HandicapMaster® Software

Quick Start Guide to Membership Subscriptions

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

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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.

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.


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
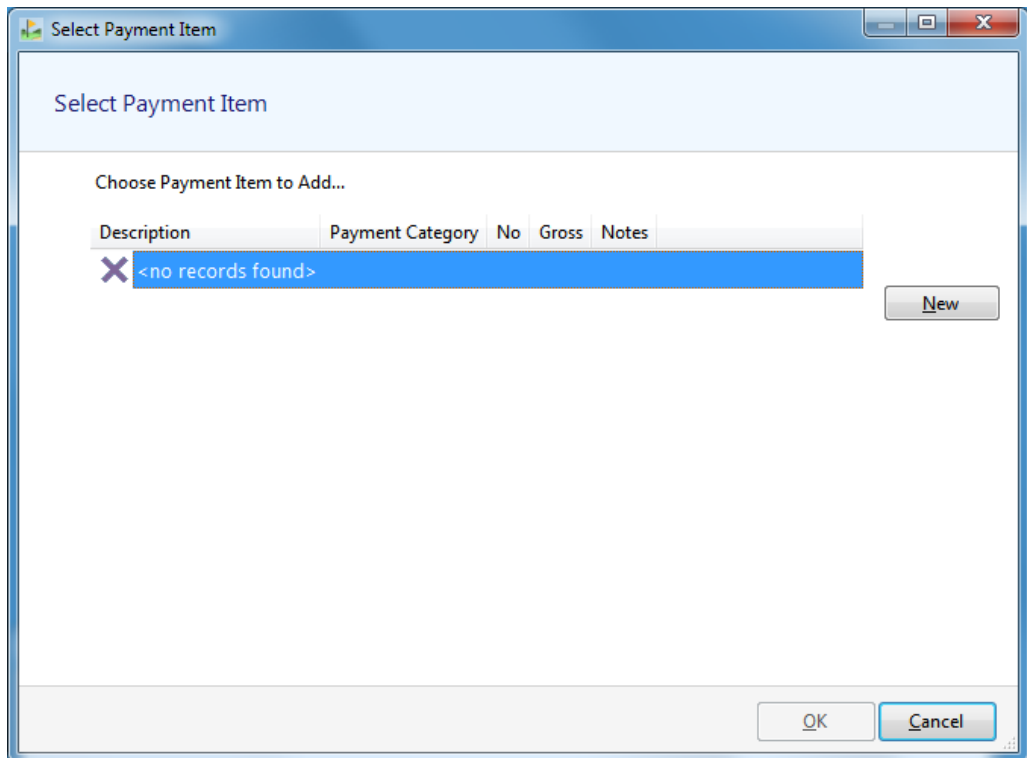
The first time you run the membership option there will be no Payment Items defined so click **New** and add a Payment Item with a description of '*Adult - Full Membership*' and give it value of £360
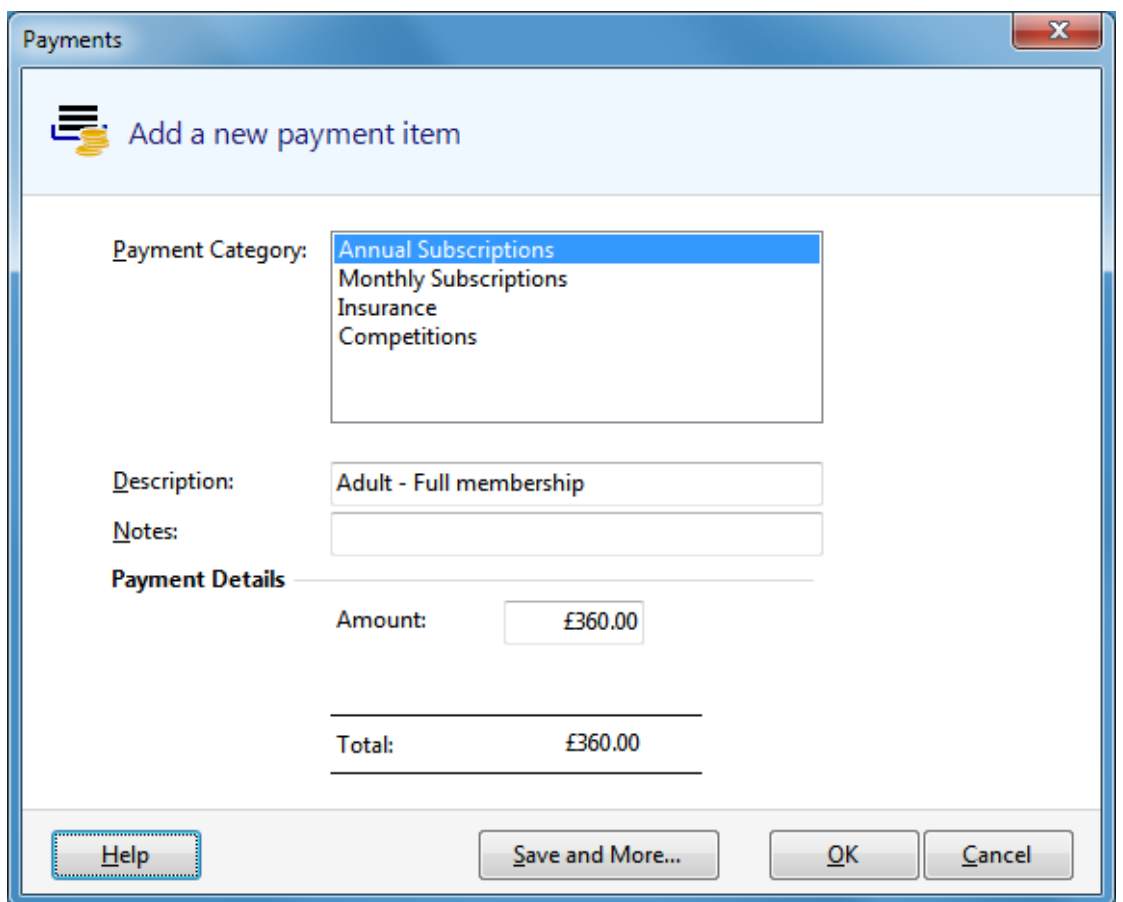
Click OK to save the Payment Item, the list is then updated with the added item.
