

Welcome to PastPerfect Video Tech Tips. This technical tip will cover how to designate a member as active or inactive within PastPerfect.

The ability to alter the active status for a member is important. Only active members will be included on the overdue lists, which will allow you to create reports or send membership notices to overdue members. If the contact is inactive, they will not be acknowledged on any of the overdue lists.

- To change the status of a member, from the Main Menu click on “Contacts” in the lower central portion of your screen.

Next, you will need to find the record for the contact to be changed. You may find this individual either by using “Browse” or “Find.”

- We will search for the contact using “Find.”

Within Find, you may locate this contact in multiple ways, for instance, if you know the ID number, or by last name. If you are searching by last name, and the contact’s last name is common within your database, you may wish to use Field Search instead of Instant Find. In this example we know that the ID number for the contact is 20, and so we will use Instant Find.

- We will select ID number from the dropdown list for “by Indexed Field.” After selecting ID number, the “begins with” field will have a highlighted entry, which will allow us to automatically type within the field. We will type 20 and then click on the button “Find Now.”
- Now that we have found the desired contact, we will click the “Membership” button so that we can see the membership information.
- Next, we will click the “Edit” button at the top of the screen, located between “Browse” and “Find.” This will allow us to make changes to the membership information.

Within the membership section, you will see the phrase, “Include on Overdue List” in the bottom central portion of your PastPerfect screen. If “Yes” is selected, they are Active, and so will be included on any of the overdue reports and lists. If “No” is selected, they are Inactive and will not be included on the overdue reports and lists. It is important to note that, if your contact is a Life Member, “Yes” should still be indicated.

- In this example, we are making the member Inactive, so, we will click once on the radio button, or circle, in front of “No.”
- Finally, we will click the “Save” button at the top of the Contact record. You will now see the black “Inactive” flag appear on their Membership screen. Please note: This flag is not related to whether a member is overdue and it will not appear if a member is Active.
- When finished, please select the “Exit” button from the upper, central portion of the screen to return to the Main Menu.

To quickly view the number of people who are Active or Inactive, you may go to Lists & Labels by clicking on that button from the Main Menu. Please note, your Active and Inactive membership lists are located under fixed lists, near the bottom of that column. You may also

wish to note your Memberships Overdue fixed list. To be placed on this list, the contact must meet a few criteria. Namely, they must be the billing member for the membership, they are overdue, and "Include on Overdue List" must be set to "Yes," in other words, they must be active. When finished viewing your lists, please click the "Exit" button on the lower right portion of your screen, to return to the Main Menu.

If you have any questions regarding how to designate a member as active or inactive within PastPerfect, please contact our support office at 1-800-562-6080, toll free or email us at support@museumsoftware.com.