

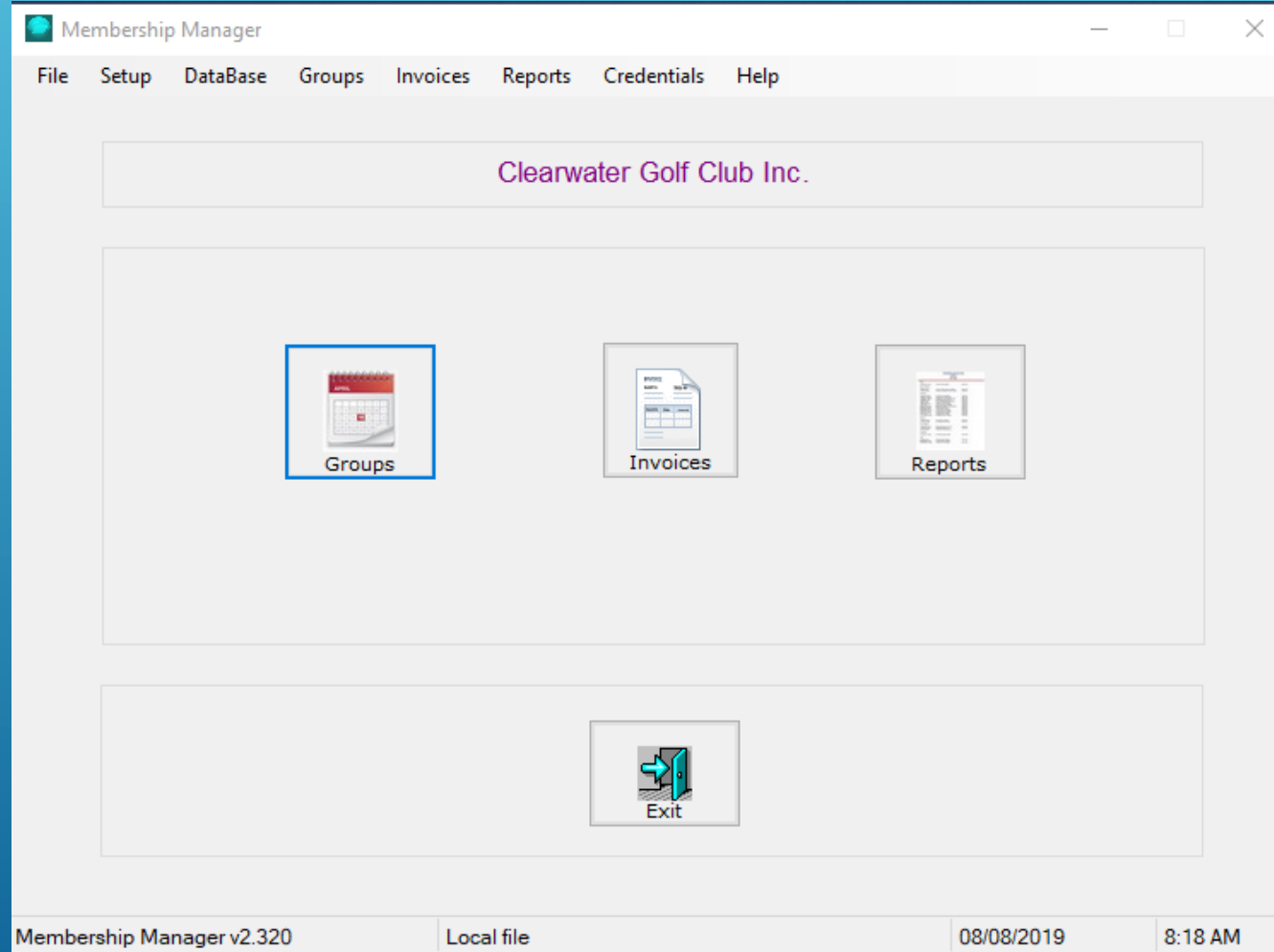
# MEMBERSHIP MANAGER

For MYOB AccountRight files

Software produced by Computing Solutions Ltd



# MEMBERSHIP MANAGER FOR MYOB



# MEMBERSHIP MANAGER FOR MYOB

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- ▶ Membership Manager is approved software Add-on for MYOB AccountRight files
- ▶ It is commonly used by Clubs, Associations and Cultural Groups
- ▶ Key Features
  - ▶ Groups
    - ▶ You can create Groups of Members (eg Teams, Committees, Reunions)
  - ▶ Invoices
    - ▶ Invoices are created in the MYOB file
    - ▶ The user selects the Member Type and Item to invoice (eg Annual subscription for Full Members)
  - ▶ Reports
    - ▶ A range of report formats
    - ▶ Member details, Group Members, Emails to Member Types, Mail Merge options

