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FAQ | Membership Administration

Change a Member's Customer Type

1.	Select the correct	member and clic	k on "Edit".							
	í.	💓 Members - Custo	mers							
		File Edit Commu	unication Accour	nting Handicap	Extra	as Help				
			♣ 🖢 📗 🖪) + 🖉 🞯		X	🆀 🍫 🛛 🛓	5 • 🛛 👰	🌺 🕺 🄇) - 🗣
		Customer number 3 Name So	Members	- Full Male Mem			Home club South A Age group Men	Ifrica Demo Clu	ib Test Database	
		First name Jo Customers Details	e Contacts Family gr	ouping/labels	kers	Banks S	ubs / Fees Accou	nts Reminder	rs Memos Actio	ons Handi
		Cust_Type	Sub type	Number V	<u> </u>	Surname		name	Age group	Нср
		Members	Full Male Member			Soap	Joe		Men	0
2.	1	Customer number 3 Name Soap	Members - Full Male	_	Home		Africa Demo Club Test			
	с	First name Joe Sustomers Details Contac Personal details	ts Family grouping/Lab	els Lockers Banks	Subs /	Fees Acco	ounts Reminders Me	mos Actions I	Handicap Competiti	ons AlbEve
	c	Customer type Men	nbers - Full Male Member No type ***							<u> </u>
			bers - Full Female Memb bers - Full Male Member	er						
3.	ATTENTION! Depe Programs, Albatros will be changed im you decide to char order to activate y	s Tools) under "C imediately or a n nge settings in th	Club Parameter otification win	rs", "Custome idow will requ	rs" <i>, '</i> iire y	"MemT ou to e	ype change r enter a reasor	eason"), th for the ch	he customer hange. In cas t administrat	e that
				File		.				
				Gene	ral Paramete Parameters		Synchronize AssocNo			
				€ L Ø L ● F	icense club .ocal settings Handicap Courses		Confirmation of HdcSheet en Cock names Show anti-doping information Confirm changing of CustNo is		s another counter	
					Authorized Cli Customers	ubs	🐼 Ask For Account Number Afte			
					Bookings Withdrawal Smiles		MemType change reason C Never ask C Optionally explain a reason			
				T 🚱	Thumbs naments		 Mandatory explain a reason Membership end notification 			
				Acco	unting syster ise Informatic	n 💰	Notify user before membership er User	d in 7 day	γs •	
				AWS	ration Interfa	ces (8) (8) (8)	Newsletter Default newsletter status	Unsubsc	ribed	
				Interfa						
				Print POS I	^P arameters P Global Paran	OS 💰 neters 💰				
					Reservation Support Fun					



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		2 [
	Specify the reason for the change, enter the on "OK" to save the changes.	date, and click Enter the reason to change customer type							
	on ok to save the changes.	Reason Any Reason							
		Date 2012/01/01 💌							
		<u>√ O</u> k X Cancel							
	You might be asked if you want to adapt the membership number to the number	Confirm							
	range of the new customer subtype.	The selected customer subtype uses another range of customer numbers. Do you want to change the customer number according to the new subtype?							
	Choose "Yes" or "No".	Yes No Cancel							
5.	Click on the green "Save" icon to complete th	File Edit Communication Accounting Handicap Extras Help							
5.	A new window will appear. Next you have to confirm that all subscriptions belonging to the old member type can b deactivated and new default subscriptions can be assigned. Make sure both check boxes are marked and click on "Perform".								
		Member type was changed							
		Old type Mitglied - ord							
		New type Ehemalige - ehem.							
		Deactivate subscriptions belonging to the old member type							
		Deactivate other existing subscriptions							

F Assign default subscriptions for the new member type

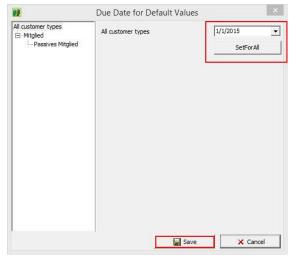
V Perform



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6. Next, you need to set the default due date on the subscriptions. Select the date, click on "Set for All" and click on "Save".



7. You are now prompted to overwrite the individual fees from the old, irrelevant customer type. Click "Yes" to assign the new subscription fees. The correct customer type will now reflect on the member's information screen.

Confirm				
?	Customer debit for the article 'Affiliation Fee' already exists. Overwrite it?			
	Yes No Cancel			

8. The correct customer type will now be displayed in the section "Customers".