Member Types

2017 - Spring Edition
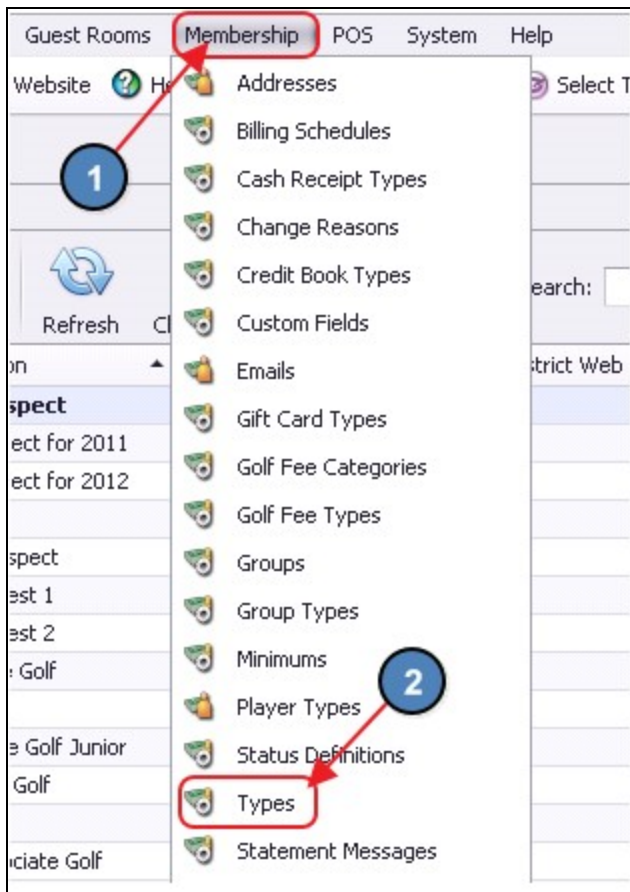
User Guide - Table of Contents

Overview

Member Types are used as a solution to classify members for reporting, billing, and marketing purposes on a club by club basis. The Office system allows the user to create an unlimited amount of Member Types depending on the clubs operations.
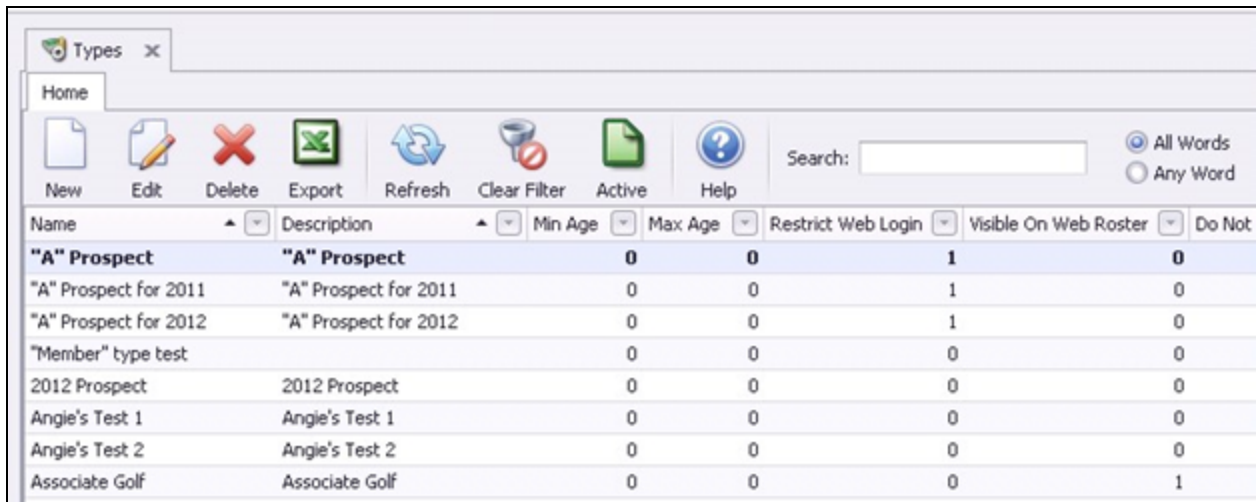
Use Case(s)

A Club's Member types could include the following: Corporate Golf Junior, Associate Golf, Honorary, Intermediate, Social, Tennis, Senior, and Resigned types. Additionally, Clubs usually set up an additional Member type for either the primary Member's spouse or dependent where appropriate (ie - Social-Sp, Social-Dep) to ensure billing is processed appropriately.

