

- Impersonating a Member

2016 - Fall Edition

User Guide - Table of Contents

[Overview](#)

[Use Cases](#)

[Before Using Impersonate Member](#)

[Accessing the Tool](#)

[Accessing Member Profiles to Make Changes](#)

[How to Stop Impersonating](#)

[FAQs](#)

[Best Practices](#)

Overview

The **Impersonate a User** tool allows a Club to imitate any user at the club; **staff** or (more commonly) **member**. When using this feature, you can **view statements, sign up for events, update a profile** as that individual without having to use their login credentials. This feature enables Clubs to improve their Member experience by providing the best troubleshooting and/or assistance to them when a question or issues arises. Clubessential needs to enable this feature for a Club to utilize it. The Club can determine whether they would like Admins and/or Editors to have use of the tool.

Use Case(s)

Clubs can use this tool and essentially be the member they are **impersonating** while still being logged in as themselves. For instance, Mr. Smith called the Club with an issue that he was not sure whether or not his dining reservation went through the system. The Club Admin could impersonate Mr. Smith and verify what he is seeing in the system, to help troubleshoot the issue.

Before Using Impersonate Member

Ensure to use great care when utilizing the **Impersonate a User** tool. By **impersonating** a user, you are able to **access their information**. Make sure you get **approval** to make any final changes with the member.

Since the system views you as that member when impersonating them, ensure to gain approval from the Member prior to making any changes to their account, or signing up for reservations, etc. For example, if you impersonate a member (as a test) to sign up for a reservation that has an associated cost and forget to cancel their reservation, the

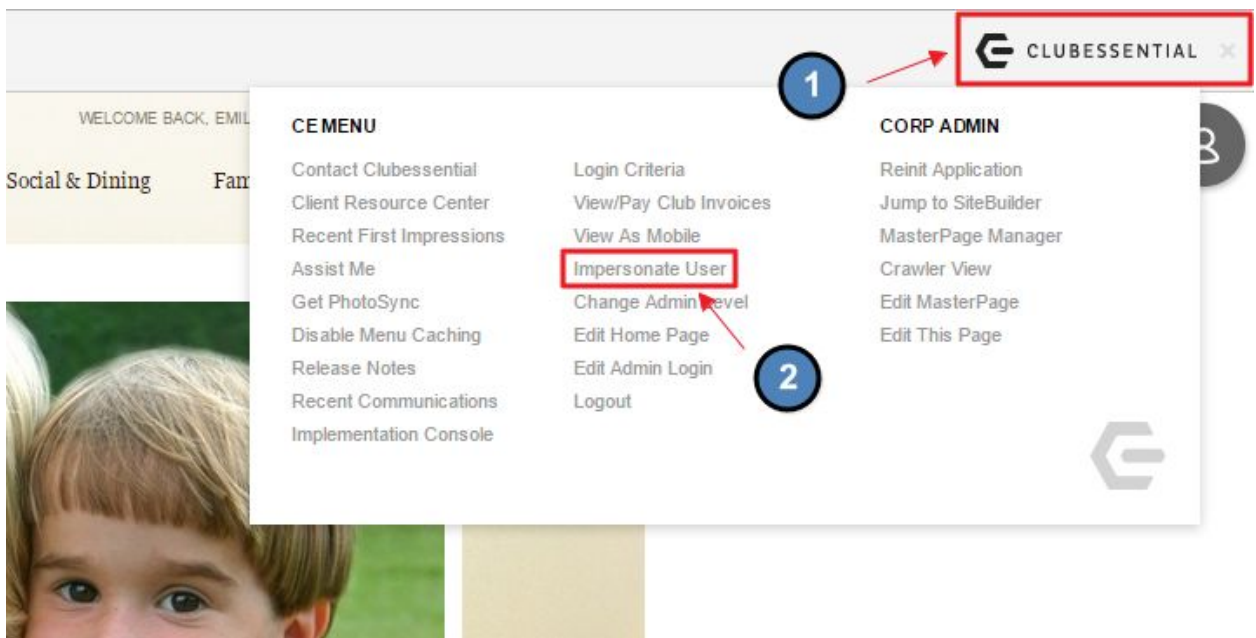
member could become upset, and the Club could potentially experience a loss of future business.

Accessing the Tool

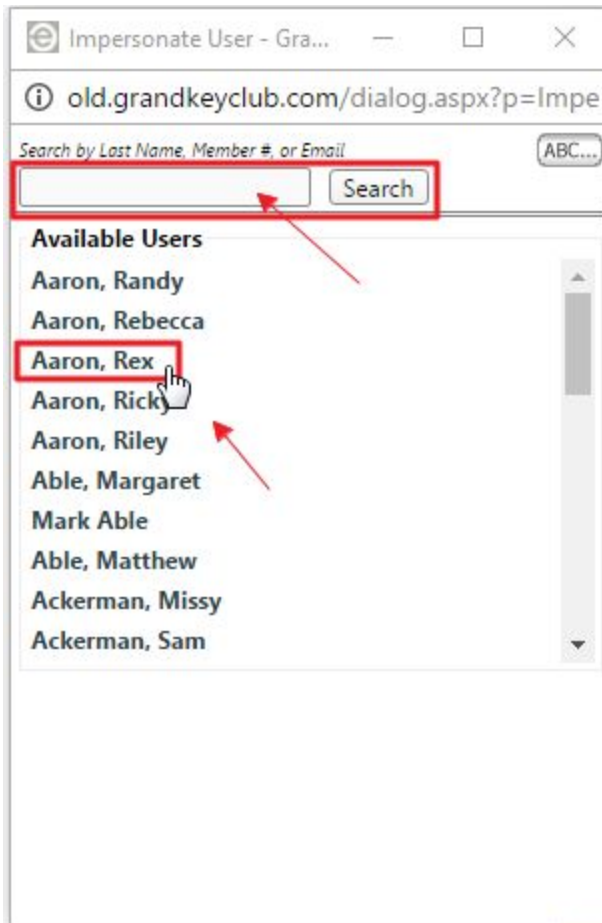
Impersonate User may be set up for **Admins** only or **Admins** and **Editors** based on your club's needs. **Admins** can only request that this feature be enabled to **Editor** use.

