



# V6 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.

The screenshot displays the 'Elite v6 V6 Training Da Customer File' software interface. The window title is 'Elite v6 V6 Training Da Customer File'. The menu bar includes 'SubCdr', 'Exit', 'Delete', 'PrevPg', 'NextPg', 'Action', 'Print', and 'TakPic'. The toolbar contains icons for 'Address', 'Personal Details', 'Renewals', 'Sales Ledger', 'Schemes', 'Orders', 'Usage', 'Card Details', and 'Amendments'. The main form area is divided into several sections:

- Header:** Addr Code: TESTW02, Name: Tester/Web
- Left Panel:** Not Used, Not Used, Memb. Type: 0, Date Joined: //, Date Resigned: //, Locker No: //, Balance: 0.00, Statement: //, Cr. Status: //, Direct Debit: No, DD Code: //, AUDDIS Ref: //, Picture: No
- Right Panel:** Bank Name, Sort Code: 00 00 00, Acc Name, Acc No, Card Type, Exp Date: //, Card No, Profile Code, Home Club
- Table:** A table with columns: Cde, Description, Due Date, Fre, Ins, Amount, Chg To/Frm. The first row is: PL7, Platinum 7, 03/09/18, Yr, 0, 0.00.

The status bar at the bottom shows 'INSERT' and 'V6 Training Da Ver 5.1p On 03/0...'.

1. Ensure that a membership type is selected - You can get help finding a membership type category, by pressing 'F1-Help' 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 'F1-Help' function key.

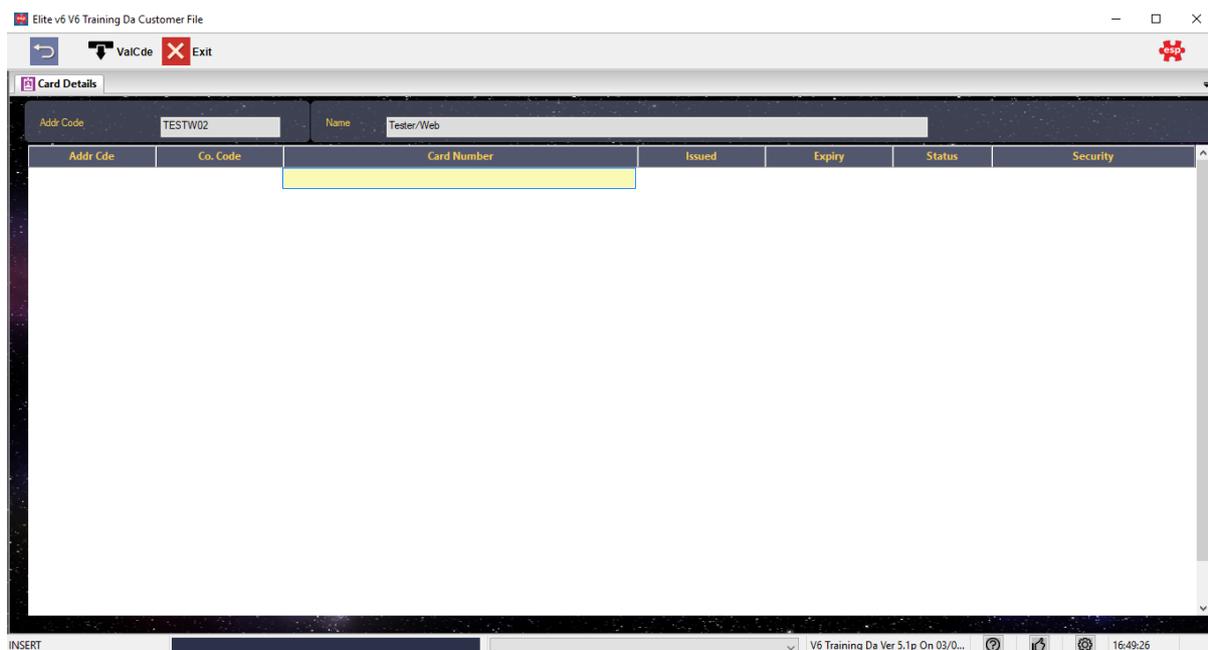
## 2. Assigning a Membership Card



From the Customer Record, select **F7 Action**.



The above menu will be displayed



Select **Amend Card Details** and the above screen will be displayed.



Addr Cde	Co. Code	Card Number	Issued	Expiry	Status	Security
TESTW02		12345678	03/09/18	03/09/18	Valid	

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'.

Select **F2 Exit** to return to the menu, following by **Exit** to return to the Customer Record.

### 3. Renewing A Member

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

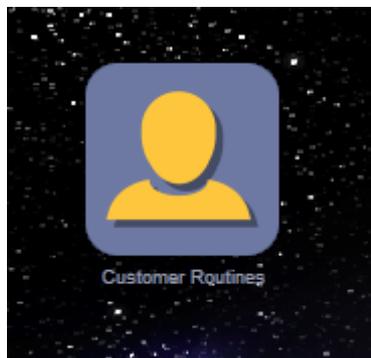
1. Print Payment Request Letters.
2. Process Payments Received Prior to Renewals Date.
3. Send Reminder Letters and Processing Late Payments.
4. Resignations

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

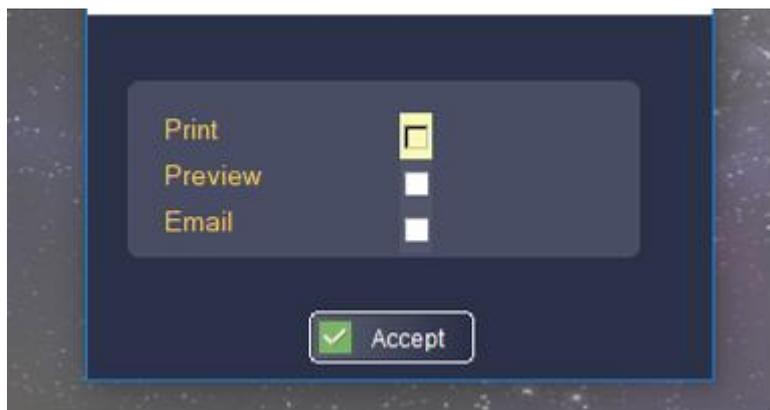
The Payment Request Letters can be run up to 60 days prior to the renewal date.



