



## **MEMBER-ZONE – ADMIN GUIDE**

### **MANAGING MEMBERS**

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## MEMBER-ZONE . ADMIN GUIDE



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### 1. Login

Click the **Client Login** button at [www.In-Zone.co.uk](http://www.In-Zone.co.uk)

Enter your Company name, User name and password and click login.

If you have forgotten your login details click the link for forgotten login details and on the next screen enter your account email address. Click the **Email Me** button and, assuming the email address is correct, your login details will be emailed to the address entered.

For support please visit [www.In-Zone.co.uk](http://www.In-Zone.co.uk) or email [support@in-zone.co.uk](mailto:support@in-zone.co.uk)

## 2. Find and Updating Members Details

Click **Members Admin'** and **Find Member'** to display the **Find Member'** screen:

**Find Member**

Enter your search criteria in the one or more of the fields below, then click the "Search" button.

Surname

First Name/Initial

Postcode

Email Address

Telephone

Membership No

Card Swipe

Membership No	First Name	Surname	Renewal Date	Email	Telephone	Details
SQ266	Duncan	Elliott	12/10/2010			

Use the various search criteria to display filtered lists of members.

1. **Surname** . Enter Full or partial Surname e.g. smit will return all the smiths
2. **First Name/Initial** - Enter Full or partial first name e.g. mar will return all the Martins and Margret
3. **Postcode** . Enter full or partial postcode e.g. MK to list all members with an MK postcode
4. **Email Address** . Enter Full or partial Email address
5. **Telephone Number** . Enter full or partial telephone numbers
6. **Membership Number** . Enter full number including any leading zeros
7. **Magnetic Card Swipe** . Position the cursor in this field and swipe the membership card. (A magnetic card reader is required to use this feature). The system will automatically return the membership details from the card swiped.

**(Note** that the cursor must be in the card swipe field **before** swiping the card).



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### Member Details

Membership No	01637	Edit Details 
First Name	Gwyn	
Surname	Smith	Permissions 
Address		
Postcode		
Country		
Telephone Home		
Telephone Work		
Telephone Mobile		
Telephone Fax		
Email Home		
Email Work		
User Name		
Date Of Birth		
Renewal Date	30 Nov 2010	
Membership Card	n/a	
Card Date	n/a	

Enter your search criteria and click Search. To **View** a members details click



next to the member listing.

Click Edit Details to view and edit the members details.

Click the Permissions button to view and change the members system privileges. (See the Permissions section).

If this icon is not present please contact your system administrator or email [support@in-zone.co.uk](mailto:support@in-zone.co.uk)



### 3. Member Permissions

Members are granted privileges via the Member Details Permissions icon.

To grant or remove access to In-Zone privileges click the green arrow or red cross next to the permission to grant or remove.

Permissions Granted	Available Permissions
<b>PermissionName</b>	<b>PermissionName</b>
My Details <span style="color: red;">✘</span>	Member Admin <span style="color: green;">←</span>
Change Password <span style="color: red;">✘</span>	League Admin <span style="color: green;">←</span>
	Find Member <span style="color: green;">←</span>
	Add Member <span style="color: green;">←</span>
	Upload Members <span style="color: green;">←</span>
	Edit Member <span style="color: green;">←</span>
	Permissions <span style="color: green;">←</span>
	Leagues Home <span style="color: green;">←</span>
	Add League <span style="color: green;">←</span>
	Manage Leagues <span style="color: green;">←</span>
	1 2

#### 4. Adding New Members – One at a time

Log into the members only area and click the **Members Admin** button followed by the **Add Member** button in the Membership Management Menu.

### Add New Member

Member's Details		Membership Details	
Membership No	<input type="text" value="p02214"/>	Membership Type	Single Annual Membership ▾
Title	<input type="text"/>	Payment Method	Not Specified ▾
Initials	<input type="text"/>	Date Joined	6 ▾ December ▾ 2009 ▾
First Name	<input type="text"/>	Renewal Date	6 ▾ December ▾ 2010 ▾
Surname	<input type="text"/>	Last Updated	Label
Post Nominals	<input type="text"/>		
Salutation	<input type="text"/>		
Address Details		Other Information	
Address	<input type="text"/>	Date Of Birth	1 ▾ January ▾ 1900 ▾
	<input type="text"/>		Set to 1 Jan 1900 if unknown
	<input type="text"/>	User ID	<input type="text"/>
	<input type="text"/>	Password	<input type="text"/>
Postcode	<input type="text"/>	Do Not Email	<input type="checkbox"/>
Country	United Kingdom ▾		
Contact Information			
Telephone Home	<input type="text"/>		
Telephone Work	<input type="text"/>		
Telephone Mobile	<input type="text"/>		
Telephone Fax	<input type="text"/>		
Email Home	<input type="text"/>		
Email Work	<input type="text"/>		
<a href="#">Return To List</a>		<a href="#">Add Member</a>	

Complete all the necessary fields and click **Add Member**

Make special note of the user ID and password details as your new member will need these to log into the system, book events facilities etc.

