Membership Management

2016 - Fall Edition

User Guide - Table of Contents

Overview

A Club builds new Members in their system as they join the Club to ensure they can communicate with them effectively, manage their billings and related payments, and include them in Club offerings such as the Club Website, Reservations system, POS System, and the Club App.

Use Case(s)

A new Member joined the Club today. He would like to be set up with access to view the Club's website. He would also like to be a part of the Men's Golf Group, and would like to pay his club dues via ACH. The Membership Director ensures the new Member's information is input into the Clubessential Office system to facilitate Club communication, billing, and other Club offerings.

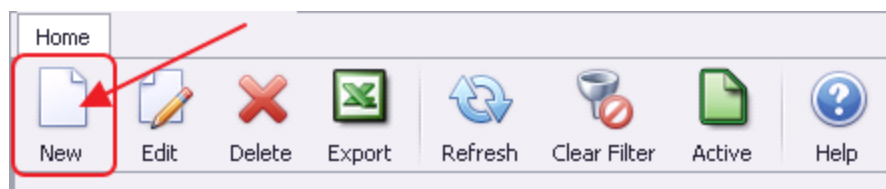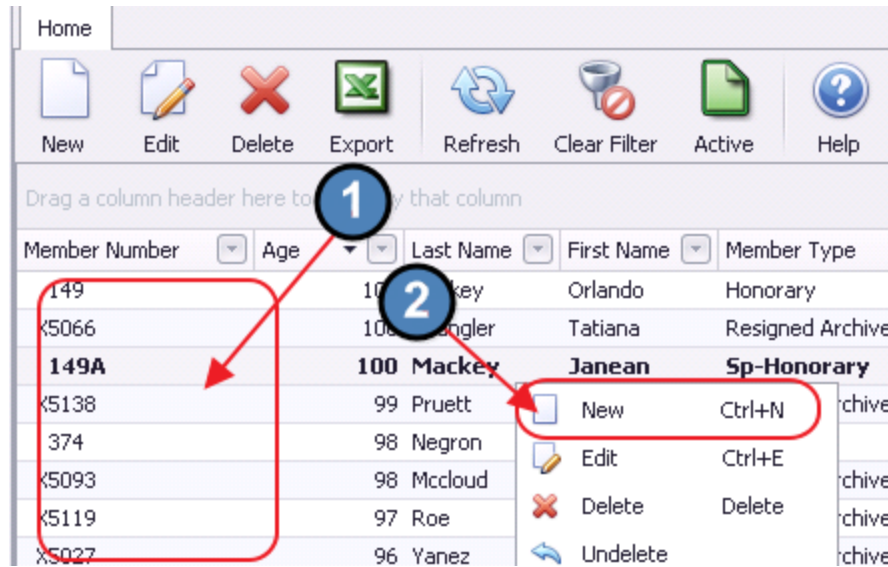# Accessing the Tool

To access the **New Member Wizard,**

1) Click on **Membership** to load the **Manage Members Grid.**
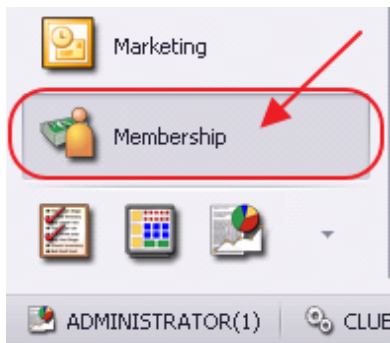
2) Then, perform either of the following to launch the **New Member Wizard**:
   a) Click the **New** icon on the toolbar.

b) Right-click anywhere on the **Manage Members Grid** and select **New**.

New Member Wizard

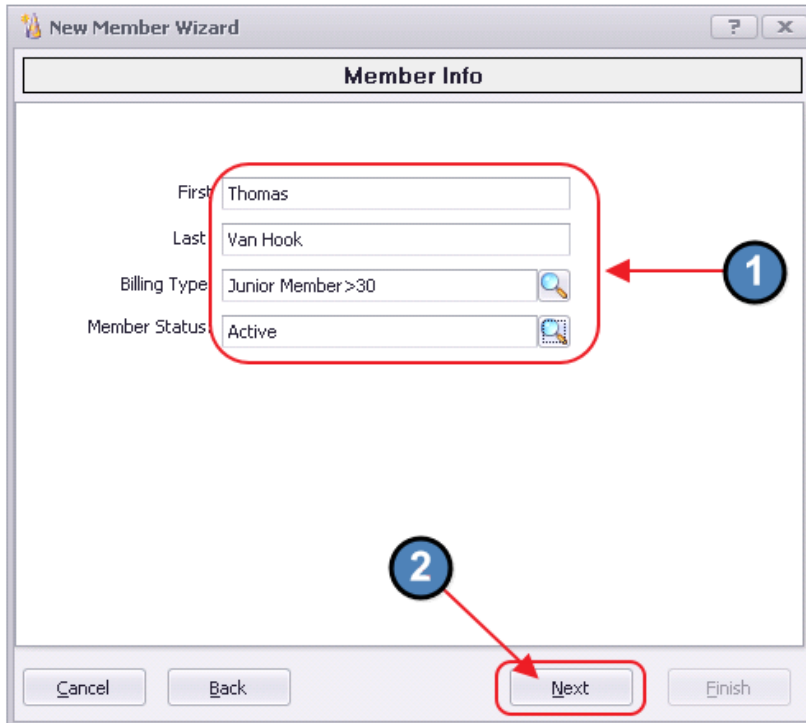The New Member Wizard is designed to assist with the creation of a New Member.

Click **Next** to proceed through the wizard.

Member Info Fields

Follow prompts to enter **First Name** (optional), **Last Name** (or full account description if Party, Reciprocal Club, etc.), **Billing Type** (Member Type), and **Member Status**.

Click **Next** to proceed.

Member Groups

- Every account **must** be included in at least one **Member Group**, primarily for reporting purposes. For this reason, most will have a group called **Reporting Group** or **All Accounts.**
- If **Minimums** are used, **Primary Accounts** ONLY will need to be linked to the proper **Minimum Group**.
- Select any other applicable groups as needed.

Click **Next** to proceed.
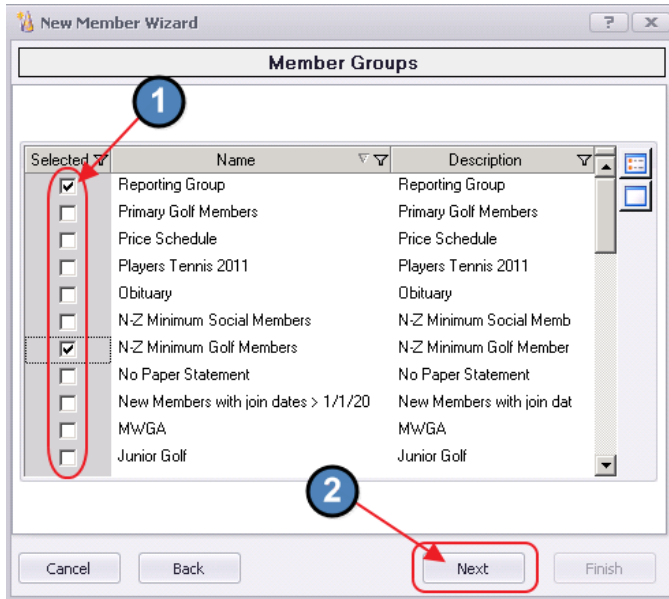
Member Dependency

- Check **Is Member a Dependent/Spouse** IF account being created is to be linked to another account for billing purposes.
- **IF** this box **IS CHECKED**, then complete the empty box below to designate the account to which this Member should be linked.
- Most Dependents will use the same **Address** as the Primary Member. If this is the case, check **Use Primary Member Address**.

