



Opening the Club

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

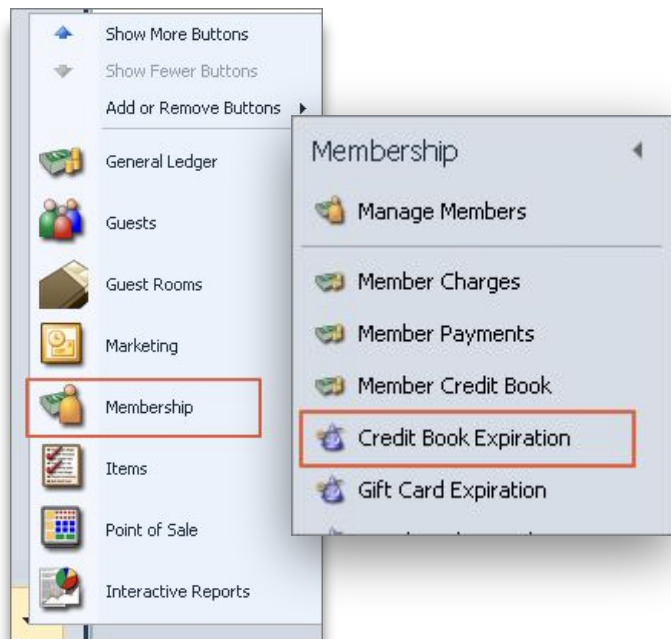
- Customize Grids
- Multi-edit Tool
- Scheduled Task
- Member Type/Status Rules

Unification Review

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

Billing and Reports

Credit Book Expiration Wizard



Credit Book Expiration Wizard

Credit Book Expiration Wizard
The credit book wizard lets you expire a portion or all of the credit book, or you can adjust an expiration date

Select an 'As Of' date along with a type

Expired As Of: 11/16/2020 ☒ Include Credit Books with no Expiration Date

Type: Golf Credit Book

You can either change an expiration date or reduce a balance

☐ Change Expiration Date

☐ Automatically adjust all expired: 12/31/2020

☒ Reduce Remaining Balance

Using Payment Type: Credit Book

☒ Automatically reduce all expired

Select an item to be used for the credit

Item: Credit Book

Description: Credit Book Expired

Cancel Previous Next Finish

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

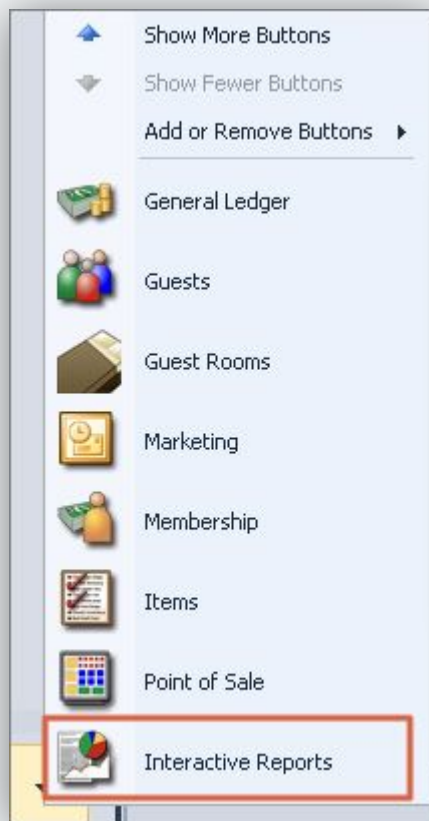
Issued To	Description	Amount	Remaining	Expire Date	Expire Amount
Jones, Vincent [00900]	MMG July 19 - 2nd place	\$50.00	\$30.00		\$30.00
Michaels, Jordan [1696]	MMG July 20	\$25.00	\$25.00		\$25.00
Smith, Bradley [1181]	MMG July 20	\$100.00	\$100.00		\$100.00
Smith, Edmund [00142]	MMG July - 1st place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

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.



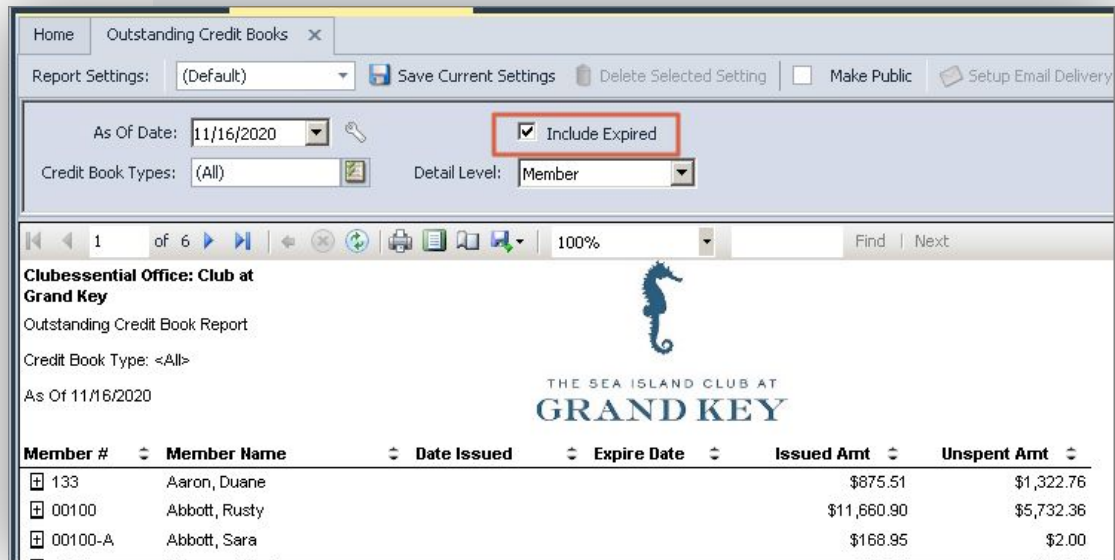
Outstanding Credit Books

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

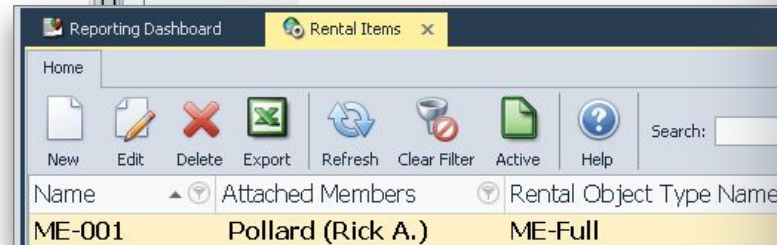
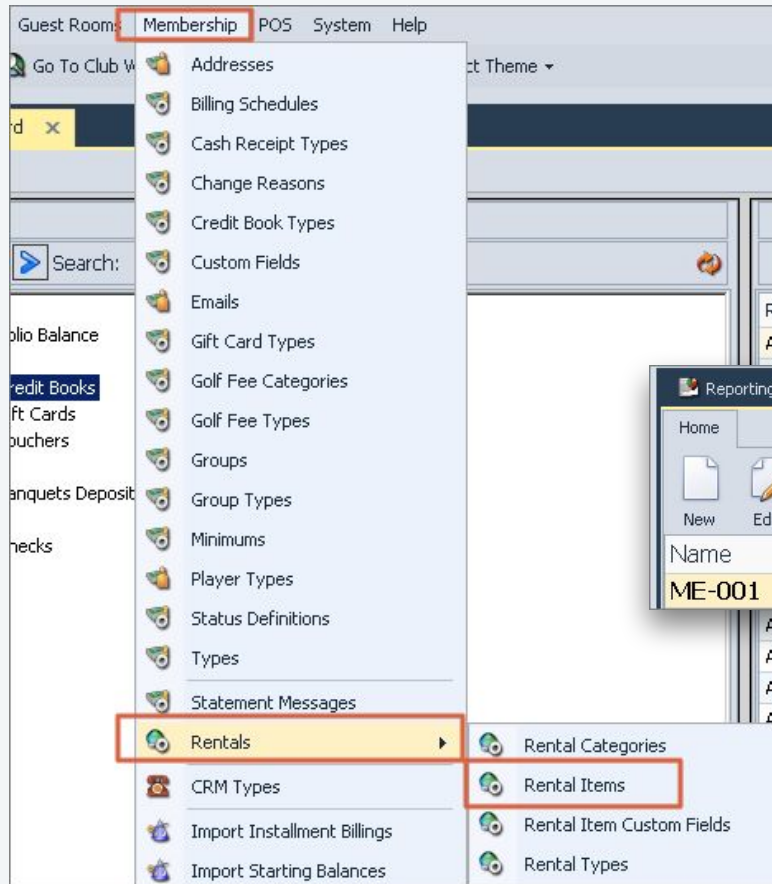


THE SEA ISLAND CLUB AT
GRAND KEY

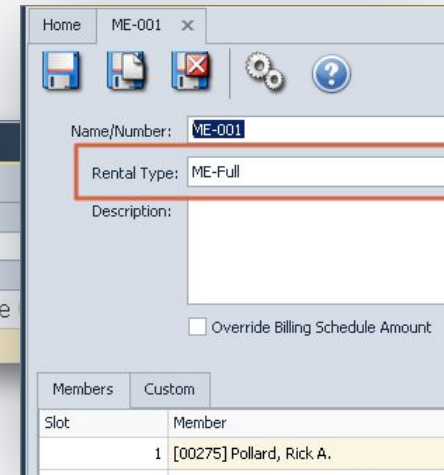
Member #	Member Name	Date Issued	Expire Date	Issued Amt	Unspent Amt
133	Aaron, Duane			\$875.51	\$1,322.76
00100	Abbott, Rusty			\$11,660.90	\$5,732.36
00100-A	Abbott, Sara			\$168.95	\$2.00

