

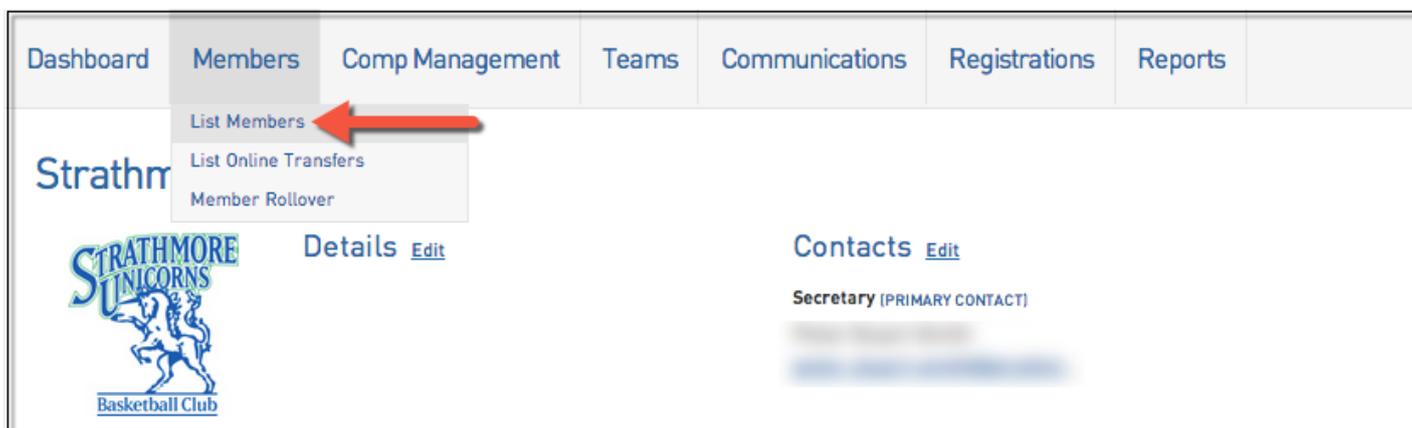
Changing Member Record Types

Last Modified on 03/12/2016 12:46 pm AEDT



Member Record Types are used to group members together based on the types set up by an Organisation at each level of the database. Every member that registers to a Club or Association is assigned a Member Record Type. The Member Record Types assigned to a member can be viewed on the Members Record and can also be reported on via the Reporting tool. For accurate reporting it is important that members are assigned the correct Member Record Type. The following steps describe how to modify the Member Record Type of a registered member.

1. Use the Member Search Functionality to retrieve the member record that you would like to modify. Alternatively, from your dashboard, click on Members and from the drop down menu select List Members. The list of members that belong to your club will appear. Click on the magnifying glass to the left of the member's name you wish to edit. Once you have clicked on the magnifying glass, you will be directed to the member's dashboard.

