



## **INSTRUCTIONS FOR CONFERENCE ORGANISERS**

### **HOW TO ACCESS THE BIRDS NZ CONFERENCE DATABASE**

Updated December 2024

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## 1) Introduction

Access to the Birds NZ Conference database is via a login to MembershipWorks.com (MW), the company who owns and supports the basic functionality of the database.

This MW database is the Membership and Conference part of the Birds NZ website and is maintained by the membership secretary for members' information, and by the conference organiser for the annual Birds NZ conference.

## 2) How To Access The System And Sign In

Figure 1 shows the screen that you will use to 'Sign In' with when you access MW. Click on this link <https://membershipworks.com/admin/> to sign in.

**Figure 1**

Your Sign In details are as follows:

**Email:** conference@birdsanz.org.nz

**Password:** Email [web.support@birdsanz.org.nz](mailto:web.support@birdsanz.org.nz) for you new password

### 3) Select The Current Year's NZ Bird Conference From The Event List

Figure 2 shows the screen that you will see when you click on the '[Event List](#)' menu item.



**Figure 2**

The event list has 3 main columns: the date of the event, number of tickets sold and the name of the event.

Click on the current year's **NZ Bird Conference** item to go to the '[Dashboard](#)' for the event.

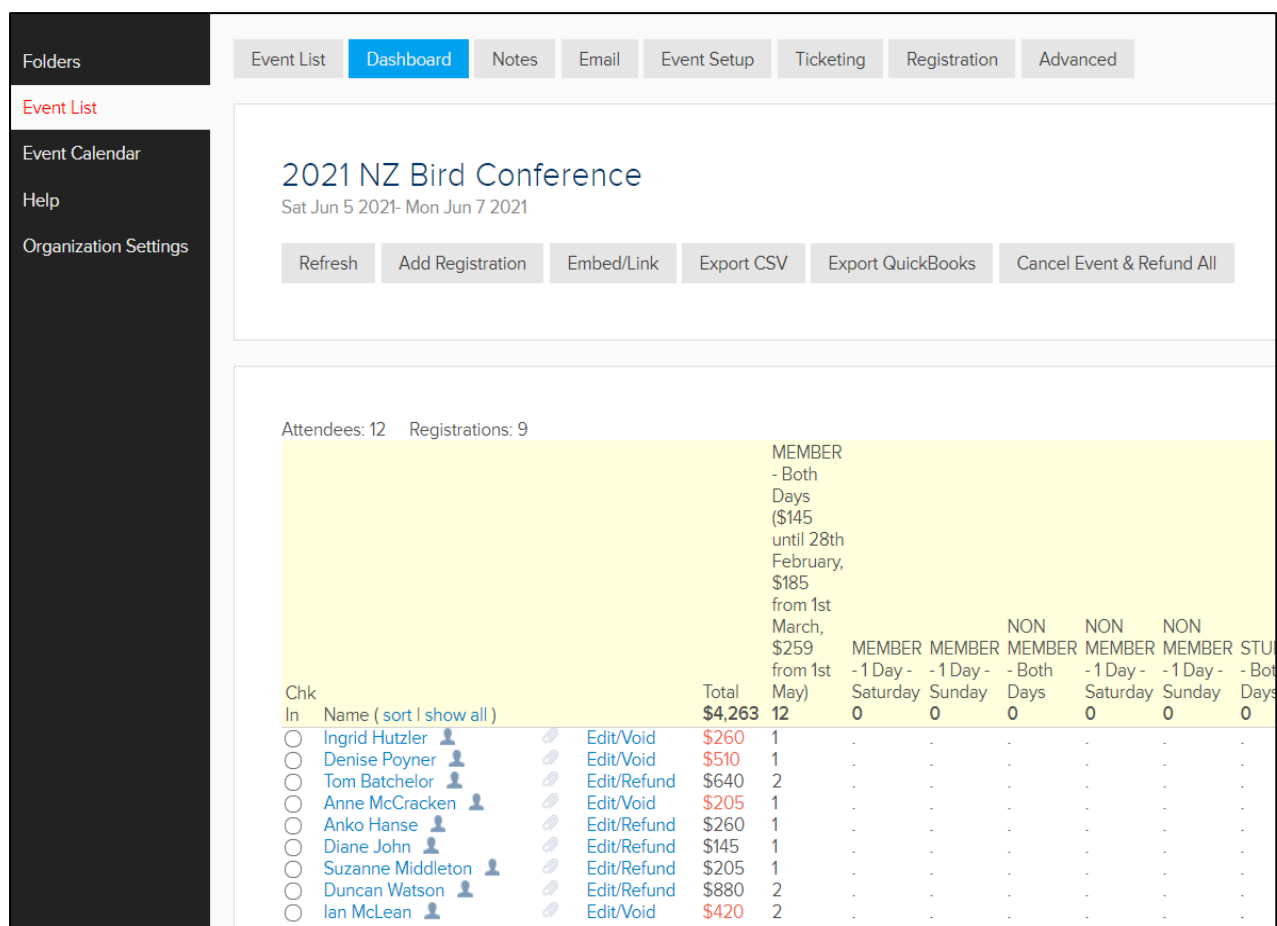
**Note: DO NOT** select any of the other items across the top of the screen as these are for setting up the other events.

