



Membership Maintenance

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

November 17, 2020 1pm EST



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

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



Jen Montano



Justin Brown

1. **How To Resign a Member**
 - a. Status Only Change
 - Disconnect from Billing Member
 - b. Change Member Type and Status
 - Member Type-Not flagged to sync
 - Delete Que
 - c. 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. Expand **Web Site** from the drop down list and select **Clubessential**.
4. Double click the **ClubURL** in blue to open the unification settings.
5. View which **Member Statuses** have been defined as **Inactive**.

The screenshot shows the Clubessential software interface. At the top, the 'System' menu is highlighted with a red box and a circled '1'. Below it, the 'System Settings' option is highlighted with a red box and a circled '2'. In the left-hand navigation menu, 'Web Site' is highlighted with a red box and a circled '3', and 'Clubessential' is highlighted with a red box and a circled '4'. In the main content area, the 'ClubURL' field is highlighted with a red box and a circled '5'. Below this, a table shows the 'Resigned Member Status' settings. A red arrow points from the 'Resigned Member Status' header to the 'Name' column of the table.

Item Category	Member Type	Resigned Member Status	Member Group
Select Member Statuses...			
Name			
Deceased			
Divorced			
Guests			
Inactive			
LOA			
Resigned			
Suspended			

Required Status Change

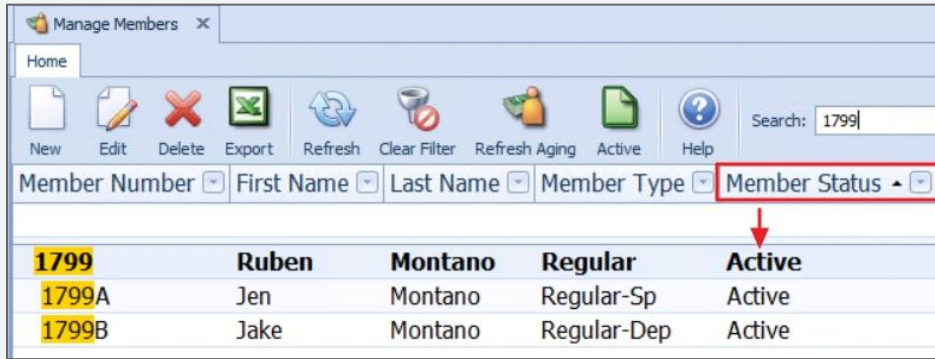
In order for a club to resign a member, the only **REQUIRED** step is to change the Status.

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.
4. 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**.



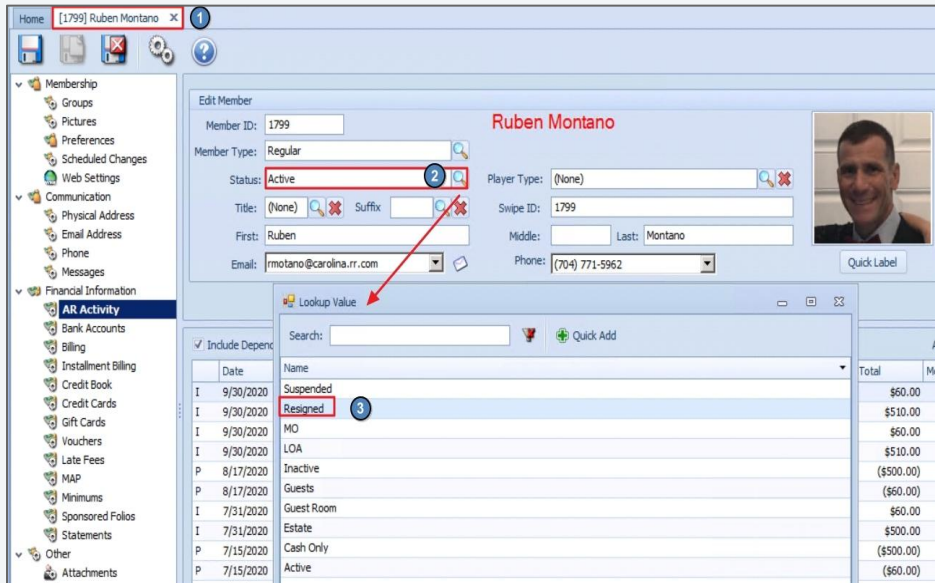
Manage Members x

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	\$51.00	
I 9/30/2020	MO	\$60.00	
I 9/30/2020	LOA	\$51.00	
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 x

