Set is now ready to use. The next time you set up an Export Preset, you'll be able to select this Field Set to control exactly which columns appear in that recurring export — making it easy to build your own custom reports without re-configuring the columns each time. To learn more about Export Presets, please [click here](#).