

Membership Renewal Process

MiClub XClub 2+ (MiMembership)



Overview

This document outlines the process to create and print or email annual membership renewal invoices for customers using the MiClub membership database software MiClub XClub 2+ (MiMembership).

Additional information on processes, such as how to resign a member, can be found on the MiClub support website <https://help.miclub.com.au>

Club Sync – MiClub Website Integration

We recommend you STOP running this service before processing your annual membership renewal invoices. This will enable you to delete invoices if you make a mistake during the membership renewal process. Please contact MiClub Support for assistance.

Back Up

Before making changes to your database and processing your annual membership renewal invoices, ensure you have a current server back-up that includes your membership database.

Attribute Fields

Update any member attribute fields associated with fees or charges i.e. storage facilities (lockers) or add-on packages (range balls) before processing membership renewal invoices. This will ensure a member's individual default charges are updated during Step 2.

Step 1 – Update Charge Types and Membership Types

Charge and Membership Types

Update your Charge Type and Membership Type values (\$) for the new financial year.

1. Select Config icon from the Main Menu (left column)
2. Select Charge Type
3. Overtyping default Charge Type to new values (\$)
 - a. Ensure the default value for your Membership Fee or Subscription Charges are set to \$0
4. Select Membership Type
5. Overtyping default Membership Type amount to new values
6. Repeat this process for the Membership Discount feature

Membership Renewal Process

MiClub XClub 2+ (MiMembership)



MiMembership - [Configuration]

2.1.5

Members

Financials

Print

Mail

Reports

1

Config

Charge Type **2**

Account Credits

Payment Method

Membership Type

Membership Discount

Membership Status

Billing Period

Address Type

Telephone Type

Attributes

Notes Type

GST

Members List View

Invoice List View

Print List

Payment Plans

Mandatory Fields

Staff

Security

ClubSync Setup

Description	GST	Default	3	Link	Disc
Affiliation Fee	GST		\$80.00		
Asset Renewal Levy	GST		\$70.00		
Cart Storage - Electric	GST		\$346.00		
Cart Storage - Petrol	GST		\$285.00		
Club Storage - Clubs Only	GST		\$156.00		
Club Storage - Electric	GST		\$260.00		
Club Storage - Non Electric	GST		\$208.00		
Ladies Locker	GST		\$39.00		
Membership Fee	GST		\$0.00		
Mens Locker - Full	GST		\$52.00		
Mens Locker - Half	GST		\$39.00		
Merchant Fees	GST		\$0.00		
Private Cart Licence	GST		\$52.00		

[Configuration]

Charge Type	Membership Type	Charge Type	Amount	5	GST
Account Credits	Country	Membership Fee		\$336.00	
Payment Method	Country	Affiliation Fee		\$65.00	
Membership Type 4	Country	Asset Renewal Levy		\$70.00	
Membership Discount	Flexible	Membership Fee		\$378.00	
Membership Status	Flexible	Affiliation Fee		\$80.00	
Billing Period	Flexible	Asset Renewal Levy		\$70.00	

