



Minimums

2016 - Winter Edition

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Overview

Minimums are used to require a club's members to spend a certain amount of money at the club within a specified time frame. The Office system can generate Monthly, Quarterly, Semi-Annual, Yearly, or Custom Minimum schedules. If a member does not spend their required amount within the specified time frame, they will be billed the remaining balance at the corresponding Month End.

Use Case(s)

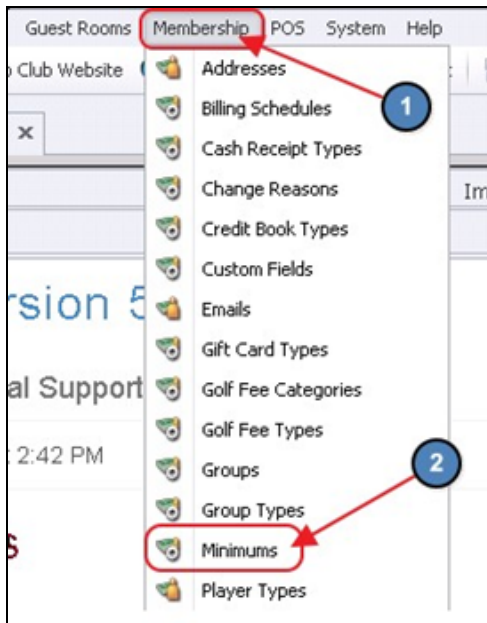
The Club requires its Members to spend \$250 each month at the Club. Spending in all areas of the Club (with the exception of Banquets) counts toward a Member's minimum spend. Periodically, in an effort to retain long-time Members, or to make up for a Club's mistake, the Club may lower the amount of required minimum spend for a Member(s) for a period of time. The Club enters Minimum adjustments to ensure the reduced minimums properly reflect in the Member(s) account(s).

Accessing the Tool

The first step to configuring Minimums is to set up the **Minimum**. This is where the user configures the rules and frequency to be associated with the Minimum.

To access **Minimums**,

- 1) Navigate to **Membership** across the top toolbar and select **Minimums**.



2) The **Minimums Grid** will launch.

A screenshot of the 'Minimums Grid' interface. It features a toolbar with icons for New, Edit, Delete, Export, Refresh, Clear Filter, Active, and Help. A search box is present with radio buttons for 'All Words' and 'Any Word'. Below the toolbar is a table with columns: Name, Description, Month Begins, Ending Day, Amount, Annual Max, and Include Tax.

Name	Description	Month Begins	Ending Day	Amount	Annual Max	Include Tax
A-G Golf		1	10	\$0.00	\$0.00	<input type="checkbox"/>
H-M Golf		1	20	\$0.00	\$0.00	<input type="checkbox"/>
N-Z Golf		1	0	\$0.00	\$0.00	<input type="checkbox"/>
H-M Social		1	20	\$0.00	\$0.00	<input type="checkbox"/>
N-Z Social		1	0	\$0.00	\$0.00	<input type="checkbox"/>
A-G Social		1	10	\$0.00	\$0.00	<input type="checkbox"/>
\$1,200 Annual Minimum	\$1,200 Annual Minimum	1	0	\$1,200.00	\$0.00	<input type="checkbox"/>
\$70 Grill Food Minimum		2	1	\$100.00	\$0.00	<input type="checkbox"/>
\$100 Quarterly Min-Food		7	0	\$105.00	\$1,000.00	<input type="checkbox"/>

The primary functions associated with managing **Minimums** are embedded in the Minimums setup screen, which can be accessed by double-clicking on an existing Minimum (to edit an existing minimums), or clicking the **New** button (to create a new minimum).

Minimum Setup - Tab Overview

In this section we will review the various tabs within a Minimum.

General Information

- 1) Enter the **Name** and **Description** of the new Minimum.
- 2) Select the **Billing Item**. This is the item that will be charged at Month End for any unspent minimums.
- 3) Check **Prepaid Minimum** if members are to be billed their minimum amount in advance.



Home New x

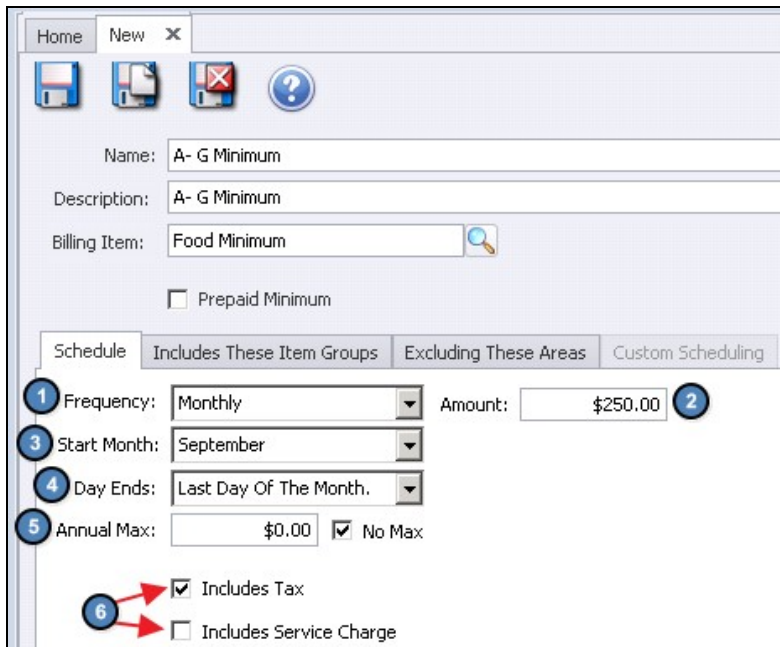
Name: A-G Minimum

Description: A-G Minimum

Billing Item: Food Minimum

Prepaid Minimum

Schedule



Home New x

Name: A- G Minimum

Description: A- G Minimum

Billing Item: Food Minimum

Prepaid Minimum

Schedule Includes These Item Groups Excluding These Areas Custom Scheduling

1 Frequency: Monthly Amount: \$250.00 2

3 Start Month: September

4 Day Ends: Last Day Of The Month.

5 Annual Max: \$0.00 No Max

6 Includes Tax

Includes Service Charge

- 1) **Frequency** - Select the frequency of the Minimum (Monthly, Quarterly, Semi- Annual, Yearly, or Custom).
- 2) **Amount** - Enter the amount of the Minimum.

