

# HOW TO USE MEMBERSHIP MANAGER

WCAC Membership Manager - overview of the main membership tools

Membership Manager is the main work area for adding, updating, archiving, and reporting on WCAC members. Use the task cards below and follow the separate How To guides when you need step-by-step detail.

## MEMBERSHIP MANAGER

Main Work Area

### REPORTS

Search, filter, print, export CSV, and open reports in Excel.

**OPEN REPORTS**

### ADD / EDIT / ARCHIVE MEMBER

This card opens closed when Membership Manager first loads.

- ☒ **Add a New Member**  
Create a new membership record.
- ☐ **Edit an Existing Member**  
Update the selected member's record.
- ☐ **Archive an Existing Member**  
Preserve the record but remove it from normal use.

### KEY RECORD RULES

Status is automatic from End Date. Common Name stays read-only.

Changing Renewal Start Date or Membership Term recalculates End Date. Ordinary edits do not.

### MEMBERSHIP HOW TO GUIDES

- Use Membership Manager
- Add a Member
- Find / Update Member
- Export Membership
- Membership Rules of Operation

## HOW TO WORK IN MEMBERSHIP

- 1 OPEN MEMBERSHIP MANAGER**  
Use the protected Membership Manager page. Membership records are private and are not public website content.
- 2 START WITH REPORTS WHEN LOOKING**  
Use Reports to search, filter, review, print, export CSV, or open data in Excel.
- 3 ADD A MEMBER**  
Choose Add a New Member when creating a record. Exact duplicate First + Last names are blocked.
- 4 EDIT A MEMBER**  
Choose Edit an Existing Member, select the person, and change only what is needed.
- 5 ARCHIVE A MEMBER**  
Use Archive when the record should be preserved but removed from normal Membership use.
- 6 DO NOT DELETE MEMBERS**  
Routine Membership users archive records. Restoring an archived member is an Admin-only function.
- 7 WATCH THE DATE RULES**  
Changing Renewal Start Date or Membership Term recalculates End Date. Other edits preserve it.
- 8 WATCH STATUS**  
Active / Inactive is calculated automatically from End Date. Missing dates show Renewal Data Needed.
- 9 USE NO CONTACT CAREFULLY**  
No Contact means no Membership email or phone contact. It does not change Status.
- 10 USE THE HOW TO GUIDES**  
Open the task-specific guide whenever you need detailed steps or are unsure what a field means.

### GOOD WORK HABITS

- Review the member before saving changes.
- Use Reports instead of trying to browse all members manually.
- Do not guess at missing renewal dates or historical information.
- Use Notes for helpful internal information, not as a substitute for fields.

### REMEMBER

- Membership email is handled through [membership@walworthalano.org](mailto:membership@walworthalano.org).
- Archived members are excluded from normal lists, reports, searches, and reminders.
- Common Name is preserved; normal edits do not rewrite it.
- When uncertain, stop and check before overwriting member history.