

Member Manager Training

Help Center > Maturity > [Membership](#)



How to run Monthly Reports

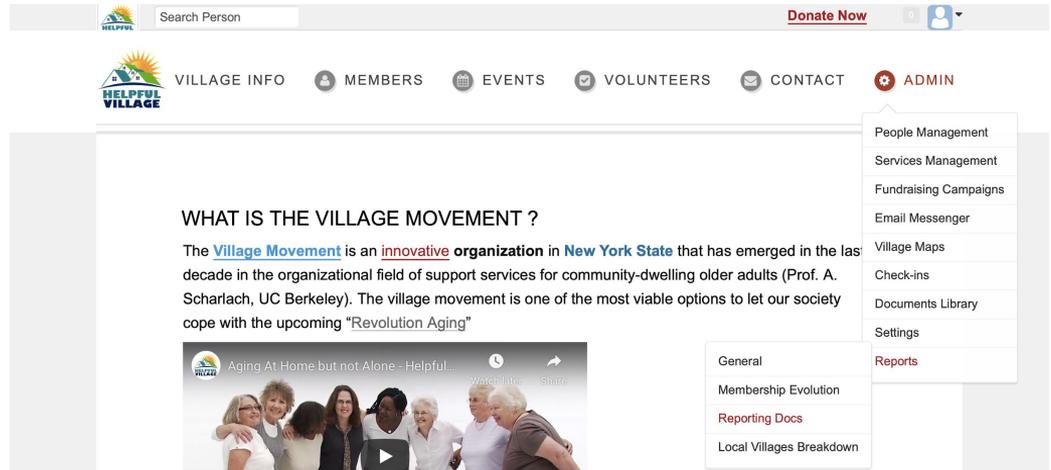
Member Manager Monthly Tasks

Member Manager Monthly Tasks

- ▷ Monthly reports should be on the same day each month (ex. 1st of month)
- ▷ These reports will show important numbers and provide an overview of membership
- ▷ In our examples we will be running reports as if it is December 1st

How to access Member Reports

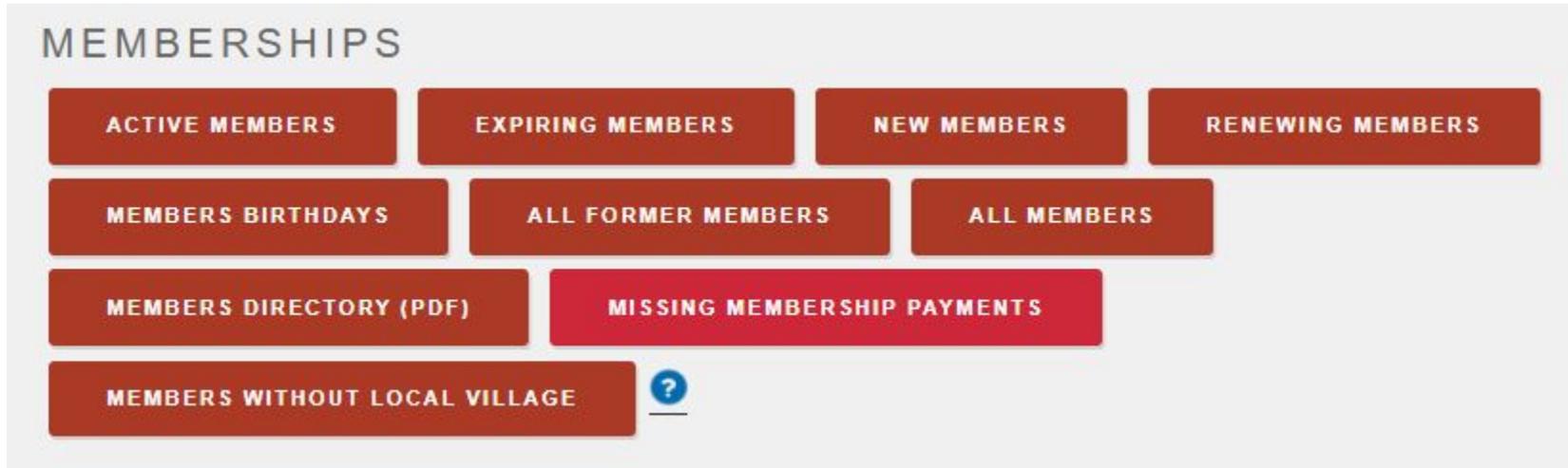
- ▶ Select Admin
- ▶ Select Reports
- ▶ Select Reporting Docs



