

HandicapMaster[®] Software

Quick Start Guide to Membership Subscriptions

This document provides a quick start for Users raising
Subscriptions in HandicapMaster[®]

Author: Stephen Jack
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Quick start guide to Membership

Introduction

Welcome to the HandicapMaster Membership and Subscriptions facility.

This quick guide will help you get started with issuing and managing membership subscriptions. More detailed information is available from the built in HandicapMaster help and also from the "Guide to Subscriptions, Invoices and Payment" document which is available for download from the HandicapMaster website.

<https://www.handicapmaster.org/support/documentation.php>

The flexible design of the Membership and Subscription facility permits your organisation to configure the system to your requirements.

However, to get you going we hope the following simple example will be of help.

You may find it helpful to print a copy of this document to help you as you work through the example.

A simple example.

For clarity this example will ignore such items as VAT, member subscription pools etc. and leave options at their default values. Where there are more advanced options available you may consult the detailed documentation.

For illustration purposes we will use the case of a Mr John Smith who wishes to join and pay his subscription in a single annual payment. To show the process from the start to the finish we will assume that he is the first member to request their membership. This means we need to create a new Subscription Template before we can issue a subscription letter.

By defining a "template" for this subscription, HandicapMaster will allow you to raise subscriptions for other members for the same items and at the same rates without having to recreate the subscription information each time.

The end result will be a Subscription letter which may be printed or sent by e-mail directly from HandicapMaster.

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HandicapMaster® 9.3.1

File Players Accounting Competitions Handicapping Reports View Help

Back Forward Edit Member Bookings Enter Scores Records Certificate Handicap List Publish Payment

Tasks Explorer Subscriptions Renewal

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Premier edition + Membership
The Meadow, Anytown, Countyshire
Tel No 123 456789

Subscription Letter

J. Smith
1 The Street
Anytown
Countyshire
POSTCODE

Member: John Smith
Invoice: 0000001
Invoice Date: Tuesday 21 August 2018

Subscription description: Annual 7 day full membership

Overdue Subscription Details:

Item	Amount	Notes
Adult - Full membership	£360.00	
Locker Fee	£24.00	
Total	£384.00	

Payment Schedule (Payments Due By):

Payment	Due Date	Amount Due	Status
1	Saturday 31 March 2018	£384.00	Overdue

There are a few simple steps you will need to perform to achieve this.

Step 1 Create a new Subscription Template

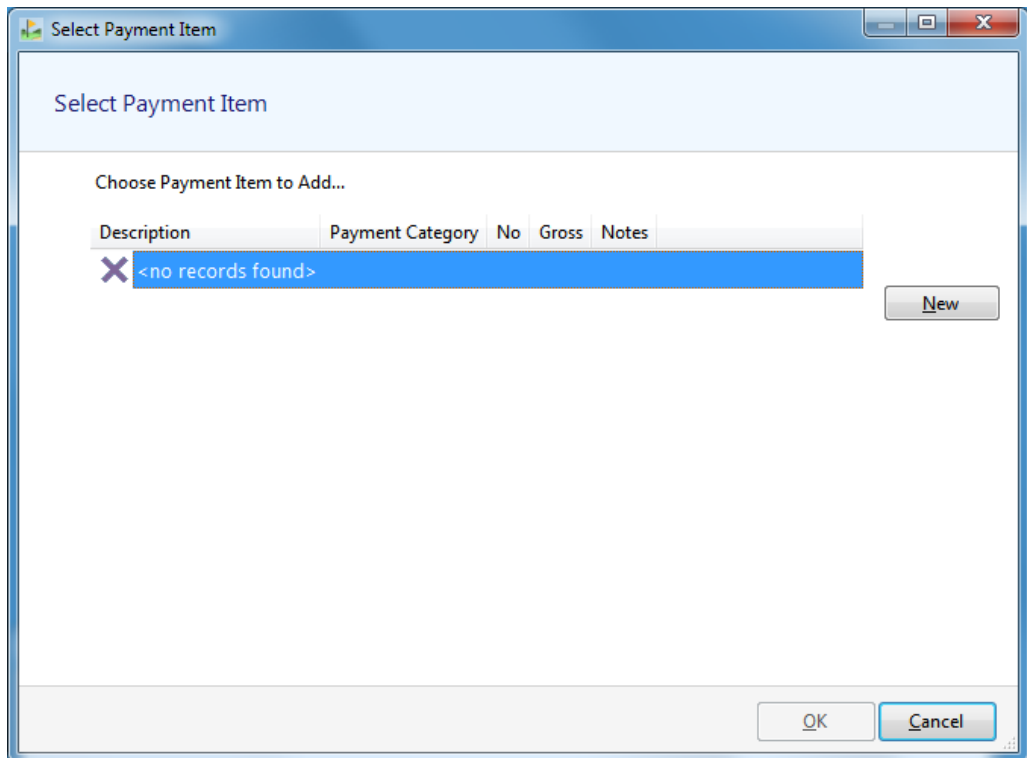
On the **Accounting** menu click **Subscriptions** then click **Set up a Template**. This will display the **Set up a Subscription Template** window.

The screenshot shows a software window titled "Subscriptions" with a sub-header "Set up a subscription template". It contains two text input fields: "Template name" with the value "Full membership" and "Template description" with the value "Annual 7 day full membership". Below these is a section titled "Payment Items" containing a table with four columns: "Category", "Description", "Gross Amount", and "Notes". The table is currently empty. To the right of the table are three buttons: "Add", "Delete", and "Delete All". At the bottom of the window are four buttons: "Help", "< Back", "Next >", and "Cancel".