Click **Next** to proceed.
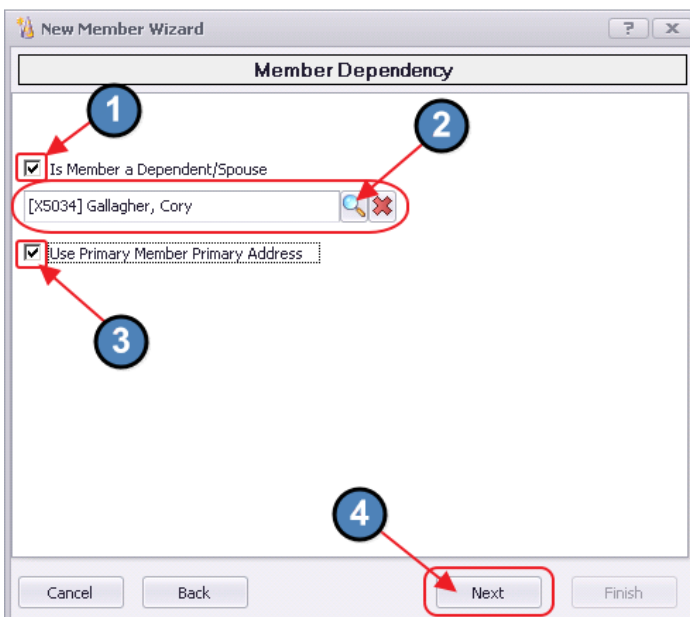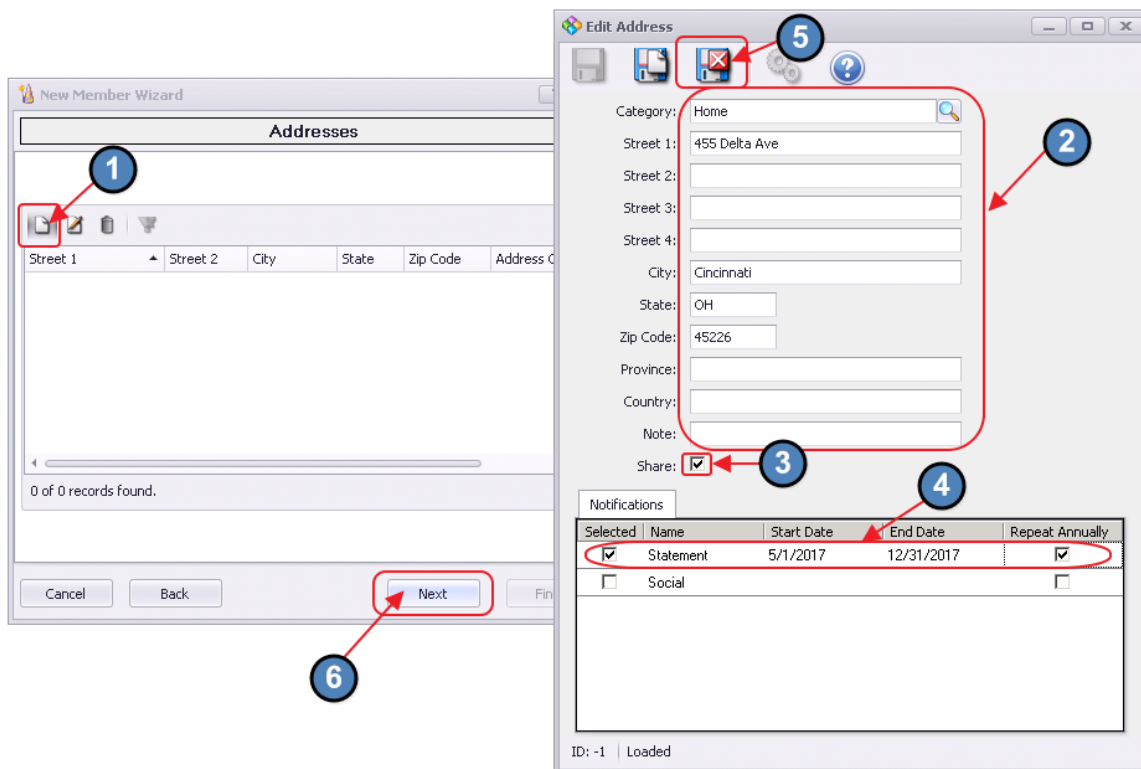
Addresses/Contact Info

Enter a new Physical Address by selecting the **New** icon. (**Note** this step is optional and can be completed at a later time if desired).

- Enter all applicable address information.
- Check **Share** if address will also apply to spouse and dependents.
- Select **Notifications** if notifications are to be sent to this address.

  If **Statement** is selected, then a paper statement will be printed for this account. If not selected, then an email statement will need to be sent. Note, if the physical address applies only for a designated time period (for instance the Member will live in one residence for 7 months, and another for 5 months), designate the appropriate **Start** and **End Dates** that the address will apply for the Member. If the Member has this schedule every year, click the **Repeat Annually** button. Leaving these fields blank will designate that this address applies for the whole year.

- Click **Save and Close** when complete. Add additional addresses as required.

When finished, click **Next** to proceed.

Emails

Enter a new Email Address by selecting the **New** icon. (**Note** this step is also optional and can be completed at a later time if desired).
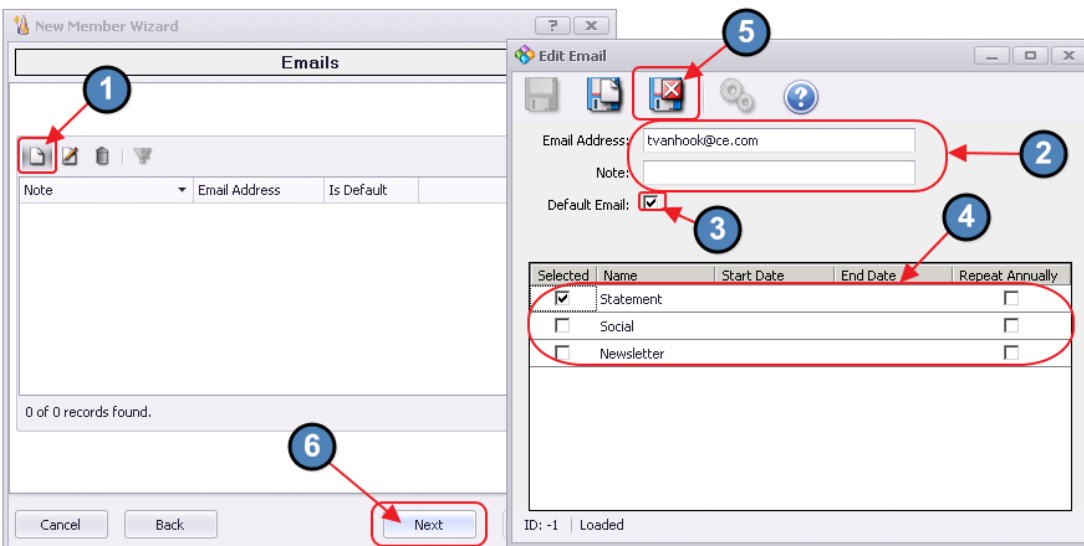
- Enter the Email Address and add a Note if desired.
- **Default** will be checked for the first email address entered. This can be changed; however, one email address must be marked as the **Default**, as it will predominantly be used when sending emails through Office.
- Select **Notifications** as needed.

  If **Statement** is checked, an electronic statement will be sent for to this email address. (**Note**: A **Spouse** Account can also receive a copy of the Primary Member's emailed statement. To do so, check **Statement** on the appropriate email address within the **Spouse's Member account**. When statement emails are sent, the **Spouse** will receive the same email as the **Primary** Member. Dependents other than Member's Spouse cannot receive an emailed statement.)

  Note, if the email address applies only for a designated time period, designate the appropriate **Start** and **End Dates** that the email address will apply for the Member. If the Member has this schedule every year, click the **Repeat Annually** button. Leaving these fields blank will designate that this email address applies for the whole year.

