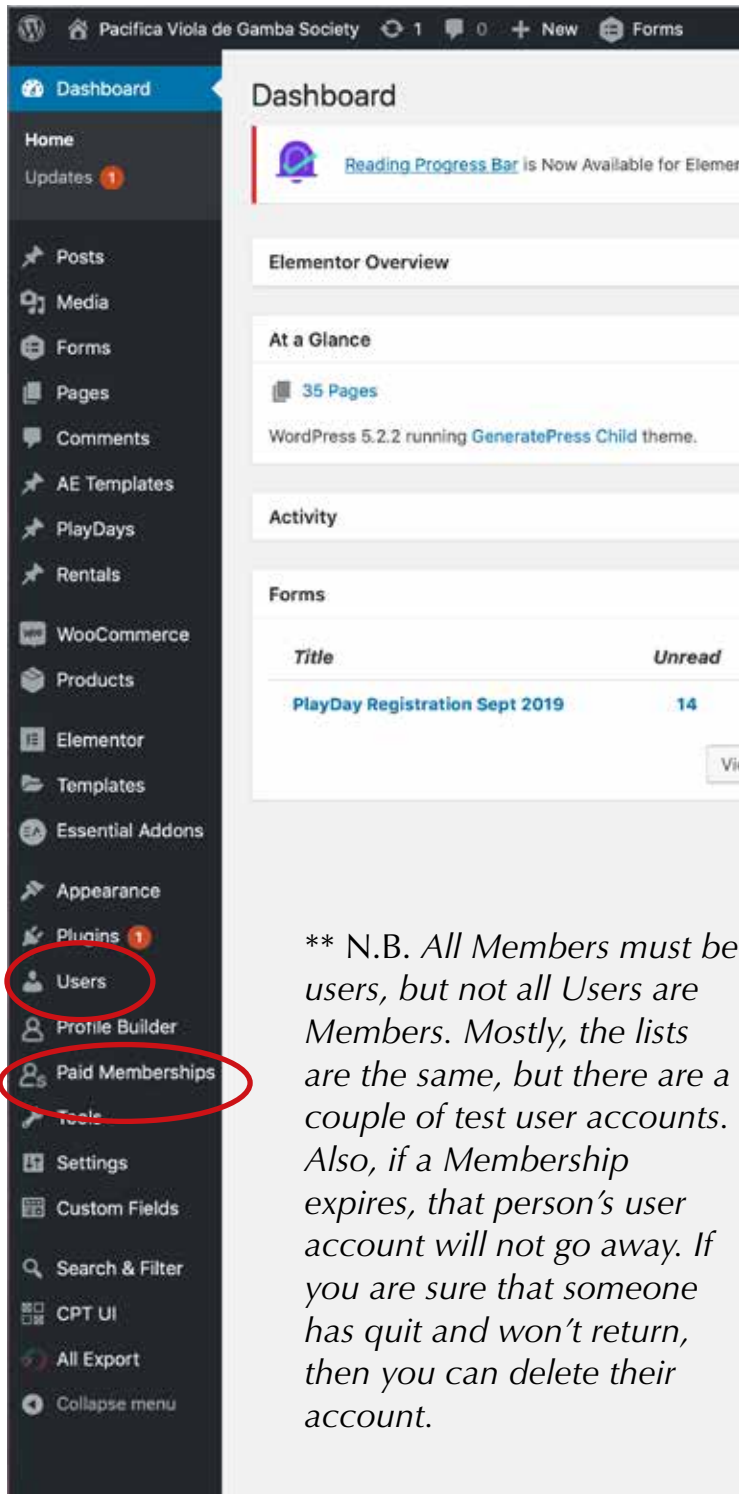


EDITING AND/OR ADDING MEMBERSHIP INFO FOR PV MEMBERS

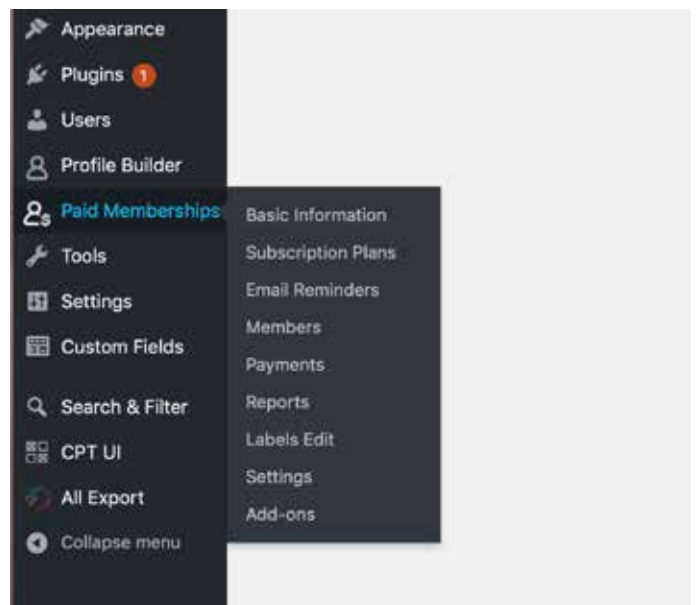
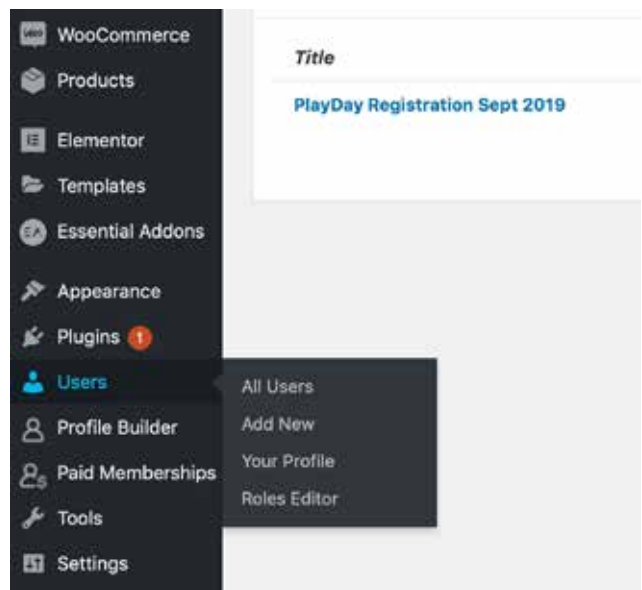
It's important to remember that some functions of the Membership record-keeping are maintained in the USERS area, and some in the MEMBERSHIPS area.

Once you get to the dashboard (after logging in, go to pacificaviols.org/wp-admin), you'll see both of these on the left-hand sidebar.

