INSTRUCTIONS FOR RR'S

TO ACCESS THE BIRDS NZ MEMBERSHIP DATABASE

UPDATED - 15 NOVEMBER 2025

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Introduction

Access to the Birds NZ 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 part of the Birds NZ website and is maintained by the membership secretary for members' information, and by the web support person and the Executive Officer for the structure of the data that is retained for each member and other things such as your *Sign In* details, membership levels and membership renewal notices etc.

Sign In

Figure 1 shows you the screen that you will use to *Sign In* with when you access MW. Click on this URL:- [*https://membershipworks.com/admin/*](https://membershipworks.com/admin/) to sign in.

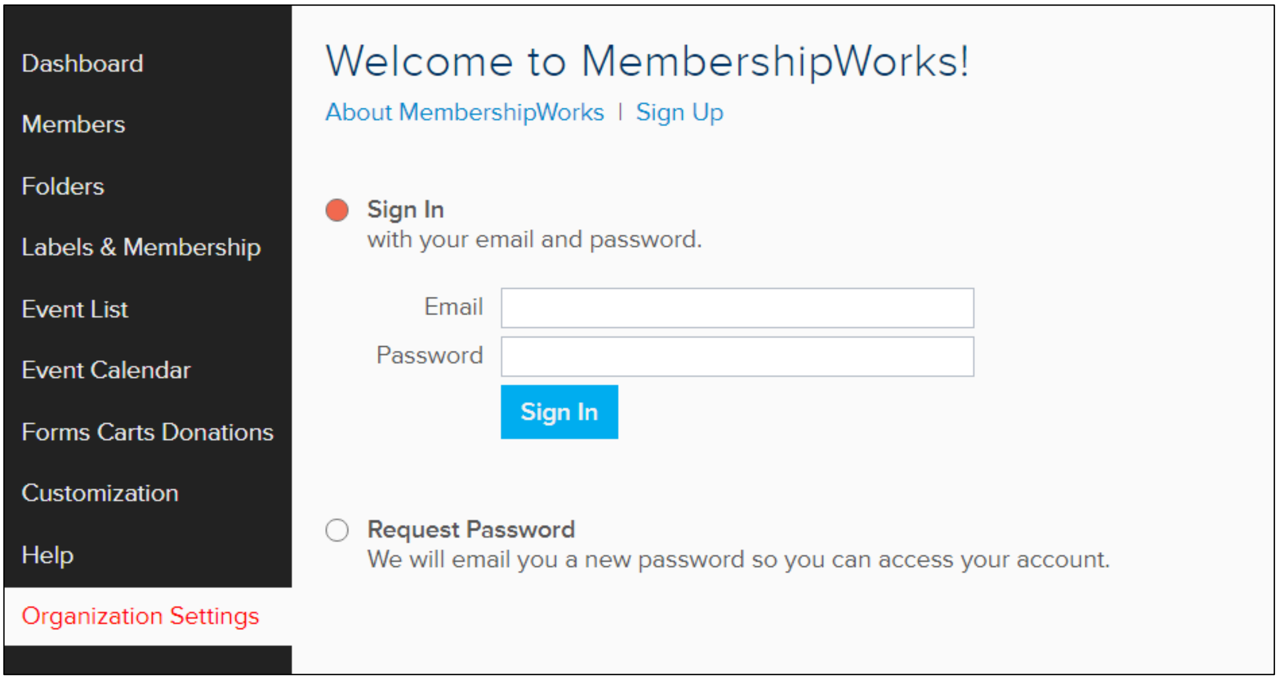

Figure 1

Note: Once you have Signed In, you will be able to change your password.

<u>From this point on you will only be able to see information about members in your region</u>.

Dashboard

Stats

Figures 2 and 3 below make up the statistical information, which is based on your *Sign In* privileges. By scrolling down this screen, you will see the information shown in both figures.

On the Stats page, the 'Total Accounts' and 'Memberships' column should be your main focus.

