



Membership Routines

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1. Joining A Member

Once a previous enquiry decides to become a member, the basis of a record should already exist, therefore the front page of the record, will only require changing the 'Type' from **'Enquiry'** to 'Member'; in addition, a **'Membership Number'** will also be required.

It's useful to collect the date of birth, as this can be used to monitor if members are being charged in the correct membership type group. For example, if junior members are up to the age of 16, without the date of birth it would be reliant upon the member to inform that their membership type should change to a full adult or student member. When the data is available the organisation is then in the position to inform the customer of their change in category, in advance, and therefore guard against potential revenue loss.

On a brighter note, the Date of Birth can be used to promote special Birthday promotions, with the possibility of different promotions applying for different age groups.

The Renewal's page of the customer record is the most important to complete when joining a new member, this page mainly contains the financial aspects of the member.

Code	Description	Due Date	Fre	Ins	Amount	Chg To/Frm
G01	7 Day Ind. Ann	01/07/26	DDY	0	0.00	

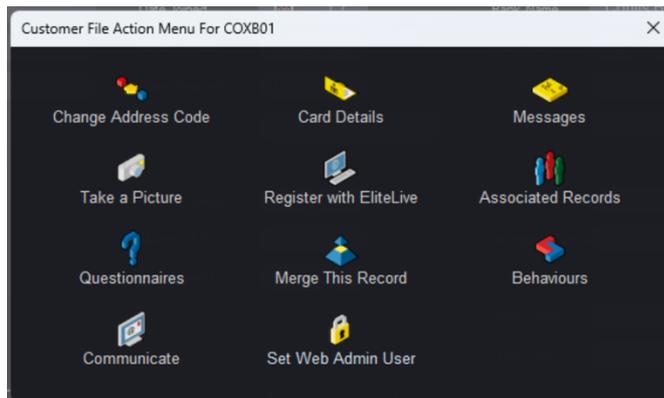
1. Ensure that a membership type is selected - You can get help finding a membership type category, by pressing the Help menu icon  when in the 'M/Type' box
2. Complete the 'Direct Debit' details. Required if using 'Elite' to generate a 'BACS' report, to collect the money from the named accounts, via the 'Banks Automated Clearing System'
3. If the member is paying by direct debit, the 'Direct Debit' field must also be changed to a 'Yes' for their information to be merged into the 'BACS Collection Report'. At this stage you may also wish to bookmark other useful information, as shown above, again these choices can be configured individual to the user's requirements, at the installation stage.
4. Ensure that all the correct charges for the specific member is applied to the record, again, for help in finding a subscription code click in the relevant box, and select help, using the  Help menu function key.

2. Assigning a Membership Card

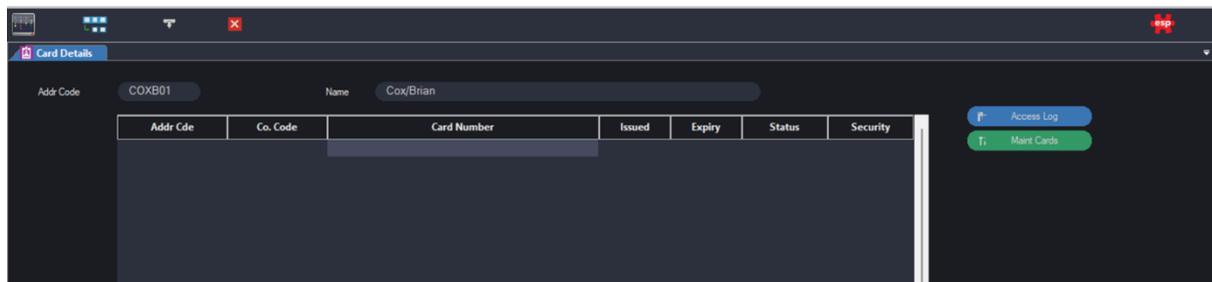
From the Customer Record, select the **Action** menu button:



The Action Menu will be displayed:



Select **Card Details** and the following screen will be displayed:

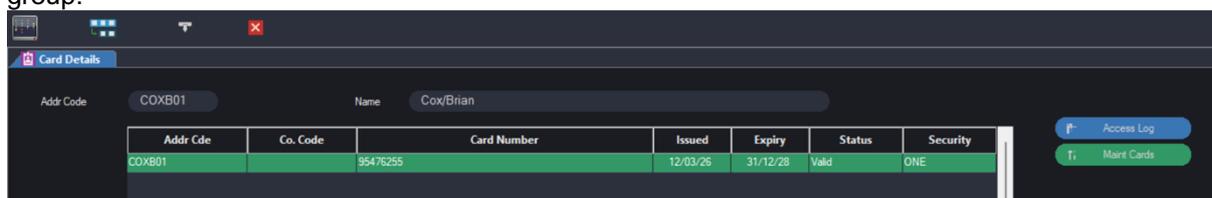


In the Card Number field, enter the Card Number, or if you have a card swipe installed on the terminal, swipe the card through.

