

GUIDE TO THE VTTA ONLINE MEMBERSHIP SYSTEM

FOR MEMBERSHIP SECRETARIES

JON FAIRCLOUGH

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7TH MARCH 2024

AGENDA

- Admin Panel
- Dashboard
- Membership Categories
- Group and National Official membership functions:
 - Add Member
 - Edit Member Details
 - Renew Member
 - Member resigns or dies
 - Convert IM to JM and JM to IM
 - Convert IM/LM to IMV/HLM/DLM
 - Convert JM/JMLM to IMV/HLM/DLM
- Additional National Official membership functions:
 - Change Group
 - Merging Members
 - Deleting Members

VTTA ONLINE MEMBERSHIP SYSTEM FOR MEMBERSHIP SECRETARIES

 Group officials should read the whole of this guide so they understand what both group and national officials can do, so you can ask them to do it!



Veterans Time Trials Association

Home News Groups - Events/Results - Standards - Competitions - Records - About -

The Veterans Time Trials Association is for anyone 40 years of age and over who has an interest in cycle racing, and specifically in time trialling.

If you are over 40 and interested in time trialling the VTTA is the organisation for you. We have 3000 members in our 16 regional groups. We promote 100 time trial events a year, 8 national championships, 3 season-long competitions, plus various competitions and trophies at regional level. We also organise individual challenges (called Standard medals) and national age records, and we produce four glossy magazines each year. It costs as little as £14 a year to join.

To join or renew click the 'Join or Renew' button. If you have logged in as an existing member and website user then click on your name and follow the My Profile link.

Please note that membership for the 2020 season is open from 1st October 2019 and your membership will then continue to 31st December 2020.

Quick Links	
Forms	
Find my Standard	
CTT site	
Time Trialling Forum	

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Click on your name to show the drop down with your options

- Admin Panel
- My Profile
- Payment
- History
- Logout
- Select Admin
 Panel

VTTA ONLINE MEMBERSHIP SYSTEM FOR MEMBERSHIP SECRETARIES

DADMIN PANEL - DASHBOARD

VTTA admin	=					Jon Fairclough
🏶 Dashboard	Feeds					✿ Dashboard > Feeds
MEMBERSHIP	The feed has been saved					
😤 VTTA Members						
♥ Donations	Filter	Feeds				Add Feed
🐂 Payment Logs	Free Search	Title	Created By	Created	Modified	Actions
RECORDS		New style Dashboard	Jon Fairclough	02/02/2020, 18:28	02/02/2020, 18:28	Edit Delete
🖻 Records 🛛 <		Guide to the VTTA Bonline membership system for Group Officials - Version 8	Jon Fairclough	07/02/2020, 11:02	07/02/2020, 11:02	Edit Delete
CONTENT						
🏶 Content 🛛 🔍		<pre><previous next=""></previous></pre>				
🏶 News 🗸		Page 1 of 1, showing 2 record(s) out of 2 total				
🌣 Forms 🛛 <						
Documents <						
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VTTA admin	=					Jon Fairclough
A Dashboard	View Feed				# 1	Dashboard > Feeds > View Feed
MEMBERSHIP						
📽 VTTA Members	Guide to the VTTA 🛛 online	e membership system for Group Officials - Version 8				
♥ Donations	Created By Jon Fairclough					
🏲 Payment Logs	Created 07/02/2020, 11:02					
RECORDS	Modified 07/02/2020, 11:02					
🖉 Records 🛛 🔍	Description This has been reissued with	additional guidance on converting members to HLMs, DLMs and IMVs, Merging Members and Deleting members. All off	icials who manage membe	rs should consult it before ma	king changes to the member dat	abase
CONTENT	Groups this feed is visible to					
Content <	East Anglian					

Use the Dashboard to review the news feed items for officials

Click on each title for more info and use the back button to go back to the dashboard

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MEMBERSHIP CATEGORIES

The table shows the membership categories that exist in the system and how they can be allocated

Membership Category	Acronym	Join?	Add Member?	Comment
Individual Membership	IM	Yes	Yes	Standard
Individual Membership (no Veteran)	IMV	No	Yes	If co-resident with HLM/DLMs
Joint Membership	JW	Yes	Yes	If co-resident
Honorary Life Membership	HLM	No	Yes	Group approves
Distinguished Life Membership	DLM	No	Yes	NEC approves
Life Membership	LM	No	No	Legacy
Joint Life Membership	JMLM	No	No	Legacy

MEMBERSHIP FEES

Membership fees are decided by groups who ask a national admin to set it in the membership system.

