Member Management Manual

sZen Corp

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1 Members

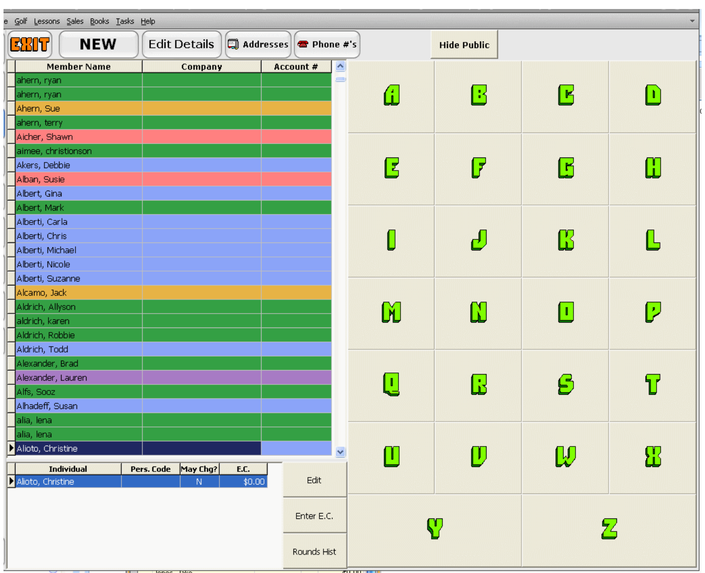
There are three different titles that clients are referred to in sZen, depending on the preferences of each facility. They can either be referred to as Members, Customers, or Guests. For the purposes of this manual, clients will be referred to as Members.

The sZen Member Module is the central place where members are managed. New member accounts may be created, edited, and inactivated here. As much information as is desired can tracked for each member, from just a name, to multiple addresses, phone numbers, e-mail addresses, credit card numbers, and other information.

To open the Member Module:

-**SELECT** the red 'M' button (this may also be a red 'C' or a green 'G' button, depending of preferences)

-This opens the Memberships Screen



1.1 Member Accounts

There are kinds of Member accounts, the Member Account and the Individual Account. The Individual Account is created under the Member Account. For example: A husband and his family want to become members of a facility. The associate creating the new account creates an account with the husbands name as the Member Account name. Creating a Member Account under the husbands name automatically created an Individual Account for the husband under the Member Account. Once the Member Account was created, the associate created Individual Accounts for the wife and kids under the Member Account.

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Adding a Note to the Main Member Account

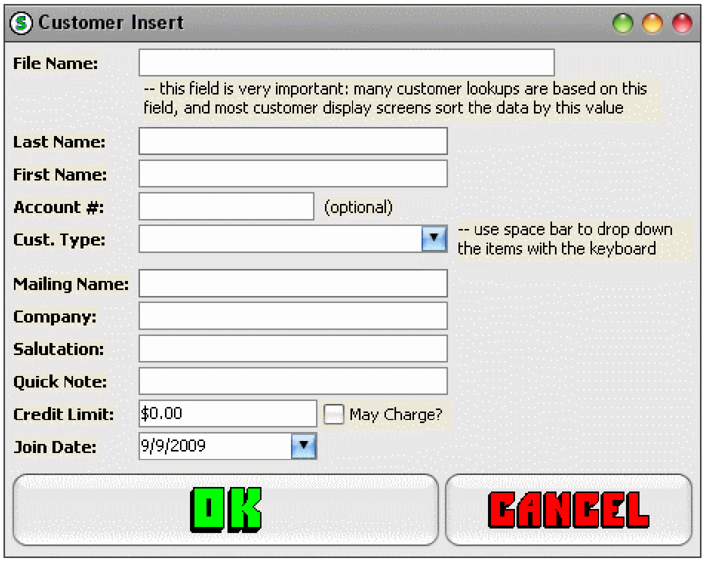
This section details how to create new Member Accounts and manage existing Member Accounts.

Creating a New Main Member Account

To create a new Main Member Account:

-**SELECT** the 'New' button

-This opens the Customer Insert Screen



-**ENTER** the appropriate information*
-**SELECT** the 'Ok' button

The Main Member Account will be created, and will appear in the Memberships Screen.

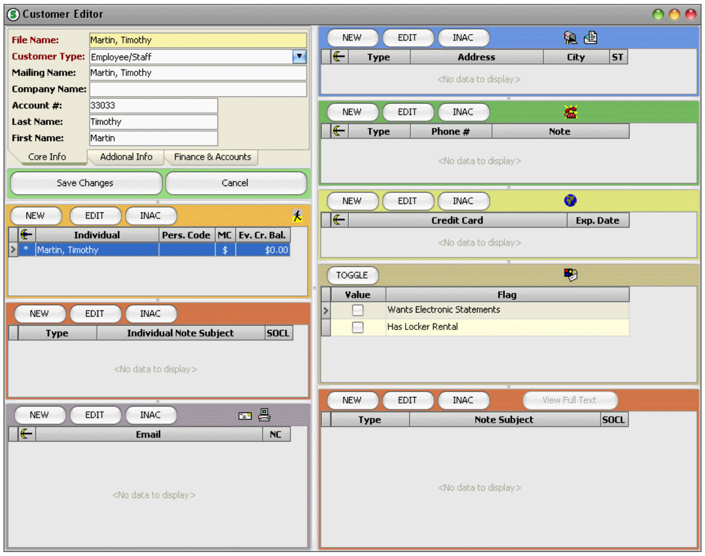
*Member Types (Cust. Type) must first be created in order to select a customer type for the Main Account. This was most likely done during the original install of the software by a sZen Corp Technician. However, details on how to create a Member Type are contained hereafter.