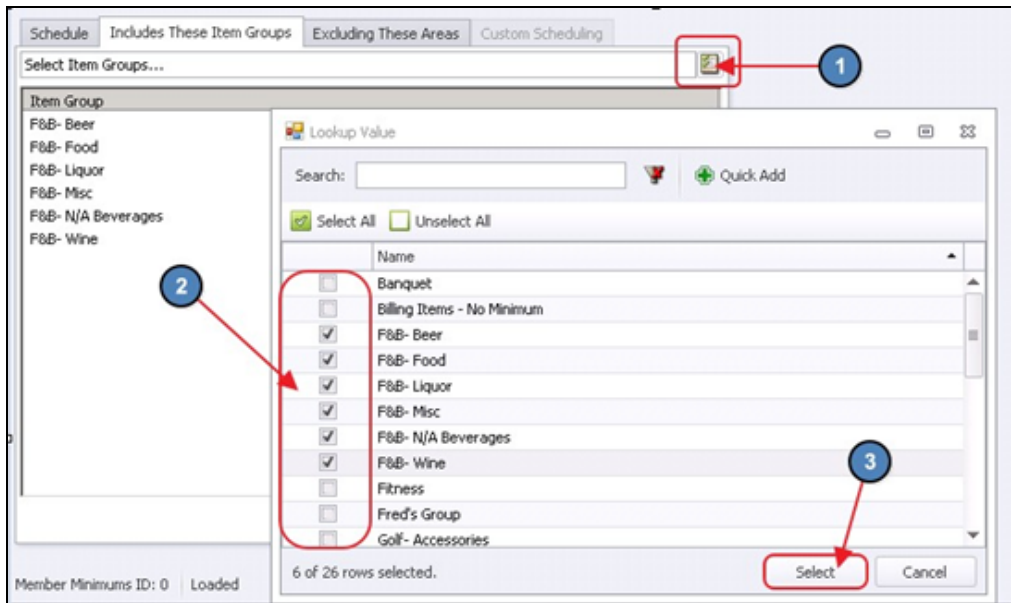
- 3) **Start Month** - Select the month the Minimum will begin.
- 4) **Day Ends** - Select the day the Minimum ends. Any unspent Minimum balances as of this day will be billed to the member.
- 5) **Annual Maximum** - Specify an annual maximum. If there is not an annual maximum, check **No Max**.
- 6) **Includes Tax** - If any tax charged on minimum eligible items should count toward the Minimum amount, check this box.

Includes Service Charge - If any service charge charged on minimum eligible items should count toward the Minimum amount, check this box.

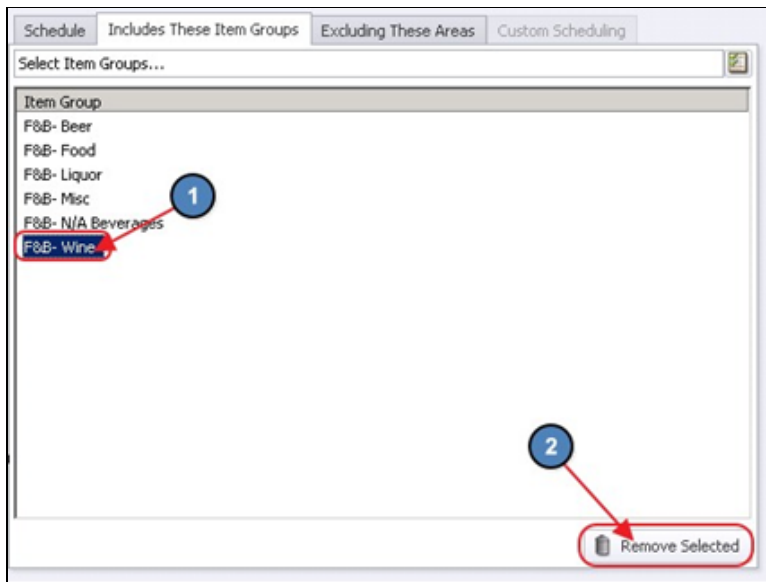
Includes These Item Groups

The **Includes These Item Groups** tab is where the user will select the **Item Groups** that will apply toward the Minimum. Furthermore, based on the embedded hierarchy, all Items within these Item Groups will count toward the member’s Minimum balance.

To add Item Groups to the Minimum, select the **Item Groups Lookup**, click to select the applicable Item Groups from the Lookup value, and choose **Select** at the bottom of the screen.



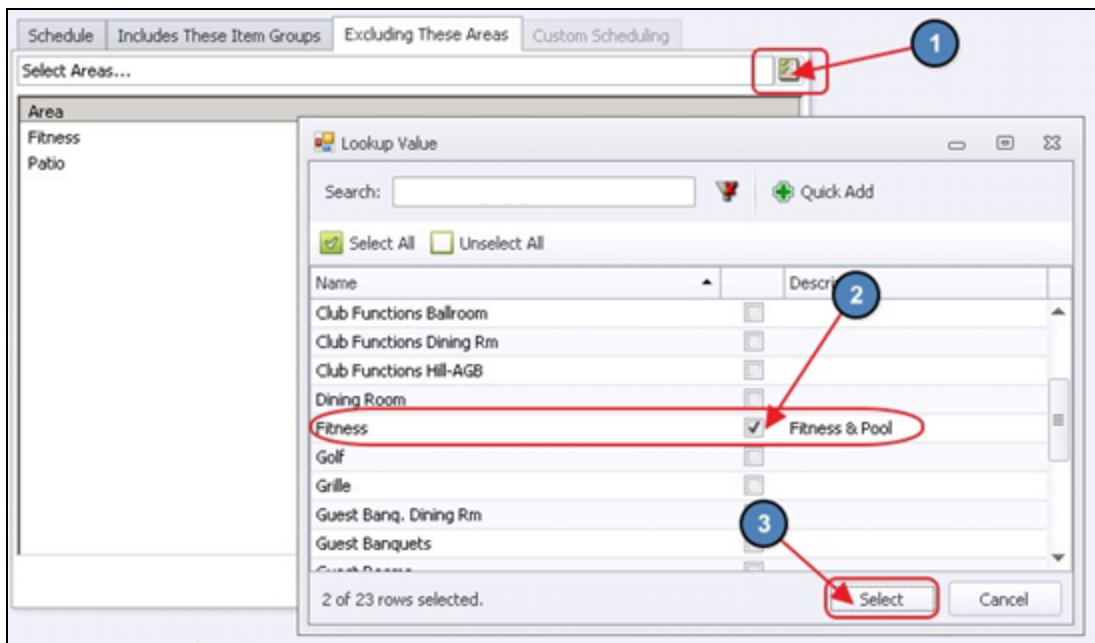
To remove an Item Group from the Minimum, highlight the Item Group in question from the selected Groups screen and choose **Remove Selected**.



