



**NAQ***Technology*



## ***Release Notes***

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***MEMNET v2.6 Upgrade***

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***Wednesday 10<sup>th</sup> August 2011***

## **Member Status of Pending**

MEMNET now have a Member Status of 'Pending' (in addition to the existing status values of 'Active' and 'Inactive'). The 'Pending' status is designed to be used for new member applications where you need to go through a process to assess the application before confirming their acceptance as a member. A Pending member can be:

- Searched for using the Advanced Member Search feature
- Excluded from Mail Generation and Renewals Invoicing processing
- Filtered for but by default excluded from Mail Generation

It is worthy of mention that the Pending status is fully integrated with the New Member Application process that we have recently completed for one of our clients. The New Application process is 'bespoke' for every user of our systems. The setting up of this facility for you would incur development costs but it is an option available for you if you wished to implement such a feature.

## **Member Search Icons**

To be able to quickly see the status of a Member, different icons are displayed depending on the Status of the Member and whether they are 'Financial' or 'Unfinancial'. The icons are:

Also note that the 'Financial', 'Unfinancial' status is currently maintained manually against the Member. If you have business rules relating to this that you wish to have implemented to update the status automatically please contact us.

1. Active Member (green user)
2. Inactive Member (red user)
3. Pending Member (orange user with question mark)
4. Archived Member (grey user)
5. Active Contact (green envelope)
6. Inactive Contact (red envelope)
7. Pending Contact (orange envelope with question mark)
8. Archived Contact (grey envelope)
9. Unfinancial Member (red dollar symbol)

Member List							New Member
Search							
Wildcard character % can be used.							
Membership Name/Code:						Search	Clear Search Criteria
Advanced Search (Show Details...)							
	A00099	Abbey Cornwell	HDOFF	Non Member	WENTWORTH	2011	
	M0000055	Albert Fritz	NEW001	Member	MEREWEATHE...	2045	
	A0000053	Allan Crenshaw	SYD004	Associate	GLEBE	2015	
	M00070	Andrea Simpson	ADLOFF	Member	WASHINGTON	2155	
	M00100	Angus Young	PER001	Member	PERTH	8042	
	M00077	ANZ Bank	ADLOFF	Web Access Only	SYDNEY	2000	
	M0000049	Arnold Jefferson	NEW001	Member	SYDNEY	2012	
	M0000014	Arthur Smith	SYD002	Member	PENSHURST	1564	
	EA00101	Aubrey Newman	HDOFF	Event Attendee	BATTEAU	2044	
	M0000068	Augustine Wentworth	SYD003	Web Access Only	DUBBO	2015	

## SecurePay Payment Gateway

The SecurePay payment gateway is now integrated as an option into the Member Self Service functions of MEMNET. Your Members can now log in and pay invoices online. Previously, we only supplied a PayPal service for this. With the SecurePay service:

- We offer a secure (https encrypted) facility to make payments through all major credit and aligned debt cards
- Provide you the option to have the Member database updated immediately on confirmation of the payment being accepted (this is not available through PayPal) saving you the need to allocate the payment manually
- Funds are deposited into your Bank Account with the Member/Transaction reference for easier Bank statement reconciliation.

Please let us now if you are interested in utilising the SecurePay service (SecurePay is a trademark and is owned by Australia Post). More information can be found at [www.securepay.com.au](http://www.securepay.com.au). If it is of interest we can arrange to get a representative of SecurePay to talk to you about the overall service that is offered

## Payment Screen – Service Fee

The Payment screen has been amended to include a Service Fee. This provides you with the option of charging a Service Fee and accounting for it when posting payments in the Accounts Receivable module.

An example of how it works is; if you receive a payment for an invoice of \$100 and due to it being paid by credit card you had charged \$102 (including a service fee of 2%) you would do the following. On the Payment screen you would receipt \$102 and put in the 'including a Service Fee' field the Service Fee of \$2. The remainder of the payment allocation process (for the \$100) would remain unchanged.

