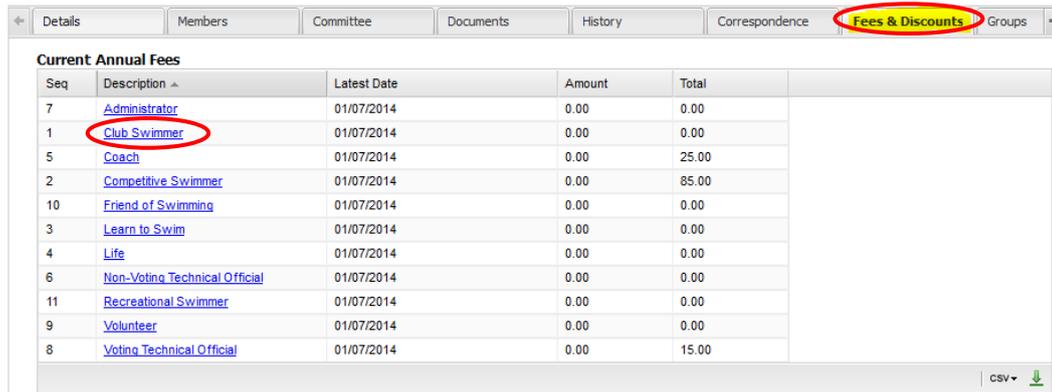# Membership Renewal Process for Clubs.

Set your club membership fees: Before you start the renewal process you must set the membership fees for your different membership type. See the Setting Club Membership Fees in the FINANCE Section

Click on the Fees & Discounts tab in your clubs profile on the database.

1

Then click on any of the membership types that you need to add a membership fee against and edit the following:

1. Click the box for joiner and reinstatement if applicable.
2. Ensure that the payable after date is 01/07/ of the new membership year.
3. Enter in your club fees for that membership type.
4. Click on the recalculate button.
5. Click save at the bottom of the page.

Note: if you have a pro rate payment where it changes throughout the membership year this can be added in this section. Add the start date for the new price to start and create as many of these as you have changes in charges.

2

If a members membership type is changing in the following year you can pre-set what it will change to during the current financial year, to do this you will need to click into the edit button in the subscriptions box on their profile.

The subscriptions screen will now show up where you can edit a member's membership type. Underneath the type for the current year there is a box "Next Year's Settings (year) – only required if different from previous year). Click into this drop down to reveal an option to select the new membership type for the follow year.

Renew your membership: Once you are happy that all of your membership types are complete and accurate it is time to renew your membership.

3

Move to the bottom of the page and click on the "Renewals" button.

Current Annual Fees

Seq	Description ▲	Latest Date	Amount	Total
7	Administrator	01/07/2014	0.00	0.00
1	Club Swimmer	01/07/2014	0.00	0.00
5	Coach	01/07/2014	0.00	25.00
2	Competitive Swimmer	01/07/2014	0.00	90.50
10	Friend of Swimming	01/07/2014	0.00	0.00
3	Learn to Swim	01/07/2014	0.00	0.00
4	Life	01/07/2014	0.00	0.00
6	Non-Voting Technical Official	01/07/2014	0.00	0.00
11	Recreational Swimmer	01/07/2014	0.00	0.00
9	Volunteer	01/07/2014	0.00	0.00
8	Voting Technical Official	01/07/2014	0.00	15.00

CSV ▾

Add

Discount Packages

ℹ No Data Available

Add

Obsolete Annual Fees

ℹ No Data Available

Calculate Subscriptions

Renewals

Recalculate

Start and End Dates

First Renewal   01/07/2014

Last Renewal   30/06/2015

Cancel   Calculate

Once clicking this you will be asked to confirm the period in which you are renewing for. This will automatically be set to the current membership year. If this is correct click on calculate.

Last Run Details

Started on

Please confirm calculation

Back   Calculate

Click to confirm that you want to renew.