Excluding These Areas

The **Excluding These Areas** tab allows the user to exclude certain Areas from the Minimum. For instance, if the user does not want any transactions completed within the Fitness Area to be counted toward the Minimum, they would select the Fitness Area on this tab.

To add excluded Areas to the Minimum, select the **Areas Lookup**, click to select the applicable Areas from the Lookup value, and choose **Select** at the bottom of the screen.



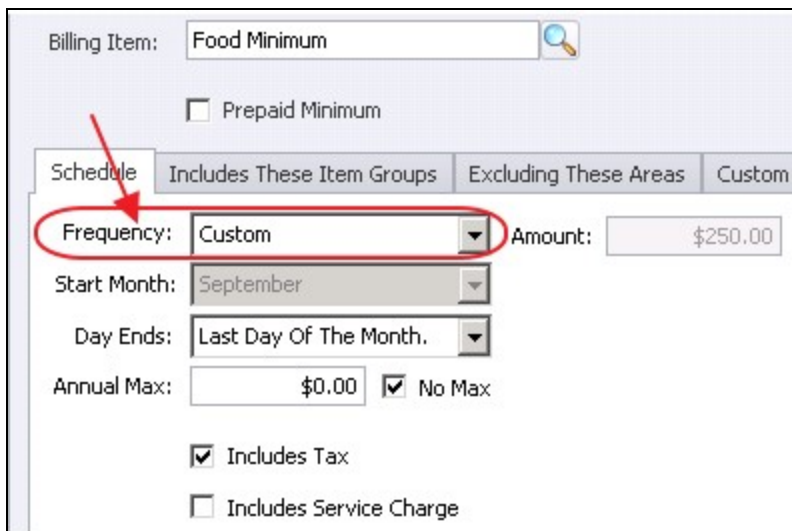
To remove an Excluded Area from the Minimum, highlight the Area from the selected Areas screen and choose **Remove Selected**.



Custom Scheduling

Minimums can also be applied on a custom basis. For instance, with Custom Scheduling the user can specify which months out of the year the Minimum will apply to their members, or they can specify varying Minimum amounts depending on the month.

To set up a **Custom Schedule**, first set the **Frequency** on the **Schedule** tab to **Custom**. As evidenced in the below screen shot, when the Frequency is set to Custom, the Start Month and Amount become Null.



Navigate to the **Custom Scheduling** tab and enter the Minimum amount next to the corresponding month.

Schedule	Includes These Item Groups	Excluding These Areas	Custom Scheduling
	Start Month	End Month	Amount
▶	January	January	\$0.00
	February	February	\$0.00
	March	March	\$50.00
	April	April	\$50.00
	May	May	\$50.00
	June	June	\$50.00
	July	July	\$50.00
	August	August	\$0.00
	September	September	\$0.00
	October	October	\$0.00
	November	November	\$0.00
	December	December	\$0.00
*	New custom schedule...		0.00

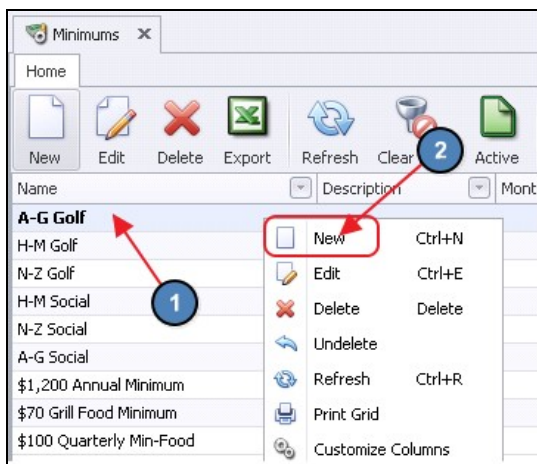
Create a New Minimum

To create a new **Minimum**, navigate to the Minimums Grid and perform either of the following to launch the Minimum setup screen:

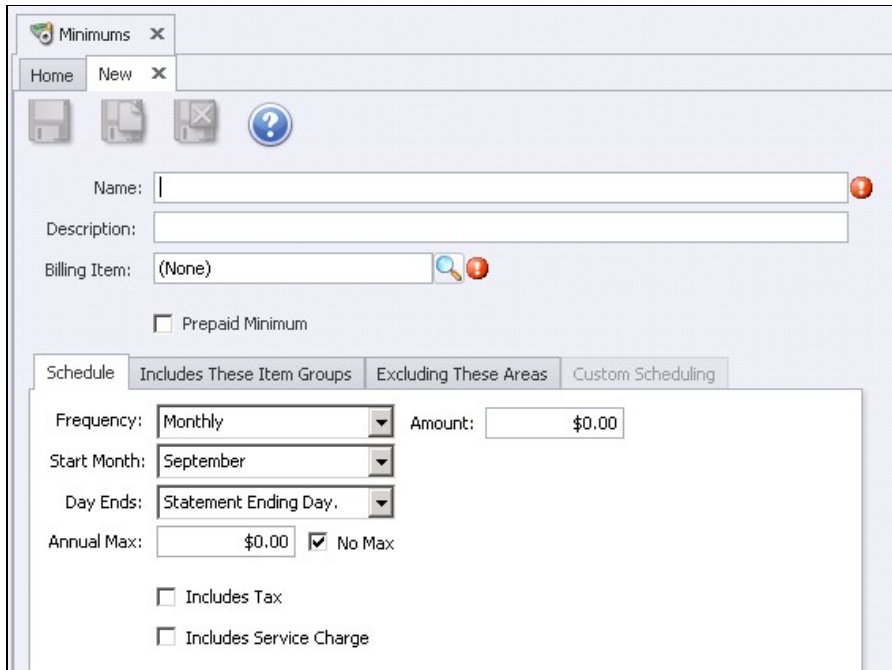
- 1) Click the **New** icon on the toolbar.