Membership Category	Fee	Comment
Individual Membership	Set by Group	Includes fee paid to National
Individual Membership (no Veteran)	Set by Group*	Includes fee paid to National
Joint Membership	Set by Group	Includes fee paid to National
Honorary Life Membership	Free	Get the Veteran for free and National makes no charge
Distinguished Life Membership	Free	Get the Veteran for free and National makes no charge
Life Membership	Free	Must buy a subscription to the Veteran if they want it
Joint Life Membership	Free	Must buy a subscription to the Veteran if they want it

* A group may set the IMV fee to a nominal amount (e.g. $\pounds1$) to subsidise it's IMVs

GROUP & NATIONAL OFFICIAL MEMBERSHIP FUNCTIONS

7

ADD MEMBER EDIT MEMBER DETAILS RENEW MEMBER MEMBER RESIGNS OR DIES CONVERT IM TO JM AND JM TO IM CONVERT IM/LM TO IMV/HLM/DLM CONVERT JM/JMLM TO IMV/HLM/DLM

VTTA admin	=						Jon Faircloug
🎓 Dashboard	VTTA Members					倄 Dashboard	> VTTA Member
	Report Criteria	€ Members List			Add new VTT/	A member 🗤 🛛 Ex	port members
曫 VTTA Members	Free Search	Show 100 × entries					
♥ Donations				Previous	2 3 4	+ 5	20 Next
📕 Payment Logs		First Last name Ji ID Ji Group Ji DOB Ji	Gender 👫 Category	Ţ	t Expires 👫	Status 🕼	Actions 👫
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Groups <		A	Male Individual Men	nbership	31/12/2018	🛇 Paid Up	Manage
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Competitions <		1	Male Individual Men	nbership	31/12/2018	🛛 Paid Up	Manage
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Approve results		4	Male Individual Men	nbership	31/12/2018	🛇 Paid Up	Manage
os://www.vtta.org.uk/admin/me	mbers	1	Male HLM - Individu	al Membership		🛛 Paid Up	Manage

Select VTTA members

If you have received n application form, click on Add New VTTA Member to enter the details

VTTA admin	■	Jon Fairclough	Fill in the
🖀 Dashboard	Add Members	🏘 Dashboard > Members > Add Member	· · · · ·
	Momber dataile		tields usi
曫 VTTA Members	THE	Help: Add Member	the data
♥ Donations	Mr V		from the
🏲 Payment Logs	First Name		
			form and
🏶 Content 🛛 <	- Middle Name		click sub
🏶 News <			
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🗭 Events 💦 <	Сшь		new
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🛤 Approve results	☐ Standards: One attempt at one distance		
	Standards: Unlimited attempts at one distance		
	Standards: Unlimited attempts at any distance	× .	

VTTA admin			Jon Fairclough If payment
🎓 Dashboard	Member: TestFirstName TestLastNam	1e & Dashboard > Members > 7	estFirstName TestLastName > Invoices
MEMBERSHIP	The member has been saved. Please click "payment received	" for any items which the member has made navment	
曫 VTTA Members			donation click
Donations		O Details ☐ Payments O Account	Add Donation
🏲 Payment Logs		Member Payments	
CONTENT		Outstanding Invoices	Invoice
🌣 Content 🔷	TestFirstName TestLastName		 If payment
🌣 News 🗸	Joined date	Paid Invoices	- includes
Forms <	End date		
🗘 Documents <	Status OPending	Pending Manual Payment Invoices	_ standards, click
USERS & GROUPS	Last Paid Date	# Member Invoice Description Due On Amount	Add
O Groups	<	3320 TestFirstName Individual Membership membership from: 01/05/2018 - £16.00	⁽¹²⁾ payment received Membership
Website Users	Mombor dotails		
Officials			LANG
EVENTS	test@email.com	Add invoices	
🗭 Events 🗸	Date of Birth 01/01/1978	Add membership invoice	
♥ Competitions <	< T	Add donation invoice	
		Add membership extra invoice	
l≊ Approve results			