#### 4) Viewing The Conference Registration Tabs

Figure 3 shows the Dashboard screen that you will see when you click on the current year's **NZ Bird Conference** item.

**Note:** The only the tabs you should select from across the top of the screen are 'Dashboard', 'Notes' and 'Email'.

You can also use the buttons 'Refresh', 'Add Registration' and 'Export CSV'.



**Figure 3**

### a. Dashboard

The Dashboard gives you an overview of the registrations and their current status. Go to the, '**Link to the MembershipWorks event Help file**', section at the end of this document to view further information about the Dashboard and how to use it to manage the attendees' information.

*i) How do I hide the 'Voided' registrations?*

On the event Dashboard, just above the names of the attendees, you will see the heading ‘**Name (sort | hide voided )**’ shown in Figure 4 or ‘**Name (sort | show all )**’ in Figure 3.

To hide the voided entries, just click on the 'hide voided' side of the heading and if you want to view the voided entries again, just click on 'show all'.

Attendees: 17		Registrations: 14					
						MEMBER - Both Days (\$145 until 28th February, \$185 from 1st March, \$259 from 1st May)	MEMBER - 1 Day - Saturday 0
Chk	In	Name ( sort   hide voided )		Total	\$5,738	16	0
<input type="radio"/>		Peter Ian Pay		Voided	-	-	-
<input type="radio"/>		Ingrid Hutzler		Voided	-	-	-
<input type="radio"/>		Ingrid Hutzler		Edit/Void	\$260	1	-
<input type="radio"/>		Peter Ian Pay		Voided	-	-	-
<input type="radio"/>		Test		Voided	-	-	-
<input type="radio"/>		Roger Sharp		Voided	\$50	-	-
<input type="radio"/>		Roger Sharp		Voided	\$50	-	-
<input type="radio"/>		Roger Sharp		Voided	-	-	-
<input type="radio"/>		Roger Sharp		Voided	-	-	-
<input type="radio"/>		Roger Sharp		Voided	-	-	-
<input type="radio"/>		Roger Sharp		Voided	-	-	-
<input type="radio"/>		Freddy Bloggs		Voided	-	-	-
<input type="radio"/>		fredy blogs		Voided	-	-	-
<input type="radio"/>		F bligs		Voided	-	-	-
<input type="radio"/>		RG Bliggs		Voided	\$78	-	-
<input type="radio"/>		df sharp		Voided	\$50	-	-
<input type="radio"/>		Denise Powner		Edit/Void	\$510	1	-

**Figure 4**

**ii) How do I manually add attendees?**

From the event Dashboard, click on the 'Add Registration' button. This will display the screen shown in Figure 5.

Select the appropriate item(s) that the person wants to attend (change the number of attendees where required). Add their name, address etc and any names and/or requirements. Make sure that 'Send registration confirmation email' is checked and then click on 'Add Registration'.

FIELD TRIP 5 - Coromandel bus trip - Opoutere	\$75	▼
FIELD TRIP 6 - Tairua to Tapu	\$95	▼
FLEDGLING FUND (optional) - Donation for student presentations	\$20	▼

Full name

Address

City, state/province, postal code

Phone

Email

Name(s) of additional attendee(s)

Please specify any special dietary and/or access requirements

If transport is required, indicate pick up location

I would like to give a poster

- ▼

I would like to give a paper

- ▼

☒ Send registration confirmation email

**Figure 5**

### *iii) How do I Check-In Registrants at an Event?*

Click on the circle under 'Chk In' next to the registrant's name to check them in. If the registrant is a Birds NZ member, the check-in will be logged in their membership Timeline.

