

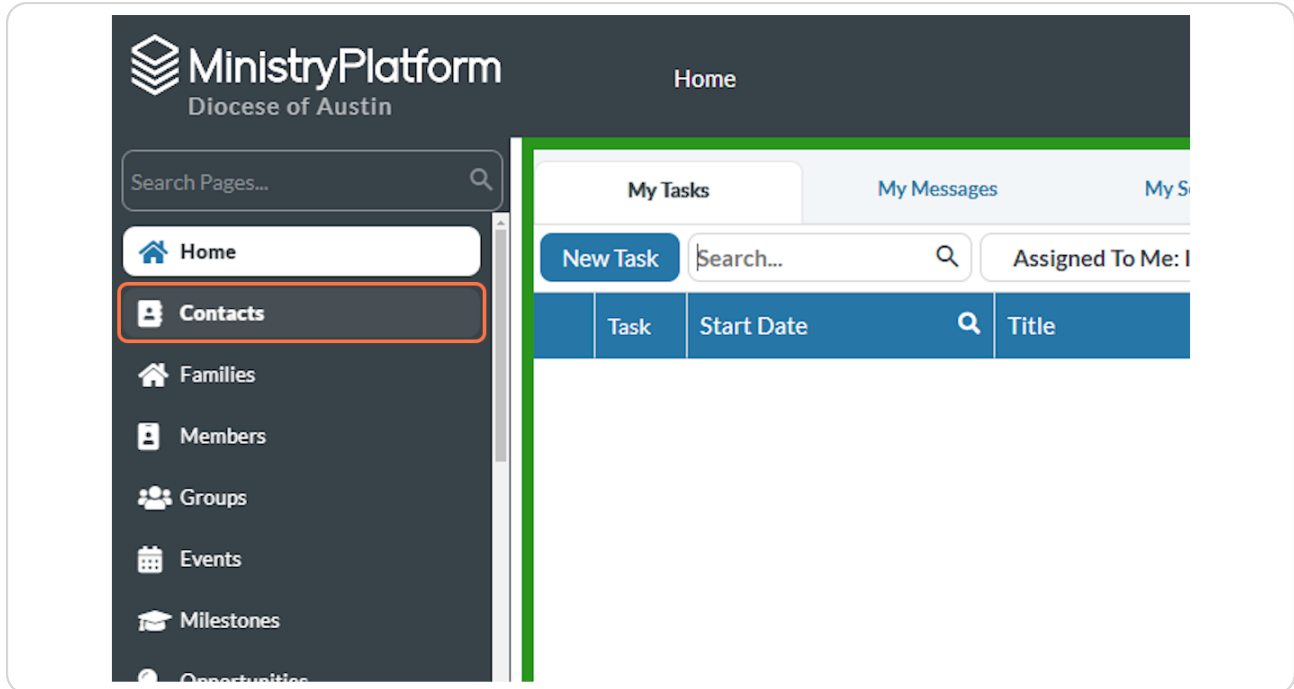
Managing Registration Status through Mass Assign and Member Type

20 Steps [View most recent version](#) 

Created by	Creation Date	Last Updated
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STEP 1




Click on Contacts












STEP 2

Click on view drop down

Contacts

Search...  In  All Individuals  You're impersonating trainer, mptrainer

Task	Display Name 	Nickname 	Email Address 	First N
	Clary, Eileen	Eileen	ecatherinec930@gmail.com	Eileen
	Cole, Elaine	Elaine	deanlycole@gmail.com	Elaine
	Clements, David	David	clements.dg@gmail.com	David
	Croston, Minerva	Minerva		Miner
	Bercen, Carol	Carol	carolbercen@yahoo.com	Carol
	Bhagat, Irene	Irene	bhagat3427@aol.com	Irene

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!

The screenshot shows the 'Contacts' interface. At the top, there's a header bar with 'Contacts' on the left and 'All Permitted Parishes' on the right. Below the header, there's a search bar and a dropdown menu currently set to 'In'. A secondary dropdown menu is open, showing various filters. The option 'Active Status vs. Activity' is highlighted with an orange border. To the right of the dropdown, there's a 'You're impersonating trainer, mptrainer' notification with a 'Stop' button. Further right, there's an 'Actions' button. On the far right, there's a 'Contact Status' dropdown menu showing 'Active' as the selected status. The main table below has columns for 'Display Name' and 'Contact Status'. The 'Display Name' column lists several individuals, and the 'Contact Status' column shows 'Active' for all of them.

