Membership Management
Quick Reference Guide

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Introduction

This Quick Reference Guide will explain the steps required to configure Membership Management within the Spa & Activities module.

It is assumed that the reader is familiar with:
- The Maestro user Interface
- Posting Code creation
- Permanent Client creation

Setup and Configuration

In order to begin the setup process for Membership Management some of the System Options for the Spa & Activities Module must be completed as they are mandatory fields. The System options relating to Membership Management commence with the option *"Member System on"*

Club Management Maintenance| Setup | System Options

From the *Setup* menu, **select** *System Options*.

If the Global Setup for the Spa & Activities Management module has already been configured then proceed to – the next section. To make any changes please consult the Spa & Activities Management QRG or contact Maestro Support at 905-940-1924

The following are the recommended configuration options where the property is **_ONLY_** using Club Membership Management within the Spa & Activities module:

Basic Club System Options

Option	Description	Recommended Selection
FD Flag	Front Desk Flag	**Key** a '_Y_' if property is currently using Maestro's Front Desk module, otherwise **Key** an '_N_'
Use Text Entry	To use Text boxes and word wrapping in place of Line numbers	"Y"
A/R Client Code	Default A/R Account	Create a Spa & Activities Master in AR – enter the Client code or look-up to locate it or **F8** to look up
Svcpkg Brk Clnt	Default Spa Service Package Breakdown Account	Create a Spa Service Package Breakdown Account as a permanent client in AR. Enter or **F8** to look-up. This should be a permanent account
Posting Code	Default Posting Code for Spa Charges	**F8** to select a default Spa Posting Code
Gratuity Pst Cd	Default Gratuity Posting Code for Spa	**F8** to select a default Gratuity Posting Code
Hotel Svc Chg Clnt	Default Hotel Service Charge Client Account	Create a Hotel Service Charge Client in AR where the Spa Service Charge can be posted to or **F8** to look up. This should be a permanent account
Facility Inv	Use Facilities Inventory	"N" – Leave as is if already filled in
Shuttle Inv	Use Shuttle Inventory	"N" – Leave as is if already filled in
Service Inv	Use Service Inventory	"N" – Leave as is if already filled in
Activity Inv	Use Activity Inventory	"N" – Leave as is if already filled in
Alternate Inv	Use Alternate Inventory	"N" – Leave as is if already filled in
Def Guest Type	Default Guest Type (used for Alternate Inventory ONLY)	From the _Setup_ menu in Spa & Activities Maintenance select _Guest types_ and **Key** "hotel" as the guest type and "hotel guest" as the description. Populate this guest type in the _Def Guest type_ on the System options screen
Guest pkg rate cat	Default package rate	Leave blank or leave as is if already filled in
Source Business	Default Source of business	Leave blank or leave as is if already filled in

FD Res Cancel	Default cancel/turnaway reason	From the *Service* menu in *Spa & Activities Maintenance* select the *Turnaway/Cancel Reason* and enter "ERR" as the reason code; in the Reason type look-up and select "C" cancel reason; enter Clerk Error as the Description and press enter until the cursor is on the next line. In the system options screen select "ERR" here. Leave as is if already filled in
FD Res Change	Default change reason	*F8* to select the Cancel Reason Code of *ERR*
Skip NA Service Posting	Skip Night Audit posting	Leave blank or leave as is if already filled in
Force Svc Start Deliq trace on Dshbrd Remind to Assign Provider Force Turnaway	Force Service Start Delinquent Trace on Dashbrd Remind to Assign Provider Force Turnaway	"N" or leave as is "N" or leave as is "N" or leave as is "N" or leave as is
Default # Rooms (5/12)	Default # of Rooms and/or Providers	*Key* a 5 or a 12 or leave as is
FD Services Default	Front Desk Services Default Screen	*F8* and select the default screen to be viewed when booking a spa booking from Front Desk. OR Leave as is.
Default Time Interval	Default Time Interval on Services by Day and Provider Bookings screens	*Key* 15, 30, 45 or 60 or leave as is.
Spa Ins Rcpt Opt	Spa Insurance Receipt Options	*F8* and select an option or leave as is.
Allow Cxl DynPkg Booking	Allow Cancellation of Spa Booking created through a Dynamic Package	"N" or leave as is

Membership Management System Options

| Option	Description	Configuration Option
Member System on	Allows the use of Membership Management.	"Y"
Create Mbr Due Folio	Should a new folio for Membership Dues should be created every time member dues are posted	Y or N
Crystal Mbr Flag	If set to Y this allows the system to run the Crystal Member Statement	Y or N
Consolidate Mbr Stmt	*Key* a '*Y*' then all charges from Spa are included in the Member Statement.	Y or N
Member Stmt Format	Select the format of the member statement.	Select 1

		NOTE: Currently for future development	
Receipt Code	System posting code used to distribute payment as part of the receipt creation process	F8 and select the posting code.

NOTE: A different posting code should be used in Member Management than in the AR module | |
Carry Forward Aging	Should aging be carried forward based on transaction date or Folio creation date	Y or N	
Age Payments	Should payments be aged	Y or N	
Age Discounts	Should Discounts (i.e. late payment charges or charge codes posted as a negative number) be aged	Y or N	
Age by Effective date	Should aging be based on effective (i.e. transaction) date or Print date (i.e. based on the Folio creation date)	E – Effective date or P – Print Date	
Stmt Hdr Date Override	Should aging be based on date the Statement was last run	Y or N	
Image Folder	Path where the Member Images are located	i.e., C:\folder name	
Layout Folder	Path where the Member Card Layout is located	i.e., C:\folder name	
EFT Folder	Path to the folder where EFT CSV files are created	i.e. C:\folder name	
Generate EFT	Refer to EFT QRG	There are 4 options:
Key an '*N*' to NOT generate dues payments via EFT.
Key a '*C*' to generate dues payments via credit cards on file only.
Key an '*F*' to generate dues payments using a CSV file.
Key a '*Y*' to generate dues payments via on file credit cards and a CSV file.	
EFT Posting code	Settlement posting code used during folio recording of an EFT payment	Leave blank if not required	

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Club Management Member Setup

Please note that **all** the configuration options for Membership Management are accessed from the *Setup* menu in *Spa and Activities Maintenance* and the *Member Setup… option.*

To begin configuring Member Management users should follow the steps outlined below:

From the *Spa and Activity Maintenance Module*, access *Setup | Member Setup*
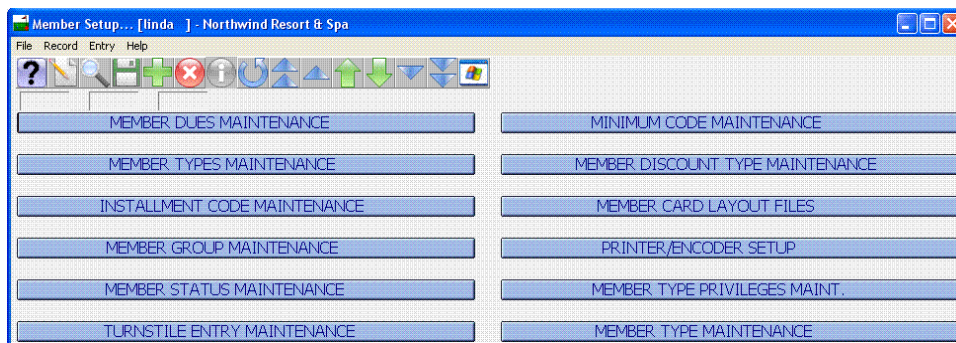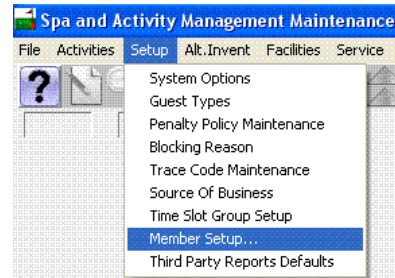
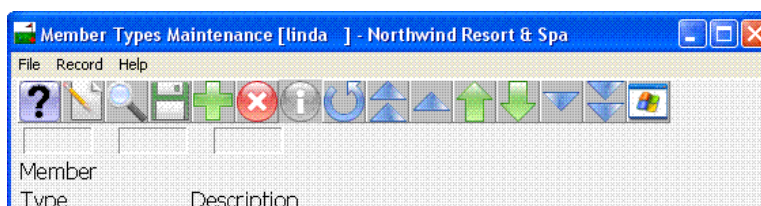