Enter the Issue Date as Today's Date and the Expiry Date for the date you wish the card to expire.

In the Status Column, by double-clicking in the field you will be displayed with a drop-down list of options. All Membership Cards which can be used must be allocated to **'Valid'**.

If your system has Access Control enabled you can give this person access by applying a Security group.





Select  **Exit** to return to the Action menu which you can then close by the X at the top right of the menu to return to the Customer Record.

3. Renewing A Member

The Renewal Process in Administration can be split into the following stages:

1. Print Payment Request Letters.
2. Process Payments Received Prior to Renewals Date.
3. Send Reminder Letters and Processing Late Payments.
4. Resignations

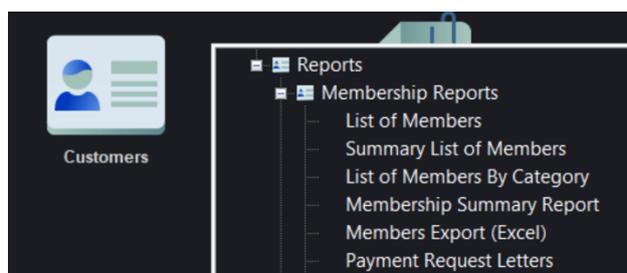
Depending upon how your renewals process operates will depend on how often you complete the above tasks.

If everyone renews their membership on the same date each year, you will only complete this process once a year, however if you run a 'Rolling Membership' procedure, this will be an ongoing process.

Print Payment Request Letters

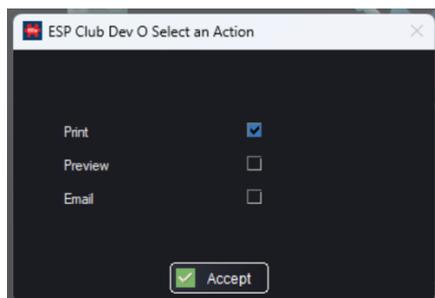
The Payment Request Letters can usually be run up to 60 days prior to the renewal date, although this can be configured differently if required.

From the Desktop select **Customers**, then **Membership Reports** and then **Payment Request Letters**

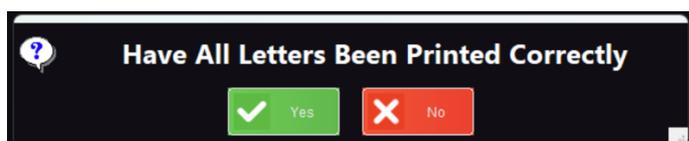


Once a report has been selected, a menu will ask you to specify how you require the report to be processed.

Select the **Print** box to send the print job to your default Printer. You may also select Preview to generate a pdf preview of the letters.



If all letters have been printed successfully, select **Yes**. This will then mark the records in order that the next time you run the Payment Request Letters, the same letters will not print again.

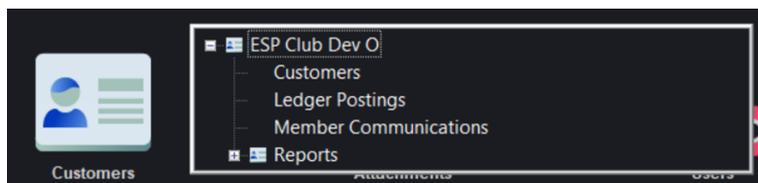


If you experience problems during the letters printing or wish to be able to generate the same letters again, select **No** from the message above. You can then re-run the Payment Request Letters to start the printing again.

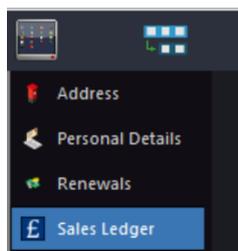
Process Payments Received Prior to Renewals

To process payments received prior to renewals date.

