Merging Member Records

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Quick Steps: Members > Members Listing > View Member Record > Merge > Search for the member you're merging with > Merge the old record into the new record

1. Within the Management Console, select **Members** from the top menu, then **Members Listing** from the left menu

2. Search for the member that is currently Financial that you will to merge the Unfinancial record into

3. Click the **View** icon next to the member's name, then select the **Merge** button at the top of the member record

4. Enter the first or last name of the member you wish to merge with and click the **Search** button. The matching members will then be listed on screen

5. Click on the Red or Green icon for the record you wish to merge from or to;

- If you are viewing the member record that you wish to keep, once you have searched for the secondary record to merge, use the **Green Icon** *(Preferred Method)*
- If you are viewing the member that you wish you remove, once you have searched for the secondary record to merge, use the **Red Icon**

6. Click **OK** to confirm the merge. **Note: that once the merge is completed, the records cannot be reversed**.

7. Click on the **Previous** button to return to the member's record

Additional Information: Always make sure that you're merging the **Unfinancial** record into the **Financial** record to ensure that your member maintains their financial status and their ability to access their membership.

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