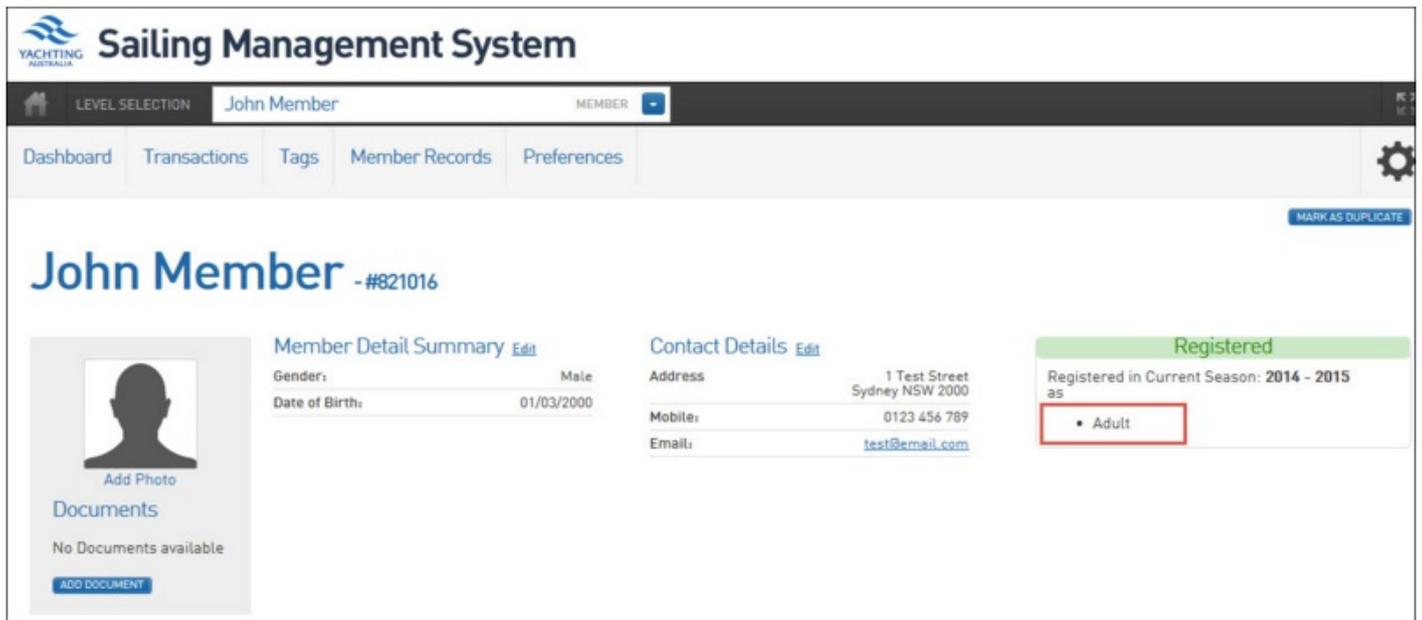


Members List

Showing - Family Name including

	Family name	Legal first name
	Member	John
		John
		Sam
		Christopher
		William

2. The Member Record Type currently assigned to the member is displayed on the right side of the members dashboard below the registration status.



The screenshot shows the Sailing Management System dashboard for a member named John Member (#821016). The dashboard includes a navigation menu with options like Dashboard, Transactions, Tags, Member Records, and Preferences. The main content area displays the member's details, including a profile picture placeholder, a 'Documents' section, and a 'Registered' status box. The 'Registered' box shows the member is registered for the 2014-2015 season as an 'Adult', which is highlighted with a red box.

Sailing Management System

LEVEL SELECTION: John Member MEMBER

Dashboard Transactions Tags Member Records Preferences

John Member -#821016

Registered

Registered in Current Season: 2014 - 2015 as

- Adult

3. Click on Member Records.



The screenshot shows the Sailing Management System dashboard for John Member (#821016). The 'Member Records' tab in the navigation menu is highlighted with a red box.

Sailing Management System

LEVEL SELECTION: John Member MEMBER

Dashboard Transactions Tags Member Records Preferences

John Member -#821016

4. In the Member Records Summary click on the magnifying glass to the left of the

record of which you would like to change the Member Record Type.

The screenshot displays the 'Sailing Management System' interface. At the top left is the 'YACHTING AUSTRALIA' logo. The main header reads 'Sailing Management System'. Below this is a navigation bar with a home icon, 'LEVEL SELECTION', a search bar containing 'John Member', and a 'MEMBER' dropdown menu. A secondary navigation bar includes 'Dashboard', 'Transactions', 'Tags', 'Member Records', and 'Preferences'. The main content area is titled 'Member Records Summary' and contains three summary tables: 'Club Summary', 'State Summary', and 'National Type Summary'. Each table has columns for Entity, Season, Type, Age Group, and Active Date. The first row of the Club Summary table is highlighted with a red box, showing 'Yachting Australia' for the entity, '2014 - 2015' for the season, 'Adult' for the type, 'Under 18' for the age group, and '30/04/2015' for the active date. The National Type Summary table shows 'myClub' as the entity.

Member Records Summary

Club Summary

Entity	Season	Type	Age Group	Active Date
 Yachting Australia	2014 - 2015	Adult	Under 18	30/04/2015

State Summary

Entity	Season	Type	Age Group	Active Date
Yachting Australia [...]	2014 - 2015	Adult	Under 18	30/04/2015

National Type Summary

Entity	Season	Type	Age Group	Active Date
myClub	2014 - 2015	Adult	Under 18	30/04/2015

National Body Summary

5. The member record will appear. The Type is the Membership Record Type currently assigned to the member. Click on the arrow on the right to display a drop down menu with all the Member Record Types that have been set up by the club.

Member Record

To modify this information change the information in the boxes below and when you have finished press the 'Update Record' button.

Note: All boxes marked with a  are compulsory and must be filled in.

Season:	2014 - 2015 
Entity Type:	Club 
Entity:	Yachting Australia 
Type:	Adult 
Age Group:	Under 18 
Active Date:	30/04/2015 
Inactive Date:	<input type="text"/>
Financial:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>

[Update Record](#)

6. From the drop down menu select the appropriate Member Record Type.

Member Record

To modify this information change the information in the boxes below and when you have finished press the 'Update Record' button.

