Managing Registration Status through Mass Assign and Member Type

20 Steps [View most recent version](#)

Created by

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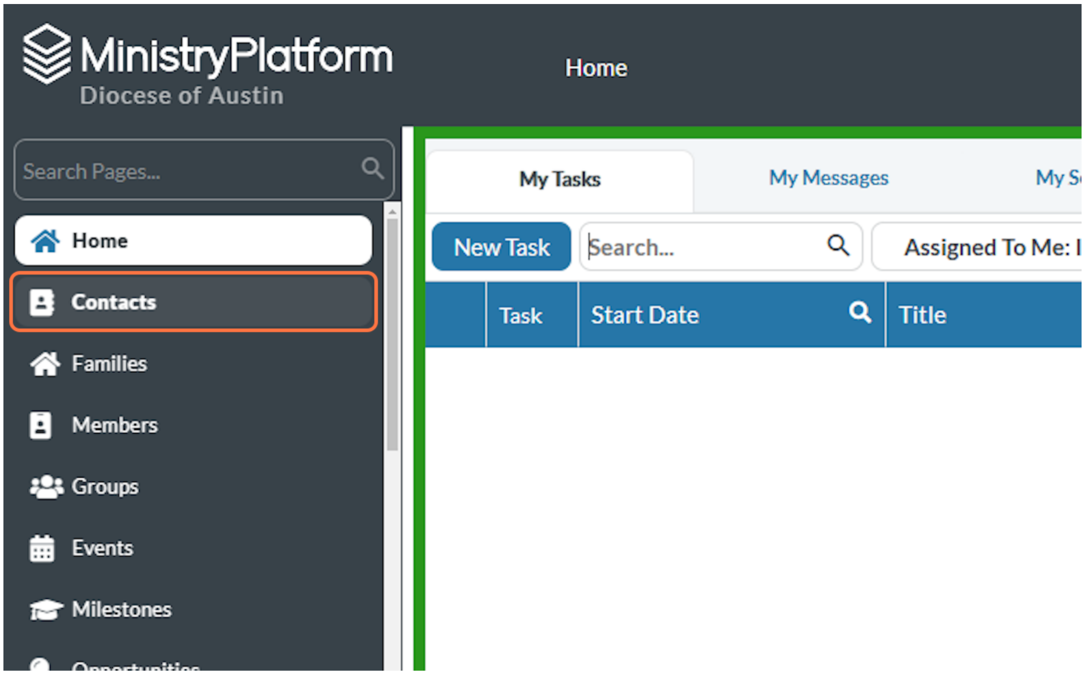
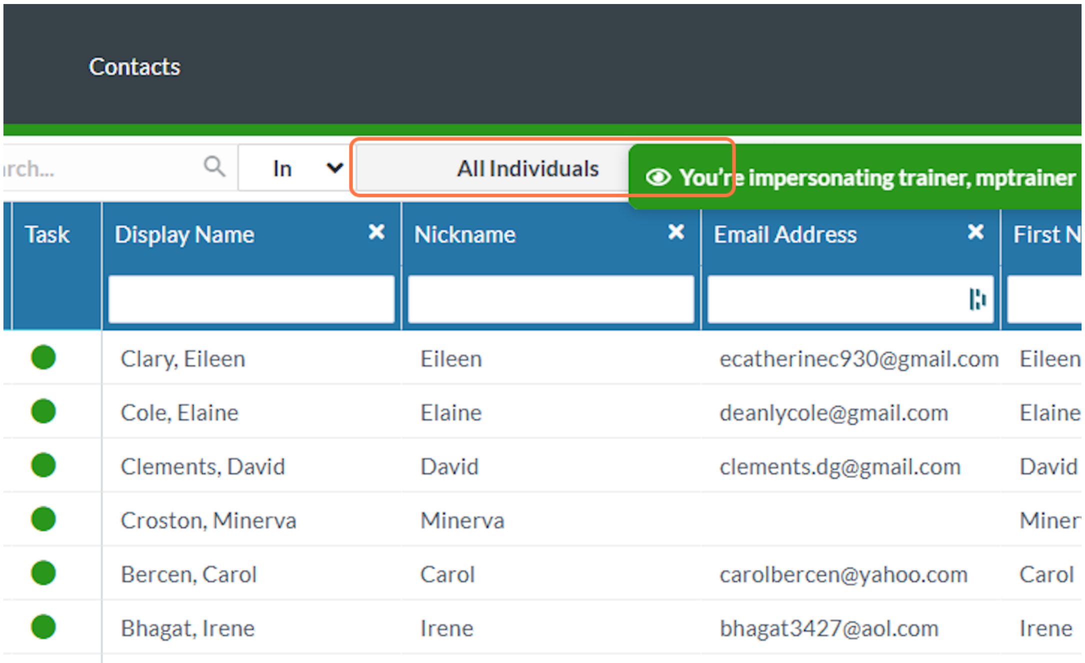
STEP 1

