Managing Member Profiles

User Guide

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Contents

About Member Profile Management

The following topics are covered in this section:

- What is a Member?
- Visitor Accounts and Organizational Accounts
- What About Membership Management?

What is a Member?

A member is any person who has an account that allows them to log on to Doubleknot on your web site.

Visitor Accounts and Organizational Accounts

There are two different kinds of member accounts:

- A *visitor account* is created when a visitor to your web site registers for a program or event, makes a purchase, or signs up for an email list. So that a visitor can return to view or update their registrations and purchases, the account is created even if the visitor chooses not to register or sign in when making a purchase. If a visitor registers another person for a program or event, a visitor account is created for that person as well.
- An *organizational account* is created or modified by a Doubleknot administrator to allow access to Doubleknot features. No one can access Doubleknot features without an organizational account.

The following table explains the differences between the two kinds of accounts.

Type of account	Created by	Default permissions	Web site view after logon
Visitor account	Visitor	Can only view personal account page and update profile, change password, view registrations and purchases, make payments, and sign up for mailing lists	Views web site as a visitor; Doubleknot administrator features are not displayed
Organizational account	Administrator	Assigned by administrator	Views the web site as an administrator—the Feature List, Administer Panel, and other Doubleknot functions that the member has permissions to access are displayed

What About Membership Management?

Membership Management is a Doubleknot module for organizations that sell memberships. If your organization uses the Membership Management module, membership management options will be visible on the Member Management page.

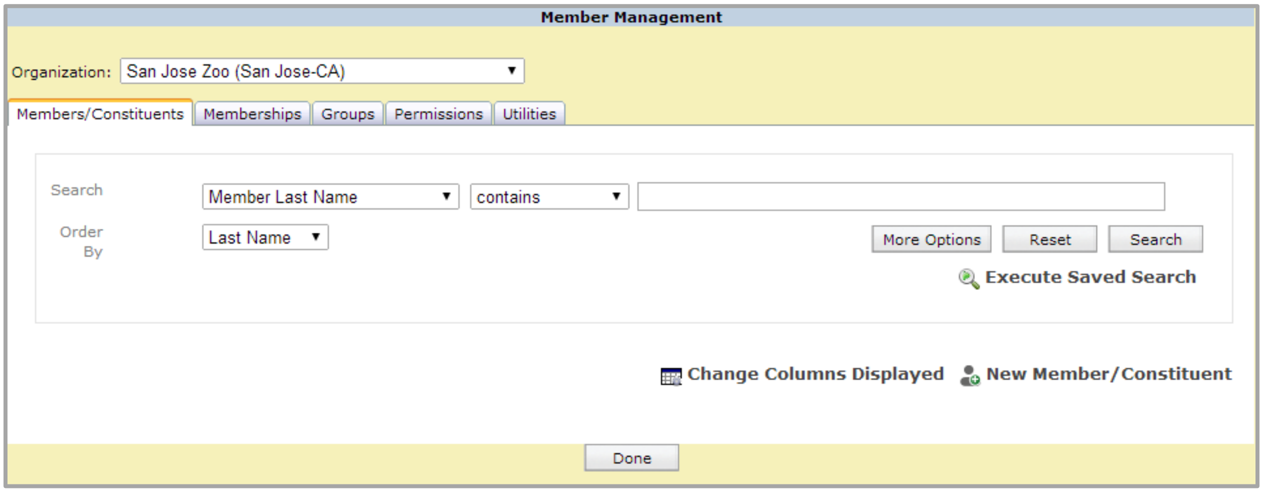
This document contains instructions for general member profile management to control who can log on to Doubleknot and what tasks they can perform. Membership Management features are not covered in this document.

Accessing Member Profile Management Features

Tasks associated with member profile management are accessed on the Member Management section. To view the Member Management section, follow these steps:

1. In the Administer panel on the main Doubleknot page, click **Member Management**. The Member Management section will be displayed, with navigation tabs for all member management features.
2. In the Organization menu, select the organization whose members you wish to manage.

The main Member Management section



Creating and Editing Member Profiles

This section contains instructions for creating and editing member profiles. The following topics are covered:

About Member Profiles

Member profiles are the records that contain information about each member account. Member profiles are created and modified on the Create and Edit Member Profile page.

NOTE: The fields displayed on this page are set using the Profile Attributes feature in the Utilities tab. Your organization may have chosen to display different fields for member profiles than the ones that are described in this section.

Creating a Member Profile

To begin the process of creating a new member profile, follow these steps.

1. In Member Management panel, click the **Members/Constituents** tab.
2. In the lower right corner of the page, click **New Member/Constituent**. The Create and Edit Member Profile page will be displayed with the fields that your organization defined in Profile Attributes.
3. Enter the requested information in the fields.

Entering Special Information

Special information includes whether the member is a minor; whether the member can update their own user ID, password, and member profile; and whether the account should be assigned minimal Doubleknot administrator privileges. To enter special information about the member, follow these steps:

1. If the member is a minor, select **Member is a minor** in the Restricted Notation area.
2. If the member should not be allowed to update their user ID and password, select **Member cannot update their user ID, password or profile** in the User Type area.
3. If your organization is using the Positions feature, select the member's position in the organization from the Current Position menu. If the position is not listed, enter it in the Position (If Not In List) field at the right.
4. If the member should have organizational privileges to log on to Doubleknot, click the checkbox next to **Default privileges include access to the Membership Directory and Communications Center** in the Turn On Default Privileges area. Selecting this option creates an organizational account instead of a visitor account.

