

### **Process Members Batch Screen**

Process Member Batch is used to approve membership applications. Membership applications are stored in batches until the venue is ready to review the batch of applications. There is always an open batch, which is automatically opened when the previous batch is closed by the user. All members added through Add New Member are stored in a batch until the batch is closed.

To open the Batch screen, select **Process > Process Member Batch** from the Members sidebar menu or from the top Members menu.

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The window has two sections,

- On the right is a list of all batches.
- The left will show a list of members within the highlighted batch.

There are also two tabs on the right hand section,

- **Batch** shows the list of all batches.
- **Details** shows the details of the member highlighted on the left.



### **Close Batch for Board Approval**

Complete the following steps when you need to report new members to the Board and Existing Members for approval.

Check Members Detail and Complete Batch.

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- 1. Go to Member > Process > Process Member Batch.
- 2. Click the **Batch** to view all new members in the batch.
- 3. Click the *grid view icon* on the top task bar and review the list for incomplete data.
- 4. Click *make changes to record icon* complete data where required.
- If all member details are correct all members can be set to complete by clicking complete in the status box then click the green tick, this will change all members to green in the list.
- 6. If you have members that:
  - Should be in the next month's batch then leave them as *Incomplete* and that member will be moved to the next batch when you close the current batch.
  - Do not have to be reported to the board (e.g. staff), set the members status to Held.
     This will leave the members in the batch, but when generating the reports if you use the
     EXCLUDE HELD MEMEBERS option, these members will not be reported on.
- 7. Click the *Close Batch* icon, this will automatically open a new batch.

**NOTE:** Any new members added into the system will now be added into the newly opened batch for the next board meeting.



### **Print Reports of New Members**

- 1. Go to Member > Process > Process Member Batch.
- 2. Highlight the closed batch to report on and click the *Reports* icon



3. Select the report that you want to print, check that the correct batch is highlighted and click the **Preview or Print** icon.

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Members		Reports		
Process				
Process Member Batch	Select Report Group Batch Reports Citation Reports Deleted Members	Board Report		
× *	Gaming Reports Log Reports	Select Batch		
Set Unfinancial Flag	Mailing Labels	Batch # Opened Closed Transferred		
<b>**</b>	Marketing Reports Membership Registry Reports Membership Summary Reports	3 21/05/2016 2 21/05/2016 21/05/2016		
Delete Unfinancial Members	Miscellaneous Reports Self Exclusion Reports	1 21/05/2016 21/05/2016		
	Sub-Club Reports			
Process Direct Debits	Coloridorea			
	Select Report Address Register Badge, Name Report Batch Report Board Report	Held Members		
	Name Only Report	Sort By		
		Type, Badge     Type, Name		
		( Type, Name		
		Include		
		Proposer and Seconder		
		Setup Print Preview		
		Type of Report A4 Landscape		
		Report to Printer: iR-ADV C7260		

#### Sample Reports to Print

- The *Board Report* would usually be printed to go to the next board meeting.
- The *Name Only* report can be printed to be displayed on a notice board for existing member's information.

**NOTE:** If the data required on the report templates is different to the data the board requires, an export layout can be created for reports.



### **Transfer Members after board approval**

Transfer Members in Batch to Full Financial Members

1. Go to Member > Process > Process Member Batch.

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<b>1</b>	11/8 TEN MEMBER Miss Female 11/8 TEN MEMBER Mr Male 11/69	
	1189 FIFTEEN MEMBER Mr Male Miss Member Three	
Set Unfinancial Flag		
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Delete Unfinancial Members	📄 🌄 1yr 🎖 少 🖾	
5	Batch # Opened Closed Transferred	Legend
	4 30/05/2016 3 21/05/2016 30/05/2016	Held
Process Direct Debits	2 2 21/05/2016 21/05/2016	Incomplete
	1 21/05/2016 21/05/2016	Complete
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		Held 0
		Incomplete 0
		Complete 5
Maintain		
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- 2. Highlight the batch that has been approved.
- 3. If a member **HAS NOT** been approved you can click the *Held* option in the **Details TAB** and a card will not be printed for this member. (If print card option is selected)

Batch <u>D</u> etails	
Badge Number 1189 🧭	Status Held C Incomplete C Complete
Title First Names	Surname
Mr MEMBER	FIFTEEN
Preferred Name	Gender Date Of Birth
MEMBER	Male 🔽 10/10/1955 📅

If all members have been approved by the board, click the *Transfer* icon.
 A confirmation box will appear – selecting YES will remove the Pending flag from all members in the batch and their card will become fully functional.

The system will then ask if you want to print membership cards for these members.

- If members received their cards on joining then select **NO**, and the pending Status will be removed from member's details.
- If members have to wait for Board approval to receive their card then click **YES** to print cards for members.



### **Printing Cards for Members after Board Approval**

After selecting the **Transfer** icon to transfer members to remove PENDING status, click YES to the below message.

	Transfer		
	Print and encode ca	rds for batch?	
	Yes	No	
Card Production	1		
Select Membership Catego	ry to Print <all rates=""></all>		
Process in Badge/Card Or	der 🔍 🤉	4	
Process in Category Order	<u>ئ</u> ا ،		X
Start From Badge No.		1	
Process as Provisional <b>3</b>	Expiry Date 30/6/16	12	31
Current Member Being Pro	cessed		
Badge 1169			
Name THREE MEMB	ER	-	
		# Process	ed 0
Badge Surname	First Name	New Card No	Status
1169 THREE	MEMBER	372=001169	Pending
1170 FOUR	MEMBER	372=001170	Pending
1178 TEN	MEMBER	372=001178 372=001184	Pending Pending
1184 ELEVEN			

- 1. You can choose the category or rate
  - To print cards only for a select rate only e.g. Gold Members
  - Or print cards for all rates.
- 2. Select to the option to either
  - Process in badge / Card Order.
  - Process in category order.
- 3. If you want to print provisional cards click the box next to Process as provisional and enter an expiry date. A provisional card is a temporary membership card that will usually expire 30 days after the card was first made.
- 4. Click the Green Tick to start the print process.

**NB** Once the batch has been transferred held members (directors / staff that did not need to go to Board Approval) will have to be un-ticked 'Pending board approval' in Member Details > Financial.