CLUBESSENTIAL

Opening the Club Guide

November 20, 2020 1pm EST

Your webinar hosts for today…. Justin Brown & Kim Saunders

Ask a Question at Any Time!

Questions will be addressed at the end of the webinar.

Please visit our Client Knowledge Base at

kb.clubessential.com

Please note: This webinar is being recorded. The recording will be sent out after the webinar.

Agenda

Accounting

- Credit Book Review
- Rentals
- Member Billing-Billing Schedules, installment billing, minimums
  - Minimums-changes, apply to new member types (Clear out custom minimums)
- Reporting
  - Trial Balance, Aged Out invoices for Vendors

Managing The Member Grid

- Customize Grids
- Multi-edit Tool
- Scheduled Task
- Member Type/Status Rules

Unification Review

- Unification Settings
  - Review Member Types/Status
  - Group Sync/ Group Management

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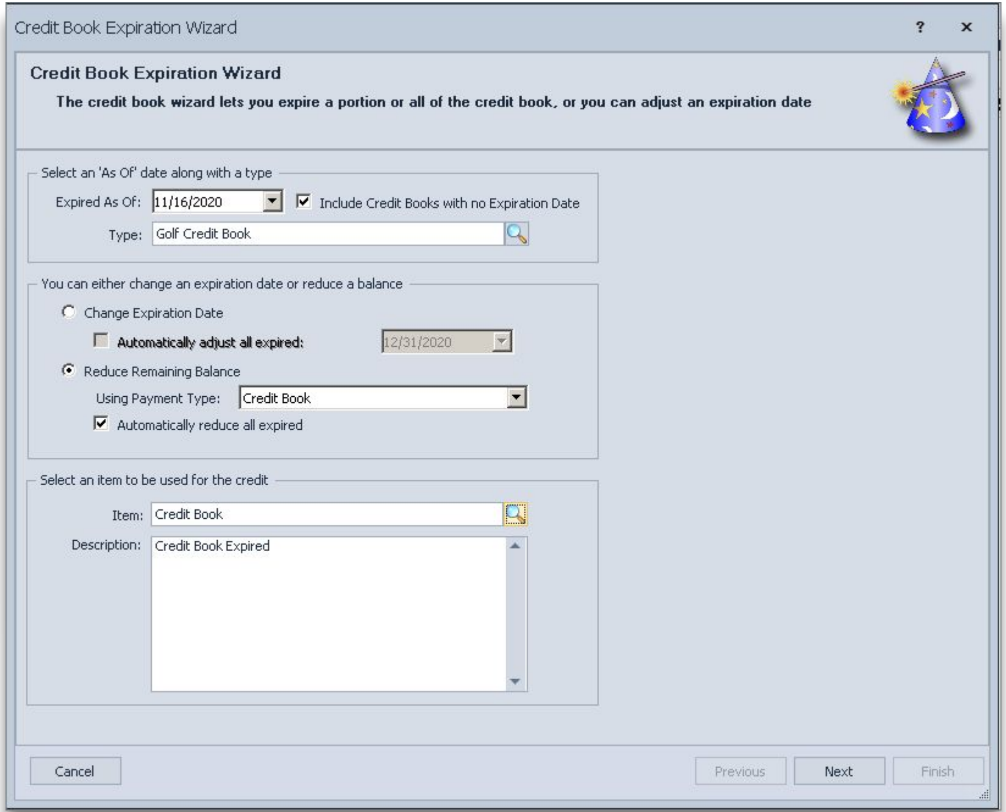
Billing and Reports

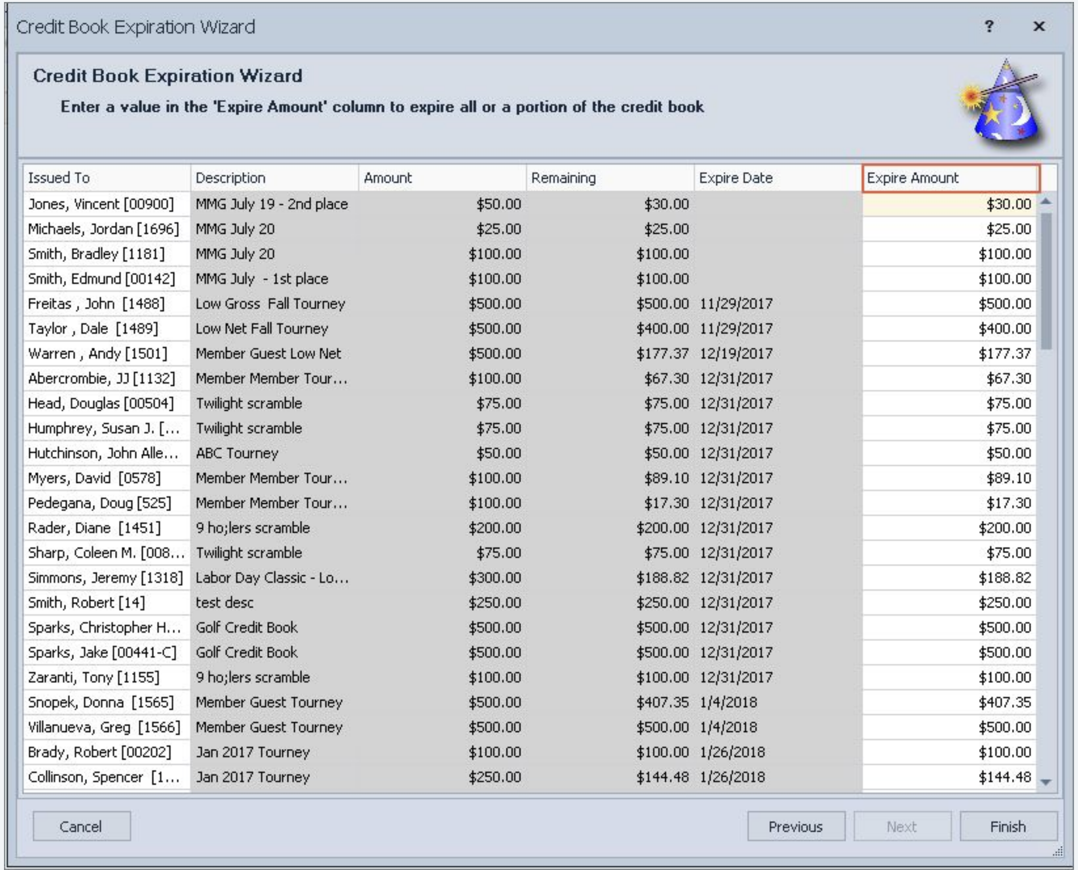
Credit Book Expiration Wizard



Credit Book Expiration Wizard

If **Automatically reduce all expired** was chosen on the previous step, the **Expire Amount** column auto-fills.

Otherwise, make adjustments to this column as needed.

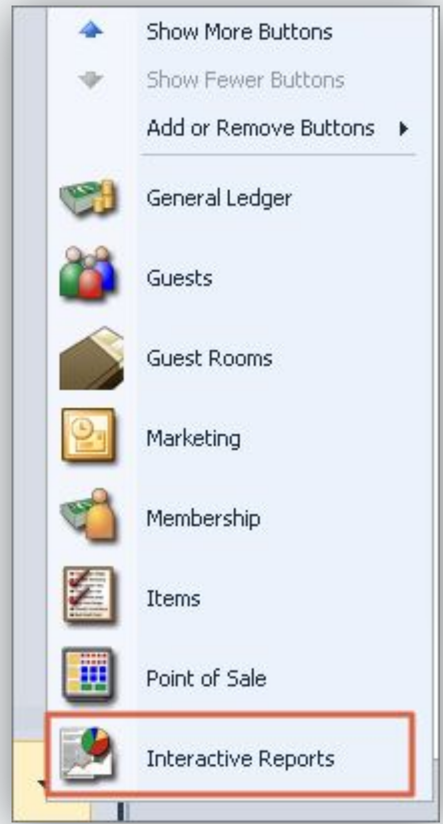


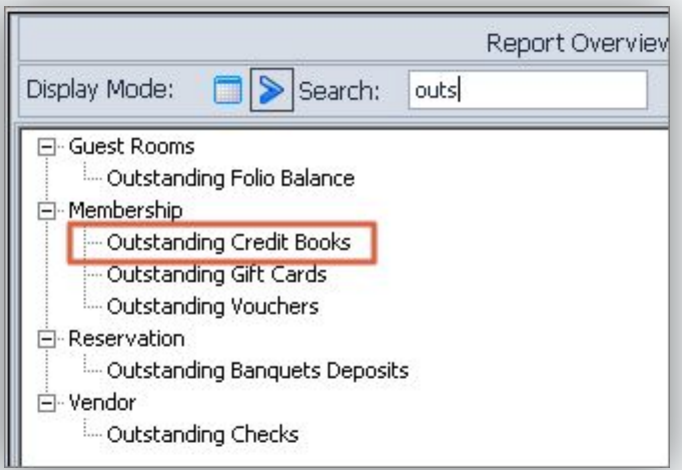
Issued To	Description	Amount	Remaining	Expire Date	Expire Amount
Jones, Vincent [00900]	MMG July 19 - 2nd place	$50.00	$30.00		$30.00
Michaels, Jordan [1696]	MMG July 20	$25.00	$25.00		$25.00
Smith, Bradley [1181]	MMG July 20	$100.00	$100.00		$100.00
Smith, Edmund [00142]	MMG July - 1st place	$100.00	$100.00		$100.00
Freitas , John [1488]	Low Gross Fall Tourney	$500.00	$500.00	11/29/2017	$500.00
Taylor , Dale [1489]	Low Net Fall Tourney	$500.00	$400.00	11/29/2017	$400.00
Warren , Andy [1501]	Member Guest Low Net	$500.00	$177.37	12/19/2017	$177.37
Abercrombie, JJ [1132]	Member Member Tour...	$100.00	$67.30	12/31/2017	$67.30
Head, Douglas [00504]	Twilight scramble	$75.00	$75.00	12/31/2017	$75.00
Humphrey, Susan J. [...	Twilight scramble	$75.00	$75.00	12/31/2017	$75.00
Hutchinson, John Alle...	ABC Tourney	$50.00	$50.00	12/31/2017	$50.00
Myers, David [0578]	Member Member Tour...	$100.00	$89.10	12/31/2017	$89.10
Pedegana, Doug [525]	Member Member Tour...	$100.00	$17.30	12/31/2017	$17.30
Rader, Diane [1451]	9 ho;lers scramble	$200.00	$200.00	12/31/2017	$200.00
Sharp, Coleen M. [008...	Twilight scramble	$75.00	$75.00	12/31/2017	$75.00
Simmons, Jeremy [1318]	Labor Day Classic - Lo...	$300.00	$188.82	12/31/2017	$188.82
Smith, Robert [14]	test desc	$250.00	$250.00	12/31/2017	$250.00
Sparks, Christopher H...	Golf Credit Book	$500.00	$500.00	12/31/2017	$500.00
Sparks, Jake [00441-C]	Golf Credit Book	$500.00	$500.00	12/31/2017	$500.00
Zaranti, Tony [1155]	9 ho;lers scramble	$100.00	$100.00	12/31/2017	$100.00
Snopek, Donna [1565]	Member Guest Tourney	$500.00	$407.35	1/4/2018	$407.35
Villanueva, Greg [1566]	Member Guest Tourney	$500.00	$500.00	1/4/2018	$500.00
Brady, Robert [00202]	Jan 2017 Tourney	$100.00	$100.00	1/26/2018	$100.00
Collinson, Spencer [1...	Jan 2017 Tourney	$250.00	$144.48	1/26/2018	$144.48

Outstanding Credit Book Report

Navigate to the **Interactive Reports** module.

Select the **Outstanding Credit Books** report under the Membership report list.





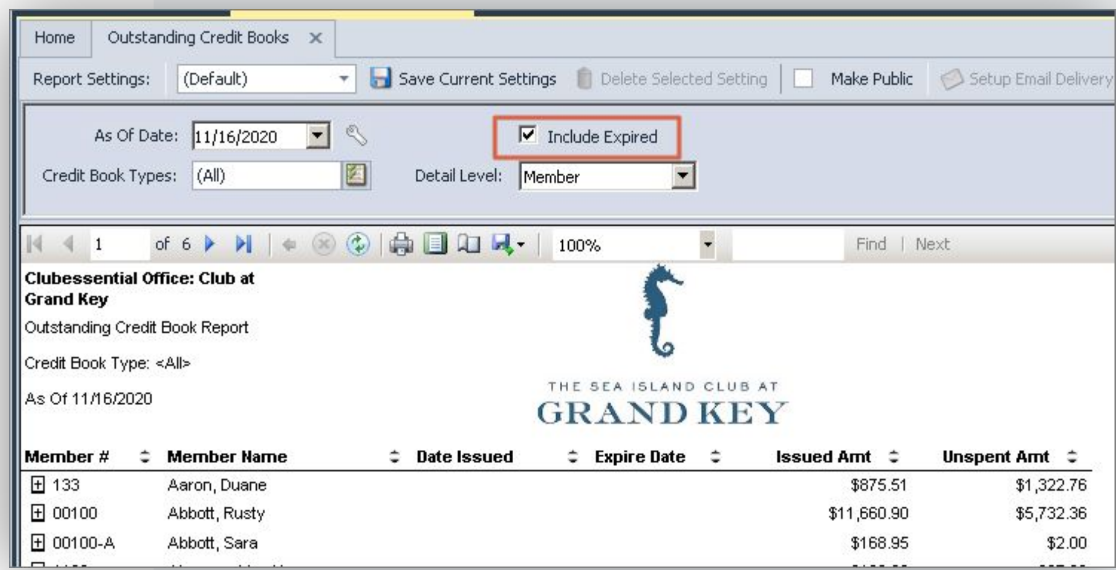
Outstanding Credit Books

As Of Date should match what was used in the Expiration Wizard.