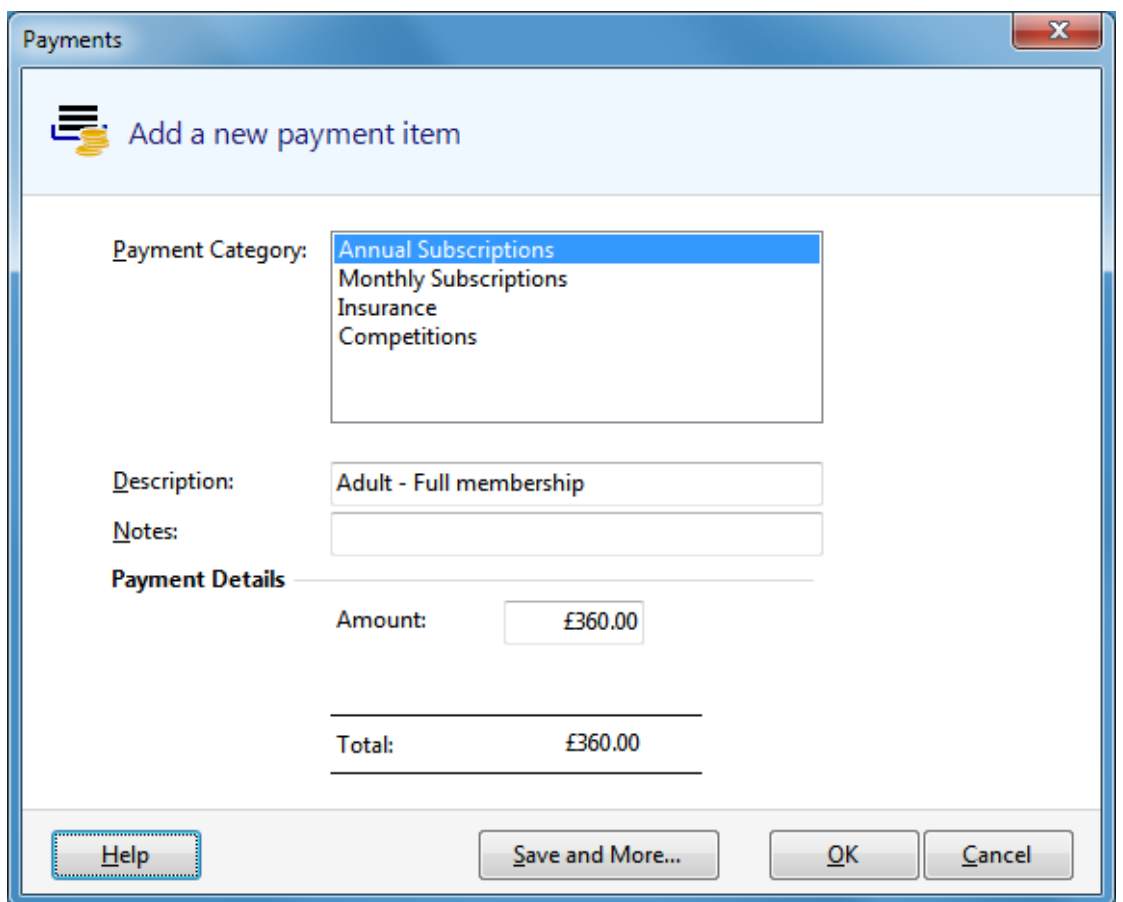
We have given the template a name of *Full Membership* and a template description of *'Annual 7 day full membership'*. A template name is required, the template description is optional but may help to manage templates.

The next step is to add one or more payment items to the template of this membership subscription. These are the items that the member will be required to pay for. To do this click on the **Add** button

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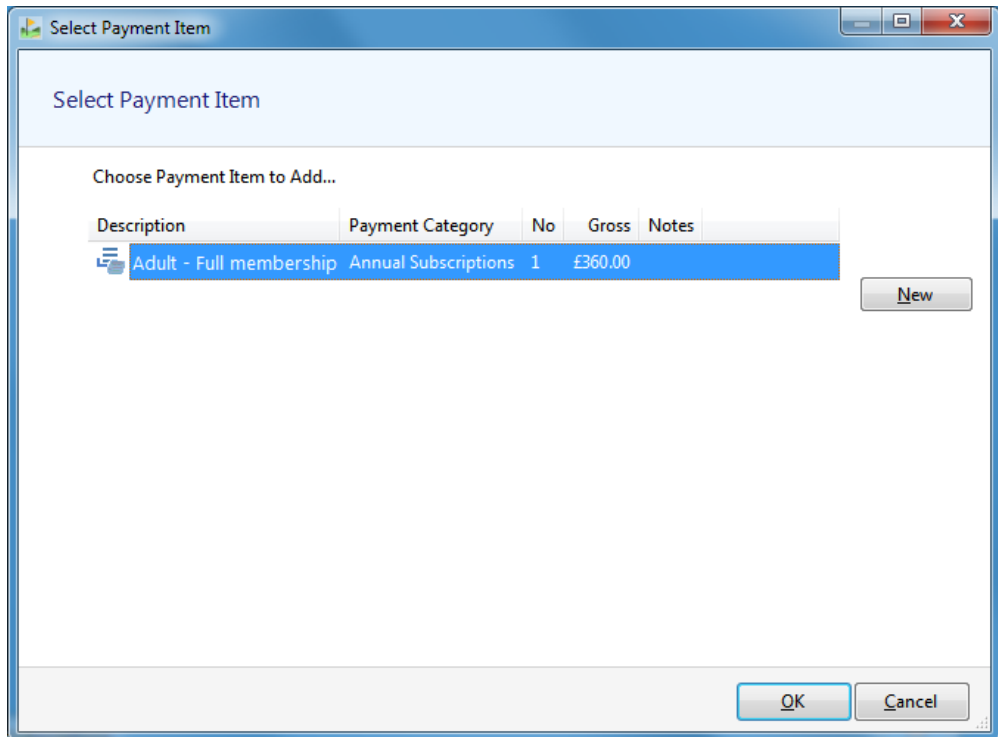


