CLUBESSENTIAL

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

Agenda

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.**
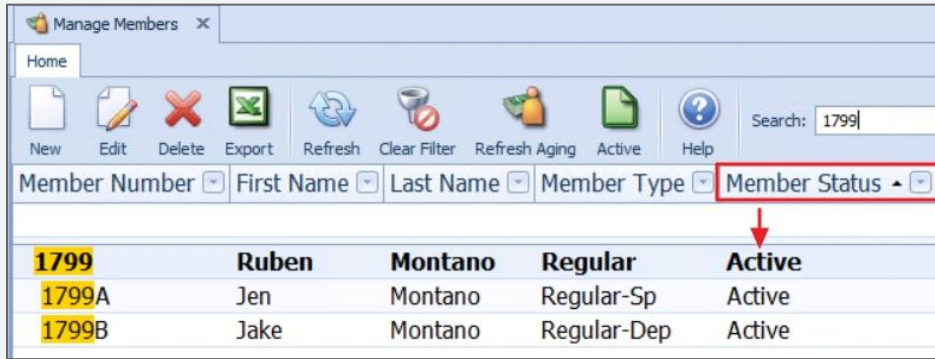
Required Status Change

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.**

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.

Member Expired on Web

- 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

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.

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

montano

SHOW ALL — Active Members

SEARCH

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	

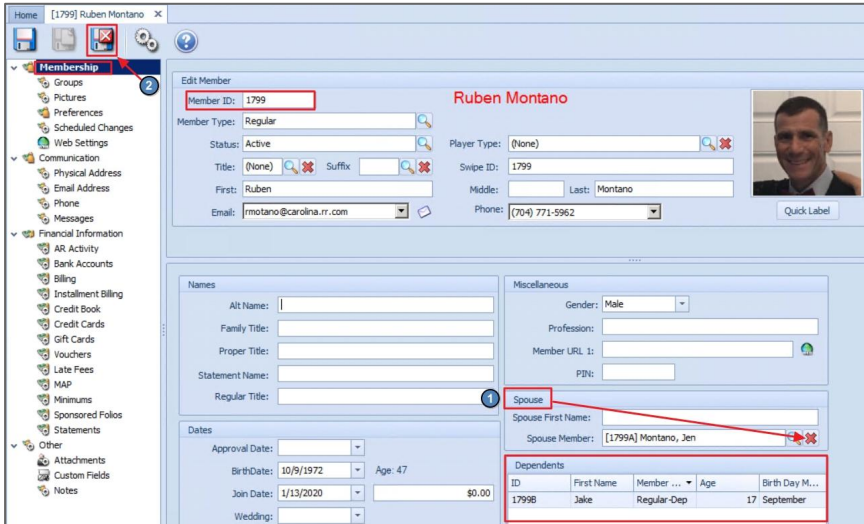A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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

Ruben Montano

(Add to Contacts 📇)

click image for full 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.

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

Save and Close

Web Disconnect

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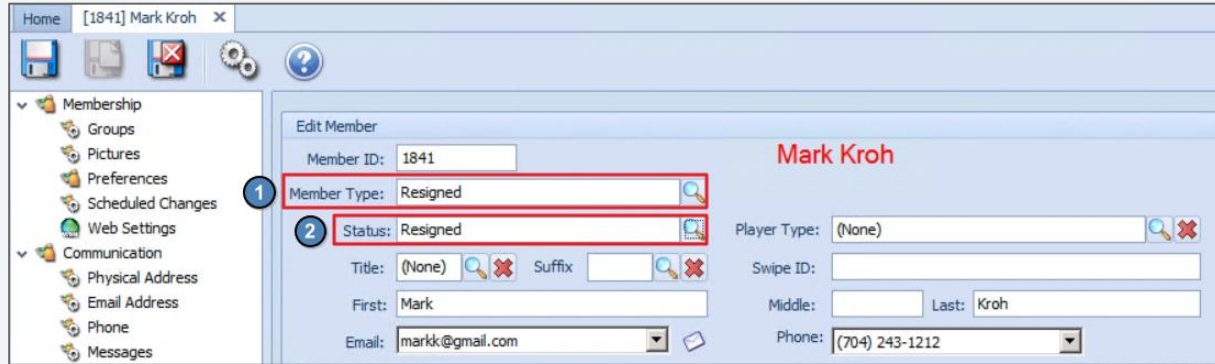
This process allows additional functionality to **purge Resigned** Members out of the website.

