Membership Basics - Contact Records, Reports and Groups

The following topics are covered in this section. Click on a topic to go to that section.

Introduction to Membership Management Basics Membership Contact Records Membership Dashboard Find Memberships Membership Advanced Search Membership Reports Membership Relationship Reports Membership Groups Membership Smart Groups

INTRODUCTION TO MEMBERSHIP MANAGEMENT BASICS

Much of the functionality of the website relies on keeping memberships up to date. Once members are current, it is then possible to enjoy the efficiency of the website email, event registration, mailing labels, reporting and exporting.

It is important for the VP Membership, Web Administrator, and Treasurer/Assistant Treasurer to understand the various tools available to manage current members, manage new members and renew all membership types. These include renewals with dues payments (i.e. Associate and Active) and renewals without dues payments (i.e. Chapter Board, National Board, and Honorary members). Existing Life members do not require a renewal but they do need to be contacted to login and update their **Member Profile** and **Volunteer Interests and Skills** information.

All memberships (with the exception of lifetime memberships) are renewed on a yearly basis. To make this job easier, the profile **Custom Membership Details - Bulk Entry** allows updating end dates for multiple memberships at one time. On July 1 each year, memberships that have not been renewed for the new fiscal year are automatically assigned a membership **Status** of **Grace**. This is in effect for three months until September 30. If the membership is not renewed within the three-month grace period, it will automatically change to **Expired**. **Memberships with Expired Status will not be listed in the Chapter and National Membership Reports as well as the Memberships Dashboard. It is very important to keep memberships current for organizational reports, mailings and statistics.**

Each member must have a **Contact Record** and **User Account**. The **Contact Record** contains all known data on that member. The **User Account** allows the member to login to the website. Each User Account has a role(s) assigned (i.e. General Member, Board Member, Site Admin). These roles determine what the member can do on the website. It is critical that member **Contact Records** and **User Accounts** be kept current.

When entering membership data, it will streamline data entry to have the following information available for the upcoming fiscal year.

- New Chapter Members
- Resigning Chapter Members
- Deceased Chapter Members
- Returning Chapter Board and Honorary Members
- Resigning Chapter Board and Honorary Members
- New Chapter Board Members
- Chapter Board Member Positions
- > Chapter Members on the National Board and National Committees

Membership Contact Records

How to Search for Contact Record

When data needs to be entered on a contact record, the first thing to do is search for the contact record. Current members should already have a contact record. New members, who have participated in Chapter events, should also have a contact record. To avoid creating duplicate contact records, always search before creating a contact record. Here are five ways to search for a contact record:

- Once familiar with it, this will be the easiest way to search quickly for a contact record. Log
 in > CiviCRM > Locate the search box labeled "Quick Search" in the upper left hand corner
 of the screen > Enter the Last Name of the individual and choices appear to select from.
- 2. Login > CiviCRM > Locate the Full-Text Search box in the middle of the left sidebar > Enter the Last Name of the individual > Go and choices appear to select from.
- 3. Login > CiviCRM > Search > Find Contacts and enter the name or email of the individual.
- 4. Log in > CiviCRM > Memberships > Find Memberships > Membership Type(s) and Membership Status(es)
- 5. Log in > CiviCRM > Search > Advanced Search > Memberships > Membership Type(s) and Membership Status(es)

If an individual does not have a contact record, then a contact record needs to be created.

Create Contact Record

If after searching, a contact record cannot be found, it will be necessary to create a contact record. The easiest way to create a contact record is:

Step 1: LoginStep 2: Select CiviCRMStep 3: Locate New Individual on the left side of the screen.

Step 4: Enter the new contact's First Name, Last Name, Email
Step 5: Select Save.
Step 6: Enter any information that is known about the individual. Further information about the individual can be added later, as it becomes available.
Step 7: Select Save.

Manage Contact Records

The **Contact Record** is the "default" location to enter data on any individual. Even if bulk entry and other methods that streamline data entry are not utilized, all pertinent data can be entered on a member's **Contact Record**. The **Contact Record** page has tabs at the top that allow a variety of functions to be carried out. It is important to become familiar with a member's **Contributions tab**, **Memberships tab**, **Relationships tab**, **Events tab** and **Groups tab**. See screenshot below showing the tabs at the top of a Contact Record. If not using methods that streamline data entry, when on a contact record, fill out as much information that is available to avoid having to go back multiple times.

Home » CiviCRM » CiviCRM	
A Mar Diana Minha	8
A Mrs. Diane Might	
Actions 👻 🖍 Edit 🗰 Delete Contact	
Summary Contributions 45 Pledges 0 Memberships 3 Events 30 Activities 3245 Awards 0 Relationships 3 Groups 5 Notes 2 Tags 1 Change Log 838	

1. <u>GROUPS TAB</u>: It is very important to keep groups updated for emails, postal mailings, reports and exports. One method is to search and find the Contact Record that needs to be updated. Select the Groups tab at the top and follow the prompts. For the sake of demonstration, Phoenix is used in this example. Suppose a new member needs to be added to the the phx_General Member group that includes all Chapter membership types i.e. Active, Associate, New Life, Existing Life, and Honorary. To add this group, search and find the new member's Contact Record. Select the Groups tab > + Add to a group > phx_General Member > Add. Be sure to remove any groups that are no longer applicable such as phx_Friend of ARCS and/or phx_Prospective Member.

IMPORTANT NOTES: 1. Chapter prefixes followed by an underscore must be in <u>all</u> group titles i.e. phx_Current Chapter Board. 2. REMOVE but NEVER DELETE a member from a group!!

See arrows on screenshot below on where to add, remove, and/or rejoin a group on a member's contact record. Note that there is also a **Smart Groups** tab. Select the **Smart Groups** tab to see, if the individual is a member of a **Smart Group**.

Actions 🖌 🖍 Edit 👼 Delete	Contact								
Summary Contributions 45 Pledges 0	Memberships 3 Eve	nts 30 Activities 3245	Awards 0	Relationships 3	Groups 5	Notes 2	Tags 1	Change	Log 838
Add to a group									
Regular Groups									
Mrs. Diane Might has joined or been added to	these group(s).								
Group		us	Date	Added			-		
phx_2017-2018 Chapter Board	Add	ed (by Admin)	May	6th, 2017 2:55 F	M		F	Remove	Delete
phx_General Member	Add	ed (by API)	Aug	ust 30th, 2011 4:	41 AM		F	Remove	Delete
phx_Internal Content Editor	Add	ed (by Admin)	Apri	2nd, 2016 6:29	AM		F	Remove	Delete
phx_Internal Database Admin	Add	ed (by Admin)	Apri	2nd, 2016 6:30	AM		F	Remove	Delete
phx_Webmaster	Add	ed (by API)	June	e 4th, 2013 2:12 I	РМ		F	Remove	Delete
► Smart Groups									
Past Groups									
Mrs. Diane Might is no longer part of these gr	oup(s).								