VTTA admin	=						Jon Fairclough
# Dashboard	Member: TestFirstName TestLastName					♣ Dashboard > Members > TestFirstNa	ame TestLastName > Invoices
MEMBERSHIP	The donation has been saved.						×
🚰 VTTA Members							
Donations		& Details	Payments O Account				
🐂 Payment Logs		Member Pa	ayments				
CONTENT		Outstandi	ng Invoices				
🗘 Content <	TestFirstName TestLastName	#	Member	Invoice Description	Due On	Amount	
🕸 News 🗸	Joined date	3321	TestFirstName TestLastName	Standards: Unlimited attempts at any distance		£10.00	payment received
🌣 Forms 🗸	End date	3322	TestFirstName TestLastName	Donation		£10.00	payment received
Documents <	Status						
USERS & GROUPS	Last Paid Date	Paid Invoid	bes				
Groups <							
Website Users <	Member details	Pending M	anual Payment Invoices				-
Officials <		#	Member	Invoice Description	Due On	Amount	
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🏴 Events 🔍 <	⁽¹⁾ Date of Birth 01/01/1978						
🝷 Competitions 🛛 <		Add invoic	ces				_
🛤 Approve results		Add mem	ibership invoice				
		Add dona	ation invoice				
Aembership Categories		Add merr	nbership extra invoice				
A Standarda The Vetame							

If you have received a cheque payment for sub, donation and standards, then click the payment received buttons

A Dashboard MemBersship VTTA Members Donations Payment Logs Content Conten	ember: TestFirstName TestLastName	Bashboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Account Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Deshiboard > Members > TestFirstName TestLastName > Members > Add Member Account Cenerate User Account
MEMBERSHIP VTTA Members Donations Payment Logs CONTENT Content Content Content Content	TestFirstName TestLastName	Details Payments O Account This member's account is not associated with a user account. This means the member cannot login to administer their account. You should either assign them to an existing user account or generate a new one (user will be notified) <u>Assign Account</u> <u>Cenerate User Account</u>
∀ VTTA Members ✓ Donations F Payment Logs CONTENT ✓ Content ✓ Content ✓ Content	TestFirstName TestLastName	A This member's account is not associated with a user account. This means the member cannot login to administer their account. You should either assign them to an existing user account or generate a new one (user will be notified) Assign Account Generate User Account
Donations Payment Logs CONTENT Content Content	TestFirstName TestLastName	Inis member's account is not associated with a user account. This means the member cannot login to administer their account. You should either assign them to an existing user account or generate a new one (user will be notified) Assign Account Generate User Account
Payment Logs CONTENT	TestFirstName TestLastName vTTA ID: 12630	Assign Account Generate User Account
CONTENT CONTENT Content <	VTTA ID: 12630	Generate User Account
🗘 Content < —		
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USERS & GROUPS		
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	ember details	
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Officials < 01/℃	/01/1978	
EVENTS		
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TO ACTION		
B⊗ Approve results		
SETLID		

Click on the Account Tab and Generate a Website User Account for the new member if they have provided an email address

VTTA admin	=					website user
A Dashboard	Member: TestFirstl	Name TestLastName			🗰 Dashboard > Members > TestFirstName TestLastName > Members > Add Memb	account name
MEMBERSHIP			⊘ Details			has been
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O News	End date	31/12/2018				that they can
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USERS & GROUPS	Last Paid Date	01/05/2018 22:12				go to the site
Groups	<					and access
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Events	<					password 📿
♥ Competitions	<					feature to set
						their own
Approve results						
						password –
						send them the
ρ						member guide
VTTA ONLINE M	EMBERSHIP SYSTEM	FOR MEMBERSHIP	SECRETARIES			13

The member

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>ADMIN PANEL - VTTA MEMBERS - EDIT MEMBER DETAILS -1



If you are over 40 and interested in time trialling the VTTA is the organisation for you. We have 3000 members in our 16 regional groups. We promote 100 time trial events a year, 8 national championships, 3 season-long competitions, plus various competitions and trophies at regional level. We also organise individual challenges (called Standard medals) and national age records, and we produce four glossy magazines each year. It costs as little as £14 a year to join.

