



QuiSuite Membership

Members, subscriptions, Direct Debits, takings and the AGM: a step-by-step guide for club secretaries and treasurers

Example_QSMembership

Everything in this guide is done in the Demo Membership company on the QuiSuite USB test drive, so you can follow every step yourself.

How to use this guide

Plug in the QuiSuite USB drive, open **TestDrive.bat**, press **3** for QuiSuite Membership, and log in as **Admin** with the password **Admin**.

Read a page, then do the same thing on the screen. Nothing you do can harm anything: the test drive starts afresh every time.

QuiSuite Platform version 1.33

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Contents

Welcome to QuiSuite Membership.....	3
Starting QuiSuite Membership.....	3
The main window.....	4
How a club's money works.....	6
1. Every member has an account.....	6
2. A subscription is a contract that renews.....	6
3. Direct Debit: the club collects, the member does nothing.....	6
Setting up the club.....	7
Club Settings.....	7
Member types.....	8
Members.....	9
A member's record.....	10
Adding a member.....	11
Subscriptions.....	13
Setting up the dues.....	13
Invoicing the dues: Contract Billing.....	14
Direct Debits.....	17
Mandates.....	17
A collection run.....	18
When the money arrives.....	20
Bar and hall takings.....	22
Meetings and the AGM.....	24
Officers.....	26
Writing to the members.....	27
Reports.....	28
The dashboard afterwards.....	31
Quick reference.....	32
The treasurer's month.....	32
Try it yourself on the test drive.....	32

Welcome to QuiSuite Membership

QuiSuite Membership is a **Vertical Application**: a program made for one kind of organisation, built on the full QuiSuite accounts system. It is for sports clubs, social clubs, societies and associations: anyone who has members who pay a subscription.

13 current members in the Demo club	£440 collected by Direct Debit in one run	1 AGM coming up, with its notice and agenda
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In this guide you will:

- set the club up and decide its kinds of member and what each pays;
- keep the members, set up their subscriptions and invoice them;
- collect subscriptions by Direct Debit, start to finish;
- bank the bar and hall takings, run the AGM, and write to the members;
- see the reports and the dashboard that keep the committee informed.

Starting QuiSuite Membership



Figure 1. The splash screen



Figure 2. Logging in to Demo Membership

When QuiSuite Membership starts, its splash screen shows its own name under **Powered by QuiSuite Platform**, with the program and database versions. The login window then lists the companies it may open: on the test drive, **Demo Membership**. Log in as **Admin**, password **Admin**.

The main window

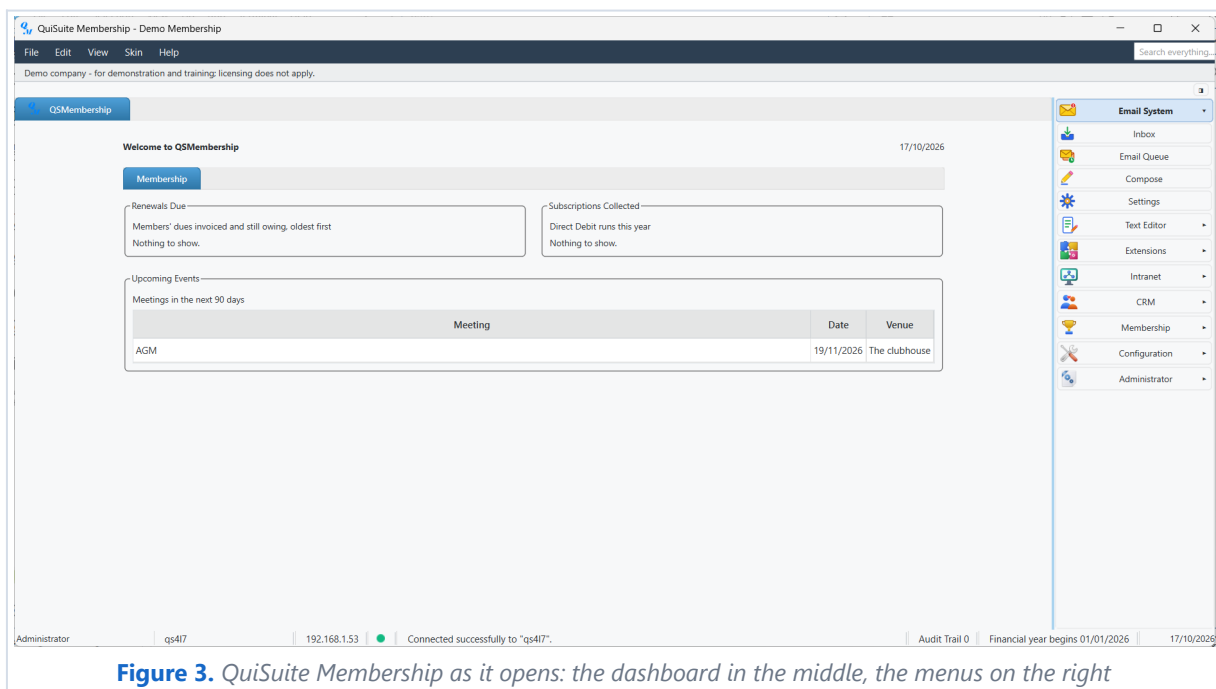


Figure 3. *QuiSuite Membership as it opens: the dashboard in the middle, the menus on the right*

The **dashboard** fills the middle: subscriptions due, Direct Debits collected this year and the meetings coming up. The **menus** are on the right: Email, the Text Editor, Extensions, the Intranet and the CRM, which every QuiSuite program shares, then **Membership**, the subject of this guide, then Configuration and Administrator.