Membership Renewal Process

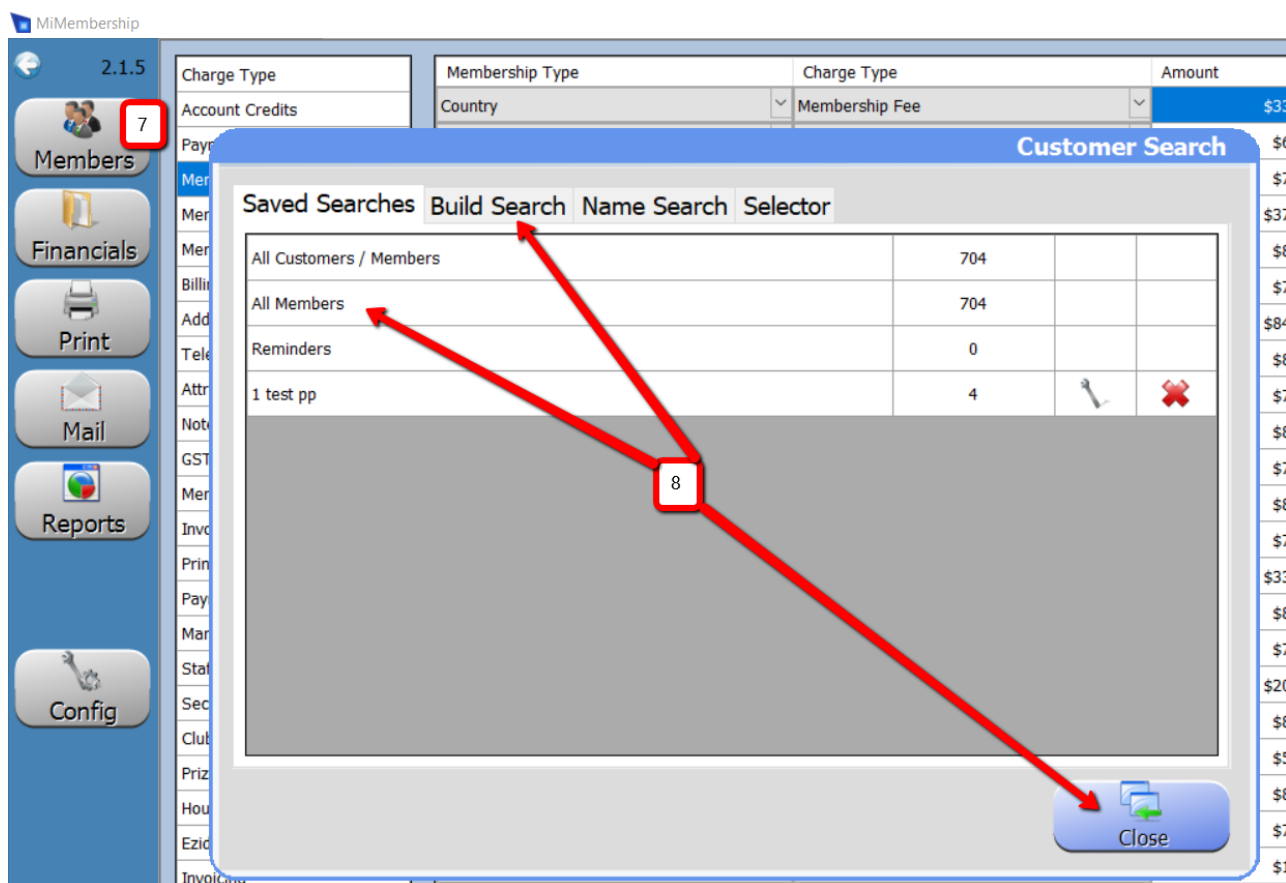
MiClub XClub 2+ (MiMembership)



Step 2 – Apply Default Membership Charges

Update all members' individual default charges to reflect any new rates applied in Step 1.

7. Select the Members icon from the Main Menu (left column)
8. From Search window, select Close, your Saved Search or Build Search
9. From the Members List View screen, click your mouse on the top left cell to select all members in your search results
10. Select Change icon (from menu located at bottom of screen)
11. The Global Change window will appear, select Default Charges from the drop menu list
12. Select OK
13. A second window will appear, select Replace ALL – this will apply the changes made to the charges in Step 1, Item 5 to all members in the highlighted list (Item 9). Select OK in the next window (to update and/or add charges to the members in your Search list)



Membership Renewal Process

MiClub XClub 2+ (MiMembership)



List View Details Membership Account POS Transactions Notes History

	Member No	Outstanding	Expiry	Renewal	DOJ	DOB	Membership Status	GolfLink
9		\$20.00	24/10/2020	25/10/2020	7/06/2012	16/06/1939	Active	
		\$0.00	30/09/2019	1/10/2019	9/06/2012	1/09/1952	Active	
	13	\$0.00	7/03/2020	8/03/2020	13/06/2012	3/11/1932	Active	
	14	\$0.00	30/09/2019	1/10/2019	13/06/2012	1/05/1952	Active	
	16	\$0.00	30/09/2019	1/10/2019	13/06/2012	18/03/1946	Active	

Global Change

Default Charges **11**

This will add the default charges for membership types to each member selected.

Close OK **12**

Do you want to replace all existing charges, replace only default charges or keep all existing charges?

