

a) Viewing the Membership List

Click **Members** from the Home page to view the Membership List page.

There are a couple of features to help quickly navigate around the page:

- Clicking one of the letters in the block above the table [A] will jump to members with a surname starting with that letter.
- Clicking the 'down' arrow in the top right corner of the page will scroll to the bottom of the page. There is a similar 'up' arrow in the bottom right corner to scroll to the top of the page.

The screenshot shows the 'Members' page interface. At the top, there is a 'Quick Find' search bar and a 'Search' button. Below this are filter options for Status (Current, Deceased, Lapsed, Resigned), Poll (any or none, Negate poll), Class (any), and Payment type (any). A message box states: 'Use Quick Find or select filters above to customise list of members. Perform operations on list at bottom of page.' Below the message is a block of letters A through Z, with 'A' highlighted. A red arrow points from the letter 'A' to the table below.

Select	No	Name	Address	Telephone	Class	Status
▲ ▼		A				
<input type="checkbox"/>	1001	Brian Aardatt	1 High Street, Demoton, DM12 7RA	01 001 777 666	Individual	Current
<input type="checkbox"/>	1002	Brian Aardbatt	29 High Street, Demoton, DM12 7RA		Individual	Current
<input type="checkbox"/>	1003	Fred Aardcatt	12 High Street, Demoton, DM12 7RA	07070 987987	Individual	Current

b) Filtering the Membership List

The 'filters' at the top of the Membership List page allow you choose which members are displayed:

- Tick one or more boxes to choose the required membership **Status** [B].
- Choose from the drop-down list [C] to display members belonging to the selected **Poll**. Ticking **Negate poll** displays members that do not belong to the selected poll.
- Choose from the drop-down list [D] to display members belonging to the selected **Class**.
- Choose from the drop-down list [E] to display members that paid for their last membership fee using the selected **Payment method**.

The screenshot shows the 'Members' page interface with filters. A red box highlights the 'Quick Find' search bar and 'Search' button. Below this are filter options for Status (Current, Deceased, Lapsed, Resigned), Poll (No TAM, Negate poll), Class (Individual), and Payment type (Cheque). Red arrows point to the following elements:

- B**: Points to the Status filter section.
- C**: Points to the Poll dropdown menu.
- D**: Points to the Class dropdown menu.
- E**: Points to the Payment type dropdown menu.

The **Quick Find** box may be used to search quickly for full or partial matches in any of the following fields: Member's Name, 'Known as', Street, Town, Postcode, Telephone or Membership Number. Enter the text or number you want to match and press **Search**.

Select	No	Name	Address	Telep
		F		
<input type="checkbox"/>	1152	Penny Farthing	1 Weylea Avenue, Demoton, DM4 7YN	0123 00
		M		
<input type="checkbox"/>	1018	Paul McCartney	60 Penny Lane, Demoton, DM10 6HY	0123 65

*Note: If the **include criteria below** box [G] is ticked, the search will only find members that meet the criteria defined by the [B], [C], [D] and [E] selections.*

If the box is left unticked, the search will include all members.

When you have finished searching, press **Cancel Search** [H] to return to normal operation.

c) Selecting Members from the Membership List

To select one or more members prior to performing one of the operations described in section (d) below, tick the boxes in the left hand column next to each member's name.

Or click **Select** at the top or bottom of the column, followed by either:

- **Select All** for all displayed members
- **Email only** for only members with email
- **Without email** for only members without email

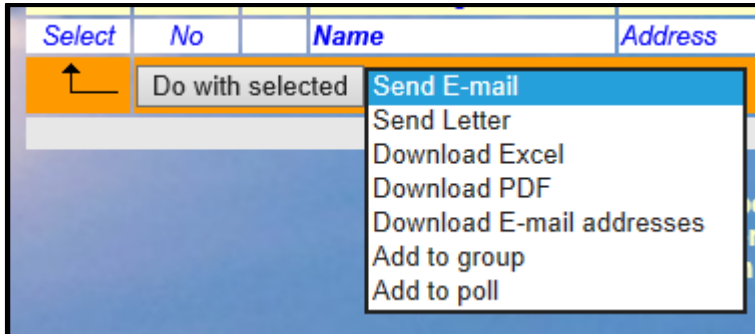
Select	No	Name
<input type="checkbox"/>	542	
<input type="checkbox"/>	342	

