

1. Introduction

This guide provides a step-by-step instructions of

2. Getting Started

Read this chapter, in order to learn how to set up initial software settings before operate the membership management software.

2.1 Login

1. Double click on the "Membership Software" icon at desktop.
2. Then, you can see the following Login page:
3. There are two options of user accounts: "I'm staff" (Personnel account) and "I'm member" (Member account).

If you are personnel, tick "**I'm staff**" to log in to personnel account.

If you are valid member of club house, tick "**I'm member**" to log in to member account.

4. Then, enter your ID and password.

By default, "Your ID" is admin and "Password" is aaaaaa.

Please make sure the tick is on the "I'm staff" option.

5. Click "**Login**".

Warning: Please don't forget your admin account password; only authorized programmers can regenerate a new password.

6. The following Main Interface will popup.

2.2 Basic Settings

1. Go to General Settings > Settings.
2. Company logo: Click "**Browse...**" > Select company logo file with format jpg and png only > Click "**Submit**" to upload the picture file into the software.
3. Company name: Enter company name > Click "**Update**" to save. Company name will show in invoice and receipt.

4. Required customer name: Tick to show customer name in booking process.
5. Receipt auto popup print: Tick to confirm an automatic popup a receipt on every checkout.
6. Start business hour: Select business start time> Click **“Update”** to save. For example: If your business hours are from 8 am to 11 pm, then you should select business start time at 8 am; the software will then set 8 am as the opening time, from the next day.
7. Auto logout in: You can define a time for software to automatically logout.
8. Alert before: You can define an alert time for software, to remind cashier, that particular courts will be finished soon.
9. Default duration: Fixed at 1 hour, you can neglect it.
10. Disable change time: Define the minimum time to forbid operator or user to change booked time. Range is 15 minutes to 99999 minutes
11. Item Tax: Set the tax rate on purchase item price. Range is 0-100 %.
12. Membership Tax: Set the tax rate on membership fee. Range is 0-100 %.
13. Member expiration reminder: You can define a reminder time to notify admin which membership is going to expire. Range is 1 to 9999 days.
14. Member Renewal invoice reminder: You can define a reminder time to notify the admin, to print out an invoice to collect membership renewal fee from expiring members.
15. Member Expired Reminder: You can define a reminder time to continuously notify admin which membership is already expired. You can freeze their account or continue waiting for their response.
16. Countdown Timer: Always On, you can neglect it.
Sample: Countdown Timer is on.
17. Smart Backup: Always On, you can neglect it.
18. Remember to click **“Update”** to save your changes.

3. Staff Management

Read this chapter to learn how to set up staff accounts before register membership accounts.

3.1 Create staff account

1. Go to “Add New Staff” at the main interface.
2. Select Account type “Cashier”, “General Manager”, “Administration”, “Finance Officer” or “Customer Relationship Officer (CR Officer)”.

3. Fill up staff information: full name, gender, religion, date of birth D.O.B, NRIC, Contact No., email address and mailing address.
4. Remember to click **“Create”** to complete the staff registration process.

3.2 Staff Account Privilege

1. Double click “Membership software” to login personnel account.
2. Each personnel will have their own staff ID. You can request staff ID from Admin account.
3. Enter personnel ID and password. Default password is 123456.
4. After login staff account, click **“write”** > enter new password > click **“Update”** to save changes.
5. Types of staff account and their privileges are as follows:

4. Membership Management

Read this chapter to learn how to set up membership profile and create membership card, to principal account and sub account.

4.1 Create Membership Package

1. Click “Membership” at the main interface.
2. Fill in “Membership Label”, “Fee”, “Membership period –days”, “Booking Discount Rate (%)” and “Item Discount Rate (%)”. For example: If your membership fee is RM 1200/year, then, you can enter membership name and fee as the membership label, membership period is 365 days and Fee is RM 1200.
3. Click to complete creating membership package.

4.2 Create Principal Member Account

- 3.2 Create Principal Member Account 1. Click “Add New Member” at the main interface.
2. Fill in “Prefix”, Full Name, Gender, Religion, D.O.B, NRIC, Contact No., Email Address and Mailing Address.
3. Click to complete creating principal account.
4. Member ID will be assigned automatically in sequence U0001, U0002, U0003, U0004, U0005
5. Upload member’s photo.

6. Click to upload photo file like jpeg or jpg.
7. Click icon to make this photo become profile picture.
8. Principal member account is created successfully.

4.3 Assign Membership Package

- 3.3 Assign Membership Package 1. Click on one principal member in the "Members List" page.
2. Then, "Assign Membership" page will pop up as follows.
3. Member ID will be created automatically.
4. Select membership package options which is created in chapter 3.1.
5. Click blank column in "Assign member card "and touch the membership card on the card reader.
6. Click to complete creating card to principal member.

4.4 Invoicing Members

1. Click in "Member List" page.
2. "Member Fee Transactions" page will popup.
3. Click to print an invoice to members.

4.5 Payment Options

1. Click to process member payment in "Member Fee Transaction" page.
2. A payment option dialog box will pop up and select "Cash", "Credit Card" or "Cheque" option.
3. Then, click in dialog box.
4. If "Credit Card "option is selected, enter credit card number and credit card bank name and click to complete the payment process.
5. If "Cheque" option is selected, enter cheque number and bank name and click to complete the payment process.

4.6 Receipt

1. Click to print receipt in "Member Fee Transactions" page.

4.7 Create Sub Account

1. Click to create Sub Account for Principal Member.
2. Principal account will be automatically filled up.
3. Select "Relationship between principal" option.
4. Fill in "Prefix", Full Name, Gender, Religion, D.O.B, NRIC, Contact No., Email Address and Mailing Address.
5. Click to complete creating Sub Account.

4.8 Assign Membership Card

1. Click the tab of "Assign Member card", then swipe card on card reader and click to save membership card data; complete creating membership card process.
2. After membership card is completed, a card icon will change from to .
3. Repeat the step on Sub Account.

5. Membership Renewal Reminder

6. Offline Reservation and Booking System

7. Member Discount

8. Membership Sales Reporting

9. Marketing Analysis Report

10. Marketing Tool

11. Database Backup System

12. Quick Links

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