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 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
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

Disconnect Resigned Member

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

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

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

Disconnecting the Resigned member is **NOT a required Step**, however it can cause confusion for **ADMIN** on the web if left this way.

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

Member ID: 1799 **Ruben Montano**

Member Type: Regular

Status: Active Player Type: (None)

Title: (None) Suffix: Swipe ID: 1799

First: Ruben Middle: Last: Montano

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

Names

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

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

Web View-Before Resigned Member is Disconnected

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**.

Member View does NOT.

Members Staff My Profile Search Export Settings User Statistics

LAST NAME FIRST NAME MEMBER NUMBER EMAIL ADDRESS 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

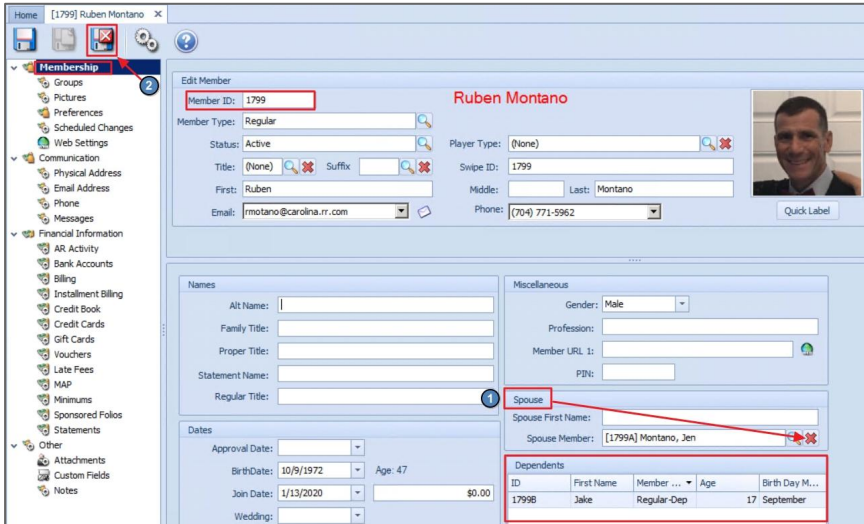
First Name	Ruben
Middle Name	
Last Name	Montano
Suffix	
EDIT THIS USER	
Email #1	rmotano@carolina.rr.com
Email #2	
Other Members	Jen Montano - Spouse / Secondary Jake Montano - Child / Additional

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

Disconnecting in Office

In the **Primary Member's** record, click the red **X** to remove the **Spouse's** name from the Spouse Member box.



Home [1799] Ruben Montano

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 Cards
Gift Cards
Vouchers
Late Fees
MAP
Miniums
Sponsored Folos
Statements

Other

Attachments
Custom Fields
Notes

Edit Member

Member ID: 1799 **Ruben Montano**

Member Type: Regular

Status: Active Player Type: (None)

Title: (None) Suffix: Swipe ID: 1799

First: Ruben Middle: Last: Montano

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

Quick Label

Names

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

Miscellaneous

Gender: Male Profession: Member URL 1: PIN:

Spouse

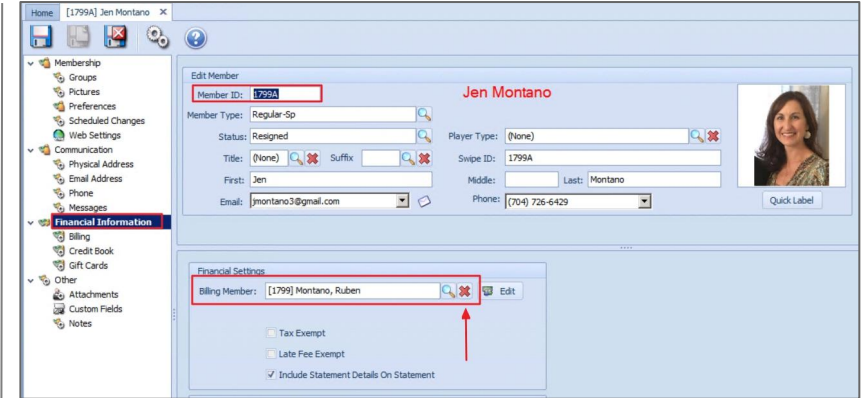
Spouse First Name: Spouse Member: [1799A] Montano, Jen

Dates

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

Dependents

ID	First Name	Member ...	Age	Birth Day M...
1799B	Jake	Regular-Dep	17	September



Home [1799A] Jen Montano

Membership

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

Financial Information

Billing
Credit Book
Gift Cards

Other

Attachments
Custom Fields
Notes

Edit Member

Member ID: 1799A **Jen Montano**

Member Type: Regular-Sp Player Type: (None)

Status: Resigned Player Type: (None)

Title: (None) Suffix: Swipe ID: 1799A

First: Jen Middle: Last: Montano

Email: jmontano3@gmail.com Phone: (704) 726-6429

Quick Label

Financial Settings

Billing Member: [1799] Montano, Ruben

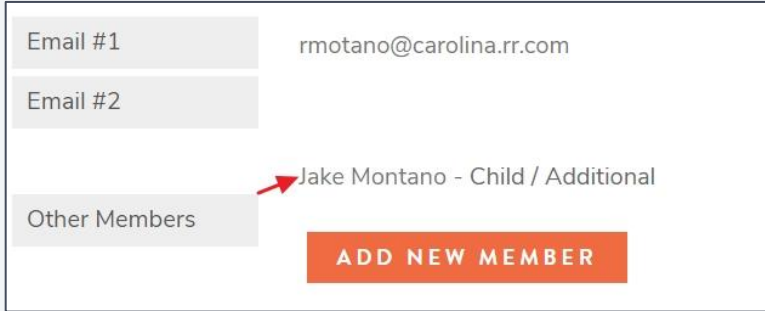
Tax Exempt
Late Fee Exempt
Include Statement Details On Statement



In the **Resigned Spouse** Record on the **Financial Information** tab, click the red **X** to remove the **Billing Members** name.

Save and Close

Goals



Email #1 rmotano@carolina.rr.com

Email #2

Jake Montano - Child / Additional

Other Members

ADD NEW MEMBER

Results

In admin view, the x-spouse is no longer displayed in the **Other Members** tab of the primary member.

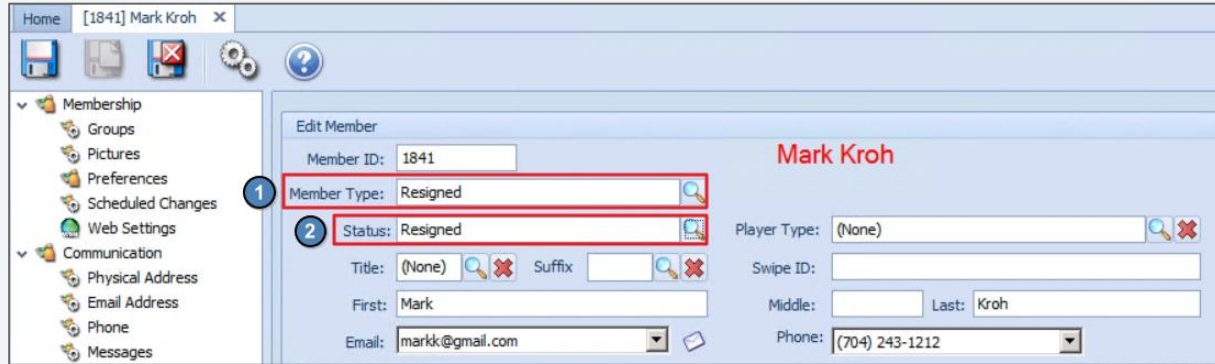
Change Member Type and Status

Member Type and Status Change

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

This process allows additional functionality to **purge Resigned** Members out of the website.