The first time you run the membership option there will be no Payment Items defined so click **New** and add a Payment Item with a description of 'Adult - Full Membership' and give it value of £360

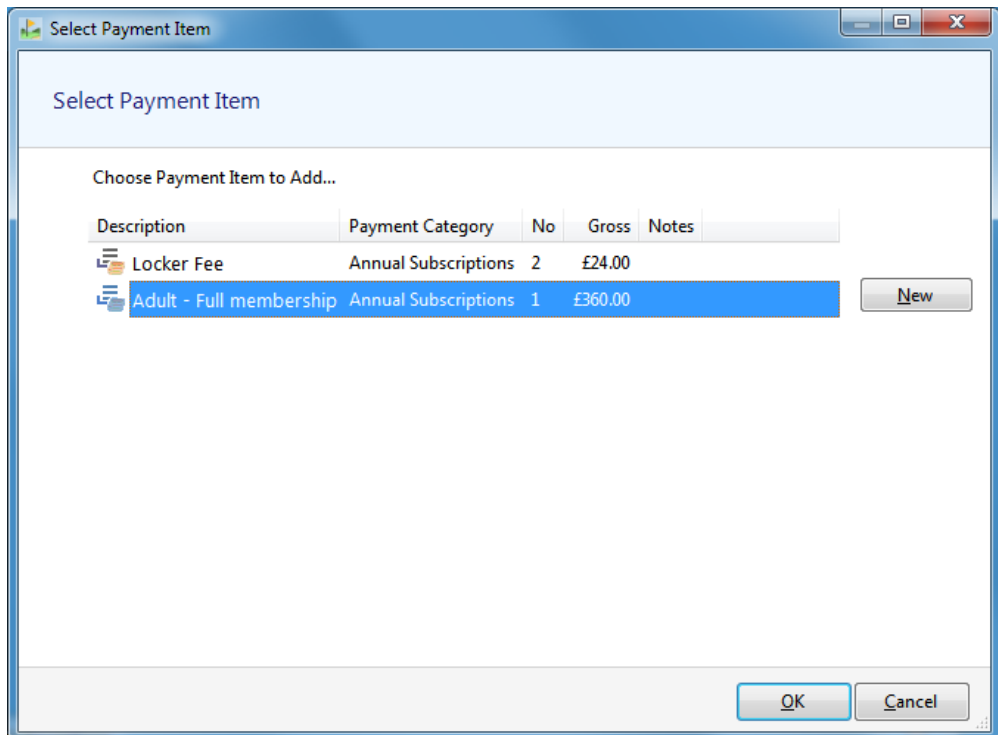


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Click OK to save the Payment Item, the list is then updated with the added item.



Now add another payment item by clicking **New**, give this a description of *Locker Fee* and give it a value of £24. So the list is now



Click on the payment item '*Adult - Full Membership*' to highlight it and click **OK**, the Subscription Template now looks as follows:

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Subscriptions

Set up a subscription template

Template name: Full membership

Template description: Annual 7 day full membership

Payment Items:

Category	Description	Gross Amount	Notes
Annual Subscriptions	Adult - Full membership	£360.00	£0.00
TOTAL		£360.00	

Buttons: Add, Delete, Delete All

Buttons: Help, < Back, Next >, Cancel

Click the Add button and add the *Locker Fee* to the template

Subscriptions

Set up a subscription template

Template name: Full membership

Template description: Annual 7 day full membership

Payment Items:

Category	Description	Gross Amount	Notes
Annual Subscriptions	Adult - Full membership	£360.00	£0.00
Annual Subscriptions	Locker Fee	£24.00	£0.00
TOTAL		£384.00	

Buttons: Add, Delete, Delete All

Buttons: Help, < Back, Next >, Cancel

Click Next >

Leave the 'Payment Schedule' as the default of 'Annual'

For the First Payment Due select 'Other date' and select 1st March 2018

The screenshot shows a window titled "Subscriptions" with a close button in the top right corner. Below the title bar is a header area with a folder icon and the text "Set up a subscription template". The main content area is divided into three sections:

- Payment Schedule:** A dropdown menu is set to "Annual".
- First Payment Due:** Three radio buttons are present: "Date subscription raised" (unselected), "Other date:" (selected), and "Anniversary of Date Joined" (unselected). The "Other date:" field is a date picker showing "Thursday 1 March 2018".
- Expiry Date:** A text field shows "Subscription Expiry: Friday 1 March 2019".

At the bottom of the window, there are four buttons: "Help", "< Back", "Next >", and "Cancel".

Click Next >

You will see the payments and amounts due. For payment schedules other than annual it will be possible to adjust the payments. See the detailed documentation for further information.

