# **G** Member Types

2017 - Spring Edition

#### User Guide - Table of Contents

<u>Overview</u>

Use Case(s)

Accessing the Tool

Member Type Setup - Tab Overview

**General Information** 

Late Fees

<u>Rules</u>

<u>Overrides</u>

Creating a New Member Type

**Best Practices** 

Frequently Asked Questions

## Overview

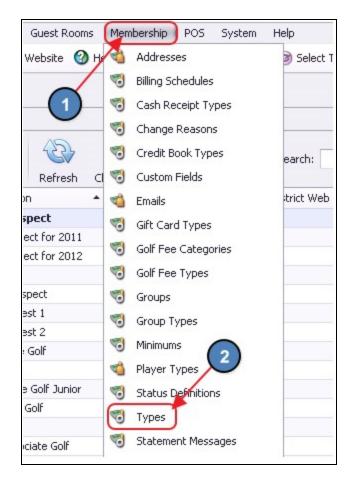
Member Types are used as a solution to classify members for reporting, billing, and marketing purposes on a club by club basis. The Office system allows the user to create an unlimited amount of Member Types depending on the clubs operations.

#### Use Case(s)

A Club's Member types could include the following: Corporate Golf Junior, Associate Golf, Honorary, Intermediate, Social, Tennis, Senior, and Resigned types. Additionally, Clubs usually set up an additional Member type for either the primary Member's spouse or dependent where appropriate (ie - Social-Sp, Social-Dep) to ensure billing is processed appropriately.

# Accessing the Tool

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



The Member Type Grid will launch.

Types 🐨	×								
Home									
New	Edit	X	Export	Refresh	Clear Filter	Active	(2) Help	Search:	<ul> <li>All Words</li> <li>Any Word</li> </ul>
Name		-	Description					Restrict Web Login 💌	Visible On Web Roster 💌 Do N
"A" Prospe	ct		"A" Prosp	ect		0	0	1	0
"A" Prospect	for 201	1	"A" Prospec	t for 2011		0	0	1	0
"A" Prospect	for 2012	2	"A" Prospec	t for 2012		0	0	1	0
"Member" ty	pe test					0	0	0	0
2012 Prospe	ct		2012 Prosp	ect		0	0	0	0
Angie's Test	1		Angie's Tes	t 1		0	0	0	0
Angie's Test	2		Angie's Tes	t 2		0	0	0	0
Associate Go	lf		Associate G	olf		0	0	0	1

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

Types × 1 Home	Export Refresh	2 ter Active	(2) Help	Search:	<ul> <li>All Words</li> <li>Any Word</li> </ul>
Name 🔺 💌	Description	Min Age 🖂 I	Max Age 💌	Restrict Web Login 💌	Visible On Web Roster 💌 Do Not
"A" Prospect	"A" Prospect	0	0	1	0
A" Prospect for 2011	"A" Prospect for 2011	> 0	0	1	0
"A" Prospect for 2012	"A" Prospect for 2012	0	0	1	0
"Member" type test		0	0	0	0
2012 Prospect	2012 Prospect	0	0	0	0
Angie's Test 1	Angie's Test 1	0	0	0	0
Angie's Test 2	Angie's Test 2	0	0	0	0
Associate Golf	Associate Golf	0	0	0	1

## Member Type Setup - Tab Overview

In this section will be review the various tabs within a Member Type.

#### **General Information**

<	😴 Types 🗙	
	Home New X	
	Name: Social	
	Description: Social Membership 5	*
0	Minimum Age: 0 3 Reciprocal Club Is Spouse	
4	Maximum Age: 0 4 Tax Exempt	
	6 Event Class: Member Revenue Company: McConnell Golf	

- 1) Enter a Name and Description (Optional) for the new Member Type.
- 2) Specify if the Member Type should have **Minimum Age**, **Maximum Age**, or both.
- 3) **Reciprocal Club** If checked, the user will be required to enter reciprocity information at the POS when any member within the Member Type is selected.
- 4) **Tax Exempt** If checked, members within the Member Type will be exempt from tax on all transactions completed at the club.
- 5) Is Spouse If checked and the member is a dependent of another member, members within the Member Type will automatically populate into the Spouse Field on the Primary Member's account. Please see our Membership Management manual for more information on the Spouse Field.
- 6) **Event Class** Specify if the Member Type will be considered Member or Non-Member Revenue.
- 7) **Company** Select the applicable Company to be attached to the Member Type.

**Note:** With the new multi-company capabilities, to see any **Members** or **Member Types** associated with a specific Company, the employee must have rights to a **Department** linked to that **Company**.

#### Late Fees

Select the applicable Late Fees on this tab. For more information on Late Fees, please see our Late Fees guide.

Late Fees	Rules Overrides				
Selected V		Name	Y	Percentage To A 🔽	Rate To Apply 🛛 📰
	18% Annually			1.5	\$0.00

#### Rules

The **Rules** tab allows the user to apply certain rules specific to the Member Type. Please see below for a description of each rule:



1) **Do Not Display Members on Member Grid** - If checked, members within the Member Type will not display on the **Manage Members Grid**.

Note: If Do Not Display Members on Member Grid is checked and the user needs to edit a member within the Member Type, simply select the Active button on the Manage Members Grid and hidden members will be highlighted in yellow. Double click on the yellow highlighted member and edit as normal.