The Customer Editor Screen

Adding and editing information for a customer takes place in the Customer Editor Screen. To get to this screen:

-**HIGHLIGHT** the desired customer account
-**SELECT** the 'Edit Details' button

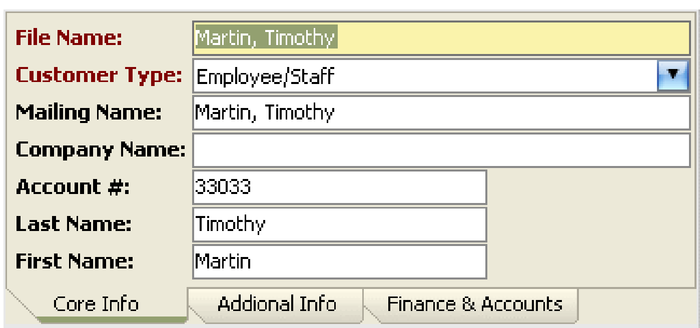
-This opens the Customer Editor Screen



Editing Core Information

The core information for a Member Account are things like the member (customer) type, the customer account number, and first and last names. To edit these things:

-Get to the Customer Editor Screen for the desired member
-Locate the Core Info tab. This will be located just above the 'Save Changes' and 'Cancel' buttons
-**SELECT** the 'Core Info' tab if it is not shown (it is shown by default)
-This is what it should look like:



-**ENTER** the appropriate information
-**SELECT** the 'Save Changes' button

The changes to the core information for the Member Account will be saved. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

Editing Additional Information

Additional information for Member Accounts are things like a salutation, a join date, a default round type, etc. To add or edit these things:

-Get to the Customer Editor Screen for the desired member
-**SELECT** the 'Additional Info' tab
-This is what it will look like:

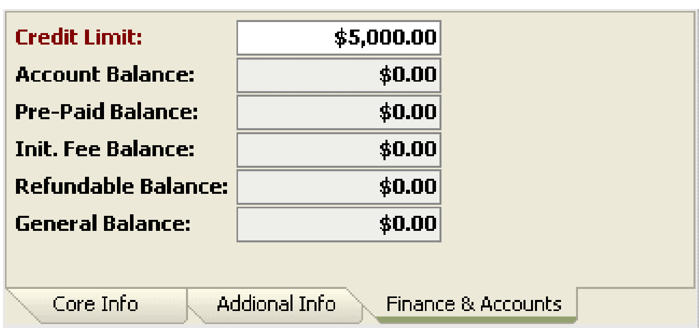
-**ENTER** the appropriate information
-**SELECT** the 'Save Changes' button

The changes to the additional information for the Member Account will be saved. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

Viewing Finance and Account Information and Editing Credit Limits

Information regarding the finance and account status of a Member Account can be viewed, and the credit limit can be edited for Member Accounts. To do this:

-Get to the Customer Editor Screen for the desired Member Account
-**SELECT** the 'Finance and Accounts' tab
-This is what it will look like:



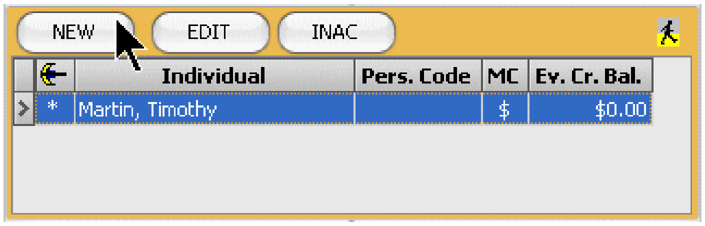
-The only information that can be changed here is the Credit Limit
-**ENTER** the appropriate information
-**SELECT** the 'Save Changes' button

The new credit limit for the Member Account will be saved. All other information is strictly informational and cannot be edited here. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

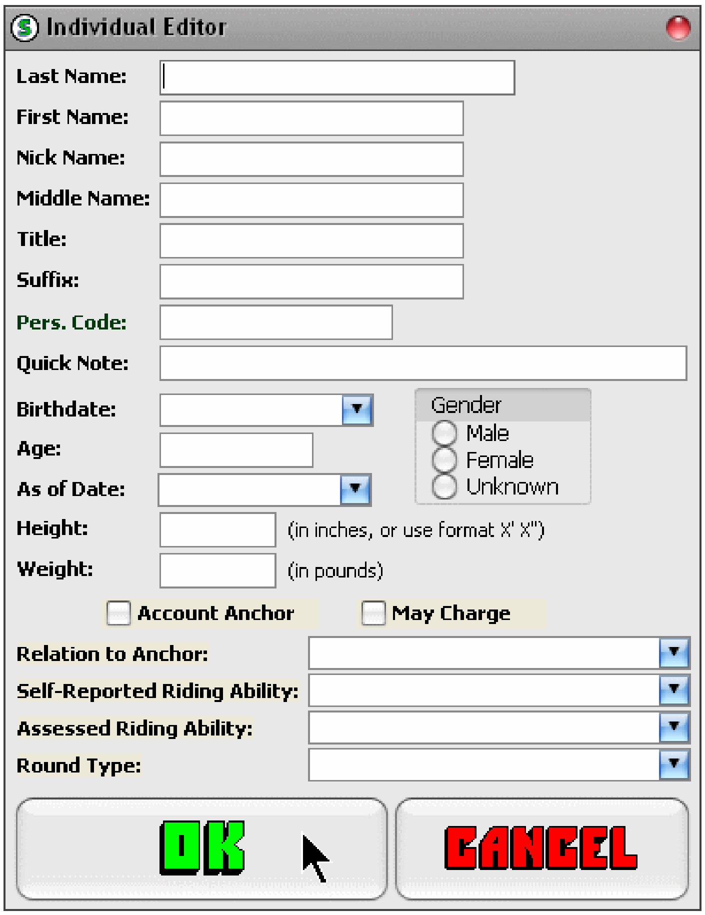
Adding Additional Individual Accounts

There is no limit to the amount of Individual Accounts that can be created under a Main Member Account. To create additional Individual Accounts:

-Get the the Customer Editor Screen for the desired Member Account
-Locate the Individual section of this screen. It will look like this:



-**SELECT** the 'New' button for this section
-This opens the Individual Editor Screen



-**ENTER** the appropriate information
-**SELECT** the 'Ok' button
-The new Individual will appear in the grid
-**SELECT** the 'Save Changes' button

The Individual Account will be saved under the Main Member Account. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

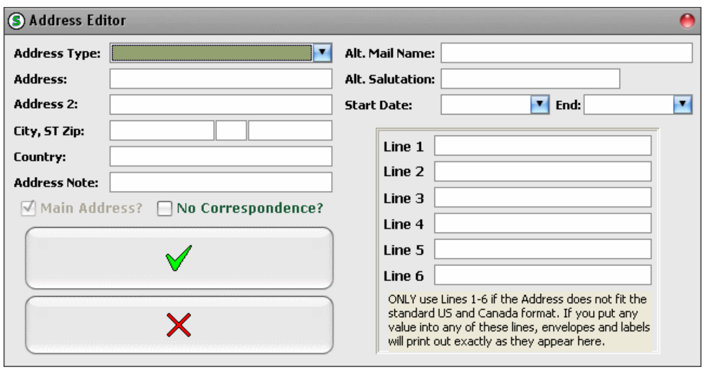
Charge Privileges
If it is desired to allow the Individual Member have charge privileges, the May Charge box must have a check mark placed in it.

Adding an Address

As with Individual Accounts, there is no limit to the number of addresses that can be added to the Main Member Account. To add an address:

-Get to the Customer Editor Screen for the desired Member Account
-Locate the Address Section of the screen. It will look like this:

-**SELECT** the 'New' button for this section
-This opens the Address Editor Screen



-**ENTER** the appropriate information
-**SELECT** the green 'Check Mark' button

The new address will be saved under the Main Member Account. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

Adding a Phone Number

As with Individual Accounts and Addresses, there is no limit to the number of phone numbers that can be added to the Main Member Account. To add a Phone Number:

-Get to the Customer Editor Screen for the desired Member Account
-Locate the Phone Number Section of the screen. It will look like this:

-**SELECT** the 'New' button for this section
-This opens the Phone Insert Screen

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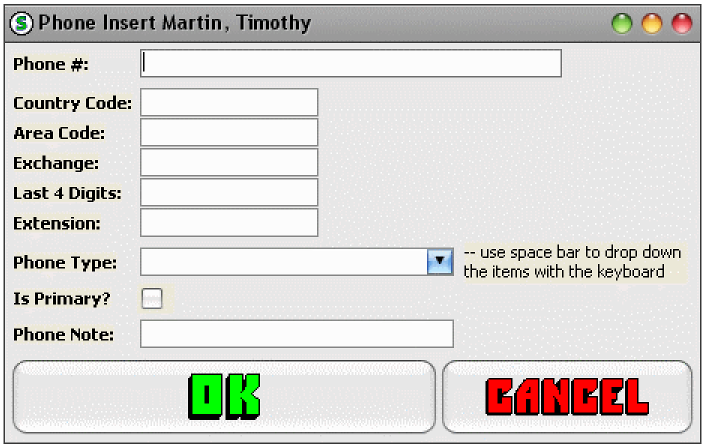


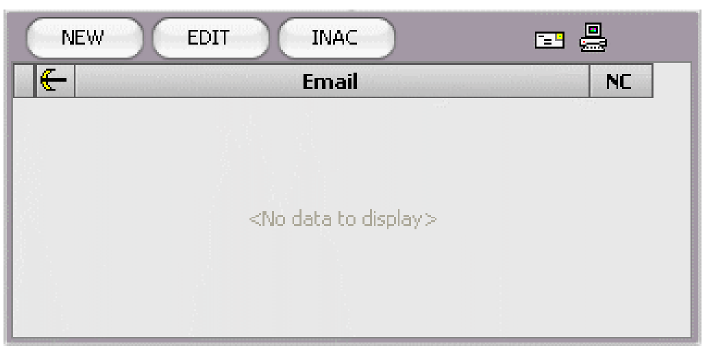
-**ENTER** the appropriate information
-**SELECT** the 'Ok' button

The new phone number will be saved under the Main Member Account. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

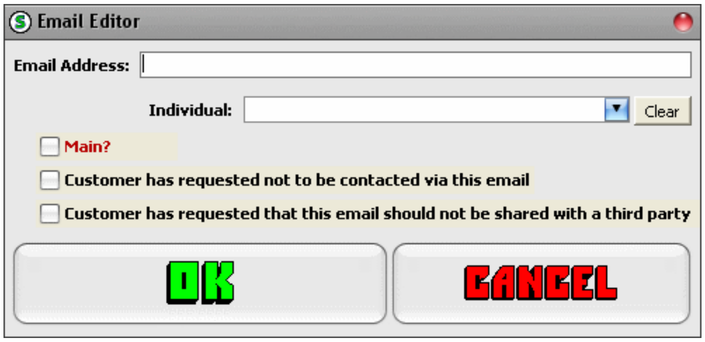
Adding an E-mail Address

As with Individuals, Addresses, and Phone Numbers, there is no limit to the number of E-mail Addresses that can be added to the Main Member Account. To add an E-mail Address:

-Get to the Customer Editor Screen for the desired Member Account
-Locate the E-mail Address Section of the screen. It will look like this:



-**SELECT** the 'New' button for this section
-This opens the E-mail Editor Screen



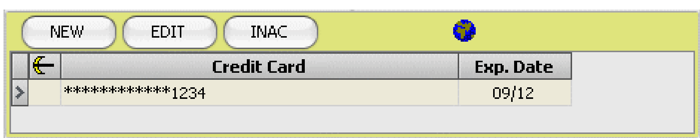
-**ENTER** the appropriate information
-**SELECT** the 'Ok' button

The new e-mail address will be saved under the Main Member Account. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