Accessing the Tool

To access **Member Types**, select **Membership** across the top toolbar, and choose **Types**.
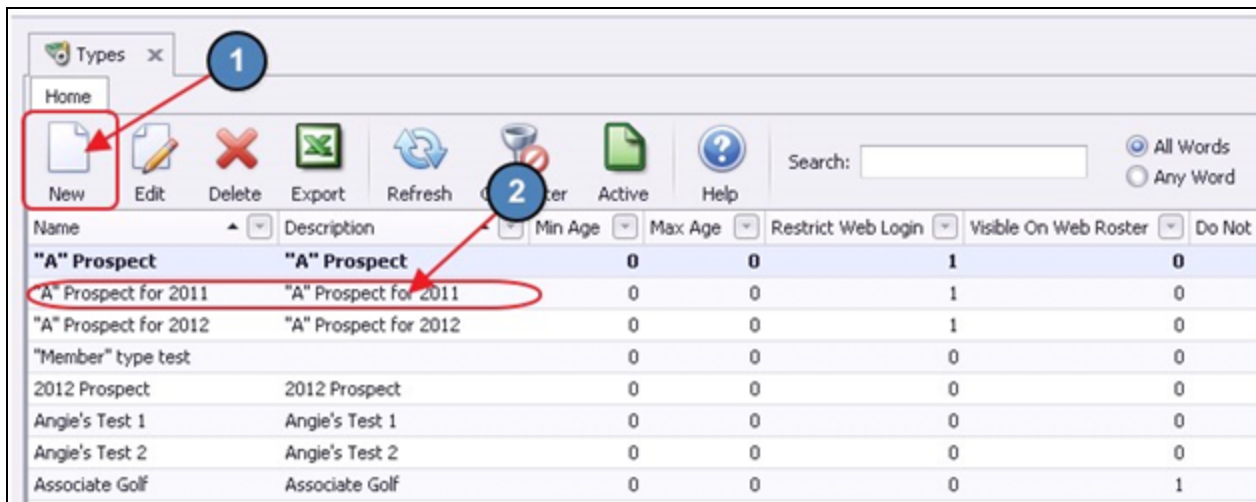
The **Member Type Grid** will launch.

The primary functions associated with managing Member Types are embedded in the Member Type setup screen, which can be accessed by double-clicking on an existing Type, or clicking the **New** button.

Member Type Setup - Tab Overview

In this section will be review the various tabs within a Member Type.

General Information

1) Enter a **Name** and **Description** (Optional) for the new Member Type.

2) Specify if the Member Type should have **Minimum Age**, **Maximum Age**, or both.

3) **Reciprocal Club** - If checked, the user will be required to enter reciprocity information at the POS when any member within the Member Type is selected.

4) **Tax Exempt** - If checked, members within the Member Type will be exempt from tax on all transactions completed at the club.

5) **Is Spouse** - If checked and the member is a dependent of another member, members within the Member Type will automatically populate into the Spouse Field on the Primary Member's account. Please see our Membership Management manual for more information on the Spouse Field.

6) **Event Class** - Specify if the Member Type will be considered Member or Non-Member Revenue.

7) **Company** - Select the applicable Company to be attached to the Member Type.