📹 Manage	Members 🗙			1	
Home					
New E	🛃 💥 📔 Edit Delete Exp	ort Refresh	Clear Filter	Search Help	h:
Drag a colum Member Num	n header here o grou ber 💎 Last Name		e 💌 Member Type	Auto Payment	Join Date V Ye
		0,	0		
1000B	Abbott	Ben	Dep-Corporate Gol	f 🗌	07/15/1996
1000C	Abbott	Shayne	Dep-Corporate Golf		07/15/1996
X10043	Abel	Cody	Resigned Archive		
10270	Abel	Sharan	Prospect		
xx10067	Acevedo	Mavis	Resigned Archive		
749A	Ackerman	Branden	Sp-Social		12/03/2004

- 2) **Do Not Display Members in POS Lookup** If checked, members within the Member Type will not display in the POS.
- 3) **Use Member Pricing** If the club distinguishes between Member and Retail pricing, check this box and members within the Member Type will receive the Member price rather than the Retail Price.

**Note**: Be sure to specify at the Item level the Retail and Member Price if applicable.

Manage Items 🗙			
Iome Bridgestone B330RX Sleev	e ×		
	6		
Item Setup Inventory	Name:	Bridgestone B330RX Sleeve	Ask For Price
Labels	Description:		Ask For Name
Pictures	Retail Price:	\$14.00	Ask For Quantity
Point Of Sale	Member Price:	\$10.25	Credit Book Eligible
Button Style			Inventoried Item
Print Configuration	Item Category:	Balls	Track Countdown
Rodifers	Qty On Hand:	157.000	Daily Special
Recipe	Average Cost:	\$21.10	Auto Increment Seat
Voucher			Auto Increment Cover
			Disable ability to discoun

- 4) **Restrict Web Login** Only applicable to Axis and CSWeb clients. If checked, members within the Member Type will not be able to login to the website.
- 5) **Visible on Web Roster** Only applicable to Axis and CSWeb clients. This box **MUST** be checked for members within the Member Type to be visible on the website roster.

#### Overrides

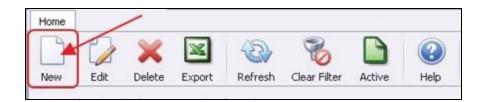
This tab is ONLY applicable to CSWeb clients. Links and Axis clients please ignore this tab. If web payments coming from CSWeb should default to a different Cash Receipt Type for ACH and Credit Card payments, please specify them on this tab. This Override will only apply to members within the Member Type.

Late Fees	Rules	Overrides	
Web ACH	Override:	(None)	0
Web CC	Override:	(None)	

## Creating a New Member Type

To create a new Member Type,

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



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

🧒 Types	x	0.00000		0.0.0.0.0.			
Home							
		×	×	B	8		(?)
New	Edit	Delete	Export	Refresh	Clear Filt	er Active	Help
Name		• 💌	Description		🔺 💌 Mi	n Ag 2 Max	Age 💌
"A" Prospec	t		"A" Prospec	:t		0	0
"A" Prosp	ect for	2011	"A" Prosp	ect for		Children	0
"A" Prospec	:t fo 20:	12	"A" Prospec	t for 20	New	Ctrl+N	0
"Member" t	ype test	-			6 Edit	Ctrl+E	0
2012 Prosp	ect		2012 Prosp	ect	💥 Delete	Delete	0
Angie's Tes	t 1		Angie's Tes	t 1	🔦 Undele	te	0
Annie's Tes	12		Annie's Tes	12	ondoio		n

2) The Member Type setup screen will launch.

Home New	× 💮	
Nar	me:	0
Description	on:	*
Minimum A	ge: 0 🗖 Reciprocal Club 🗖 Is Spouse	
Maximum A	ge: 0 Tax Exempt	
Event Cla Golf Cla	ss: Member Revenue Company: (None)	
Late Fees	Rules Overrides	
Selected V	Name	🏹 Percentage To A 🔽 🛛 Rate To Apply 🖓 📰
	18% Annually	1.5 \$0.00
	Late Fees	0 \$0.00

3) 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
- Late Fees
- Rules
- Overrides (If Applicable)
- 4) Lastly, click Save & Close to complete the setup of the new Member Type.

😴 Тур	es 🗙		1
Home	New	x	
		1	0

### **Best Practices**

- Set up consistent Member Type naming conventions. For instance, if you club is setting up Spouse and Dependent Member types, always designate them consistently (ie Member Type Sp, vs., Member Type 1-Spouse, Member Type 2-Sp, Member Type 3 SPS, and Member Type Dep, vs.. Member Type 1-Depend, Member Type 2-Dep, Member Type 3-Dependent).
- If Members are part of a Member Type that is subject to Late Fees, but they are exempt, ensure to flag the Member as late fee exempt in the Member's Profile, Financial Information tab.

## **Frequently Asked Questions**

#### Can Members be part of more than one Member Type?

A Member can be assigned to only one Member Type. A Member can, however, belong to Multiple Member Groups, so if your Club is setting up a Type to accomplish something that would better be accomplished through a Group, consider setting up a Member Group instead of an additional Member Type.