Sending the Member a Logon ID and Password

To send the member a logon ID and password, follow these steps:

1. In the Primary Email field, enter the member's email address.
2. In the Member Logon item, select **Create a default logon ID and password if one does not already exist for this member**.

Saving the Member Profile

1. At the bottom of the page, click **Add/Update**. The member account will be created.
   - If you did not send the member a logon ID and password, a blank Create and Edit Member Profile page will be displayed so you can continue creating member profiles.
   - If you chose to send the member a logon ID and password, the Logon Access Information page for the new member will be displayed. To return to a blank Create and Edit Member Profile page, click **OK**.
2. To create additional member profiles, follow the steps in the preceding sections to information for each new member.
3. When you're finished creating member profiles, click **Go Back**. The Members/Constituents page will be displayed.

Searching for Member Profiles

The following topics are covered in this section:

- Looking Up a Member Profile
- Changing the Display of Search Results
- Downloading Search Results
- Working with Saved Searches

Looking Up a Member Profile

To look up a member profile, follow these steps:

1. In Member Management, click the **Members/Constituents** tab. You will enter search criteria on this page.
2. In the Search menu, select the criteria you want to use to search for the member. For example, to search for a member by last name, select **Member Last Name**.
3. In the middle menu, select one of the following:
    - **Contains**—The characters you enter can appear anywhere in the search results For example, if you're searching by Member Last Name Contains and enter **Land**, you'll retrieve records including last names Land, Moreland, Landon, and Flanders.
    - **Does not contain**—The text you enter must not appear in the results. This command is generally used to limit the results of a more general search term.
    - **Equals to**—The text must be an exact match for the search result. For example, if you're searching by Member Last Name Equals To and enter **Land**, you'll only retrieve records for members whose last name is Land.
4. In the text entry field at the end of the row, enter the text that you're searching for.
5. To enter additional search criteria, follow these steps:
    - Click **More Options**. A new row of options will be displayed.
    - In the first menu, select **And** if the search results should meet both search criteria or **Or** if the search results can meet one or the other search criteria
    - Follow steps 2-4.
6. In the Order By field, select the way that the results should be displayed. For example, selecting Last Name displays the results alphabetically by last name.
7. Click **Search**. Members matching the criteria you entered will be displayed.
8. Locate the member you're looking for, and click **Details**. The Member Details page will be displayed. Information about the Member Details page is located in Information on the Member Details Page.

Changing the Display of Search Results

To change the data that is displayed in the search results, follow these steps:

1. Click **Change Columns Displayed**. The Result Sequence Arrangement page will be displayed.
2. To add or remove a field from the search results, select or deselect the field name in the Result Fields column.
3. To change the order of the data in the search results, use the **Up** or **Down** arrow in the Order column to move the field to the desired location.

4. To save your changes, click **Save**.
5. Click **Done**. The search page will be displayed, and the results will show the data in the way you defined.

Downloading Search Results

The results of any search can be downloaded as a .CSV file that is compatible with Microsoft Excel and other spreadsheet programs. To download the results of a search, follow these steps:

1. Follow the steps in Looking Up a Member Profile to set up and execute the search.
2. Above the search results, click **Download Search Result**. The result will be downloaded in a .CSV file to the default location for downloads configured in your browser.

Working with Saved Searches

Doubleknot makes it possible to save your search parameters to use at another time. For example, if you frequently have to look up members in a specific zip code, you can save that search so that you don't have to re-enter the criteria every time you want to find those results.

Saved searches can also be used to identify recipients for Communications Center messages.

Saving the Search

To save a search, follow these steps:

1. Follow the steps in Looking Up a Member Profile to set up and execute the search.
2. Below the area where you entered the criteria, click **Save Search**. The Saved Searches page will be displayed.
3. In the Description For Your Search field, enter a name to identify the search.
4. Click **Save**. The search will be saved. When you return to the Members/Constituents page, the **Execute Saved Search** item will be displayed.

Accessing a Saved Search in Member Management

To access a saved search in Member Management, follow these steps:

1. In the Members/Constituents tab, click **Execute Saved Search**. The Saved Searches page will be displayed.
2. In the Search Description column, click the name of the search you want to run. The Members/Constituents page will be displayed with the current results of the search.

Accessing a Saved Search in Communications Center

If you use the results of a saved search as a mailing list in Communications Center, the search will be executed at the time that the email is sent. As a result, the email will go to all the members who meet the search criteria at that time, even if their member profiles were created after you saved the search.

To use the results of a saved search as a mailing list in Communications Center, follow these steps when the message is ready to send:

1. In the message that you wish to send, click **Add Recipients**. A list of options will be displayed.
2. Select **From Saved Membership Searches**. The window will update to allow you to locate and select the saved search.
3. In the Organization menu, select the organization in which the search was saved. A list of saved searches in that organization will be displayed.
4. Select the search or searches you wish to use.
5. Click **Include**. The recipients for the Communications Center message will include the members in the current results for the saved search.