Subscriptions

Set up a subscription template

Payment Details

Payment	Gross
<input checked="" type="checkbox"/> Month 1	£384.00
<input type="checkbox"/> Month 2	£0.00
<input type="checkbox"/> Month 3	£0.00
<input type="checkbox"/> Month 4	£0.00
<input type="checkbox"/> Month 5	£0.00
<input type="checkbox"/> Month 6	£0.00
<input type="checkbox"/> Month 7	£0.00
<input type="checkbox"/> Month 8	£0.00
<input type="checkbox"/> Month 9	£0.00
<input type="checkbox"/> Month 10	£0.00
<input type="checkbox"/> Month 11	£0.00
<input type="checkbox"/> Month 12	£0.00
Total:	£384.00

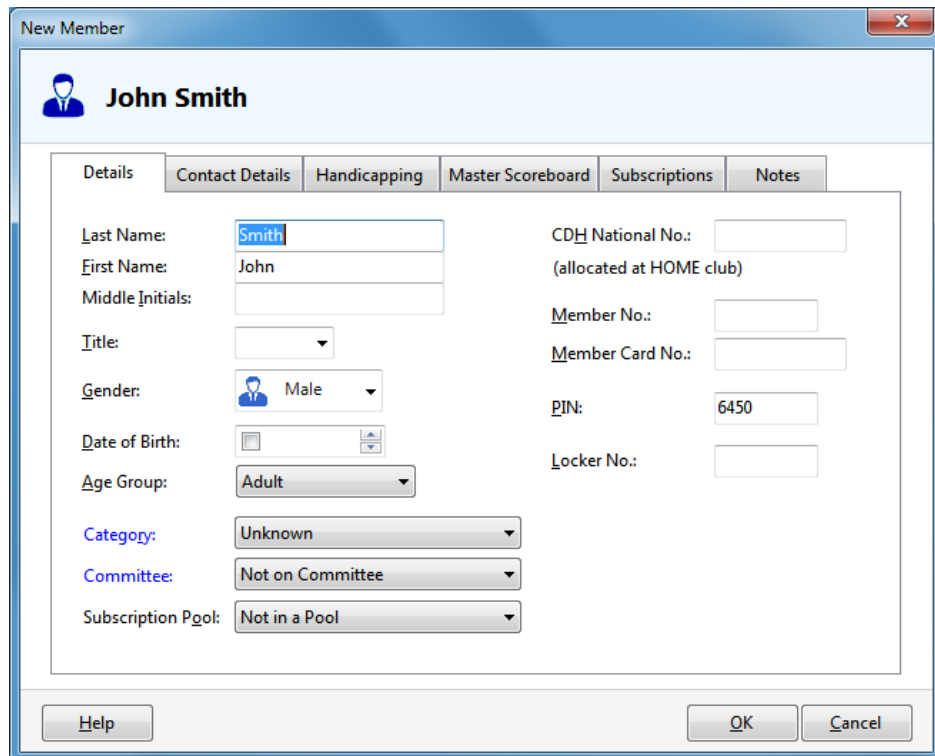
Adjust Payments

Help < Back Finish Cancel

Now save the template by clicking FINISH

Step 2 Add member to the database and assign them a subscription

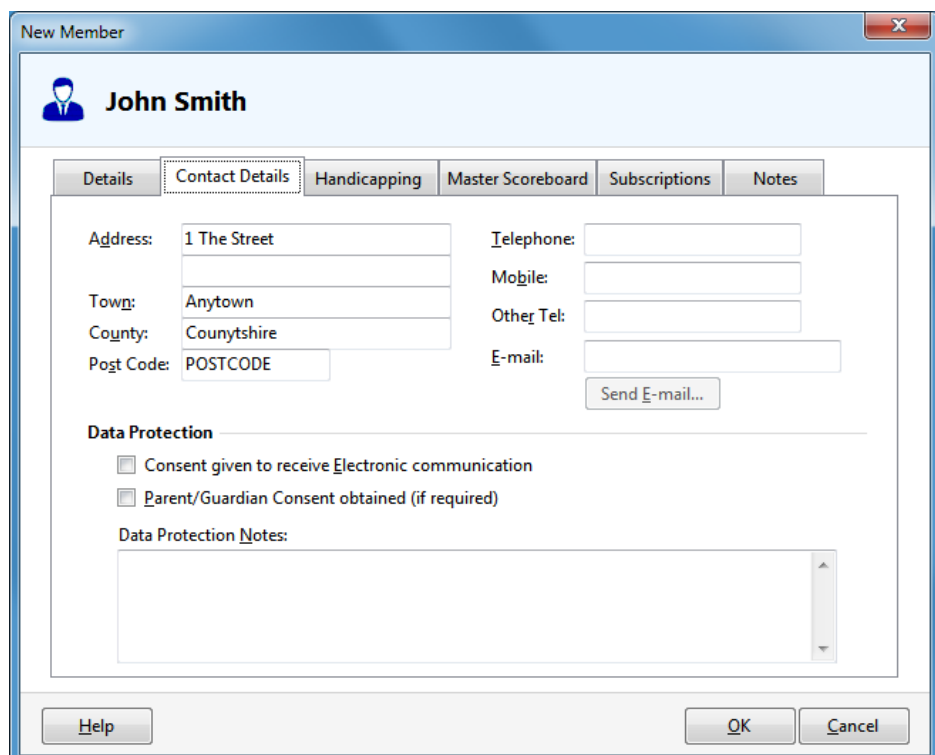
On the Players menu click **New Member** and enter their name



The screenshot shows the 'New Member' window with the 'Details' tab selected. The member's name is 'John Smith'. The form contains the following fields and values:

Field	Value
Last Name	Smith
First Name	John
Middle Initials	
Title	
Gender	Male
Date of Birth	
Age Group	Adult
Category	Unknown
Committee	Not on Committee
Subscription Pool	Not in a Pool
CDH National No.	
Member No.	
Member Card No.	
PIN	6450
Locker No.	