- 2) Right-click anywhere on the **Minimums Grid** and select **New**.



- 3) The Minimum setup screen will launch.



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

- **General Information**
- **Schedule**
- **Includes These Item Groups**
- **Excluding these Areas**
- **Custom Scheduling (if applicable)**

5) Lastly, click **Save & Close** to complete the setup of the new Minimum.

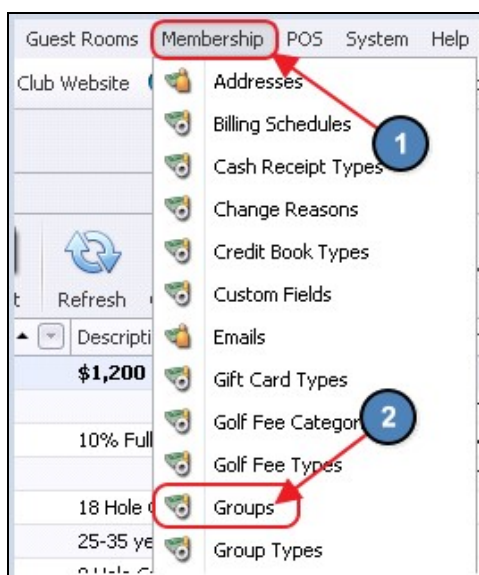


Minimum Group Setup

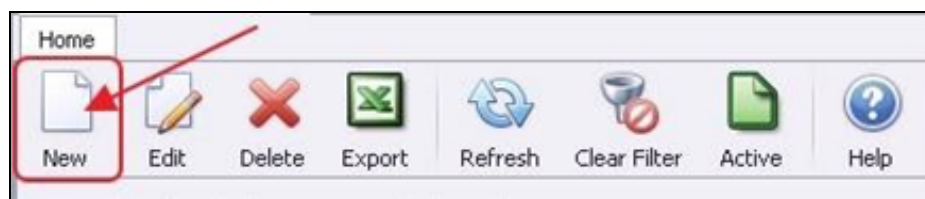
Once a new Minimum is created, a corresponding **Minimum Group** will need to be created as well. A member's inclusion in a **Minimum Group** is what applies the Minimum to their account.

To create a new Minimum Group,

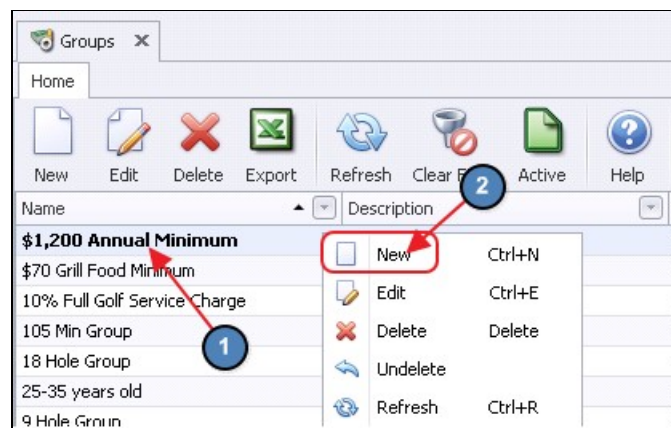
- 1) Navigate to **Membership** across the top toolbar and select **Groups**.



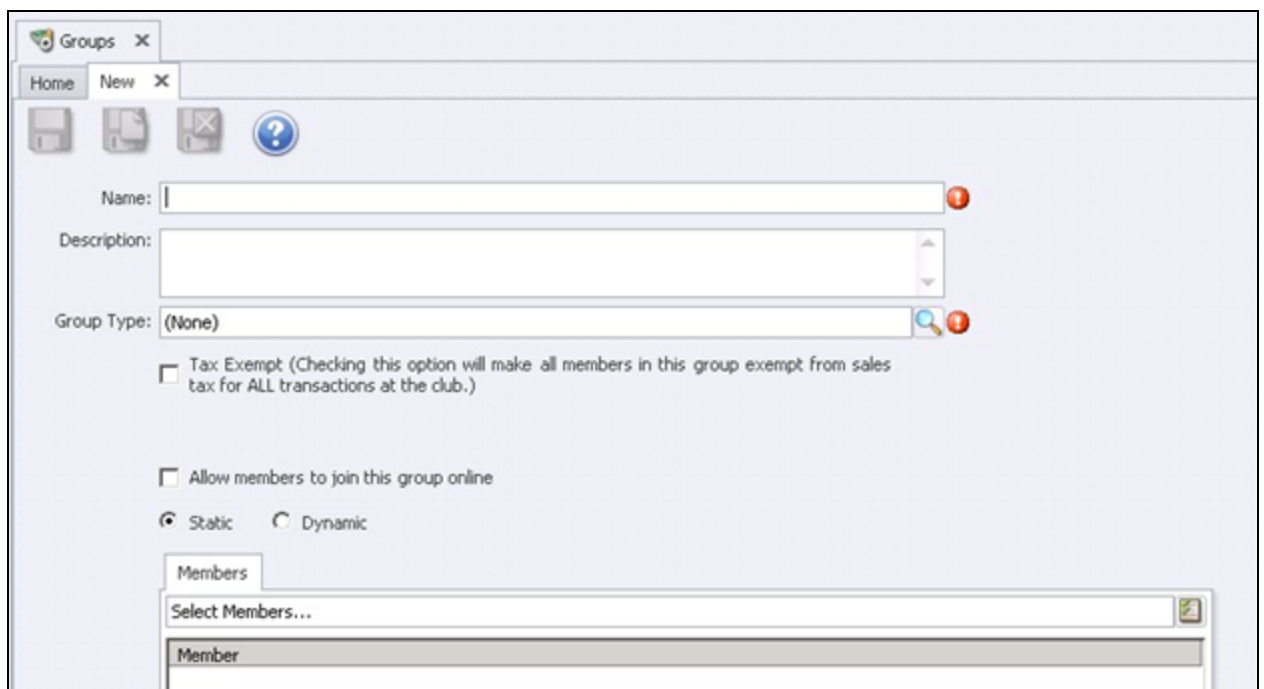
- 2) Then perform either of the following to launch the Member Group setup screen:
 - a) Click the **New** icon on the toolbar.



- b) Right-click anywhere on the **Member Groups Grid** and select **New**.



3) The Member Group setup screen will launch.



4) Enter a **Name** and **Description**.