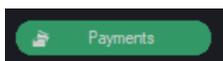
From the desktop select **Customers** and then from the menu select **Customers:**



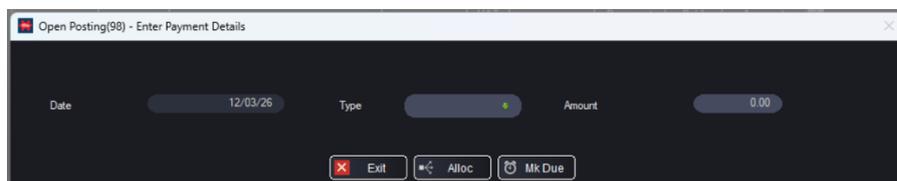
Lookup and select the Member who you wish to manage and within the Customer Record select Sales Ledger from the page options on the left of the screen.



Select the **Payments** action button on the right of the screen:



The following screen is displayed:

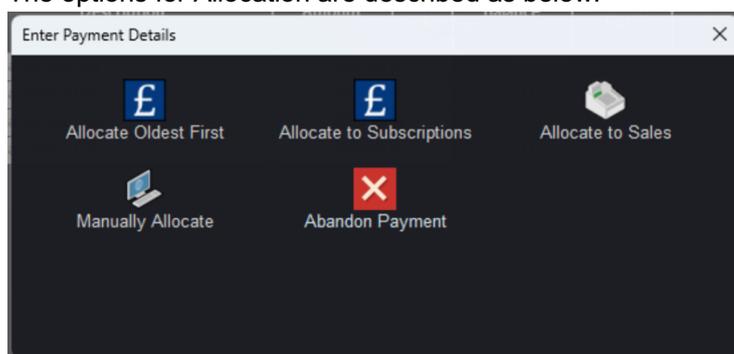


If the transaction you are making relates to a payment which is not currently due, i.e. Membership Fee which is due, but you have received the payment, you may use the **Make Due** function key  to force the forthcoming charges through to the Sales Ledger to enable settlement to occur. Once confirmed, this will then return you to the Payment Screen.

To post a payment complete the following data:

- The 'Date' field in the above window is fixed to the actual system date the transaction is being processed. The date of the transaction cannot be changed to maintain financial integrity and reporting, posting of payments are also not allowed to be displayed in 'Past-Time'.
- Select the type of payment you are posting, from the drop-down box in the centre of the window... Methods available include, Cash, Cheque, Card Payments, and Automated Transfers, these are sub-categorised with the drop-down selector
- Finally enter the amount you wish to post to the ledger, on the far-right hand side. This is usually a positive amount to declare a payment received, but this can be entered as a negative value to post a refunded payment.
- Now select the Allocate button  to select where this payment should be allocated. dependent upon what the transaction relates to on the Ledger.

The options for Allocation are described as below:



Allocate Oldest First - Enables the payment to be allocated to the oldest existing payment first, on the sales ledger.

Allocate to Subscriptions - Will allocate the payment to any items on the 'Sales Ledger' which are linked to revenue groups associated to the 'Subscription Codes', i.e. Membership Fees, Joining Fees, etc.

Allocate to Sales - Will allocate the payment to any items on the 'Sales Ledger' which are linked to revenue groups associated to the sales items, i.e. Retail spend, Food & Beverage items, etc.



Manually Allocate – Provides the opportunity to allocate individual amounts to specific items on the 'Sales Ledger'. The user has more control, over exactly which payments are settled by payments received, as per the customer request. **(ESP Recommended).**

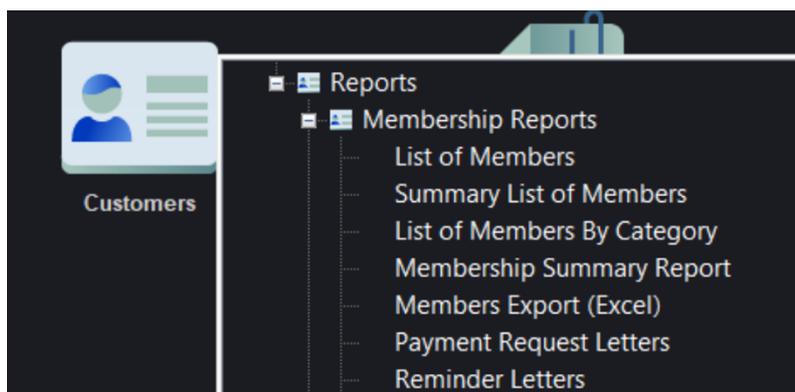
To complete this routine you are required to type in the amount of the payment that you wish to allocate against the required charges, in the Amount Paid column. This is repeated until the full value of the payment is allocated.

