



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

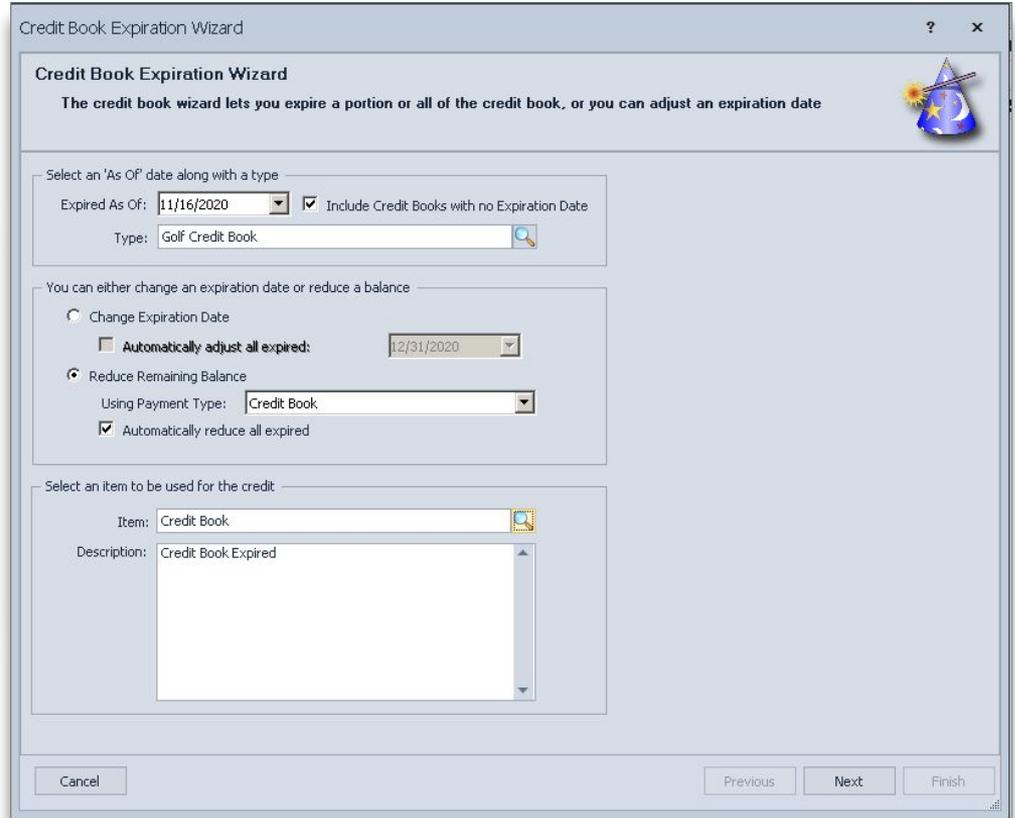
- Customize Grids
- Multi-edit Tool
- Scheduled Task
- Member Type/Status Rules

Unification Review

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

Billing and Reports

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.

Credit Book Expiration Wizard

Credit Book Expiration Wizard

Enter a value in the 'Expire Amount' column to expire all or a portion of the credit book



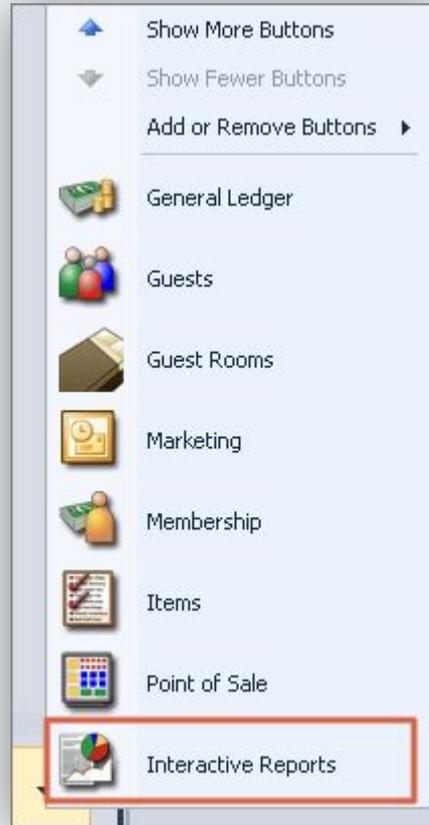
Issued To	Description	Amount	Remaining	Expire Date	Expire Amount
Jones, Vincent [00900]	MMG July 19 - 2nd place	\$50.00	\$30.00		\$30.00
Michaels, Jordan [1696]	MMG July 20	\$25.00	\$25.00		\$25.00
Smith, Bradley [1181]	MMG July 20	\$100.00	\$100.00		\$100.00
Smith, Edmund [00142]	MMG July - 1st place	\$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 hojlers 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 hojlers 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

Cancel Previous Next Finish

← Outstanding Credit Book Report

Navigate to the **Interactive Reports** module.

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



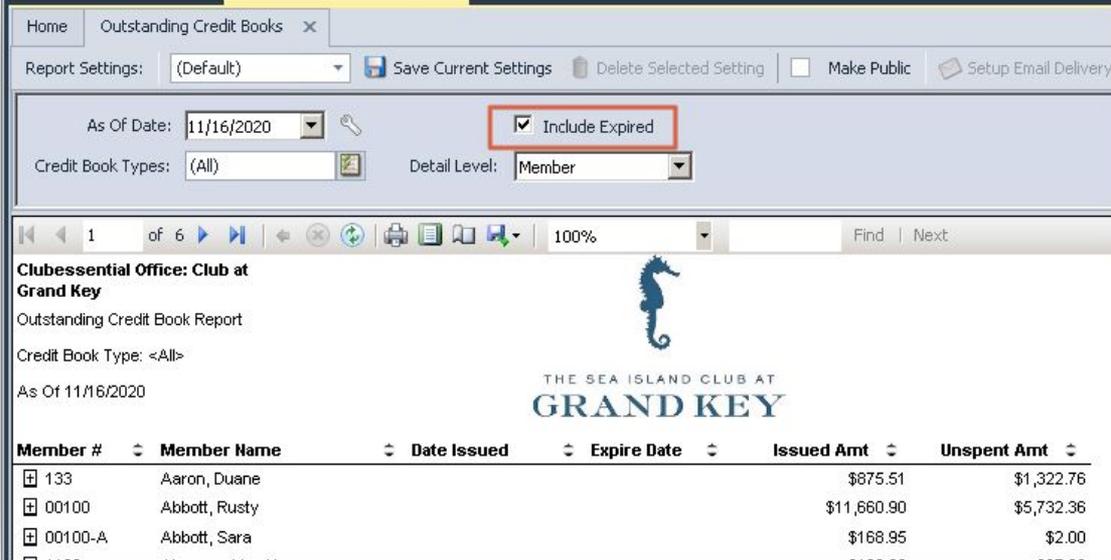
Outstanding Credit Books

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.



Home Outstanding Credit Books x

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

As Of Date: 11/16/2020 Include Expired

Credit Book Types: (All) Detail Level: Member

1 of 6 100% Find | Next

Clubessential Office: Club at Grand Key

Outstanding Credit Book Report

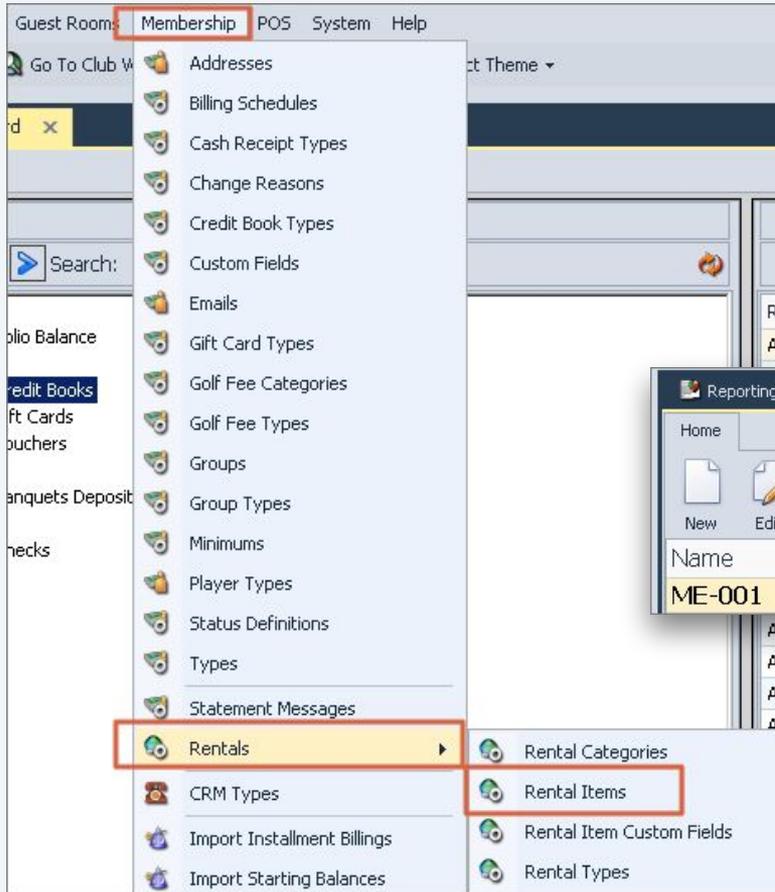
Credit Book Type: <All>

As Of 11/16/2020

Member #	Member Name	Date Issued	Expire Date	Issued Amt	Unspent Amt
133	Aaron, Duane			\$875.51	\$1,322.76
00100	Abbott, Rusty			\$11,660.90	\$5,732.36
00100-A	Abbott, Sara			\$168.95	\$2.00