Include Expired will pull all books with a balance.

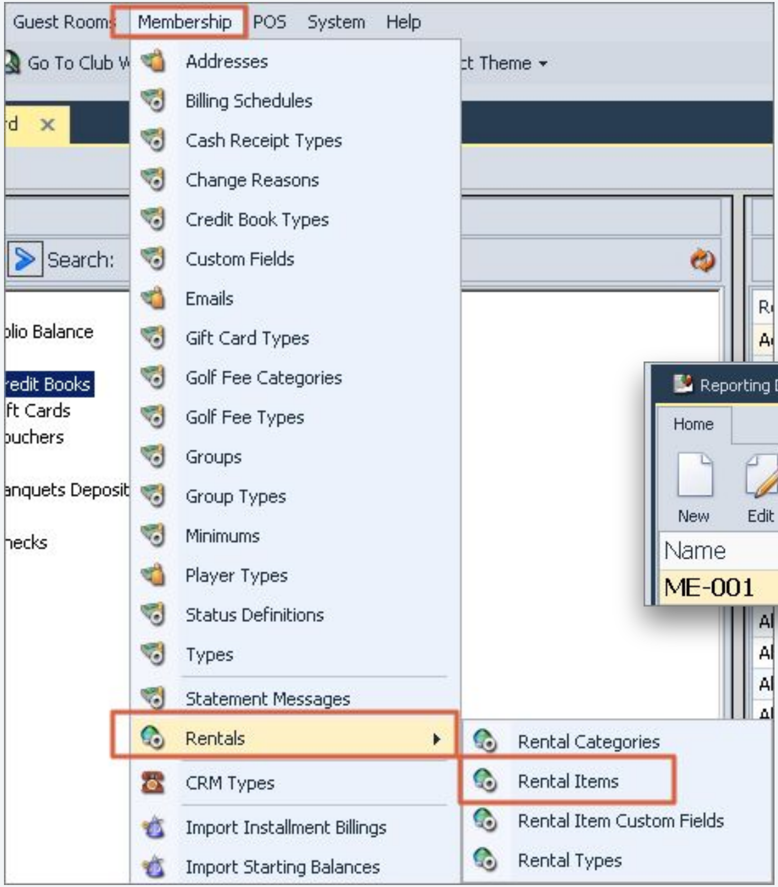
The report includes issued and unspent amounts.

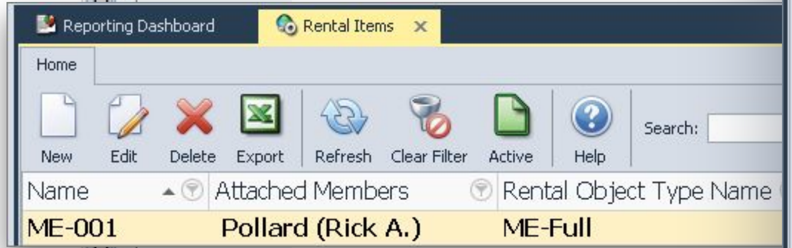
Expire date will help to pick a date in the wizard.

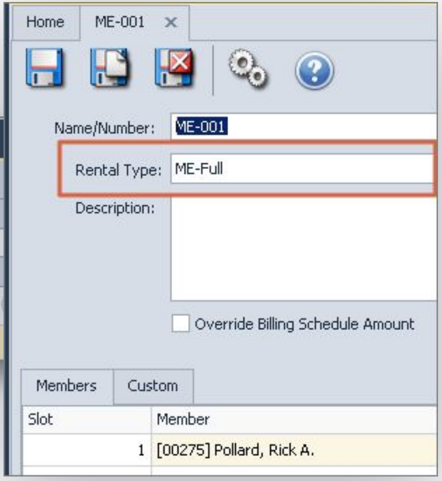


Rentals

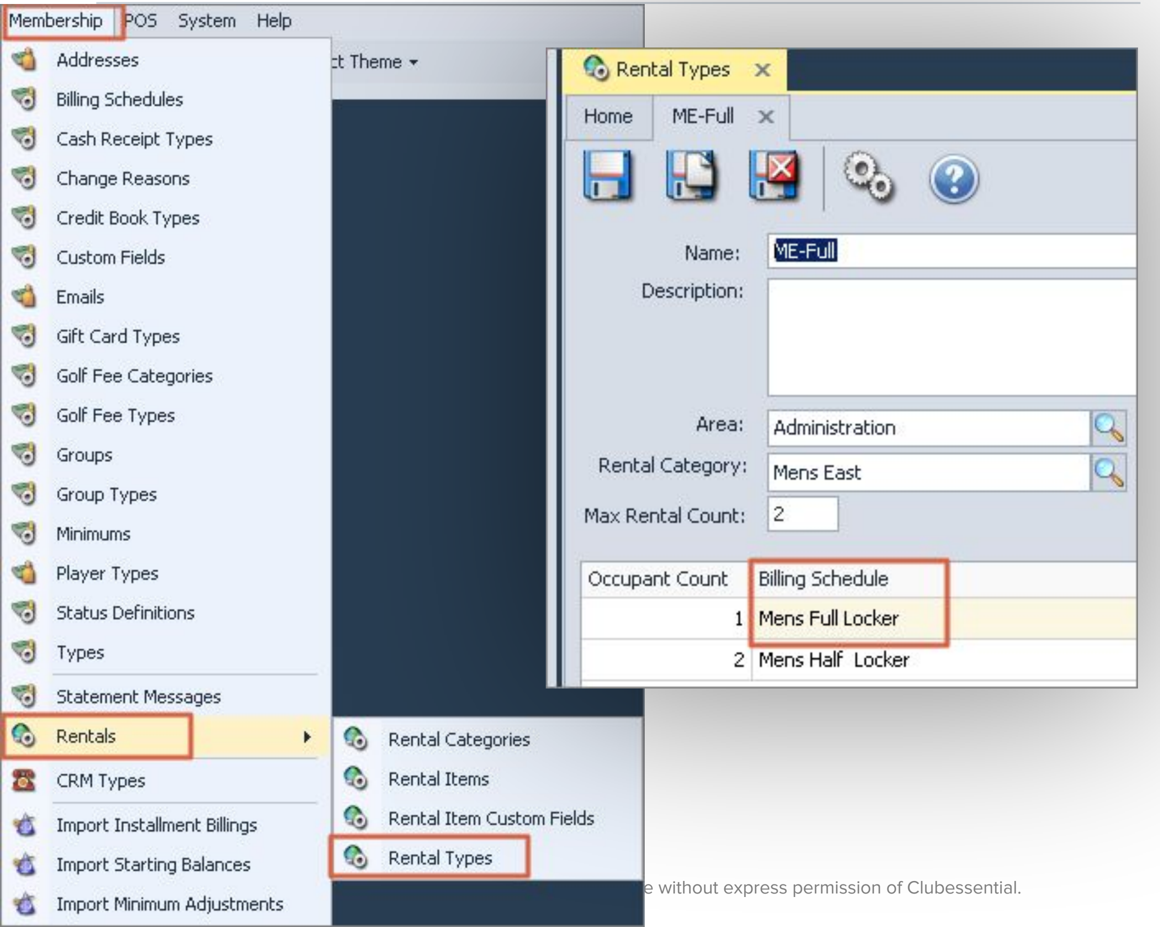
Rentals include lockers, boat storage, bag storage, lawn care etc.







Rental Type



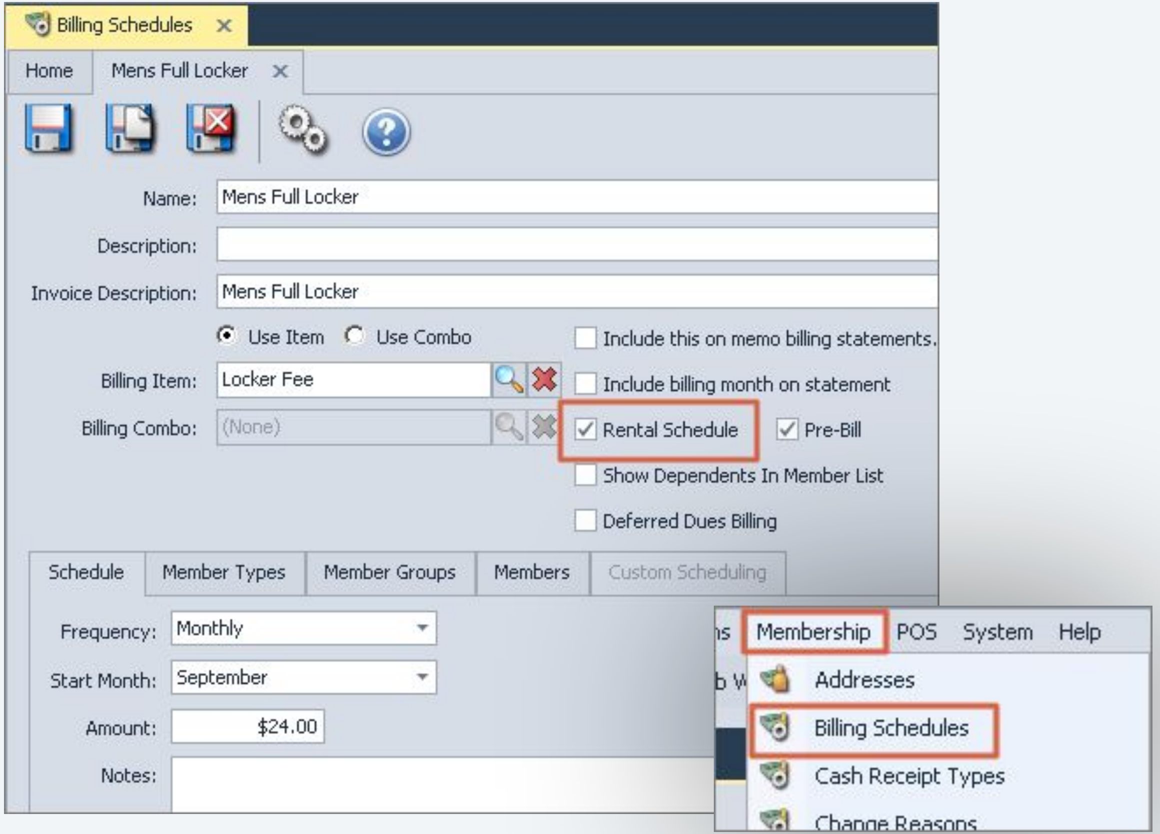
Rental Items are connected to Billing Schedules based on their **Rental Type**.

Types can have any number of schedules assigned as seen here.

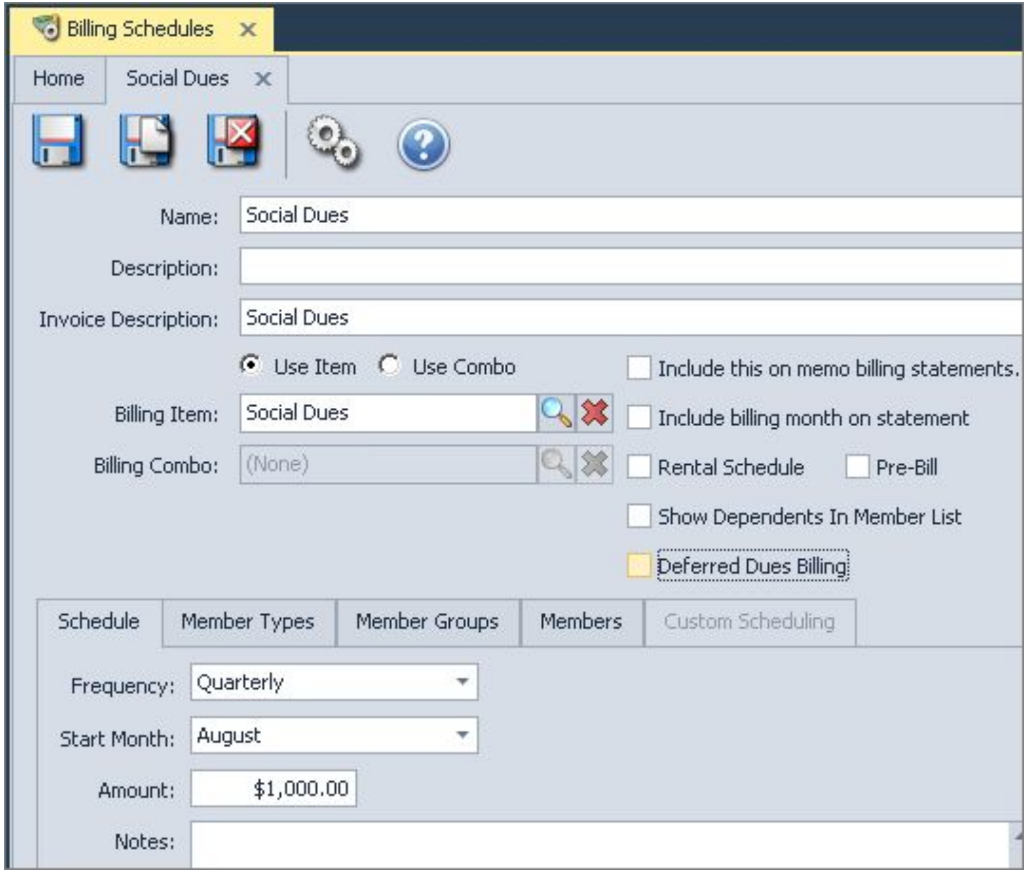
Billing Schedules For Rentals

Billing Schedules connected to rentals must have the **Rental Schedule** option checked.