From the Desktop select **Customer Routines**.

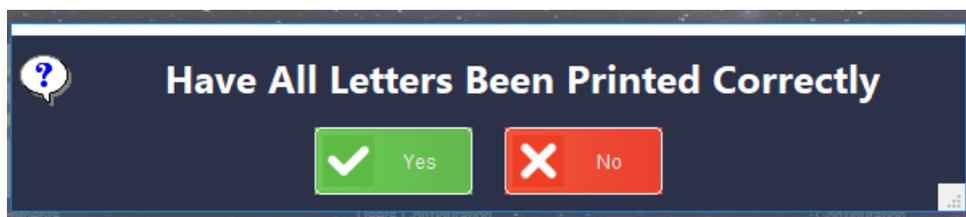


From the drop-down menu, select '**Reports**' then '**Payment Request Letters**'



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. The letters will begin to print to your default Laser Printer. The following message will then be displayed on the screen.

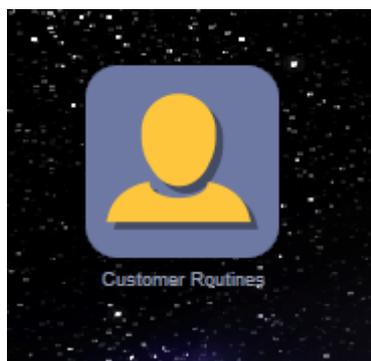


Once all letters have been printed, select **Yes**. This will then mark the records in order that the next time you run the Payment Request Letters, the same letters will not print again.

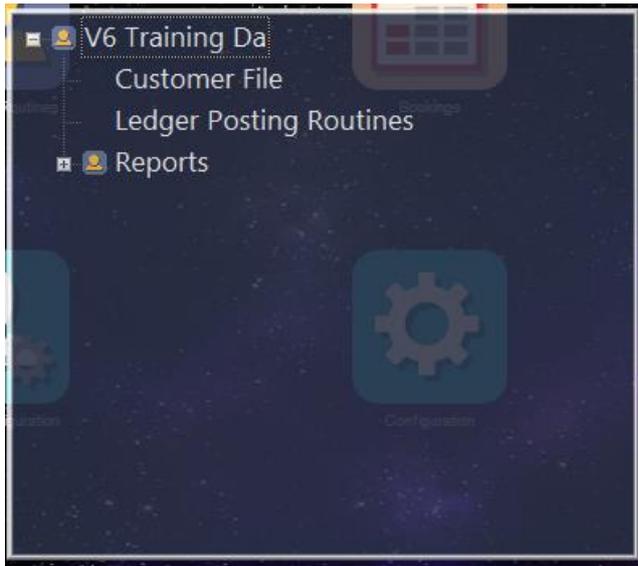
If you experience problems during the letters printing, e.g. Laser Toner runs out, select **No** from the message above. You can then re-run the Payment Request Letters to start the printing again.

## Process Payments Received Prior to Renewals

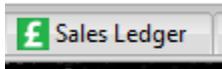
To process payments received prior to renewals date:



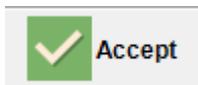
Select – **Customer Routines**



Select – **Customer File**.



Within your chosen customer record, move to the '**Sales Ledger**' tab - fourth tab from the left



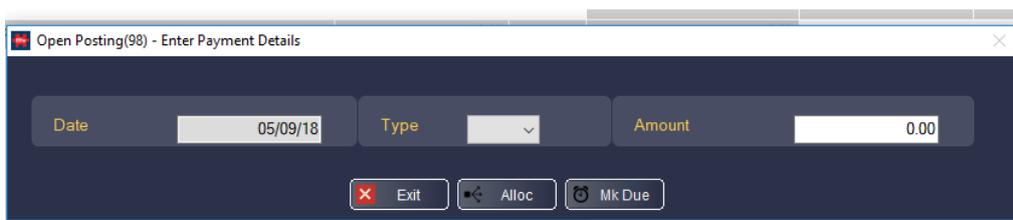
Select – **F3 Accept**



On the '**Toolbar**' click '**F10-CrtPst**' to create a Sales Ledger Posting.



Upon selecting '**F10-CrtPst**' the button becomes '**F10-Paymn**' as shown below;





The '**Sales Ledger Posting Routine**' is now open. To add a new payment to the '**Sales Ledger**' click the '**F10-Paymn**' function key, to specify the type of payment method, and amount.

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 '**F5-Mk Due**' function key, to '**Pull**' the forthcoming charges through to the '**Sales Ledger**' to enable settlement to occur. This will then return you to the Payment Screen.

- 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 due to the way in which the system collects and produces finance reports. If for some reason a specific date is required for a payment, the payment must be entered on the date required, 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 can be a 'Positive' figure, interacted by a full number, i.e. '44.85' or a 'Negative' number, i.e. '-44.85'.
- Now decide where this payment should be placed - dependent upon what the transaction relates to on the 'Sales Ledger', this is actioned by selecting the 'F3-Alloc' (Allocate) button, to be found bottom centre of the window, as shown above.



**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.

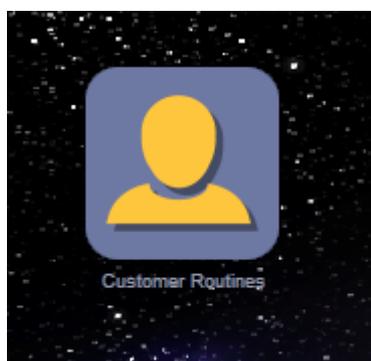
**Allocate to Sales** - Will allocate the payment to any items on the 'Sales Ledger' which are linked to revenue groups associated to the sales items, i.e. Retail spend, Food & Beverage items, etc.

