

### I. Dues Payment by Check

About a third of the membership pays their dues by check, mailed to the membership chairman. When a check is received the membership database is opened from the admin menu on the website. In the top menu or sidebar menus select Membership, then Members. This brings up the members list. The member's name is put in the search box which reduces the members list to that last name. Take care because there are some members with the same last name.

Under the username click on **+order**. This brings up a blank order form for the member. First verify that the members level is correct (printed vs. electronic newsletter, etc.). Then update the member's expiration date. This should be set to the end of the month. Use the dropdown list to select the payment type and select Check/Cash. Enter the amount of the check. Under Order Notes enter: "Check XXXX recd DDMMYY", then click add order.

Send the member an email (if they have an email address) advising them that their check has been received and their new dues expiration date.

If a member has filled out his renewal online and selected payment by check you will have to edit his order when the check comes in and change the status from "pending" to "success". Be careful as the system renews the membership automatically.

### II. Renewal by Credit Card

The renewal process has now been limited to Stripe. This system has a better fee structure than PayPal. PayPal is still used by some members who opted for auto-renewal before the change was made.

There is usually no action to take on renewals by credit card. The exception is when someone's card expires, or they get a new card. This can be updated directly on the website if payment is through Stripe. If this issue comes up with a member still paying by PayPal, they will have to make the change with PayPal.

### III. Club Emails

Occasionally a regional rep will request an email list for his region, or that a notice be sent out advising of an upcoming event. These lists are easiest to obtain from an excel export from the database.

Similarly reminder emails are sent for the United, elections, and other club business.

### Reminders

Reminders are sent by the software automatically one month and 10 days before a member's expiration date. Members without an email address have been assigned an email address of [username@teae.org](mailto:username@teae.org). These come to the club email address. When you get one of these send a postcard noting the member's expiration date after their name in the address field. A similar note is sent on expiration. There are pre-written postcards for this purpose.

4 months after a member expires, he should get a note asking why he left, if he sold his car ask to let us know and encourage the new owner to join, etc.

### IV. New Members

#### a. Payment by Stripe

If a member joins using Stripe, you'll get a notice that looks the same as a renewing member. If you don't recognize the name go to the members list as an admin, and the newest member will be listed first. This is how you can spot a new member. (You should make sure the list is sorted by Start Date or Registered Date, since it can be sorted various ways. The default is newest first. I suggest leaving that way.)

#### b. Payment by check

This is handled the same as above for renewals.

#### c. Member numbers

In both cases a new member needs to get a member number. The surest way to avoid duplication is to export the members list and sort by member number, then simply assign the next number in the members extended profile. (I screwed up and gave out numbers 3999 and 4000 a while ago. Fill in the numbers below that, we're someplace in the 3500's now.)

#### d. Welcome Package

First send an email to the appropriate regional rep that a new member has joined in his region for him to welcome into the club. Provide all the contact info you have as well as any info about his car if he provides it.

Next send an email to the new member welcoming him to the club, giving him his member number along with advising him of his username and regional rep's name. There are forms in the files.

Finally, prepare a welcome package including a letter, membership card, and TEAE magnet, and if a printed newsletter was selected a recent newsletter and mail it to the member. there are form letters formatted for club letterhead in the files. Make sure the right region and regional rep is shown. They should be updated periodically for any information about upcoming events.

### V. Quits

On occasion a member sells their car or quits for another reason. In these cases, the members “level” is changed to 11, No Reminders, so that he isn’t sent any more reminders when his dues expire.