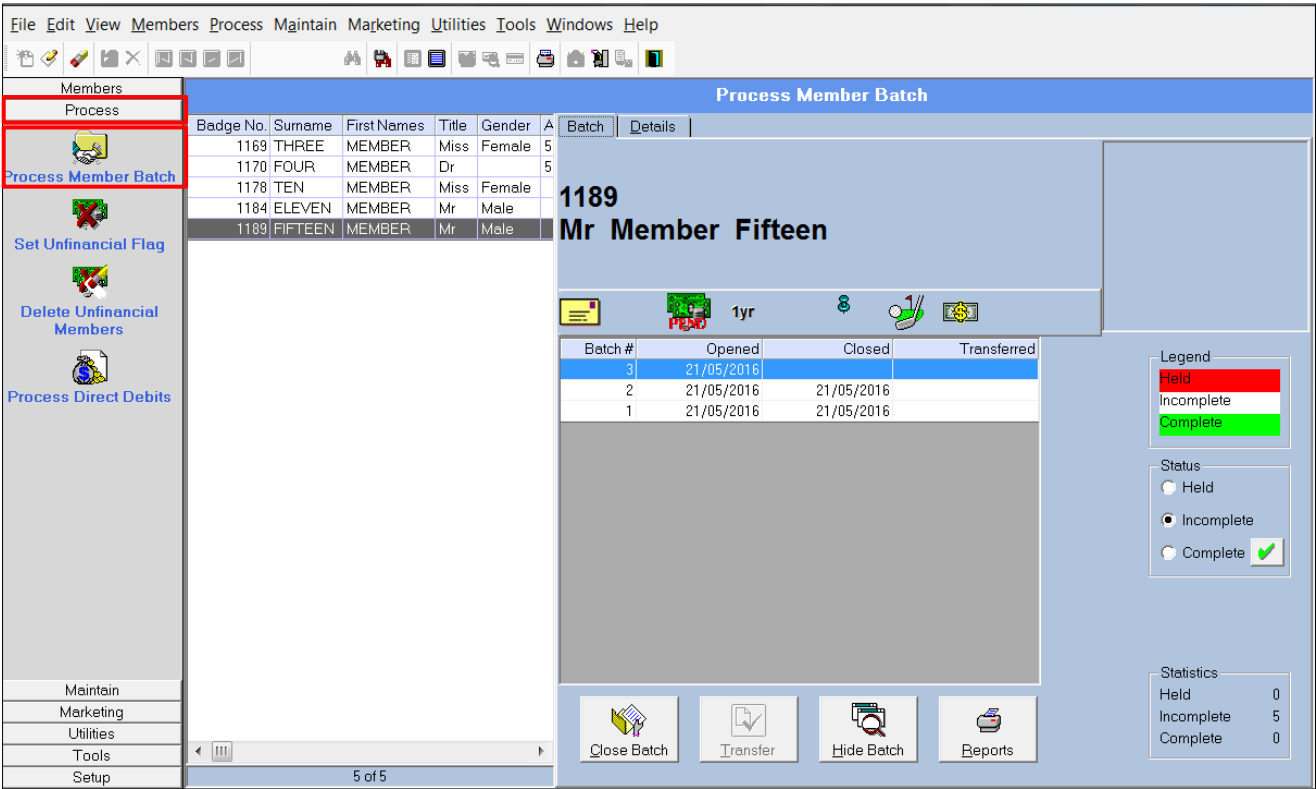


MEMBER: Managing Batches

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.



