

Clubs are useful in organizing your **People** records and categorizing them in easily searchable groups. You can create clubs and club statuses with renewal dates and customize them according to your needs.

Creating and Editing Clubs

- To create/edit a **Club**, click on the **People Dashboard**, then the **Settings**  button on the top right **Dashboard Navigation Bar** and open the **Club** tab. A list of existing clubs will appear along with the total number.
- Search for club codes using the **Search Bar** along the top.
- Scroll through the pages of your list of clubs using the left and right arrows or by selecting the desired page at the bottom. You can also control the number of clubs or items listed per page using the drop-down menu (5, 10, or 20 items per page).
- To view/edit a club, click the  button to the left of the club code, make your edits and press .
- To delete a club, click the  button and choose **Yes** when asked “Are you sure to delete?” to delete the club permanently or **No** to cancel.
- To create new club, click  and a new **Club Code** window will appear.



- Enter a **Club Code** of up to 30 characters that will help you remember its significance (Ex: Inner Circle, Grassroots, Round Table, etc.) and then click .
- Click **Cancel** at any time to exit the new club window and not save the information.

Creating Club Statuses

To create/edit a **Club Status**, click on the **People** menu, then the **Settings**  button on the top right **Dashboard Navigation Bar** and open the **Club Status** tab. A list of existing club statuses will appear along with the total number.

- Search for club statuses using the **Search Bar** along the top.
- Scroll through the pages of your list of club statuses using the left and right arrows or by selecting the desired page at the bottom. You can also control the number of club statuses or items listed per page using the drop-down menu (5, 10, or 20 items per page).
- To view/edit a club status, click the  button to the left of the club code, make your edits and press .

- To delete a club status, click the  button and choose Yes when asked “Are you sure to delete?” to delete the club status permanently or No to cancel.
- To create new club status, click  and a new Club Status window will appear.



- In this new **Club Status** window, you'll want to choose the **Club** that you are creating the new status for using the drop-down menu, create the status name which can be up to 50 characters long (Ex: “Inactive”, “Active”, “Lapsed”, “Expired”, “Hot Prospect”, “Club Level 1”, etc.), and then click .

Using Clubs in a People Record

Within a **People** record, the total number of clubs the people record belongs to and clubs that have upcoming renewal dates appear under the **Clubs Panel** in the profile. If you click on the panel, an overview of the clubs will appear. You can click the **All** in the top right corner of the panel summary to see a list of all active clubs that the profile is a part of.



Club	
	Active Clubs <input type="checkbox"/> Include Closed Clubs All
1 Membership	1 Membership
Upcoming Renewal Date 10/1/24	0 Membership
Inner Circle (Club Level 1) By Solicitor	By Candidate George Washington (1)

- To add a new club to a people record, click . A new **Club** window will open where you can choose the **Club** and **Club Status** in the drop-down menu. You can also add a **Solicitor**, **Candidate**, **Renewal Date**, and/or enable the **Primary** **Club**, **Override**, or **Closed** toggles then click .

Club
Mr. Joseph Banks (PID: 74157837) Add a new Club

Club Primary Club

Status Override

Closed

Solicitor

Candidate

Renewal Date

- You may click  anytime to exit the window.
- You may click  to open an existing club and edit the info or  to delete a club from a profile.

Searching with Clubs and Club Statuses

When searching for People records, you may search for all records within a specific Club, Club Status, and/or with a Club Renewal Date under the Group section.

Club

Club Status

Having All Clubs

Club Renewal Date

**For more detailed information on searching, please see the [Crimson - People Search](#) guide on the HelpDesk.