



Member Groups

2017 - Spring Edition

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Overview

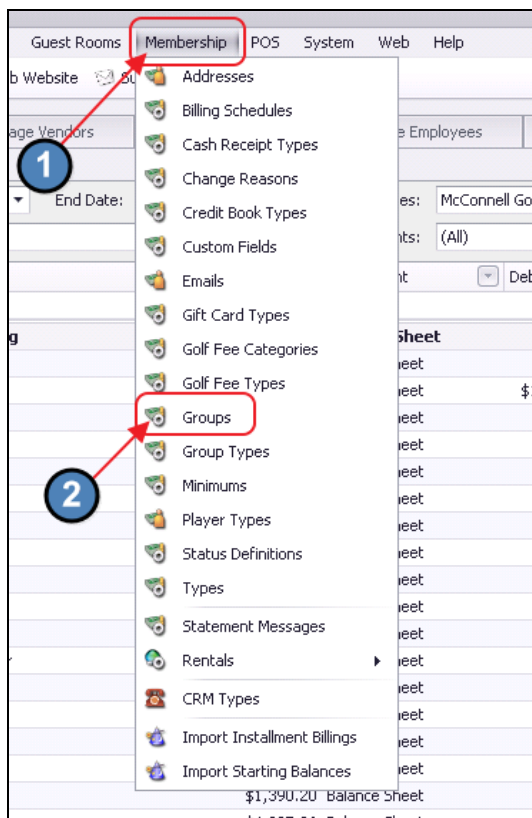
Member Groups are designed as a club specific solution to an array of organizational purposes. Specifically, Member Groups can be used for Billing, Minimum, Mailing/Marketing, and Reporting purposes. In this manual, we will discuss how to create both Static and Dynamic Member Groups.

Use Case(s)

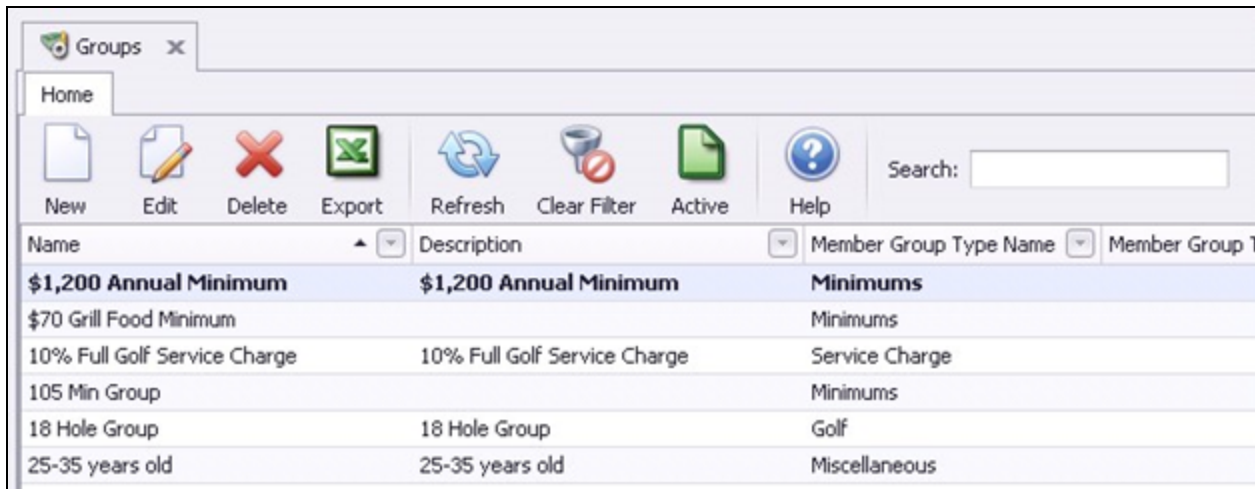
A Club's Member Groups could include the following: All Accounts, Men's Golf Group, Hole In One, Ladies 9 Holes, Senior Golf, Wine and Dine.