Rentals

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



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



Home | ME-001 | X

Name/Number: ME-001

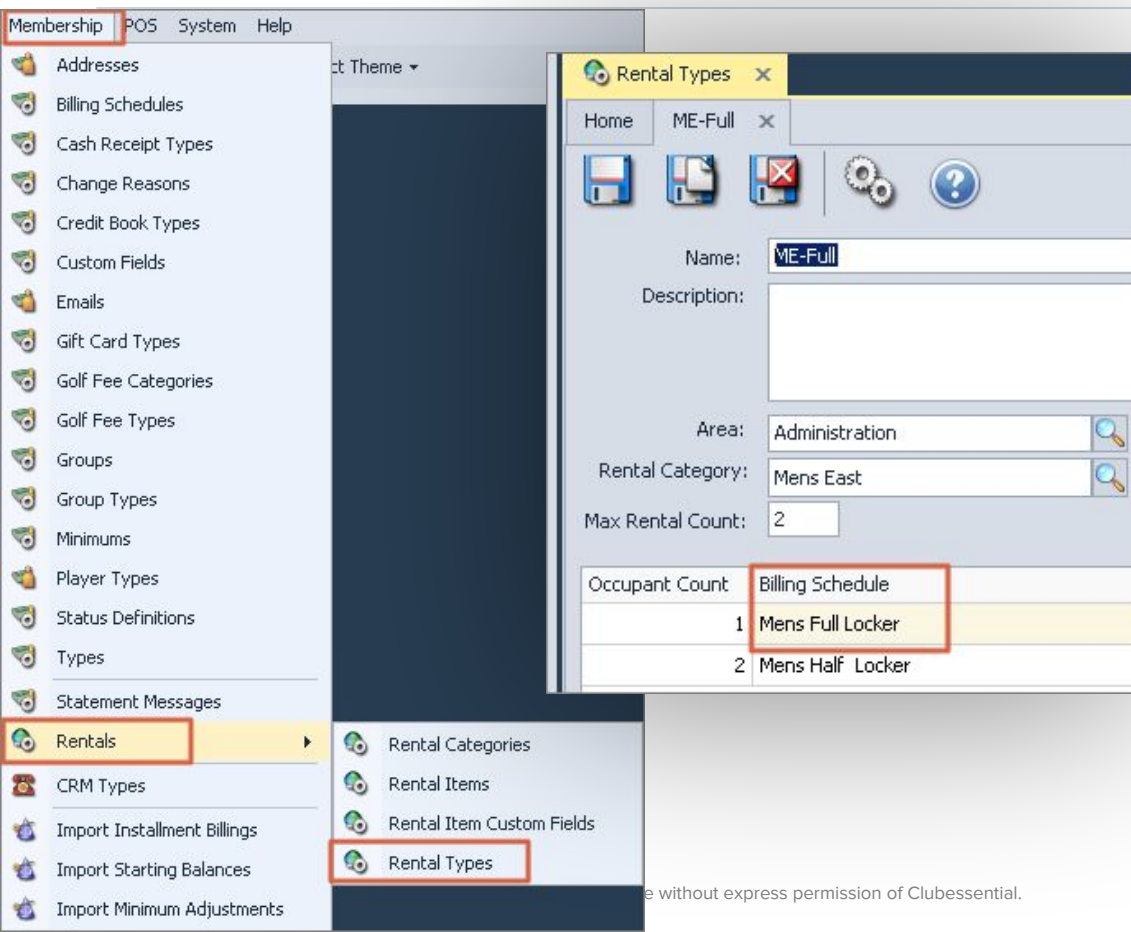
Rental Type: ME-Full

Description:

☐ Override Billing Schedule Amount

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

Rental Type



The screenshot displays the Clubessential software interface. On the left is a navigation menu with various options. The 'Rental Types' option is highlighted with a red box. In the center, a 'Rental Types' configuration window is open, showing details for a type named 'ME-Full'. The window includes fields for Name, Description, Area, Rental Category, and Max Rental Count. At the bottom of this window is a table with two columns: 'Occupant Count' and 'Billing Schedule'. The 'Billing Schedule' column is highlighted with a red box. The table lists two items: '1 Mens Full Locker' and '2 Mens Half Locker'.

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

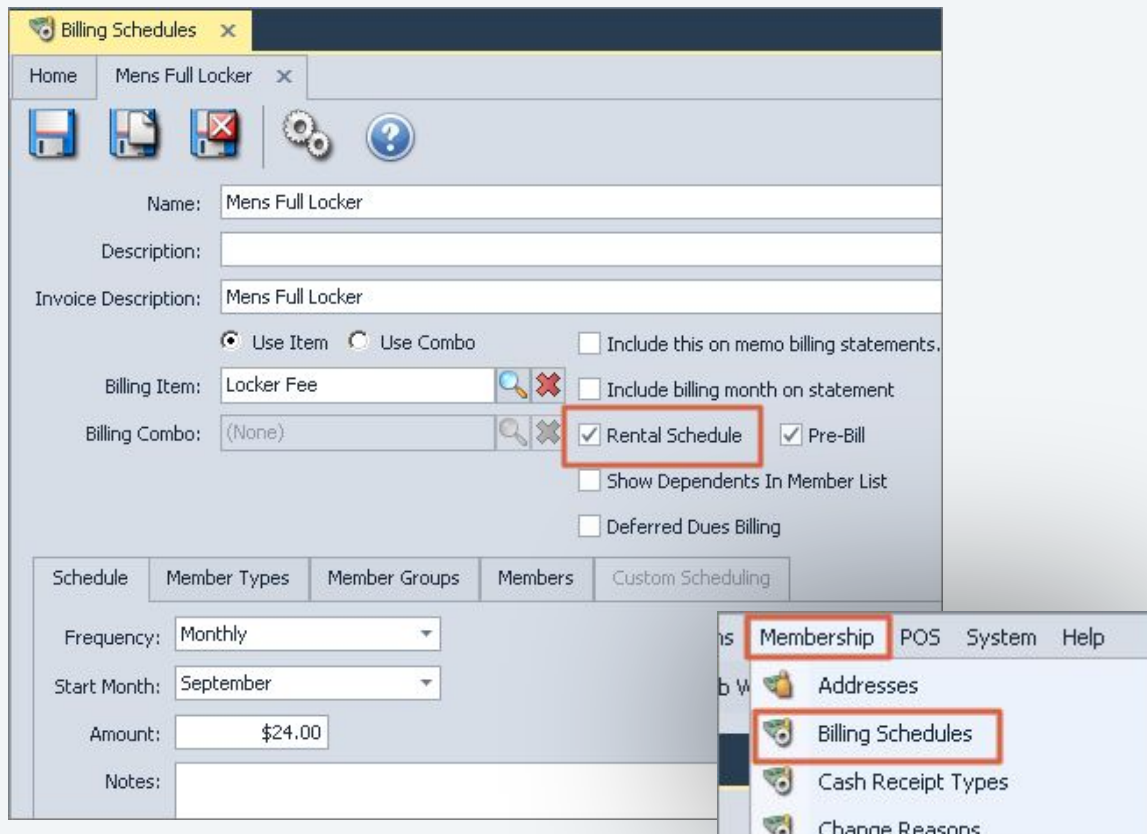
Rental Items are connected to Billing Schedules based on their **Rental Type**.

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' application window with a tab for 'Mens Full Locker'. The interface includes a top navigation bar with 'Home' and 'Mens Full Locker' tabs. Below the tabs are icons for file operations and settings. The main form contains the following fields and options:

- Name:** Mens Full Locker
- Description:** (empty field)
- Invoice Description:** Mens Full Locker
- Use Item:** Selected (radio button)
- Use Combo:** (radio button)
- Billing Item:** Locker Fee
- Billing Combo:** (None)
- Rental Schedule:** Checked (checkbox, highlighted with a red box)
- Pre-Bill:** Checked (checkbox)
- Include this on memo billing statements:** (checkbox)
- Include billing month on statement:** (checkbox)
- Show Dependents In Member List:** (checkbox)
- Deferred Dues Billing:** (checkbox)

