

Taking a Form on behalf of a User

What is it?

An administrator or ASA can take a form on behalf of another user – either someone who already has a profile in the database or a new user without a profile. This is useful in cases where an application or event registration form has been sent through the mail or discussed over the phone.

Previously, administrators had to assume the profile of the user or create a new profile in the case of new users. Then they had to complete the form as the user.

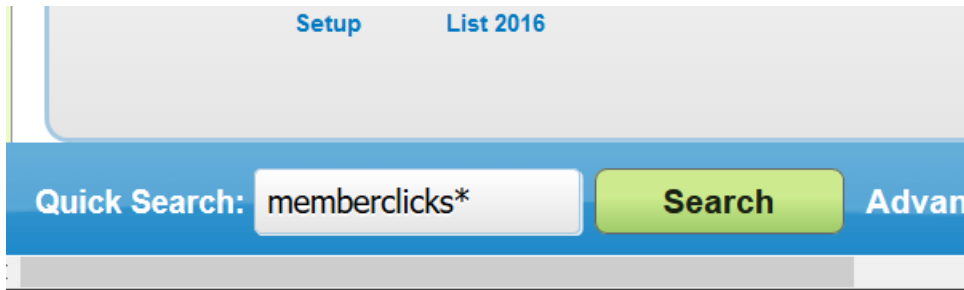
Now, admins can save time and accomplish this by clicking a button on the form list. By doing so, they can also prevent notifications from being sent to the user about the submission.

How To Access

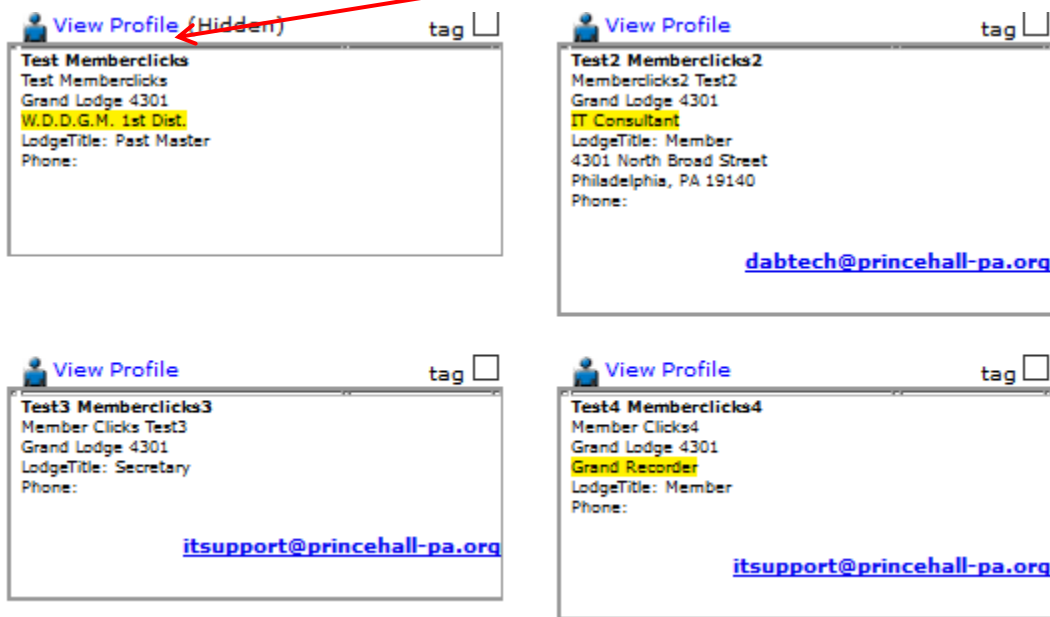
Navigate to Admin Home screen > Admin Home



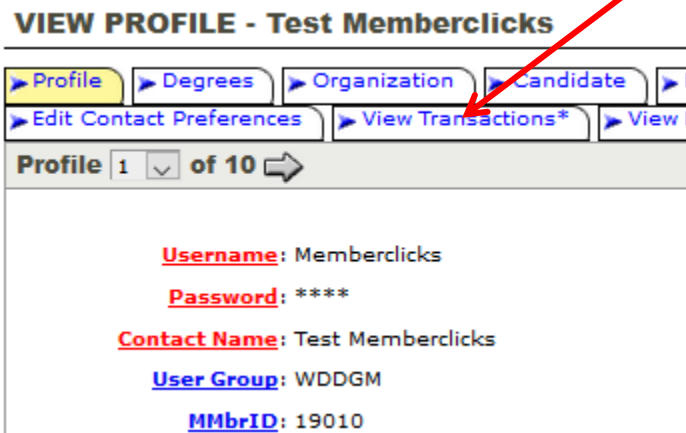
From the admin screen, type in name or member ID # or LName into the quick search box, click search button



From the search results screen, click on view profile that you want to submit on a user's behalf.



On the View profile screen click on view transactions link to view select dropdown



On the receipts screen go to Take form on behalf of user and click on 204 Mid-Year Session 2019

RECEIPTS - Test Memberclicks

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Form Receipts

Transaction details

	12333824Dues Payment	07/27/2017 15:31:45	No Payment
	11790036 Mid-Year Session 2017	02/10/2017 12:54:13	Send Check
	11514294 Add New Member	11/24/2016 11:15:27	No Payment
	10757143Dues Payment	04/28/2016 13:14:12	No Payment
	10757001Dues Payment	04/28/2016 12:53:31	No Payment
	10756402Status History	04/28/2016 11:30:10	No Payment

Take form on behalf of user
Select the name of a form below to submit the form using this profile.

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Click the add a submission link to continue the process