**Manually Allocate** – Provides the opportunity to allocate individual amounts 'Part Payments' 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)**

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

## Send Reminder Letters

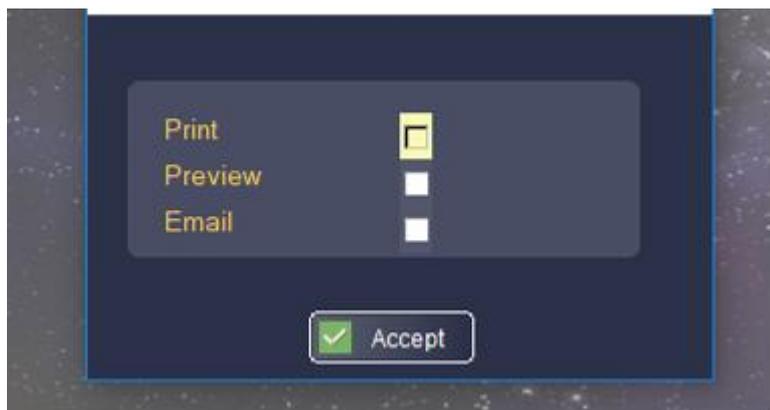
You can automatically print Reminder Letters for those members who have not paid their membership renewal fees.



From the Desktop select - **Customer Routines**.



Select – **Reminder 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. The letters will begin to print to your default Printer.

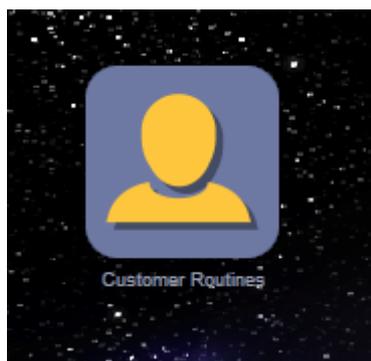
**Processing Late Payments** - When payments are received after the renewal date, the charges which are due will already have been posted to the Sales Ledger Account, therefore you can go directly to the Sales Ledger and process the payment.

## 4. Changing Membership Status

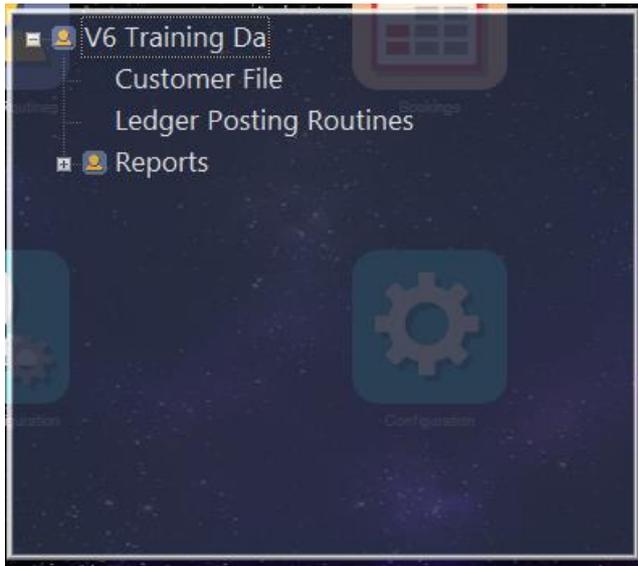
### Suspending A Member

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.

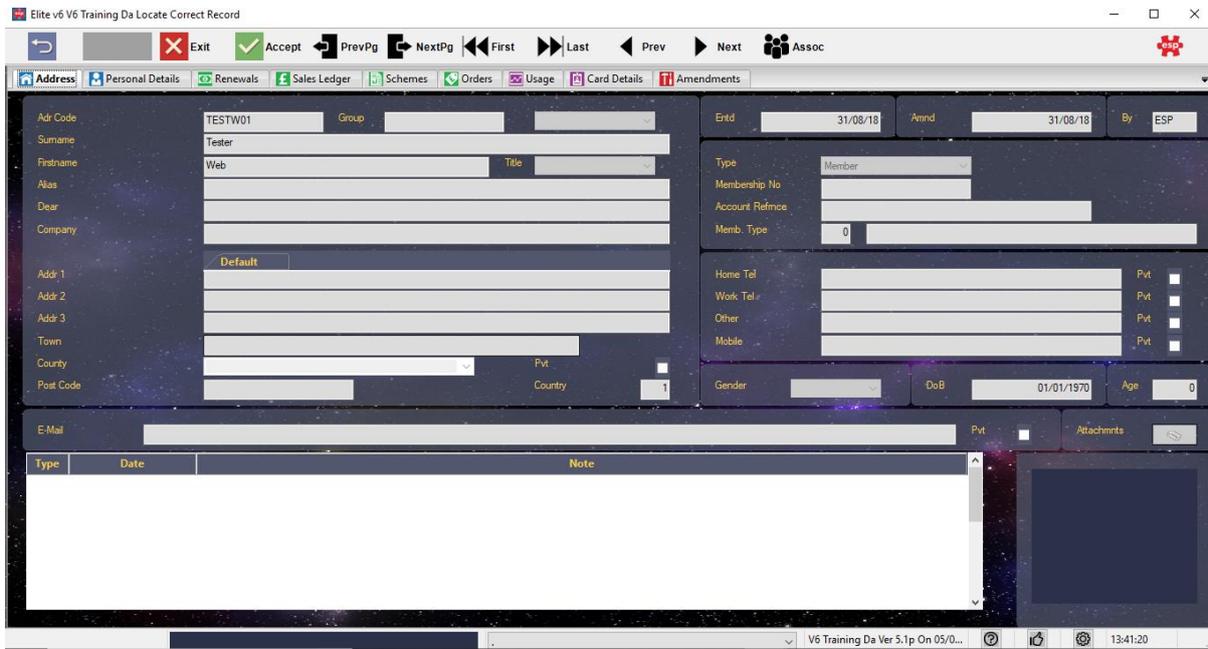
However, if for some reason you wish to suspend a member, or the 'Auto-Suspend' functionality is not installed at your site, then it's still very simple to suspend a member:



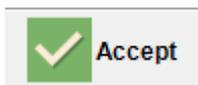
Select – **Customer Routines**.