Abandon Payment - Quits the existing payment to be posted and returns to the 'Sales Ledger' screen.

Send Reminder Letters

You can automatically print Reminder Letters for those members who have not paid their membership renewal fees.

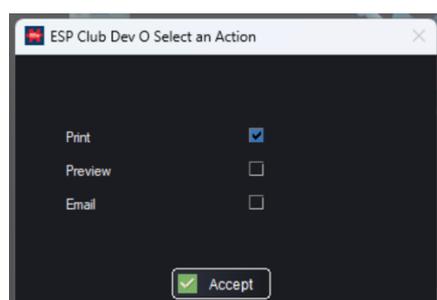
From the Desktop select **Customers** and within **Membership Reports** select **Reminder Letters**.



Once a report has been selected, a menu will ask you to specify how you require the report to be processed:

Once a report has been selected, a menu will ask you to specify how you require the report to be processed.

Select the **Print** box to send the print job to your default Printer. You may also select Preview to generate a pdf preview of the letters.





Processing Late Payments

When payments are received after the renewal date, the charges which are due will already have been posted to the Sales Ledger Account, therefore you can go directly to the Sales Ledger and process the payment following the steps above without the need to Make Due.

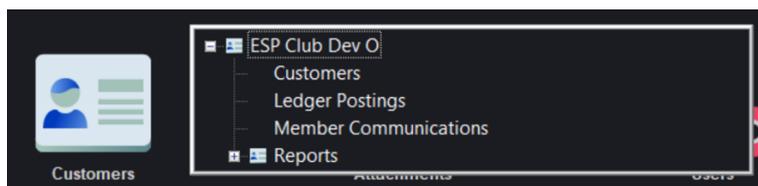
4. Changing Membership Status

Suspending A Member

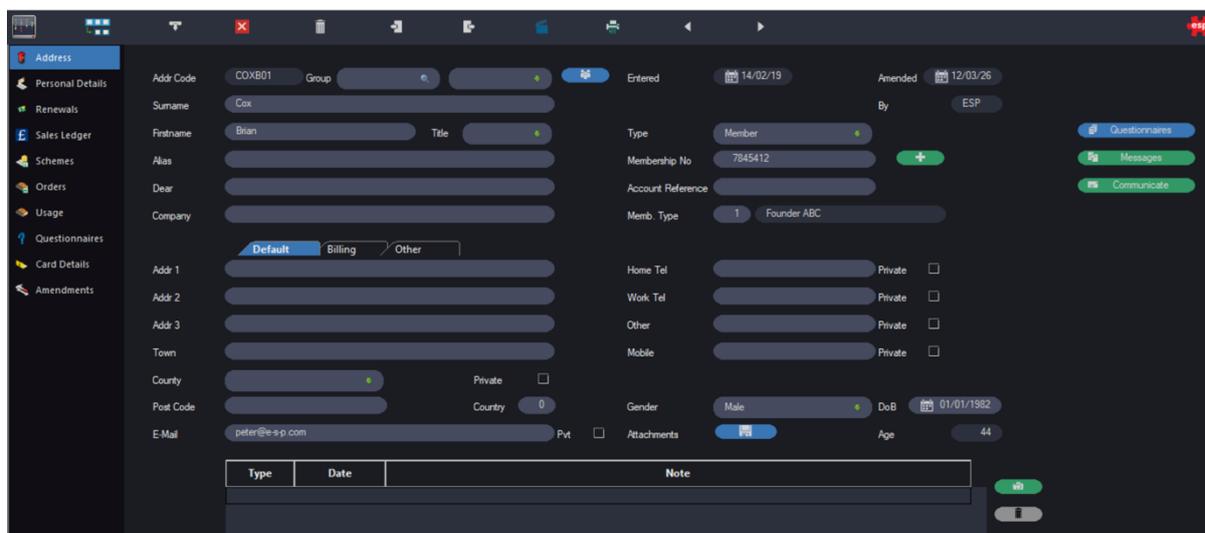
Elite can be configured to automatically 'Suspend' members, if subscription fees are not paid on time, or in the instance that a 'Direct Debit' payment is not received.

