

# Membership Maintenance

Resignations...How to Manage Member Status, Types, & Member Data



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# Ask a Question at Any Time!

Questions will be addressed at the end of the webinar.

Visit our Education Resource Center at [kb.clubessential.com](https://kb.clubessential.com)

**Please note:** This webinar is being recorded and will be available within 48 hours.

1. **How To Resign a Member**
  - a. Status Only Change
  - b. Change Member Type and Status
    - Scheduled Changes
  
2. **Reusing Member Numbers**
  - a. Office Steps
  - b. Website Steps
  
3. **Surviving Spouse takes over as Primary**
  - a. Office Steps
  - b. Website Steps



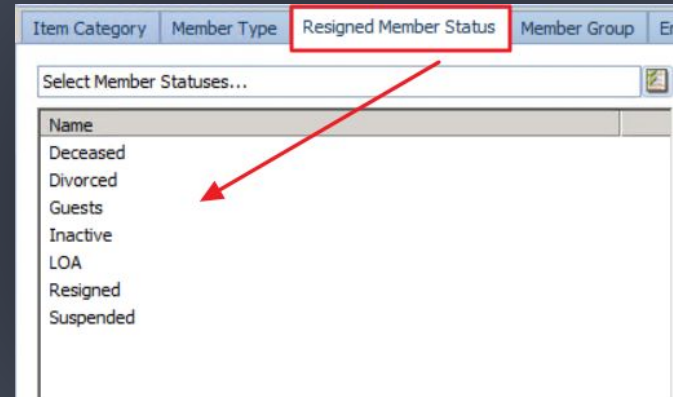
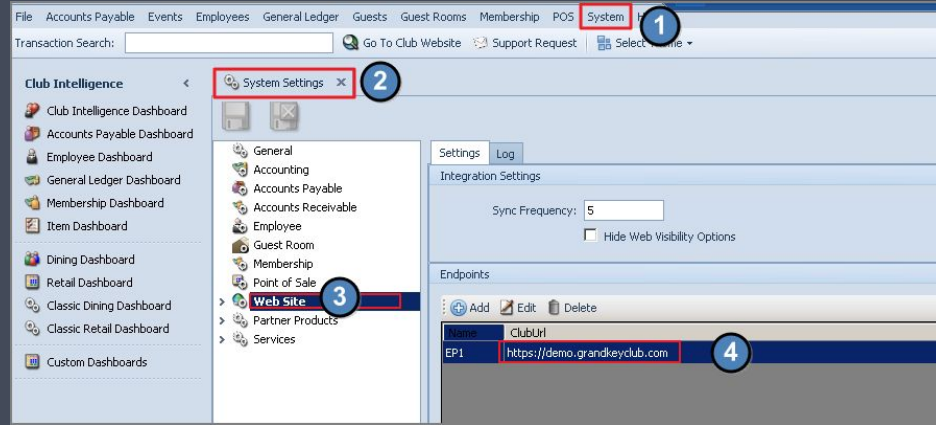
# Resignation Settings

The **Member Status** in Office will control if the member's web account is **active or inactive** by setting an **expiration date** on the web profile. These Status settings are determined in the **Office Unification Settings**.

To review which of your **Status** are set as **Inactive**, please refer to the **Unification settings in office**.

1. Go to **System** across the top.
2. Select **System Settings**.
3. Click **Web Site**
4. Double click the **ClubURL** in blue to open the unification settings.

Here you may view which **Member Statuses** have been defined as **Inactive**.



## Required Status Change

In order for a club to resign a member, the only **REQUIRED** step is to change the Member Status.

If the entire family is resigning, the Status on **ALL** accounts must be changed.

Changing the Status on the **Primary Member** account does not automatically change the Status on the related spouse/dependent accounts.

1. Open the record of the **Primary Member**.
2. Click the **looking glass** icon in the **Status** field.
3. Look up box will display with Status options. Double click the **Resigned Status** to select.

It is important to note that your club may configure different Status types, such as **Inactive vs. Resigned**.

Manage Members x

Home

New Edit Delete Export Refresh Clear Filter Refresh Aging Active Help

Search: 1799

Member Number	First Name	Last Name	Member Type	Member Status
1799	Ruben	Montano	Regular	Active
1799A	Jen	Montano	Regular-Sp	Active
1799B	Jake	Montano	Regular-Dep	Active

Home [1799] Ruben Montano x 1

Membership Groups Pictures Preferences Scheduled Changes Web Settings Communication Physical Address Email Address Phone Messages Financial Information AR Activity Bank Accounts Billing Installment Billing Credit Book Credit Cards Gift Cards Vouchers Late Fees MAP Minimums Sponsored Folios Statements Other Attachments

Edit Member

Member ID: 1799 Ruben Montano

Member Type: Regular

Status: Active

Player Type: (None)

Title: (None) Suffix: (None)

Swipe ID: 1799

First: Ruben Middle: Last: Montano

Email: rmotano@carolina.rr.com Phone: (704) 771-5962

Quick Label

Lookup Value

Date	Name	Total	Mer
I 9/30/2020	Suspended	\$50.00	
I 9/30/2020	Resigned	\$510.00	
I 9/30/2020	MO	\$60.00	
I 9/30/2020	LOA	\$510.00	
P 8/17/2020	Inactive	(\$500.00)	
P 8/17/2020	Guests	(\$60.00)	
I 7/31/2020	Guest Room	\$60.00	
I 7/31/2020	Estate	\$500.00	
P 7/15/2020	Cash Only	(\$500.00)	
P 7/15/2020	Active	(\$60.00)	

# ← Status Change = Expiration Date

1. Update the **Status** to **Resigned**.
2. **Save and Close** the member record.

Changes to a Member's Status will **automatically** trigger a **Roster Sync**.