The 'Total Accounts' is the number of all members for your region, including those who <u>have not paid the subs</u>. Clicking on any of the information shown will provide more details. For example, clicking on 'Ordinary NZ' will give you a list of all members in your region in that category. To return to the dashboard, use the back arrow on the top left of your screen. The account groupings are explained at the end of this document.

Other member details are available under item 'Membership' which will be explained later.

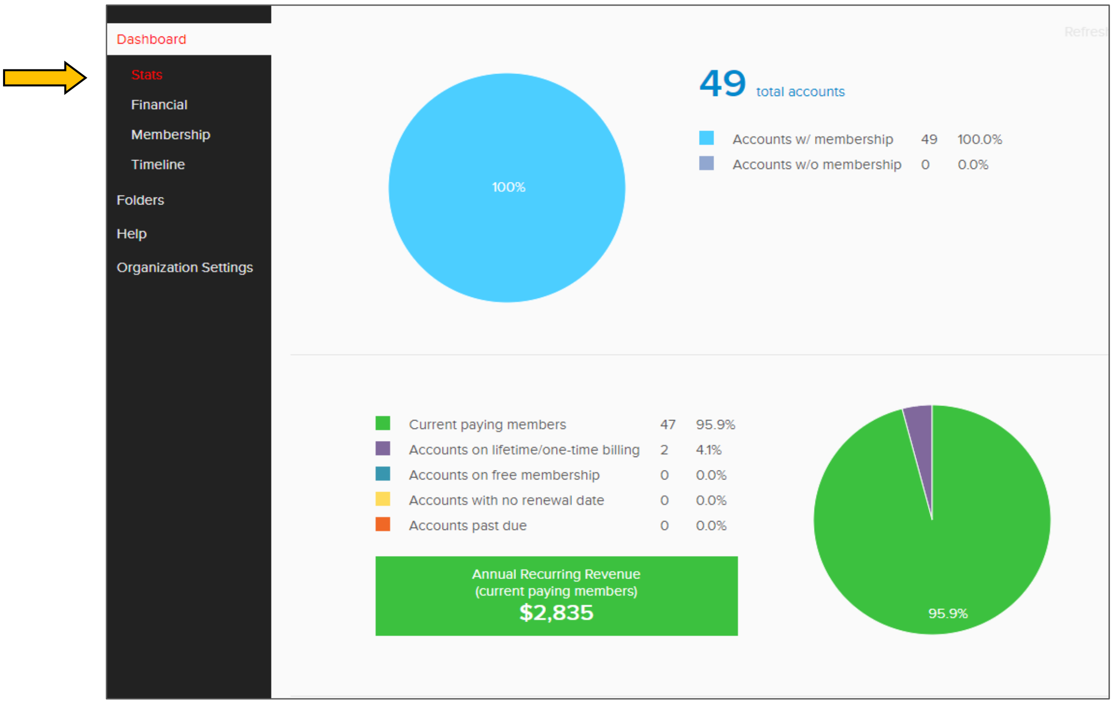

