

Lesson 2- Fine tuning member categories & adding members

Family membership creation

In Lesson 1- it was explained how to create your clubs membership categories. It wasn't pointed out however how to create a Family membership category or any category that requires more than one person allocated. You may have worked this out already, but just in case...

You need to ensure that under that Membership Category's edit field (Club details >Adjust Membership types >Edit) the *Group* membership box is set to "Yes". Once this is set- extra people can be added to Family membership easily.

TEST - Edit TestClub Member Type - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Refresh Print Mail Stop

Address http://www.caves.org.au/membership_test/admin/editMemberType.jsp?club=6&membershipType=31 Go Links >>

TEST - Edit TestClub Member Type

TestClub Membership Details

Name

Price

Discontinued A discontinued membership cannot be chosen or renewed.

Group Membership A group membership supports more than one member on the membership. Group memberships also support the notion of a "primary contact", who is the default contact for the purposes of **Postal Contacts** reports.

Default Duration

Renew As

Contact Only Memberships that are set as "contact only" *do not* appear by default on **Membership** reports, but do appear on the **Postal Contacts** reports. A "contact only" membership is generally *not* a real member. Memberships of this type are usually reserved for non-member postal contacts, eg. libraries, other clubs, etc., and also usually have the membership duration set to "life".

Linkage

admin login as Test Admin - Admin Home Logout - Member Search

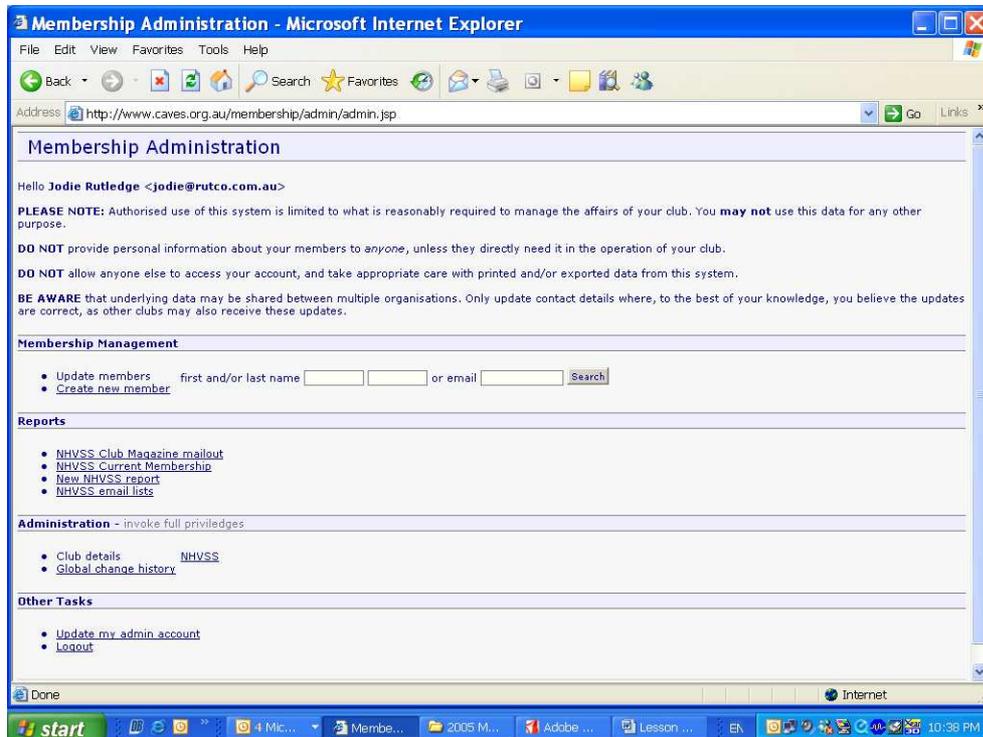
Done Internet

Adding Your Members

Step 1: Login to your clubs database via the logon screen as explained in Lesson 1.

