

Proshop Tee Times – How to Member Charges

Proshop Tee Times can be configured to allow Member Charges in two ways. You can allow specified contacts to have a CONTACT BALANCE, or you can setup a Member Account. A Member account can be associated with multiple contacts. You will need to use the MEMBER ACCOUNT method if:

1. You want multiple family members to share a common balance

Or

2. You want to setup monthly minimums

Or

3. You want to send monthly statements

Or

4. You want to store card information for future billings

If you just want to allow individuals to carry a balance, then the best method is using CONTACT BALANCES instead of MEMBER ACCOUNTS.

There is an additional charge if you decide to use MEMBER ACCOUNTS because it generates additional support. There is no additional charge for the CONTACT BALANCES method.

Contact Proshop Tee Times support to setup either method.

How to Use Contact Balances

When CONTACT BALANCES are enabled for your course, than your contacts will be able to prepay, then charge against their balance. If you want to allow contacts to carry negative balances, you can edit the contact and click on the CAN CHARGE checkbox. To allow a contact to charge, edit the contact profile as normal and check the CAN CHARGE checkbox at the bottom of the profile tab.

Contact

Contact Profile | Contact Groups | Picture | Reports

First Name: Jay
Last Name: Snider
Phone: 5025926413
Cell Phone: 5025926413
Email:
Send Emails:
Contact Type: Guest
Birth Date:
Address:
Zip Code:
Notes:
Warning:
Password: ****
Balance: \$0.00
Can Charge:

Contact Groups: Southwest

Member Credit Report

To charge against the CONTACT BALANCE, start a sale as normal.

Discount: 0 | Taxable: | Member:
Notes:
Customer: Snider, Jay

	Description	Qty	Unit Price
Edit	Grass-Jumbo	1	\$11.00

Select the contact by clicking on the contact lookup button next to the Customer Name field. Add items to the sale and click on CHECK OUT as normal. The check out screen will show a form of payment called ACCOUNT.

cAsh	0	00	\$20	\$10	\$5
cCredit card	0	00	<input type="checkbox"/> Manual Entry		
Gift card	0	00			
Account	0	00	Member ID	420635	
			Balance	\$0.00	

You can bill to the ACCOUNT if their balance is greater than the amount due or if the contact is setup to allow negative balances.