**Member Expiration Date** on the web profile is set, making the member **Inactive**.

Repeat the same steps for the **Spouse and Dependents**.

Home [1799] Ruben Montano

Membership  
Groups  
Pictures  
Preferences  
Scheduled Changes  
Web Settings  
Communication  
Physical Address  
Email Address  
Phone  
Messages

Edit Member

Member ID: 1799

Member Type: Regular

1 Status: Resigned

Title: (None) Suffix:

First: Ruben

Email: rmontano@carolina.rr.com

Ruben Montano

Player Type: (None)

Swipe ID: 1799

Middle: Last: Montano

Phone: (704) 771-5962

Quick Label

Manage Members

Home

New Edit Delete Export Refresh Clear Filter Refresh Aging Active Help

Search: 1799





Member Number	First Name	Last Name	Member Type	Member Status
1799A	Jen	Montano	Regular-Sp	Active
1799B	Jake	Montano	Regular-Dep	Active
1799	Ruben	Montano	Regular	Resigned

# Member Expired on Web




LAST NAME FIRST NAME MEMBER NUMBER EMAIL ADDRESS

montano [ ] [ ] [ ] [ ] SEARCH SHOW ALL Members

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

NAME	ADDRESS	PHONE
 Montano, Jen email: jmontano3@gmail.com	2805 Tuscarora Lane Waxhaw, NC 28173	
 Montano, Ruben email: rmontano@carolina.rr.com	2805 Tuscarora Lane Waxhaw, NC 28173	

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

-  User's account is not activated
-  User is an Administrator
-  User is an Editor
- Red Name** indicates user is marked as hidden

Fill in the boxes below using the Member's information

Relationship

Title

First Name \*

Middle Name

Last Name \*

Suffix

Display this user in the Directory  
(only affects member viewing, not admin.)

- Members of this family are now **Inactive**
- View **Inactive Members**, by changing the **search filter** to either **Members** or **Inactive Members** in the top right corner
- The **Membership Expires** date is automatically set based on the date the office Status is changed
- Based on Rules associated with the **Office Status**, the Member will no longer be displayed in the Active Member Directory

Members Staff My Profile Search

Ruben Montano

Membership Number	1799
Relationship	0 - Self / Primary
Membership Type	
Member Since (Join Date)	January 13, 2020
Membership Expires (Office Status)	October 1, 2020

# Resigned Member Still Connected

Member Number	First Name	Last Name	Member Type	Member Status
1799	Ruben	Montano	Regular	Active
1799B	Jake	Montano	Regular-Dep	Active
<b>1799A</b>	<b>Jen</b>	<b>Montano</b>	<b>Regular-Sp</b>	<b>Resigned</b>

**Scenario:** Primary Member is still Active, but the Spouse is not; due to a divorce.

NOTE: Resigning the Spouse via the **Status** does not result in a **disconnect** from the primary member.

**Fully** disconnecting the Resigned member is **NOT** a recommended or required step. It impacts Billing History as well as any open tickets that may not have been processed.

**The only recommended step is to clear out the name in the Spouse Member Field. The resigned member will continue to show in the Dependents box.**

Home: [1799] Ruben Montano x

**Membership**

- Groups
- Pictures
- Preferences
- Scheduled Changes
- Web Settings
- Communication
  - Physical Address
  - Email Address
  - Phone
  - Messages
- Financial Information
  - AR Activity
  - Bank Accounts
  - Billing
  - Installment Billing
  - Credit Book
  - Credit Cards
  - Gift Cards
  - Vouchers
  - Late Fees
  - MAP
  - Minimums
  - Sponsored Folios
  - Statements
- Other
  - Attachments
  - Custom Fields
  - Notes

**Edit Member** Ruben Montano

Member ID: 1799  
Member Type: Regular  
Status: Active  
Title: (None) Suffix: Suffix  
First: Ruben  
Email: rmontano@carolina.rr.com  
Player Type: (None)  
Swipe ID: 1799  
Middle: Last: Montano  
Phone: (704) 771-5962

**Names**

Alt Name: Family Title: Proper Title: Statement Name: Regular Title:

**Dates**

Approval Date: BirthDate: 10/9/1972 Age: 47  
Join Date: 1/13/2020 \$0.00  
Wedding:

**Miscellaneous**

Gender: Male  
Profession: Member URL 1: PIN:

**Spouse**

Spouse First Name: Spouse Member: [1799A] Montano, Jen

**Dependents**

ID	First Name	Member ...	Age	Birth Day M...
1799A	Jen	Regular-Sp	45	May
1799B	Jake	Regular-Dep	17	September



Only the **Primary Member** will display in search results for **Active Members**.

