Membership History

Including renewing, unlocking, and how to edit/delete a membership history.

- Locking and Unlocking
- Membership History Table
- Renewing Memberships

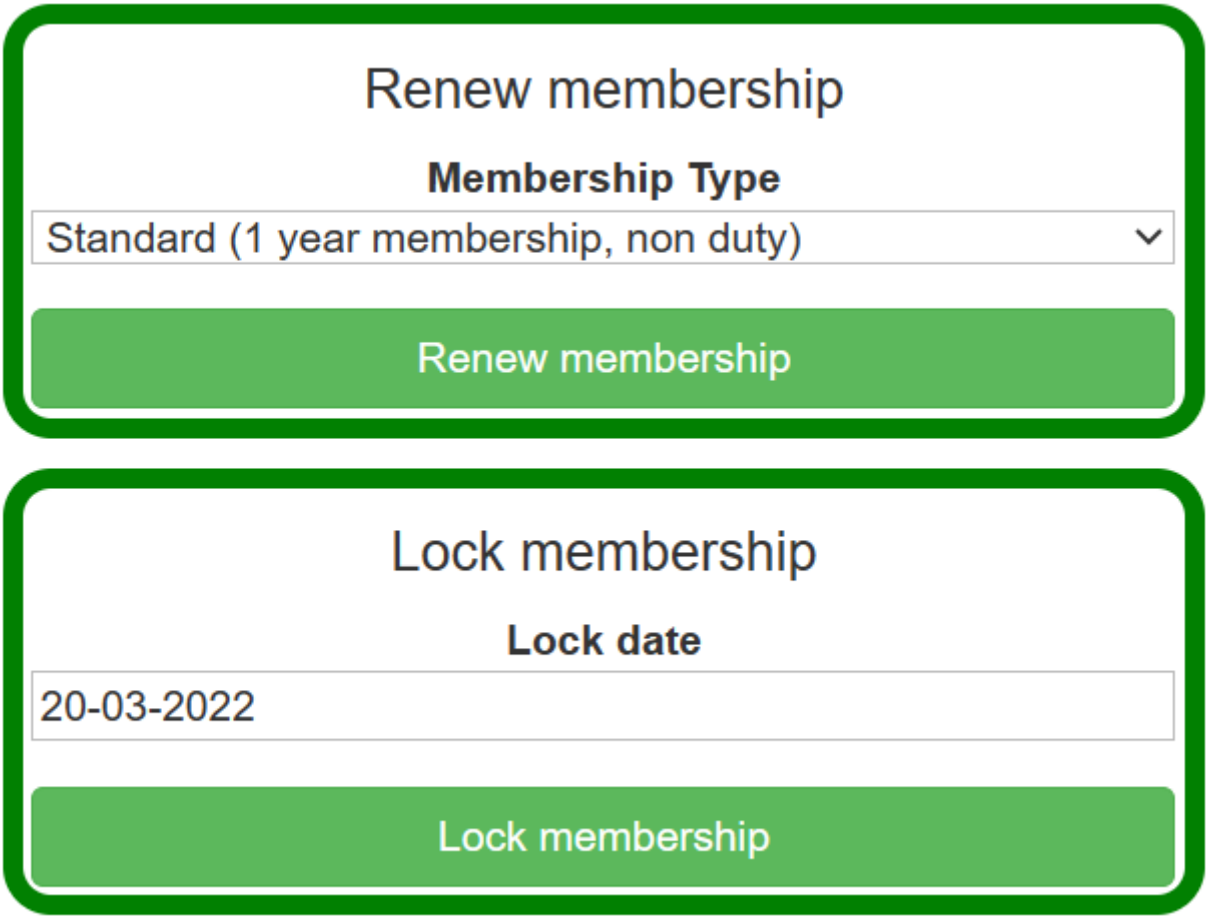
Locking and Unlocking

Locking

Locking a member removes them from your current members list, and also prevents them from being able to login or borrow.

To lock a member, navigate to their Membership History tab.