Accessing the Tool

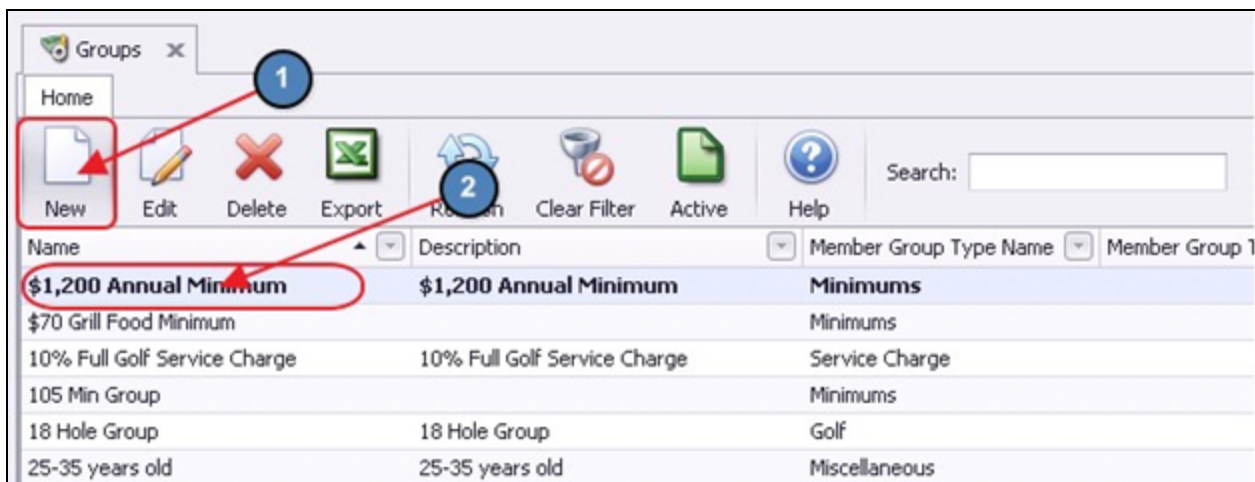
To access **Member Groups**, select **Membership** across the top toolbar, and choose **Groups**.



The **Member Groups Grid** will launch.



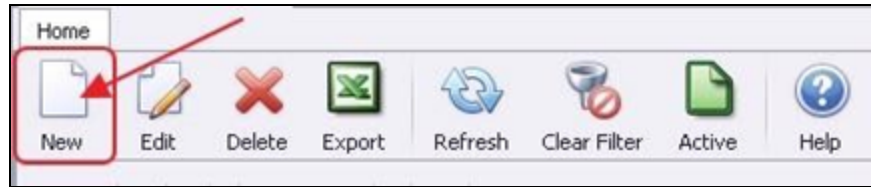
The primary functions associated with managing Member Groups are embedded in the Member Group setup screen, which can be accessed by double-clicking on an existing Group, or clicking the **New** button.