Another method to manage **Groups** is to select **CiviCRM > Contacts > Manage Groups**. **Scroll to the desired group > Contacts**. See the section <u>Membership Groups</u> below for more information on adding or removing members from groups without having to go into each member's **Contact Record**. If you are managing or creating groups for the first time and need assistance, contact <u>is.help@arcsfoundation.org</u>.

Membership **Groups** can vary widely based on Chapter convention. However, at a minimum, the following are recommended to be kept current by the VP Membership or the Website Administrator for mailing purposes.

- Chapter prefix_General Member (All Chapter Membership types i.e. Active, Associate, Existing Life, and Honorary)
- Chapter prefix_Current Chapter Board
- > Chapter prefix_Members Without Email (All members needing snail mail)
- > Chapter prefix_Prospective Member (All prospective members)
- <u>RELATIONSHIPS TAB</u>: Select the Relationships tab > Add Relationship to add any known relationships for the any contact, including members. For example: Spouse / Significant Other, Employer, Chapter Board positions, and Chapter members who hold National Board positions or sit on National Board Committees.

& Anna Maria Matteucci	
Actions > /* Edit	
Summary Contributions 67 Pledees 0 Memberships 3 Even	s 52 Activities 750 Awards 0 Relationships 3 Groups 5 Notes 0 Tags 1 Change Log 246
Add Relationship Current Relationships	

The screenshot below shows how to enter the relationship data for a Chapter Board member position. The same is true for Chapter members who are on the National Board and/or National Board Committees except that the contact is **Achievement Rewards for College Scientists Foundation, Inc, National**. There are dropdowns so you can select the **Relationship Type** and **Contact(s)**. Note that Board Relationships are based on the fiscal year. Be sure to **SAVE** the Relationship!!!

Add Relationship for A	nna Maria Matteucci	8	ø	×
Relationship Type *	Chair/VP/Director of Membership of			
Contact(s) *	X ARCS Foundation - Phoenix Chapter			
Start Date	7/1/2017 End Date 6/30/2018 *			
	If this relationship has start and/or end dates, specify them here.			
Description				
Notes				
Permissions	Anna Maria Matteucci can view and update information about selected contact(s).			
	Selected contact(s) can view and update information about Anna Maria Matteucci.			
Enabled?				
				-
	Save Relationship ×	Can	el	

After saving the relationship, here is what the **Relationships** tab will look like:

me » CiviCRM » CiviCRN	1											
Anna Maria M	atteucci											
Actions 🤟 🖍 Edit	🗊 Delete	Contact								< Previ	ous	→ N
Summary Contribution	ns 67 Pledges 0	Memberships 3	Events 52	Activities 749	Awards 0	Relationships 3	Groups 5 N	lotes 0	Tags 1	Change Log 2	46	
• Add Relationship												
Current Relations	hips											
Show 10 💠 entries									Firs	st Previous	1 Ne	ext La
Relationship	*	Since 🔶	Position 🝦	City	State/P	rov Email		4	Pho	one 🍦		
Chair/VP/Director of Membership of	ARCS Foundation - Phoenix Chapter	July 1st, 2017		Phoenix	AZ	phoenix	@arcsfounda	tion.org		View	Edit	more
Chair/VP/Director of Awards Event Committee of	ARCS Foundation - Phoenix Chapter	July 1st, 2016		Phoenix	AZ	phoenix	@arcsfounda	tion.org		View	Edit	more
VP-Finance (ARCS National) of	Achievement Rewards for College Scientists Foundation, Inc, National	July 1st, 2016		Washington	DC	national	@arcsfounda	tion.org	404- 2344	277- View	Edit	more

If a member is serving consecutive terms in a position, select **Edit** and update the relationship end date. **Be sure to add the number of consecutive terms under the Description i.e. 2 years. Select SAVE RELATIONSHIP**!!

Edit Relationship for M	rs. Patti Tucker	8	ø	×
Relationship Type *	Treasurer of			
Contact	ARCS Foundation - Phoenix Chapter			
Start Date	07/01/2016 End Date 06/30/2018 ×			
	If this relation has start and/or end dates, specify them here.			
Description	2 Years			
Notes				
Parmissions	Mrs. Patti Tucker can view and update information about ABCS Foundation - Phoenix Chapter.			
1 611113510115	ARCS Foundation - Phoenix Chapter can view and update information about Mrs. Patti Tucker.			
Enabled?				
	✓ Save Relationship ×	Can	əl]

The screenshot below is what the current relationships look like for the above member whose relationship was edited to reflect serving 2 consecutive terms in the Chapter Treasurer position. Note that there are also two other current relationships: the current scholar this member sponsors as well as her spouse/significant other. All past **Inactive Relationships** are listed below the **Current Relationships**.

Y.					Y Y	-						
ummary Contribu	tions 32 Pledges 0	Memberships 2	Events 23	Activities 568	Awards 0	Relationships 3	Groups 4	Notes 2	Tags 0	Change Lo	g 39	
Add Relationshi	ip											
Current Relation	nships											
how 10 💠 entrie	es								Firs	st Previou	s 1 N	lext Last
Relationship	Å	Since 🍦	Position	City 🌲	State/Prov	♦ Email			Pho	one 🔶		
Spouse / Significant Other of	🔒 Tucker, Mark			Phoenix	AZ				602- 9364	241- Vi	ew Edit	t more+
Treasurer of 2 Years	ARCS Foundation - Phoenix Chapter	July 1st, 2016		Phoenix	AZ	phoenix@a	arcsfoundati	on.org		Vi	ew Edit	t more ►
Sponsors	🔒 Hwang, Hwee	July 1st, 2017		Tucson	AZ	hweehwan	g@email.ar	izona.edu	702-	496- Vi	ew Edi	t more •

2. <u>HOW TO EDIT CONTACT INFORMATION</u>: Much of the contact information on the **Contact Record** can be edited by hovering over fields and saving the data entry. However, not all fields are available

to do this. For access to <u>all</u> fields select **Edit** at the top of the **Contact Record** to add, update, or remove contact information.