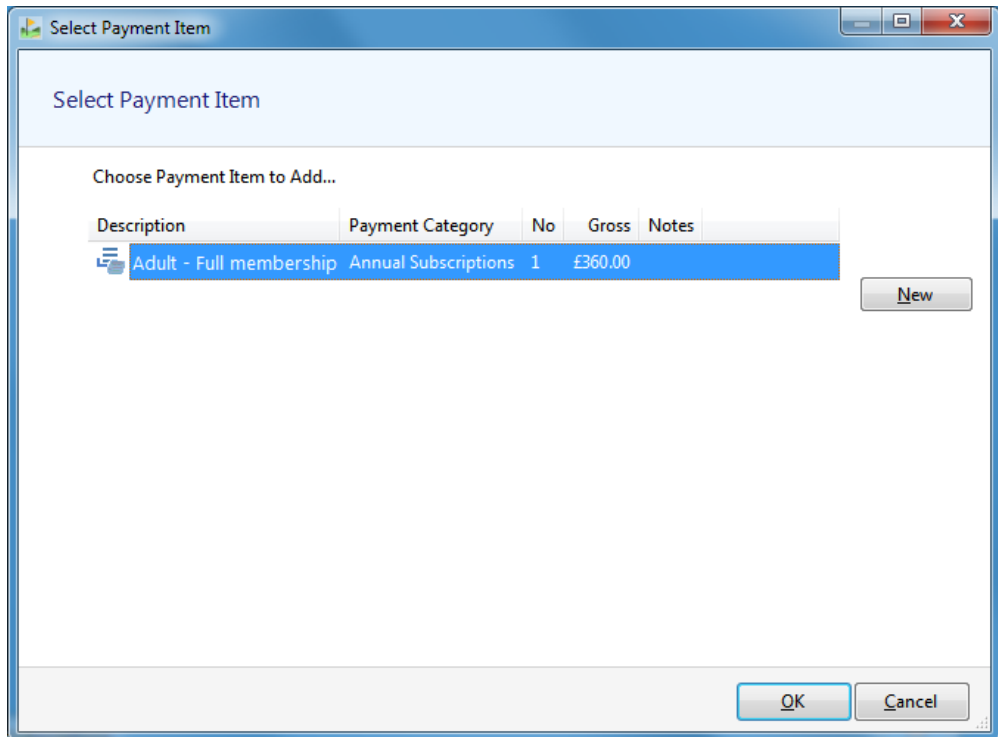
Now add another payment item by clicking **New**, give this a description of *Locker Fee* and give it a value of £24. So the list is now
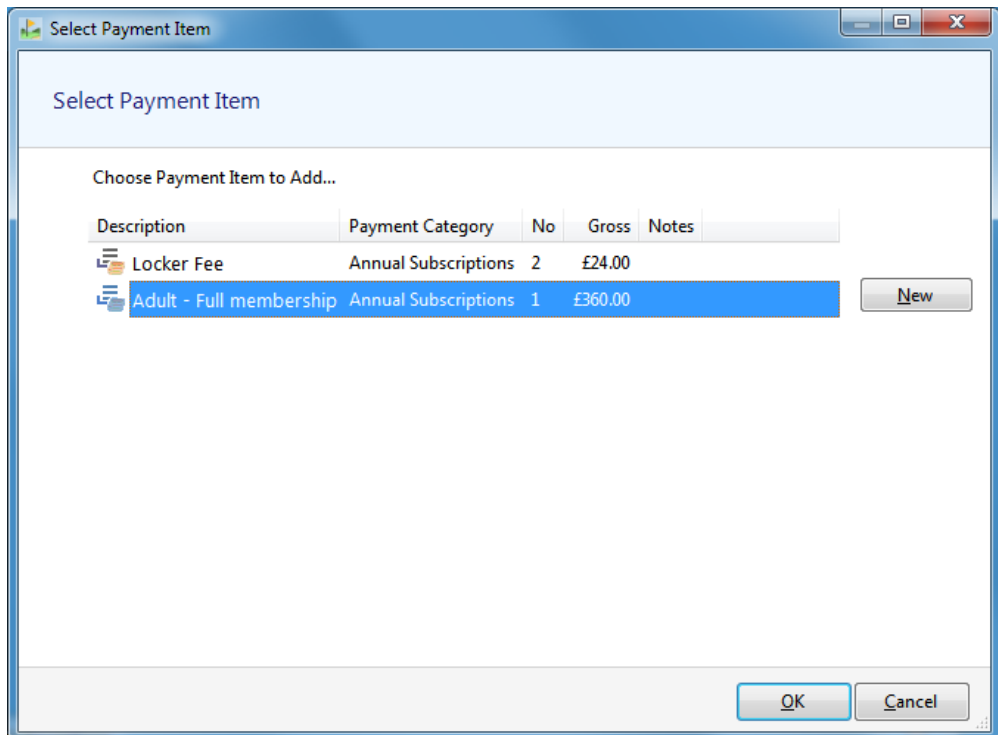
Click on the payment item 'A*dult - Full Membership'* to highlight it and click **OK**, the Subscription Template now looks as follows:

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

Click Next >

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

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

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.

Now save the template by clicking FINISH

Step 2 Add member to the database and assign them a subscription
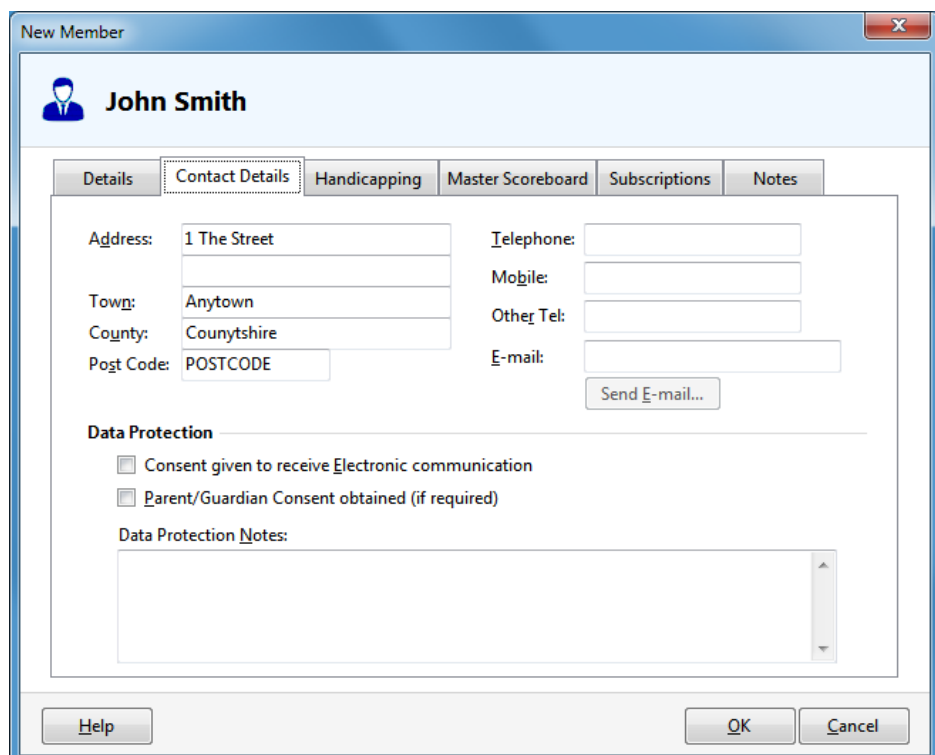
On the Players menu click **New Member** and enter their name
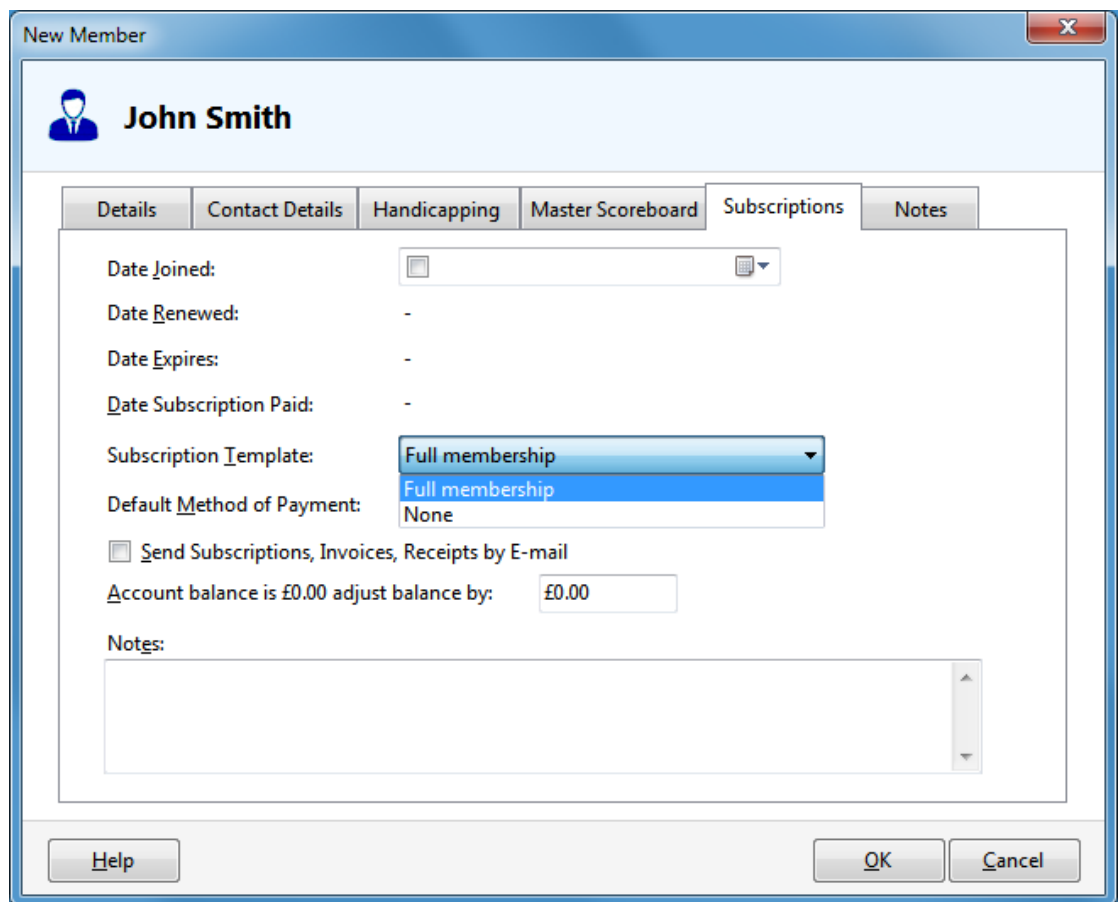
Click on the Contact Details Tab and enter address details.