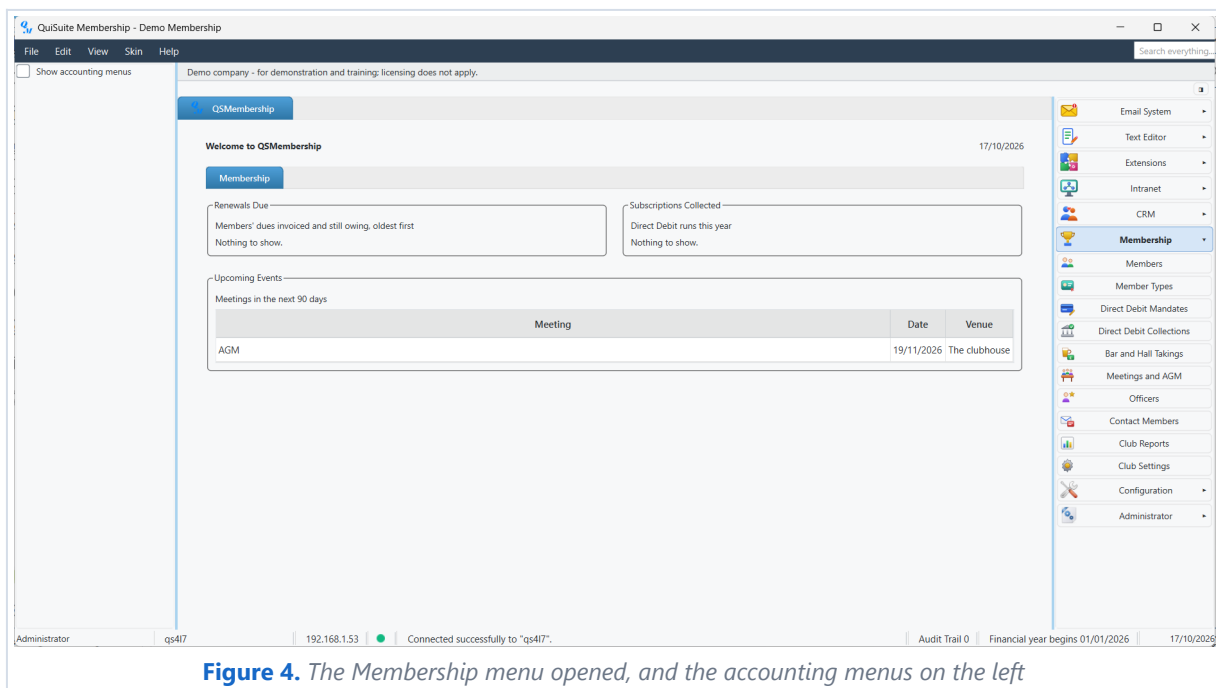


Figure 4. *The Membership menu opened, and the accounting menus on the left*

Click **Membership** and its items open beneath it: **Members, Member Types, Direct Debit Mandates, Direct Debit Collections, Bar and Hall Takings, Meetings and AGM, Officers, Contact Members, Club Reports** and **Club Settings**.

Behind the scenes every member has an account in a full accounts system, so every subscription invoiced and every payment received goes into the club's books for you. The accounting menus themselves stay out of the way on the left: press **F10** (or **Help > Toggle Menu**) and tick **Show accounting menus** to see them.

How a club's money works

Three ideas, and the rest of QuiSuite Membership follows from them.

1. Every member has an account

When you add a member, QuiSuite opens a **customer account** for them, exactly as a business would for a customer. Their subscription is invoiced to that account, and every payment they make, by Direct Debit, standing order, cash, card or cheque, is set against it. At any moment you can see who has paid and who still owes.

2. A subscription is a contract that renews

A member's **dues** come from their **member type** (full playing member: £120 a year; junior: £40; monthly: £10 a month). **Set Up Dues** turns that into a dues contract that renews every year by itself. **Contract Billing** then raises each period's invoice when it falls due, so nobody is forgotten and nobody is billed twice.

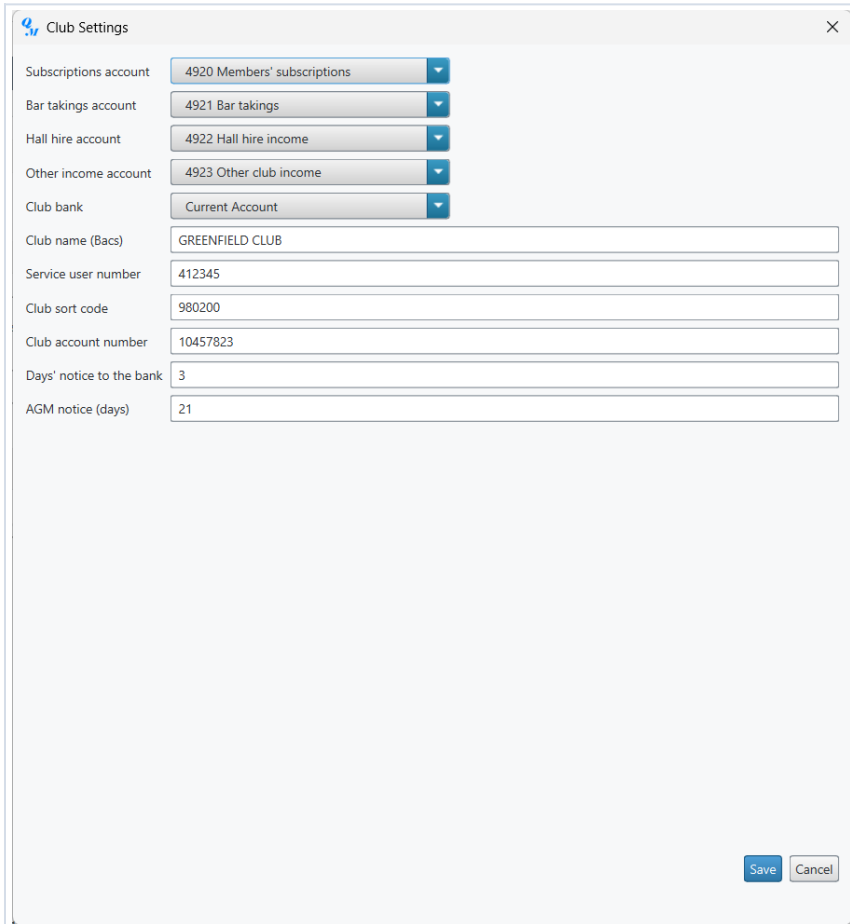
3. Direct Debit: the club collects, the member does nothing

A member who pays by Direct Debit signs a **mandate**: their permission for the club's bank to take the subscription from their account. When dues are owing, QuiSuite makes a **collection run**: one file, in the format the banks use (Bacs Standard 18), listing every member to collect from and how much. You send the file to the bank, the money arrives a few days later, and QuiSuite records each member as paid.