Display Name	Contact Status
Clary, Eileen	Active
Cole, Elaine	Active
Clements, David	Active
Croston, Minerva	Active
Bercen, Carol	Active
Bhagat, Irene	Active
Bergerson, Dolores	Active
Blackmon, Kerry	Active
Eyler, Bob	Active
Esquivel, Maria Guadalupe	Active
Erwin, Sandra	Active

STEP 4

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

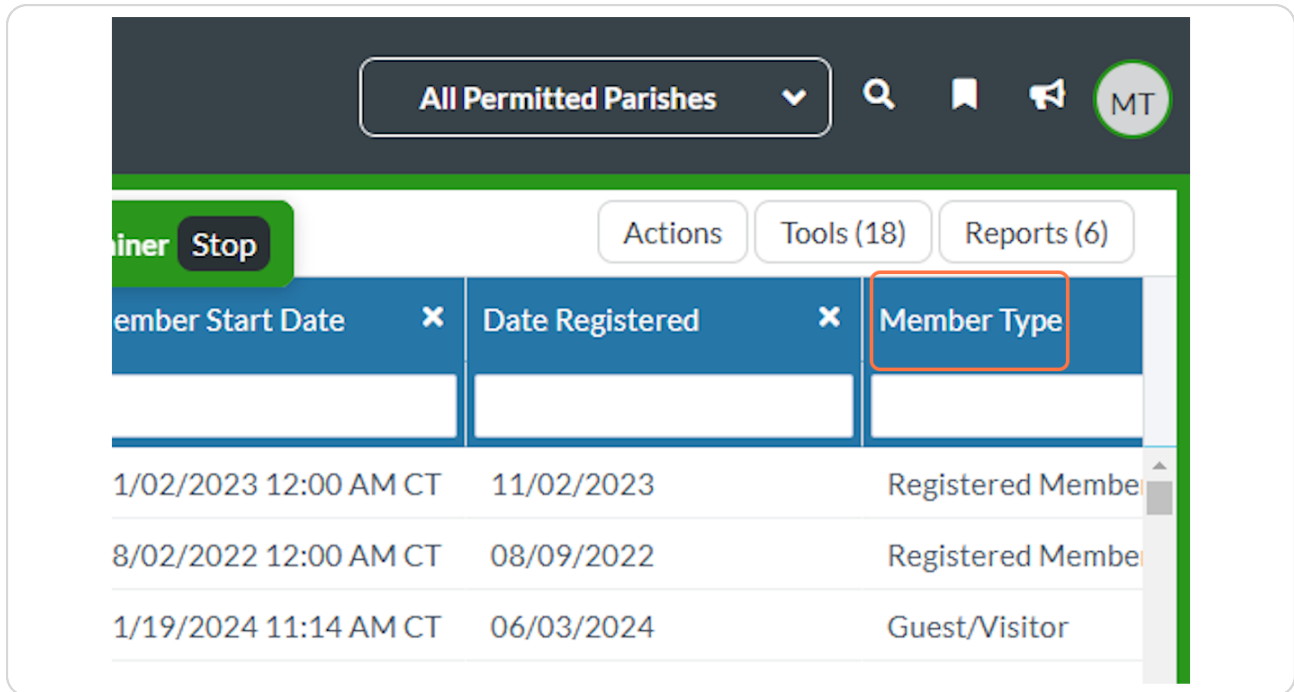
The screenshot shows a CRM interface with a table of contacts and a dropdown menu open. The table has columns for 'Task' and 'Contact ID'. The dropdown menu is titled 'Active Status vs. Activity' and lists various views. The view 'Active Individuals + Member Type' is highlighted with a red rectangle. The current view is 'Active Status vs. Activity', indicated by a checkmark.

Task	Contact ID
	6
	7
	96
	97
	101
	108
	109
	110
	116
	117
	119
	139

- All Records
- *All Current Contacts
- *Current Companies
- *Past Contacts
- Active Heads of Households
- Active Individuals
- Active Individuals + Member Type**
- ✓ Active Status vs. Activity
- All Individuals
- All Records with ID
- Anniversaries [★ EDIT](#)
- Birthday Next Month
- by contact id [★ EDIT](#)
- Case Managers with Active Care Cases
- + New/Copy View