However, if for some reason you wish to suspend a member, or the 'Auto-Suspend' functionality is not installed at your site, then it's still very simple to suspend a member:

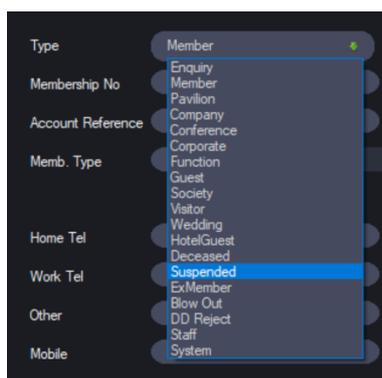
From the desktop select **Customers** and then from the menu select **Customers:**



Lookup and select the Member who you wish to manage and select into a field in the record to edit it.



Select the 'Type' field on the 'Address' page of the customer record and change the 'Type' from 'Member' to 'Suspended'.

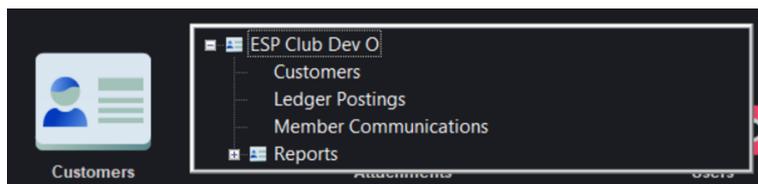


Please remember the implications of suspending a member. In essence the membership card will stop working, which in turn, will remove any provides associated with the membership, including schemes, which supports the ability of the member to charge products to their credit, or levy account.

Reinstating A Member

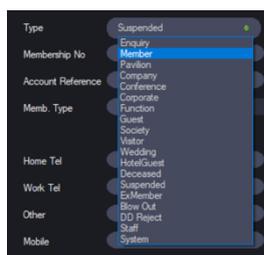
After a member has been suspended, at some point afterwards the situation will arise where it is necessary to either Reinstating or Resign a Member.

From the desktop select **Customers** and then from the menu select **Customers:**



Lookup and select the Member who you wish to manage and select into a field in the record to edit it.

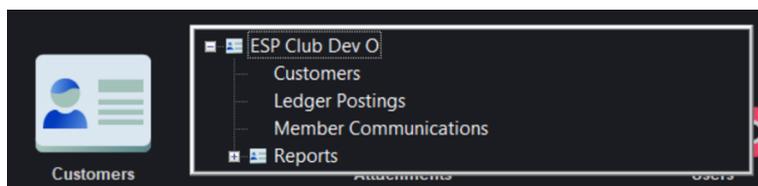
To reinstate a member, simply - select the 'Type' field on the 'Address' page of the customer record and change the 'Type' from 'Suspended' to 'Member'.



Resigning A Member

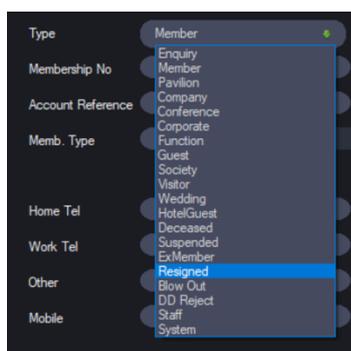
If the member wishes to resign their membership, it is necessary to display this within the system, to enable privileges to be removed from being accessed by the member. The resigned function therefore has a similar effect as the 'Suspended' option.

From the desktop select **Customers** and then from the menu select **Customers:**



Lookup and select the Member who you wish to manage and select into a field in the record to edit it.

Select the '**Type**' field on the 'Address' page of the customer record, and change the 'Type' from either 'Suspended' or 'Member' to 'Resigned':





On the Renewals page of the Customer Record you should also then record a **Date Resigned** and **Reason** which can be referred to for reporting purpose.

The **Memb. Type**, **Renewal Date** and charges in the **Renewal Grid** should also be removed to ensure that a future renewal is not made due.

Code	Description	Due Date	Fre	Ins	Amount	Chg To/Frm
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Rejoining A Member

Once a previous member decides to re-join, the basis of a record should already exist, therefore the front page of the record, will only require changing the 'Type' from 'Resigned' to 'Member'.

