

ClubRunner

Changeover Webinar Series 2026 🎉

Advanced Topics in Nova
May 11, 2026



View our entire training schedule:
clubrunner.com/training

Welcome & Introductions



Zach Woods

Product Owner



Halle Asterbadi

Co-Founder



Say hello in the chat - tell us where you're attending from!



Post your questions in the Q&A section



Session is being recorded and will be posted on www.clubrunner.com/training

Agenda

- Advanced member/contacts/prospect management
- Smart Lists and queries
- New automation tools in Nova
- Form Builder
- Advanced reports and analytics
- An overview of the Nova Settings section
- What's coming next? Find out about our product roadmap
- 🚀 Live Demo



This webinar is being recorded and will be shared after the Changeover sessions conclude

Advanced Membership Management

Gemma Barnes

gemmabarnes@sink.sendgrid.net
(416) 555 - 7509

Rotary Number: 1020304
Member Type: Standard
Date Joined Club: Jan. 12, 2026 4 months ago
Last Login Club: May 05, 2026 6 days ago
Last Login Mobile: May 05, 2026 6 days ago

boardnominee sponsor volunteer

Activity Report

Send Email

Personal Communication Rotary Biography Commitments Privacy and Settings Financials Documents Notes

DETAILS

Title: Mrs.
First Name: Gemma
Middle Name: Ella
Last Name: Barnes
Nickname:
Suffix:
Gender: Female
Birthday: Aug. 22, 1985
Tags: boardnominee sponsor volunteer

Edit

CONTACT INFORMATION

Primary Email: gemmabarnes@sink.sendgrid.net
Alternate Email:
Preferred Phone: Mobile
Mobile Phone Country Code: Canada +1
Mobile Phone: (416) 555 - 7509
Preferred Address: Work

Edit

HOME

Home Phone Country Code: Canada +1
Home Phone: (877) 469-2582
Home Phone Extension: 2

Edit

SOCIAL MEDIA

Edit

Smart Lists

Smart Lists Beta

Display records[+ Add](#)

NAME ^	DESCRIPTION v
+ All Presidents within District	
+ All Presidents-Elect within District	
+ All Secretaries within District	
+ All Treasurers within District	
+ Contacts by Tags	
+ Current Officers	Club officers defined for the current
+ Custom Distribution List	Includes: Active Members and Other
+ Members (All)	List of all active and honorary mem
+ Members - All - New Members Last 365	List of all active and honorary mem
+ Members by Designations	List of all active and honorary mem
+ Members By Tags	List of all active and honorary mem
+ Members by Type	List of all active and honorary mem
+ My Club's Current Officers	Club officers defined for the current
+ My Club's Upcoming Officers	Club officers defined for the next Ro
+ My District's Current Club Officers	
+ My District's Current Presidents	

Edit Smart List Members - All - New Members Last 365

New Members in the last year

Person

[Preview](#)[Save](#)

Add Filter -

Membership Subscriptions

Persons with subscriptions that match criteria below.Subscription Status [Add Criteria](#)

AND

Field

TypeMemberActive

Person Type Member Active

AND

Smart List Settings

Properties [Export](#)

Smart List Details

Name *

Description

Match Criteria

Access

Permissions ?

Available in *

Automation Tools - Email Campaigns

- Campaigns
- Smart Lists
- Sender Profiles



Campaigns

Set up automated email campaigns for special occasions like member birthdays, anniversaries, and other important dates, sent annually on the celebrated date.

When you create a campaign, you can choose your recipient list, select an email template, set the send time, and customize the sender information. Click on Add Campaign to get started!

🔍 Search Add Campaign

NAME ^	DATE FIELD v	SMART LIST v	WHEN v	ACTIONS
Birthday Email	Birthday		8:00 AM	Active v
Club Anniversary	Anniversary		8:00 AM	Active v

Showing all 2 campaigns

Add Campaign

Name *

Smart List *

Date Field *

Email Details

Template *

From *

Schedule Email

Time ?

Activate Campaign?

