

Member Status

Last Modified on 16/02/2017 12:13 pm AEDT

Quick Steps: Membership > Members > Search Member > Status > Action > Update Member Status

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 OST system are automatically assigned an Active Status.

Records with an Active Status can be changed to an Inactive status via the **Actions** button next to the Member Record.

INACTIVE

Inactive members are those members or records that your organisation deems to no longer be 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 with an Inactive Status can be changed to an Active status via the **Actions** button next to the Member Record.

ONLINE

Online members are those members or records that have recently joined your database via an OST online registration form.

This status is assigned automatically and is a flag to your organisation that you have had new members or existing members renew online 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 changed to an Active or Inactive status via the **Actions** button next to the Member Record.

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 changed to an Active or Inactive status via the **Actions** button next to the Member Record.

To filter on Member Status go to Membership > Members and click the Filter button to the left of the Enter Search Term box, in the Pop Up select the Status you wish to filter on and click Apply.

Please Note: Members will appear as financial as long as there is one active subscription that grants financial status recorded against their account

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