13 Replace All

Defaults

Keep

Cancel

86	\$0.00	30/09/2019	1/10/2019	1/10/2017	16/01/1945	Active	
91	\$0.00	30/09/2019	1/10/2019	25/09/2012	19/04/1947	Active	
92	\$0.00	30/09/2019	1/10/2019	25/09/2012	19/06/1962	Active	
93	\$0.00	30/09/2019	1/10/2019	25/09/2012	20/01/1966	Active	
97	\$0.00	30/09/2019	1/10/2019	26/09/2012	5/09/1944	Active	
112	\$0.00	23/01/2020	24/01/2020	22/10/2012		Active	

New Delete Invoices Card **10** Change Search

1856 records

1/07/2018 30/06/2018 July to June Financial

This will update the charges for 4 members and add new charges to 700 members.

13 OK

Cancel

1/07/2018 30/06/2018 July to June Financial

Membership Renewal Process

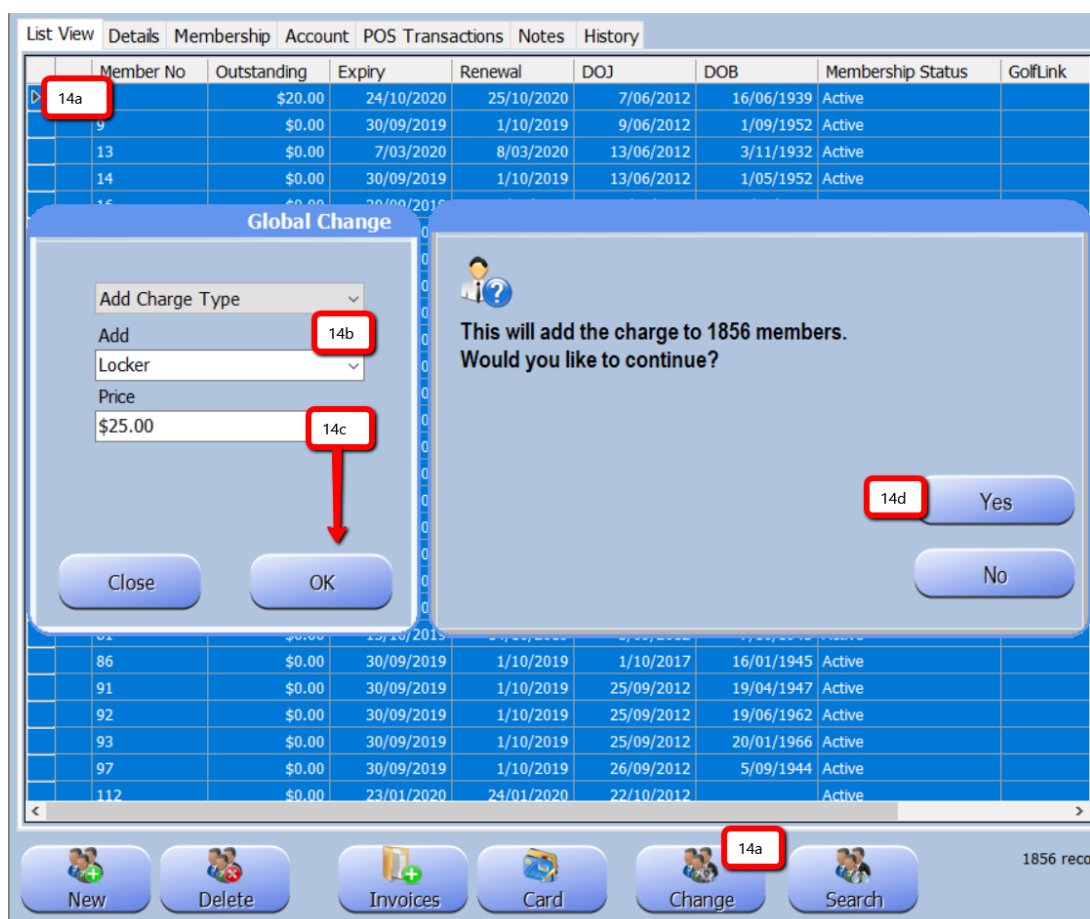
MiClub XClub 2+ (MiMembership)



14. To update Ad-hoc (or Attribute) Charge Types such as Locker Fees;

- Create a new search or select a saved search of members with the coinciding Attribute or Membership Status, then select all members in the List View and select the Change icon.
- The Global Change window will appear, select Add Charge Type and the Add Charge Item from the drop menus
- Enter the amount of the Charge, select OK
- A second window will appear, select Yes – this will apply the charge to the individual members listed membership default charges