Payment method	What QuiSuite does
Direct Debit	Collects the dues invoices in a collection run, then posts each member's receipt.
Standing order	The member's bank pays the club; you see it on the bank statement and record it in the Sales Ledger.
Cash, card or cheque	Taken at the bar or by the treasurer; recorded against the member's account.

Setting up the club

Club Settings



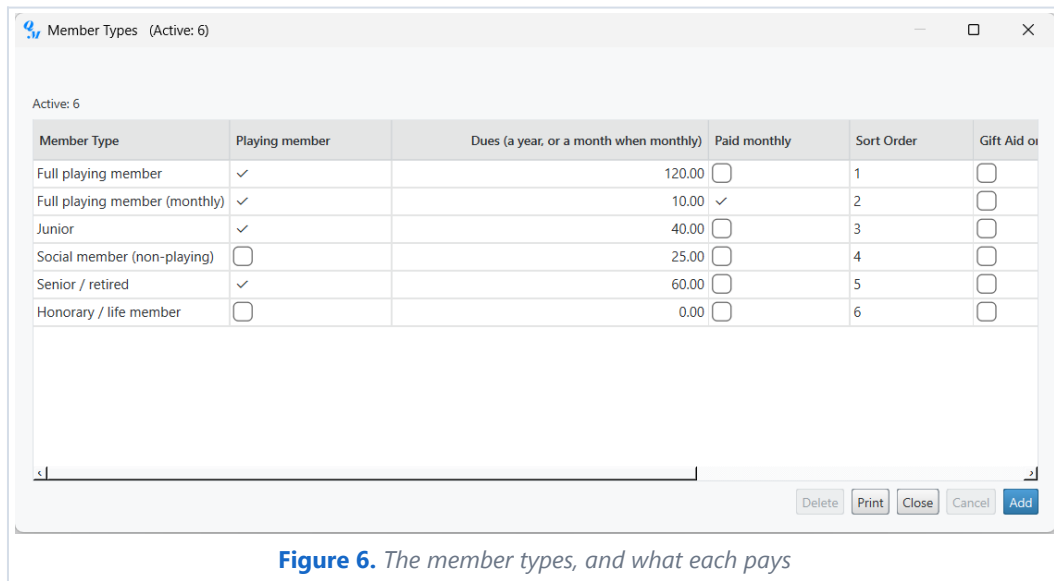
Subscriptions account	4920 Members' subscriptions
Bar takings account	4921 Bar takings
Hall hire account	4922 Hall hire income
Other income account	4923 Other club income
Club bank	Current Account
Club name (Bacs)	GREENFIELD CLUB
Service user number	412345
Club sort code	980200
Club account number	10457823
Days' notice to the bank	3
AGM notice (days)	21

Figure 5. Club Settings: where the money goes, and the club's Direct Debit details

Open **Membership > Club Settings** once, before anything else. The top part says which income account each kind of money goes to: **4920 Members' subscriptions**, **4921 Bar takings**, **4922 Hall hire income** and **4923 Other club income**, and the **club bank** they are paid into.

The rest is the club's Direct Debit details from its bank: the **club name** as it appears on members' bank statements (GREENFIELD CLUB, 18 characters at most), the **service user number** (412345), the **sort code and account** the money goes into, the **days' notice** the bank needs before a collection (3), and the **AGM notice** the rules require (21 days).

Member types



Active: 6

Member Type	Playing member	Dues (a year, or a month when monthly)	Paid monthly	Sort Order	Gift Aid or
Full playing member	☒	120.00	☐	1	☐
Full playing member (monthly)	☒	10.00	☒	2	☐
Junior	☒	40.00	☐	3	☐
Social member (non-playing)	☐	25.00	☐	4	☐
Senior / retired	☒	60.00	☐	5	☐
Honorary / life member	☐	0.00	☐	6	☐

Buttons: Delete, Print, Close, Cancel, Add

Figure 6. The member types, and what each pays

Membership > Member Types lists the kinds of member and their **dues**, a year or (ticked **Paid monthly**) a month. Greenfield has six: full playing (£120 a year), full playing monthly (£10 a month), junior (£40), social non-playing (£25), senior or retired (£60) and honorary or life members, who pay nothing. **Playing member** marks the types that play; the reports count them separately. **Gift Aid eligible** marks a type that gives no real benefits, so its subscriptions can be Gift Aided by a charity.