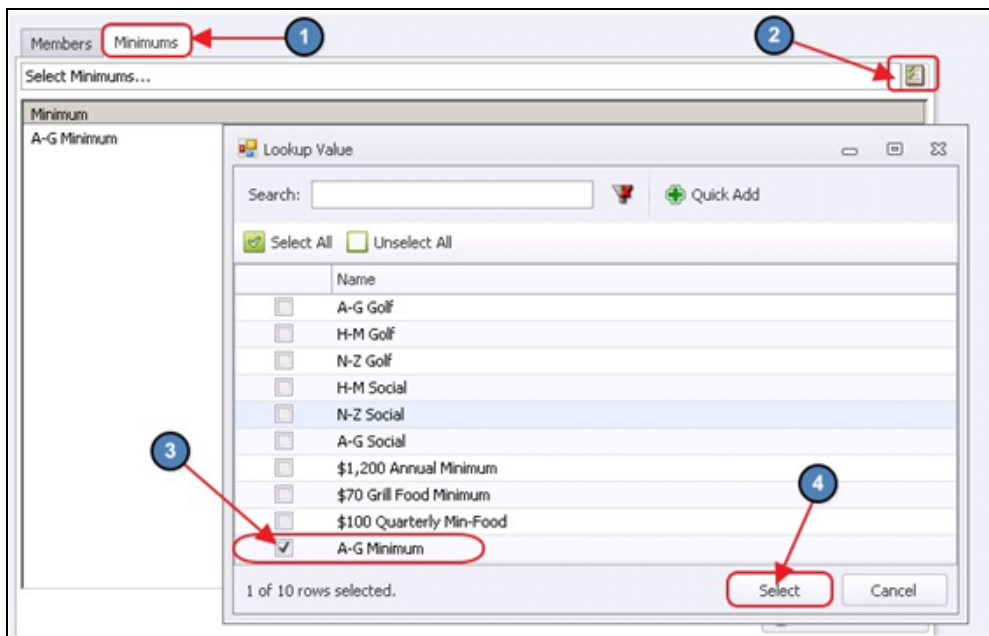
5) Select **Minimums** from the **Group Type Lookup**.

6) Because this is a Minimum Group, **Tax Exempt** and **Allow members to join this group online** can be ignored.

7) Leave the Group set to **Static**.

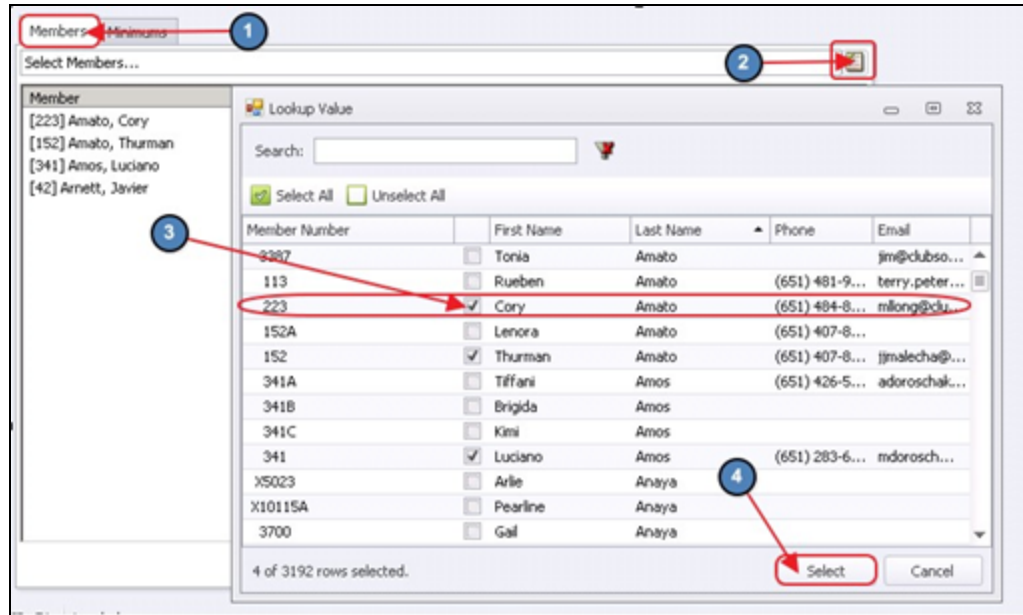


- 8) When the Group Type is set to **Minimums** an additional tab will populate also called **Minimums**.
- 9) Navigate to this tab and add the corresponding Minimum by selecting the **Minimum Lookup**. Then, click to select the applicable Minimum from the Lookup value, and choose **Select** at the bottom of the screen.

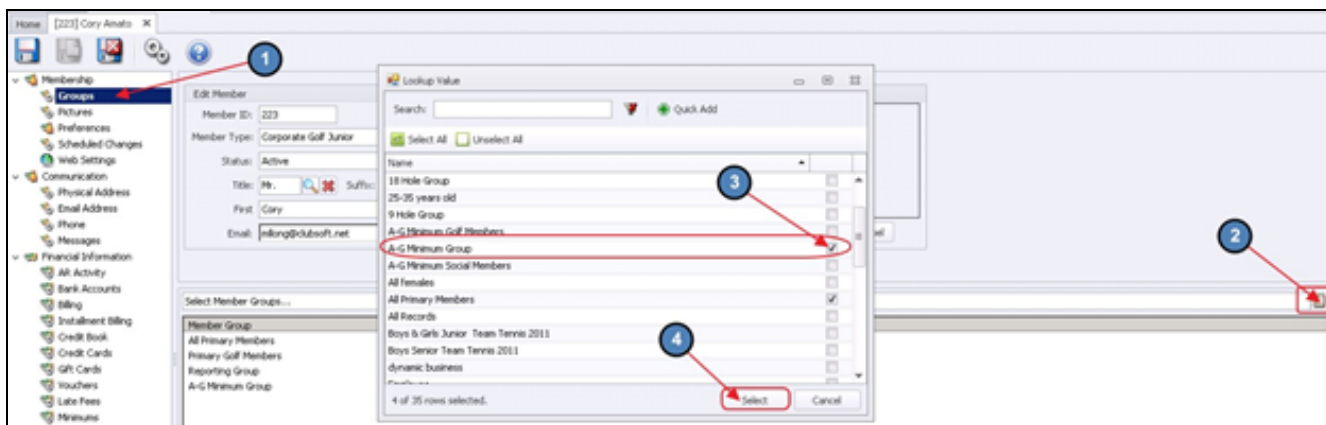


10) To add members to the Minimum group perform either of the following below:

- a) Navigate to the Members tab with the Minimum Group and select the **Member Lookup**, click to select the applicable Members from the Lookup value, and choose **Select** at the bottom of the screen.