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

Unification Settings
Do NOT Sync Resigned Type

To access the **Unification Settings**

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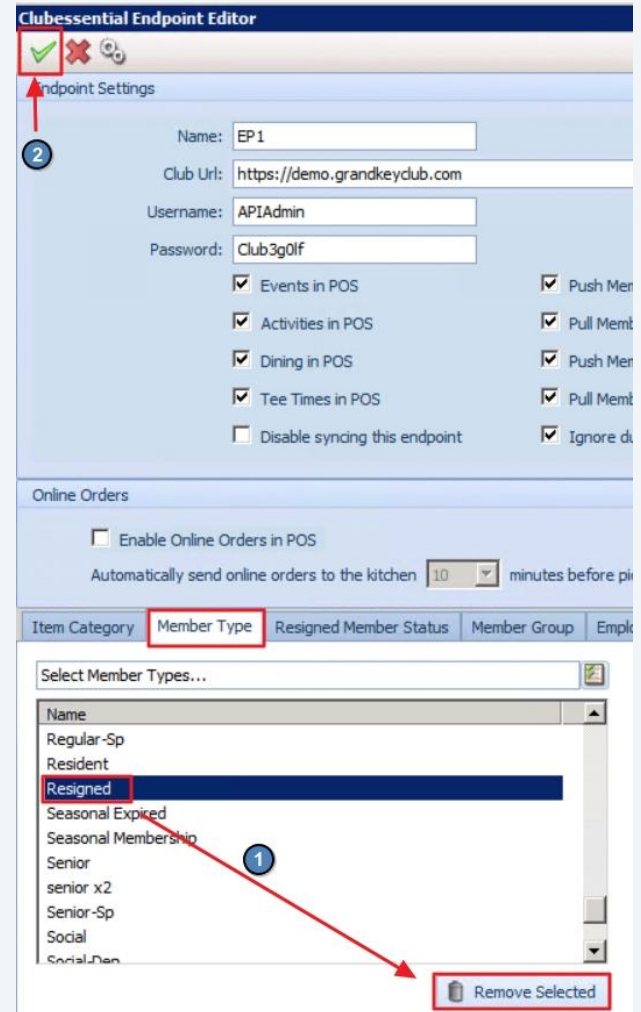4. Clubessential>double click website URL highlighted in blue

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.

| Kroh, Karri | 2800 Tuscarora Lane |
| email: kari@gmail.com | Waxhaw, NC 28173 |

| Kroh, Mark | 2800 Tuscarora Lane |
| email: markk@gmail.com | 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.

Web-Delete Queue

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

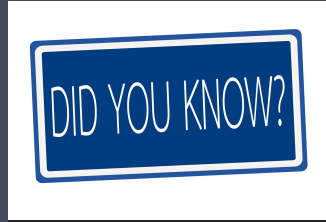UPDATE STATUS TYPES   VIEW LOGS   RESET QUEUES

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

☑ Enable Warnings ☑ Show Addition Times

Delete Queue ❓

Additions Queue ❓

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

②

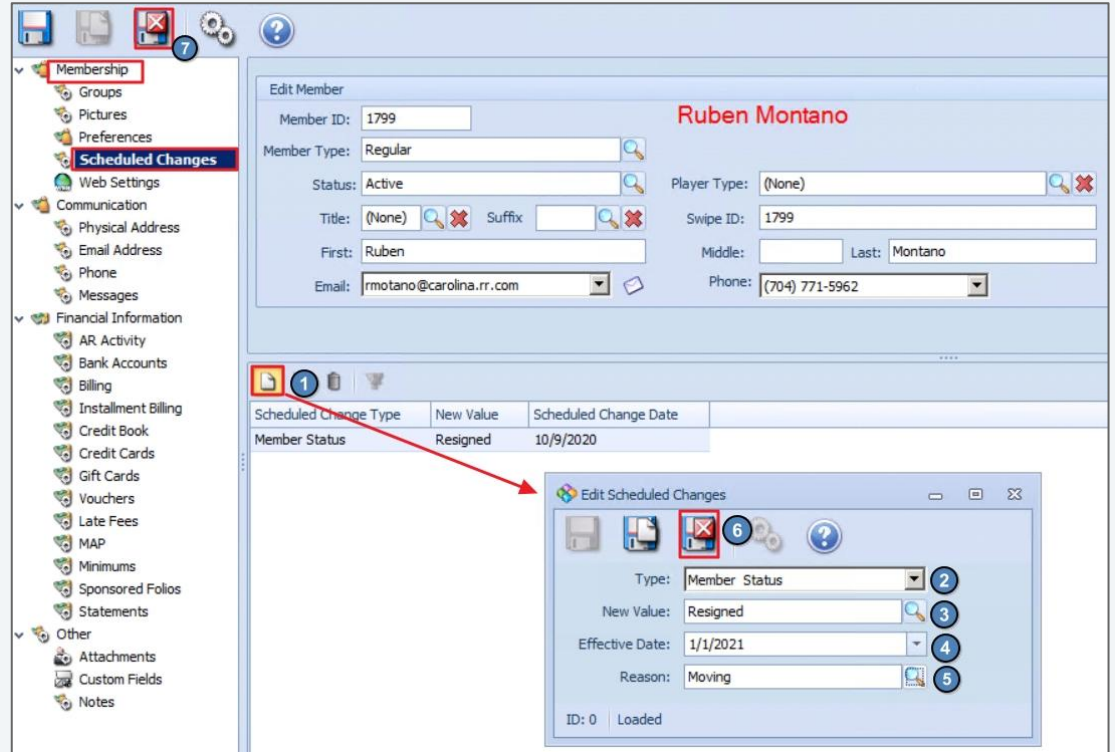KEEP SELECTED   DELETE SELECTED   << MATCH >>   CONFIRM SELECTED   DELETE SELECTED

