Roster Sync

2016 - Winter Edition

Roster Sync - Table of Contents

Roster Sync Overview

Roster Sync is a tool that utilizes the **member roster** your **Club's accounting software** to populate the **Online Member Directory.**
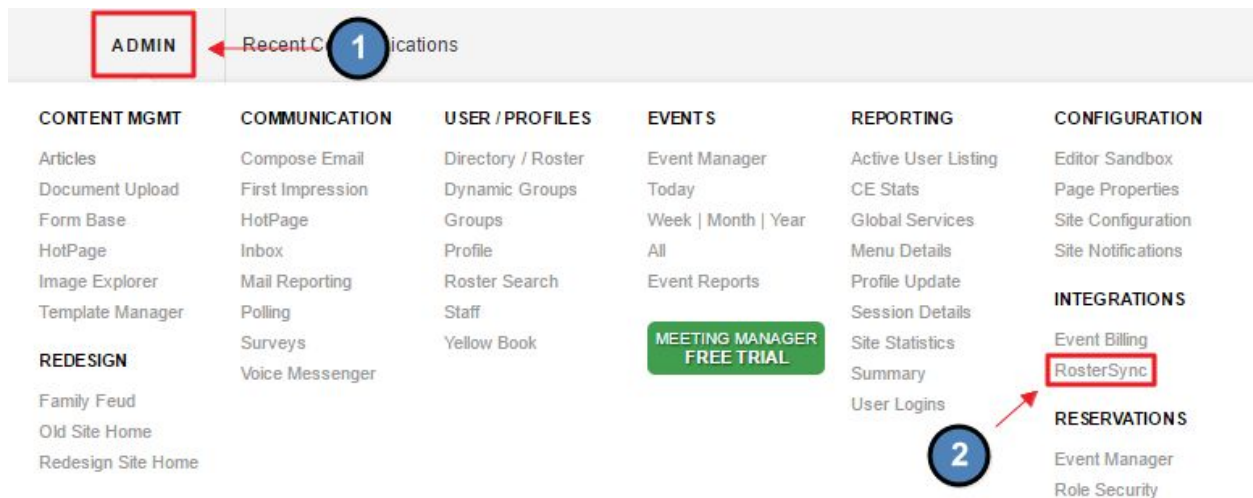
Use Case(s)

This is used to **sync the data** in **club accounting software member roster** to the **Online Member Directory**.

Accessing the Tool

Only **Admins** have the ability to access **Roster Sync**. Follow the steps below, if you are an **Admin:**

Hover over the **Admin** bar in the top left.

Click on **"Roster Sync"** in the Interfaces sections.

Understanding the Additions/Deletions Queue

The **Additions/Deletions Queue** in the **Roster Sync** interface is one of the most crucial components of a successful **Roster Sync.**   It is the final confirmation of any **member added or removed** from the **Club Directory**. A full understanding of this **queue** is necessary to ensure a successful **sync** and the avoiding of members appearing in your **Club Directory** more than once. The **Additions/Deletions Queue** must be managed after **every sync** in order to **update** the **Club Directory.**

ROSTER SYNC INTERFACE

| UPDATE STATUS TYPES | VIEW LOGS | RESET QUEUES |

Last Sync Performed 3/2/2015 at 1:33 PM

☑ Enable Warnings ☑ Show Addition Times

Delete Queue ⓘ

Additions Queue ⓘ

1130(0) - Karen Coolidge
7200(0) - John Denver

2943(0) - John Haim
3281(0) - Sam Sergio

| KEEP SELECTED | DELETE SELECTED | « MATCH » | CONFIRM SELECTED | DELETE SELECTED |

Additions

The **Additions queue** is used to pull in **new members** that **match** the **status types** you want to show in your **Club's Directory**. *You will need to confirm every new addition.*

After a **sync** is performed, **new members** that are to be added to the **Club Directory** will appear in the **Additions Queue.**