# MEMBERSHIP MANAGER FOR MYOB

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## GROUPS

- A Group is created with a name, date, and notes
  - The name and notes can describe the Group
  - The Group can be given a Group Type (eg Committee)
- Members are selected from a list of all Members
  - Members may be filtered by Custom List in MYOB
  - Members can be added or removed
- Reports are available to show
  - Which Members belong to any specified Group
  - Details include a Note for each Member (eg Treasurer)
  - Which Groups any specified Member is part of

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## GROUPS

Maintain a Group

Group Settings

Group Name: Senior Golf Team Date: 21/01/2019

Notes: Initial Team

Group Type: Not Allocated  Qualifying Meeting

New Group Save Group

Group Allocation

**Members Available**

All None

- Anderson, Francis
- Calder, Alexander
- Cameron, Angus
- Cathcart, Catherine
- Cockburn, Claude
- Fairbairn, Fiona
- Falconer, Mary

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**Members in the Group**

All None

- Aikman, Robert
- Campbell, Donald
- Fairfax, James
- Galloway, Thomas

Type: X Notes:

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## INVOICES

- A Member type is selected
  - These are from Custom Lists in MYOB
  - Alternatively, Members in a Group can be invoiced
- An Item is selected
  - MYOB Inventory Items are used
  - For example Subscription fees, Reunion costs

# MEMBERSHIP MANAGER FOR MYOB

## INVOICES

**Invoicing Options**

**Invoice Type**

Invoices

Orders

**Invoice Recipient**

**Members**  Members

Include Primary Members

Include Associates

Include Associates

**Associates**  Associates only

**Invoice Method**

Invoice selected Items

Match Item to Member Type

Use Member Item List

All selected Members will be invoiced the same selected Items. Please enter the quantity of all relevant Items.

**Member Selection**

Method 1  Select Member Types

Applicant

Associate Member

Corporate Member

Full Member

Honorary Member

Junior Member

Life Member

Patron

(All Members of the selected Type are invoiced)

Method 2  Select a Group

Senior Golf Team

Method 3  Use Custom Lists

**Select**

Member Type  All entries

Centre  All entries

Mens / Ladies  All entries

**Items to Invoice**

Qty	Item
	Applicant Fee
	Associate Subscription
	Beginners Bellydance Class
1	Corporate Subscription
	Country Member Subscription
	Family Subscription
	Full Member Sub 6 Monthly
	Full Member Sub Annual
	Full Member Sub Monthly
	Honorary Sub 12 Months
	Inventory Item
	Junior Subscription
	Life Membership
	Locker Key