Home » CiviCRM » CiviCRM	
B Mrs. Sharon Ponce Actions → ✓ Edit © Delete Contact	-
Summary Contributions 3 Pledges 0 Memberships 1 Events 3 Activities 13 Awards 0 Relationships 2 Groups 1 Notes 0 Tags 0 Change Log 8	

After selecting Edit, there are several other tabs below that need to be filled in or updated with known member information: Member Only Information, General Information, Address, Communication Preferences, Demographics, and Tags and Groups. The National Board Information tab and Scholar Eligibility (Admin Use Only) are not applicable for members. ALWAYS BE SURE TO SELECT SAVE BEFORE LEAVING THE CONTACT RECORD OR YOUR DATA ENTRY WILL HAVE TO BE RE-ENTERED!

Member Only Information
General Information
► National Board Information
Scholar Eligibility (Admin Use Only)
> Address
Communication Preferences
Demographics
▶ Tags and Groups
Save Save and New X Cancel

- a. <u>Member Only Information Tab</u>: Review these fields. It will be Chapter dependent as to whether or not any of these fields are used.
- b. <u>General Information Tab</u>: Fill in the Household Name and Household Postal Greeting. This is important for official letters such as tax letters. Fill in any other fields per Chapter conventions that are applicable. Contact the member for special cases such as "The Honorable Robert Fannin and Dr. Lisa Fannin." NOTE: If a member has filled in their member profile, some of these fields may already be populated.

▶ Member Only Informati	on
 General Information 	
	Member, Friend of ARCS and University Contact Household Addressee used for addressing luncheons, tax letters and thank you's (i.e. Mr. and Mrs. Joe Jones, Mrs. Ralph Matteucci, Ms. Anna Maria Matteucci)
Household Name	Dr. and Mrs. Fernando Pc
	Member, Friend of ARCS, and University Contact Household Postal Greeting for tax letter and thank you's (i.e. Dear Mr. and Mrs. Jones, Dear Mrs. Matteucci)
Household Postal Greeting	Dr. and Mrs. Ponce
	Use this field for name badges so that only those with important titles will show on name badges. Place the title in the text box i.e. Dr., Hon., Gen.

c. <u>Address Tab</u>: Here is the place to update and add addresses. Be sure to select which address is the Primary location for the contact. Address selections include Home, Work, Main, Other, Billing. Include Unit or Apt numbers with the Street Address i.e. 19 East 13th Street, Unit 23.

- Address	
Address Location Type Home	▼ Primary location for this contact □ Billing location for this contact Delete this address
Use another contact's address 😨	
Street Address (?)	
19 E. 13th Street	
Supplemental Address 1 😧	
Supplemental Address 2	
City	Zip / Postal Code Suffix
Tempe	85281
Country	State/Province
United States × v	Arizona × v
Latitude, Longitude () 33.4142324, -111.938762	
Override automatic geocoding	0

d. <u>Communication Preferences Tab</u>: Here is the place to customize Addressee per Chapter protocol. Examples include but are not exclusive to: Married members are addressed with Prefix., First Name, Last Name i.e. "Mrs. Diane Might," "Dr. Lisa Fannin." Widowed members are addressed as Mrs., Husband First Name, Last Name i.e. "Mrs. Ralph Matteucci" unless they have specified otherwise. Special cases exist i.e. Mrs. Dawn Carson Senger. When in doubt, confirm with the member. Note: Members have the option to change Addressee, when they fill out their online Member Profile. Sometimes they do not capitalize their name or addresses, so it is up to the VP of Membership or Web Administrator to edit on their Contact Record, when discovered.

Communication Style 😰 💿 Fo	nal 🔿 Familiar	
Email Greeting	Postal Greeting Addressee	
Dear Sharon	Dear Sharon Mrs. Sharon Ponce	
Privacy (?	Preferred Method(s) Preferred Language	
Do not email	English (United States)	
Do not mail	O Postal Mail	
Do not sms	SMS	
Do not trado	□ Fax	

e. <u>Demographics Tab</u>: Here is the place to indicate gender, birthdate and if the contact is deceased. Have the deceased data available, if known, as it will ask for it.

- Demographics
Gender O Female O Male O Transgender
Date of Birth
Contact is Deceased

- f. <u>Tags and Groups Tab</u>: This is another place to update groups and/or tags in addition to the tabs at the top of the contact record. If you would like a tag added that is not on the list, contact <u>is.help@arcsoundation.org</u>
- g. BE SURE TO SELECT SAVE WHEN DONE!!!

MEMBERSHIP DASHBOARD

The **Memberships Dashboard** is a valuable tool to access membership data. If membership data entry has been done correctly, the following can be accessed: different membership types, how many memberships have been added in each group (by month and year), the total number of members of each membership type as well as the totals of members added by month, year, etc. By clicking on any of the blue numbers, you can view the members that are included in that count. Recent member activity is shown at the bottom of the chart.

Note: Please contact <u>is.help@arcsfoundation.org</u>, if the Chapter membership types are not correct so the Chapter's **Membership Dashboard** can be modified to reflect actual Chapter membership types.

Here is how to access membership data and utilize the Memberships Dashboard:

Step 1: Log In

Step 2: Select CiviCRM > Memberships > Dashboard For the sake of demonstration see the Phoenix dashboard below.

Step 3: Click one of the total numbers in the far column to the right of the **Members by Type** that you want to view. A screen that lists the members with that particular membership type will appear. For example, **Active Members**.

lembership Summary 🖗										
lembers by Type	June	June - (Last Month)			July (MTD)			(YTD)	Current #	
	New	Renew	Total	New	Renew	Total	New	Renew	Total	
Active Member (Phoenix)	0	0	0[0]	1	1	2 [2]	6	46	52 [52]	60 [60] 🎽
Associate Member (Phoenix)	0	0	0[0]	0	0	0[0]	0	2	2 [2]	2 [2]
Existing Life Member (Phoenix)	0	1	1 [1]	0	0	0[0]	0	1	1 [1]	13 [13]
New Life Member (Phoenix)	0	0	0[0]	0	0	0[0]	0	0	0[0]	0[0]
Honorary Member (Phoenix)	0	0	0[0]	0	0	0[0]	0	0	0[0]	7 [7]
Scholar Alum Member (Phoenix)	0	0	0[0]	0	0	0[0]	0	0	0[0]	0[0]
Non-Resident (Phoenix)	0	0	0[0]	0	0	0[0]	0	0	0[0]	0[0]
Chapter Board Member (Phoenix)	8	0	8 [8]	0	0	0[0]	8	1	9[9]	37 [37]
National Board Member (Phoenix)	0	0	0[0]	0	0	0[0]	0	0	0[0]	10 [10]
Totals (all types)	8	1	9 [9]	1	1	2 [2]	14	50	64 [64]	129 [129

Step 4: To create a list in alphabetical order, click on the arrow in front of the column heading **Name**. You can also sort by <u>any</u> other column heading, as needed, using the arrows in front of the column heading (i.e. **Type, Member Since, Start Date, End Date, Source, Status**). See screenshot below.

