

FAQ | Membership Administration

Create a New Member

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1. In the main menu, click on “New”. The window “Add Customer” will appear. Enter as many customer data as possible, then click “Next”.

The screenshot shows the 'Add Customer: Assoc info' window. It is divided into several sections:

- Personal:** Fields for Customer Type (dropdown), Number, Name, First name, Birthday (dropdown), Age (text), Gender (dropdown), Title (dropdown), Name extra, Address, Letter Address, and Nationality (dropdown).
- Club:** Fields for Club, Age Group, Homeclub (dropdown), Local club (dropdown), Entry date (dropdown), Exit Date (text), Membership Valid Date (dropdown), Block Date (text), Share (checkbox), and Play rights (dropdown).
- ID - Number:** Fields for ID (0049), Number (000000), and another Number field (000000000).
- Exact HCP:** A dropdown menu.
- Calc Handicap:** A checkbox.
- Active handicap:** A checkbox.

 At the bottom, there are four buttons: '<< Previous', 'Next >>', 'Finish', and 'Cancel'. The 'Next >>' button is highlighted with a red box.

2. In the next window, there are no mandatory fields - you can skip this page and click on “Next”.

The screenshot shows the 'Add Customer: Additional' window. It contains the following sections:

- Card Order:** A checkbox and a dropdown menu for Function (set to 'without function').
- Additional Security:** Fields for Security (dropdown), Password, Comment, Birthplace, Occupation (dropdown), and Licence.
- Online:** Fields for AWS Name (text), AWS Password, and AWS from (dropdown) with a date picker, and AWS Until (dropdown) with a date picker.

 At the bottom, there are four buttons: '<< Previous', 'Next >>', 'Finish', and 'Cancel'. The 'Next >>' button is highlighted with a red box.

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3. In the window “Contacts“, you can capture personal and / or business address data. Afterwards, click on “Next”.

The screenshot shows the 'Add Customer: Contacts' window. It is divided into two sections: 'Personal' and 'Business'. Both sections have identical fields for Street, Street2, Country (SA), Postal code (7100), Tel, Fax, Cell, Email, and Homepage. The 'Personal' section has a 'SMS' checkbox and a 'Provider' dropdown menu. The 'Business' section has a 'SMS' checkbox checked and a 'Provider' dropdown menu. The 'Next >>' button is highlighted with a red box.

4. In the window “Banks“, the details of the bank account from which the fees are debited, can be entered. Then, click on “Next”.

The screenshot shows the 'Add Customer: Banks' window. It contains the following fields: Bank mandatory (Club), Owner (Soap, Joe), Account no, Bank code, Bank name, IBAN Code, Auto payment (checkbox), Since, and Auto paym. until. The 'Next >>' button is highlighted with a red box.

5. In the last window, you might add a picture for this member. Then click on “Finish” – this will take you back to the main page which displays all members. The recently added member will be highlighted.