- Click **Save and Close** when complete. Add additional email addresses as required.

When finished, click **Next** to proceed.

Phone Numbers

Enter a new Phone Number by selecting the **New** icon. (**Note** this step is also optional and can be completed at a later time if desired).

- Enter the Phone Number, Carrier, Phone Type, and add a Note if desired.

  If **Mobile** is selected, be sure to specify the **Carrier**. To send **text messages** to Members through Office, please see Marketing Wizard document.

- **Default** will be checked for the first Phone Number entered. This can be changed; however, one number must be marked as the **Default**, as it will predominantly be used for communication purposes.
- Select **Notifications** as needed.

  Note, if the phone number applies only for a designated time period, designate the appropriate **Start** and **End Dates** that the email address will apply for the Member. If the Member has this schedule every year, click the **Repeat Annually** button. Leaving these fields blank will designate that this phone number applies for the whole year.

- Click **Save and Close** when complete. Add additional phone numbers as required.
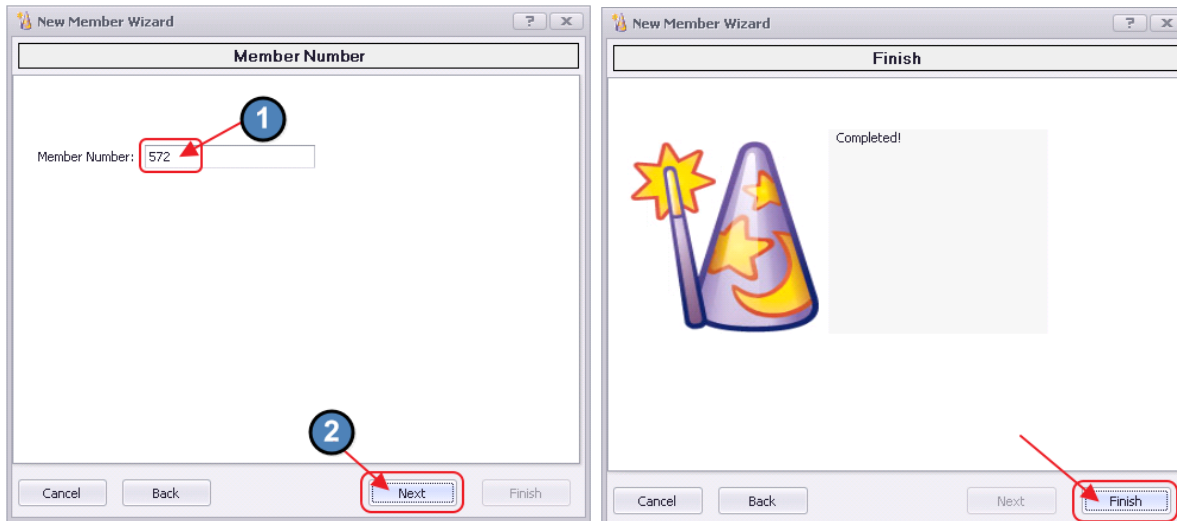
When finished, click **Next** to proceed.
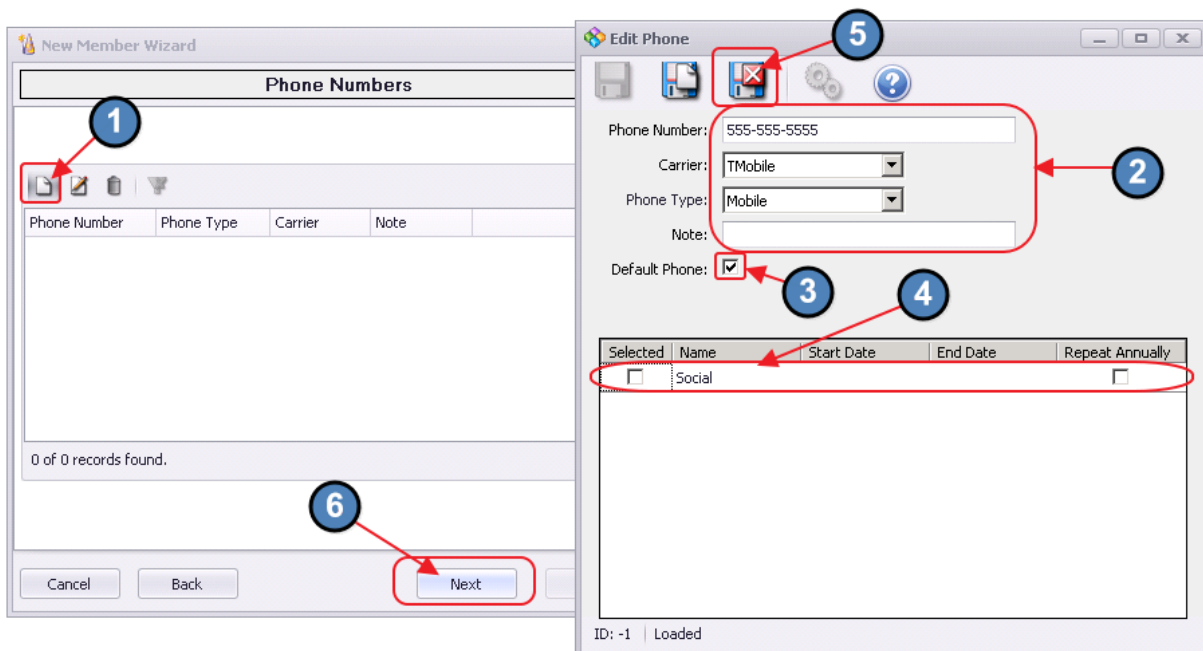
Member Number

Enter Member Number. If Member is Spouse or Dependent, be sure to include proper suffix (ie -1 or -A).

When finished, click **Next** to proceed, and **Finish** to confirm completion.

Additional Tabs for Member Info

Once New Member Wizard is complete, the New Member Account is displayed and available for further editing.

Membership Section

The Membership Section contains an opportunity to populate additional information about the Member. For instance the following fields can be found on the **Membership** tab.

- *Names*
    - Alternate Names/Titles
    - These fields are primarily utilized when printing **Membership Address Labels.** For instance, if **Family Title** is the selected **Display Name** when printing labels, **Family Title** must be entered for the label to print properly.
    - **Statement Name** can be used to override the name that appears on the statement (ie - Mr. and Mrs. John Smith). If left blank, the first and last name of the Primary Member will appear on the statement.

- *Dates*
  - **Approval Date, Birth date, Join Date and Wedding Date** can be entered for new members. (Initiation fee can be entered in amount field to the right of Join Date).

    Note: For Clubessential/Axis Website users, IF Join Date is utilized, remember to set this to a date less than or equal to the present date. Otherwise, the Member will not show on the Website Roster. If Join Date is blank, the system knows to add the Member to the Roster as normal.