Note: All boxes marked with a  are compulsory and must be filled in.

Season:	
Entity Type:	
Entity:	
Type:	
Age Group:	Under 18 
Active Date:	30/04/2015 
Inactive Date:	<input type="text"/>
Financial:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>

[Update Record](#)

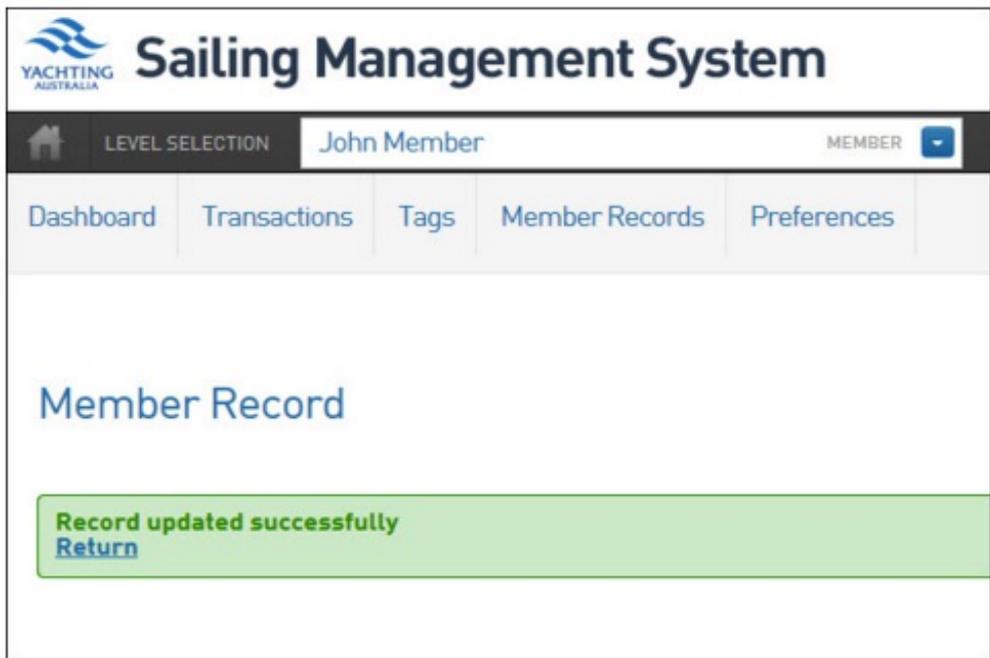
7. Check all details and click on Update Record.

Member Record

To modify this information change the information in the boxes below and when you have finished press the **'Update Record'** button.
Note: All boxes marked with a  are compulsory and must be filled in.

Season:	<input type="text" value="2014 - 2015"/> 
Entity Type:	<input type="text" value="Club"/> 
Entity:	<input type="text" value="Yachting Australia"/> 
Type:	<input type="text" value="Youth (under 18)"/> 
Age Group:	<input type="text" value="Under 18"/>
Active Date:	<input type="text" value="30/04/2015"/> 
Inactive Date:	<input type="text"/>
Financial:	<input type="checkbox"/>
Active:	<input checked="" type="checkbox"/>

8. A message will display that the member record has been updated successfully.



The screenshot shows the Sailing Management System interface. At the top left is the YACHTING AUSTRALIA logo. The main header reads "Sailing Management System". Below this is a navigation bar with a home icon, "LEVEL SELECTION", "John Member", and "MEMBER" with a dropdown arrow. A menu bar contains "Dashboard", "Transactions", "Tags", "Member Records", and "Preferences". The main content area displays "Member Record" and a green message box that says "Record updated successfully" with a "Return" link.

9. The new Member Record Type shows on the member's dashboard below the registration status.



MARK AS DUPLICATE

John Member - #821016



Add Photo

Documents

No Documents available

[ADD DOCUMENT](#)

Member Detail Summary [Edit](#)

Gender: Male
Date of Birth: 01/03/2000

Contact Details [Edit](#)

Address: 1 Test Street
Sydney NSW 2000
Mobile: 0123 456 789
Email: test@email.com

Registered

Registered in Current Season: **2014 - 2015**

- Youth (under 18)

For further assistance please contact Online Services:

onlineservices@sailing.org.au

02 8424 7400

Related Articles

[template("related")]