When the posting is updated we will record the \$100 against the invoice selected and we will automatically generate a \$2 Service Fee invoice as fully paid. We have introduced another transaction type of 'Service Fee'. The receipt will be recorded as \$102 paying both the original invoice and the Service Fee invoice.

The new invoice will allow you to report on the amount of income collected as Service Fees.

The Member Self Service payment screen can also be configured to automatically calculate and charge the Service Fee.

**Transactions For Member: X00000030 - Jason Dellavedova** Return to Member

Taxable Status : Standard

Payments Manual Invoice Payment Enquiry

Incomplete Transactions ▾

Make Payment

Payment Description: <input type="text"/>	Payment Reason Type: <input type="text" value="Payment"/>
Payment By: <input type="text" value="Self Service Credit/Debit Card"/>	Receipt Number: <input type="text" value="Auto-generated"/>
Total Amount: <input type="text"/>	Inc. a Service Fee of: <input type="text" value="0.00"/>
Card Type: <input type="text" value="MasterCard"/>	Card Number: <input type="text"/>

Pay

## Payment Screens – Credit Card Details

The Payment screen has been amended to reduce the amount of information you have to record when indicating that the payment is by credit card. We now only ask for the Credit Card number which we mask with \*\*\*\* when storing. You do not have to record the expiry date/name/security code.

**Transactions For Member: X00000030 - Jason Dellavedova** Return to Member

Taxable Status : Standard

Payments Manual Invoice Payment Enquiry

Incomplete Transactions ▾

Make Payment

<b>Payment Description:</b> <input type="text"/>	<b>Payment Reason Type:</b> <input type="text" value="Payment"/>
<b>Payment By:</b> <input type="text" value="Credit Card"/>	<b>Receipt Number:</b> Auto-generated
<b>Total Amount:</b> <input type="text"/>	<b>Inc. a Service Fee of:</b> <input type="text" value="0.00"/>
<b>Card Type:</b> <input type="text" value="MasterCard"/>	<b>Card Number:</b> <input type="text"/>

Pay

## Payment Enquiry

A new Payment Enquiry screen is available within the Accounts Receivable module. Previously called 'Dishonours' this screen allows you to enquire on payments (and perform dishonours/refunds as before). You are able to search on Receipt number. In the next version it is our plan to provide you with the ability to 'reprint' a receipt directly from this screen.

In addition, within the enquiry of a particular receipt you have the ability to amend the description of the receipt (Payment Description field). This allows you to correct any mistyped descriptions.

**Transactions For Member: X00000030 - Jason Dellavedova** Return to Member

Taxable Status : Standard

Payments Manual Invoice **Payment Enquiry**

Payment Filter

Receipt Number:  Filter Clear

Dishonour Payment

Reason:  Account Code:  Dishonour

Description	Created Date	Amount	Receipt Number	Document List	
Direct Debit	27/04/2011	\$398.25	R00000236	SUBI00000330	▢
Direct Debit	27/04/2011	\$261.75	R00000235	SUBI00000330	▢
Direct Debit	27/04/2011	\$146.75	R00000238	SUBI00000152	▢
Direct Debit	27/04/2011	\$55.00	R00000237	SUBI00000326	▢
Direct Debit	27/04/2011	\$2.75	R00000231	SUBI00000409	▢
Direct Debit	27/04/2011	\$115.50	R00000230	SUBI00000433	▢
Direct Debit	27/04/2011	\$110.00	R00000232	SUBI00000407	▢
Direct Debit	27/04/2011	\$55.00	R00000234	SUBI00000354	▢
Direct Debit	27/04/2011	\$55.00	R00000233	SUBI00000376	▢
other	1/12/2010	\$165.00	R00000147	DN00000015,CN00000065	▢

1 2 3

## **Distance Finder**

A new optional feature is available within Mail Generation and the Member CSV extract. You can now select a list of Members based on their geographical distance from a central post code. This allows you to select and target members who reside within a geographical km distance of a post code. To utilise this feature you enter the Post Code and the KM distance you are interested in.

Please contact us if you are interested in activating this feature.