Fir	nd N	lembershi	ps									Ð	
•	Edit	Search Crite	eria										
58 Results				Membership Status In New, Current, GraceAND Membership Type In Active Member (Phoenix)									
Se	elect	Records:		All 58 records O Selected records only									
6	Action	ons			¥								
	Next	> Last>>	Member 1 -	50 of 58						Page	1	🗘 of 2	
		Name	Туре	Member Since	♦ Start Date	♦ End Date	≜ Source	Status	Auto- renew?				
	a	Alexander, Diana	Active Member (Phoenix)	July 1st, 2011	July 1st, 2011	June 30th, 2019	General ARCS Member Membership: Offline membership signup (by Mrs. Diane Might)	Current		View	Edit	Renew►	
	ê	Austerman, Ceda	Active Member (Phoenix)	July 1st, 2016	July 1st, 2016	June 30th, 2019	Member - Hawes	Current		View	Edit	Renew ►	
	a	Berens, Patty	Active Member (Phoenix)	July 1st, 2016	July 1st, 2016	June 30th, 2019	Active Member Membership: Offline signup (by Mrs. Diane Might)	Current		View	Edit	Renew	

Step 5: Select **Actions**. A dropdown list of **Actions** appears. This list provides a selection of functions such as export memberships, make mailing labels, update multiple memberships, etc. Note that an action can be performed on all of the records by selecting the top left radio button **All Records.** In the example below, the action selected was **Mailing Labels** for **All 76 Members**. Follow the prompts and mailing labels can be printed.

I	Find Membersh	nips										Ð
	• Edit Search Cri	teria										
	76 Results Select Records:				Membership Status In New, Current <i>AND</i> Membership Type In Active Member (Phoenix), Associate Member (Phoenix), Existing Life Member (Phoenix), New Life Member (Phoenix), Honorary Member (Phoenix) All 76 records 0 Selected records only							
	⊘ Actions											
	Delete memberships Email - send now									Page	1	of 2
	Export members Mailing labels - print			♦ Start Date	♦ End Date	Source		Status	Auto- renew?			
	Print selected rows Print/merge documen Update multiple memi	t for memberships berships		July 1st, 2011	June 30th, 2018	General ARCS Member Membe membership signup (by Mrs. Dia	rship: Offline Cur ane Might)	rent		View	Edit	Renew >
	Anixter, Nancy	Existing Life Member	July 1st, 1993	July 1st, 1993			Cun	rent		View	Edit	Renew •

Actions can also be performed on selected records. To perform actions on **Selected Records Only**, check the box in front of the desired name(s) and then select the **Actions** dropdown list. Select the action to be performed. For example, in the screenshot below, five new members were selected. Any of the **Actions** in the dropdown can then be performed, on these new members.

Fi	nd N	lembershi	ps									8	
•	Edit Search Criteria												
60 Results Membership Status In New, Current, Grace AND Membership Type In Active Member (Phoenix)													
S	elect l	Records:	0	All 60 records	💿 5 Sele	cted records	sonly						
	Act	ons			*								
					_								
	Next	> Last >>	Member 1 - 50 of	60					Pa	age 1	¢ 0	f 2	
		Name	Type	 Member Since 	Start Date	♦ End Date		Status	Auto- renew?				
	a	Rorbach, Elizabeth	Active Member (Phoenix)	July 3rd, 2017	July 1st, 2017	June 30th, 2018	Online Contribution: PHOENIX MEMBERSHIP PAYMENT AND RENEWAL	New		View	Edit	more >	
	a	Jobe, Marcia	Active Member (Phoenix)	April 19th, 2017	April 19th, 2017	April 19th, 2018	Member - Flowers	Current		View	Edit	more >	
	a	Foulds, Lois	Active Member (Phoenix)	April 5th, 2017	April 5th, 2017	June 30th, 2018	Member-Plenge	Current		View	Edit	more >	
	a	Ram, Janaki	Active Member (Phoenix)	April 4th, 2017	July 1st, 2016	June 30th, 2018	Online Contribution: PHOENIX MEMBERSHIP PAYMENT AND RENEWAL	Current		View	Edit	more •	
	6	Ponce, Sharon	Active Member (Phoenix)	March 28th, 2017	March 28th, 2017	June 30th,	Ponce, Adele	Current		View	Edit	more •	

NOTE FOR NEW MEMBERSHIPS DATA ENTRY: When entering new memberships, the system will not allow **Member Since** and **Start Dates** to be in the future. These dates cannot be changed on the new member's contact record until after the start of the new fiscal year on July 1. The system does allow **End Dates** in the future. **After July 1, it is important to change their Member Since** and **Start Dates to the start of the fiscal year they joined.**

FIND MEMBERSHIPS

While the **Membership Dashboard** is the easiest way to quickly access membership data, **Find Memberships** allows access to even more data. **Log in > CiviCRM > Memberships > Find Memberships**. The screenshot below shows the variety of functions available to access member data and perform actions on, as needed.

Home » CiviCRM » CiviCRM	
Find Membershine	
r ind memberships	2
- Edit Search Criteria	
Member Name or Email Search	
Membership Type(s) - any - •	fembership Status
Source P	Primary Member? 😮 🔿 Yes 🔿 No
Membership is a Test? ②	Pay Later? ◯ Yes ◯ No
А	uuto-Renew? O Yes O No
Member Since	
- any -	
Start Date	
- any -	
End Date	
- any -	
✓ Search	

Depending on the task at hand, more than one type of **Membership Type** and **Membership Status** can be selected and searched for. See screenshot below. Be sure to select **Search** once the criteria are selected.