The database will then tell you the number of subscriptions that have been calculated.
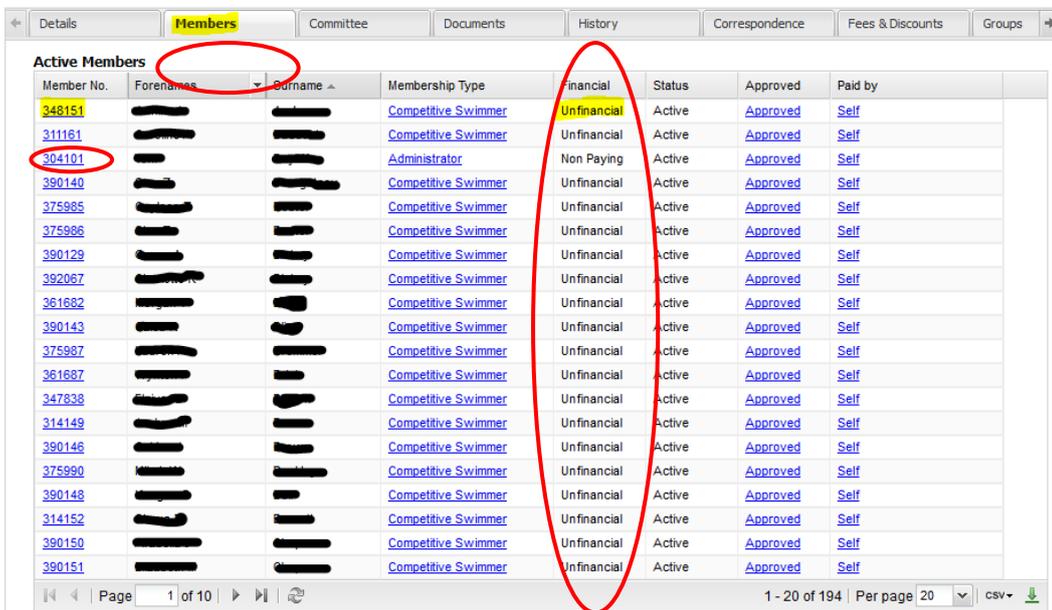
POST 1st JULY

Now that all your members have had their financial status changed to "Un-Financial" you can renew their membership in two ways. You can either manually renew their membership, see steps below or the member can do it online themselves. If your club has opted to do membership renewals via the SNZ Online registration system you will be able to send out an email to all club members providing them with a token to complete their online registration. To do this please refer to "Sending a Membership Renewal Email" under the MEMBERSHIP Section.

MANUAL MEMBERSHIP RENEWAL

Update your members Financial Status: You can now access each members profile and update their financial status through the members tab in your clubs profile. For all members that are not renewing their membership please lapse their profile, to do this please refer to "how do I lapse a member" under the membership section.

4

In the image below you can see that each member Financial status is now un-financial for all paying membership types.

You can now go into the members profile page by clicking on their membership number next to their name in the membership list. This will show you the members profile as you can see below.

Things to note in the below image is that the members profile is displaying that they are unfinancial on the status bar, it displayed the different components of the membership fee based on what you have entered for your club and what has come through from the regional and national fees and you have the ability to pay the membership fees to make the member financial.

You can process a manual payment by clicking on the manual pay button.

You will then see this screen:

Subs details

> Total subscription amount due: 150.00

* Payment method
- ⦿ Cheque
- ○ Cash
- ○ Manual C.Card

* Receipt date   ⓘ   01/07/2014

* Amount paid now   ⓘ   150

[Cancel] [Next]

Ensure that you select the payment method, the date of receipt and if only a part payment indicate the amount that has been paid.

Note that the member will not become financial until the full amount is paid.

Once you have done this click next.

You will then see the below screen:

Payment confirmation

> ⚠ Please check these details carefully, and use the 'Back' button if you need to change them. A total of 150.00 will be applied to the member's record when you click 'Confirm payment'.

Total owing	This payment	Payment method
150.00	150.00	Cheque

* ☐ Please confirm that the member is paying the full amount owing

[Back] [Record payment]

By clicking the check box and pressing the record payment button you are confirming that payment has been received and if the full payment has been made the members profile will then be financial.