

MEMBERSHIP

Membership Management

1. Go to the Membership module.
2. Click Memberships.
3. Filter by desired member status, board member status, or name.
4. Click the green “Export Emails” button at the top of the screen to export the filtered list.

Membership Reports

1. Go to the Membership module.
2. Click Reports.
3. The Members tab will let you filter by member type, status, payment type, dates or name.
4. The Engagement tab will let you filter by the member’s engagement with the group.
5. The Registrations tab will let you see who attended the events.
6. Click the green “Export to CSV” button when you have your desired report.

Editing a Member’s Information

1. Go to the Membership module.
2. Click “Memberships”.
3. Search for members by name in the search field.
4. Click Edit.
5. Edit the fields as desired.
6. Save.
7. Click Close to exit the Membership section.

Add a Member

1. Go to the Membership module.
2. Click “Memberships”.
3. Click the Blue “Add New Member” button in the top right corner
4. Fill out the information.
5. Click Pay by Invoice if you do not have credit card information.
6. Click Sign Up.