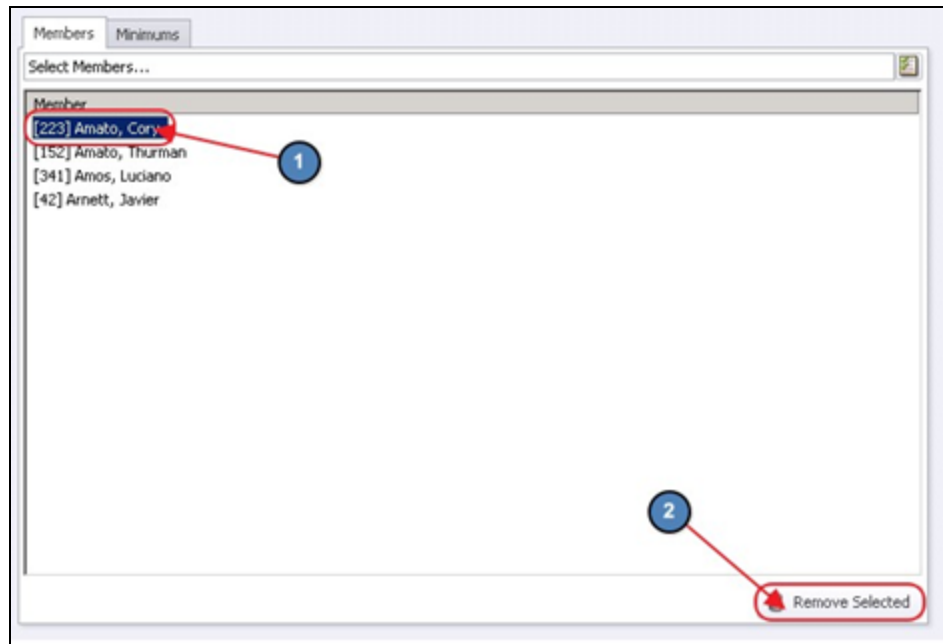


- b) Navigate to the **Groups** tab within the member's profile, select the **Member Group Lookup**, click to select the applicable Minimum Group from the Lookup value, and choose **Select** at the bottom of the screen.



11) To remove a member from a Minimum Group, perform either of the following below:

- a) Highlight the **Member** in question from the selected Member's screen within the Minimum Group and choose **Remove Selected**.

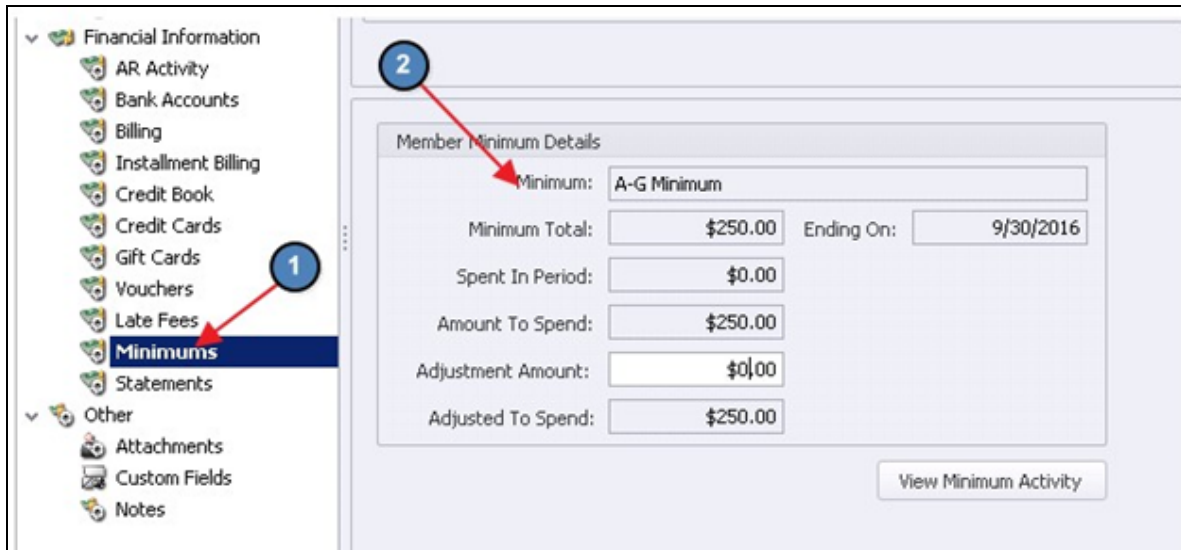


- b) Navigate to the **Groups** tab within the member's profile, highlight the **Minimum Group** in question from the selected Member Group's screen and choose **Remove Selected**.



Membership Profile - Minimums Tab

Once a member is assigned to a Minimum Group, the appropriate Minimum information will populate on the **Minimums** tab within the Member's profile.



The Minimum information attached in this section is dependent on the Minimum attached to the Minimum Group to which the Member is linked.

Non-Editable (from Member's Profile) Member Minimum Details:

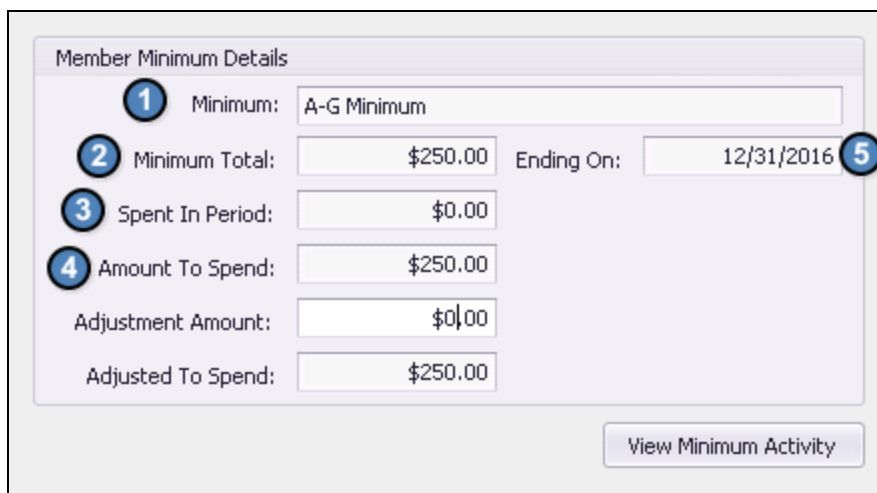
Minimum - Name of the Minimum attached to the Minimum Group.

