

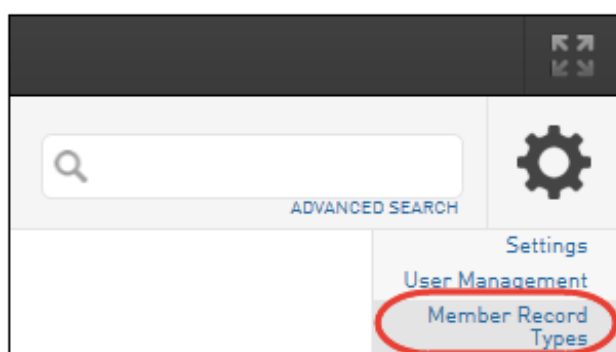
Setting up Member Record Types

Last Modified on 03/12/2016 12:47 pm AEDT



When first obtaining access to the Membership Database, you will need to set up your Clubs or Class Associations Member Record Types. Member Record Types are applicable for multiple Seasons, so ensure you carefully think about which Member Record Types you wish to add to the System. For Clubs - Member Record Types at Club level will need to be mapped into the appropriate Parent (State Member Record Type) For Class Associations - Member Record Types at Association level will need to be mapped into the appropriate Parent (State Member Record Type) To set up Member Record Types, complete the following steps:

1. From the main dashboard page, click the cog on the right hand side and select 'Member Record Types'.



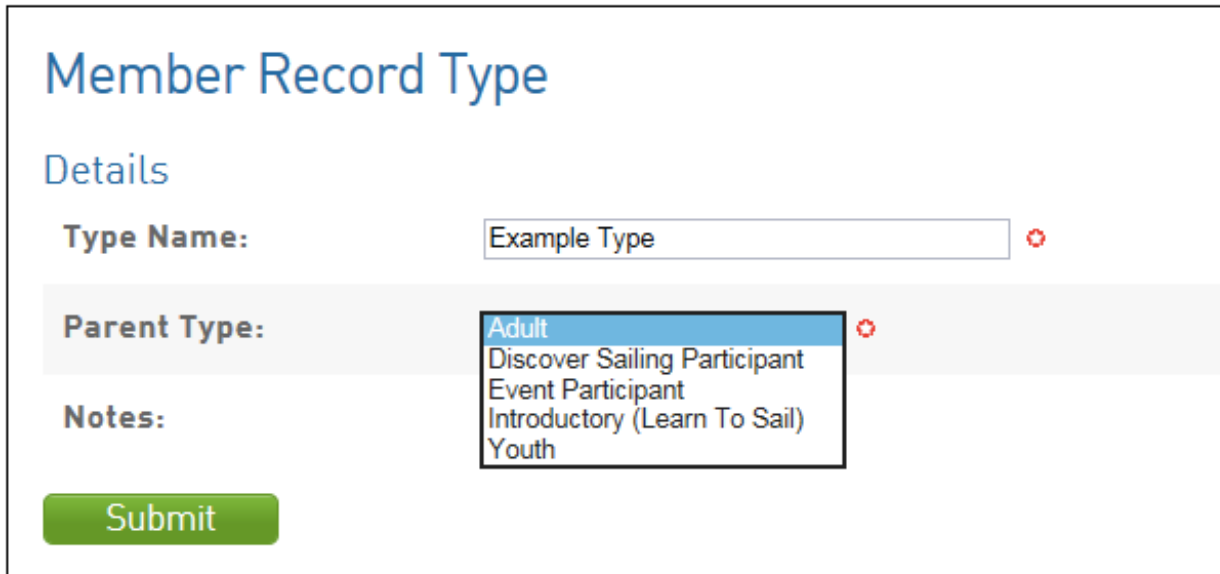
2. From the Member Record Types page, click the 'Add' button.

Member Record Types

Member Record Type	Parent Member Record Type	Parent Level	Parent Entity ID	Notes
Adult	Adult	20	7430	
Youth	Youth	20	7430	
Introductory (Learn To Sail)	Introductory (Learn To Sail)	20	7430	

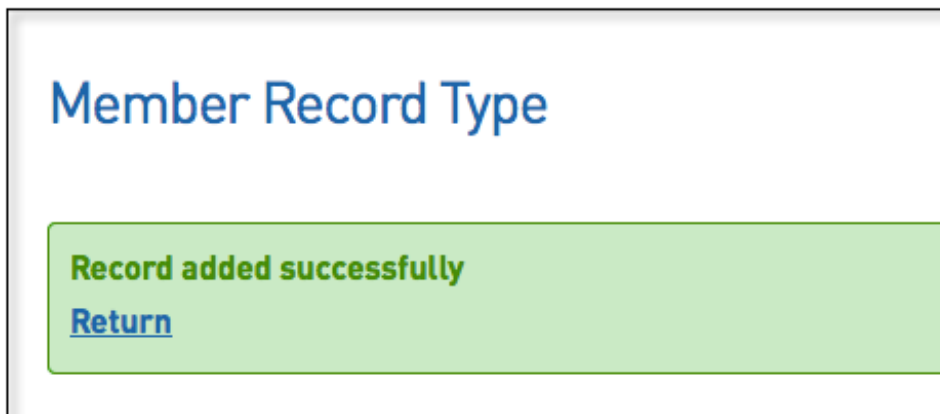
The 'Add' button in the top right corner of the table is circled in red.

3. On the next page, enter in the name of the Member Record Type that you wish to create. Be sure to link it to an appropriate Parent Type at State level.



The screenshot shows a web form titled "Member Record Type" with a "Details" section. It contains three main fields: "Type Name" with a text input containing "Example Type"; "Parent Type" with a dropdown menu showing options: "Adult", "Discover Sailing Participant", "Event Participant", "Introductory (Learn To Sail)", and "Youth"; and "Notes" which is currently empty. A green "Submit" button is located at the bottom left of the form area.

4. Click 'Submit'. The below screen will appear confirming the new Member Record Type has been set up.



The screenshot shows a confirmation screen titled "Member Record Type". A green banner at the top of the content area contains the text "Record added successfully" and a blue link labeled "Return".

Note: Member Record Types can be renamed but not deleted after they have been created.

For further assistance please contact Online Services:

onlineservices@sailing.org.au

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