Note: With the new multi-company capabilities, to see any **Members** or **Member Types** associated with a specific Company, the employee must have rights to a **Department** linked to that **Company**.
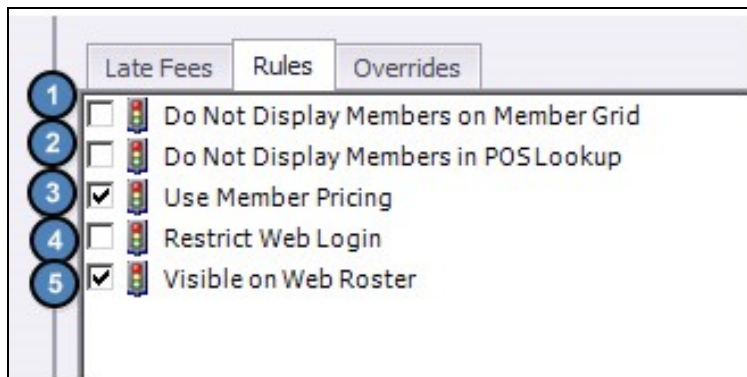
Late Fees

Select the applicable **Late Fees** on this tab. For more information on **Late Fees**, please see our **Late Fees** guide.
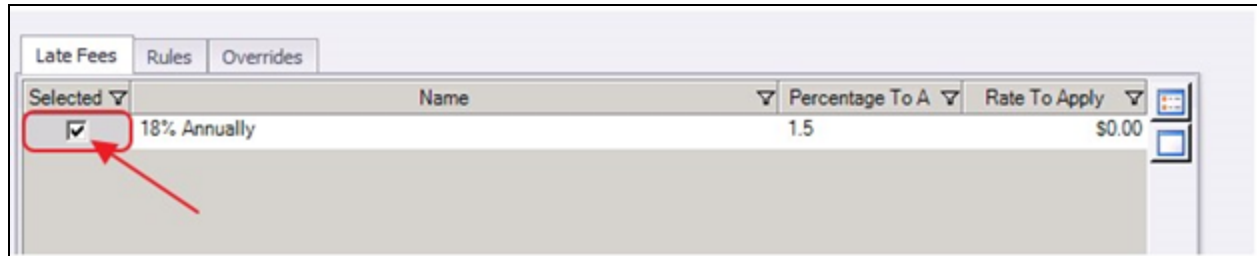

Rules

The **Rules** tab allows the user to apply certain rules specific to the Member Type. Please see below for a description of each rule:

1) **Do Not Display Members on Member Grid** - If checked, members within the Member Type will not display on the **Manage Members Grid**.

   Note: If **Do Not Display Members on Member Grid** is checked and the user needs to edit a member within the Member Type, simply select the **Active** button on the **Manage Members Grid** and hidden members will be highlighted in yellow. Double click on the yellow highlighted member and edit as normal.
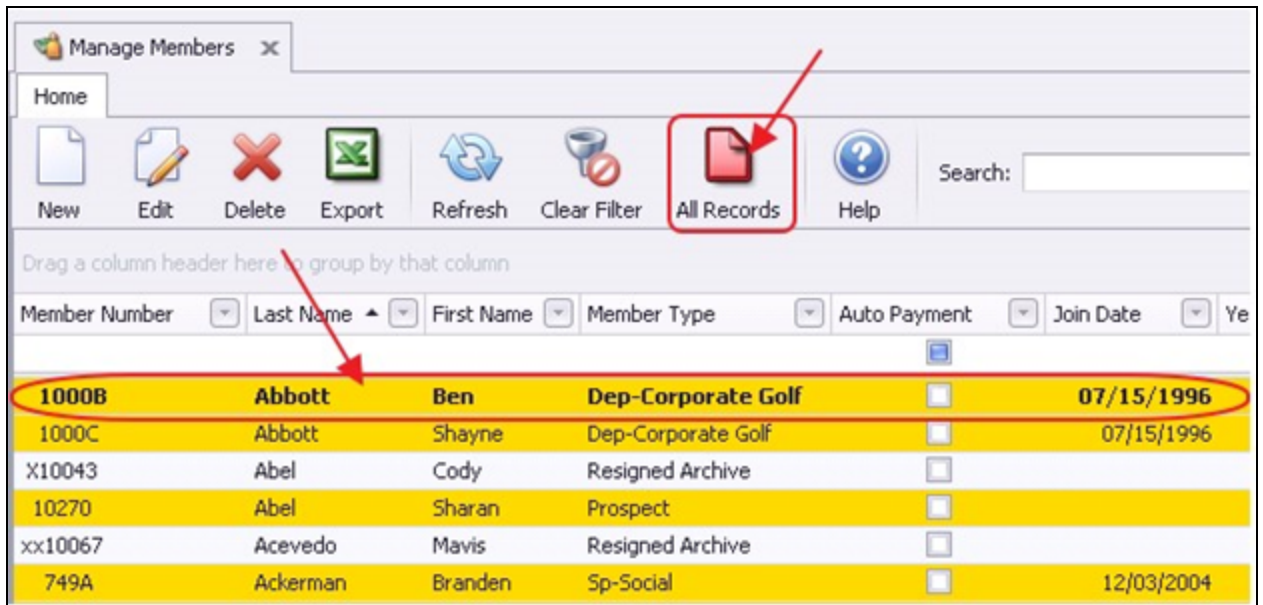
2) **Do Not Display Members in POS Lookup** - If checked, members within the Member Type will not display in the POS.