Member Status Maintenance

Create the member status codes here that will link to the existing Client (Account) status codes already setup globally. **F6** to create a new *Member Status* and description and then **F8** to link them to the appropriate existing *Client Status*. See the examples below:
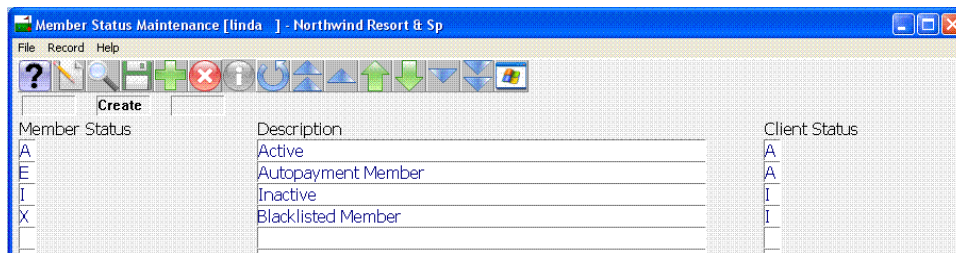

Member Types Maintenance

From here, **F6** to create your *Membership Types*. By having different Membership Types, the user is able to control Membership Dues, Minimum Spend and Discounting requirements.

> **NOTE**: Member statements can also be run based on the member type

Installment Code Maintenance

Installments are the periods that you charge the Membership Dues i.e., Monthly, Quarterly etc. Installments are linked to the Member types and there is no limit in the number that can be created. In addition, multiple charges can be setup per Installment (see Member dues Maintenance)
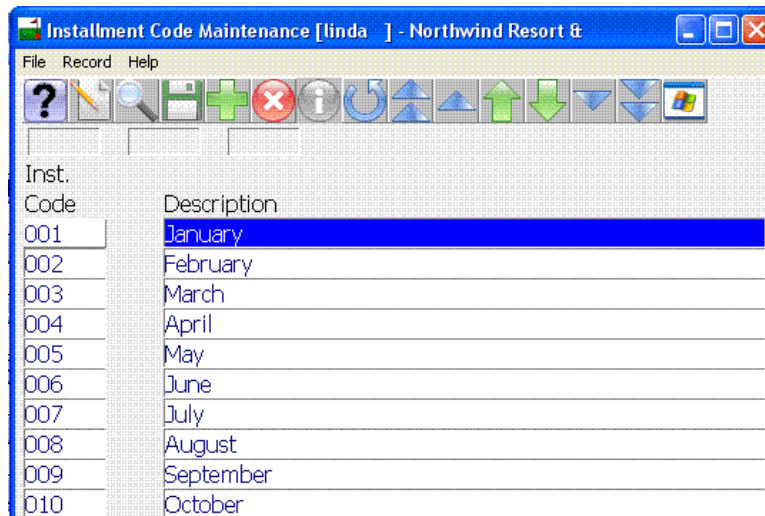
> **NOTE**: *It is suggested for monthly installment codes that the Installment Code be numerical with three digits as displayed above. In this way the installment codes will sort from January to December.*

Once the Installment codes have been created exit from this screen by pressing "*F4*" to return to the Member Setup… menu.

Member Dues Maintenance

From here, the user can create templates for Membership Dues. Only one member due can be attached to a member type. Within each of these codes different schedules for Dues can be configured.

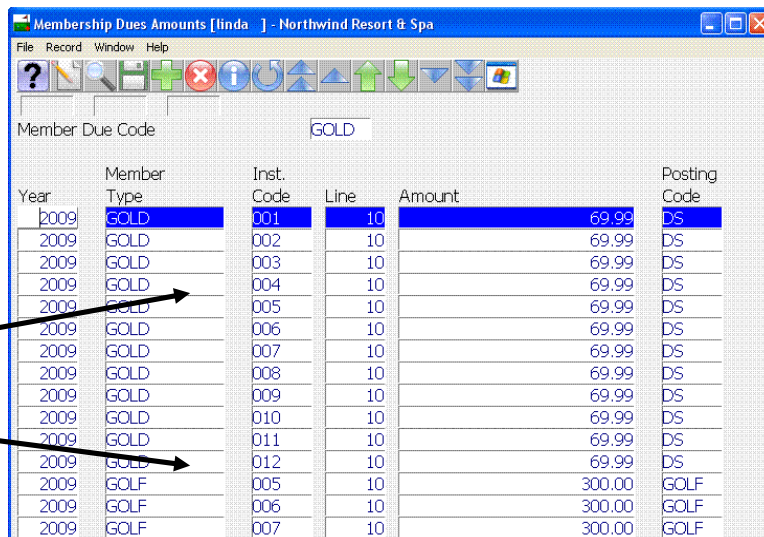In the due code field type in the alphanumeric code for this member due and then type a description in the description field.
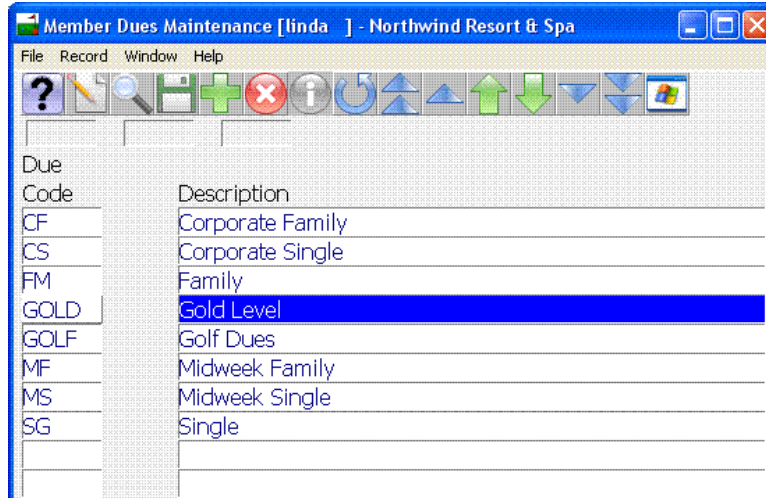
F5 (Drill Down) on the *Code* just created to access the *Membership Dues Amounts* screen

Dues need to be created for each period and cannot be reused.

1. Start by typing in the year that these dues are for
2. F8 in the member type field and select or type in the member type that this due is associated with
3. Next, F8 to select the installment code that this due relates to.

NOTE: The same installment code can be attached to multiple dues.

4. Maestro will auto-populate the line number field with 10 for the first instance of this due
5. The line number and posting code field allow the property additional flexibility to itemize dues. For example dues for a Golf Club could be configured to show Green Fees and Club Access fees separately.
6. As many line numbers and posting codes can be used as required and dues can be created as far into the future as the property needs.

> **NOTE:** *Prior to configuring the Membership due amounts, the posting codes required should be created within Global Maintenance.*

Once all the due amounts have been created for this Due code, **F4** to return to the *Member Dues Maintenance* screen. If additional due codes and due amounts are required these can also be created otherwise press **F4** to return to the *Membership Setup…* screen.

Member Group Maintenance

From here, the user can create Membership Groups. Membership Groups can be attached to Member Profiles. These are for reporting purposes and allow member types to be broken down into sub-categories.

> **NOTE**: *Currently Member Statements cannot be run by Member groups.*
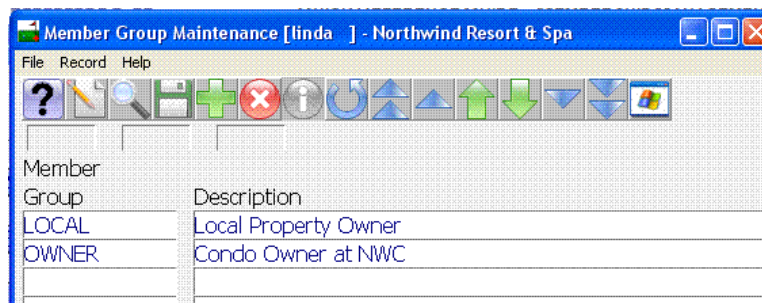
F6 to enter the alphanumeric member group codes and the descriptions. Once complete **F4** to return to the *Member Setup…* menu

Minimum Code Maintenance

Minimum code Maintenance allows the property to specify the total amount that a member is required to spend. The posting codes that count towards this minimum spend can also be defined.