Rentals

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



Guest Rooms | **Membership** | POS | System | Help

- Go To Club Website
- 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
- Player Types
- Status Definitions
- Types
- Statement Messages
- Rentals**
 - Rental Categories
 - Rental Items**
 - Rental Item Custom Fields
 - Rental Types
- CRM Types
- Import Installment Billings
- Import Starting Balances

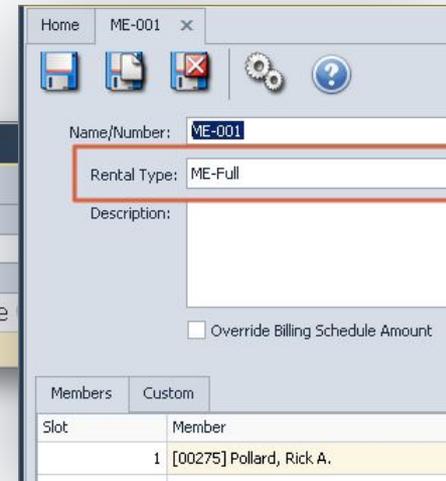


Reporting Dashboard | Rental Items

Home

New Edit Delete Export Refresh Clear Filter Active Help

Name	Attached Members	Rental Object Type Name
ME-001	Pollard (Rick A.)	ME-Full



Home | ME-001

Name/Number: ME-001

Rental Type: ME-Full

Description:

Override Billing Schedule Amount

Members	Custom
Slot	Member
1	[00275] Pollard, Rick A.



Rental Type

The screenshot shows the Clubessential software interface. The main menu on the left includes: 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, Player Types, Status Definitions, Types, Statement Messages, **Rentals**, CRM Types, Import Installment Billings, Import Starting Balances, and Import Minimum Adjustments. The **Rentals** menu is expanded, showing: Rental Categories, Rental Items, Rental Item Custom Fields, and **Rental Types**. The **Rental Types** window is open, showing a form for the 'ME-Full' type. The form includes fields for Name (ME-Full), Description, Area (Administration), Rental Category (Mens East), and Max Rental Count (2). Below the form is a table with the following data:

Occupant Count	Billing Schedule
1	Mens Full Locker
2	Mens Half Locker

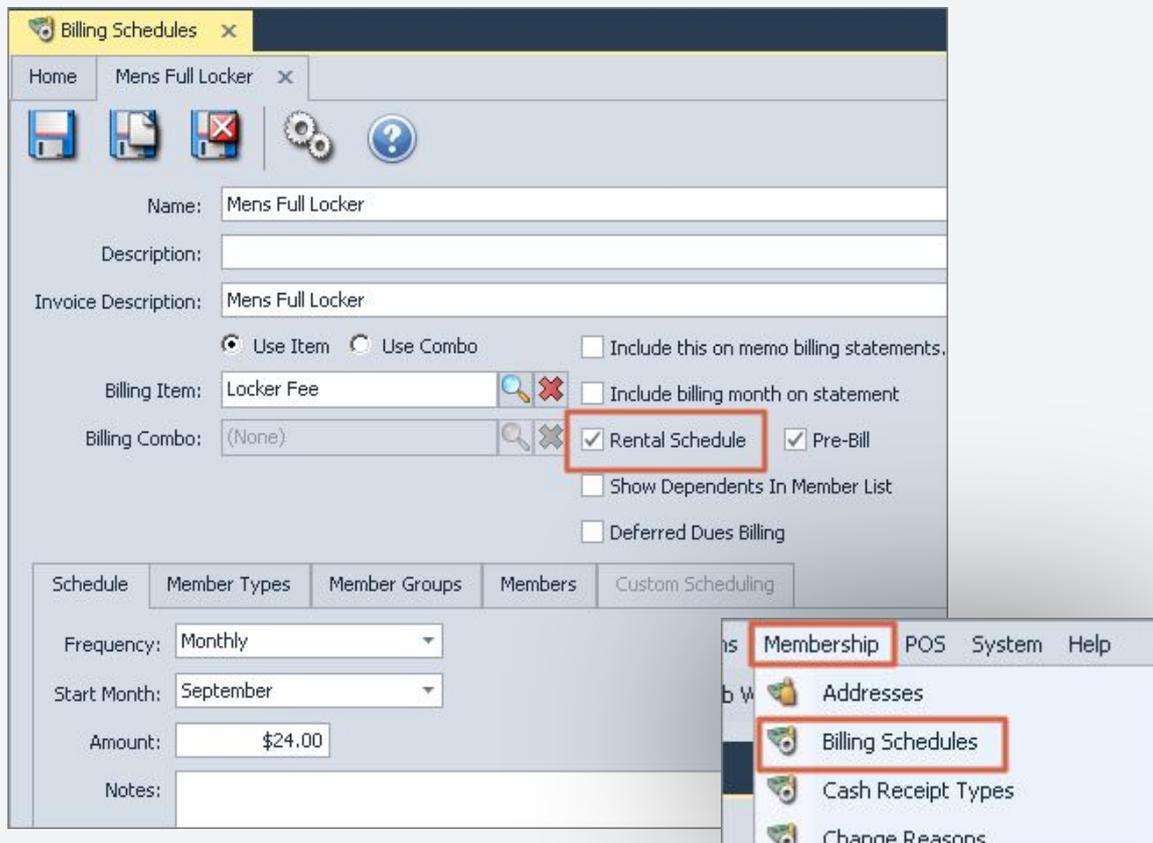
Rental Items are connected to Billing Schedules based on their **Rental Type**.

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.

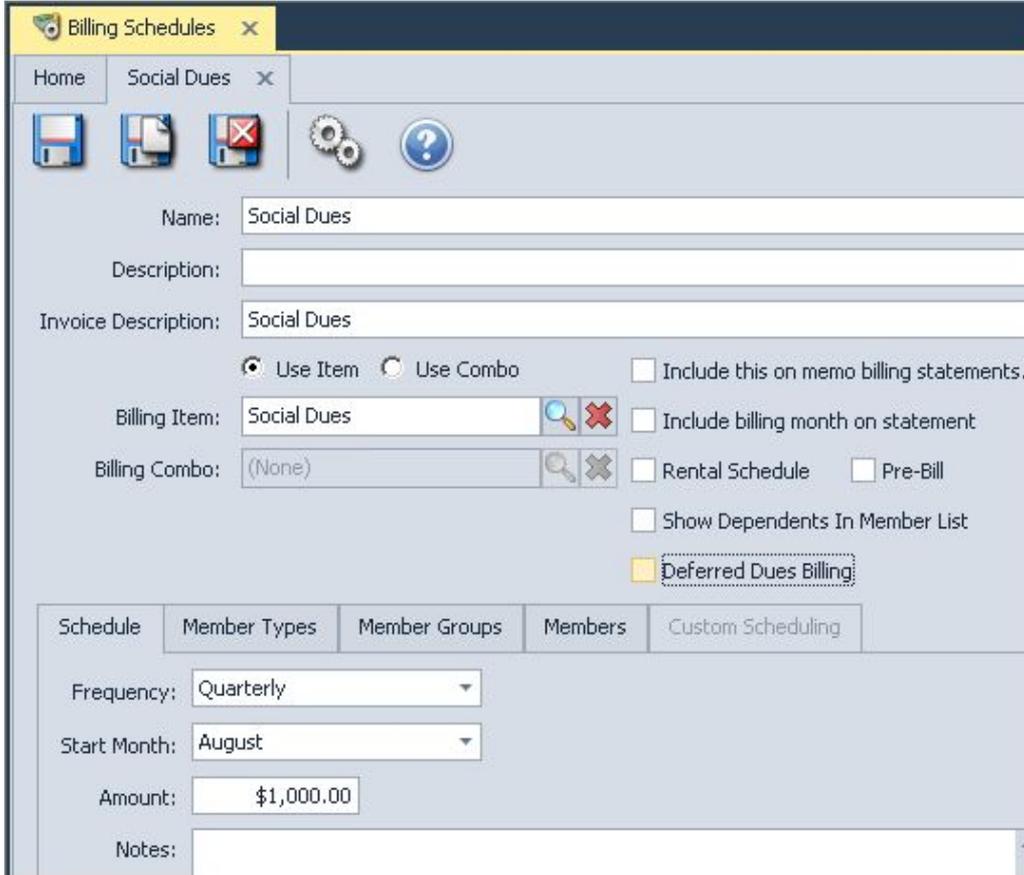
*Member Type, Member Group, and Members tab do not interact with a rental.



The screenshot shows the 'Billing Schedules' window for 'Mens Full Locker'. The 'Rental Schedule' checkbox is checked and highlighted with a red box. The 'Pre-Bill' checkbox is also checked. The 'Billing Item' is 'Locker Fee' and the 'Billing Combo' is '(None)'. The 'Frequency' is 'Monthly' and the 'Start Month' is 'September'. The 'Amount' is '\$24.00'. The 'Notes' field is empty. A dropdown menu is open, showing 'Membership', 'POS', 'System', and 'Help' as options, with 'Billing Schedules' highlighted by a red box.