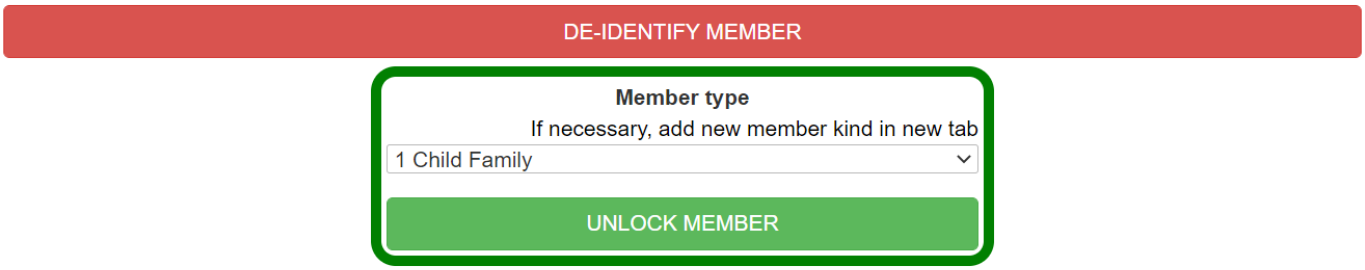
At the bottom there is a option to "Lock Membership" with a date field. This is automatically pre-filled with the member's expiry date, even if this is some time in the future.



Clicking this button will remove the members login details, remove them from your current members list, and from your member suggestions (the search bar at the top), and lock their account. Even though the date is in the future, the changes will happen immediately, so it is up to you whether or not you wish to change the date to reflect todays date.

Once a member is locked you will have a red "DE-IDENTIFY MEMBER" banner appear across the top, for scenarios where identifying details of a member need to be removed. Clicking this banner

will wipe all identifying details of the member - this is not reversible.



Unlocking

Unlocking presumes you are re-adding a former member who has returned, not resuming a current membership that was paused for whatever reason. To resume a current membership, please visit the Membership History page.

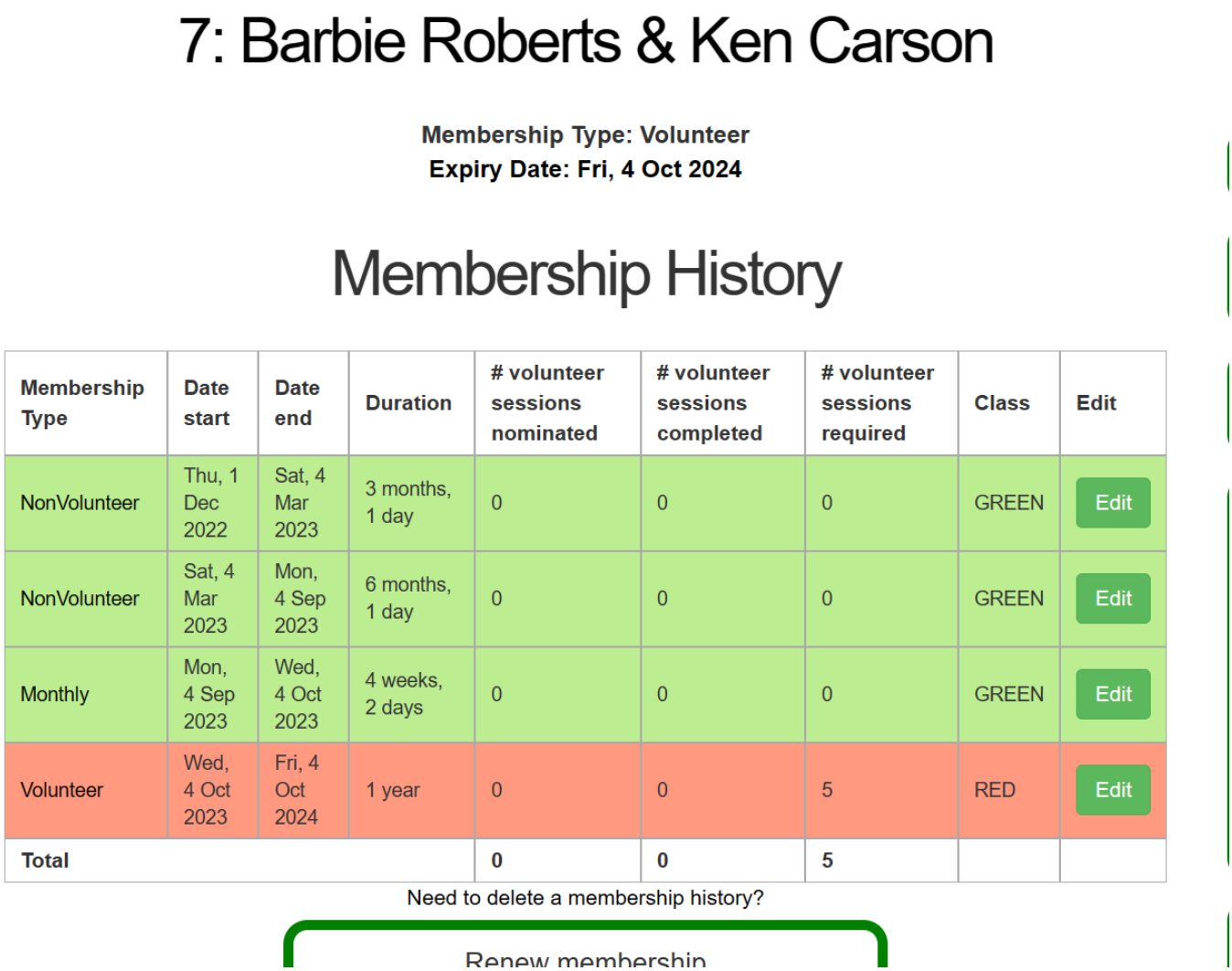
When you view a locked member there will be an "unlock member" option at the top of the page with a drop down menu for membership kinds. Select the relevant membership kind and press the Unlock Member button.

