

## Filtering Members and exporting to excel

We have now launched the new smart list function on the platform which gives club committees an easier and more user friendly way of managing your membership lists.

### Members List

When on the club profile select members on the right hand side then select Smart list. This will bring up the list of club members. You can change which columns are visible in this view by clicking the blue 'Actions' button in the top left corner.

Members

Legacy View **ACTIONS**

Welcome to the new Smart List functionality, you can toggle back to the old list functionality to access previous saved reports using the 'Legacy List' toggle above. This functionality will be discontinued on xx/xx/xxxx. Click here for more information on the new smart lists functionality and transitioning your reports.

Search Name FILTERS (0) 7 Records

First Name	Last Name	Date of Birth	Sex at Birth	Individual Membership Status	Individual Membership Member No.	Actions
Ty	dos	1989-07-28	Male	Current	99690546	⋮
Rachael	Hollely-Thompson	1985-10-05	Female	Current	99690545	⋮
Jenny	McLaren	1981-04-01	Female	Current	99690539	⋮

This will bring up the option to edit columns that are visible in view.

Legacy Vi

- Edit Columns
- Download Report
- Send Email

Select Columns

Search

PROFILE 17

- All  In View  In Report
- ID Contact  In View  In Report
- Age  In View  In Report
- Title  In View  In Report
- First Name  In View  In Report
- Initials  In View  In Report
- Middle Name  In View  In Report
- Last Name  In View  In Report
- Date of Birth  In View  In Report

INDIVIDUAL MEMBERSHIP 4

BRC TESTERS MEMBERSHIP

- All  In View  In Report
- BRC Testers Membership Status  In View  In Report
- BRC Testers Membership Joined Date  In View  In Report
- BRC Testers Membership Valid From  In View  In Report
- BRC Testers Membership Valid To  In View  In Report
- BRC Testers Membership Membership Type  In View  In Report
- BRC Testers Membership Auto Renewal  In View  In Report
- BRC Testers Membership Certification  In View  In Report

CANCEL DONE

The club membership valid to is their membership expiry date.

Simply select the columns you wish to be visible in view (up to a maximum of 6).

If you wish to display membership number or club expiry dates please go to the individual membership and your club membership tabs on the left hand side. Click done when you have made your selection.

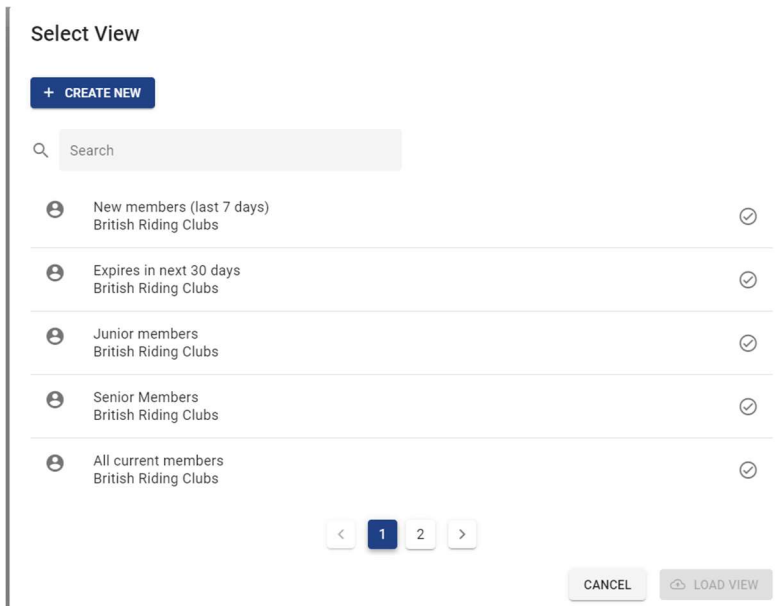
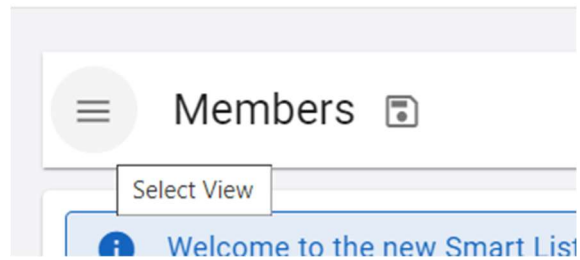
INDIVIDUAL MEMBERSHIP 4

- All  In View  In Report
- Individual Membership Status  In View  In Report
- Individual Membership Member No.  In View  In Report
- Individual Membership Membership Type  In View  In Report
- Individual Membership Primary Club  In View  In Report
- Individual Membership Club(s)  In View  In Report

### Filtering the list

Once you are happy with the headings on your current view you can start filtering the list to bring up particular groups of interest.