Cancel Save

Advanced Reports & Analytics



- Fieldsets
 - Build your own downloadable reports
- Export Presets
 - Pre-built reports for easy access
- Bulk Actions & Logs
 - History of bulk actions

Edit Field Set [Event Commitments](#)

Field Set Details

Record Type* Person

Name*

Description

Total characters including HTML: 0/200

Permissions ? Club Admins x

Fields

	Field	Column Title ?	Format		
::	<input type="text" value="Person"/>	<input type="text" value="A First Name"/>	<input type="text" value="First Name"/>	<input type="text" value="Value"/>	<input type="text" value="🗑"/>
::	<input type="text" value="Person"/>	<input type="text" value="A Last Name"/>	<input type="text" value="Last Name"/>	<input type="text" value="Value"/>	<input type="text" value="🗑"/>
::	<input type="text" value="Person"/>	<input type="text" value="📧 Email Primary"/>	<input type="text" value="Email"/>	<input type="text" value="Value"/>	<input type="text" value="🗑"/>
::	<input type="text" value="Person"/>	<input type="text" value="Select Field"/>	<input type="text" value="Member Type"/>	<input type="text" value="Text Field"/>	<input type="text" value="🗑"/>
::	<input type="text" value="Person"/>	<input type="text" value="📍 Address"/>	<input type="text" value="Event Name"/>	<input type="text" value="Registration"/>	<input type="text" value="🗑"/>
	<input type="text" value="Person"/>				

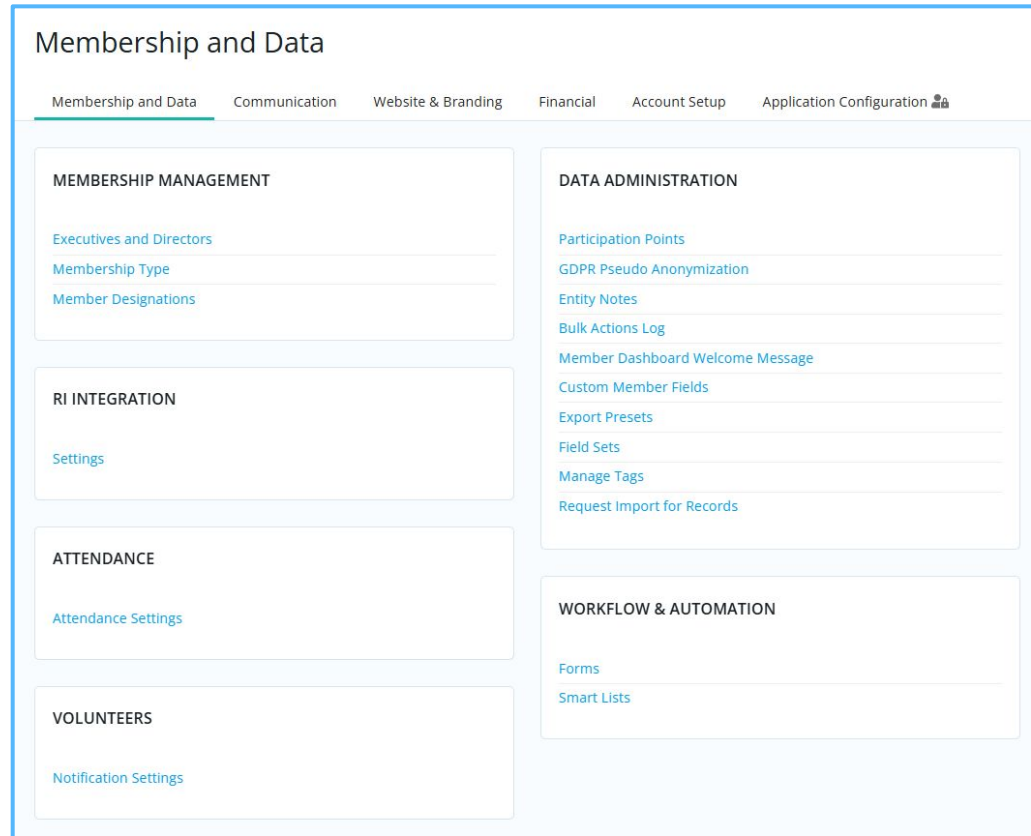
Person

- 📍 Address
- 📍 Address
- 📍 Address Address 1
- Address.Address1
- 📍 Address Address 2

Cancel

Nova Settings

- Launchpad to other pages
- Consolidated settings in one place
- Simpler navigation
- Roles-based access
- Reduced navigation menu
- Improved usability



The screenshot displays the 'Membership and Data' settings page. At the top, there is a navigation bar with tabs for 'Membership and Data', 'Communication', 'Website & Branding', 'Financial', 'Account Setup', and 'Application Configuration'. The 'Membership and Data' tab is selected and underlined. Below the navigation bar, the settings are organized into four main sections:

