EzyClub

GUIDE

Membership

For the Membership role

Version 29 September 2026

https://ezyclub.au/guides

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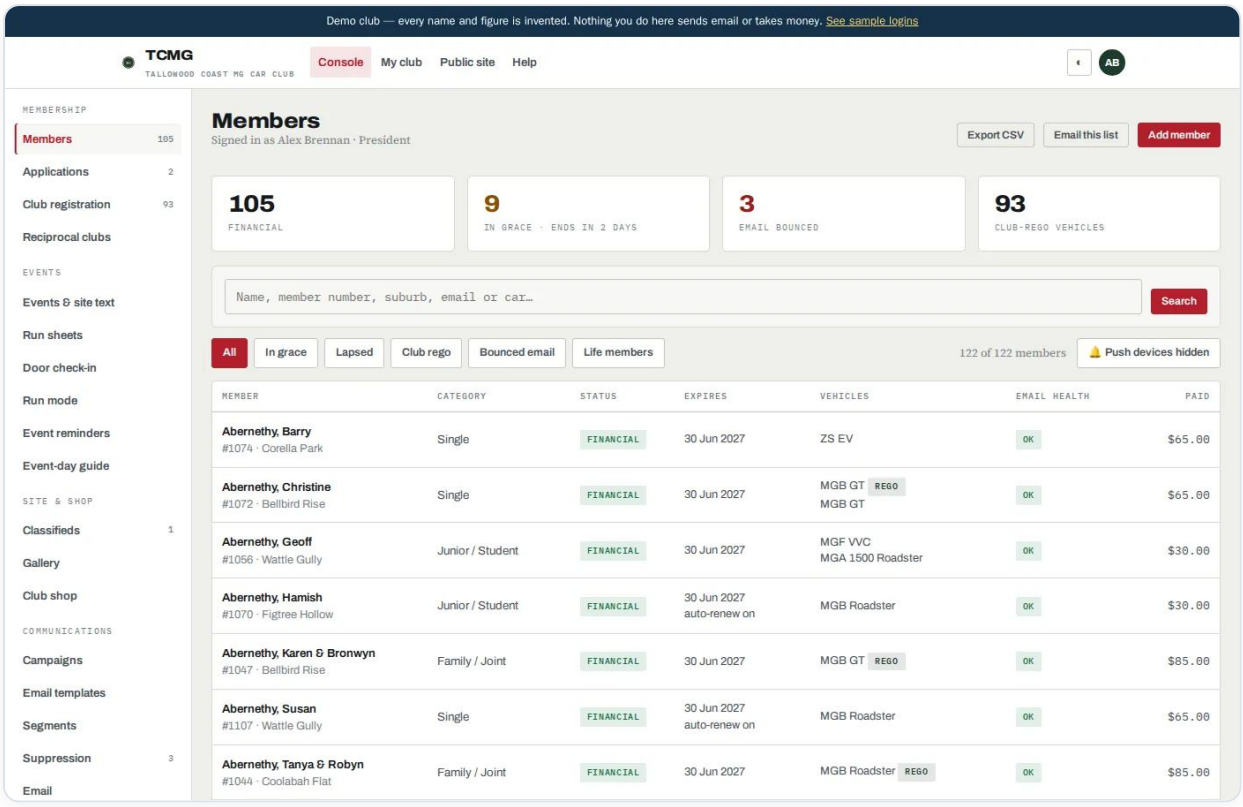
The Membership role looks after the member list: the records themselves, applications from the website, renewals and payments taken by hand, the concessional-registration roster, partner clubs and imports. Everything is under **Membership** in the console sidebar. Other committee members can read the roster; only the Membership role can change it.

The member list

Membership → Members is the roster, and the first page of the console. The tiles across the top count financial members, those in the grace period (and how long it has left), bounced email addresses and vehicles on club registration.

