



Recovery Club Software

MEMBER MANAGEMENT

May 3, 2021

OVERVIEW

This document discusses how to utilize the RCS software to manage your Recovery Club Memberships.


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ACCESSING THE CLUB MANAGEMENT

To access the club management features, login into the RCS website and go to your profile. Your profile is accessed by clicking on the circle in the top right hand corner of the screen. You will be taken to the following “User Profile” screen as shown below.

CONVENTIONSCLUBSABOUT RCS

JD

Orders



Your Profile

Personal Information

First Name: John

Last Name: Doe

Email Address: jdoe@serensystems.com

Telephone: 3101234567

Edit

Affiliation

Affiliation: AA

Recovery Date: 3/1/14

Edit

Address

Address 1: 1234 Main Street

City: Hermosa Beach

State: CA

Zip Code: 90254

Country: United States

Edit

Conventions / Clubs of Interest

You will receive email notifications from the conventions / clubs listed below. Click the Edit button to change your preferences.

Edit

EditChange PasswordLogout

Manage Organization

From the “User Profile” screen you will be able to access the clubs you have access to manage from the button located at the bottom right of the screen, labeled “Manage Organizations”. Press this button and you will be taken to the following screen.

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Organization List

Organization	Type	Security	Last Updated
South Bay Alano Club	CLUB	ADMIN	04-29-2021

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Select the organization you want to manage from the list and the club management page will be displayed.

CLUB MANAGEMENT PAGE

The page displayed below is the main club management page. From this page you will be able to access and manage your club. A partial view of the club management page is displayed below. This document will only discuss user and member management. Additional documentation is available for discussion on how to use the convention and club management features.

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Images

Flyers

Inquiries

Products

Reports

Users

Members

Convention

Convention Summary

Name: South Bay Alano Club

Type: CLUB

Display: true

Logo Code: SBAC

Theme:

Dates: Jan 01 - Jan 01, 2019

Convention Address

Address1: 702 11th Pl.

Address2:

City: Hermosa Beach

State: CA

Country: usa

Postal Code: 90254

MEMBER MANAGEMENT

The member management allows a club to manage its club members.

Member List

To access the member list page press on the “Members” button from the “Club Management” page.

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Member List / Recovery Convention Software

Search

- Member Type -

UsernameFirst NameLast Name

ClearSearch

Results

Id	User	Cup#	BDay	Type	Paid Thru	Primary	Spouse
874	John doe		05-01-2013	Annual Individuall Member	05-03-2022	✓	0

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The member list screen contains three sections:

- Button Bar
- Search Section
- Results Section

The search section allows to you filter on members in the list. Enter the search criteria in the search area, then press the search button to filter the users. If you want to clear the filter, press on the “Clear” button in the search area.

Add Member

From the member list press the “Add Member” button from the top right corner to display the add member screen. The following screen will be displayed.

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Create Member

Member Data

Type: - Member Type -

User: User's email address

User's first name

User's last name

Date Paid: 5 May 2021

The Paid Thru date will be set automatically when creating a new member, based on the membership type and date paid.

Paid Thru: -Select- -Select- -Select-

Primary User: ☒ Yes ☐ No

Cup #:

Spouse Id: 0

Notes:

← Cancel Save

The fields comprising the create member will be discussed as follows.

- **Type:** This required field identifies the member type.
 - **User:** This identifies the username of the user associated with this member. A user can be associated more than one club. If the user name is found in the RCS system it is associated. If the
-

username is not found then the user's first name and last name must be entered so that the user can be created and associated with the member.

- **Paid Date:** The paid date represents the date the member paid. This will default to today's date. You can change this date to reflect the actual paid date.
 - **Paid Thru:** If you leave this field blank it will be calculated based on the member type. For instance if the membership is a monthly membership. One month will be added to the paid date to determine the paid thru date. You can override this date and in this case the system will not calculate the date and use the date you entered.
 - **Primary User:** This field represents if the user is primary or secondary. Used for memberships that are a couple. The primary member of the couple is the paying member. When adding a two members of a couple membership. First enter the primary member. From the primary member a button will be displayed to add the spouse. This will automatically create the relationship between the primary and secondary member.
 - **Cup #:** Optional field that can be used to maintain the cup number of the member in clubs that utilize cups.
 - **Spouse Id:** This represents the spouse Id in a membership that reflects a couple. This will be set automatically when adding a spouse to a primary member. This can also be set manually when required to do so to clean up data.
 - **Notes:** This field allows you to enter notes pertaining to the member.
-

Add Spouse

After creating a member with a member type associated with a couple, a button will be displayed on the top right of the member to add the spouse. This “Add Spouse” button is displayed on the member shown in the screen below.