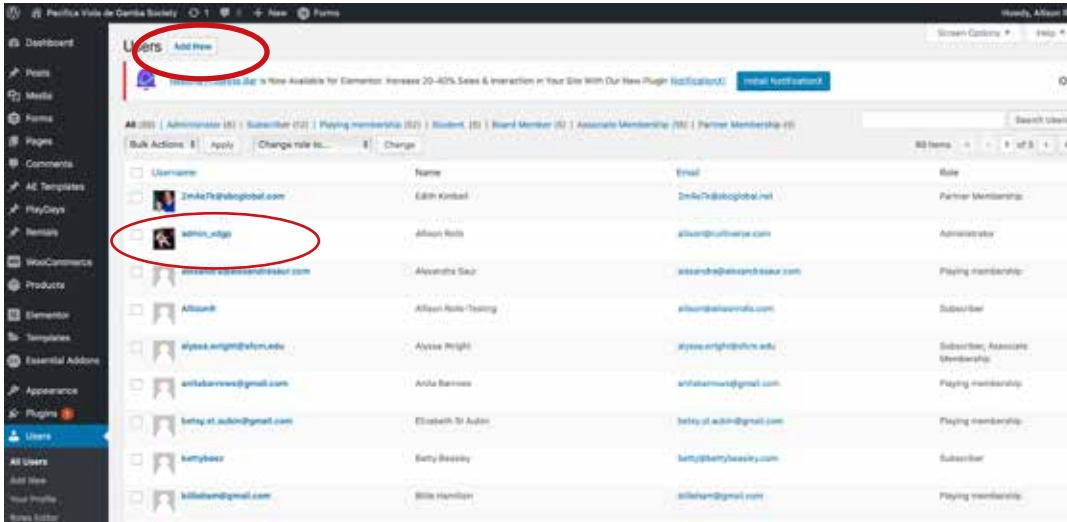


*** N.B. All Members must be users, but not all Users are Members. Mostly, the lists are the same, but there are a couple of test user accounts. Also, if a Membership expires, that person's user account will not go away. If you are sure that someone has quit and won't return, then you can delete their account.*