In the Unification settings, make sure the Resigned Member type is **not** flagged to sync.



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:

Phone: (704) 243-1212

Mark Kroh

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

The screenshot shows the Clubessential software interface. At the top, the 'System' menu is highlighted. Below it, the 'System Settings' window is open, showing a tree view on the left with 'Web Site' expanded and 'Clubessential' selected. The 'Integration Settings' tab is active, showing 'Sync Frequency' set to 3 and a table of endpoints. The 'Endpoints' table has the following data:

Name	ClubUrl
EP1	https://demo.grandkeyclub.com

The 'Clubessential Endpoint Editor' window is also open, showing the 'Endpoint Settings' for 'EP1'. The 'Club Url' is 'https://demo.grandkeyclub.com'. The 'Online Orders' section is expanded, and the 'Member Type' dropdown is open, showing a list of member types. The 'Resigned' member type is highlighted in the list.

Unification Settings

Do NOT Sync Resigned Type

To access the **Unification Settings**

1. System
2. System Settings
3. Web site (click the expander)
4. Clubessential>double click website URL highlighted in blue

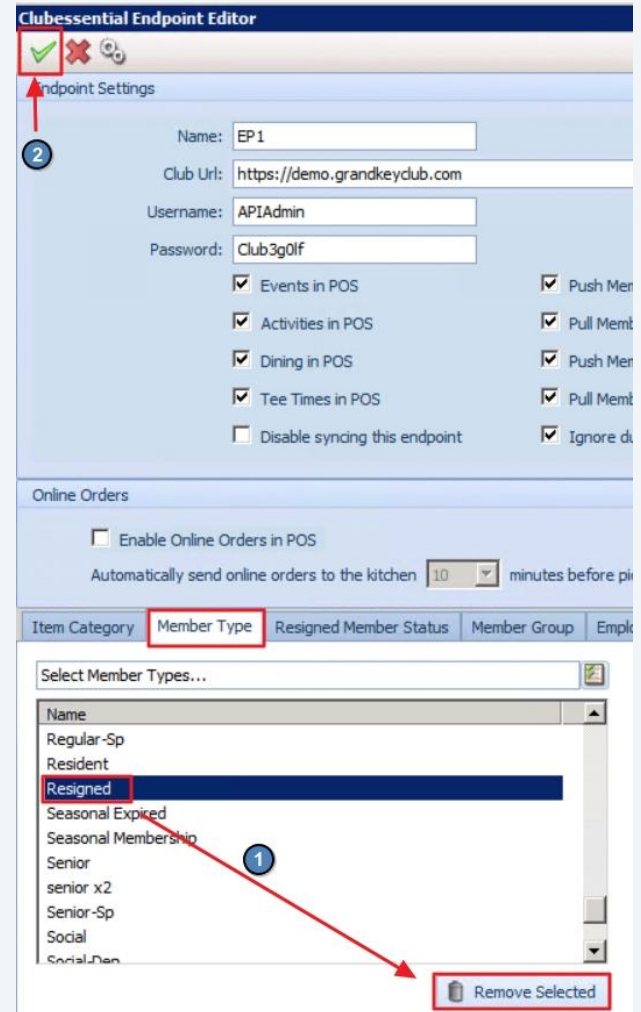
Important: Do **NOT** include the Resigned (Deceased, etc) Member Type to sync.

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

Remove Selected

⚠ 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**

Any member that is in a type **NOT** flagged to sync, will push to this Queue.