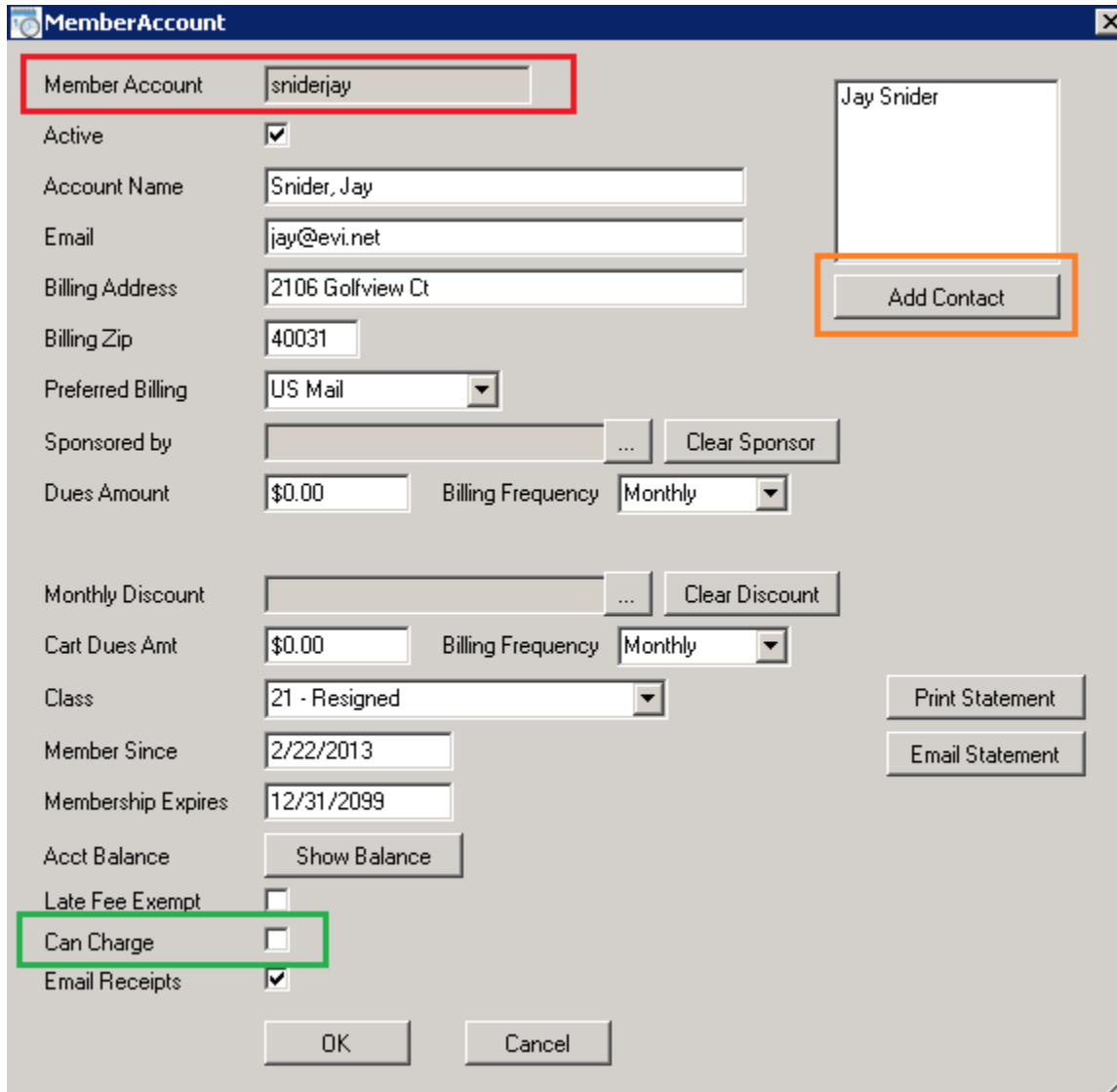
To apply a payment to a contact, start a sale as normal and specify the contact like we did when charging against the account. Add the ACCOUNT PAYMENT item to the sale and specify the amount of the payment. Click on CHECK OUT and specify the form of payment (Cash, Check, Credit Card).

Contact Account Reports

To get a list of all account with balances, go to REPORTS, ACCOUNTING tab, and click on CONTACT ACCOUNT BALANCES. To see a contacts account transactions, edit the contact profile, click on REPORTS tab, then click on CONTACT ACCOUNT TRANSACTIONS. To get the CONTACT ACCOUNT TRANSACTIONS report for all contacts, go to REPORTS, POS tab, and click CONTACT TRANSACTIONS.

How to Create a Member Account

Click on ADMIN MENU, MEMBER ACCOUNTS and click on ADD MEMBER ACCOUNT.



The screenshot shows a web form titled "MemberAccount" with the following fields and controls:

- Member Account:** Text input field containing "sniderjay", highlighted with a red box.
- Active:** Checkmark
- Account Name:** Text input field containing "Snider, Jay".
- Email:** Text input field containing "jay@evi.net".
- Billing Address:** Text input field containing "2106 Golfview Ct".
- Billing Zip:** Text input field containing "40031".
- Preferred Billing:** Dropdown menu set to "US Mail".
- Sponsored by:** Text input field with a "..." button and a "Clear Sponsor" button.
- Dues Amount:** Text input field containing "\$0.00".
- Billing Frequency:** Dropdown menu set to "Monthly".
- Monthly Discount:** Text input field with a "..." button and a "Clear Discount" button.
- Cart Dues Amt:** Text input field containing "\$0.00".
- Billing Frequency:** Dropdown menu set to "Monthly".
- Class:** Dropdown menu set to "21 - Resigned".
- Member Since:** Text input field containing "2/22/2013".
- Membership Expires:** Text input field containing "12/31/2099".
- Acct Balance:** Text input field with a "Show Balance" button.
- Late Fee Exempt:** Checkmark
- Can Charge:** Checkmark , highlighted with a green box.
- Email Receipts:** Checkmark
- Buttons:** "Add Contact" (highlighted with an orange box), "Print Statement", "Email Statement", "OK", and "Cancel".
- Preview:** A box on the right shows "Jay Snider".