This will start the new membership from today's date, issue the relevant charge, and resend the welcome email (if welcome emails on sign up are enabled). If you want to back-date the membership to start earlier, more can be found on this under the Membership History page.

Membership History Table

Membership History Table

This table displays all the membership histories for the member, including volunteering requirements and if they were met.

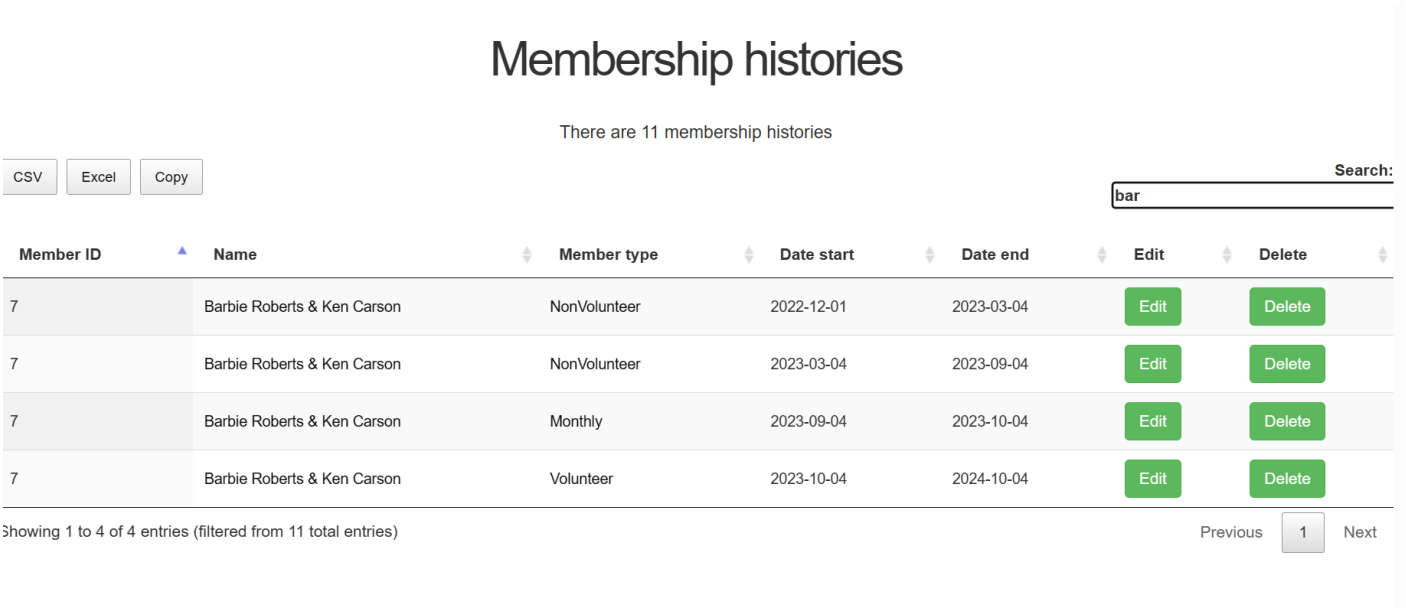


If you need to edit a member history, such as if a member signs up for the wrong type of membership and wishes to change it, you can do so via the "edit" button at the right of the table. This will allow you to change the membership kind, and the start and end date. It will not change the charge however, you will need to do this through the Transaction History tab. If you want to edit the volunteer requirements, this is through the Volunteer History tab.