Additions Queue ⓘ

2943(0) - John Haim

3281(0) - Sam Sergio

CONFIRM SELECTED   **DELETE SELECTED**
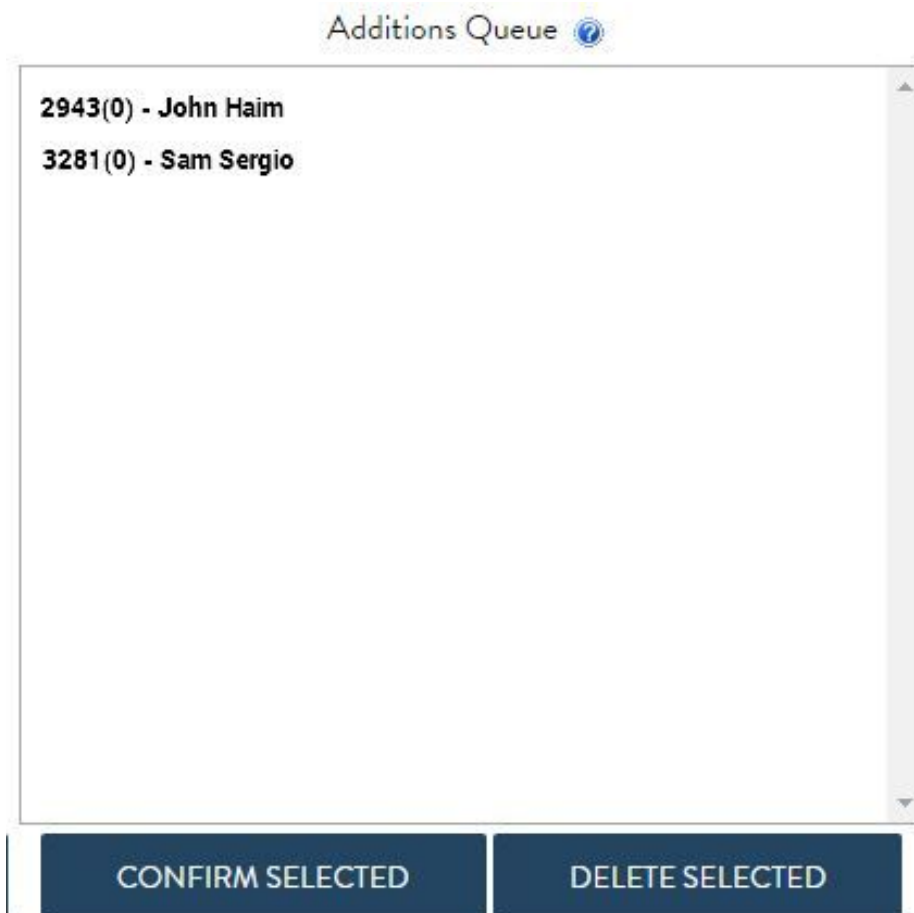
First, verify that the **members** in the **Additions Queue** should be added to the **Club Directory**.

Next, **click** on the member's name(s), then **click Confirm Selected** to **add** the **members** to the **Club Directory.**


Note: if **members** are NOT managed in the **Additions Queue** first, then they will NOT be added to the **Club Directory.**