Figure 2

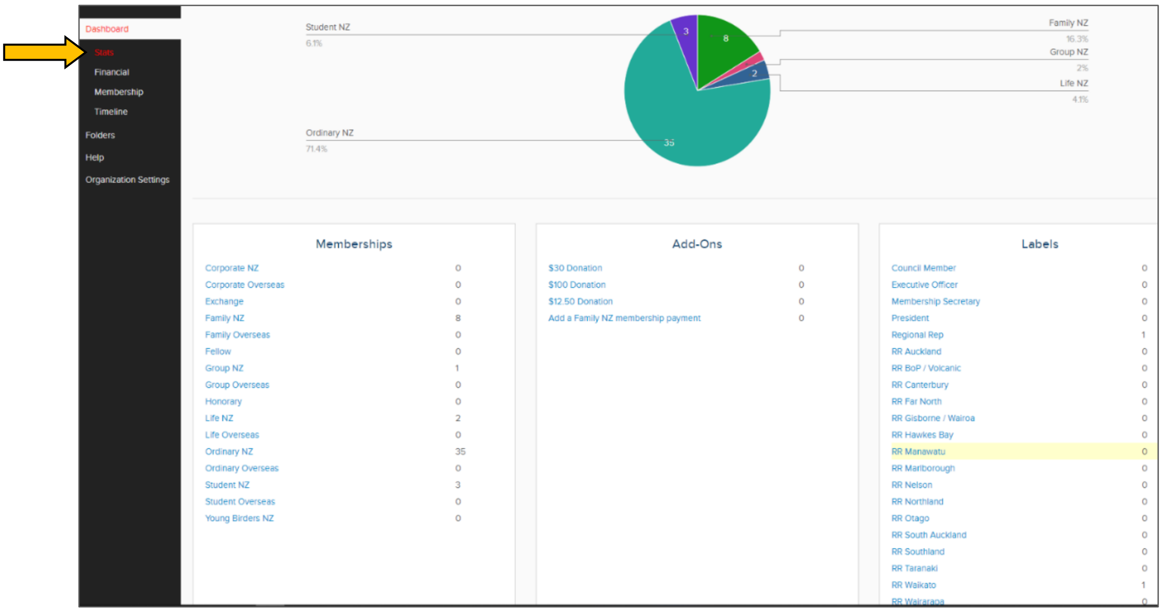

Figure 3

Clicking on 'Total accounts' brings up all members of your region, including those who haven't paid their subs, with each name displayed in their own box (Figure 4). You can export the members to a csv file or email them, if required.

There is a Search field that will accept any full or partial name that you would like to search for (Figure 4). You can select the member that you want to view and review their details and profile (Figure 5). Also see "Producing Reports" on page 9.

