



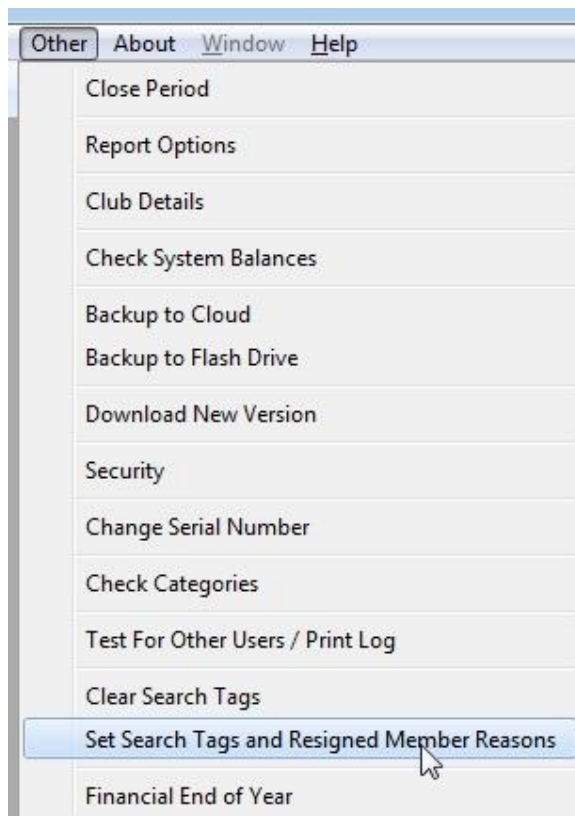
Membership Software for Clubs

Covid Vaccination Record

Set Search Tags:

We can use the existing search tag function to collect and store information about members vaccine status.

Main>Other>"Set Search Tags and Resigned Member Reasons"



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You just type in to create a new search tag in Membership Details.

Have setup a few of these with clubs already and on reflection I think 3 tags as below will cover all bases.

If you have already used the number one spot which I have set as unvaccinated, give me a bell as we can clear it out.

Using number one then enables us to globally set all members as no vaccine until you see the covid passports. Call me to set this up

Club Details

Name: Club Manager Ltd

Membership Details - Search Tags

- Unvaccinated
-
-
-
-
- Vaccinated
- Vaccine Booster
-
-
-
-
-
-
-
-

Membership Details - More Info

-
-
-
-
-
-
-
-
-
-
-
-
-
-

Resigned Reasons

- Category Resigned by System
- Lapsed
- Moved
- Not Playing
- Financial
- Health
- Deceased
- Joined Other Club
- Dissatisfied
- No Reason Given
- Subs Increase

Set Search Tag 1 on

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Using the Search Tag:

In Membership Details find the member and then click on the Search Tag tab pane.

Membership Details ...

Alpha Code: ELLI Gender: N/a Male Female Notes: Partner: 1236 Partner

Member No: 1234 Surname: ELLIS First Name: Craig Mail Prefix: Contact: CONTACT

Standing Charges: Address & Phone Search Tags Contacts Notes House Family & Entrance Fees

Code	Description	Reference	Rate
2	CONTACT		

Email Subs/House
 Don't Print Subs
 Don't Change Sub Amount
 Non Financial
 No Bulk Email
 Paying by Installment
 Golf Rewards
 9 Hole Handicap
 Don't Export for Slope

Subs Balance: 345.00 Ledger Activity

Add Edit Delete Generate Subscription Email Subs Print Subs Sundry Invoice Record Payment

Automatic Payments: Amount, Next Due, Last Due, Frequency (Monthly, Fortnightly, Weekly)

Direct Debit Payments: Amount, Next Due, Last Due, DD Bank No., Frequency (Monthly, Quarterly, Bi Monthly, Weekly, Six Monthly, Subs Balance)

Cycle Billing: Next Due, Frequency (Annually, Quarterly, Six Monthly, Monthly, 4 Monthly), Debentures, IRD No., Tax Rate

Expiry Date

Buttons: Delete, Resign, Search, Email, Print Letter, Print Label, Cat History, Comms List, Save F7, Cancel F8, Close F9

Click Edit on the right hand side and set the check box

Membership Details ...

Alpha Code: ELLI Gender: N/a Male Female Notes: Partner: 1236 Partner

Member No: 1234 Surname: ELLIS First Name: Craig Mail Prefix: Contact: CONTACT

Standing Charges: Address & Phone Search Tags Contacts Notes House Family & Entrance Fees

Unvaccinated Yuccinated
Yuccine Booster

Type: Tag Selection:

Buttons: Delete, Resign, Search, Email, Print Letter, Print Label, Cat History, Comms List, Save F7, Cancel F8, Close F9

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To find Members Status:

In Membership Details click on the Search Button on the right hand side

The screenshot shows the 'Membership Details' window. At the top, there are fields for Alpha Code (ELLI), Member No. (1234), Surname (ELLIS), First Name (Craig), and Contact (CONTACT). There are also radio buttons for Gender (N/a, Male, Female) and a Partner field (1236). A 'Notes' field is on the right. Below this is a table with columns: Code, Description, Reference, and Rate. The table contains one entry with Code '2' and Description 'CONTACT'. To the right of the table are various checkboxes for options like 'Email Subs/House', 'Don't Print Subs', 'No Bulk Email', etc. Below the table are buttons for 'Add', 'Edit', 'Delete', 'Generate Subscription', 'Email Subs', 'Print Subs', 'Sundry Invoice', 'Record Payment', 'Ledge Activity', and 'Delete'. At the bottom, there are sections for 'Automatic Payments', 'Direct Debit Payments', and 'Cycle Billing' with various input fields and radio buttons for frequency and terms.

Click on Search, Select the tag you want and then the green tick
You can then print a list or send an email to members using the buttons below

The screenshot shows the 'Search' window. It has a search criteria field at the top with the text 'ELLI Craig ELLIS PO BOX 6042 TRURONGA'. On the right, there are 'Search By' and 'Select By' dropdown menus. The 'Search By' menu is set to 'All Fields' and 'Name'. The 'Select By' menu is set to 'All Members'. Below these are various filters for 'Member Type', 'Categories', 'Include Sub Categories', 'Joined From', 'To', 'DOB From', 'To', 'Cycle Bill From', 'To', 'Birthday Month', and 'August = 8'. There are also checkboxes for 'Unvaccinated', 'Vaccinated', and 'Vaccine Booster'. At the bottom, there is a toolbar with buttons for 'Print List', 'Email List', 'HC Index List', 'Password', 'Email Export', 'Clear Selection', 'Merge File', 'Attach Files', 'Clear Files', 'Send Bulk Emails', 'Print Labels', 'HC/Age List', 'Print Letters', and 'Print Names'.

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