









## Julep: Memberships and Membership Status


Memberships are useful in organizing your **People** records and categorizing them in easily searchable groups. You can create memberships and membership statuses with renewal dates and customize them according to your needs.

### Creating and Editing Memberships


- To create/edit a **Membership**, click on the **People Dashboard**, then the **Settings**  button on the top right **Dashboard Navigation Bar** and open the **Membership** tab. A list of existing Memberships will appear along with the total number.
- Search for Membership codes using the **Search Bar** along the top.
- Scroll through the pages of your list of memberships using the left and right arrows or by selecting the desired page at the bottom. You can also control the number of memberships or items listed per page using the drop-down menu (5, 10, or 20 items per page).
- To view/edit a membership, click the  button to the left of the membership code, make your edits and press  .
- To delete a membership, click the  button and choose **Yes** when asked “Are you sure to delete?” to delete the membership permanently or **No** to cancel.
- To create new membership, click  and a new **Membership Code** window will appear.

Add Membership 

Membership Code





- Enter a **Membership Code** of up to 30 characters that will help you remember its significance (Ex: Inner Circle, Life Member, Round Table, etc.) and then click  .
- Click **Cancel** at any time to exit the new membership window and not save the information.

### Creating Membership Statuses

To create/edit a **Membership Status**, click on the **People** menu, then the **Settings**  button on the top right **Dashboard Navigation Bar** and open the **Membership Status** tab. A list of existing membership statuses will appear along with the total number.



## Julep: Memberships and Membership Status

- Search for membership statuses using the Search Bar along the top.
- Scroll through the pages of your list of membership statuses using the left and right arrows or by selecting the desired page at the bottom. You can also control the number of membership statuses or items listed per page using the drop-down menu (5, 10, or 20 items per page).
- To view/edit a membership status, click the  button to the left of the membership code, make your edits and press .
- To delete a membership status, click the  button and choose Yes when asked “Are you sure to delete?” to delete the membership status permanently or No to cancel.
- To create new membership status, click  and a new Membership Status window will appear.

Add Membership Status



Membership Status
<input type="text"/>
Membership Code
ROUND TABLE

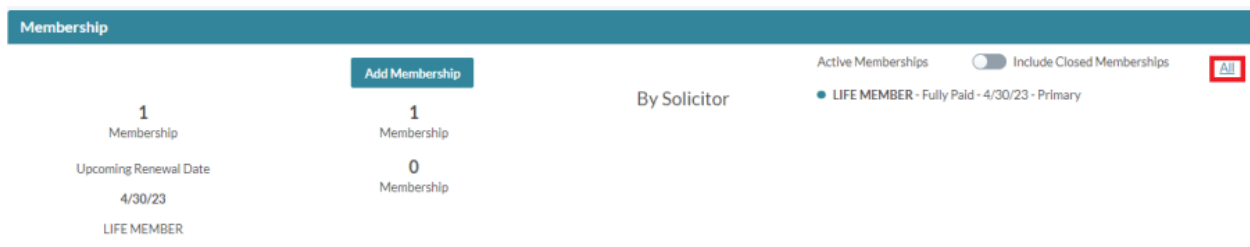
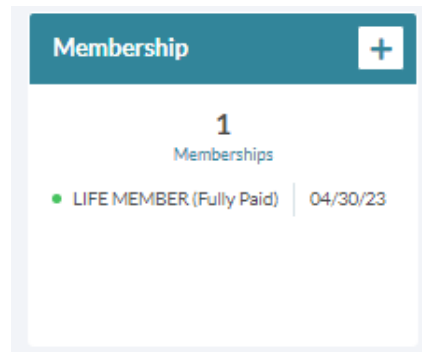
- In this new **Membership Status** window, you’ll want to choose the **Membership** that you are creating the new status for using the drop-down menu, create the status name which can be up to 50 characters long (Ex: “Inactive”, “Active”, “Lapsed”, “Expired”, “Membership Level 1”, etc.), and then click.

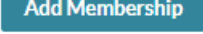

### Using Memberships in a People Record

Within a **People** record, the total number of memberships the people record belongs to and memberships that have upcoming renewal dates appear under the **Memberships Panel** in the profile. If you click on the panel, an overview of the memberships will appear. You can click the **All** in the top right corner of the panel summary to see a list of all active memberships that the profile is a part of.



## Julep: Memberships and Membership Status



- To add a new membership to a people record, click . A new **Membership** window will open where you can choose the **Membership** and **Membership Status** in the drop-down menu. You can also add a **Solicitor**, **Renewal Date**, and/or enable the **Primary Membership**, **Override**, or **Closed** toggles then click .

### Membership


Mr. Joseph M. Banks, Sr. (PID: 2727334) Add a new Membership

Membership   Primary Membership

Status   Override

Closed



Solicitor

Renewal Date  

- You may click  anytime to exit the window.

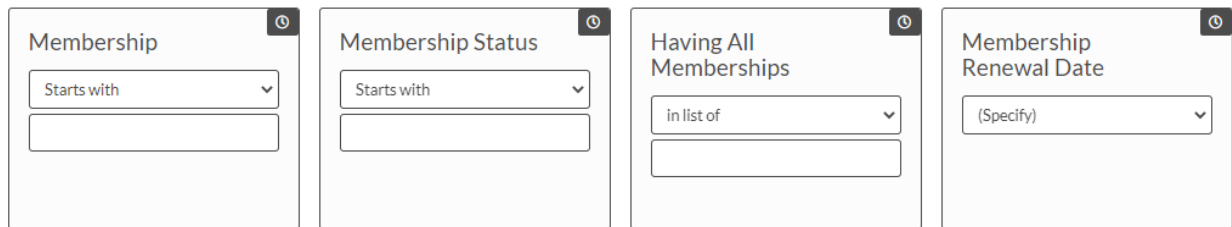


## Julep: Memberships and Membership Status

- You may click  to open an existing membership and edit the info or  to delete a membership from a profile.

### Searching with Memberships and Membership Statuses

When searching for People records, you may search for all records within a specific Membership, Membership Status, and/or with a Membership Renewal Date under the Group section.



The image shows four search filter panels, each with a close button in the top right corner:

- Membership:** Contains a dropdown menu labeled "Starts with" and an empty text input field below it.
- Membership Status:** Contains a dropdown menu labeled "Starts with" and an empty text input field below it.
- Having All Memberships:** Contains a dropdown menu labeled "in list of" and an empty text input field below it.
- Membership Renewal Date:** Contains a dropdown menu labeled "(Specify)" and an empty text input field below it.

\*\*For more detailed information on searching, please see the [Julep - People Search](#) guide on the HelpDesk.