*Member Type, Member Group, and Members tab do not interact with a rental.



Billing Schedules



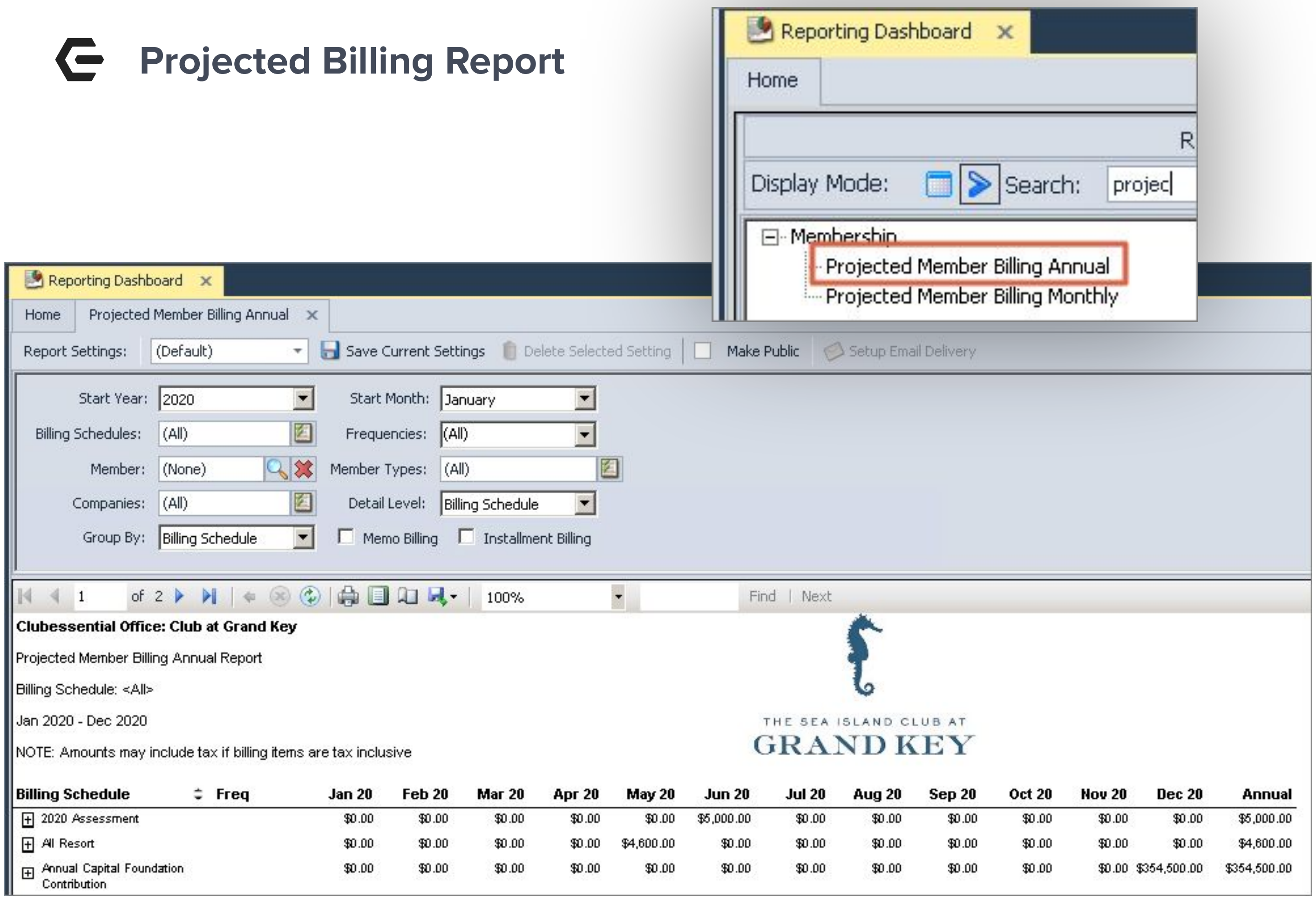
Three ways to connect to a Billing Schedule to a member:

- Type
- Group
- Individual

Member Types and Dynamic Groups will auto update.

Members and Static Groups will need to be manually adjusted.

Projected Billing Report

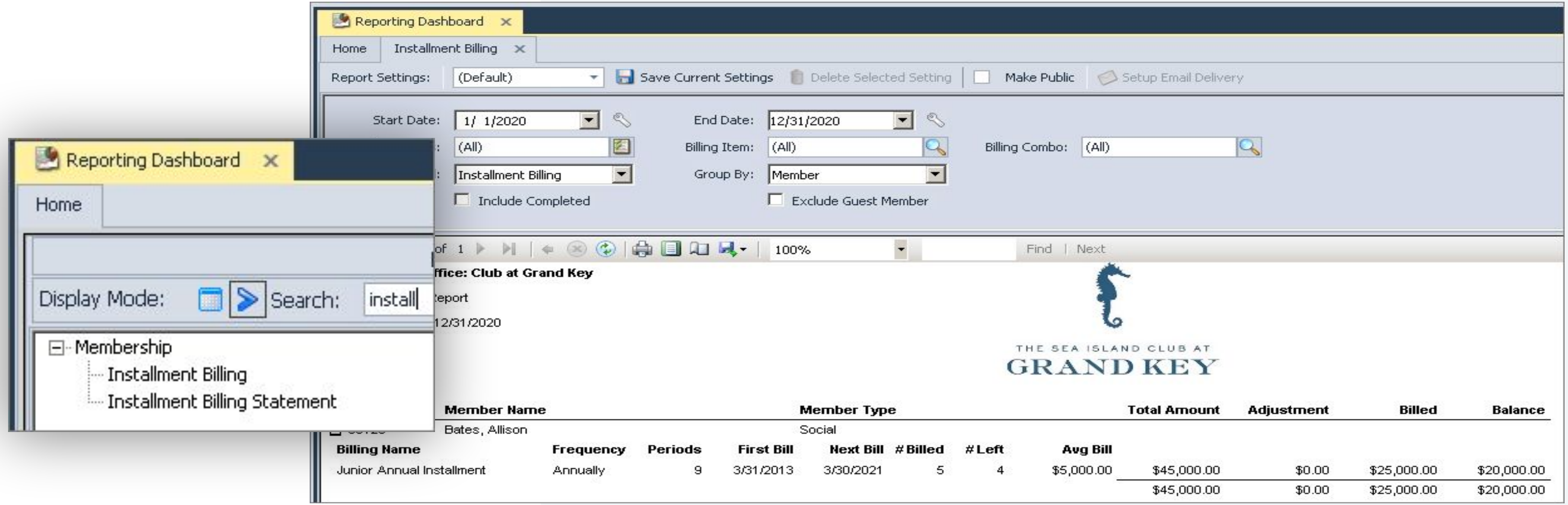


The Projected Billing Report shows all members that are connected to billing schedules.

This can be narrowed down to a specific schedule or member.

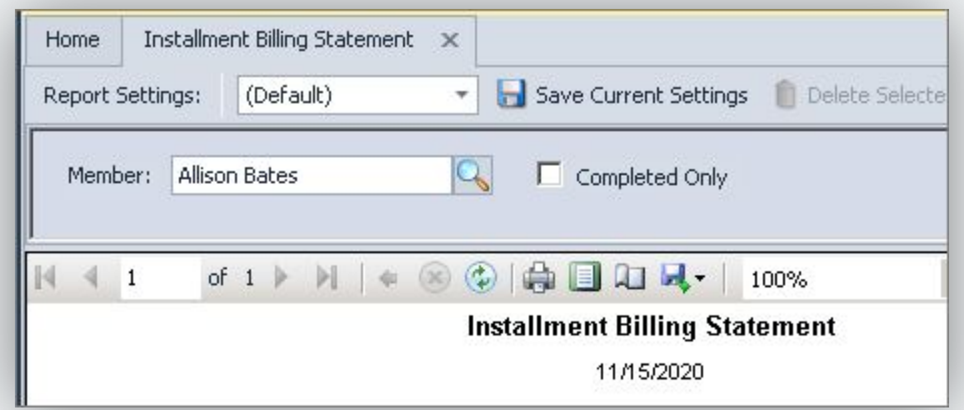
Installment Billing Report

The Installment Billing report details all installments.



Installment Billing Statement

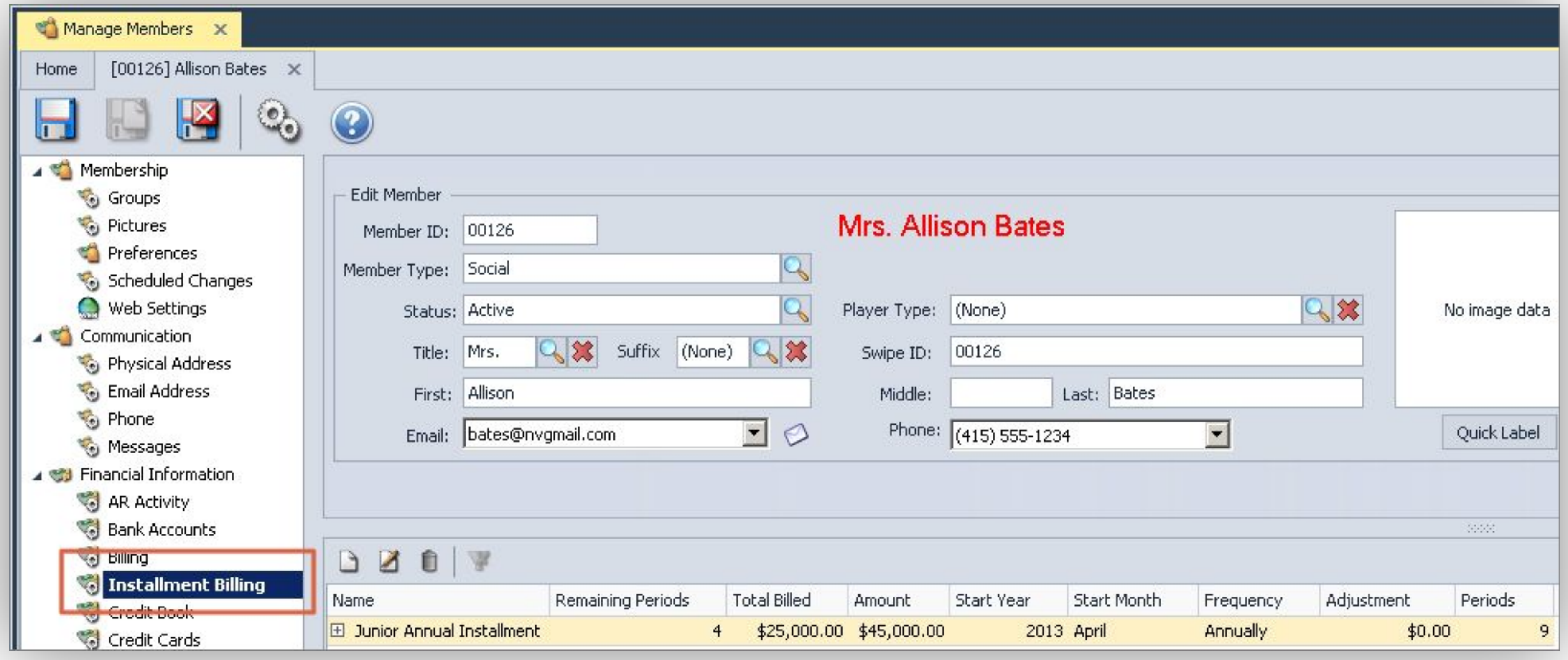
Installment Billing Statement details individual members with their original details.