To access the **Impersonate User Tool**, follow the steps below depending on your access role.

If you are an **admin** at the club, hover over the **Clubessential tab** on the **top right** side of the site and **click "Impersonate User"** function.



This will launch the **Impersonate User** pop up where you may **scroll** or use the **search box** to find the member to impersonate. Simply, **click the member name** to begin **impersonating**.



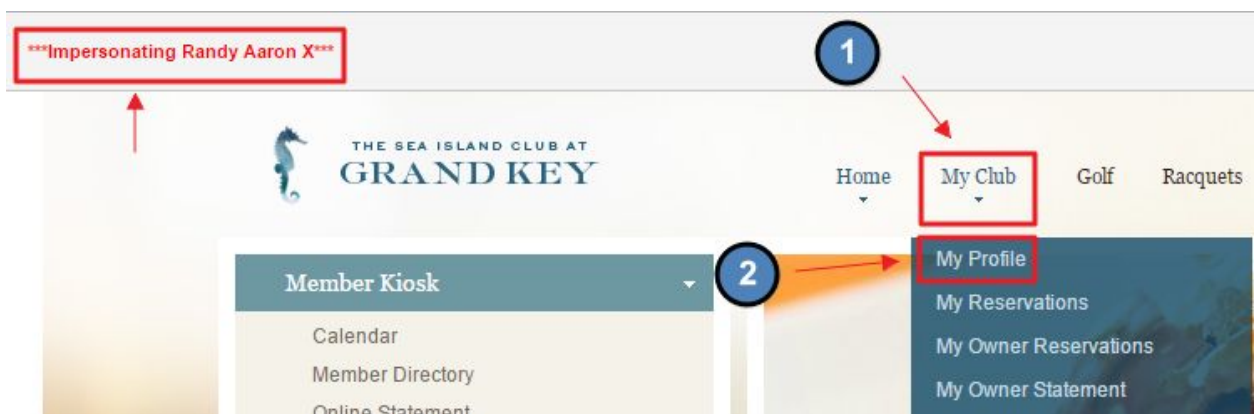
If **Impersonate User** is enabled for **Editors**, they may follow these steps: **navigate to the Member Directory and click on the member profile they wish to impersonate. Click the Impersonate User button located at the top right of the member profile.**

Once you are **impersonating** the **member**, you will notice the "**Impersonating Member Name X**" in the **Admin Bar**.



Accessing Member Profiles to Make Changes

To make changes while impersonating, just **impersonate the member** and **click on My Profile**.



You can make the changes such as having **certain fields be visible to the directory, update email and names, etc.**

Username*	<input type="text" value="raaaron"/>	Change Username
Password*	<input type="password" value="*****"/>	Change Password
Primary Email	<input type="text" value="andy@clubessential.com"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/> Receive Emails to this Address?	
	<input type="checkbox"/> Receive notification of private messages?	
Text Messaging Address		Edit Help

Home Address		
<i>Street 1</i>	<input type="text" value="123 Block Road"/>	<input checked="" type="checkbox"/>
<i>Street 2</i>	<input type="text"/>	<input checked="" type="checkbox"/>
<i>City</i>	<input type="text" value="Austin"/>	<input checked="" type="checkbox"/>
<i>State</i>	<input type="text" value="TX"/>	<input checked="" type="checkbox"/>
<i>Zip</i>	<input type="text" value="78731"/>	<input checked="" type="checkbox"/>
<i>Country</i>	<input type="text"/>	<input checked="" type="checkbox"/>
<i>Home Phone</i>	<input type="text" value="444-888-5454"/>	<input checked="" type="checkbox"/>

If you look at the Profile Update report you will see the changes being made as that member, not the staff member impersonating the member.

How to Stop Impersonating

When you **Impersonate** a member you will see a name of the impersonated member in **red with an X next** to their name. To stop **impersonating** and go back to your credentials, just **click on the red X**.



FAQs

Q: Why is this tool needed?

A: By impersonating someone you can see any particular issue that they might be seeing. If they are having a statement issue, you can impersonate them and click to view their statements as them.

Q: Can I make reservations for members using this?

A: You may make reservations for users by using the **Impersonate User** tool. Just **Impersonate** that member and use the tools on the website as a member would. Note: make sure you obtain permission before making any reservations or changes within a member's account.

Best Practices

1. Using the **impersonate member** tool, you are able to access the site as another user without having to log in as them. This is especially useful when helping a member troubleshoot an issue they are having.
2. **Impersonate User** is not enabled by default for **Club Admins**. If this feature is not yet enabled, contact Clubessential to enable this feature for you. You may decide who may use this feature: **Admins or Editors**.
3. Once you are through **Impersonating a User**, be sure to click the **Red X** by the user's name in the **Admin Bar** to stop **impersonating** that user.