

# Membership Application and Renewal

## Overview

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### Introduction

This full document outline the different procedures for new membership applications and membership renewals throughout the annual membership year. Assuming the year is 17/18, the annual membership year covers 31/05/2017 - 31/05/2018, even if the member is signing up in January 2018.

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### Before you begin

Ensure you have read and understand the Membership types & fees (this document can we found on the last page). Would refer to it as an Appendix.

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### Document content

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### Target Audience

This document is for all Sydney Flying Squadron employees. We believe any member of staff should be able to assist with membership.  
Bar staff, Restaurant staff, Restaurant Manager, Bar manager, Events Sales Manager.

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### Responsible for these procedures

SFS Office Manager

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## Membership Renewal – At the Club

**Introduction** These instructions describe the steps to take to renew a member’s membership at the club.

**Timing** This procedure should take place every time a member asks to renew their membership at the club.

**Before you begin** Before you begin, make sure you  
Turn on the reception computer  
Log into the membership system (on the desktop)

**Note:** The membership system password is 134679

**Process**

Follow the steps in the table below to renew a member’s membership at the club.

Step	Action										
1	Ask the member for their last name										
2	Click ‘Member details’, then click ‘Find’										
3	Type in their last name into the ‘Surname’ field, then hit ‘Select’										
4	Follow the table below to guide you through the system to find the correct membership card. <table border="1" data-bbox="523 1104 1343 1695"> <thead> <tr> <th>If the membership screen has</th> <th>Then...</th> </tr> </thead> <tbody> <tr> <td>Opened up their full membership card</td> <td>Go to step 5</td> </tr> <tr> <td>Shown a list of members with the same last name</td> <td>Scroll the list until you find the last name which has their first name. Double click the name to open up their contact</td> </tr> <tr> <td>No result found after searching last name</td> <td>Delete the last name, Type their first name into ‘Preferred name’ field. Scroll this list of names until you find their last name, Double click the contact</td> </tr> <tr> <td>No results found after searching first name</td> <td>Repeat the step above but put their first name into the ‘Preferred name’ field or search membership number</td> </tr> </tbody> </table>	If the membership screen has	Then...	Opened up their full membership card	Go to step 5	Shown a list of members with the same last name	Scroll the list until you find the last name which has their first name. Double click the name to open up their contact	No result found after searching last name	Delete the last name, Type their first name into ‘Preferred name’ field. Scroll this list of names until you find their last name, Double click the contact	No results found after searching first name	Repeat the step above but put their first name into the ‘Preferred name’ field or search membership number
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## Membership Renewal – At the Club, Continued

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**Process (cont)**     **Note:** On the odd occasion that a member cannot be found on the system after a lengthy search, we need to set them up from New again.

5	Check you are looking at the correct contact i.e. ask for postal address check
6	Update the 'Paid to date' to 31/05/2018
7	Update the 'Receipt date' to today's date (of the payment taken)
8	Click 'Update' – to save the updates
9	Take payment via card or cash
10	Print the renewed membership card (Refer to section below called How to print a membership card)
11	Give the new membership card to the member

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## New Membership Application – At the Club

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**Introduction** These instructions describe the steps to take in person to process a membership application at the club.

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**Timings** This procedure should take place every time a visitor asks to become a member of the club.

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**Before you begin** Before you begin, make sure you ensure we have paper application forms printed (they are located on the sign in desk). More paper applications can be printed from the SFS Office Manager or from the website. Ask the member to complete the paper application form. If they are applying for Sailing membership, they have the option of going out for their three free sails before joining, to ensure they like it. If they want more information they should be directed to Coral Taylor

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**Process application fully** Follow the steps in the table below to fully process a new membership application at the club. This procedure should happen when a staff member has 5 minutes available to assist with the full new membership application procedure.

Step	Action
1	Ask the new member to complete the paper application form
2	Take the payment via card or cash on the day or they can add their card details to the form, which you can charge through the card machine by entering card details manually.
3	Click 'Member details', then click 'New'
4	Populate <b>all</b> details from the form onto their membership card, use the different tabs i.e. main, contact info, preference.
5	Update the 'Paid to date' to 31/05/2018
6	Update the 'Receipt date' to today's date (of the payment taken)
7	Click 'Update' – to save the updates
8	Print the renewed membership card (Refer to section below called How to print a membership card)
9	Give the new membership card to the member

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**Notes** If you do not know how to process a payment through the card machine by entering the card details manually. Please ask a manger, i.e. SFS Office Manager or Events Sales Manager.