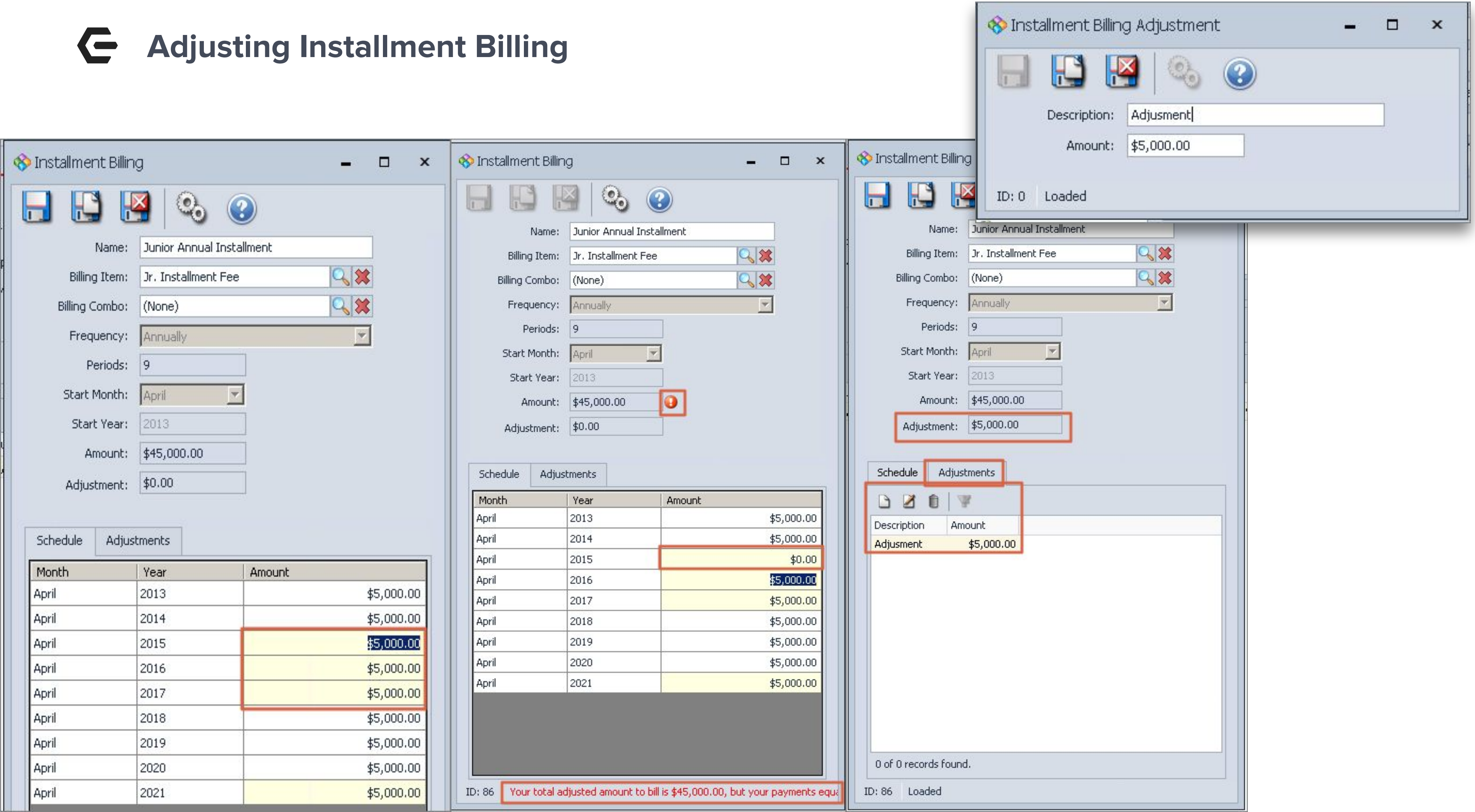
Member Name: Mrs. Allison Bates
Member Number: 00126
Joined Date: 3/28/2012

Billing Name	Billing Date	Item Code	Periods	Amount
Junior Annual Installment	4/30/2013	Jr. Installment Fee	9	$45,000.00
			Total:	**$45,000.00**

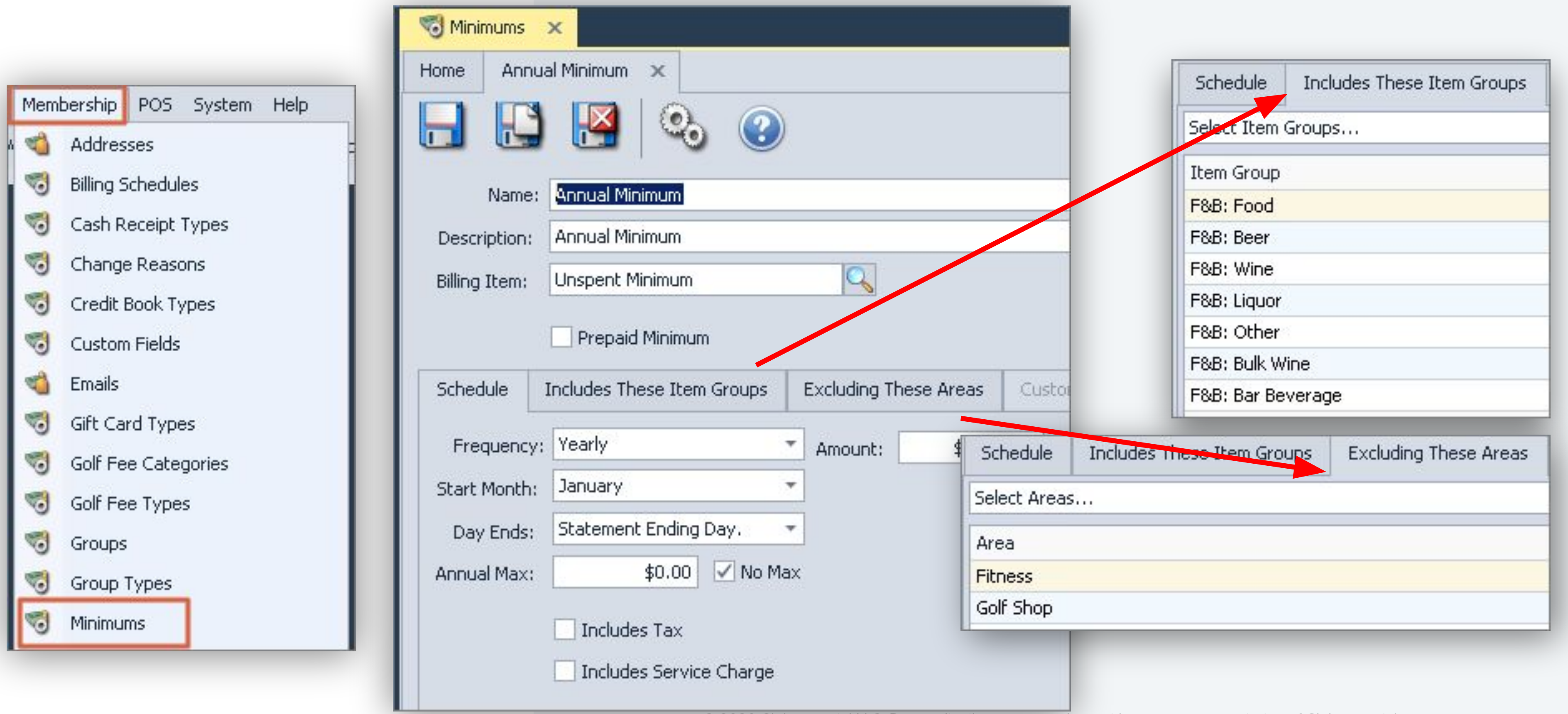
Adjusting Installment Billings



Adjusting Installment Billing



Minimums

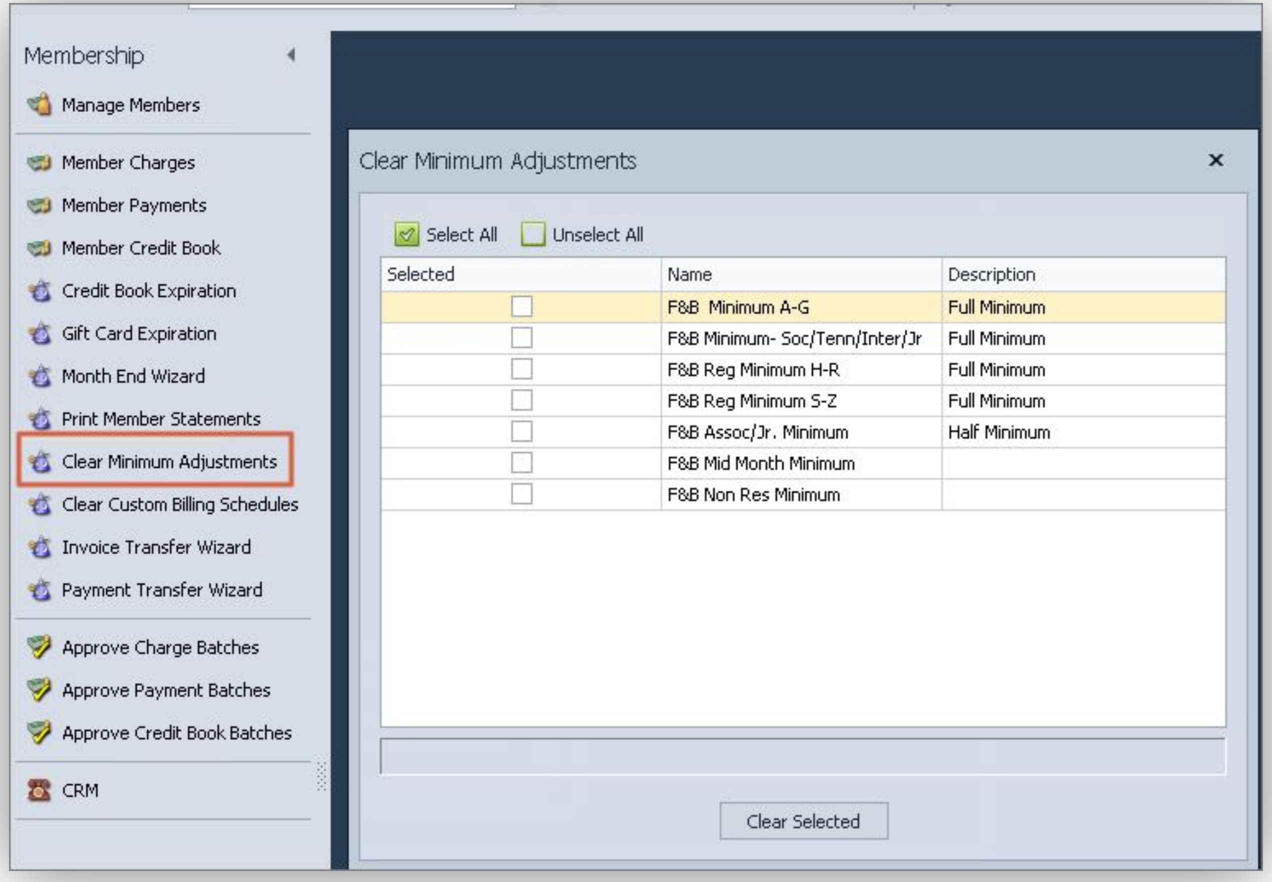


Membership
POS
System
Help
Addresses
Billing Schedules
Cash Receipt Types
Change Reasons
Credit Book Types
Custom Fields
Emails
Gift Card Types
Golf Fee Categories
Golf Fee Types
Groups
Group Types
Minimums
Minimums
Home
Annual Minimum
Name: Annual Minimum
Description: Annual Minimum
Billing Item: Unspent Minimum
Prepaid Minimum
Schedule
Includes These Item Groups
Excluding These Areas
Frequency: Yearly
Amount:
Start Month: January
Day Ends: Statement Ending Day.
Annual Max: $0.00
No Max
Includes Tax
Includes Service Charge
Schedule
Includes These Item Groups
Select Item Groups...
Item Group
F&B: Food
F&B: Beer
F&B: Wine
F&B: Liquor
F&B: Other
F&B: Bulk Wine
F&B: Bar Beverage
Schedule
Includes These Item Groups
Excluding These Areas
Select Areas...
Area
Fitness
Golf Shop

Clearing Minimum Adjustments

Minimum Adjustments carry over from one cycle to another.

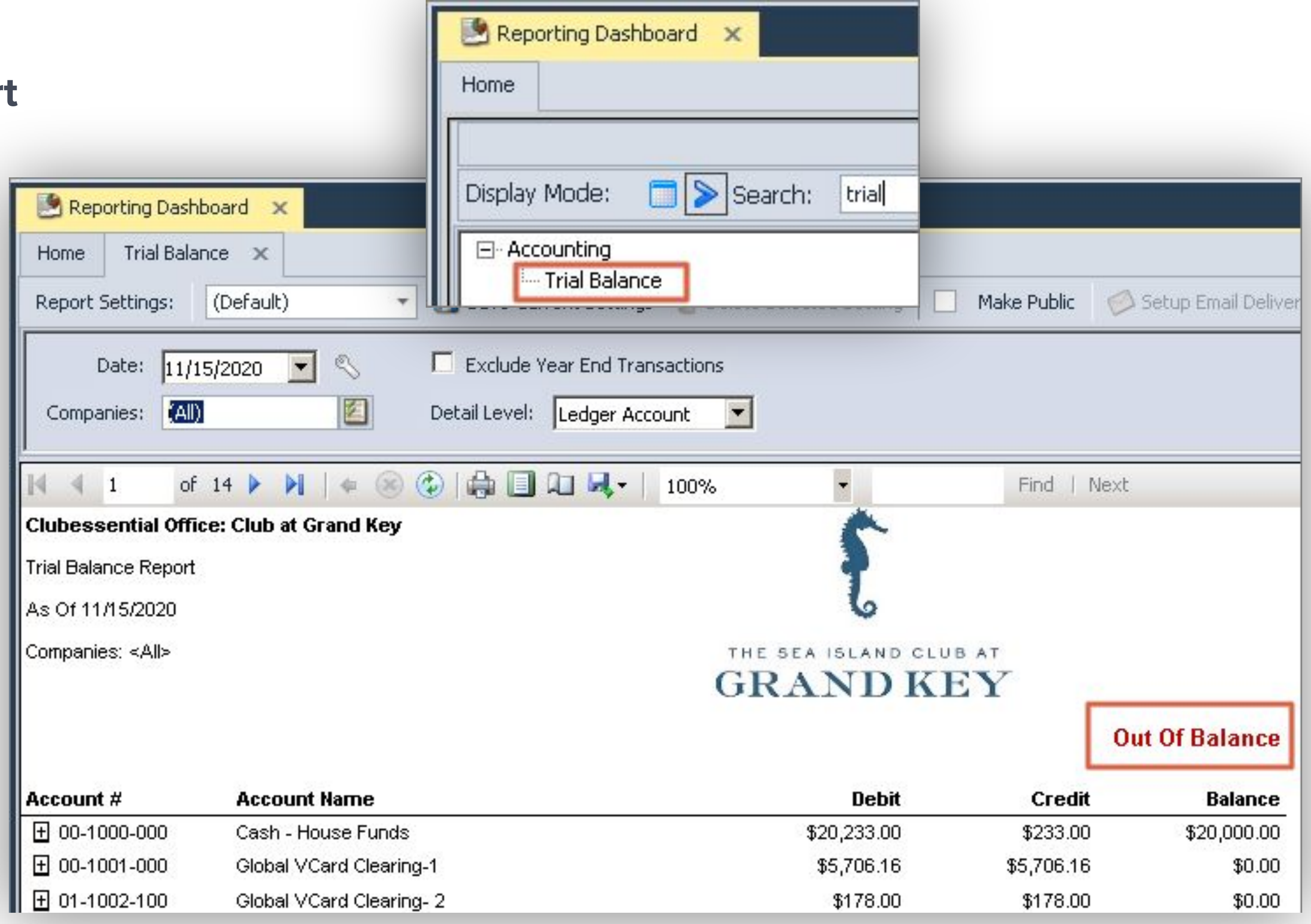
There is an option to either clear member by member or utilize the **Clear Adjustments Wizard.**