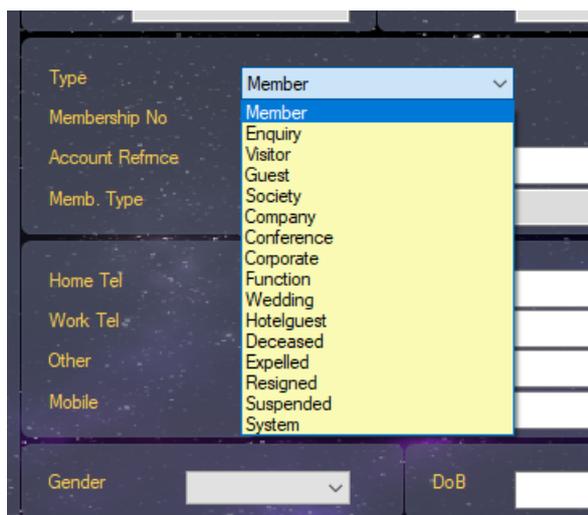
Select – Customer File.



Select the customer record you want to suspend.



Select – F3 Accept.

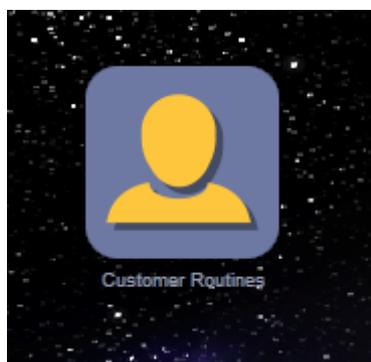


Select the 'Type' field on the 'Address' page of the customer record and change the 'Type' from 'Member' to 'Suspended'.

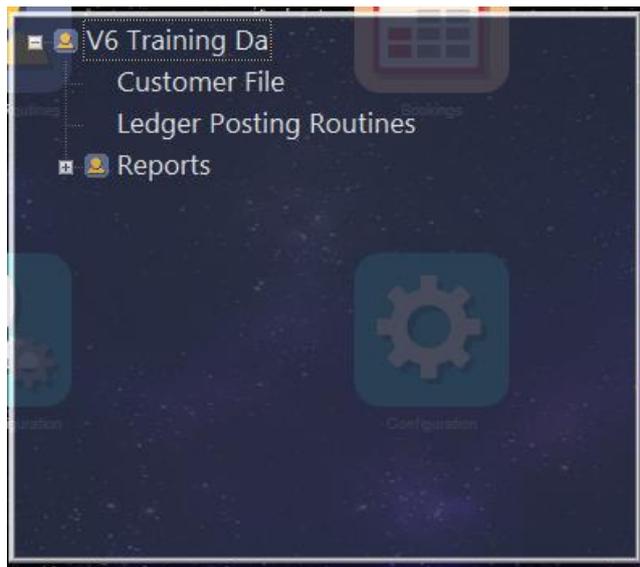
Please remember the implications of suspending a member. In essence the membership card will stop working, which in turn, will remove any provides associated with the membership, including schemes, which supports the ability of the member to charge products to their credit, or levy account.

## Reinstating A Member

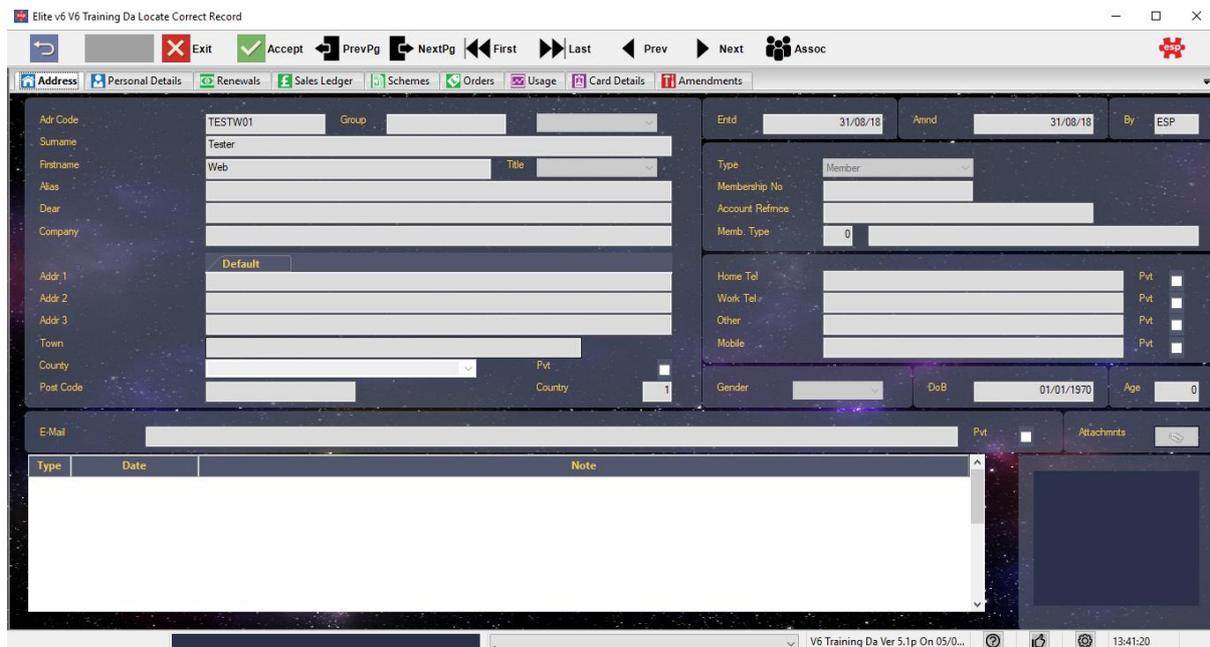
After a member has been suspended, at some point afterwards the situation will arise where it is necessary to either 'Reinstate A Member or Resigm A Member



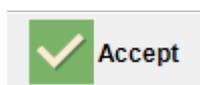
Select – **Customer Routines.**



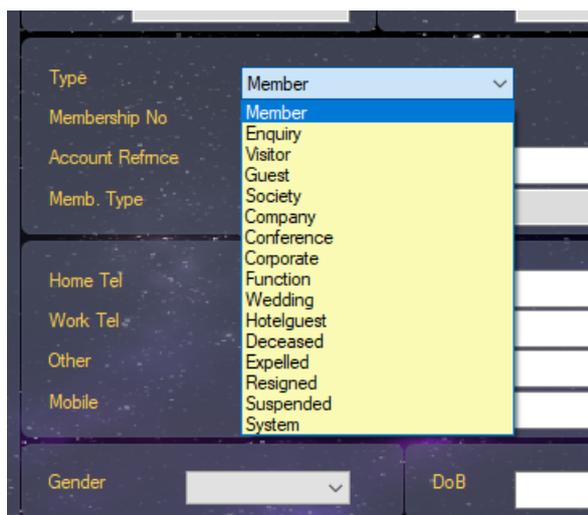
Select – **Customer File.**



Select the customer record you want to reinstate.



