# How to Establish Crush It Holding Accounts

#### **Overview:**

- Crush It Junior Golf requires the ability to maintain a balance associated with the program to be distributed as classes are delivered.
- This balance will be maintained as Credit Book and associated with a specific account in MemberPride.

#### Crush It Holding Accounts: (please set this up through MemberPride or Enroll)

- Junior Camps Holding Account- XG 400
- PGA Junior League Holding Account- XG 401
- Fun Days Holding Account- XG 402
- Crush It Holding Account- XG 403

The funding of these holding accounts will originate from the monthly subscription, specific junior programs, PGA Junior League and junior camps.

- The fees will be allocated as Credit Book resulting in the daily balance of the specific account to be maintained at \$0.
- The Club or applicable department will not fund these accounts or provide additional Credit Book from unapproved funding sources.
- These accounts are **NOT** to be used for association events, events with established member or non-member accounts or for Club sponsored single or multiple day programs. Standard procedures for these types of events should be followed and all credit book/gift cards should be processed the same day as the event or program.

#### Setup:

- Each Club will setup the appropriate account in MemberPride as type XQ (*refer to pages 2-5 for detailed procedures and screenshots for initial setup of holding accounts*).
- Each event or program will have a specific account name. Funds will remain in these accounts until all funds have been distributed or reallocated to revenue accounts.
- Once all Credit Book balances have been removed, the account can be used again under the same name or modified as necessary for future billing and revenue allocation.
- Under no circumstances can one specific account be used for multiple events or programs.(Specific Program -→ Specific Revenue)

#### Naming Convention:

- XG400: Exclusive use for Junior Camps
- XG401: Exclusive use for PGA Junior League
- XG402: Exclusive use for Fun Days
- XG403: Exclusive use the Crush It Monthly Subscription
  - Fixed Billing Charge through you club accounting department.

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Screenshots and instructions below provide guidance on (1) adding type code and (2) adding holding accounts under that type code so they flow to MICROS POS.

First three steps are to establish the "XQ" Client Type. If the club currently hosts other Holding Accounts proceed to Step 4 to begin building the Holding Account within the "XQ" Member Type.

| Utility               | Permissions        | Prospecting                      |  |  |
|-----------------------|--------------------|----------------------------------|--|--|
| Change Password       | Users              | Outside Prospecting Source Types |  |  |
| Reassign Tasks        | Roles              | Default RSVP Time                |  |  |
| Export to 36          |                    |                                  |  |  |
| Auto Task Setup       |                    |                                  |  |  |
| User Sessions         |                    |                                  |  |  |
| Red Star              | Member Types       | Other                            |  |  |
| Preference Categories | Maintenance        | Comment Categories               |  |  |
| Interests Setup       | Categories         | Companies                        |  |  |
| Demographics Setup    | Corporate Programs | Corporate Membership Maintenance |  |  |
|                       | Client Types       | Locker Inventory Maintenance     |  |  |

### 1) In MP, click 'Home' and select Client Types

### 2) Click 'Add'

| Code     | Client Type Name        |        |
|----------|-------------------------|--------|
| 81       | Non-cca Clubs           |        |
| 82       | Cca Club                | ~      |
| 84       | Special Organization    |        |
| 85       | Special Parties         |        |
| 86       | One Time Parties        |        |
| 88<br>90 | Staff<br>Alternate Dues |        |
| 97       | Cash Accounts           |        |
| 98       | Resigned Non-Member     |        |
| DI       | Did Bad Debt            |        |
| 12       |                         |        |
| <u> </u> |                         | -      |
| Add      | View or Change          | Delete |
|          | 4                       |        |
|          |                         |        |
|          |                         | Close  |

| Client Type Name:                                 | Holding Accounts  | Reciprocal Club                 |        |
|---|---|---------------------------------|--------|
| Code:   | XQ  | Local/Associate Club            | Member |
| Holding accounts                                  | Ç   |                                 |        |
| Attributes Magazine                               | Club Newsletter   |                                 |        |
| Manager Message Code:<br>Override Handling Charge | and the second se | Late Charge Code:               | 01     |
| Start Date: 05/24/2018                            | End Date: / /   |                                 |        |
| Billing Setup                                     |   |                                 |        |
| Charge  | Tran Code   | Amount<br>Add<br>Edit<br>Delete |        |
|   |   |                                 |        |

