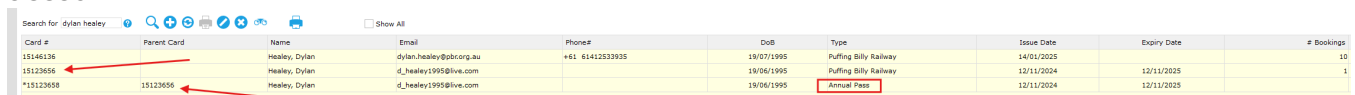


How to: Merge a Member into another Members Account

This is also the process on how to add a separately booked pass for a companion into the paid members portal.

1. Get the member numbers for both users. In my example, member Dylan Healey, needs to be added to IT Adult's (15046721) account.
If they are unable to provide their member number you can search by the other fields, though it may be more difficult to find the user.
2. Search for the member who needs to add the other member. **Each user** should have **two** entries, an **Annual Pass** type and a **Puffing Billy Railway** type

If there are more than two entries because a member # was not used, you can use the **ParentCard** number under an **Annual Pass** type to match the **Member #** of the online account.



Card #	Parent Card	Name	Email	Phone#	DoB	Type	Issue Date	Expiry Date	# Bookings
15146136		Healey, Dylan	dylan.healey@pbc.org.au	+61 81412533935	19/07/1995	Puffing Billy Railway	14/01/2025		10
15123656		Healey, Dylan	d_healey1995@live.com		19/06/1995	Puffing Billy Railway	12/11/2024	12/11/2025	1
*15123658	15123656	Healey, Dylan	d_healey1995@live.com		19/06/1995	Annual Pass	12/11/2024	12/11/2025	

3. **Right click** the member that has a type of **Puffing Billy Railway** and select **Properties**



Card #	Parent Card	Name	Email	Phone#	DoB	Type	Issue Date	Expiry Date
15046721		Adult, IT	it@pbc.org.au	+61 97570700	19/07/1995	Puffing Billy Railway	13/05/2024	
*15046725	15046721	Adult, IT	it@pbc.org.au	+61 97570700	19/07/1995	Annual Pass	13/05/2024	13/05/2025

4. Go to **Associate Cards** and select **Add Family Member**

Membership Card - IT Adult (15046721)

Individual Contact Options

- Details
 - Card Details
 - Portal Details
 - Associate Cards**

Associated Cards

Name	Type	Balance	Expiry
Adult Family (IT)			
15046724	Puffing Billy Railway	\$0.00	
IT Adult			
15046721	Puffing Billy Railway	\$0.00	
15046725	Annual Pass	\$0.00	13 May 2025
IT Child			
15046722	Puffing Billy Railway	\$0.00	
15046726	Annual Pass	\$0.00	13 May 2025
IT Infant			
15046723	Puffing Billy Railway	\$0.00	
15046727	Annual Pass	\$0.00	13 May 2025

Add Family Member

Search

OK Cancel Apply

5. Search for the members number you need to add and click **OK**

Member Card Search

15123656 ☐ Include similar names

Card Details	Customer Details	Notes
Puffing Billy Railway #15123656 1 Bookings	Dylan Healey	

OK Cancel

6. If you go back to Associate Cards you will now see the member added to the account. **Hit Apply**

Membership Card - IT Adult (15046721)

Individual Contact Options

Details

Card Details

Portal Details

Associate Cards

Search

Associated Cards			
Name	Type	Balance	Expiry
Adult Family (IT)			
15046724	Puffing Billy Railway	\$0.00	
IT Adult			
15046721	Puffing Billy Railway	\$0.00	
15046725	Annual Pass	\$0.00	13 May 2025
IT Child			
15046722	Puffing Billy Railway	\$0.00	
15046726	Annual Pass	\$0.00	13 May 2025
IT Infant			
15046723	Puffing Billy Railway	\$0.00	
15046727	Annual Pass	\$0.00	13 May 2025
Dylan Healey			
15123656	Puffing Billy Railway	\$0.00	12 November 2025
15123658	Annual Pass	\$0.00	12 November 2025

Add Family Member

7. When the "parent" user IT Adult logs into the portal, they can now see the new member. If the customer is already logged in and cannot see it, get them to refresh the page.

DASHBOARD

NEW BOOKING

RENEW MEMBERSHIP

TRAVEL SEARCH

MY PROFILE

CHANGE PASSWORD

SIGN OUT

IT ADULT

IT Adult

Annual Pass

Membership # 15046721

Expiry 13 May 2025

Dylan Healey

Annual Pass

Membership # 15123656

Expiry 12 Nov 2025

IT Child

Annual Pass

Membership # 15046722

Expiry 13 May 2025

IT Infant

Annual Pass

Membership # 15046723

Expiry 13 May 2025

UPCOMING TRAVEL

Reference	Status	Date	Product	Party	Qty	Amount
No upcoming bookings						

Revision #1
Created 29 January 2025 05:25:20 by Dylan Healey
Updated 29 January 2025 05:42:16 by Dylan Healey