3) **Use Member Pricing** - If the club distinguishes between Member and Retail pricing, check this box and members within the Member Type will receive the Member price rather than the Retail Price.

   Note: Be sure to specify at the Item level the Retail and Member Price if applicable.
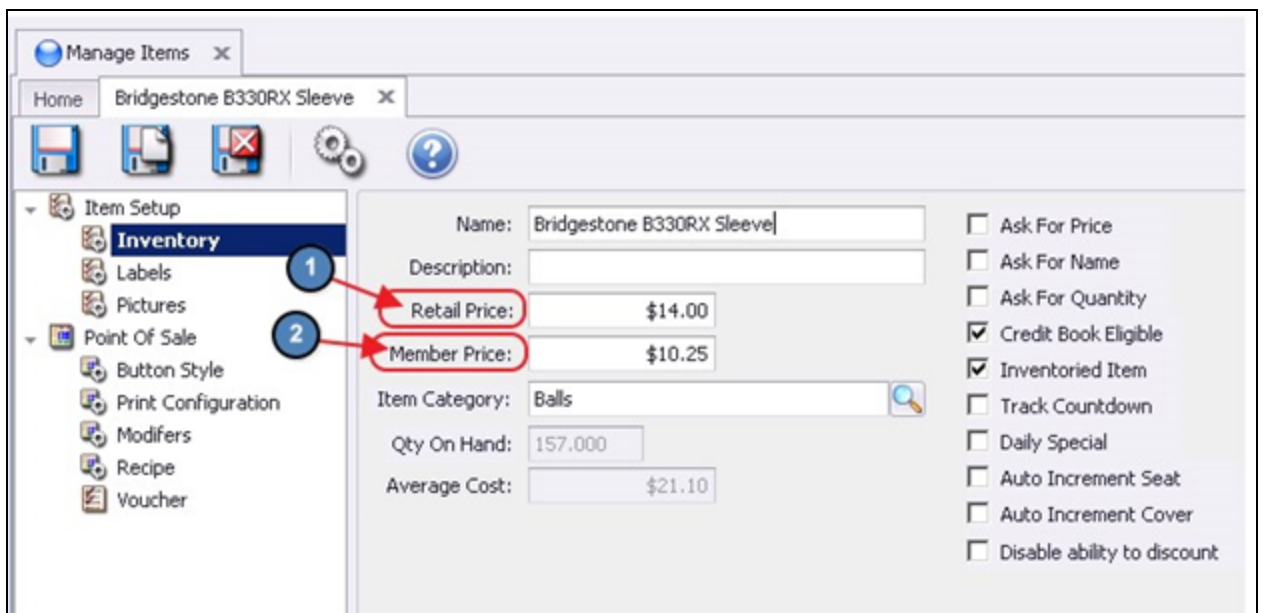
4) **Restrict Web Login** - Only applicable to Axis and CSWeb clients. If checked, members within the Member Type will not be able to login to the website.

5) **Visible on Web Roster** - Only applicable to Axis and CSWeb clients. This box **MUST** be checked for members within the Member Type to be visible on the website roster.