> **NOTE**: *Multiple minimum codes can be created although only one minimum code can be attached to a member profile.*

1. **F6** to create the alphanumeric *Minimum Code*
2. **Key** the date range that this code is valid for
3. **Key** the total amount that should be spent within this date range
4. **F5** or Drill down on the minimum code to define the valid posting codes that contribute towards the minimum amount to be spent
5.   Any posting codes not listed here will not contribute towards the minimum code amount.

> **NOTE**: *The same posting code cannot be repeated.*
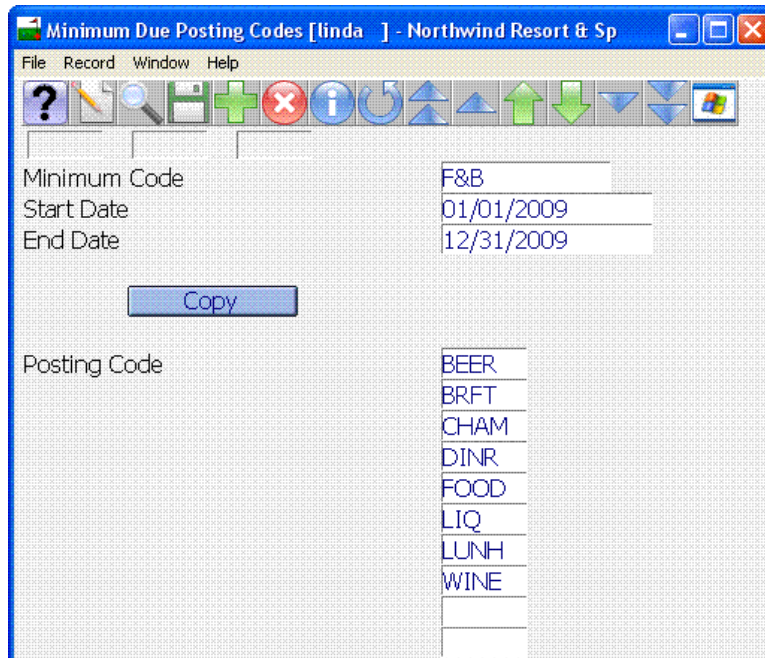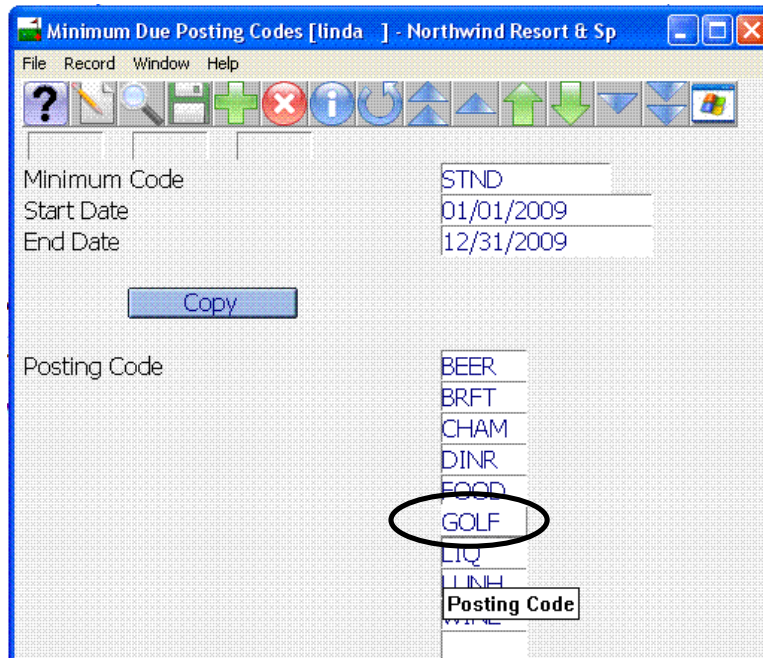

Where multiple minimum codes are required or when building minimum codes for a different time period the posting code list from one minimum code can be copied to another by pressing the copy button.
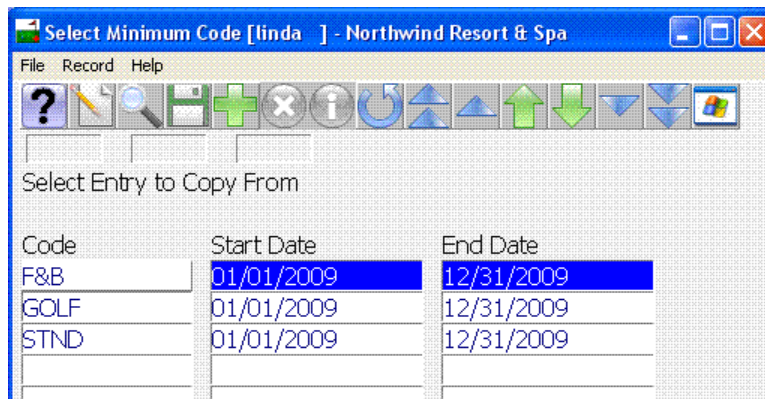
To select the Minimum code to *COPY FROM*, left click on the code or use the up or down arrow keys on the keyboard to highlight the desired code then press **enter** to select.

The posting codes from the selected minimum code will be pasted into the new minimum code. When the required minimum codes have been entered and other codes have been entered, press **F4** to exit back to the *Member Setup* menu

Member Discount Type Maintenance

The following is still in development, but can be entered for reference purposes at this time.

Member discount types can be created to allow members to be eligible to receive discounts. Each discount type can be configured with unique eligibility and threshold levels.

> **NOTE**: Multiple discount types can be created although only one member discount type can be attached to each member profile.
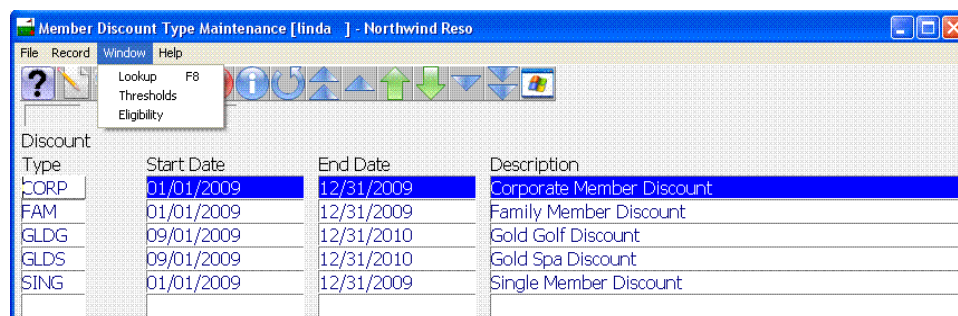
- **F6** to begin creating the Discount Types and the date range for each type.

Thresholds allow the property to configure the discounts that are available based on the member type, sales location and day of the week.

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- The discount percentage controls the discount granted
- The amount field defines the threshold or level to spend that is needed to qualify for the discount
- Highlight a specific discount type and go to *Window | Thresholds t*o configure the Thresholds
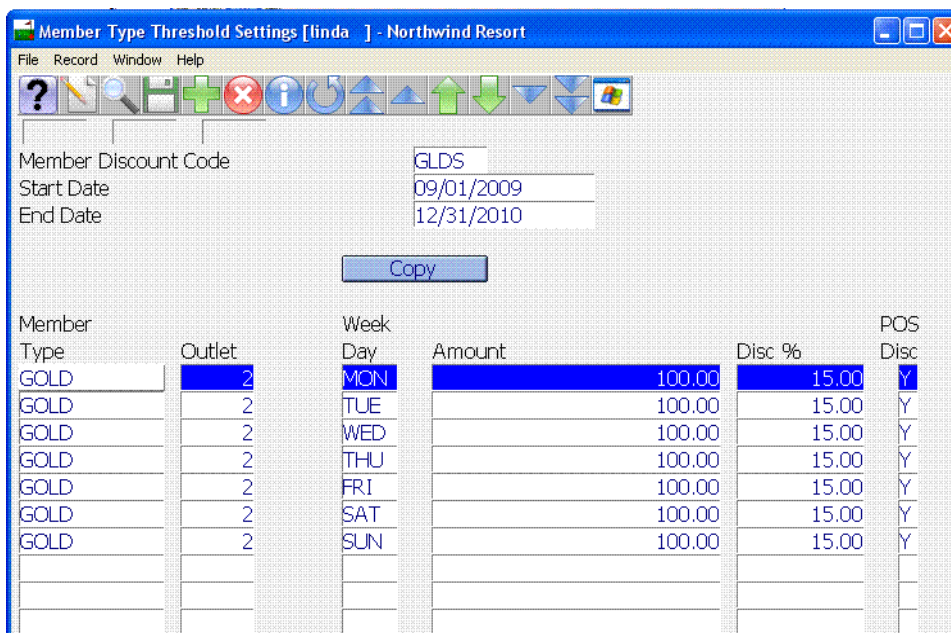
Discount Thresholds can be copied from other discount types or from the same discount type but from a different time period. This can be done by clicking on the copy button and selecting the Discount type to copy.