The screenshot shows the website interface for Helpful Village. At the top, there is a search bar with the text "Search Person" and a "Donate Now" button. Below this is a navigation bar with the following items: "VILLAGE INFO", "MEMBERS", "EVENTS", "VOLUNTEERS", "CONTACT", and "ADMIN". The "ADMIN" item is highlighted, and a dropdown menu is open, listing the following options: "People Management", "Services Management", "Fundraising Campaigns", "Email Messenger", "Village Maps", "Check-ins", "Documents Library", "Settings", and "Reports". The "Reports" option is highlighted in red. Below the navigation bar, the main content area features a video player with the title "Aging At Home but not Alone - Helpful..." and a play button. The video player is surrounded by a group of diverse older adults.

How to access Member Reports (cont)

- ▶ You will now arrive at a list of reports



How to run a Report

- ▷ Select desired report
- ▷ In the box, select the correct village (if your Village is a Hub and Spoke model)
- ▷ In the box, set the date as the day before the current date or set date range for desired time
- ▷ Select Create Report

ACTIVE MEMBERS ✕

SELECT VILLAGE

All local villages

DATE

2020-12-31

with admin notes

CREATE REPORT

EXPIRING MEMBERS ✕

SELECT VILLAGE

All local villages

DATE RANGE

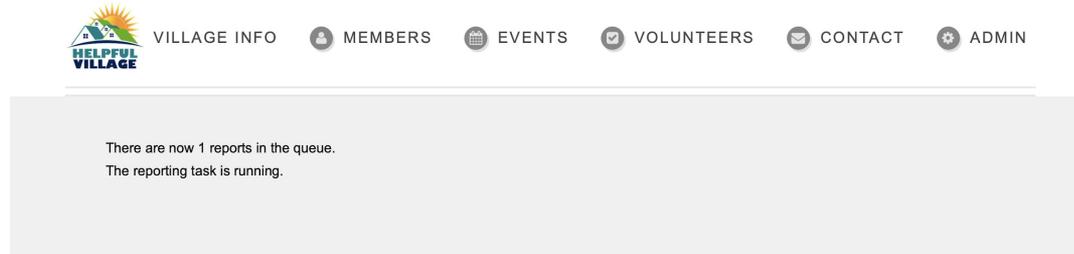
2021-01-01

2021-01-31

CREATE REPORT

How to run a Report (cont)

- ▶ Upon selecting Create Report the screen will read “The report task is running”



- ▶ Upon finishing the task, the report will be sent to your email as an excel spreadsheet

How to use Reports to your Advantage

Expired Members Report

- ▷ Set Expiring Members report for the past month
- ▷ This will provide a list of whose memberships have expired in the last month and their contact information
- ▷ This list can be used to contact all these members to discover why their membership expired
- ▷ Very useful in maintaining membership

Expiring Members Report

- ▷ Set for the next month
- ▷ This will provide a list of whose memberships will expire in the coming month
- ▷ This list can be used to contact all these members to renew their membership before they expire
- ▷ Allows preemptive action to prevent expiration in order to better member retention

Missing Payments Report

- ▷ Only members missing payments appear on this report
- ▷ One time payments: if paid until dates and expiration dates don't match then there is a missing payment
- ▷ One time payments: if they match they are current with payments
- ▷ This report allows you to follow up with members who need to make payments

Missing Payments Report

- ▷ Only members missing payments will appear on this report
- ▷ Monthly Payments: See how many missing monthly payments a member has from “Missing payments?”
- ▷ Monthly Payments: From joined date, each monthly payment will be added from joined date to paid until date
- ▷ When we receive a monthly payment notif from Stripe, we add one month to Paid until date.
- ▷ For example, if joined on Jan 1st, but made first monthly payment June 1st then “paid until date” is February 1st, so there are 5 missing monthly payments (1 payment made)

New Member Report

- ▷ Set New Member Report for previous month
- ▷ This list can be used to see if they are interacting with the Village, ask them about their onboarding experience and suggest them events and services.
- ▷ Used to create relationships that will last within the village

Some Reminders

- ▷ These reports should be run monthly, on the same day
- ▷ It does not have to be the first or last of the month (you choose which day you would like to use)
- ▷ Use these reports to your advantage to help your members!

Thank You!

Additional Support can be found at
support.helpfulvillage.com

