

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**.

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Invite Members

Send membership invitations to new members

Single Invite

Bulk Invite

Invite as

Member

Co-Admin

Email Address

member@example.com

Name (optional)

John Doe

Family Association (optional)

No family

Personal Message (optional)

Add a personal note to the invitation email...

Send Invitation

View All Invitations

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

- 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

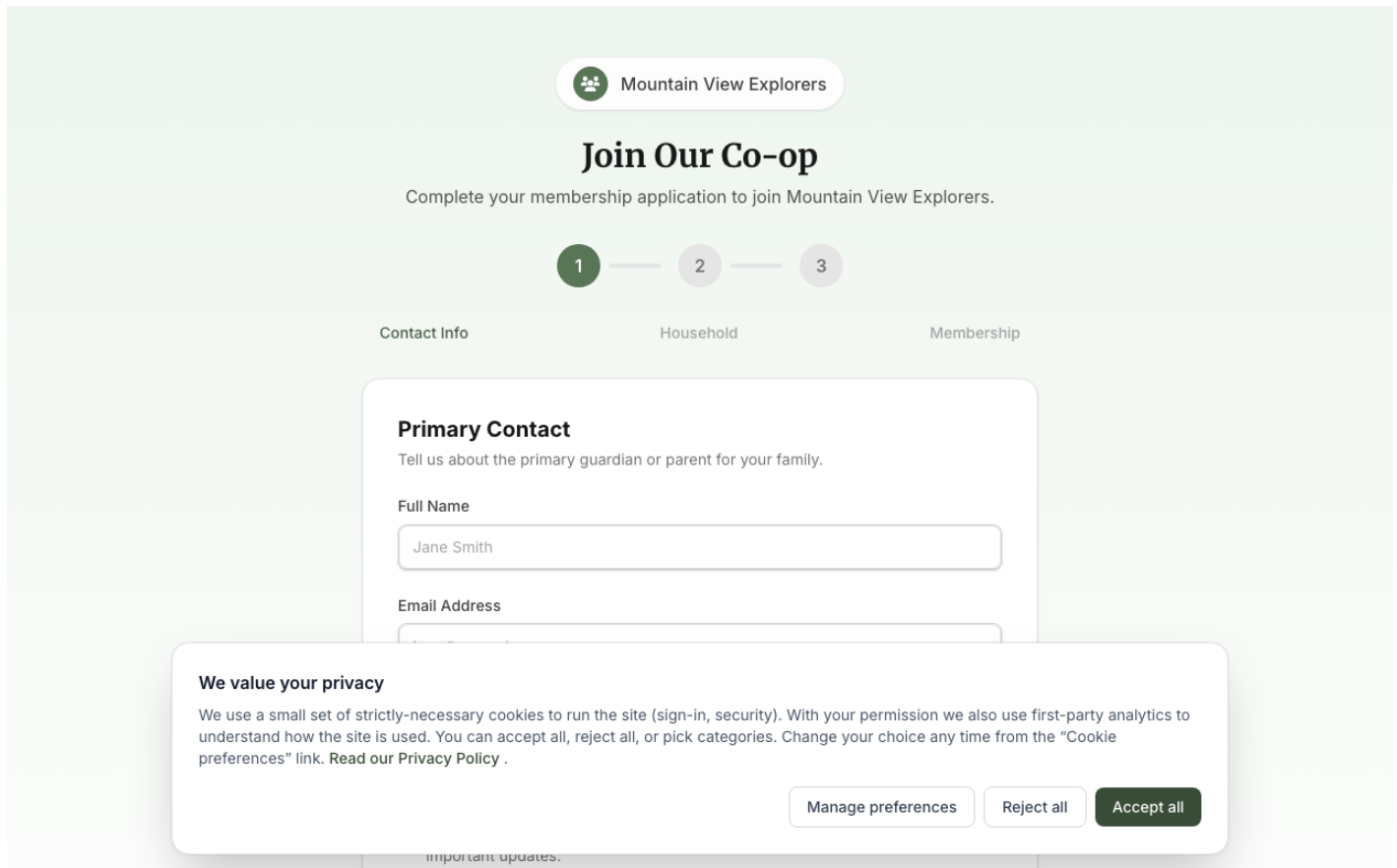
- Enter the family's **Email Address** (required).
- Optionally, add the family's **Name** and select their **Family Association** from the dropdown if you have families already set up.
- Optionally, type a short note in the **Personal Message** field — this appears in the invitation email.
- Click **Send 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.



The screenshot shows a web form titled "Join Our Co-op" for "Mountain View Explorers". The form is part of a three-step process: 1. Contact Info, 2. Household, and 3. Membership. Step 1 is currently active. The form asks for the primary guardian's information. A privacy notice is displayed at the bottom of the form, stating that the site uses cookies for sign-in, security, and analytics, and provides links to manage preferences, reject all, or accept all cookies.

Mountain View Explorers

Join Our Co-op

Complete your membership application to join Mountain View Explorers.

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Contact Info Household Membership

Primary Contact
Tell us about the primary guardian or parent for your family.

Full Name
Jane Smith

Email Address

We value your privacy
We use a small set of strictly-necessary cookies to run the site (sign-in, security). With your permission we also use first-party analytics to understand how the site is used. You can accept all, reject all, or pick categories. Change your choice any time from the "Cookie preferences" link. [Read our Privacy Policy](#).