Then click on the Subscriptions Tab

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
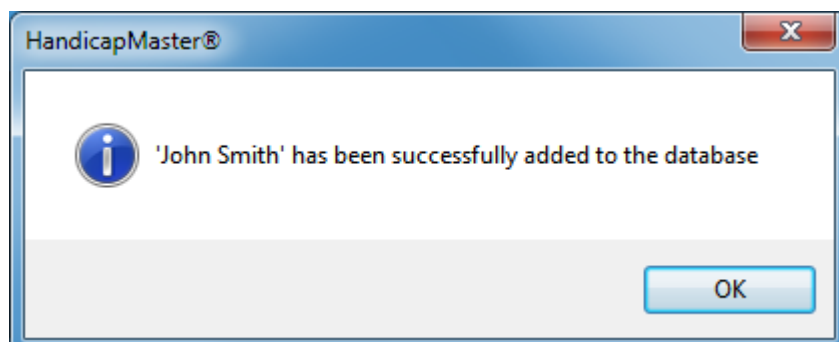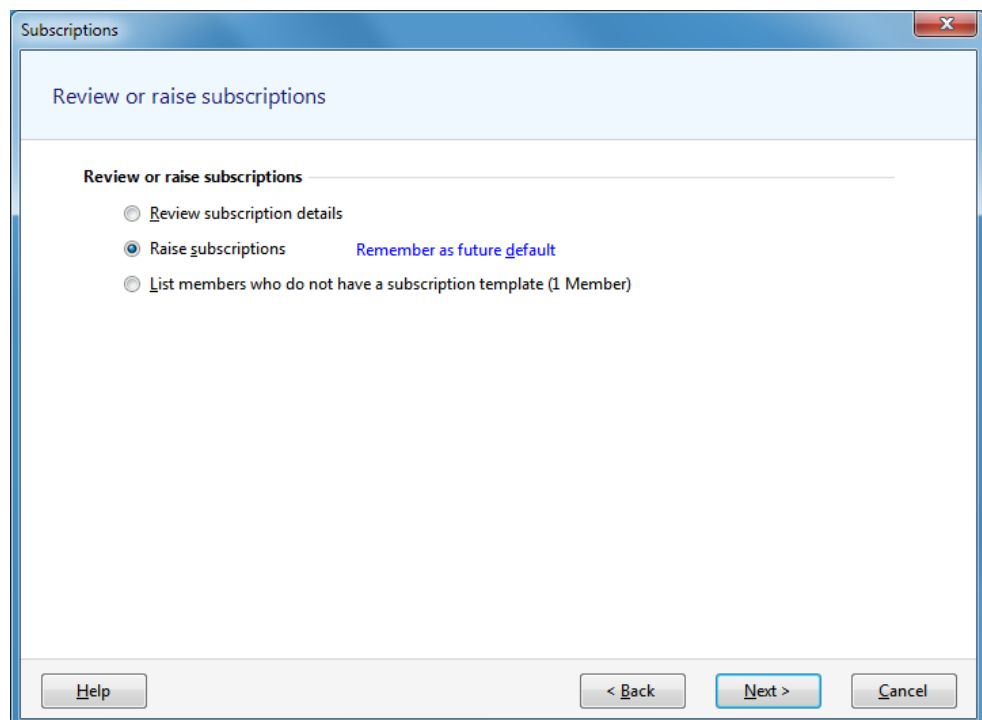
Step 3 Raise subscriptions