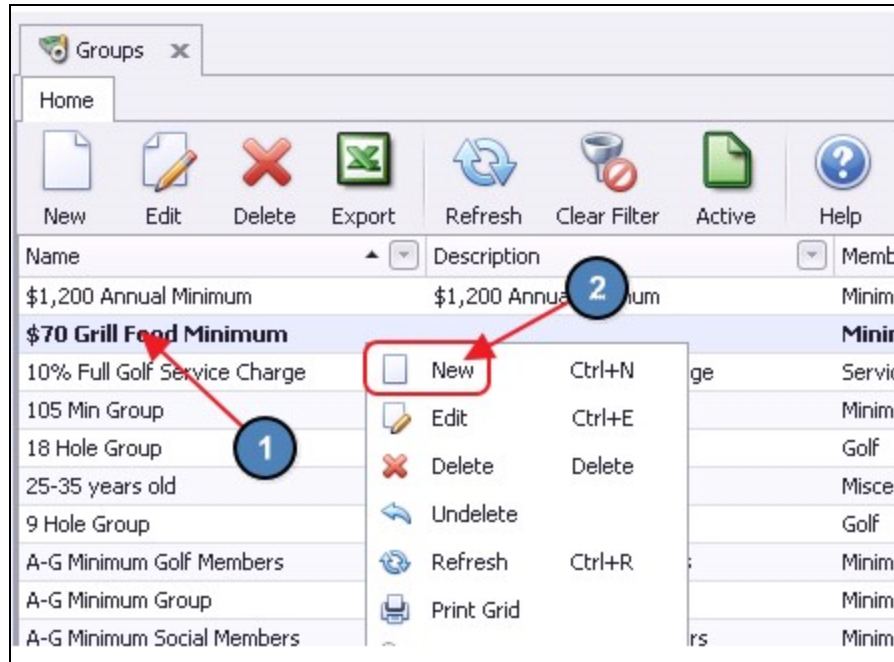
Creating a New Member Group

To create a new Member Group,

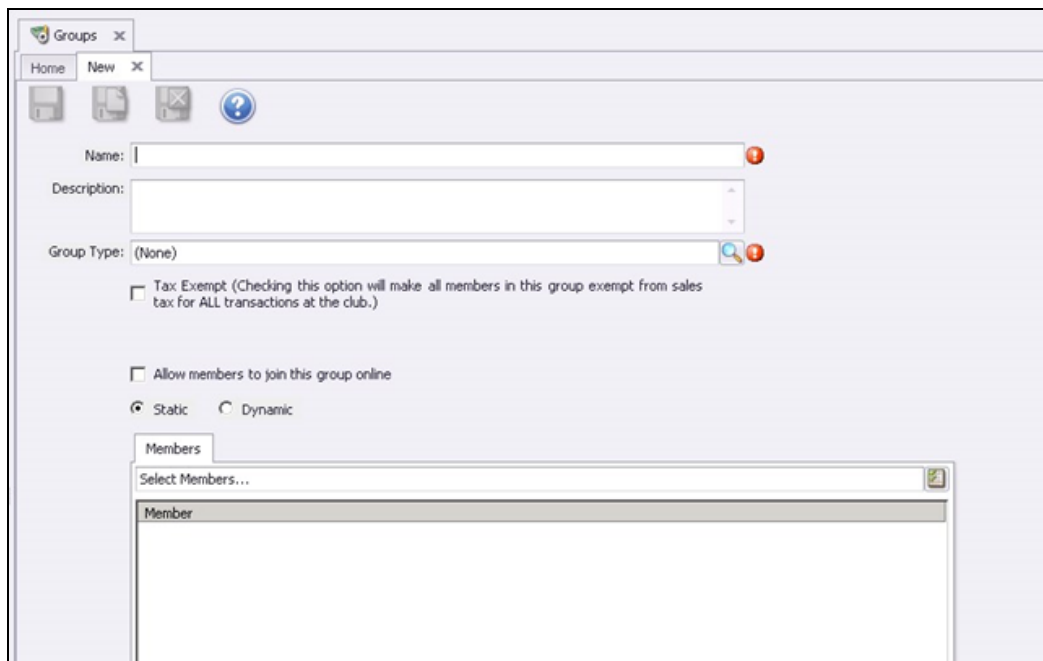
- 1) Navigate to the **Member Groups Grid** and perform either of the following to launch the Member Groups setup screen:
 - a) Click the **New** icon on the toolbar.



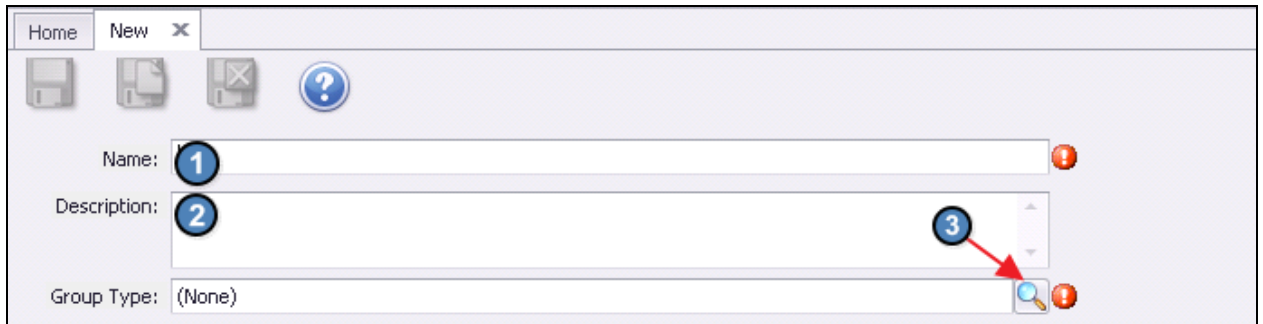
b) Right-click anywhere on the Member Groups Grid and select **New**.



2) The Member Groups setup screen will launch.