- Once Thresholds are completed press **F4** to return to the *Member Discount Type Maintenance* screen
- **Select** *Window | Eligibility* to define the *Member Type Eligibility* for the discount, i.e. which posting codes are affected
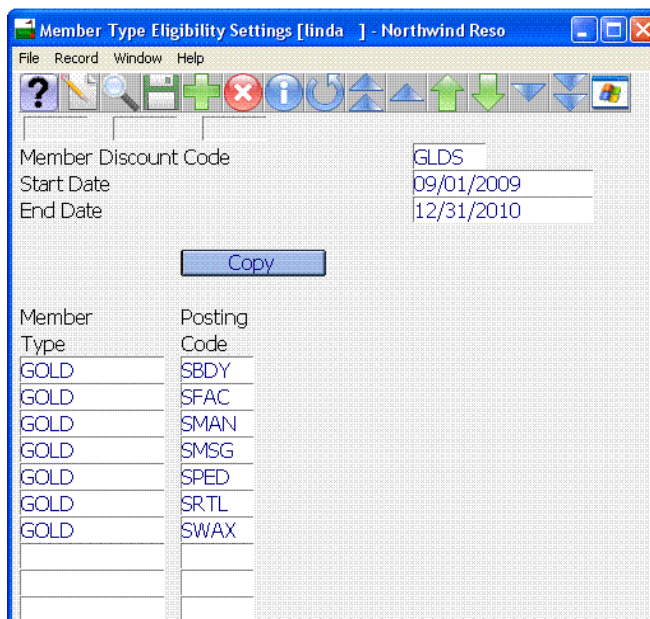
> *NOTE*: *By clicking the copy button on this screen, member types and associated posting codes can be copied from different eligibility periods or settings*
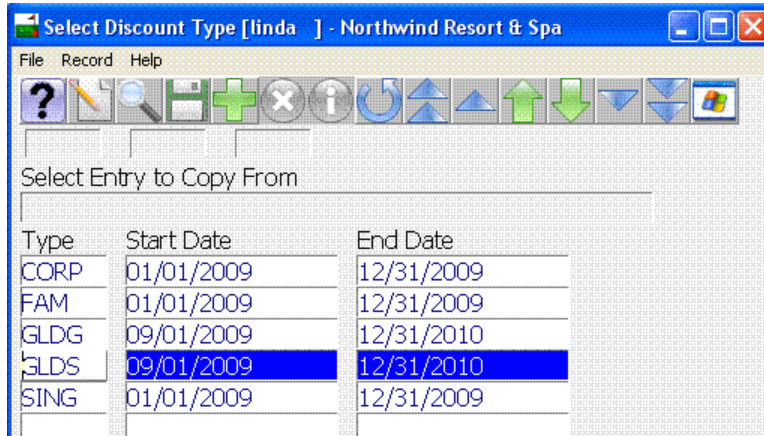
Future Features

Turnstile Entry Maintenance

This option allows Maestro to scan a membership card bar code that will communicate with that club's turnstile / door / gate to open if the membership is valid.

The Open Sequence and other information will be accessed via the software used to open the turnstile / door / gate.
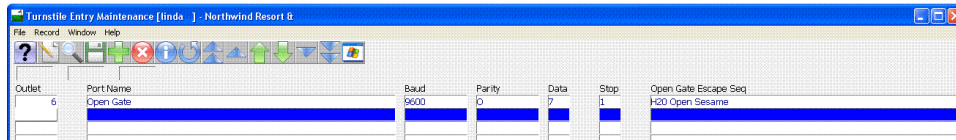
Member Card Layout Files

Key DGN files into the Layout File Name field. These files must exist in the Layout folder in order for the membership card to be created/printed properly.
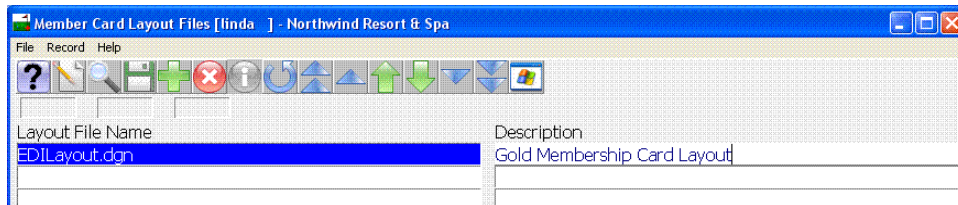
If the files do not exist this entry will not be accepted and a dialog box will appear stating this file does not exist.

Printer / Encode Setup

This option is used by the EPI Card Printer software to configure the Card Printer. If the EPI software is not configured or licensed on the existing workstation, this screen will not open. Instead the following message will appear.
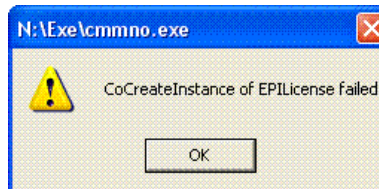
Member Type Privileges Maintenance

This screen allows the user to setup some access privileges for each membership type. For example, one membership type might have access to the tennis courts from 10am to 3pm only while another membership type might have full 24 hour access.

Add the Member Types affected by the privileges maintenance to the Member Type Maintenance screen. See next segment. A Facility Type must also be created prior to completing this screen.
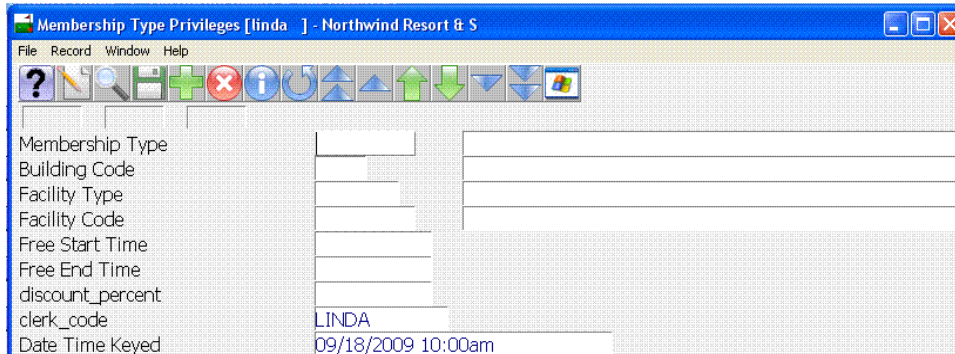
Member Type Maintenance

Create these member types to be used in the membership type privileges screen.

Membership Management

The Membership Profiles can be accessed from two different locations:

- *Spa & Activities Management Menu | Member | Member Profile*
- *Front Desk Menu | Audit | Member Profile*

Membership Profiles can be added or modified at either of these two locations. A Membership Profile cannot be deleted once created. However, a member can be made *Inactive* if necessary.

If the Member already has a Client Profile, a Membership Profile is not required to be created as the Client Profile can be *linked* to the Membership Profile using the same client code.

Creating Member Profiles

From the Spa and Activity Management Module, go to *Member | Member Profile*

> **NOTE:** Prior to creating new member profiles an **F8** or look-up should be performed to ensure that duplicate profiles are not created in the Maestro database.