Schedule	Member Types	Member Groups	Members	Custom Scheduling
Frequency:	Monthly			
Start Month:	September			
Amount:	\$24.00			
Notes:				

Billing Schedules



The screenshot shows a software window titled "Billing Schedules" with a sub-tab "Social Dues". The interface includes a toolbar with icons for save, print, delete, settings, and help. The form fields are as follows:

- Name: Social Dues
- Description: (empty)
- Invoice Description: Social Dues
- Use Item (selected), Use Combo (unselected), Include this on memo billing statements. (checkbox unselected)
- Billing Item: Social Dues (with search and delete icons), Include billing month on statement (checkbox unselected)
- Billing Combo: (None) (with search and delete icons), Rental Schedule (checkbox unselected), Pre-Bill (checkbox unselected)
- Show Dependents In Member List (checkbox unselected)
- Deferred Dues Billing (checkbox selected and highlighted with a dashed border)

At the bottom, there are tabs for "Schedule", "Member Types", "Member Groups", "Members", and "Custom Scheduling". The "Schedule" tab is active, showing:

- Frequency: Quarterly (dropdown)
- Start Month: August (dropdown)
- Amount: \$1,000.00 (text input)
- Notes: (text area)

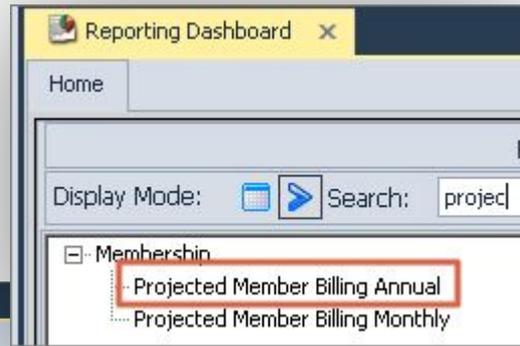
Three ways to connect to a Billing Schedule to a member:

- Type
- Group
- Individual

Member Types and Dynamic Groups will auto update.

Members and Static Groups will need to be manually adjusted.

Projected Billing Report



Reporting Dashboard x

Home Projected Member Billing Annual x

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Start Year: 2020 Start Month: January

Billing Schedules: (All) Frequencies: (All)

Member: (None) Member Types: (All)

Companies: (All) Detail Level: Billing Schedule

Group By: Billing Schedule Memo Billing Installation Billing

1 of 2 100% Find | Next

Clubessential Office: Club at Grand Key

Projected Member Billing Annual Report

Billing Schedule: <All>

Jan 2020 - Dec 2020

NOTE: Amounts may include tax if billing items are tax inclusive

Billing Schedule	Freq	Jan 20	Feb 20	Mar 20	Apr 20	May 20	Jun 20	Jul 20	Aug 20	Sep 20	Oct 20	Nov 20	Dec 20	Annual
2020 Assessment		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$5,000.00
All Resort		\$0.00	\$0.00	\$0.00	\$0.00	\$4,600.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$4,600.00
Annual Capital Foundation Contribution		\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$354,500.00	\$354,500.00

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.

Reporting Dashboard x

Home | Installation Billing x

Report Settings: (Default) Save Current Settings Delete Selected Setting Make Public Setup Email Delivery

Start Date: 1/ 1/2020 End Date: 12/31/2020

Group By: Member

Search: install

Membership

- Installation Billing
- Installation Billing Statement

Office: Club at Grand Key

THE SEA ISLAND CLUB AT GRAND KEY

Member Name	Member Type	Total Amount	Adjustment	Billed	Balance						
Bates, Allison	Social										
Billing Name	Frequency	Periods	First Bill	Next Bill	# Billed	# Left	Avg Bill				
Junior Annual Installment	Annually	9	3/31/2013	3/30/2021	5	4	\$5,000.00	\$45,000.00	\$0.00	\$25,000.00	\$20,000.00
								\$45,000.00	\$0.00	\$25,000.00	\$20,000.00

Installment Billing

Statement details individual members with their original details.

Home Installment Billing Statement x

Report Settings: (Default) Save Current Settings Delete Selected

Member: Allison Bates Completed Only

1 of 1 100%

Installment Billing Statement

11/15/2020

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

Manage Members x

Home [00126] Allison Bates x

Membership

- Groups
- Pictures
- Preferences
- Scheduled Changes
- Web Settings

Communication

- Physical Address
- Email Address
- Phone
- Messages

Financial Information

- AR Activity
- Bank Accounts
- Billing**
- Installment Billing
- Credit Book
- Credit Cards

Edit Member

Member ID: 00126

Member Type: Social

Status: Active

Title: Mrs. Suffix: (None)

First: Allison Middle: Last: Bates

Email: bates@nvgmail.com

Player Type: (None)

Swipe ID: 00126

Phone: (415) 555-1234

No image data

Quick Label

Name	Remaining Periods	Total Billed	Amount	Start Year	Start Month	Frequency	Adjustment	Periods
Junior Annual Installment	4	\$25,000.00	\$45,000.00	2013	April	Annually	\$0.00	9

Adjusting Installment Billing

Installment Billing Adjustment

Description:

Amount:

ID: 0 Loaded

Installment Billing

Name:

Billing Item:

Billing Combo:

Frequency:

Periods:

Start Month:

Start Year:

Amount:

Adjustment:

Installment Billing

Name:

Billing Item:

Billing Combo:

Frequency:

Periods:

Start Month:

Start Year:

Amount:

Adjustment:

Installment Billing

Name:

Billing Item:

Billing Combo:

Frequency:

Periods:

Start Month:

Start Year:

Amount:

Adjustment:

Schedule Adjustments

Month	Year	Amount
April	2013	\$5,000.00
April	2014	\$5,000.00
April	2015	\$5,000.00
April	2016	\$5,000.00
April	2017	\$5,000.00
April	2018	\$5,000.00
April	2019	\$5,000.00
April	2020	\$5,000.00
April	2021	\$5,000.00

Schedule Adjustments

Month	Year	Amount
April	2013	\$5,000.00
April	2014	\$5,000.00
April	2015	\$0.00
April	2016	\$5,000.00
April	2017	\$5,000.00
April	2018	\$5,000.00
April	2019	\$5,000.00
April	2020	\$5,000.00
April	2021	\$5,000.00

Schedule Adjustments

Description	Amount
Adjustment	\$5,000.00

0 of 0 records found.

ID: 86 Your total adjusted amount to bill is \$45,000.00, but your payments equi

ID: 86 Loaded

- 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 x

Home Annual Minimum x

Name: Annual Minimum

Description: Annual Minimum

Billing Item: Unspent Minimum

Prepaid Minimum

Schedule Includes These Item Groups Excluding These Areas Custom

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

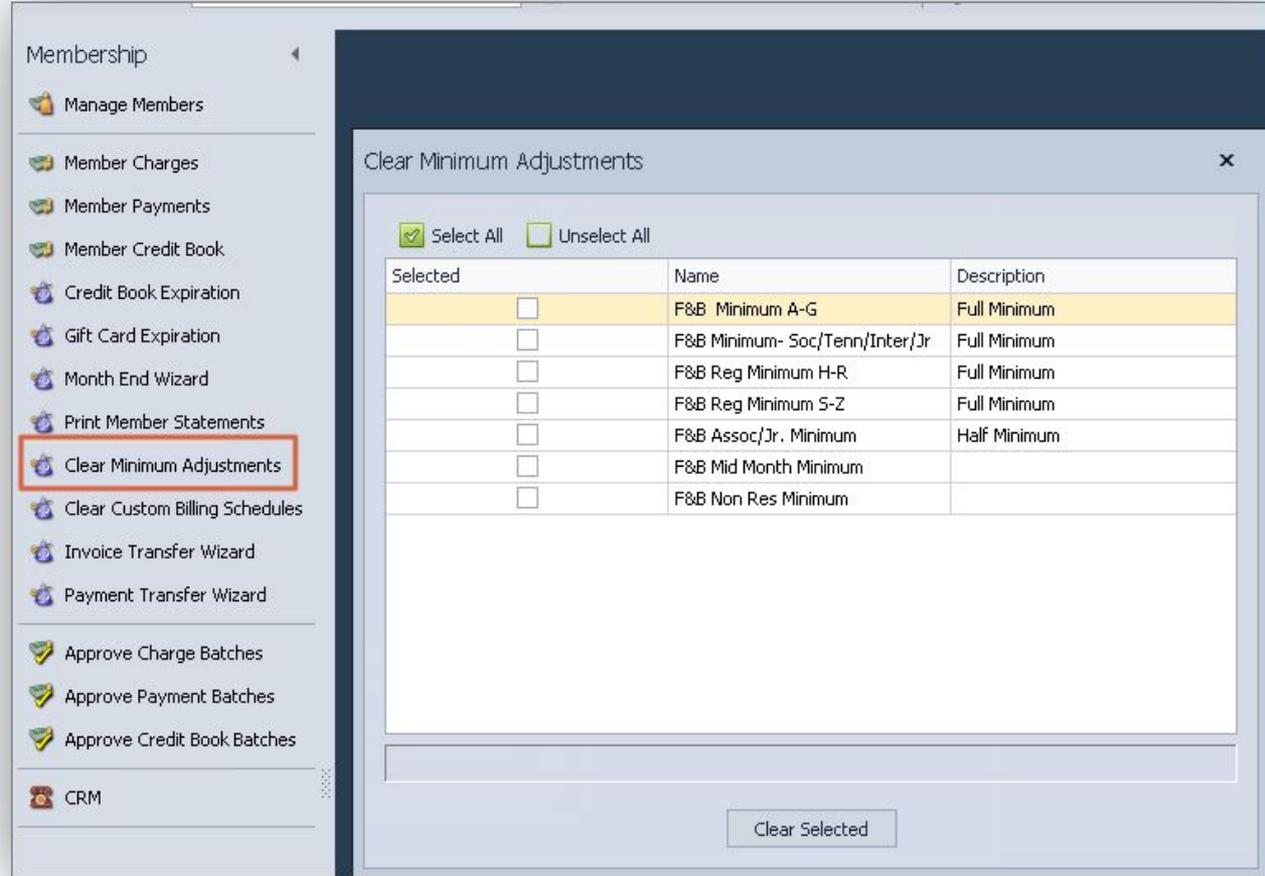
Select Areas...