Find Memberships	8
- Edit Search Criteria	
Member Name or Email	Search
Membership Type	Membership Status

Membership Advanced Search

Advanced Search is another method to access membership data and perform even more refined searches than Find Memberships and the Memberships Dashboard.

Step 1: Log In

Step 2: Go to CiviCRM > Search > Advanced Search

Step 3: At the top of the page there are criteria that can be selected depending on what is being searched for. Note that if a contact is ever accidentally deleted, you can search for it in trash and restore it. See blue arrow in the screenshot below.

 Search Criteria () 		
 Display Settings For Results 		
Display Results As Contacts	Vie - c	ws For Display Contacts 😧
✓ Search Settings		
Search Operator ?	Search in Trash	✓ Search
O AND O OR	(deleted contacts)	C Reset Form
→ Basic Criteria		
Complete OR Partial Name	Complete OR Partial Email	Contact Type(s)
		v v
Group(s) (search by group type)	Select Tag(s)	All Tags 🕢
· · · · · · · · · · · · · · · · · · ·		
Phone	- any -	Phone Type
Punctuation and spaces are ignored.		
• Exclude O Include by Privacy Option(s) 🚱		Preferred Communication Method
· · ·		- any - v
Contact Source 7	Job Title	Preferred Language
		- any -
Contact ID 🥑	External ID 🕜	CMS User? O Yes O No
		Does the contact have a Drupal Account?

Step 4: Scroll to the **Memberships** tab and select criteria as needed. Other tabs can also be selected to expand the search as needed.

Custom Fields	
Activities	
➤ Relationships	
► Demographics	
▶ Notes	
➤ Change Log	
➤ Contributions	
▶ Pledges	
- Memberships	
Membership Type(s)	Membership Status
- any - 🔻	×
Source	
	Primary Member? 😮 🔿 Yes 🔿 No
Membershin is a Test?	Pay Later? O Yes O No
	Auto-Renew? OYes ONo
Member Since	
- any -	
Start Date	
- any -	
End Date	

MEMBERSHIP REPORTS

A variety of reports can be created to access membership data. The screenshot below is an example of **Member Reports** that can be set up.

Step 1: To view a report from the list below either Login > CiviCRM > Reports > Membership Reports > View Results or select a report from the list and select Refresh Results to view results. The latter will be used in the example below. From the following list select the Membership Report (Details) Active and Associate Members.

- Member Reports			
» Contribution and Membership Details	Contribution details for any type of contribution, plus associated membership information for contributions which are in payment for memberships.	View Results	mor
» General Member List for Events	List of General Members	View Results	mo
» Membership Report (Detail) - Active & Associate Members	Provides a list of members along with their membership status and membership details (Join Date, Start Date, End Date).	View Results	mo
» Membership Report (Detail) - Chapter Board Members	Provides a list of current Chapter Board members along with their membership status and membership details (Join Date, Start Date, End Date).	View Results	mo
» Membership Report (Detail) - Existing Life & New Life Members	Provides a list of Existing Life & New Life members along with their membership status and membership details (Join Date, Start Date, End Date).	View Results	mo
» Membership Report (Detail) - For National Chapter Profile - Active, Associate, Honorary from Previous Year	Determine previous year's membership for the Nat'l Chapter Profile. Start & End dates must be updated annually to reflect the prior year. Provides member names along with their membership Join Date, Start Date, End Date.	View Results	mo
» Membership Report (Detail) - For National Chapter Profile - Existing Life and New Life Members from Previous Year	Determine previous year's membership for the Nat'l Chapter Profile. Start date must be updated annually to reflect the prior year. Provides member names along with their membership Join Date, Start Date, End Date.	View Results	mo
» Membership Report (Detail) - Honorary Members	Provides a list of members along with their membership status and membership details (Join Date, Start Date, End Date).	View Results	mo
» Membership Report (Lapsed)	Provides a list of memberships that lapsed or will lapse before the date you specify.	View Results	mo
» Membership Report (Summary) - By Month, Year and Type	Provides a summary of memberships by type and join date.	View Results	mo
» Membership Summary	Provides a summary of memberships by type and join date.	View Results	mo
» Roster Details - General Member	List of General	View Results	mo

Step 2: Select **Refresh Results** to view the report. Update tabs at the top of the page such a **Column, Filters, Title and Format,** as needed. Refresh results as often as needed to review updates until the report yields the desired information. See the screenshot below.

Note: End dates on the report below will not update to the new fiscal year unless a membership renewal has been recorded. Before contacting members who do not show a renewal, contact the Treasurer/Assistant Treasurer to confirm they have not renewed. Make sure all member dues are reconciled before the end of September or they will go from **Grace** on July 1 to **Expired** on September 30.

		, , , , , , , , , , , , , , , , , , , ,										
Columns Groupin	ng Sorting	Filters Title and	Format Email Delivery	ccess								
Refresh results												
O Actions			T			+ Add Cont	acts to Grou	p				
Grouping(s)	Membership											
Membership Types	Is one of Ac	tive Member (Phoe	nix), Associate Member (Phoe	enix)								
Status	Is one of Ne	w, Current, Grace										
Contribution Status	Is Complete	d										
Next > Last >>	 Records 1 	- 50 of 62						Page 1 🗘 of 2				
Contact Name	First Name	Last Name	Membership Type	Start Date	End Date	Join Date	Status	Email				
Alexander, Diana	Diana	Alexander	Active Member (Phoenix)	July 1st, 2011	June 30th, 2018	July 1st, 2011	Current	diana616062@gmail.com				
Austerman, Ceda	Ceda	Austerman	Active Member (Phoenix)	July 1st, 2016	June 30th,	July 1st, 2016	Current	cedaausterman@cox.net				

Step 3: There is a dropdown menu to perform various **Actions** on the reports. For example, if updates need to be saved, be sure to select **Save** from the dropdown menu. Very nice reports can be printed and exports to CSV can be converted to Excel format. If a similar report needs to be created, **Save a Copy** and update the tabs, as needed.