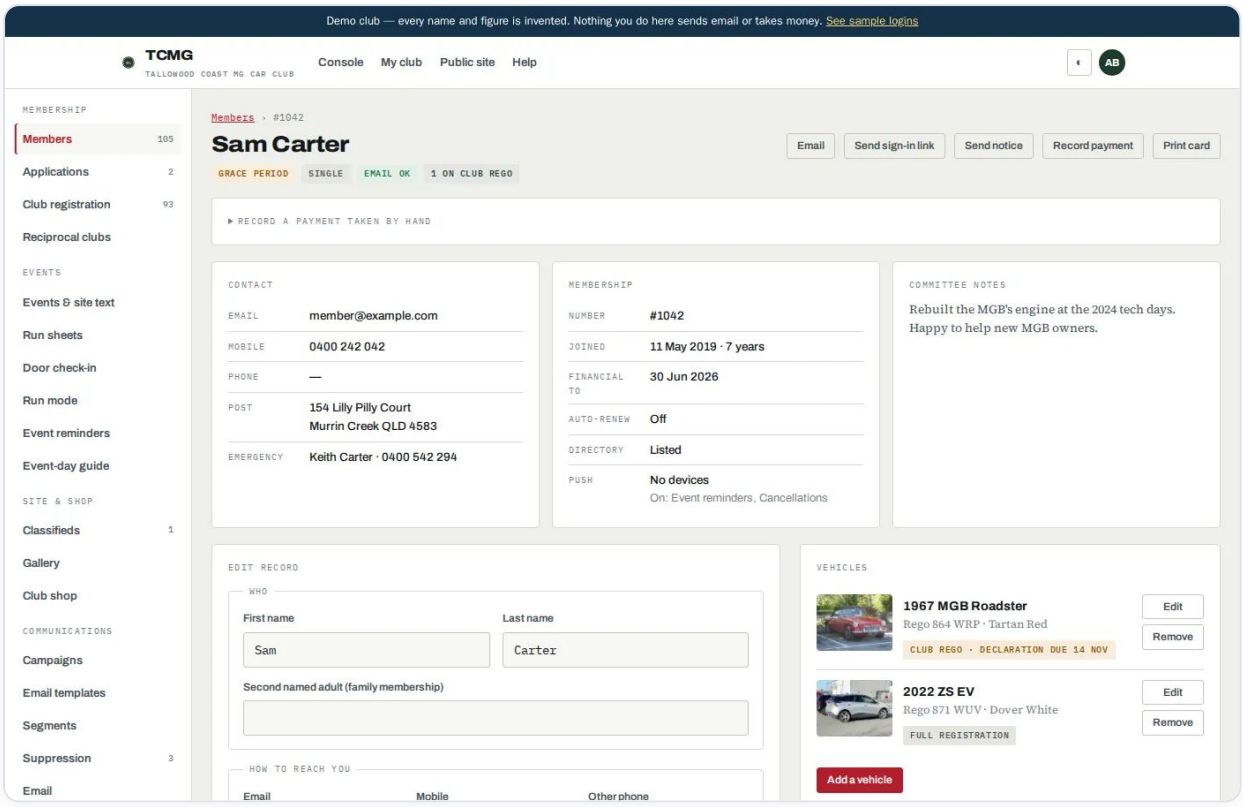


The member list. Click a name to open the record.

- **Search** finds a member by name, member number, suburb, email or car.
- The chips narrow the list: **In grace**, **Lapsed**, **Club rego**, **Bounced email** and **Life members**. The count beside them says how many of the whole list are showing.
- **Push devices** adds a column showing which phones each member has signed up for notifications. Press it again to hide it.
- **Export CSV** downloads the list. **Email this list** opens Campaigns, where a message is written and sent to a segment (it needs the Communications role).

A member’s record

Click a name to open the record. The badges under the name show the status, category, email health and club-rego vehicles. Below are the contact details, the membership panel (number, joined, financial-to date, auto-renew, directory listing, push), committee notes, the edit form, vehicles and a dated history of everything that has changed.



A member’s record. The buttons across the top do the common jobs.

The buttons across the top:

Button	What it does
Email	Opens your own email program, addressed to the member.
Send sign-in link	Emails a one-time link that signs them in. The quickest fix for a forgotten password.
Send notice	Opens Campaigns, to write a notice by email and push (needs the Communications role).
Record payment	Opens **Record a payment taken by hand** (see below).
Print card	A printable membership card with the same check-in code as the card on their phone.