However, in **ADMIN** view, the **Other Members** area still displays the **Resigned Spouse**. This area will display both active and inactive members as long as they are still connected in Office

**Member View** does NOT.

Members Staff My Profile Search Export Settings User Statistics

LAST NAME FIRST NAME MEMBER NUMBER EMAIL ADDRESS

montano [ ] [ ] [ ] [ ] SEARCH SHOW ALL Active Members

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

NAME	ADDRESS	PHONE
Montano, Ruben email: rmotano@carolina.rr.com	2805 Tuscarora Lane Waxhaw, NC 28173	

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

## Admin View

First Name	Ruben
Middle Name	
Last Name	Montano
Suffix	
<a href="#">EDIT THIS USER</a>	
Email #1	rmotano@carolina.rr.com
Email #2	
Other Members	Jen Montano - Spouse / Secondary Jake Montano - Child / Additional

## Member View

Membership Type	
Member Since (Join Date)	January 13, 2020
Display Name	
Title	
First Name	Ruben
Middle Name	
Last Name	Montano
Suffix	
Email #1	rmotano@carolina.rr.com
Other Members	Jake Montano - Child / Additional

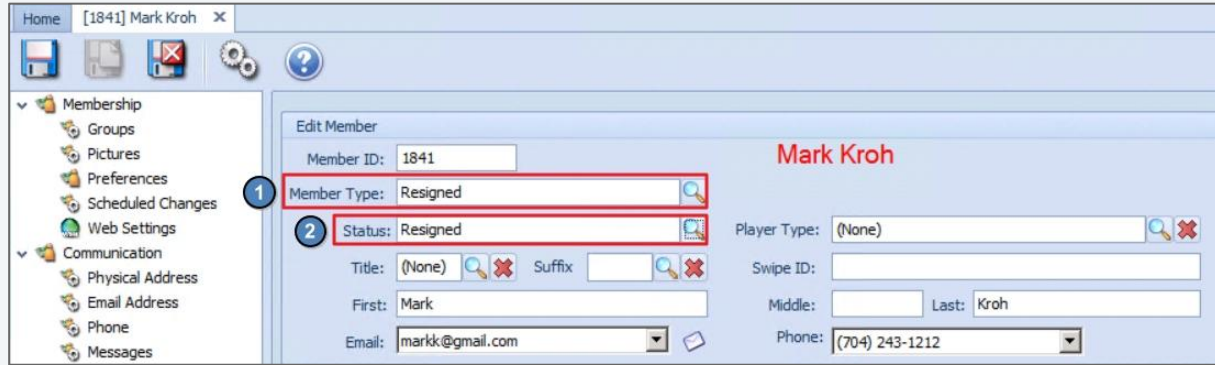
# Change Member Type and Status

## Member Type and Status Change

When Resigning a Member, some clubs change **BOTH** the **Member Type** as well as the **Status**.

This can be helpful for **Reporting** to track the number of Resignations at the Club.

Changing the Member Type to **Resigned** also provides some additional functionality within the sync process, that can be useful for clubs that **reuse member numbers**.



Home [1841] Mark Kroh x

Membership

- Groups
- Pictures
- Preferences
- Scheduled Changes
- Web Settings

Communication

- Physical Address
- Email Address
- Phone
- Messages

Edit Member

Member ID: 1841

Member Type: Resigned

Status: Resigned

Title: (None) Suffix:

First: Mark Middle: Last: Kroh

Email: markk@gmail.com

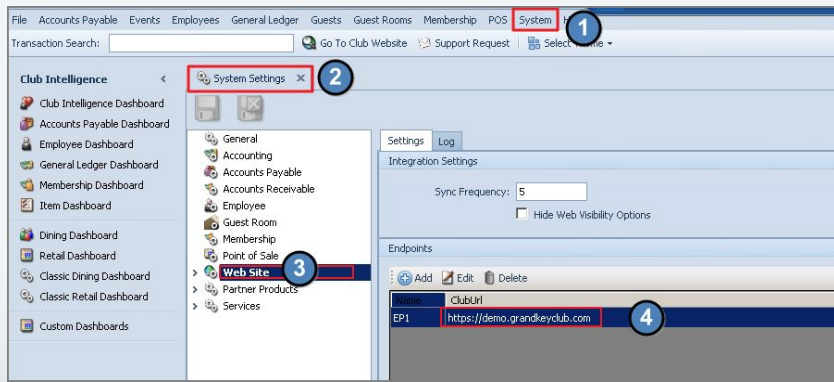
Player Type: (None)

Swipe ID:

Middle: Last: Kroh

Phone: (704) 243-1212

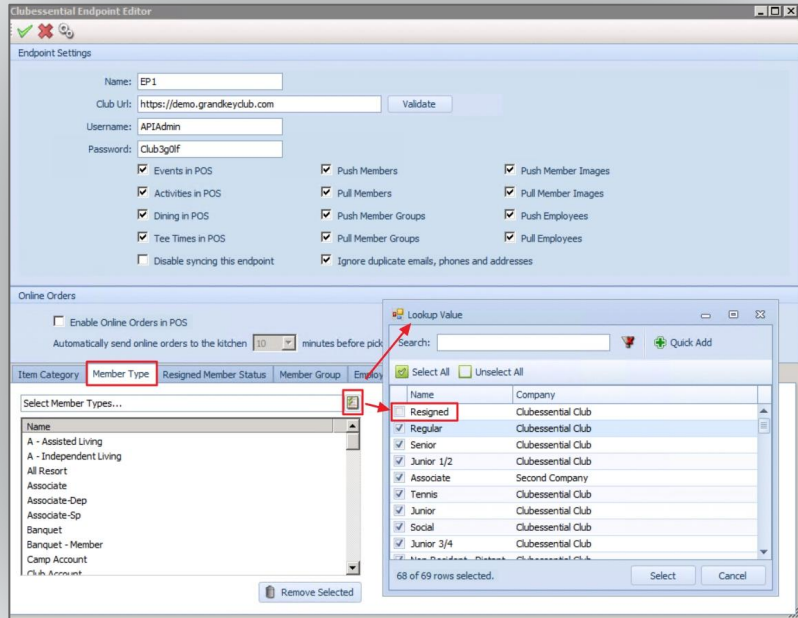
Member Number	First Name	Last Name	Member Type	Member Status
1841	Mark	Kroh	Resigned	Resigned
1841A	Karri	Kroh	Resigned	Resigned



## Unification Settings- Resigned Member Type

To access the **Unification Settings**

1. System
2. System Settings
3. Web site
4. Double click website URL highlighted in blue



Do **NOT** include the Resigned (Deceased, etc) Member Type to sync, if you wish to purge them from the website.

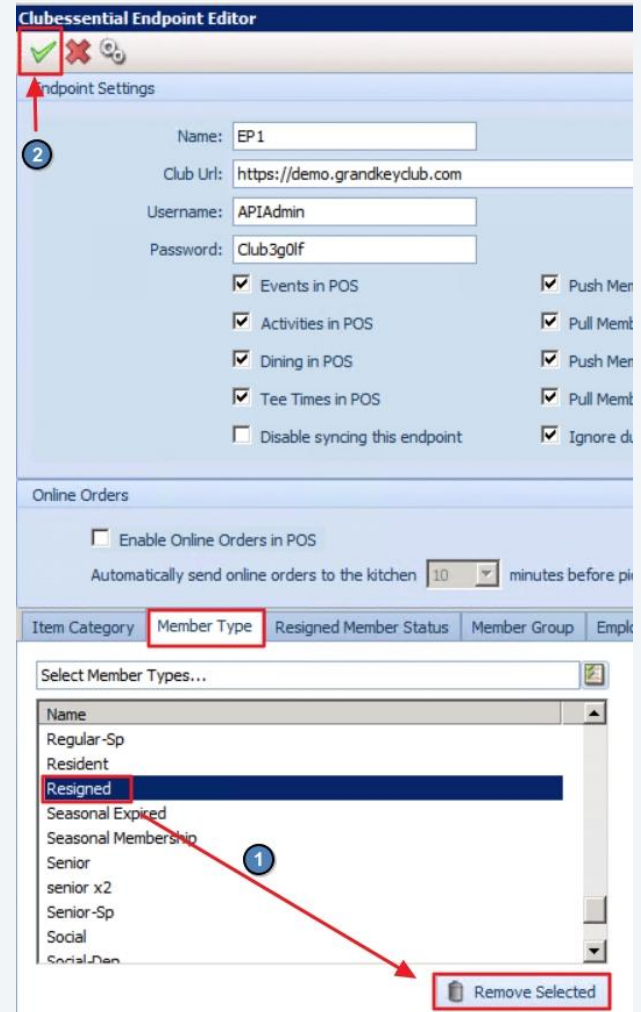
Otherwise, it's fine for that type to be included.

## Remove Resigned Type

If the **Resigned Type** appears in the selected box to sync, highlight it and click **Remove Selected**.

**Accept** the changes by clicking the **Green Check**.

**Save and Close** on the following System Settings tab.



Clubessential Endpoint Editor

Endpoint Settings

Name: EP 1

Club Url: https://demo.grandkeyclub.com

Username: APIAdmin

Password: Club3g0lf

Events in POS  Push Mer

Activities in POS  Pull Memt

Dining in POS  Push Mer

Tee Times in POS  Pull Memt

Disable syncing this endpoint  Ignore d

Online Orders

Enable Online Orders in POS

Automatically send online orders to the kitchen 10 minutes before pi

Item Category **Member Type** Resigned Member Status Member Group Empl

Select Member Types...

Name

Regular-Sp

Resident

**Resigned**

Seasonal Expired

Seasonal Membership

Senior

senior x2

Senior-Sp

Social

Social-Dep

⚠ Kroh, Karri  
email: kari@gmail.com

2800 Tuscarora Lane  
Waxhaw, NC 28173

⚠ Kroh, Mark  
email: markk@gmail.com

2800 Tuscarora Lane  
Waxhaw, NC 28173

## Mark Kroh

Membership Number	1841
Relationship	0 - Self / Primary
Membership Type	Regular
Member Since (Join Date)	September 1, 2018
Membership Expires (Office Status)	October 7, 2020
Profile Updated	October 1, 2020
Display Name	
Title	
First Name	Mark
Middle Name	
Last Name	Kroh



## Web Result / Changed Type and Status

Please Note...