Deletions

If a **member** is no longer with the Club or is moved to a status type that your Club does not wanting showing up in the **Club's Directory**, they will show up in the **Deletions Queue** for you to confirm their **removal** from the **Club Directory**.
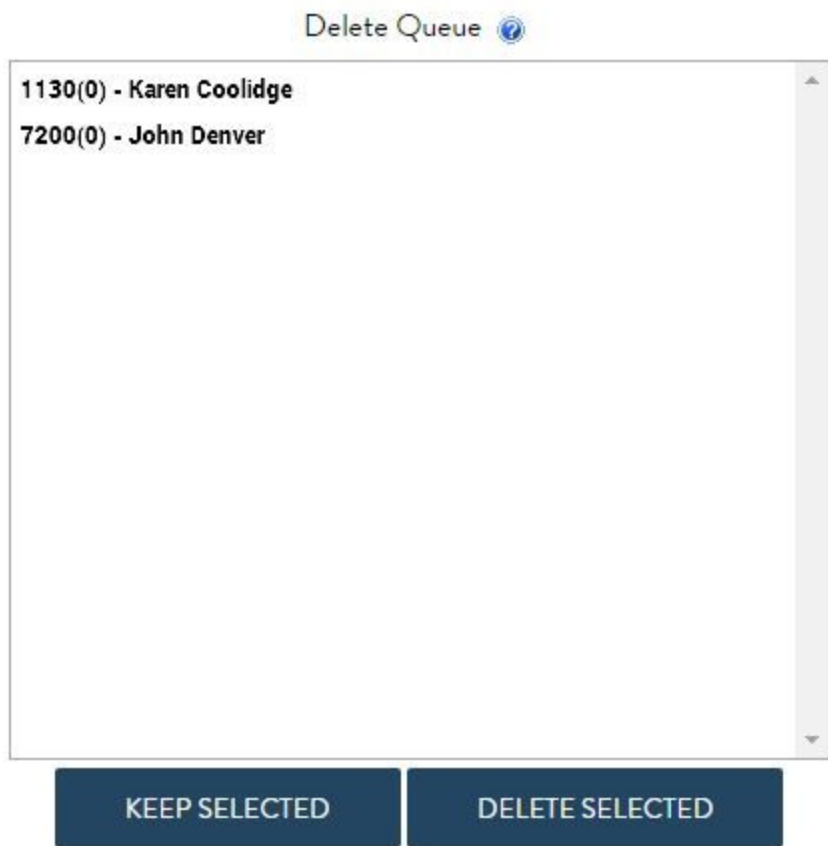
Click on the member's name, and then click "**Delete Selected**" to remove from the website.
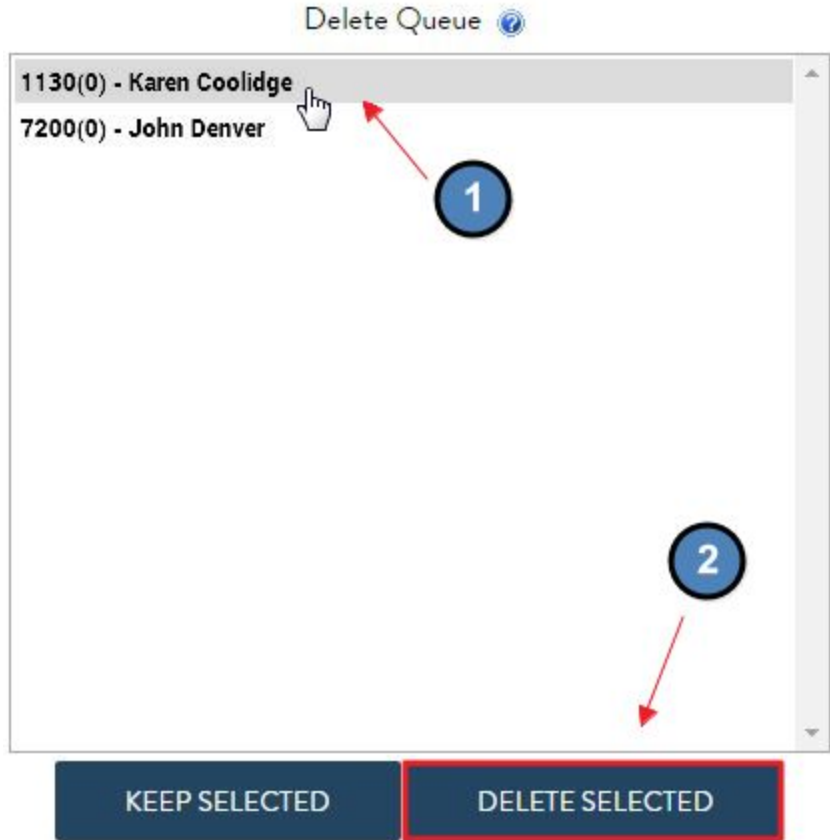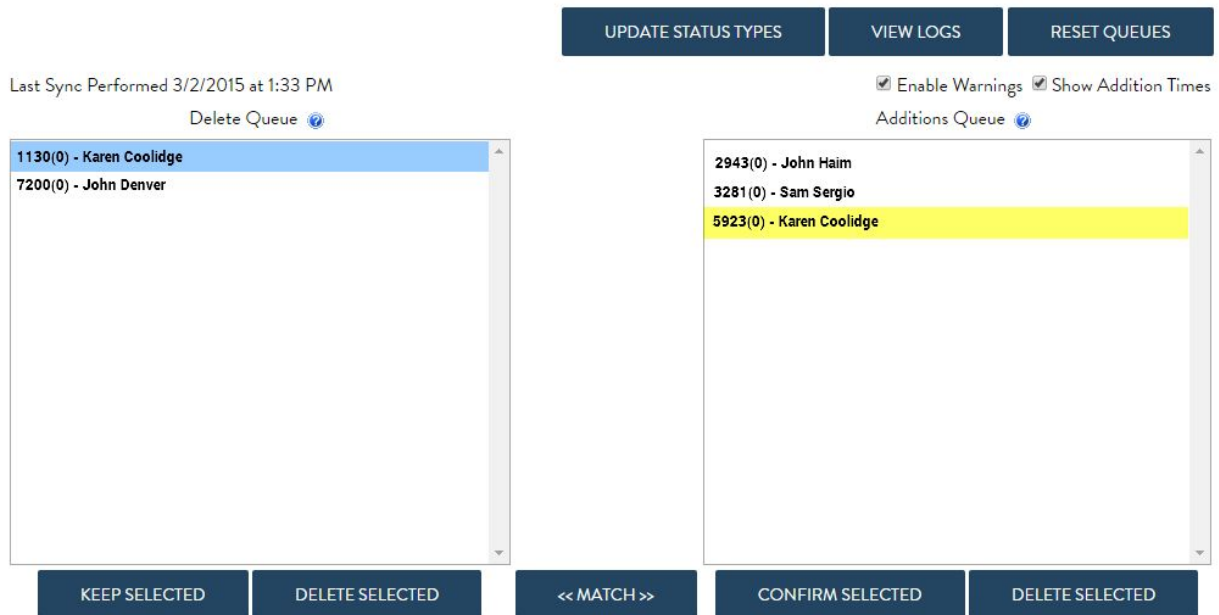