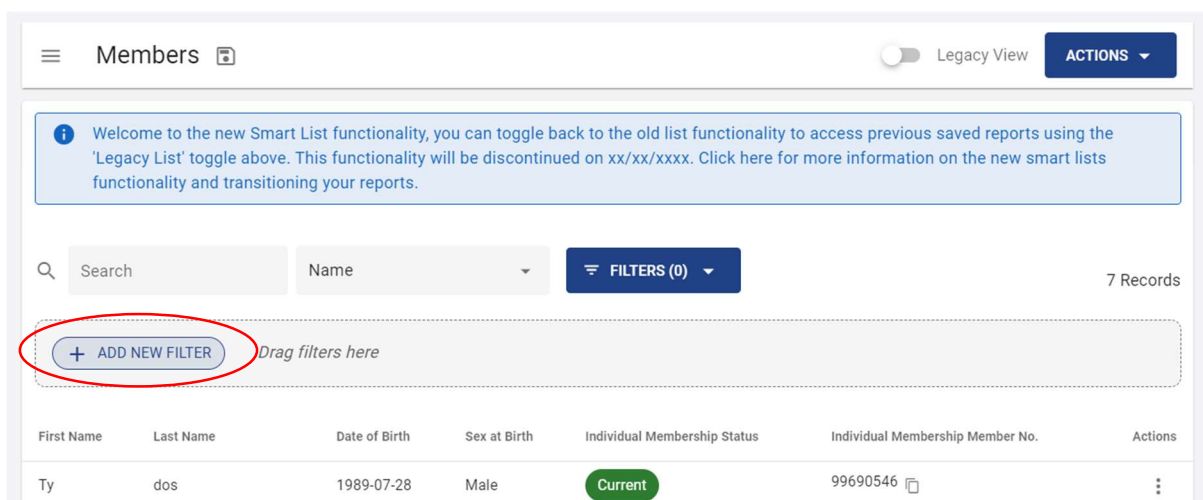
If you click the 3 lines next to the Members title this will bring up options of saved filters for the club to use.



These include:

- New members (who have joined in the last 7 days)
- Members whose club membership expires in the next 30 days
- Senior members
- Junior members
- All current members
- All lapsed members (members whose membership has run out)

If you do require any other specific filters please let us know by emailing [BRCMembership@bhs.org.uk](mailto:BRCMembership@bhs.org.uk) and we will set these up for you. Alternatively, you can use the filter tool to add your own filter.



Click add new filter to create a new filter.

Add a name for you filter so you can easily tell what it is showing.

The type you are filtering will depend on what it is you are trying to filter from. In this case we are looking at new club members so we need to filter by club membership. Then select your club membership.

When filtering in this case we want to look only at members with a valid club membership status. You can also look at specific membership types.

### Add Filter

Name \*

Type \*

Note: This name will be used to identify the filter

Select Club Membership \*

FILTERS

Status

Membership Type(s)

Show Advanced Filters  Yes  No

ADVANCED FILTERS

Status

Show Advanced Filters  Yes  No

ADVANCED FILTERS

Attribute \*

Is

Is Not

Greater Than

Greater Than Or Equal

Less Than

Less Than Or Equal

Select condition

Criteria \*

Field is required

Membership Type(s)

Use the advanced filter tool to add further criteria and then click create.

ADVANCED FILTERS

Attribute \*

Condition \*

Criteria \*


+ ADD RULE

\* indicates required field

CANCEL CREATE

This will then bring up a list of the members selected. You then have the option to add another filter with an and or or option.

To save that view hover over members at the top and click the pencil to name the view so you know what it is looking at. Then click the save button next to the view title.

Members 

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Search Name FILTERS (1) CLEAR FILTERS 2 Records

New members (last 30 days) OR + ADD NEW FILTER

AND

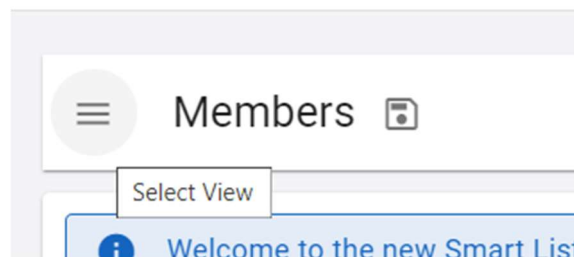
+ ADD NEW FILTER Drag filters here

First Name	Last Name	Date of Birth	Sex at Birth	Individual Membership Status	Individual Membership Member No.	Actions

Mem... 