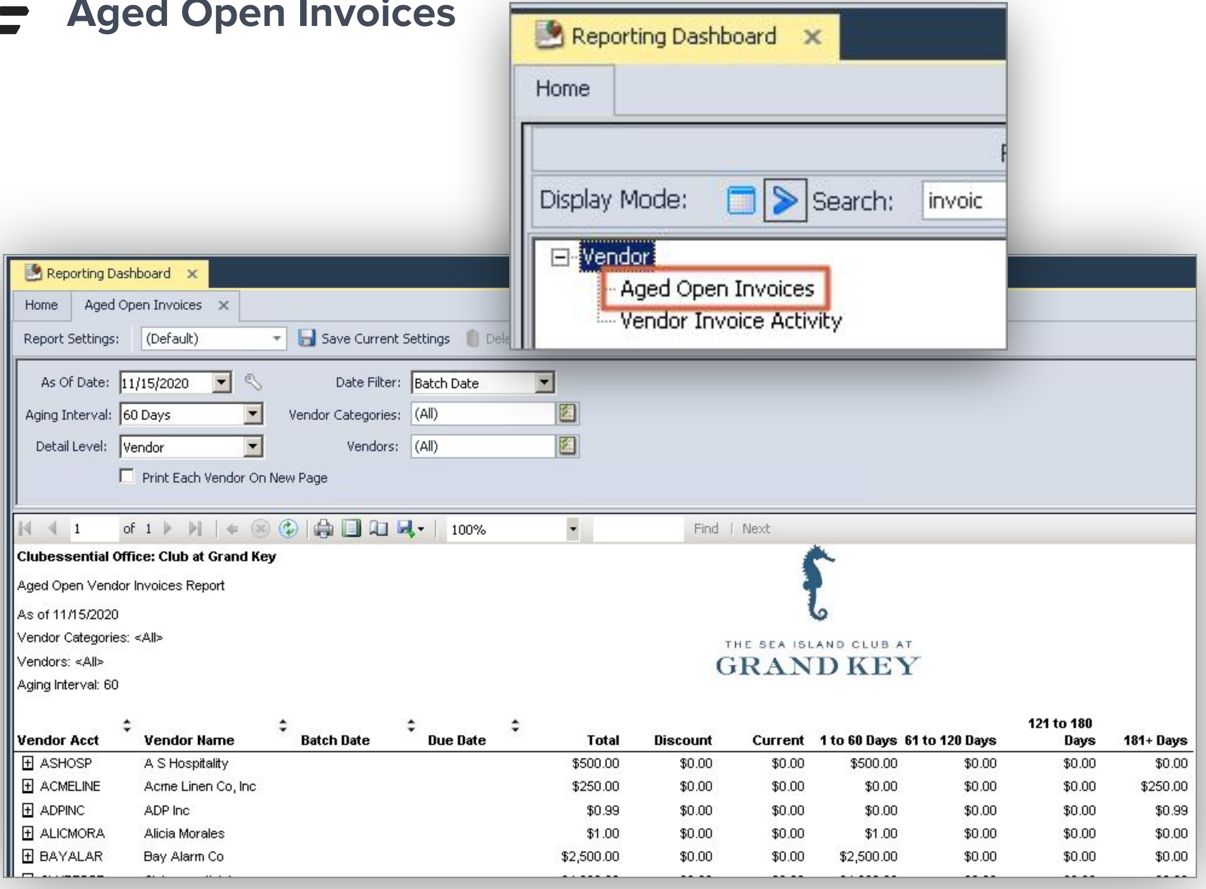
Trial Balance Report

The Trial Balance report will indicate if there is an Out of Balance and will show this message in bold, red letters.

The Out of Balance total will show at the end.



Aged Open Invoices



Aged Open Invoices report details any unpaid invoices within a time frame.

Useful at the beginning of a season to determine if anything is outstanding.

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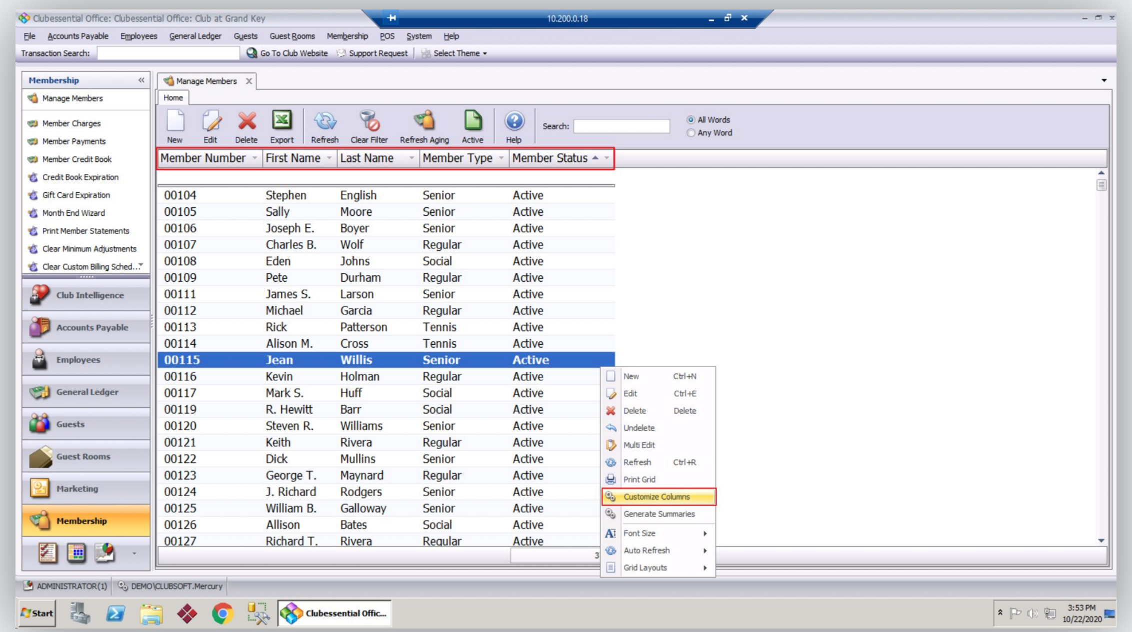
Membership-Data Management

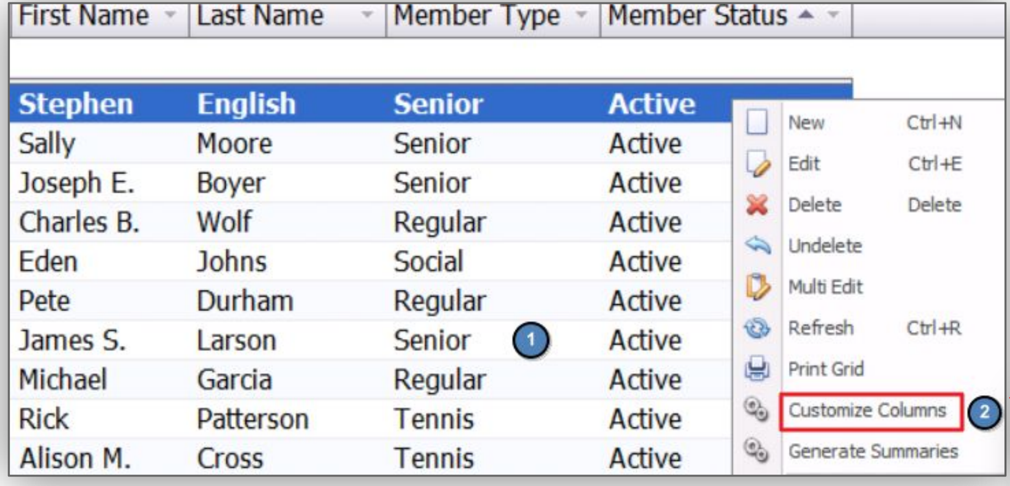
Custom Columns and Grids

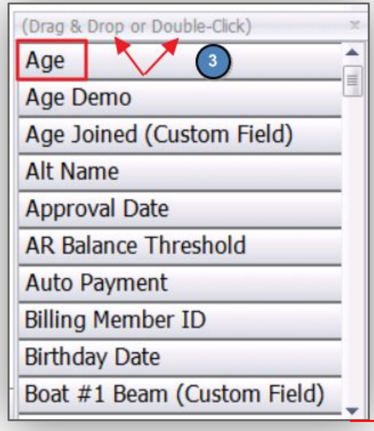
Did you know that throughout the CMA product, you can **Customize Columns** to organize data to fit your needs?

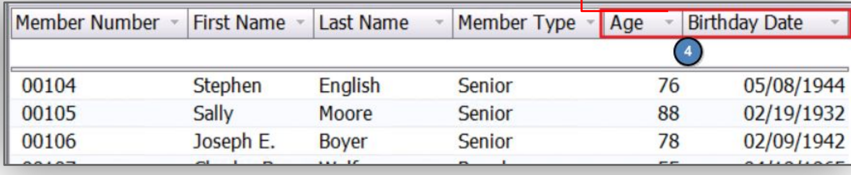
This allows for control of WHAT data is visible and the ORDER in which it's presented.



How to Customize Column Headers







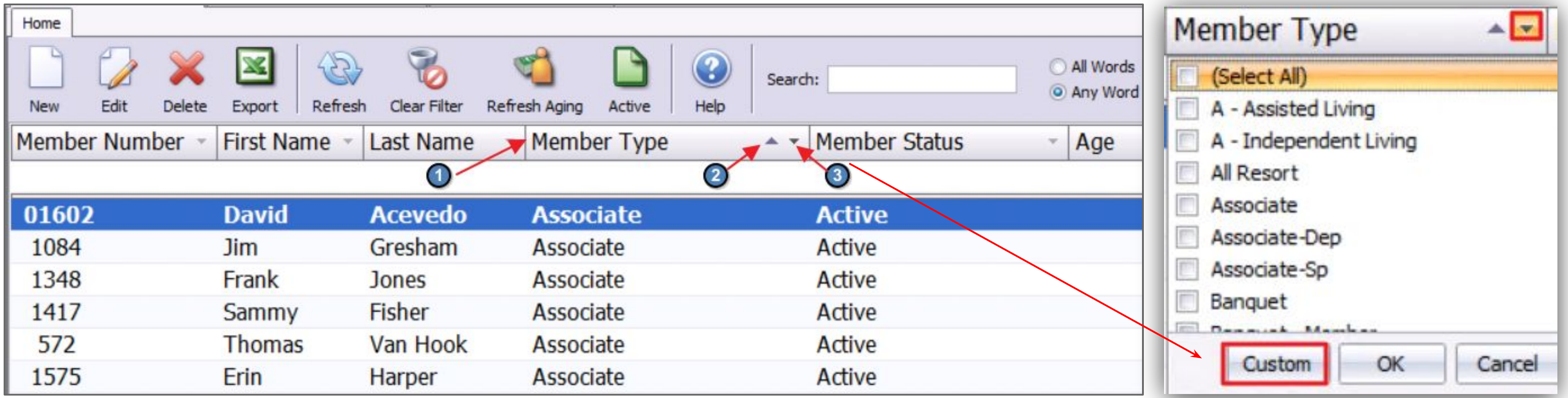
1. Select Data by **Right-Clicking** anywhere within the grid (menu selection box will appear).
2. Select **Customize Columns.**
3. Place new column headers in desired location via **drag and drop** or **double click.**

Column Width/Filter

1. Column width can also be adjusted by dragging the **right edge of a column**. You will notice the pointer icon changes to outward **pointing arrows** when adjusting column widths.

2. Grids can be **sorted** by clicking on any **column heading**. The sort order is first in **ascending** order and then switches to **descending** order when clicked a second time.

3. Grids can be **filtered** by selecting the icon that looks like a **funnel to the right of the column heading.**
    a. Quickly locate specific items by choosing from a dropdown
    b. Apply custom filters to view ranges for items such as dates or other numeric data.