Select All
 Clear All
 E-mail only
 Without E-mail

d) Operations with selected Members

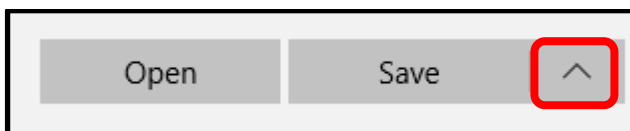
After selecting one or more members as described above, the following operations may be available, depending on the access level that you have been given.

Choose one of the options from the drop-down list below the table before pressing the **Do with selected** button:-



- **Send email:** opens a form on which to compose an email (see 6.1)
- **Send letter:** opens a form on which to compose a letter (see 6.2)
- **Download Excel:** generates an Excel file containing members' addresses, email addresses, phone numbers, etc.
- **Download PDF:** generates a pdf document containing members' addresses
- **Download e-mail addresses:** generates an Excel file containing email addresses
- **Add to group:** presents a list of groups that members can be added to
- **Add to poll:** presents a list of polls that members can be added to

When downloading a file, you will be given the choice of **Opening** the file onscreen or **Saving** the file in your default download location. Clicking the arrow next to **Save** gives the option of doing a **Save-as** to a specified location.



See the Appendix for examples of typical downloads.

e) Appendix: Typical Downloads

Excel download

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	U3A Doc Team Demoton U3A Members														
2	Status: Current ;														
3															
4	No	Title	Initi	Forename	Surname	Address 1	Address 2	Address 3	Town	Postcode	Telephone	Mobile	E-mail	Class	Status
5	1001	Mr	B	Brian	Aardatt	1 High Street			Demoton	DM12 7RA	0123 369 2154	07070 786545	aardatt@gmail.com	Individual	Current
6	1002	Mr	B	Brian	Aardbatt	29 High Street			Demoton	DM12 7RA	0123 555 2589		aardbatt@gmail.com	Individual	Current
7	1003	Mr	F	Fred	Aardcatt	12 High Street			Demoton	DM12 7RA		07070 987987	aardcatt@gmail.com	Individual	Current
8	1004	Mr	A	Alan	Abbey	72 Tanning Ave			Demoton	DM5 4TS	0123 827 2541	07070 330963	abbey@gmail.com	Individual	Current
9	1005	Ms	P	Patricia	Abrahams	1 High Street			Demoton	DM12 7RA	0123 369 2154		abrahams@gmail.com	Individual	Current

PDF download

U3A Doc Team Demoton U3A															
Members 17th March 2019															
Status: Current ;															
1001	Brian	Aardatt				1 High Street, Demoton, DM12 7RA								Individual	Current
1002	Brian	Aardbatt				29 High Street, Demoton, DM12 7RA								Individual	Current
1003	Fred	Aardcatt				12 High Street, Demoton, DM12 7RA								Individual	Current
1004	Alan	Abbey				72 Tanning Ave, Demoton, DM5 4TS								Individual	Current
1005	Patricia	Abrahams				1 High Street, Demoton, DM12 7RA								Individual	Current

Email Addresses download

	A	B	C	
1	E-mail	Forename	Surname	
2	aardatt@gmail.com	Brian	Aardatt	
3	aardbatt@gmail.com	Brian	Aardbatt	
4	aardcatt@gmail.com	Fred	Aardcatt	
5	abbey@gmail.com	Alan	Abbey	
6	abrahams@gmail.com	Patricia	Abrahams	
7	mark@hotmail.com	Mark	Adams	