Working With Member Profiles

The following topics are covered in this section:

- Information on the Member Details Page
- Editing a Member Profile
- Creating and Editing a Logon Account
- Assigning the Member to Elists and Groups
- Viewing Registrations, Orders, and Reservations
- Viewing Donations
- Viewing Member Relationships, Positions, and Achievements
- Managing Contact Notes
- Deleting a Member Profile

Information on the Member Details Page

The Member Details page contains the following sections:

- **Member Profile**—Summarizes information on the Member Profile page. To change this information, click **Edit Member Profile** and follow the steps in Creating and Editing a Member Profile.
- **Logon Account Privileges**—If the account has logon privileges, displays the user ID and permissions. In this section, you can create a logon account, edit the logon ID and password, assign permissions, and merge duplicate profiles. (Information about assigning permissions is located in Assigning Organizations and Access Permissions.)
- **Elists and Groups**—Shows Elists and groups to which the member is assigned. In this section, you can add or remove Elists and groups.
- **Memberships**—If your organization uses the Membership Management module, membership information is displayed here.
- **Registrations, Orders, and Reservations**—Displays all of the member's online purchases.
- **Donations**—Displays all of the member's contributions to fundraising campaigns.
- **Member Relationships**—Displays the member's relationship to other member.
- **Positions**—Displays the member's position(s) in the organization.
- **Achievements**—Displays the member's achievements.
- **Contact Notes**—Displays and allows you to update notes about your organization's personal contacts with this member.

NOTE: Your organization might not use all of these features.

Member Details page (partial view)

Editing a Member Profile

To display and edit a member profile, follow these steps:

1. Look up and display the Member Details page for the member. (In the search results, click **Details** at the right of the member's name.)
2. Click **Edit Member Profile**.
3. Follow the steps in Creating and Editing Member Profiles to add, change, or remove information.
4. Click **Add/Update**. The profile will be updated and the Member Details page will be displayed again.

Creating and Editing a Logon Account

If the member does not have a logon account, you can create a logon account for them. If the member has a logon account, you can change the member's logon ID and password.

Creating a Logon Account

To create a logon account for the selected member, follow these steps:

1. In the Logon Account Privileges section, click **Create Logon Account**. (This option is only displayed if the member doesn't have a logon account.) The Create and Edit Member Profile page will be displayed.
2. In the Primary Email field, enter the member's email address if it is not already displayed.
3. In the Member Logon section, select the checkbox next to **Create a default logon ID and password if one does not already exist for this member**.
4. Click **Add/Update**. The Logon Access Information page will be displayed, containing the user ID and default password for the account, and the member will receive an email with the logon information.

5. Click **OK**. The Member Details page will be displayed, and the **User ID and Password** link will be the first item in the Logon Account Privileges section.

Editing the Member's User ID and Password

To change the member's user ID and/or password, follow these steps:

1. In the Logon Account Privileges section, click **User ID and Password.** A page to change the user ID and password will be displayed.
2. To assign a new user ID, type it in the New User ID field.
3. To assign a new password, follow these steps:
    - In the New Password field, type the new password.
    - In the Confirm New Password field, type the new password again.
4. Click **Update/Create**. The information you entered will be saved and the Member Details page will be displayed.

Merging Duplicate Profiles

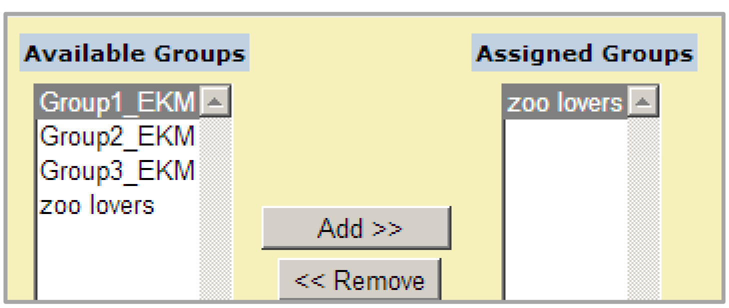
This feature is typically used to merge duplicate visitor accounts. Instructions are located in Merging Duplicate Profiles within the Visitor Account Management section.

Assigning the Member to Elists and Groups

To assign the member to Elists and groups, follow these steps:

1. In the Elists & Groups section, click **Edit Member Elists/Groups**. The User Groups page will be displayed.
2. In the Available Groups column, select the desired group.
3. Click **Add>>.** The group will be added to the Assigned Groups column.
4. Follow steps 2-3 to assign additional groups.
5. To remove a group, select the group name in the Assigned Groups column and click **<<Remove**.
6. Click **Done**.

Assigning a member to a group.



The assigned groups are displayed on the Member Details page.

Viewing Online Purchases and Donations

The Member Details page shows all of the member's online registrations, orders, reservations, and donations.

- The Registrations, Orders and Reservations section contains a list of the member's five most recent online purchases. To view a complete list, click **View all event registrations for <member name>**.
- The Donations section contains a list of the member's five most recent donations. To view a complete list, click **View all donations for <member name>**.