This will Delete the members from the Web

Roster Sync Interface

UPDATE STATUS TYPES VIEW LOGS RESET QUEUES

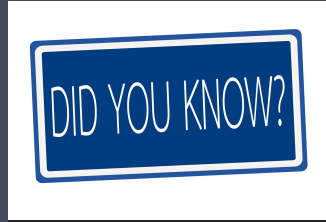
Last Sync Performed 1/1/0001 at 12:00 AM

Delete Queue

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

Enable Warnings Show Addition Times
Additions Queue

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



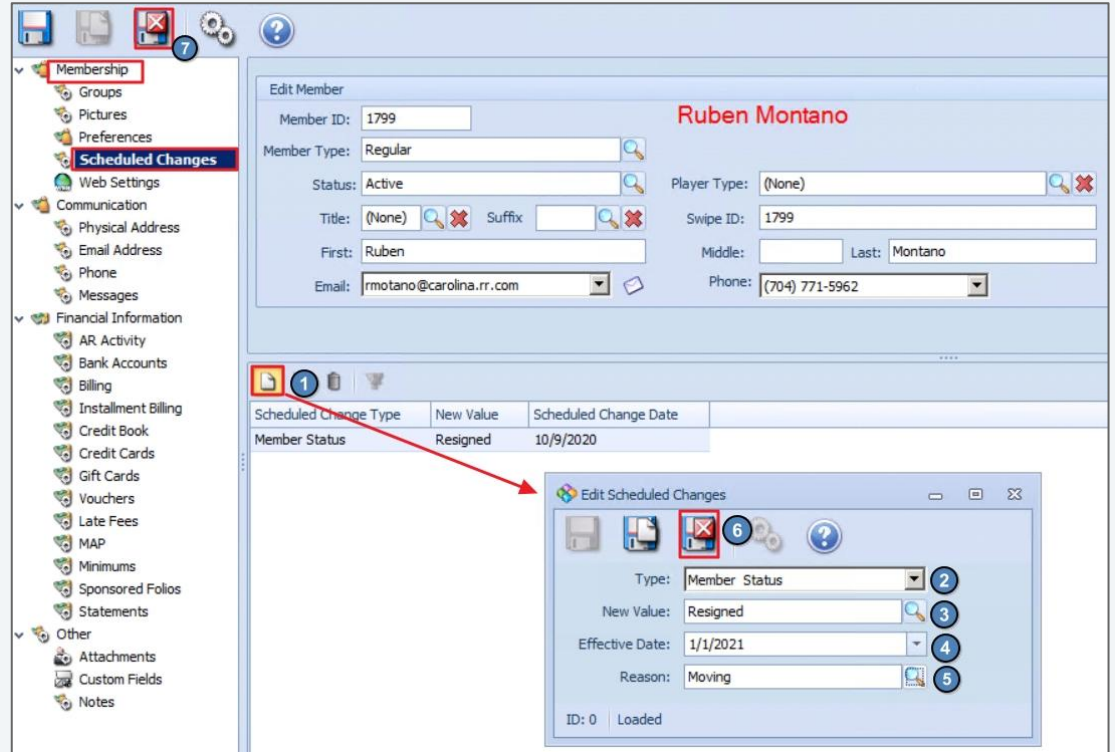
Scheduled Changes

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.



Edit Member

Member ID: 1799 **Ruben Montano**

Member Type: Regular

Status: Active Player Type: (None)

Title: (None) Suffix: Swipe ID: 1799

First: Ruben Middle: Last: Montano

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

Scheduled Change Type	New Value	Scheduled Change Date
Member Status	Resigned	10/9/2020

Edit Scheduled Changes

Type: Member Status

New Value: Resigned

Effective Date: 1/1/2021

Reason: Moving

ID: 0 Loaded

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
1842A	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: (None)

First: Melissa

Email: melissav@aol.com

Player Type: (None)

Swipe ID: (None)

Middle: (None) 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' form for Mike McKee (Member ID: 1843). The form is divided into several sections, with red boxes highlighting specific fields and tabs that need to be updated for a surviving spouse. The 'Membership' tab is selected in the left sidebar.