Overrides

This tab is ONLY applicable to CSWeb clients. Links and Axis clients please ignore this tab. If web payments coming from CSWeb should default to a different Cash Receipt Type for ACH and Credit Card payments, please specify them on this tab. This Override will only apply to members within the Member Type.
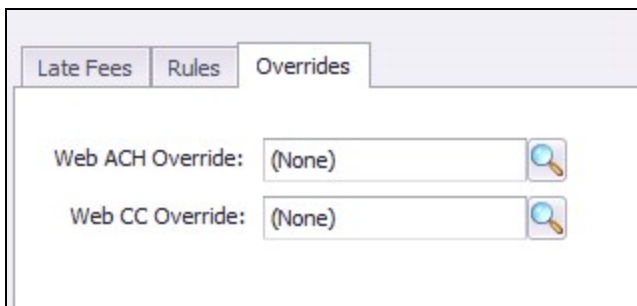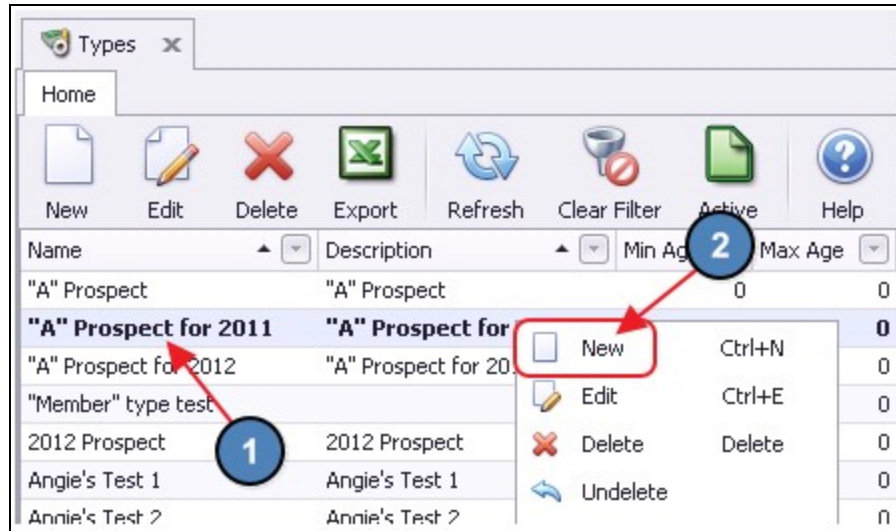