- 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 Minimum Adjustments Wizard**.



Membership

- Manage Members
- Member Charges
- Member Payments
- Member Credit Book
- Credit Book Expiration
- Gift Card Expiration
- Month End Wizard
- Print Member Statements
- Clear Minimum Adjustments**
- Clear Custom Billing Schedules
- Invoice Transfer Wizard
- Payment Transfer Wizard
- Approve Charge Batches
- Approve Payment Batches
- Approve Credit Book Batches
- CRM

Clear Minimum Adjustments

Select All Unselect All

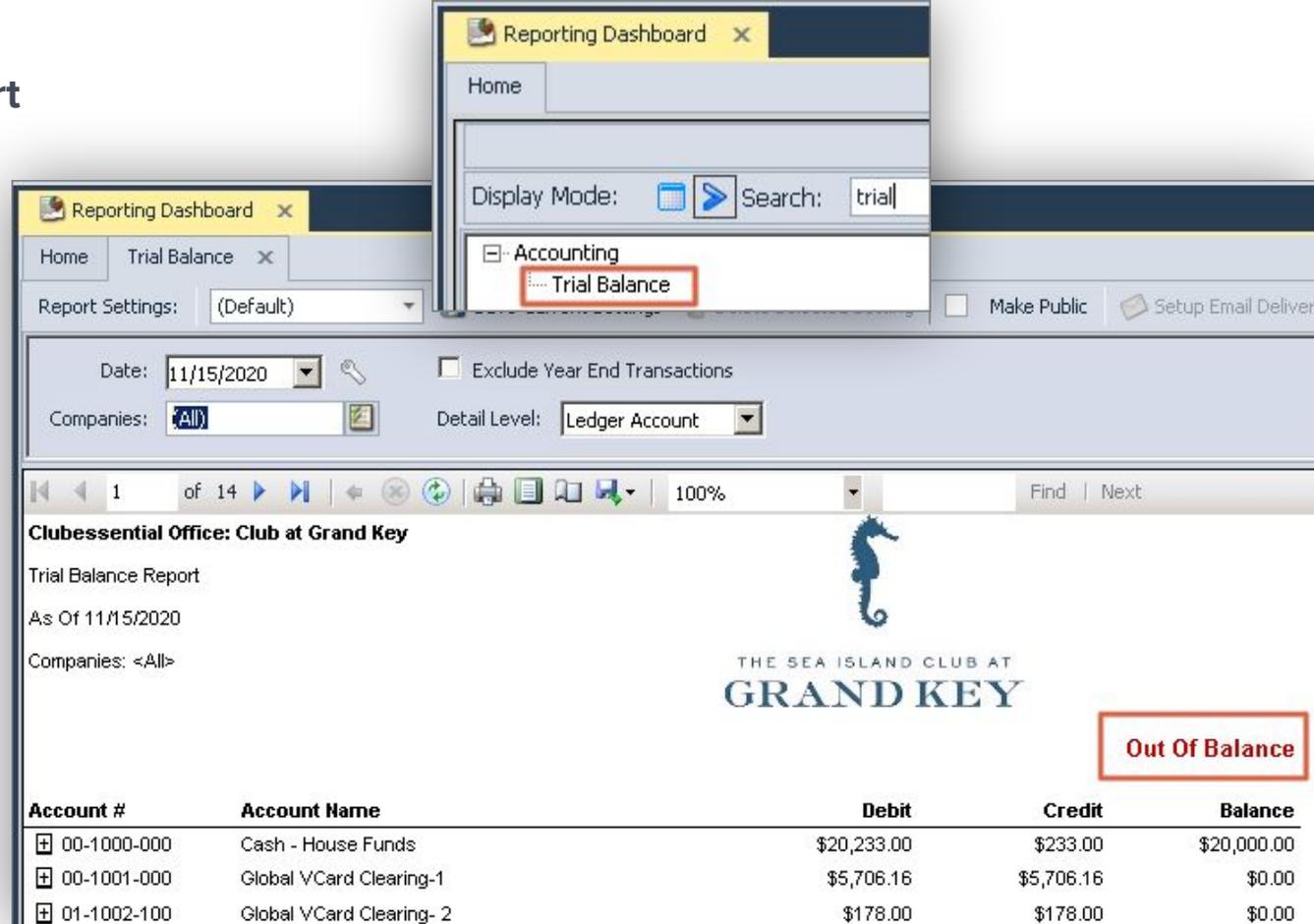
Selected	Name	Description
<input type="checkbox"/>	F&B Minimum A-G	Full Minimum
<input type="checkbox"/>	F&B Minimum- Soc/Tenn/Inter/Jr	Full Minimum
<input type="checkbox"/>	F&B Reg Minimum H-R	Full Minimum
<input type="checkbox"/>	F&B Reg Minimum S-Z	Full Minimum
<input type="checkbox"/>	F&B Assoc./Jr. Minimum	Half Minimum
<input type="checkbox"/>	F&B Mid Month Minimum	
<input type="checkbox"/>	F&B Non Res Minimum	

Clear Selected

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.



Reporting Dashboard

Home

Display Mode:   Search: trial

Accounting

Trial Balance

Report Settings: (Default)

Date: 11/15/2020  Exclude Year End Transactions

Companies: <All>  Detail Level: Ledger Account

1 of 14 100% Find | Next

Clubessential Office: Club at Grand Key

Trial Balance Report

As Of 11/15/2020

Companies: <All>

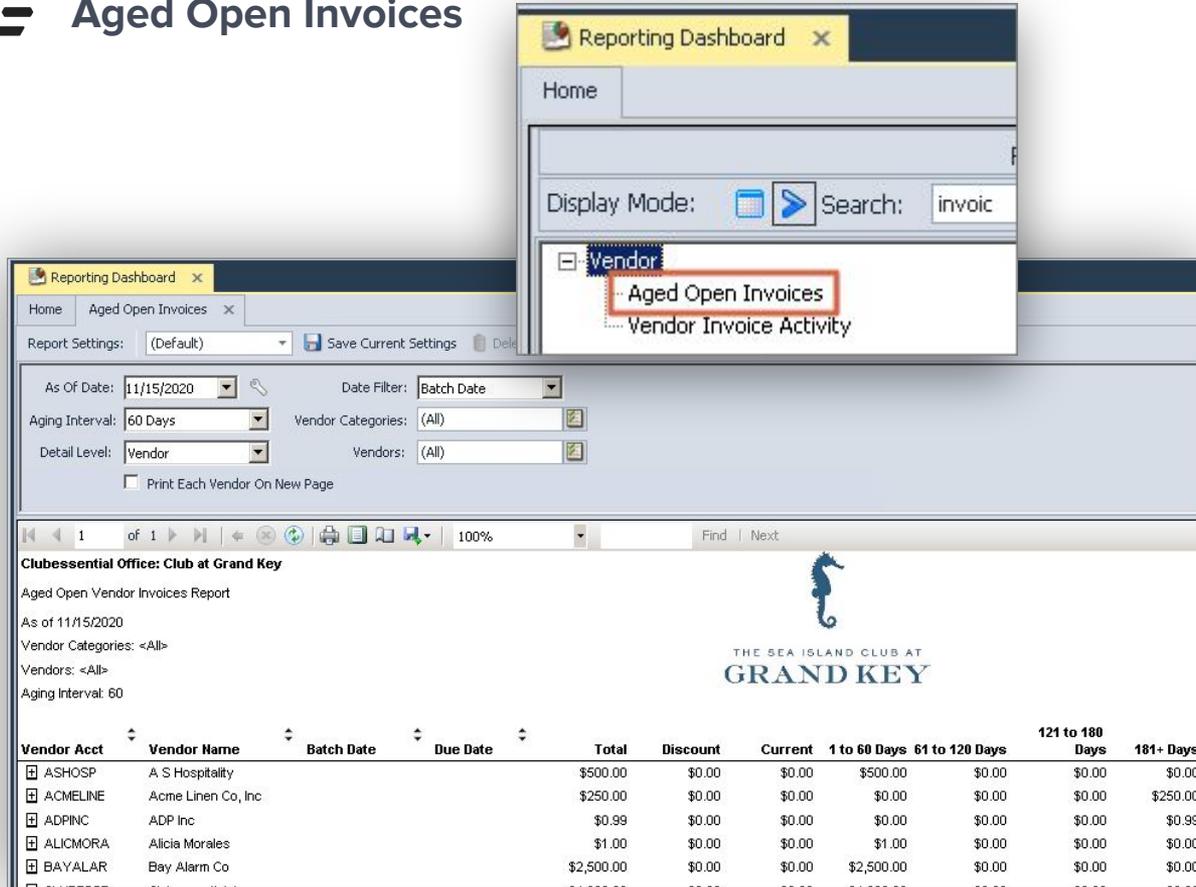


THE SEA ISLAND CLUB AT
GRAND KEY

Out of Balance

Account #	Account Name	Debit	Credit	Balance
00-1000-000	Cash - House Funds	\$20,233.00	\$233.00	\$20,000.00
00-1001-000	Global VCard Clearing-1	\$5,706.16	\$5,706.16	\$0.00
01-1002-100	Global VCard Clearing- 2	\$178.00	\$178.00	\$0.00

Aged Open Invoices



The screenshot shows the 'Reporting Dashboard' interface. The top window displays 'Home' and 'Display Mode: [Calendar Icon] [Arrow Icon] Search: invoice'. Below it, a menu shows 'Vendor' expanded with 'Aged Open Invoices' highlighted in a red box and 'Vendor Invoice Activity' below it.