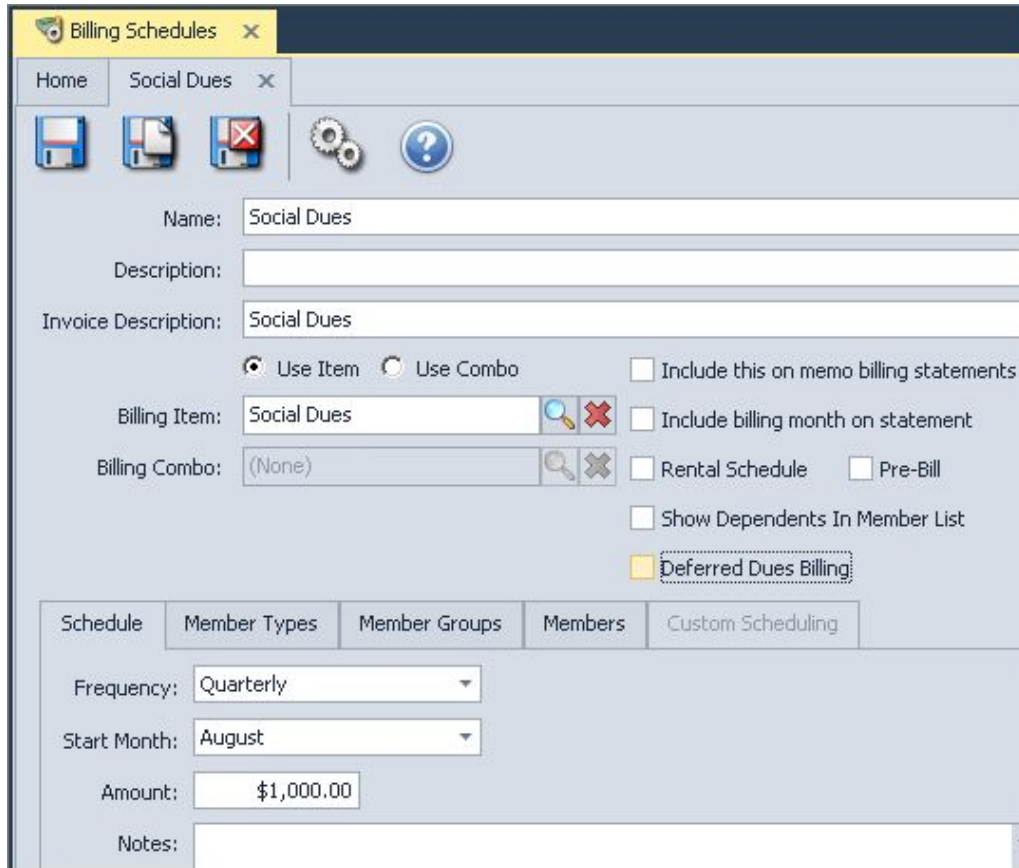
At the bottom, there are tabs for 'Schedule', 'Member Types', 'Member Groups', 'Members', and 'Custom Scheduling'. The 'Schedule' tab is active, showing:

- Frequency:** Monthly
- Start Month:** September
- Amount:** \$24.00
- Notes:** (empty field)

A dropdown menu is open on the right side of the window, showing the following options:

- Membership
- POS
- System
- Help
- Addresses
- Billing Schedules** (highlighted with a red box)
- Cash Receipt Types
- Change Reasons

Billing Schedules



The screenshot shows the 'Billing Schedules' window with a tab for 'Social Dues'. The interface includes a toolbar with icons for file operations and settings. The main form contains fields for Name, Description, and Invoice Description, all set to 'Social Dues'. There are radio buttons for 'Use Item' (selected) and 'Use Combo'. Checkboxes for 'Include this on memo billing statements.', 'Include billing month on statement', 'Rental Schedule', 'Pre-Bill', and 'Show Dependents In Member List' are present. A 'Deferred Dues Billing' checkbox is 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' as 'Quarterly', 'Start Month' as 'August', and 'Amount' as '\$1,000.00'. A 'Notes' field is at the bottom.

Home Social Dues x



File Save Print Close Settings Help



Name: Social Dues

Description:

Invoice Description: Social Dues

☒ Use Item ☐ Use Combo ☐ Include this on memo billing statements.

Billing Item: Social Dues   ☐ Include billing month on statement

Billing Combo: (None)   ☐ Rental Schedule ☐ Pre-Bill

☐ Show Dependents In Member List

☒ Deferred Dues Billing

Schedule Member Types Member Groups Members Custom Scheduling

Frequency: Quarterly

Start Month: August

Amount: \$1,000.00

Notes:

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

Home

Display Mode:

Search:

Membership

Projected Member Billing Annual

Projected Member Billing Monthly

Reporting Dashboard

Home

Projected Member Billing Annual

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

Installment 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



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GRAND KEY

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.

The screenshot displays the Clubessential Reporting Dashboard. The 'Reporting Dashboard' window is open, showing the 'Installment Billing' report. The report settings are configured as follows:

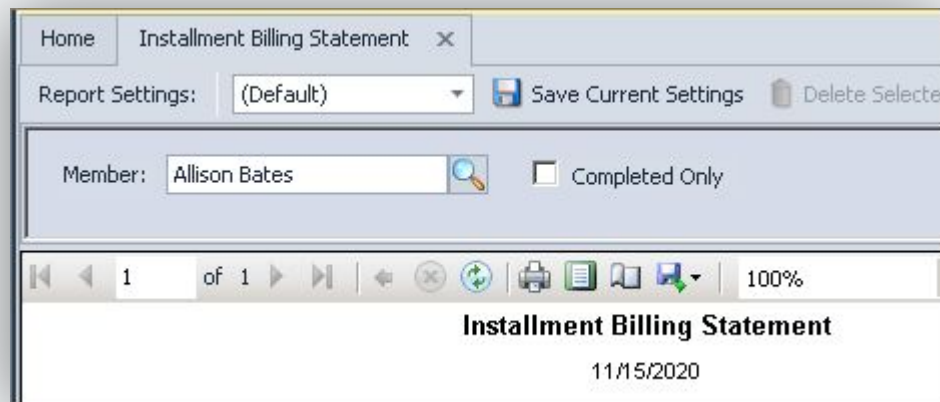
- Report Settings: (Default)
- Start Date: 1/1/2020
- End Date: 12/31/2020
- Billing Item: (All)
- Group By: Member
- Billing Combo: (All)
- Include Completed: ☐
- Exclude Guest Member: ☐

The report is for the 'Club at Grand Key' and is dated 12/31/2020. The report shows the following data:

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

Installment Billing Statement details individual members with their original details.








The screenshot shows a software window titled "Installment Billing Statement". It has a menu bar with "Home" and "Installment Billing Statement". Below the menu bar is a "Report Settings:" section with a dropdown menu set to "(Default)" and buttons for "Save Current Settings" and "Delete Selected". Below this is a "Member:" section with a text box containing "Allison Bates" and a magnifying glass icon, and a checkbox labeled "Completed Only". At the bottom of the window is a toolbar with navigation icons (back, forward, first, last, search, etc.) and a status bar showing "1 of 1" and "100%".

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

Home [00126] Allison Bates



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

Mrs. Allison Bates

Member Type: Social

Status: Active

Title: Mrs. Suffix: (None)

First: Allison

Email: bates@nvgmail.com

Player Type: (None)





Swipe ID: 00126

Middle: Last: Bates

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

Name: Junior Annual Installment

Billing Item: Jr. Installment Fee

Billing Combo: (None)

Frequency: Annually

Periods: 9

Start Month: April

Start Year: 2013

Amount: \$45,000.00

Adjustment: \$0.00

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

Installment Billing

Name: Junior Annual Installment

Billing Item: Jr. Installment Fee

Billing Combo: (None)

Frequency: Annually

Periods: 9

Start Month: April

Start Year: 2013

Amount: \$45,000.00

Adjustment: \$0.00

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

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

Installment Billing

Name: Junior Annual Installment

Billing Item: Jr. Installment Fee

Billing Combo: (None)

Frequency: Annually

Periods: 9

Start Month: April

Start Year: 2013

Amount: \$45,000.00

Adjustment: \$5,000.00

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

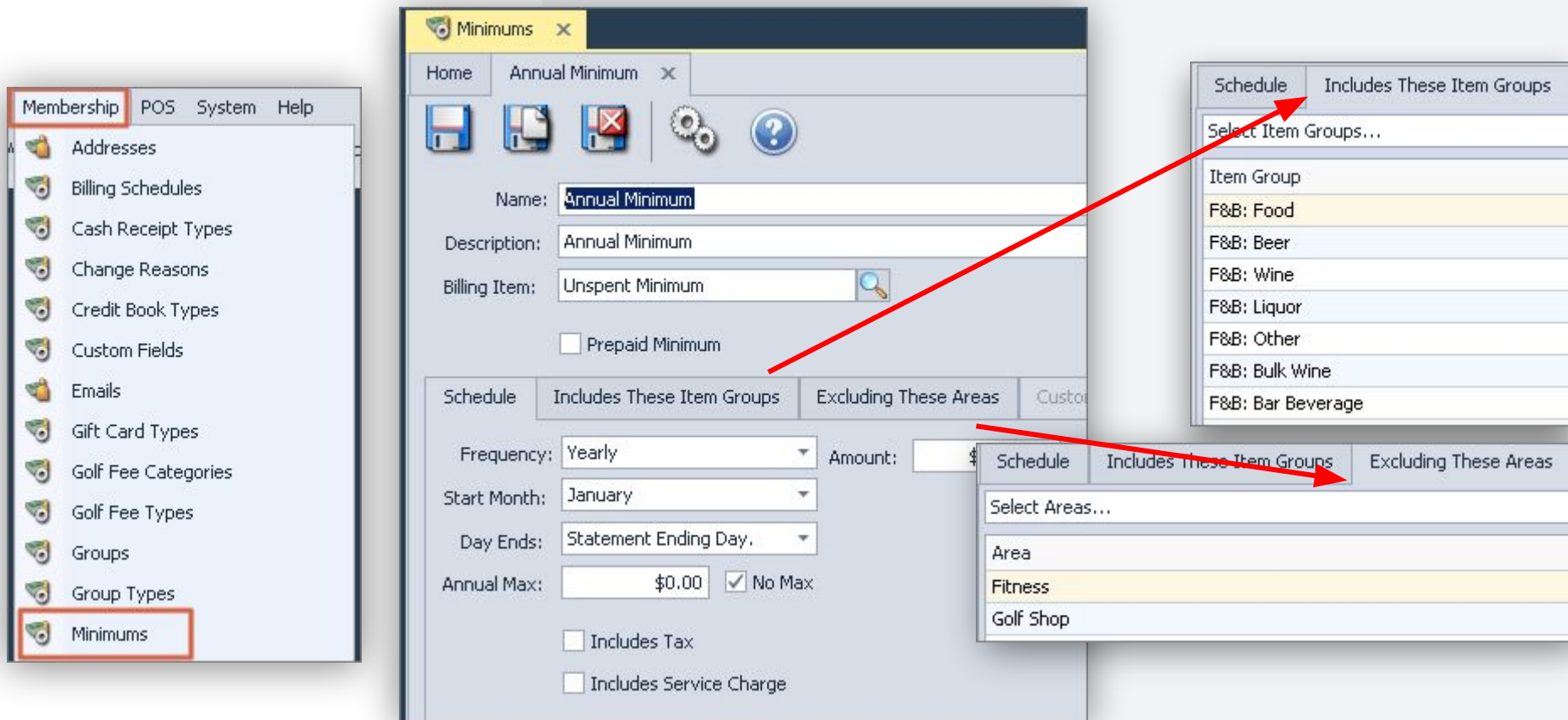
0 of 0 records found.