Repeat Step 14 for each Ad-hoc (or Attribute) charge you invoice members



Membership Renewal Process

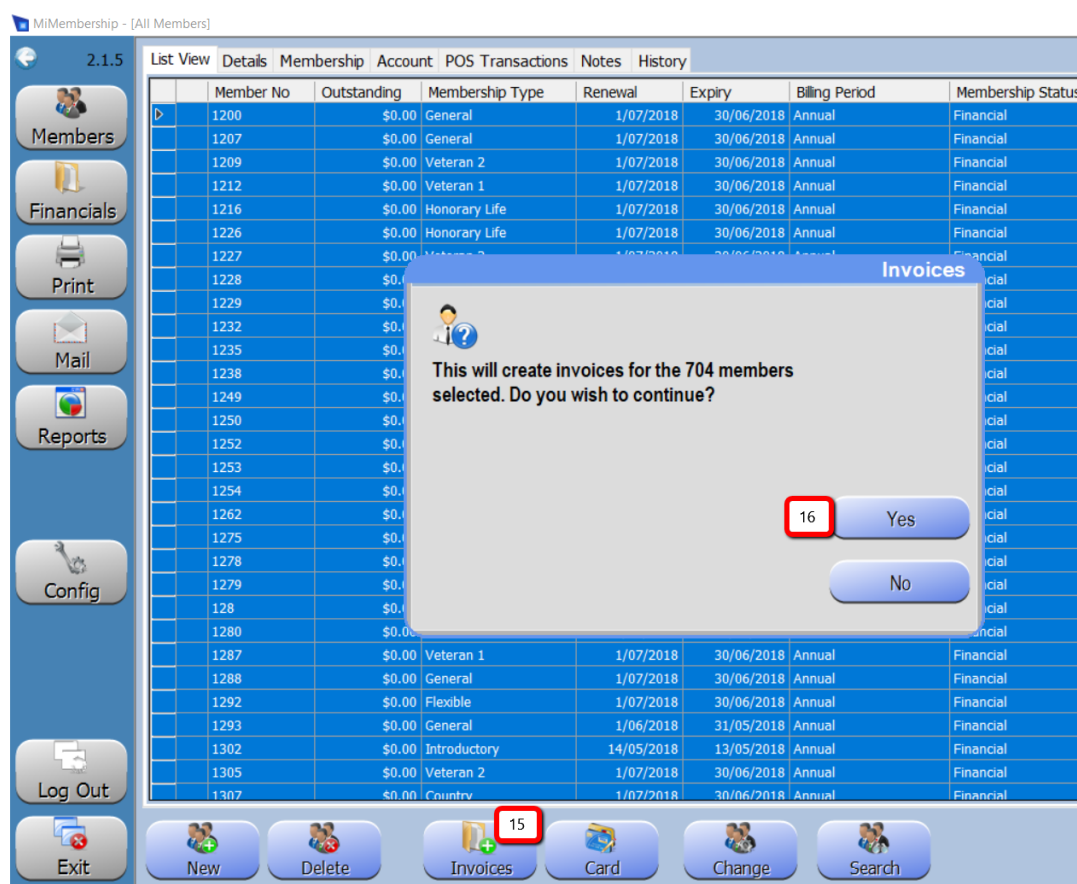
MiClub XClub 2+ (MiMembership)



Step 3 – Create Invoices

Create annual membership renewal invoices for all members using the Default charges applied in Step 2. Select our Saved Search or Build Search.

15. Highlight all members in the List View, then select Invoices+ icon (from menu located at bottom of screen)
16. Select Yes to continue
17. A second Invoice window will open, select Defaults
18. The create Invoice window will now open. Add an invoice reference i.e. Subs2018 and adjust invoice dates to your requirements
19. Add any notes (these will appear on the printed invoice) i.e. Membership Renewal 18/19
20. Tick or untick check box to create Payment Plan – ticking this box this will automatically create the payment plan for members who have this as their default payment method
21. Select Create – do not interrupt this process (it may take several minutes to process)
22. Select OK, once invoices completed



Membership Renewal Process

MiClub XClub 2+ (MiMembership)



MiMembership - [All Members]

