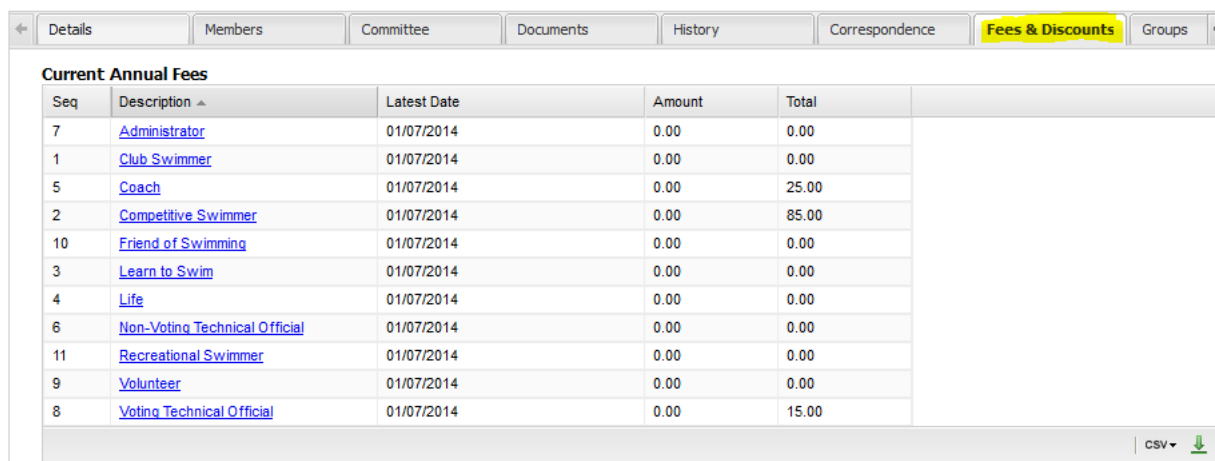


# Membership Renewal Process for Clubs

Please follow the below steps to complete the renewal of your clubs membership.

## 1. Set you club membership fees

Before you start the renewal process you must set the membership fees for your different membership types. Click on the Fees & Discounts tab in your clubs profile on the database.