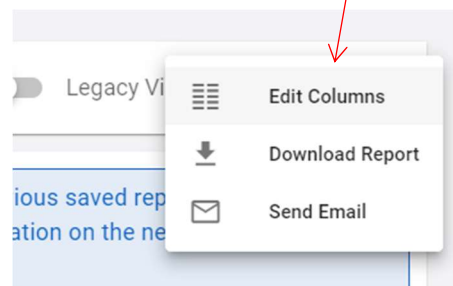
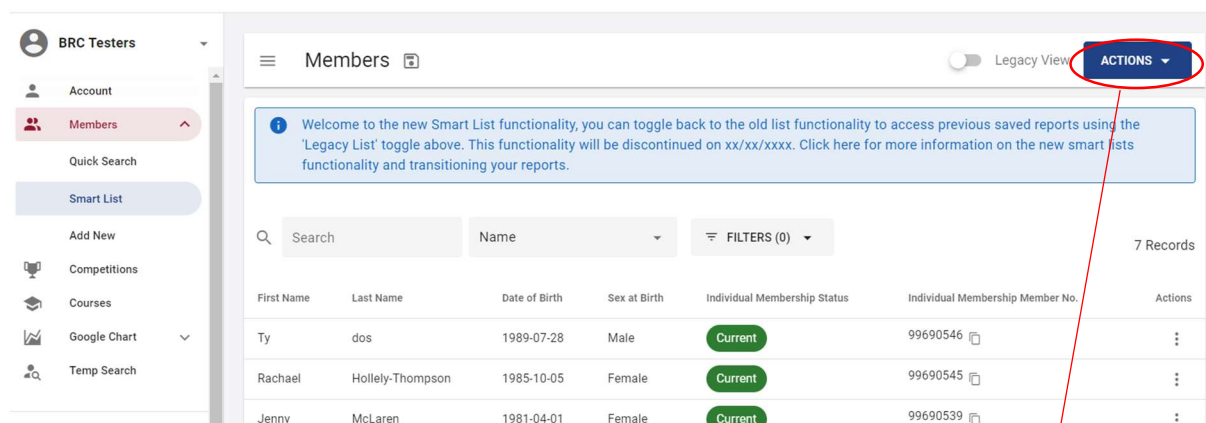
Rename

This will add the view to your list of saved views so you will be able to select it from the 3 lines next to the view title in the top left corner.

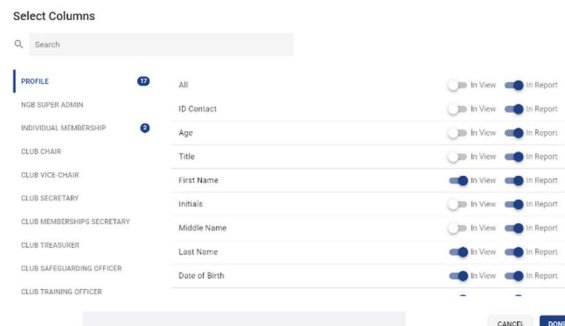


### Downloading a report to excel

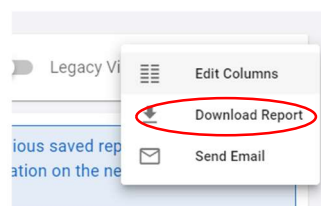
Once you have the view you want to download on your screen (this may be all members or a filtered list).



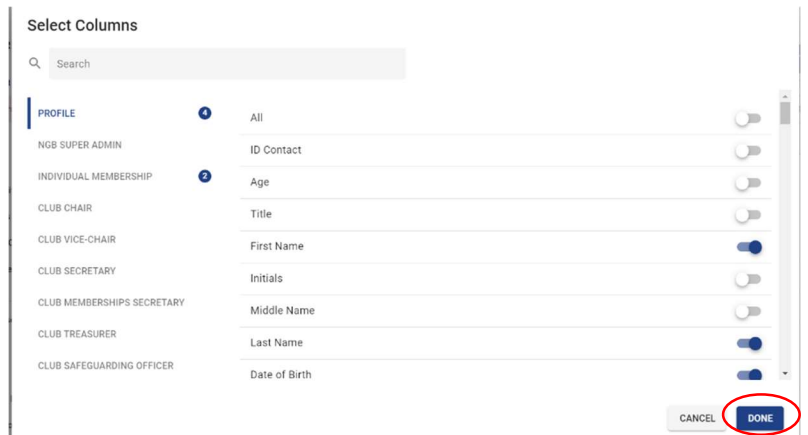
Edit columns to edit what columns will be visible on the report you pull off. There is no limit to the number of columns available on a report.



Once you are happy with the columns selected click done. Go back into actions and click Download Report.



Check the columns are correct.



Click done.

Add a title then click download.



This will then go into queued reports as pending. Once it is ready to download you can click download and it will go into your downloads folder.

