

How to set up club membership

My Tennis provides the club with the flexibility to

- Define your club membership year
- Create club categories that link to the relevant state categories
- Create club fees and
- Create your membership, assign club fees and link to state membership.

Important: Setting up your club membership must be completed in preparation for registering members.

STEP 1 – Define your clubs membership year

Before you can create a membership category, your club membership year must first be defined.

- Select “[Membership settings](#)” and then “[Club Membership Year](#)” from the menu.
- Select “[Add](#)” to create a new membership year.
- [Add the year](#) for example 2010/2011
- [Add the Begin Date](#). This is the commencement date of the membership.
- [Add the End Date](#). This is the date the membership ceases
- [Select “Yes”](#) from the drop down box to make the membership year active
- You will also note “[Association Financial Year](#)”. Select the appropriate year matching the club membership year from the drop down list.
- Once all details are completed [select “Add”](#).

Important: If the membership year has been created successfully “club membership year has been created” will appear in red.

STEP 2 –Manage Categories

You must create a club category that links to the state category.

- Select “[Membership settings](#)” and then “[Manage Categories](#)” from the menu
- To add a category select “[Add Categories](#)”
- [Create a name for your category](#). For example we will be creating a Senior membership.
- Make the category active by ensuring “[No](#)” is in the drop down box
- [Link your category](#) to one of the state categories by selecting a category from the drop down box.
- [Select “Add”](#)

If the category has been successfully added “[Category Senior Successfully added to database](#)” will appear in blue.

STEP 3 – Manage Fees

Manage fees is where you will set your club membership fees.

- Select “Membership settings’ and then ‘Manage Fees” from the menu
- To create a new club fee select “Add Fee”
- Create a name for the club fee and enter it into the Fee Type box. Our fee type will be Senior.
- Add the fee amount to the amount box – Please don’t include the state fee component in your club fee as this will be added at a later stage
- Select “Submit”

If the fee has been added successfully “Fee has been added successfully” will appear in blue.

STEP 4 – Manage Memberships

Manage Memberships is where you define your clubs membership period and assign fees.

- Select “Membership settings’ and then ‘Manage Memberships” from the menu
- To create a new membership select “Add Membership”
- Enter the membership name to the membership type box. This needs to match the category already created, we are using Senior
- Select the appropriate membership year from the drop down box.
- If your club has a pro rata membership, select “Yes” from the drop down box.
- Select the category that matches the membership type from the drop down box
- Select the state membership the club membership is to be linked to from the drop down box
- Select “Next”
- Using the “Show Calendar” enter Membership from Date and to date. These should match your club membership year dates.
- Using the “Show Calendar” enter the registration period. (This defines when you will start accepting registrations for the above membership period, and when you intend to close the registration period.)
- Select “Next”
- Assign the fee by clicking on the check box for the fees to be associated with the membership. At this point you will see how the state fee is added to your club fee
- Select “Next”
- If you have selected “Yes” for pro rata you will need to complete the fees that will be applicable for each month of the membership year. If you selected “No” this step will not be displayed.
- At month 7 the club fee will automatically drop

You will now be on a screen titled “Add New Membership”. **Important:** Ensure that the club, association and total membership fees are correct for the membership type.

- The membership is now ready to be created. Select “Enter”

If the membership has been added successfully “Successfully Added Membership” will appear in red.

After creating the membership, if you require any changes to be made to the membership just added, it can be reviewed at “Manage Memberships”.

You have now successfully setup your club membership.