Installment Billing Adjustment

Description: Adjustment

Amount: \$5,000.00

ID: 0 Loaded



The screenshot displays the Minimums software interface. On the left is a navigation menu with the following items: Membership, POS, System, and Help. Under the Membership tab, the following options are listed: 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, and Minimums. The Minimums option is highlighted with a red box.

The main window is titled "Minimums" and has a tab for "Annual Minimum". The "Name" field is set to "Annual Minimum", the "Description" is "Annual Minimum", and the "Billing Item" is "Unspent Minimum". There is an unchecked checkbox for "Prepaid Minimum".

Below these fields are four tabs: "Schedule", "Includes These Item Groups", "Excluding These Areas", and "Custom". The "Includes These Item Groups" tab is selected. It shows a list of item groups: "F&B: Food", "F&B: Beer", "F&B: Wine", "F&B: Liquor", "F&B: Other", "F&B: Bulk Wine", and "F&B: Bar Beverage". A red arrow points from the "Includes These Item Groups" tab to this list.

The "Excluding These Areas" tab is also shown, with a list of areas: "Fitness" and "Golf Shop". A red arrow points from the "Excluding These Areas" tab to this list.

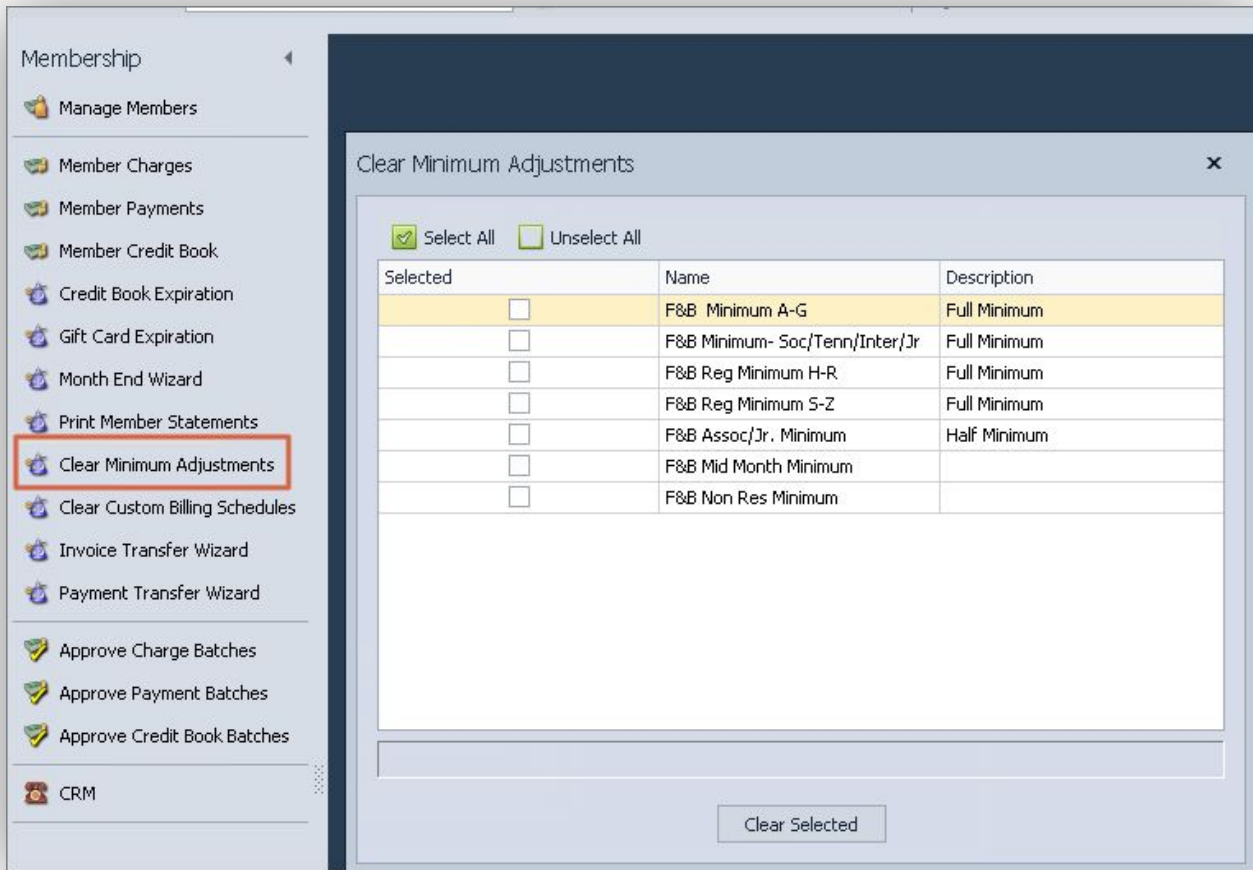
The "Schedule" tab is also visible, showing a list of schedules: "Annual Minimum", "Monthly Minimum", "Quarterly Minimum", "Half Yearly Minimum", and "Yearly Minimum".

At the bottom of the window, there are fields for "Frequency" (set to "Yearly"), "Start Month" (set to "January"), "Day Ends" (set to "Statement Ending Day"), and "Annual Max" (set to "\$0.00" with an unchecked "No Max" checkbox). There are also checkboxes for "Includes Tax" and "Includes Service Charge".

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**.



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

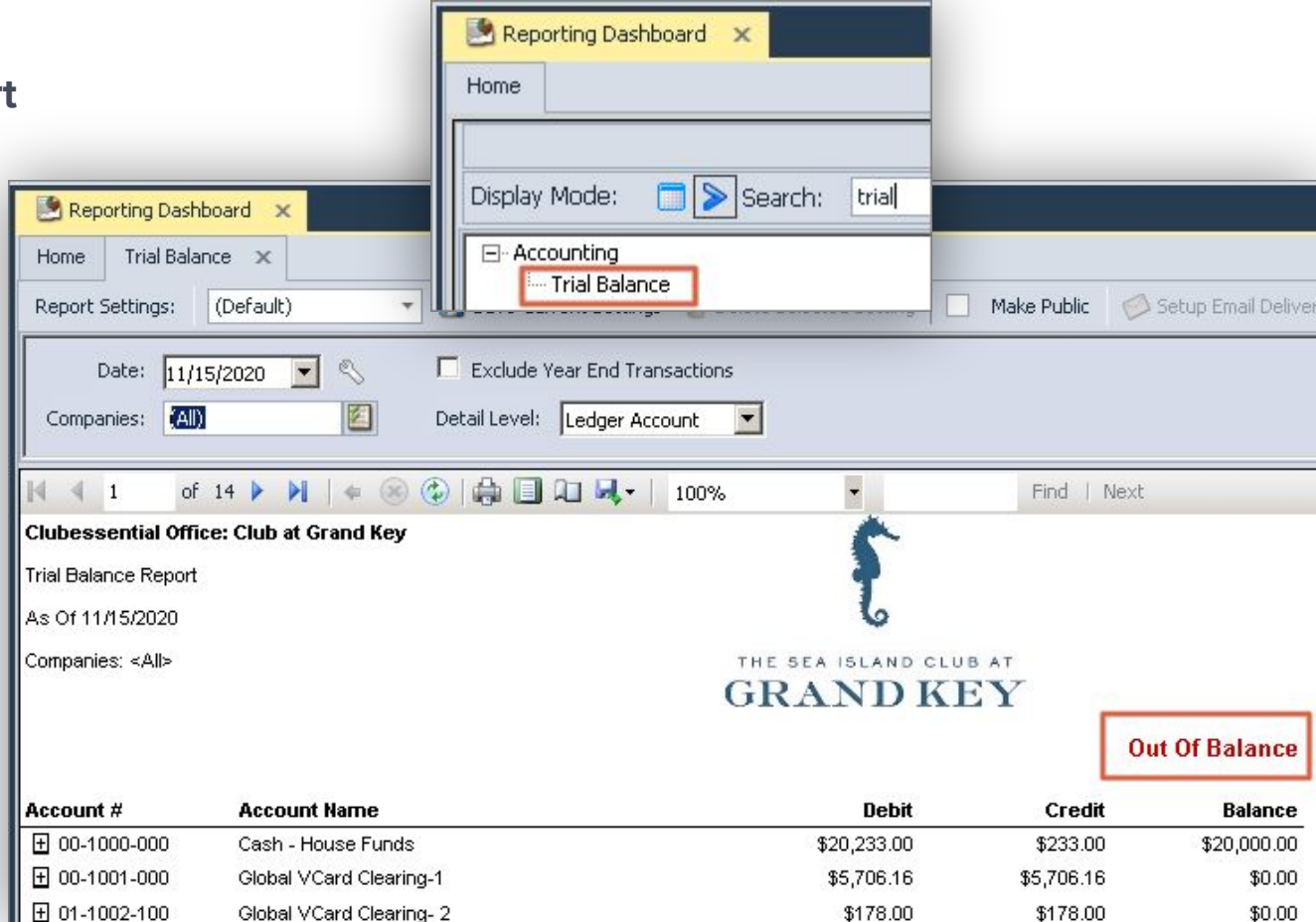
Selected	Name	Description
<input type="checkbox"/>	F&B Minimum A-G	Full Minimum
<input type="checkbox"/>	F&B Minimum- Soc/Tenn/Inter/Jr	Full Minimum
<input type="checkbox"/>	F&B Reg Minimum H-R	Full Minimum
<input type="checkbox"/>	F&B Reg Minimum S-Z	Full Minimum
<input type="checkbox"/>	F&B Assoc/Jr.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


