

[NOVA] How do I create and use an Export Preset?

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

An Export Preset is a saved, reusable export configuration for a specific group of members. Rather than searching and filtering your member data from scratch every time you need the same export, you can set it up once — choosing which members to include and which fields to export — and save it as a preset to run again whenever you need it.

Export Presets are ideal for recurring reports, such as a monthly list of new members. Each preset pulls its member list from a Smart List and its columns from a Field Set, so you'll want to have both of these set up (or create them along the way) before saving your preset.

Note

An Export Preset only determines *what* is exported and *who* is included, based on the Smart List and Field Set you select. If you need a one-off export with different, flexible filters instead, you can export directly from a the Members or Contact listing, rather than creating a preset.

Creating 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 **Export Presets**. This will bring you to a page listing any export presets you've already created.
4. Click **Create Export Preset** in the top right-hand corner to start a new one.

List of Export Presets

View Bulk Actions

Search

Create Export Preset

NAME ^	DESCRIPTION v	RECORD TYPE v	SMART LIST v	FIELD SET v	ACTIONS
Attendance Data Export		Person	Members (All)	Event Commitments	
Event Commitments for Members		Person	Members (All)	Event Commitments	
Event Exports		Person	Members (All)	Event Commitments	

1. Select the Record Type, then enter a **Name** and **Description** for the preset so you can easily identify it later.

Create an Export Preset

Export Preset Details

Record Type *	Person
Name *	Member Contact Informa
Description	Export email, phone number and home address for active club members Total characters including HTML: 67/200

1. Select the **Smart List** you want this preset to pull its members from, and the **Field Set** you want it to use for the exported columns. Click the **Preview** links next to each to confirm they show the members and fields you expect before continuing.

Export Preset Settings

Smart List *	Members (All)	Preview
	Manage Smart Lists	
Smart List Permissions	Club Admins Club Presidents Club Executives Club Editors Club Members	
Field Set *	Contact Info	Preview
	Manage Field Sets	
Field Set Permissions	Club Admins Club Presidents Club Executives	

[Cancel](#) [Save](#)

1. Once you've confirmed your selections, click **Save** to finish creating your export preset.

Your Export Preset is now ready to use. You can return to it any time from the Export Presets page to run the export again, without needing to reselect your filters or fields.

How do I export an Export Preset?

Once you've created an Export Preset, running it is quick since your Smart List and Field Set are already saved.

1. From the **List of Export Presets** page, find the preset you want to use.
2. Click the **Actions** drop-down menu next to that preset, then select **Export**.

List of Export Presets

[View Bulk Actions](#)[+ Create Export Preset](#)

NAME ^	DESCRIPTION v	RECORD TYPE v	SMART LIST v	FIELD SET v	ACTIONS
Attendance Data Export		Person	Members (All)	Event Commitments	Edit Copy Export Delete
Event Commitments for Members		Person	Members (All)	Event Commitmer	
Event Exports		Person	Members (All)	Event Commitmer	

Showing all 3 records

1. After a few moments, your CSV report will be downloaded automatically. If it does not, click on the **Download CSV** once the export status has changed to Done.

Export Attendance Data Export

Description

Export Attendance Data Export

Done

76

Last Updated At2:07:58 p.m.

Close

Download CSV

Your file will be generated using the Smart List and Field Set saved in that preset, ready for you to download.