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Quick Links	
Forms	
Find my Standard	
CTT site	
Time Trialling Forum	

>ADMIN PANEL - VTTA MEMBERS - EDIT MEMBER DETAILS -2

VTTA admin	≡	
🕷 Dashboard	Admin dashboard	
MEMBERSHIP	Feeds Jon Fairclough	Select VIIA
📽 VTTA Members		members in the igcup
Donations Reyment Logs	New style Dashboard The new style dashboard allows admins to add/edit/delete information and news items to the dashboard. We will use the feature to notify of you new and changed features of the VTTA website. The items are called "Feeds" and the admin panel has a "Feeds" item that allows	Admin Panel
RECORDS	admins to add a feed.	
CONTENT		
🌣 Content 🗸		
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Documents		The second second second second
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USERS & GROUPS		
Groups <		and the second states of the
Website Users		
		0

> ADMIN PANEL - VTTA MEMBERS - EDIT MEMBER DETAILS -3

VTTA admin						Jon Fairclough
🏶 Dashboard	VTTA Members				倄 Dashboard	> VTTA Members
	Report Criteria	C Members List		Add new VTTA m	ember 🖌 🛛 Exr	port members
YTTA Members	Free Search	Show too scientias				
Donations		Show 100 V Chines	Previous	2 3 4	5	29 Next
R Payment Logs		Last First L name 내 name 내 ID 내 Group 내 DOB 내 Gender 네	Category 🔰	Expires 🔱	Status 🔰	Actions \downarrow
ONTENT	Membership Status Nothing selected	٥	Individual Membership	31/12/2018	🛇 Paid Up	Manage
 Content News 	Group		Individual Membership	31/12/2018	🛇 Paid Up	Manage
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Groups	< 0	Keducieu	Individual Membership	31/12/2018	오 Paid Up	Manage
Website Users Officials	<		Individual Membership	31/12/2018	오 Paid Up	Manage
VENTS		٥	Individual Membership	31/12/2018	오 Paid Up	Manage
Events	<		Individual Membership	31/12/2018	♥ Paid Up	Manage
Competitions	<		Joint Membership	31/12/2018	🛇 Paid Up	Manage

Enter the lastname of the person you want to change the details of in the Free Search box.

You need to wait for the system to finish loading the membership list before it will process your search

> ADMIN PANEL - VTTA MEMBERS - EDIT MEMBER DETAILS -4



> ADMIN PANEL - VTTA MEMBERS - EDIT MEMBER DETAILS -5

VTTA admin	Ξ		Jon Fair
🖀 Dashboard]	🏶 Dashboard > Members > Jon Furch mber Detai
		A Details Payments Accou	unt
🚰 VTTA Members		Member Details	Edit Member Details Delete member
♥ Donations		Title	
🐂 Payment Logs		First name	
		Middle name	
🗘 Content <		Last name	
🌣 News 🗸		Member Email Address	
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🗘 Documents <	кеаастеа	Club	
		Date of birth	
🖲 Groups 💦 <		Gender	
Website Users <		VTTA Number	
Officials <		Membership Category	Individual Membership
EVENTS		Membership Status	Paid Up Set As Deceased Set As Resigned
■ Events		Expiry Date	31/12/2018
		Last Paid Date	23/12/2017 0:00
		Last Payment Method	

VTTA ONLINE MEMBERSHIP SYSTEM FOR MEMBERSHIP SECRETARIES

Select Edit

Member Details

DADMIN PANEL - VTTA MEMBERS - EDIT MEMBER DETAILS -6

VTTA admin		Jon Fairclough
🖀 Dashboard	Edit Members	♣ Dashboard > Members > Edit Member
MEMBERSHIP	Title	Heley Edit Member
😤 VTTA Members	Mr ~	Help. Eurt Member
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Officials	Redacted	
	Club	
Events	Redacted	
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	Redacted	~

Change the details attribute to a new value, scroll down and select submit.

