

How to find Current Members of your Club

TidyHQ Report



To start this process, please ensure the following:

- You are an Active AusCycling Member and currently a Committee Member of your Club.
- Your Club has been given access to your Club's TidyHQ account.

To do this, please see below:

1. Have a Committee Member of your Club log into your Club's TidyHQ.
2. Go to **'Admins & Roles'** which will be on the left-hand side of their Club's Dashboard login.
3. In the right-hand corner of their screen, there is a button **'+Invite Admin'**. Click on this and have them enter your Email Address and provide the **'Permissions'** that you require. Note: For this report, you will require access to **'Contacts'**.
4. Click on **'Invite'** at the bottom and an email will be sent to the email address.
5. Check your email inbox and you should receive this email.
6. In the email, there will be a link for your Club, like the image highlighted.



HOT TIP

Save this URL link to your **'Favourites'** within your internet browser for easy access.

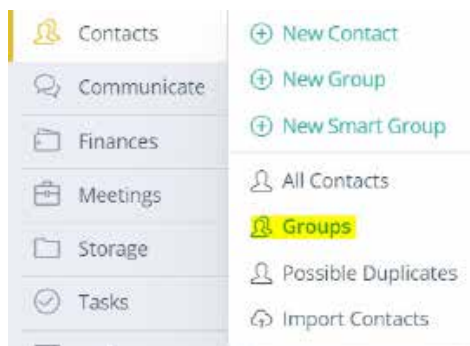
A password may be required to be created or you may be able to use your password already used under TidyHQ.

This covers the requirements needed to start your Current Members of your Club Report.



Please follow the steps below to access your report:

1. Go to your Club's Link and login. If you have any troubles logging in, you can click on **'Forgotten Password'** or you can contact the AusCycling Member Services Team.
2. When you have logged in to your Club's TidyHQ, you will first arrive at the **'Dashboard'** of your Club.
3. Hover your mouse icon over the word 'Contacts' on the left-hand side of your screen and select **'Groups'**. Screenshot below shows the option to select:



4. This will take you to your Club's Groups. The **'Managed'** groups have been created with both AusCycling/TidyHQ Teams to assist Club Committees with reporting. Screenshot below shows an example of the **'Managed'** groups that have been created:



5. Click on **‘Current Members of your Club’** (Smart + Managed). This will take you to smart group.

HOTTIP

Before your next step:

Go to **‘Actions’** on your screen and select **‘Refresh Smart Group’**.

This will refresh your group with the accurate information (normally takes 2-3 minutes) and then you can refresh your page.

To check if this has refreshed and up to date, you will see the following:



6. Your Club’s group should now be updated. Now, click on icon **‘Displayed Fields’** – this looks like:

7. A Pop-Up box should appear on your Internet Browser with columns you will receive in your Export. AusCycling Member Services Team **recommends** the below fields to be ticked for your report:

Heading - ‘Default’:

- ID Number
- Email
- Phone
- First Name
- Last Name
- Gender
- Date of Birth
- Address (State)
- Emergency Contact
- Emergency Contact Number

Heading – ‘Membership’:

- Membership Level
- Subscription Status
- Subscription Start Date
- Subscription End Date
- Subscription Variations

Heading – ‘Shared Custom’:

- Suspension Start Date
- Suspension End Date
- Suspension Reason

Note: This report is only for Current/Active Members of your Club. There will be further documents to assist with other reports.



Screenshots of the 'Displayed Fields':

Displayed Attributes

Default

- | | | | |
|---|--|---|--|
| <input type="checkbox"/> Contact | <input type="checkbox"/> Private phone | <input checked="" type="checkbox"/> First Name | <input type="checkbox"/> Address (Postcode) |
| <input type="checkbox"/> Created | <input type="checkbox"/> Mobile phone | <input checked="" type="checkbox"/> Last Name | <input type="checkbox"/> Address (Country) |
| <input checked="" type="checkbox"/> ID Number | <input type="checkbox"/> Fax phone | <input type="checkbox"/> Nickname | <input type="checkbox"/> Occupation |
| <input checked="" type="checkbox"/> Email | <input type="checkbox"/> Pager phone | <input checked="" type="checkbox"/> Gender | <input checked="" type="checkbox"/> Emergency Contact |
| <input checked="" type="checkbox"/> Phone | <input type="checkbox"/> Skype phone | <input checked="" type="checkbox"/> Date of Birth | <input checked="" type="checkbox"/> Emergency Contact Number |
| <input type="checkbox"/> Work phone | <input type="checkbox"/> Other phone | <input type="checkbox"/> Address (Street) | <input type="checkbox"/> Member Since |
| <input type="checkbox"/> Home phone | <input type="checkbox"/> Shared | <input type="checkbox"/> Address (City) | <input type="checkbox"/> Unsubscribed? |
| <input type="checkbox"/> Business phone | <input type="checkbox"/> Other groups | <input checked="" type="checkbox"/> Address (State) | <input type="checkbox"/> Amount Owed |
| <input type="checkbox"/> Direct phone | <input type="checkbox"/> Company | | |