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,

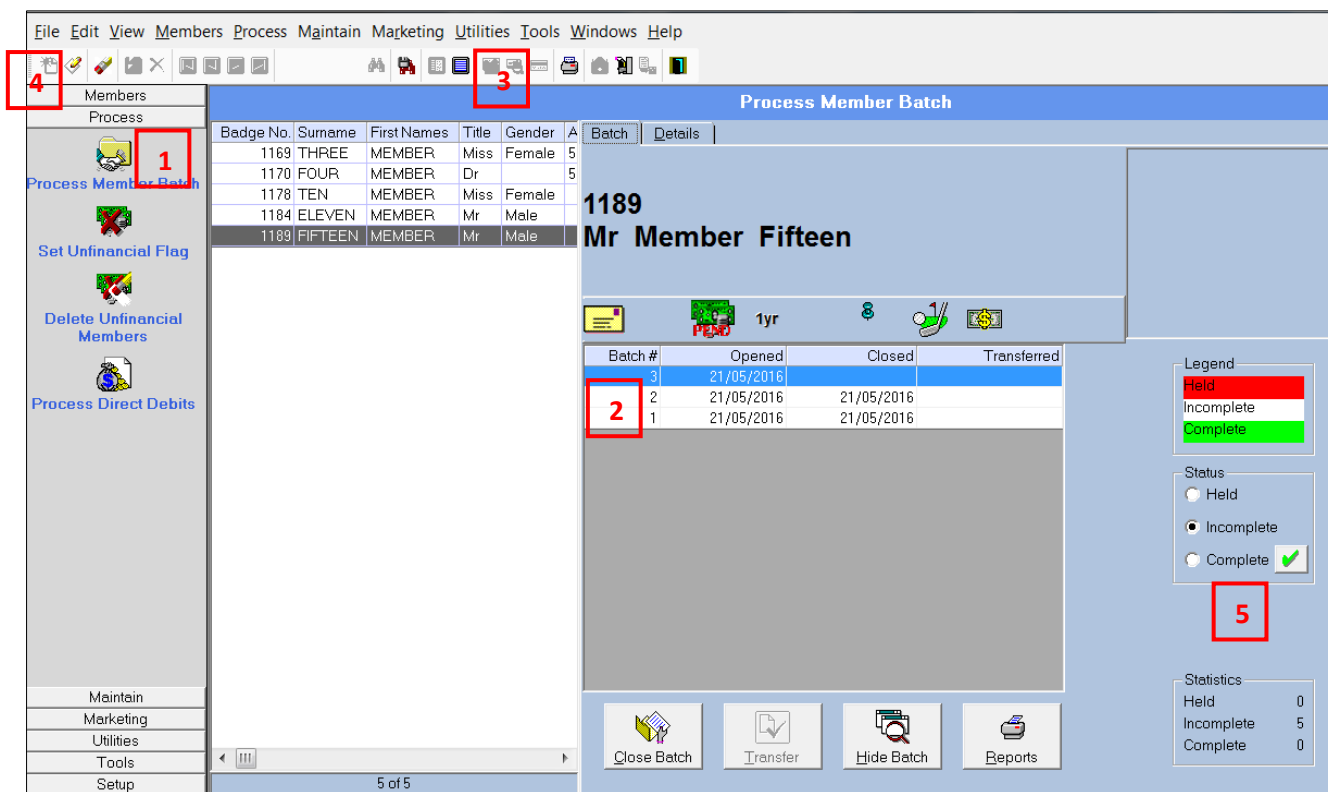
- **Batch** shows the list of all batches.
- **Details** shows the details of the member highlighted on the left.

MEMBER: Managing Batches

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.



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.
5. 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.