STEP 5

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

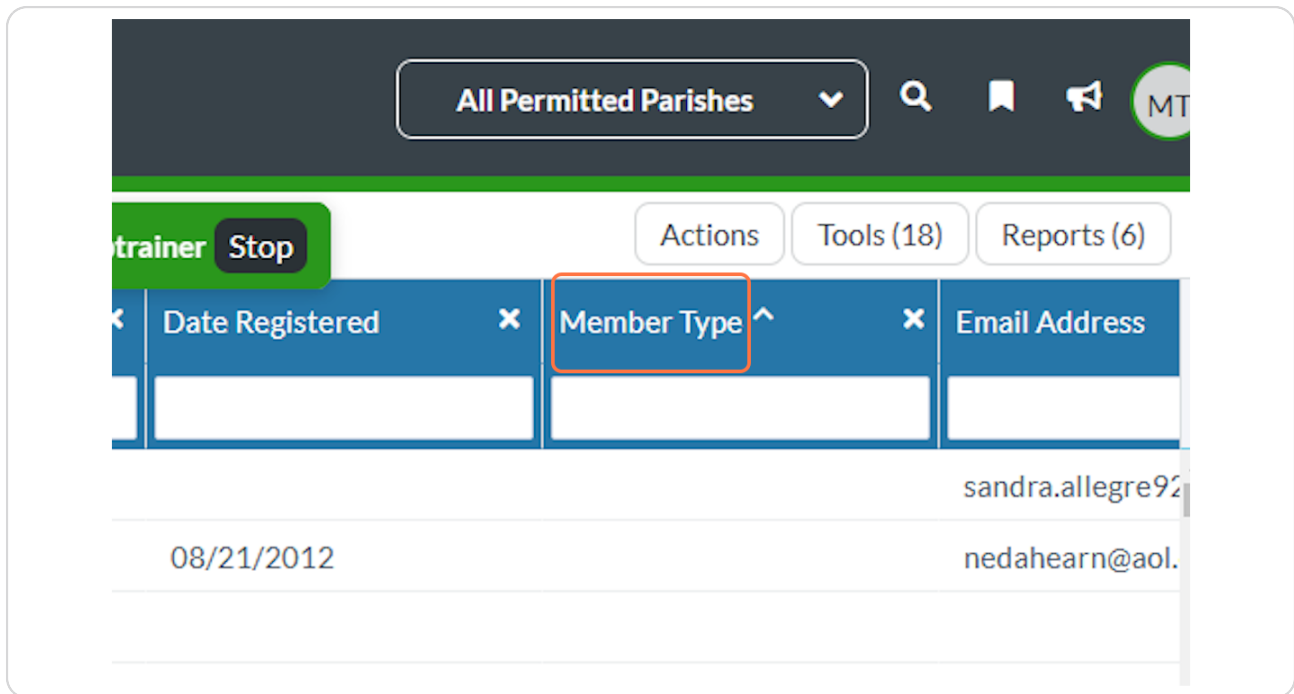


The screenshot shows a web application interface. At the top, there is a dark header bar with a dropdown menu labeled "All Permitted Parishes", a search icon, a bookmark icon, a share icon, and a circular button labeled "MT". Below the header, there is a green bar with a "Stop" button. To the right of the "Stop" button are three buttons: "Actions", "Tools (18)", and "Reports (6)". Below these buttons is a table with three columns: "Member Start Date", "Date Registered", and "Member Type". The "Member Type" column is highlighted with a red box. The table contains three rows of data:

Member Start Date	Date Registered	Member Type
1/02/2023 12:00 AM CT	11/02/2023	Registered Member
8/02/2022 12:00 AM CT	08/09/2022	Registered Member
1/19/2024 11:14 AM CT	06/03/2024	Guest/Visitor

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.

The screenshot shows a web application interface with a dark header bar. On the left, there is a dropdown menu labeled "All Permitted Parishes" with a downward arrow. To its right are icons for search, a bookmark, and a refresh. Further right is a circular button labeled "MT". Below the header, there is a green bar with a "Stop" button. To the right of the "Stop" button are three buttons: "Actions", "Tools (18)", and "Reports (6)". Below these buttons is a table with three columns: "Start Date", "Date Registered", and "Member Type". Each column has a close button (an 'x' in a square). The "Member Type" column has a dropdown arrow. In the "Member Type" column, there is a search input field containing the text "*change". Below the search field, there are four rows of data. Each row shows a time "12:00 AM CT" in the "Start Date" column, a date "10/04/2005" in the "Date Registered" column, and the member type "*Change Me" in the "Member Type" column. A red rectangle highlights the search input field in the "Member Type" column.

Start Date	Date Registered	Member Type
12:00 AM CT		*Change Me
12:00 AM CT	10/04/2005	*Change Me
12:00 AM CT	10/04/2005	*Change Me
12:00 AM CT		*Change Me

STEP 8

These are the results that will return to you.

er Stop

ActionsTools (18)Reports (6)

art Date	Date Registered	Member Type
		*change
4 12:00 AM CT		*Change Me
4 12:00 AM CT	10/04/2005	*Change Me
4 12:00 AM CT	10/04/2005	*Change Me
4 12:00 AM CT		*Change Me
4 12:00 AM CT		*Change Me

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".

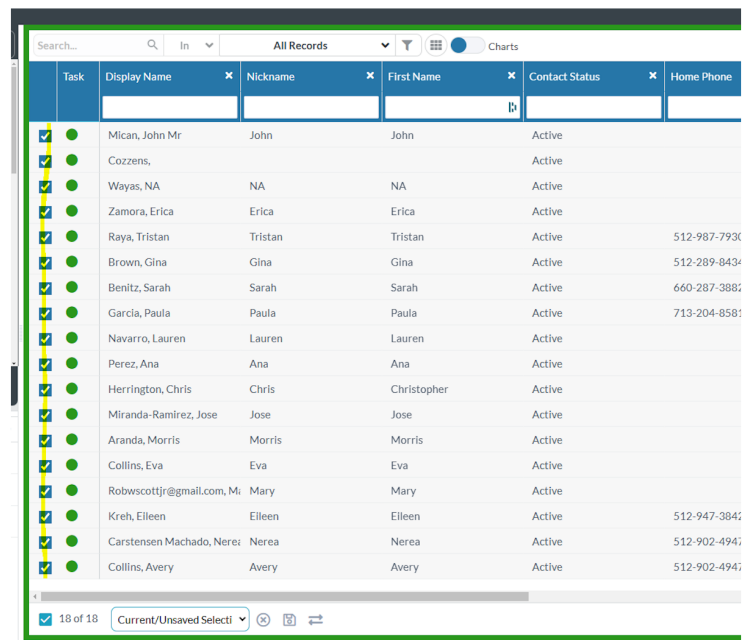
If you aren't sure if these folks are still registered at your parish, it would be worth looking through these and selecting which ones you want to keep as "Registered Members".