## **Minor Enhancements/Bug Fixes of Note:**

### **State and Post Code spaces, letters and numbers**

You can now add spaces and numbers in State and Post code fields for International addresses

### **Job Title and Role available in Mail Generation**

These 2 fields were not available in Mail Generation and Account Doc Generator. They have been added and their field names are:

- JobTitle
- Role

### **BPAY reference in Member CSV**

The BPAY reference field is now included in the Member CSV extract.

### **Organisations (Address and Phone Numbers optional)**

Within the Organisation record the address and phone numbers fields are now optional which will speed up maintenance for those who do not wish to collect that level of data.

### **Performance improvements in Events (switching an attendee between being a person on a Membership to being a Guest and vice versa)**

Switching the maintenance of attendees as part of a booking has been improved. The process of switching an attendee from being a person recorded on the Membership to being a Guest was slow and this has now been resolved.

### **Reconfirmation on the use of the Subscribed Until Date**

There has been some confusion regarding the use of the Subscribed Until Date – some of it caused by us. Brad will go through this during his presentation of the latest version but in summary:

- Subscribed Until Date is the date from which the next invoice will be due
- If you have a Membership that runs from 1 July 2011 until 30 June 2012 the Subscribed Until date will be 1 July 2012.

Once established this field is automatically maintained. We will be reviewing each of your databases just to ensure all records are correct. If we find any discrepancies we will resolve them and let you know.

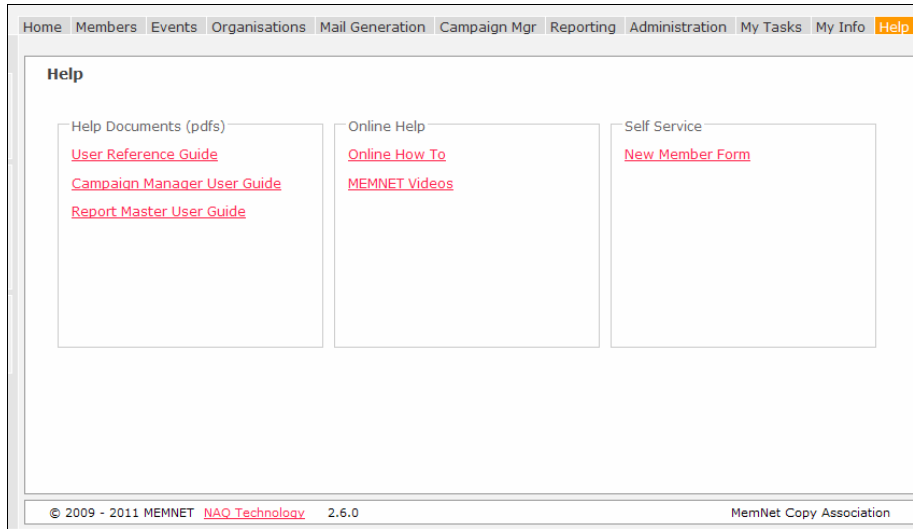
## **New Help Page**

We continue to try and improve the self help facilities provided as part of MEMNET. The Help page has now been extended to incorporate

- More User manuals/guides

- Access to an FAQs/How To MEMNET website page
- Videos for releases of the software and special subjects
- Direct links to Public (non Member) Self Service pages as they are implemented for fast access. Examples will include New Member Registration/Event Bookings etc as they are implemented by your organisation

We welcome feedback on how we can continue to improve this section of the system.



## **Next Version**

We continue to encourage you to provide us with feedback with what you would like to see in the system that would make the system of more value and easier to use. Please do not assume we know – we do not use it as much as you do!

We have taken on board the feedback provided to Donna in her recent ring around and some of those we have managed to squeeze into this release. If not they have gone into our development schedule.

Influences on what we do next come from you our existing users, prospects (as we gain feedback during presentations) and the needs of new clients. We try and ensure a balance of priorities to satisfy everyone but apologies if we take a little longer to get around to an item close to your heart – but rest assured we will not forget it.

Our current focus is on Member Self Service to provide more screens to allow Members to maintain more information in a controlled environment to help reduce the administration overheads within your office. Other smaller projects and fixes will also be incorporated into the next release which we expect to be in a couple of months time.