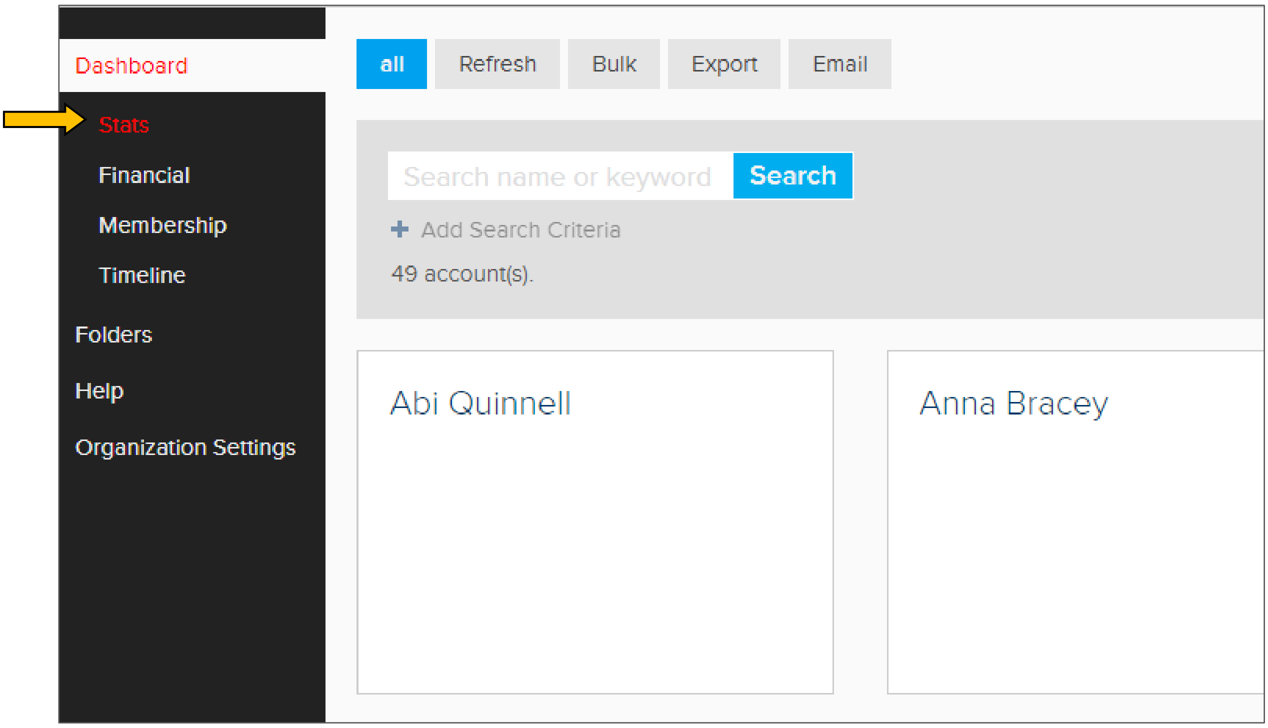

Figure 4

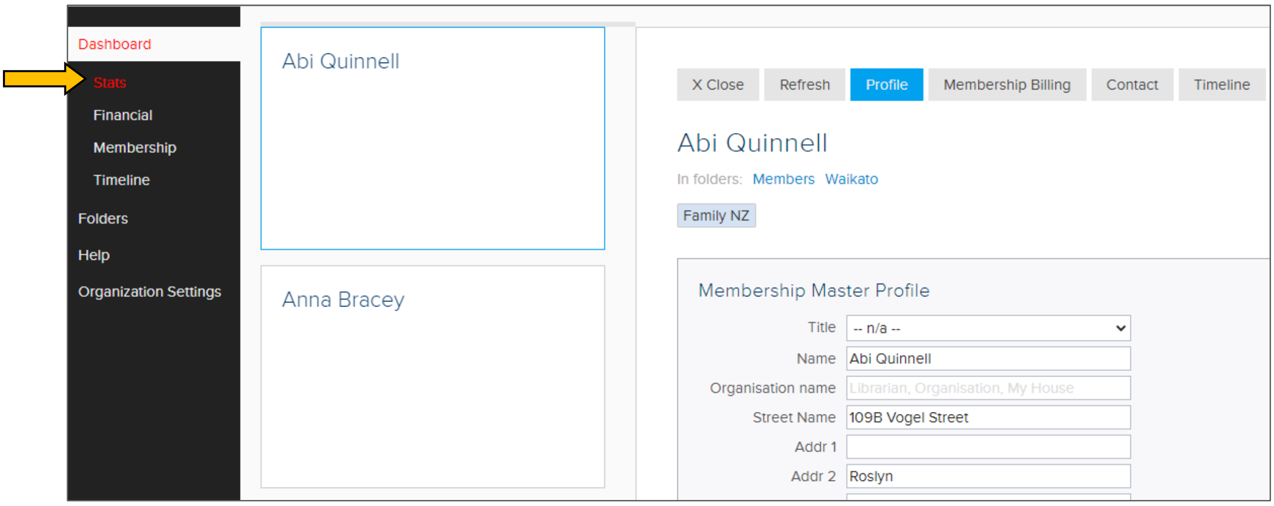

Figure 5

Note: you have 'READ ONLY ACCESS' to the members and cannot change any of their details. Only the member themselves, the membership secretary, web support and exec officer can change a member's details.

The member is limited in the fields that they can change, and the changes must be done through their login.

Financial

By changing the dates at the top of the screen, you can select different date ranges to display more detailed or more general financial information. Once you have selected the dates, click anywhere outside the date box to enter your request.