Deleting membership histories

If you wish to delete a membership history entirely (such as if you've accidentally hit the button twice, or its easier to wipe the wrong membership and re-enter entirely), click on the **"Need to delete a membership history?"** text below the table. This will take you to a table of all membership histories, so you will need to remember the member's name and/or member number.

Search for the member (by name or ID) and it will display all membership histories for that member, with the option to edit or delete. Deleting here is irreversible, so be very careful.



Note: sometimes a member can be created with no membership histories due to invalid values in their sign up details. If this occurs, you will not be able to renew or lock the member - please contact admin@setls.com.au for help resolving this issue.

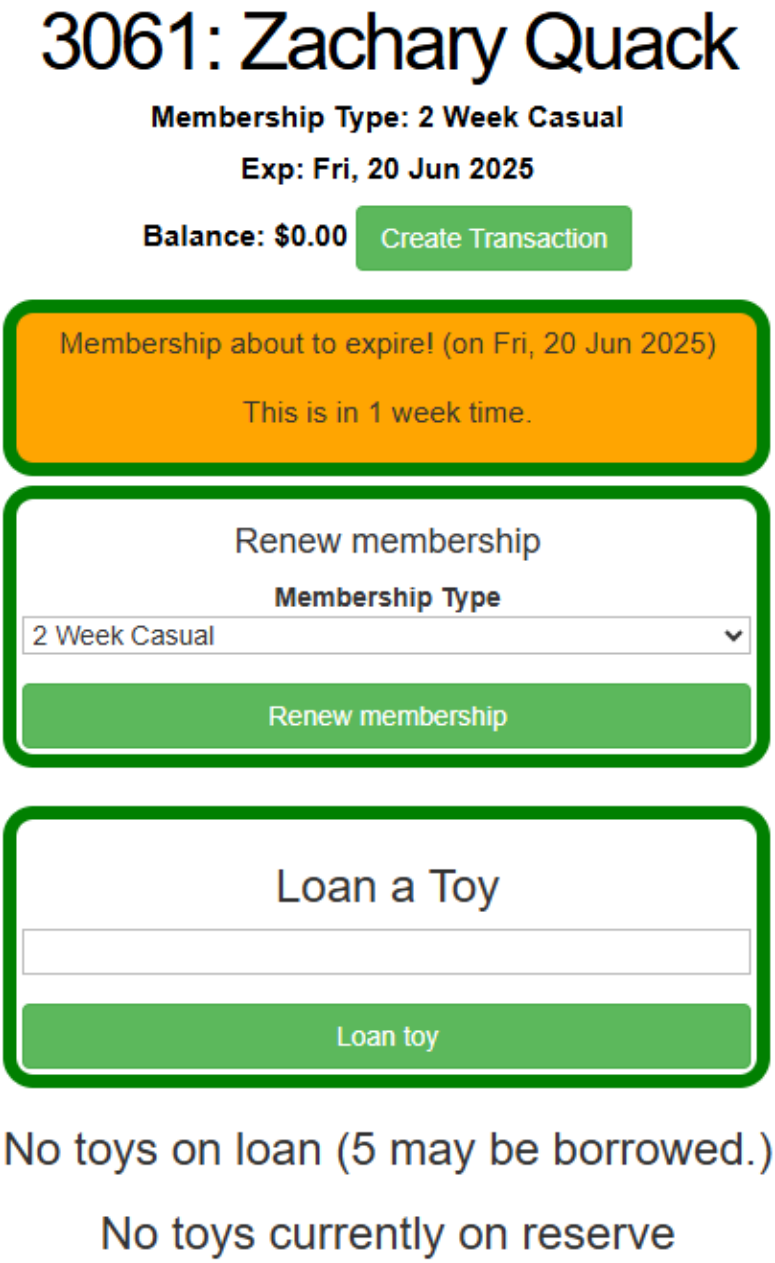
Renewing Memberships

This page generously contributed by the Townsville Toy Library committee.

Membership Renewal

Once a membership is within 4 weeks of expiry an alert will be shown at the top of the borrow/return screen (the alert will be orange if it hasn’t expired but will in less than 4 weeks, it will be red if the membership has expired). This alert is also shown to the member at their login level, but will not have the renew membership form.