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## New Membership Application – At the Club, Continued

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rocess  
application  
partially

Follow the steps in the table below to partly process a new membership application at the club.  
This procedure should happen only when a member asks to join and all staff are unavailable to complete the full new application procedure.

Step	Action
1	Ask the new member to complete the paper application form
2	Take the payment via card or cash on the day or they can add their card details to the form, which you can charge through the card machine by entering card details manual.
3	Write on the paper application that the payment has been taken, note the authorisation number from the receipt
4	Let the member know that once the SFS Office Manager is next in; The application will be processed The membership card will be printed They will be notified to come and collect it
5	Leave the membership application on the SFS Office Managers desk.

**Note:** The SFS Office Manager will then follow Steps 3-8 from Procedure 1, and contact the member.

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## New Membership and Renewals - Online

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**Introduction** These instructions describe the steps to take to process an online membership renewals & membership application.

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**Before you begin** Before you begin, make sure you

- Turn on the reception computer
- Log into the membership system (on the desktop)

**Note:** All online memberships have already made payment.  
The membership system password is 134679.  
All confirmation emails of the online renewals & applications are emailed to the SFS Office Manager from the SFS website.

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**Process** Follow the steps in the table below to process the new online membership renewals & membership application.

This procedure should happen every couple of days as the confirmation emails come in.

Step	Action
1	Print the confirmation emails of the online renewals & new applications
2	Split the pile into renewals and new membership applications (start with the renewals first if there is any)
3a	Renewals – Follow steps 2-8 and step 10 (not step 9), from the ‘How to renew a members membership at the Club’ procedure.
3b	New membership applications – Follow steps 3-8 from the ‘How to process a new membership application at the club’ - Procedure 1.
4	Contact the member by their email to say the membership card is ready for collection

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**Email template** **Title:** Membership card ready for pick up from Sydney Flying Squadron  
**Email body:** Dear (insert members name),  
Thank you very much for your online membership renewal/application.  
I have now processed this for you and printed your new card.  
As we are no longer posting out membership cards, the card will be ready for you to pick up from the Club reception desk next time you visit.  
Many thanks  
(Sign off – your name)

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## Printing a Membership Card

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**Introduction** This section outlines the procedure for printing membership cards

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**Before you begin** Before you begin, make sure you

- Check the card printer is turned on
- Open the 'Print Card' Programme which is on the desk top of the Reception desk

**Note:** The spare membership cards for the printer are under the desk.

Any issues with the printer not working or printing;

- 1) Check it has membership cards in it
  - 2) Turn the machine on and off
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**Process** Follow the below steps in the table to print a new membership card

This procedure should happen every time a staff member processes a membership renewal or new membership application at the club. Also by the SFS Office Manager when they are processing the online renewals and online new membership applications.

Step	Action
1	Copy their membership number from the membership system
2	Open the programme 'Print Card'
3	Copy and paste their membership number into the top box. Check all details are correct.
4	Click the Tab button and their details should appear
5	Click print and select the printer called – XOS Card printer
6	Hand the printed card to the member

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## Map Title

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### Introduction

This section outlines the procedure for members picking up their membership cards

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### Before you begin

Before you begin check

- Go to the reception desk
- Locate the membership cards under the desk

**Note:** If you do not find it in the box, the online application may not have been processed yet. You can print the new card and leave their name with Jess to check payment was made.

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### Process – Picking up a card

Follow the below steps below to locate the members printed membership card. This procedure should take place when a member comes to the club to pick up their membership card.

Steps	Action
1	Locate the membership cards in the A-Z boxes under the reception desk for collection
2	Ask the member for their last name and pull out that box

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## Document History

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Number	Author	Notes
1.0	Jessica Hayton	SFS Office Manager

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Version	Date	Changes
1.0	1/12/2017	Initial

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