Display  Item Number

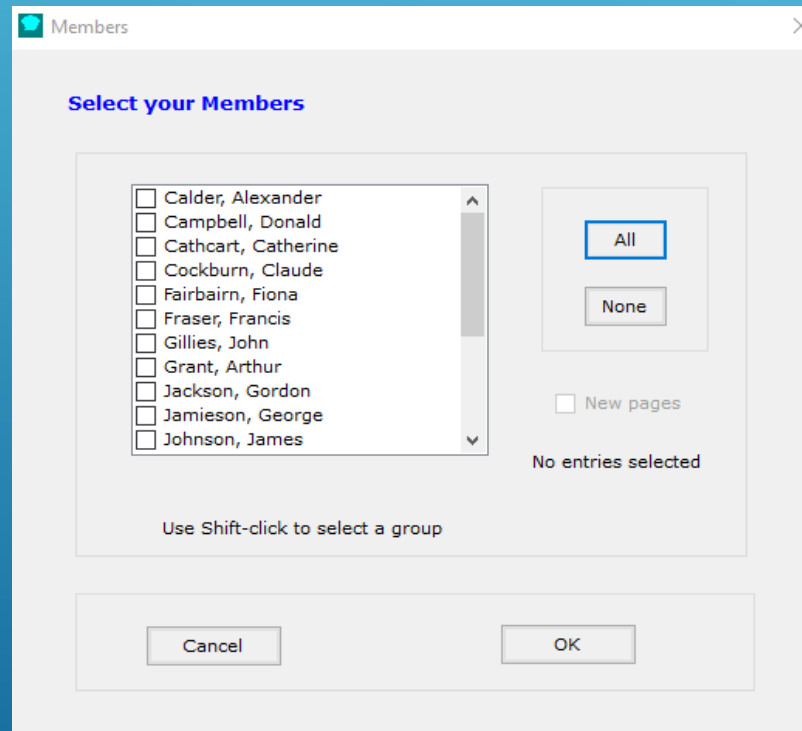
Item Name

Cancel Help OK

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## INVOICES

- Individual Members may then be selected or deselected





# MEMBERSHIP MANAGER FOR MYOB

## INVOICES

Invoicing Options

**Categories**  
Categories are not used

No Category needed  
 Use selected Category

**Customer Purchase Order**

No Purchase Order required  
 Enter Purchase Order   
 Use MYOB Field

**Jobs and Delivery Status**  
Jobs are Optional

No Job needed  
 Use selected Job

**Delivery Status**

**Invoice Comment**

**Journal Memo**

Use Memo  Add to Memo  Replace Memo

**Item Description**

Use Item Name  Use Item Description  Add to Item Name  Replace Item Name

Item Description will be used if set up in MYOB

Cancel OK

# MEMBERSHIP MANAGER FOR MYOB

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## INVOICES

- Invoice fields may be added
  - Order No, Job, Category, Description, Delivery
- The Invoice Date is entered
- A warning about backup is provided
- Invoices are created in the MYOB file
  - The Invoice layout in MYOB is Item
- A Summary is provided
  - Details include Members Invoiced and Items Invoiced

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## REPORTS

- A comprehensive range of reports is included
  - Member Types, Member Addresses, Group Members
  - A Member List can be made into a Member Handbook
- Sample reports show the format of each report
  - The reports are created in an Excel file
- Each report has Options the user can select
  - Columns to include, Sort order
- Email messages can be sent to selected Members
  - Including an attachment

# MEMBERSHIP MANAGER FOR MYOB

## REPORT EXAMPLE: MEMBER ADDRESSES

Clearwater Golf Club Inc.							
Fitzroy							
Melbourne							
VIC, 3065							
Member Addresses							
10/09/2019							
13:29:11							
Last Name	CardID	First Name	Address	City, State	Member Status	Phone1	Email Address
Aikman	3084-023	Robert	Unit 2A, 34 Chester	Melbourne, Vic, 308	Full Member	9876-1234	Robert@sampleEmail.com.au
Anderson	3088-056	Francis	P O Box 32-987, Bri	Melbourne, VIC, 308	Patron	9654-1236	Francis@sampleEmail.com.au
Calder	3185-014	Alexander	236 Albert Street, Ri	Melbourne, VIC, 318	Full Member	8765-4321	Alexander@sampleEmail.com.au
Cameron	3085-026	Angus	34 Lindis Place, Ma	Melbourne, VIC, 308	Applicant	9632-5811	Angus@sampleEmail.com.au
Campbell	3065-007	Donald	74 Governors Cresc	Melbourne, VIC, 306	Full Member	9874-1236	Donald@sampleEmail.com.au
Cathcart	3182-012	Catherine			Full Member	9685-7485	CAth@sampleEmail.com.au
Cockburn	3121-017	Claude	98 Somerfield Stree	Melbourne, VIC, 311	Full Member	9547-8563	Claude@sampleEmail.com.au
Fairbairn	3088-015	Fiona	58 Glasgow Terrace	Melbourne, VIC, 308	Full Member	9365-2541	Fiona@sampleEmail.com.au
Fairfax	3121-007	James	P O Box 45-678, Cre	Melbourne, VIC, 311	Junior Member	9452-1285	James@sampleEmail.com.au
Falconer	3065-003	Mary	381 Trafalgar Street	Melbourne, VIC, 306	Junior Member	9456-3217	Mary@sampleEmail.com.au
Fraser	3084-027	Francis	Flat 3 45 Woodforc	Melbourne, VIC, 308	Full Member	9123-4567	FF@sampleEmail.com.au
Galloway	3182-016	Thomas	45 Centaurus Road,	Melbourne, VIC, 318	Life Member	8521-4789	tom@sampleEmail.com.au
Gillies	3085-008	John	34 Aberdeen Street,	Melbourne, VIC, 308	Full Member	9654-1238	John@sampleEmail.com.au
Gillies	3085-009	Sarah	34 Aberdeen Street,	Melbourne, VIC, 308	Associate Member	9654-1238	
Gillingham Golf	*None				Corporate Member		peter@computingsolutions.co.nz
Grant	3121-034	Arthur	P O Boc 123-654, Ri	Melbourne, VIC, 311	Full Member	8632-7456	Arthur@sampleEmail.com.au
Industrial Chem	*None				Corporate Member		
Jackson	3088-016	Gordon	20 Perry Street, Bri	Melbourne, VIC, 308	Full Member	9745-6352	gordon@sampleEmail.com.au

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## REPORT EXAMPLE: MEMBER LABELS

