

This document should be used in conjunction with the U3A Beacon Management System User Guide which will provide additional detail on using the functionality described in this document.

Purpose:

The purpose of this process is to register a renewal for an existing member.

Pre-requisites.

Before starting this process ensure that the following are available. It is not recommended to start this process if any of the following are not available.

- A completed paper U3A Renewal Form.
 - A supply of blank U3A membership cards
 - A computer connected to the Beacon system
 - The member who is renewing is available to you.
1. Log on to the Beacon System and select 'Membership Renewals' from the Administration home page. The Membership Renewals screen will show a list of members who have not renewed this year.

Lapsed Members

By selecting **the 'Previous years, before 1 Jan 2017'** radio button near the top of the page, members who have not renewed for one or more years are displayed, so that they can be renewed, retaining their original Member record.

2. Locate the member in the list. This can be done by selecting the first letter of the surname in the list of letters from A –Z in blue. This will position the list in the appropriate place to find members with their surname starting with the letter selected.
3. Using the information Membership No., Names, Phone Number and Email in the top left hand corner of the form, check that the correct Member has been located and check that all the information is correct, including the email address. If there are any changes to be made, then hold down the CTRL key and click on the member's name. This will open the Member's details record in a separate tab.
4. Click on the 'Member Record' tab which will now show the member's record. Make any changes necessary and click on 'Save' which will update the member's details. The Member Record tab can now be closed.
5. Click on the 'Renewals' tab. This will now show the renewals list and any changes that have been made will be shown.

6. Receive the amount due from the Member and record in the left hand corner of the Renewal Form the amount received in the 'Fee Paid' space, the Payment Type, initial the Renewal Form and enter the Date Paid.
7. Enter the amount received in the **Received** column (3rd from the left), which may have a preset amount.
8. Tick the checkbox in the **Select** column (1st from the left). This will show a message '*Tick to indicate that this member should be renewed.*'
9. Navigate to the bottom of the list. The round icon with an inset down pointing arrow in the top right of the screen will take you to the bottom of the list. Select **Renew Selected Members** from the proposed action drop down list. Click on '**Do with selected**'. This will then process the Member that has been selected for renewal.
10. There will now be a confirmation screen '**There are 'n' renewals selected for processing**' ('n' will be the number of members to be renewed). Selecting '**Continue**' will action the renewals selected. '**Cancel**' will return to the renewals list.
11. If '**Continue**' has been selected a screen will appear that will provide the option to enter a cheque number, which is not required. Click '**Update**' which will then return to the Membership Renewals list.
12. At the bottom left corner of the Renewal Form indicate that the transaction has been recorded by circling the '**Yes**' after the word '**Recorded?**'
13. Complete a new card with the member's name and membership number and issue to the Member.
14. The Member should now not be shown on the Renewals list.

End