- MEMBERSHIP MANAGEMENT**
 - [Executives and Directors](#)
 - [Membership Type](#)
 - [Member Designations](#)
- RI INTEGRATION**
 - [Settings](#)
- ATTENDANCE**
 - [Attendance Settings](#)
- VOLUNTEERS**
 - [Notification Settings](#)

On the right side of the page, there are two additional sections:

- DATA ADMINISTRATION**
 - [Participation Points](#)
 - [GDPR Pseudo Anonymization](#)
 - [Entity Notes](#)
 - [Bulk Actions Log](#)
 - [Member Dashboard Welcome Message](#)
 - [Custom Member Fields](#)
 - [Export Presets](#)
 - [Field Sets](#)
 - [Manage Tags](#)
 - [Request Import for Records](#)
- WORKFLOW & AUTOMATION**
 - [Forms](#)
 - [Smart Lists](#)

vCard Exports



Clubs and Districts can now easily export vCards from membership details based on their privacy settings.

vCards allow importing of contact details into email programs.

Filters

Club: Blue Village

Name: First name, Nickname, Last name

Email:

Search More Options

Search

Name	Primary Email	Preferred Phone	Club	Classification	Designations	Actions
Judith 'Judy' Alexander		1-(904)966-2355	Rotary Club of Blue Village			Edit Download vCard
Christine Bell		1-(863)142-6222	Rotary Club of Blue Village			Edit Download vCard
Billy Brown	Billy.Brown@example.com	1-(407)980-7104	Rotary Club of Blue Village			Edit Download vCard
Kenneth Fisher	Kenneth.Fisher@example.com	1-(615)701-4558	Rotary Club of Blue Village			Edit Download vCard
Theresa George		1-(704)984-5448	Rotary Club of Blue Village			Edit Download vCard