If you want to cancel a change, select the back button on the browser to back out.

VTTA admin	E		Jon Fairclough	
🖶 Dashboard	Member: TestFirstName8 TestLast	Name8	# Dashboard Members TestFirstName8 TestLastName8 Invoices	
		Betails Beayments OAccount		
🖀 VTTA Members		Member Payments		
Donations		Outstanding Impires		
🗮 Payment Logs	TestFirstName8 TestLastName8	outstanding involces		
	VTTA ID: 13859	# Member Invoice Description Due On	Amount	
Content	Joined date 23/10/2018	4264 TestFirstName8 Individual Membership membership from: 14/11/2018 - TestLastName8 31/12/2019 31/12/2019	£15.00 [32 payment received Delete	
• News	End date 31/12/2019			
Forms	Status Ø Paid Up	Paid Invoices	÷.	
Documents	Last Paid Date 23/10/2018 10:34			
		Pending Manual Payment Invoices		
Groups	Member details			
Website Users	☑ Email jon.fairclough@live.com	Add invoices		
Officials	Date of Birth	Add membership invoice		
🕈 Competitions	01/04/1203			
		Add donation invoice		
😂 Membership Categories		Add membership extra invoice	201	

u receive a cheque or renewal payment, do this:

- ogin
- dmin panel
- TTA members
- elect member
- ayment tab
- elect Add membership voice
- elect Build membership voice (similar for andards, donations, nches)
- elect Payment received

done! The payment should ear in the payment log.

MEMBER RESIGNS OR DIES

- Go to VTTA members, find the member and click on "Manage"
- Click on "Set as Resigned" or "Set as Deceased" as appropriate
- For members that have died:
 - Go to the Account tab
 - Reassign the account to "Unlinked Account"
 - Go to member Details and Select "Edit Member details"
 - Delete the email address (this prevents relatives accidentally receiving emails)
 - Click "Submit"

CONVERT IM TO JM AND JM TO IM

WHEN A MEMBER CONVERTS FROM IM TO A PRIMARY JM (note the secondary JM may be an existing IM or a new secondary member)

- go to the IM profile and set as resigned, unlink the website account and delete the email address from the IM profile, so it can be reused
- add a note recording the change in the IM record
- add the former individual member as primary joint member
- add the new secondary member if a new member
- If the secondary member is an existing individual member then set to resigned and then add as a secondary member to the primary member
- build the membership invoices for both members and mark them paid if the former IM was paid up
- depending on when the change happens in the membership year, the group official may charge the difference between the IM and JM fees to the new secondary member
- if the new secondary member was a paid up individual member, then no additional fee should be paid
- Advise members to relink their CTT accounts if they want to race VTTA ONLINE MEMBERSHIP SYSTEM FOR MEMBERSHIP SECRETARIES

WHEN A MEMBER CONVERTS FROM JM TO IM

- go to the JM profiles and set both as resigned;, unlink the website account and delete the email address from the JMprofile, so it can be reused
- add a note recording the change in the JM record
- add the member as an IM
- if a JM is ended by one member becoming an IM and the other resigning or passing away, then no correction fee is needed
- if a joint membership is ended with both members becoming IMs, then depending on when the change happens in the membership year, the group official may charge the person who was the secondary member the difference between the IM and JM fees
- Advise members to relink their CTT accounts if they want to race

If in doubt – ask an admin to do it!

CONVERT IM/LM TO HLM/DLM

CRITERIA FOR CONVERSION

- Criteria for HLM/DLM are defined in the VTTA regulations (note it is no longer automatic on reaching age 80)
- For HLM, the Group Committee must approve
- For DLM, the NEC must approve a written recommendation by the member's group

VTTA ONLINE MEMBERSHIP SYSTEM FOR MEMBERSHIP SECRETARIES

PROCESS FOR CONVERSION

- Find the member in the VTTA member list and click on "Manage"
- Click on "Edit Member Details"
- Click on the Membership Category dropdown and select the new value HLM/DLM
- Click on "Submit"

If in doubt – ask an admin to do it!

