

Manage Extras

Learn how to add additional fees or items to your membership packages

Tutorial 8, in this tutorial I will show you how to add an optional extra on top of your clubs membership.

The Manage Extras process will allow you define additional items to purchase during the registration process. These items could range from ball fees, gate keys or even club merchandise. The Manage Extras screen also has the functionality to help the club audit the orders and mark the orders as fulfilled once the order has been satisfied.

Adding the extra:

1. Select the 'Membership settings' and 'Manage Extras' tab from the left hand menu.
2. Select the 'add' button. **Important:** All the fields marked with an asterisk are required fields.
3. **Fill in the extra name.** For this example I will use a gate key. The size and colour is not applicable for a gate key. In these fields simply enter N/A. I would only want the member to be able to select 1 gate key So from the drop down box select 'no'.
4. In the 'Active From Date field', **define the date** of when the item **can be purchased**. Dates can be entered using the text box in the formats shown or by using the show calendar to select each date. These dates will usually be in line with the club membership year.
5. In the 'Active to Date field', **define the date** of when the item **can no longer be purchased**.
6. **Enter the price** of the item.
7. **Select yes** from the drop down box as I want the item to be available. This will allow the members to be able to see the item when they register.
8. **Select 'Add'** to save the extra item to the database.

The new item will be displayed on the Manage Extras data grid and the 'Added Successfully message' will confirm the item as added. The extra will now be able to be selected when a member renews their membership or if a new member joins the club.

Important: If you wish to update the extra after it has been added, select 'update' in the appropriate row of the item to be updated.

Fulfilment :

The manage fulfilment option allows you to identify who has purchased an item and record when the item has been delivered to the member.

1. **Select 'Fulfilment'** for the defined extra Item. The table shows all members who have purchased the item.
2. **Select the 'Update'** link on the appropriate row to update that member's extra item fulfilment information.
3. **Select 'Yes'** from the drop down box to show the order has been fulfilled.

4. Enter the date the order was fulfilled by using the show calendar.
5. Enter your name or the person who fulfilled the order.
6. In the fulfilment comments section enter any necessary comments. For example I will record the gate key number.
7. Select 'Update'.

The information is added to the database. The updated fulfilment date will be displayed.

You now know how to successfully add an extra to your clubs membership.