Members

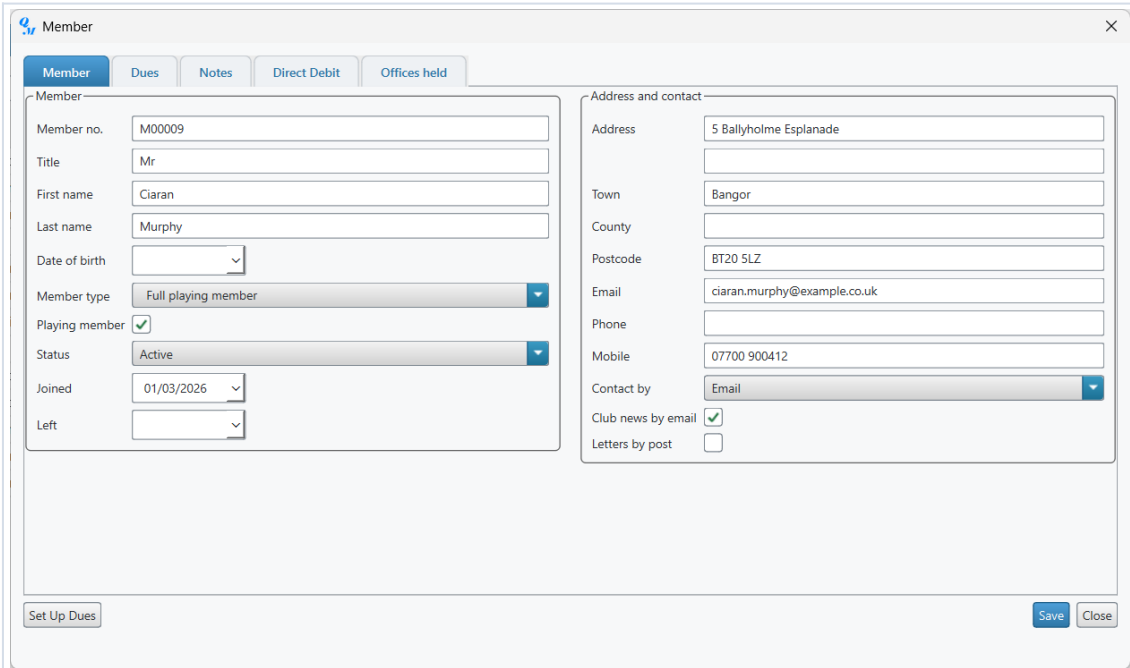
Open **Membership > Members**.

Q Membership Members												
New Modify Delete Print Refresh Search ☐ Current members only Close												
No.	Name	Type	Playing	Status	Joined	Contact by	Email	Mobile	Pays by	Mandate	Owing	f
M00013	Fiona Grant	Social member (non-playing)		Active	20/11/2025	Both	fiona.grant@example.co.uk		Standing Order		0.00	
M00012	Rachel Hamilton	Senior / retired	X	Active	01/09/2025	Both	rachel.hamilton@example.co.uk		Direct Debit	Live	0.00	
M00011	Mark Stewart	Full playing member (monthly)	X	Active	01/06/2026	Email	mark.stewart@example.co.uk	07700 900877	Direct Debit	Live	0.00	
M00010	Aoife Murphy	Junior	X	Active	12/04/2026	Post			Cash		0.00	
M00009	Ciaran Murphy	Full playing member	X	Active	01/03/2026	Email	ciaran.murphy@example.co.uk	07700 900412	Direct Debit	Live	0.00	
M00008	Joan Patterson	Full playing member	X	Active	15/05/2025	Email	joan.patterson@example.co.uk		Direct Debit	Live	0.00	
M00007	Alan Fraser	Honorary / life member		Honorary	15/04/2025	Email	alan.fraser@example.co.uk		Bank transfer		0.00	
M00006	Sophie Bell	Junior	X	Active	15/03/2025	Post			Cash		0.00	
M00005	Thomas Bell	Social member (non-playing)		Active	15/02/2025	Post			Cash		0.00	
M00004	Grace McAuley	Social member (non-playing)		Active	15/01/2025	Both	grace.mcauley@example.co.uk		Standing Order		0.00	
M00003	Robert Kerr	Senior / retired	X	Active	15/12/2024	Post			Cheque		0.00	
M00002	Helen Wilson	Full playing member (monthly)	X	Active	15/11/2024	Email	helen.wilson@example.co.uk		Direct Debit	Live	0.00	
M00001	David Wilson	Full playing member	X	Active	15/10/2024	Email	david.wilson@example.co.uk		Direct Debit	Live	0.00	

Figure 7. The members

Each row is a member: their number (M00001 and so on, given automatically), name, type, whether they play, their status (Active, Honorary, Lapsed or Resigned), when they joined, how they like to be contacted, how they pay, whether a Direct Debit mandate is live, and what they owe. **Current members only** is ticked, so the lapsed and resigned members (Brian Neill and Karen Doyle) are left out; untick it to see everyone who has ever belonged.