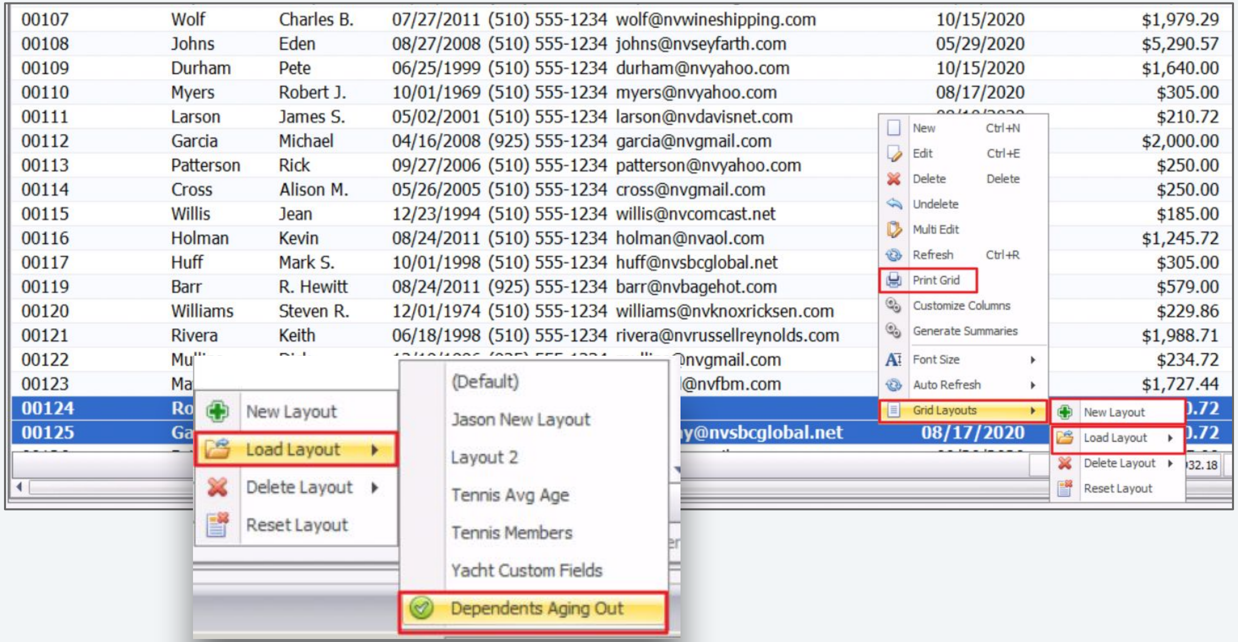
Customize Grids

Right Click on the grid and make a selection.

Customized Grids can be:

- Printed (Print Grid)
- Saved (New Layout)
- Recalled (Load Layout)

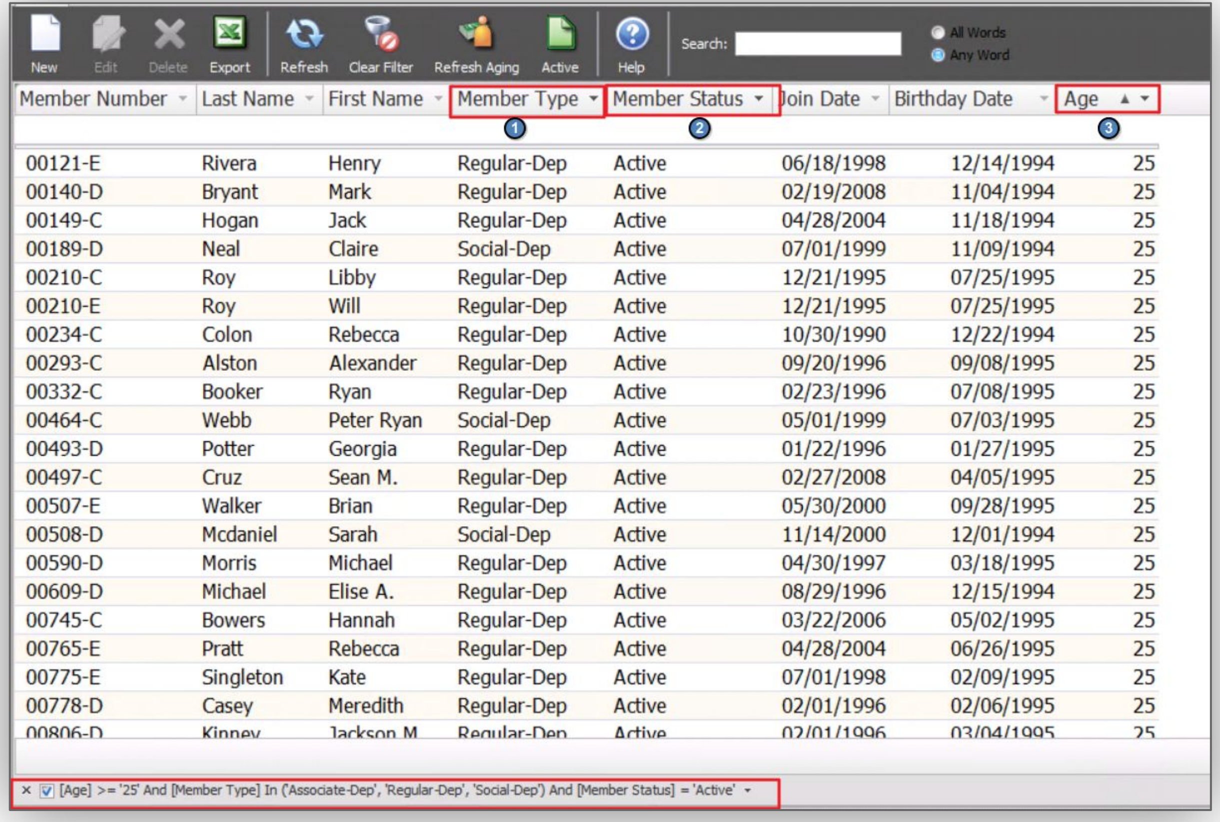
Any customization made to grids will apply only to your User ID and does not impact others.



Ways to Utilize Customized Grids

- Are my items in proper categories?
- Does my item pricing look reasonable?
- Do my $0 price items have ‘Ask for Price’ box selected?
- Are members in the correct member type based on Ages?
- Do I need to make updates to Seasonal Members or Dependent accounts?

Dependents Over 25 Example - Customize Grid (Step 1)



Member Number	Last Name	First Name	Member Type	Member Status	Join Date	Birthday Date	Age
00121-E	Rivera	Henry	Regular-Dep	Active	06/18/1998	12/14/1994	25
00140-D	Bryant	Mark	Regular-Dep	Active	02/19/2008	11/04/1994	25
00149-C	Hogan	Jack	Regular-Dep	Active	04/28/2004	11/18/1994	25
00189-D	Neal	Claire	Social-Dep	Active	07/01/1999	11/09/1994	25
00210-C	Roy	Libby	Regular-Dep	Active	12/21/1995	07/25/1995	25
00210-E	Roy	Will	Regular-Dep	Active	12/21/1995	07/25/1995	25
00234-C	Colon	Rebecca	Regular-Dep	Active	10/30/1990	12/22/1994	25
00293-C	Alston	Alexander	Regular-Dep	Active	09/20/1996	09/08/1995	25
00332-C	Booker	Ryan	Regular-Dep	Active	02/23/1996	07/08/1995	25
00464-C	Webb	Peter Ryan	Social-Dep	Active	05/01/1999	07/03/1995	25
00493-D	Potter	Georgia	Regular-Dep	Active	01/22/1996	01/27/1995	25
00497-C	Cruz	Sean M.	Regular-Dep	Active	02/27/2008	04/05/1995	25
00507-E	Walker	Brian	Regular-Dep	Active	05/30/2000	09/28/1995	25
00508-D	Mcdaniel	Sarah	Social-Dep	Active	11/14/2000	12/01/1994	25
00590-D	Morris	Michael	Regular-Dep	Active	04/30/1997	03/18/1995	25
00609-D	Michael	Elise A.	Regular-Dep	Active	08/29/1996	12/15/1994	25
00745-C	Bowers	Hannah	Regular-Dep	Active	03/22/2006	05/02/1995	25
00765-E	Pratt	Rebecca	Regular-Dep	Active	04/28/2004	06/26/1995	25
00775-E	Singleton	Kate	Regular-Dep	Active	07/01/1998	02/09/1995	25
00778-D	Casey	Meredith	Regular-Dep	Active	02/01/1996	02/06/1995	25
00806-D	Kinney	Jackson M.	Regular-Dep	Active	02/01/1996	03/04/1995	25

[Age] >= '25' And [Member Type] In ('Associate-Dep', 'Regular-Dep', 'Social-Dep') And [Member Status] = 'Active'

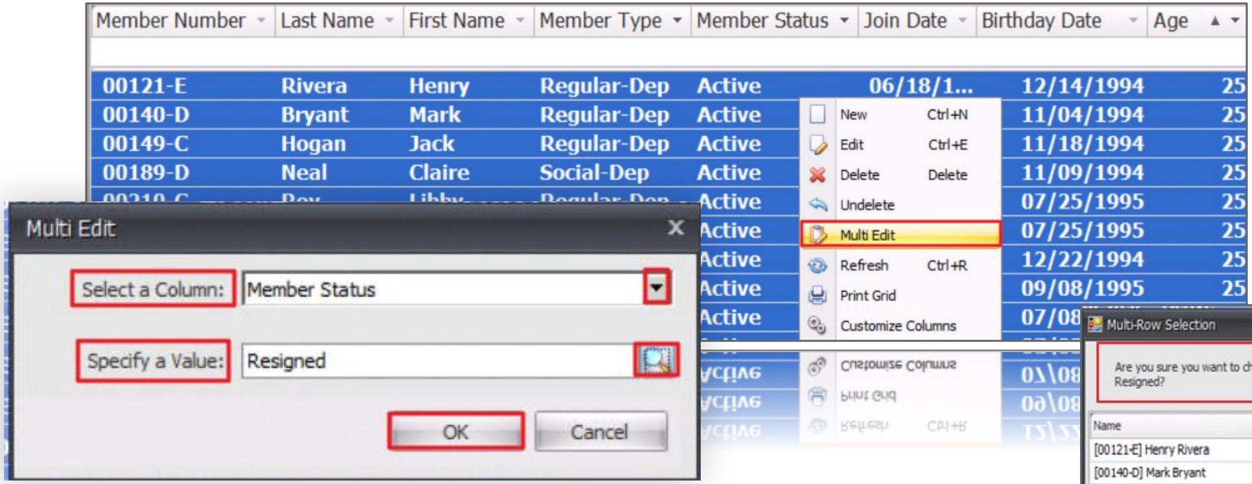
Create a **New Layout and** Include **Column Headers**

- Member Type
- Member Status
- Birthday Date
- Age

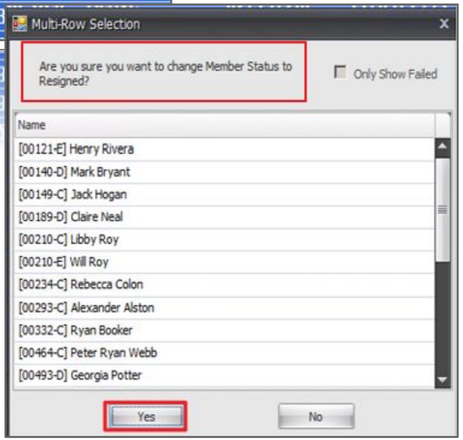
1. Filter **Member Type** to include all **Dep** types.
2. Filter **Member Status to** include all **Active** Status.
3. Filter **Age** to show anyone who is **25.**

Multi-Edit Tool

1. Using your mouse, **highlight all the records** you wish to change, **right click** anywhere on the member grid.



2. Select the **Multi Edit** Option.



The Multi Edit tool allows you to select which *Column* to edit and then choose a *Value to* apply to all the highlighted records in that column.

In this example, we want to edit the *Member Status* Column and changed all these Dependents from Active to *Resigned*. Click OK.

Confirm the changes, by clicking YES.

Result

*The same steps can be taken to change the **Member Type** to Resigned as well.

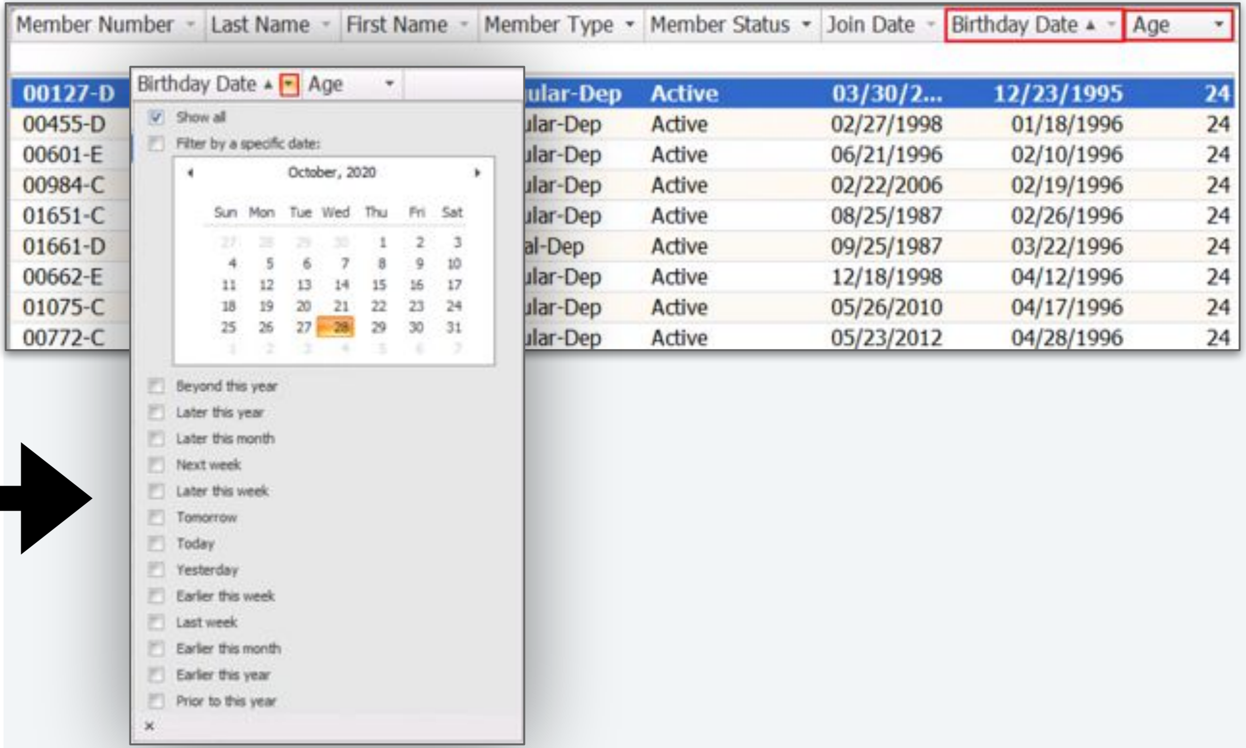
All the Selected Records now have a Resigned Status