Click on Contacts



STEP 2

Click on view drop down

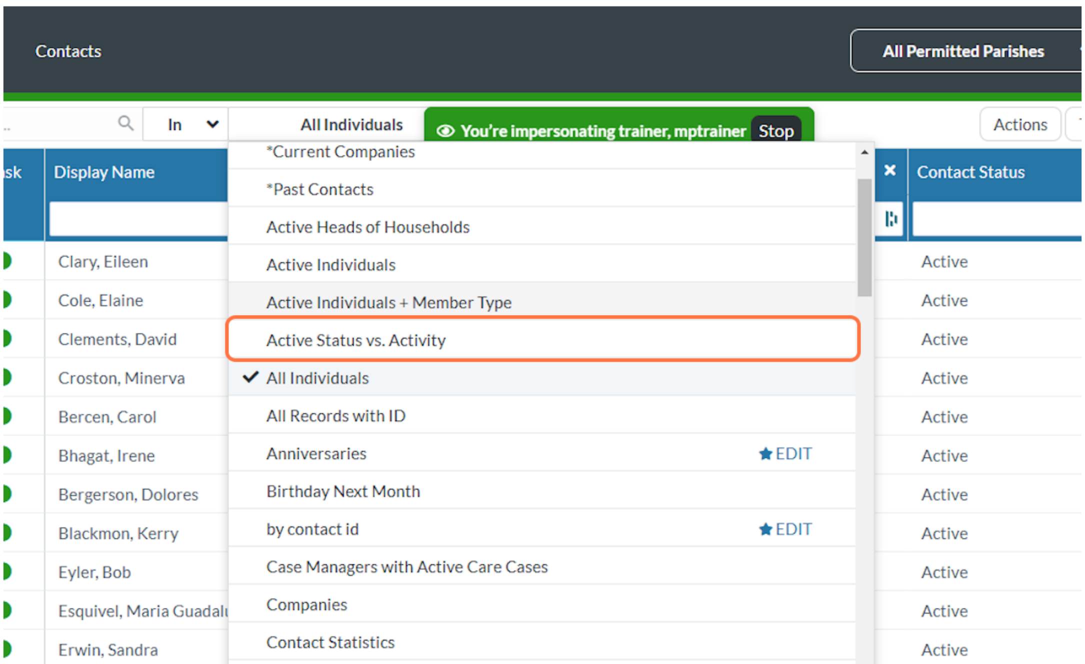


STEP 3

Click on Active Status vs. Activity

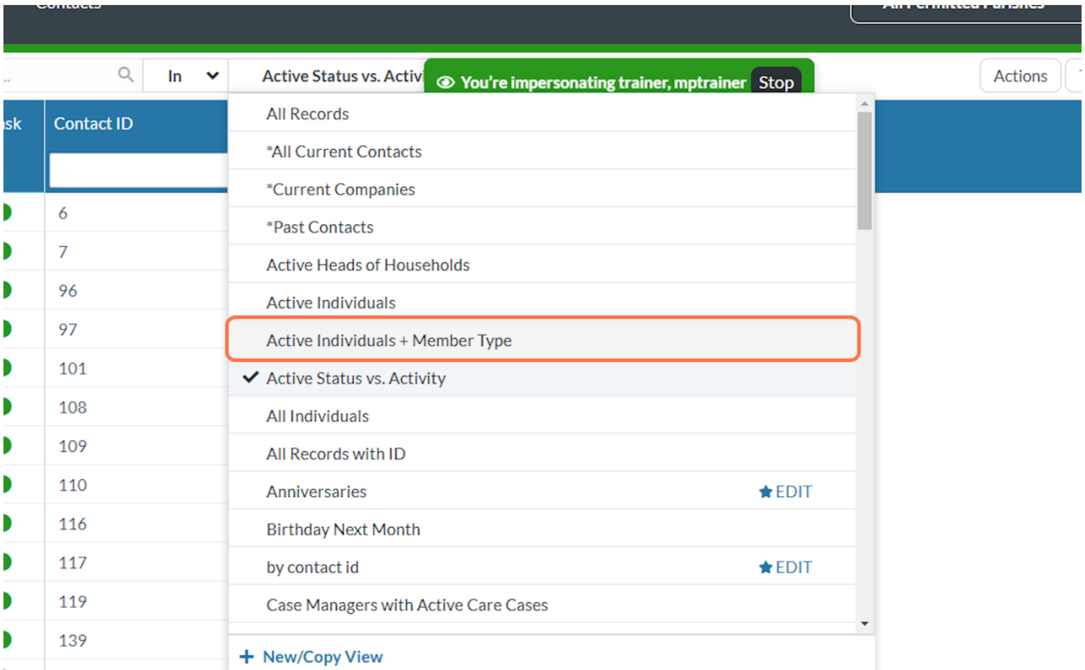
This is a view that you can use to compare the activity of a person with their contact status. (Activity is recorded any time that you record a donation, record attendance for that person for an event, put them in a group, assign a sacrament, etc). Their contact status is a static status that indicates if they are active or not. You can update their contact status by looking at their activity within your parish.

Keep in mind: This also depends on if you are entering the "activity" data in other areas of MP. the data is only as good as you make it!