Viewing Member Relationships, Positions, and Achievements

If your organization is using the Member Relationships, Positions, or Achievements features, you can view this information for the member in those sections.

Managing Contact Notes

The Contact Notes feature allows you to keep track of each time someone from your organization has personal contact with the member. This can be helpful in organizational tasks including volunteer management and fundraising.

Creating a Contact Note

To create a Contact Note, follow these steps on the Member Details page:

1. In the Contact Notes section, click **Manage Contact Notes**. The Member Notes page will be displayed.
2. In the Type menu, select the type of contact:
    - **Email**
    - **In Person**
    - **Telephone Call**
    - **To Do**
3. In the Note field, enter information about the recent contact with the person.
4. Click **Add**. The note will be added to the Existing Notes section.

Editing a Contact Note

To edit a contact note, follow these steps:

1. In the Action column for the note, click **Edit**. The contents of the note will be displayed at the top of the page.
2. Edit the note as desired.
3. To save your changes, click **Update**.

Deleting a Contact Note

To delete a contact note, follow these steps:

1. In the Action column for the note, click **Delete**. A confirmation page will be displayed.
2. Click **Yes**. The note will be deleted.

Deleting a Member Profile

To delete a member profile, follow these steps:

1. Display the Member Details page for the member.
2. At the bottom of the page, click **Delete Member**. A confirmation page will be displayed.
3. Click **Yes**. The member will be deleted and the Members/Constituents page will be displayed.

Assigning Organizations and Access Permissions

This section contains information about assigning organizations and access permissions to accounts. The following topics are covered:

- About Organizations and Permissions
- Getting Started
- Assigning and Removing Access to Organizations
- Assigning and Removing Permissions
- Saving Your Changes

About Organizations and Permissions

Doubleknot is configured to reflect the structure of your business with one master organization that represents the overall business and as many sub-organizations as needed to mirror your operational departments.

For example, consider the fictional San Jose Zoo. The master organization in Doubleknot would be the San Jose Zoo. Different departments within the San Jose Zoo—including Education, Marketing, and Accounting—are configured as sub-organizations within the master organization.

In Doubleknot, every organizational account holder can be assigned to one or more organizations. If they are assigned to an organization, then they can access Doubleknot features and data for that organization. The specific features that they can access within each organizations controlled by permissions.

When you create a new member profile, the only Doubleknot permissions that you can assign to on the Create and Edit Member Profile Page are access to the Membership Directory and the Communications Center. The procedures in this section contain information about assigning permissions to access other Doubleknot features.

NOTE: If you need to assign similar permissions to more than one user, consider setting up user roles. This allows you to define a set of permissions and assign them at once by assigning a user to that role. More information is located in Setting Up Roles.

IMPORTANT: Event Administrator Permissions for Posting Offline Payments

If an administrator will need to post offline payments for items in Event Management (calendar activities, programs, or facility bookings), the administrator must have at least read-level privileges for that kind of event in the sub-organization where the event was created.

For example, if a member of your staff will be posting mail-in check payments for a marketing fundraiser configured as a calendar activity and educational summer camps configured as programs, she must have at least read-level Event Management privileges in the marketing sub-organization and read-level Program Management privileges in the education sub-organization.

Getting Started

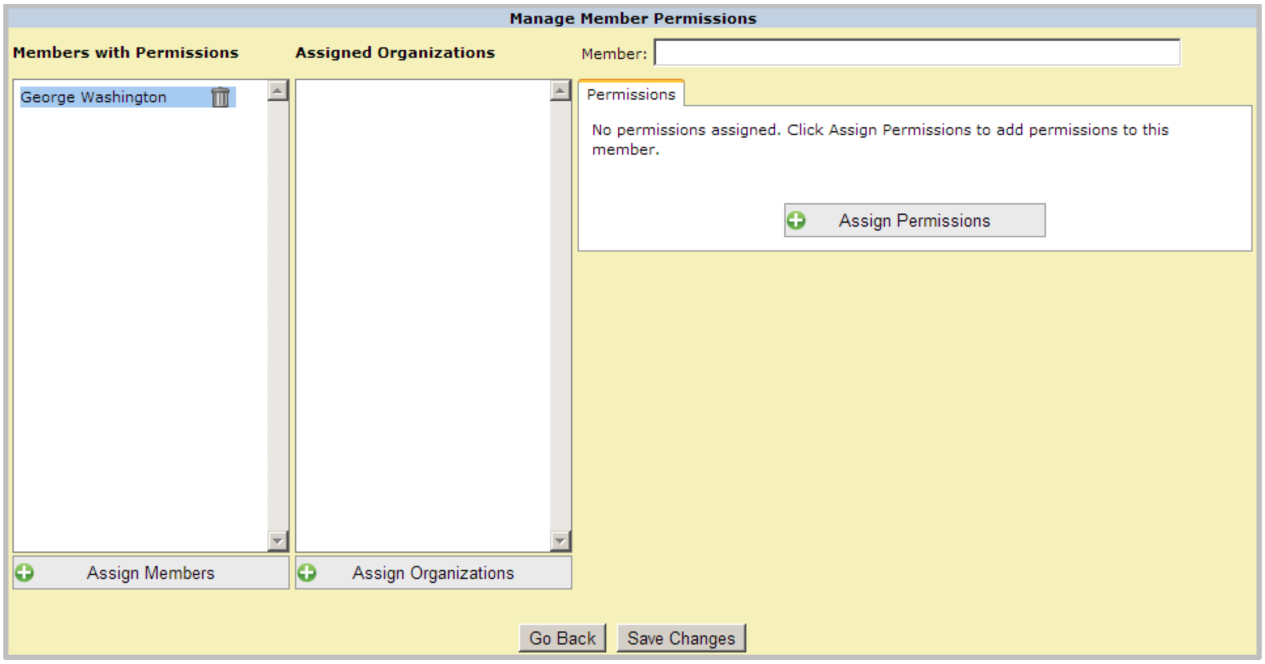
This section contains instructions to begin the process of assigning organizations and permissions. You can assign organizations and permissions for a single member from the Member Details page, or you can select from a list of all members.