### *iv) How do I cancel a Registration and provide a refund?*

From the event Dashboard, click on 'Edit/Refund' on the registration line, then click on 'Void tickets & full refund'. A refund for the full amount will be processed through the credit card payment system and a cancellation email will be sent to the registrant.

### *v) How do I change tickets / process a partial refund?*

From the event Dashboard, click on 'Edit/Refund' next to the registration, then click on 'Edit Registration'. Here you can edit the registration information as well as change ticket quantities. As the admin, you can edit the sub-total and tax directly, to accommodate discounts, etc.

Make sure to edit these amounts after completing any changes to the tickets, as selecting tickets will re-calculate the sub-total and tax.

If the final amount is less than what was originally charged, a partial refund for the difference will be processed automatically.

**Note:** You cannot increase the amount from what was originally charged, since we no longer have access to the credit card information to bill the user. To add tickets and bill any additional amount, use '[Add Registration](#)' instead. See *Section 6* also.

vi) *How do I resend a Registration Confirmation or Payment Receipt Invoice to Registrant?*

From the event Dashboard, click on '[Edit/Refund](#)' on the registration line, then click on '[Edit Registration / Partial Refund](#)', Scroll to the bottom of the form and select '[Resend registration confirmation email](#)' or '[Resend payment receipt invoice](#)', then select '[Update Registration](#)', an email will be resent to the registrant. See 'Figure 5A'.

Phone	272748939
Email	eclectic75@hotmail.com
Please specify any special dietary and/or access requirements	
I would like to give a poster	-
I would like to give a paper	-

<input checked="" type="radio"/> Re-send registration confirmation email
<input type="radio"/> Re-send payment receipt/invoice

Name on card	Emileen Chan
Billing address	3B Frances Street, Manurewa,
	Auckland 1702, NZ

<a href="#">Update Registration</a>	<a href="#">Cancel</a>
-------------------------------------	------------------------

