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## **Membership User Guide**

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## MEMBERSHIP

The Membership section of Member ST is the most widely accessed. Carefully review permissions assigned to each user to limit access to Membership's high security tools.

Click the **Membership** link on the left hand navigation bar to display available options.

### Log On

- Open an internet browser and enter [www.memberst.com](http://www.memberst.com).
- Enter the user name and password assigned by your Administrator. (*Note: Administrators may modify user passwords at any time.*)
- **Log On** and **Log Off** of Member ST before and after each use. This creates an accurate audit trail of all transactions.

A password hint can be created in the Update User Info option under System Options. Click the **Forgot Password** option to access the password hint.

Member ST will periodically prompt users to select a branch before proceeding.

This is required according to the computer's Internet browser settings. (*Browser Toolbar: Tools > Internet Options, Delete Cookies, Delete History*)

The branch chosen should be the user's physical location.

Users may receive this prompt during a member check-in or before accepting payments. This confirms Member ST settings and directs all transactions to the chosen branch.

⚡ Throughout this guide, users will find highlighted text blocks, like this one, which contain helpful hints.

## MEMBERSHIP

### Check In

Member ST automatically defaults to the check-in screen.

- Click the **Check In** link in the Membership section of the left hand navigation bar to check in a member.
- **Scan** the Membership Card or select **More Options** if the membership card is not present to check in the member by name or member ID.

### CHECK IN SCREEN

The member check-in screen appears when a visitor checks in. One of the following four messages can be heard upon check in. Members with an outstanding balance or an alert will hear “There is a message for you” . Members who have terminated or are not allowed access to the facility will hear “Authorization Denied.” Members in good standing with no alerts will hear “Welcome.” And, on their birthday, members will be welcomed and hear the “Happy Birthday” tune.

All members of the unit are listed at the bottom of the screen.

- Click **Reverse Check In** to cancel the check in.
- This removes the entry from the usage report.
- If there are multiple members on the unit, click the  checkbox to quickly check in another member of the unit.
- Click the **Member ID** for a direct link to the Unit Information screen.
- Click the fist full of dollars icon to pay down the members balance.
- Click **Update Photo** to quickly capture the member's photo.

Member ID	Member Name	Gender	D.O.B.	Status	Check In
545001-00	Graham, Jan	M	10/1/66	Active	<input checked="" type="checkbox"/>
545301-00	Graham, Jane	F	12/1/62	Active	<input checked="" type="checkbox"/>

- 💡 Add alerts to welcome new members to the facility, inform members of lost and found items, collect required information, or remind members to register.
- 💡 Visits are recorded on the main Member ST Facility Usage Log (*Tools > Browse Reports > Membership*) and on the member unit Usage Log listed under History.

## Search

Users must search the Member ST database before creating a new unit or adding a member.

The **Search** and **Advanced Search** links allow users to quickly locate existing members.

## SEARCH

- Click the **Search** link.
- Enter the name of the person you are looking for using the last name, first name format. Use the % key as a wildcard when searching in Member ST.
- Click **More Options** to search by member ID, home phone, or date of birth.

Perform a search for a visitor interested in joining the association. Use the existing record if the visitor is already in the Member ST database. Do not create a new unit for an existing member record.

## ADVANCED SEARCH

- Click the **Advanced Search** link.
- Select the search filters (name, phone, home branch, etc.)
- If a filter has drop down options, select the filter then select an item from the drop down list. (Ex. For a list of male members, select the Gender filter, then choose 'male' from the drop down list.)

The screenshot displays the 'Advanced Search' form with the following settings:

- Name:** Smith
- Home Phone:** (empty)
- Primary Member:** (unchecked)
- Gender:** Male
- Members:** (checked)
- Y/NCA Employee:** (unchecked)
- Campaign Volunteer:** (unchecked)
- Donor:** (unchecked)
- Is your home owned?:** (unchecked)
- Regular:** (unchecked)
- Yearly Member:** (unchecked)
- Campaign Prospect:** (unchecked)
- Volunteer:** (unchecked)
- Active:** (checked)
- Home Branch:** 121 Mount Trashmore Family YMCA
- Join Date:** 01/01/1950 to 12/31/1950

**Advanced Search** can also be used to create reports or mailing lists for a specific group of members.

- Click **Refine Search** to return to the Advanced Search wizard with previous search options saved.
- Click **New Search** to begin a new search.

## MEMBERSHIP

- Click **Export Results** to send search results to a Microsoft Excel worksheet.

### Adding Members

The Add Unit process requires four steps. The steps are listed at the top of the Member ST screen and will be highlighted while working in that area.

#### STEP 1: MEMBERSHIP TYPE SELECTION

- Select the new member's home **branch** from the drop down list (if applicable). Click the down arrow to view all available branches. Users whose permissions apply to all branches may add new members for any branch; other wise, they can only add members to the branch where they are working.
- Select the appropriate **Membership Type** for the new member.

Membership	Join Fee	Membership Fee	Select
Family	\$75.00	\$67.00 /month	⌵
Family Corporate	\$75.00	\$67.00 /month	⌵
Family Scholarship	\$75.00	\$67.00 /month	⌵
Individual	\$50.00	\$47.00 /month	⌵
Individual Corporate	\$50.00	\$47.00 /month	⌵
Individual Scholarship	\$50.00	\$47.00 /month	⌵
Participant	None	None	⌵

#### STEP 2: SETUP MEMBERS

Enter the requested information for the primary member. The primary member is the responsible party for the new membership unit.