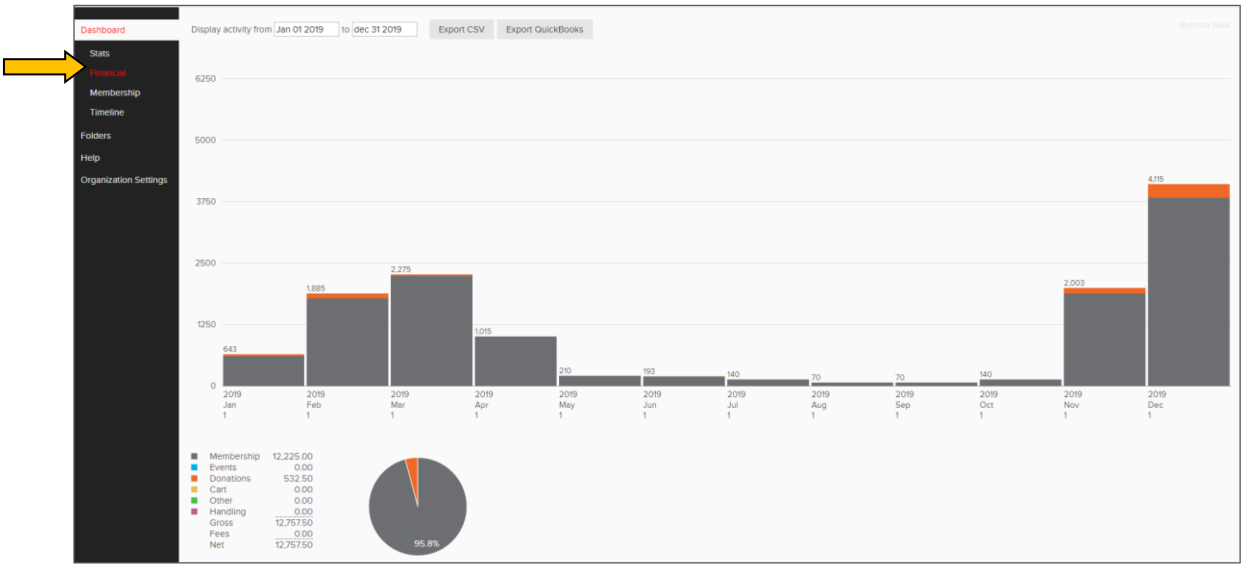

Figure 6

Shown in Figure 6 is 1 Jan 2019 to 31 Dec 2019 with fees in grey and donations in orange. If you move your mouse cursor over a column, the relevant detail for that column is displayed. If you click on a column, a pop-up window will appear with details. To close the window and return to the previous screen, click on the 'X' in the top right corner.

Membership

This gives a breakdown of membership positions as per Figure 7. By changing the dates at the top of the screen, you can select different ranges to display detailed membership information. Once you have selected the dates, click anywhere outside the date box to enter your request. It is suggested that you start the date sequence from 1 January, as a later date will exclude Past Due members.

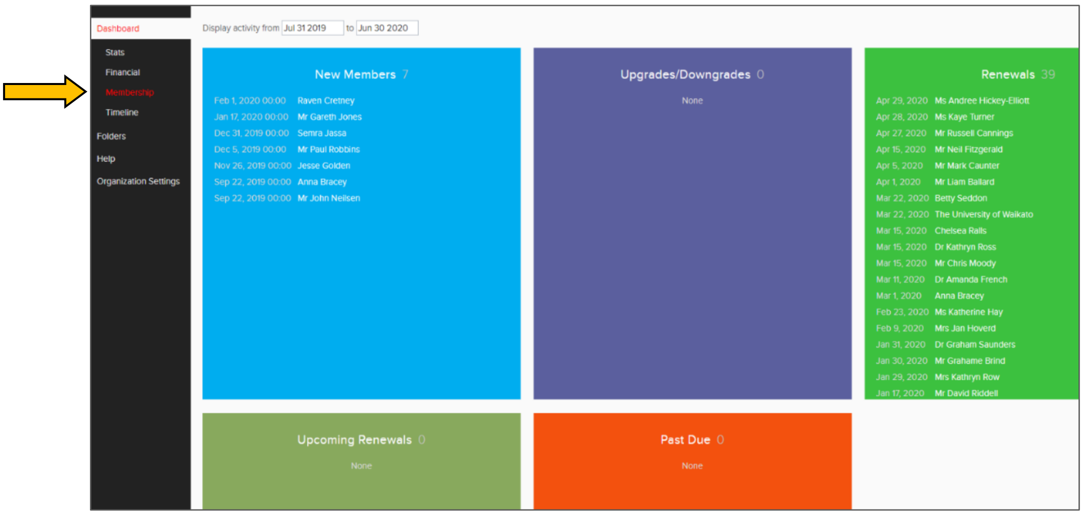

Figure 7

By clicking on a members' name, you can view specific information for that member (see Figure 5). Click on the section header to see all members in that section e.g. 'New Members'. To close this window, click on the 'X Close' tab.