The main window shows the 'Aged Open Invoices' report configuration:

- Report Settings: (Default) Save Current Settings
- As Of Date: 11/15/2020 Date Filter: Batch Date
- Aging Interval: 60 Days Vendor Categories: (All)
- Detail Level: Vendor Vendors: (All)
- Print Each Vendor On New Page

The report title is 'Clubessential Office: Club at Grand Key'. The report is for 'Aged Open Vendor Invoices Report' as of 11/15/2020, with Vendor Categories set to '<All>' and Vendors set to '<All>'. The aging interval is 60 days.

The data table below shows the following columns: Vendor Acct, Vendor Name, Batch Date, Due Date, Total, Discount, Current, 1 to 60 Days, 61 to 120 Days, 121 to 180 Days, and 181+ Days.

Vendor Acct	Vendor Name	Batch Date	Due Date	Total	Discount	Current	1 to 60 Days	61 to 120 Days	121 to 180 Days	181+ Days
ASHOSP	A S Hospitality			\$500.00	\$0.00	\$0.00	\$500.00	\$0.00	\$0.00	\$0.00
ACMELINE	Acme Linen Co, Inc			\$250.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$250.00
ADPINC	ADP Inc			\$0.99	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.99
ALICMORA	Alicia Morales			\$1.00	\$0.00	\$0.00	\$1.00	\$0.00	\$0.00	\$0.00
BAYALAR	Bay Alarm Co			\$2,500.00	\$0.00	\$0.00	\$2,500.00	\$0.00	\$0.00	\$0.00

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.

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.

A screenshot of the Clubessential Office software interface. The window title is 'Clubessential Office: Club at Grand Key'. The main area displays a table of membership data. A context menu is open over the table, with 'Customize Columns' highlighted. The table has the following columns: Member Number, First Name, Last Name, Member Type, and Member Status. The data rows are as follows:

Member Number	First Name	Last Name	Member Type	Member Status
00104	Stephen	English	Senior	Active
00105	Sally	Moore	Senior	Active
00106	Joseph E.	Boyer	Senior	Active
00107	Charles B.	Wolf	Regular	Active
00108	Eden	Johns	Social	Active
00109	Pete	Durham	Regular	Active
00111	James S.	Larson	Senior	Active
00112	Michael	Garcia	Regular	Active
00113	Rick	Patterson	Tennis	Active
00114	Allison M.	Cross	Tennis	Active
00115	Jean	Willis	Senior	Active
00116	Kevin	Holman	Regular	Active
00117	Mark S.	Huff	Social	Active
00119	R. Hewitt	Barr	Social	Active
00120	Steven R.	Williams	Senior	Active
00121	Keith	Rivera	Regular	Active
00122	Dick	Mullins	Senior	Active
00123	George T.	Maynard	Regular	Active
00124	J. Richard	Rodgers	Senior	Active
00125	William B.	Galloway	Senior	Active
00126	Allison	Bates	Social	Active
00127	Richard T.	Rivera	Regular	Active

How to Customize Column Headers

First Name	Last Name	Member Type	Member Status
Stephen	English	Senior	Active
Sally	Moore	Senior	Active
Joseph E.	Boyer	Senior	Active
Charles B.	Wolf	Regular	Active
Eden	Johns	Social	Active
Pete	Durham	Regular	Active
James S.	Larson	Senior	Active
Michael	Garcia	Regular	Active
Rick	Patterson	Tennis	Active
Alison M.	Cross	Tennis	Active

- New Ctrl+N
- Edit Ctrl+E
- Delete Delete
- Undelete
- Multi Edit
- Refresh Ctrl+R
- Print Grid
- Customize Columns**
- Generate Summaries

(Drag & Drop or Double-Click)

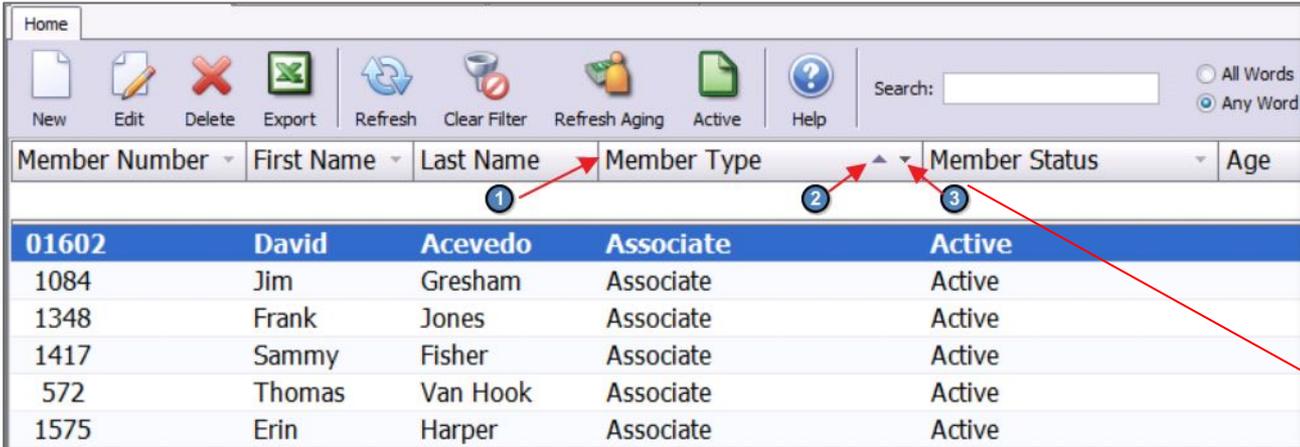
Age
Age Demo
Age Joined (Custom Field)
Alt Name
Approval Date
AR Balance Threshold
Auto Payment
Billing Member ID
Birthday Date
Boat #1 Beam (Custom Field)

Member Number	First Name	Last Name	Member Type	Age	Birthday Date
00104	Stephen	English	Senior	76	05/08/1944
00105	Sally	Moore	Senior	88	02/19/1932
00106	Joseph E.	Boyer	Senior	78	02/09/1942

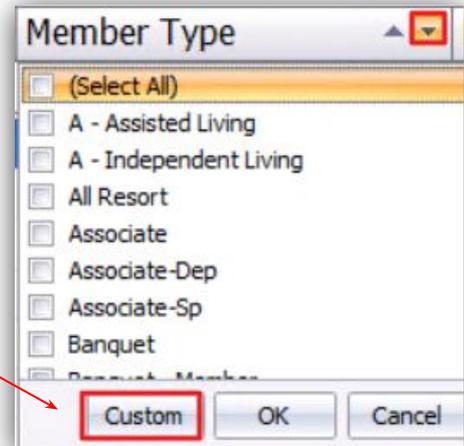
1. Select Data by **Right-Clicking** anywhere within the grid (menu selection box will appear).
2. Select **Customize Columns**.
3. Place new column headers in desired location via **drag and drop** or **double click**.

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.



Member Number	First Name	Last Name	Member Type	Member Status	Age
01602	David	Acevedo	Associate	Active	
1084	Jim	Gresham	Associate	Active	
1348	Frank	Jones	Associate	Active	
1417	Sammy	Fisher	Associate	Active	
572	Thomas	Van Hook	Associate	Active	
1575	Erin	Harper	Associate	Active	



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.

The screenshot shows a data grid with columns for ID, Name, Date, and Amount. A right-click context menu is open over the grid, displaying options: New Layout, Load Layout, Delete Layout, and Reset Layout. A secondary menu is open for 'Load Layout', listing various saved layouts: (Default), Jason New Layout, Layout 2, Tennis Avg Age, Tennis Members, Yacht Custom Fields, and Dependents Aging Out. A third menu is open for 'Grid Layouts', listing: New Layout, Load Layout, Delete Layout, and Reset Layout. Red boxes highlight the 'Load Layout' option in the main menu, the 'Load Layout' option in the secondary menu, and the 'Dependents Aging Out' option in the secondary menu.