- *Miscellaneous*
  - **Gender** - Specify Gender of the Member
  - **Profession** (Optional) - Enter the Member's profession
  - **Member URL 1** (Optional) - Enter the Member's social site URL
  - **Pin** (Optional) - Only applicable when **Kiosk Mode** is utilized
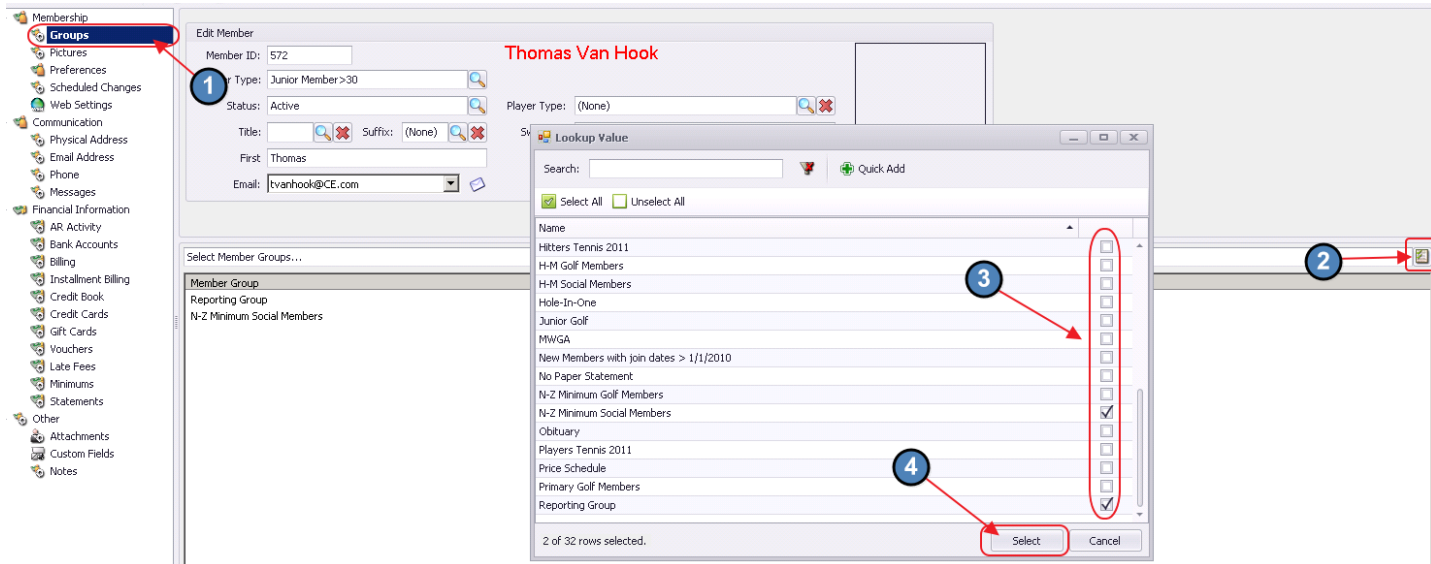
- **Spouse**
  - **After the Spouse Account is created**, return to the Primary Member's Account. As long as the Spouse Member is in a Member Type marked as **Is Spouse** (Please see **Member Type** help documentation), the system will automatically populate the Spouse Member in this field. Spouses, however, can also be manually added to this field.

  - **Note**: For Clubessential/Axis Website users, for the Spouse Member to show with a Spouse/Secondary Relationship level, they must be entered into this field. Otherwise, the Spouse will show with a Child/Additional Relationship level.

Other Tabs available within the Membership section allow for further data gathering and Member establishment.

Groups Tab

Use this tab to add a Member to a Group not previously assigned in the Wizard, or to Delete a Member from a previously assigned Group.

Pictures Tab

Use this tab to add a Member's Picture to their profile.
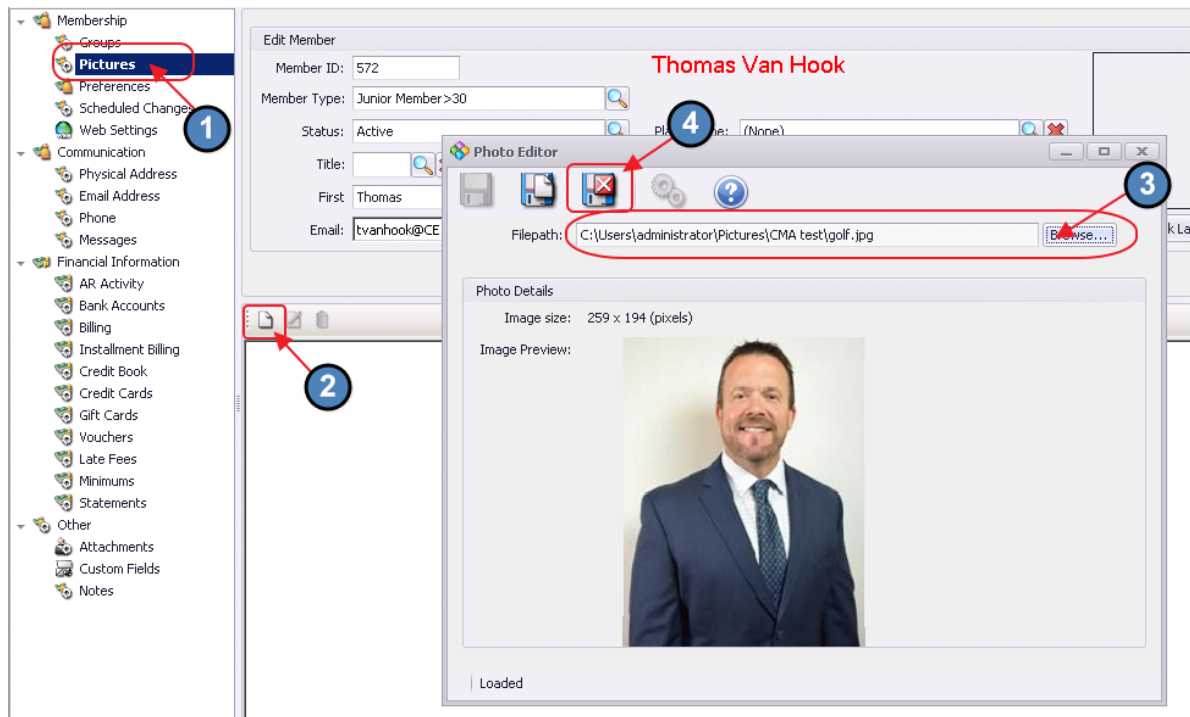
Preferences

Use this tab to add a Member's Preferences. Choose a Category, describe the Preference, and click **Save.**
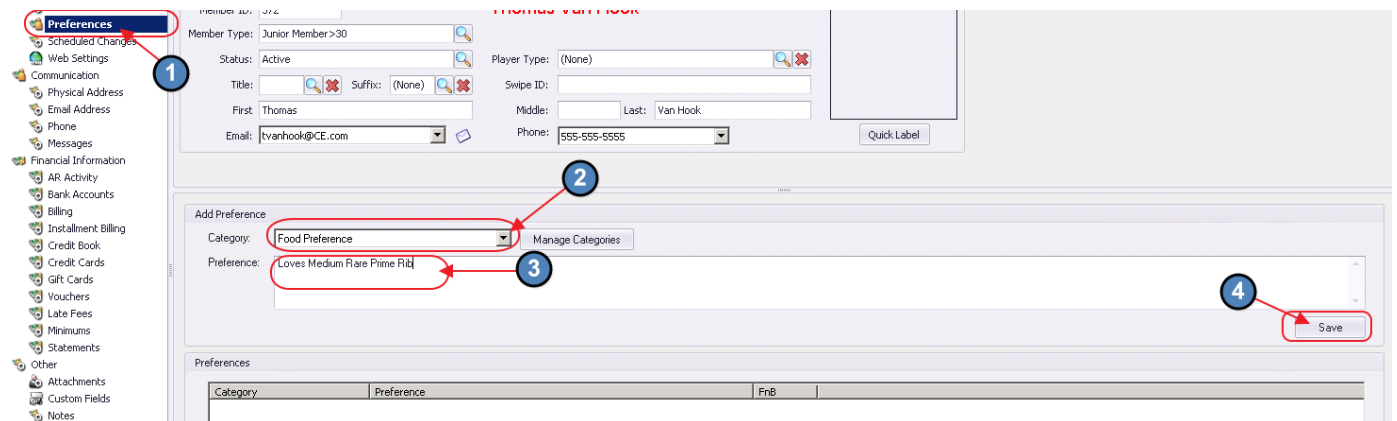
Scheduled Changes