1. On the *Member Client code* field press **F8**
2. On the Look-up screen enter one or more of the following:

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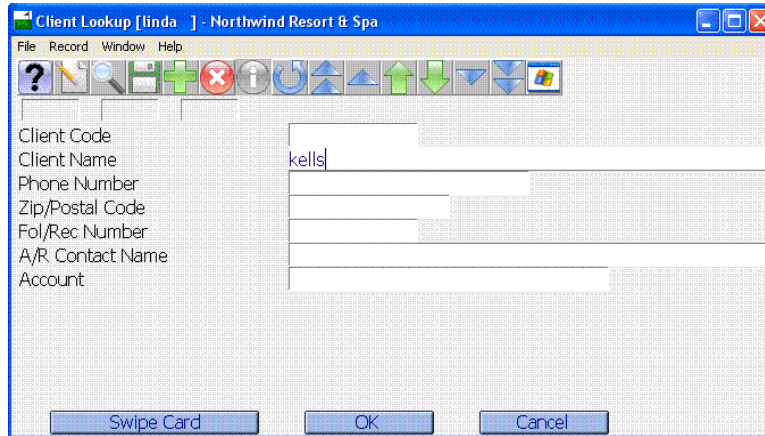
a. The client code number
b. Client name (company name or last name for an individual)
c. Phone number
d. Zip/postal code
e. Folio number
f. A/R contact name
g. Member Account Number

3. Alternatively press *swipe card* and swipe the member's card or select the window menu and manual card entry to type in the card number.

Maestro will display a list of potential matches.

> **NOTE**: *Maestro will display results based on existing members as identified by the yellow field indicator* **Members** *in the upper left hand side of the screen.*
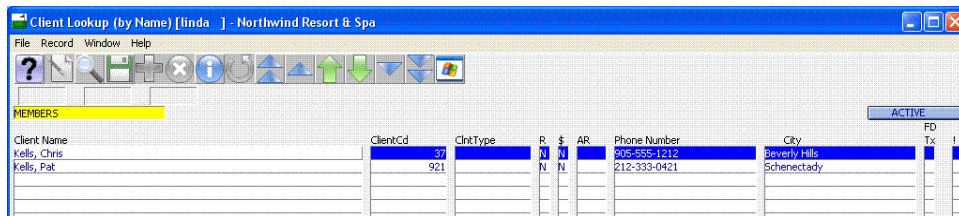
In order to search through all non-member profiles go to *Window | View All clients*. If looking for specific profile types such as companies and groups use this option on the menu. It is possible to display matches based on:
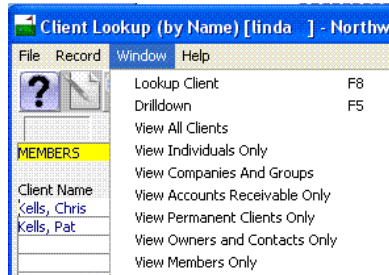
If the client profile is located left click on the client name or arrow down to highlight the client and press enter to select. Otherwise press **F4** to exit from the results if the client profile was not found

At this point the user can **F6** to create a new *Member Profile*

| Option	Description
Member Client Code	**F8** or Look-up existing clients/members or **F6** to create new members
Account Status	Defaults to Active. Change to Inactive by selecting *Window | Member Address | Window | Toggle Active/Inactive Status*
Member Name	Client name. The client maintenance screen can be accessed from *Window | Member Address*
Member Status	**F8** to select *Member Status*. Created during Member Setup
Member Account Number	Alphanumeric Field to record the account number from a legacy system. **NOTE:** *This field is currently not searchable*
Member Type Code	**F8** to select a member type
Member Group	**F8** to select *Member Group*. Created during Member Setup
Discount Type	**F8** to select a discount type that applies to this member
Minimum Code	**F8** to select the minimum spend code for this member
Charging Privileges	**F8** to select whether this member can charge back to their Member profile or not
Text	**F5** or Drill-down to add text about this member
Join Date	**Key** the date the member joined. **F8** to access a calendar **NOTE**: *If the date is for the current year Maestro will pro-rate the minimum spend*
Expiry Date	**Key** the membership expiration date. **F8** to access a calendar
F&B Consumed	Populates based on how much the Member has spent if a Minimum Code has been attached to this profile.
Outstanding	Populates how much is remaining to be spent on the Member's minimum spend
Credit Limit	**F8** to select a Credit limit to extend to the member. Credit limits are modified in the AR maintenance module (refer to the AR user guide). A credit limit must be established before interface charges can be posted to the Member's profile
Late Payments	**F8** to select the appropriate late payment schedule to charge interest on outstanding member balances. **NOTE**: *Late payments are setup in the AR Maintenance Module (refer to the AR User Guide)*
Daily Statements	Not currently in use

Statement Copies	When running Member statements – **enter** the default number of statements to be generated for this owner
Invoice Copies	When running member Statements with Invoices - **enter** the default number of copies of folios to be generated for this owner
Automatic Apply	Once receipts are received if set to *Y* the receipt will automatically pay off the most aged debt on the member's profile
Current Balance	Displays the current amount owing on the Member's Account. **F5** to access those charges

Member Profile Window Menu

Invoice Management

Accessed from the *Member Profile | Window*, this has the same functionality as in Maestro's A/R module.
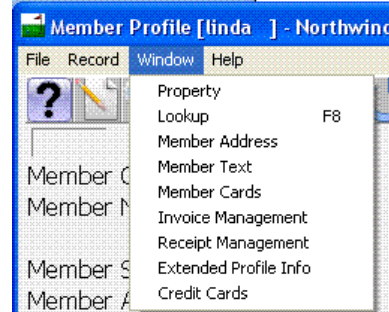
Access to Folio Header Entry / View

- From the Member Profile screen, **F8** to locate the *Member Profile* account.
- Once displayed, from the Current Balance field, **F5** or right Click to go into *Folio Header Entry/View* screen
- OR
- Go to *Window | Invoice Management* to go into the *Folio Header Entry / View* screen
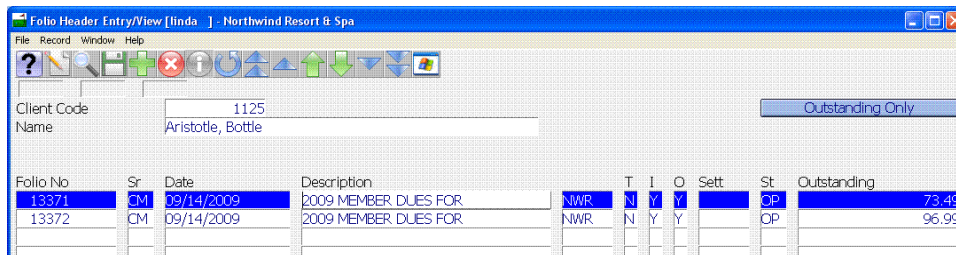
Manually Create a New Folio

- Press the Create icon or **F6** to create an invoice header.
- The Folio number, source, description and date will automatically be defaulted.
- You may override the *description* as required.
- Press **Enter** past the following fields: T, I, O, Sett to the next line.
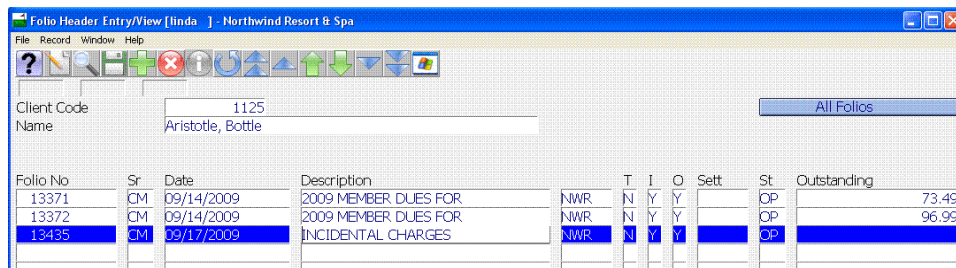
Manually Post a charge / Post a Payment

- Folio Detail Entry/View screen will automatically be displayed,
- Press the *Create* icon or *F6* to start posting.

- System will default to today's' date under the Date Eff column.
- Press *Enter* to accept date displayed or enter a date when you want this posting to be reflected (only authorized personnel will be allowed to enter a back posting transaction).
- *Key* a valid posting code or press *F8* to display posting codes lookup, *Click* on the posting code you wish to use, press *Enter*.

