

## **How can I see the memberships that expire within a certain date range without creating a Contact list or report?**

Version 4.0

PastPerfect has an easy way to get a list of all memberships that expire within a selected date range. By using the steps below, you can get an updated list of memberships that expire, send out renewal letters and print out mailing labels, or renew their membership. This updated list can be found under the “Overdue/Renewal Lists & Letters” section of a contact’s membership record.

From any member’s contact record, click the “Membership” button to display the membership section of their record. At the bottom center of the screen, click the button for “Overdue/Renewal Lists & Letters.”

Once you are on the “Membership Renewal List” screen, enter the Paid Thru date range you wish to use. For example, you can type in 01/01/2010 through 06/30/2010 to find members who expire between January 1, 2010 and June 30, 2010. This date range can be past and/or future dates.

When a date range is entered, the listing of memberships will display only memberships that expire (or did expire) during the selected date range. A sum of all dues amounts owed for these members is listed at the bottom right of the screen.

Once you have the list of your memberships, you can print out address labels from the “Print or View Labels” button at the bottom of the screen, or Mail Merge letters from the “Print or View Letters” button. A list of these members (with the dues amount total) may also be printed from the “Print List” button.

To access the billing member’s contact record for one of these memberships, simply double click on the membership name. To enter a renewal payment for one of these memberships, click once to select the membership, and then click the “Renewal” button at the bottom of the screen. Enter in the appropriate payment information, and then post the dues payment.

Once a membership has been renewed, the paid thru date will be updated for the membership. The membership may also be removed from this list if the paid thru date no longer falls within the selected date range.

If you have any questions, please contact our Support Office at 1-800-562-6080 or email [support@museumsoftware.com](mailto:support@museumsoftware.com). Thank you for using PastPerfect!