Note: The section ‘Past Due’ refers to members who have not yet paid their subscription fee.

Timeline

This allows the selection of the members’ activities with a Filter. The selected data can then be exported to a CSV file for further processing.

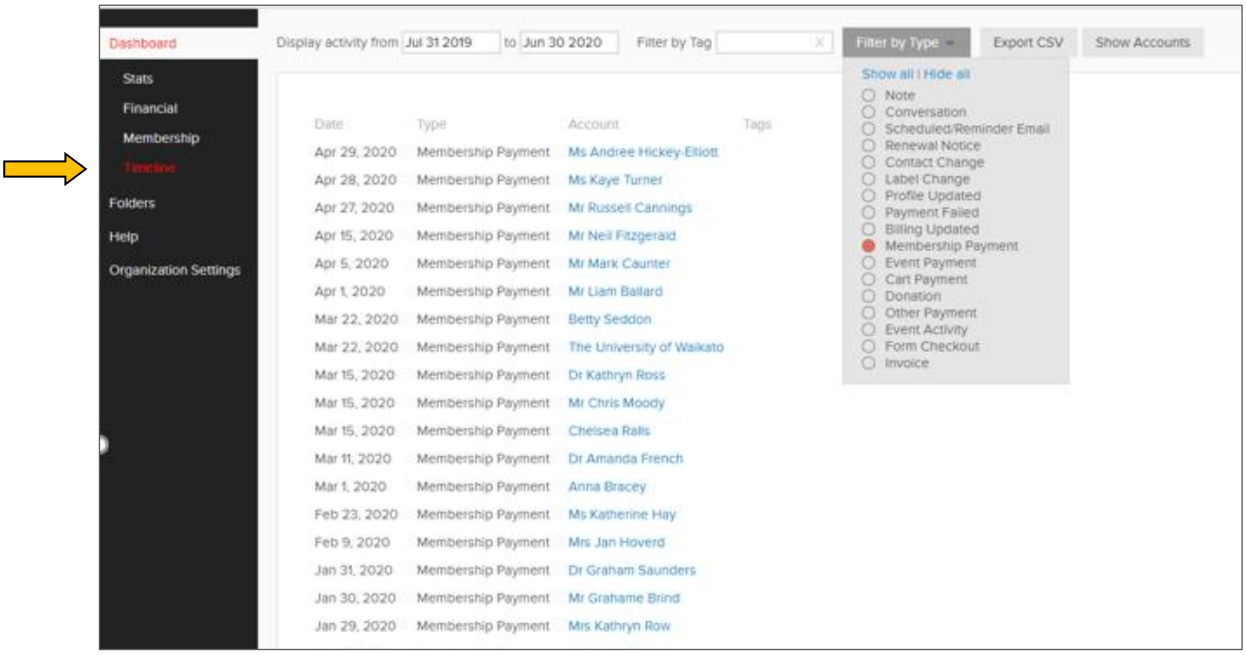

Figure 8

The example in Figure 8 shows a list of members who have paid their membership fees within the selected date range.

Folders

Figure 9 shows the folder matching your region. Clicking on the folder (in this case Waikato), will show all of your current members the same way that clicking on ‘Total accounts’ does (see Figures 4 & 5)