3) Fill out as shown below – enter type code XQ

4) Click the icon to Add a non-member



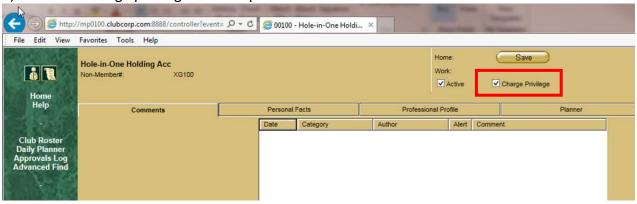
5) Select person

| Select the type of Non-Member |  |
|-------------------------------|--|
| • Person                      |  |
| O Company                     |  |
| CCA Entity                    |  |
| OK Cancel                     |  |

6) Select the XQ – Holding Accounts type and enter the account as needed according to the established naming conventions with your club address and press OK.

| Member Type:       | XQ - Holding Accounts  |
|--------------------|------------------------|
| Member Number:     | XG403                  |
| First Name:        | Crush It               |
| Last Name:         | Holding Account        |
| Gender:            | 🔿 Male 💿 Female        |
| Home Phone:        |                        |
| Work Phone:        |                        |
| Mailing Address    |                        |
| Address: (insert y | our club address here) |
|                    |                        |
|                    |                        |
| City:              |                        |
| Country:           | ~                      |
| State:             | V Zip Code             |
|                    |                        |
| (                  | OK Cancel              |
|                    |                        |

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7) Check the charge privilege box and press the Save button

8) Repeat steps 4-7 for each Crush It Holding Account build.

9)Email <u>pointofsale@clubcorp.com</u> to have the corresponding Holding Account "billing buttons" loaded into the MICROS POS. These will mirror the Holding Accounts built into Member Pride.

| 01119-Golf    | Shop 1                       | Default                 |  | Retall                 |               | Presidents                             |                    | All         | Day           |  |
|---------------|------------------------------|-------------------------|--|------------------------|---------------|--|--------------------|-------------|---------------|--|
|               |                              |                         | Signe  | ed In: 94995 McCo      | ollum         |  |                    |             |               |  |
| Open Check    | Services & Fees              | Merchandise             | Merchandise Packages F & B Vouch                   |                        | Voucher       | oucher Misc                            |                    |             |               |  |
| Member        | Default                      |                         | 1st TRANSACTION -                                  | Billing For Packages   |               | Ben Lav                                | lina Lesson Accour |             | Golf Packages |  |
| Lookup        |                              | Step 1: 1               | Select the Member or pro                           | ceed with Non-Membe    | r charge      |  |                    |             | Childcare     |  |
| Apply         |                              | Step 2: 3               | Select the appropriate par                         | ckage from the selecti |               | Junior Ca                              | mps Holding Accou  | int - XG400 | Packages      |  |
| Lovalty       |                              | Step 3: 1               | fender the check as Memi                           | ber Charge or other te | nder          |  |                    |             |               |  |
| Programs      |                              | ▲ 2nd                   | 2nd TRANSACTION - Move Value To Holding Account    |                        |               | PGA Jr. League Holding Account - XG401 |                    |             |               |  |
| Member        |                              |                         | Select the account where<br>ookup. For Example XG2 |                        | ad from       | Fun Da                                 | ys Holding Account | - XG402     |               |  |
| Charge        |                              | A Step 2: 9<br>Press OK | Select PACKAGE VALUE as                            |                        | billed,       |  |                    |             |               |  |
|               |                              |                         | Package Valu                                       | ie (CREDIT)            |               | Crush                                  | It Holding Account | - XG403     |               |  |
| Credit Card   |                              | Step 3: 5<br>total that | Select MOVE TO HOLDING<br>was placed in Step 2 abo | 5 ACCOUNT and type i   | n the same    |  |                    |             |               |  |
| Credit        |                              | *                       | Move To Holding Accou                              | unt (Load Credit Book) | - 12          |  |                    |             |               |  |
| Book          | Step 4: Verify Your Check To |                         |  | nould Be ZERO          | Page Up       |  |                    |             |               |  |
|               |                              | Step 5: 1               | Select CLOSE CHECK                                 |                        |               |  |                    |             |               |  |
| Cash Subtotal |                              | 0.00                    | Close (  | Theck                  |               |  | Page Down          |             |               |  |
|               | Remove                       |                         | tes Modify   | Split                  | Barcode Entry | Test Print<br>Receipt                  | Send & Stay        | Print       | Send/Done     |  |
| Mo            | Collum, Brad                 |                         | 1/22/2021 11:43:39 AM                              |                        | Online        |  |                    | Online      |               |  |