The screenshot shows a web application interface with a dark header bar containing a dropdown menu labeled "All Permitted Parishes" and search and bookmark icons. Below the header is a green bar with the text "rainer, mptrainer" and a "Stop" button. To the right of this bar are buttons for "Actions", "Tools (18)", and "Repor". Below these buttons is a table with three columns: "Member Start Date", "Date Registered", and "Member Type". The "Date Registered" column is highlighted with an orange box. The table contains three rows of data, each with a date and a link to change the member type.

Member Start Date	Date Registered	Member Type
10/20/2014 12:00 AM CT		*change
10/20/2014 12:00 AM CT	10/04/2005	*Change Me
10/20/2014 12:00 AM CT	10/04/2005	*Change Me

STEP 10

Make a selection for the records you want to affect.

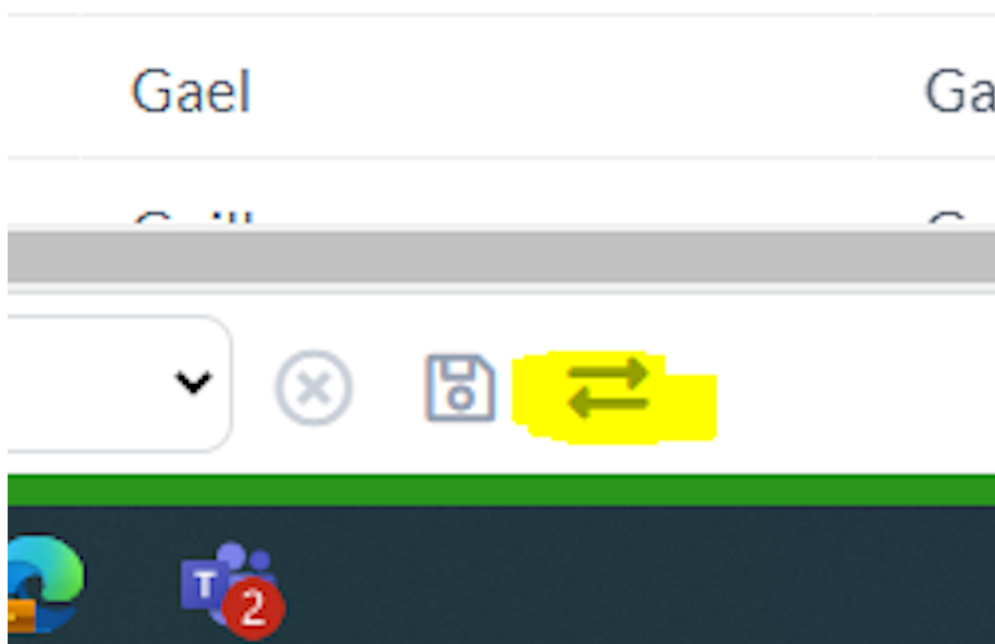


The screenshot shows a CRM interface with a table of records. A vertical yellow line highlights the first column, which contains checkboxes for selecting records. The table has columns for Task, Display Name, Nickname, First Name, Contact Status, and Home Phone. The status of all records is 'Active'.

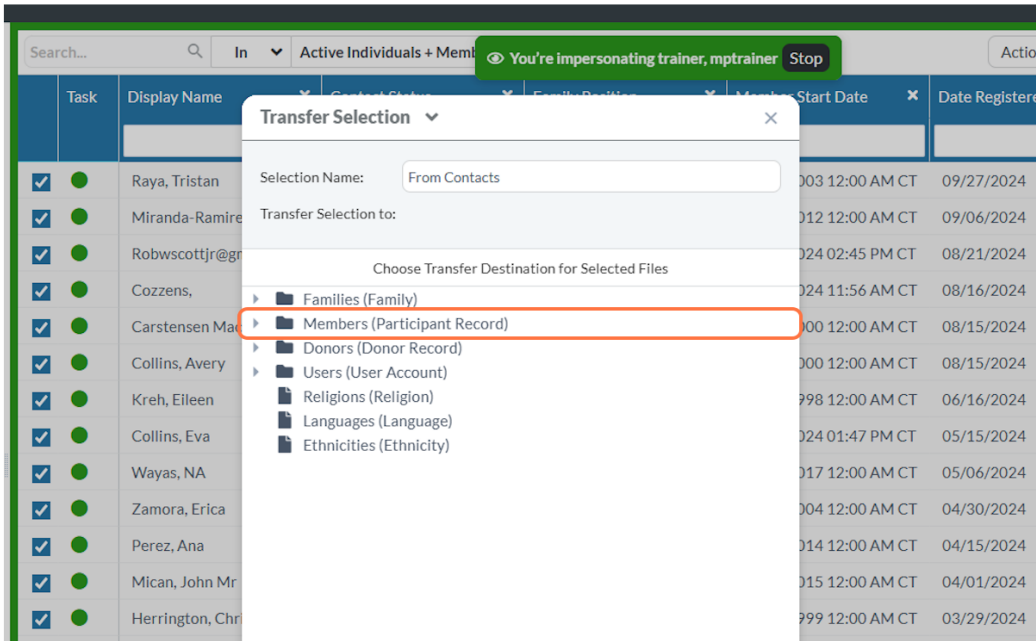
Task	Display Name	Nickname	First Name	Contact Status	Home Phone
<input checked="" type="checkbox"/>	Mican, John Mr	John	John	Active	
<input checked="" type="checkbox"/>	Cozzens,			Active	
<input checked="" type="checkbox"/>	Wayas, NA	NA	NA	Active	
<input checked="" type="checkbox"/>	Zamora, Erica	Erica	Erica	Active	
<input checked="" type="checkbox"/>	Raya, Tristan	Tristan	Tristan	Active	512-987-7936
<input checked="" type="checkbox"/>	Brown, Gina	Gina	Gina	Active	512-289-8434
<input checked="" type="checkbox"/>	Benitz, Sarah	Sarah	Sarah	Active	660-287-3882
<input checked="" type="checkbox"/>	Garcia, Paula	Paula	Paula	Active	713-204-8581
<input checked="" type="checkbox"/>	Navarro, Lauren	Lauren	Lauren	Active	
<input checked="" type="checkbox"/>	Perez, Ana	Ana	Ana	Active	
<input checked="" type="checkbox"/>	Herrington, Chris	Chris	Christopher	Active	
<input checked="" type="checkbox"/>	Miranda-Ramirez, Jose	Jose	Jose	Active	
<input checked="" type="checkbox"/>	Aranda, Morris	Morris	Morris	Active	
<input checked="" type="checkbox"/>	Collins, Eva	Eva	Eva	Active	
<input checked="" type="checkbox"/>	Robwscottjr@gmail.com, M	Mary	Mary	Active	
<input checked="" type="checkbox"/>	Kreh, Eileen	Eileen	Eileen	Active	512-947-3841
<input checked="" type="checkbox"/>	Carstensen Machado, Nere	Nerea	Nerea	Active	512-902-4941
<input checked="" type="checkbox"/>	Collins, Avery	Avery	Avery	Active	512-902-4941