From the Member Details Page

To assign a single member to organizations and set access permissions, follow these steps:

1. Display the Member Details page for the member.
2. Click **Edit Permissions**. The Manage Member Permissions page will be displayed.

Manage Member Permissions page for a member who is not assigned to an organization and has no assigned permissions.



For Multiple Members of an Organization

To display all the members of an organization, follow these steps:

1. In Member Management, click the **Permissions** tab.
2. Click **User Permissions**. The Manage Member Permissions page will be displayed, with all members of the selected organization displayed in the Members with Permissions column. .

Assigning and Removing Access to Organizations

To assign a member to one or more organizations, follow these steps:

1. In the Members with Permissions panel at the left, select the member whose account you want to work with.
2. At the bottom of the Assigned Organizations panel, click **Assign Organizations**. The Assign Organizations window will be displayed.
3. Click the box next to each organization that you wish to assign to the account.
4. Click **Add Selected**. The account will have access to the selected organization(s).

To remove access to an organization from an account, follow these steps:

1. At the bottom of the Assigned Organizations panel, click **Assign Organizations**. The Assign Organizations window will be displayed.
2. Click the trash can next to the name of the organization you wish to remove. A confirmation dialog box will be displayed.
3. Click **Yes** in the confirmation dialog box.

Assigning and Removing Permissions

To provide our clients with fine-grained control over access to different features, Doubleknot supports more than 30 different kinds of user permissions. Detailed information about available user permissions is located in Doubleknot User Permissions.

Please note the following important information about permissions:

- If a user already has permissions assigned because of a role, the permissions associated with the role will be displayed in the Permissions tab. Role-based permissions can not be modified or deleted.
- If the member is assigned to more than one organization, follow these procedures for each organization to which the member is assigned.

Assigning Permissions

Before you assign permissions to a member, you must assign the member to at least one organization. Follow the steps in the preceding section to assign organizations.

To assign permissions to a user, follow these steps.

1. Make sure that the user's name is selected at the left.
2. In the Assigned Organizations column, select the organization for which you are assigning permissions.
3. At the right side of the Manage Member Permissions page, click **Assign Permissions**. The Assign Permissions window will be displayed.
4. Click the checkbox for each kind of permission that the new account should have.
5. When you've selected all the permissions for the account, click **Add Selected**. The Manage Member Permissions page will be displayed, with each kind of permission listed in the Permissions tab.

Assigning Different Levels of Access

By default, the account will have administrator privileges for each Doubleknot feature. However, the following features support multiple levels of privileges:

- Facilities Management
- Event Management
- Program Management
- Member Profile Management
- Membership Management

If you want to assign the user a different level of permission, follow this step:

1. In the pop-up menu at the right of the permission name, select the desired permission level:
    - **Reports**—The member can only view reports for this feature.
    - **Read**—The member can read information entered for this feature in addition to viewing reports.
    - **Update**—The member can update information for this feature in addition to the above privileges.
    - **Create**—The member can create new entries for this feature in addition to the above privileges.
    - **Delete**—The member can delete entries for this feature in addition to the above privileges.
    - **Administrator**—The member has full access for this feature including creating, updating, deleting, and viewing reports.

Removing a Permission

To remove a permission, follow these steps:

1. At the right of the permission, click the **Delete** (trash can) icon. A confirmation dialog box will be displayed.
2. Click **Yes**. The permission will be removed.

NOTE: If a permission is associated with an assigned role, you can not modify or remove the permission. More information about roles is located in Setting Up Roles and Permissions.

Saving Your Changes

To save your changes, follow these steps:

1. When you're done assigning organizations and permissions, click **Save Changes**.

Doubleknot User Permissions

The following chart lists all user permissions in Doubleknot. Depending on how Doubleknot is configured, some of these permissions may not be available for your organization.