2.1.5

List View Details Membership Account POS Transactions Notes History

Member No	Outstanding	Membership Type	Renewal	Expiry	Billing Period	Membership Status
1200	\$0.00	General	1/07/2018	30/06/2018	Annual	Financial
1207	\$0.00	General	1/07/2018	30/06/2018	Annual	Financial
1209	\$0.00	Veteran 2	1/07/2018	30/06/2018	Annual	Financial
1212	\$0.00	Veteran 1	1/07/2018	30/06/2018	Annual	Financial
1216	\$0.00	Honorary Life	1/07/2018	30/06/2018	Annual	Financial
1226	\$0.00	Honorary Life	1/07/2018	30/06/2018	Annual	Financial
1227						Financial
1228						Financial
1229						Financial
1232						Financial
1235						Financial
1238						Financial
1249						Financial
1250						Financial
1252						Financial
1253						Financial
1254						Financial
1262						Financial
1275						Financial
1278						Financial
1279						Financial
128						Financial
1280	\$0.00	Life Subscriber	1/07/2018	30/06/2018	Annual	Financial
1287	\$0.00	Veteran 1	1/07/2018	30/06/2018	Annual	Financial
1288	\$0.00	General	1/07/2018	30/06/2018	Annual	Financial
1292	\$0.00	Flexible	1/07/2018	30/06/2018	Annual	Financial
1293	\$0.00	General	1/06/2018	31/05/2018	Annual	Financial
1302	\$0.00	Introductory	14/05/2018	13/05/2018	Annual	Financial
1305	\$0.00	Veteran 2	1/07/2018	30/06/2018	Annual	Financial
1307	\$0.00	Country	1/07/2018	30/06/2018	Annual	Financial

MiMembership

Would you like to create invoices based on individual members charge types or create the same invoice for all?

17 Defaults

Same

Cancel

Members

Financials

Print

Mail

Reports

Config

Log Out

Exit

New

Delete

Invoices

Card

Change

Search

Invoice

Invoice Ref: SUBS18-19 18 Company: Golf Services Mangement

Invoice Date: 12/07/2019

Due Date: ☒ 11/08/2019

Notes: 19 - notes will appear below the invoice line items

☒ Create Payment Plan 20

Cancel 21 Create

Membership Renewal Process

MiClub XClub 2+ (MiMembership)



Step 4 – Print Invoices

Print invoices created in Step 3 as a group or by membership type.

If posting renewal invoices to one membership type at a time or a particular group of members, select Search and choose from your list of saved Searches or Build a new Search. Note: if you wish to email member invoices your Searches to post invoices should only include members without email addresses. Please contact MiClub Support if you require assistance

23. Select Financials (Invoices) icon from the Main Menu, select invoice tab
24. Enter Issue date range i.e. the invoice date
25. Tick box named Use Search Results
26. Highlight all invoices (click on the first row, hold down the keyboard Shift key and click the last row or hold down Control key and A)
27. Select Print icon from the Main Menu
28. Select Invoice to print individual invoices
29. A second window may open, select Yes if you want advance payments and outstanding amounts to appear on the invoice, or select No

Membership Renewal Process

MiClub XClub 2+ (MiMembership)



MiMembership - [Invoices]

2.1.5 Invoices Payments Unallocated Payments Payment Plan Account Balances

Issue Range ☒ 1/07/2018 ☒ 1/07/2018 ☐ Include Paid ☐ Include Deleted

Mem Type All ☐ Over Due Only ☐ Exclude Payment Plan

☐ Invoices Only ☒ Use Search Results ☐ Credit Notes Only

Invoice ID	Invoice Date	Total \$8,990.00	Outstanding \$8,990.00	Due Date	Start Date	End Date	Note
5	1/07/2018	\$990.00	\$990.00	30/07/2018	1/07/2018	30/06/2019	
24	1/07/2018	\$990.00	\$990.00	30/07/2018	1/08/2018	31/07/2019	
66	1/07/2018	\$1,030.00	\$1,030.00	30/07/2018	1/07/2018	30/06/2019	
80	1/07/2018	\$990.00	\$990.00	30/07/2018	1/07/2018	30/06/2019	
95	1/07/2018	\$990.00	\$990.00	30/07/2018	1/07/2018	30/06/2019	
120	1/07/2018	\$990.00	\$990.00	30/07/2018	1/07/2018	30/06/2019	
329	1/07/2018	\$990.00	\$990.00	30/07/2018	1/07/2018	30/06/2019	
332	1/07/2018	\$990.00	\$990.00	30/07/2018	1/07/2018	30/06/2019	
616	1/07/2018	\$1,030.00	\$1,030.00	30/07/2018	1/08/2018	31/07/2019	

MiMembership

Would you like to print a list of invoices or individual invoices?