## 5. Adding New Members – Batch update

Log into the members only area and click the **Members Admin'** button then the **Upload Members'** button.

Special note: this process uses a CSV file as input to a batch update process. Your membership details must be in the correct format prior to uploading them.

[Click here to download the sample CSV file layout.](#)

### Upload Member Details

This process allows you to upload a CSV file containing a batch of new member details. CSV files may be exported from many software applications or created with tools such as Microsoft Excel.

If the data uploaded contains members with the same membership number the new details will overwrite the existing data. All other member details will create a new member on the database.

The file must contain the following data fields, in the correct order and in the correct format (especially dates). Fields marked \* cannot be left blank. If you would like to download a sample file please [click here](#).

Field	Data Type	Max Size
* Membership ID / Number	text	15
* First Name / Initial	text	30
* Surname	text	30
* Address Line 1	text	50
Address Line 2	text	50
* City / Town	text	50
County / State	text	50
* Postcode / Zip Code	text	10
Country	text	30
E-Mail Address	text	100
Contact Phone	text	20
* Membership Expiry / Renewal Date	date	dd/mm/yyyy

#### Step 1 of 2

To upload the file click on the Browse button to locate the CSV file then click on the Upload button.

This process allows you to upload a CSV file containing your member details. (CSV files may be exported from many software applications or created with tools such as Microsoft Excel).



### 6. **Updating Members – Batch Mode**

If the CSV file to be uploaded contains members with the same membership number(s) as those already in the database the details within the csv file will overwrite the existing membership details.

All other member details will create a new member on the database.

## 7. Batch file Update – File format

The file must contain the following data fields, be in the correct order and in the correct format (especially dates).

Fields marked \* must contain data and cannot be left blank.

[Click here](#) to download the sample CSV file.

### Upload Member Details

This process allows you to upload a CSV file containing a batch of new member details. CSV files may be exported from many software applications or created with tools such as Microsoft Excel.

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* Surname	text	30
* Address Line 1	text	50
Address Line 2	text	50
* City / Town	text	50
County / State	text	50
* Postcode / Zip Code	text	10
Country	text	30
E-Mail Address	text	100
Contact Phone	text	20
* Membership Expiry / Renewal Date	date	dd/mm/yyyy

#### Step 1 of 2

To upload the file click on the Browse button to locate the CSV file then click on the Upload button.

To upload the file, click on the **Browse** button and locate the CSV file and click the **Upload** button. Errors with the file will be displayed in red on the screen. Correct the errors in the file and reload.



### 8. Add / Amend Membership Types

To list the available Membership Types click **Members Admin** followed by **Member Types**.

**List Membership Types**

Description	StartDate	EndDate	Edit
Family Annual Membership	Wed 30 Sep 2009	no end date	
Family Monthly Subscription	Wed 30 Sep 2009	no end date	
Football Member	Sat 01 Apr 2006	Wed 30 Sep 2009	
Party Member	Fri 06 Oct 2006	Wed 30 Sep 2009	
Single Annual Membership	Wed 30 Sep 2009	no end date	
Single Monthly Subscription	Wed 30 Sep 2009	no end date	
Social Member	Sat 01 Apr 2006	Wed 30 Sep 2009	
Squash Member	Sat 01 Apr 2006	Wed 30 Sep 2009	

Add new Membership Type

Click the edit button to view or amend existing membership Types. Click the Add new button to add new membership types then complete the various fields and click Add.

**Add New Membership Type**

Description

Start Date

End Date

Joining Fee

Lapse Fee

Annual Fee  offered?

Monthly Fee  offered?

## 9. Membership Renewals – List Renewals

Click the **Members Admin**' button followed by the **List Renewals**' button.