Address	Personal Details	Renewals	Sales Ledger	Schemes	Orders	Usage	Questionnaires
Addr Code	COXB01	Group					
Surname	Cox						
Firstname	Brian	Title					
Alias							
Dear							
Company							
Type	Member						
Membership No	7845412						
Account Reference							
Memb. Type	1	Founder ABC					

The Renewal's page of the customer record is the most important to complete when re-joining a member as this page mainly contains the financial aspects of the membership.



Code	Description	Due Date	Fre	Ins	Amount	Chg To/Frm
G01	7 Day Ind. Ann	01/07/26	DDY	0	0.00	

- Ensure that a membership type is selected - You can get help finding a membership type category, by pressing the Help menu button when selected in the Memb. Type box.
- Complete the 'Direct Debit' details. Required if using 'Elite' to generate a 'BACS' report, to collect the money from the named accounts, via the 'Banks Automated Clearing System'
- If the member is paying by direct debit, the 'Direct Debit' field must also be changed to a 'Yes' for their information to be merged into the 'BACS Collection Report'.
- Ensure that all the correct charges for the specific member is applied to the record. For help in finding a subscription code click in the relevant box, and select help, using the Help function key .

A Membership Card can also re-assigned or activated as required following the steps in section 2 above.

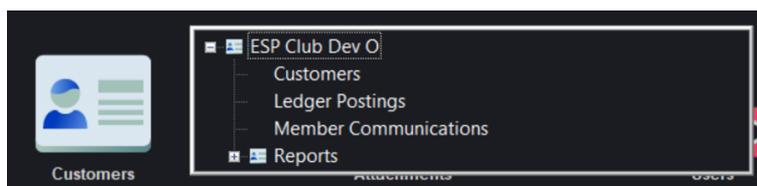
5. Changing Membership Status

There are two main ways in which you can process Statements:

1. Individual Statements.
2. Multiple Statements.

Individual Statements

From the desktop select **Customers** and then from the menu select **Customers:**

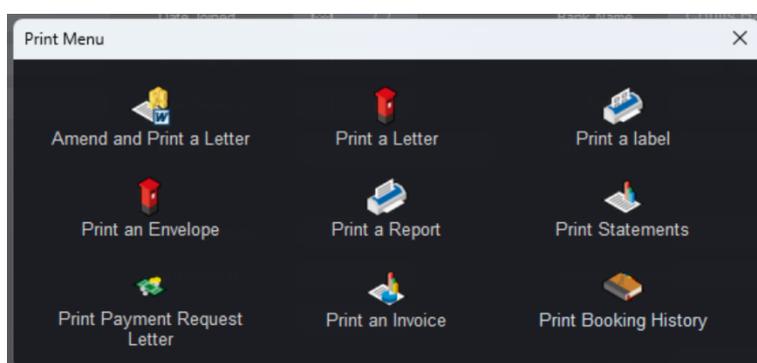


Lookup and select the Member who you wish to manage and select into a field in the record to edit it.

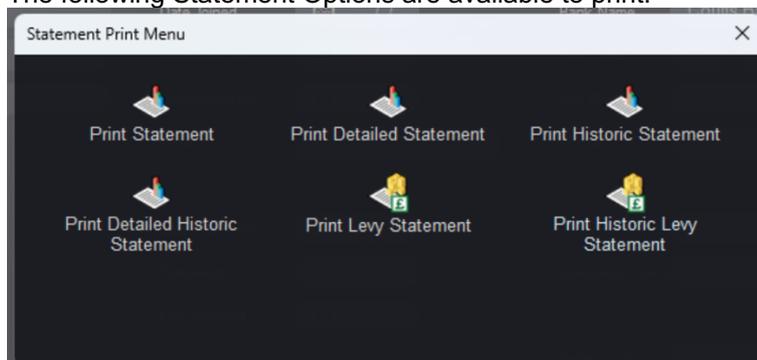
Select the **Print** menu option.



From the Print Menu select the **Print Statements** option:



The following Statement Options are available to print.