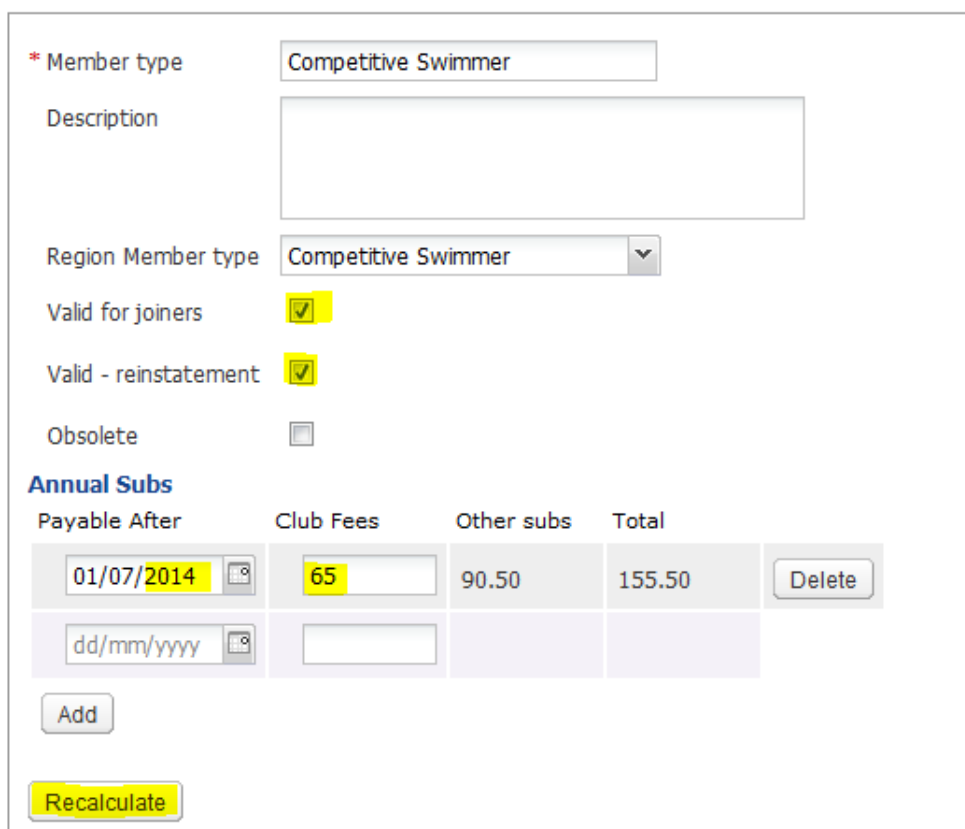


Seq	Description ^	Latest Date	Amount	Total
7	<a href="#">Administrator</a>	01/07/2014	0.00	0.00
1	<a href="#">Club Swimmer</a>	01/07/2014	0.00	0.00
5	<a href="#">Coach</a>	01/07/2014	0.00	25.00
2	<a href="#">Competitive Swimmer</a>	01/07/2014	0.00	85.00
10	<a href="#">Friend of Swimming</a>	01/07/2014	0.00	0.00
3	<a href="#">Learn to Swim</a>	01/07/2014	0.00	0.00
4	<a href="#">Life</a>	01/07/2014	0.00	0.00
6	<a href="#">Non-Voting Technical Official</a>	01/07/2014	0.00	0.00
11	<a href="#">Recreational Swimmer</a>	01/07/2014	0.00	0.00
9	<a href="#">Volunteer</a>	01/07/2014	0.00	0.00
8	<a href="#">Voting Technical Official</a>	01/07/2014	0.00	15.00

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 a joiner and reinstatement
2. Ensure that the payable after date is 01/07/2014
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

## Annual Fee



\* Member type: Competitive Swimmer

Description:

Region Member type: Competitive Swimmer

Valid for joiners:

Valid - reinstatement:

Obsolete:

### Annual Subs

Payable After	Club Fees	Other subs	Total
01/07/2014	65	90.50	155.50
dd/mm/yyyy			

Add

**Recalculate**


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

## 2. Renew your membership

Once you are happy that all of your membership types are complete and accurate it is time to renew your membership. Move to the bottom of the page and click on the “Renewals” button.


### Current Annual Fees

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

CSV ▼ 


Add

### Discount Packages

 No Data Available

Add

### Obsolete Annual Fees

 No Data Available

### Calculate Subscriptions

Renewals

Recalculate

On 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. Note that you should only click on the renewals once for each membership year.

## Start and End Dates

First Renewal	01/07/2014
Last Renewal	30/06/2015

## Last Run Details

Started on  
Started at  
Started by  
Number of members

Click to confirm that you want to renew.

## Please confirm calculation

The database will then tell you the number of subscriptions that have been calculated.

### 3. Update you members Financial Status

You can now access each members profile and update their financial status through the members tab in your clubs profile. In the image below you can see that each member Financial status is now un-financial for all paying membership types.

Member No.	Forenames	Surname	Membership Type	Financial	Status	Approved	Paid by
348151			Competitive Swimmer	Unfinancial	Active	Approved	Self
311161			Competitive Swimmer	Unfinancial	Active	Approved	Self
304101			Administrator	Non Paying	Active	Approved	Self
390140			Competitive Swimmer	Unfinancial	Active	Approved	Self
375985			Competitive Swimmer	Unfinancial	Active	Approved	Self
375986			Competitive Swimmer	Unfinancial	Active	Approved	Self
390129			Competitive Swimmer	Unfinancial	Active	Approved	Self
392067			Competitive Swimmer	Unfinancial	Active	Approved	Self
361682			Competitive Swimmer	Unfinancial	Active	Approved	Self
390143			Competitive Swimmer	Unfinancial	Active	Approved	Self
375987			Competitive Swimmer	Unfinancial	Active	Approved	Self
361687			Competitive Swimmer	Unfinancial	Active	Approved	Self
347838			Competitive Swimmer	Unfinancial	Active	Approved	Self
314149			Competitive Swimmer	Unfinancial	Active	Approved	Self
390146			Competitive Swimmer	Unfinancial	Active	Approved	Self
375990			Competitive Swimmer	Unfinancial	Active	Approved	Self
390148			Competitive Swimmer	Unfinancial	Active	Approved	Self
314152			Competitive Swimmer	Unfinancial	Active	Approved	Self
390150			Competitive Swimmer	Unfinancial	Active	Approved	Self
390151			Competitive Swimmer	Unfinancial	Active	Approved	Self