00107	Wolf	Charles B.	07/27/2011 (510) 555-1234	wolf@nvwinshipping.com	10/15/2020	\$1,979.29
00108	Johns	Eden	08/27/2008 (510) 555-1234	johns@nvseyfarth.com	05/29/2020	\$5,290.57
00109	Durham	Pete	06/25/1999 (510) 555-1234	durham@nv@yahoo.com	10/15/2020	\$1,640.00
00110	Myers	Robert J.	10/01/1969 (510) 555-1234	myers@nv@yahoo.com	08/17/2020	\$305.00
00111	Larson	James S.	05/02/2001 (510) 555-1234	larson@nvdavisnet.com	08/17/2020	\$210.72
00112	Garcia	Michael	04/16/2008 (925) 555-1234	garcia@nv@gmail.com		\$2,000.00
00113	Patterson	Rick	09/27/2006 (510) 555-1234	patterson@nv@yahoo.com		\$250.00
00114	Cross	Alison M.	05/26/2005 (510) 555-1234	cross@nv@gmail.com		\$250.00
00115	Willis	Jean	12/23/1994 (510) 555-1234	willis@nvcomcast.net		\$185.00
00116	Holman	Kevin	08/24/2011 (510) 555-1234	holman@nvaol.com		\$1,245.72
00117	Huff	Mark S.	10/01/1998 (510) 555-1234	huff@nvbcglobal.net		\$305.00
00119	Barr	R. Hewitt	08/24/2011 (925) 555-1234	barr@nvbagehot.com		\$579.00
00120	Williams	Steven R.	12/01/1974 (510) 555-1234	williams@nvknorricksen.com		\$229.86
00121	Rivera	Keith	06/18/1998 (510) 555-1234	rivera@nvrussellreynolds.com		\$1,988.71
00122	Mu...					\$234.72
00123	Ma...			@nvfbm.com		\$1,727.44
00124	Ro...					0.72
00125	Ga...			@nvbcglobal.net	08/17/2020	0.72

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	Kinnev	Jackson M.	Regular-Dep	Active	02/01/1996	03/04/1995	25

Filter: [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

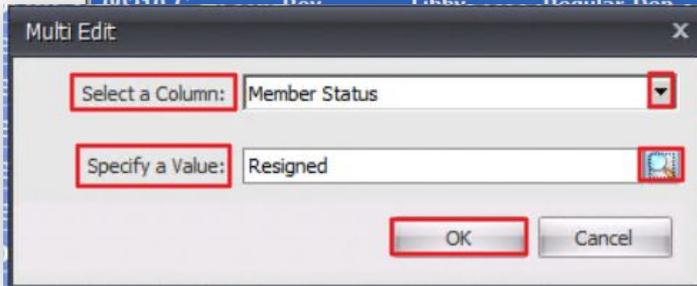
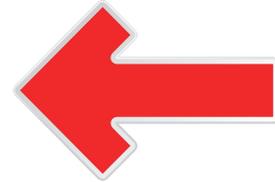
1. Filter **Member Type** to include all **Dep** types.
2. Filter **Member Status** to include all **Active** Status.
3. Filter **Age** to show anyone who is **25**.

Multi-Edit Tool

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

Member Number	Last Name	First Name	Member Type	Member Status	Join Date	Birthday Date	Age
00121-E	Rivera	Henry	Regular-Dep	Active	06/18/1...	12/14/1994	25
00140-D	Bryant	Mark	Regular-Dep	Active		11/04/1994	25
00149-C	Hogan	Jack	Regular-Dep	Active		11/18/1994	25
00189-D	Neal	Claire	Social-Dep	Active		11/09/1994	25
00210-C	Libby	Roy	Regular-Dep	Active		07/25/1995	25
00210-E	Will	Roy	Regular-Dep	Active		07/25/1995	25
00210-C	Rebecca	Colon	Regular-Dep	Active		12/22/1994	25
00234-C	Alexander	Alston	Regular-Dep	Active		09/08/1995	25
00332-C	Ryan	Booker	Regular-Dep	Active		07/08/1995	25
00464-C	Peter Ryan	Webb	Regular-Dep	Active			
00493-D	Georgia	Potter	Regular-Dep	Active			

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

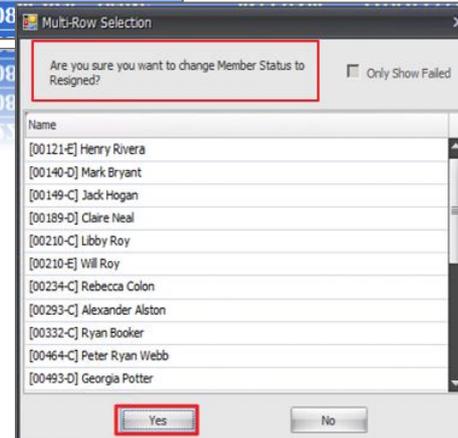


Multi Edit

Select a Column: Member Status

Specify a Value: Resigned

OK Cancel



Multi-Row Selection

Are you sure you want to change Member Status to Resigned? Only Show Failed

Name

- [00121-E] Henry Rivera
- [00140-D] Mark Bryant
- [00149-C] Jack Hogan
- [00189-D] Claire Neal
- [00210-C] Libby Roy
- [00210-E] Will Roy
- [00234-C] Rebecca Colon
- [00293-C] Alexander Alston
- [00332-C] Ryan Booker
- [00464-C] Peter Ryan Webb
- [00493-D] Georgia Potter

Yes No

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.

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

All the Selected Records now have a Resigned Status

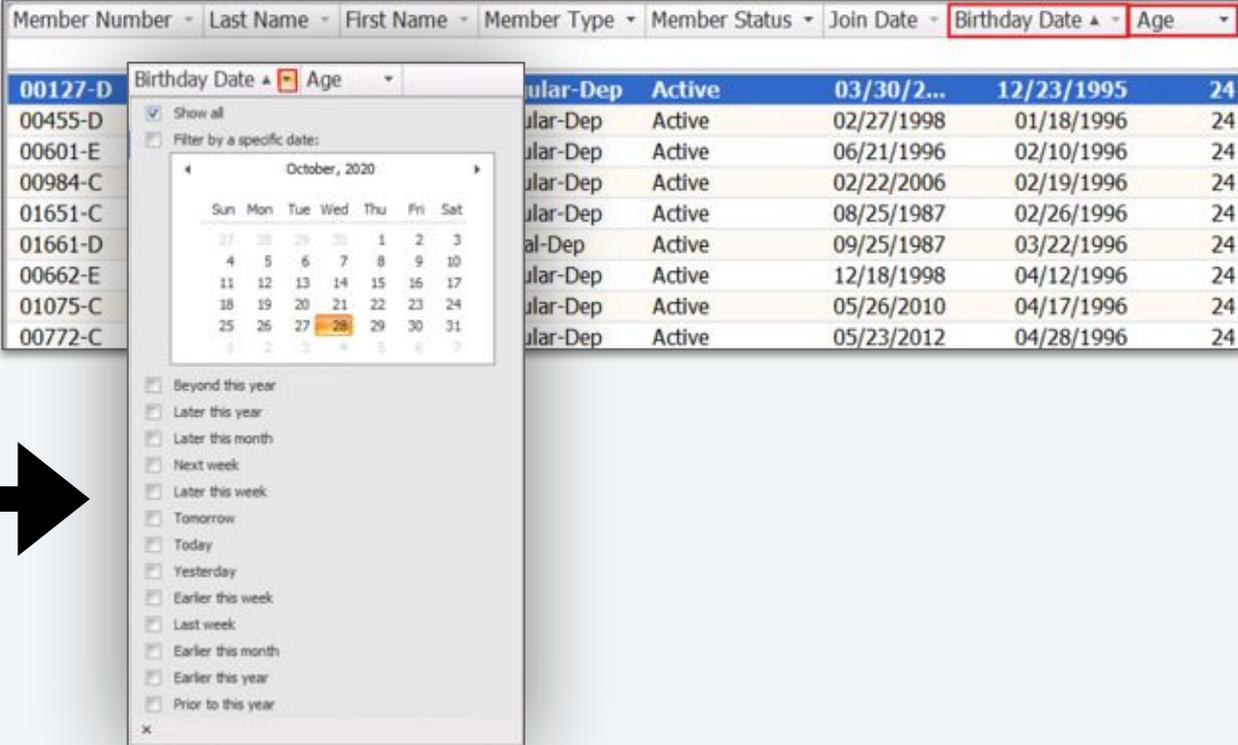
Member Number ▾	Last Name ▾	First Name ▾	Member Type ▾	Member Status ▾
00121-E	Rivera	Henry	Regular-Dep	Resigned
00140-D	Bryant	Mark	Regular-Dep	Resigned
00149-C	Hogan	Jack	Regular-Dep	Resigned
00189-D	Neal	Claire	Social-Dep	Resigned
00210-C	Roy	Libby	Regular-Dep	Resigned
00210-E	Roy	Will	Regular-Dep	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!**



