

Membership Maintenance

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

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.



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



G 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.**



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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<u>not</u> 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.
- 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.**

G 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.

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- 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

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	Membership	о Туре		
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ctory not admin.)	Membership Expires (Off Status)	o ïce	➡ October 1,	2020

Member	Number 🖻	First Name 💌	Last Name 🖃	Member Type 🖻	Member Status 🗕 🖻
1799		Ruben	Montano	Regular	Active
1799B		Jake	Montano	Regular-Dep	Active
1799/	4	Jen	Montano	Regular-Sp	Resigned

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.

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G Web View-Spouse Resigned

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.







Change Member Type and Status

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 🗙		
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🎨 Phone		Dhamat law a second second
🏀 Messages	Email: markk@gmail.com	(704) 243-1212

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G Unification Settings-Resigned Member Type

To access the **Unification Settings**

- 1. System
- 2. System Settings
- 3. Web site
- 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.

G 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.

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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







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.

- 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.
- 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.



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



Reusing Member Numbers

Rules to Remember!

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 Numb	er 🖻 First Name	🕑 Last Name	e 🖻 Member Type	e 🖭 Member Status 🔺 💌
1842	John	Visco	Senior	Active
1842A	Melissa	Visco	Senior-Sp	Active

Here we used an \boldsymbol{X} in front of the member number

Home [1842A] Melissa Visco 🗙						
🔒 🔝 😽 📀	•					
🗸 📹 Membership	-					
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Pictures	Member ID:	X1842A		Meliss	a Visco	
Scheduled Changes	Member Type:	Resigned	9			
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🏀 Email Address	First:	Melissa		Middle:	Last: Visco	
Phone Messages	Email:	melissav@aol.com	• Ø	Phone:	(704) 771-5959	•

C Reusing Member Number-Web

	Membership Number	×1842A *]•ι
		Select 🗸	n
	Membership Type	Senior-Sp 🗸	c
	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 🗸	le lf
	Title		
	First Name *	Melissa	П
	Middle Name		V
	Last Name *	Visco	R
	Suffix		
		 Display this user in the Directory (only affects member viewing, not admin.) 	Web Acco
	Web Account Information		
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_	Confirm Password *	•••••	1 0550010

- **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 *	X1842A
Password *	•••••
Confirm Password *	•••••



Surviving Spouse

G 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

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[©] Phone [™] Michael@gmail.com [™] Phone: [™] Quick Label [™] Maxages [™] Michael@gmail.com [™] Quick Label [™] Maxages [™] Make	🕤 Email Address	First: Mike Middle: Last: McKee
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G 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.

G Update Communications Data

Home [1843] Mike McKee X									
Groups	Luit Member			Communicatio	n Tah	•			
🎨 Pictures	Member ID: 1843	Mil	ce McKee	Communicatio		•			
📹 Preferences	Dam das	101		Physical Addres	ss Fr	nail Ac	Idress	and Phone	
🇞 Scheduled Changes	Member Type: Regular	~		r nysicar / aares	ээ, сп			, and mone	
🔮 Web Settings	Status: Active	🔍 Player Ty	pe: (None)						
Communication So Physical Address	Title: (None) 🔍 💢	Suffix Swipe	ID:	Commonly upo	dated	items	s inclu	de:	
🗞 Email Address	First: Mike	Mide	ile:		. D		م برا م ا		
hone				 Removing 	J BUS	iness <i>i</i>	Addre	SS	
Messages	Email: Michael@gmail.com		one: (704) 243-969		emai	il			
✓ ♥♥ Financial Information				• Opdating	Cintu				
S AR Activity				 Updating 	mob	ile nur	nber		
🖏 Bank Accounts	L addresses			1 9					
🧐 Billing	Addresses	Home [1843] Mike McKee ×							
😴 Installment Billing	[Home] 2810 Tuscarora Lane Waxha	w Groups	Curriender						
😴 Credit Book	[Business] ADP / VP Marketing 1000 F	Fi 🍓 Pictures	Member ID:	1843		Mike	McKee		
😴 Credit Cards :		📹 Preferences		Dender					
😴 Gift Cards	Emails	🎭 Scheduled Changes	Member Type:	Regular	4				
3 Vouchers	Michael@gmail.com	Web Settings	Status:	Active	Q	Player Type:	(None)		Q 🗱
Cate Fees		v 📹 Communication	Titlet	(None) 🛇 💓 Suffix		Swine ID+			
MAP	Phones	by Physical Address	nue.			Swipe ID:			
Minimums	(704) 243-9696 (Home)	🧐 Email Address	First:	Mike		Middle:	_	Last: McKee	
Sponsored Folios	(704) 996-0561 (Mobile)	S Phone	Email:	Michael@gmail.com	-0	Phone:	(704) 243-9	696	
Statements		S Messages		,			10002100		
		 Financial Information 							
		C AR Activity							
		🖏 Bank Accounts							
		🧒 Billing		*					
		🧐 Installment Billing	Street 1	Street 2	City	State	Zip Code	Address Category Name	Note
		🧐 Credit Book	1 2810 Tuscaror	a Lane	Waxhaw	NC	28173	Home	
		🦁 Credit Cards	ADP / VP Mark	eting 1000 Einancial Drive	Charlotte	NC	28277	Business	
		Cift Cards	HUP / YP Mark	cong 1000 mandar Drive	Charlotte	ne.	20211	Duain 1000	