> *NOTE: Select* a charge posting code to post a charge, i.e. GOLF for Golf Fees. ***Select*** *a settlement posting code to post a payment, i.e. CK for Check. A Charge posting code will take the user to the Charge column to input the amount of the charge. A Settlement posting code will take the user to the Payments column to input the amount of payment.*

- *Key* a reference number under the *Voucher* number if necessary but not mandatory
- *Key* the amount under the *Charge/Payments* column and press *Enter*.
- If the posting code entered is configured to automatically add the taxes, Maestro will display all posting lines.
- You can create an unlimited number of postings for this folio.
- The *Posted Charges* and *Posted Payments* fields will increment as amounts are entered.
- After posting is completed, *F4* twice to return to the *Member Profile* screen.

> *NOTE: Value of current balance field*

Receipt Management

Accessed from the *Member Profile | Window*, this has the same functionality as in Maestro's A/R module.

There are two components in receipt management:

1. Receipt creation
2. Reconcile receipt(s) with outstanding folio(s)

Receipt Creation

- From the Member Profile screen, once a member account record is displayed, select *Window | Receipt Management.*

- *F6* to create a receipt and a *Receipt Creation* screen will be displayed.

- *Key* the settlement posting code, or press *F8* and select the correct settlement posting code.
- *Key* a reference in the *Check/Reference* field for the receipt or leave it blank*.*
- Maestro defaults the payer name or enter name if payer is different from the Member Profile.
- *Key* the bank name or leave blank.
- *Key* the amount of the receipt/payment and press *Enter*.
- System will default today's date or enter date in the future to handle post-dated payments.

> **NOTE**: *Post-dated checks will not be reported until Date Effective is reached. You may also key in a past date if the payment was received prior to the date of entry. System will automatically default the Date Keyed field and cannot be changed by the user.*

System will automatically display the previous screen.
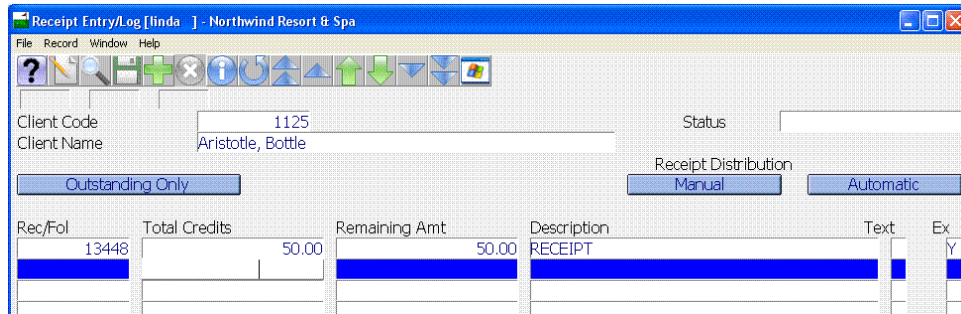
Reconciling Receipts with Outstanding Folios

There are two ways to reconcile receipts:

1. Manual, or
2. Automatic

Manual Reconcile – is used to manually reconcile payment to a specific invoice/folio. Or distribute payment (full or partial) to pay multiple folios.

Automatic Reconcile - will automatically reconcile payment to the oldest invoice/folio of the Member account. This method is widely used for credit card accounts.

1. Manual Reconciliation

- From the *Receipt Entry/Log* screen, select the outstanding receipt folio to reconcile.
- *Click* the *Manual* button, and Maestro will display the *Receipt Application Selection* screen.
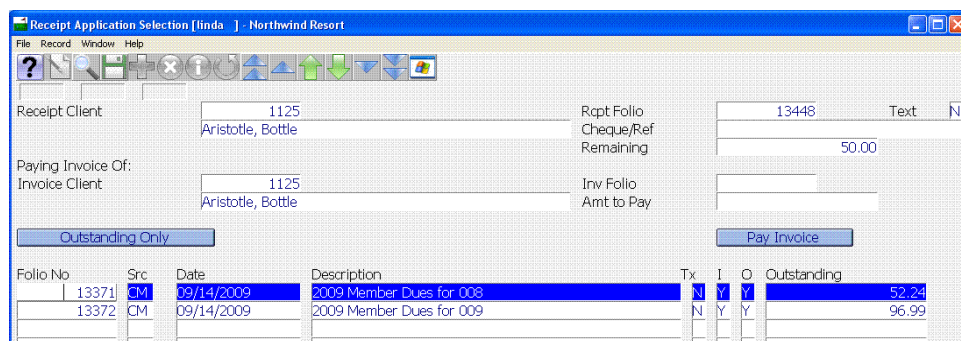
If paying in full:

- **Select** the outstanding folio to reconcile
- **Enter** and input the amount to pay if different than what defaults
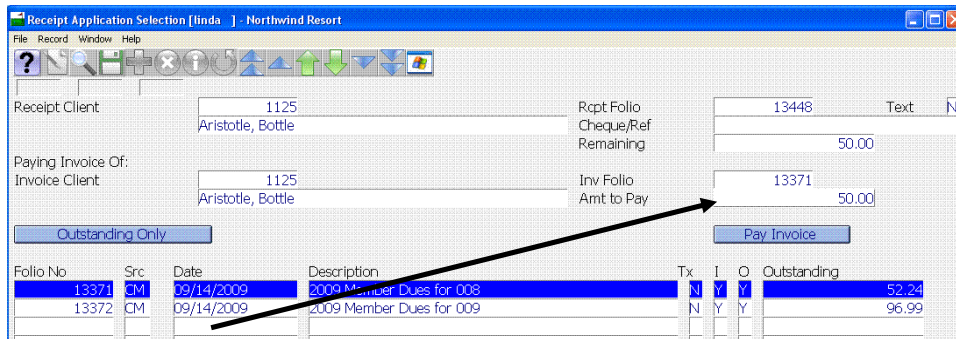
- **Select** the *Pay Invoice* button
- Maestro will now return to the previous screen and the receipt folio is cleared from the outstanding *Receipt Entry/Log* screen
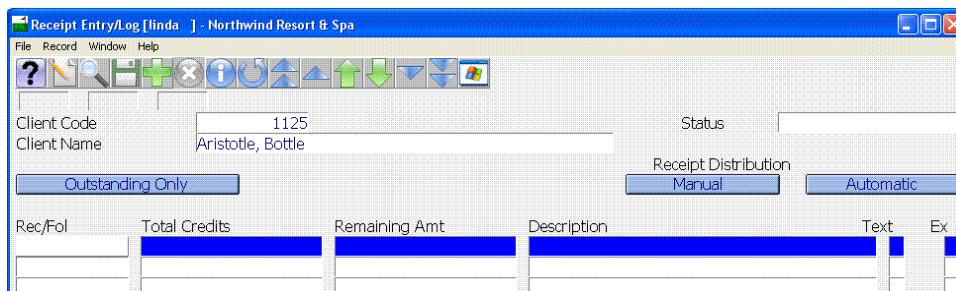
- **F4** back to the Member Profile screen

If paying partially:

- From the Member Profile*, Click* on the outstanding folio to reconcile, then **Enter** or **Double Click**
- **Key** the partial amount in the *Amt to Pay* field, and *Enter*
- Maestro will debit amount from the invoice selected
- **F4** to return to previous screen. *Receipt Entry /Log* screen will show the remaining amount on the receipt folio
- **F4** to return to *Member Profile* screen

2. Automatic Reconciliation

- From the *Receipt Entry/Log* screen, **select** the receipt folio to reconcile.
- **Select** the *Automatic* button
- Maestro will clear the receipt folio entry
- The amount will be automatically applied to the oldest outstanding invoice/folio for this Member Profile account.
- **F4** to return to the *Member Profile* screen.

More Member Profile Window Options

Other than Invoice and Receipt Management, there are several other options to be aware of within the Member Profile window menu.

Member Address

To edit, modify or add new information to the Member Profile demographics, from the *Member Profile* select *Window | Member Address*

Make changes and then *F4* to save and return to the *Member Profile* screen.

Toggle Member Active/Inactive

From within the Member profile the user can toggle the member status from Active to Inactive, *Window | Member Address | Window | Toggle Active/Inactive*, you can select this option to make a Member Inactive or reactivate them.