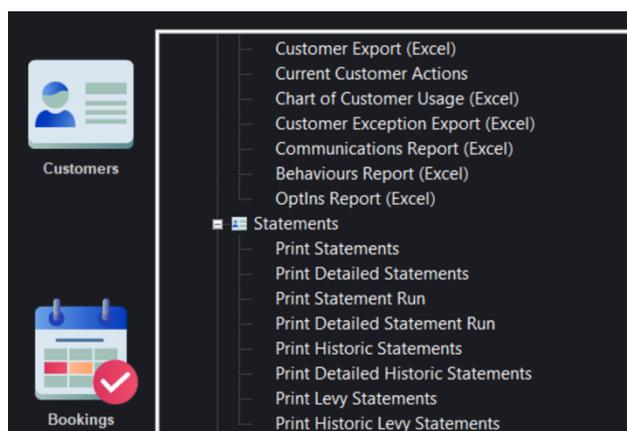
Note that the standard statements will show detail from the last Statement Run that has taken place (detailed in the following 'Multiple Statements' section). Historic Statements allow you to specify a date from which all detail is displayed which allows for you to produce a statement that predates the last Statement Run.

Multiple Statements

Statements can be printed at any time for all records or for a selection. The following section shows you how to print statements for All or a Selection of records.



From the desktop select **Customers** and within **Reports** expand the **Statements** option:



When running any of the options within **Statements**, you will be able to choose specific Customers or print statements for all records. You may then choose to Print, Preview or Email the Statement(s).

Each of the options is generated in a similar manner, so the process of a Statement Run below can be referred to when generating each of these options.

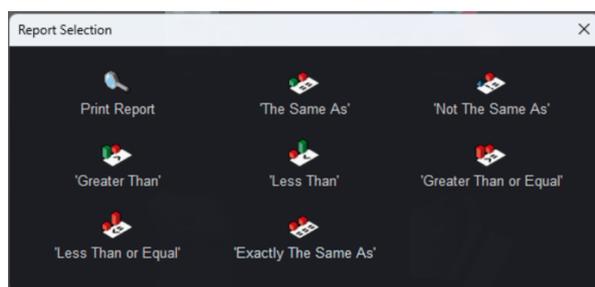
Statement Run

Once the 'Statement Run' is complete, the information will not be displayed on future statements. The Run process will clear down old information and only outstanding balances will be shown.

To access old information after a Statement Run has been completed, the Historic Statement options must be used.

From the Statements Menu Select **Print Statement Run**.

The Report Selection menu will now be displayed which allows you to select to include certain customers or complete a full run of all customers.



To proceed with all records included, select **Print Report**.
The Statements will now be generated and you can select to send them to Print, Preview or Email.

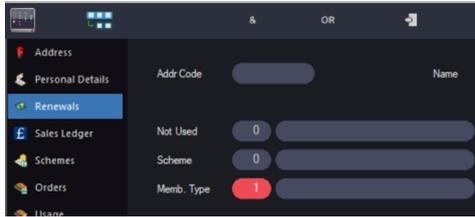
To choose a Selection of Customers you can set the criteria by selecting one of the logic options.

An example to choose all records that have a Membership Type of 1:

Select **The Same As**.



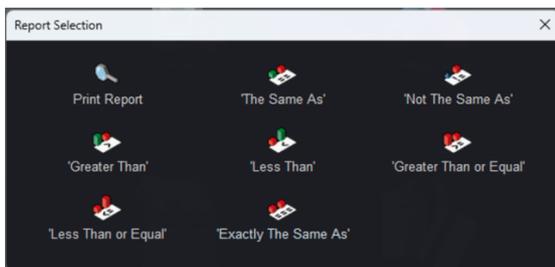
You are then given a blank record where you need to enter the data that you want to match. For this example you would enter a 1 in the **Memb. Type** field and press enter. Ensure that the cell that you have entered the data in is now displayed in red, this indicates that it is included in the choose.



Press the & Menu button:



You are returned to the Report Selection Menu where you can now press **Print Report**:



The Statements will now be generated and you can select to send them to Print, Preview or Email.

Useful Tips for using the Choose Function

- If you wish to select a cell as being blank with no data present as part of the choose, you need to press the Select menu button which will then force the cell to be selected and displayed in red.



- If you are applying multiple selection criteria it is important to select the correct menu option of & or OR depending on whether you want the results to comply with both selections or either.



- **The Same As** works as a partial match, whereas **Exactly The Same As** is an exact match. E.g.
 - **The Same As** an 'A' in the Surname field will return all records with a Surname starting 'A'.
 - **Exactly The Same As** an 'A' character in the Surname field would only return a record if the Surname is only an 'A'.
- You can enter a \$ (dollar symbol) as a wildcard. E.g.
 - **The Same As** '\$hotmail\$' in the Email field will return all records with the text 'hotmail' anywhere within the Email field.