STEP 11

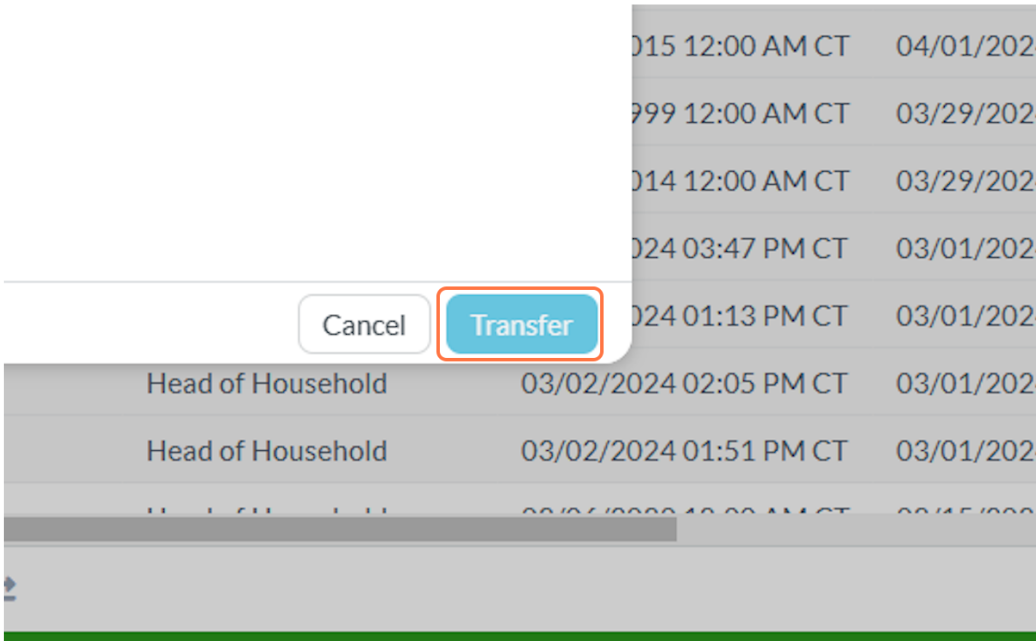
Once you have made a selection, click on Transfer button at bottom.



Click on Members (Participant Record)

