FAQ | Membership Administration
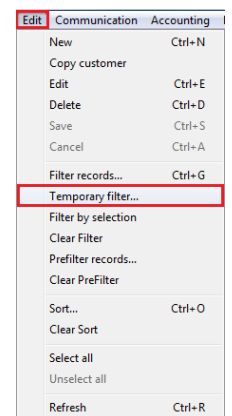
Create a Temporary Filter

1. On the menu bar, click on "Edit" and select "Temporary filter" from the list.

2. A new window will appear. Insert a name for your filter at the top (in our example, we will name it "Pensioners"), then select the value/s you want to use for the filter (in this case only "Birthdate") from the list below.

3. You will then see new information on the right-hand side of the screen where you have to specify the range or value you want to include. (**In this example**, you want to filter all pensioners, which is why you include members with a date of birth on or before 1951. You select a "Starting rage" of (inclusive) 1900/01/01 (earliest date of birth any member is likely to have) and an "Ending range" of 1951/01/01.)

4. Click on the "Add" button in the middle to add the condition of the filter. Click on "Save" and "OK". Now only members with a date of birth in this range will be displayed (which means that they can be moved to the pensioners member type if that was the purpose of this exercise).