Permission	Allows User To…
Communications Center - Administer	Access Communications Center functions but not send messages
Communications Center - Broadcast	Send messages from Communications Center (should be assigned in conjunction with Communications Center – Administer)
Discounts Administration	Access the Discounts module
Event Management*	Access the Calendar Activities, Dues, and Fundraisers features in Event Management
Event Reports	Access Event Reports from the Administer panel
Facilities Management*	Access the Facilities module
Financial Account Management	Access Financial Accounts
Forums	Create and manage forums
Library Documents	Upload or remove documents in the document library
Member Directory	Access the Member Directory
Member Profile Management*	Create and manage member profiles; configure user roles and permissions; and create and manage groups/Elists.
Membership Management*	Access the Membership Management module
Microsoft Office Templates	Administer templates for merging data with Microsoft Word
Newsletters	Access the Newsletter feature to create and send newsletters
Newsletters - Templates	Create and modify newsletter templates
Newsroom (RSS)	Access the Newsroom
Packages	Administer Packages
Photo Albums	Create and manage photo albums
Program Management - Administer Classes	Create classes as session events within Programs
Program Management – Class Instructor	Serve as instructor for a class within Programs
Program Management 1*	In conjunction with Program Management 2, access Programs in Event Management
Program Management 2	In conjunction with Program Management 1, access Programs in Event Management
Recurring Payment	Access the Recurring Payments module
Report Writer	Create new reports with the Report Writer tool
Site Brander	Access all features of Site Brander
Site Brander Draft Editor	Draft revisions to existing pages that must be approved
Site Brander Limited	Edit home page and content pages only (no access to advanced features)
Site Brander Lite	Edit only the home page, header, and footer
Store Catalog Management	Administer all features of the online store except overall store configuration
Store Configuration Management	Administer all features of the online store

* These permissions have multiple levels of access as described in Assigning Different Levels of Access.

Setting Up Roles

This section covers the following topics:

- About Roles
- Before You Start
- Creating a Role
- Assigning Permissions to a Role
- Assigning Organizations to a Role
- Assigning Groups/Elists to a Role
- Assigning Members to a Role

About Roles

A role is a collection of permissions defined for a specific function in your organization. Roles are generally associated with the person's department and specific job duties. For example, marketing staff might be assigned to a role that allow them to use Site Brander to update the web site; Event Management; and Communications Center to send emails to people signed up for an Elist.

When you assign a member to a role, they are automatically granted all of the permissions associated with that role at the same time. This makes it easy to manage permissions for new staff. For example, if your organization hires a new marketing coordinator, you can assign them to the "marketing coordinator" role instead of looking up all the permissions that a marketing coordinator should have and assigning them individually.

Before You Start

Before you begin creating roles, you should document the following:

- The name and a brief description of the role
- The organizations that members assigned to the role can access
- The permissions that should be assigned to the role
- The groups/elists that should be assigned to the role

Maintaining information about each role will make it easy to set up roles and to assign members to the correct roles. The following table is a simplified example of the kind of documentation you should create before you begin to set up roles.

Role	Organizations	Permissions	Groups/Elists
Administrators	All	All	All
Marketing staff	Marketing	Communications Center Newsroom RSS Event Management	Volunteer News Monthly Newsletter Special Offer Emails
Education staff	Education	All Program Management permissions Library Documents Newsroom RSS	Education News
Accounting staff	Finance	Manage Financial Accounts	
Volunteers	Master organization	Newsletters	Volunteer News

NOTE: You can assign additional organizations, permissions, and Elists/Groups to users who are assigned to roles.

Creating a Role

To create a new role, follow these steps:

1. In Member Management, click the **Permissions** tab.
2. Click **Permission Roles**. The Permission Roles page will be displayed.
3. In the Role Name field, enter the name of the role you wish to create.
4. Click **Save Role**. The role will be saved and displayed in the Existing Roles column at the left.

Assigning Permissions to a Role

To assign permissions to a role, follow these steps:

1. On the Permission Roles page, select the role in the Existing Roles column.
2. Click the **Permissions** tab.
3. Click **Assign Permissions**. The Assign Permissions window will be displayed.
4. Select the permissions to assign to this role.
5. Click **Add Selected**. The Permissions tab will display the permissions you selected.
6. If you selected one or more permissions with additional access levels, select the desired level of access for each permission.
7. Click **Save Role**. The changes to the role will be saved.

NOTE: Information about permissions is located in Assigning and Removing Permissions and Doubleknot User Permissions.

Assigning Organizations to a Role

To assign organizations to a role, follow these steps:

1. Select the role in the Existing Roles column.
2. Click the **Organizations** tab.
3. Click **Assign Organizations**. The Assign Organizations window will be displayed.
4. Select the organizations for this role.
5. Click **Add Selected**. The Organization tab will display the organizations you selected.
6. Click **Save Role**. The changes to the role will be saved.

Assigning Groups/Elists to a Role

To subscribe the role to groups/Elists, follow these steps:

1. Select the role in the Existing Roles column.
2. Click the **Assigned Groups** tab.
3. Click **Assign Groups**. The Assign Groups window will be displayed.
4. Select the groups/elists for this role.
5. Click **Add Selected**. The Groups tab will display the groups/elists you selected.
6. Click **Save Role**. The changes to the role will be saved.