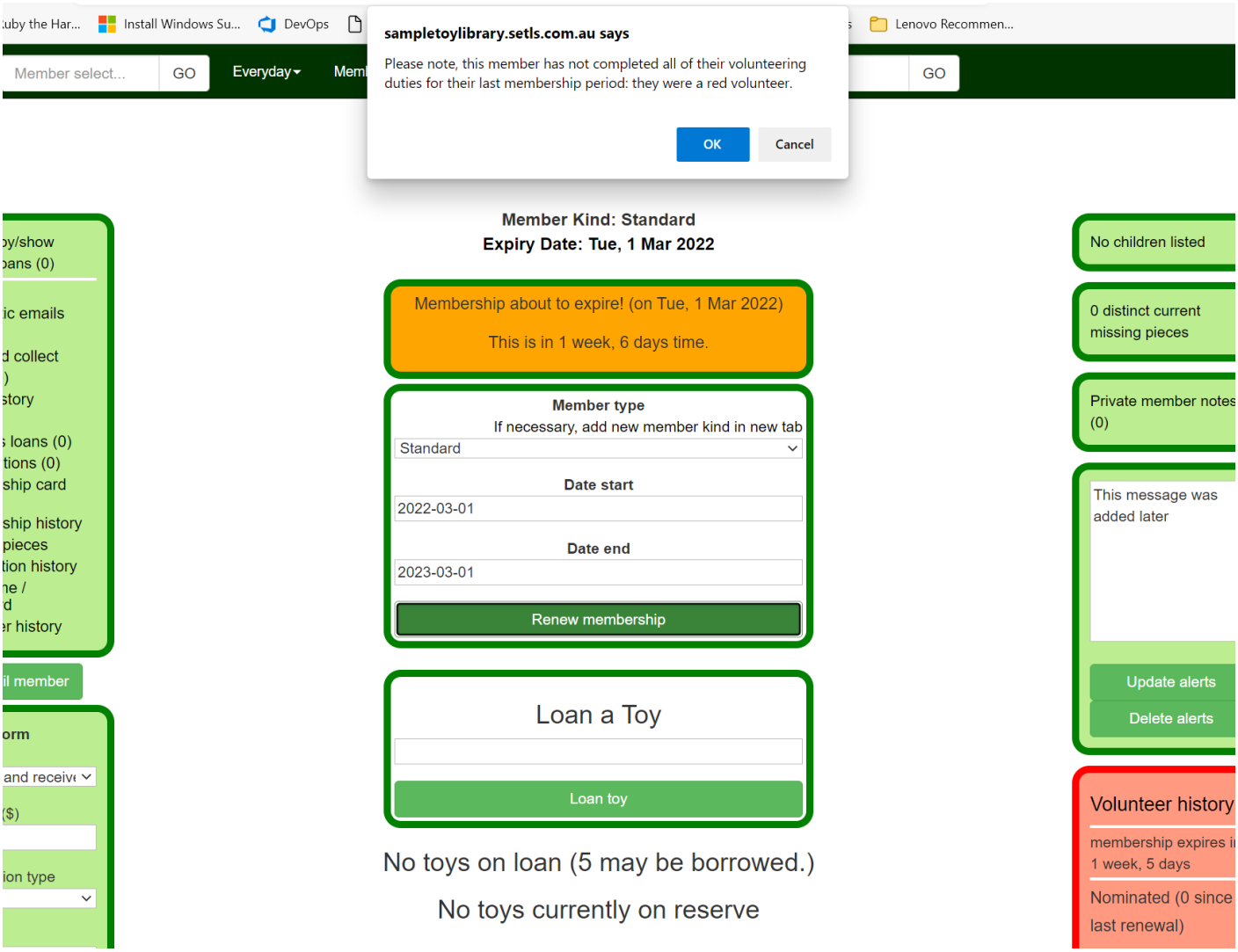
If a member wishes to renew before the 4 weeks, it can be done through their Membership history link - the renew membership form is always available there.



To renew a member's membership

1. In Member Type, choose the correct membership level.

2. Click Renew Membership. If the member has not completed the required volunteer commitments for their Member type, you will be asked to confirm. Note: if you experience any lag or issues on this form, do not refresh or repeatedly click the button - each click sends through the command to create a new membership history, and you may accidentally give your member 5 copies of the same membership! Report any issues to admin@setls.com.au



4. A new membership history will be created with the new date start and date end, the members account will be updated, and the fee from the member kind will be charged to the account.