Select – **F3 Accept.**

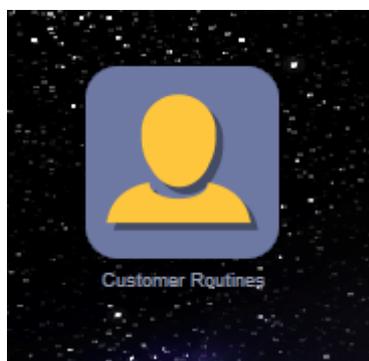


To reinstate a member, simply - select the 'Type' field on the 'Address' page of the customer record and change the 'Type' from 'Suspended' to 'Member'.

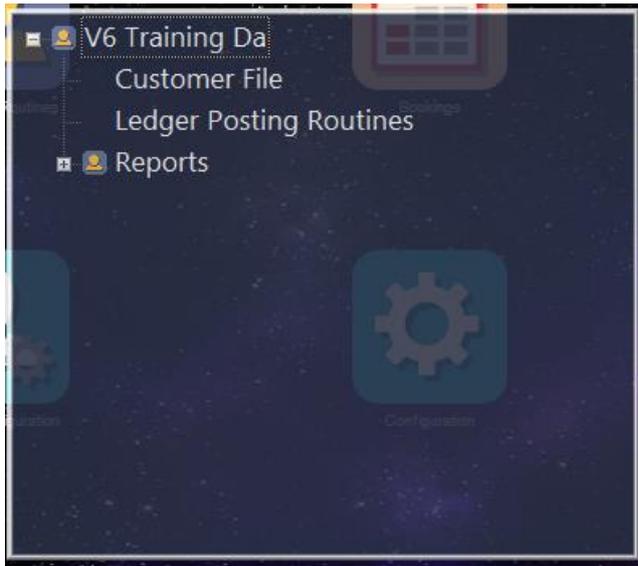
## Resigning A Member

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.

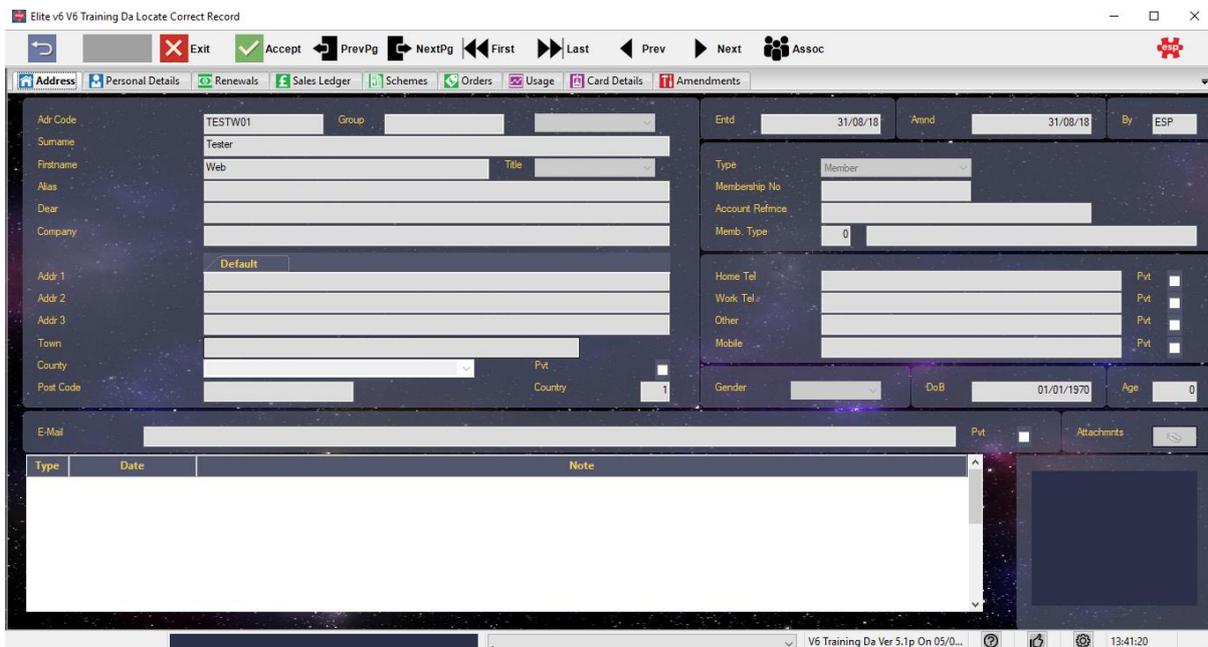
To resign a member:



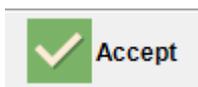
Select – **Customer Routines.**



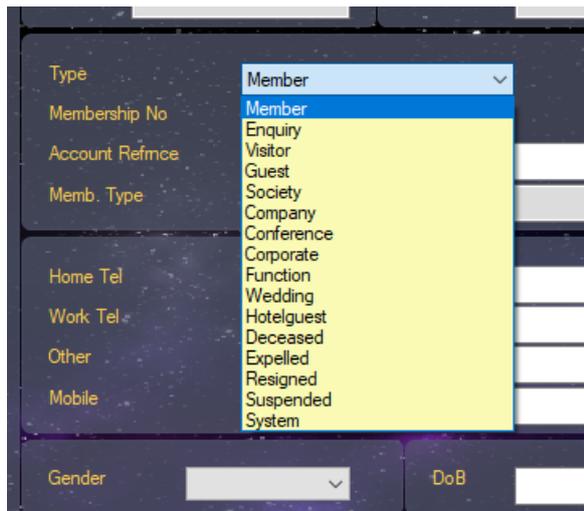
Select – Customer File.