Assigning Members to a Role

To assign one or more members to a role, follow these steps:

1. Make sure each member you wish to assign to a role has an organizational logon account.
2. Select the desired role in the Existing Roles column.
3. Click the **Assigned Members** tab. The Assign Individuals window will be displayed.
4. To locate each member you wish to assign, follow these steps:

- Enter search criteria at the top of the window.
- Click **Search**.
- In the search results, select the member or members you wish to assign to the role.
- Click **Add Selected**. The selected member or members will be assigned to the role.

5. Repeat step 4 for each member you wish to assign to the role.
6. Click **Save Role**. The members will be assigned to the role.

Visitor Account Management

Visitors to your web site create accounts to register for events or programs, make donations, purchase items, sign up for mailing lists, and more. Visitors who do not go to your web site frequently or who use a computer where their password is not saved may need assistance finding their logon name and/or password. This section covers the following topics:

- Helping a Visitor Recover a Password
- Helping a Visitor Who Did Not Log On Find Their Account
- Helping a Visitor Who Did Not Create a Logon Account
- Assigning a Password for Visitors Who Can't Find Their Records
- Merging Duplicate Profiles

Helping a Visitor Recover a Password

The best way to help a member with a visitor account recover a password is to instruct them to use the automatic password recovery feature. Instruct the member to follow these steps:

1. Go to the logon page.
2. Click **Forgot Password?** The Recover Your Password page will be displayed.
3. Enter the email address associated with the account.
4. Click **Send Email**.

If the member is unable to remember the email address used to create their account, you can look up the email address associated with the account for them. To do so, follow these steps:

1. Look up their account using the search procedures in Searching for Member Profiles.
2. Provide the member with the email address associated with the account.
3. Instruct the member to click the **Forgot Password?** link on the logon page and follow the steps to receive an email with a link to reset the password.

Helping a Visitor Who Did Not Log On Find Their Account

Every purchase in Doubleknot is associated with an account. However, Doubleknot can be configured so that one or more kinds of purchases can be made without logging on. Depending on the information that a customer enters when making a purchase without signing in, the purchase might be associated with an existing account or a new account might be created.

The following table describes what happens when a customer makes a purchase without signing in and how the customer can ensure that they can log on to review their purchases.

If the visitor who made a purchase without logging on…	And when they made the purchase, they entered….	This happens:	Next steps
Already has a logon account	The same first name, last name, and email address as their existing account	The purchase is associated with the existing account, even though they didn't sign in	The visitor should log on with their regular account; the purchase will be correctly displayed.
Already has a logon account	A different first name and/or last name with the same email address	A new account is created with information about the new purchase. However, because the same email address is on both accounts, Doubleknot recognizes that the two accounts are for the same person, and provides instructions to merge the accounts.	The visitor should click the **Forgot Password** link and request a password using their email address. The system will recognize that there are two profiles with the same email address, and send instructions on merging the accounts.
Already has a logon account	A different email address from their existing account	A new account is created with information about the new purchase. Because the two accounts do not have the same email address, Doubleknot does not recognize the accounts as belonging to the same person. An administrator must merge the accounts.	An administrator should follow the steps in Merging Duplicate Profiles (Administrators) to merge the two profiles that have different email addresses. Be sure to ask the visitor which email address and logon information should be retained when the profiles are merged.
Does not have a logon account	(Not applicable, because the first name, last name, and email have not already been used to create an account)	A new visitor account is created but the visitor does not have logon information for it.	The visitor should follow the steps in Helping a Visitor Retrieve the Password for a New Account.

Helping a Visitor Retrieve the Password for a New Account

If the visitor never created a member account, an account is created for them even though they chose not to register. This is necessary to allow the visitor to view, make payments for, and modify (if allowed) purchases. To help this kind of member log on, instruct the member to follow these steps:

1. Click the **Logon** button.
2. At the right of the Password field, click **Need Password?** A page to enter information that identifies the member will be displayed.
3. In the Number field, enter the membership, booking or registration number for their purchase. They can locate this information on their confirmation or receipt email.

4. Enter information in the following fields:
    - First name
    - Last Name
    - Address
    - City
    - State
    - Zip Code
    - Email Address
    - Re-enter Email Address

    NOTE: This information must exactly match what they provided when they made the purchase. They can check their confirmation or receipt email to ensure that they are entering the correct information.
5. Click **Continue**. If the record was found, an email with instructions to set a password will be sent to their email address.

If the visitor can't retrieve their information, use the procedure Assigning a Password for Visitors Who Can't Find Their Records.

Assigning a Password for Visitors Who Can't Find Their Records

If a person tries the previous procedure but receives the message **There is no profile matching the information provided**, you can look up the member profile and assign them a logon password. To do so, follow these steps:

1. Look up their account using the search procedures in Looking Up a Member Profile.
2. In the Action menu, click **Details**. The Member Details page will be displayed.
3. In the Logon Account Privileges section, click **User ID and Password**. A page to enter a new user ID and password will be displayed.
4. Make sure that the New User ID field is blank. Some browsers may automatically populate this field with information. If the field isn't blank, the user ID will be changed.
5. In the New Password field, enter a new password. This password is temporary, so enter something easy to remember.
6. In the Confirm New Password field, enter the new password again.
7. Click **Update/Create**. The password will be assigned to the account.
8. Instruct the member to log on with the temporary password. As soon as they log on, they'll be required to create a new password for the account.