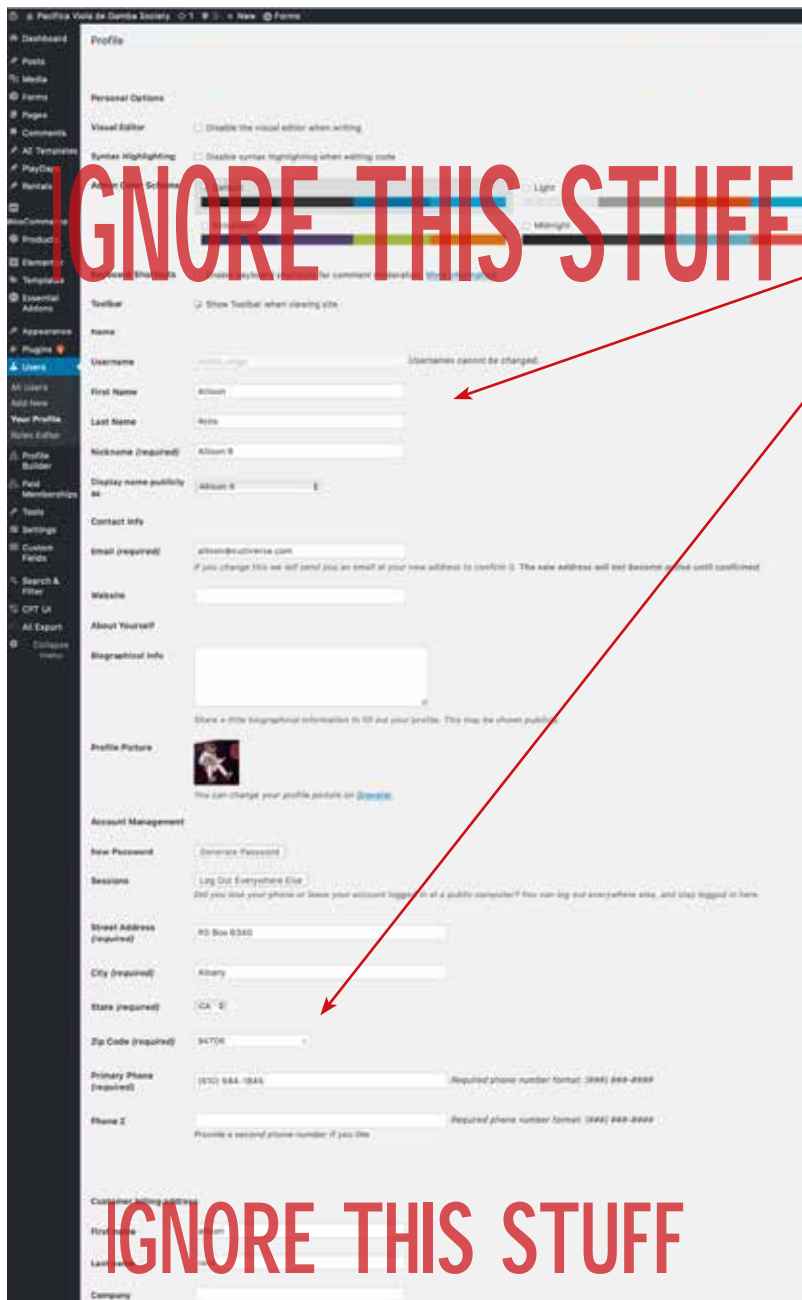
Rolling over (or clicking on) the menu items will cause the submenus to pop up. Choosing "All Users" will take you to the list of all the Users. Likewise, clicking on Members will take you to the Members List **



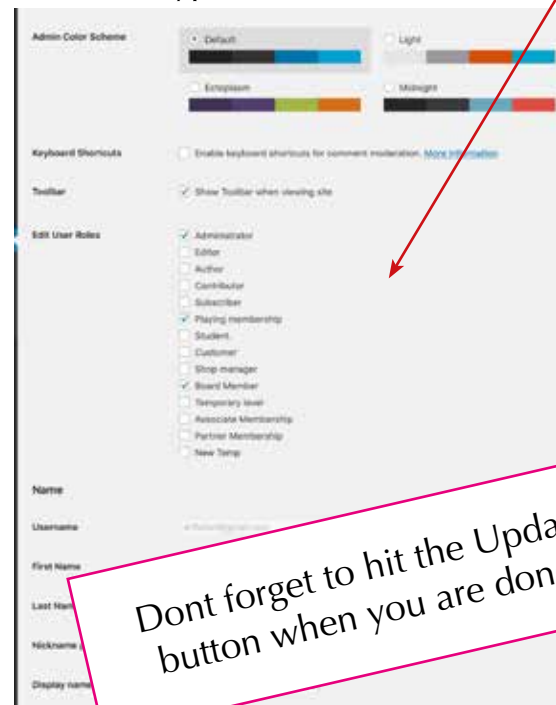
Information that is updated in the USER area is mostly the **contact info**. Their **User Type** is also designated here.