List

Invoice

Cancel

30. The invoices will appear in the print preview screen

31. Select the printer icon from the print preview tool bar

a. Repeat print process for each membership Search list

MiMembership - [Report Viewer]

2.1.5

Members

5 24 66 80 332 95 616

31

Shep

Membership Renewal Process

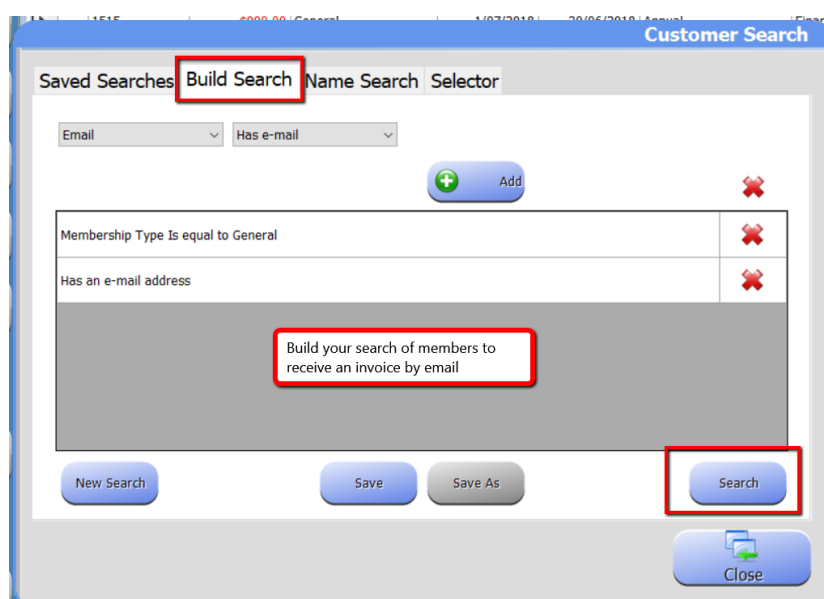
MiClub XClub 2+ (MiMembership)



Step 5 – Emailing Invoices

Email the invoices created in Step 3 as a group or by membership type. We recommend you create email and letter templates prior to creating your search lists.

32. Create and save a number of Searches of members with email addresses by membership type or specific group of members, then select one of the saved Search lists to open