Member Number	Last Name	First Name	Member Type	Member Status
00121-E	Rivera	Henry	Regular-Dep	Resigned
00140-D	Bryant	Mark	Regular-Dep	Resigned
00149-C	Hogan	Jack	Regular-Dep	Resigned
00189-D	Neal	Claire	Social-Dep	Resigned
00210-C	Roy	Libby	Regular-Dep	Resigned
00210-E	Roy	Will	Regular-Dep	Resigned
00234-C	Colon	Rebecca	Regular-Dep	Resigned
00293-C	Alston	Alexander	Regular-Dep	Resigned
00332-C	Booker	Ryan	Regular-Dep	Resigned
00464-C	Webb	Peter Ryan	Social-Dep	Resigned

Scheduled Changes

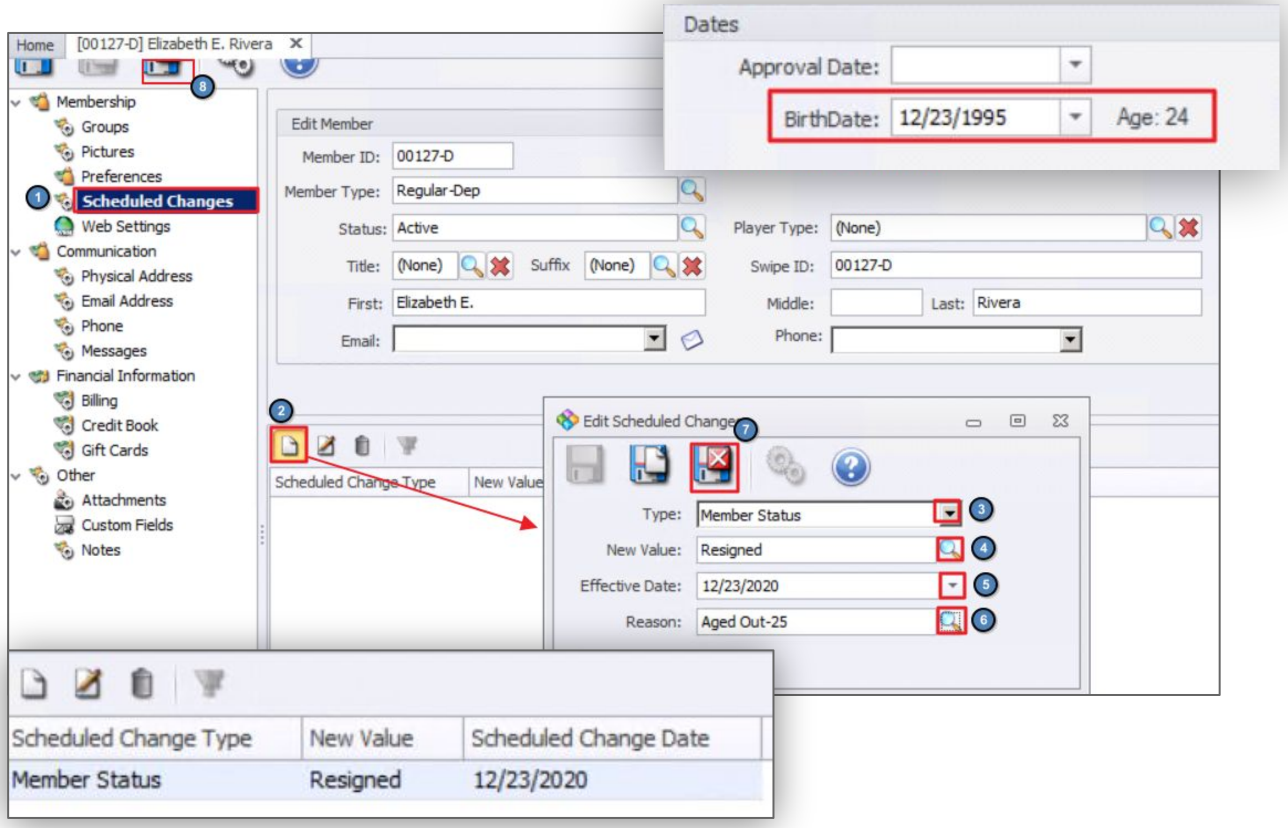
Start by updating the **Age** column to filter anyone who is **24.**

Next, sort the **Birthday Date** column in *ascending* order, or customize based on a range of criteria.



Now that the data is organized, you are ready to set up the actual **Scheduled Change**!

Create New Scheduled Change



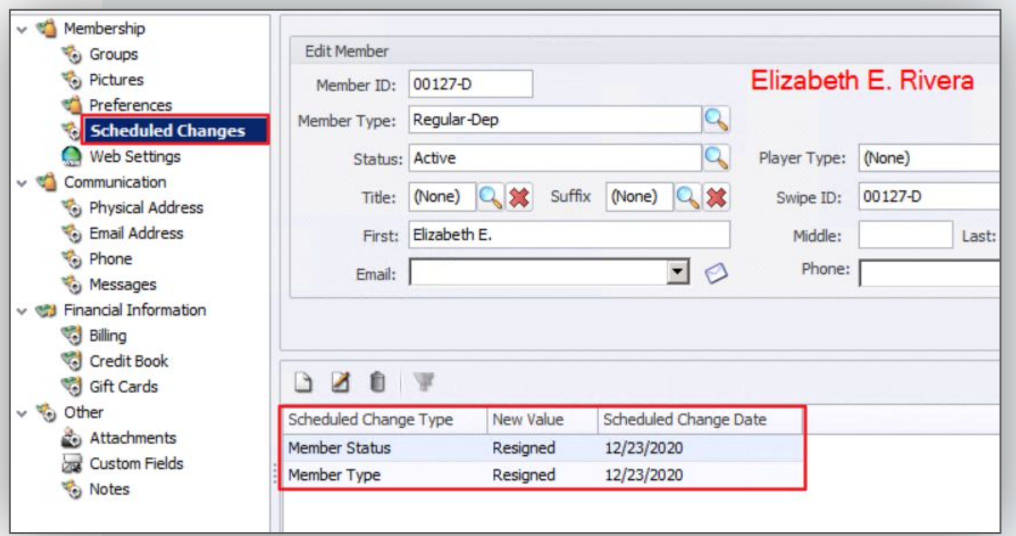
1. Navigate to the **Scheduled Changes** tab.
2. Click the **New** Icon.
3. Set the change **TYPE.**
4. Select the **New Value.**
5. Set the **Effective Date** (use the DOB with the current year).
6. Set the **Reason** for the change.
7. **Save and Close** the Scheduled Change.
8. **Save and Close** the Member record.

Result

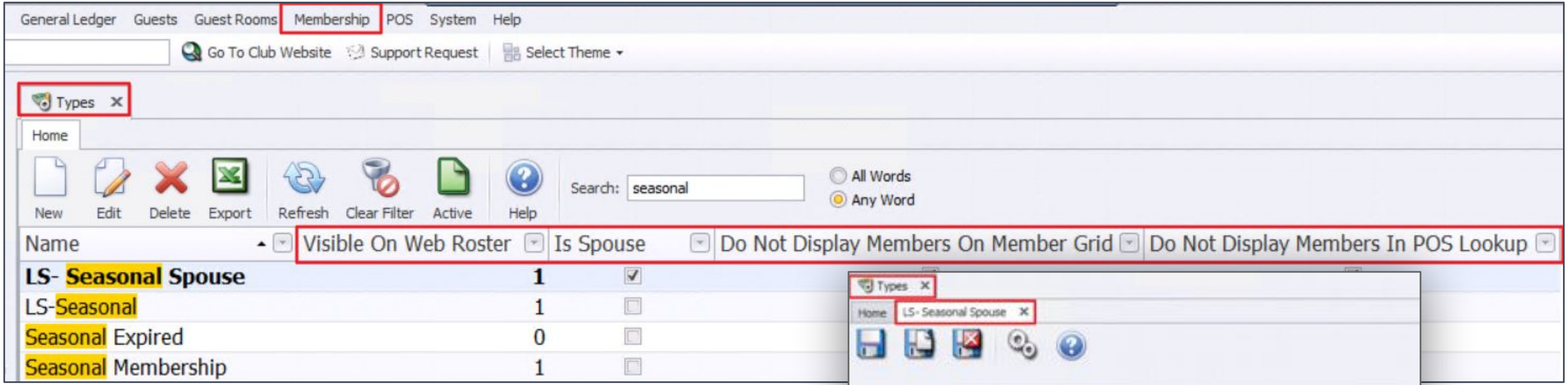
Scheduled Changes automatically update the programmed changed on the set date.

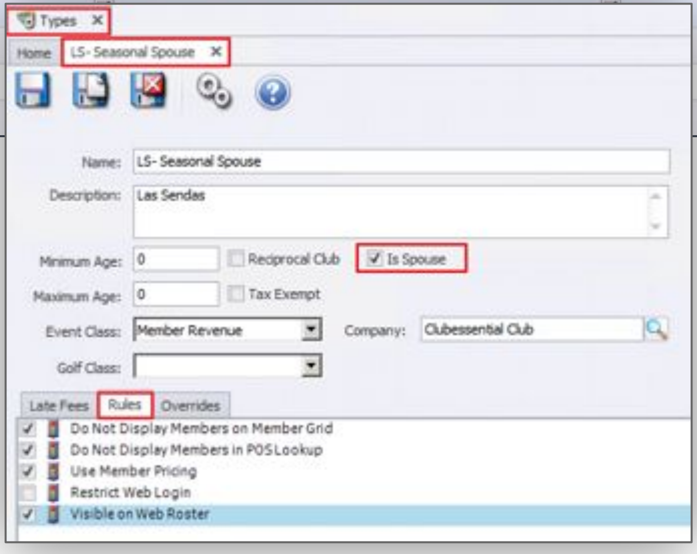
These changes will automatically trigger a roster sync to update the member's web profile.

This allows admins to pre-schedule changes months in advance.



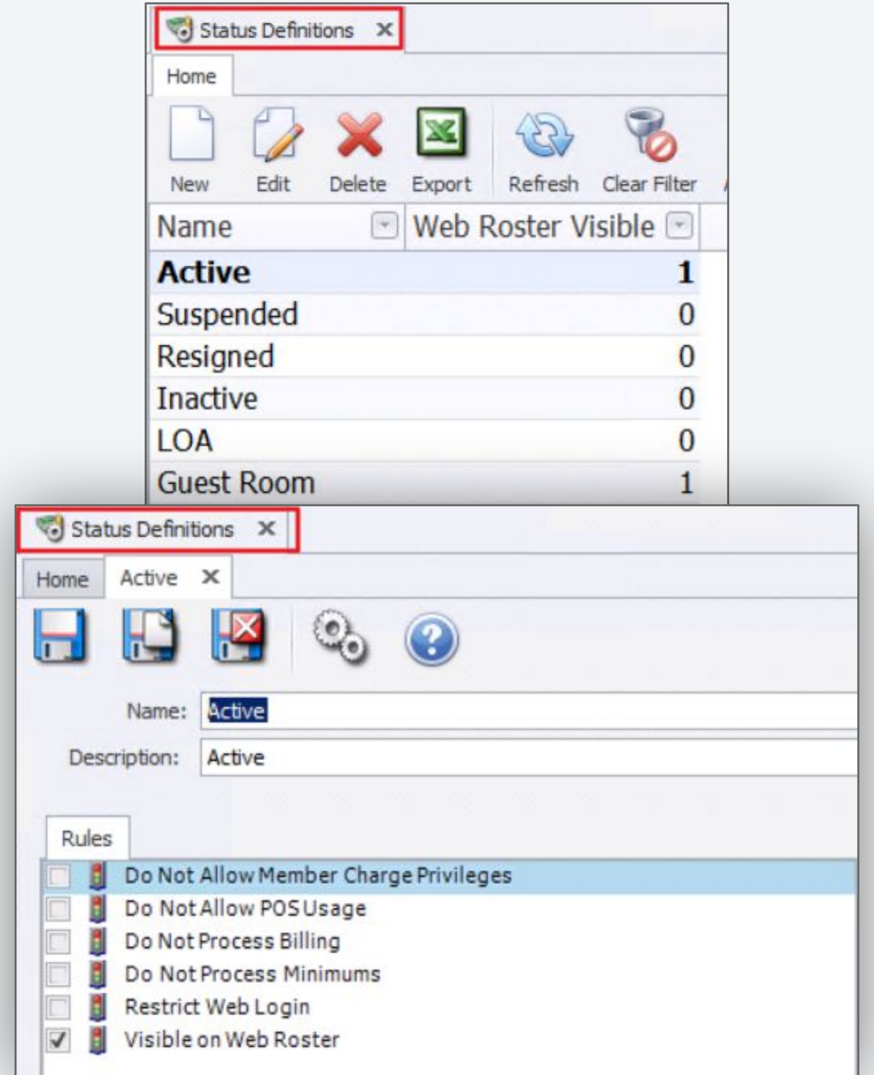
Member Type Rules





Items to Review:

- Display on member grid
- Display in POS
- Use Member Pricing
- Visible on Web Roster
- Is Spouse Type?