Choose the user you want to edit by double-clicking the Username (or you can hover over the username to bring up other options: Edit/Delete/View) To create a new User, click the "Add New" button.

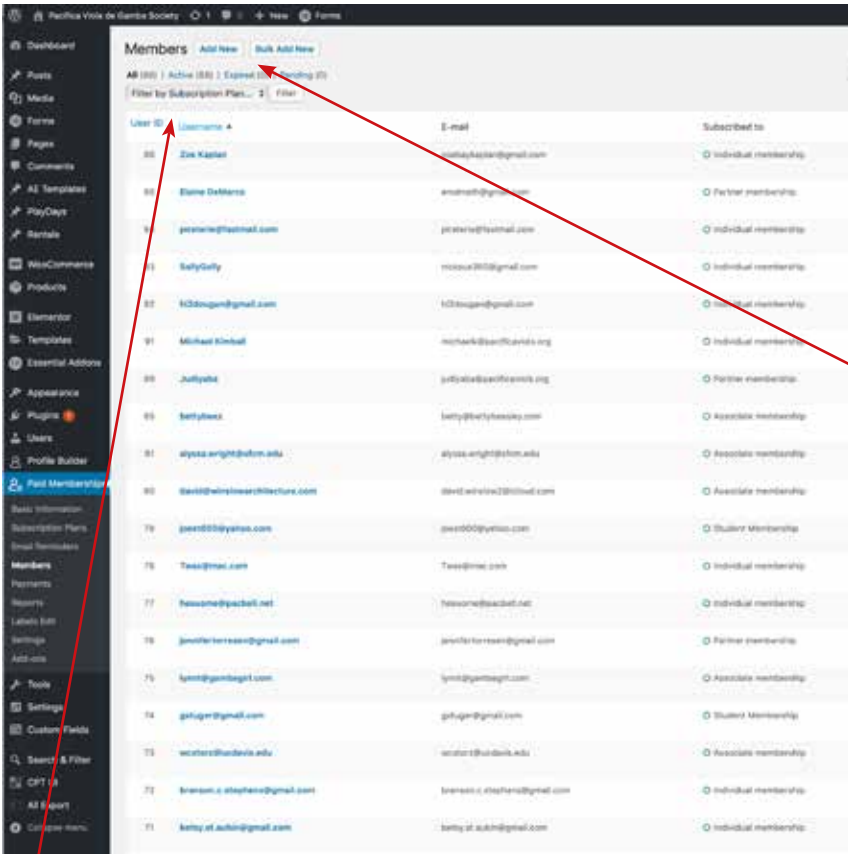


Much of this you can ignore. The important parts are the First name, last name, email address, and street address elements, including zip code. If you need to change someone's password, you can do it on this screen, as well as on their Member profile. All users (except me) have a user role designation here: Notice that there are some unused roles, and admins and board members are designated here, but in general these should match the Member type.



Dont forget to hit the Update button when you are done!

Editing Membership Info



The screenshot shows the 'Members' page in a WordPress dashboard. At the top, there are buttons for 'Add New' and 'Bulk Add New'. Below these is a filter dropdown menu currently set to 'All (88) | Active (88) | Expired | Pending (7)'. A table lists members with columns for 'User ID', 'Username', 'Email', and 'Subscribed to'. The 'Subscribed to' column contains membership types like 'Individual membership', 'Partner membership', and 'Associate membership'. A red arrow points from the 'Filter' dropdown to the 'Add New' button.

The Member list shows you each member's username, email address (in most cases, it's the same, though you see here that some have usernames that are different) and their Member Type (not to be confused with their User Role!)

You can add a new Member here, but **only** if they already have a **USER** account. (There's a handy drop down menu of users who are not already members that you'll see when you click on "Add New")

Click to edit Membership info - but be careful! Manually changing these items won't necessarily update their User info - esp. their User role.

You can use the "Filter" dropdown to list all the members of one type of member, or you can use the Search box (not shown) to find an individual member.

Edit Member

Username

Memberships

Subscription Plan	Start Date	Expiration date	Status	
Individual membership	2019-07-08	2020-08-31	Active	<input type="button" value="Edit"/>

This area will show options to change their membership plan, start and expiration dates, and their "status" - i.e. active, expired, cancelled or pending. Unpaid renewals are "pending."

Recent Payments

This section shows info about their payments: dates, what level they joined at, how paid, and lots of details.

Subscription	Amount	Date	Status	Actions
Individual membership	\$45	August 16, 2019 17:15:59	Completed	View Details