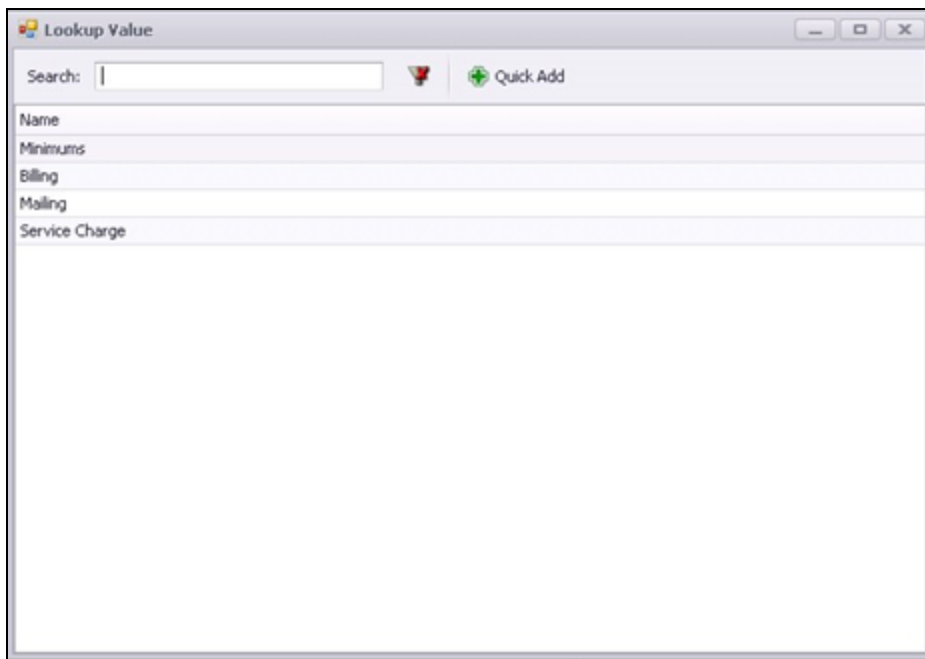


- 3) For all Groups, provide a **Name**, an additional **Description** (if desired), and choose the **Group Type** relevant to the New Group. Note the lookup feature may be utilized to assist with Group Type.



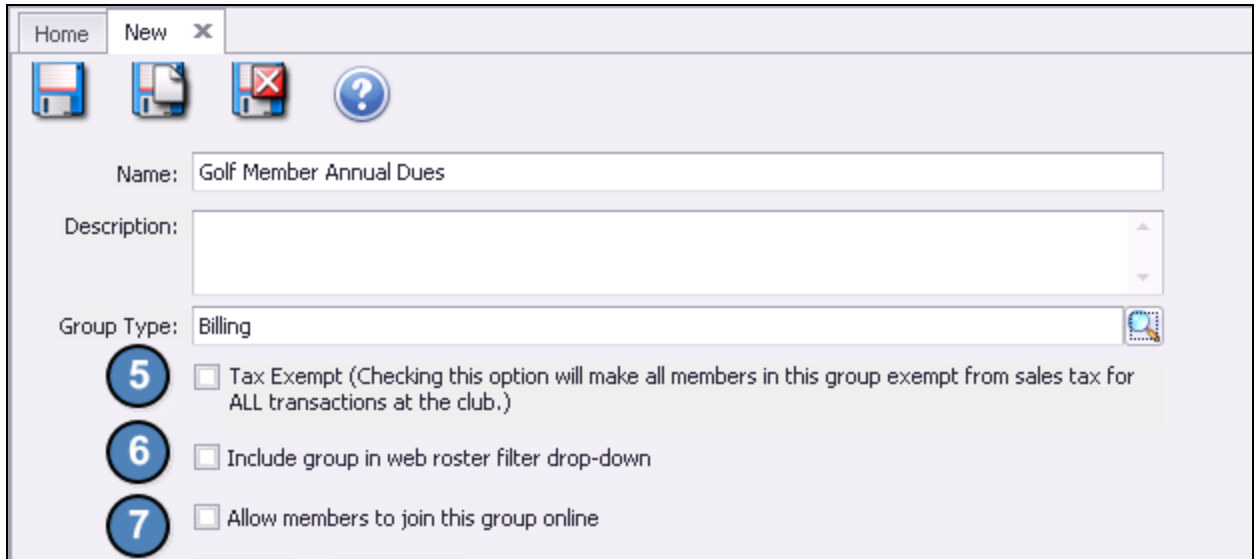
- 4) Once Group Type Lookup Value screen launches, select appropriate Group Type.

Note - the Group Type is an internal reference. Other than Minimums, all Group Types will behave in the same manner. Please refer to our **Minimums** guide for more information on the Minimum Group Type.



- 5) If members within the Member Group should be exempt from tax on all transactions at the club, please check, **Tax Exempt**.
- 6) **Include group in web roster filter drop-down** will indicate that the group should be selectable to sync with Website.

- 7) Please refer to our **Unification – Groups** guide for more information on the **Allow members to join this group online check box**.



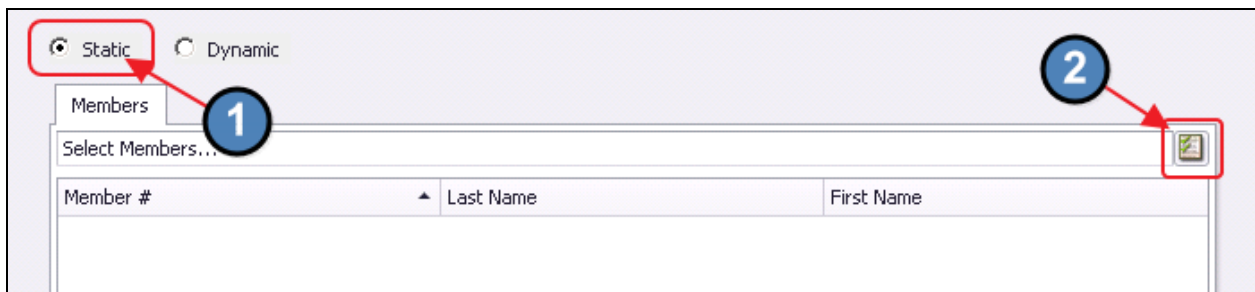
The screenshot shows a web form for creating a group. The form includes the following fields and options:

- Name: Golf Member Annual Dues
- Description: (empty text area)
- Group Type: Billing
- Option 5: Tax Exempt (Checking this option will make all members in this group exempt from sales tax for ALL transactions at the club.)
- Option 6: Include group in web roster filter drop-down
- Option 7: Allow members to join this group online

Static Groups

Static Groups are created by manually adding members to groups and can include any member, regardless of their setup.

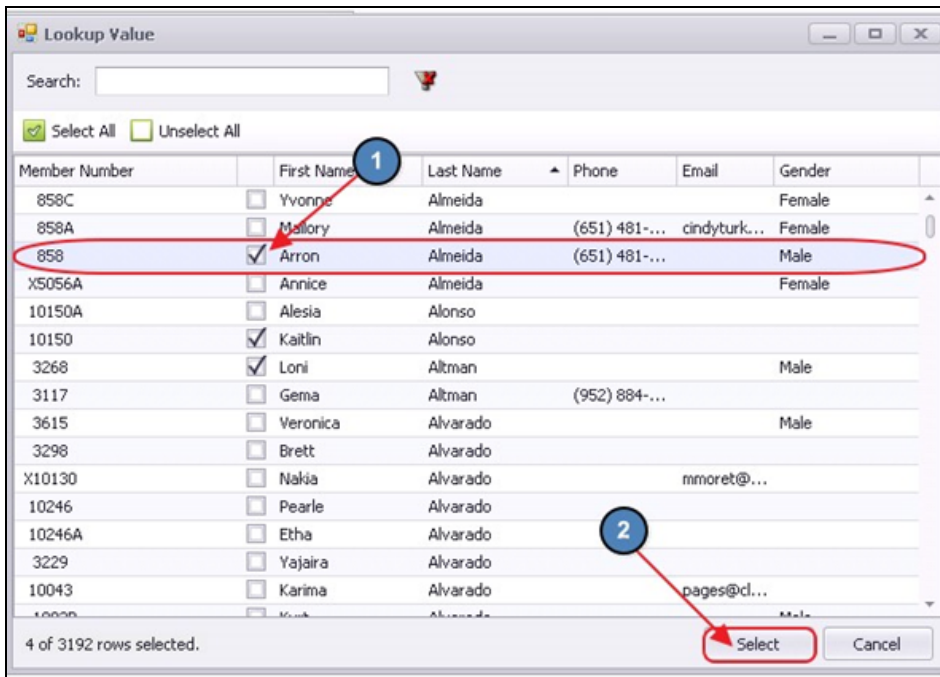
To establish a Static Group, select the **Static** option (Selected by Default), and then add Members to the Group by clicking on the Member selection box. Members can also be added to a Member Group through the **New Member Wizard** or the within a Members **Profile**. Please see our **Membership Management** guide for more information.



The screenshot shows a web form for creating a group. The form includes the following fields and options:

- Group Type: Static Dynamic
- Members: (tab)
- Select Members... (button with callout 1)
- Member selection table with columns: Member #, Last Name, First Name
- Member selection box (button with callout 2)