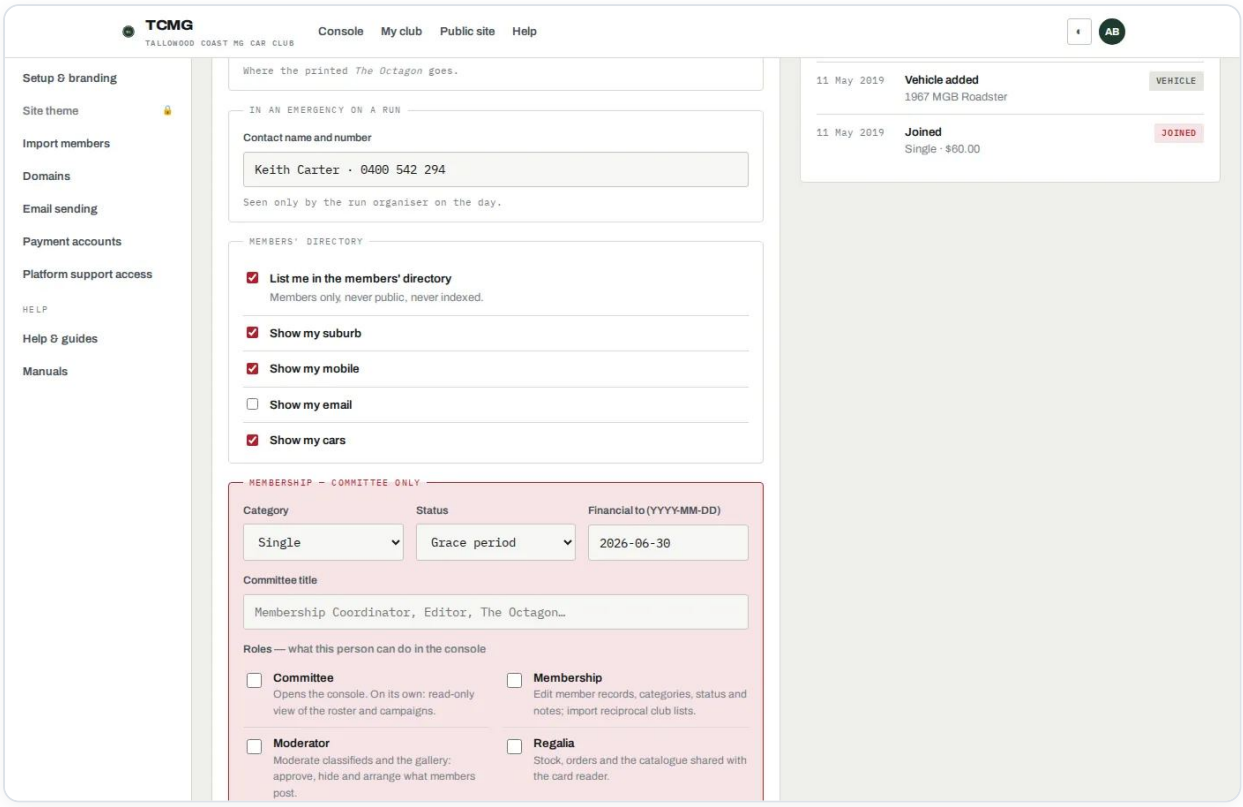
To change a member’s details

1. Open the record and scroll to **Edit record**.
2. Change the name, contact details, postal address, emergency contact or directory settings.
3. Press **Save changes**. Every save is dated in the history at the bottom.

> If you change someone’s email address, the new address is confirmed by email before it takes over, and their sign-in moves with it.

The committee-only fields

The **Membership — committee only** section holds the member's category, status, financial-to date, committee title and private committee notes. The member never sees these. The tick boxes for console roles are here too, but only someone with the Roles role can change them — see Roles and access.



Category, status, financial-to date and roles.

Vehicles

Under **Vehicles**, press **Add a vehicle** or **Edit** beside one. Each car can have up to 12 photos; location data is stripped from every photo on the way in. A car on concessional registration shows its declaration due date here and on the club-rego roster.

Payments taken by hand

When a member pays cash at a meeting, by bank transfer or by EFTPOS, record it on their record so the membership moves on and the Treasurer sees it in the books.

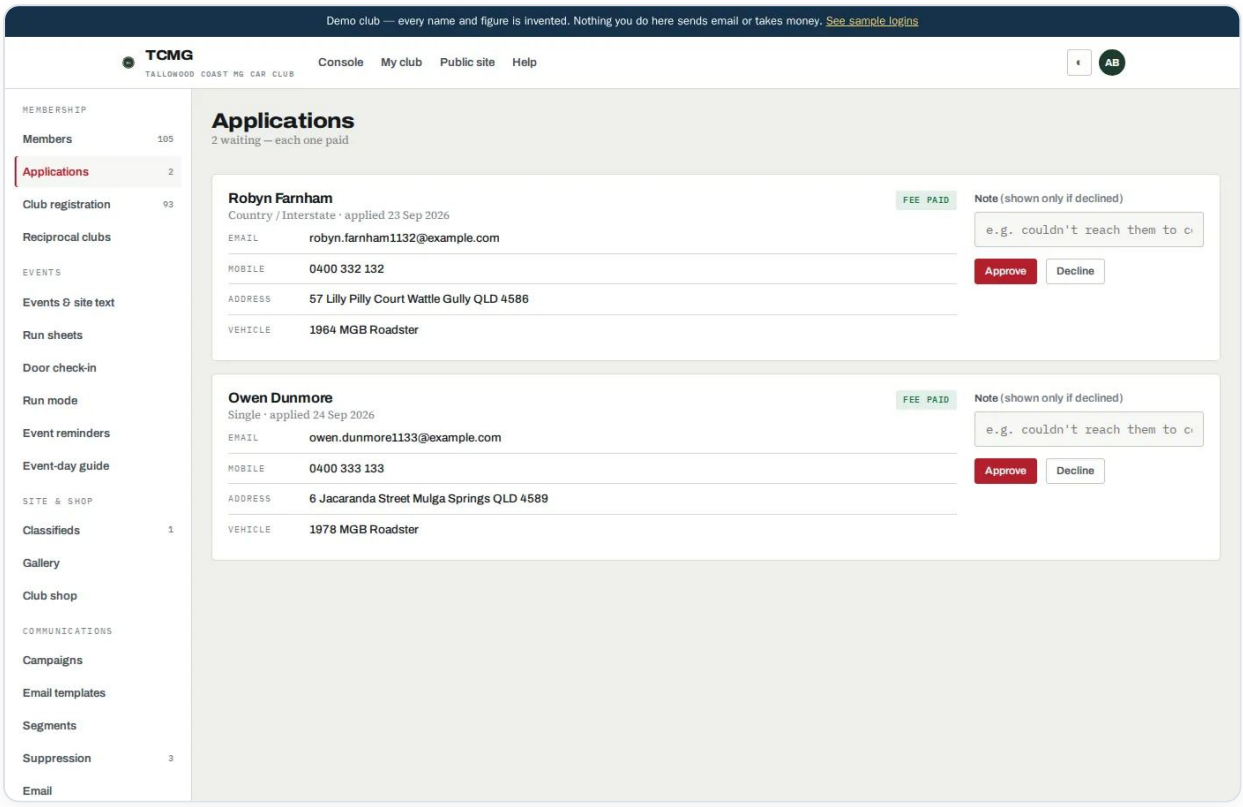
1. Open the member and press **Record payment**.
2. Check the amount, choose the **Method** (Cash, Bank transfer or EFTPOS at the meeting) and what it is **For**: **Renewal — extends a year**, **Joining fee** or **Something else**.
3. Press **Record**. A renewal moves the financial-to date on a year and the payment goes on the club's ledger with your name.

