

Hello Club guide.

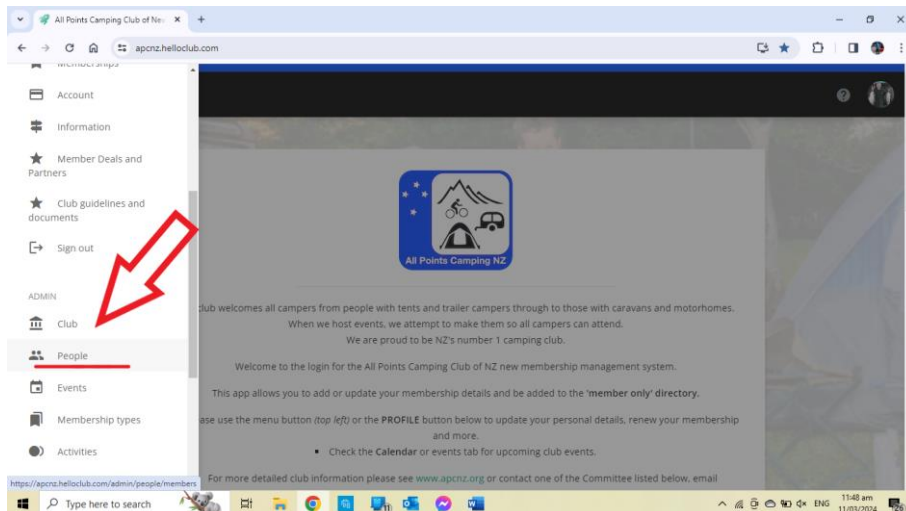
Member search & Email

As committee or regional reps, you have access to extra Hello club (HC) menus.


NOTE: this is for a laptop or computer only, phone screens work differently.

You can check for new members in your region, email members by region or name. Searching for people is easy, but there is a but. The name you search for **MUST** be identical as in the HC records.

To get to the people/members file use the menu icon ☰ at the top left of the home screen and scroll down to people in the ADMIN section. Click people. This will open the full list of members.



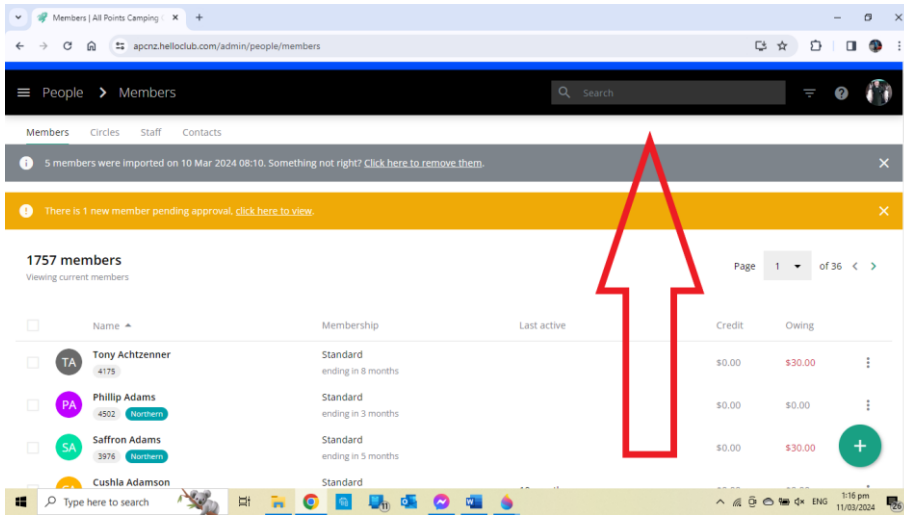
Once in the member file you have options.

1. Search Box
2. Filter 
3. Action (Green + tab)

To search for a member

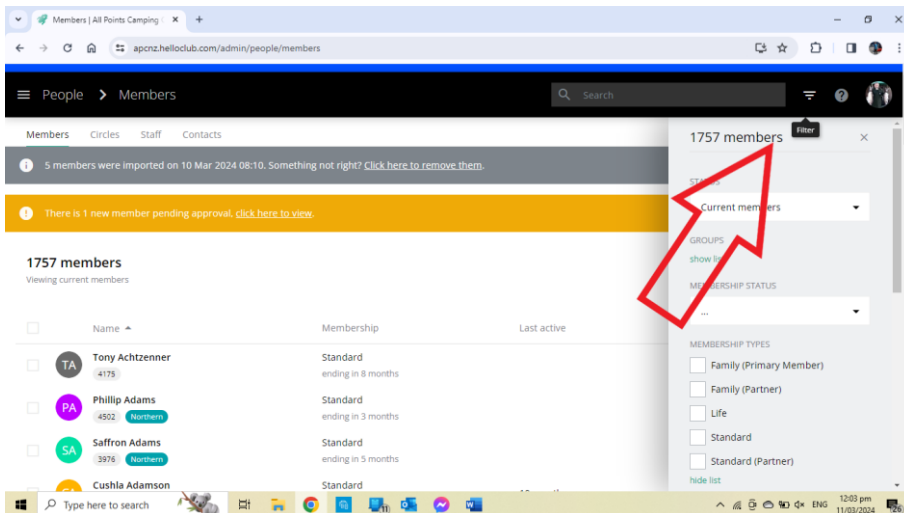
The best way is to search by surname only, i.e. for John Smith just type in Smith.