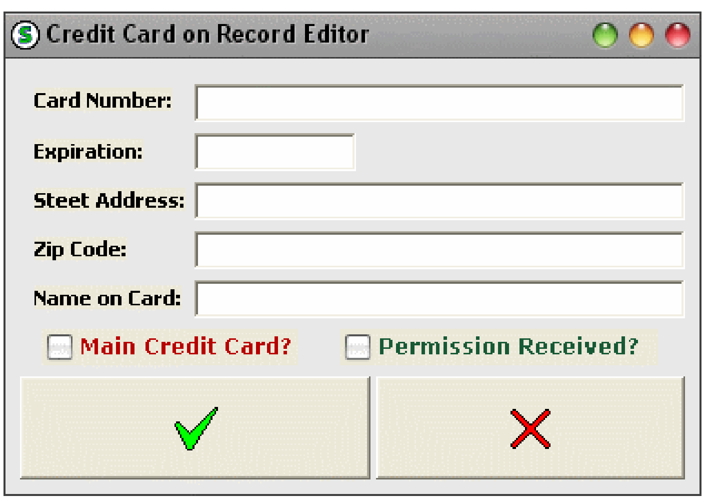
Adding Credit Card Information

There is not limit to the number of Credit Cards that can be added to a Member Account. All credit card information is hidden, and can only be accessed or edited by those with the appropriate security rights in the program. To add credit card information:

-Get to the Customer Editor Screen for the desired Member Account
-Locate the Credit Card Information section of the screen. It will look like this:



-**SELECT** the 'New' button for this section
-This opens the Credit Card on Record Editor Screen



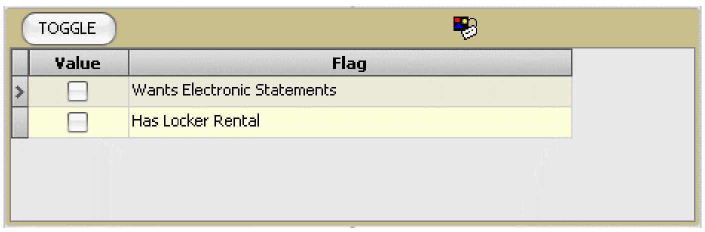
-**ENTER** the appropriate information
-**SELECT** the green 'Check Mark' button

The Credit Card information will be added to the Main Member Account. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

Toggling Custom Flags

Custom Flags make known whether or not certain information or privileges apply to a Member Account. Setting up Custom Flags will be covered in a later chapter. To toggle custom flags:

-Get to the Customer Editor Screen for the desired Member Account
-Locate the Custom Flag Section. It will look like this:



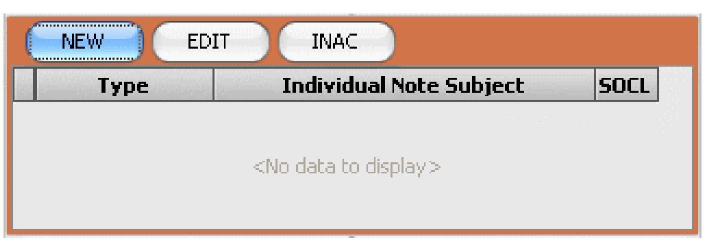
-**HIGHLIGHT** the Flag to be toggled
-**SELECT** the 'Toggle' button

A check mark will appear in the box next to the text. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

Adding a Note to an Individual Account

Individual Notes are notes attached to the Individual Account. For the most part, these are only visible when the Accounts are viewed. However, there are special notes that can be configured to show up at certain places in the sZen system. The most notable of these is the Front Desk or Gatekeeper Note in the sZen Member Account Console (MAC). It will not be shown how to setup these special notes here in this section of the manual. Only how to create a new Individual Note will be detailed. To add an Individual Note:

-Get to the Customer Editor Screen for the desired Member Account
-**HIGHLIGHT** the desired Individual in the Individual Section of the screen
-Locate the Individual Note Section of the screen. It will look like this:



-**SELECT** the 'New' button for this section
-This opens the Cust Note Screen

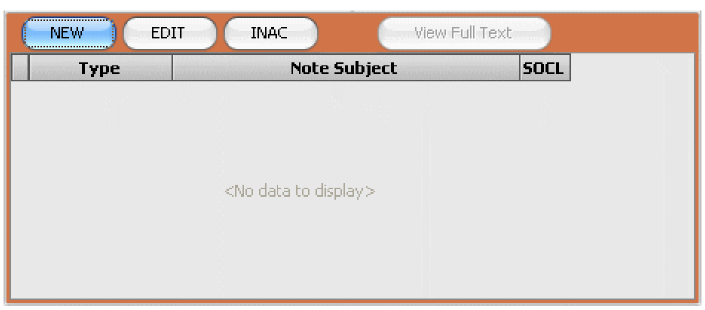
-**ENTER** the appropriate information
-**SELECT** the 'Ok' button

The new note will be added to the Individual Account. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

Adding a Note to the Main Member Account

Main Member Account Notes are similar to Individual Notes. However they are applied to the whole member account, rather than just a certain individual account. To add a note to the Main Member Account:

-Get to the Customer Editor Screen for the desired Member Account
-Locate the Note Section of the screen. It will look like this:



-**SELECT** the 'New' button for this section
-This opens the Cust Note Screen

-**ENTER** the appropriate information
-**SELECT** the 'Ok' button

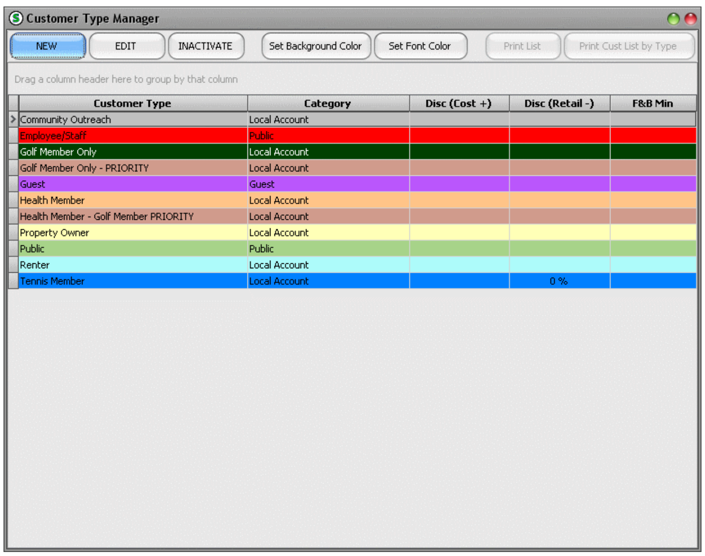
The note will be saved to the Main Member Account. **SELECT** the 'Save Changes' button to exit the Customer Editor Screen and save the applied changes.