← Go back

Card List

Club Directory

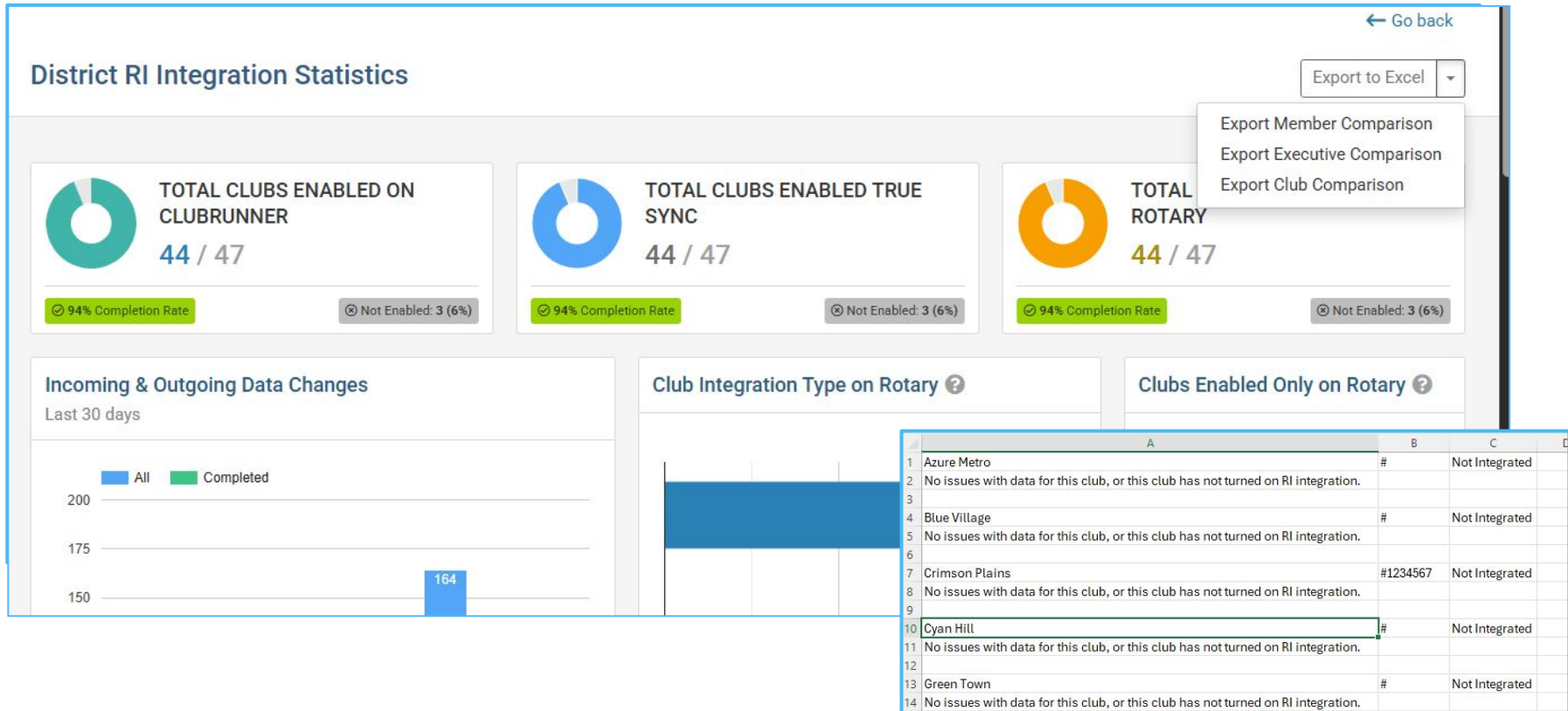
Search

Display 25 members

Download vCards Export to PDF Display All Member Types

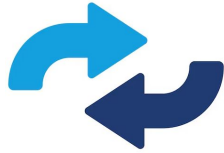
Member Name	Email	Preferred Phone	Cell Phone	Member Type	Actions
Adams, Shawn	sadams@sink.sendgrid.net	1-(808)763-5001 (Home)		Active	Download vCard
Ali, EA	ayesha@membemova.com	3864586539 (Home)		Active	Download vCard
Amishadhi, Dhanushi	dhanushi@membemova.com	(Home)		Active	Download vCard
Bartlet, Josiah	crzachery+bestpres@gmail.com	0310112222 (Home)	418104272	Active	Download vCard
Bennett, Norma	divya.tandan@doxess.com	393889 ext. 588 (Home)	(617) 555-1987	Active	Download vCard
Bowman, Angela	crzachery+ab2@gmail.com	12033366545 (Home)		Active	Download vCard
Bowman, Peter	crzachery@gmail.com	(318)741-1196 (Home)		Active	Download vCard

Rotary Integration District Insight Report



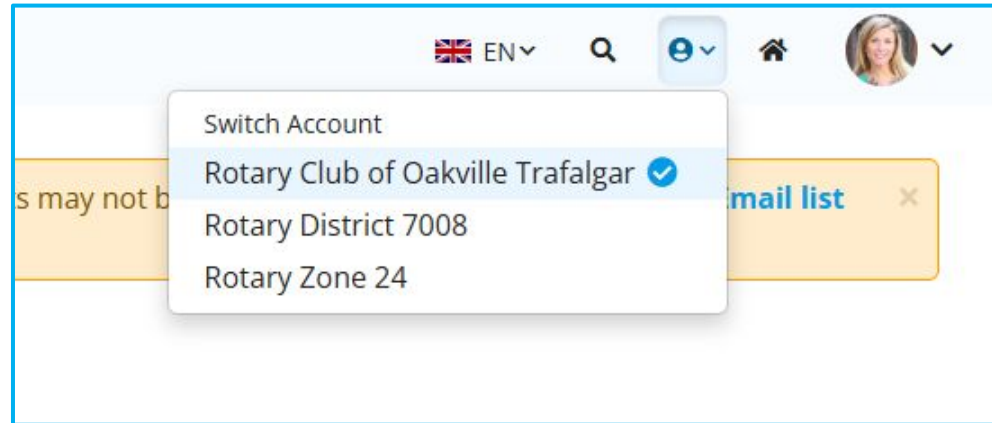
Roadmap

Account Switch



Toggle between Club, District and Zone without having to log out and log in again

- Additional buttons to be added to the top menu
 - Home
 - Support
- Language toggle for multilingual accounts



New Rotary Integration Tools

- New version of Rotary's API coming soon
- Improvements to the way data is updated
- Target date: July 1, 2027

Members in Sync

This report displays a comparison of your member list between ClubRunner and Rotary International. Click on Show to view a more detailed comparison of that member's contact details.