As the Admin, when you open the web record, you will notice **ONLY** the **Member Expiration Date** changes in this scenario.

The Member Type **will not update** to **Resigned**, because we do not have that Member Type flagged to sync. It will stay the original type.


To purge **Resigned Members** from the web, access the **Delete Queue**.

From the **Admin Area**

- Navigate to **Integrations**
- Select **Roster Sync**

View **Delete Queue**

- Highlight **Resigned** members
- Click **Delete Selected**

 By deleting Members from the web, you will lose reservation history.




This will Delete the members from the Web


### Roster Sync Interface

UPDATE STATUS TYPES   VIEW LOGS   RESET QUEUES

Last Sync Performed 1/1/0001 at 12:00 AM

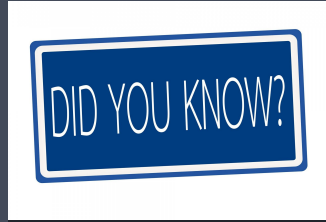
Enable Warnings    Show Addition Times

Additions Queue 

Delete Queue 

1841(0) - Mark Kroh	1
1841(1) - Karri Kroh	

KEEP SELECTED   **DELETE SELECTED**   << MATCH >>   CONFIRM SELECTED   DELETE SELECTED



## Scheduled Changes

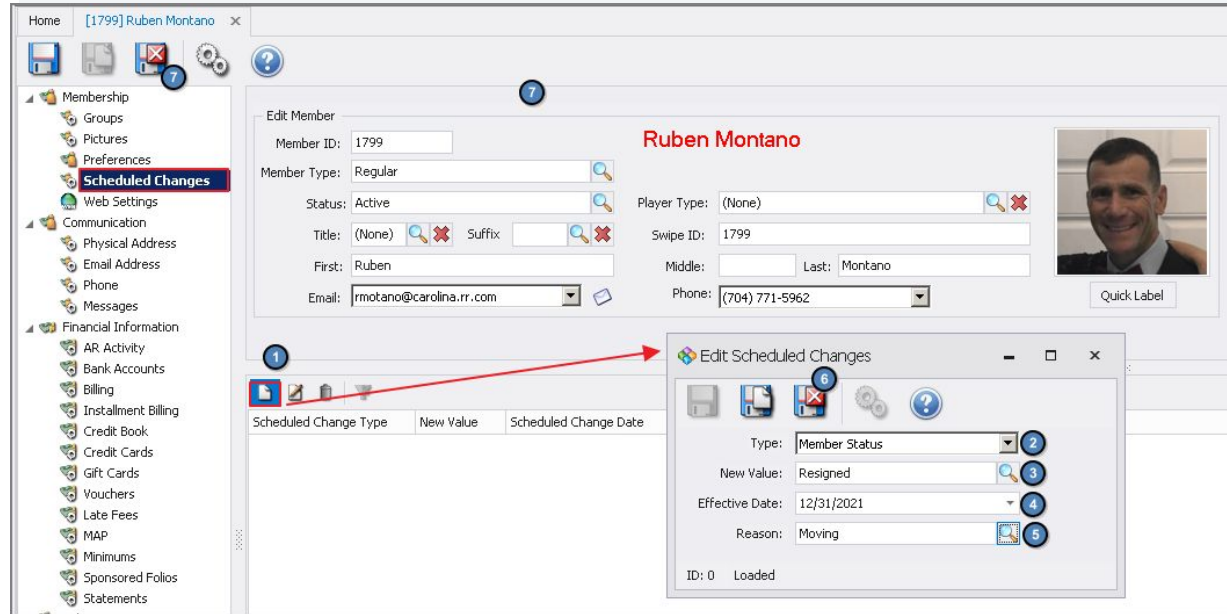
**This feature can be used to Schedule a change to a Member Type or a Member Status ahead of the actual change date!**



# Scheduled Changes

Under **Membership** navigate to the **Scheduled Changes** tab.

1. Click the **New Icon** and the pop up box will allow you to program what type of **Scheduled Change** you would like to set up.
2. Select the Change **Type**: Member Status or Member Type.
3. Click the looking glass to select the **New Value**.
4. Enter the **Effective date**.
5. **Enter a Reason**.
6. **Save and Close** the scheduled change.
7. **Save and Close** the member record.



The screenshot shows the 'Edit Member' form for Ruben Montano. The form includes fields for Member ID (1799), Member Type (Regular), Status (Active), Title (None), Suffix (None), First (Ruben), Middle (Montano), Last (Montano), Email (rmotano@carolina.rr.com), and Phone ((704) 771-5962). A 'Quick Label' button is visible next to a photo of Ruben Montano. The 'Edit Scheduled Changes' dialog box is open, showing the following fields: Type (Member Status), New Value (Resigned), Effective Date (12/31/2021), Reason (Moving), and ID: 0. A red arrow points from the 'New' icon in the dialog box to the 'Edit Scheduled Changes' dialog box.