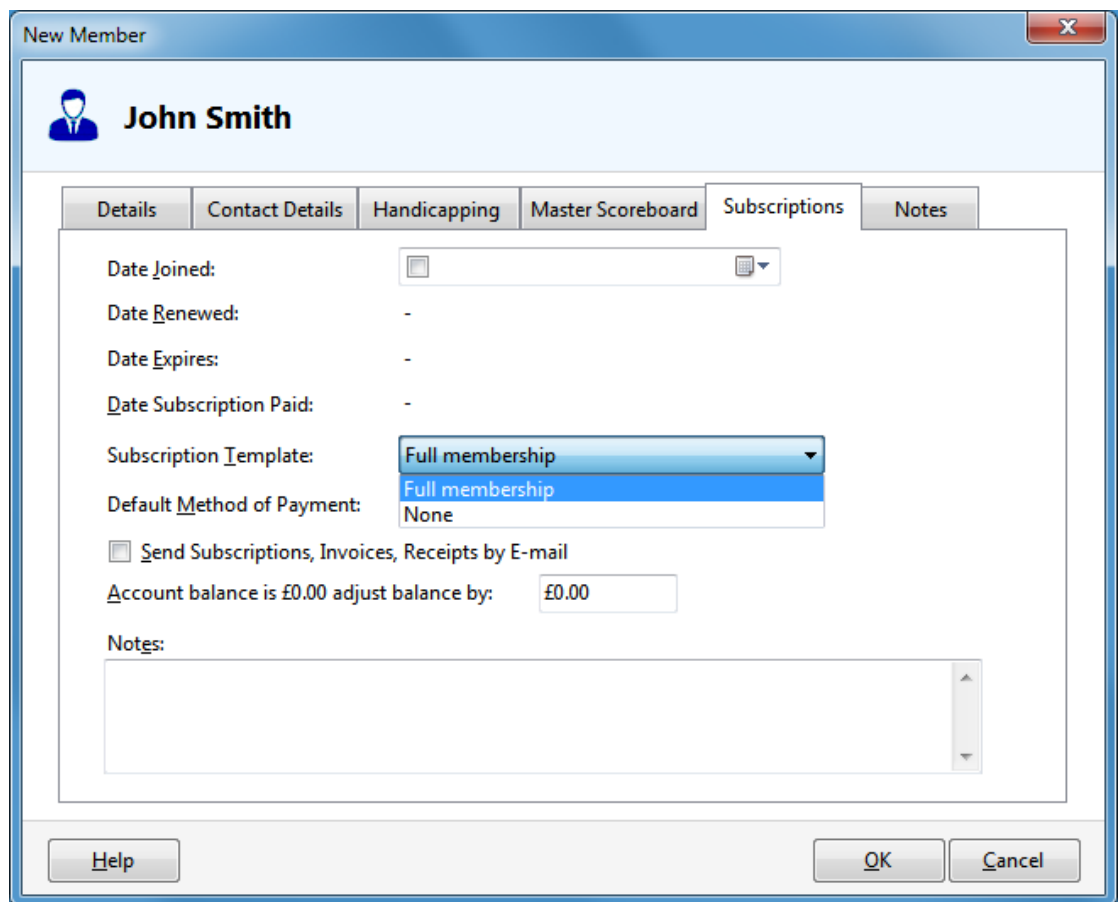
Click on the Contact Details Tab and enter address details.



The screenshot shows the 'New Member' window with the 'Contact Details' tab selected. The member's name is 'John Smith'. The form contains the following fields and values:

Field	Value
Address	1 The Street
Town	Anytown
County	Counytshire
Post Code	POSTCODE
Telephone	
Mobile	
Other Tel	
E-mail	
<input type="checkbox"/> Consent given to receive Electronic communication	
<input type="checkbox"/> Parent/Guardian Consent obtained (if required)	
Data Protection Notes:	

Then click on the Subscriptions Tab



The screenshot shows a window titled "New Member" for a member named "John Smith". The window has several tabs: "Details", "Contact Details", "Handicapping", "Master Scoreboard", "Subscriptions", and "Notes". The "Subscriptions" tab is active. It contains the following fields and options:

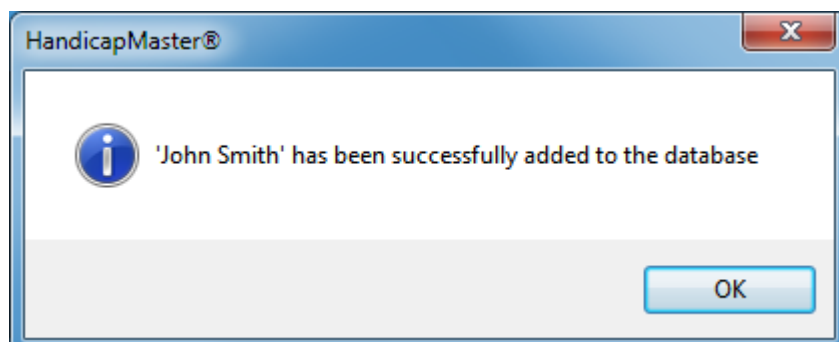
- Date Joined: [calendar icon]
- Date Renewed: -
- Date Expires: -
- Date Subscription Paid: -
- Subscription Template: Full membership (dropdown menu is open showing "Full membership" and "None")
- Default Method of Payment: [dropdown menu]
- Send Subscriptions, Invoices, Receipts by E-mail
- Account balance is £0.00 adjust balance by: £0.00
- Notes: [text area]

Buttons at the bottom: Help, OK, Cancel.