Search

Display records

SYNC ISSUES	NAME -	ID -	CR MEMBER TYPE -	RI MEMBER TYPE -	LAST UPDATED -	ACTIONS
!	Rinovamemberown, active	12459504	Active	Member	Dec 29, 2025	Compare
?	forlogin, activeMem	12459616	Active	Member	Jan 12, 2026	Compare
✓	authss, all	12461066	Active	Member	Jan 27, 2026	Compare
?	authmeth, all	12461063	Active	Member	Jan 27, 2026	Compare
✓	Sinha, Anand	9006623	Active	Member		Compare
!	Shuttleworth, Angus	8160854	Active	Member	Feb 10, 2017	Compare
?	wthnoemailss, anothermem	12459540	Active	Member	Dec 30, 2025	Compare
?	withaddress, Anothermemm	12459400	Active	Member	Dec 10, 2025	Compare

RI Club Info Compare and Synchronize for Kipling South (4636)

Club Name: Kipling South

Rotary Club Id: 4636

The following chart displays this club's information as it currently appears on both ClubRunner and RI. For any discrepancies, you can copy over either the ClubRunner value or the RI value by checking the box for the corresponding field, then clicking on the arrow to reflect the direction of the copy. Once you have selected all your values, click on the Synchronize button below.

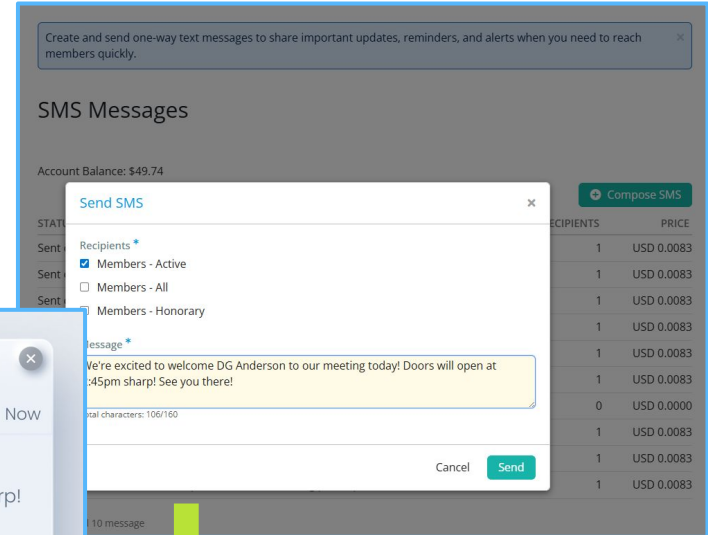
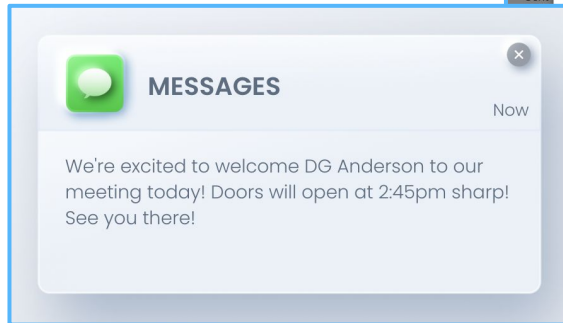
<input checked="" type="checkbox"/>	Field	ClubRunner	← →	Rotary International
<input type="checkbox"/>	Meeting Address			
<input type="checkbox"/>	Address Line 1	400 Munster Ave	==	400 Munster Ave
<input type="checkbox"/>	Address Line 2		==	
<input type="checkbox"/>	City	Etobicoke	==	Etobicoke
<input type="checkbox"/>	State/Province	ON	==	ON
<input type="checkbox"/>	Zip	M8Z 3C7	==	M8Z 3C7
<input type="checkbox"/>	Country	Canada	==	Canada
<input type="checkbox"/>	Meeting Day	Mon	==	Mon
<input type="checkbox"/>	Meeting Time	18:30	==	18:30
<input type="checkbox"/>	Meeting Place	Kipling South	==	Kipling South
<input type="checkbox"/>	Meeting Comments	We meet on the second and fourth Monday of every month at 7:00pm to 8:00pm EST . Meetings on second Monday are on Zoom while on fourth	==	We meet on the second and fourth Monday of every month at 7:00pm to 8:00pm EST . Meetings on second Monday are on Zoom while on fourth

SMS Broadcasts*



- Reach members where they are
- Send SMS notifications directly from Nova
- Perfect for event reminders, urgent club updates & time-sensitive alerts
- Higher open rates than email (members see messages instantly)
- Integrates with existing member data and Smart Lists for targeted messaging
- Opt-in/opt-out compliance

