

How To FIND & UPDATE A MEMBER



Find the member,
make your
changes, and
save the update.
It's that simple!



You can search for members by name, email, phone, status, or date range.
Once you find the member, you can view details and update any information.

SEARCH / FILTER

1 Search name, email, phone... All Statuses From To Search Reset



Total Members

20

15 Active • 5 Inactive

Search Results

3

(Showing search results)

MEMBERS (Search Results)

3 results

John Doe

john.doe@email.com • (262) 123-4567

Status: Active

View / Manage

Jane Smith

jane.smith@email.com • (262) 987-6543

Status: Active

View / Manage

Robert Johnson

robert.rj@email.com • (262) 555-1212

Status: Inactive

View / Manage

VIEW / MANAGE MEMBER

Name * John Doe

Email * john.doe@email.com

Phone (262) 123-4567

Status * Active

Initial Membership Date * 01 / 15 / 2025

Renewal Date * 01 / 15 / 2026

Notes Mailing address updated 6/10/2025.

Save Changes

Cancel

You can update:

- ✓ Name
- ✓ Email
- ✓ Phone
- ✓ Status
- ✓ Initial Membership Date
- ✓ Renewal Date
- ✓ Notes

When finished,
click "Save Changes".

1 SEARCH / FILTER

Enter a name, email, or phone number
in the search box.

Use the Status dropdown or Date Range
(From / To) if needed.

Click "Search".

2 SEARCH RESULTS

The number of results will appear here.
Matching members are listed below.

3 MEMBERS LIST

Click "View / Manage" next to the
member you want to update.

The member's details will open below.

4 VIEW / MANAGE MEMBER

Review the current information.

Make any updates needed in the fields.

All required fields are marked with *.

When finished, click "Save Changes"
to update the record.



QUICK TIP

You can search again at any
time to find another member
or click "Reset" to clear
your search filters.

USEFUL REMINDERS

- ✓ Use partial names to find members quickly.
Example: searching "john" will find "John Doe".
- ✓ Keep membership dates up to date to ensure accurate records.
- ✓ Use Notes to record important information
(address changes, payments, special circumstances, etc.).

WHAT HAPPENS NEXT?

- 1 Your changes are saved immediately.
- 2 The updated information will appear in the Members list.
- 3 You can view, edit, deactivate, or delete the member
anytime from "View / Manage".
- 4 You can export the list anytime using "Export CSV".



A FRIENDLY REMINDER

Always review the information carefully before saving changes.
Accurate records help us stay connected and support our members.

*Thank you for
serving our club!*