Membership Tab:

- Member ID: 1843
- Member Type: Regular
- Status: Active
- Title: (None) Suffix: (None)
- First: Mike Middle: Last: McKee
- Email: Michael@gmail.com
- Phone: (704) 243-9696

Names Tab:

- Alt Name:
- Family Title:
- Proper Title:
- Statement Name: Mr. and Mrs. Mike McKee
- Regular Title:

Dates Tab:

- Approval Date:
- BirthDate: 10/1/1954 Age: 66
- Join Date: 6/1/2016 \$0.00
- Wedding: 9/10/2003
- Renew Date:

Miscellaneous Tab:

- Gender: Male
- Profession: VP Marketing
- Member URL 1:
- PIN:

Spouse Tab:

- Spouse First Name:
- Spouse Member: [1843A] McKee, Nicole

Dependents Table:

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

Update Groups and Pictures

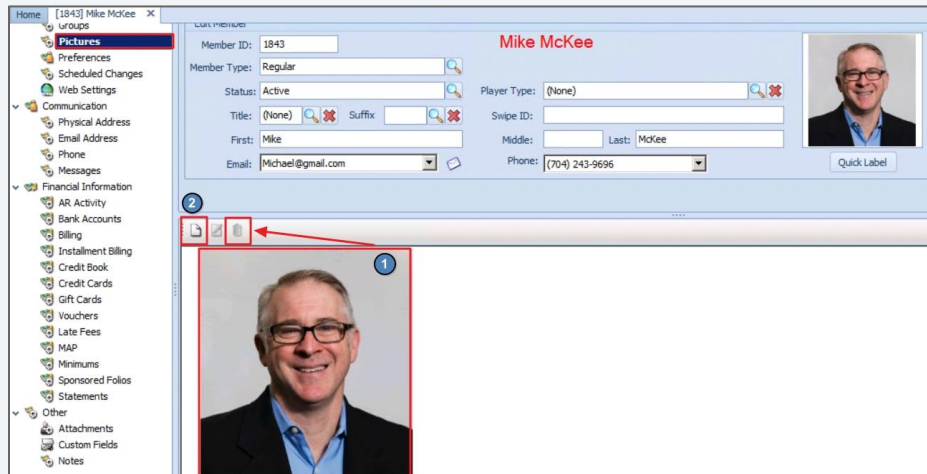
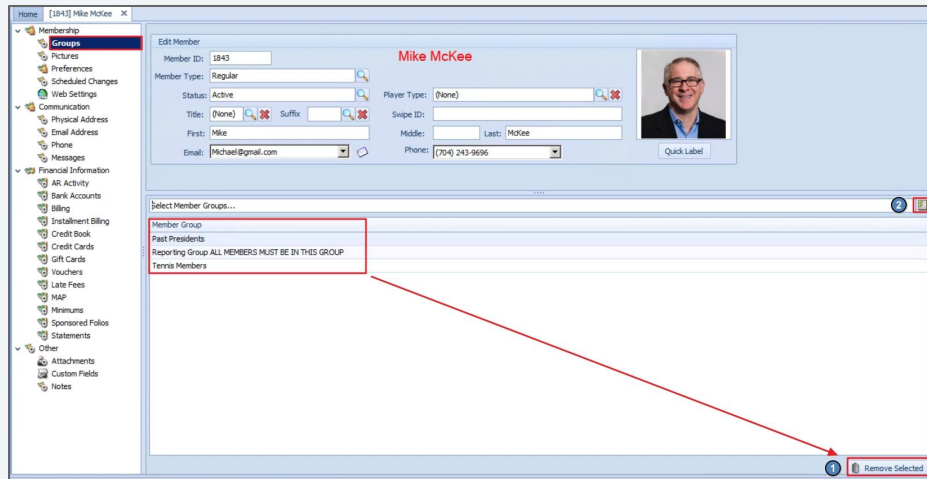
Groups Tab