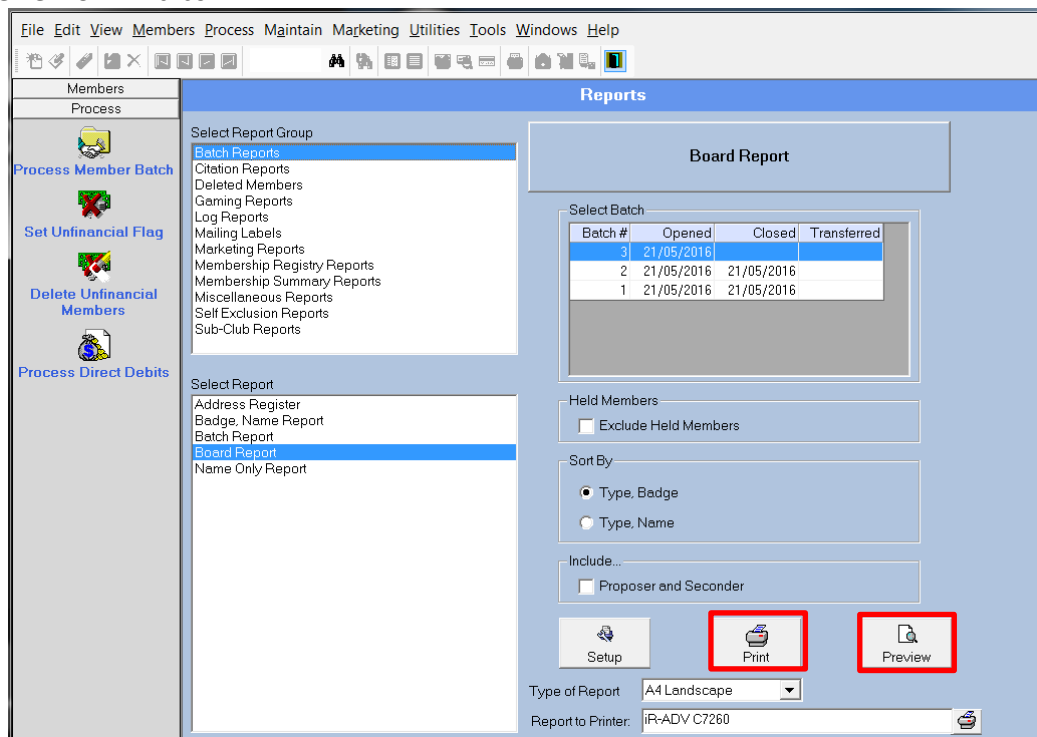
NOTE: Any new members added into the system will now be added into the newly opened batch for the next board meeting.

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.



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.

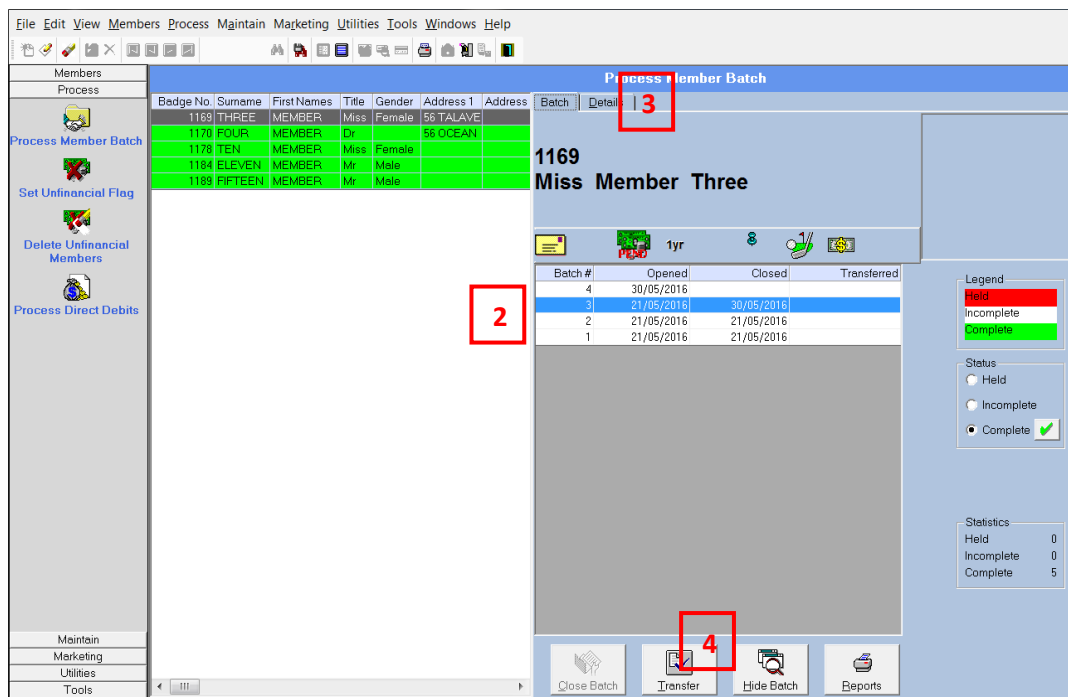
NOTE: If the data required on the report templates is different to the data the board requires, an export layout can be created for reports.