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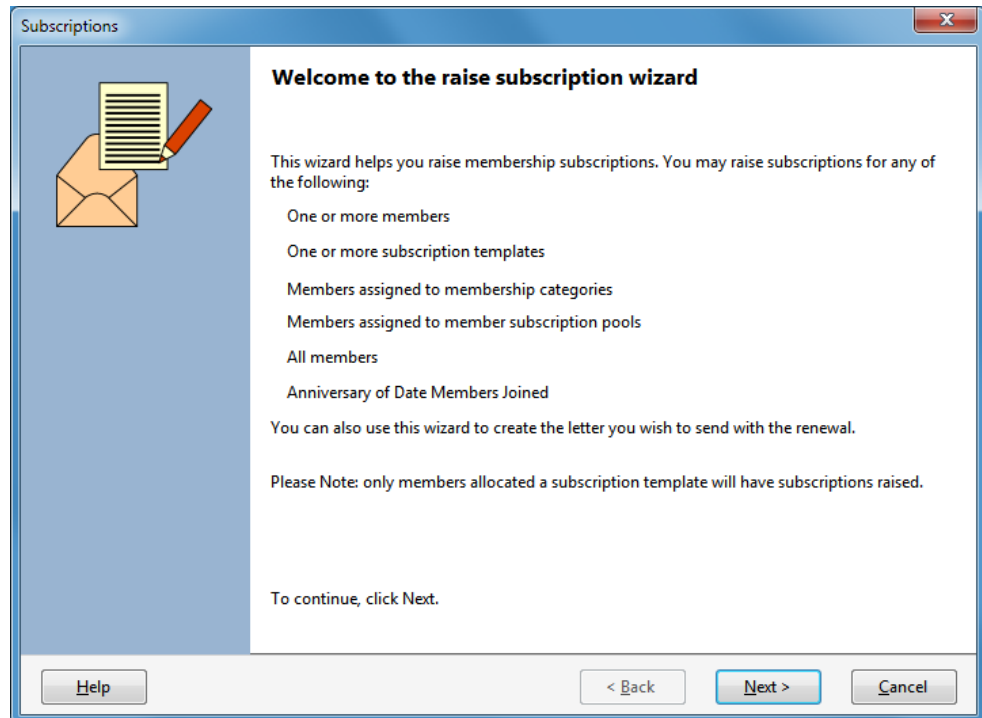
Click **Next >** and you will see the option to Review or Raise Subscriptions.

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.

