

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.

How to Establish Crush It Holding Accounts

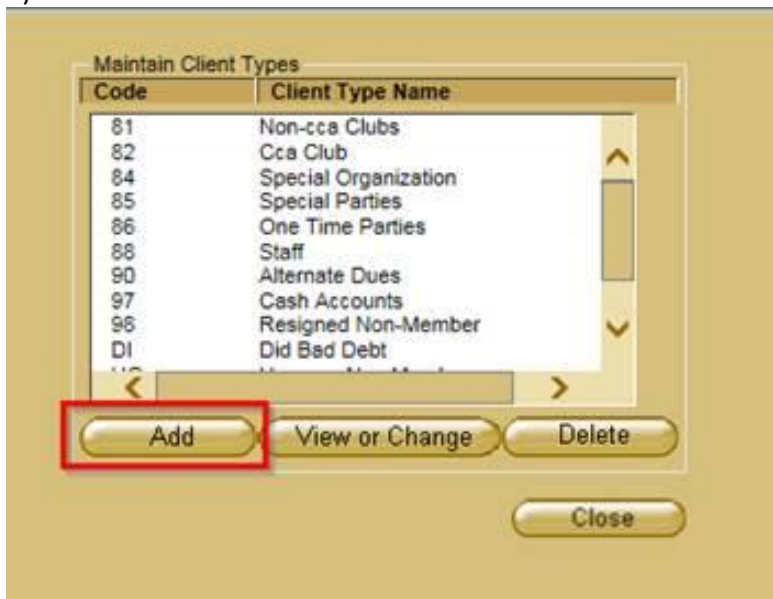
Screenshots and instructions below provide guidance on (1) adding type code and (2) adding holding accounts under that type code so they flow to MICROS POS.

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.

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



2) Click 'Add'