**Figure 5A**

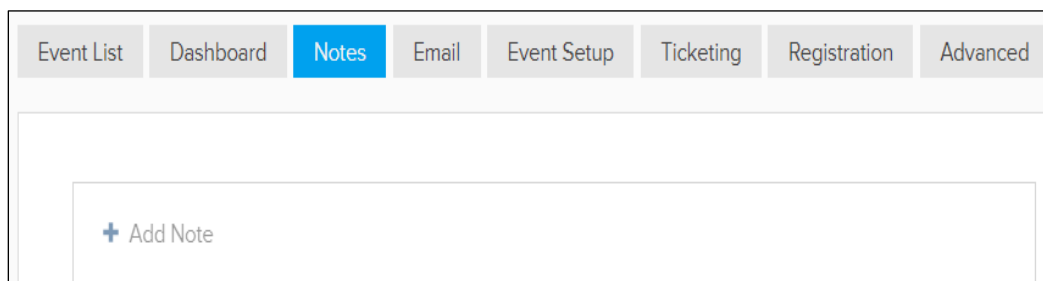


## b. Notes

### i) *Creating a note that applies to the whole conference*

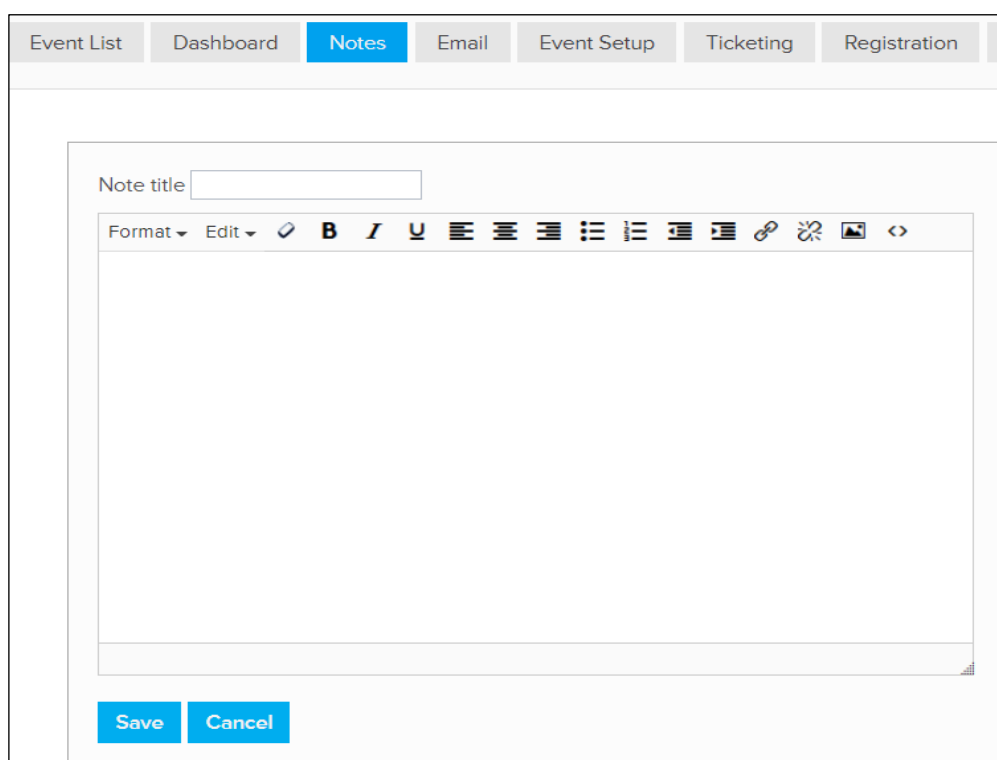
Figure 6 shows the Notes screen that you will see when you click on the 'Notes' tab at the top of the screen.

From there you can create notes about anything to do with the conference/attendees that you want to have as a reminder or note for the next AGM etc.



**Figure 6**

Figure 7 shows the box displayed after clicking on '+ Add Note'.



**Figure 7**

This Notes box will allow you to enter the title of and details about the note.

The text area allows for formatting of the text e.g. colour, bold, italics etc.

When you have completed writing your note, click 'Save' to keep your note or 'Cancel' if you do not want to save the note.

### ii) *Creating a note that applies to a single person*

To create a note for one person, click on the paper-clip icon alongside the 'Edit/Refund' option (Figure 3).

This will open a Note box that you can enter the notes into.

Click on 'Save' to keep the note.

## c. Email

### i) *Sending an email to all Registered people*

From the event click on the 'Email' tab, from there you can create an email that will be sent to everyone who registered for the event.

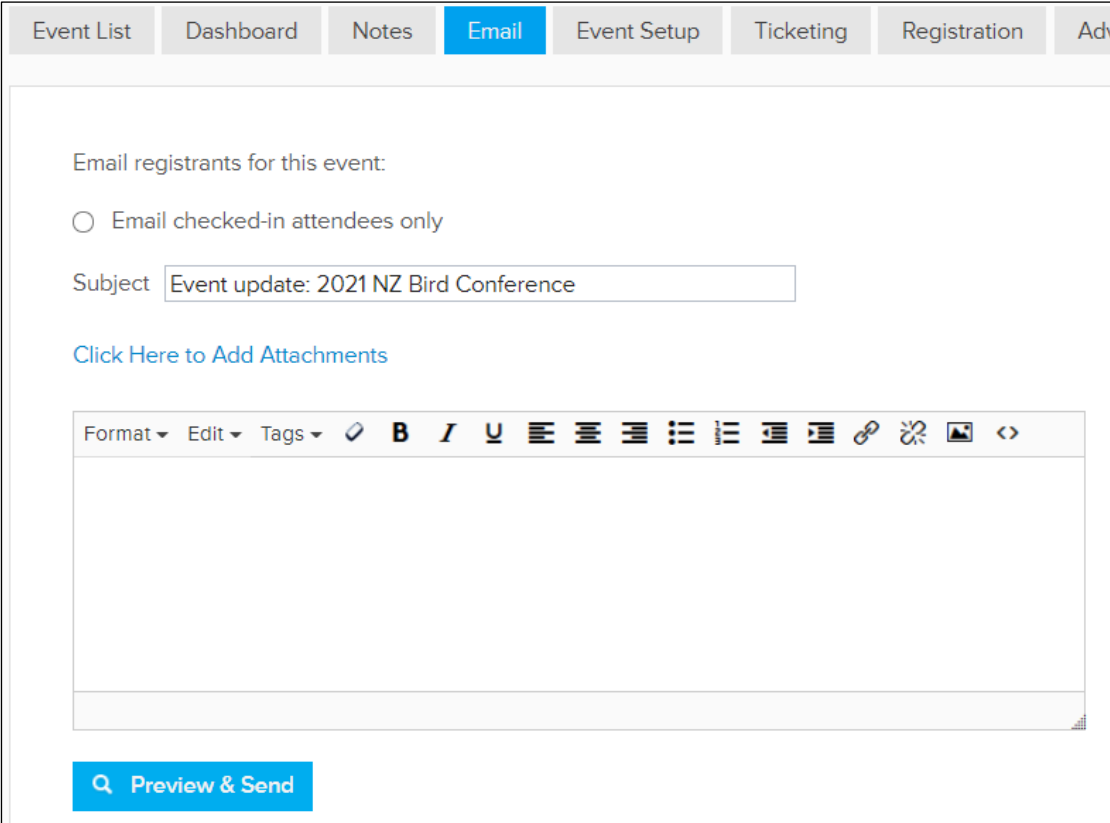
Figure 8 Shows the screen that has the options available for each email to be sent.