- **Required information** fields are noted by an asterisk. Users may not proceed until all required information is entered. The information collected for members will differ for each association.
- Enter all **contact information** collected from the new member. Advance through the application using the tab key.

💡 Enter a parent or guardian's information first for all youth memberships. This ensures that an adult is the primary contact. Return to the primary member's details later to change their status to inactive. If the primary member has already been entered and a child is being added, the Address and Emergency Contact fields will pre-fill with the primary member's information, but can be changed.

## MEMBERSHIP

The **Recognition** section allows users to specify the member's affiliation with the organization. The available options will differ for each association.

- Click the drop down arrow and select **Yes** to apply recognitions.
- Icons appear during check in based on the recognitions selected.
- Enter **Medical** or **Marketing** information as requested by the association.
- Click **Submit** after entering ALL information for the primary member. Member ST will scan the database to determine if the primary member is a **duplicate** of an existing member.


## DUPLICATE MEMBER CHECK

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Member ST performs a **Duplicate Member Check** after users submit information for the primary member.

Possible duplicates will display.

The primary member's information fields are checked against all other adult records. The number of matching fields determines the **Match Percentage**.

- Click the  icon to access the existing unit's information screen. Review to determine if this is the same member.



New Member Information					
Member Name	Home Address	Phone Number	Email	Date of Birth	Gender
Wetzel, Gilly	203 Lake Shore Drive Sandywell, AL 35209	(305) 427-1400		09/21/1961	F

Possible Duplicate Members for this Member						
Match Pct.	Member Name Member ID	Home Address	Phone Number	Email	Date of Birth	Gender
60.0%	<b>Wetzel, Gilly</b> 100114-01	22 Woodside Drive Mable, GA 30096	(706) 224-7622		09/21/1961	F

- Click **Continue Adding Member** if the suggested duplicate is not a match.
- Additional adult or child member(s) may be added by clicking the appropriate link. The child information fields differ from the adult fields. *Choose carefully!*
- Enter all members of the unit. Click **Finished Adding Members** at the bottom of the screen to proceed to Dues, Fees, and Discount Groups.


## MEMBERSHIP

### STEP 3: DUES, FEES, AND DISCOUNT GROUPS

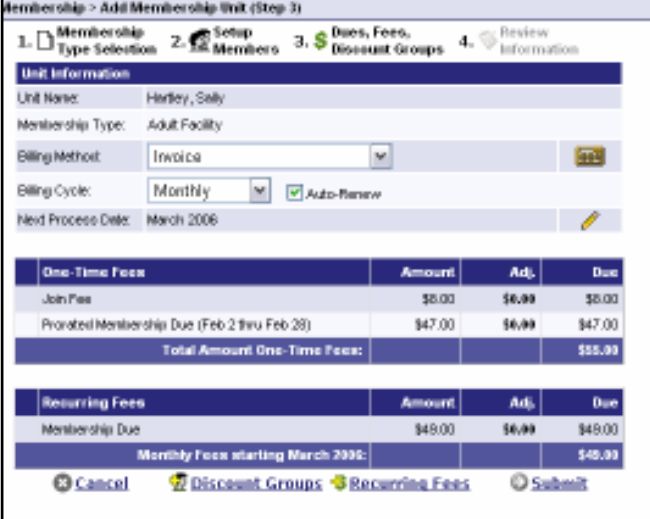
Enter a member's billing method, frequency, and drafting account in Step 3. The following six steps explain how to properly set a member up for draft.

1. Invoice appears in the **Billing Method** drop down box until a bank or credit card account is added.

Members who wish to pay annually or up front should be set to invoice.

For members that choose to pay by bank or credit card draft, click the  calculator icon to add the new account.

- Add Credit Card: Enter the requested information for the cardholder. Select card type, then enter the card number and expiration date. Click Submit.
- Add EFT: Enter the name on the bank account, routing number, and account number. Be sure to specify Checking or Savings. Click Submit.



One-Time Fees	Amount	Adj.	Due
Join Fee	\$0.00	\$0.00	\$0.00
Pro-rated Membership Due (Feb 2 thru Feb 28)	\$47.00	\$0.00	\$47.00
<b>Total Amount One-Time Fees:</b>			<b>\$55.99</b>

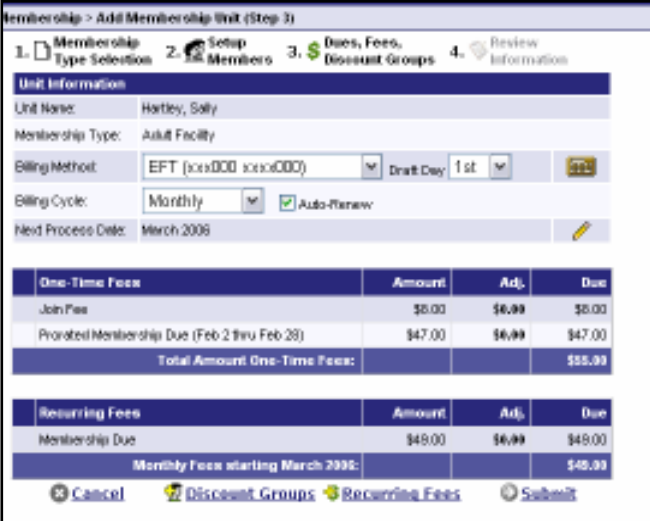
  

Recurring Fees	Amount	Adj.	Due
Membership Due	\$48.00	\$0.00	\$48.00
<b>Monthly Fees starting March 2006:</b>			<b>\$48.00</b>

Once a drafting method is entered, a draft date option will appear.