How to Establish Crush It Holding Accounts

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

Add Client Type

Client Type Name: Holding Accounts Reciprocal Club

Code: XQ Local/Associate Club Member

Description: Holding accounts

Attributes

Magazine Club Newsletter

Manager Message Code: 1 Late Charge Code: 01

Override Handling Charge: 0.000 %

Start Date: 05/24/2018 End Date: / /

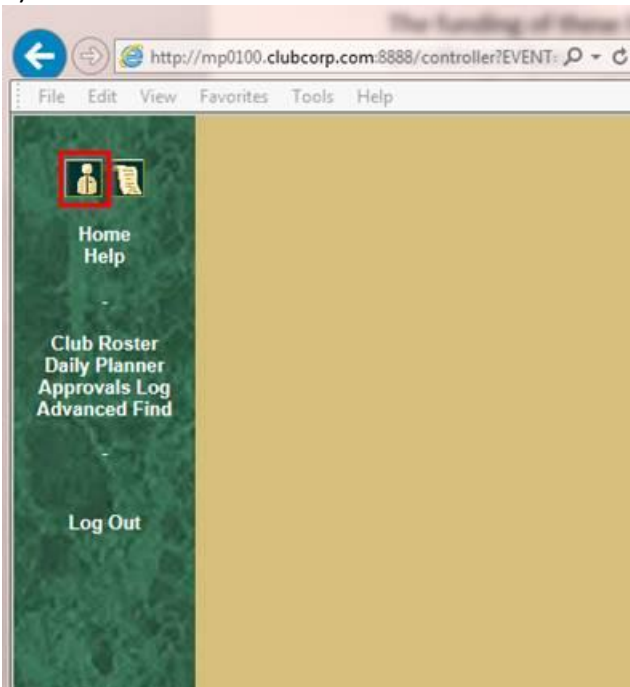
Billing Setup

Charge	Tran Code	Amount
--------	-----------	--------

Add Edit Delete

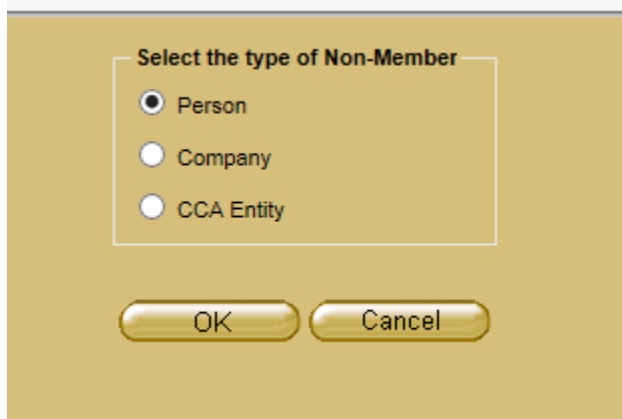
OK Cancel

4) Click the icon to Add a non-member



How to Establish Crush It Holding Accounts

5) Select person



Select the type of Non-Member

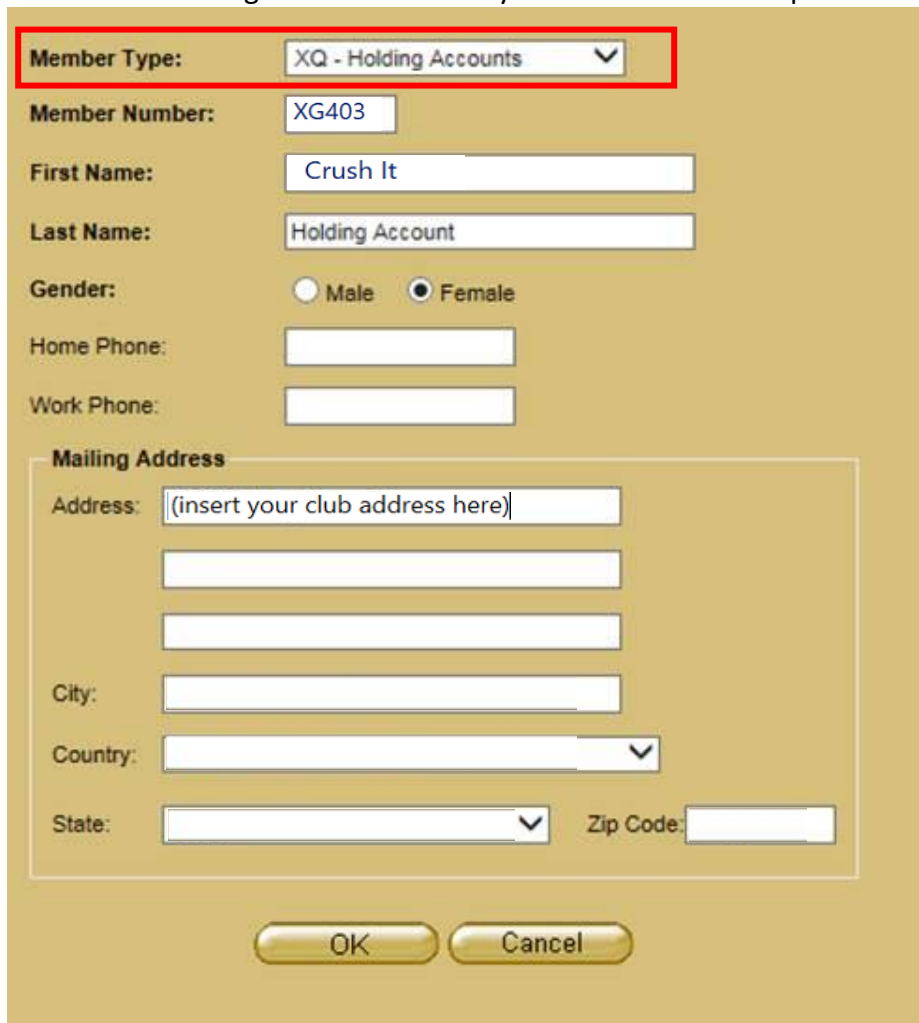
Person

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 your club address here)

City:

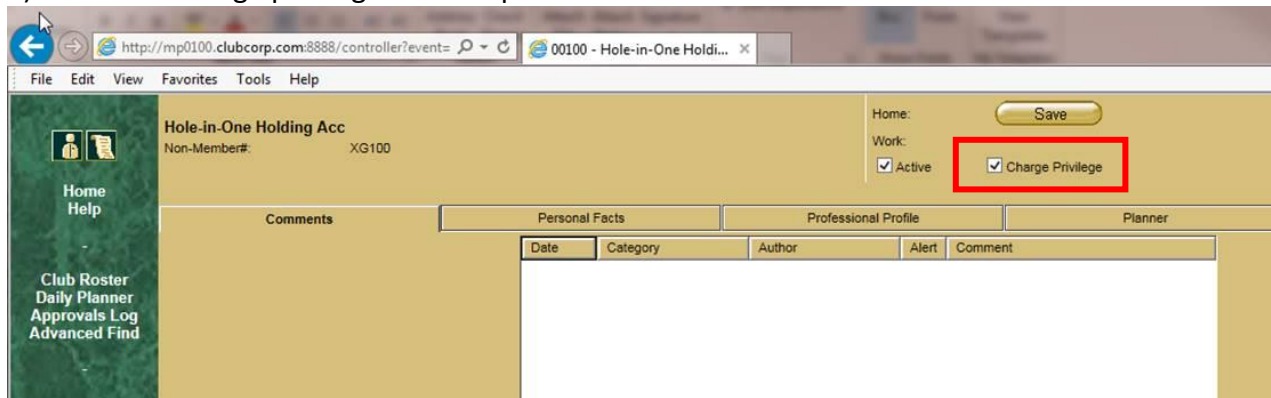
Country:

State: Zip Code:

OK Cancel

How to Establish Crush It Holding Accounts

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 pointofsale@clubcorp.com to have the corresponding Holding Account "billing buttons" loaded into the MICROS POS. These will mirror the Holding Accounts built into Member Pride.

