How to Invite Families and Manage Your Member Directory

Overview

Once your co-op site is set up, you are ready to bring families on board. This guide covers:

- Sending a membership invitation to a family
- What the invited family sees when they follow the link
- Tracking invitation status
- Viewing and searching the member directory
- Opening a member record and updating a member's role

Step 1: Send an invitation

1. Sign in to your admin panel.
2. In the left sidebar, click **Invite Members**.

Invite Members form — desktop view

The **Invite Members** page opens with the **Single Invite** tab selected.

3. Under **Invite as**, choose the role you are assigning:

Option	Who it is for
Member	A family joining to participate in co-op activities
Co-Admin	A trusted parent you want to help manage the co-op

4. Enter the family's **Email Address** (required).

5. Optionally, add the family's **Name** and select their **Family Association** from the dropdown if you have families already set up.
6. Optionally, type a short note in the **Personal Message** field — this appears in the invitation email.
7. Click **Send Invitation**.

CooplyHQ sends the family an email with a link to complete their membership application.

> **Tip:** To invite several families at once, click the **Bulk Invite** tab and follow the on-screen instructions.

Step 2: What the family sees

When a family receives the invitation email and clicks the link, they arrive at your co-op's membership application.

Family membership application — desktop view

The application walks the family through three steps:

1. **Contact Info** — primary guardian's name, email address, and phone number
2. **Household** — adding children and other household members
3. **Membership** — selecting a membership plan and completing payment (if applicable)

Once submitted, the family appears in your **Membership Signups** queue for approval.

Step 3: Track invitations

To see the status of every invitation you have sent:

1. In the left sidebar, click **Invitations**.

Invitation Tracking page — desktop view

The **Invitation Tracking** page shows summary counts at the top:

Counter	Meaning
Total Sent	All invitations ever sent

Counter	Meaning
Pending	Sent but not yet accepted
Accepted	Family completed their application
Expired	Invitation link is no longer valid

Use the **Search by email** box to find a specific invitation, or use the **All / Pending / Accepted / Expired** filter tabs to narrow the list.

From the **Actions** column you can resend or cancel individual invitations.

Step 4: View the member directory

The member directory shows every person who has joined your co-op.

1. Go to your admin **Dashboard**.
2. In the dashboard widgets, click **Active Families** to open the member directory.

Member directory — desktop view

The **Members** page shows a table with each member's name, email, role, and the date they last logged in.

Filter by role

Use the filter buttons at the top of the list to show only members with a specific role:

Filter	Who it shows
All	Every member, regardless of role
Admins	Co-op administrators
Staff	Staff members who help manage events and registrations
Guardians	Parents and guardians who have completed membership
Members	Members with basic access

Search by name or email

Type in the **Search by name or email** box to filter the list as you type. This is useful when your co-op has many members and you are looking for a specific person.

Step 5: Open a member record

1. In the member directory, find the person you want to view.
2. Click **Manage** on their row.

Member detail page — desktop view

The member detail page shows two sections:

Member Information

Field	What it shows
Email	The member's login email address
Email Verified	Whether the email has been verified, and when
Last Login	The date and time of their most recent sign-in
Member Since	The date their account was created

Manage Role

The current role is highlighted. See Step 6 to change it.

Step 6: Change a member's role

1. On the member detail page, find the **Manage Role** section.
2. Select the role you want to assign:

Role	Access level
Admin	Full access to all co-op features and settings
Staff	Can manage events, registrations, and view member information
Guardian	Can view events, register for events, and manage their family
Member	Basic access to view events and registrations

3. Click **Update Role**.

A confirmation message appears when the role is saved.

Next steps

- To approve a family's membership application after they sign up, see **How to Review and Approve Membership Signups**.
- To create an event for your members to register for, see How to Create an Event and Enable Member Registration.

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