2. The **Draft Day** field opens after entering the member's billing account.


- Select the draft day the member prefers. *(Note: Draft day options will vary for each association.)*



One-Time Fees	Amount	Adj.	Due
Join Fee	\$0.00	\$0.00	\$0.00
Pro-rated Membership Due (Feb 2 thru Feb 28)	\$47.00	\$0.00	\$47.00
<b>Total Amount One-Time Fees:</b>			<b>\$55.99</b>

Recurring Fees	Amount	Adj.	Due
Membership Due	\$48.00	\$0.00	\$48.00
<b>Monthly Fees starting March 2006:</b>			<b>\$48.00</b>

 The Scan Check/Credit Card option at the bottom of the screen appears as users are setting up a billing account. It will read the check or credit card. This can save a great deal of time and prevent numerous data entry errors. Contact DAXKO's Support Services Team for a list of hardware recommendations.

## MEMBERSHIP

3. Select the member's **Billing Cycle** from the drop down menu. The chosen Draft Day and Billing Cycle determine the prorated membership amount that the member must pay.

The options may be monthly, quarterly, semi-annual or annual, but will vary for each association.

Each association will draft monthly memberships based on one of the following:

- Month-to-Month based drafts pay membership dues for the period from the first day of the month to the last day of the month. The prorated amount is a daily membership charge for each day from the current day through the last day of the month.
- Date-to-Date based drafts pay membership dues for the period from the draft day of the current month to the draft day of the following month. The prorated amount is a daily membership charge from the current day through the next draft date.
- For quarterly, semi-annual and annual memberships, the member will pay a prorated amount for the remainder of the current billing period. The quarterly, semi-annual or annual payment amount will batch on the first day of the next month.


**Example:** Mr. Moody starts an annual membership on February 20th. Today, Mr. Moody will pay a \$15 prorated membership fee. He will owe \$550 for the full year on March 1st. This will pay membership dues from 03/01/2006 – 02/28/2007.

4. **Auto-Renew** determines the status of the unit at the end of each billing cycle. Remove the check mark from the box if the membership should terminate at the end of billing cycle. Once the check is removed, Member ST will set a Termination Date in place of a Next Process Date.

5. If necessary, use the pencil icon to change the **Next Process Date**.

- Allow a member to pre-pay future membership dues by moving the **Next Process** date forward. Membership dues will be added for each month that the next process date is moved forward.

## MEMBERSHIP

- Click the pencil icon, choose the future month from the drop down list, and click the  check mark to save the changes.

**One-Time Fees** consist of the join fee and prorated membership dues for the new member.

- Adjust off a portion or all of the one-time fees by selecting **\$0.00** in column next to the specific item. *(Note: See the System Options User Guide for instructions on setting up adjustments.)*

One-Time Fees	Amount	Adj.	Due
Join Fee	\$8.00	\$6.99	\$8.00
Prorated Membership Due (Feb 2 thru Feb 29)	\$47.00	\$6.99	\$47.00
Total Amount One-Time Fees:			\$55.99

Recurring Fees	Amount	Adj.	Due
Membership Due	\$49.00	\$6.99	\$49.00
Monthly Fees starting March 2016:			\$49.99

**Recurring Fees** reflect the amount the member will be drafted, based on their selected billing cycle. Recurring Fees include any amounts that will come due in the next billing cycle.

- Attach an additional recurring fee, such as monthly locker rental or towel service, by selecting **Recurring Fees**. Select your item and verify/enter the fee dollar amount. Click **Add Fees**. The user is returned to the Membership Dues Setup screen. All added fees will appear. *(Note: Member ST will prorate for the amount of the recurring fee once it has been added.)*

**Discount Groups** consist of Discount or Subsidy Groups (Ex. Membership financial assistance or ABC Company payroll deduction). Membership dues and join fees can be discounted through Discount Groups.

- Place a member in a discount group by selecting **Discount Group**, then selecting the appropriate group. Member ST will reflect the discount for both the one-time fee and recurring fees.
- Auto-terminate members cannot be added to Discount Groups. Use the line item discount tool on the account balance screen to apply one-time adjustments for these members.

Additional discounts/adjustments and one-time fees may be added later on the Account Balance Screen.

- After reviewing the dues, fees and discount setup, click **Submit** to advance to Step 4 in the add unit process.

- 💡 If you need to put an annual member into a discount group, leave auto-renew checked and proceed as normal. Once you have fully submitted the information, you can set a termination date from the unit information screen.
- 💡 Remember: Discount group means that the YMCA eats the cost and subsidy means that a third party sends payment to the YMCA.

## MEMBERSHIP

### STEP 4: REVIEW INFORMATION

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The review screen displays all key information regarding the unit. Carefully review all the information.