There are two parts to making the members financial status “financial”. First the individuals member type for the new period needs to be confirmed. If the membership type next to the members name is incorrect and needs to be adjusted click on the membership type next to the individuals name. That will show you the below screen:

**Subscriptions**

* Type 2014	Competitive Swimmer
* Pay Method 2014	Cheque / Cash
Type 2015	
Pay Method 2015	
Renewal date	01/07/2015
* Effective date	01/07/2014
Paid By	

Cancel Save

In here you should confirm the following:

- 2014 Membership type
- 2014 Payment method
- Effective date – this will default to the date of the day you are processing the membership, this can be backdated to the actual date given that this year’s roll over has been delayed.

Click save twice and return to the membership list.

Once you have all of the members listed with their correct membership types it is time to process their membership fee payments. 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 displays 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.

Mailname	Membership Type	Membership Number	Meet Manager	Date of Birth	Age	Join date	Indicator	Approved Status
[Redacted]	Competitive Swimmer	381522	[Redacted]	[Redacted]	[Redacted]	27/09/2012	Unfinancial	Approved

**This person**

[Redacted] (381522)

[Add to Basket](#) [Personal details](#)  
[Add to Card run](#)

**Meet Manager**

Meet Manager [Redacted]

[Edit](#)

**Status**

✔ Record 381522 is currently active

[Lapse](#)

**Contacts**

Type: Personal  
Email addresses: [Redacted]

[Log received email](#) [Send quick email](#)

Type: Mobile  
Telephone: [Redacted]

[Log incoming call](#) [Log outgoing call](#)

[Edit contact details](#)

**Web Access**

Web User Id: [Not set]  
Password: [Not set]

[Edit](#)

**Approved Member Status**

Approved

[Edit](#)

**Personal Address**

Address: [Redacted]  
Post Code: [Redacted]

[Edit](#)

**Club**

[Redacted]

[Select](#)

**Subscriptions**

Description	Value
Club subscriptions	65.00
Region / National	85.00
<b>Total</b>	<b>150.00</b>

Subs due today: 150.00  
Total due: 150.00  
Discount: 0.00  
Discounted Amount: 150.00

[Manual pay](#) [Pay Now](#) [Transactions](#) [Edit](#)  
[Send Payment Email](#)

**Region**

[Redacted] (code: [Redacted])  
(normally derived from Club)

[Edit](#)

**Medical Information**

[Edit](#)

There currently isn't the ability to "Pay Now" that is a card payment but you can process a manual payment which could be a cash or cheque payment for the members that you have already received membership fees from. Click on manual pay to do this.

You will then see this screen.

## Subs details

**Total subscription amount due: 150.00**

\* Payment method  Cheque  
 Cash  
 Manual C.Card

\* Receipt date

\* Amount paid now

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

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.

## Errors with membership fees due.

If you find that you have given a member an incorrect membership type or that the subscription owing appears to be incorrect do the following.


1. Click on edit in the subscriptions box and ensure that their membership type is correct
2. Go to the fees and discounts tab on your clubs profile (see next page) and click on the 'Recalculate' tab. Check that this has corrected your error. If it doesn't contact Swimming New Zealand.

**Current Annual Fees**

Seq	Description ▲	Latest Date	Amount	Total	
7	<a href="#">Administrator</a>	01/07/2014	0.00	0.00	
1	<a href="#">Club Swimmer</a>	01/07/2014		0.00	
5	<a href="#">Coach</a>	01/07/2014	0.00	25.00	
2	<a href="#">Competitive Swimmer</a>	01/07/2014		92.00	
10	<a href="#">Friend of Swimming</a>	01/07/2014	0.00	0.00	
3	<a href="#">Learn to Swim</a>	01/07/2014	0.00	0.00	
4	<a href="#">Life</a>	01/07/2014	0.00	0.00	
6	<a href="#">Non-Voting Technical Official</a>	01/07/2014	0.00	0.00	
11	<a href="#">Recreational Swimmer</a>	01/07/2014	0.00	0.00	
9	<a href="#">Volunteer</a>	01/07/2014	0.00	0.00	
8	<a href="#">Voting Technical Official</a>	01/07/2014	0.00	15.00	


Add

**Discount Packages**

 No Data Available

Add

**Obsolete Annual Fees**

 No Data Available

**Calculate Subscriptions**