Use this tab to add a Scheduled Change of **Member Type** or **Member Status**, when the date is known and in the future.   Specify the Type of Change to occur. Indicate the new value, its effective date, and provide a reason.
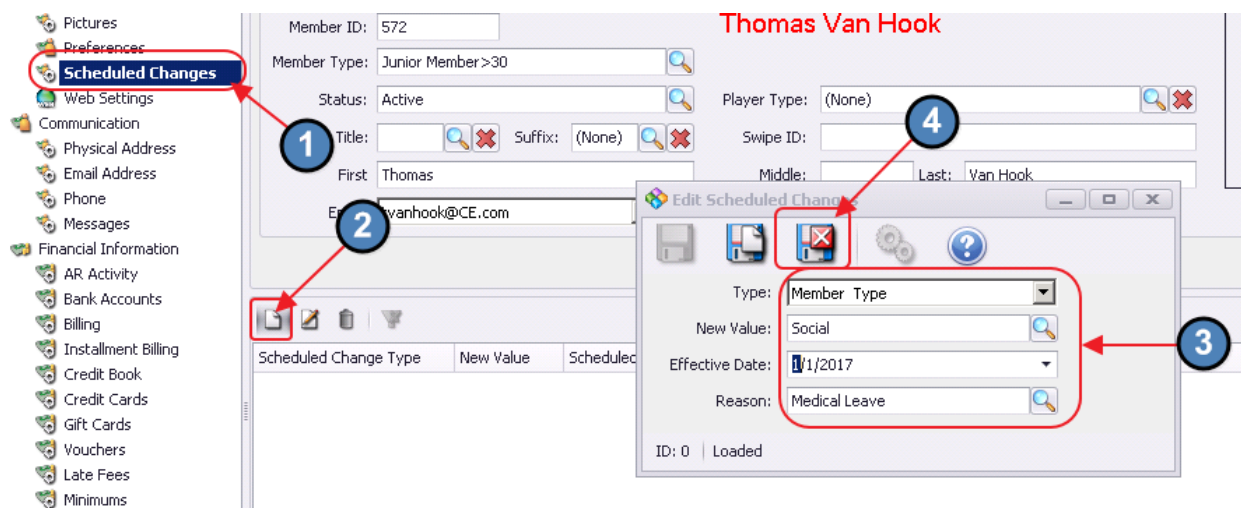

Web Settings

This section is **ONLY** for **Clubsoft Links** or **Classic CSWEB** website users.

If a **Clubessential/Axis Website** is used, these fields should **NOT** be entered.

- **Username** - Needed for Website Access (must be a unique value)
- **Password** - Enter password to be used when accessing website
- **Visible on Web Roster** - Must be checked for Member to show correctly on Web Roster.
- **Restrict Web Login** - If checked, the Member will not be able to log in to the Website.
- **Elevated Spouse Privileges** - Optional box that allows spouse to also see financial info on web.
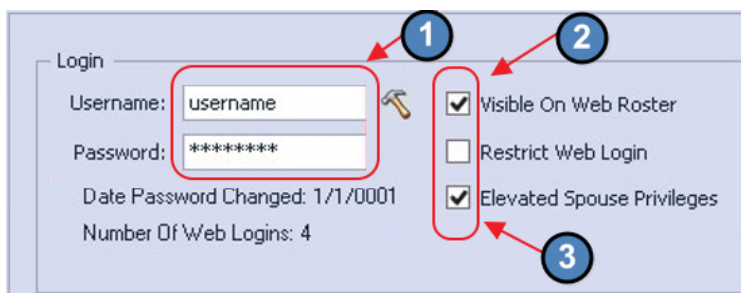
Communication Section

If Physical Address/Email, or Phone numbers were not populated previously in the Wizard, they can be added in the **Communication** section. Click on the desired tab and populate information as previously demonstrated.
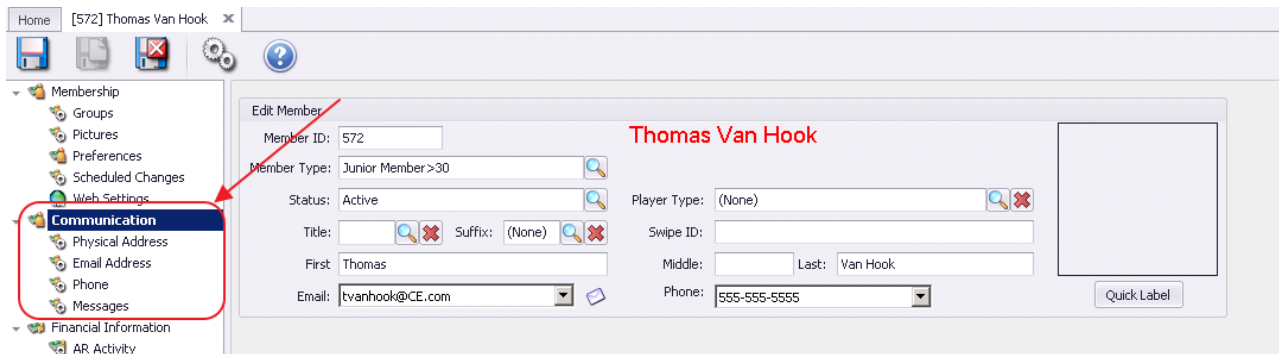
Financial Information Section

If Member is a **Spouse or Dependent**:

VERIFY **Billing Member** is correctly linked to the **Primary Member**.

Note: Click **Edit** (next to Billing Member) to open Billing Member's edit screen.
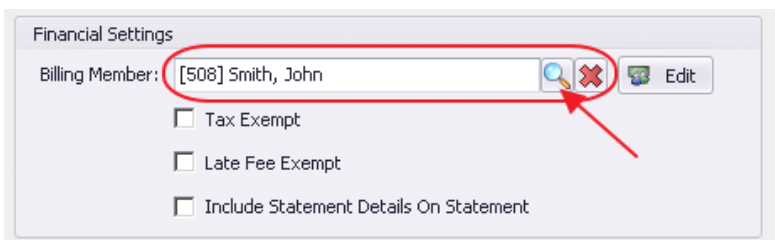
IF Member is **Primary**:

VERIFY **Billing Member** is set to **None**.
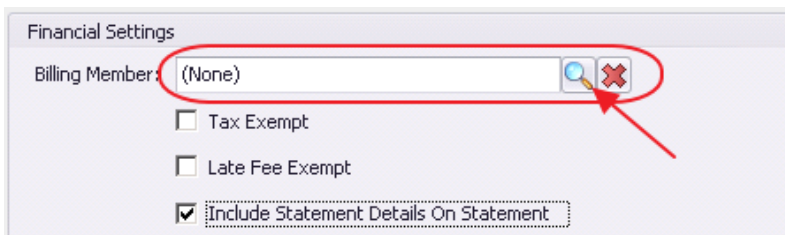
- **Tax Exempt** - Check, if Member should not be charged tax.
- **Late Fee Exempt** - Check, if Member should be exempt from **Late Fees**.
- **Include Statement Details On Statement** - Check, if Member should receive miniature copies of their chits with the printed or emailed statement.
- **Credit Comments** - Enter free-form comments as desired.

A/R Activity

Use this tab to review Member Accounts Receivable/Payment History. This is a view-only tab for Billing/Primary Members. Options exist to view Dependent Activity, define time periods and statements, and to specify A/R Ledger. Direct links to the Member Aging Report as well as the Member's Payment report are available at the bottom. Double-click on a line-item in the Grid to gain additional details of the charge.