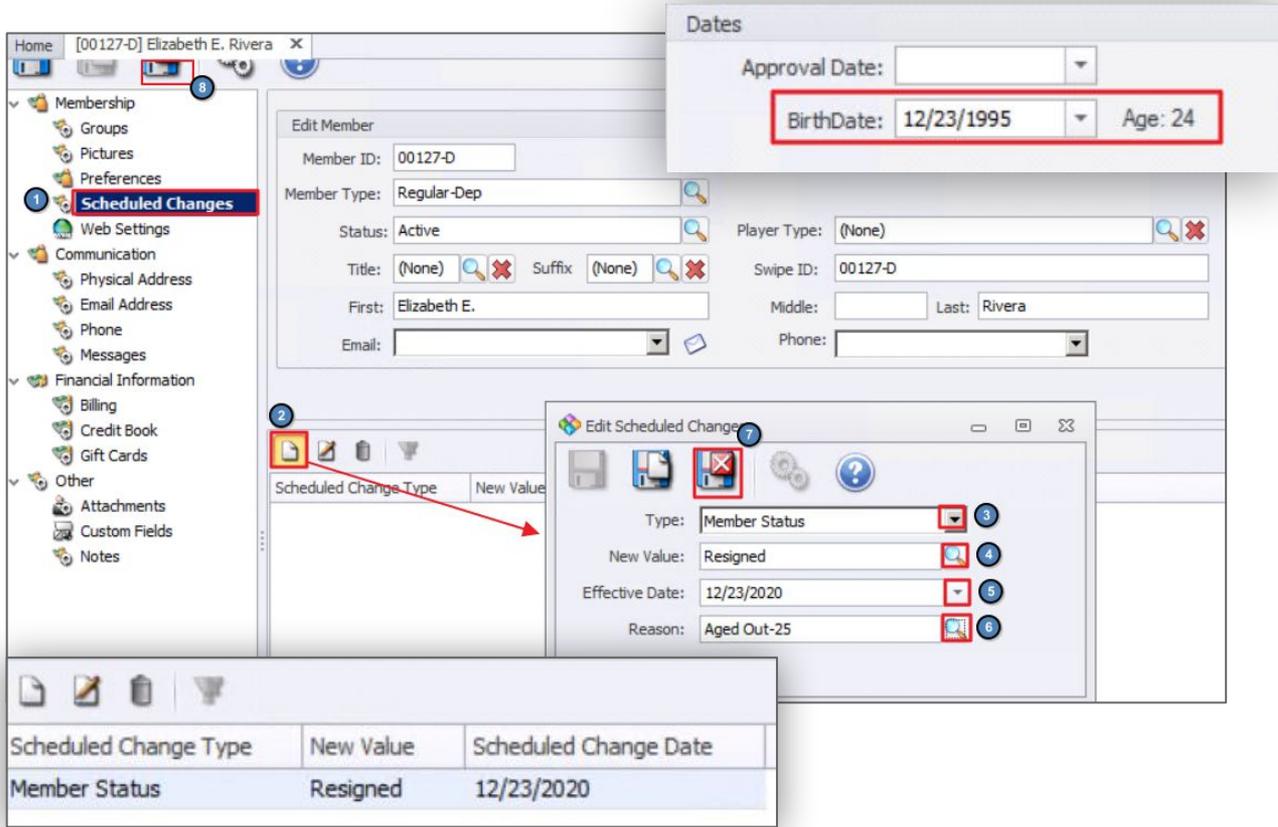
The screenshot displays a table with columns: Member Number, Last Name, First Name, Member Type, Member Status, Join Date, Birthday Date, and Age. The 'Age' column is highlighted in red. A dropdown menu is open over the 'Birthday Date' and 'Age' columns, showing a calendar for October 2020 with the 28th selected. Below the calendar is a list of filter options:

- Show all
- Filter by a specific date:
- Beyond this year
- Later this year
- Later this month
- Next week
- Later this week
- Tomorrow
- Today
- Yesterday
- Earlier this week
- Last week
- Earlier this month
- Earlier this year
- Prior to this year

The table data is as follows:

Member Number	Last Name	First Name	Member Type	Member Status	Join Date	Birthday Date	Age
00127-D			ular-Dep	Active	03/30/2...	12/23/1995	24
00455-D			ular-Dep	Active	02/27/1998	01/18/1996	24
00601-E			ular-Dep	Active	06/21/1996	02/10/1996	24
00984-C			ular-Dep	Active	02/22/2006	02/19/1996	24
01651-C			ular-Dep	Active	08/25/1987	02/26/1996	24
01661-D			al-Dep	Active	09/25/1987	03/22/1996	24
00662-E			ular-Dep	Active	12/18/1998	04/12/1996	24
01075-C			ular-Dep	Active	05/26/2010	04/17/1996	24
00772-C			ular-Dep	Active	05/23/2012	04/28/1996	24

Create New Scheduled Change



The screenshot illustrates the steps to create a new scheduled change for a member. The 'Edit Member' window shows the member's details, including their name, ID, and birth date. The 'Dates' dialog box is used to set the birth date and age. The 'Edit Scheduled Change' dialog box is used to specify the change type, new value, effective date, and reason. The final table shows the scheduled change details.

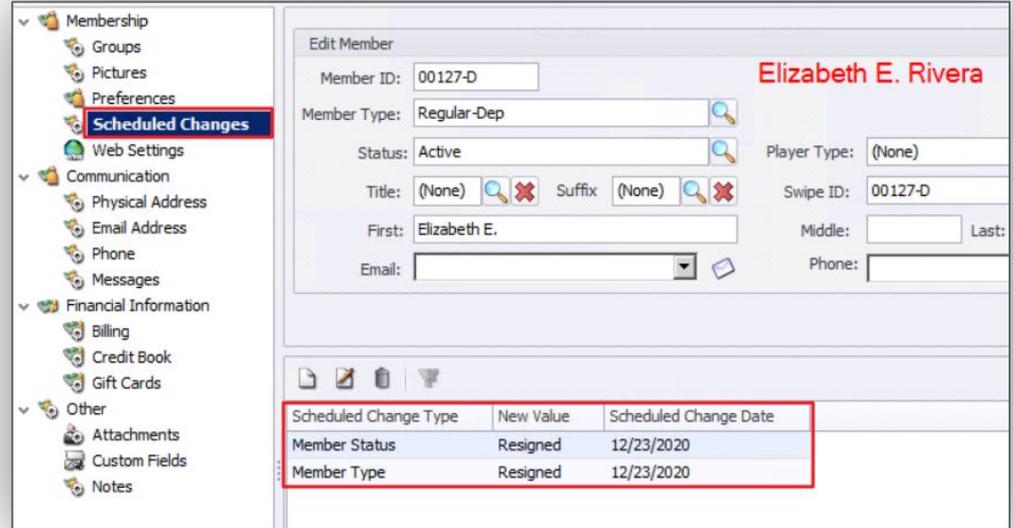
Scheduled Change Type	New Value	Scheduled Change Date
Member Status	Resigned	12/23/2020

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.

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.



The screenshot shows a web application interface for editing a member's profile. On the left is a navigation menu with categories like Membership, Communication, Financial Information, and Other. The 'Scheduled Changes' option is highlighted. The main area is titled 'Edit Member' and shows details for 'Elizabeth E. Rivera' (Member ID: 00127-D). Below the form is a table of scheduled changes.

Scheduled Change Type	New Value	Scheduled Change Date
Member Status	Resigned	12/23/2020
Member Type	Resigned	12/23/2020

Member Type Rules

The screenshot shows the 'Membership' tab in a software interface. A table lists member types with columns for Name, Visible On Web Roster, Is Spouse, Do Not Display Members On Member Grid, and Do Not Display Members In POS Lookup. The 'LS- Seasonal Spouse' row is highlighted in yellow. A red box highlights the 'Visible On Web Roster' and 'Do Not Display Members On Member Grid' columns. A search bar contains the text 'seasonal'.

Name	Visible On Web Roster	Is Spouse	Do Not Display Members On Member Grid	Do Not Display Members In POS Lookup
LS- Seasonal Spouse	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
LS-Seasonal	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seasonal Expired	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seasonal Membership	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

The configuration window for 'LS- Seasonal Spouse' shows various settings. The 'Is Spouse' checkbox is checked and highlighted with a red box. The 'Rules' tab is active, showing a list of rules with checkboxes.

Name: LS- Seasonal Spouse
Description: Las Sendas
Minimum Age: 0 Reciprocal Club Is Spouse
Maximum Age: 0 Tax Exempt
Event Class: Member Revenue Company: Clubessential Club
Golf Class: [Dropdown]
Rules:
 Do Not Display Members on Member Grid
 Do Not Display Members in POS Lookup
 Use Member Pricing
 Restrict Web Login
 Visible on Web Roster

Items to Review:

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

Status Definitions

Home

New Edit Delete Export Refresh Clear Filter

Name	Web Roster Visible
Active	1
Suspended	0
Resigned	0
Inactive	0
LOA	0
Guest Room	1

Status Definitions

Home Active

Name: Active

Description: Active

Rules

- Do Not Allow Member Charge Privileges
- Do Not Allow POS Usage
- Do Not Process Billing
- Do Not Process Minimums
- Restrict Web Login
- Visible on Web Roster