> Renewals open 60 days before a member's financial-to date. If you take money earlier than that, the form asks you to tick **Record anyway**, and the early renewal is noted in the audit log.

Members who chose to pay by direct deposit or at a meeting when renewing online wait under **Finance → Payments → Awaiting payment** until the Treasurer marks them paid.

Applications

Membership → Applications lists people who applied through the website's Join page: their category, contact details, address and car. The number in the sidebar says how many are waiting.



Applications waiting for a decision.

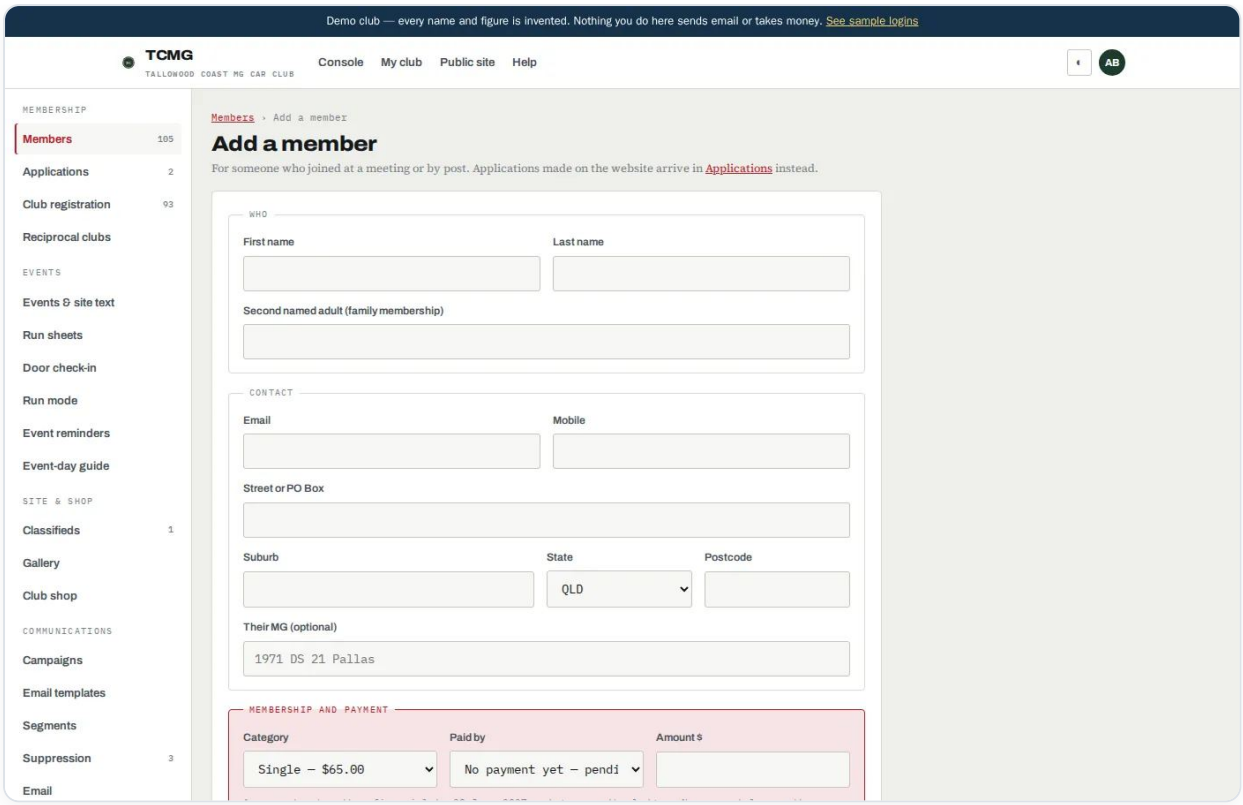
1. Read the application. **Fee paid** means the card payment went through when they applied.
2. Press **Approve**. They become financial to the end of the membership year and are emailed a link to choose a password. The link is also shown to you once, in case the email goes astray.
3. Or type a **Note** and press **Decline**. They are emailed with your note, and an unpaid joining fee comes off the awaiting-payment list.