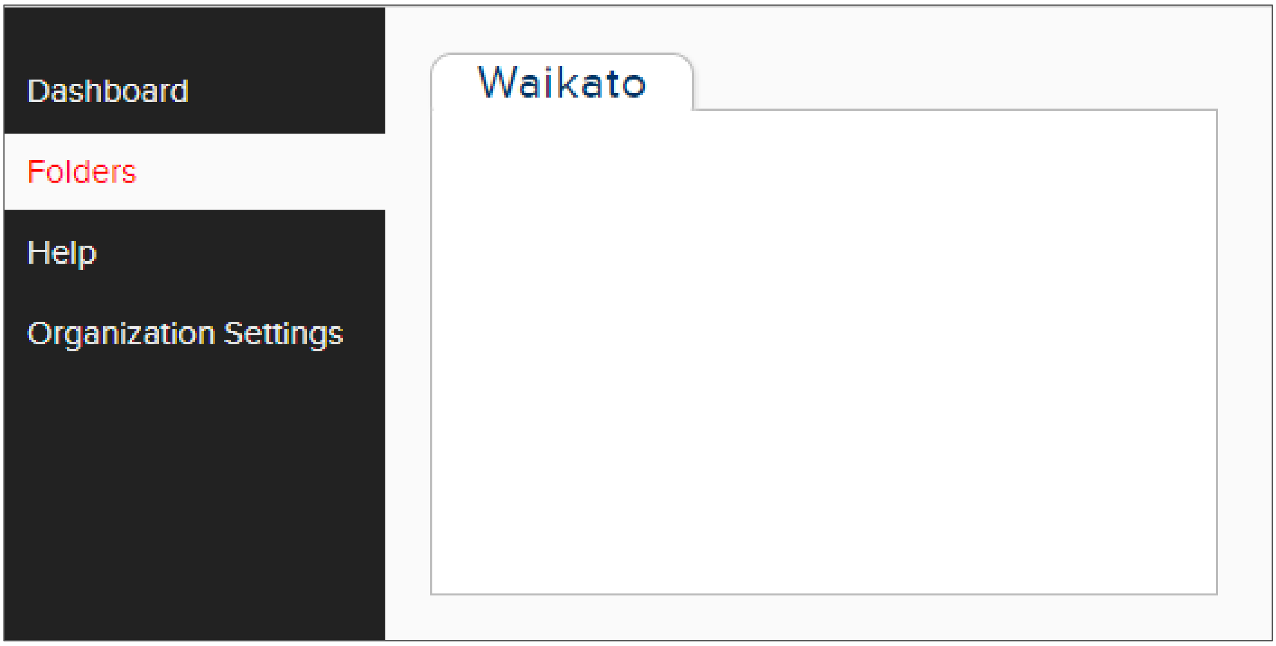

Figure 9

Help

Figure 10 lists the Topics that can provide Help on most subjects in MW.

However, most of the help information does not help what you are doing as it is aimed mainly at 'super' users.

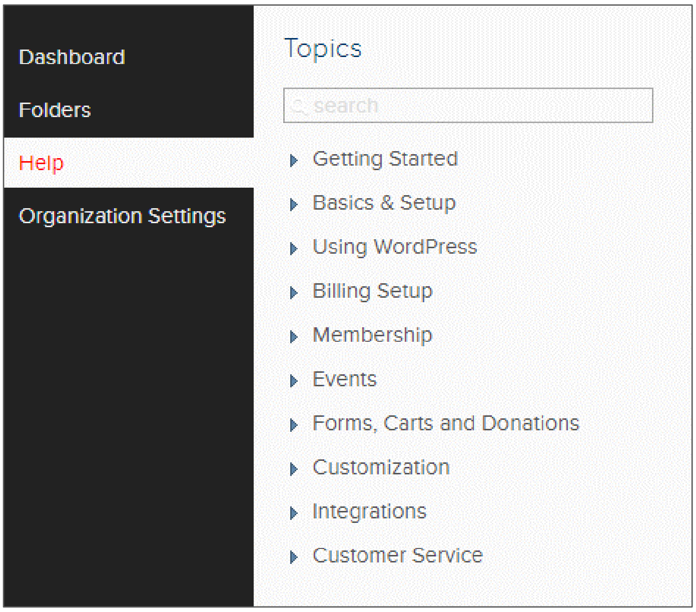

Figure 10

Organisation Settings

Figure 11 shows you your own details that you can modify, including your password, and to *Sign Out*.

PLEASE DO NOT CHANGE YOUR NAME, POSITION or EMAIL without talking to the Executive Office or Web Support person first as these have implications elsewhere in the system.