1.2 Member Types

The Customer (Member) Type Manager Screen

Customer/Member Types are created and managed from the Customer Type Screen. To get to this screen:

-**SELECT** File from the menu bar and then choose Administrator from the drop down
-This opens the Administrator Screen
-**SELECT** Members from the menu bar and then choose Member Types from the drop down
-This opens the Customer Type Manager Screen

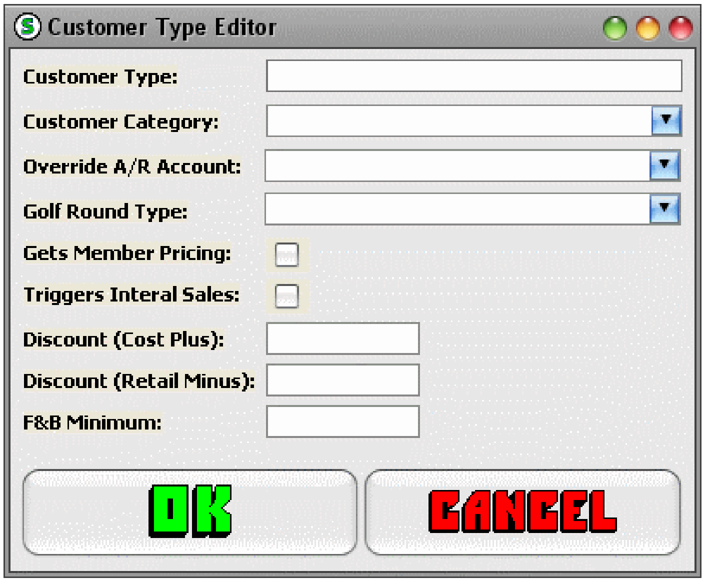


Creating a New Customer (Member) Type

To create a new customer/member type:

-**SELECT** the 'New' button

-This opens the Customer Type Editor Screen



-**ENTER** the appropriate information
-**SELECT** the 'Ok' button

The new customer/member type will be saved.

Editing a Customer (Member) Type

To edit an existing customer/member type:

-**HIGHLIGHT** the desired type
-**SELECT** the 'Edit' button

-This opens the Customer Type Editor Screen with the highlighted type's info already entered into it.
-Make the desired changes
-**SELECT** the 'Ok' button

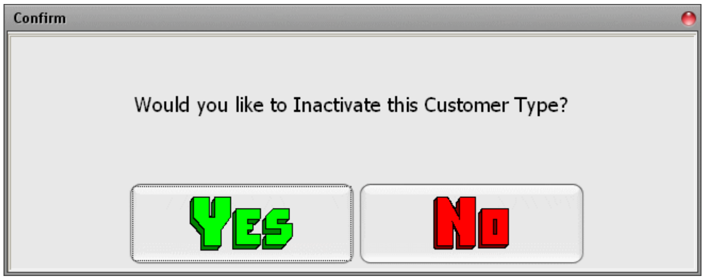
The changes will be saved to the highlighted customer/member type.

Inactivating a Customer (Member) Type

To inactivate a customer/member type that is no longer used:

-**HIGHLIGHT** the desired type
-**SELECT** the 'Inactivate' button

-A confirmation screen will appear



-**SELECT** the 'Yes' button

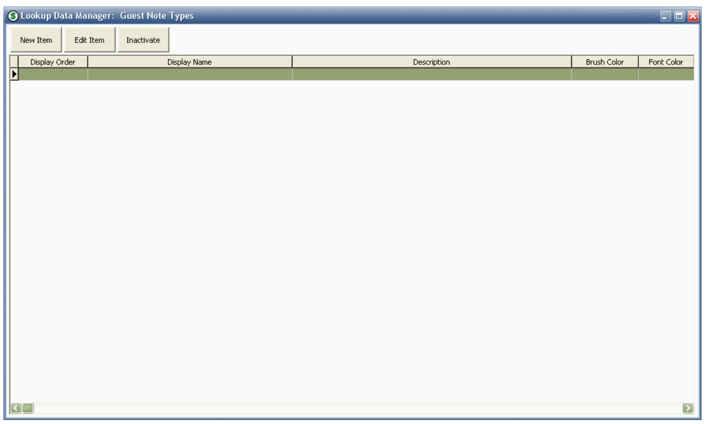
The highlighted customer/member will be inactivated and will no longer appear in the Customer Type Manager Screen.