Home [1843] Nicole McKee ×		
V C Membership	Cita Manhar	
Groups	cuit member	
Pictures	Member ID: 1843 MIS. NICOle MICKee	
Preferences	Member Type: Regular	
Scheduled Changes		
Web Settings	Status: Active Status: (None)	4 🗱
Communication	Title: Ms. C 🗶 Suffix C 🗶 Swipe ID:	
Physical Address		
Email Address	First: Nicole Middle: Last: McKee	
Phone	Email: Nikki@gmail.com Phone: (704) 243-9696	
Messages		
Given Stranger S		
AR Activity		
Bank Accounts		
Billing	Boat Name :	
Installment Billing	Boat Type :	
Credit Book		
Credit Cards	Make / Model :	
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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.



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 Numb	er 🖻 First Name	🖻 Last Name	Member Type	Member Status 🔺 🖻
1843	Nicole	McKee	Regular	Active
1843A	Nicole	McKee	Regular-Sp	Active

Home [1843] Nicole McKee									
Membership									
Groups	Edit Member								
Pictures	Member ID:	1843		_	Ms. Nico	le McKe	e		
📹 Preferences									
Scheduled Changes	Member Type:	Regular		4					
Web Settings	Status:	Active		Q	Player Type:	(None)		0, 🗶	
🗸 📹 Communication									
🏀 Physical Address	Title:	Ms.	Suffix	122	Swipe ID:				
\delta Email Address	First:	Nicole			Middle:		Last: McKee		
🎨 Phone	E1	Mildi (Demail cam		~	Phone:	(70 4) 242 04		1	Ouick Label
🎨 Messages	Email:	INKK @gmail.com		2		[(/U4) 243-90	596		Quick Laber
✓ ♥♥ Financial Information									
S AR Activity									
Counts Bank Accounts							****		
3 Billing	Addresses								
😚 Installment Billing	[Home] 2810 Tus	carora Lane Waxha	w, NC 28173		Statemen	ts			
Credit Book	1								
😴 Credit Cards :	Emails								
Gift Cards	Nikki@amail.com				Statemen	te			
Vouchers	r ind egnal.com				butemen				
🏹 Late Fees	Phones								
MAP	(70.4) 242 0505	()							
Minimums	(704) 243-9696	(Home)							
Sponsored Folios	(704) 726-6429	(MODIIE)							
Statements									

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). Change additional profile information.

G Surviving Spouse-Website

AST NAME	E		FIRST	NAME	E		MEM	BER N	UMBER	2	EMA	IL AD	DRESS											
mckee																S E.	A R C H		SHO	W ALL	Acti	ve Me	mbers	`
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	NAME								AI	DDRE	SS						рно	NE						

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.

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

G 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 v			
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 *	МсКее			
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