

# 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.

### Renew membership

**Membership Type**

Standard (1 year membership, non duty) ▼

Renew membership

### Lock membership

**Lock date**

20-03-2022

Lock membership

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 today's 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.

DE-IDENTIFY MEMBER

Member type

If necessary, add new member kind in new tab

1 Child Family

UNLOCK MEMBER

## 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.

### 7: Barbie Roberts & Ken Carson

Membership Type: Volunteer  
Expiry Date: Fri, 4 Oct 2024

#### Membership History

Membership Type	Date start	Date end	Duration	# volunteer sessions nominated	# volunteer sessions completed	# volunteer sessions required	Class	Edit
NonVolunteer	Thu, 1 Dec 2022	Sat, 4 Mar 2023	3 months, 1 day	0	0	0	GREEN	Edit
NonVolunteer	Sat, 4 Mar 2023	Mon, 4 Sep 2023	6 months, 1 day	0	0	0	GREEN	Edit
Monthly	Mon, 4 Sep 2023	Wed, 4 Oct 2023	4 weeks, 2 days	0	0	0	GREEN	Edit
Volunteer	Wed, 4 Oct 2023	Fri, 4 Oct 2024	1 year	0	0	5	RED	Edit
Total				0	0	5		

Need to delete a membership history?



Renew membership

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.

## Membership histories

There are 11 membership histories

CSVExcelCopy

Search:  
bar

Member ID	Name	Member type	Date start	Date end	Edit	Delete
7	Barbie Roberts & Ken Carson	NonVolunteer	2022-12-01	2023-03-04	Edit	Delete
7	Barbie Roberts & Ken Carson	NonVolunteer	2023-03-04	2023-09-04	Edit	Delete
7	Barbie Roberts & Ken Carson	Monthly	2023-09-04	2023-10-04	Edit	Delete
7	Barbie Roberts & Ken Carson	Volunteer	2023-10-04	2024-10-04	Edit	Delete

Showing 1 to 4 of 4 entries (filtered from 11 total entries)

Previous1Next

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](mailto: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.

### 2769: Zachary Quack

Loan a toy/show current loans (0)

Bond

Automatic emails

Children

Click and collect

Holds (0)

Login history

Profile

Previous loans (0)

Reservations (0)

Membership card (PDF)

Membership history

Missing pieces

Transaction history

Username / password

Volunteer history

Member Kind: Standard

Expiry Date: Tue, 1 Mar 2022

Membership about to expire! (on Tue, 1 Mar 2022)

This is in 1 week, 6 days time.

Member type

If necessary, add new member kind in new tab

Standard

Date start

2022-03-01

Date end

2023-03-01

Renew membership

No children listed

0 distinct current missing pieces

Private member notes (0)

This message was added later

## To renew a member's membership

1. In Member Type, choose the correct membership level.
2. The start and end date are pre-populated according to the Member's current Member type (also known as **Member kind**). If the member is changing types, you may need to correct the end date ie if this member decides to change to a 6 month membership, the end date would need to be corrected to 2022-09-01.

3. Click Renew Membership. If the member has not completed the required volunteer commitments for their Member kind, 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](mailto:admin@setls.com.au)

The screenshot shows a web application interface for a toy library. A modal dialog box is open, titled "sampletoylibrary.setls.com.au says", with the message: "Please note, this member has not completed all of their volunteering duties for their last membership period: they were a red volunteer." The dialog has "OK" and "Cancel" buttons.

Below the dialog, the main content area displays the following information:

- Member Kind:** Standard
- Expiry Date:** Tue, 1 Mar 2022
- Membership about to expire!** (on Tue, 1 Mar 2022)  
This is in 1 week, 6 days time.
- Member type**  
If necessary, add new member kind in new tab  
Standard (dropdown menu)
- Date start:** 2022-03-01
- Date end:** 2023-03-01
- Renew membership** (button)
- Loan a Toy** (section header)  
[Empty input field]  
**Loan toy** (button)
- No toys on loan (5 may be borrowed.)**
- No toys currently on reserve**

On the right side of the interface, there are several informational boxes:

- No children listed
- 0 distinct current missing pieces
- Private member notes (0)
- This message was added later
- Update alerts
- Delete alerts
- Volunteer history**  
membership expires in 1 week, 5 days  
Nominated (0 since last renewal)

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.