CONVERT JM/JMLM TO HLM/DLM (ALSO NEED TO CONVERT THEIR PARTNER TO AN IMV)

CRITERIA FOR CONVERSION

- Criteria for HLM/DLM are defined in the VTTA regulations (note it is no longer automatic on reaching age 80)
- For HLM, the Group Committee must approve
- For DLM, the NEC must approve a written recommendation by the member's group

PROCESS FOR CONVERSION

- Find each joint member in the VTTA member list and click on "Manage"
- Click on "Set as Resigned" for each member
- Unlink the website account and delete the email addresses from the JM profile, so they can be reused
- Add the member as a HLM/DLM as appropriate
- Add their previous joint member as an IMV
- Advise members to relink their CTT accounts if they want to race

VTTA ONLINE MEMBERSHIP SYSTEM FOR MEMBERSHIP SECRETARIES

If in doubt – ask an admin to do it!

ADDITIONAL NATIONAL OFFICIAL MEMBERSHIP FUNCTIONS

CHANGE GROUP MERGE MEMBERS DELETE MEMBER

VTTA ONLINE MEMBERSHIP SYSTEM FOR MEMBERSHIP SECRETARIES

ADMIN PANEL – VTTA MEMBERS – CHANGE GROUP



 A change of group cannot be actioned by a member or a group official. The member should contact the secretary of the group they want to move from or move to. That secretary should agree the change with the other group secretary and request a National official to make the change on the system.

The National official finds the member record in Admin Panel/VTTA members and selects Edit Member profile. They must change both the **Group and the Membership Category to the new group**. Then submit. Note the Member Category is suffixed with the group name to ensure the right sub is paid.

- If the person has not yet renewed, their new group secretary should tell them to now go in and renew, paying the correct sub.
- If the person has already renewed, then the two group secretaries should agree whether a corrective payment is needed.

MERGING MEMBERS

• When to Merge Members

- Use the "Merge Members" feature to combine two member records for the same person
- Members can get two member records when they register twice by accident

Merge Member Process

- Find the duplicate member records and make a note of the VTTA numbers
- Decide which VTTA number you wish to retain (normally the lowest and oldest number)
- Find the member record with the VTTA number you wish to discard
- Click on "Manage" and "Merge this Member" and in the "Member to Merge into" box enter the VTTA number of the member record you wish to retain

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🖀 Dashboard	Member: Test	FirstName1 TestLastN	Jame1 # Dashboard > Members > TestFirstName1
		🔒 Details 📃 🚍	Payments OAccount
📸 VTTA Members		Member Details	Etiit Member Details Merve this n
Donations		Title	Mr
🏲 Payment Logs	TestFirstNam	riel First name	TestFirstName1
	TestLastNam	Middle name	
┛ Records	 Individual Member 	ship Last name	TestLastName1
	Joined date 03/:	10/2017 Member Email Add	ress jon.fairclough@live.com
🌣 Content	< End date 31/	Group	Test group
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DELETING MEMBERS

- The Delete Member function should only be used to remove member records added in error or for test purposes
- Do not delete member records which have associated payment records – this creates anonymous records in the payment log which cannot be easily traced to a member
- Do not delete duplicating records use the merge member function

VTTA admin	=		Ju Jirolough
希 Dashboard	Member: TestFirstName1 TestLastName1		🏶 Dashboard > Members > TestFirstName1 TestLastName1 > ber Details
MEMBERSHIP		Q Dotails	
😁 VTTA Members		Member Details	Edit Member Details Meree this member Delete member
♥ Donations		Title	Mr
🏲 Payment Logs	TestFirstName1	First name	TestFirstName1
RECORDS	VTTA ID: 9999999	Middle name	
🛢 Records 🛛 <	Individual Membership	Last name	TestLastName1
CONTENT	Joined date 03/10/2017	Member Email Address	jon.fairclough@live.com
🕸 Content 🛛 🗸	End date 31/12/2020	Group	Test group
🏟 News 🗸	Status Paid Up	Club	TestClub
		Date of birth	01/01/1964
Forms <	Last Paid Date 07/02/2020 10:35	Gender	Male
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