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>

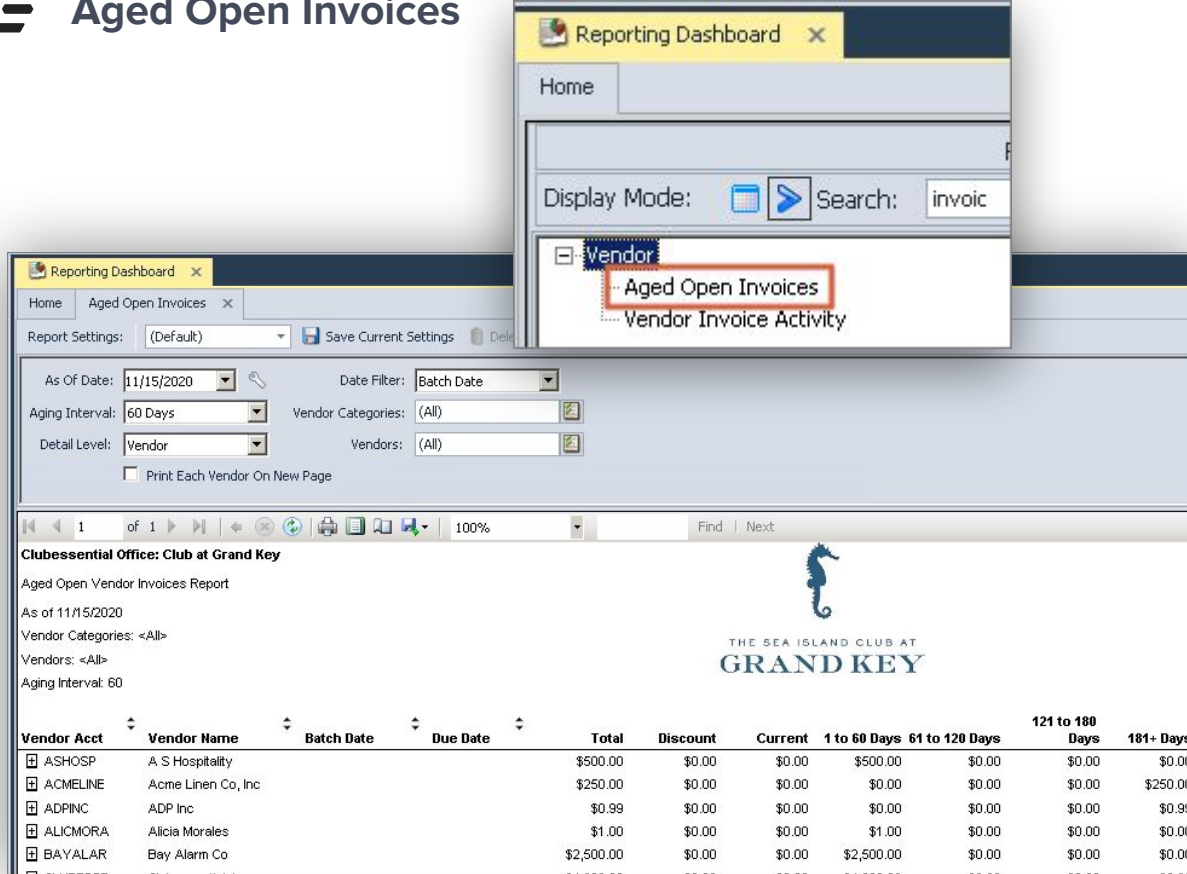


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GRAND KEY

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



Reporting Dashboard

Home

Display Mode:   Search: invoice

Vendor

Aged Open Invoices

Vendor Invoice Activity

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

1 of 1

Find | Next

Clubessential Office: Club at Grand Key

Aged Open Vendor Invoices Report

As of 11/15/2020

Vendor Categories: <All>

Vendors: <All>

Aging Interval: 60

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

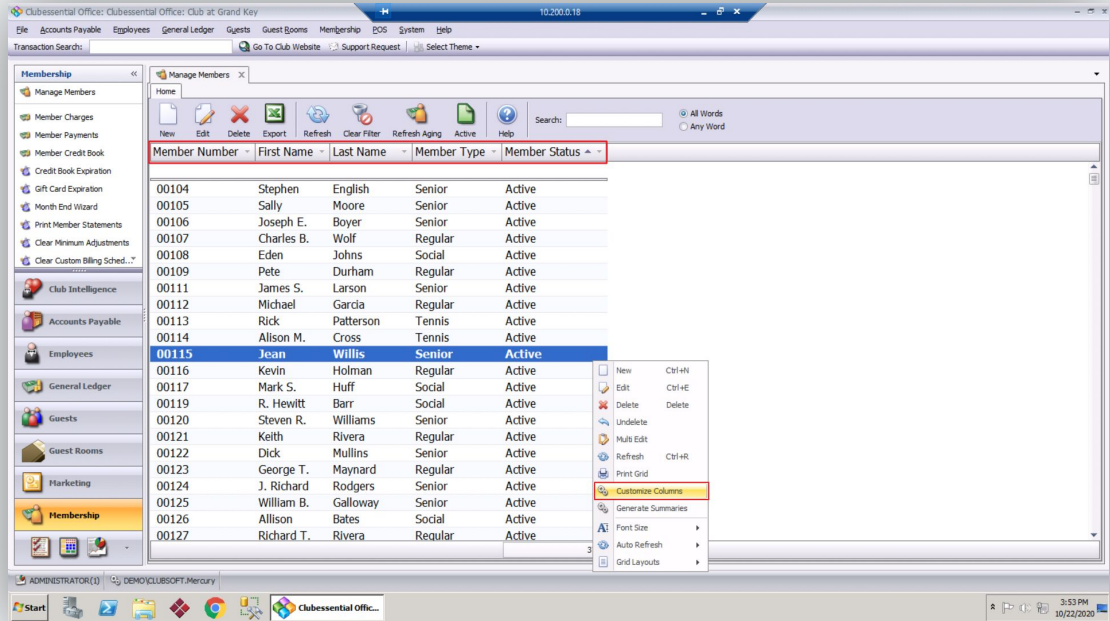


Custom Columns and Grids

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.



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	1
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 2

Generate Summaries

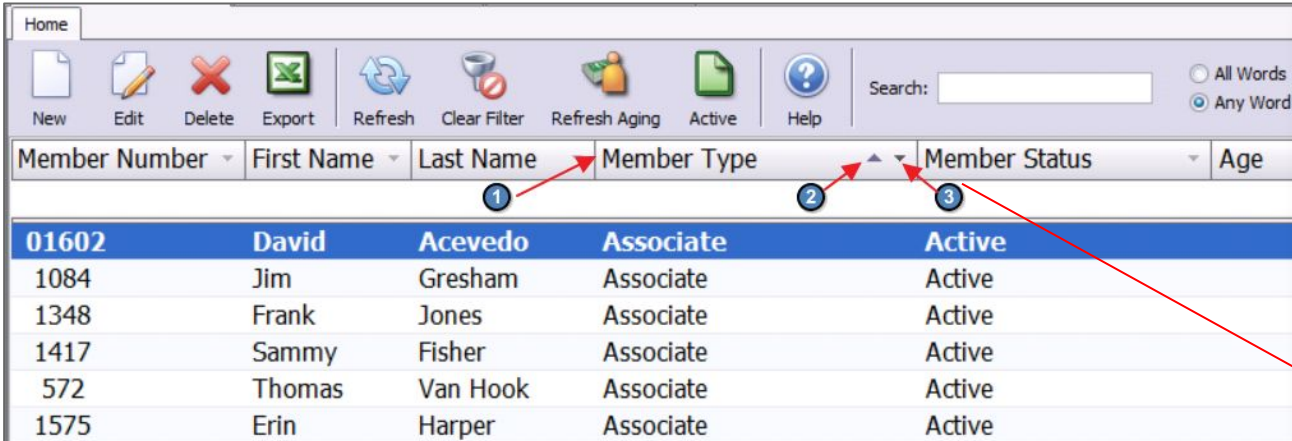
(Drag & Drop or Double-Click)
Age 3
Age Demo
Age Joined (Custom Field)
Alt Name
Approval Date
AR Balance Threshold
Auto Payment
Billing Member ID
Birthday Date
Boat #1 Beam (Custom Field)

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
00107	Charles B.	Wolf	Regular	55	04/08/1965

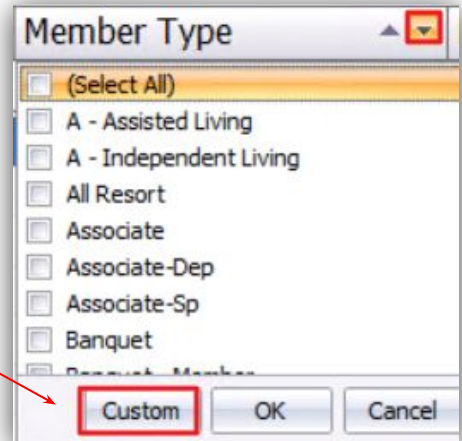
1. Select Data by **Right-Clicking** anywhere within the grid (menu selection box will appear).
2. Select **Customize Columns**.
3. Place new column headers in desired location via **drag and drop** or **double click**.

