

Member Statuses

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Quick Steps: Members > Members Listing

1. Within the Management Console, select **Members** from the top menu, then **Members Listing** from the left menu.
2. Complete a search for the member that you need to update the status of, or if you need to approve a number of members leave the search field blank and then filter on Online status.
3. The Member will be sitting in one of four different statuses (please see below), click on the icon under the **Status** column to change the member status from one to the next.

Once a member is **Active**, they can only be changed between **Active** and **Inactive**, you can't switch a member back to Pending or Online.

1. Active

Active members are those members or records that your organisation deems to still be actively involved in your organisation.

These might be paid members or participants or even active prospects.

New records added into your database via a Member Data Import or added as a new record through your Management Console are automatically assigned an Active Status.

Records with an Active Status can be identified by the "green tick" in the Status column of your members listing.

2. Inactive

Inactive members are those members or records that your organisation deems to still be no longer involved in your organisation.

These might be former members that haven't renewed in a number of years, deceased members, or people who have informed your organisation they no longer wish to be involved.

Records can only be made Inactive by updating the status of Active to Inactive, this is done by clicking on the "green tick".

Records with an Inactive Status can be identified by the "red cross" in the Status column of your members listing.

3. Online

Online members are those members or records that have recently joined your database via an online registration, from any one of the modules your organisation uses (EG. Members, Shop, Auctions, Events, TicketDesq).

This status is assigned automatically and is a flag to your organisation that you have had new members or records added to your database.

Many organisations use this status as a workflow to check and approve data. Before making an Online record Active, they will check to ensure all details have been properly provided and update data accordingly.

Records with an Online Status can be identified by the "light green world icon" in the Status column of your members listing.

You can update all Online members at the same time using the Activate All functionality.

To do this click leave the search field blank and click **Search**. Filter on **Online** status and a new button will appear at the top of the page titled **Activate All**. Click **Activate All** to turn all Online members to Active.

Once a member is Active, they can only be changed between Active and Inactive, you can't switch a member back to Online.

4. Pending

Pending members or records are, in most cases, those that your organisation is yet to approve or you are awaiting payment from.

Pending isn't a status that is widely used and its use is configured in the original setup and rollout of your database.

Records with a Pending Status can be identified by the "alarm clock icon" in the Status column of your members listing.

We recommend to all organisations to never delete a member or record. Our recommendation is to use the Inactive Status to flag records that are no longer actively involved with your organisation, or in the case of duplicate records, to perform a merge.

Additional Information: Each member or record in your database will have a defined Member Status. The way you use each status is to be interpreted by your organisations requirements, there are four statuses in total. These are: Active, Inactive, Online and Pending. A member's status can be identified by the icon display in the Status column of the members listing.

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