For other searches type what you are looking for. You can search by address, city, region, email address and lots more.

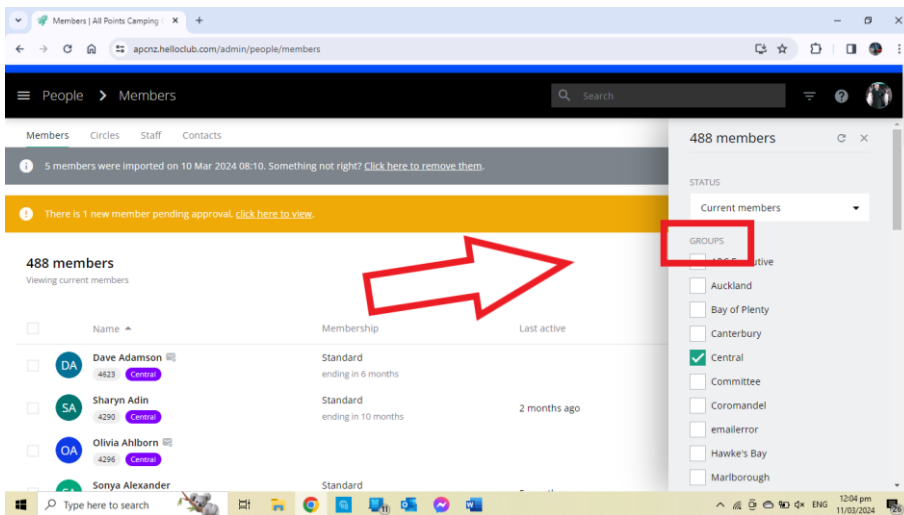
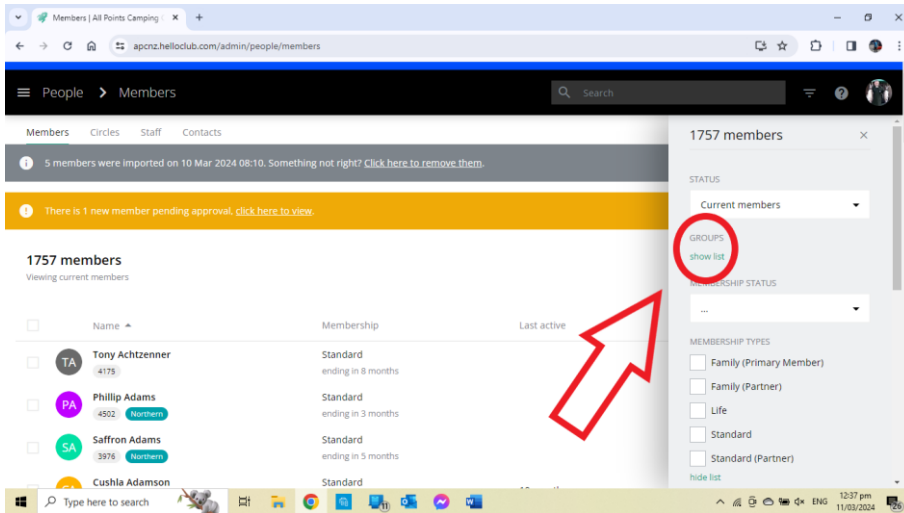


To search by region, use the FILTER tab Just to the right of the search box. This opens a large menu that filters the search field.