- Click the 1, 2 or 3 link to return to a section and edit information.
- Click **Submit** after verifying all information.
- A confirmation box will appear after clicking Submit. This is the user's final opportunity to approve or cancel the new unit.
- Click **OK** to create the new membership unit or **Cancel** to delete the new membership.



Once clicking OK, the new unit will be created. The user is directed to the new unit's information screen.

Click the  fist of dollars to access the Account Balance screen and accept the member's payment.

### ADDING NON-MEMBERS / PARTICIPANTS

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Non-members can also be added to Member ST. Non-members are commonly called Participants, Guest Participants or Community Participants. Privileges given to non-members vary across associations. Refer to your specific association's policies for guidelines regarding non-members and participants.

Users should create a new participant unit when a visitor makes a pledge, participates in a program, or is a guest.


- Click **Add Unit** in the navigation bar.
- Select the Home branch and Non-Member Type (Participant, Non-Member, etc.)
- Follow steps 1, 2 and 4 of the **Add Unit** process.
- Non-members receive an inactive status. Membership dues will not be generated in Step 3.


- 💡 Do not click the 'Back' button on your Internet browser to update any information.
- 💡 Enter the parent or guardian before entering a child participant.

## MEMBERSHIP


### Update Information

The unit information screen allows users to update information for individual members.

From the **Member Information Block**, click the  member details icon to access the member's contact information, create notes, alerts or take a member photo.

- Click the  **Member Details** icon to update member information, such as home address, telephone number, and email address, add recognitions, marketing, or medical information for a particular member of the unit.

### ASSIGN MEMBERSHIP CARD

- Click the  **Member Details** icon to update the barcode for a member. Member ST assigns a barcode to each member by default. However, if the association is using pre-printed membership cards, then users will need to update the barcode to match that of the card.
- Highlight the numbers listed in **Barcode** field. Users may then either scan the new card or enter the numbers manually. If entering manually, remember to select **Update** after entering the new number.

### MEMBER PHOTO

Search for the member and click the  **Member Details** icon at the bottom of the unit information screen.

- Click the **Member Photo** link on the left-hand navigation menu.
- Click **Scan** to activate the camera.
- Position the member in the viewfinder and click **Capture**.
- Click **Save Image** to upload the photo to Member ST.
- Click **Release** to delete the photo and take a new one.



After loading the picture, click **Print Now** to print the new membership card. Click **Print Later** to send the card to a batch. Print an entire card batch in Tools (Membership Cards link).

## MEMBERSHIP

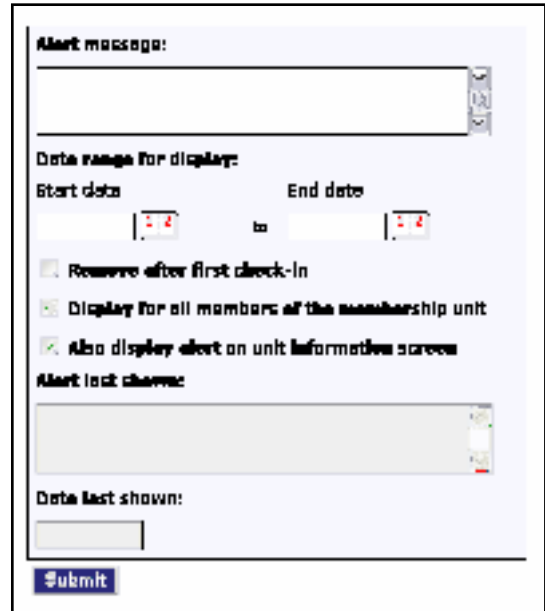
### ALERT MEMBER

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Use the **Alert Member** link to create a check in message for a unit or an individual member.

- Enter the message in the **Alert Message** field.
- Enter the **Date Range for Display**.
- Choose to remove the alert after the member's first check-in.
- Choose to display the alert for the selected member or for all members in the unit.
- Choose to display on the members unit information screen.


Alerts are posted in Unit History under the Notes tab. It lists the user name and time the alert was posted.



### MEMBER NOTES

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Click the **Member Notes** link to store special information about a member. Notes are internal and for staff viewing only.

- Select **Add Note** to enter a note about a member.
- Choose the **Note Type** from the drop down menu.
- Enter the message and click **Submit**.
- Edit notes by clicking the  pencil icon.



Unit	User	Description	Edit
7155000	Initialzic	Entry is initialized in membership records table/condn	


Notes are posted in Unit History under the Notes tab. It lists the user name and time the note was added.

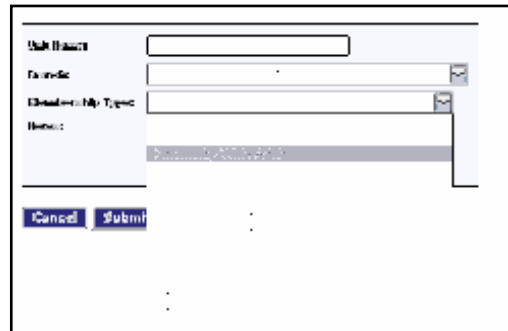
- 💡 Use DAXReport to create a custom report for viewing member notes and alerts.
- 💡 Clicking the Member Details icon expands the left navigation menu to View/Update Alerts, Notes, and Photo Options.
- 💡 All required fields must be entered to update a member's information.