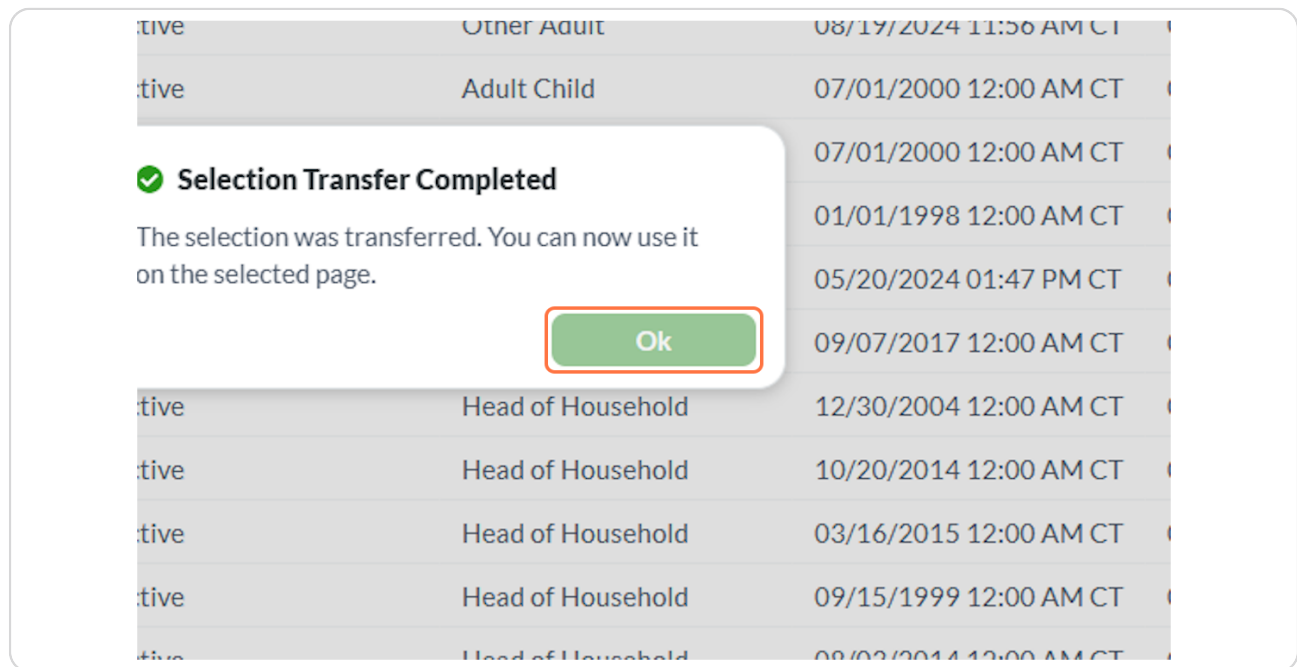


Click on Transfer



STEP 14

Click on Ok

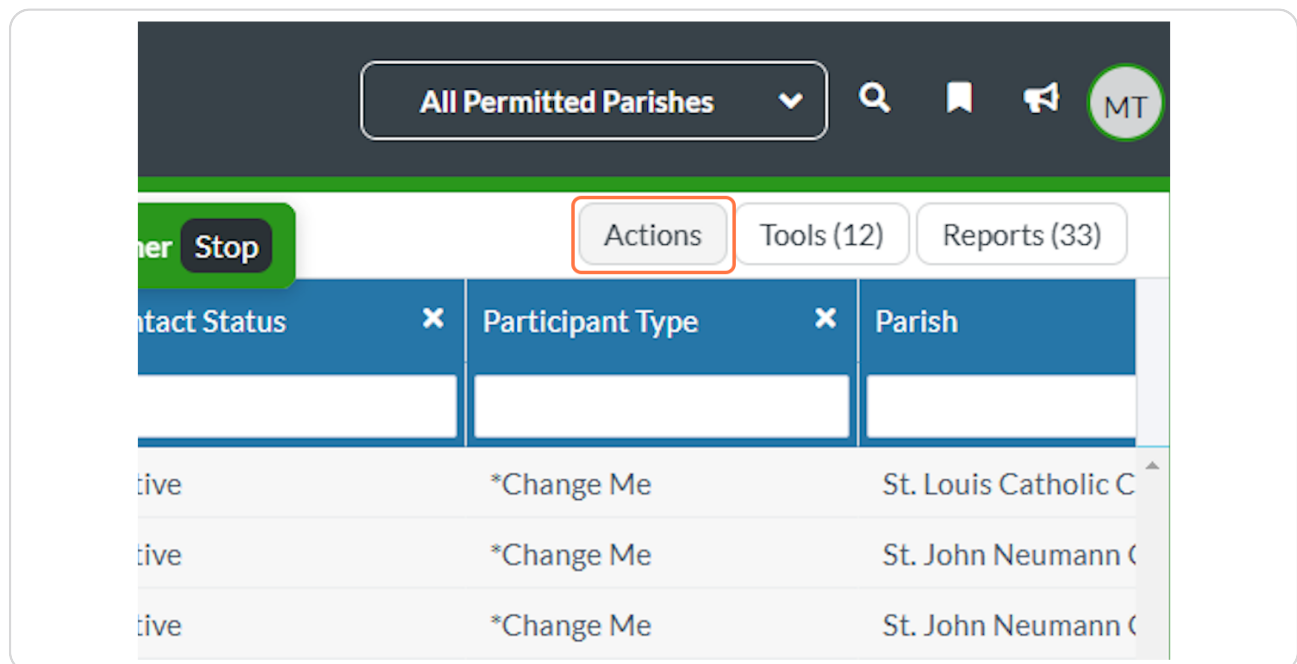


A screenshot of a web application interface. A modal dialog box is centered on the screen with a green checkmark icon and the title "Selection Transfer Completed". Below the title, it says "The selection was transferred. You can now use it on the selected page." At the bottom of the dialog is a green button labeled "Ok", which is highlighted with a red rectangular border. In the background, a table is partially visible with columns for participant type and date. The table rows include "Other Adult", "Adult Child", and "Head of Household".