By making a Member inactive they will no longer have the ability to charge items back to their member profile.

Tax Exemptions

To make the Member exempt from paying specific taxes go to Member Profile | Window | Member Address | Window | Tax Exemptions. F8 to select the tax the member is exempt from and input a short reason why.

Credit Cards

From the Window menu in the Member Profile, you can add a credit card to the Member to be used for EFT processing. Please refer to the EFT QRG for more information.
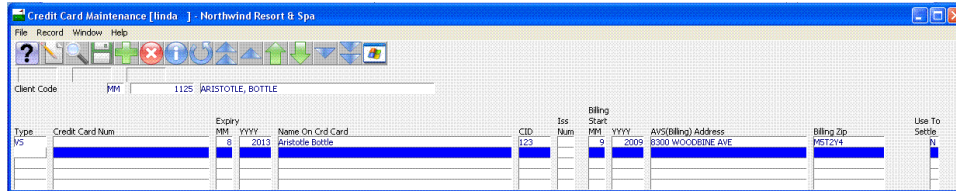
Member Cards

From the window menu in the Member profile screen select *Member cards.* This screen can be used to associate a swipe card with the member profile. Once a card has been associated with a member it can also be toggled inactive via the window menu. Card numbers can also be deleted by pressing the **F7** key on the highlighted card
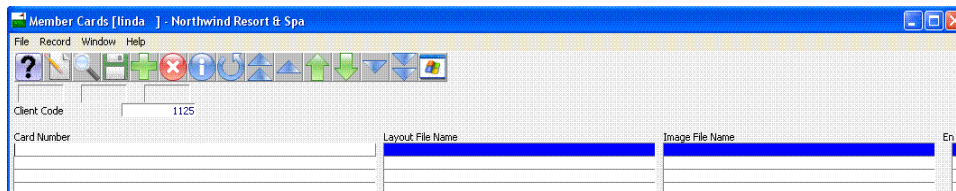
To add a card press **F6** to add a swipe card to the member.

> **NOTE:** Multiple cards can be associated with one member profile. When entering a new card at the swipe card screen select the window menu and manual entry to key in a card number rather than swiping a card.

Extended Profile Info

This screen can be used to track other information about the member. For example, Locker number, membership type, renewal date, special notes or instructions.
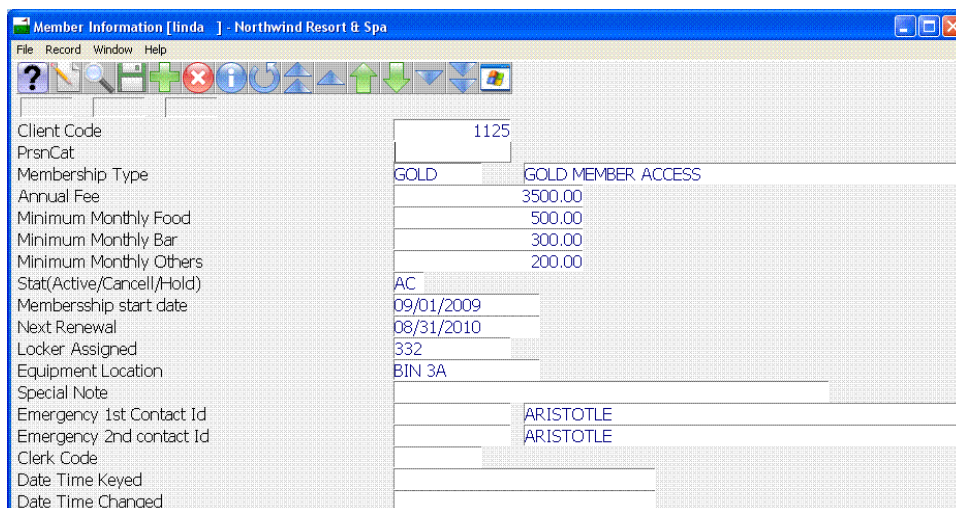
Membership Maintenance

Posting Member Dues

To run the automatic post member dues program -
from the Spa and Activity Management Menu,
select *Member | Post Member Dues*
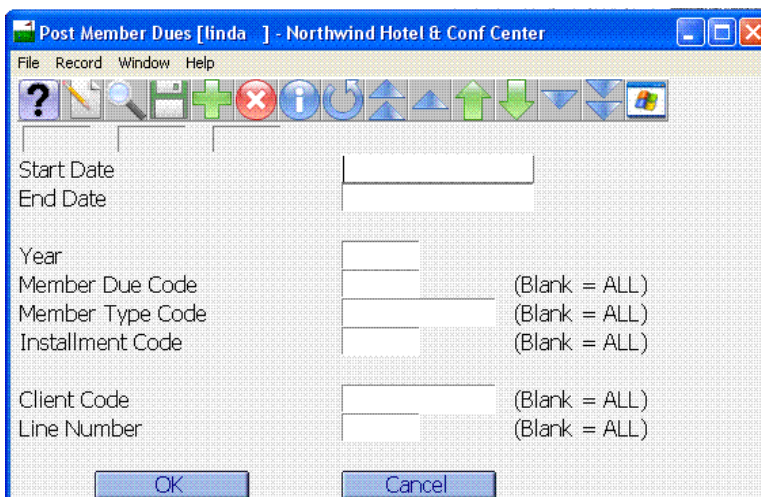
Option	Description
Start date	*Key* the start date of the Member dues period
End date	*Key* the end date of the member dues period
Year	*Key* the year the Dues are for
Member Due code	To run a particular member due *key* or *F8* to select the desired dues. Leave blank to run for all dues to post
Member Type code	To run dues for a specific member type *F8* or *key* the code. Leave blank to run the dues for all member types
Installment Code	*Key* or *F8* the specific due installment to be posted. Leave blank to run dues for all installments *(not recommended)*
Client code	*Key* or *F8* a specific client to run dues for just this member
Line number	If there are multiple lines for each installment – enter the specific line number that should only be processed or leave blank for all

Member Dues can be run in two different ways.

1. **Post Monthly Dues for the past dates**: For example on September 1st: Start Date: August 1, End Date: August 31. Installment code = 008 for August. Line = 10 if only one installment code for the month.
2. **Post Monthly Dues for the future dates**: For example on September 1st: Start Date: September 1, End Date: September 30. Installment code = 009 for September. Line = 10 if only one installment code for the month.

For Bi-Monthly Member Dues Posting:

1. **Post Bi-Monthly Dues for the past dates 1st half of the month**: For example on August 16: Start Date: August 1, End Date: August 15. Installment code = 008 for August. Line = 10 for the month's first installment code
2. **Post Bi-Monthly Dues for the past dates 2nd half of the month**: For example on September 1. Start Date: August 16, End Date: August 31. Installment code = 008 for August. Line = 20 for the month's second installment code
3. **Post Bi-Monthly Dues for the future dates 1st half of the month**. For example on August 31. Start Date: September 1, End Date: September 15. Installment code = 009 for September. Line = 10 for the month's first installment code
4. **Post Bi-Monthly Dues for the future dates 2nd half of the month**: For example on September 15. Start Date: September 16, End Date: September 30. Installment code = 009 for September. Line = 20 for the month's second installment code.

