



Members Training Manual

1. Members icon
2. Member List
3. Filter through your list via any of the filters on the filter list
4. Select checkboxes next to member names you wish to bulk edit/update
5. Select from the 'With Selected' List to the right of your Member List
6. Bulk Email, Text, Export, Assign to or remove from Ministry, *Update members, or Remove members
 - a. *When selecting, 'Update Members,' choose the field you wish to update, followed by the 'Update' button
7. Click on the 'Reset' button before starting a new filter
8. Click on the 'Add New Member' button and enter the member's first & last name
9. Select additional information from the fields on the right, fill out the information, and 'save'
10. To add or change member fields, go to the Member Fields area
11. Add a New Section, change the main title of a Section, or add any custom Fields from any of these Members Fields choices on the left by clicking and dragging them into the space you desire
12. Make sure to click on the 'Save Changes' button when you are finished
13. Within a Member's Profile, view Basic information, Contact information, Family connections, etc.
14. Edit any section at any time
15. Go into a family member's profile from the Family section within a member profile
16. To add a photo, click on 'upload photo,' select a photo, crop, and 'set as profile'
17. View your member's Attendance, Add Notes, Assign or Remove them from ministries, or Delete