## MEMBERSHIP

### TOOLBAR ITEMS

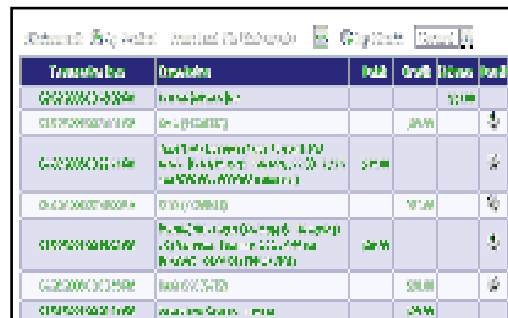
The toolbar is located at the top of the unit information screen.

Click the  pencil icon on the unit information screen to change the unit name, branch, or membership type.



**Journal** stores a record of all financial transactions for the unit. The journal will automatically display information from the last six statements. View older transactions by clicking on the drop down menu. Users may choose to either view **by period** or **by month**.

- Click the **detail icon** next to a fee item to cancel the transaction or refund the payment. Only users with the **Create Refund** permission can create refunds.
- Refunds methods other than System Credits must be approved in the Finance section of Member ST. Refer to the Finance User Guide for details.
- Click the detail icon next to a payment to view or print an old receipt.




Transaction	Description	Date	Credit	Debit	Detail
000000000000	Membership Fee			1000	
000000000000	000000000000		1000		
000000000000	Unit Information Fee			1000	
000000000000	000000000000		1000		
000000000000	000000000000		1000		
000000000000	000000000000		1000		
000000000000	000000000000		1000		

**Billing** stores an unlimited number of EFT and Credit Card accounts for the unit.

- Click the pencil icon to edit the account number or expiration date.
- Click the **Add EFT** or **Add Credit Card** link to add a new account. Enter the requested information then click **Submit**.



Account	Update On Account	EFT	Delete
			

Users will not be able to delete a billing method if it is currently tied to a pending payment, like membership dues. Users can delete any other billing methods stored in the unit, by clicking the  trash can icon in the delete column.

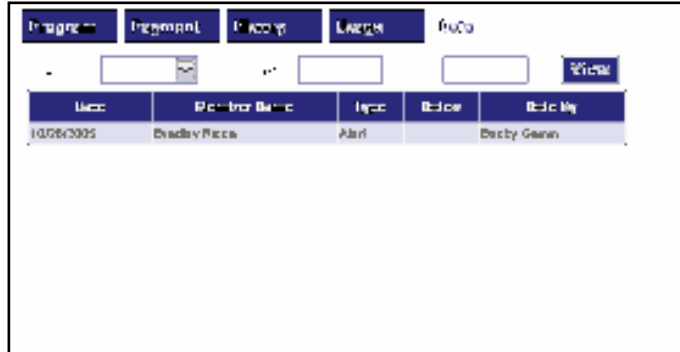
- Do not use the Edit link to renew a terminated member. This will not generate membership dues.
- Billing accounts may not be updated or removed if the account is listed as the payment method for upcoming membership dues, program, or fundraising payments. Attach a new account to the payment in order to delete the billing method.

## MEMBERSHIP

**Programs** advances the user to program registration. Refer to the Programs User Guide for details.

**History** consists of five tabs of information:

- **Programs** details all program registration history.
- **Payment** lists all payment types made by the unit.
- **History** reflects membership type and status changes.
- **Usage** displays facility usage of each unit member by date.
- **Note** stores and lists all notes and alerts placed on the unit, plus the user name who originally added the note or alert.



Date	Member Name	Type	Role	Member ID
10/26/2005	Dudley Pica	Adult		Betsy Gann

**Donations** allows users to create new pledges for the unit or view detailed information for an existing pledge. Refer to the Fundraising User Guide for details.

**Cards** displays all membership cards for the unit.

**Membership Termination and Hold** allows memberships to be placed on hold on or terminated

From the Unit Information screen click the Status edit pencil

Choose the Termination or Hold reason from the drop down list

If **Terminating** the membership choose the termination date



Unit Name: Graham, Amy  
Branch: Waldo Y  
Membership Type: Single Parent Family  
Action:  Terminate  Hold  
Reason for Termination: No longer using facility  
Membership End Date: 6/5/2006  
Description:

Cancel Submit

If placing the membership on **Hold** choose the start and end date

Choose to hold the membership with or without dues


Click Submit to save the changes




Unit Name: Graham, Amy  
Branch: Waldo Y  
Membership Type: Single Parent Family  
Action:  Terminate  Hold  
Reason for Hold: Medical  
Start Date: 6/5/2006  
End Date: [ ] [ ] [ ] [ ]  
 Hold Membership Without Dues until August 2006  
 Hold Membership With Dues

## Managing Payments

### ACCOUNT BALANCE: ACCEPT A PAYMENT

To access the Account Balance screen, click the  fist full of dollars icon. The Account Balance screen displays the member's Balance Due, Total Balance, and allows users to add one-time fees and enter adjustments.

- Click **Add One-Time Fees** to apply a single fee. The available adjustments are based on the member's home branch. (Ex: Lost card fee or merchandise sales)
- Click **Membership Dues** to edit the membership payment options and billing preferences.
- Click the **\$0.00** in the **Paid/Discount** column to apply any adjustment to a line item. The available adjustments are based on the member's home branch.