[Manage preferences](#) [Reject all](#) [Accept all](#)

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**.

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Invitation Tracking

Send Invitations

Track all member invitations sent by your co-op

TOTAL SENT
0

PENDING
0

ACCEPTED
0

EXPIRED
0

Search by email...

All

Pending

Accepted

Expired

EMAIL	STATUS	INVITED BY	SENT	ACCEPTED	ACTIONS
No invitations found.					

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

Counter	Meaning
Total Sent	All invitations ever sent
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.

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

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Members

Manage co-op members and their roles

Invite Admin

All 6

Admins 1

Staff 0

Guardians 5

Members 0

Search by name or email...

MEMBER	ROLE	LAST LOGIN	
AA Avery Abernathy family1@mountainview.demo	Guardian	4 weeks ago	Manage
BB Brooke Burgess family2@mountainview.demo	Guardian	4 weeks ago	Manage
CC Cameron Caldwell family3@mountainview.demo	Guardian	4 weeks ago	Manage
MK Marcus Kettering parent2@mountainview.demo	Guardian	4 weeks ago	Manage
RS Rachel Stone mountainview-parent@franzone.com	Guardian	4 weeks ago	Manage
DB Daniel Brookbank mountainview-admin@franzone.com	Admin	4 weeks ago	Manage

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:

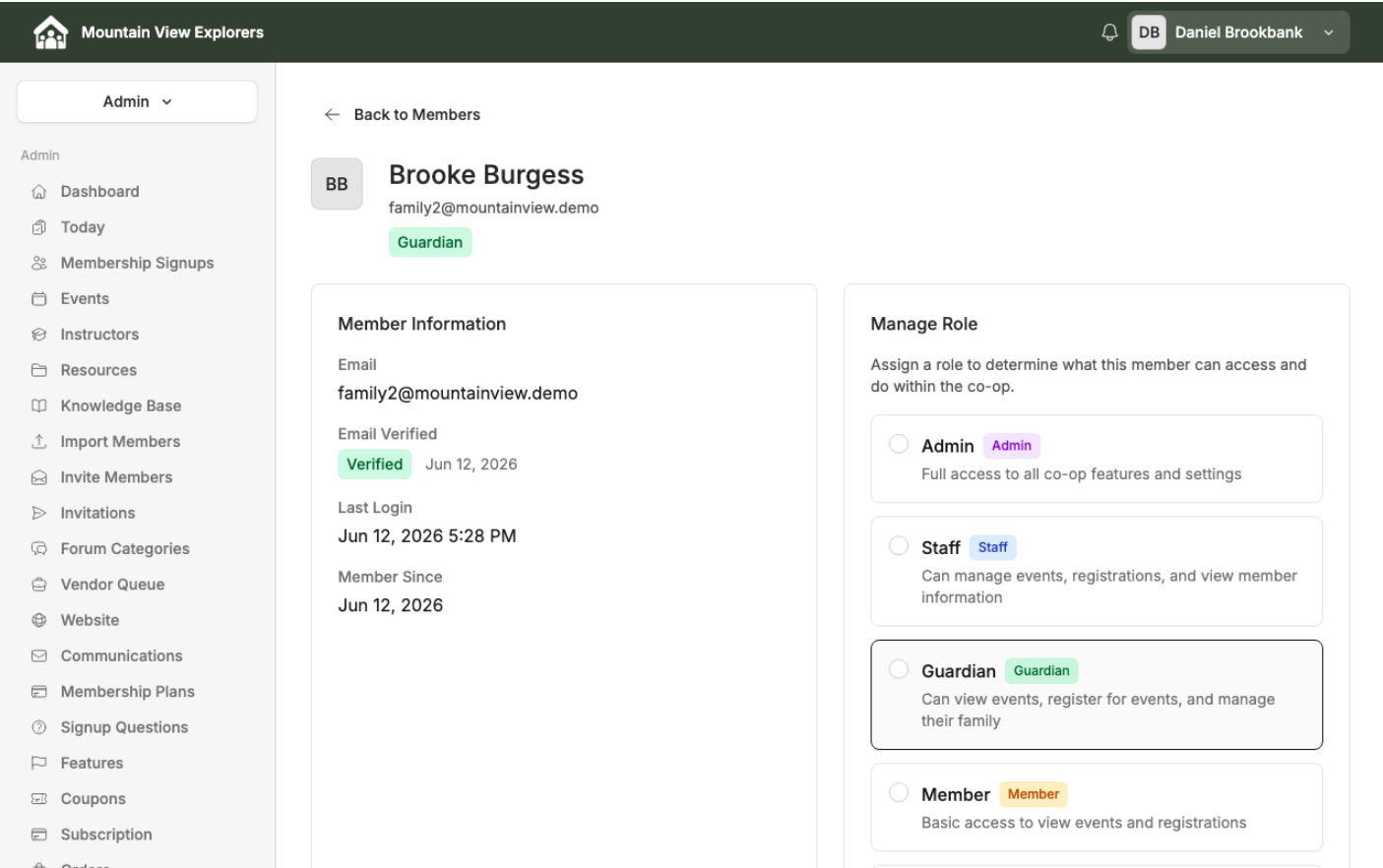
Filter	Who it shows
All	Every member, regardless of role
Admins	Co-op administrators
Staff	Staff members who help manage events and registrations
Guardians	Parents and guardians who have completed membership
Members	Members with basic access

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.



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](#).