Member Status Rules

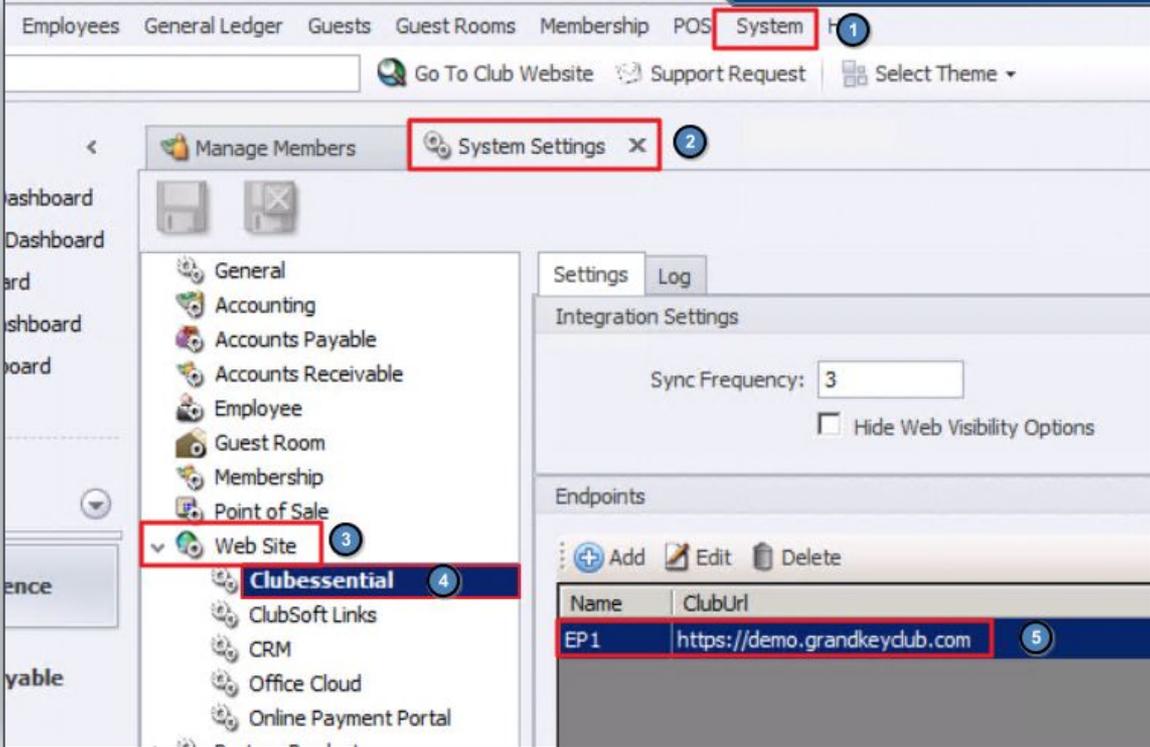
Just like a Member Type, Rules can be applied to a Member Status that affect Billing, POS, Minimums and Web Visibility.

Unification Reminders

Review Sync Configuration and Groups

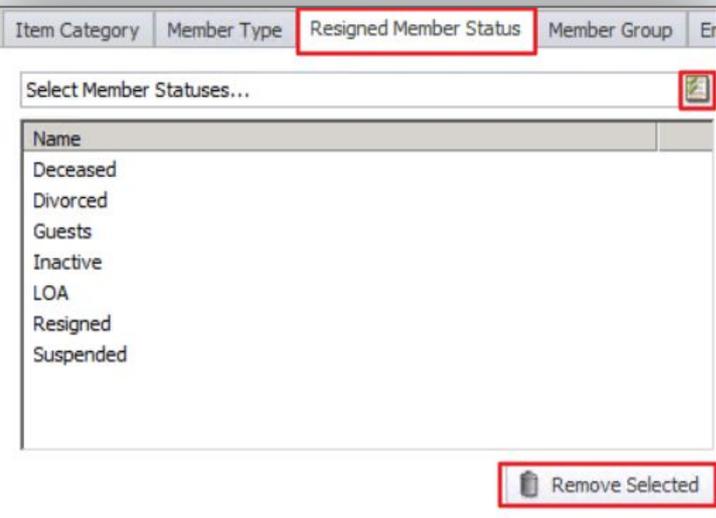
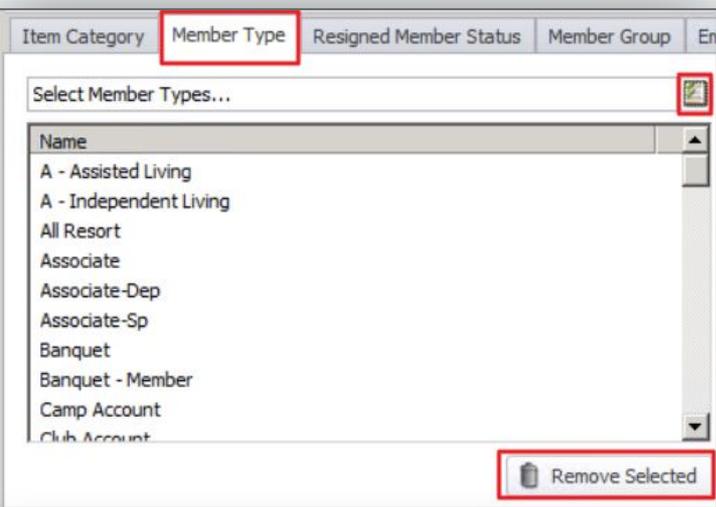
Access Unification Settings

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.



The screenshot shows the Clubessential software interface. The top navigation bar includes 'System' (1). Below it, the 'System Settings' tab is selected (2). In the left sidebar, the 'Web Site' category is expanded (3), and 'Clubessential' is selected (4). On the right, the 'Integration Settings' section shows a table of endpoints. The 'ClubUrl' for 'EP1' is highlighted in blue (5).

Name	ClubUrl
EP1	https://demo.grandkeyclub.com



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.

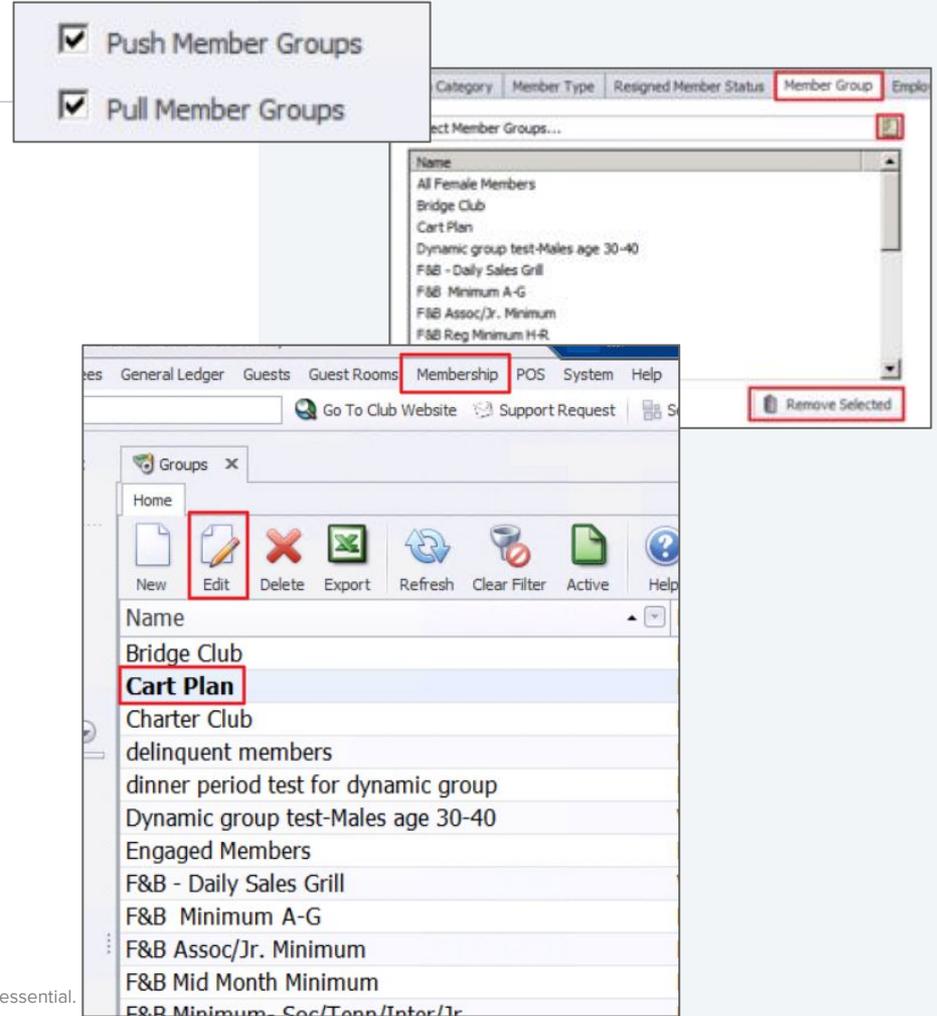
On the **Member Status** tab, review that no changes are needed to indicate which office status' will make a member inactive on the web.

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**.



The screenshot displays the software interface for managing groups. At the top, a settings panel shows two checked options: **Push Member Groups** and **Pull Member Groups**. Below this, a window titled "Select Member Groups..." lists various group names, including "All Female Members", "Bridge Club", "Cart Plan", "Dynamic group test-Males age 30-40", "F&B - Daily Sales Grill", "F&B Minimum A-G", "F&B Assoc./Jr. Minimum", and "F&B Reg Minimum H-R". The "Member Group" column header is highlighted with a red box. In the main application window, the "Membership" menu item is highlighted with a red box. Below the menu, a toolbar contains icons for "New", "Edit", "Delete", "Export", "Refresh", "Clear Filter", "Active", and "Help". The "Edit" icon is highlighted with a red box. The main list of groups is visible, with "Cart Plan" highlighted and its name also highlighted with a red box. A "Remove Selected" button is visible in the bottom right corner of the list area.

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.

Web Access	Regular
Staff	Regular
Staff	New-Hire
Staff	
Web Access	Regular
Staff	
Staff	New-Hire
Full-Time	Regular
Full-Time	Regular
Web Access	Regular
Staff	Regular
Full-Time	
Web Access	Regular

Q&A