Card

- | | | | |
|--------------------------------------|---|--------------------------------------|--|
| <input type="checkbox"/> Card Type | <input type="checkbox"/> Card Ending in | <input type="checkbox"/> Card Status | <input type="checkbox"/> Card Added to Profile |
| <input type="checkbox"/> Card Expiry | <input type="checkbox"/> Card Payment Gateway | | |

Membership

- | | | | |
|--|---|---|---|
| <input checked="" type="checkbox"/> Membership Level | <input type="checkbox"/> Membership Start Date | <input checked="" type="checkbox"/> Subscription Status | <input type="checkbox"/> Subscription Is Renewal? |
| <input type="checkbox"/> Membership Status | <input type="checkbox"/> Membership End Date | <input checked="" type="checkbox"/> Subscription Start Date | <input type="checkbox"/> Subscription Is Latest? |
| <input type="checkbox"/> Membership ID | <input type="checkbox"/> Membership Auto-renew Status | <input checked="" type="checkbox"/> Subscription End Date | <input checked="" type="checkbox"/> Subscription Variations |
| <input type="checkbox"/> Membership ID Reference | <input type="checkbox"/> Subscription ID | | |

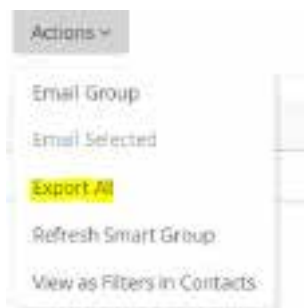
Shared Custom (AusCycling Test Club)

- | | | | |
|--|---|---|--|
| <input type="checkbox"/> ACE Administrator | <input type="checkbox"/> Grading - Road (Legacy, to be removed) | <input checked="" type="checkbox"/> Suspension End Date | <input type="checkbox"/> Coach Accreditation Level |
| <input type="checkbox"/> AUDAX Number | | <input checked="" type="checkbox"/> Suspension Reason | |

<input type="checkbox"/> Accreditation Certificate	<input type="checkbox"/> Parent/Guardian's Mobile Number	<input type="checkbox"/> Transponder ID #2	<input type="checkbox"/> Completion
<input type="checkbox"/> Para-Cycling Classification	<input type="checkbox"/> Parent/Guardian's consent confirmation	<input type="checkbox"/> Transponder ID #3	<input type="checkbox"/> STA Clean Sport 101 (file)
	<input type="checkbox"/> Do you have a referral code?	<input type="checkbox"/> Do you hold a current coach or official accreditation with BMMA or MTBA?	<input type="checkbox"/> How did you hear about us?
	<input checked="" type="checkbox"/> Suspension Start Date		<input type="checkbox"/> How did you hear about our 4 Week Free Trial?
			<input type="checkbox"/> How did you hear about our Non-Riding Membership?



- Once you have selected the **'Displayed Fields'** from the previous screenshots. Click **'Apply'** at the bottom of the pop-up box. This will now refresh and add the **'Displayed Fields'** as columns and are ready to be exported.
- To export, click on **'Actions'** and select **'Export All'**. Please see the below screenshot:



- A message will then appear shortly after clicking on **'Export All'** which says: "Your CSV is being generated and will be emailed to *INSERT YOUR EMAIL*. This can take up to an hour." Note: In most cases, it does arrive in your email inbox in timely manner.

HOT TIP

To reduce the number of times of selecting the 'Displayed Fields'. Go to the URL (Website Link) located on your Internet Browser and save this as a 'Favourite'. You will then only need to do **HOT TIP on Step 5** each time you wish to request this report.

- Your CSV file will arrive in your Email Inbox. You can download this in two ways, either by clicking on **'Download File'** or copying the URL link into your Internet Browser.
- Once you have downloaded this, it will appear in your downloads on your device, and you can click on the file, and it will open the CSV file into Microsoft Excel.



13. Go to the column that says **'Subscription Variations'** and filter by typing in your Club's exact name. This is to ensure this report is only members of your Club. This will have Primary memberships of your Club and members who have Club Add-Ons within your club. If you wish to remove Club Add-On members from this report, you can filter this by going to **'Membership Level'**.

If you are unsure how to filter your report, you can follow the below steps:

1. Select the column(s) you wish to filter.
2. Go to the heading **'Data'** and select **'Filter'**. Screenshot below:



14. You now have a Current/Active Members Report. We suggest saving this as a Microsoft Excel Spreadsheet (not as a CSV file) when you select the file type.

AusCycling Member Services Team suggests you save this as:
Current Members Report – as of YYYY-MM-DD

Example:

Current Members Report – as of 2022-06-24

Please ensure this is saved safely within your Club's records, as this is personal information of members of AusCycling and your Club.



Questions/Feedback on your Report

We hope this guide has helped your Club with assisting with providing a report of active members within your club.

If you have questions or feedback on this guide/report,
please contact the AusCycling Member Services Team - membership@auscycling.org.au