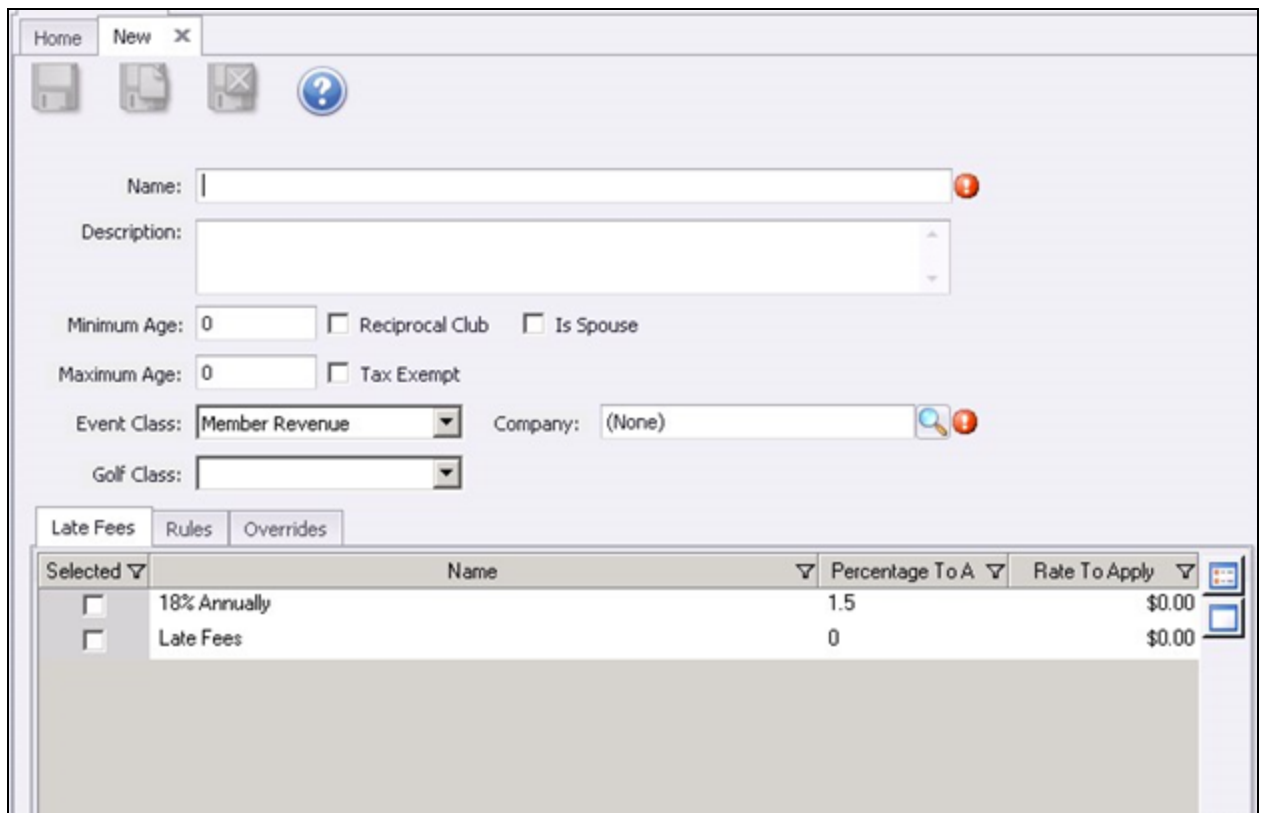# Creating a New Member Type

To create a new Member Type,

1) Navigate to the **Member Types Grid** and perform either of the following to launch the Member Type setup screen:

   a) Click the **New** icon on the toolbar.
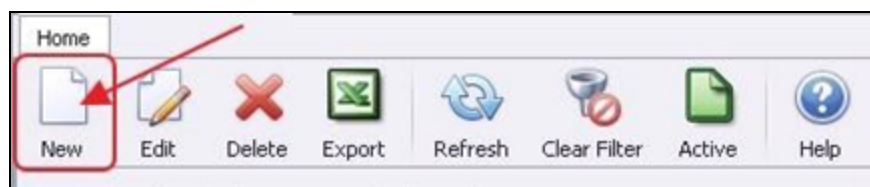
   b) Right-click anywhere on the Member Types Grid and select **New**.

2) The Member Type setup screen will launch.

3) Complete the **General Information,** and then navigate to each of the below tabs and enter all relevant information. It is recommended to enter information on these tabs in **sequential** order. Please see the **Tab Overview** section of this document for further instructions on each tab.

- **General Information**
- **Late Fees**
- **Rules**
- **Overrides (If Applicable)**

4) Lastly, click **Save & Close** to complete the setup of the new Member Type.
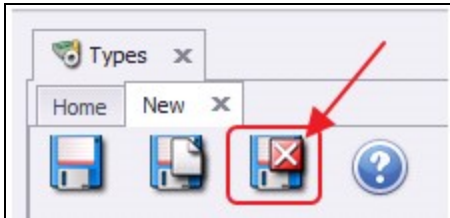
Best Practices

- Set up consistent Member Type naming conventions. For instance, if you club is setting up Spouse and Dependent Member types, always designate them consistently (ie - Member Type - **Sp**, vs., Member Type 1-**Spouse**, Member Type 2-**Sp**, Member Type 3 - **SPS**, and Member Type - **Dep**, vs.. Member Type 1-**Depend**, Member Type 2-**Dep**, Member Type 3-**Dependent**).

- If Members are part of a Member Type that is subject to Late Fees, but they are exempt, ensure to flag the Member as late fee exempt in the Member's Profile, Financial Information tab.

Frequently Asked Questions

Can Members be part of more than one Member Type?

A Member can be assigned to only one Member Type. A Member can, however, belong to Multiple Member Groups, so if your Club is setting up a Type to accomplish something that would better be accomplished through a Group, consider setting up a Member Group instead of an additional Member Type.