MEMBER: Managing Batches

Transfer Members after board approval

Transfer Members in Batch to Full Financial Members

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



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 Details

Badge Number: 1189

Title: Mr First Names: MEMBER Surname: FIFTEEN

Preferred Name: MEMBER Gender: Male Date Of Birth: 10/10/1955

Status: ☒ Held ☐ Incomplete ☐ Complete

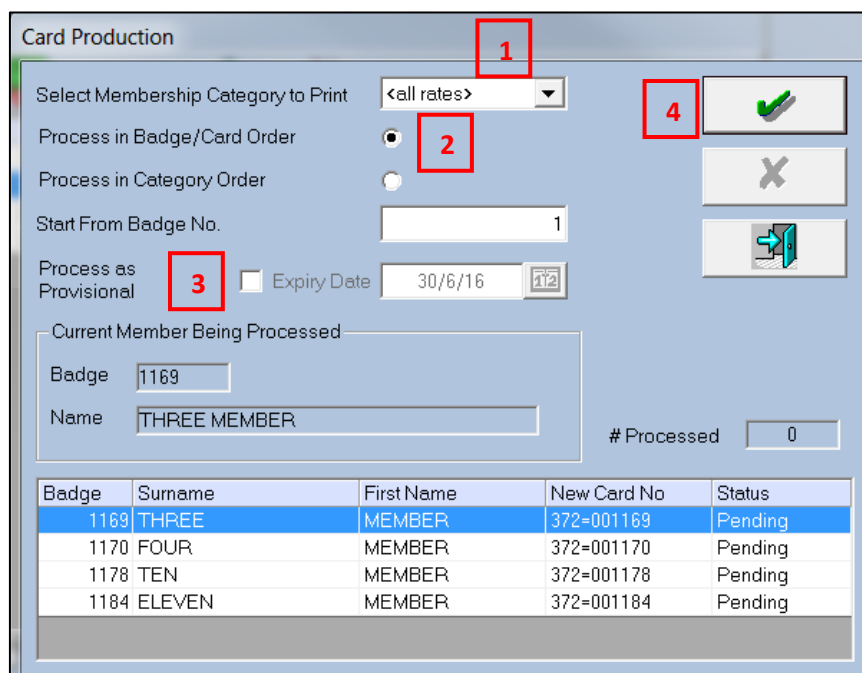
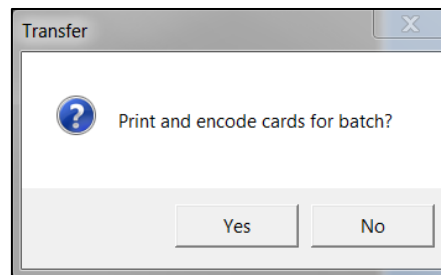
4. If all members have been approved by the board, click the **Transfer** icon.
A confirmation box will appear – selecting YES will remove the Pending flag from all members in the batch and their card will become fully functional.


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.

A screenshot of the "Card Production" window. It contains several fields and buttons. A dropdown menu for "Select Membership Category to Print" is labeled with a red box and the number 1. Two radio buttons for "Process in Badge/Card Order" and "Process in Category Order" are labeled with a red box and the number 2. A checkbox for "Process as Provisional" is labeled with a red box and the number 3. An "Expiry Date" field is set to "30/6/16". A "Current Member Being Processed" section shows "Badge: 1169" and "Name: THREE MEMBER". A "# Processed" counter shows "0". On the right, there are three buttons: a green checkmark (labeled with a red box and the number 4), a red X, and a blue arrow. Below these is a table with 5 columns: Badge, Surname, First Name, New Card No, and Status.

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.