On the Subscription template item click and select the *Full Membership* subscription template that is to be assigned to this member. If you wish you may record the date of joining of this member. The other date items will be filled in automatically based on the subscriptions raised.

If required chose a default method of payment, this can be useful if you need to identify members paying by a specific means, e.g. Direct Debit, Standing Order

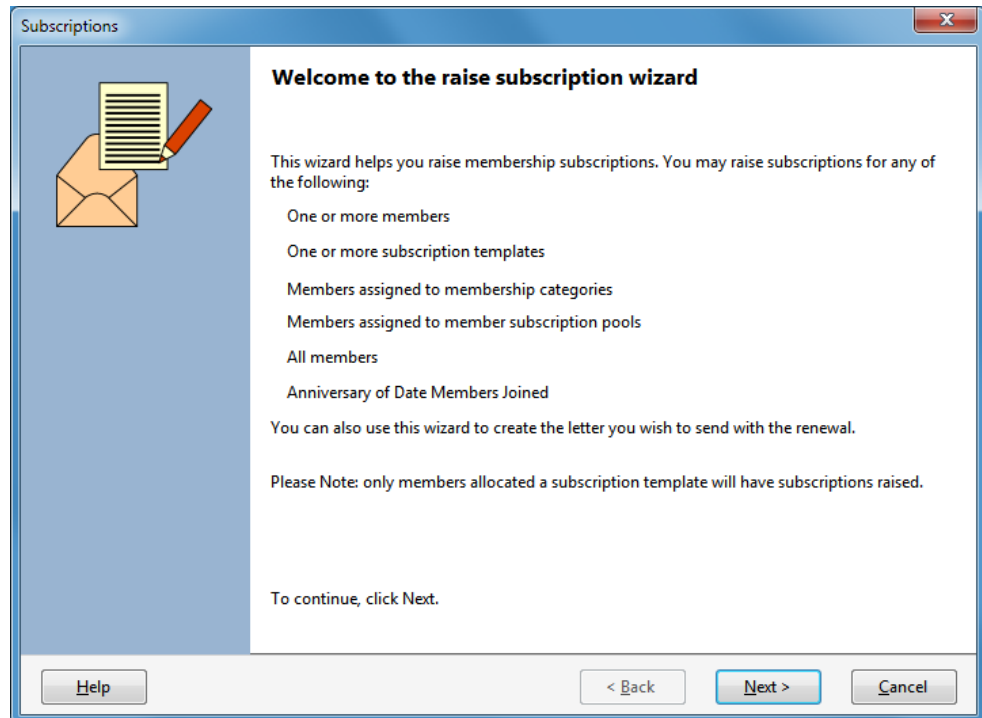
If the member wishes to receive subscription invoices and receipts by e-mail tick the appropriate box. The member's e-mail address must have been entered to allow this option to be used. Then click OK to save the Member's details and click OK to the confirmation message



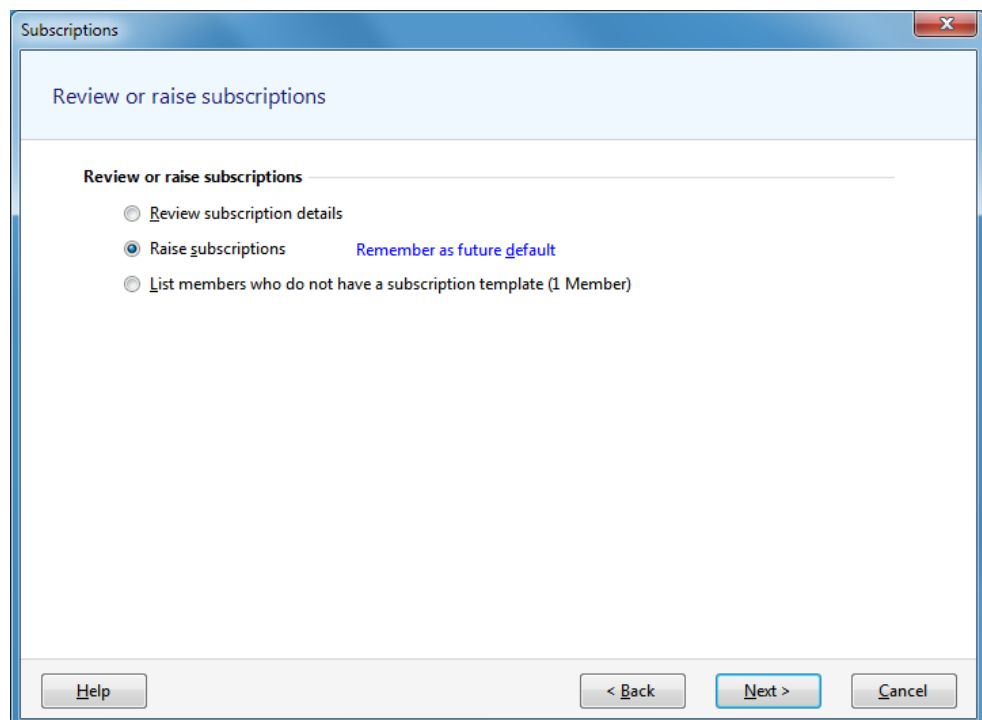
Step 3 Raise subscriptions

You can now raise the subscription invoice for John Smith.
On the **Accounting** menu click **Subscriptions** then click **Raise Subscriptions**.