Scheduled Change Type	New Value	Scheduled Change Date
Member Status	Resigned	12/31/2021

# Reusing Member Numbers

Rules to Remember!

## ➤ Reusing Member Numbers/Office Side

Office will not allow 2 members to be assigned the exact same member number.

To reuse a number, change the Member Number of the Resigned/Inactive member first.

Add the “identifier” at the **BEGINNING** of the member number.

**Suggestions are:**

**Resigned=R**

**Deceased=D**

**Terminated=T**

**Divorced=X**

Member Number	First Name	Last Name	Member Type	Member Status
1842	John	Visco	Senior	Active
X1842A	Melissa	Visco	Senior-Sp	Active

Here we used an **X** in front of the member number

Home [1842A] Melissa Visco

Membership

- Groups
- Pictures
- Preferences
- Scheduled Changes
- Web Settings

Communication

- Physical Address
- Email Address
- Phone
- Messages

Edit Member

Member ID: X1842A

Member Type: Resigned

Status: Divorced

Title: (None) Suffix

First: Melissa

Email: melissav@aol.com

Player Type: (None)

Swipe ID:

Middle: Last: Visco

Phone: (704) 771-5959

# Reusing Member Number-Web

Membership Number   \*

Select... ▾

Membership Type

Senior-Sp ▾

Display Name

Member Since (Join Date)

1/1/1900

Membership Expires (Office Status)

11/8/2020

Fill in the boxes below using the Member's information

Relationship

0 - Self / Primary ▾

Title

First Name \*

Melissa

Middle Name

Last Name \*

Visco

Suffix

Display this user in the Directory  
(only affects member viewing, not admin.)

Web Account Information

Username \*

  \*

Password \*

••••••••

Confirm Password \*

••••••••

- **Usernames do NOT** automatically update when a member number is changed. This field is **NOT** cleared out for Inactive members
- Usernames must be unique; otherwise the user will be locked out
- If the club does not purge Resigned Members from the Delete Queue to remove them from the web, the club **must update the Username** of the **Resigned/Inactive Member**

Web Account Information

Username \*

Password \*

••••••••

Confirm Password \*

••••••~•

# Surviving Spouse

# Surviving Spouse-Change Member Data

Open the **PRIMARY** member and change out all the **Personal Information** to reflect the **Surviving Spouse**.

## Membership Tab

- Name Fields
- Member Type/Status( if changing)
- Names Options (ie. Statement Name)
- Misc-Gender
- Misc-Profession
- BirthDate
- **Remove** name in Spouse Member field

The screenshot shows the 'Edit Member' page for Mike McKee (Member ID: 1843). The 'Membership' tab is active, and several fields are highlighted with red boxes and arrows:

- Member Type:** Regular
- Status:** Active
- Title:** (None) and **Suffix:** (None)
- First:** Mike, **Middle:** (empty), **Last:** McKee
- Names:** Statement Name: Mr. and Mrs. Mike McKee
- Dates:** BirthDate: 10/1/1954
- Miscellaneous:** Gender: Male, Profession: VP Marketing
- Spouse Member:** [1843A] McKee, Nicole

The 'Dependents' table at the bottom shows the following data:

ID	First Name	Member ...	Age	Birth Day M...
1843A	Nicole	Regular-Sp	58	April

## Update Groups and Pictures

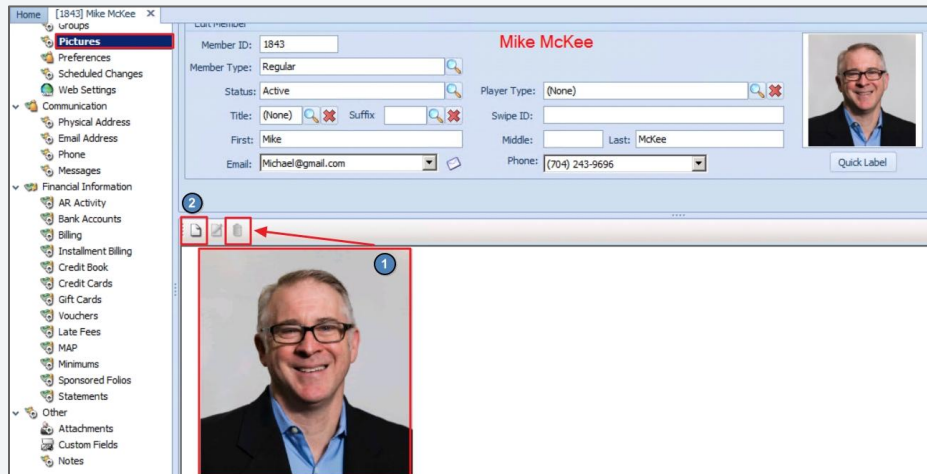
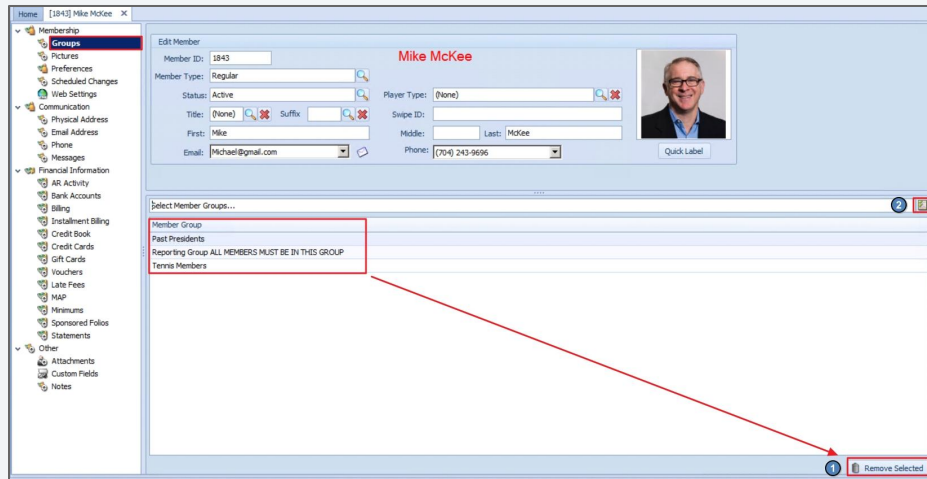
### Groups Tab