> Declining does not refund a fee already paid by card. Tell the Treasurer, who refunds it through the club's card provider.

> If an applicant chose to pay by direct deposit or at a meeting and hasn't yet, the application says the fee isn't paid. You can still approve; the console asks you to confirm first.

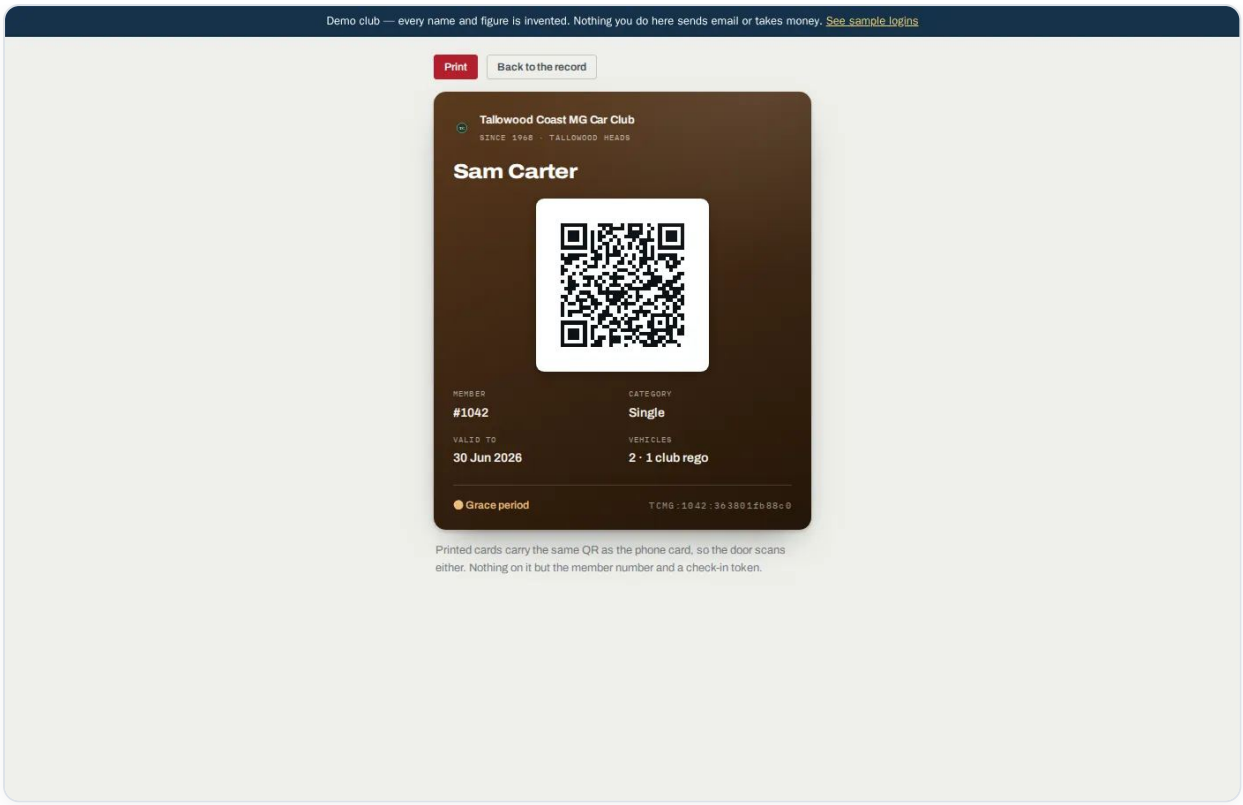
Adding a member at a meeting

For someone who joins at a meeting, a show or by post, use **Add member** on the member list.



Adding a member by hand.

1. Fill in their name (and the second named adult for a family membership), contact details and postal address. Their car is optional.
2. Choose the **Category**, then how they **Paid by**: Cash, Bank transfer, EFTPOS at the meeting, or **No payment yet**.
3. Press **Add member**. A payment makes them financial to the end of the membership year and goes on the ledger; no payment leaves them pending, like a website application.
4. Open their record and press **Print card** if they want a card on the spot.