Minimum Total - Assigned Minimum amount assigned to the group.

Spent in Period - How much the member has spent in the period.

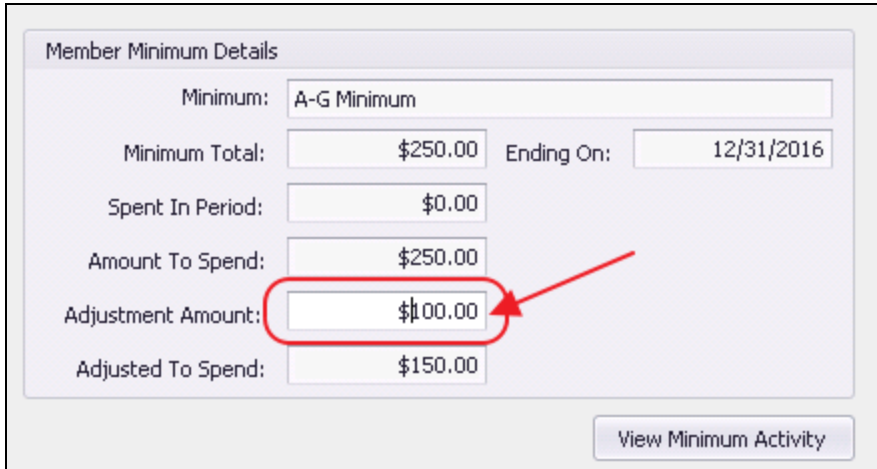
Amount to Spend - How much the member has left to spend in the period.

Ending On - Ending date of the current period.



Adjustment Amount

If for any reason the amount of a member's minimum needs to be reduced on an individual basis, the user can enter an adjustment into the **Adjustment Amount** field. This will reduce the amount the member has to spend to reach their minimum.

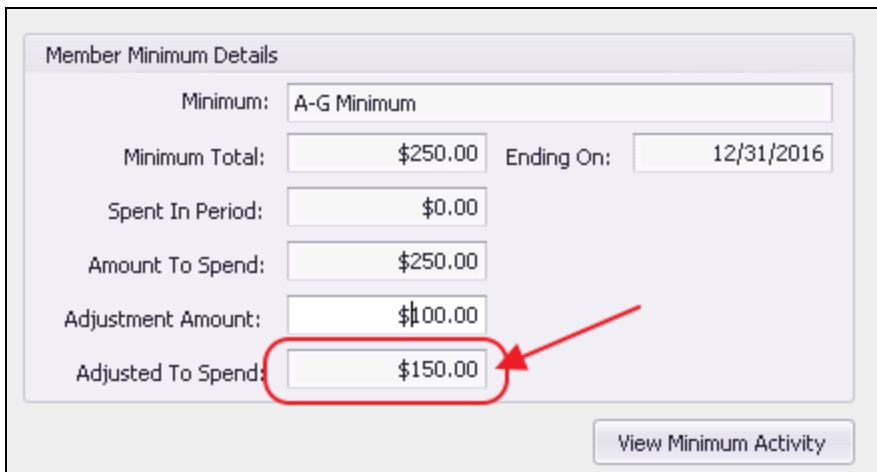


Member Minimum Details

Minimum:	A-G Minimum	
Minimum Total:	\$250.00	Ending On: 12/31/2016
Spent In Period:	\$0.00	
Amount To Spend:	\$250.00	
Adjustment Amount:	\$100.00	
Adjusted To Spend:	\$150.00	

[View Minimum Activity](#)

The **Adjusted to Spend** field will populate with the true reflection of what the member will need to spend in their current period. (Note - this will properly display after adjustment amount has been saved.)



Member Minimum Details

Minimum:	A-G Minimum	
Minimum Total:	\$250.00	Ending On: 12/31/2016
Spent In Period:	\$0.00	
Amount To Spend:	\$250.00	
Adjustment Amount:	\$100.00	
Adjusted To Spend:	\$150.00	

[View Minimum Activity](#)

Important - Please remember to clear any adjustment amounts after Month End has been run. Otherwise, the adjustment amount entered on the member's profile will roll over to the next period. For more information on clearing Minimum Adjustments, please see our **Membership - End of Month** manual.

Minimum Reports

To review a member's Minimum Activity on an individual basis, best practice is to select **View Minimum Activity** on the Minimums tab within the member's profile.

Member Minimum Details

Minimum:

Minimum Total: Ending On:

Spent In Period:

Amount To Spend:

Adjustment Amount:

Adjusted To Spend:

[View Minimum Activity](#)

The Member Minimum Activity Report will launch specific to the member. This report can be filtered down to the very items that counted toward the Minimum by selecting the + sign to the left of the activity or by changing the **Detail Level** of the report.

Member Minimum Activity

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

Start Date: 9/29/2016 Groups: (All) **Detail Level:** Minimum

Minimum Unspent: 0 Member: Cory Amato


Clubsoft Acceptance Server

Member Minimum Activity Report

As Of: 9/29/2016

Member Group: <All>

Member: Amato, Cory [223]



Member	Min To Spend	Min Spent	Unspent
Amato, Cory [223]			
A-G Minimum	\$150.00	\$0.00	\$137.01
+ 426006 - 9/29/2016			
Basket of Chips		\$4.29	
Marys wings		\$8.70	
Invoice Totals:		\$12.99	
Minimum Totals:		\$12.99	
Member Totals:	\$150.00	\$12.99	\$137.01
Totals:	\$150.00	\$12.99	\$137.01