1. Remove those that do not apply.
2. Add new groups, using the browse option.

### Pictures

1. Delete photo of the deceased Primary member.
2. Add photo of the Spouse.

**Preferences** - these do not affect the website, however it's good to review these too.



# Update Communications Data

Home [1843] Mike McKee x

Communication

Physical Address

Email Address

Phone

Member ID: 1843

Member Type: Regular

Status: Active

Title: (None)

First: Mike

Email: Michael@gmail.com

Player Type: (None)

Swipe ID:

Phone: (704) 243-9696

## Communication Tab:

Physical Address, Email Address, and Phone

## Commonly updated items include:

- Removing Business Address
- Updating email
- Updating mobile number

Home [1843] Mike McKee x

Physical Address

Member ID: 1843

Member Type: Regular

Status: Active

Title: (None)

First: Mike

Email: Michael@gmail.com

Player Type: (None)

Swipe ID:

Phone: (704) 243-9696

Addresses

[Home] 2810 Tuscarora Lane Waxhaw

[Business] ADP / VP Marketing 1000 Financial Drive

Emails

Michael@gmail.com

Phones

(704) 243-9696 (Home)

(704) 996-0561 (Mobile)

Street 1	Street 2	City	State	Zip Code	Address Category Name	Note
2810 Tuscarora Lane		Waxhaw	NC	28173	Home	
ADP / VP Marketing	1000 Financial Drive	Charlotte	NC	28277	Business	

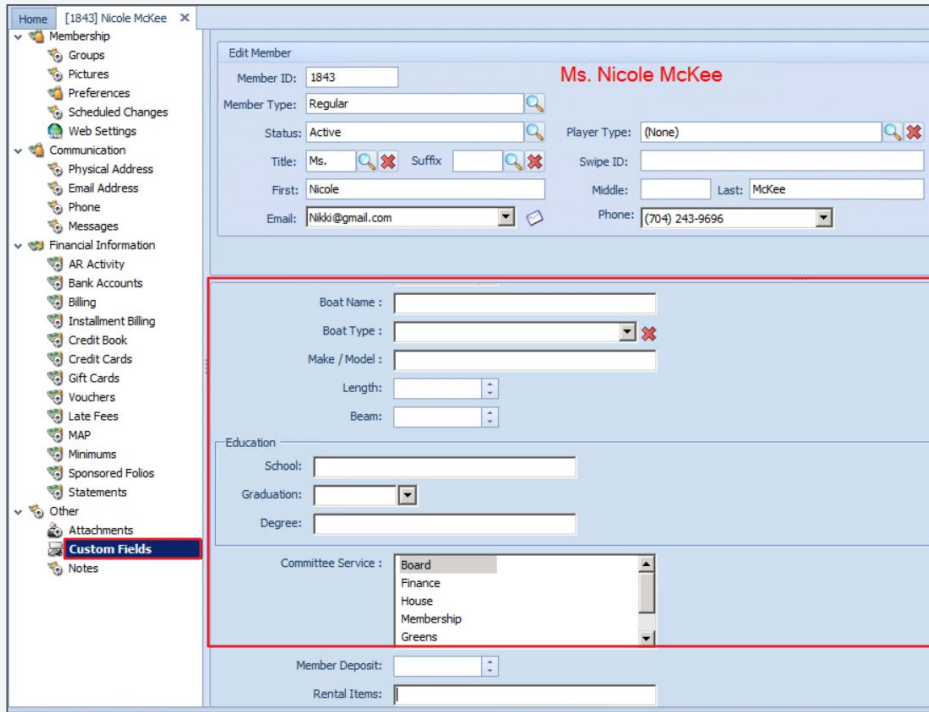


## Custom Fields

Don't forget to review **Custom Fields** when updating the member data!

Some custom fields may be configured to sync to the website.

Custom Fields will vary depending on the Club.