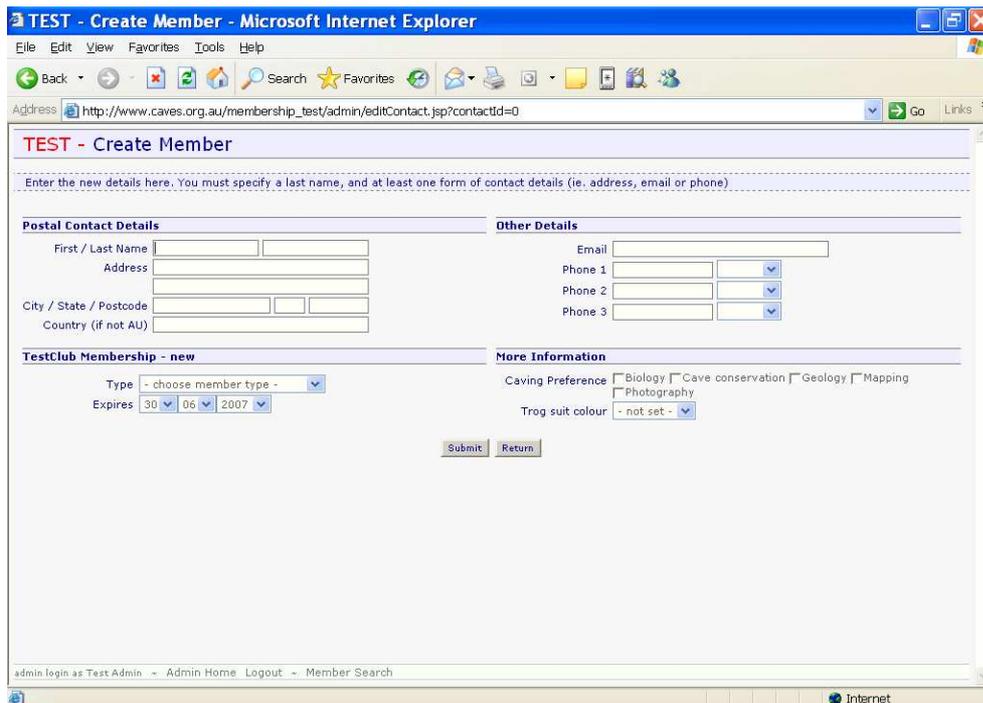
STOP- Have you set up your clubs membership categories yet? If you haven't you need to do this first. This is explained in Lesson 1. Why don't you check by clicking on your Club Details link under the Administration heading? Then click on the "Adjust membership types" to see the categories that have been created. If they have all been added click on the Admin Home on the bottom left to return back to your Admin Home page to continue adding your members. If you still need to complete your membership categories- go back to Lesson 1 and do this first.

Step 2: You will see your Admin Home page set out as in the below example. To add members to your clubs database click on “Create new member”, under the Membership Management area.

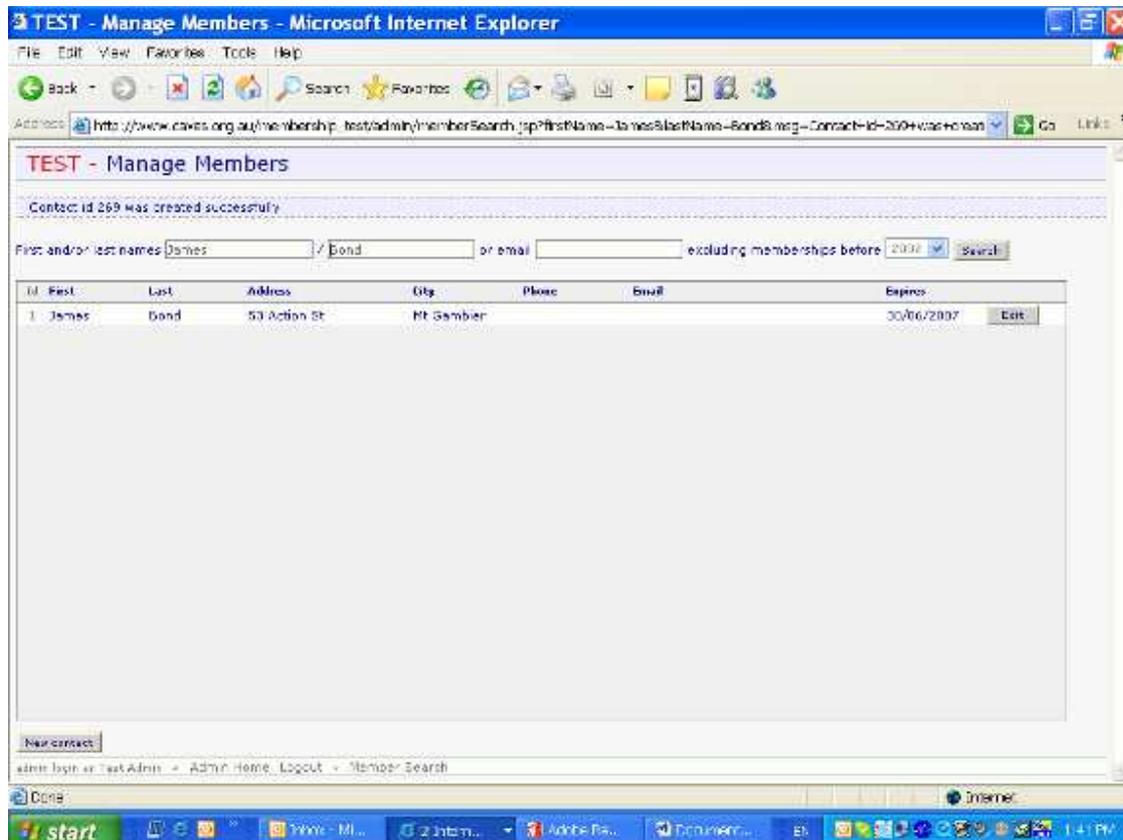


Step 3: Fill in your members' details here (see below).

The Membership type drop down box will have listed the membership categories set up previously by you. You must choose one. The expiry date will be set at by default to your clubs end of membership date, unless you have membership types that are not 12 months long like the ASF Introductory 3 month membership- you need to nominate the start and finish dates manually.