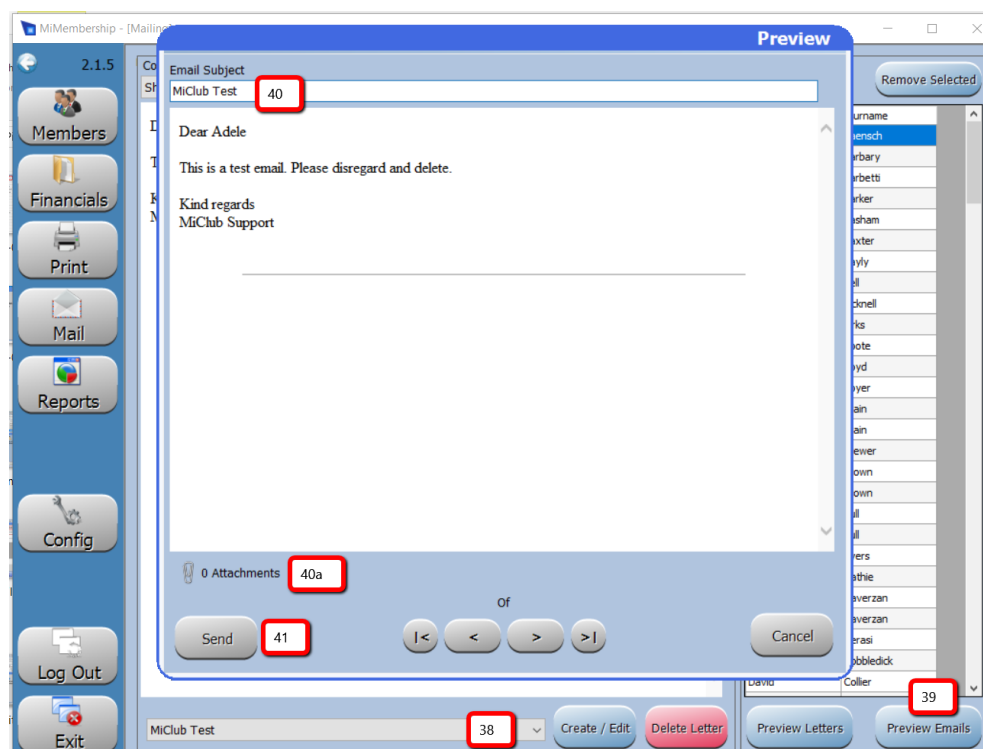
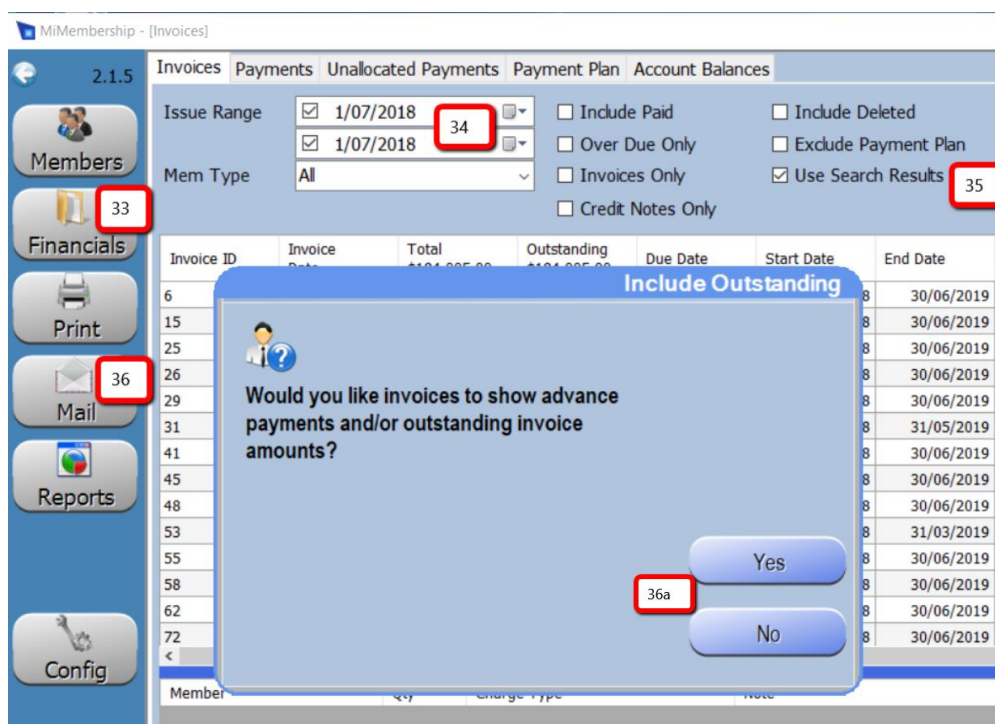
33. Select Financials (Invoices) from the main menu, and select Invoice tab
34. Enter Issue date range i.e. the invoice date
35. Tick check box Use Search Results
36. Select Mail icon from the main menu
 - a. The Include Outstanding window will appear if any members listed have any outstanding or advance payment balances, select Yes or No
37. The output bar will appear, this may take a few minutes as the system creates the PDF invoices
38. From the Mail screen, select your letter template from the drop menu (bottom of screen) – if creating a new letter go to Item 42
39. Select Preview Emails
40. Update email subject
 - a. attach any other PDF document i.e. a newsletter, to send with the invoices

Membership Renewal Process

MiClub XClub 2+ (MiMembership)



41. Select Send – this may take some time depending on your email server capabilities, do not interrupt this process
- a. Repeat Items 33 – 41 for each saved Search list



Membership Renewal Process

MiClub XClub 2+ (MiMembership)



42. To create a new letter, select Create/Edit.
43. Type in letter name i.e. Annual Membership Renewal, select OK
44. Select Create/edit Body, enter content (do not copy/paste content from another program such as Word or Outlook), select Save
 - a. Repeat create/edit for Footer and Header, as required
 - b. Select Save Letter
45. Select Preview Emails. Update email subject and attach any other PDF document i.e. a newsletter, to send with the invoices
46. Select Send
47. To print invoices for members without an email address follow the process outlined in Step 4 – create a Search for members with no email address