Conversely, you may **click "Keep Selected"** to keep the member on the website. If the member was added to the **Delete Queue**, but shouldn't be here, check their settings in the accounting system.

Matching

Members may end up in the **Additions Queue** and the **Deletions Queue** on the same **sync.**

If a member's **member number** has been changed, then the **old member number** will appear in the **Deletions Queue,** while the **new member number** will appear in the **Additions Queue.**

ROSTER SYNC INTERFACE

| UPDATE STATUS TYPES | VIEW LOGS | RESET QUEUES |

Last Sync Performed 3/2/2015 at 1:33 PM

☑ Enable Warnings ☑ Show Addition Times

Delete Queue 🔵

Additions Queue 🔵

1130(0) - Karen Coolidge
7200(0) - John Denver

2943(0) - John Haim
3281(0) - Sam Sergio
5923(0) - Karen Coolidge

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

If both **member numbers** are kept, then there will be a duplicate entry for that member. In order to ensure nothing is lost, the **Queue** has an option for **Matching.**

Matching reconciles the differences between the two accounts while deleting the **old account** and keeping the **new account.**

Highlight both accounts, and then **click Match.**

ROSTER SYNC INTERFACE
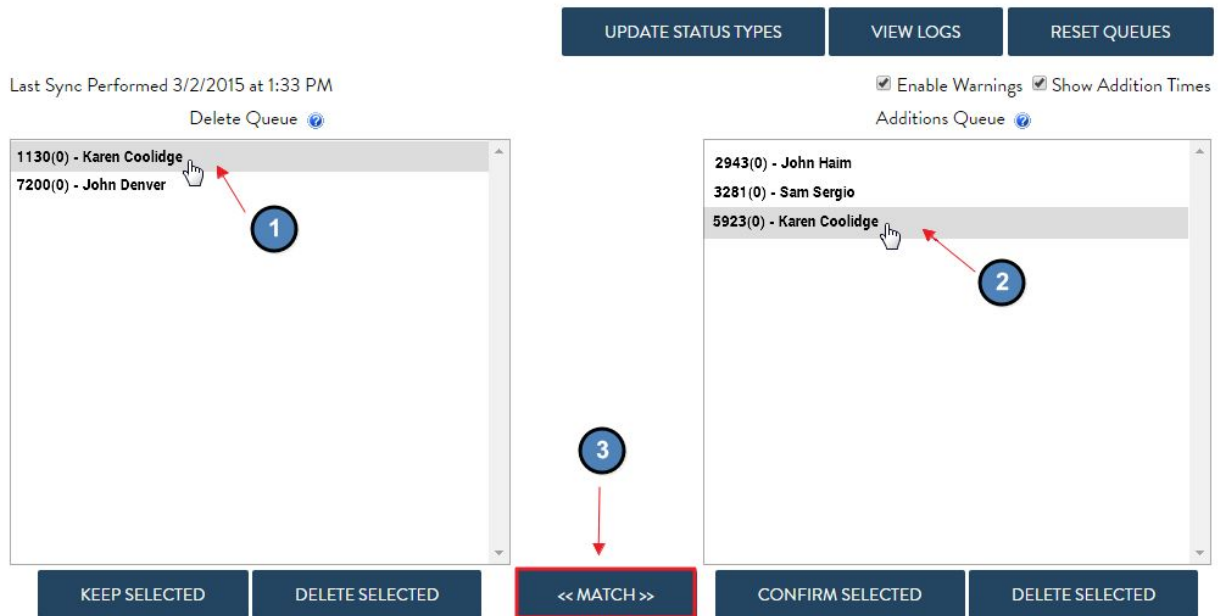
Selecting Status Types