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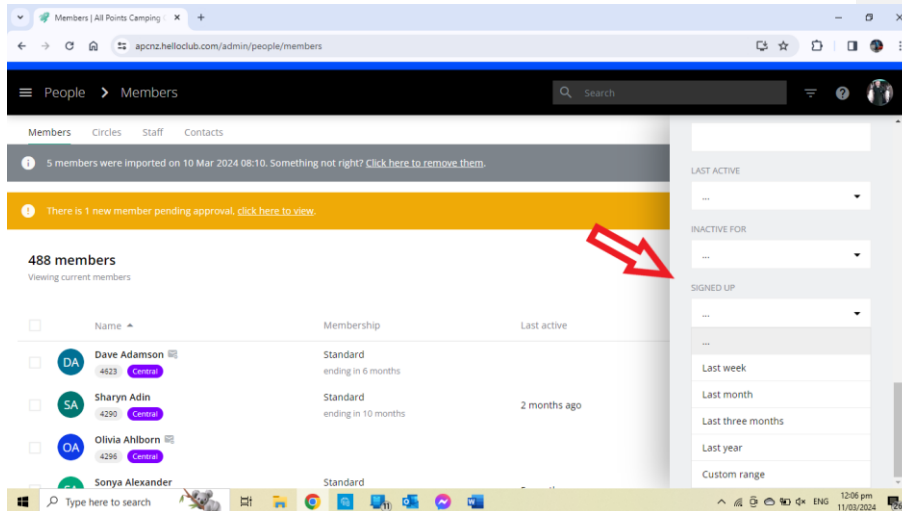


Select the words "show list" under the headings GROUPS, Then select the group or groups you want.



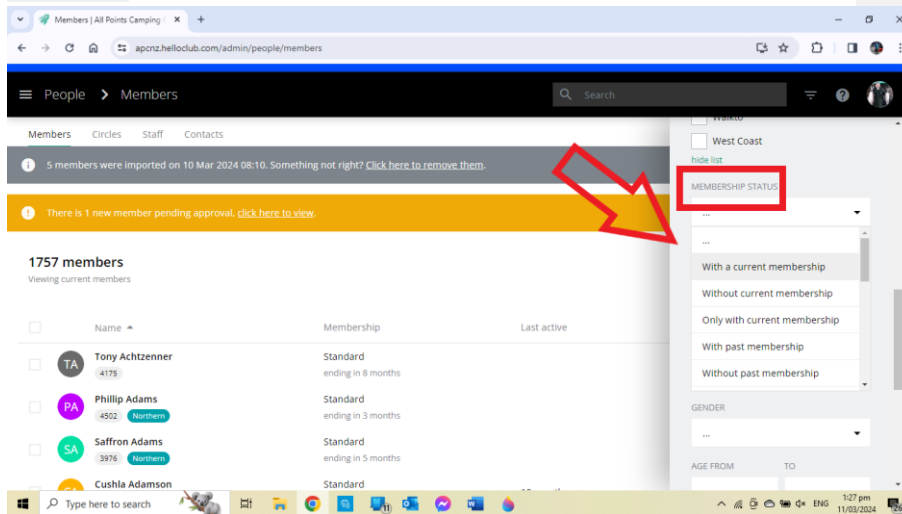
At one click you now have the members in that region.

To see who the new members are, scroll down the filter menu to "Signed up" and select a time frame. This will show the new members in your region.

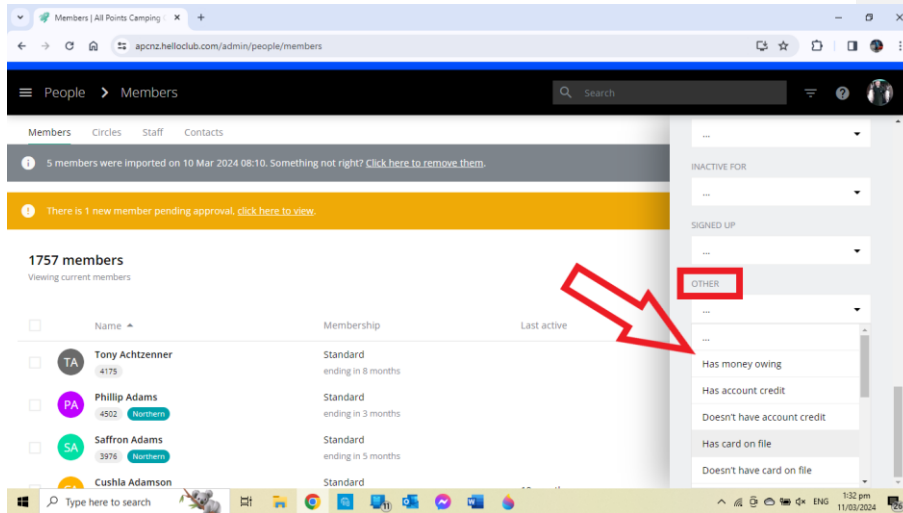


To see **lapsed members** search **MEMBERSHIP STATUS-- WITHOUT CURRENT MEMBERSHIP.**

