Managing Memberships

Club Administrators may field requests for the following:

- Transferring memberships (in and out of your club),
- Applying for new memberships,
- Renewing existing memberships.

1.   Transferring Memberships

If a member wishes to transfer **into** your club, they need to login to the Member Portal then head to the Member Lounge. From there they select Membership Desk then Request a Transfer. They will select your club from the dropdown menu and you will be able to approve their transfer in, but only after the original club has approved from their side. The member will need to know their membership number in order to login to their Portal.

If a member wishes to transfer **out of** your club, they can either login to the Member Portal and request a transfer as per the instructions detailed above, or you (the original club) can create in the CRM. Go to Transfers > New > populate the fields as required.

Transfer Note --	
Transfer Status **New Transfer**	Ensure the **Transfer Status** says New Transfer when you create it.

Ensure that you change the **Transfer From Approval** field to Approved, but only after you've created and saved it.

‹ Transfer Details

		Destination Club * 🔒 **Paekakariki Surf Lifeguards**
Original Club * 🔒 **Titahi Bay SLSC**		Transfer To Approved 🔒 --
Transfer From Approv **Pending**		
Original Club Approv 30/12/2022 11:10 a.m.		

2.   Applying for New Memberships

If a person has not been a member before they can submit an online membership application (one per person) at the following link:

https://webportal.surflifesaving.org.nz/new-membership/

Clubs then need to make the application **Post-Processed.** This will generate a membership record with the unique membership number attached to it.

3.   Renewing Existing Memberships

If an existing member of yours want to return this season and become an active member you need to find their inactive membership record and roll it over into the current season.

In the CRM: head to Memberships > Inactive Memberships > tick the record(s) you wish to make active > select Rollover to Current Season.

In the Portal: head to My Club > Memberships > Inactive Memberships > find the record you wish to make active and select Edit from the dropdown menu at the end of their name > Rollover to Current Season.