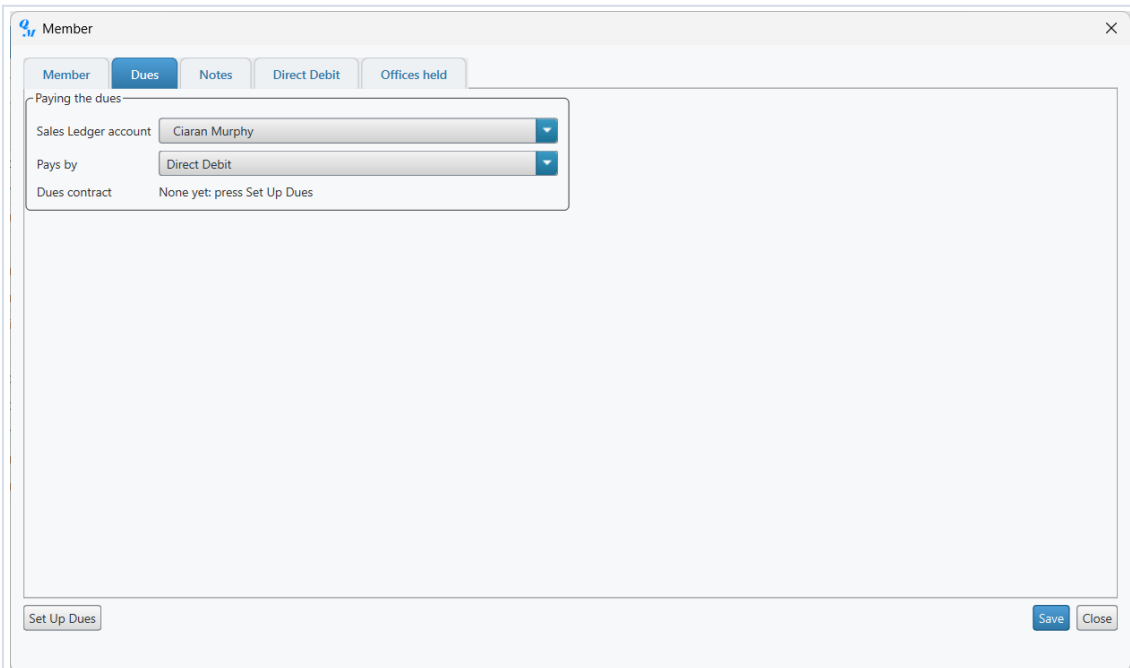
A member's record



The screenshot shows the 'Member' record form for Ciaran Murphy. The form is divided into two main sections: 'Member' and 'Address and contact'. The 'Member' section includes fields for Member no. (M00009), Title (Mr), First name (Ciaran), Last name (Murphy), Date of birth (dropdown), Member type (Full playing member), Playing member (checked), Status (Active), Joined (01/03/2026), and Left (dropdown). The 'Address and contact' section includes fields for Address (5 Ballyholme Esplanade), Town (Bangor), County (dropdown), Postcode (BT20 5LZ), Email (ciar.murphy@example.co.uk), Phone (dropdown), Mobile (07700 900412), Contact by (Email), Club news by email (checked), and Letters by post (unchecked). At the bottom, there are buttons for 'Set Up Dues', 'Save', and 'Close'.

Figure 8. Ciaran Murphy's record

Member holds who they are: number, name, date of birth (for juniors), member type, playing, status, and the dates they joined and left. **Address and contact** holds where they live and how they want to hear from the club: **Contact by** email, post or both, and whether they agreed to **club news by email** and **letters by post**. QuiSuite respects those choices when you write to the members.



The screenshot shows the 'Dues' page for Ciaran Murphy. The form is divided into two main sections: 'Paying the dues' and 'Set Up Dues'. The 'Paying the dues' section includes fields for Sales Ledger account (Ciaran Murphy), Pays by (Direct Debit), and Dues contract (None yet: press Set Up Dues). At the bottom, there are buttons for 'Set Up Dues', 'Save', and 'Close'.

Figure 9. The Dues page

Dues shows the member's **Sales Ledger account** (opened for them automatically), how they **pay**, and their **dues contract**. Ciaran has none yet: "None yet: press Set Up Dues".

Reference	Account name	Sort code	Account	Signed	Status
CLUBM00009	C MURPHY	980200	31457260	01/03/2026	Live

Figure 10. The Direct Debit page

Direct Debit lists the member's mandates: Ciaran signed one on 01/03/2026, and it is **Live**. **Offices held** lists any office they have held on the committee.

Adding a member

Member

Member no.

Title

First name

Last name

Date of birth

Member type

Playing member ☒

Status

Joined

Left

Address and contact

Address

Town

County

Postcode

Email

Phone

Mobile

Contact by

Club news by email ☐

Letters by post ☒

Figure 11. A new member, filled in

Press **New** in the members list and fill in their details. Choosing the **member type** ticks **Playing member** for you. Press **Save**: the member number is given, their account is opened and, for a new member, their dues contract is set up straight away.

Subscriptions

Setting up the dues

The dues contract is made: Contract Billing invoices it, and the renewal reminders come from Service Contracts.

Member | Dues | Notes | Direct Debit | Offices held

Member

Member no. M00001

Title Mr

First name David

Last name Wilson

Date of birth

Member type Full playing member

Playing member ☒

Status Active

Joined 15/10/2024

Left

Address and contact

Address 14 Green Road

Town Bangor

County

Postcode BT20 4AB

Email david.wilson@example.co.uk

Phone

Mobile

Contact by Email

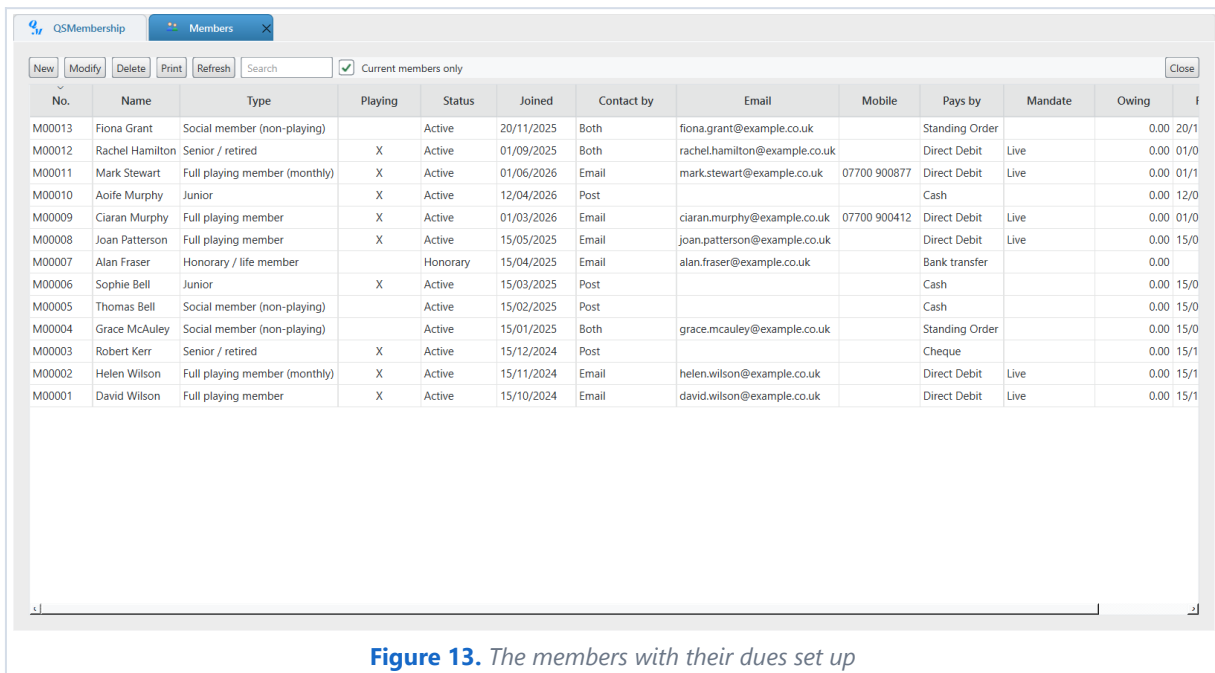
Club news by email ☒

Letters by post ☒

Set Up Dues Save Close

Figure 12. Set Up Dues: the member's dues contract made

A club starting with QuiSuite already has members. Open each one who pays and press **Set Up Dues**: QuiSuite makes the dues contract from their member type and says so at the top. It starts from the member's **current** year of membership, the latest anniversary of the day they joined, so David Wilson, who joined on 15/10/2024, is billed from 15/10/2026: this year's subscription, not every year since he joined.