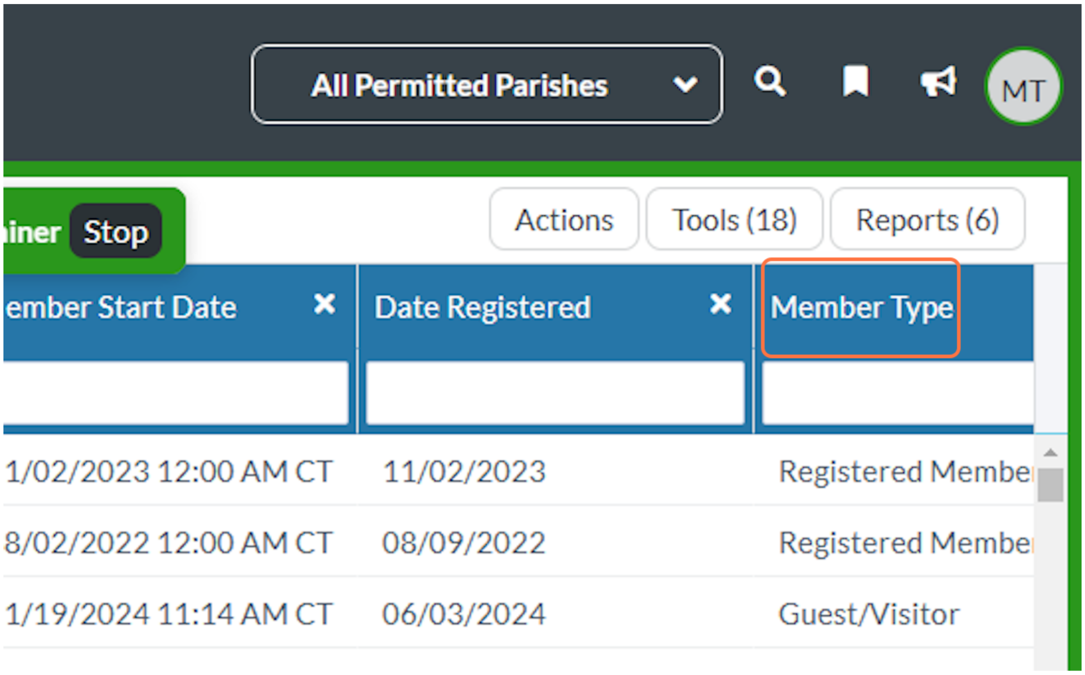
STEP 4

The other view you can use is Active Individuals + Member Type



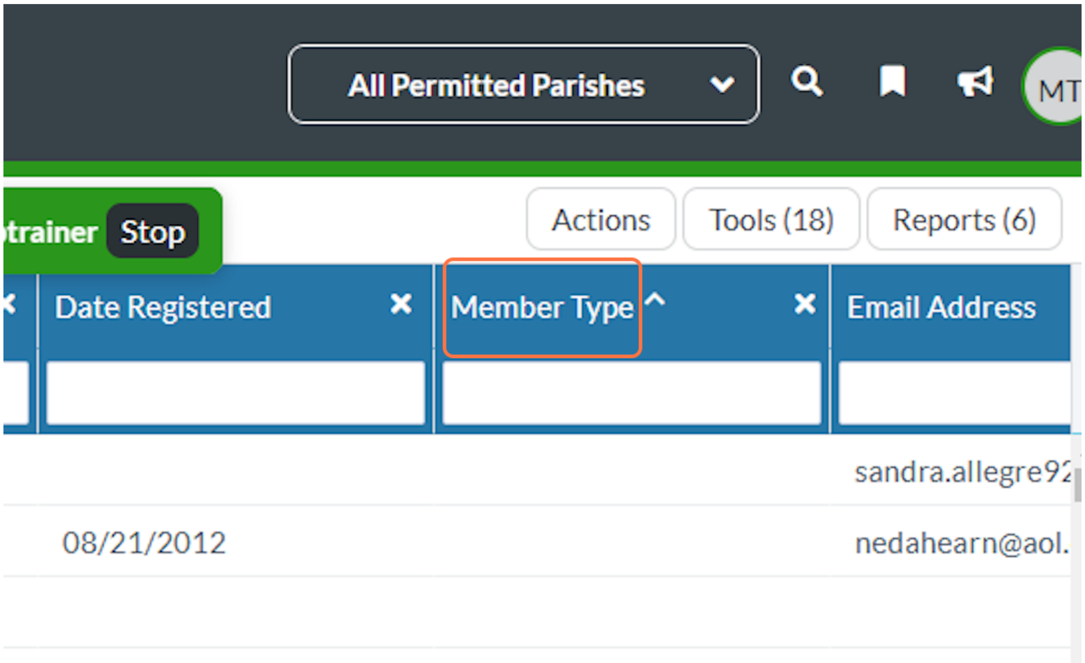
STEP 5

Click on Member Type. This will help you sort the columns to group the member types together and sort by alphabetical order.



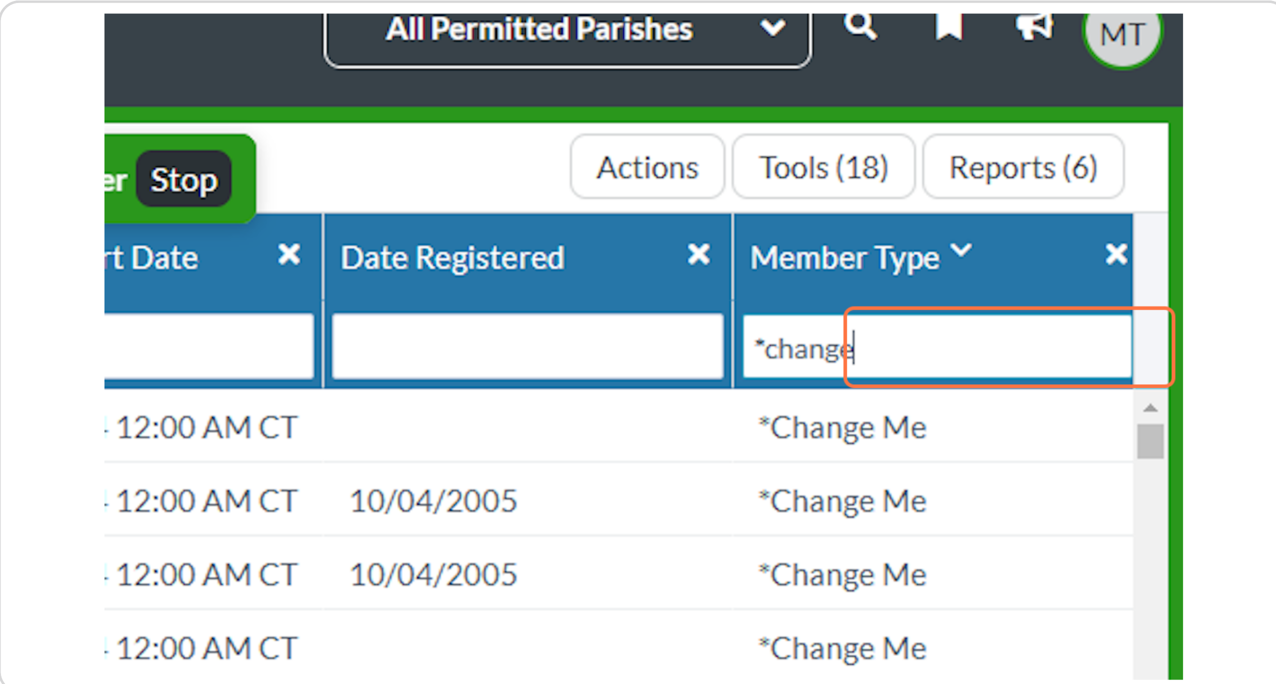
STEP 6

You can click on the column again to sort null values to the top. This means that those records don't have any member type associated with them.