Select customer record you want to resign.



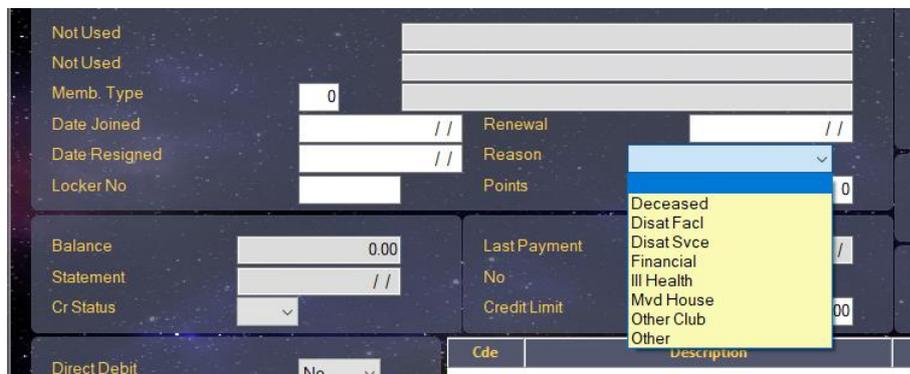
Select – F3 Accept.



The screenshot shows a software interface with a dropdown menu for the 'Type' field. The menu is open, showing a list of options: Member, Enquiry, Visitor, Guest, Society, Company, Conference, Corporate, Function, Wedding, Hotelguest, Deceased, Expelled, Resigned, Suspended, and System. The 'Member' option is currently selected. Other fields visible include Membership No, Account Refmce, Memb. Type, Home Tel, Work Tel, Other, Mobile, Gender, and DoB.

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

You may also want to record details of why the member has resigned, this data can be held on the 'Renewals' page of the customer record, as shown within the blue box below. This data can be especially useful to prioritise improvements, for example, a member may have left due to the Quality of the course, or the quality of the club facilities, in its simplest terms, although these categories can be sub-divided many more times.



The screenshot shows a software interface with a dropdown menu for the 'Reason' field. The menu is open, showing a list of options: Deceased, Disat Fac, Disat Svce, Financial, Ill Health, Mvd House, Other Club, and Other. The 'Reason' field is currently set to 'Deceased'. Other fields visible include Not Used, Memb. Type, Date Joined, Date Resigned, Locker No, Balance, Statement, Cr Status, Direct Debit, Renewal, Points, Last Payment, and Credit Limit.

## 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'.



Elite v6 V6 Training Da Locate Correct Record

Address Personal Details **Renewals** Sales Ledger Schemes Orders Usage Card Details Amendments

Addr Code TESTW02 Name Tester/Web

Not Used  
Not Used  
Memb. Type 0  
Date Joined // Renewal //  
Date Resigned // Reason //  
Locker No // Points 0

Bank Name  
Sort Code 00 00 00  
Acc Name  
Acc No

Card Type Exp Date //  
Card No

Balance 1495.00  
Statement //  
Cr Status //

Last Payment //  
No 0  
Credit Limit 0.00

Profile Code  
Home Club

Direct Debit No  
DD Code  
AUDDIS Ref

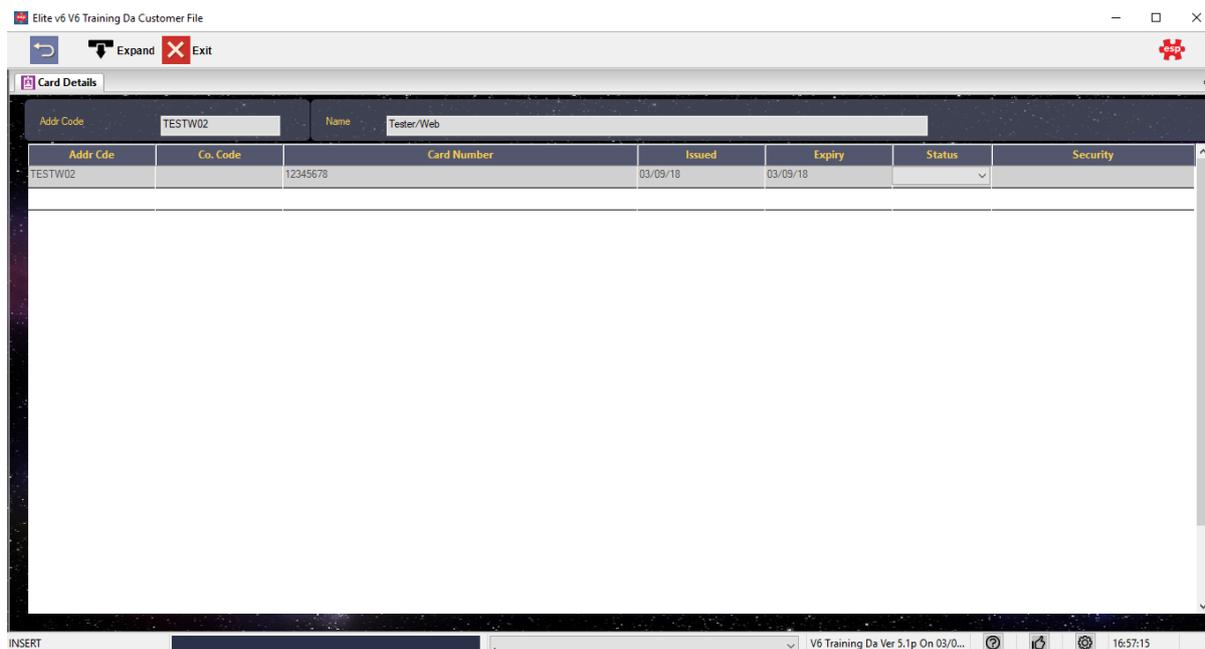
Cde	Description	Due Date	Fre	Ins	Amount	Chg To/Frm
PL7	Platinum 7	03/09/19	Yr	0	0.00	

Picture No

V6 Training Da Ver 5.1p On 05/0... 14:51:45

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.