Enter a unique **Member Account**. This can be a name, phone number, or any value.

Click **ADD CONTACT** to specify which contacts make up this account.

Enter an Account name. This can be more descriptive than Member Account, especially if you used a phone number or account number.

If your course offers sponsor discounts, select the sponsoring member.

If you want this account to be able to charge, check **CAN CHARGE**.

If you want the member to get a receipt every time a transaction is posted to their account, click

EMAIL RECEIPTS.

You can Print and Email Statements.

Depending on your credit card processor, we can also setup automatic reoccurring billing. Contact support if you are interested in this option.

How to charge against a member account

Start a sale as normal. On the sales screen (on the top right, click on the button to the right of CUSTOMER) and select the person purchasing these items.

The screenshot shows the SaleFood POS interface. At the top, there are menu categories: Item Groups, Golf/Carts, Merch, Membership, Food Menu 1, and Food Menu 2. Below these are item buttons for Candy (\$1.50), Chips (\$1.50), Crackers (\$1.50), Snacks (\$1.50), Bottle Soda, Lg. Gatorade (\$2.00), and Bottled Water, Sm. Gatorade. On the right side, there is a form with fields for Report Date (5/6/2016), Update Hotkeys, Discount (0), Taxable (checked), Member (unchecked), Customer (Snider, Jay), Notes, and Server (39). A red circle highlights the Customer field. Below the form is a table with columns for Description, Qty, and Unit Price. The table contains one row: Snacks, 1, \$1.50. At the bottom right, there are buttons for Cancel Sale, Save Pending, Check Out, and Print Bill, along with a summary of Sub Total (\$1.50), Tax (\$0.00), Total (\$1.50), and Status (Pending Sale).

Description	Qty	Unit Price
Snacks	1	\$1.50

Select the items as normal, then click on CHECK OUT.

CheckOut

Amount Due \$1.50

cash 0.00 \$20 \$10 \$5 \$1

check 0.00 Check #

credit card 0.00

Gift card 0.00

Member Tab 0.00 Member ID Snider, Jay Family

Split Payment

Total \$0.00

Change \$0.00

Print Receipt

OK Cancel

If you selected a customer on the sales screen that is tied to a MEMBER ACCOUNT that is allowed to charge, then you will see the MEMBER TAB as a check-out option. To charge against the member account, select MEMBER TAB and click OK.

How to Apply a Payment to a Member Account

Start a sale as normal, and select the customer the same way you did when charging to their account. When on the SALES SCREEN, start typing "ACCOUNT PAYMENT", and select ACCOUNT PAYMENT from the items list.

Enter the value of the payment in the ACTUAL PRICE field. Notice the ACCOUNT # field shows who the payment is for.

Check out as normal, and specify the form of payment (normally Check). When paying with check, you may want to enter the check number.

How to Make Adjustments to a Member Account

Adjustments are made the same way as payments, except you select ACCOUNT ADJUSTMENT instead of ACCOUNT PAYMENT from the item list. The big difference is a \$1 payment means the customer will owe \$1 less. A \$1 adjustment means they will owe \$1 more. To reduce the amount they owe, enter an negative adjustment amount.

How to Send Monthly Statements

If you have some people that want statements emailed and others have statements mailed via USPS, you will have to do two steps.

From the teesheet, click on ADMIN MENU, then click on END OF MONTH TASKS. If you have members that you setup to pay monthly dues, click on the BILL MONTHLY MEMBERSHIP DUES. The same is true for annual billing, except you click BILL ANNUAL MEMBERSHIP DUES.

To print statements for people that want them mailed via USPS, click on PRINT USPS STATEMENTS. For the date range, click on LAST MONTH. It may take a couple minutes for the statements to generate.

To email statements, click on EMAIL STATEMENTS. The system will give you an estimated time it will take to process. This can take over an hour if you have hundreds of members.

Every course is different when it comes to Member Billing. We have a lot of hidden "features" that make sense for one course or another. If you need your statements to look different, or want to bill for special items, or apply late fees, let us know. Or, if there is some other feature you need, let us know.