If you want to send the email to 'Checked-in attendees only', click on the circle.

Enter the subject you require and add any attachments as required. Write your message.

**Note:** you can use colours and text formatting in the email message. You can also add links to other information and images.

Click on the 'Preview & Send' button to send the email.



**Figure 8**

### ii) *Sending an email to one Registered person*

To send an email to one registrant, click on their name and your computer will open a new email with their email address in the 'To' line. Just complete email and send it as if it is a regular email sent from the conference email address.

## 5) How To View Attendee Registration Details (Incl 'Special Requirements')

From the 'Dashboard' ensure that the '(sort | hide voided )' heading is NOT showing, the '(sort | show all )' heading should be visible.

Select the 'Export CSV' button. This will display the information shown in Figure 9.

If you do not want to see all of the tickets, then untick the red circle alongside the tickets you DO NOT want to see information for.

The screenshot shows the 'NZ Bird Conference 2025' dashboard with tabs for Event List, Dashboard, Notes, Email, Event Setup, Ticketing, Registration, and Advanced. The 'Registration' tab is active. Below the event title, there are buttons for Refresh, Add Registration, Scan QR Code, Embed/Link, Export CSV, Export QuickBooks, and Cancel Event & Refund All. The main area displays 'Attendees: 9 Registrations: 9' and a search bar. A table lists attendees with columns for Chk, In, Name, Total, and various ticket types. A modal titled 'Registration data to include' is open, showing a list of registration options with red circles for selection.

Chk	In	Name	Total	MEMBER - Both Days (\$290 until 28 Feb, \$350 from 1 Mar)	MEMBER - 1 Day - Saturday (\$185)	MEMBER - 1 Day - Sunday (\$185)	NON MEMBER - Both Days	NON MEMBER - 1 Day - Saturday	NON MEMBER - 1 Day - Sunday	STUDENT/YOUNG BIRDER - Both Days	STUDENT/YOUNG BIRDER - 1 Day - Saturday	STUDENT - 1 Day - Sunday	INFORMAL DINNER - Saturday	INFORMAL DINNER GUEST - Saturday	CONFERENCE DINNER - Sunday	CONFERENCE DINNER GUEST - Sunday	FLEDGLING FUND - Donation for student presentations	FIELD TRIP 1 - Tawharanui Open Sanctuary	FIELD TRIP 2 - Hauraki Gulf Pelagic	FIELD TRIP 3 - Behind the Scenes at AKL Museum	FIELD TRIP 4 - Ambury Regional Park	FIELD TRIP 5 - Tiritiri Matanai Island (own transport to citv)
<input type="radio"/>		Martine Darrou	\$337	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		David Melville	\$438	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		Natalie Forsdick	\$478	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		Rachel Taylor	\$290	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		Chris Thompson	\$438	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		James Braund	\$468	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		Anita Spencer	\$320	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		Sahar Firoozkoobi	\$185	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.
<input type="radio"/>		Michael Szabo	\$375.50	1	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.	.