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	



Member Type

(Select All)

- ☐ A - Assisted Living
- ☐ A - Independent Living
- ☐ All Resort
- ☐ Associate
- ☐ Associate-Dep
- ☐ Associate-Sp
- ☐ Banquet
- ☐ Request Member

Custom OK Cancel

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.

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@nvknoricksen.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				y@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

× [✓] [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

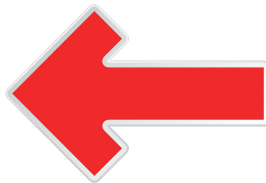
1. Filter **Member Type** to include all **Dep** types.
2. Filter **Member Status** to include all **Active** Status.
3. Filter **Age** to show anyone who is **25**.

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
00234-C	Rebecca	Colon	Regular-Dep	Active		12/22/1994	25
00293-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

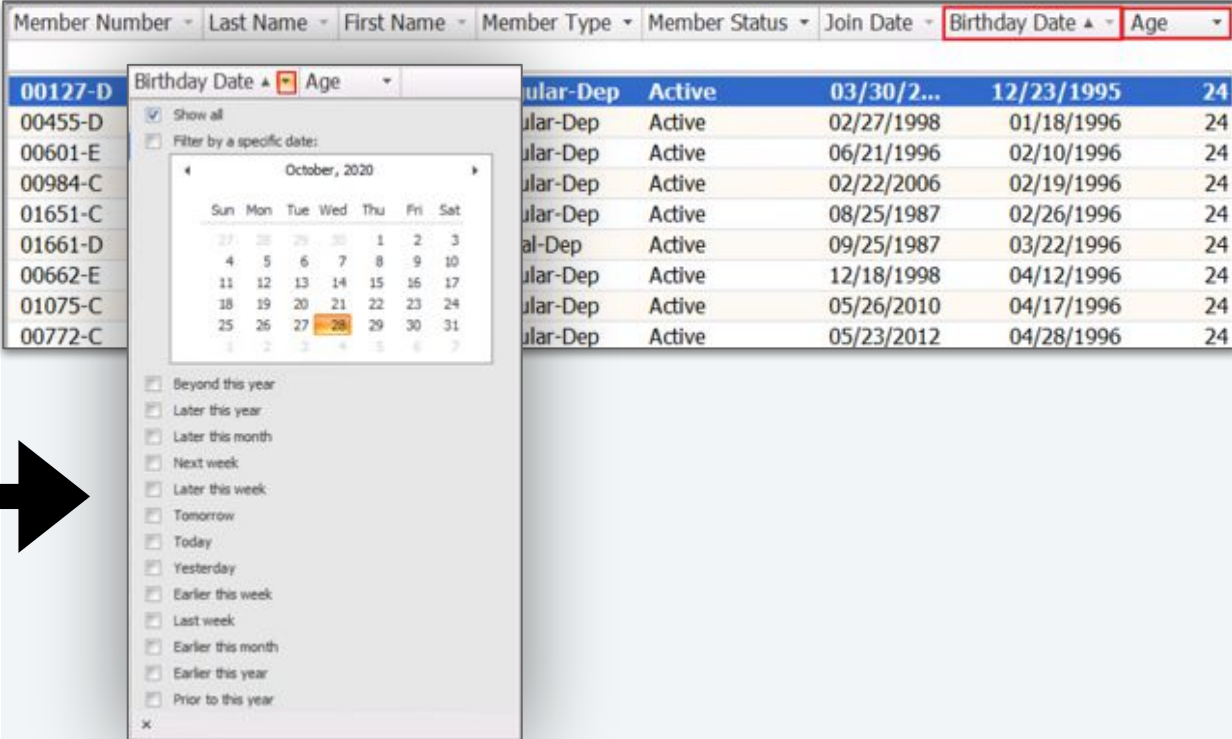
Member Number ▾	Last Name ▾	First Name ▾	Member Type ▾	Member Status ▾
00121-E	Rivera	Henry	Regular-Dep	Resigned
00140-D	Bryant	Mark	Regular-Dep	Resigned
00149-C	Hogan	Jack	Regular-Dep	Resigned
00189-D	Neal	Claire	Social-Dep	Resigned
00210-C	Roy	Libby	Regular-Dep	Resigned
00210-E	Roy	Will	Regular-Dep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

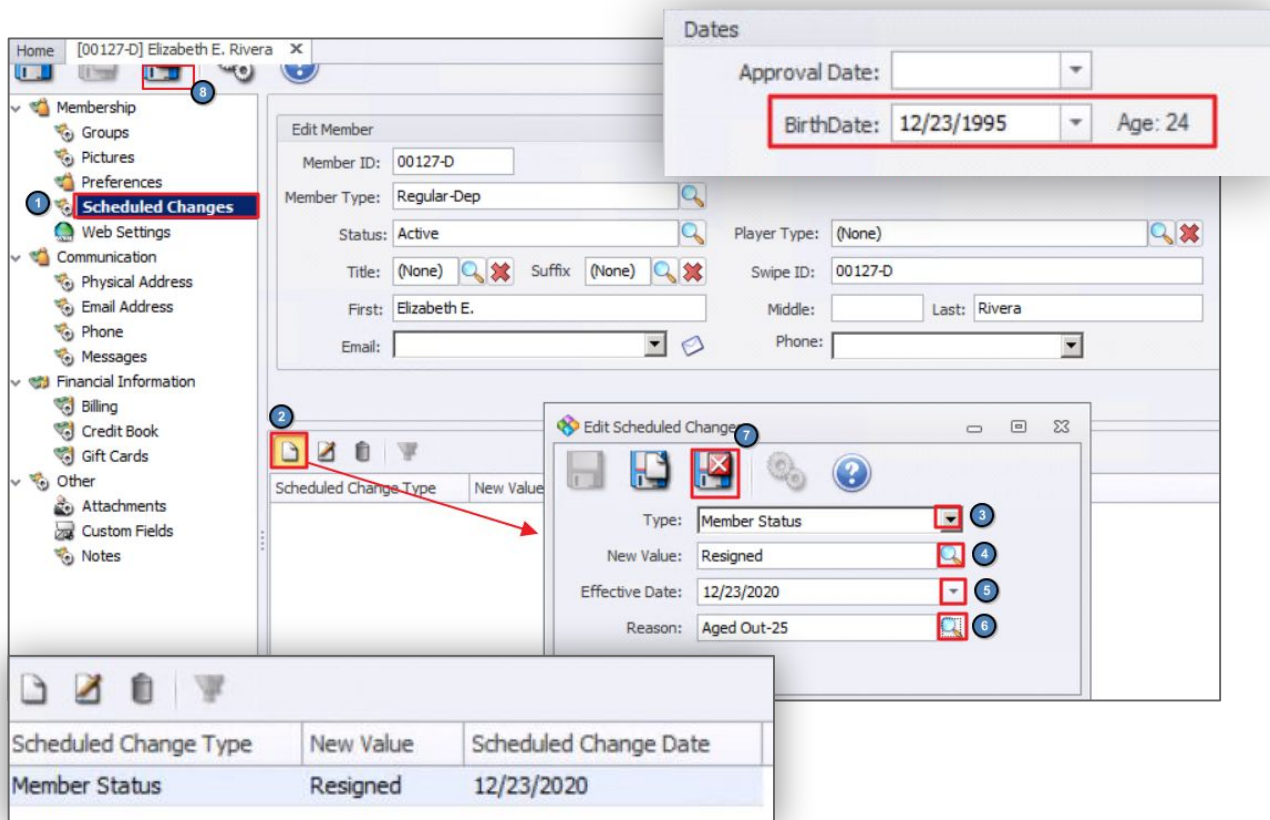


The screenshot displays a software interface with a table of member data. The table has columns for Member Number, Last Name, First Name, Member Type, Member Status, Join Date, Birthday Date, and Age. The 'Birthday Date' and 'Age' columns are highlighted with a red box. A filter dialog box is open, showing a calendar for October 2020. The date 28 is selected. Below the calendar, there are checkboxes for various time ranges: 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, and Prior to this year. A large black arrow points from the text 'range of criteria' to the filter dialog box.

Member Number	Last Name	First Name	Member Type	Member Status	Join Date	Birthday Date	Age
00127-D							
00455-D							
00601-E							
00984-C							
01651-C							
01661-D							
00662-E							
01075-C							
00772-C							

ular-Dep	Active	03/30/2...	12/23/1995	24
ular-Dep	Active	02/27/1998	01/18/1996	24
ular-Dep	Active	06/21/1996	02/10/1996	24
ular-Dep	Active	02/22/2006	02/19/1996	24
ular-Dep	Active	08/25/1987	02/26/1996	24
al-Dep	Active	09/25/1987	03/22/1996	24
ular-Dep	Active	12/18/1998	04/12/1996	24
ular-Dep	Active	05/26/2010	04/17/1996	24
ular-Dep	Active	05/23/2012	04/28/1996	24

Create New Scheduled Change



The screenshot illustrates the process of creating a new scheduled change for a member. The main window shows the 'Edit Member' form for Elizabeth E. Rivera (Member ID: 00127-D). A red box highlights the 'Scheduled Changes' tab in the left sidebar. A 'Dates' dialog box is open, showing the 'BirthDate' as 12/23/1995 and 'Age' as 24. Below the main form, a 'Scheduled Change Type' dialog box is open, showing the 'Type' as 'Member Status', 'New Value' as 'Resigned', 'Effective Date' as 12/23/2020, and 'Reason' as 'Aged Out-25'. A red arrow points from the 'New Value' field in the 'Scheduled Change Type' dialog to the 'New Value' column in the 'Scheduled Change Type' table at the bottom. The table has three columns: 'Scheduled Change Type', 'New Value', and 'Scheduled Change Date'. The first row shows 'Member Status', 'Resigned', and '12/23/2020'.