1.3 Note Type Setup

Creating Note Types for Main Member Accounts

To create a note type for notes attached to Main Member Accounts:

-**SELECT** File from the menu bar then choose Administrator from the drop down
-This opens the Administrator Screen
-**SELECT** Members from the menu bar then choose Member Note Type Setup from the drop down
-This opens the Lookup Data Manager: Guest Note Types Screen



-**SELECT** the 'New Item' button

-This opens some text fields to enter data into

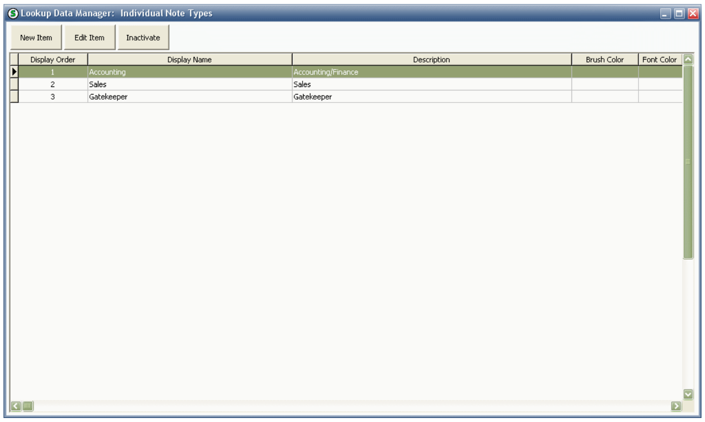
-**ENTER** the appropriate information
-**SELECT** the green 'Check Mark' button

The new Member Note Type will be added to the grid, and will become available for use in the Customer Editor Screen.

Creating Note Types for Individual Accounts

To create a note type for notes attached to Individual Accounts:

-**SELECT** File and then Administrator from the drop down
-**SELECT** Members and then Individual Note Type Setup from the drop down
-This opens the Lookup Data Manager: Individual Note Types Screen



-**SELECT** the 'New Item' button

-This opens some text fields to enter data into

-**ENTER** the appropriate information
-**SELECT** the green 'Check Mark' button

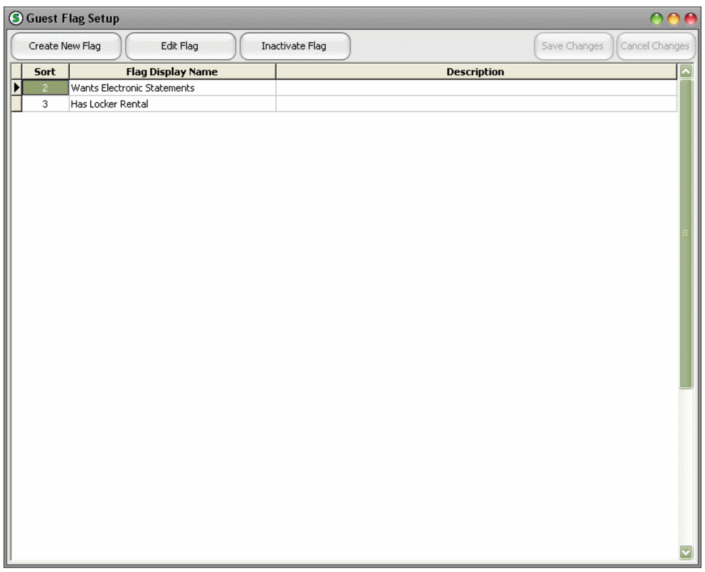
The new Individual Note Type will be added to the grid, and will become available for use in the Customer Editor Screen.

1.4 Custom Flag Setup

Creating a New Custom Member Flag

A custom member flag shows up in the Customer Editor screen and is tied to the Main Member Account. To create a new custom flag:

-**SELECT** File from the menu bar then choose Administrator from the drop down
-**SELECT** Members from the menu bar then choose Member Custom Flag Setup from the drop down
-This opens the Guest Flag Setup Screen



-**SELECT** the 'Create New Flag' button

-This creates a new row in the grid with the fields activated for text entry
-**ENTER** the appropriate information
-**SELECT** the 'Save Changes' button

The new Custom Member Flag will be created, and will be available for use in the Customer Editor Screen.

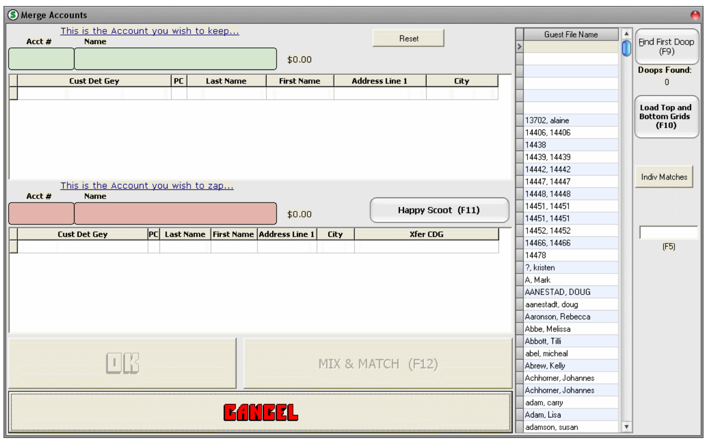
1.5 Merging Member Accounts

Sometimes duplicate member accounts get created. When it is discovered that a duplicate has been created, there is a utility within sZen to merge those two accounts together to create one account. When to accounts are merged, any sales history or financial history for the two accounts will be merged together as well.

The Member Merge Screen

The Member Merge Screen is where member account merge functions happen. To get to this screen:

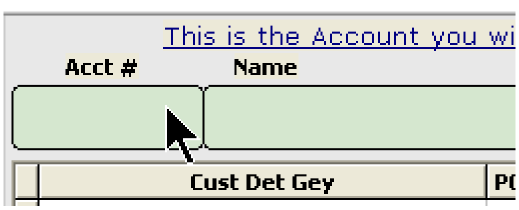
-**SELECT** File from the menu bar then choose Administrator from the drop down
-This opens the Administrator Screen
-**SELECT** Members from the menu bar then choose Member Merge from the drop down
-This opens the Member Merge Screen



Merging Two Accounts

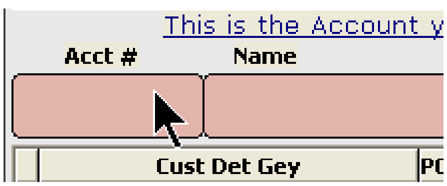
To merge two accounts together:

-**SELECT** the field below the text 'Acct #' that is colored green



-This opens the Select Member Account Screen

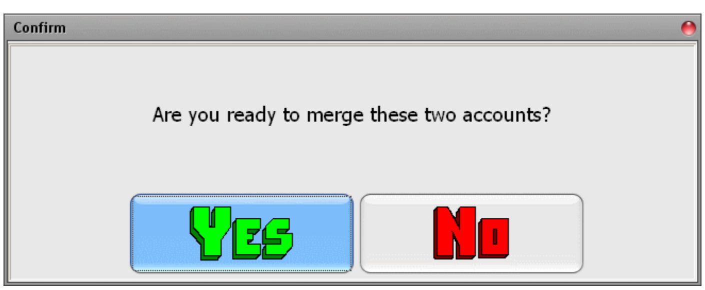
-**LOCATE** and **HIGHLIGHT** the desired member account
-**SELECT** the 'Ok' button
-The information for this member account will be entered into the upper grid. This is the account that will be kept
-**SELECT** the field below the text 'Acct #' that is colored red



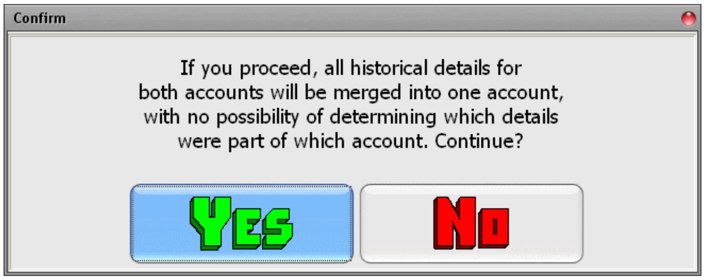
-This opens the Select Member Account Screen
-**LOCATE** and **HIGHLIGHT** the desired member account
-**SELECT** the 'Ok' button
-The information for this member account will be entered into the lower grid. This is the account that will be removed

Once both the account to keep and the account to drop are entered into the grids:

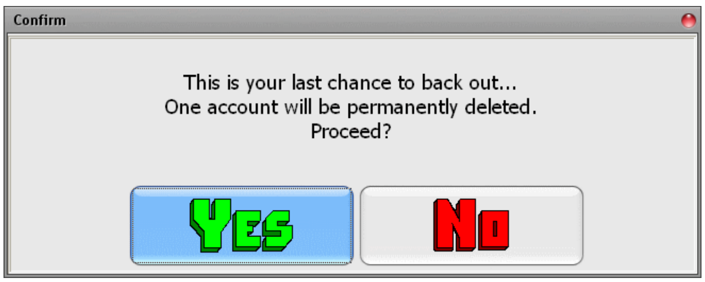
-**SELECT** the 'Ok' button
-A confirmation screen will appear



-**SELECT** the 'Yes' button
-Another confirmation screen will appear



-**SELECT** the 'Yes' button
-Another confirmation screen will appear



-**SELECT** the 'Yes' button

The two accounts will be merged, and once account will be deleted and the other will be kept.

1.6 Reactivating Members

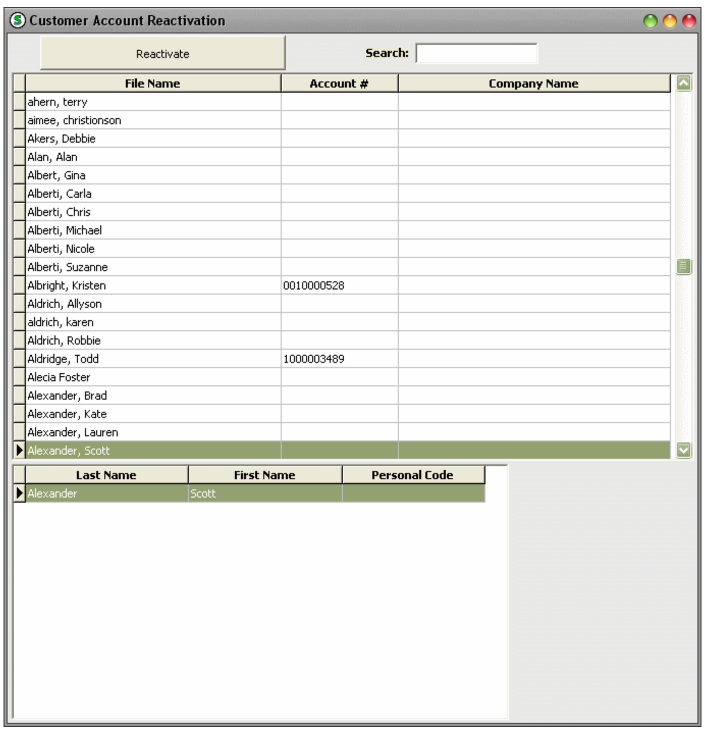
If a Member has been inactivated, but needs to be used again, they can be reactivated. Members can be reactivated at the Main Member Account level or the Individual Account Level.

[Reactivating Main Member Accounts](#)
[Reactivating Individual Accounts](#)

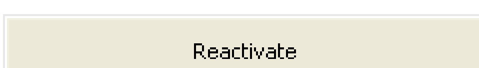
Reactivating Main Member Accounts

To reactivate a Main Member Account:

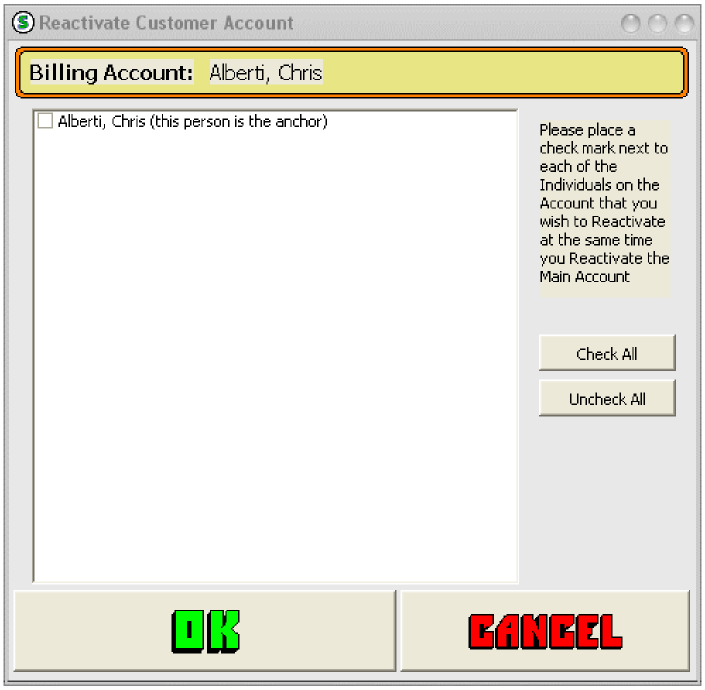
-**SELECT** File from the menu bar then choose Administrator from the drop down
-This opens the Administrator Screen
-**SELECT** Members from the menu bar then choose Reactivate from the drop down
-This opens the Customer Account Reactivation Screen



-The Member Account can be located by either using the Search at the top, or scrolling through the list
-**HIGHLIGHT** the desired Member Account
-**SELECT** the 'Reactivate' button



-This opens the Reactivate Customer Account Screen



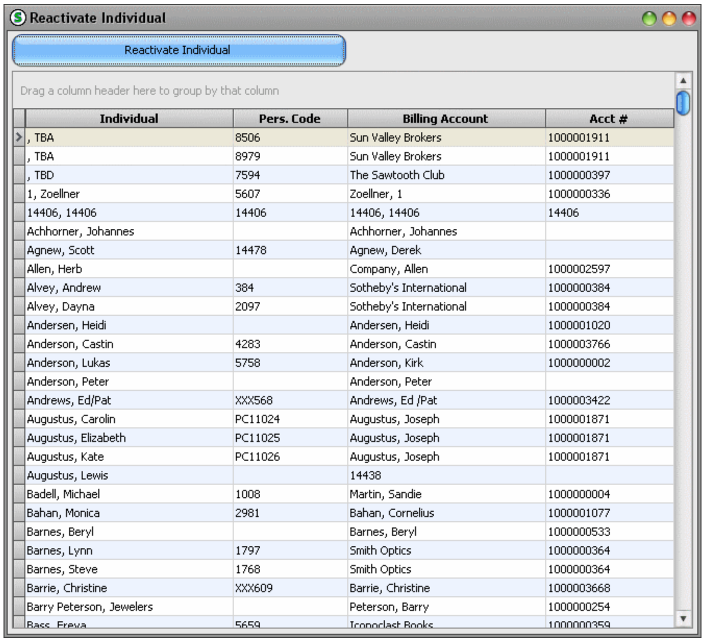
-Put a check mark in the box next to the Individual Accounts to be reactivated along with the Main Member Account
-**SELECT** the 'Ok' button

The highlighted Main Member Account and the selected Individual Account(s) will be reactivated, and will once again appear in the Member Module.

Reactivating Individual Accounts

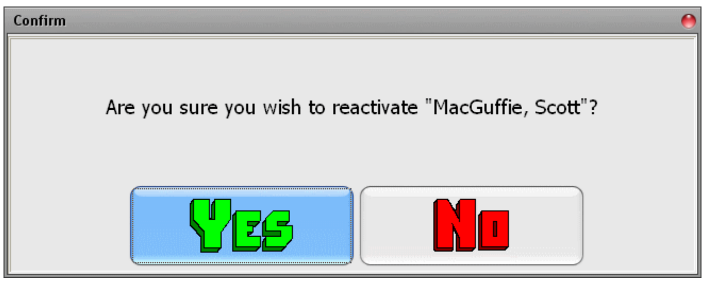
To reactivate an Individual Account:

-**SELECT** File from the menu bar then choose Administrator from the drop down
-This opens the Administrator Screen
-**SELECT** Members from the menu bar then choose Reactivate Individual from the drop down
-This opens the Reactivate Individual Screen



Individual	Pers. Code	Billing Account	Acct #
, TBA	8506	Sun Valley Brokers	1000001911
, TBA	8979	Sun Valley Brokers	1000001911
, TBD	7594	The Sawtooth Club	1000000397
1, Zoellner	5607	Zoellner, 1	1000000336
14406, 14406	14406	14406, 14406	14406
Achhorner, Johannes		Achhorner, Johannes	
Agnew, Scott	14478	Agnew, Derek	
Allen, Herb		Company, Allen	1000002597
Alvey, Andrew	384	Sotheby's International	1000000384
Alvey, Dayna	2097	Sotheby's International	1000000384
Andersen, Heidi		Andersen, Heidi	1000001020
Anderson, Castin	4283	Anderson, Castin	1000003766
Anderson, Lukas	5758	Anderson, Kirk	1000000002
Anderson, Peter		Anderson, Peter	
Andrews, Ed/Pat	XXX568	Andrews, Ed /Pat	1000003422
Augustus, Carolin	PC11024	Augustus, Joseph	1000001871
Augustus, Elizabeth	PC11025	Augustus, Joseph	1000001871
Augustus, Kate	PC11026	Augustus, Joseph	1000001871
Augustus, Lewis		14438	
Badell, Michael	1008	Martin, Sandie	1000000004
Bahan, Monica	2981	Bahan, Cornelius	1000001077
Barnes, Beryl		Barnes, Beryl	1000000533
Barnes, Lynn	1797	Smith Optics	1000000364
Barnes, Steve	1768	Smith Optics	1000000364
Barrie, Christine	XXX609	Barrie, Christine	1000003668
Barry Peterson, Jewelers		Peterson, Barry	1000000254
Bass, Freya	5659	Iconoclast Books	1000000359

-**HIGHLIGHT** the desired Individual Account
-**SELECT** the 'Reactivate Individual' button
-A confirmation screen will appear



-**SELECT** the 'Yes' button

The highlighted Individual Account will be reactivated.