Bank Accounts

Add Banking info on this tab if ACH payments are applicable. Click the New Icon to add a bank account. Click **OK** to move forward without specifying a token. Complete Member Bank Account Information, and click **Save and Close**.
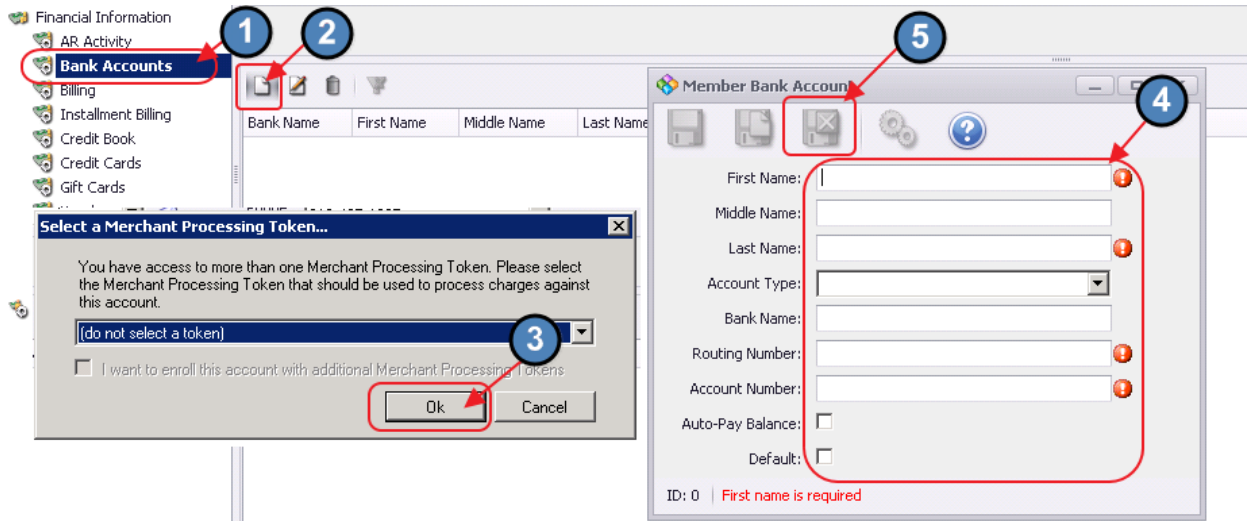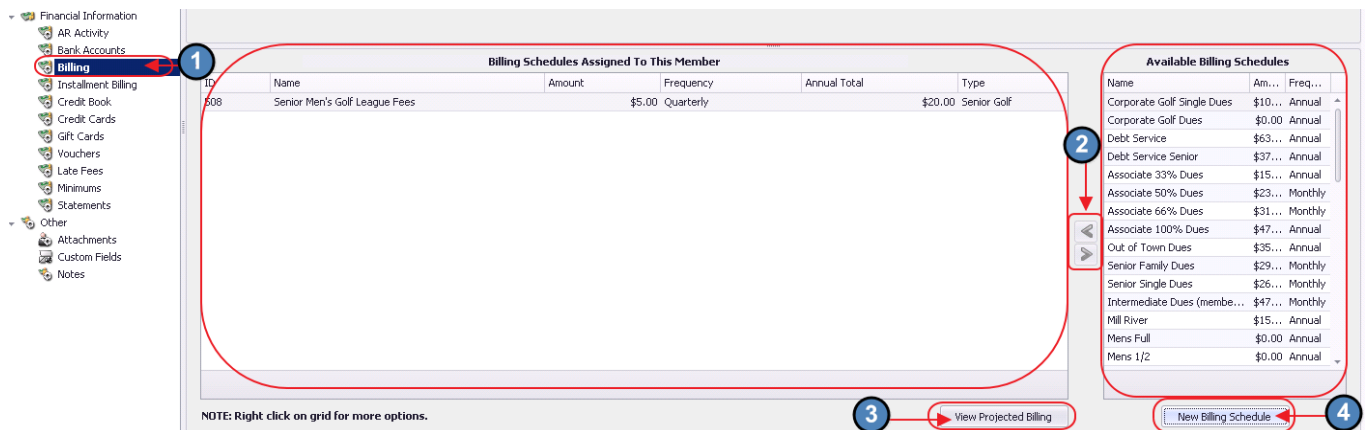

Credit Cards

Add Credit Card info on this tab if credit card payments are applicable. Click the New Icon to add a Credit Card. Click **OK** to move forward without specifying a token. Complete Member Credit Card Information, and click **Save and Close**.
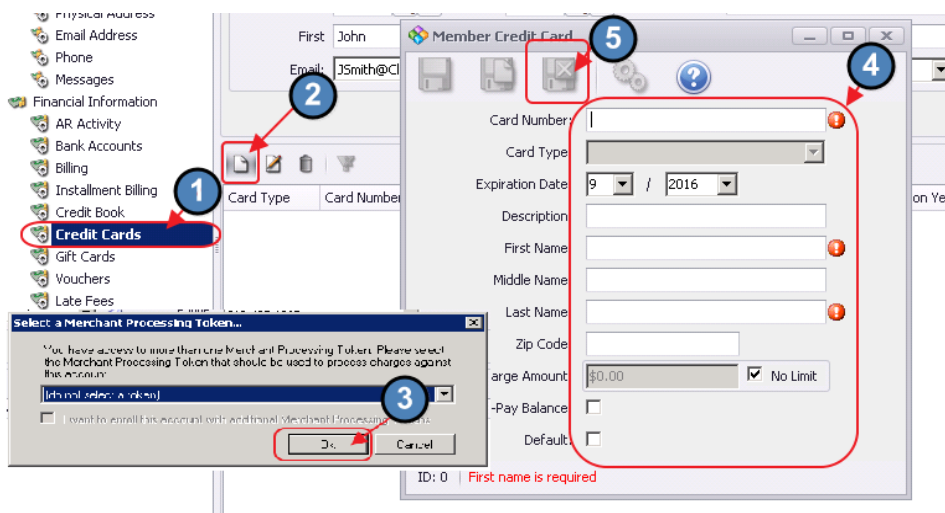
Billing

The Billing Tab contains a summary of the Billing Schedules attached to the Member. While it is most efficient and effective to add **Billing Schedules** at the **Member Group** and **Member Type** level, it is possible to add and delete Billing Schedules specific to the Member on this tab. Assigned Billing Schedules are on the left. Available Billing schedules are on the right. Assign a schedule by selecting an Available schedule and clicking on the Left Arrow. Conversely, to un-assign a schedule, click on the Assigned schedule, and then click the Right Arrow. (**Note**: The un-assign function applies only to the Billing Schedules assigned at the Member level, and will not work for those assigned at the Member Group or Member Type level.) Click on the Projected Billing Report to view billings projected for the future based on the schedules. Additionally, click the **New Billing Schedule** button to create a new schedule for the Available list.