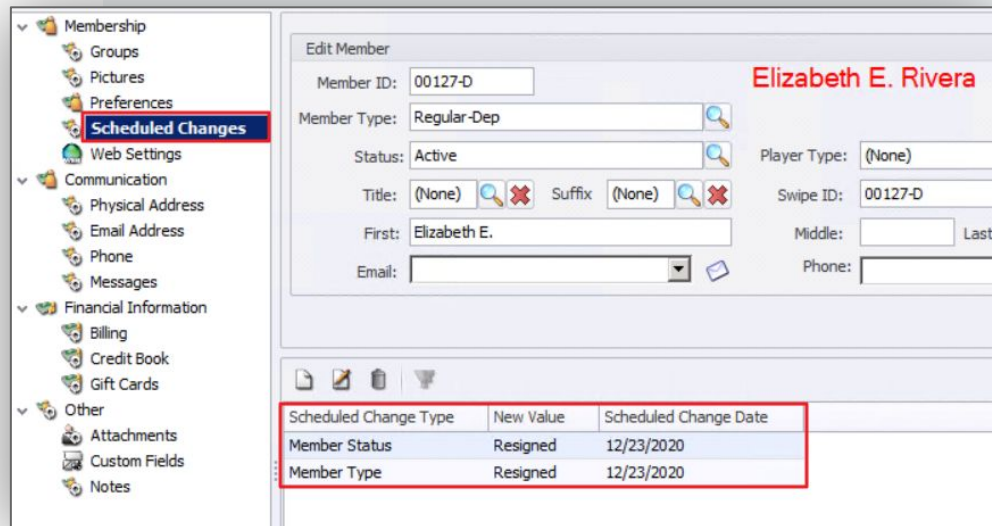
Scheduled Change Type	New Value	Scheduled Change Date
Member Status	Resigned	12/23/2020

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.



Edit Member

Member ID: 00127-D **Elizabeth E. Rivera**

Member Type: Regular-Dep

Status: Active

Title: (None) Suffix: (None)

First: Elizabeth E. Middle: Last: Phone:

Player Type: (None) Swipe ID: 00127-D

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

Member Type Rules

General Ledger Guests Guest Rooms **Membership** POS System Help

Go To Club Website Support Request Select Theme

Types X

Home

New Edit Delete Export Refresh Clear Filter Active Help

Search: seasonal All Words Any Word

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"/>

Items to Review:

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

Types X

Home **LS- Seasonal Spouse** X

Name: LS- Seasonal Spouse

Description: Las Sendas

Minimum Age: 0 Redprocal Club ☒ Is Spouse

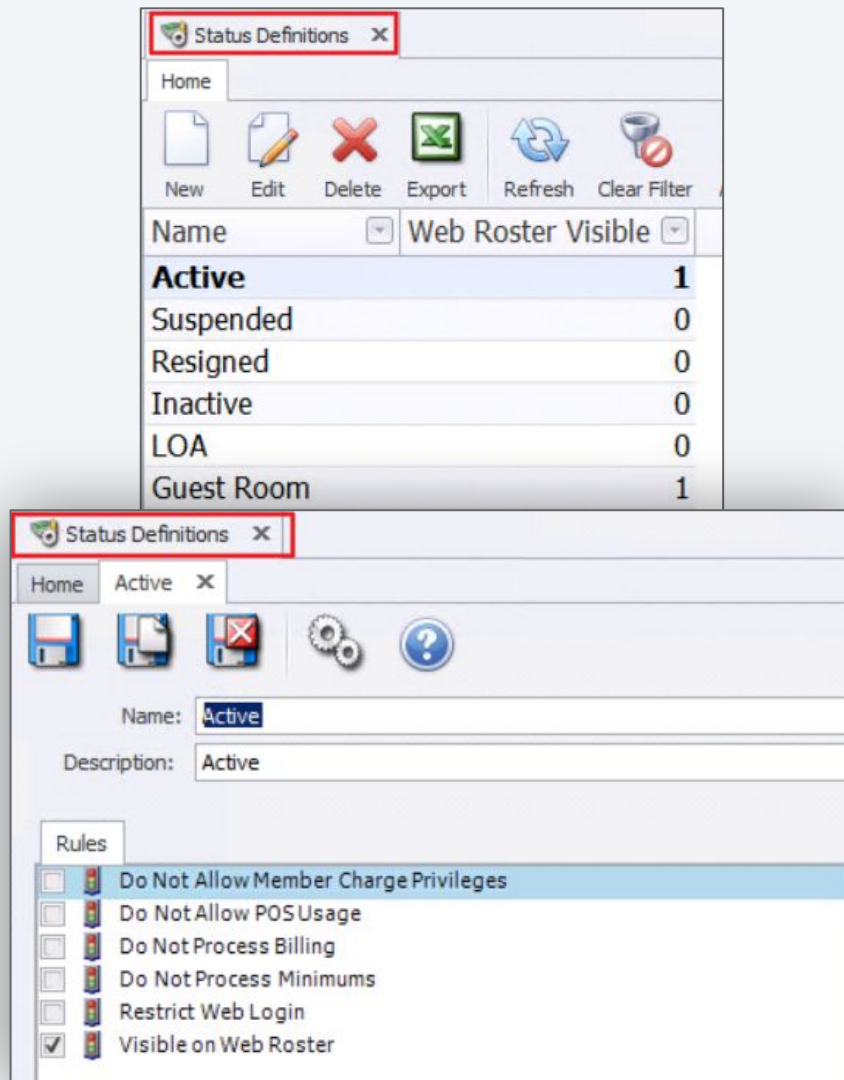
Maximum Age: 0 Tax Exempt

Event Class: Member Revenue Company: Clubessential Club

Golf Class:

Late Fees **Rules** Overrides

- ☒ Do Not Display Members on Member Grid
- ☒ Do Not Display Members in POS Lookup
- ☒ Use Member Pricing
- ☒ Restrict Web Login
- ☒ Visible on Web Roster



Member Status Rules

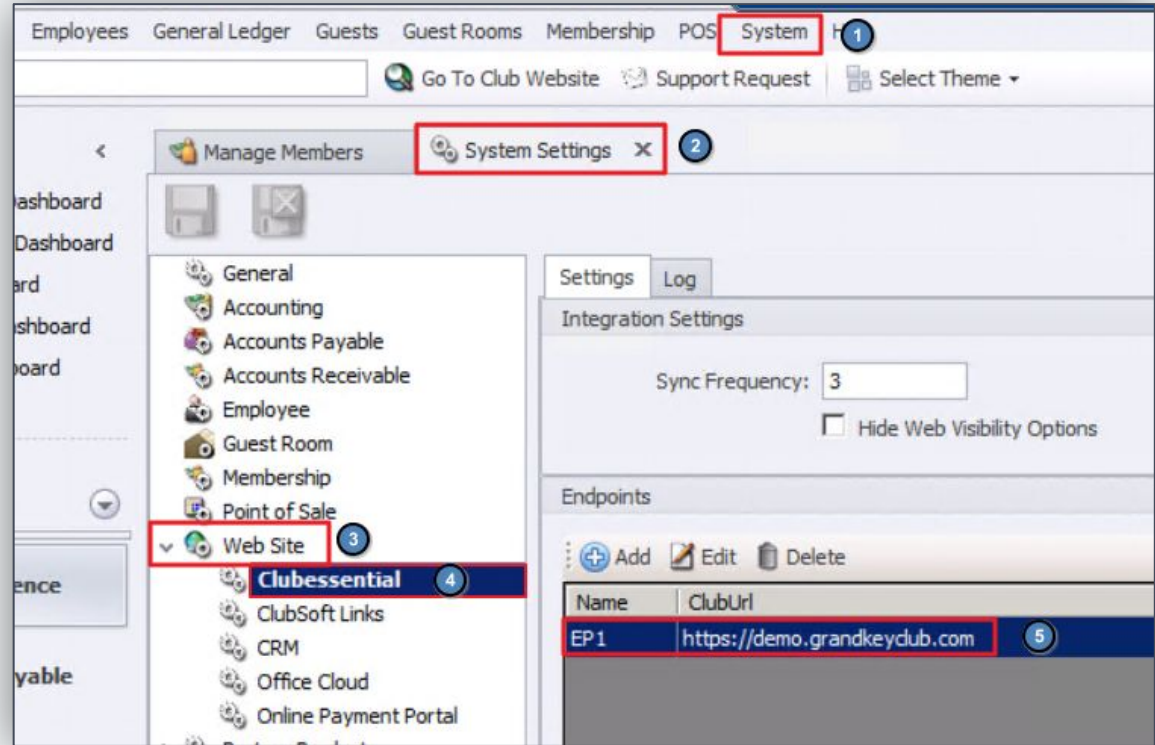
Just like a Member Type, Rules can be applied to a Member Status that affect Billing, POS, Minimums and Web Visibility.