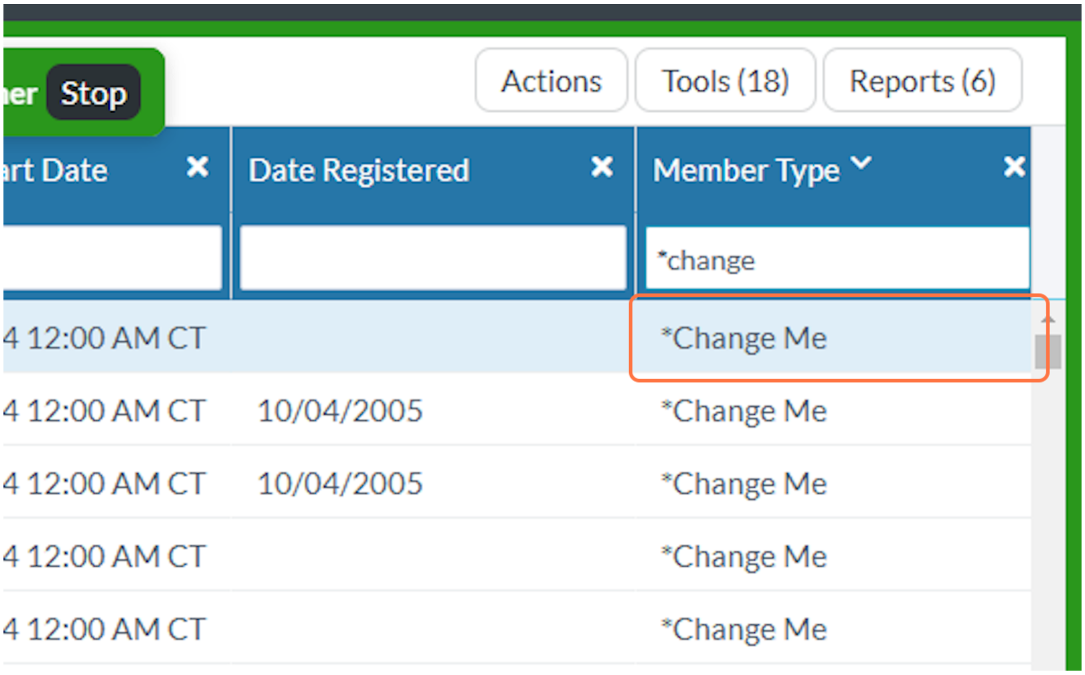
STEP 7

A common member type that came over from PDS was *Change Me. This simply means that this person needs to have a member type assigned to them. You can search for these people by entering "*change" in the search field.



STEP 8

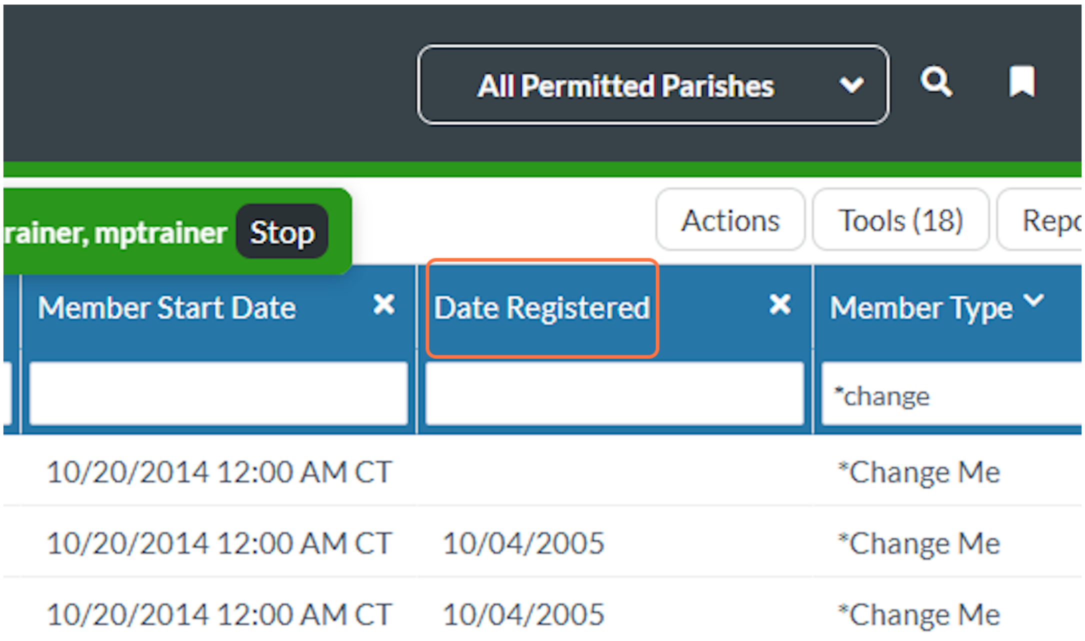
These are the results that will return to you.