N	lembership Report (Detail) - Active & Associate Members													0
	Columns	Grouping	Sorting	Filters	Title and Form	at Emai	I Delivery	Access						
ĺ	Refresh rea	sults												
	⊘ Actions		*						+ Add Contacts to Group			•		
	Save													
-	Save a Cop	у												
	Print Repor	t				ssociate N	lember (Pl	oenix)						
-	Print to PD	F												
	Export as C	sv												
	Delete repo	ort												
l	Next >	Last >>	Records 1	- 50 of 6	2							Page	1 🗘 of 2	

Membership Relationship Reports

Relationship Reports are another way to access membership data. To create or access **Relationship Reports**, select **Contacts > Contact Reports** or select **Reports > Contact Reports**. The screenshot below shows **Relationship Reports** that a Chapter can set up. If a Chapter has been entering its membership relationship data, the following two reports can be created: **Current Chapter Board Positions** and **Member Board Position History**.

» Relationship Report - Current Chapter Board Positions	Important: Note how start and end dates are entered. Update the start and end dates annually to get current Chapter Board. Other years can also be accessed by changing start and end dates.	View Results	more •
» Relationship Report - Current Scholar and Individual Sponsor.	Gives relationship between a scholar and the individual who sponsors them. Annually, when new scholars are selected, update the filter start and end date.	View Results	more •
» Relationship Report - Current Scholar and Organization	Gives relationship between a scholar and the organization who sponsors them. Annually, when new scholars are selected, update the filter start and end date.	View Results	more •
» Relationship Report - Member Board Position History	Use for ARCS Light Selection. Gives relationship between Board member position and ARCS Phoenix.	View Results	more •
» Relationships - All Contacts	Gives relationship details between two contacts	View Results	more •

The **Member Board Position History** report contains the volunteer history data for all members needed to determine the ARCS Light Award. There is no need to print anything. Just have the ARCS Light Committee Members login to access this report. They can scroll down to see the volunteer history of each general member. See screenshot below. Note: They will need temporary Admin permission to view these reports. Contact the Website Administer to provide temporary permission.

Relationship Report - Member Board Position History								
Columns Sortin	g Filters Title and Format Email Delivery Ad	ccess						
Refresh results								
	T		+ Add Contacts to	Group	•			
Contact Type A Is	Individual							
Contact Type B Is	Organization							
Group Is	phx_General Member							
Next > Last >	 Records 1 - 50 of 456 			Page	1 🗘 of 10			
Contact A	Contact B	Relationship B-A	Relationship Start Date	Relationship End Date	Description			
Alexander, Diana (3006)	Achievement Rewards for College Scientists Foundation, Inc, National (39241)	Member-Council of Advisors (ARCS National)	2016-07-01	2017-06-30				
Alexander, Diana (3006)	Achievement Rewards for College Scientists Foundation, Inc, National (39241)	National Board Member	2012-07-01	2013-06-30				
Berens, Patty (40586)	ARCS Foundation - Phoenix Chapter (6526)	Corresponding Secretary	2016-07-01	2017-06-30				
Bray, Jill (42013)	ARCS Foundation - Phoenix Chapter (6526)	Chair/VP/Director of University Relations	2017-07-01	2018-06-30				
Brewer, Melanie (39751)	ARCS Foundation - Phoenix Chapter (6526)	Chair/VP/Director of Data Management/Web Site Committee	2006-07-01	2009-06-30	3 years			
Brewer, Melanie (39751)	ARCS Foundation - Phoenix Chapter (6526)	Chair/VP/Director of Field Trips	2011-07-01	2012-06-30				

The Current Chapter Board Positions report lists the current Board positions. See screenshot below

Relationshi	telationship Report - Current Chapter Board Positions							
Columns So	orting Filters Developer Title an	d Format Email Delivery Acces	SS					
Refresh result	5							
		¥		Add Contacts to G	iroup	Ŧ		
Contact Type A	Is Individual							
Contact Type E	Is Organization							
Start Date	Between and July 1st, 2017							
End Date	Between June 30th, 2018 and							
Group	Is phx_2017-2018 Chapter Board							
Contact A	Contact B	Relationship A-B	Relationship B-A	Relationship Start Date	Relationship End Date	Description		
Bray, Jill (42013)	ARCS Foundation - Phoenix Chapter (6526)	r Chair/VP/Director of University Relations of	Chair/VP/Director of University Relations	2017-07-01	2018-06-30			
Browner, Carol (41508)	ARCS Foundation - Phoenix Chapter (6526)	r Chair/VP/Director of Newsletter of	Chair/VP/Director of Newsletter	r 2015-07-01	2018-06-30	3 Years		
Burton, Christine (3009)	ARCS Foundation - Phoenix Chapter (6526)	r Chapter Board Member-at- Large/Director-at-Large of	Chapter Board Member-at- Large/Director-at-Large	2017-07-01	2018-06-30			

Note: In order to keep this report current, be sure to do the following annually: 1) Add the Chapter Board position relationships on each current Board member's contact record. 2) Update the report **Filter** dates to the new fiscal year. Filling in the start and end dates under the **Filter** tab are not intuitive and must be entered and updated annually as follows:

Start Date	Choose Date Range × From: To: 07/01/2017 *
End Date	Choose Date Range × From: 06/30/2018 * To:
And the Desident	

For further assistance with relationship reports contact is.help@arcsfoundation.org

Membership Groups

Groups are very important for emails, mailings, and any other actions relating to contacts. It is important that they be kept current by the VP Membership or the Web Administrator. Groups will vary based on Chapter convention. Two membership groups that every Chapter should have are a current General Member group and a Chapter Board Group.

In Phoenix for example, to access the **Group** containing <u>all</u> Chapter members select **Login > CiviCRM > Contacts > Manage Groups.** Scroll to **phx_General Member > Contacts**. The General Member group includes all membership types for the chapter i.e. Active, Associate, Existing Life, and Honorary members. Other membership groups to keep current are the Chapter Board members, Members Without Emails, and Prospective Members. Members can be added or removed from groups through either a member's contact record or through **Contacts > Manage Groups**.

IMPORTANT NOTE: 1. Chapter prefixes followed by an underscore must be in <u>all</u> group titles. 2. REMOVE but NEVER DELETE a member from a group!!

Confirm a Membership Group is Correct

After updating or creating a membership group confirm that it is correct.

Step 1: Login > CiviCRM > Select Contacts Tab on Black Line
Step 2: Select Manage Groups
Step 3: Scroll to the group of interest
Step 4: Select Contacts
Step 5: Confirm the contacts are correct for that group.