Step 4: Hit Submit. If the person's name already exists in the database the program will alert you. In that case- just read and follow the prompts. In normal circumstances where the member is in the database already the box below will appear.



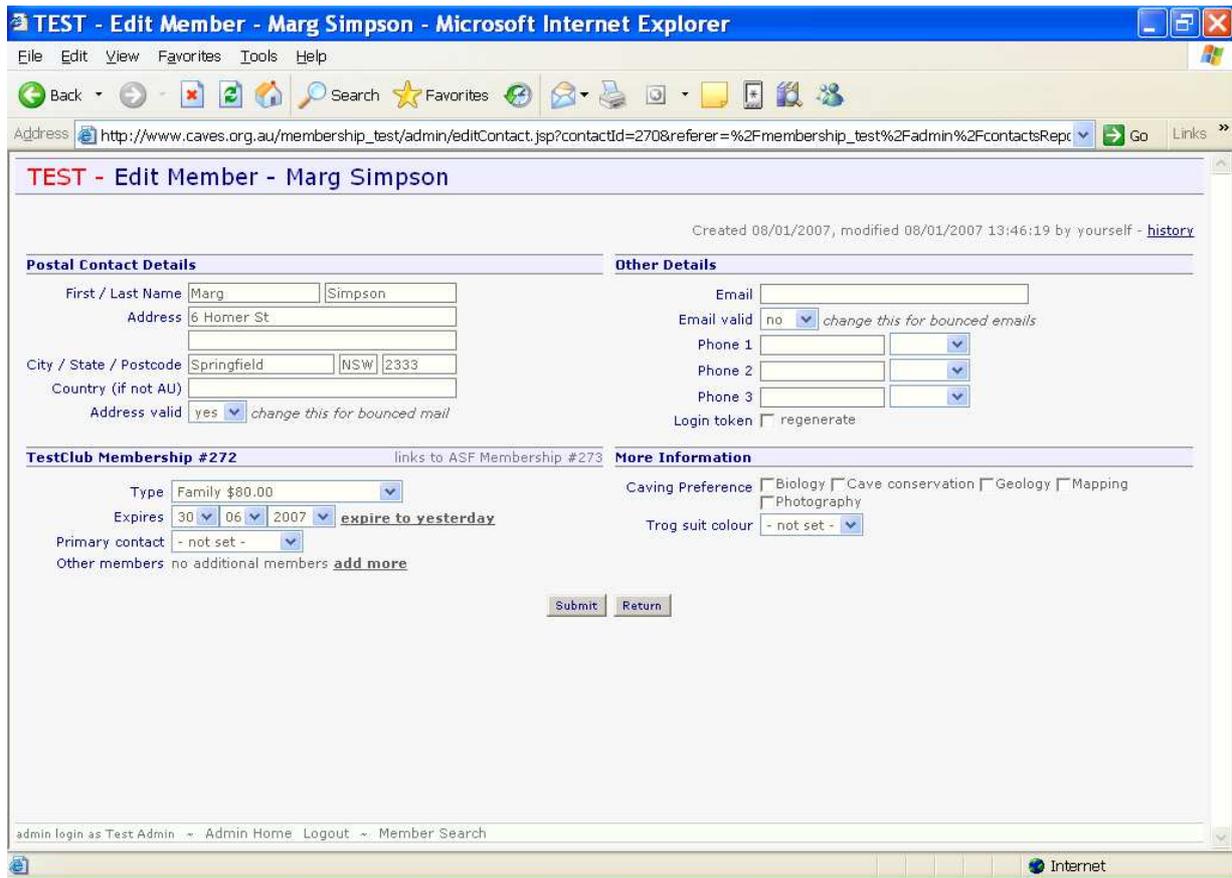
Step 5: If you have more people to add click on New Contact and fill in another on-line form! Easy! But if you have more people to add to a Family membership read on...

Adding Family members

When adding multiple people on the one membership...

Step 1: Its easiest to add the Primary contact person for the family first. Using the "Create new Member" method as detailed above but this time you are choosing a "Group" membership type like a Family. Once submitted you will see the membership displayed with a box on the far right on the same line labeled "Edit".

Step 2: Click on Edit. You will see the data for that member appear again. But this time 2 additional fields will appear. First is "Primary Contact" and second is "Other Members". If these additional lines haven't appeared then you may not have set up your Family membership correctly so it is setup as a "Group" membership type. See the first part of this lesson. If you can see these 2 additional lines then continue...



Step 3: The Primary contact is the person who you choose to receive correspondence from your club and the Caves Australia magazine from ASF.

If the person you have displayed is to be the primary contact then choose their own name in the drop down list. If someone else is to be the primary contact choose that person in the drop down list. But only people already added to this family will appear in the list. You can add more family members first and then go back and select the primary contact later for each person if you like.

Step 4: The database is set up so you can easily add more members to a family without re-typing address's etc. Click on "add more" to add additional family members. And just set the primary contact from the Primary Contact list.

Click the "Also Update..." box so that any future adjustment such as address changes occur throughout the whole family.

Then press submit.

Step 5: After pressing submit you will be taken to the Current members list. But if you have more members of that family to add, no problem, just click on any family member and choose "Add member" again from their data page.