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## Re-Assign Membership Numbers for Expired Members

The Member Tracking System is designed to allow you to assign your own membership numbers or choose the next number available.

The ideal way to use the system is to begin entering your members and use the CALC button which will assign number 1, 2, 3 and so on. Numbers can be assigned up to 999999 in each unit/site or numbers can be assigned across the organization

If you have used your own numbering system and would like to re-assign the membership numbers in numerical order then follow the steps below:

1. Click on the Procedures button on the Main Menu
2. Click on the Admin Membership Tools tab
3. Click on the Re-Assign Membership Numbers button

### **RE-ASSIGN EVERYONE STARTING AT #1**

4. **FIRST** click on Re-assign All Membership to 0 and Delete Membership Prefixes – this will remove any prefixes you may have put in place and make all members have a number of 0.

5. Then click the Re-Assign button
6. Click Yes on the confirmation window
7. Click OK when it says the numbers have been reassigned
8. Repeat for each Current Unit in the dropdown near the top of the screen

9. SECOND click on the Renumber All Members Sequentially (Starting with Membership # 1)

10. Then click the Re-Assign button

11. Click Yes on the confirmation window

12. Click OK when it says the numbers have been reassigned

13. Repeat for each Current Unit in the dropdown near the top of the screen

- a. Choose Starting with 1 if you want each unit to have a number 1, 2, 3, etc.
- b. If you want to number members across units and the first unit has 79 members as in the example above, then choose the second Unit and fill in the next number 80 to continue the numbers in sequence

Your membership numbers will now be in numerical order beginning with 1 and each time you add a new member it will use the next available number in the system

Membership Numbers can be calculated within Specific Units or across an Organization and that can be set in Local/Station Settings, on the Local Settings 1 tab

## **RE-ASSIGN MEMBERS WITH EXPIRED MEMBERSHIP to 0**

14. Click the Open U.S.E. button at the bottom and choose:

- a. Time Frame = Latest Expiration Date between 1/1/2000 and 1 year ago or 12/31/ of the previous year you are in
- b. Or choose any other options on the U.S.E. that you need
- c. Click Continue

Universal Selection Engine - Selects People

All Members in the System

Individual Member Last, First:  Memb #:   Active Only

Attended  Any 'Club Attendance' Activity  at least  day(s)

between: 08/01/2017 and: 06/30/2018 Example Set Rules

Enrolled at least one day

between: 01/01/2018 and: 07/10/2018 Example

Latest  Entry Date

between: 05/01/2018 and: 05/31/2018 Example

Latest  Expiration Date

between: 01/01/2000 and: 12/31/2017 Example

Enrolled OR Attended at least one day (Club Attendance' Activity) using 'Set Rules' above

between: 01/01/2018 and: 06/30/2018 Example

All Members Currently Present (signed In to but not Out of any In/Out Activity for today)

Reset Grouping Tools ? Mark None Mark All Count Continue Cancel

Select a Report Re-Assign Membership Numbers

15. Click Re-assign All Membership to 0 and Delete Membership Prefixes – this will remove any prefixes you may have put in place and make all members have a number of 0.

16. Then click the Re-Assign button

17. Click Yes on the confirmation window

18. Click OK when it says the numbers have been reassigned

19. Repeat for each Current Unit in the dropdown near the top of the screen

Your members whose membership has expired will now be 0 and the membership numbers that were in use by those expired members will now be available to use again

NOTE: Below are a few examples of how organizations renumber membership numbers

- Some organizations will renumber membership numbers to 0 at the end of each enrollment period. This allows the system to begin using those old numbers over again.
- Some organizations will continue their membership numbers for years
- Some organizations will renumber everyone to 0 each year and start over at number 1
- Some organizations want to renumber members with expired membership to 0 in order to reduce mistakes when typing in a membership number for attendance