** Available as an add-on. Requires purchase of message credits and small monthly fee.*



Wallets and Prepayments



PREPAYMENTS

How it works:

Members **pay in advance** for dues, events, and club purchases

A wallet is like a stored balance members can use across multiple transactions

Benefits:

- Fewer payment steps
- Improved cash flow
- Simplified admin tracking

Invoice #1000417

Bill To: Jenna Fortin
Status: Not Paid

ITEM DESCRIPTION	QUANTITY	AMOUNT
Donation for Coats for Kids		\$75.00
Amount Due		\$75.00

Payment

Wallet Payment

Use \$75.00 from your \$150.00 wallet balance

Payment Summary

Payment Amount	\$75.00
Wallet Payment	-\$75.00
Final Payment	\$0.00

[Submit Payment](#)

Add Funds to Wallet

Wallet Balance: **150.00** USD

Add Amount:

Payment Details

Name on Card:

Credit Card Number: **VISA**

Expiration Date:

[Edit](#)



Bulk Invoice Payments

Email Invoice(s) Export to PDF Apply Payments Export To Excel

25 of 62 total records selected. All 25 records on

Bulk pay invoices.

DATE	INVOICE ID	ORF NO	BILL TO	CLUB	TOTAL (CAD)	SOURCE	POSTED	DATE POSTED	DUE DATE	STATUS	ACTIONS
Apr. 17, 2026	1000110	112	Marina Tulloch	Rotary Club of Kipling	125.00	Events	No		May 17, 2026	Not Paid	
Apr. 17, 2026	1000099	101	Brett Errett	Rotary Club of Christie	125.00	Events	No		May 17, 2026	Not Paid	
Apr. 17, 2026	1000098	100	Aldric Pointin	Rotary Club of Sheppard	125.00	Events	No		May 17, 2026	Not Paid	
Apr. 17, 2026	1000097	99	Annamaria Birdwhistell	Rotary Club of Christie	125.00	Events	No		May 17, 2026	Not Paid	
Apr. 17, 2026	1000096	98	Ronny Graal	Rotary Club of York	125.00	Events	No		May 17, 2026	Not Paid	
Apr. 17, 2026	1000095	97	Aarika Demangel	Rotary Club of Bathurst	17.00	Events	No		May 17, 2026	Not Paid	
Apr. 17, 2026	1000094	96	Benton Burrass	Rotary Club of York	10.00	Events	No		May 17, 2026	Not Paid	

Provide the per invoice details and complete the payments!

← Back to Page English Search ...

Apply Bulk Payments to Invoices

Select GL Account

GL Account Bank (Default Payment)
The selected GL account will be used for all the transactions.

Manage Invoice Payments

Bulk Actions
Click "Apply to All" to set the value for every invoice. You can still change invoices individually.

Transaction Type * ACH Direct I Apply to All

Payment Date * 2026-05-05 Apply to All

Amount to Pay
Apply to All

Invoice Balance Copy Balances to Amounts

Search Display 25 records

INVOICE ID	BILL TO	PAYMENT DATE	TRANSACTION TYPE	TRANSACTION ID	NOTES
1000417	Jenna Fortin	2026-05-05	ACH Direct Deposit	Transaction ID	
1000416	Dhanushi Amishadhi	2026-05-05	ACH Direct Deposit	Transaction ID	
1000415	Sam Hans	2026-05-05	ACH Direct Deposit	Transaction ID	
1000404	Bethany Beig	2026-05-05	ACH Direct Deposit	Transaction ID	
1000403	Wayne Zarsky	2026-05-05	ACH Direct Deposit	Transaction ID	

District Billing to Clubs

Districts can now invoice: members, contacts & **clubs**

Works just like billing members

Create invoices based on:

- Flat fee and fixed quantity
- Calculated rates based on the number of members in the club
- Email to Club Treasurer

Select Recipients

Smart List*

Batch Item Details

Item Type*

Membership Type*

Description*

Price Calculations

Default Price (CAD)

Default Quantity Fixed quantity of 1

Select this to charge a fixed amount.

Calculate quantity based on

Automatically calculates the order quantity based on your selected Smart List.

Recipients

All 21 of 21 total records selected.