Installment Billing

In addition to Billing Schedules, Installment Billings can also be viewed, and built from the Installment Billing tab. To create a new Installment Billing, click the **New** button. Define the Installment Billing parameters. Note the Adjustments tab can be utilized to create billing adjustments. Click **Save and Close** when setup is complete.
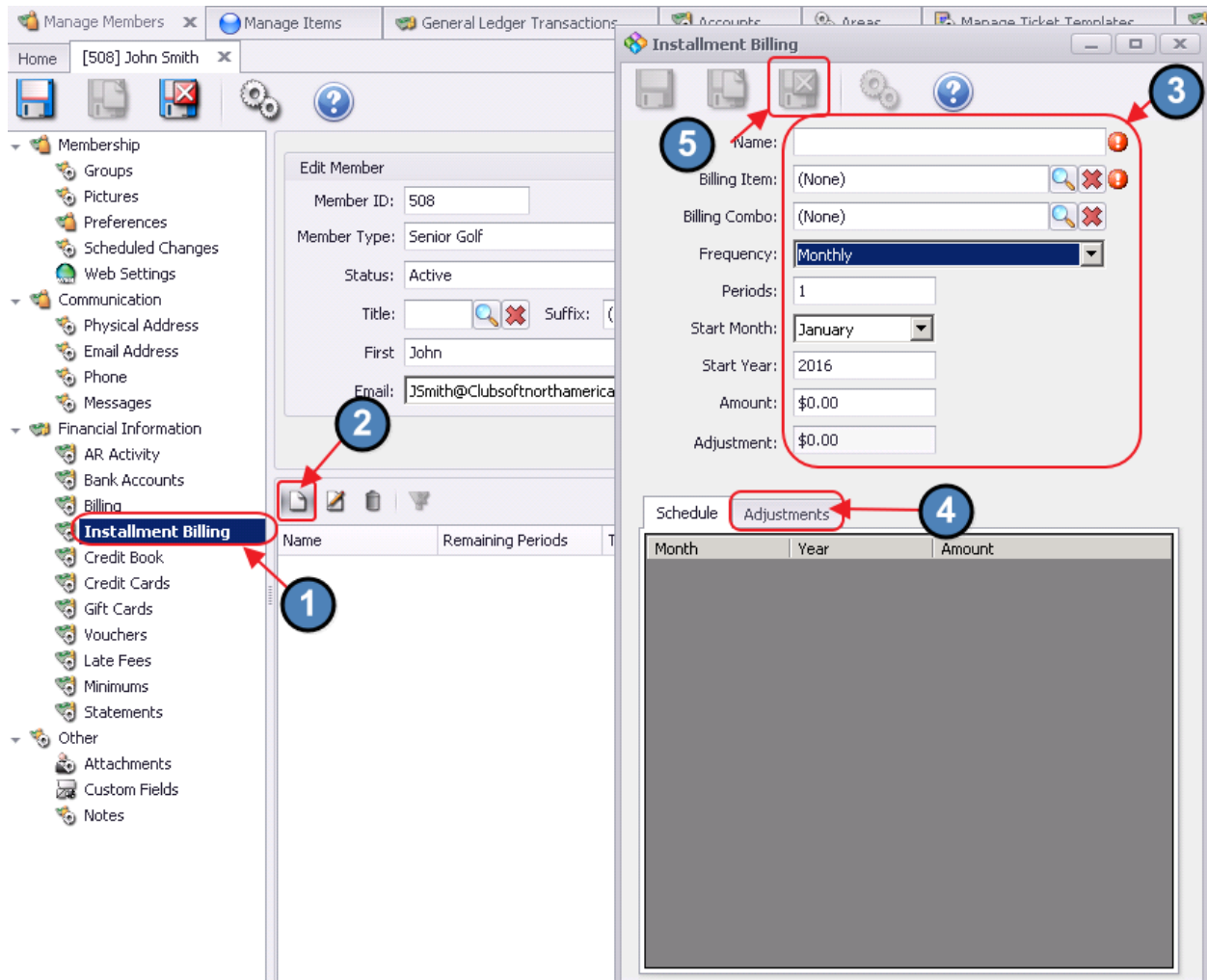
Credit Book/Gift Cards/Vouchers/Statements

These tabs are view-only tabs with information relevant to the Member's Credit Book, Gift Card, Voucher balances, and Statements.

Late Fees

To view and/or assign **Late Fees** to a Member, click the **Late Fees** tab. The Member Specific Late Fees can be viewed in the top grid. To apply a late fee to the Member, check the box in the Selected column. To apply all, click the icon to the right of the grid with the list in it. To unapply all, click the blank icon.

Late Fees based on the Member's type will display in the lower grid.
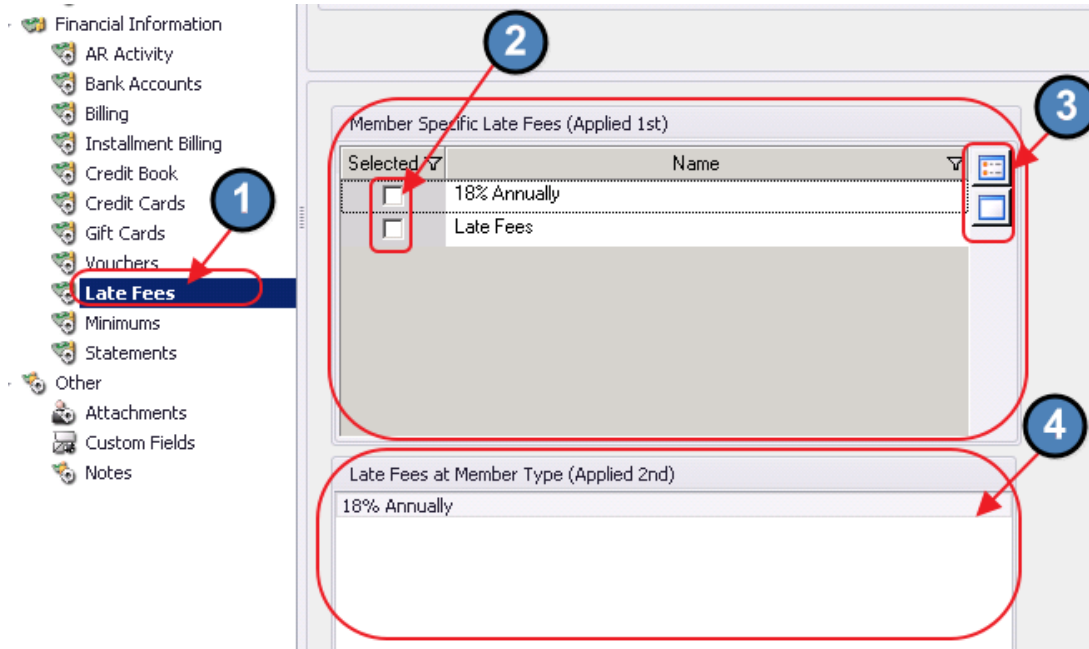
Minimums

To establish a Member's Minimum spending requirements, click on the **Minimums** tab. Complete the Details of the Minimum. Click **View Minimum Activity** button to view the Member Minimum Activity Report, containing the details of the Minimum to Spend, Minimum Spent details, and the Unspent amount.
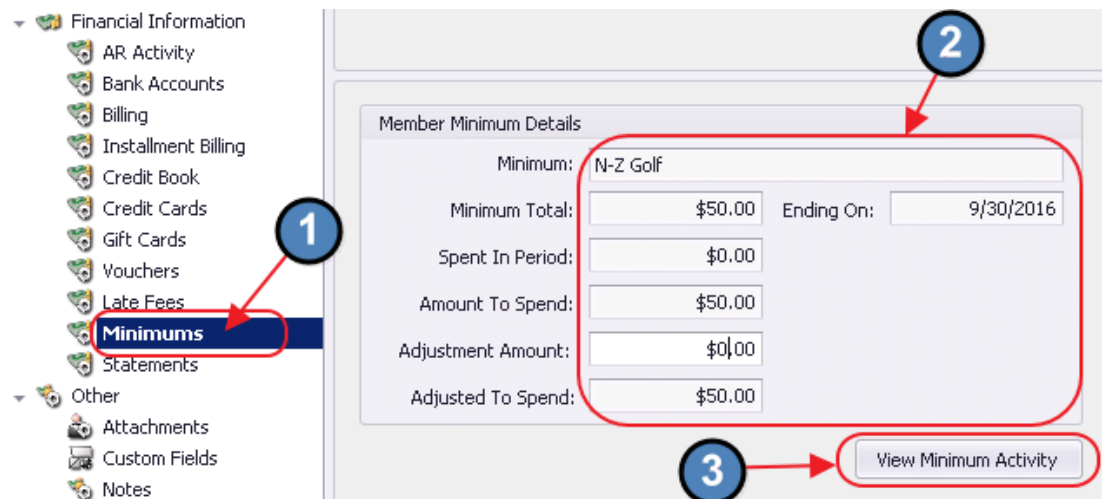
Other Information Section