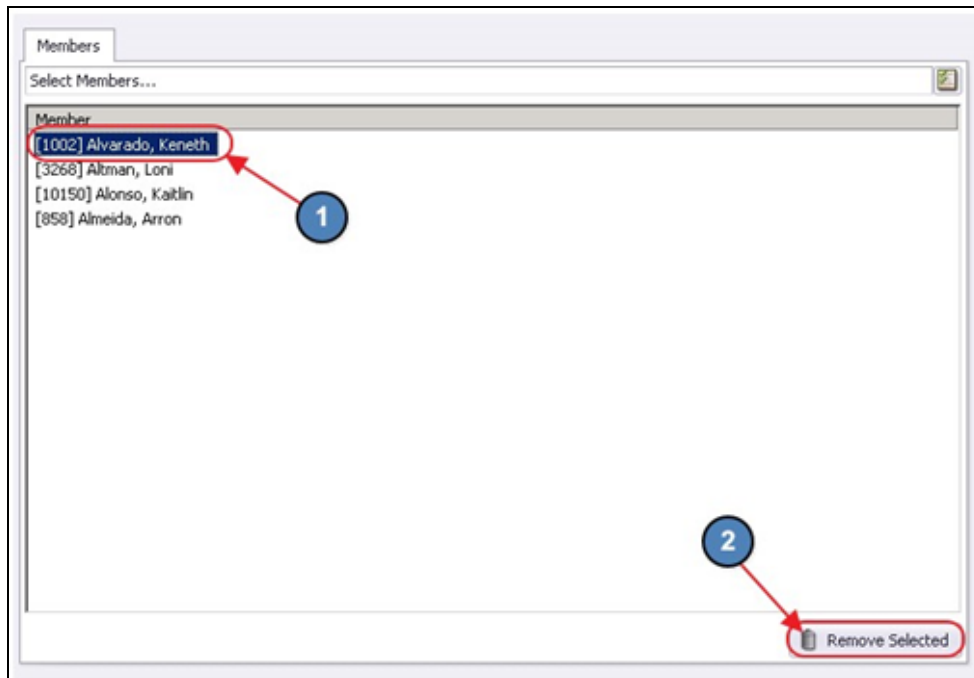
Check **Members** to include in Group, and then, click, **Select**.



The selected members will display in the Selected Members screen.

To remove a member from a Static Group, please perform either of the following below:

- 1) Highlight the **Member** in question from the Selected Members screen within the Member Group and choose **Remove Selected**.



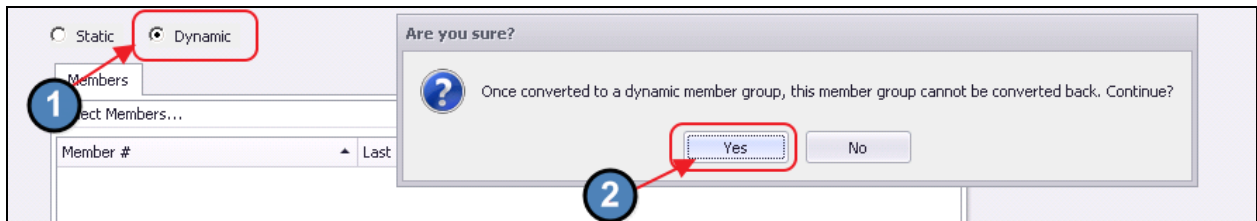
- 2) Navigate to the **Groups** tab within the member's profile, highlight the **Member Group** in question from the Selected Member Groups screen and choose **Remove Selected**.



Dynamic Groups

Dynamic Groups automatically add members based on defined rules/certain criteria for inclusion within the group.

To set up a Dynamic Group, select the **Dynamic** option. Confirm Dynamic Group setup by clicking, **Yes**.



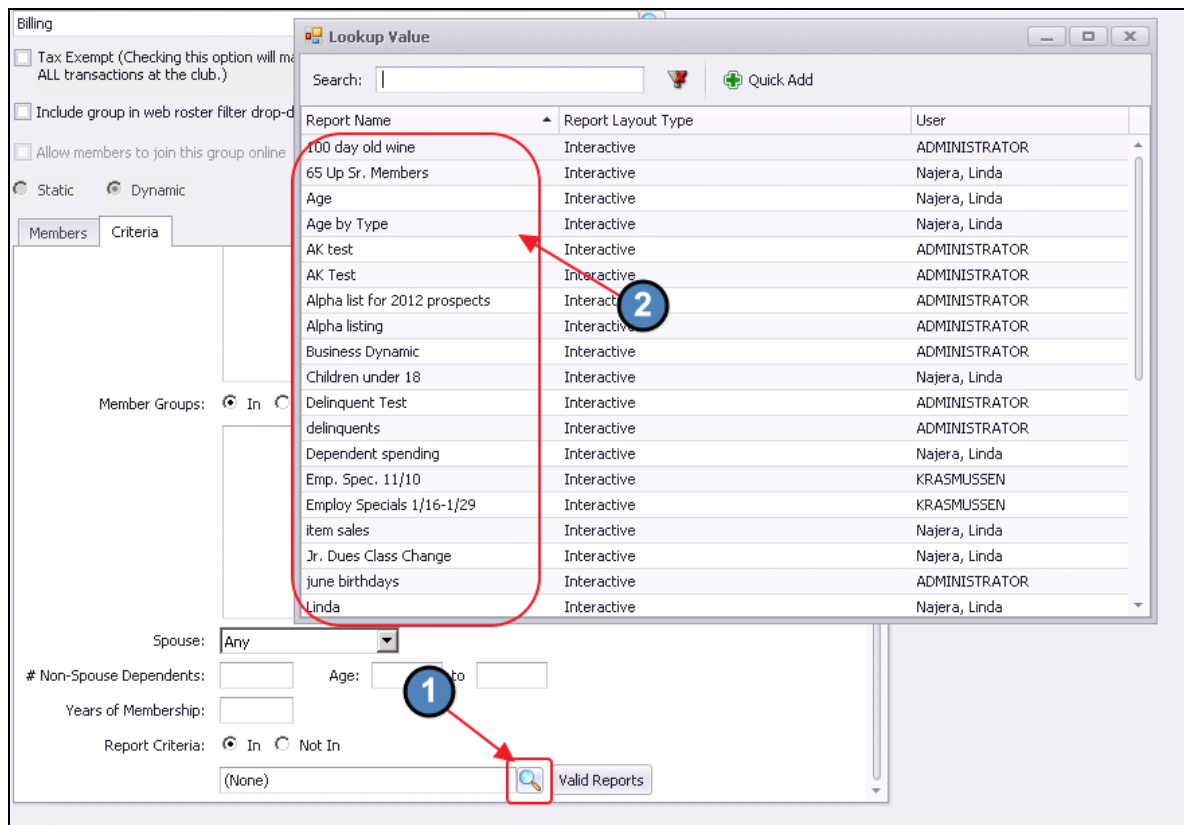
Then, specify parameters/criteria of the Group. Age, Gender, Birth Month, Member Status, Member Type, Member Groups, Spouse, #Non-Spouse Dependents and their respective age ranges, years of Membership, and Report Criteria may all be used to define how Membership within the Group will be generated.