The printed card carries the same check-in code as the one on the member's phone.

A new member with an email address gets a one-time link to choose their password. If the email doesn't arrive, open their record and press **Send sign-in link**.

Renewals, the grace period and lapsed members

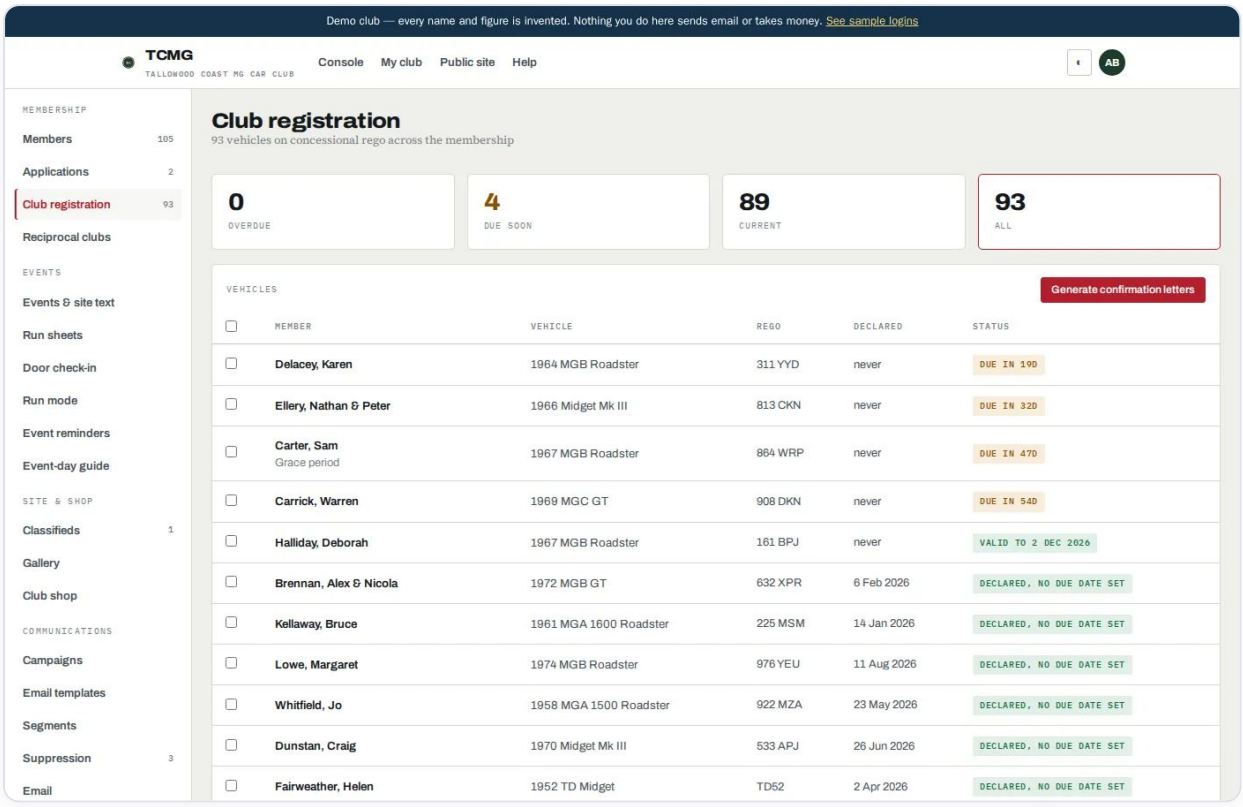
Every membership runs to the end of the club's membership year, set in **Setup & branding**. Members can renew online from 60 days before that date; the site reminds them on their phone and by email at 30, 14 and 3 days out, and members with auto-renew on are charged automatically.

- **Grace period** — a member who hasn't renewed by their financial-to date stays on as *in grace* until the grace-period end date the club has set. They can still come to events and renew straight away. The **In grace** tile shows how long is left.
- **Lapsed** — after the grace period, a member who still hasn't renewed is lapsed. Change their **Status** in the committee-only section when the committee decides they have gone.
- **Life members** never expire and never pay.

> The **In grace** and **Lapsed** segments under Communications are ready-made lists for a renewal reminder.

Club registration

Membership → Club registration is the concessional (historic or club) registration roster: every vehicle on it, whether its annual declaration is overdue, due soon or current, and when it was last declared. Members submit their declaration from their own My club page.