STEP 9

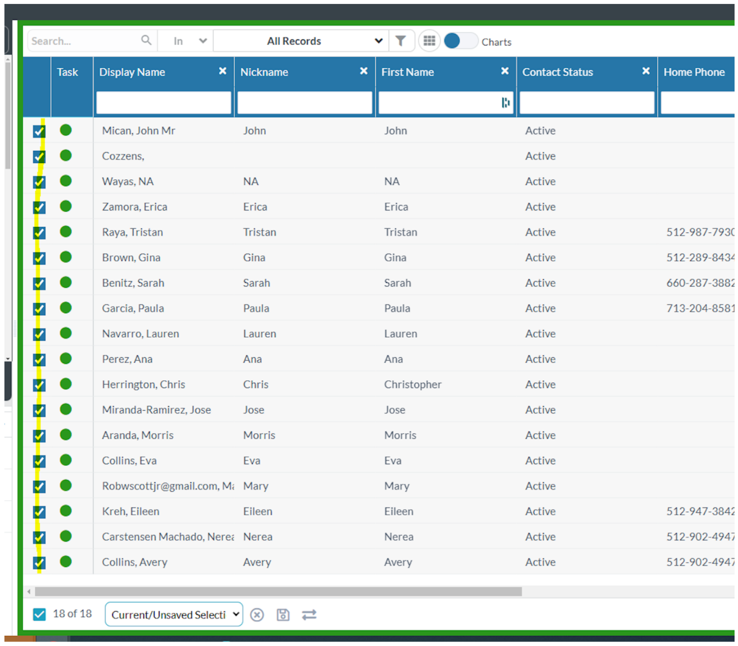
You can also search by date registered. If you know that you registered members have a date registered field, you can safely assume that anyone with a date registered field could be mass assigned the member type of "Registered Member".

If you aren't sure if these folks are still registered at your parish, it would be worth looking through these and selecting which ones you want to keep as "Registered Members".



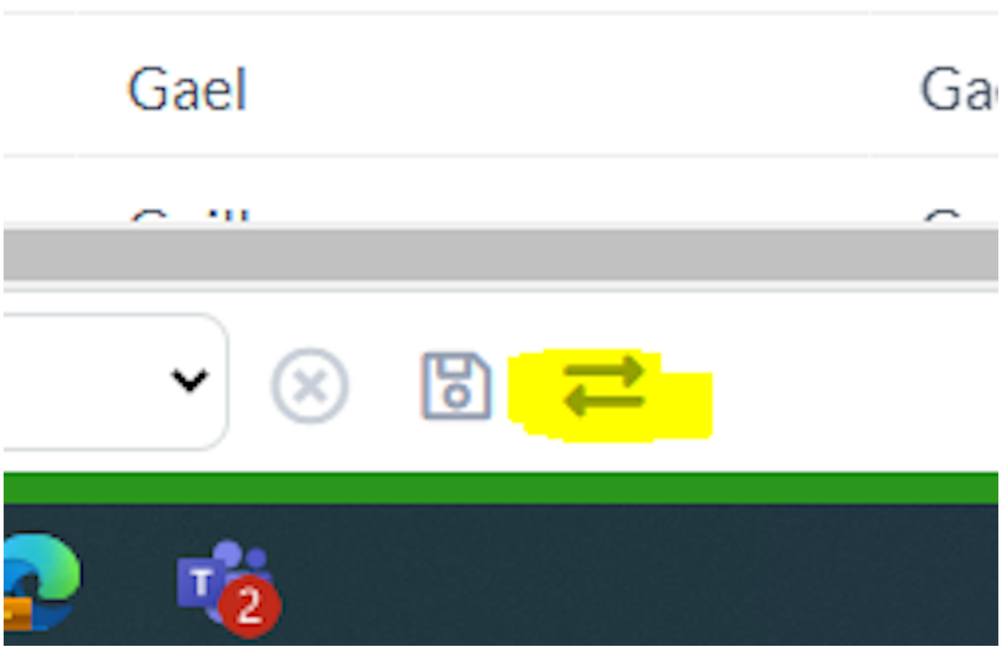
STEP 10

Make a selection for the records you want to affect.



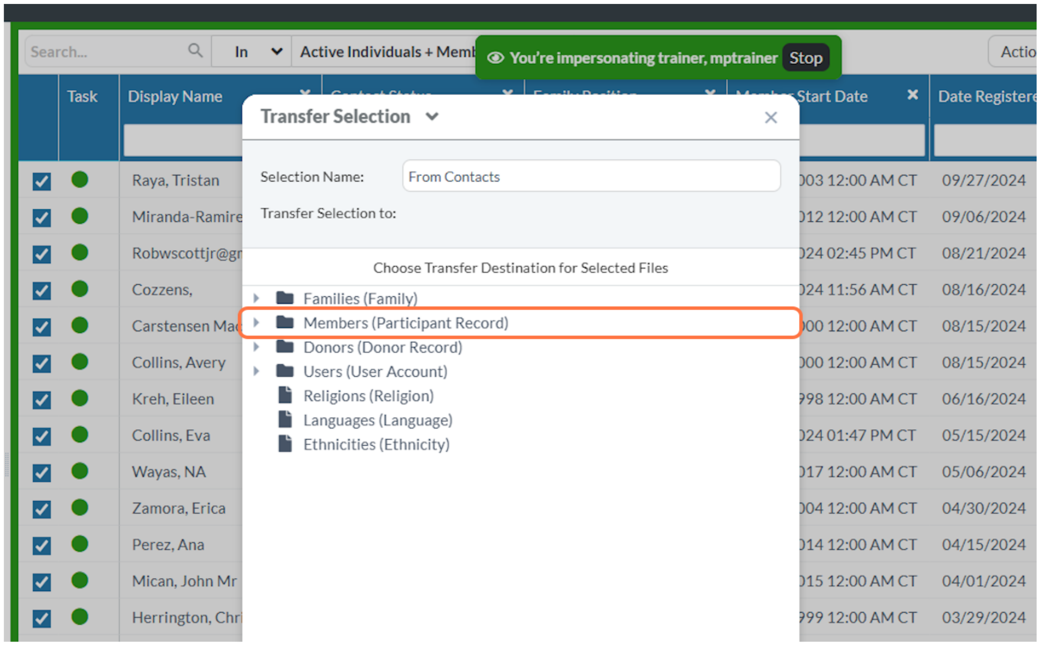
STEP 11

Once you have made a selection, click on Transfer button at bottom.