Member Statement

Statements for each member can be generated by accessing Member statement from the Member menu.
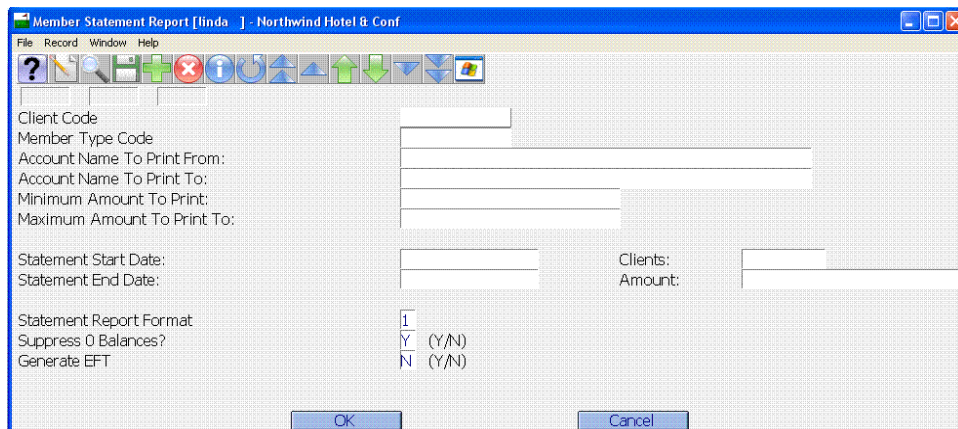
Member statements can be run for the following criteria:

Option	Description
Client Code	*F8* to locate a client code for a single member to run a statement for
Member Type Code	*F8* or *Key* a particular member type to run statements for all members associated with this member type
Account name from and to	To run statements for an alphabetical range of members. To print all statements *key* an '*A*' in the *Name to Print From* and a '*Z*' in the *Name to Print to*
Minimum/maximum amount to print	*Key* a numerical range for all statements with a balance in this range to print. Statement will default to -999,999,999 – 999,999,999
Statement start/end date	*Key* the statement period. Will default to last month based on the current date.
Clients/Amount	These fields will auto-populate with the number of clients and the total amount selected
Statement format	If using the Maestro statement – enter either 1 or 2 to display the desired statement. For crystal statement users leave this field as "1"

Suppress 0 Balances	If "Y" only print statements for clients with a balance. If "N" print statements for all clients regardless of whether the statement has a balance
Generate EFT	Generate EFT with statement (Refer to EFT QRG)

Member Aging Report

Aging can be reported for Members. The aging report is found in *Member | Aging Report*.

> *NOTE: The Aging options are established in Spa & Activities Maintenance | Setup | System Options | Age Payments | Y/N and can be changed on the fly.*
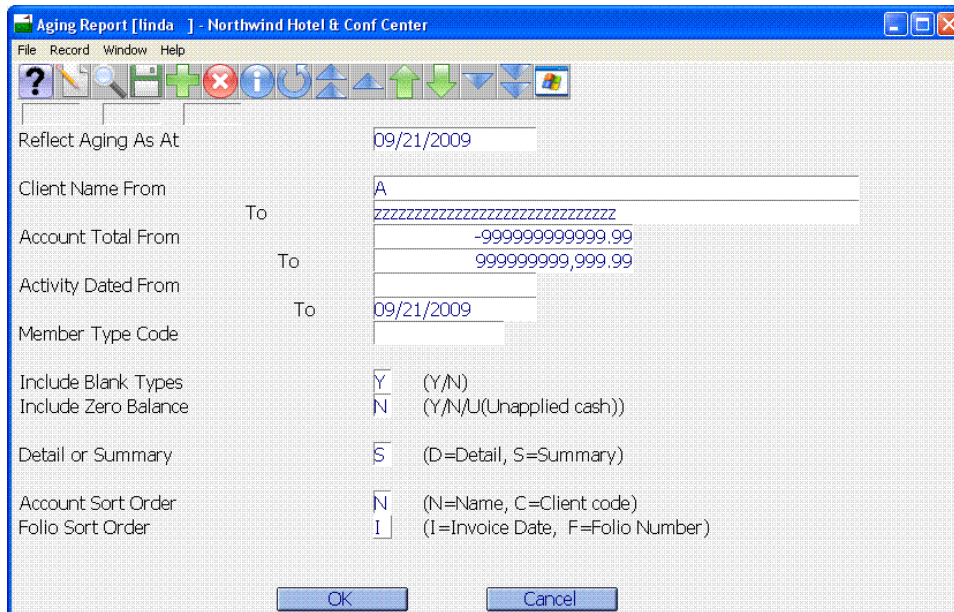
The aging report can be run for the following criteria:

Option	Description
Reflect Aging As At	*Key* the date to base aging on
Client name from & to	*F8* to find an existing member or *key* a range of members to run the aging report for, i.e. A - Z
Account total from & to	*Key* a numerical value to generate the aging report based on members with a balance in this range
Activity dates from & to	*Key* a date range during which the charges are to be included
Member type code	*Select* a member type to run the aging report for or leave blank for all
Include blank types	Include members that have a zero balance
Include Zero Balance	*Y / N/ U* (for Unapplied Cash)
Detail or Summary	Detail displays aging for each folio associated with the member. Summary displays a total for the member
Account sort order	Order the report by client code number or

	name, **C or N**
Folio Sort order	Sort folios per member by Invoice date or Folio number, **I or F**


```
print.lbattell.txt - Notepad
File  Edit  Format  View  Help
09/21/2009 04:56pm CM7400      Northwind Resort & Spa                    Page    1

Printed As At: 09/21/2009                          Summary Aging Report
G/L Property:

Include $0 Bal:No                                  Include BackDated:   Yes

                          Name Range From:                    To   ZZZZZZZZZZZZZZZZZZZZZZZZZZZZZ
                          Amount Range From: -999999999999.99   To   999999999,999.99
                          Date Range From:                     To   09/21/2009
                          Member Type:

Client                    Client Cd. Type          Client total Current amount   30 day amount   60 day amount   90 day amount   120 day amount

Anstead, Terry                  35                     2,843.50     2,843.50
Aristotle, Bottle              1125                       99.23        99.23
Battell, Miss Linda             783                     2,349.85     2,219.72        130.13
Bob, Jim                       1091                       889.65       889.65
Carefoote, Kelly                792                     3,020.93     2,792.00        112.03          116.90
Crosbie, Mr Douglas             301                       959.00       415.80                                        489.25           53.95
Curtis, Rayna                  1097                     1,877.40     1,877.40
Fung, Hank                      764                       530.40       103.95        156.25          270.20
Halliday, Doc                    83                     3,385.71     2,985.70        233.01                                          167.00
Kells, Chris                     37                       576.95       576.95
Kells, Pat                      921                     2,985.70     2,985.70
Kelly, Mark                    1051                       207.90       207.90
Mckechnie, Stuart               787                     3,919.80     3,919.80
Minten, Terry                   505                       542.85       542.85
Moya, Atoy                     1039                       417.90       417.90
Renzulli, Anthony              1096                       312.90       312.90
Tikhomirov, Dmitry             1095                       123.90       123.90

Report Totals                                          25,043.57    23,314.85        631.42          387.10          489.25          220.95
% of Total                                                100.00        93.10          2.52            1.55            1.95             .88

end of report
```

Expired Membership Report

Accessible via *Member | Membership Reporting,* two reports can be accessed from this menu – The *Expiring Member report* and *Member Usage report*. Once Membership reporting has been selected in the report type field *F8* and either the Expiring or Usage reports can be selected for running.

The report can be run and the results filtered by the options on the screen depending on the desired result. Note that this report can be used to forecast memberships which are due to expire or have expired.

Maestro
PMS like no other.

Member Usage Report

The member usage report can be run to show what members are actively using facilities based on the information obtained via the swipe cards each member carries.

> **NOTE**: *Similar options are available for this report to be run and sorted when compared with the membership expiration report.*

Two additional options are included on the usage report which allows the entry of a date range to analyze the members' usage.

Member Admission

The member entry screen records certain information about a member when they use their swipe card to access service within one or multiple outlets. The information recorded is:

- Date & time in
- Card number
- Member name
- Membership type
- Privilege – i.e. can the member charge items back to their member profile
- The expiration date of the membership
- The status of the member (active or inactive)

From the window menu select swipe card to record that a member is accessing services at a particular outlet. Also available is a manual entry from the member swipe card screen, *Window | Swipe Member*.
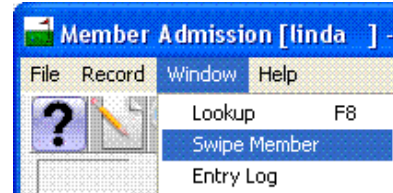
An entry log is kept for all members which, can be accessed from the window menu. Select one or more of the following criteria to view the member usage:

- Outlet
- Membership number
- Member type
- Start date
- End date

Expiring Credit Card Report

Print this report to determine Member credit cards that are expired or approaching their expiry dates. This report can then be used to contact the members if they have EFT payments automatically debiting their credit cards via Maestro Club Membership.

Member EFT Inquiry

This is a quick way to determine what charges have been posted via the clients credit cards via the EFT – Electronic Funds Transfer option that Maestro provides.