

Reusing Member Numbers

2020 - Spring Edition

Overview

While reusing Members numbers is **not** a Clubessential recommended Best Practice, we understand sometimes it's necessary for a Club to do this. Several steps must be taken in order to reassign a Member number in the Office system and changes must also be made on the Website; if your Club is unified. The following guide details these processes.

Use Case:

- In the case that a Member has a preference for a specific Member number or a Member leaves the club and the club prefers to keep Member numbers numerically low, Member numbers can be reused.

Office

The Office system will not allow an existing Member number to be reassigned. The following steps explain how that process can be done within the Office system.

- The first step is to change the 'old/resigned' Member number by placing an 'x' or an "R" (for Resigned) in **front** of the Member number **once you Resign the Member in Office**. This will free up the Member number to be used again.
- For Web purposes, it is best if the Club has a 'Resigned' Member Type and changes both the **Member Type** and the **Member Status** in the Office record.

Member Number	Last Name	First Name	Member Type	Member Status
x502	Montano	Jen	Resigned	Resigned
x502A	Montano	Ruben	Resigned	Resigned

Once this change has been made to the Resigned Member, assign a new Member this same “502” or “502A” number in Office.

Please Note: Many times the Member number is set as the default username for the Member’s Website account. When Member numbers are changed in Office; those changes do **NOT** push over to update the Website. This can present a problem if the Resigned Member is still on the Website (even if they are inactive) and then the new Member pushes to the Website. The result is two different Members (one inactive and one active) with the SAME username. This will block the new Member from being able to log in.

Website:

Please see the following solutions to correcting a Member number sync from the Website.

1. Manually find the resigned Member in the ‘inactive’ admin portion of the Website directory and manually change the username to include the “x” or the “R” at the start of the Member number. **This will free up that username.**

Web Account Information

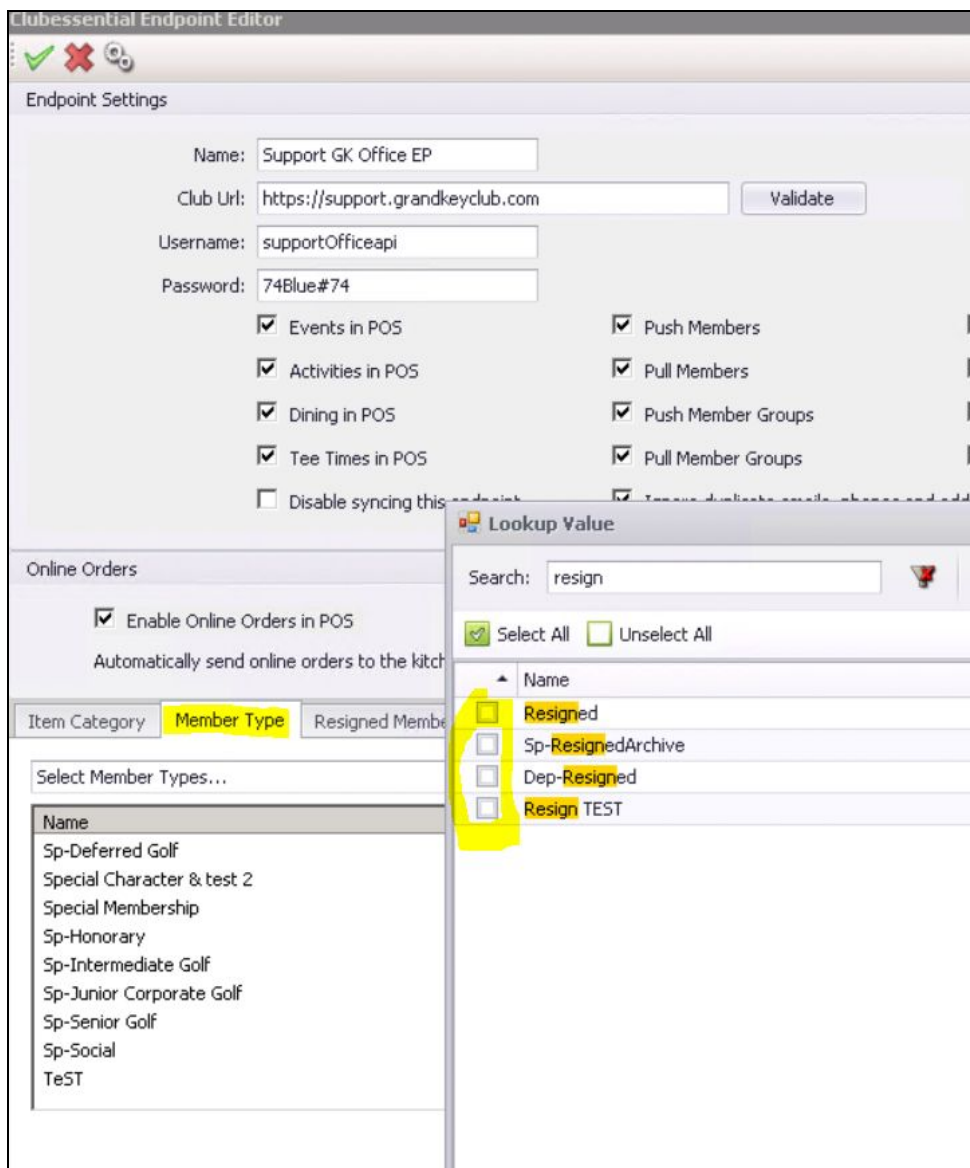
Username *

Password *

Confirm Password *

2. If the Club does use a ‘Resigned’ Member type; there is another method to clear those Resigned Members completely out of the Website instead of manually updating individual usernames, detailed below.

For this process, in the Office unification settings under the Member Type tab; we want to make sure the “Resigned”, “Sp-Resigned” and/or “Dep-Resigned” Member types are **NOT flagged to sync to the Website**. By NOT flagging these types; when a Member is changed to a Resigned Type, the system will push the names of the Resigned Members to an area of the Website called the **Delete Queue**. Resigned Members can then be fully purged from the Website and this also frees up the username.



On the Website, from the Admin menu on the top left, access the Delete Queue by selecting Admin → Integrations → Roster Sync.


ADMIN Client Resource Center

CONTENT MGMT	COMMUNICATION	USER / PROFILES	EVENTS	REPORTING	CONFIGURATION
Articles	Beacon Manager	Directory / Roster	Event Manager	Active User Listing	Editor Sandbox
Document Upload	Compose Email	Dynamic Groups	Today	CE Stats	Public Home
Form Base	CRM	Groups	Week Month Year	Global Services	Site Configuration
Image Explorer	First Impression	Profile	All	Menu Details	Site Notifications
Template Manager	Inbox	Roster Search	Event Reports	Profile Update	INTEGRATIONS
	Mail Reporting	Staff		Session Details	Event Billing
	Polling	Yellow Book		Site Statistics	RosterSync
	Push Notifications			Summary	RESERVATIONS
	Surveys			User Logins	Event Manager
	Voice Messenger				Role Security

Here you will see the **Delete Queue**. Names of Resigned Members should populate here. Highlight the names and click **Delete Selected**. This will delete the Resigned Members from the Website.

ROSTER SYNC INTERFACE

Last Sync Performed 4/18/2017 at 3:12 PM

Delete Queue 

x502(0) - Jen Montano

KEEP SELECTED
DELETE SELECTED
<< MATCH >>

Please Note: CE can set up a special function to auto clear this delete queue at the Club's request, but by default, it must be cleared manually. Please reach out to your Clubessential team to have this function set up.