You will see the **Welcome to the raise subscription Wizard**



Click **Next >** and you will see the option to Review or Raise Subscriptions.



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The review option is recommended prior to conducting a subscription run for your members. For simplicity we will ignore this step. Select **Raise Subscriptions** (You may choose to make this the default action.)

Click **Next >** and you will see the **Select method of raising renewals** window.

Subscriptions

Select method of raising renewals

Create a subscription renewal for _____

- One or more members
- One or more subscription templates
- Members assigned to membership categories
- Members assigned to member subscription goals
- All members
- Member's anniversary of date joined

Help < Back Next > Cancel

Leave this at the default of **One or more members** and click **Next >** To display the list of members, locate the member in question, a quick way is to type the first few letters of the surname.

Subscriptions

Choose one or more members to generate renewals for

Select members to receive a renewal _____

Tick the box alongside any members for whom you wish to generate a subscription renewal:

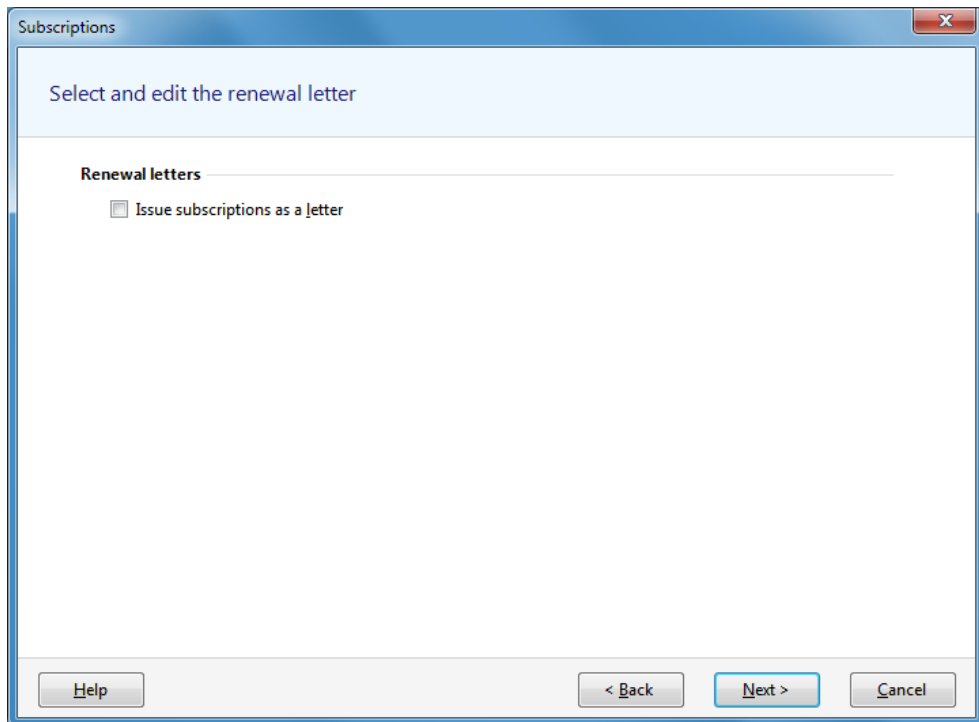
Name	Memb. No.	Memb Category	Age Group	Pay Method	Subscrip
<input type="checkbox"/> GREEN, Bill		Unknown	Adult	Unknown	
<input checked="" type="checkbox"/> SMITH, John		Unknown	Adult	Unknown	Full m

Select All

Clear All

Help < Back Next > Cancel

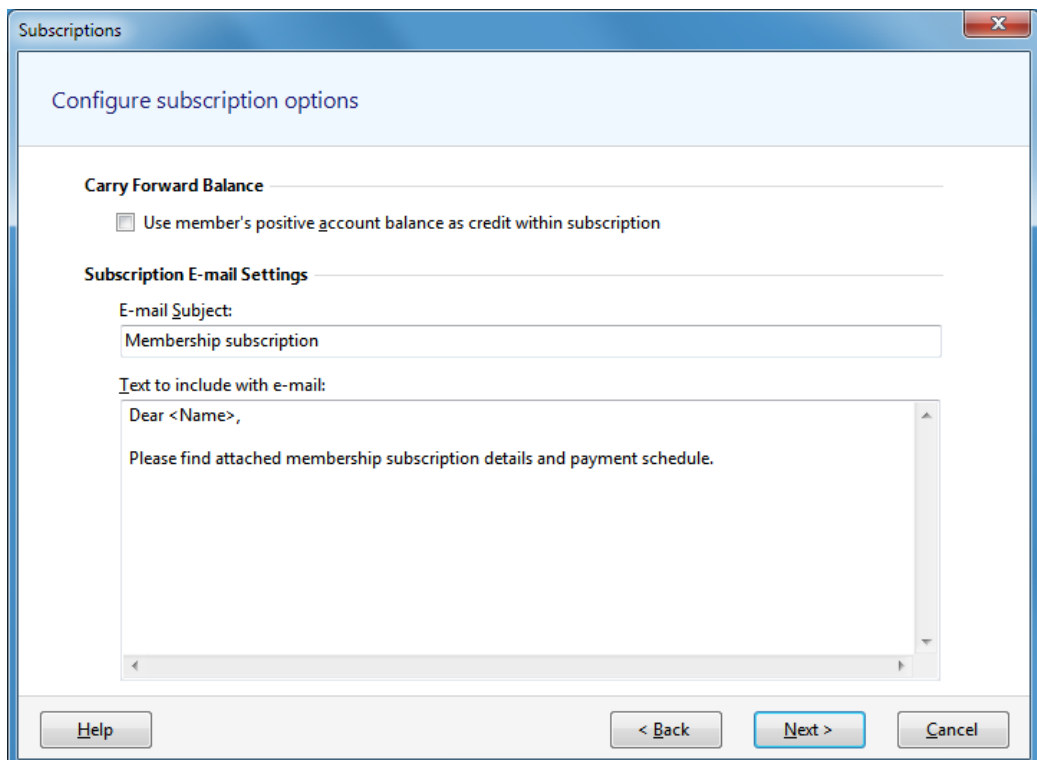
Continuing with our newly added member John Smith tick the box next to his name and then click **Next >**