<input checked="" type="checkbox"/>	NAME	CALCULATED QUANTITY	PRICE (CAD)	TOTAL (CAD)
<input checked="" type="checkbox"/>	Rotary Club of Royal York	<input type="text" value="21"/>	<input type="text" value="10"/>	210.00
<input checked="" type="checkbox"/>	Rotary Club of St Clair	<input type="text" value="18"/>	<input type="text" value="10"/>	180.00

Invoice Reminders



Set up renewal reminders as many days before and after the due date as you like

- Customize the email template
- Send to different people
- Add a personalized message



The screenshot displays the "INVOICE REMINDERS" configuration interface. It features a vertical timeline on the left with markers for "10 Days Before", "2 Days Before", "1 Day Before", "Due Date", and "2 Days After". A blue "Add Email" button is positioned at the top right. The interface lists five reminder configurations, each with an "Active" status and a dropdown menu:

- 10 Days Before Due Date:** Send email from **Account Full Name** at 11:00 AM.
- 5 Days Before Due Date:** Send email from **From the Club** at 3:30 PM.
- Invoice due Tomorrow:** Send email from **Account Full Name** at 1:30 PM.
- Invoice Due Date:** Due Date.
- Invoice Overdue:** Send email from **Account Full Name** at 10:00 AM.

A green arrow points from the "Send" button in the email template screenshot to the "Add Email" button in the reminders configuration interface.

Smart Groups

- Automatically add members to groups based on Smartlists
- Automation to add and remove members based on eligibility
- Perfect for dynamic and evolving member groups
- Adapts as member data changes
- Reduces manual group management
- Helps stay compliant with who should access what resources



Smart Groups







Executives Delete

Home Events **Members** Documents Emails Settings

Add Multiple Members

Next refresh: Apr. 20, 2026 at 9:49 p.m.
This list updates after the next Smart List refresh. Updates may not show right away.

NAME

-  **Adam Adams**
Not in the group yet
Pending addition on next refresh
-  **Adam Anderson**
Not in the group yet
Pending addition on next refresh
-  **Adam Brooks**
Not in the group yet
Pending addition on next refresh
-  **Aditi Agarwal**
Not in the group yet
Pending addition on next refresh
-  **Aditya Agarwal**
Not in the group yet
Pending addition on next refresh
-  **Aditya Agarwal**

BASIC INFORMATION Edit

Name
Executives

Short Description

Group Category


Group Membership Management
Automatic membership
Members are added automatically based on Smart List criteria.

Group Membership Criteria

RECORD TYPE SMART LISTS

Person Smart Search - Officers Filter

Executives

 12124 members
You are a member

View

QR Codes

QR Code Generator

Generate QR codes for any web address. You can customize the image size and optionally add your organization's logo to the center of the QR code. The generated image is saved and a shareable link is provided.

QR Code Settings

Web Address

Enter the web address you want to encode as a QR code.

Logo Image URL

Optional. Provide a link to a logo image to display in the center of your QR code.

Image Size (pixels)

Choose a size between 50 and 1000 pixels. Default is 150.

[Generate QR Code](#)

Generated QR Code



Image URL

Copy this link to use your QR code image.



Generate a QR code for any page on your website!

Copy and paste in your marketing efforts

Future of Cloud Events



RSVP

RSVP (Event Planner functionality)

Attend/Decline/Maybe

Managing registrations

- Assigning products to attendees
- Editing registrations by buyers
- Cancelling tickets/products by admins

And more...

- Easily convert attendees to contacts
- Improved Registration Flow
- Zoom integration (Released)
- QR code check-in (Released)

Web Accessibility - Ongoing Commitment

Everyone should be able to use ClubRunner with their preferred assistive tech

- Ground work done, system can be more easily navigated by assistive tech
- Easier to jump to straight to content on a page by skipping navigation menu
- Navigation menu reworked including expanded/collapsed states and guide you in logical order
- Next steps are improving high traffic screens, and then moving out from there.
- Examples: Email Designer, List of Members, Member Profile
- Mobile app also receiving similar updates - target is version 4.5 (next update)



Demo

Support Resources



Contact Support

support@clubrunner.ca | 1-855-621-2582 | +1-647-490-5878



View Knowledgebase

www.clubrunnersupport.com



Join the ClubRunner Community

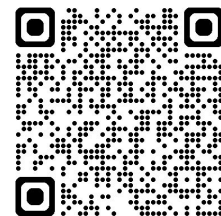
www.clubrunnercommunity.com



Download our Mobile App

www.clubrunner.ca/mobile

Check out all
the other
sessions!



View our entire training schedule:
clubrunner.com/training