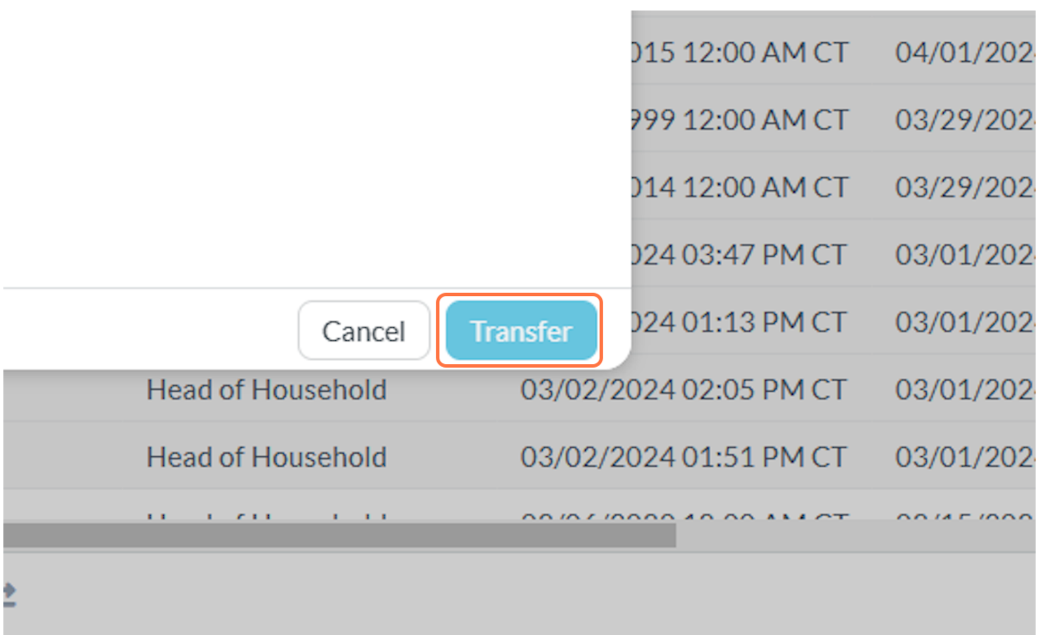
STEP 12

Click on Members (Participant Record)