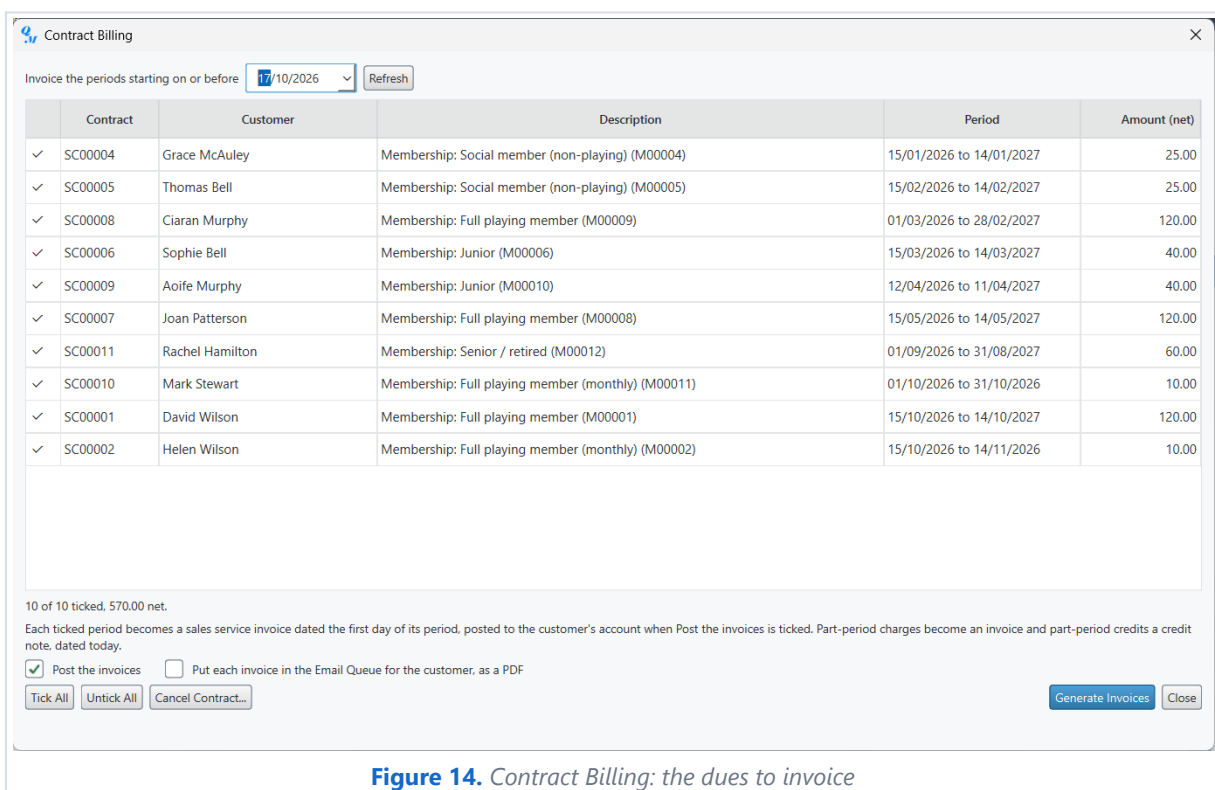
The screenshot shows the 'Members' window in the QSMembership software. It features a table with columns for No., Name, Type, Playing, Status, Joined, Contact by, Email, Mobile, Pays by, Mandate, Owing, and a final column with a small 'f' icon. The table lists 16 members, including Fiona Grant, Rachel Hamilton, Mark Stewart, Aoife Murphy, Ciaran Murphy, Joan Patterson, Alan Fraser, Sophie Bell, Thomas Bell, Grace McAuley, Robert Kerr, Helen Wilson, and David Wilson. Each member's record shows their membership type, status, join date, contact information, payment method, and the amount owed.

No.	Name	Type	Playing	Status	Joined	Contact by	Email	Mobile	Pays by	Mandate	Owing	f
M00013	Fiona Grant	Social member (non-playing)		Active	20/11/2025	Both	fiona.grant@example.co.uk		Standing Order		0.00	20/1
M00012	Rachel Hamilton	Senior / retired	X	Active	01/09/2025	Both	rachel.hamilton@example.co.uk		Direct Debit	Live	0.00	01/0
M00011	Mark Stewart	Full playing member (monthly)	X	Active	01/06/2026	Email	mark.stewart@example.co.uk	07700 900877	Direct Debit	Live	0.00	01/1
M00010	Aoife Murphy	Junior	X	Active	12/04/2026	Post			Cash		0.00	12/0
M00009	Ciaran Murphy	Full playing member	X	Active	01/03/2026	Email	ciaran.murphy@example.co.uk	07700 900412	Direct Debit	Live	0.00	01/0
M00008	Joan Patterson	Full playing member	X	Active	15/05/2025	Email	joan.patterson@example.co.uk		Direct Debit	Live	0.00	15/0
M00007	Alan Fraser	Honorary / life member		Honorary	15/04/2025	Email	alan.fraser@example.co.uk		Bank transfer		0.00	
M00006	Sophie Bell	Junior	X	Active	15/03/2025	Post			Cash		0.00	15/0
M00005	Thomas Bell	Social member (non-playing)		Active	15/02/2025	Post			Cash		0.00	15/0
M00004	Grace McAuley	Social member (non-playing)		Active	15/01/2025	Both	grace.mcauley@example.co.uk		Standing Order		0.00	15/0
M00003	Robert Kerr	Senior / retired	X	Active	15/12/2024	Post			Cheque		0.00	15/1
M00002	Helen Wilson	Full playing member (monthly)	X	Active	15/11/2024	Email	helen.wilson@example.co.uk		Direct Debit	Live	0.00	15/1
M00001	David Wilson	Full playing member	X	Active	15/10/2024	Email	david.wilson@example.co.uk		Direct Debit	Live	0.00	15/1