Member Status Rules

Just like a Member Type, Rules can be applied to a Member Status that affect Billing, POS, Minimums and Web Visibility.

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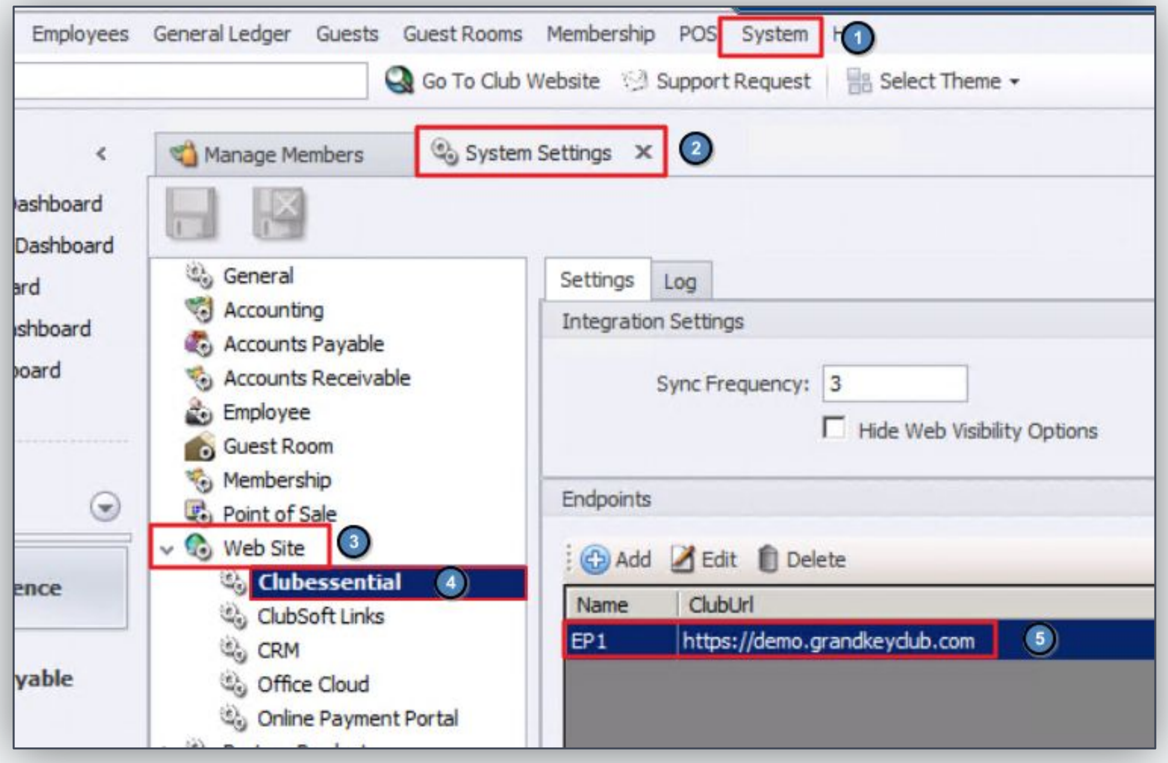
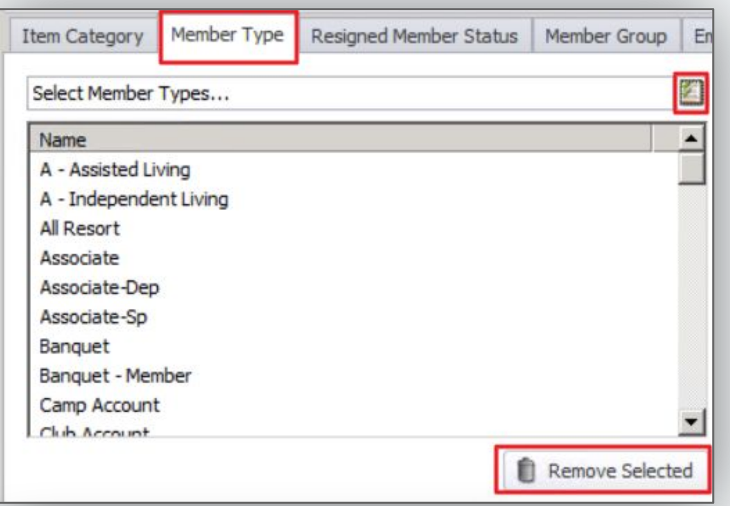
Unification Reminders

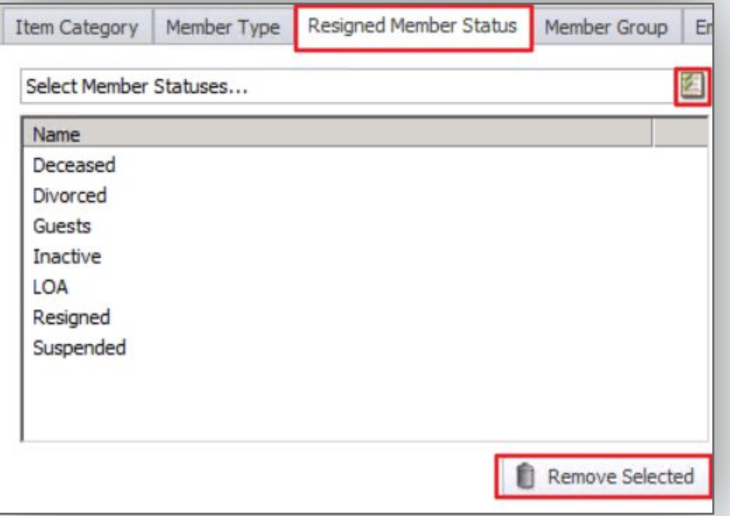
Review Sync Configuration and Groups

Access Unification Settings

1. Go to **System** (across the top).
2. **System Settings.**
3. Navigate to **Web Site** and expand the tree.
4. Select **Clubessential.**
5. Double Click the **URL highlighted in blue** to Open the Unification Settings.







Review Sync Selections

On the **Member Type** tab, check to ensure that all newly created member types are flagged (checked) to sync and remove any outdated/unwanted member types.

*Member's in types removed can be purged from the Delete Queue on the web.

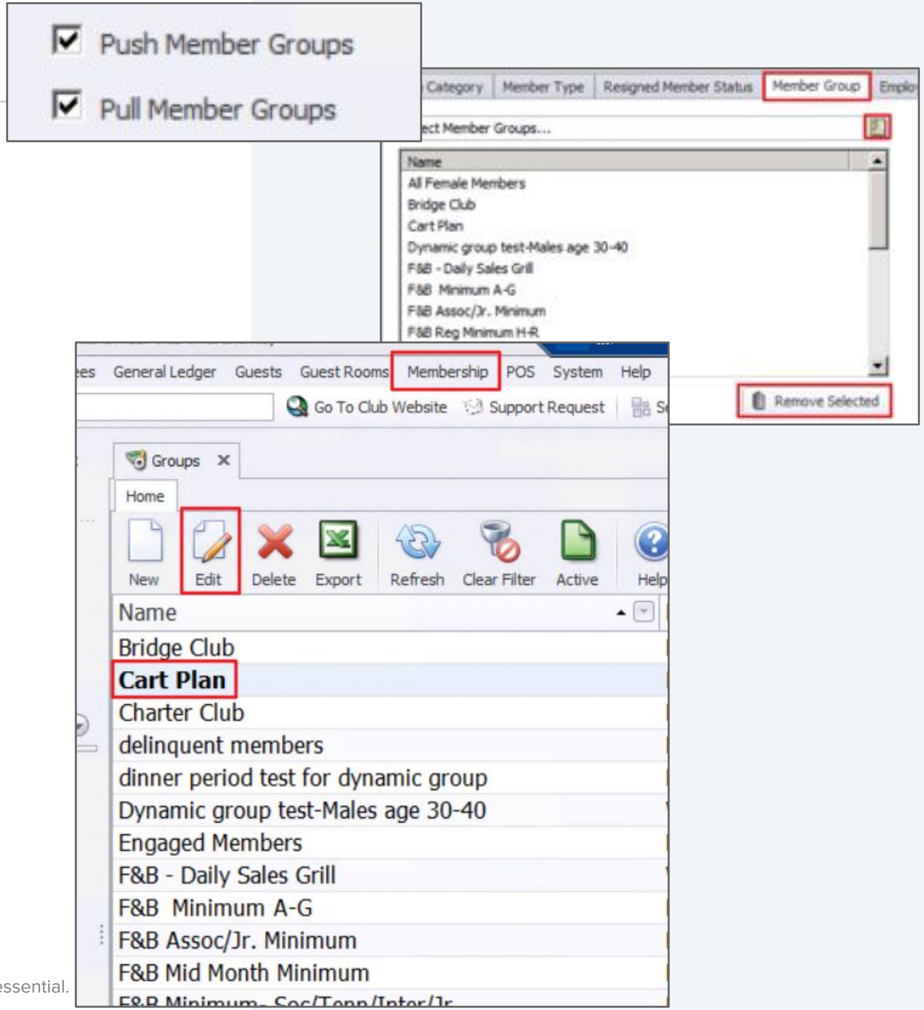
On the **Member Status** tab, review that no changes are needed to indicate which office status' will make a member inactive on the web.

Groups

In the **Unification Settings**, make sure the Group **Push/Pull** options are enabled.

Review the list of **synced groups**, removing any outdated groups or adding new groups.

Manage Groups, (***Membership>Groups***) by making any necessary edits to members within **Static Groups** or Updating Parameters configured for **Dynamic Groups.**



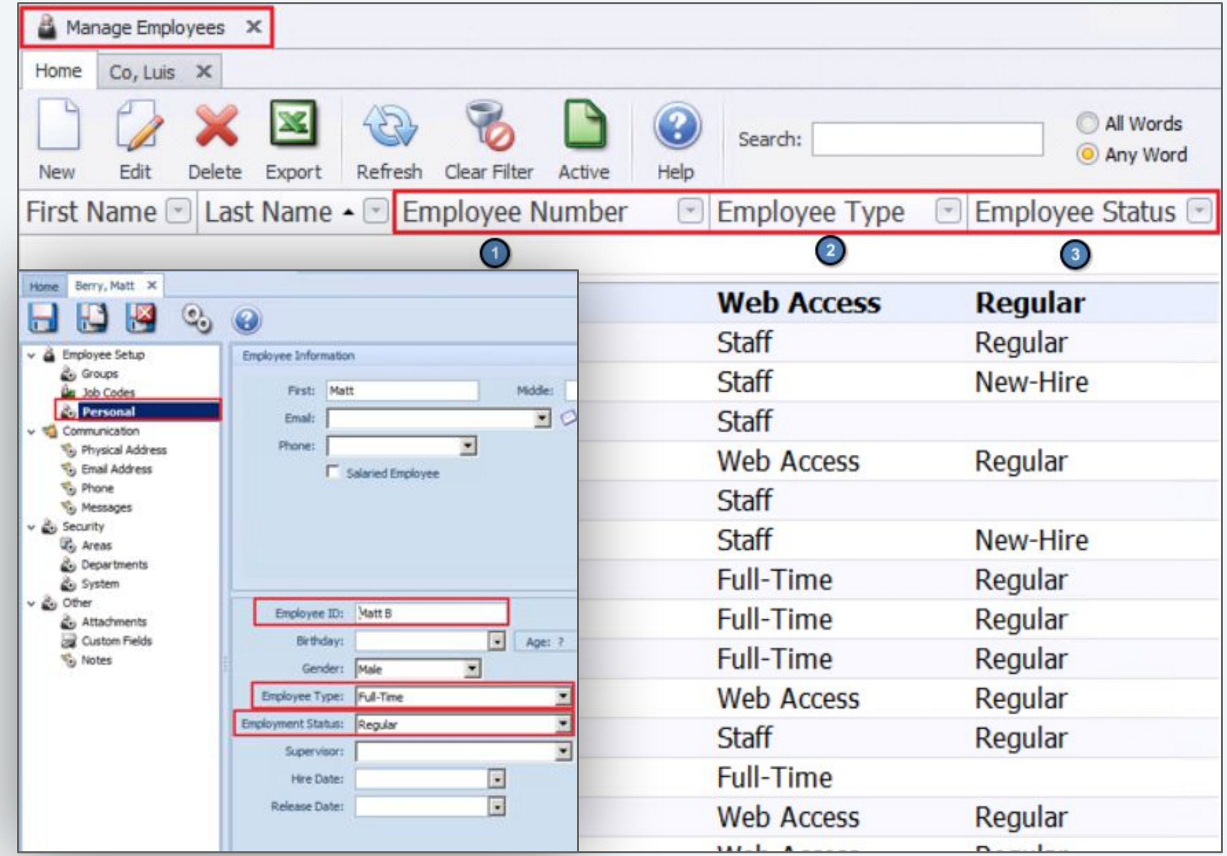
Manage Employees-Personal Tab

- Do all employees have an **Employee Number?**
- Update **Types/Status** on **terminated** employees.
- Do all employees have a **Status?**

When Terminating an employee, It's ***ideal*** *to update both the employee* ***Type*** *and* ***Status*** *for web purposes.*

Employees who are syncing to the web must have an ***Employee Number*** *in order to be assigned web permissions as an admin.*

Employees must have a ***Status*** *to sync to the web roster.*



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Q&A