Note: To utilize the **Report Criteria**, click on the **Valid Reports** option to view which reports can be utilized to define Membership.

If a new report is needed, navigate to Interactive Reports, create and save the report (to a recognizable name).

My Saved Reports		
Report	Name	Next Send
All Transactions	Member sales by area	
All Transactions	new layout	
All Transactions	Sales by Server	
All Transactions With Item Detail	test	
AR Aging	Business Dynamic	
Balance Sheet	test2	
Chart of Accounts	Chart	
Chart of Accounts	Chart of Account	
Check Register	May - Aug	
Check Register	Testing	
Daily Sales	Carlie's test	
Delinquent Members	Delinquent Test	
Delinquent Members	delinquents	
Due To Pro Reconciliation	Due to Pro	
Employee Hours	FnB Employee Hours Report	
Employee Hours Worked	Birchwood Test	
Income Statement	F&B monthly	
Income Statement	Income Admin	
Income Statement	Income Statement-Portrait	
Income Statement Consolidated	test 2	
Income Statement Consolidated Rolling	Fiscal Period	
Income Statement Drill Down	Standard Financials	

Navigate back to the Group setup screen, and then choose the new report utilizing the Report Lookup feature.

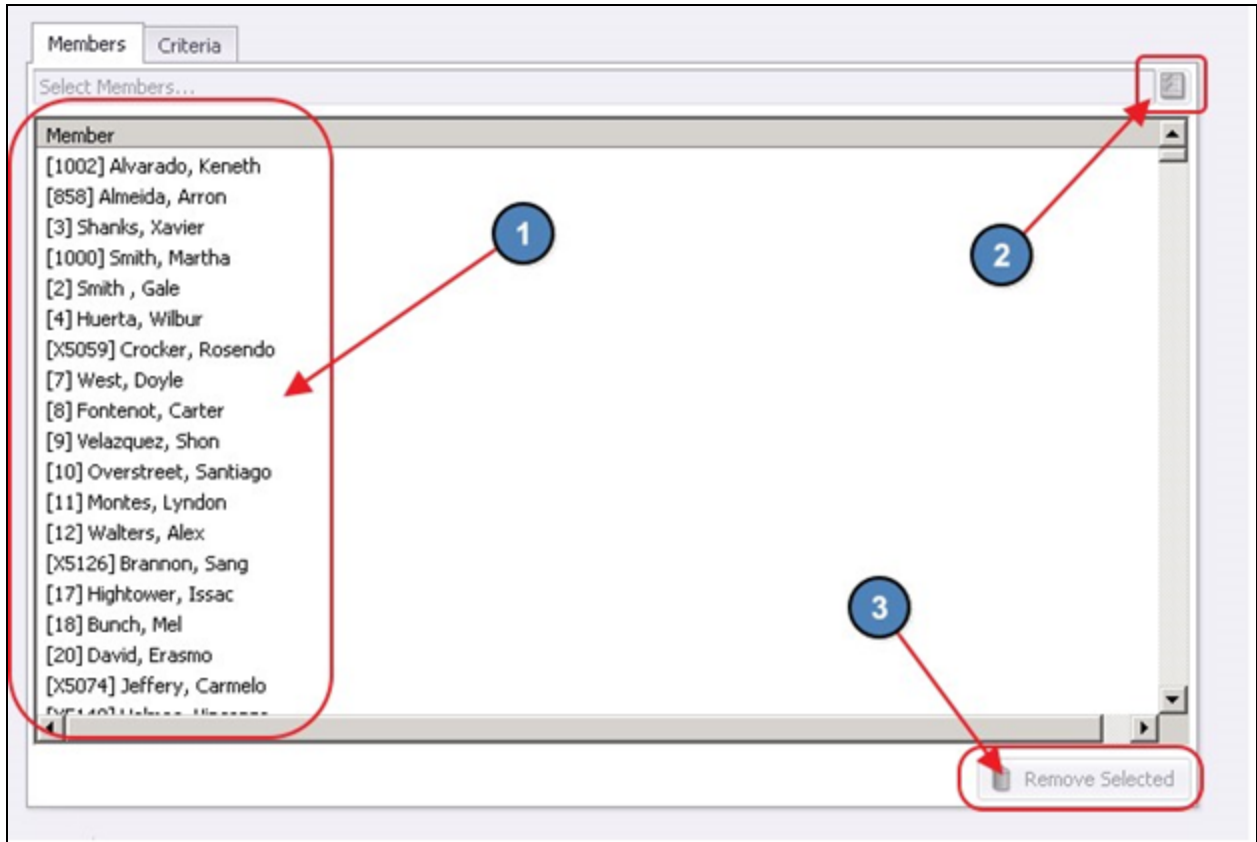


The screenshot shows the 'Billing' group setup interface. On the left, there are options for 'Tax Exempt', 'Include group in web roster filter drop-down', and 'Allow members to join this group online'. Below these are 'Static' and 'Dynamic' radio buttons, and 'Members' and 'Criteria' tabs. The 'Criteria' tab is active, showing fields for 'Spouse', '# Non-Spouse Dependents', 'Age', 'Years of Membership', and 'Report Criteria'. A 'Valid Reports' button is located at the bottom right of the criteria section. A 'Lookup Value' dialog box is open in the center, displaying a table of reports. A red circle highlights the 'Valid Reports' button, and another red circle highlights the 'Age by Type' report in the list.