- Ensure that a membership type is selected - You can get help finding a membership type category, by pressing 'F1-Help' when in the 'M/Type' box as shown above
- 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 'F1-Help' function key.



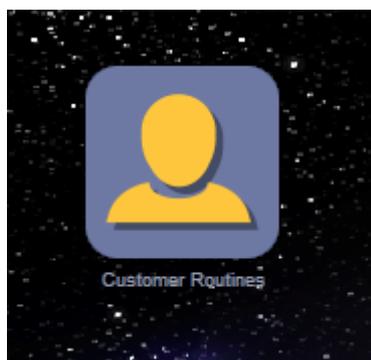
On the card details page of the customer record, complete the information required to issue a membership card to the new member. In the majority of circumstances the 'Card Number' will consist of a six digit number - the issue date shown will be the date of issue, with the expiry date set to the same date in the year 2020 - Although the membership will renew either on a yearly or rolling basis, the card can be used continuously, ensure that the card 'Status' is set to 'Valid' in order for the card to be fully functional.

## 5. Changing Membership Status

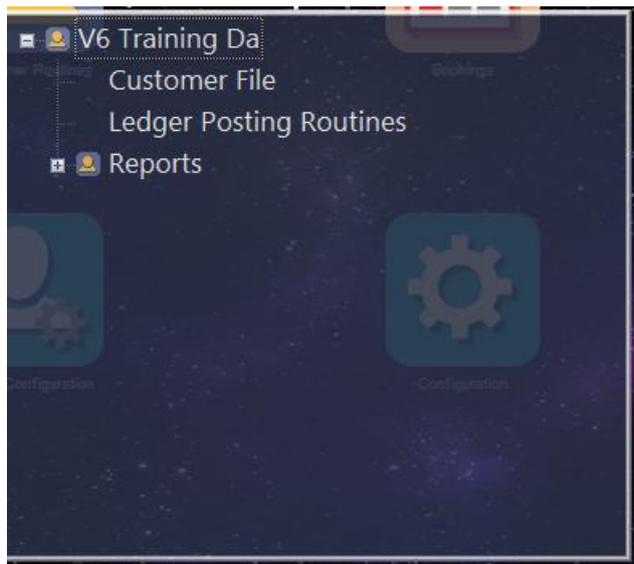
There are two main ways in which you can process Statements:

1. Individual Statements.
2. Multiple Statements.

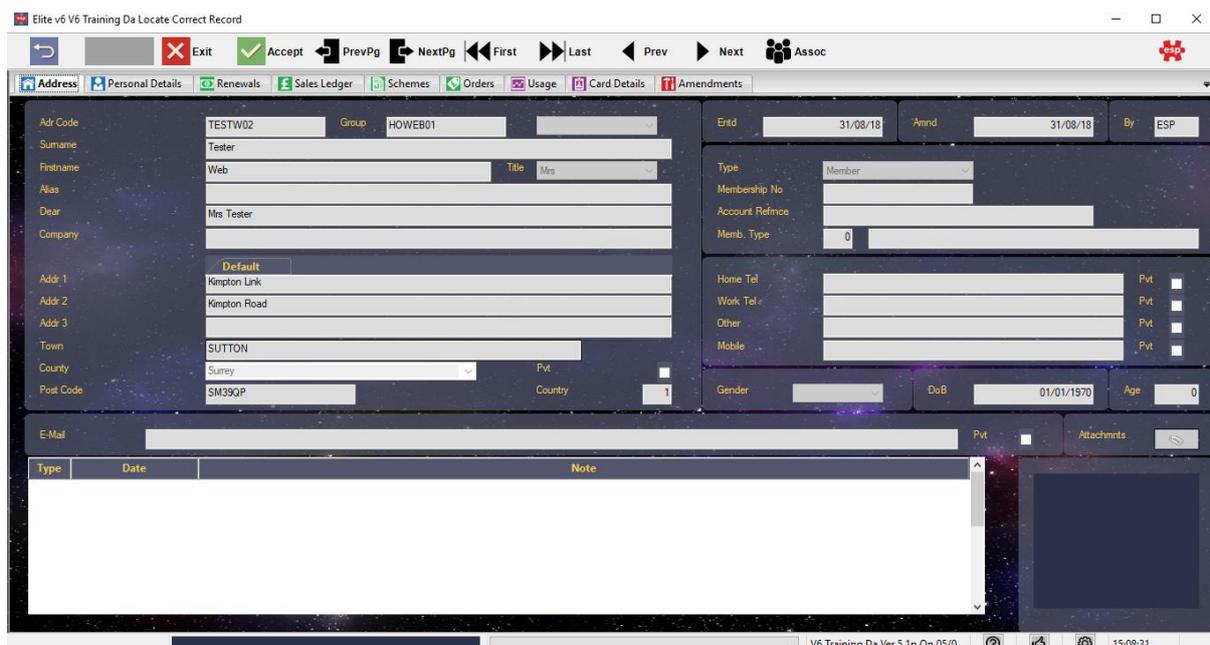
### Individual Statements



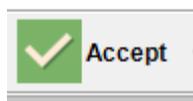
Select – **Customer Routines.**



Select – **Customer File**.



Select the **Customer Record** you wish to print a statement for.



Select – **F3 Accept**.



Select – **F8 Print**.



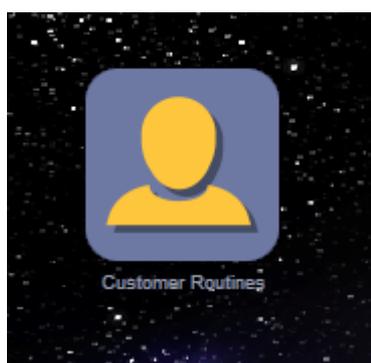
Select **Print Statement**, and you will see the following options.