Unit Information

Unit Name: Ricca, Bradley (Unit ID: 104030202)  
 Branch: Downtown Family YMCA  
 Membership Type: Community-Wide Adult  
 Balance Due: \$17.00  
 Total Balance: \$17.00  
 Credits: Refund: \$0.00  
 System Credit: \$0.00  
 Extra Payment: \$0.00

[Add One-Time Fees](#) [Apply Discount](#) [Apply Third Party Subsidy](#) [Membership Dues](#)

Membership Unit: Ricca, Bradley (Unit ID: 104030202) Check All - Clear All

Charged Date	Description	Fee Amount	Paid	Selected	Unchecked Balance	Due Date	Minimum Payment	Payment Amount	Select
01/25/06 03/01 jan	Join Fee	\$0.00	\$6.99	\$6.99	\$0.00	01/25/06	\$0.00	\$ 0.00	<input checked="" type="checkbox"/>
01/25/06 03/01 jan	Prorated Membership Due (.Jan 25 thru Jan 31)	\$0.00	\$6.99	\$6.99	\$0.00	01/25/06	\$0.00	\$ 0.00	<input checked="" type="checkbox"/>
Unit Total:		\$17.99	\$6.99	\$6.99	\$17.99		\$17.99	\$17.99	
Grand Total:		\$17.99	\$6.99	\$6.99	\$17.99		\$17.99	\$17.99	

[Cancel](#) [Schedule Payments](#) [Make Payment](#)

- Click **Make Payment** to pay charges. Payment method options will vary by association. EFT and credit card accounts already recorded in Billing will appear in the drop down menu. Select the preferred method, and enter the required information. (*Note: See Payment Methods for additional information.*)
- Click the **Printer Friendly Version** to print the receipt.

- 💡 Click Cancel to return to the Unit Information screen. The balance due will then be listed as an Aged Receivable.
- 💡 Reverse a payment in the Finance section of Member ST.

## MEMBERSHIP

### PAYMENT METHODS

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**Cash:** Enter the cash payment amount.

**Check:** Enter the payment amount and check number.

**Credit Card (one time use only):** Select the desired credit card from the drop down menu. Enter the cardholder's name, card number, and expiration date. The credit card transaction will be approved in real time and will not appear in the user's shift close-out.

**EFT (one time use only):** Enter the bank routing and account number. The EFT transaction will be approved in real time and will not appear in the user's shift close-out.

**Swipe Terminal:** Swipe credit cards are processed through an external credit card terminal. Record the authorization code and enter here.

For Notes, enter information that might be necessary for collection, such as a driver's license number or split payments.



The screenshot shows a web-based form titled "Payment Method". At the top, there are icons for EFT, MasterCard, VISA, American Express, and a stack of cash. Below these icons, the "Payment Amount:" field contains "\$ 17.00". The "Payment Method:" field is a dropdown menu currently displaying "-- Select Payment Method --". The dropdown list is open, showing the following options: "-- Select Payment Method --", "VISA (xxxx63489)", "New Credit Card (one-time use)", "New EFT Bank Draft (one-time use)", "Check", and "Cash". At the bottom of the form, there are "Cancel" and "Submit" buttons.

## MEMBERSHIP

### ACCEPT MORE / LESS THAN BALANCE DUE

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Member ST allows users to accept more or less than the member's balance due. Policies are handled by the association.

Accept LESS than the balance due:

- Change the dollar amount in the **Payment Amount** column. Update the balance by clicking outside the box in the white area.



- Click **Make Payment** to advance to the Make Payment screen. Process payment for the amount entered.

To accept MORE than the balance due:

- Click **Make Payment** to advance from the Account Balance screen to the Make Payment screen.
- The desired **payment amount** is displayed. Override the desired payment amount by entering the new amount in the Payment Amount box. (note this only works when making an overpayment, under payments MUST be reflected on the previous screen.)
- Select the **payment method**, enter the required information and submit the payment.

The screenshot shows the "Make Payment" screen. It is divided into two main sections: "Membership Unit Information" and "Payment Method".

**Membership Unit Information:**

- Unit Name: Pizza, Bradley
- Membership Type: Community/Adult
- Branch: Downtown Family YWCA
- Payment Amount: \$200.00

**Payment Method:**

- Payment Amount: \$ 300.00
- Payment Method: Cash
- Notes: Over payment


At the bottom of the screen, there are "Cancel" and "Submit" buttons.

## MEMBERSHIP

### SCHEDULE PAYMENTS

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- To schedule a fee to draft, click on the **\$0.00** in the **Sched.** column of the **account balance** screen for the item you wish to schedule.
- Select **Add A Scheduled Payment**.
- Select your payment method, the date for the draft, and the draft amount.


Delete the scheduled payment using the  trash can icon.