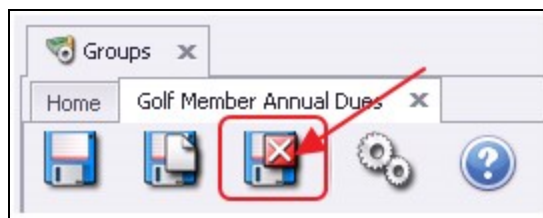
Report Name	Report Layout Type	User
100 day old wine	Interactive	ADMINISTRATOR
65 Up Sr. Members	Interactive	Najera, Linda
Age	Interactive	Najera, Linda
Age by Type	Interactive	Najera, Linda
AK test	Interactive	ADMINISTRATOR
AK Test	Interactive	ADMINISTRATOR
Alpha list for 2012 prospects	Interactive	ADMINISTRATOR
Alpha listing	Interactive	ADMINISTRATOR
Business Dynamic	Interactive	ADMINISTRATOR
Children under 18	Interactive	Najera, Linda
Delinquent Test	Interactive	ADMINISTRATOR
delinquents	Interactive	ADMINISTRATOR
Dependent spending	Interactive	Najera, Linda
Emp. Spec. 11/10	Interactive	KRASMUSSEN
Employ Specials 1/16-1/29	Interactive	KRASMUSSEN
Item sales	Interactive	Najera, Linda
Jr. Dues Class Change	Interactive	Najera, Linda
june birthdays	Interactive	ADMINISTRATOR
Linda	Interactive	Najera, Linda

Members who meet the criteria specified will be listed on the **Members** tab. However, please note that the **Member Lookup** and **Remove Selected** feature have been disabled on

the **Members** tab. The only way a member is added to the group is if they meet the criteria specified, and the only way to be removed from the group is to fall out of the specified criteria.



Be sure to select **Save & Close** when set of the new Member Group is complete.



Best Practices

- Set Dynamic Groups to target the exact group you are looking for, based on specified criteria - ie - Birthday's this month, Member's with an overdue balance, or Member's in a specified Membership type.
- Use Static Groups to manually specify a group of people ie - Board Members, Special Interest Committees, Members with Bag Storage, or Members with Cart Plans for example.

Frequently Asked Questions

Can Members be part of more than one Group?

Yes, Members can belong to any number of Static, Dynamic, and/or mixtures of these Groups.