### List Renewals

Select Start and End Dates from list boxes below and click on Search

**Start Date :**   **End Date :**

Renewal Date	Member Name	Membership Number	Membership Type	Payment Method	View Payments	View	Renew
31/12/2009	brand, jacque	08449	Standard Monthly Subscription	Direct Debit			
26/12/2009	Howseman, Rowan	00121	Annual Membership	Debit Card			
02/12/2009	Taylor, Val	00114	Pay As You Go Member	Not Specified			

Download CSV File  

[Application / Subscription Form](#)

Select the start / end month and year and click the **Search** button.

The system will return a list of members whose memberships expire between the two dates specified.



## 10. Membership Renewals – Renewing Members

From the list renewals list you can perform the following:

1. Click  to View or Amend members details
2. Click  to renew a member
3. Click  to view member payments

When renewing a member you can update the following details:

### Renew Member

<b>Membership No</b>	
<b>First Name</b>	
<b>Surname</b>	
<b>Address</b>	
<b>Postcode</b>	
<b>Country</b>	
<b>Telephone Home</b>	
<b>Telephone Work</b>	
<b>Telephone Mobile</b>	
<b>Telephone Fax</b>	
<b>Email Home</b>	
<b>Email Work</b>	
<b>User Name</b>	
<b>Date Of Birth</b>	Not Supplied
<b>Renewal Date</b>	31 Dec 2009
<b>Card Card Requested</b>	26/11/2008

[Return To List](#)

### Membership Renewal

**Membership Type :** Standard Monthly Subscription

**Renew To :** 31 December 2010

[Renew Member](#)

#### Payment Details

**Payment Service :**

**Payment Method :** Direct Debit

**Amount Paid :**

**Date Paid :** 6 December 2009

**Reference :**

[View Payments](#) [Add New Payment](#)

#### Membership Card

Request Card

[Request Card](#)



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### Membership Renewal section:

- Membership Type . Select the membership type from the dropdown list box
- Renew To . the day month and year upon which the membership expires
- Renew Member . set the renewal date one year on
- Payment Service . PayPal or WorldPay
- Payment Method . selected the payment method from
  - a. Credit Card
  - b. Debit Card
  - c. Cash
  - d. Cheque
  - e. Standing Order
  - f. Online payment
  - g. Online Subscription
  - h. Postal Order
- Amount Paid . Amount of the last payment received
- Date Paid . Date the last payment was received
- Reference . free format text field to record your reference details
- View Payments button . View a list of historical payments

### Customer Payments for

Payment Type	Customer	Service	Status	Date	Amount	Currency	ReceiptID	Refunded	Refund Date	Refunded By
Membership		ePDQ (Barclays)	Completed	26/12/2008	£198.00	GBP		<input type="checkbox"/>	01/01/1900	n/a

[Return To List](#)

Online Payment . payments recorded when a member renewed using one of the online payment methods. The renewal transaction is automatically logged and listed here.

Manual Payments . cash and cheque are recorded manually. See Renew a Member section above.

- Add New Payment button . click to record a new payment record.
  - Membership Card section (*Card-Zone module is required*)
- Request Card . tick the request card tick box and click the Request Card button. The next time a batch of cards is requested a card will be produced for this member.  
Please note: Membership cards are ordered in batches via the Card Zone Module. Cards are produced when a new batch is requested via Card Admin.



### 11. How do members renew their own membership (Requires Payment Zone)

Members can renew their membership on-line at any time:

Login at [www.in-zone.co.uk](http://www.in-zone.co.uk) and click the **My Details'** icon.

To display their renewal form the member simply clicks the **Renew** button and their renewal form will appear in a new window.

They can check and update their details (if any) and click the **Pay Now'** button to complete their purchase.

Upon successful payment a confirmation email will be sent to their email address and their membership record is updated.

**Membership Application & Subscription**  
Secure online subscriptions using  
**PayPal**

Please complete the form, select your membership category and click the Make Payment button.

Membership No:  (Please enter if you are renewing your membership)

First Name:  Surname:

Address 1:

Area:

Town/City:

County:

Postcode:

TeL:

Email:

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Home Phone :  Email (home):

Work Phone :  Email (work):

Mobile Phone :  Renewal Date: 30/11/2009

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Please select Membership required

**Membership Subscription Categories**

All include full membership for BrandNewU	Total Amount	No. Of Payments	Frequency	Payment Amount	Please Tick
Standard Monthly Subscription	£336.00	12	Monthly	£28.00	<input type="radio"/>
Concessionary Monthly Subscription	£216.00	12	Monthly	£18.00	<input type="radio"/>
Annual Membership	£198.00	1	Single	£198.00	<input checked="" type="radio"/>
<b>Amount to Pay</b>				<b>£198.00</b>	