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+ Add Spouse

Member

Member Information

Id: 876

User: John doe

Club: Recovery Convention Software

Membership Type: Annual Couple Member

Paid Thru: 05-05-2022

Paid Date: 05-05-2021

Cup #:

Notes:

Couple Information

This section is valid for memberships that include a spouse.

Primary field indicates the primary payee.

Primary: ✓

Spouse Id: 0

User Information

Username: jdoe@serensystems.com

Phone:

Affiliation: AA

Recovery Date: 4/1/14

View User

As you can see the “Add Spouse” button is displayed in the top right corner. Also note the member is primary and the Spouse Id is currently set to zero. After adding a spouse, this Spouse Id field will be set to the associated Spouse Id, corresponding to the member Id of the spouse. After pressing the “Add Spouse” button the following screen will be displayed.

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Create Member (Secondary)

Member Data

Creating a secondary member only requires a valid email address for the secondary user. Optionally, you may enter any relevant notes. Other member fields are disabled. You can go back and modify the member after it is created.

Type:	Annual Couple Member ▼		
User:	<input type="text" value="User's email address"/>		
	<input type="text" value="User's first name"/>		
	<input type="text" value="User's last name"/>		
Date Paid:	<input type="text" value="5"/> ▼	<input type="text" value="May"/> ▼	<input type="text" value="2021"/> ▼
Paid Thru:	<input type="text" value="5"/> ▼	<input type="text" value="May"/> ▼	<input type="text" value="2022"/> ▼
Primary User:	<input type="radio"/> Yes <input checked="" type="radio"/> No		
Notes:	<div><div></div></div>		

[← Cancel](#)[Save](#)

The fields comprising the create member (Secondary) will be discussed as follows.

- **User:** This identifies the username of the user associated with this member. A user can be associated more than one club. If the user name is found in the RCS system it is associated. If the username is not found then the user's first name and last name must be entered so that the user can be created and associated with the member.
- **Date Paid:** This field is read only and reflects the date paid of the primary member.
- **Paid Thru:** This field is read only and reflects the paid thru of the primary member.

-
- **Primary User:** This field is read only and will be set to No, since this is the spouse of the primary member.
 - **Notes:** This field allows you to enter notes pertaining to the member.

The picture below shows both members after adding the spouse member.

Results

Id ⇅	User	Cup# ⇅	BDay	Type ⇅	Paid Thru ⇅	Primary	Spouse
876	John doe		04-01-2014	Annual Couple Member	05-05-2022	✓	877
877	Mary Doe			Annual Couple Member	05-05-2022	✗	876

Updating Members User Data

As mentioned before the user record is linked to the member record. To update the users data follow the following steps:

- Find the member you want to update in the member list
 - Select on the member to display the member information
 - Select the “View User” button in the User Information section.
 - Select the “Edit” button on the bottom of the page.
 - Make the required changes to the user’s data
 - Select the “Update” button to save the changes you made
 - Select the associated member record in the Club Memberships section to return back to the members record.
-

Change User Associated with Member Record

There may be several reasons an incorrect user is associated with a member record.

- You created the member and entered the incorrect user's email address. This resulted in created a new user.
- Some users have multiple accounts using different email addresses and you associated the member with the incorrect user account.

For whatever reason you need to change the user associated with the member the following steps will show you how to make the change:

- Find the member in the member list
- Select the member you want to change
- Select the "Change User" button at the bottom of the screen. The following screen will be displayed:

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Edit Member - Change User

Member Data

Changing a user associated with a member only requires a valid email address. Optionally, you may enter the first and last name. If the username is not found a new user will be created.

User: User's email address

User's first name

User's last name

← Cancel

Update

Enter the new User's email address and optionally the first and last name if this is a new user. Press the "Update" button after entering the data. The new association between the member and the user will be created.

Apply Membership Dues

To apply the membership dues to a member, find the member in the member list. Once the member is found click on the member to display the member information. Press the button “Pay Membership Dues” to apply dues to a membership. The following screen will be displayed.

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Pay Member Dues / John doe

This page allows you to apply dues to a member and spouse.

Member Data

Type:Annual Couple Member▼

Date Paid:23▼May▼2021▼

Setting this flag will allow you to start a membership from today instead of the paidThru date

Paid From Today:YesNo

The Paid Thru date will be set automatically when applying the dues to the membership.

Paid Thru:5▼May▼2021▼

Primary User:✓

Cup #:

Spouse Id: 877

Notes:

← Cancel

Update

The following is a description of the fields that can be updated.:

- **Type:** Corresponds to the member type
- **Date Paid:** The date paid will default to the current day. Change this date as required.
- **Paid From Today:** If set to no. The paid thru date will be calculated from the previous paid thru date. If the set too true, the paid thru date is calculated from the date paid.
- **Notes:** Update the notes as required.

When you are finished updating the data, press the “Update” button to apply the dues to the member.