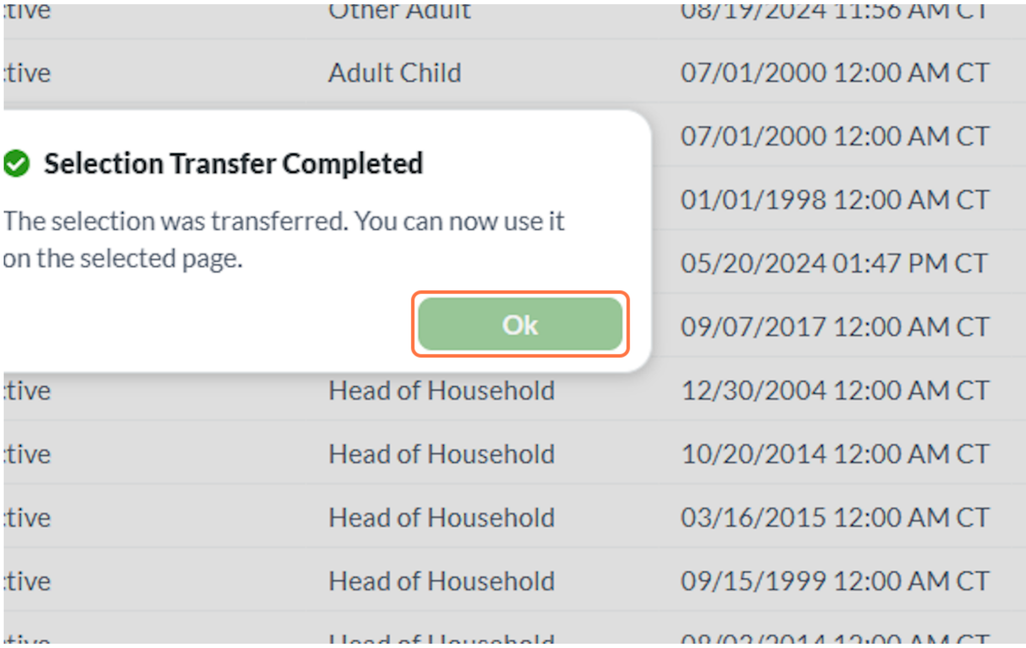
STEP 13

Click on Transfer



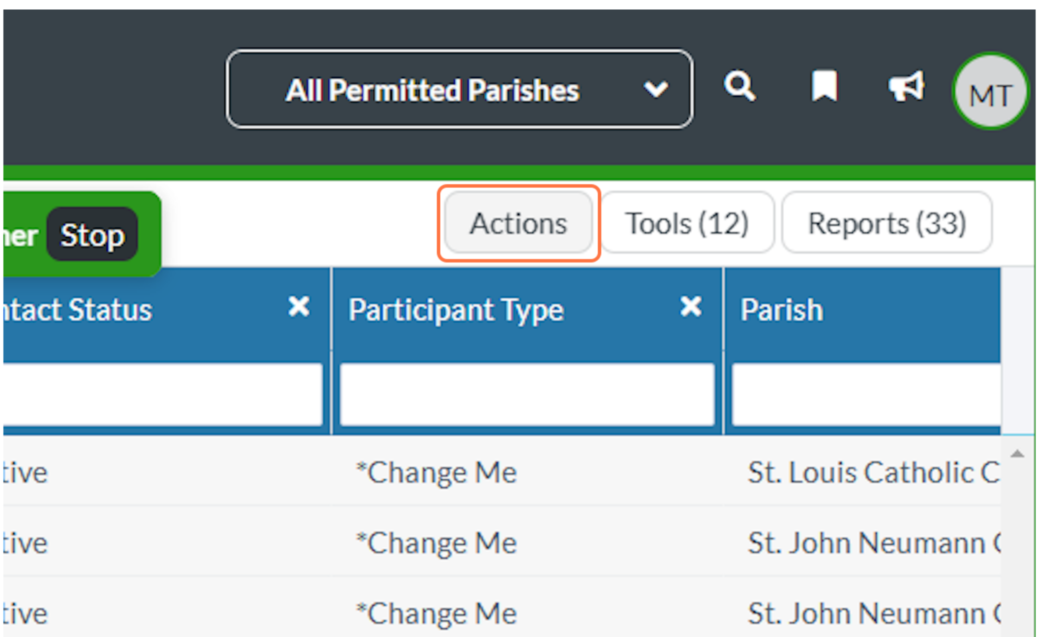
STEP 14

Click on Ok



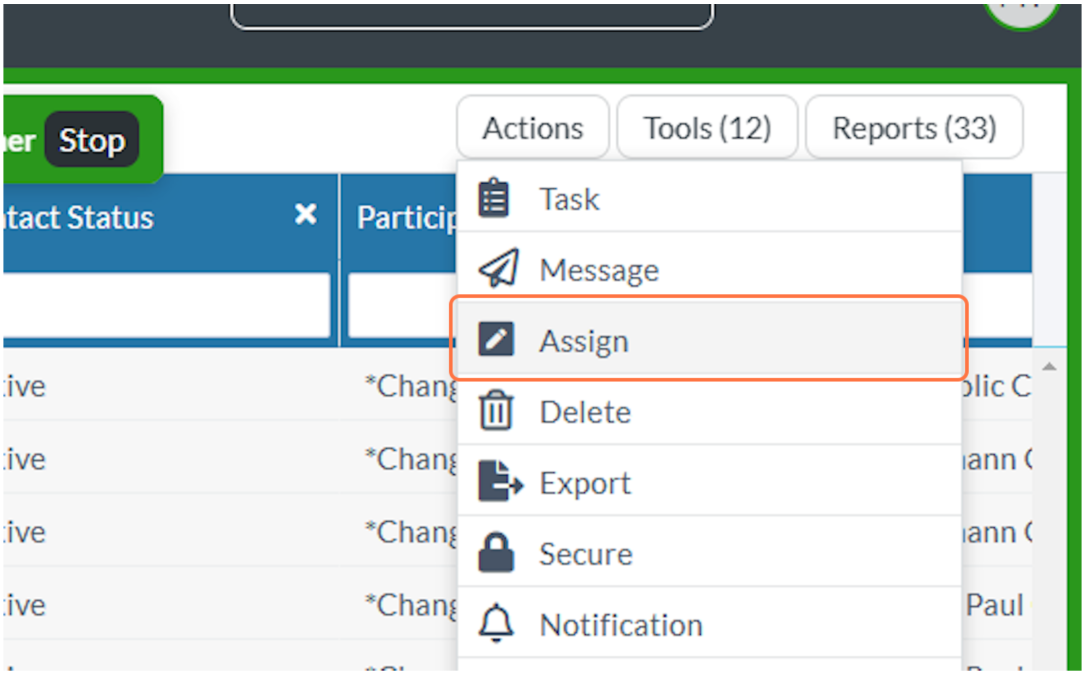
STEP 15

Click on Actions



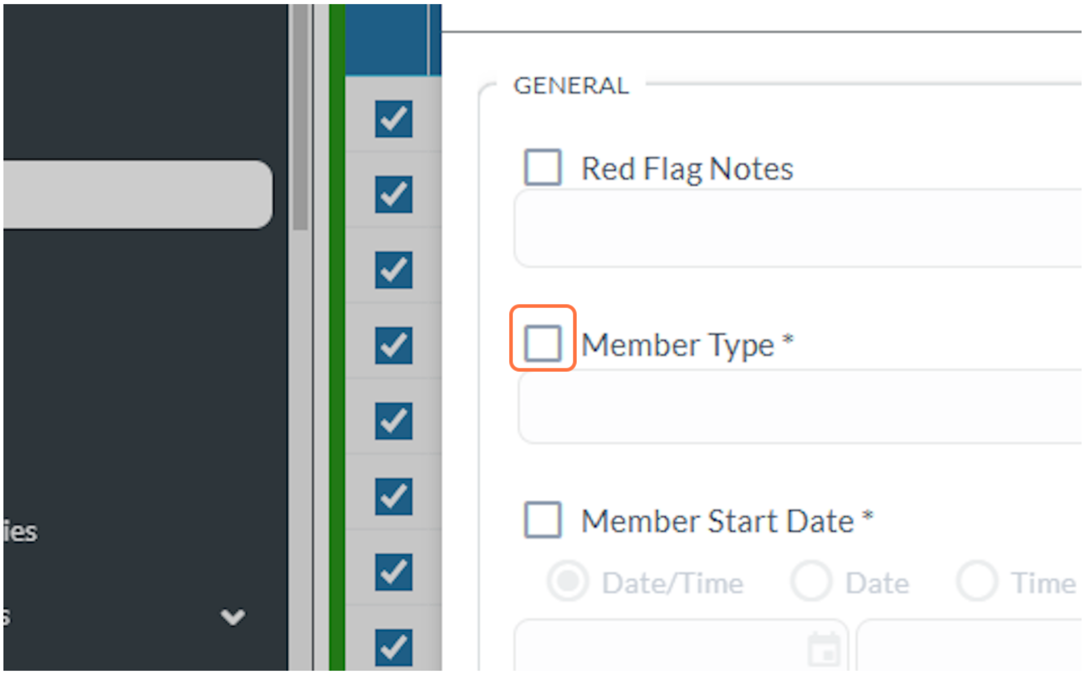
STEP 16

Click on Assign



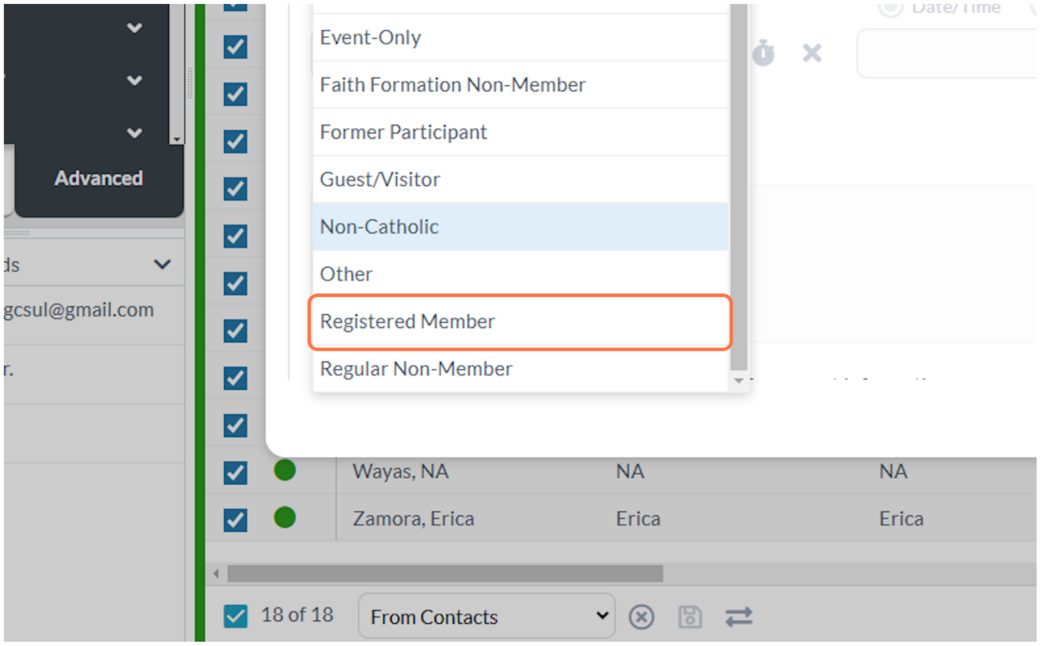
STEP 17

Click on Member Type. Depending on what you want to do with