



QUICK REFERENCE GUIDE 2003




MH Systems Ltd
6 Alexandra Road
Tonbridge
Kent TN9 2AA

Tel: 01732 367227
Fax: 01732 367447

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ADDING NEW MEMBER

- From Membership search page click onto  new member situated under current members name (top left hand corner)
- A blank membership page is opened and your club ID and golf club name appears
- Complete all fields with the members details
- Fields that MUST be completed are:
Know Name / Title / Membership Group
- **Don't start filling the address on the 1st line (reserved for Family) but on the 2^{ed} line**
- If the new member has a handicap, go the Handicap tab along the bottom of the page and click "Assign new handicap" in the bottom right corner
- If a swipe card is required, go to Chips tab and insert swipe card number into the field and fill in all remaining / required fields (see issuing new swipe card)

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THIS IS IMPORTANT**

ADDING NEW MEMBERSHIP GROUP

- Click on *Options > administration > Membership Groups*
- Click onto *Insert record*
- Fill in the Group code and the description
- Select member type (Male/Female/All)
- Select your default discount group (Chips discounts) for all members of the new group. So that the discount is applied to all new members
- If automatically billing a levy enter amount of 1st year levy
- Click *add* on the top right of the Default fees box
- Select one of the prices for ALL of the members in the new group that they will be due to pay. Click *ok* to add the price.
- Repeat the above until all charges have been allocated

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ISSUING NEW SWIPE CARD (NEW MEMBER)

- In Membership of GCGold, add new member in usual way
- In the Chips tab, select your next free swipe card number
- Insert the new card number into the Card number field
- **Check that the Discount Group (default) is correct. If the default (None) is incorrect select the correct group from drop down list**
- Enter a credit limit for the swipe card if required (can be amended later)
- Launch the program Chips designated as the Chips automatic import monitor. The Auto update will update the card numbers.
- As this is for a new member the Card number will not be live until you have restarted the tills to perform the global update of the system. The swipe card will then be activated. If the till is closed down at the end of the day the card will be ready for use the following day.

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ISSUING NEW SWIPE CARD (REPLACEMENT CARD)

- Find member in GCGold and go to Chips tab of their membership
- Delete old number from the Card Number field and enter the new swipe card number

Launch the program Chips designated as the Chips import monitor. The auto update will then occur

- For EXISTING members once the update has occurred in the back office the swipe card will be active on the tills.
- The balance and discounts will automatically be transferred onto the new card number

NB NEVER CHANGE A MEMBERS MEMBERSHIP NUMBER ONCE ISSUED

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DECEASED/RESIGNED MEMBERS

- Does member have a swipe card?
YES – do a balance for card through the till
- Decide what you want to do with the balance i.e. refund to member or forfeit to go into club funds
- Run as a till, then click *add cash to card* on the till and press the **RED** refund button and enter the amount of card balance to remove, the amount will be shown as a negative value. Press 'Ok' this amount is now taken off the card and the new balance should be £0
- Print another balance for the swipe card to check.
- Go into GCGold and select the member and click onto their *Chips tab*
- Delete the swipe card number. Now perform the Chips import update for the card to be removed
- Check if the Accounts page in GCGold is showing a zero balance, if not then please credit/amend as required
- Go to Details tab in GC Gold and select ▼ between your club ID number and your club name
- **Scroll to the top of the list and select the club i.e. 'resigned' to add to your member**
- Add a resigned date into the details page of GCGold

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BILLING

- Add (new) price or make changes to codes by clicking *Options*, then *Administration* then *Prices* tab. Change or modify the new effective date in the *Effective Until* field and assign a new price
- Amend any/all of the price codes. Also check the price codes against membership groups.
- Before billing, make sure all prices overrides the setup during the last subs year are removed, as required by CTRL and DEL any overrides.
- Go to options *Administration/General* tab/select the new *Year Start Date* you are about to invoice for i.e. 01.01.2003
- Click on *Reports* button then *Billing* button, set the tax point date to your year start date e.g.01.01.2003 or after, and create the invoices in the usual way

NB Try to check invoices prior to posting the batch as you can only unpost the last batch posted, although you can credit any invoice individually and re-invoice. It pays to take a little time to check your batch prior to posting – See Separate Billing Guide

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BACKUP

To:

- Set up your system to automatically backup on entry and/or Exit of the GCGold program. Select *Options*
- In the centre of the box there are two tick boxes, select the option for when you wish to do a backup (A) on start or (B) on Exit. Then restart GCGold to make the changes
- Once GCGold has been re-started the option to backup will appear every time you open/close the GCGold software.
- These options are then set as a default for the program and will appear on all copies of GCGold through out the system
- To do a security copy i.e. on floppy
- As above
- In the second field of the GCGold data backup screen type the drive path where you want to backup to i.e. a:\ for a floppy and click 'ok'

NB Making a backup is the only way to restore quickly and safely your data in case of a hardware failure. Technical Support can more effectively help you with data problems if you have made regular/daily backups on a floppy, a CD-ROM or another Hard drive across your network. Avoid backups on the hard drive holding the GC Gold application because if this device crashes so will your backups.

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BACKUP

To do a backup without Exiting the programme

- Select 'F8' on your keyboard the backup window appears
- Enter a reference if required and any security backup drives
- Click 'ok'

NOTE It is strongly recommended that you backup at least once a day and regularly backup a security disk (floppy disk backup). For assistance in upgrading your backup system to tape drive backup or other please contact the Technical Support

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USING FAMILY LABEL FILTER

- This filter enables you to create one label for two or more family members/people you have designated (usually couples or families)
- Search for the husband/father, then click on the *Details* tab and in the 1st address line, in the 'Family' field type how you want the label to be i.e. Mr and Mrs D Hesketh
- Set the *Label Count* box at 1
- Go to Mrs Hesketh details tab. Nothing should be typed into the family field and her label count must be 0
- When creating your report for the labels (see creating labels) under the filter tab make sure the '*family label filter*' is ticked

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CREATING LABELS

- Firstly we need to create a report with all the relevant members in
- *Reports > Report Generator > Columns* tab
- Select one of the name fields with the list below for the label fields
Address1
Address2
County
PCode
- Click '*preview*' tab to view the names and addresses in the report.
- When you have your list of addresses click onto the *label* button (see set up labels) select from which part on the label sheet you wish to start and press '*ok*'

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UPGRADE GCGOLD Software

**Make sure ALL COPIES of GCGold are
CLOSED across the network**

Always BACKUP before doing any updates

On the GCGold server machine

- Double click the *.EXE file (not open) WinZip self-extractor box opens
- Extract to C:\GCGold (where the c:\ is the drive that GCGold is on)
- Click on '*extract*'. A message appears telling you that the files have been extracted successfully. Click '*ok*'
- Then open GCGold normally. It will tell you if you require upgrade to internal version (data). Click '*ok*' and let it go through the update.

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