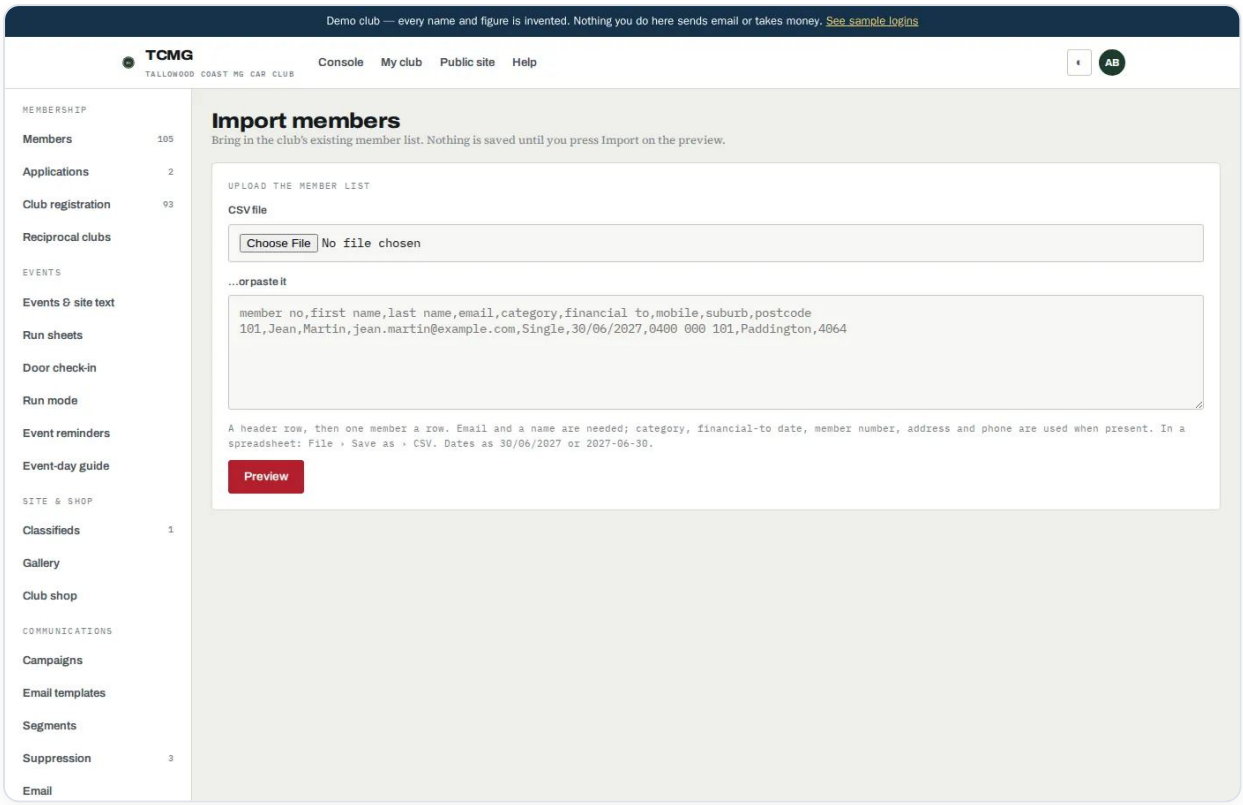


The club-registration roster, most urgent first.

1. Use the tiles to show **Overdue**, **Due soon**, **Current** or **All**.
2. Tick the vehicles that need a confirmation letter for the registry.
3. Press **Generate confirmation letters** and print the batch.

Importing members

Club → Import members brings in an existing member list from a spreadsheet. Nothing is saved until you have seen a preview.



Importing a member list.

1. Save the list from the spreadsheet as CSV (File → Save as → CSV): a header row, then one member a row. Email and a name are needed; category, financial-to date, member number, address and phone are used when present. Dates as 30/06/2027 or 2027-06-30.
2. Choose the file (or paste it) and press **Preview**.
3. Check the preview, then press **Import**. Importing emails nobody.
4. Review the new members on the member list before anyone is contacted.

> Importing is usually a one-off when a club moves across. Getting started with EzyClub covers it as part of setting up.