these records, you will select a different Member Type every time transfer a selection to the Members page.



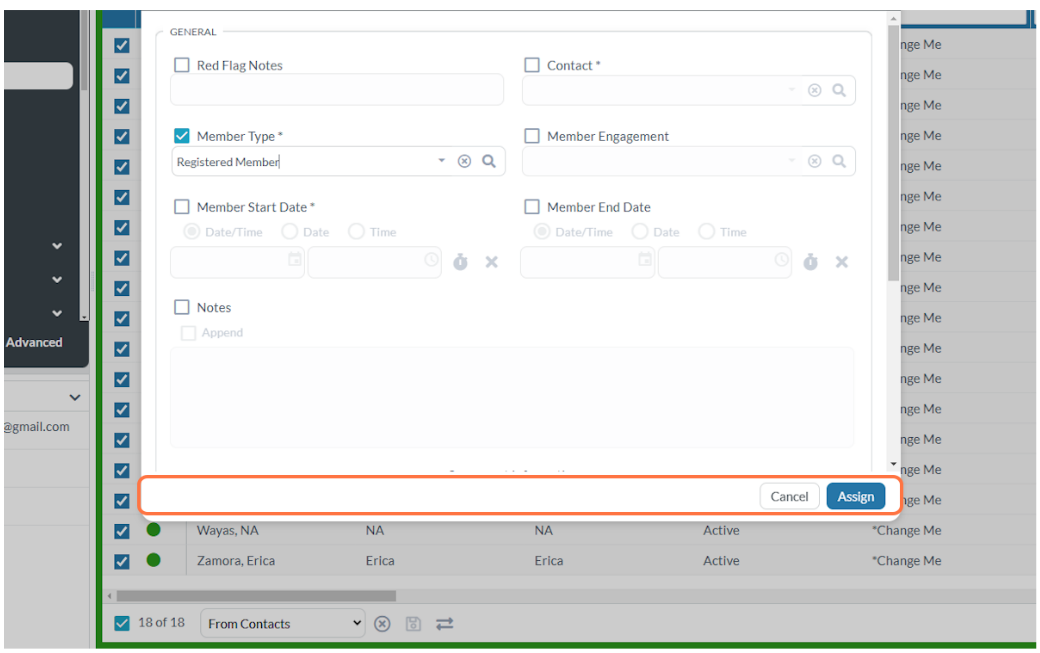
STEP 18

For this example, we'll click on Registered Member



STEP 19

Click on Assign to save.



STEP 20

MAKE SURE you CLEAR out your selection EVERY time you use mass assign. You don't want the selections to carry over every time!