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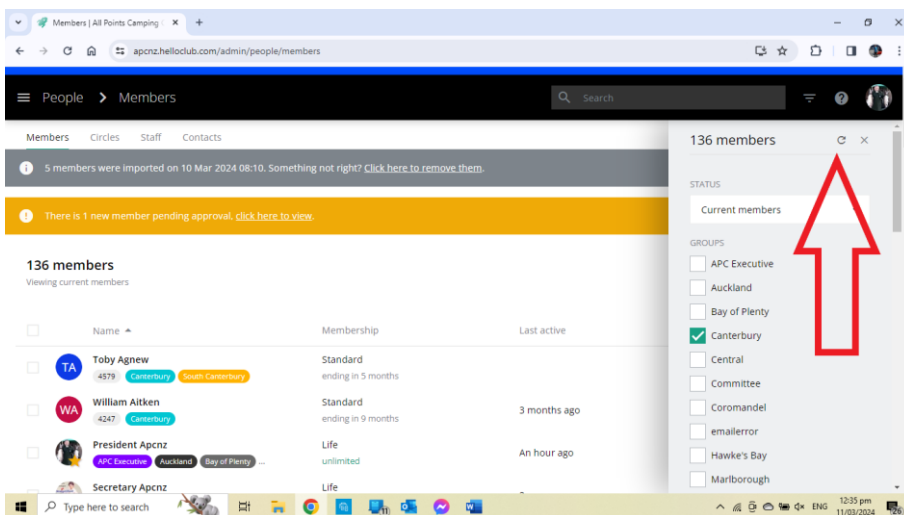
There are some lapsed members who have been renewed and invoiced. Harder to find. In the filter menu under **MEMBERSHIP STATUS--Select WITH CURRENT MEMBERSHIP** then scroll down the filter menu to **OTHER** select **HAS MONEY OWING.**



This will show these members. Note, after six months these members if not paid get ARCHIVED.

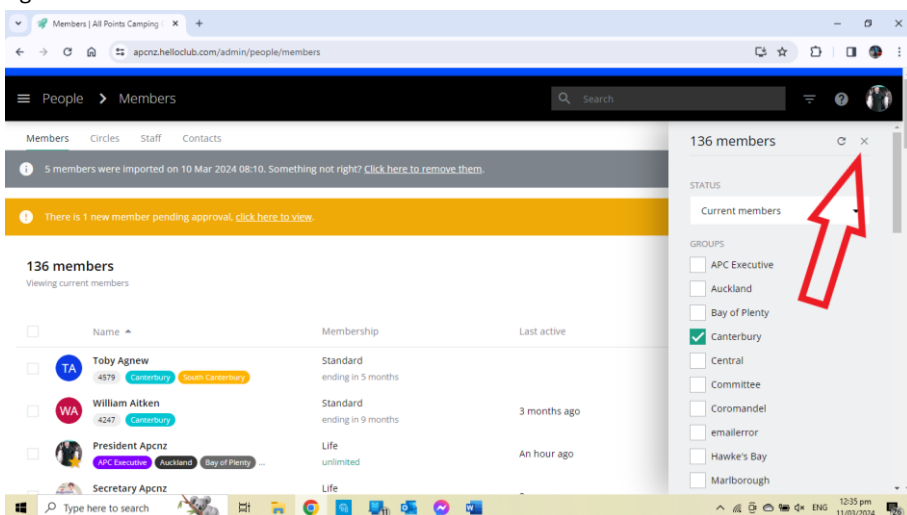
Warning: There is an extremely important feature of the FILTER, it **remembers**. If you search using the filter it STAYS in that search field. If you select **regional reps** in the filter groups, you will only have regional reps displayed. There is a reset tab at the top right (see where arrow is pointing in diagram below). You MUST reset the filter before searching for something different or you will only be searching in the **regional reps**, as above example.