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!

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.

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

Edit Member

Member ID: X1842A

Melissa Visco

Member Type: Resigned
Status: Divorced
Player Type: (None)

Title: (None)   Suffix: Swipe ID:
First: Melissa   Middle: Last: Visco
Email: melissav@aol.com   Phone: (704) 771-5959

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

Communication
- Physical Address
- Email Address
- Phone
- Messages

Reusing Member Number-Web

Membership Number: x1842A *

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 *: 1842A
Password *: ••••••••
Confirm Password *: ••••••••

Web Account Information

Username *: X1842A

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**

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

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.
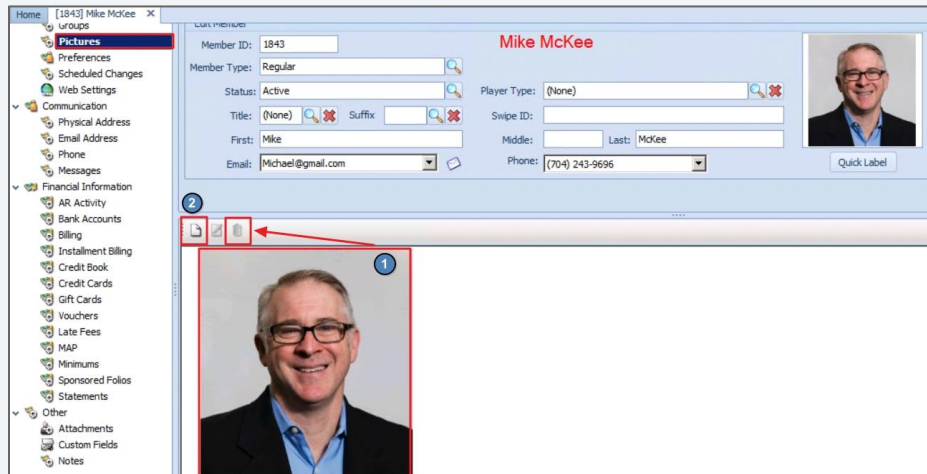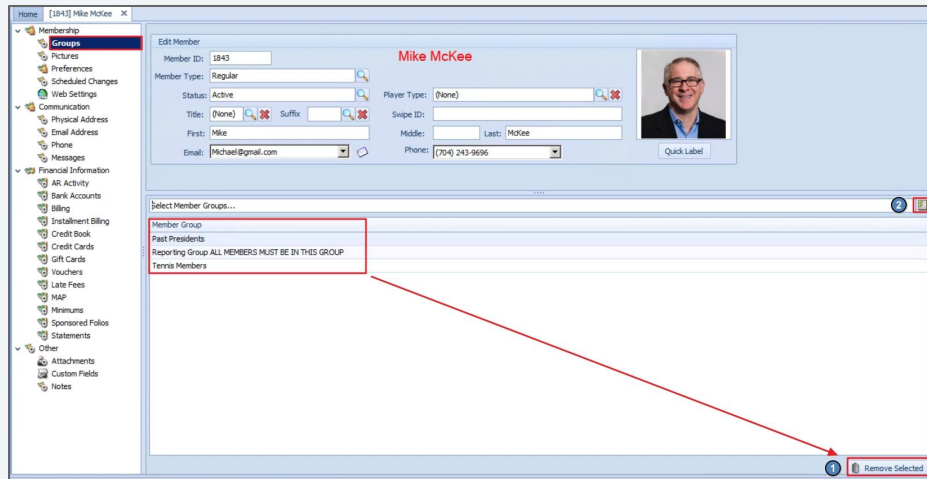
Update Communications Data

Communication Tab:
Physical Address, Email Address, and Phone

Commonly updated items include:
- Removing Business Address
- Updating email
- Updating mobile number

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.

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**).

Resign the Deceased Member Using the Spouse Record

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

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.

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, Nikki
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	

☑ 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