

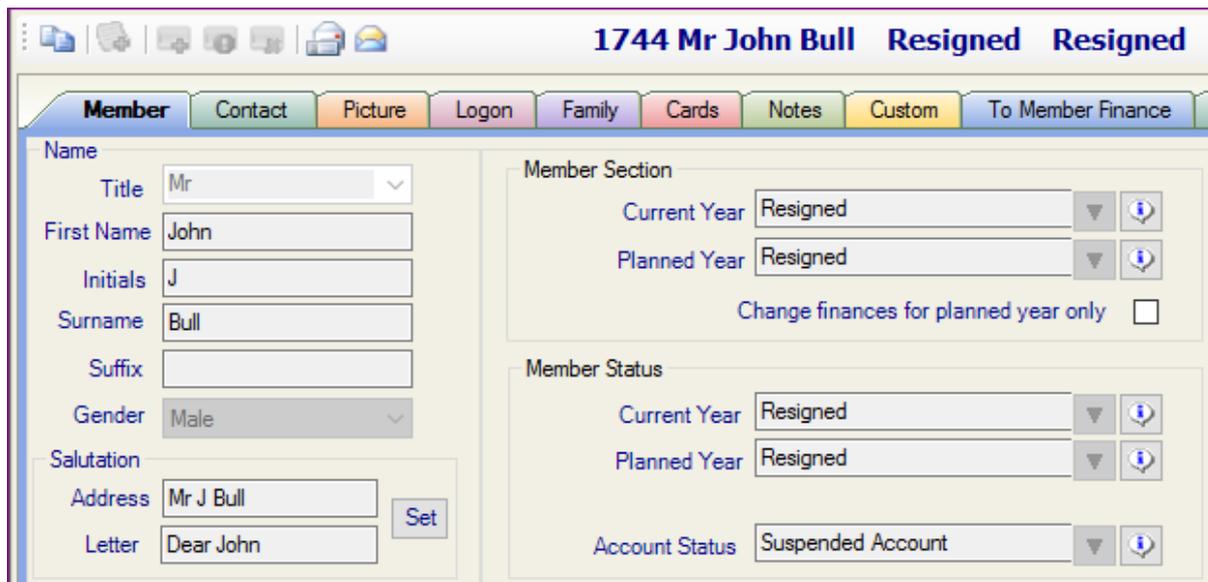
ClubMinder.net - Guide on setting a member to a non-current category and status

When a member changes category, one key consideration is how this will affect his status in all other linked systems (such as the CLUBView website, and HandicapMaster.) Making sure you set the member record correctly will reduce unexpected results elsewhere; for example, when bulk emailing from the website.

Setting the Member Status correctly to an appropriate non-current setting (such as Resigned, Deceased, etc.) will make sure that the record is hidden or removed from mailing functions in the website. This is important, to prevent for example deceased members from being emailed. The setting of the category alone is not enough to guarantee the exclusion from mailings.

The Rule-of-thumb

When a member is changed to a non-current category, you should also change his Member Status to a non-current status:



The screenshot shows the ClubMinder.net interface for member 1744 Mr John Bull. The member's status is set to Resigned in both the Member Section and Member Status sections. The Account Status is set to Suspended Account. The member's details include Title (Mr), First Name (John), Initials (J), Surname (Bull), Gender (Male), and Address (Mr J Bull). The Member Section and Member Status sections both have Current Year and Planned Year set to Resigned. There is a checkbox for 'Change finances for planned year only' which is unchecked.

Here our example member Mr John Bull, has correctly been set to Section = Resigned, and Member Status = Resigned. The Account Status will automatically change to Suspended Account.

The Procedure

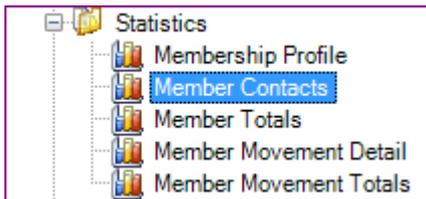
1. Edit the member record.
2. Change the Member Section to the desired setting, e.g. 'Resigned'. This may be in the Planned year if pre-empting the resignation for the next year, or both if the change is immediate.
3. Save the record, read and confirm the dialogs that appear.
4. Edit the same member record.
5. Change the Member Status to the desired setting, e.g. 'Resigned'. Again you may change this for either or both periods, depending on the situation.
6. Save the record, read and confirm the dialogs that appear.

7. There is no need to change the Account Status unless special circumstances require, as it will set to 'Suspended Account' automatically.

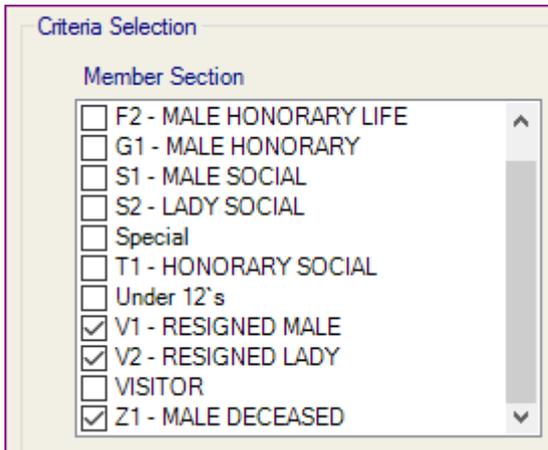
Checking the database

You may wish to query the entire membership database to check for cases where a member has inadvertently been left set to 'Current'. For example, you might have a 'Male Resigned' category. Listing these along with their Member Status is easy, and will reveal records that need to be corrected:

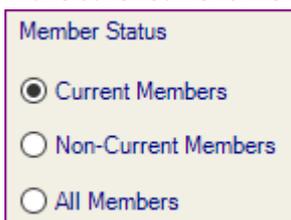
1. Go to Reports.
2. Choose Member Contacts under Statistics:



3. Select the categories of interest, for example we want to list members in the Resigned or Deceased sections:



4. Make sure 'Current Members' is selected under Member Status



5. Click View Report - 
6. The resulting list of members need to have their status set to non-current in their Member Details record.