How to Remove Contacts from a Group

It is often necessary to remove members from a Group i.e. member's going off the Chapter Board need to be removed from the Chapter Board Group and members who resign or are deceased need to be removed from the General Member Group. A fast way to do this rather then going into each contact record is to:

Step 1: Login > CiviCRM > Select Contacts Tab on Black Line

Step 2: Select Manage Groups

Step 3: Scroll to the group that contacts need to be removed from.

Step 4: Select Contacts

Step 5: Check the box(es) in front of the name(s) that need to be removed.

Step 6: Select Actions

Step 7: Select Remove Contacts from Group

Step 8: Select View Selected Contacts

Step 9: If you are sure these are the contacts you want to remove from the group, select **Remove from Group**.

Note: <u>Never delete</u> a contact from the group or the contact record will be deleted. Contact the Web Administrator or <u>is.help@arcsfoundation.org</u> immediately to restore the contact or Login > Search > Advanced Search > Search in Trash > the box in front of the record you want to restore > Actions > Restore Contacts

How to Add Contacts from One Existing Group to Another Existing Group

Step 1: Login > CiviCRM > Select Contacts Tab on Black Line
Step 2: Select Manage Groups
Step 3: Scroll to the group that has contacts you would like to add to another group.
Step 4: Select Contacts
Step 5: Check the box(es) in front of the name(s) that need to be added to another existing group or if all need to be added check the box in front of the Status column heading.
Step 6: Select Actions
Step 7: Select Add Contacts to Group
Step 8: Make sure radio button Add Contact to Existing Group is selected
Step 9: - Select Group Step 10: Select the Existing Group to add the contact(s) to
Step 11: Select View Selected Contacts.

Step 12: If certain these are the contacts to add to this existing group, select Add to Group.

How to Create a Group and Add Contacts

- Step 1: Login > CiviCRM > Select Contacts Tab on Black Line
- Step 2: Select Manage Groups
- Step 3: Select Add Group

lome » CiviCRM							
Manage Groups							
• Add Group							
Use Groups to organize contacts (e.g. these contacts are part of our 'Steering Committee'). You can also create 'smart' groups based on contact characteristics (e.g. t group consists of all people in our database who live in a specific locality). 🚱							
Find Groups							
Find	Created By	Туре	Visibility	Status			
		Access Control Mailing List	(Enabled			
Complete OR partial group name.	Complete OR partial creator name.	☐ Access Control ☐ Mailing List Filter search by group type(s).	- any visibility -	🗹 Enabled	D		

Step 4: Enter **Name** and **Description** of the new group, check **Mailing List** and select **Continue.** See example in screenshot below.

🏷 New Group	e	₽ ×
Enter a unique name and a	a description for your new group here. Then click 'Continue' to find contacts to add to your new group.	
Name *	phx_University Main Point of Contact	
Description	University Reps who are the 3 main points of contact. One for ASU, one for NAU and one for U of A.	
	Group description is displayed when groups are listed in Profiles and Mailing List Subscribe forms.	
Group Type	C Access Control V Mailing List 🚱	
Visibility *	User and User Admin Only	
Reserved Group?	If reserved, only users with 'administer reserved groups' permission can disable, delete, or change settings for this group. The reserved flag does NOT affect users ability to add or remove contacts from a group.	
Parent Groups 🚱		
Add Parent	- select group -	
	✓ Continue × Can	cel

Step 5: Find contacts that will be in the new group. If the contacts to be added can be narrowed down by **Contact Type, Group,** and/or **Tag**, enter and select **Search**. Contacts can also be added individually to the group by using the **Name or Email** box. If neither of these approaches work, another method is to simply select **Search**, as in the example below, and all contacts in the Chapter database will appear. If the individual cannot be found they will have to be added. See <u>New Individual</u>.

Add to Group: phx_University Main Point of Contact							
 Find Contacts to Name or 	Add to Email	this Group					
	is	- any contact type -					
	in	- any group -					
✓ Search	with	- any tag -					

Step 6: Select the records to add to the group by checking the box in front of each name to be added. For this group the three selected records that need their boxes to be checked are Cason, Voorhees, and Watwood. After the three contacts for this group are selected, select Add Contacts to phx_University Main Point of Contact.

Ad	Add to Group: phx_University Main Point of Contact										
+	Edit Search Criteria										
19 Se	1917 Contacts » Advanced Search Select Records: O All 1917 records 3 Selected records only Add Contacts to phx_University Main Point of Contact Image: Contact Search										
~~	First	< Previous Next > Last >> Conta	ct 301 - 350 of 191	7					Pa	ge 7 🌲	of 39
A	В	C D E F G H I J K L	M N O P	Q R S	TU	v <u>w</u> x	<u>Y</u> <u>Z</u> {	All			
ж	Reset :	all selections									
		A Name	Address	City	State	Postal		Email	Phone	Action	
	8	Casey, Shirley								View Ed	it more ►
	a	Cason, Jennifer	Arizona State Unive	Tempe	AZ	85287- 1003	United States	jennifer.cason	480- 965- 8968	View Ed	it more ►

Step 7: The following screen will appear to view the selected contacts. If they are correct, select **Add to Group**.

Home » CiviCRM » CiviCRM	
Add Contacts: phx_University Main Point of Contact	_
Group phx_University Main Point of Contact	
Number of selected contacts: 3 View Selected Contacts	
✓ Add to Group X Cancel	

Step 8: The group **phx_University Main Point of Contact** is now created with all three contacts added.

Cor	ntacts	in	Group: phx_U	niversity Main Po	oint of C	Contact							8
0	Add Con	itacts	to phx_University Ma	ain Point of Contact									
+	Find Co	onta	icts within this Gro	oup									
30	ontact	s	Group(s) In Group Statu	phx_University Main Poi s "Added"	nt of Conta	ctAND					» Adv	ance	d Search
Sel	ect Rec	ords	: O All 3 rec	ords 🔘 0 Selected rec	ords only								
1	Actions												
А	вс	D	EFGHI	JKLMNO	D P Q	RS	TU <u>V</u>	<u>w</u> x y z	All				
×F	eset all se	electio	ons										
	Status		Name	Address	¢ City	State	Postal	Country	🔷 Email	Phone	Action		
	Added	8	Cason, Jennifer	Arizona State Unive	Tempe	AZ	85287-1003	United States	jennifer.cason	480-965-8968	View	Edit	more •
	Added	8	Voorhees, Dorian	Assistant Dean Grad	Tucson	AZ	85721	United States	vorhees@grad.a	520-621-3471	View	Edit	more •
	Added	8	Watwood, Maribeth	P.O. Box 4125	Flagstaff	AZ	86011	United States	maribeth.watwo	928-523-9322	View	Edit	more •