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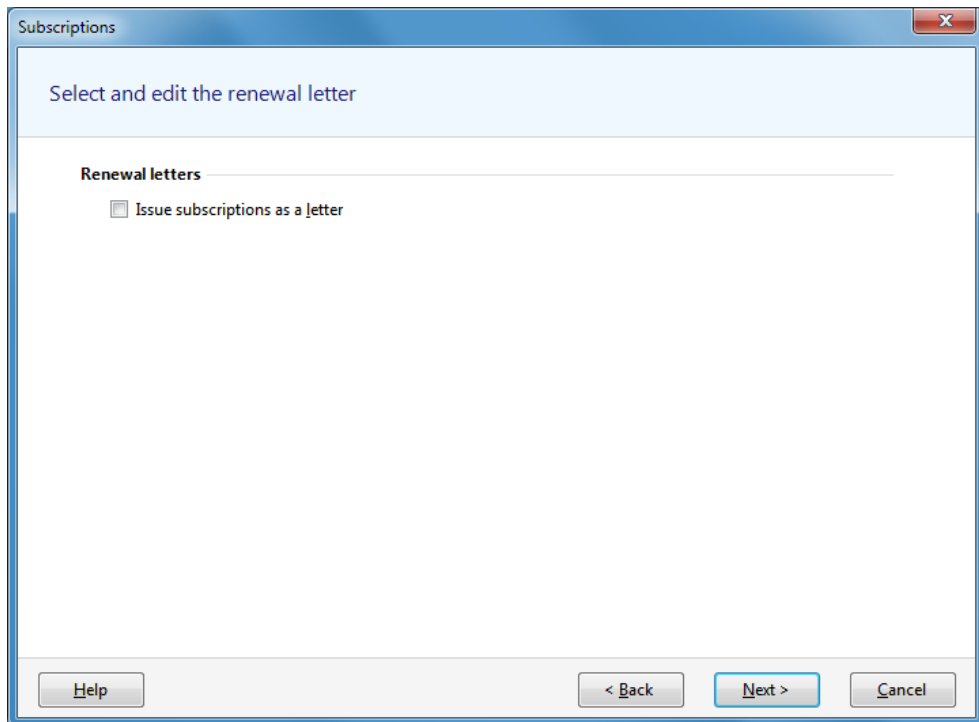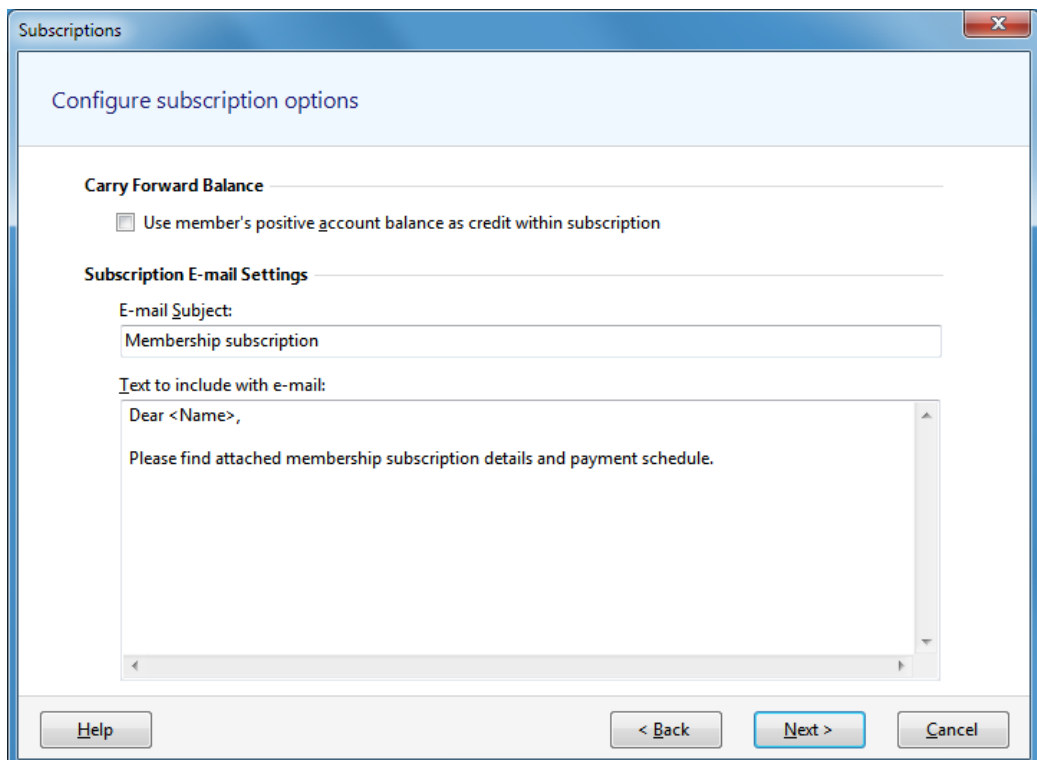
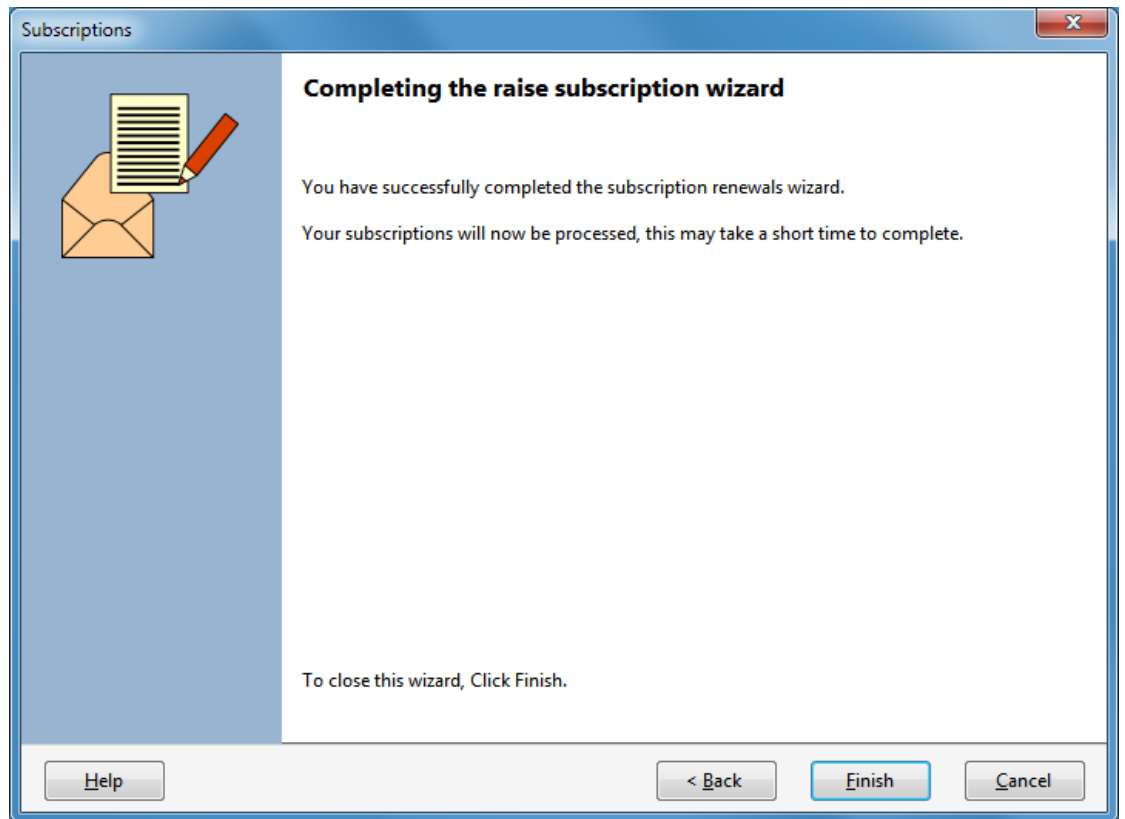Continuing with our newly added member John Smith tick the box next to his name and then click **Next >**

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.

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.

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