Unit Name:	Ricos, Bradley
Unit ID:	104030202
Charged Date:	2/2/2006
Fee Description:	Facility Rental
Fee Amount:	\$200.00
Paid Discount:	\$0.00
Total Balance:	\$200.00
Due Date:	02/02/2006



  

**Schedule New Payment**

Payment Method:  

Scheduled Date:  

Payment Amount: \$

 **Submit**  **Cancel**

### FAST FEES

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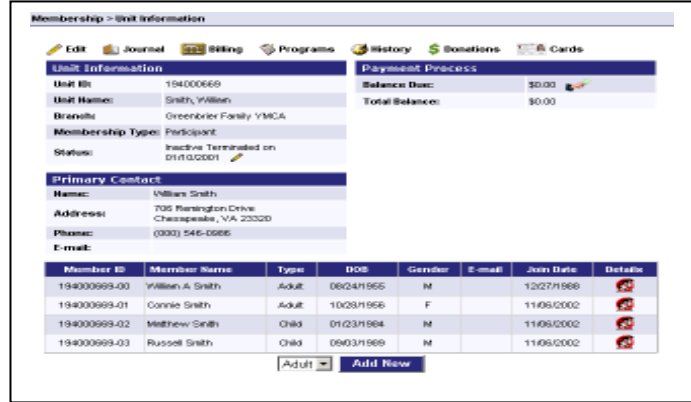
Fast Fees give users the ability to accept quick payments for front desk purchases such as bottled water, power bars, etc. Fast Fees do not track purchases on the member level and are only recommended for items that do not need to be associated with a unit record.

- Click **Fast Fee** on the left hand navigation bar. Put a check in the box for the appropriate items and fill in the amount (if necessary). Click **Add Fees** and take the payment to complete the transaction.
- Fast fees should be used for inexpensive items that are typically paid for with cash or a credit card. *(Note: The items sold are not tracked by a buyer.)*

Refer to the System Options User Guide for instructions on enabling a fee as fast fee.

**Renewing Terminated Members**

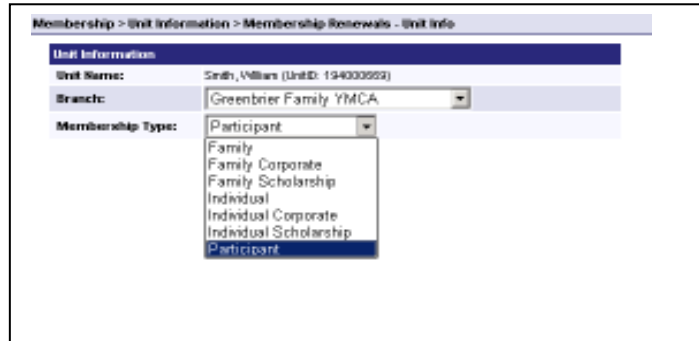
- **Search** for the terminated unit by member name.
- Click the edit pencil next to the **Status** icon to begin the renewal.



The unit name and ID will stay the same. The former branch will default, but may be changed.

- Select the renewing member's home **branch** and new **membership type**.

Users are automatically advanced to Renewal Billing Set-Up after making selections.

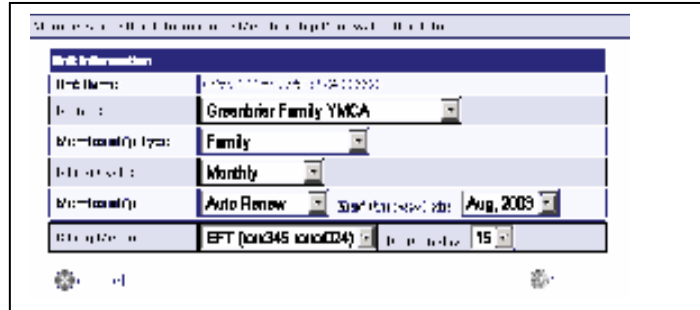


- 💡 Do not use the Edit Link to renew a terminated member. This will not generate membership dues.
- 💡 Billing Accounts cannot be updated or removed if the account is listed as the payment method for upcoming membership dues, program, or fundraising payments.

## MEMBERSHIP

The unit's original billing cycle, billing account, and draft date will appear on the Unit Info Renewal screen.

- Select the drop down box for any field to update information.
- Click **Submit** when all changes are made.



The screenshot shows a web-based form titled "Unit Info Renewal". The form contains the following fields and values:

Unit Name:	Greenbrier Family YMCA		
Membership Type:	Family		
Billing Cycle:	Monthly		
Membership:	Auto Renew	Start Date:	Aug, 2009
Payment Method:	EFT (000345 0000004)	Draft Date:	15


At the bottom of the form, there are two icons: a gear icon on the left and a trash can icon on the right.

**Renewal Join Fees** and **Prorated Fees** are automatically applied. Follow association policy for charging and collecting renewal fees. Delete join fees and prorated fees using the trash can icon.

- Click **Recurring Items** to apply recurring fees or adjustments.
- Click **Discount Groups** to add the renewing member to a Discount or Subsidy group.
- Click **Submit** to continue.

A gray confirmation box appears after clicking Submit.

- Click **OK** to confirm or **Cancel** to make changes before submitting.

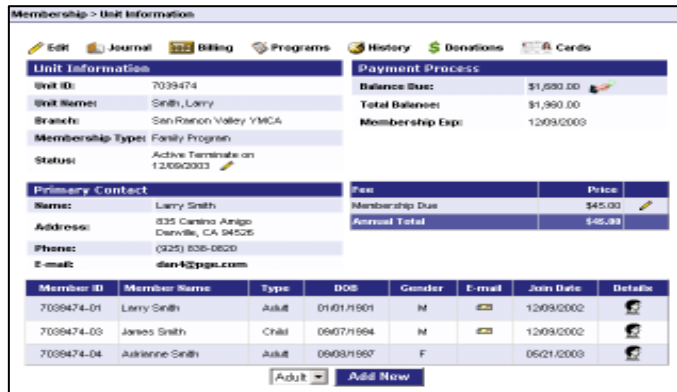
 Do not use the Toolbar Edit link to renew a terminated member. The Toolbar Edit link will not generate dues for the member.