Attachments

The attachments tab allows for document attachment to a Member's file. To attach a new document (such as the Member's Membership application), click the Attachments tab, click the **New** icon, complete the Attachment Editor screen, and click **Save and Close**.
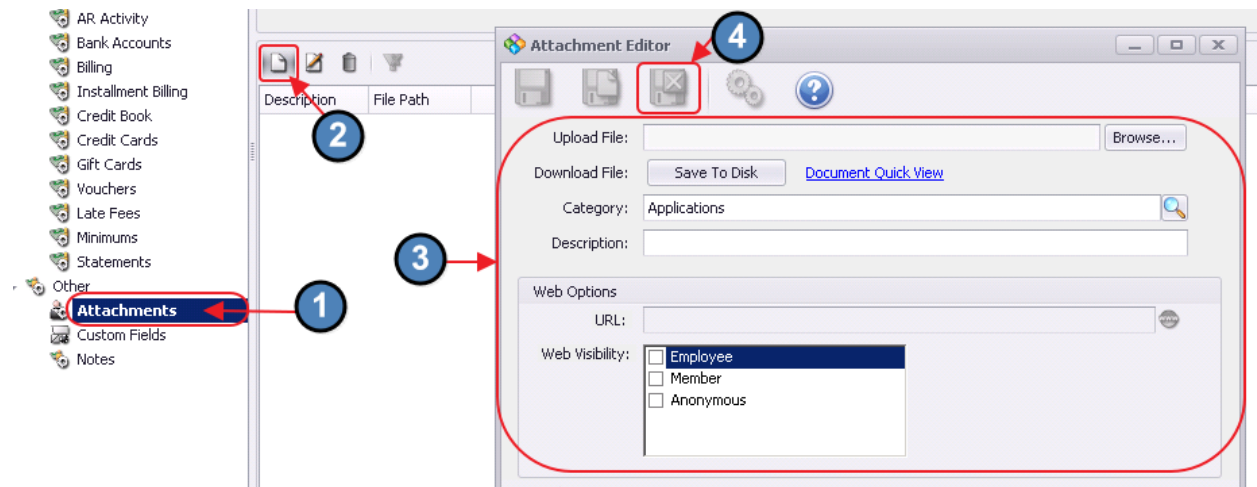

Custom Fields

Click on the Custom Fields tab to populate additional data regarding the Member. These Club defined fields allow a Club to capture additional items such as the Member's Profession, Education level, Boat Name, Hobbies, etc.
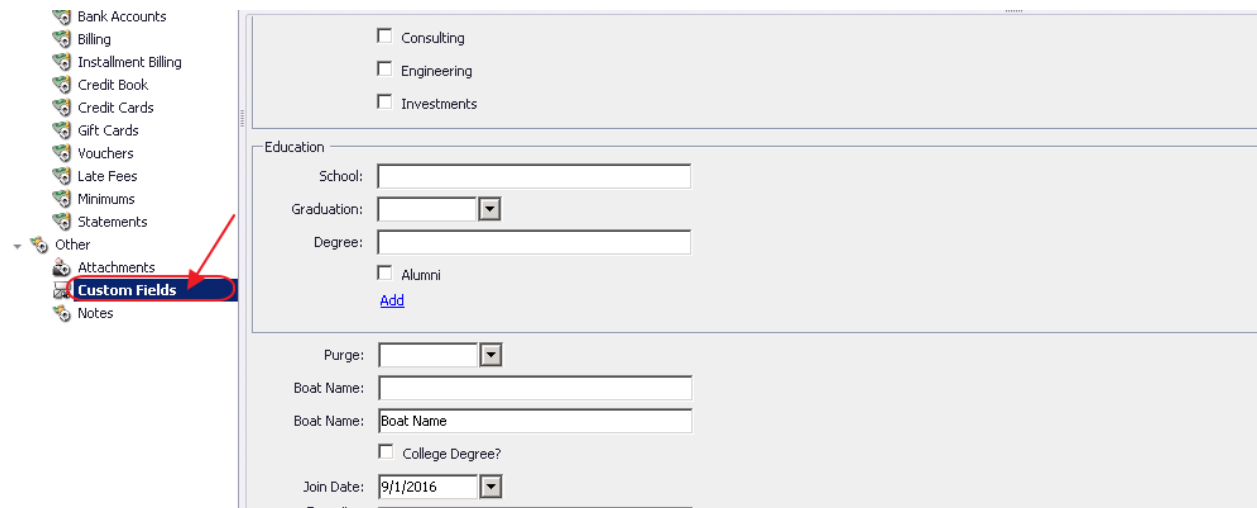
Notes

The Notes tab allows for additional free-form notes to be put on a Member's Account. To attach a note, click on the **Notes** tab, click the **New** icon, enter a Name and Category for the note, type/format the note, and click **Save and Close** when complete.
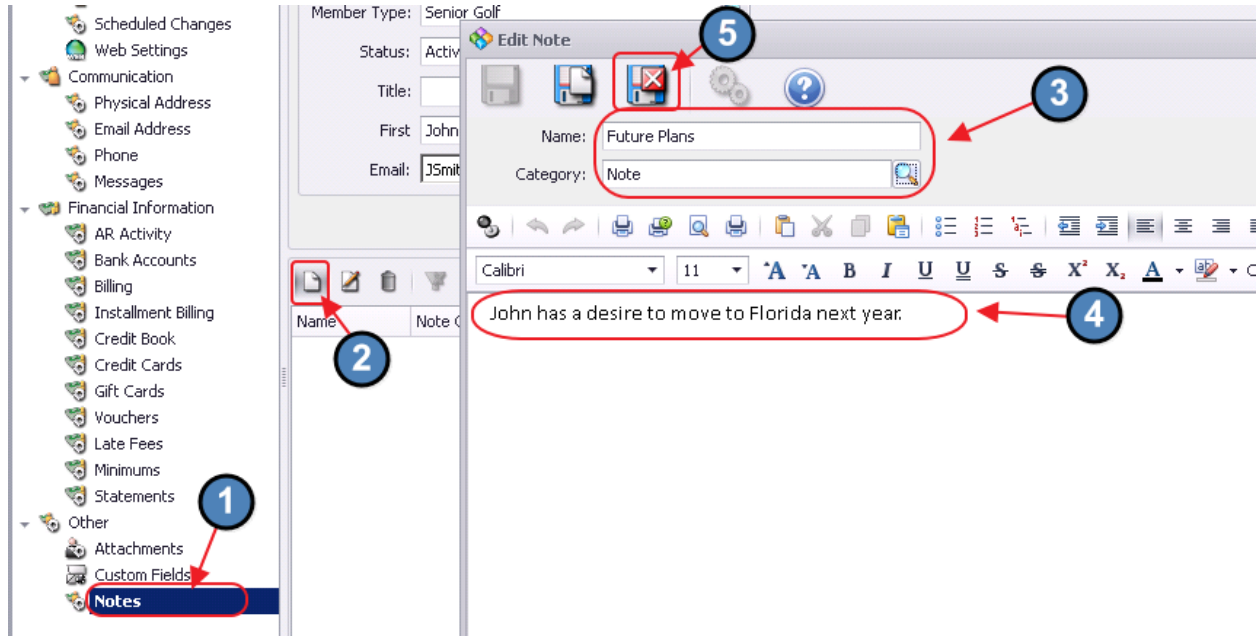
Save and Close

Once changes/updates are complete, click **Save and Close** in the main heading area to save all changes/edits to the Member.
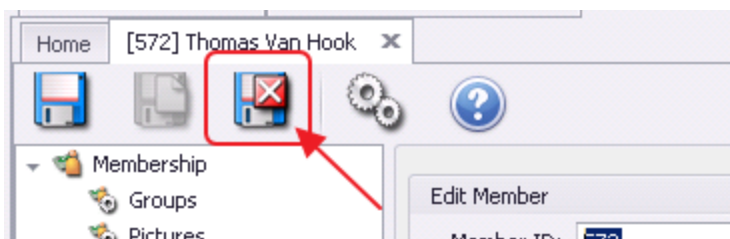
Best Practices

To ensure New Members are set up consistently and desired Member data is populated, review the Manage Vendors Grid with various filters to identify blanks within the Membership database.

Strive to keep Member records updated with the most applicable data to ensure Club communication and Member experience is most effective.

Common Questions and Concerns

How do I review Member details of a Member no longer on my Manage Members grid?

In the Manage Members grid, click on the **Active** icon to display **All Records.** All records can be retrieved whether they have been inactivated or deleted.