Sending set-up links

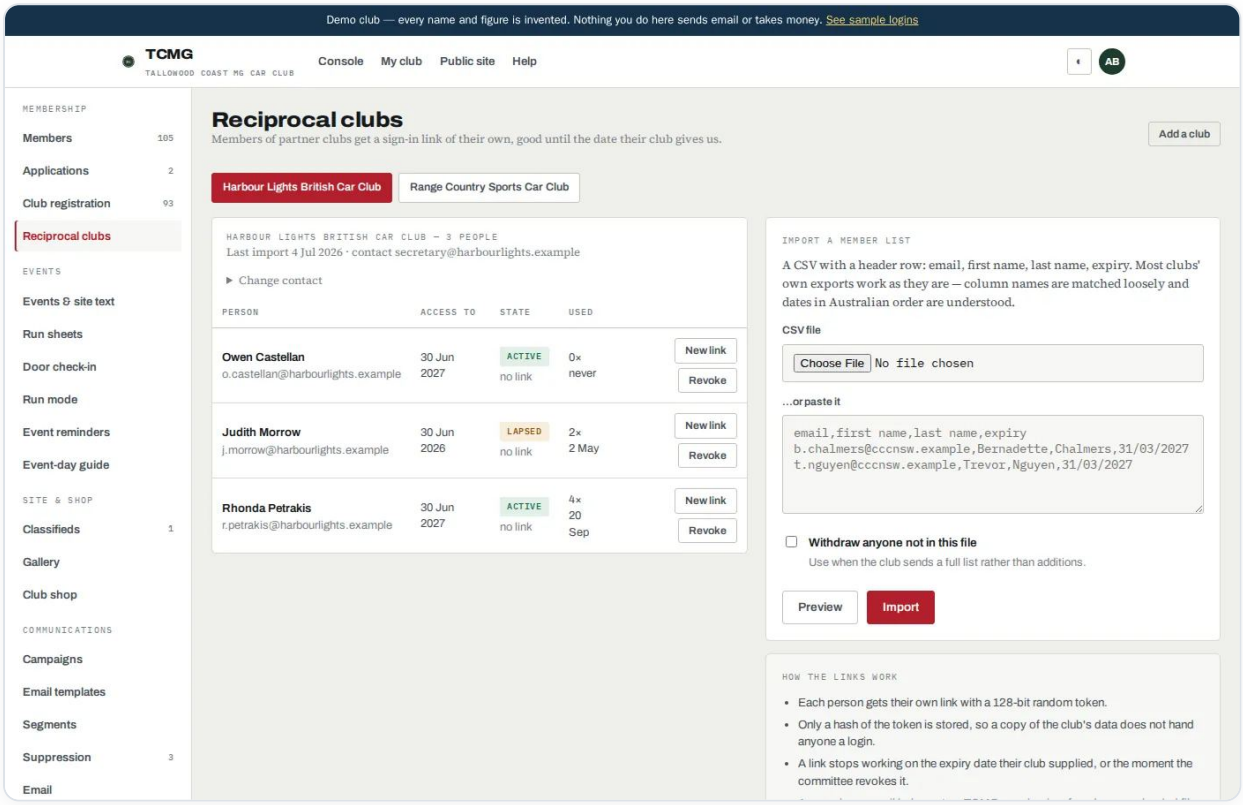
Members who have never signed in have no password yet. A set-up link lets each one choose a password. Sending them is a separate step from importing, so the list can be checked first and the links go only once email is live.

1. Open the member list (or **Import members**). A panel, **Members who have never signed in**, shows how many there are and what mode email is in.
2. If it says email is not live, stop: in test mode the links go to the test inboxes, not the members. Ask whoever holds Club settings to switch email to live first.
3. Press **Send set-up links to the next 100**. Press again for the next 100 until none are left.

Nobody is sent a second link within a day, members without an email address are listed so they can be added, and each send is recorded in the audit log. A link lasts seven days; after that, **Send sign-in link** on the member's record sends a fresh one.

Reciprocal clubs

Members of partner clubs can have a sign-in of their own that lets them see the library, events, classifieds, gallery and shop — never the members' directory, member records or the console. Each person's access lasts until the expiry date their own club gives.



A partner club and its people.

1. **Add a club**: its name and the secretary's email. Do this only after both committees have agreed.
2. Under **Import a member list**, choose the partner club's CSV (email, first name, last name, expiry — most clubs' own exports work as they are), press **Preview**, then **Import**. Tick **Withdraw anyone not in this file** when the club sends a full list rather than additions.
3. Each person gets a link, shown once. Send it to them.

New link replaces someone's link (the old one stops working); **Revoke** stops it at once. A row whose email belongs to one of your club's own members is refused, so an imported file can never open a real member's account.

Exports and the audit log

- **Export CSV** on the member list downloads the roster — for a mailing house, the AGM roll or the club's own records. Keep it somewhere safe: it holds personal details.

- **Finance → Audit log** records who changed what and when: approvals, role changes, payments and imports. Search it when someone asks “who changed this?”.

Quick answers

If…	Then…
A member has forgotten their password	Open their record and press **Send sign-in link**, or ask them to use **Forgotten your password?** on the sign-in page.
A member can’t renew online	Renewals open 60 days before their financial-to date; the renewal page says when. To take money earlier, use **Record payment** and tick **Record anyway**.
A member paid by bank transfer	If they renewed online choosing direct deposit, the Treasurer marks it paid under **Payments → Awaiting payment**. Otherwise use **Record payment** on their record.
Someone’s email keeps bouncing	Use the **Bounced email** chip to find them, ring them for the right address, and fix it on their record.
You can’t change a member’s roles	That needs the Roles role. See Roles and access.