

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.



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.

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Members 🗊

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

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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.

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



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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



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.

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Downloading a report to excel

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