In some cases, your Club may make a new status types for new members coming through or decide that other **status types** should have **access to the Club website**.

Click Update Status Types to review, or make changes, to the **Status Types** allowed in the **Club Directory.**

ROSTER SYNC INTERFACE

The **Status Type** interface will launch and list all available **Status Types. Click the boxes** to **check mark statuses** that should be active on the website.
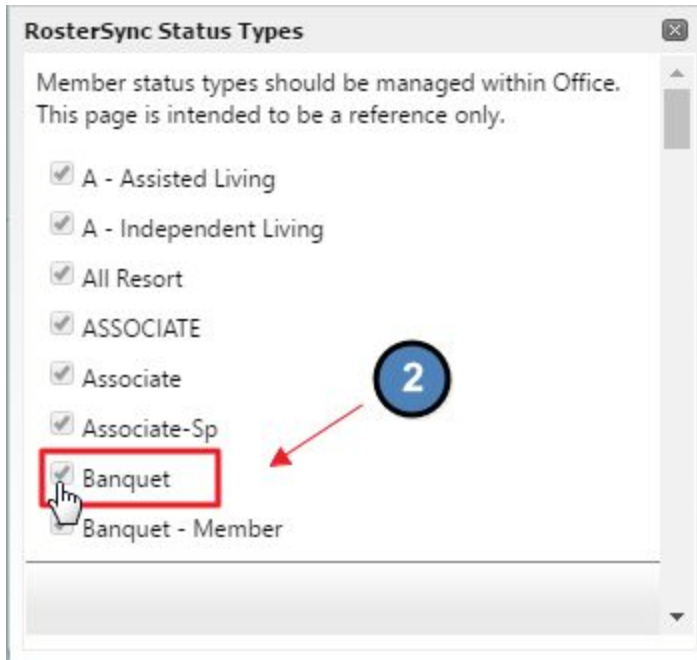
Next, run **Roster Sync** again and the **members** with the newly selected **status type** will show in the **Additions Queue**.

FAQs

Q: I performed a **Roster Sync**, but new members are NOT showing in the **Directory.** Why?

A: After every **Roster Sync,** the **Additions/Deletions Queue** must be managed in order to **add or delete members** from the **online directory.** Go to the **Additions/Deletions Queue** to confirm **members** that should be **added/deleted**.

Q: One **member** is in the **Directory** twice, how do I remove the one of their accounts?

A: If the **member's number** was recently updated, then you will have two accounts on the site at once. In order to consolidate, run a **Roster Sync.** Next, access the **Additions/Deletions Queue.** You should see the member in both the **Additions/Deletions Queue** at the same time (**Deletions Queue** will have the old member number, while the **Additions Queue** will have the new member number). Click on both names and then click **Match.** This will merge the two accounts, while deleting the old account and keeping the new account.

Best Practices

1. Never make any manual changes to the member's profile in the website directory without making sure it is also updated in the accounting system. If a member is allowed to edit portions of their profile and the change isn't reflected in the member roster in your accounting system, those changes will no longer be in the Club directory. Since **Roster Sync** makes the information in your accounting system the information that shows up in the Club directory, you need to make sure that any important information is placed on the member roster in the accounting system. However, members and admins are free to alter the username and password field.
2. **NEVER MANUALLY ADD A MEMBER TO THE WEBSITE DIRECTORY.** Doing so will cause double members to show up and throw off the **Roster Sync** process. Please always use the **Roster Sync** tool to give new members website access.