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HOW TO USE THE NEW MEMBER FORM WITH THE ADDITION OF THE CRM MODULE

This should probably be titled the New Member Form for Proposed and Potential New Members. This form is basically sent to people who have been approved by the club for membership.

First you need to go to the My Club tab and click on the New Member Form on the left column



Next you click on the Email Proposed Member on the top left.



You now need two pieces of information if this is a person who is not in the CRM module. You need their first name and their email address. If they are in the CRM module, then you just need to type at least part of their last name to have the information entered in the body of the Pmail correctly. The major reason for this change is that if the club is using the CRM module, they are already in the system and it was causing an issue with creating two new members.



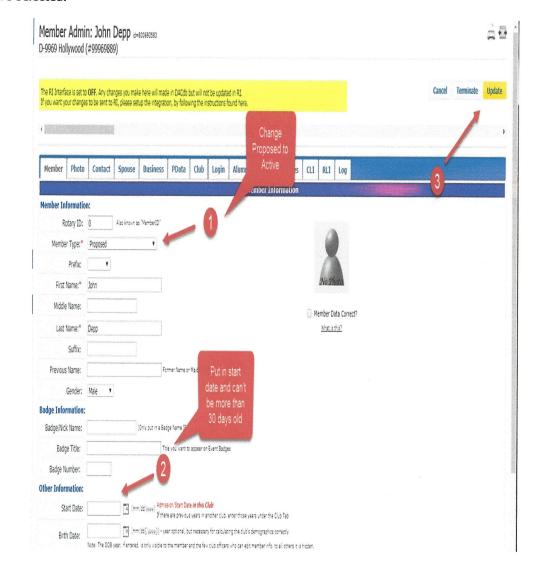
Now when the proposed or potential member receives the email and when the click on here, they will open up the new member from. When they finish filling it out and submit it, the secretary will receive and email that this has been sent and there will be a new Proposed tab on the top of the club member list.



Then you will need to click on the proposed new member's pencil and make some edits



Now when the member is inducted, you just need to click on the Proposed tab and click on the pencil of the proposed member. Then on the information page that comes up, you change the member type from Proposed to Active, put in the start date (which cannot be more then 30 days). It is also a good idea to click on the Contact tab and make sure the email address and address information is correct and that the preferred email and address are selected.



This will now move the member over to the Active/Honorary tab on the club and move them into the Member Compare on the RI Integration page. It is highly recommended that you go in on this page a day or two later and make sure that this person has rolled up to RI and is on the list in alphabetical order.