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

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

Member ID: 1843

Member Type: Regular

Status: Active

Title: (None) Suffix:

First: Mike

Email: Michael@gmail.com

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

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

Member ID: 1843

Member Type: Regular

Status: Active

Title: (None) Suffix:

First: Mike

Email: Michael@gmail.com

Phone: (704) 243-9696

Addresses

[Home] 2810 Tuscarora Lane Waxhaw
[Business] ADP / VP Marketing 1000 Financial Drive Charlotte

Emails

Michael@gmail.com

Phones

(704) 243-9696 (Home)
(704) 996-0561 (Mobile)

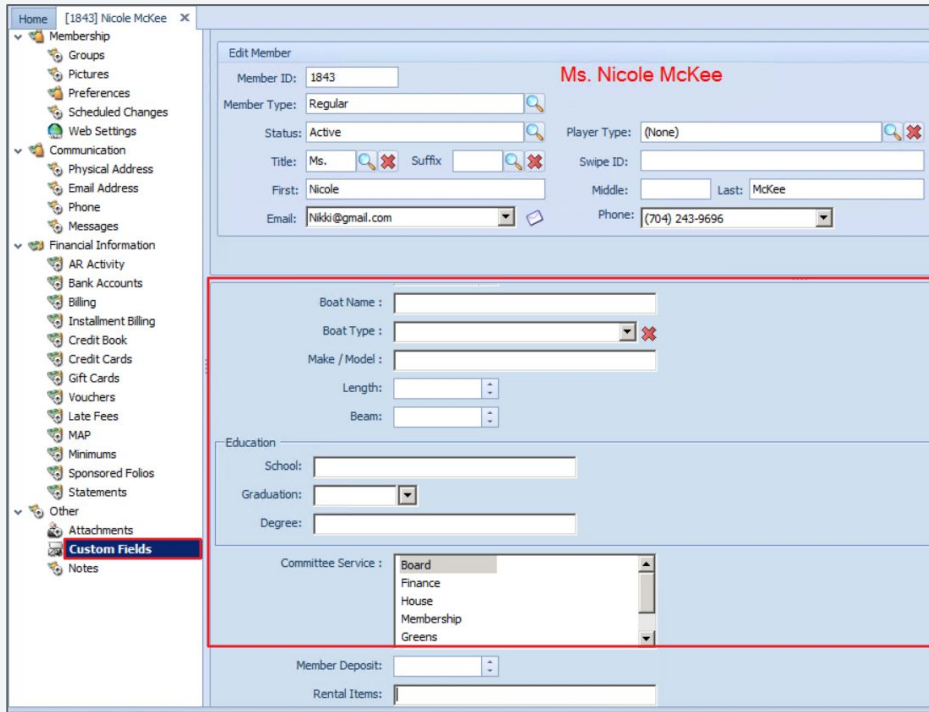
Street 1	Street 2	City	State	Zip Code	Address Category Name	Note
2810 Tuscarora Lane		Waxhaw	NC	28173	Home	
ADP / VP Marketing	1000 Financial Drive	Charlotte	NC	28277	Business	

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

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 :

Other
Attachments
Custom Fields
Notes

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
1843	Nicole	McKee	Regular	Active
1843A	Nicole	McKee	Regular-Sp	Active

Home [1843] Nicole McKee x

- Membership
 - Groups
 - Pictures
 - Preferences
 - Scheduled Changes
 - Web Settings
- Communication
 - Physical Address
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 - Messages
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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 member D1843A, Mike McKee. The form fields are as follows:

- Member ID: D1843A
- Member Type: Resigned
- Status: Deceased
- Player Type: (None)
- Title: (None) Suffix: (None)
- First: Mike Middle: Last: McKee
- Email: nikki@gmail.com

Below the form is a table with the following data:

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

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).
Disconnect the **Billing Member** on the **Financial Information** tab.
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 ) 

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
Fill in the boxes below using the Member's information	
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

Q&A