Participant Type	Date
Other Adult	08/19/2024 11:56 AM CT
Adult Child	07/01/2000 12:00 AM CT
Adult Child	07/01/2000 12:00 AM CT
Adult Child	01/01/1998 12:00 AM CT
Adult Child	05/20/2024 01:47 PM CT
Adult Child	09/07/2017 12:00 AM CT
Head of Household	12/30/2004 12:00 AM CT
Head of Household	10/20/2014 12:00 AM CT
Head of Household	03/16/2015 12:00 AM CT
Head of Household	09/15/1999 12:00 AM CT
Head of Household	09/02/2014 12:00 AM CT

STEP 15

Click on Actions

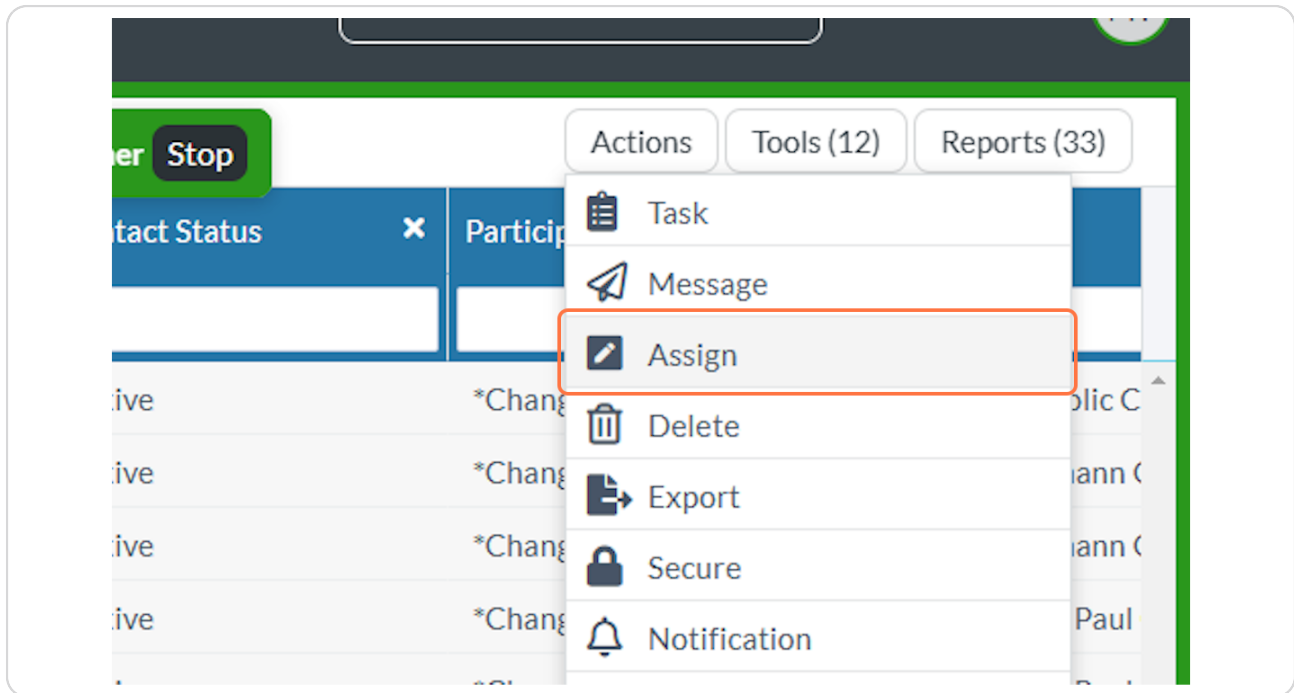


A screenshot of a web application interface. At the top, there is a dark header bar with a dropdown menu labeled "All Permitted Parishes", a search icon, a bookmark icon, a megaphone icon, and a circular button labeled "MT". Below the header, there is a green button labeled "Stop" and a tabbed interface with three tabs: "Actions" (highlighted with a red rectangular border), "Tools (12)", and "Reports (33)". Below the tabs is a table with three columns: "Contact Status", "Participant Type", and "Parish". The table has three rows of data. The first row shows "Active", "*Change Me", and "St. Louis Catholic C". The second row shows "Active", "*Change Me", and "St. John Neumann C". The third row shows "Active", "*Change Me", and "St. John Neumann C".

Contact Status	Participant Type	Parish
Active	*Change Me	St. Louis Catholic C
Active	*Change Me	St. John Neumann C
Active	*Change Me	St. John Neumann C