**MEMBERSHIP**

**EARLY RENEWALS**

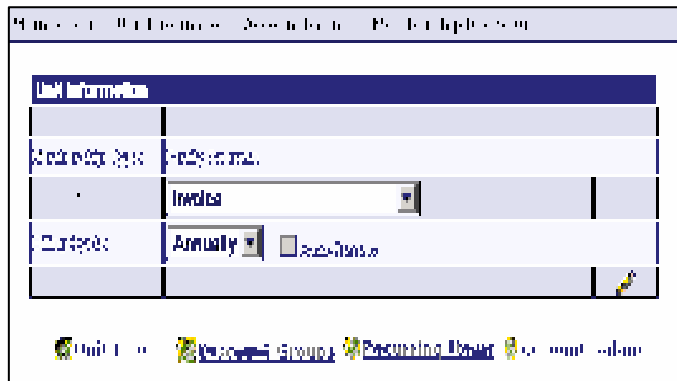
A member may choose to renew before his or her membership expires. This is especially common for semi-annual and annually invoiced members.

- **Search** for the unit set to terminate.
- Click the **Fee Block** edit icon to begin the early renewal.
- Click the Termination Date edit icon to move the Next Process Date forward.



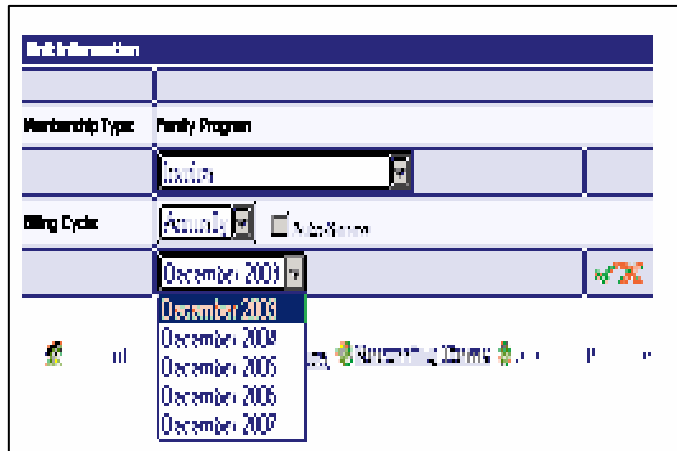
A gray confirmation box appears after clicking the icon. The user is warned that changing the next process date will add a fee for each recurring item.

- Click **OK** in the confirmation box to proceed.
- Select the new **Next Process Date** from the drop down list.
- Click the green arrow to save changes. The early renewal is now complete.



Membership dues are added to the member's account balance, allowing the user to accept payment.

The **Membership Expiration / Next Process Date** updates on the unit information screen.



## MEMBERSHIP

### EDITING NEXT PROCESS DATES

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System Administrators are able to edit Next Process Dates (NPD) in two places.

1. Use the edit icon in the **Payment Process** block to **reset** a member's next process date. This requires the high security permission (Reset Next Process Date). System Administrators should carefully manage high security permissions.
  - Use the Reset Next Process Date tool to move a next process date back to the current month. Users can then reschedule Pending Batch payments. Reset the NPD forward to give the member a complimentary month of membership.
  - **Resetting** the member's NPD does not add membership dues and does not affect the account balance.
2. Use the edit icon in the **Fee** block to advance the next process date and allow members to pre-pay membership dues. This requires the **Update Next Process Date** permission.
  - Use this tool to process early membership renewals.

## Track Prospective Members

Log tours and keep track of prospective members in Member ST.

Begin by clicking the **Prospects** link on the left hand navigation bar.

- Click **Add New** to add a new prospect.
- Enter the required information for the prospective member. (*Note: Information denoted with an asterisk indicates a required field.*)
- Click the **Contact** tab to record contacts and notes associated with the prospect.

Once the prospect's information has been submitted, users may click **Join** at the bottom of the screen to walk through the steps of adding this person as a member.

The screenshot shows the 'Prospects' form in Member ST. The form has a left-hand navigation bar with options like 'Prospects', 'Reports', 'Search', 'Administrative', 'Administrative', and 'Admin'. The main form area has a title bar with 'Prospects' and 'Contact'. Below the title bar, there are several input fields: 'Name', 'Email', 'Phone', and 'Address'. The 'Name' field is marked with an asterisk, indicating it is a required field. There are also 'Level Up' and 'Add New' buttons.

The screenshot shows the 'Contact' form in Member ST. The form has a title bar with 'Prospects' and 'Contact'. Below the title bar, there are several input fields: 'Last Contact', 'Next Contact', and a large text area for notes. The 'Last Contact' and 'Next Contact' fields are marked with asterisks, indicating they are required fields. There are also 'Level Up' and 'Add New' buttons.

- 💡 Be sure to search the prospect data base before adding a new unit in order to track conversion.
- 💡 Customize a report in DAXReport to track tour conversions.