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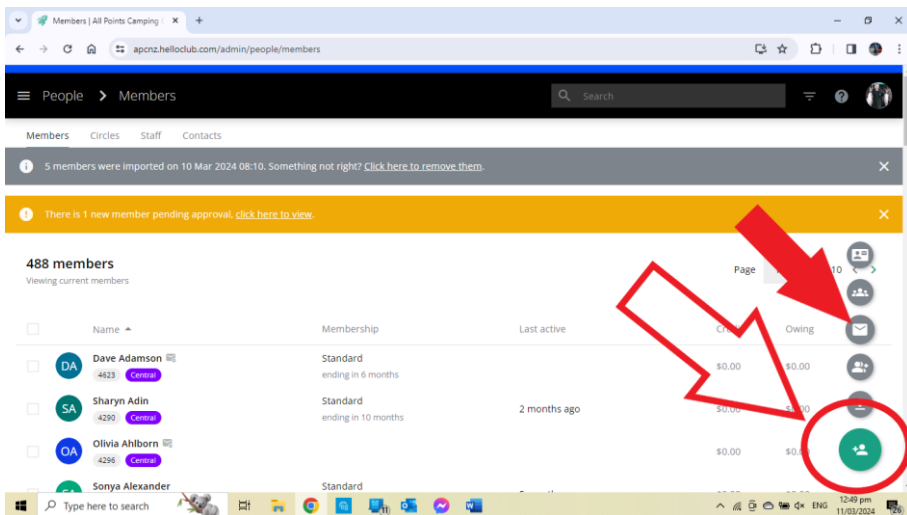


To email members by region, select the region in the filter menu as above. **GROUPS** show list select a group, example Canterbury. Then close the filter with the X at the top right next to the reset.

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You now have the Canterbury members displayed. To email go to the action button (green + Button) bottom of screen on right. DO NOT CLICK just hover, this opens the menu. If you click the green button by mistake, you will go to add a member.



Now select "email" in this new menu. This opens the send email feature. Type your email then scroll down the email window to add an attachment and reset the reply email address. If you are not in the reply email addresses let me know so you can be added.

Members | All Points Camping

apcnz.helloclub.com/admin/people/members

People > Members

Members Circles Staff Contacts

5 members were imported on 10 Mar-24

There is 1 new member pending approval

488 members
Viewing current members

Name

- DA Dave Adamson 4823 Cancel
- SA Sharyn Adin 4290 Cancel
- OA Olivia Ahiborn 4296 Cancel
- Sonya Alexander

Subject

Message

Email will be sent to 465 recipients

Please note that this email feature is meant for sending simple messages and notifications only. If you want to send out recurring or more elaborate mailings, please use one of our [newsletter integrations](#) instead.

CANCEL SEND

Page 1 of 10

Credit	Owing
\$0.00	\$0.00
\$0.00	\$0.00
\$0.00	\$0.00

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- OA Olivia Ahiborn 4296 Cancel
- Sonya Alexander

Show available replacement tags

ATTACHMENTS (max. 10 files / 20Mb)

ADD FILE

REPLY-TO ADDRESS

president@allpointscampingnz.org

Email will be sent to 465 recipients

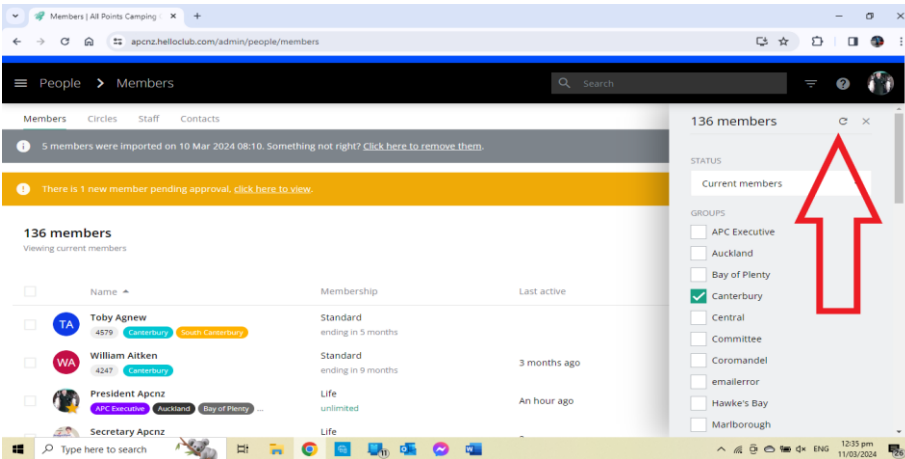
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CANCEL SEND

Page 1 of 10

Credit	Owing
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\$0.00	\$0.00
\$0.00	\$0.00

When you have finished go back to the filter and reset.



That covers how to find members and send them basic emails. Emails are text only. If you want a fancy email to go to members, create the email in another program and save it as a pdf. Attach the pdf to your email with a description of the attachment.

Please remember that ALL the information in the Hello Club portal is **CONFIDENTIAL** and not to be shared with anyone not directly involved.

I hope this helps with your role in our club. If there is anything you do not understand, need a hand with it or I haven't covered give me a call.

Wayne Ravelich
Club President
0274757420