The screenshot shows a window titled "Subscriptions" with a close button in the top right corner. The main heading is "Select and edit the renewal letter". Below this, there is a section titled "Renewal letters" with a horizontal line underneath. A checkbox labeled "Issue subscriptions as a letter" is present and is currently unchecked. At the bottom of the window, there are four buttons: "Help", "< Back", "Next >", and "Cancel".

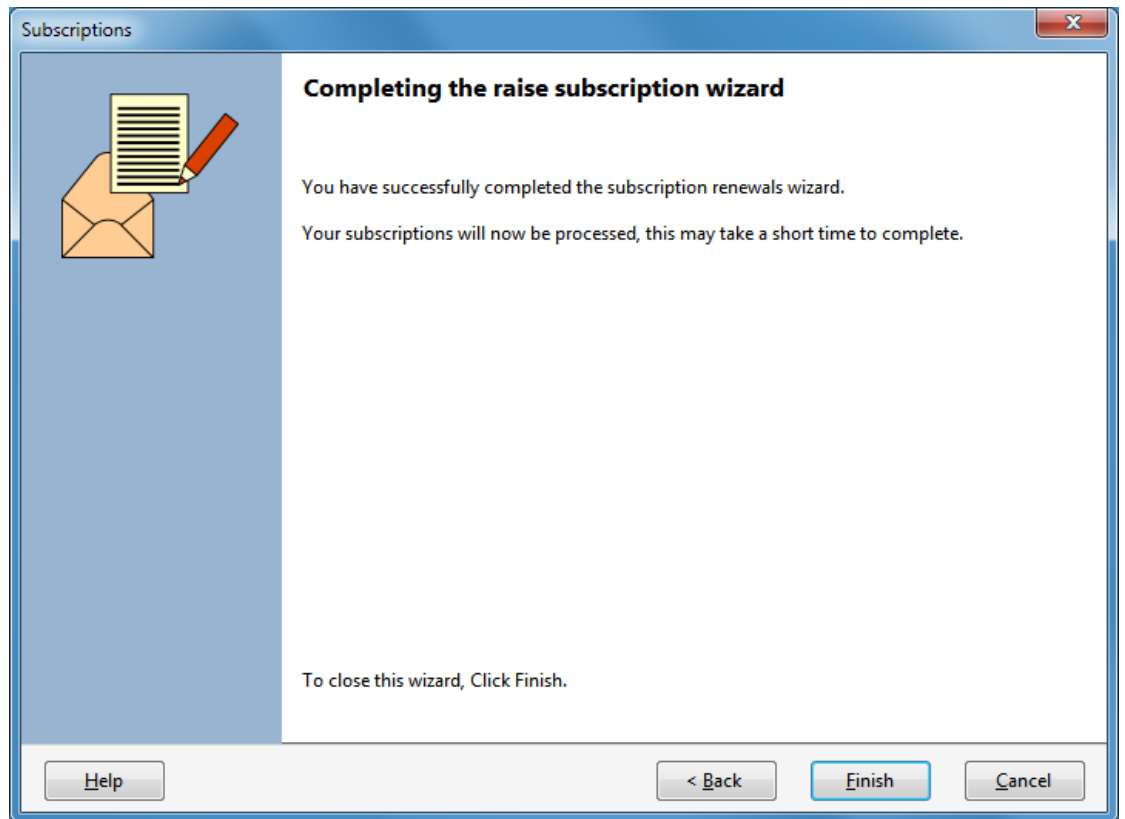
You now have the choice to create a subscription letter or standard subscription invoice. In this case we will use the standard format. Click **Next >**

You will now be offered some further options. For this example please leave these at the defaults.



The screenshot shows a window titled "Subscriptions" with a close button in the top right corner. The main heading is "Configure subscription options". Below this, there are two sections. The first is "Carry Forward Balance" with a horizontal line underneath, containing a checkbox labeled "Use member's positive account balance as credit within subscription". The second section is "Subscription E-mail Settings" with a horizontal line underneath. It contains two text input fields: "E-mail Subject:" with the value "Membership subscription", and "Text to include with e-mail:" with the value "Dear <Name>," followed by "Please find attached membership subscription details and payment schedule." At the bottom of the window, there are four buttons: "Help", "< Back", "Next >", and "Cancel".

Click **Next** >



Then click **Finish** to generate the subscription letter

This letter (see page 4 near the top of this document) can then be printed, saved, or e-mailed.

A Subscription will also be recorded in the database and payments can be recorded against it. Reports can also be used to determine if a subscription is overdue etc.

More detailed information is available from the built in help in HandicapMaster and also from the "Guide to Membership" document which is available for download from the HandicapMaster website.

<https://www.handicapmaster.org/support/documentation.php>