Figure 9

Click 'Export' to create a CSV file with the information for each attendee that has a ticket for at least one of selected items. Any 'Special Requirements' that the attendee has will be exported along with their ticket information (See Figure 10).

For example, if you want to get the details of people taking FIELD TRIP 1, then only have the circle alongside that ticket selected i.e. Red.



When you select the option to record the payment, the system automatically deducts the full amount from the amount outstanding and the payment amount alongside their name will turn black to indicate that you have received their money. This should automatically send a payment receipt to the person.

If the person has NOT paid the full amount, you should use the '[Edit registration](#)' option to alter the '[gross amount](#)' paid which will automatically calculate the amount '[owed](#)'. At the bottom of the '[Edit](#)' screen you will have to option to: '[Charge card for payment owed](#)', '[Re-send registration confirmation email](#)' and/or '[Re-send payment receipt/invoice](#)'.

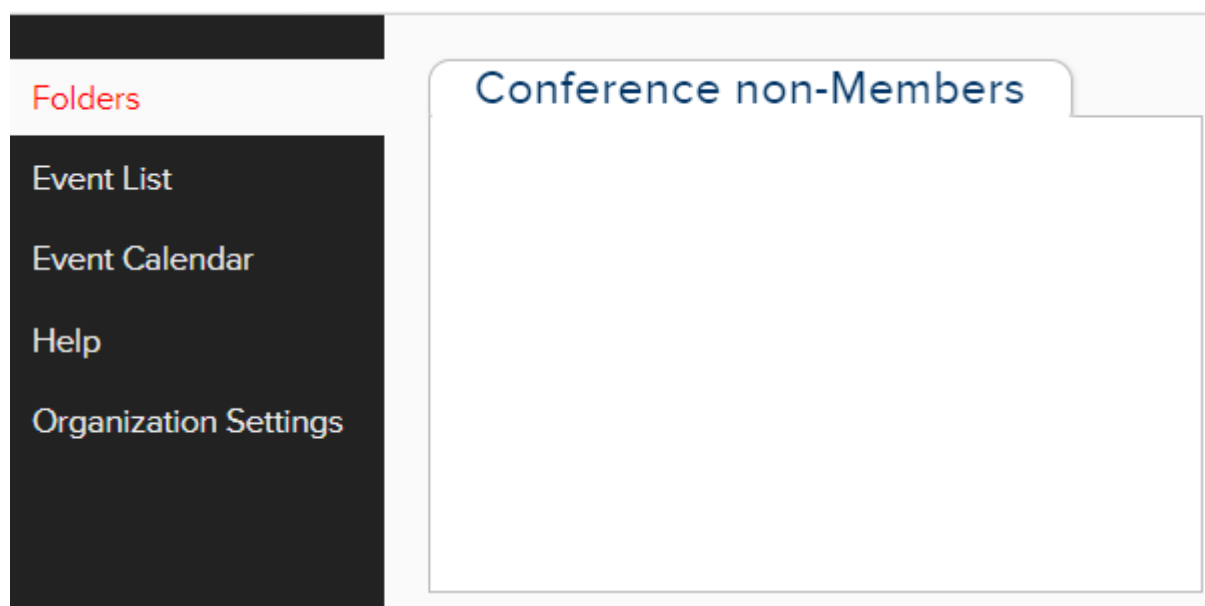
You can also use the '[Edit registration](#)' option to change an attendee's registration details such as their name/email details and/or the tickets they require.

## 7) List Of Standard Emails That Are Automatically Sent To Attendees

1. Event Registration payment receipt
2. Event Registration payment due email
3. Event Registration refund receipt

## 8) Folders

Figure 12 shows the screen that you will see when you have signed in.



**Figure 12**

If you click on the '[Conference non-Members](#)' folder, you will see a folder for each attendee who is NOT a current Birds NZ member. You can click on each of the attendees' folder to find out more details about the attendee.

## 9) Link To The Membershipworks Event Help File

Please click [\*MembershipWorks Help for Managing Your Event\*](#) for further information and a video about registration and management of attendees.

NOTE: You will need to logon to the Conference event before you can access this Help file.