STEP 16

Click on Assign



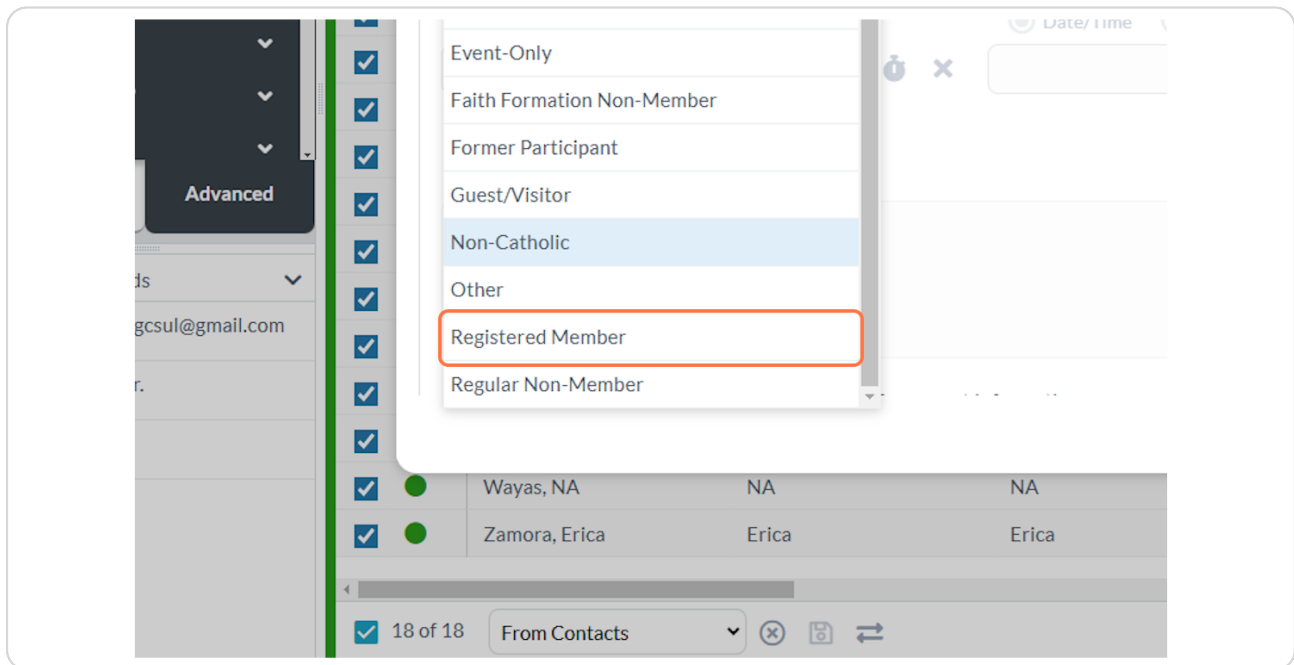
STEP 17

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.

The screenshot shows a software interface with a dark sidebar on the left containing a list of records, each with a blue checkmark. A green vertical bar is positioned between the list and the main content area. On the right, a 'GENERAL' settings panel is visible. It contains three checkboxes: 'Red Flag Notes', 'Member Type *', and 'Member Start Date *'. The 'Member Type *' checkbox is highlighted with a red square. Below the 'Member Start Date *' checkbox, there are three radio buttons labeled 'Date/Time', 'Date', and 'Time'. The 'Date/Time' radio button is selected.

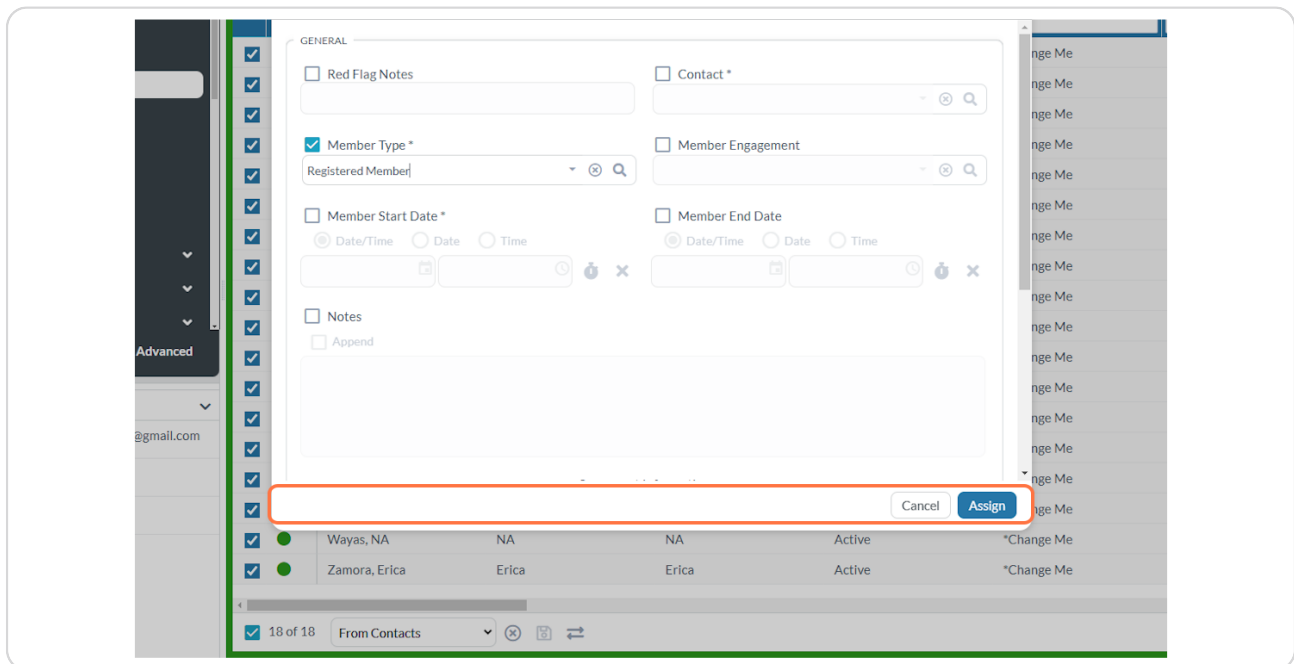
STEP 18

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!