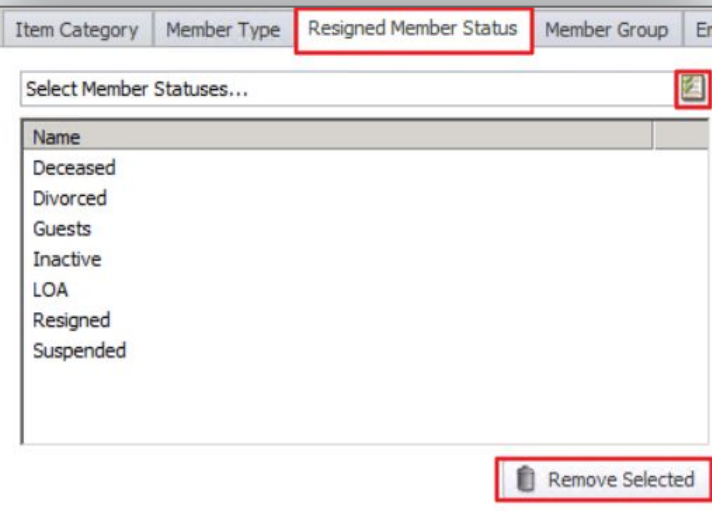
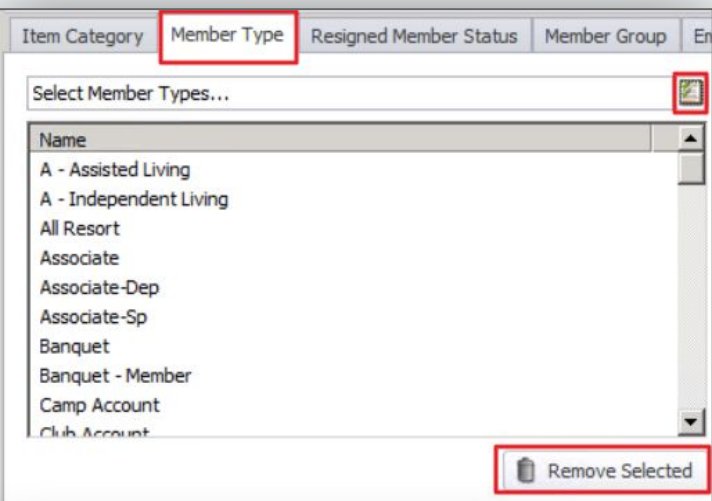
Unification Reminders

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.





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.

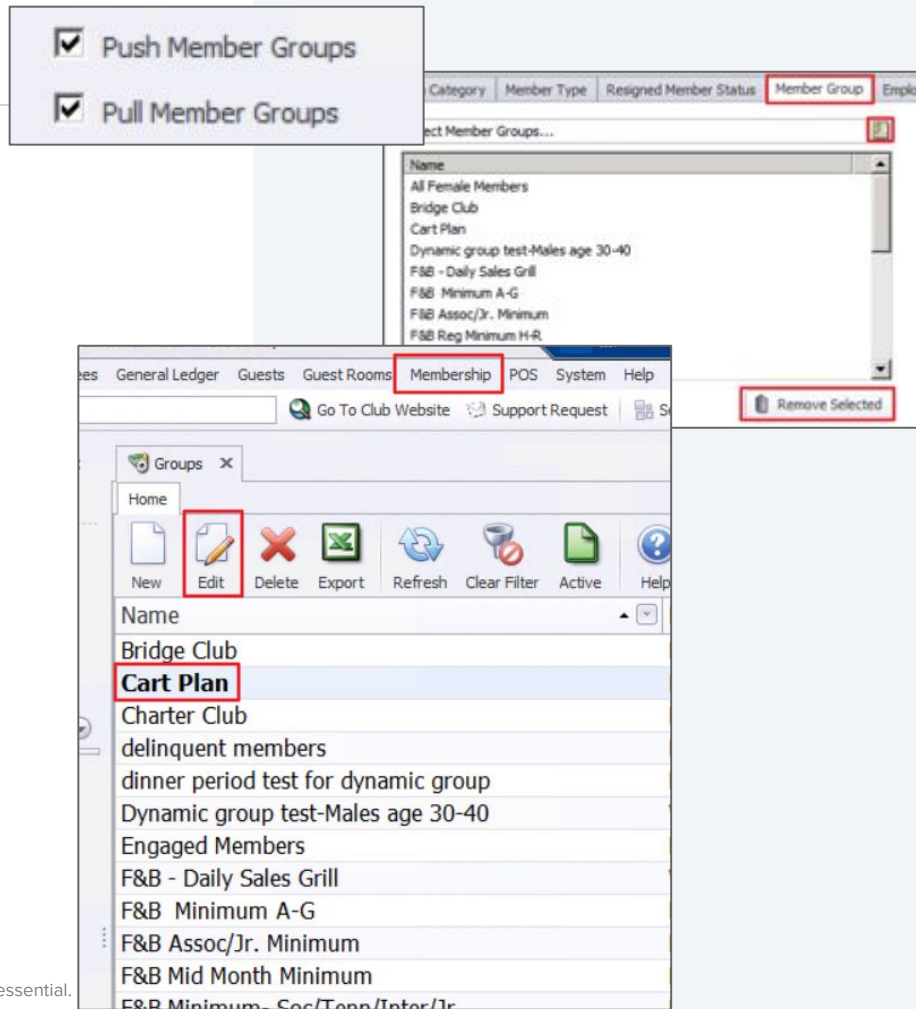
On the **Member Status** tab, review that no changes are needed to indicate which office status' will make a member inactive on the web.

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**.



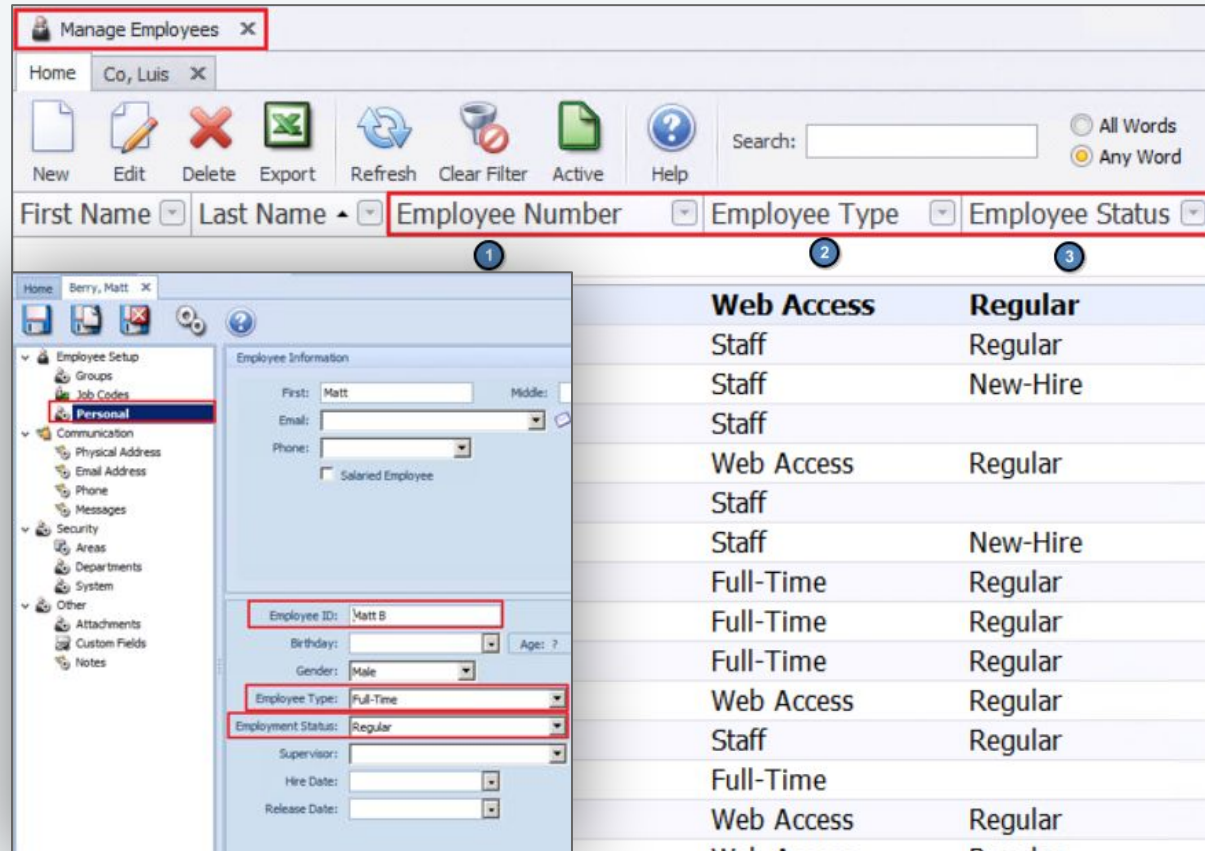
Manage Employees-Personal Tab

- 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.



The screenshot displays the 'Manage Employees' application window. The 'Personal' tab is selected in the left-hand navigation pane. The main area shows the 'Employee Information' form for 'Matt B'. The 'Employee ID' is 'Matt B', 'Birth Day' is empty, 'Age' is '?', 'Gender' is 'Male', 'Employee Type' is 'Full-Time', and 'Employment Status' is 'Regular'. The 'Web Access' and 'Regular' columns are highlighted in the table below.

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