	A	B	C
1	Donald Campbell		Alexander Calder
2	74 Governors Crescent		236 Albert Street
3	Fitzroy		Ripponlea
4			
5			
6			
7	Robert Aikman		Francis Anderson
8	Unit 2A		P O Box 32-987
9	34 Chester Street		Briar Hill
0	Heidelberg		
1			
2			
3	Claude Cockburn		Fiona Fairbairn
4	98 Somerfield Street		58 Glasgow Terrace
5	Cremorne		Briar Hill
6			
7			
8			

# MEMBERSHIP MANAGER FOR MYOB

## REPORT EXAMPLE: MEMBER LIST

	A	B	C
1		<b>Clearwater Golf Club Inc.</b>	
2		Fitzroy	
3		Melbourne	
4		VIC, 3065	
5			
6		<b>Member Details</b>	
7	10/09/2019		
8	13:46:41		
9	Last Name		First Name
10	<b>Full Member</b>		
11	<b>Briar Hill</b>		
12	FAIRBAIRN		Miss Fiona
13	JACKSON		Mr Gordon
14	<b>Brunswick</b>		
15	MACALISTER		Mr Alister
16	<b>Carlton</b>		
17	JOHNSON		James
18	<b>Coolaroo</b>		
19	WILLIAMSON		The Hon. William
20	<b>Cremorne</b>		
21	COCKBURN		Mr Claude
22	<b>Essendon</b>		
23	CAMPBELL		Mr Donald
24	LECKIE		Mr John
25	WATT		Sir James
26	<b>Fairfield</b>		
27	JAMIESON		Mr George
28	MACARTHUR		Mr Arthur
29	WALLACE		Rosemary

# MEMBERSHIP MANAGER FOR MYOB

## REPORT EXAMPLE: MEMBER SETTINGS

	A	B	C	D	E	F	G	H
1			<b>Clearwater Golf Club Inc.</b>					
2			Fitzroy					
3			Melbourne					
4			VIC, 3065					
5								
6			<b>Member Settings</b>					
7	10/09/2019							
8	13:51:27							
9								
10	Ident	LastName	FirstName	Member Type	Centre	Mens / Ladies	Custom Field #1	Date Joined
11								
12	3084-023	AIKMAN	Robert	Full Member	Heidelberg	Men		07021920
13	3088-056	ANDERSON	Francis	Patron	Briar Hill	Men	Field1 9/12	28/01/1986
14	3185-014	CALDER	Alexander	Full Member	Ripponlea	Men		07-03-1923
15	3085-026	CAMERON	Angus	Applicant	Macleod	Men		1/7/2010
16	3065-007	CAMPBELL	Donald	Full Member	Essendon	Men		12-05-1923
17	3182-012	CATHCART	Catherine	Full Member	St Kilda	Ladies		12/03/2001
18	3121-017	COCKBURN	Claude	Full Member	Cremorne	Men		21.12.2009
19	3088-015	FAIRBAIRN	Fiona	Full Member	Briar Hill	Ladies		21.12.2008
20	3121-007	FAIRFAX	James	Junior Member	Cremorne	Men		7/8/2008
21	3065-003	FALCONER	Mary	Junior Member	Fitzroy	Ladies		15/05/2005
22	3084-027	FRASER	Francis	Full Member	Heidelberg	Ladies		15/08/1979
23	3182-016	GALLOWAY	Thomas	Life Member	Executive Committe	Men		16/6/2006
24	3085-008	GILLIES	John	Full Member	Macleod	Men		21.12.2004
25	3085-009	GILLIES	Sarah	Associate Member	Macleod	Ladies		13/12/2001
26	*None	GILLINGHAM GOLF INC		Corporate Member				21/2/2002
27	3121-034	GRANT	Arthur	Full Member	Richmond	Men		23/12/2007

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## REPORT EXAMPLE: MEMBER EMAILS

The screenshot shows a dialog box titled "Email Details" with a close button (X) in the top right corner. The main area is titled "Enter Email Details" and contains the following elements:

- Subject:** A text box containing "Annual General Meeting".
- Message:** A text box containing the following text:  
Hi Folks  
This is to advise that the next AGM is due to be held on Thursday 12th September at 7pm, in the Cashmere Club. The address is 357 Colombo Street. Hoping to see you there. Peter Oliver
- Options:** Three radio buttons are present:
  - Attach a file
  - Email All
  - Confirm each one
- File Attachment:** Below the "Attach a file" option, there is a button labeled "Email File" and a blue text link labeled "Notice of AGM.pdf".
- Buttons:** At the bottom of the dialog, there are two buttons: "Cancel" on the left and "OK" on the right.



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## SUMMARY

- The software can be downloaded from the website below
- Any enquiries may be emailed to:  
[info@computingsolutions.co.nz](mailto:info@computingsolutions.co.nz)
- For further details see:  
[www.computingsolutions.co.nz](http://www.computingsolutions.co.nz)