Home [1843] Nicole McKee x

**Membership**

- Groups
- Pictures
- Preferences
- Scheduled Changes
- Web Settings

**Communication**

- Physical Address
- Email Address
- Phone
- Messages

**Financial Information**

- AR Activity
- Bank Accounts
- Billing
- Installment Billing
- Credit Book
- Credit Cards
- Gift Cards
- Vouchers
- Late Fees
- MAP
- Minimuns
- Sponsored Folios
- Statements

**Other**

- Attachments
- Custom Fields**
- Notes

**Edit Member**

Member ID: 1843 **Ms. Nicole McKee**

Member Type: Regular

Status: Active Player Type: (None)

Title: Ms. Suffix: Swipe ID:

First: Nicole Middle: Last: McKee

Email: Nikki@gmail.com Phone: (704) 243-9696

Boat Name :  
Boat Type :  
Make / Model :  
Length :  
Beam :

**Education**

School :  
Graduation :  
Degree :

**Committee Service :** Board  
Finance  
House  
Membership  
Greens

Member Deposit :  
Rental Items :

# Spouse is now the Primary

The primary record should now reflect the information of the **Surviving Spouse (1843)**.

The next step will be to **Resign the Deceased** member, using the original Spouse record (**1843A**).



Member Number	First Name	Last Name	Member Type	Member Status
<b>1843</b>	<b>Nicole</b>	<b>McKee</b>	<b>Regular</b>	<b>Active</b>
1843A	Nicole	McKee	Regular-Sp	Active

Home [1843] Nicole McKee x

- Membership
  - Groups
  - Pictures
  - Preferences
  - Scheduled Changes
  - Web Settings
- Communication
  - Physical Address
  - Email Address
  - Phone
  - Messages
- Financial Information
  - AR Activity
  - Bank Accounts
  - Billing
  - Installment Billing
  - Credit Book
  - Credit Cards
  - Gift Cards
  - Vouchers
  - Late Fees
  - MAP
  - Minimums
  - Sponsored Folios
  - Statements

**Edit Member**

Member ID: 1843 ← **Ms. Nicole McKee**

Member Type: Regular

Status: Active

Title: Ms. Suffix:

First: Nicole Middle: Last: McKee

Email: nikki@gmail.com

Player Type: (None)

Swipe ID:

Phone: (704) 243-9696

Quick Label

**Addresses**

[Home] 2810 Tuscarora Lane Waxhaw, NC 28173 Statements

**Emails**

Nikki@gmail.com Statements

**Phones**

(704) 243-9696 (Home)

(704) 726-6429 (Mobile)

## ↳ Resign the Deceased Member Using the Spouse Record

The screenshot shows the 'Edit Member' interface for Mike McKee. The form fields are as follows:

- Member ID: D1843A
- Member Type: Resigned
- Status: Deceased
- Title: (None)
- First: Mike
- Last: McKee

The table below the form displays a list of members:

Member Number	First Name	Last Name	Member Type	Member Status
1843	Nicole	McKee	Regular	Active
<b>D1843A</b>	<b>Mike</b>	<b>McKee</b>	<b>Resigned</b>	<b>Deceased</b>

Using the **Spouse** Record, change the **Name** Fields, **Member Type** and **Status**.  
**This will make the Deceased member Inactive on the web.**

**Optional:** Add a letter to the start of the member number (Allows you to reuse the member number).  
Change additional profile information.


# Surviving Spouse-Website

Members Staff My Profile Search Export Settings User Statistics

LAST NAME FIRST NAME MEMBER NUMBER EMAIL ADDRESS

mckee      SHOW ALL Active Members

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z


NAME	ADDRESS	PHONE
McKee, Nicole email: Nikki@gmail.com	2810 Tuscarora Lane Waxhaw, NC 28173	

Once the sync from Office to the Website is complete, the result will be Nicole is now the Active Primary Member and Mike has been resigned.

Nicole will no longer be logging into her original **Spouse** account therefore there are a few additional steps needed on the web account.

Members Staff My Profile Search

Nicole McKee (Add to Contacts)

click image for full view 

Membership Type	Regular
Member Since (Join Date)	June 1, 2016
Display Name	
Title	
First Name	Nicole
Middle Name	
Last Name	McKee
Suffix	
Email #1	Nikki@gmail.com

HOME MAILING ADDRESS

Street 1	2810 Tuscarora Lane
Street 2	
City	Waxhaw
State	NC
Zip	28173
Country	
Home Phone Number	
Gender	F
Birthdate	April 8

## Surviving Spouse-Final Web Changes

Reset the **Username** and **Password** back to the default;  
communicate this update to the member.

Check the **Display Name** to ensure it correct reflects the changes.

**Save** the web record.

Membership Type	Regular
Display Name	McKee, Nikk
Member Since (Join Date)	6/1/2016
Membership Expires (Office Status)	12/31/2050
<b>Fill in the boxes below using the Member's information</b>	
Relationship	0 - Self / Primary
Title	
First Name *	Nicole
Middle Name	
Last Name *	McKee
Suffix	
<input checked="" type="checkbox"/> Display this user in the Directory (only affects member viewing, not admin.)	
Web Account Information	
Username *	1843
Password *	.....
Confirm Password *	.....



# Thank you for Attending

Visit our Client Resource Center at [kb.clubessential.com](https://kb.clubessential.com)

# Q&A