Merging Duplicate Profiles (Administrators)

If a visitor unintentionally creates duplicate profiles, Doubleknot provides the opportunity to merge duplicate profiles if they follow the **Forgot Password?** link. In addition, Doubleknot provides administrators with a mechanism to merge multiple duplicate visitor accounts into a single visitor account that contains complete information from all accounts for purchases, registrations, donations, memberships, and elist subscriptions.

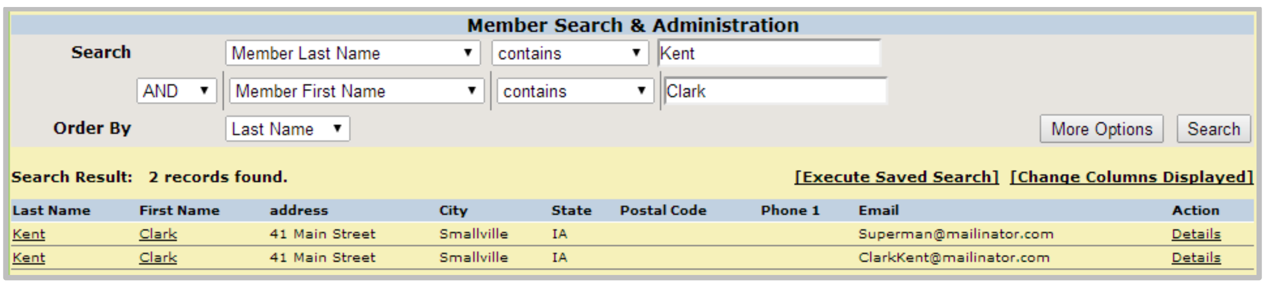
Understanding Duplicate Profiles

Doubleknot identifies members by checking the first name, last name, and email address. The following conditions can result in a new member account being created for the same person:

- If the same person who already has an account purchases an item without signing in and uses a different first name, last name, or email address, a new member profile is created. For example, if user John Doe made one purchase under the name J. Doe with email address JDoe@mailinator.com and another purchase with the name John Doe with email address JohnDoe@mailinator.com, there will be two different records in Doubleknot.
- If a registration owner adds a participant who already has a visitor account to their registration without providing sufficient information to identify the member, a new account will be created for the participant. For example, if the registration owner only enters a first name and last name for the participant without an email address, a new profile will be created.
- If a registration owner adds a participant who already has a visitor account but provides a different first name, last name, and/or email address for the participant, a new profile will be created.

In the following example, two visitor accounts have been created for member Clark Kent. However, only one account in the list has complete contact information. After confirming which email address is correct, you may wish to merge the other records into that member profile.

Example: Member Clark Kent has two member profiles with different email addresses.



How Merging Profiles Works

The following terms are related to merging duplicate profiles:

- The target profile is the profile that will receive the merged information. The target profile is generally the one that you are viewing when you begin the process to merge duplicate profiles.
- The merge profiles are the profiles that you select to merge into the target profile. Some of the information in the merge profiles will not be copied into the target profile.

WARNING: When you merge profiles, some information from the profiles to merge, including contact information, logon ID, and password, will be deleted. The following table describes which information from the profiles to merge is added to the target profile and which information is not.

Information in the merge profiles	After merging, this information is:
Member Profile information	Deleted
Logon Account Privileges	Deleted
Elists & Groups	Added to target profile
Memberships	Added to target profile
Registrations, Orders, and Reservations	Added to target profile
Donations	Added to target profile
Member Relationships	Deleted
Positions	Added to target profile
Contact Notes	Deleted

Merging the Duplicate Profiles

To merge duplicate profiles, follow these steps:

1. Make sure that the displayed member profile is the target profile (the one whose contact information you wish to maintain)
2. In the Logon Account Privileges section, click **Merge Duplicate Profiles**. The Merge Duplicate Member Accounts page will be displayed.
   - The profile in italics at the top of the list is the target profile. By default, the information from this profile is displayed in the fields at the bottom of the page.
   - The profiles in plain text have been identified as possible matches for the target profile. A higher percentage indicates a more likely match.
3. If a profile you wish to merge is <u>not</u> displayed, follow these steps to locate the member's profile:
   - In the menu at the top of the page, select **Last Name** (the default) or **User ID**.
   - Enter the last name or user ID of the profile you wish to add to the merge list.
   - Click **Search**. Profiles matching your search criteria will be displayed in the list.
4. Select each profile that you wish to merge into the target profile by clicking the checkbox in the Merge column.
5. By default, the data fields at the bottom of the page display information from the target profile. You can select or enter information in these fields to create the most accurate member profile after the merge:
   - To select an entry for a field from one of the merge profiles, click the mouse in the field. A pop-up menu will be displayed from which you can select
   - To enter new information for a field, type the information in the field.
6. When the data fields display the most complete and correct information for the merged profile, click **Save & Merge Selected Profiles**. The selected profiles will be merged into the target profile and will contain the information you selected or entered in step 5.

On the Merge Duplicate Member Accounts page, you can select member information from multiple profiles to create a single complete and accurate profile.