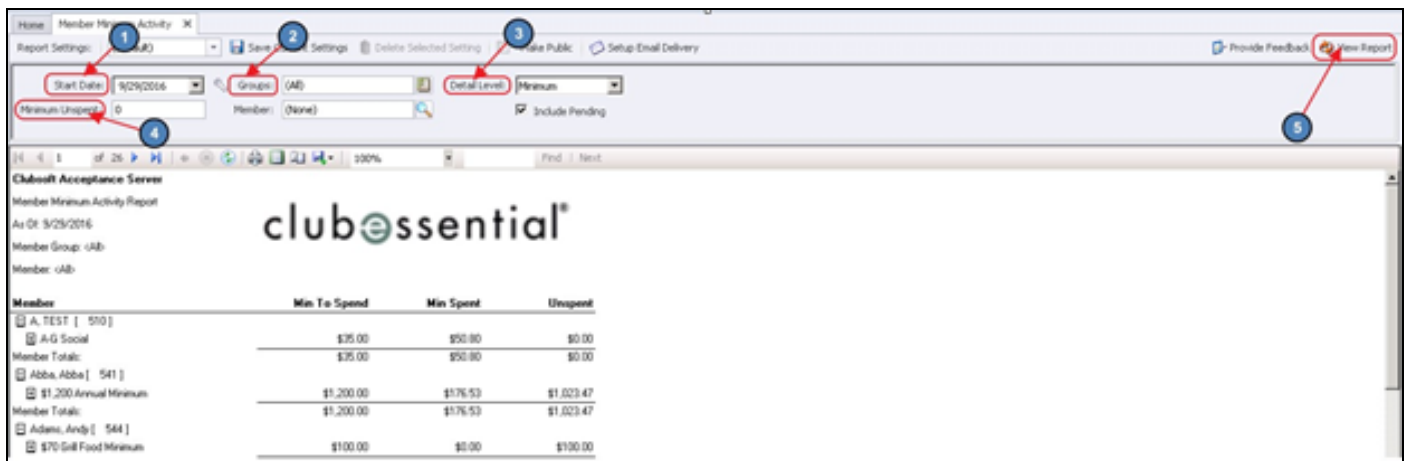
9/29/2016 3:14 PM Page 1/1

The Member Minimum Report can also be run on a global basis to display the Minimum Activity of all members.

To run this report, navigate to the **Interactive Reports** Module, expand **Membership**, and select **Member Minimum Activity**.

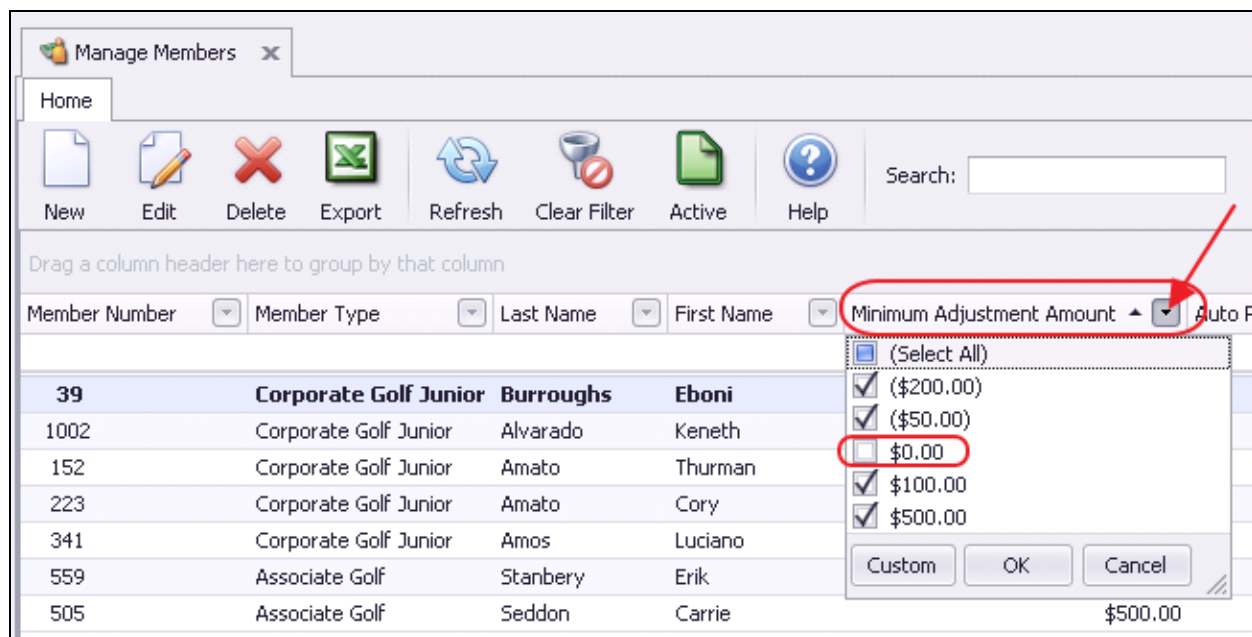


Select the **Start Date**, the **Groups** the user would like to view, the **Detail Level** of the report, specify if the report should only include members with a certain amount of **unspent** Minimums, Select **View Report**.



Best Practices

At least monthly, use the Manage Members Grid to review for Minimum Adjustments that may need reviewed/cleared. Customize columns to include **Minimum Adjustment Amount** field, and then include all amounts other than zero to review records with a minimum adjustment amount that may need adjusted and/or eliminated prior to next statement generation.



The screenshot shows the 'Manage Members' grid with columns: Member Number, Member Type, Last Name, First Name, Minimum Adjustment Amount, and Auto P. The 'Minimum Adjustment Amount' column header has a dropdown arrow circled in red. A dropdown menu is open, showing the following options:

- (Select All)
- (\$200.00)
- (\$50.00)
- \$0.00 (circled in red)
- \$100.00
- \$500.00

Buttons at the bottom of the dropdown: Custom, OK, Cancel.

Member Number	Member Type	Last Name	First Name	Minimum Adjustment Amount	Auto P.
39	Corporate Golf Junior	Burroughs	Eboni		
1002	Corporate Golf Junior	Alvarado	Keneth		
152	Corporate Golf Junior	Amato	Thurman		
223	Corporate Golf Junior	Amato	Cory		
341	Corporate Golf Junior	Amos	Luciano		
559	Associate Golf	Stanbery	Erik		
505	Associate Golf	Seddon	Carrie		\$500.00

Frequently Asked Questions

Instead of decreasing an individual Member's required spend, can I increase it?

Yes, when entering an adjustment amount (on the Minimums tab in the Member profile), enter the adjustment amount as a negative amount to increase the **Adjusted to Spend** field. Entering a positive adjustment will result in a negative impact to the required spend.