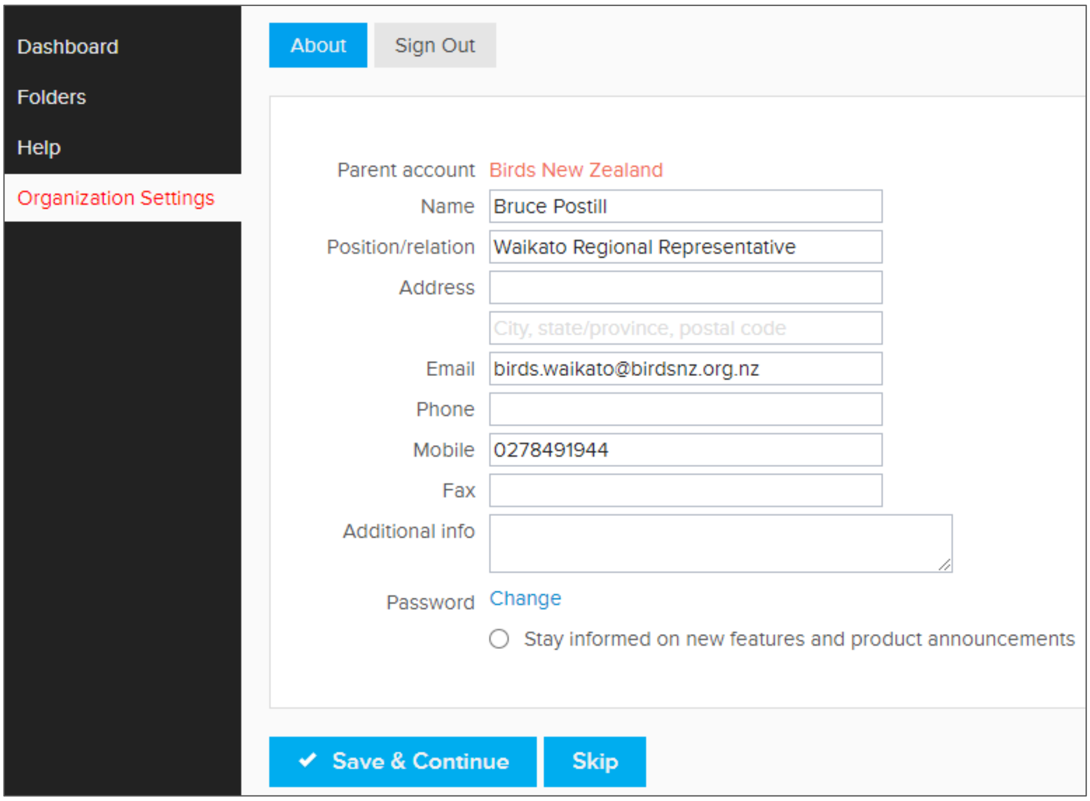

Figure 11

Producing Reports

At any stage, you can produce a list or spreadsheet of the data you are viewing in the **Dashboard**:

Examples:

- **All members in your region**
  In 'Stats', click on 'Total accounts', then follow the steps below.
- **New members**
  In 'Membership', click on the title of section 'New Members', then follow the steps below.
- **Past Due (grace) members**
  In 'Membership', click on the title of section 'Past Due', then follow the steps below.

To produce a spreadsheet, select the 'Export' tab. Then select the fields (e.g. name, email) you wish to include in your report, then scroll down and select 'Download'.

This will produce a CSV file, which you can save (CSV or XLS) on your computer.

Sending Emails

To send a message to all members in your region: In 'Stats', click on 'Current paying members', select the 'Email' tab, type your email and send it.

Account Groupings Explained

Account Groupings and what records are included:

- Accounts w/membership = All members except deceased
- Accounts w/o membership = Deceased
- Current paying members = All current members except Life, Exchange, Fellow and Honorary
- Accounts on lifetime billing = LifeTime
- Accounts on free membership = Exchange, Fellow, Honorary
- Accounts with no renewal date = If NOT zero, then report it to Membership Secretary
- Accounts past due = Not renewed since their final reminder notice