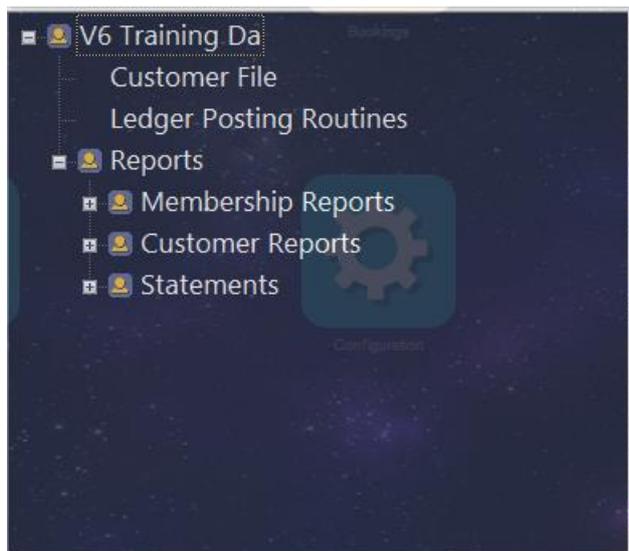
Select the Statement Option you wish to print.

## Multiple Statements

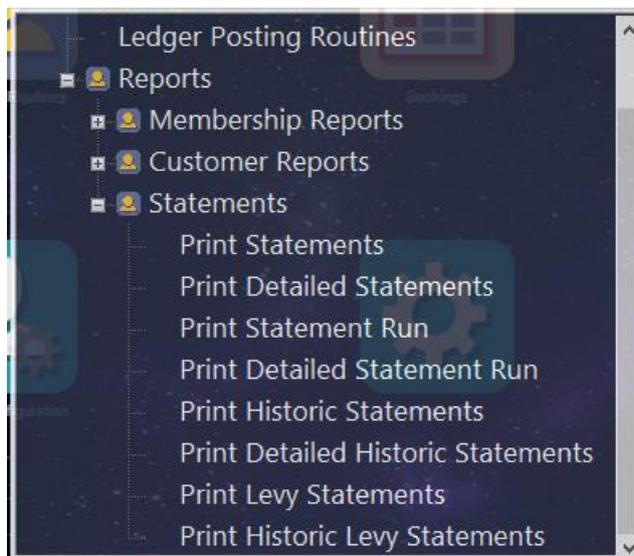
Statements can be printed at any time for all records or for a selection. The following section shows you how to print statements for All or a Selection of records.



Select – **Customer Routines**



Select – **Reports – Statements.**



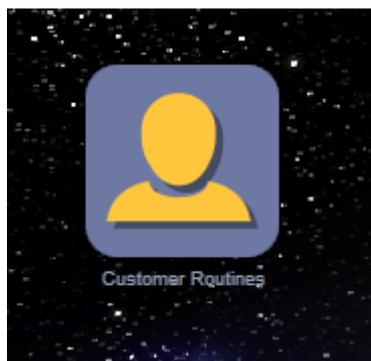
By selecting the **Statements** option, you will be given the option to choose specific Statements required or choose all. You may then choose to Print, Preview or Email the Statement(s)

#### Statement Run

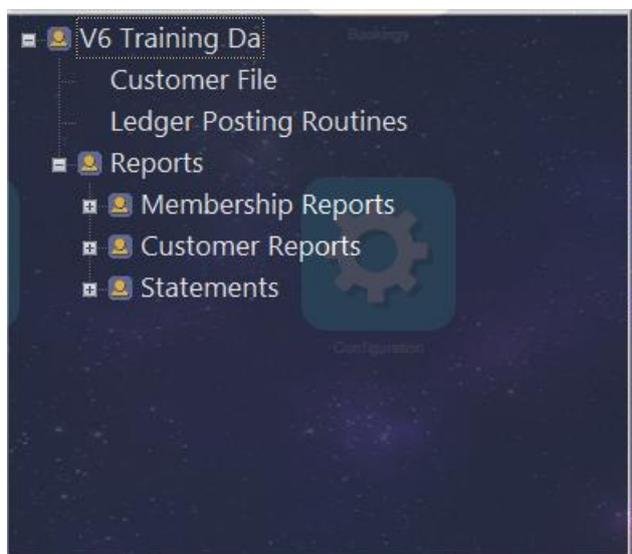
Statement Run will produce the same document as a standard Statement. However, once the 'Run' is complete, the information will not be displayed on future statements. The Run process will clear down old information and only outstanding balances will be shown.

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

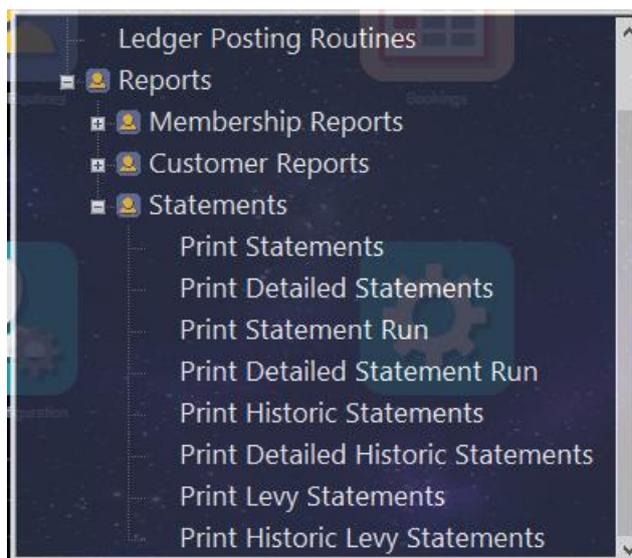
To complete a Statement Run:



Select – **Customer Routines.**



Select – **Reports – Statements.**



Select – **Print Statement Run.**



The option to do a complete run or for selected records will appear. The statement run will now produce a statement for each record selected. The next time a statement is printed, only the balance will be carried over from this period. At the next New Month Routine, the items which are printed in the statement run will be cleared from the Sales Ledger page as long as they have been fully paid.