Step 8: To add more contacts, go to Contacts > Manage Contacts > phx_University Main Point of Contact > Add Contacts to phx_University Main Point of Contact and repeat above <u>or</u> go to the contact record of the individual to be added to the group and add them to that group by selecting the Groups tab > + Add to a Group

Membership Smart Groups

Creating **Smart Groups** can be useful depending on the task at hand. To create **Smart Groups** use **Advanced Search**. Whether you choose to find contacts, contributions, participants, awards, or memberships, once you have your search results, one of the options available in the **–Actions-** drop down menu is **Group – create smart group**. The benefit of smart groups is that they automatically update based on the specified search criteria. If assistance is needed setting up **Smart Groups**, contact is.help@arcsfoundation.org

For the sake of demonstration, a Phoenix example is shown below. Suppose a Chapter wants to do a mailing specific to Active membership types.

Step 1: Login > CiviCRM > Search > Advanced Search > Memberships
Step 2: Select Membership Type: Active Member (Phoenix)
Step 3: Select Membership Status: New and Current

- Memberships	×
Membership Type	Membership Status
X Active Member (Phoenix)	New Current Q

Step 4: Select Search

Advanced Search									
▶ Edit Search Criteria 📀									
60 Contacts Membership Status In New, CurrentAND Membership Type = Active Member (Phoenix) > Search Builder Select Records: O All 60 records O Selected records only									
⊘ Actions	Y								
Next > Last >> Contact 1 - 50 of 60						Page 1 🗘 of 2			
<u>A</u> <u>B</u> <u>C</u> <u>D</u> <u>E</u> <u>F</u> <u>G</u> <u>H</u> I <u>J</u> <u>K</u> <u>L</u>	M N O P Q	RSTU	<u>V</u> <u>W</u> X Y	Z All					
Reset all selections									
Name Address	City	State Post	al 🔶 Country	Email	Phone	Action			
🗋 🔒 Alexander, Diana				diana616062@gm		View Edit more >			
Austerman, Ceda 9840 North 110th S	Scottsdale	AZ 85259	United States	cedaausterman@	480-745- 9418	View Edit more ►			
Berens, Patty 24 East Wagon Wh	el Phoenix	AZ 85020	United	pattyberens@gm	602-388-	View Edit more ►			

Step 5: Select All 60 Records > Actions > Group - create smart group

	Advanced Sea	arch							Ð
	Edit Search Criteria								
	60 Contacts	Membership Status In New, Curr Membership Type = Active Mem	ent <i>AND</i> ber (Phoenix)						» Search Builder
	Select Records: O All 60 records O Selected records only								
	⊘ Actions		*						
		(2						
	Email - unnoid addresses								Page 1 2 of 2
	Export contacts								
	Group - add contact	N O P	QRS	TUV	W X Y				
	Group - create sma	rt group							
	Group - remove con	Group - remove contacts		State	Postal	Country	Email	Phone	Action
	Mailing labels - print	Mailing labels - print					diana616062@gm		View Edit more -
	Map contacts Merge contacts Print selected rows		Scottsdale	AZ	85259	United	cedaausterman@	480-745-	View Edit more >
						States		9418	
			Phoenix	AZ	85020	United States	pattyberens@gm	602-388- 4854	View Edit more
	🗆 🔮 Bray, Jill	519 West Coronado	Phoenix	AZ	85003	United	jillgbray@gmai	602-617-	View Edit more ►

Step 6: Fill in the following - **Name:** phx_Active Members. **Description**: Use for mailing Active i.e. First Dues Reminder. **Group Type**: Mailing List. In this case, **Add Parent**: phx_General Member, since Active Members are a child group of General Members. When a child group membership is renewed, it will automatically update the parent General member group due to the way the criteria for this **Smart Group** was set up. Expired memberships will automatically be removed from the parent group. Be sure to select **Save Smart Group**.

Advanced Search		₽				
Smart Group						
This smart group will stay to Membership Sta Membership Type (learn more)	This smart group will stay up-to-date with all contacts who meet the search criteria. • Membership Status In New, Current • Membership Type = Active Member (Phoenix) (learn more)					
Name *	phx_Active Members - New/Curre					
Description	Use for mailings specific to Active members i.e. First Dues Reminders.					
Group Type	Z Mailing List					
Parent Groups 😯						
Add Parent	phx_General Member × v					
✓ Save Smart Group ★	Cancel					

Once the group is created, go to **Contacts > Manage Groups**, and check to make sure the phx_Active Members Group is a child group of the parent phx_General Member group and contacts match those **Active Members** on the **Memberships Dashboard**. Other smart groups can be set up the same way for Honorary Members, as well as Existing and New Life Members. See screenshot below.

It is critical that Memberships be kept up to date so that the Smart Groups and the Parent Group stay current. It is worthwhile to double check that the General Group total count equals the total count on the Dashboard of Active, Associate, Honorary, Existing Life and New Life member combined. If the counts don't match, then the discrepancy needs to be resolved. It's a good way to make sure data entry is correct.

 phx_General Member 	unknown		General Member - All New and Current Phoenix Memberships, including Active, Associate, Honorary, Existing Life ad New Life Memberships. Use for Mailings and Addressing Luncheons.	Mailing List	User and User Admin Only	Contacts	Settings	more >
Existing Life and New Life Members - New/Current (Smart Group)	unknown	Might, Diane	Existing Life and New Life Member Members - Since they do not have to renew memberships, use for a mailing to remind them to update their Member Profile and Volunteer Interests and Skills.	, Mailing List,	User and User Admin Only	Contacts	Settings	more •
Honorary Members - New/Current (Smart Group)	unknown	Might, Diane	Honorary Members - Use for mailings	, Mailing List,	User and User Admin Only	Contacts	Settings	more >
phx_Active Members - New/Current (Smart Group)	unknown	Might, Diane	Active Member - Use for mailings specific to Active Members i.e. Dues Reminder	Mailing List	User and User Admin Only	Contacts	Settings	more >
phx_Associate Memberships - New/Current (Smart Group)	unknown	Might, Diane	Associate Member - Use for mailings specific to Associate Members	Mailing List	User and User Admin Only	Contacts	Settings	more >