Figure 13. The members with their dues set up

Invoicing the dues: Contract Billing

When dues fall due, QuiSuite shows a notice bar at the top of the window: "service contract invoices are due", with a **Generate...** button. It opens **Contract Billing**:



The screenshot shows the 'Contract Billing' window. It has a header with the title 'Contract Billing' and a close button. Below the header, there is a section for 'Invoice the periods starting on or before' with a date picker set to '17/10/2026' and a 'Refresh' button. The main area contains a table with columns for Contract, Customer, Description, Period, and Amount (net). The table lists 12 contracts, each with a checkmark in the first column. Below the table, there is a summary line: '10 of 10 ticked, 570.00 net.' followed by a detailed note about the invoicing process. At the bottom, there are checkboxes for 'Post the invoices' (checked) and 'Put each invoice in the Email Queue for the customer, as a PDF' (unchecked), along with buttons for 'Tick All', 'Untick All', 'Cancel Contract...', 'Generate Invoices', and 'Close'.

Contract	Customer	Description	Period	Amount (net)
✓ SC00004	Grace McAuley	Membership: Social member (non-playing) (M00004)	15/01/2026 to 14/01/2027	25.00
✓ SC00005	Thomas Bell	Membership: Social member (non-playing) (M00005)	15/02/2026 to 14/02/2027	25.00
✓ SC00008	Ciaran Murphy	Membership: Full playing member (M00009)	01/03/2026 to 28/02/2027	120.00
✓ SC00006	Sophie Bell	Membership: Junior (M00006)	15/03/2026 to 14/03/2027	40.00
✓ SC00009	Aoife Murphy	Membership: Junior (M00010)	12/04/2026 to 11/04/2027	40.00
✓ SC00007	Joan Patterson	Membership: Full playing member (M00008)	15/05/2026 to 14/05/2027	120.00
✓ SC00011	Rachel Hamilton	Membership: Senior / retired (M00012)	01/09/2026 to 31/08/2027	60.00
✓ SC00010	Mark Stewart	Membership: Full playing member (monthly) (M00011)	01/10/2026 to 31/10/2026	10.00
✓ SC00001	David Wilson	Membership: Full playing member (M00001)	15/10/2026 to 14/10/2027	120.00
✓ SC00002	Helen Wilson	Membership: Full playing member (monthly) (M00002)	15/10/2026 to 14/11/2026	10.00

Figure 14. Contract Billing: the dues to invoice

Each row is one member's subscription for one period: ten periods, £570 in all. Every row is ticked to begin with; untick any to leave it for later. **Post the invoices** is ticked, so each invoice goes straight to the member's account. Press **Generate Invoices**.

Contract Billing

Invoice the periods starting on or before

10 invoice(s) created and posted.

Contract	Customer	Description	Period	Amount (net)
----------	----------	-------------	--------	--------------

No contract invoices are due.

Each ticked period becomes a sales service invoice dated the first day of its period, posted to the customer's account when Post the invoices is ticked. Part-period charges become an invoice and part-period credits a credit note, dated today.

☒ Post the invoices ☐ Put each invoice in the Email Queue for the customer, as a PDF

Figure 15. The dues invoiced and posted

"10 invoice(s) created and posted." Nothing more is due, so the list is empty. Each member now owes their subscription:

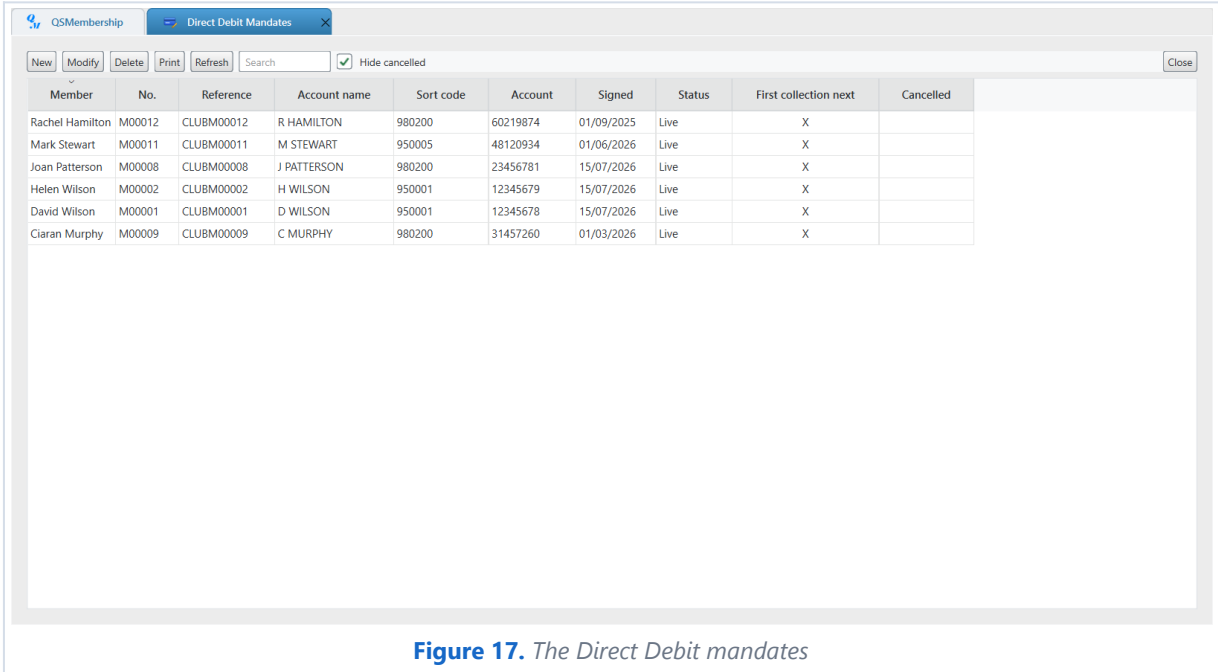
No.	Name	Type	Playing	Status	Joined	Contact by	Email	Mobile	Pays by	Mandate	Owing	f
M00013	Fiona Grant	Social member (non-playing)		Active	20/11/2025	Both	fiona.grant@example.co.uk		Standing Order		0.00	20/1
M00012	Rachel Hamilton	Senior / retired	X	Active	01/09/2025	Both	rachel.hamilton@example.co.uk		Direct Debit	Live	60.00	01/0
M00011	Mark Stewart	Full playing member (monthly)	X	Active	01/06/2026	Email	mark.stewart@example.co.uk	07700 900877	Direct Debit	Live	10.00	01/1
M00010	Aoife Murphy	Junior	X	Active	12/04/2026	Post			Cash		40.00	12/0
M00009	Ciaran Murphy	Full playing member	X	Active	01/03/2026	Email	ciaran.murphy@example.co.uk	07700 900412	Direct Debit	Live	120.00	01/0
M00008	Joan Patterson	Full playing member	X	Active	15/05/2025	Email	joan.patterson@example.co.uk		Direct Debit	Live	120.00	15/0
M00007	Alan Fraser	Honorary / life member		Honorary	15/04/2025	Email	alan.fraser@example.co.uk		Bank transfer		0.00	
M00006	Sophie Bell	Junior	X	Active	15/03/2025	Post			Cash		40.00	15/0
M00005	Thomas Bell	Social member (non-playing)		Active	15/02/2025	Post			Cash		25.00	15/0
M00004	Grace McAuley	Social member (non-playing)		Active	15/01/2025	Both	grace.mcauley@example.co.uk		Standing Order		25.00	15/0
M00003	Robert Kerr	Senior / retired	X	Active	15/12/2024	Post			Cheque		0.00	15/1
M00002	Helen Wilson	Full playing member (monthly)	X	Active	15/11/2024	Email	helen.wilson@example.co.uk		Direct Debit	Live	10.00	15/1
M00001	David Wilson	Full playing member	X	Active	15/10/2024	Email	david.wilson@example.co.uk		Direct Debit	Live	120.00	15/1

Figure 16. The members, with what each owes

The **Owing** column shows it: £120 for a full playing member, £10 for a monthly one, and so on. Alan Fraser, an honorary member, owes nothing.

Direct Debits

Mandates



Member	No.	Reference	Account name	Sort code	Account	Signed	Status	First collection next	Cancelled
Rachel Hamilton	M00012	CLUBM00012	R HAMILTON	980200	60219874	01/09/2025	Live	X	
Mark Stewart	M00011	CLUBM00011	M STEWART	950005	48120934	01/06/2026	Live	X	
Joan Patterson	M00008	CLUBM00008	J PATTERSON	980200	23456781	15/07/2026	Live	X	
Helen Wilson	M00002	CLUBM00002	H WILSON	950001	12345679	15/07/2026	Live	X	
David Wilson	M00001	CLUBM00001	D WILSON	950001	12345678	15/07/2026	Live	X	
Ciaran Murphy	M00009	CLUBM00009	C MURPHY	980200	31457260	01/03/2026	Live	X	

Figure 17. The Direct Debit mandates

Membership > Direct Debit Mandates lists every live mandate: the member, the **reference** that appears on their bank statement (CLUBM00009 for Ciaran Murphy), the name on their account, sort code, account number, the date they signed and whether the next collection is their **first** (the bank marks a first collection differently). **Hide cancelled** leaves out mandates that have been stopped, such as Brian Neill's when his membership lapsed.

Figure 18. A mandate

A mandate holds exactly what the bank needs. QuiSuite keeps only the digits of the sort code and account, puts the account name in the capitals the banks use, and makes the reference from the member's number.

A collection run

Member	Reference	Invoice	Invoice date	Code	Amount
Rachel Hamilton (M00012)	CLUBM00012	2094	01/09/2026	01 first	60.00
Ciaran Murphy (M00009)	CLUBM00009	2091	01/03/2026	01 first	120.00
Joan Patterson (M00008)	CLUBM00008	2090	15/05/2026	01 first	120.00
Mark Stewart (M00011)	CLUBM00011	2093	01/10/2026	01 first	10.00
David Wilson (M00001)	CLUBM00001	2085	15/10/2026	01 first	120.00
Helen Wilson (M00002)	CLUBM00002	2086	15/10/2026	01 first	10.00

6 collection(s), 440.00 in all.

☐ Not yet posted

None.

Run	Collect on	Collections	Total	Status	File	Bank	Receipts posted

Figure 19. The Direct Debits due

Open **Membership > Direct Debit Collections**. **Collect on** is the day the money will come out of members' accounts: today plus the bank's notice, here 22/10/2026. **Show Due** lists

every dues invoice owing from a member with a live mandate: six collections, £440. Code **01** marks each one as the first under its mandate.

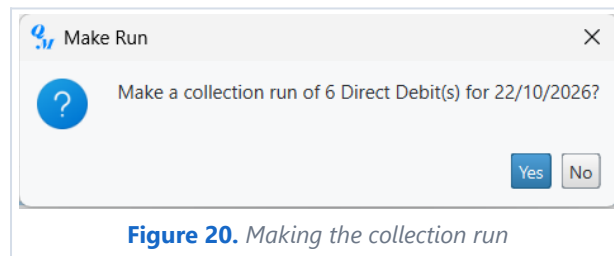


Figure 20. Making the collection run

Press **Make Run** and answer **Yes**.

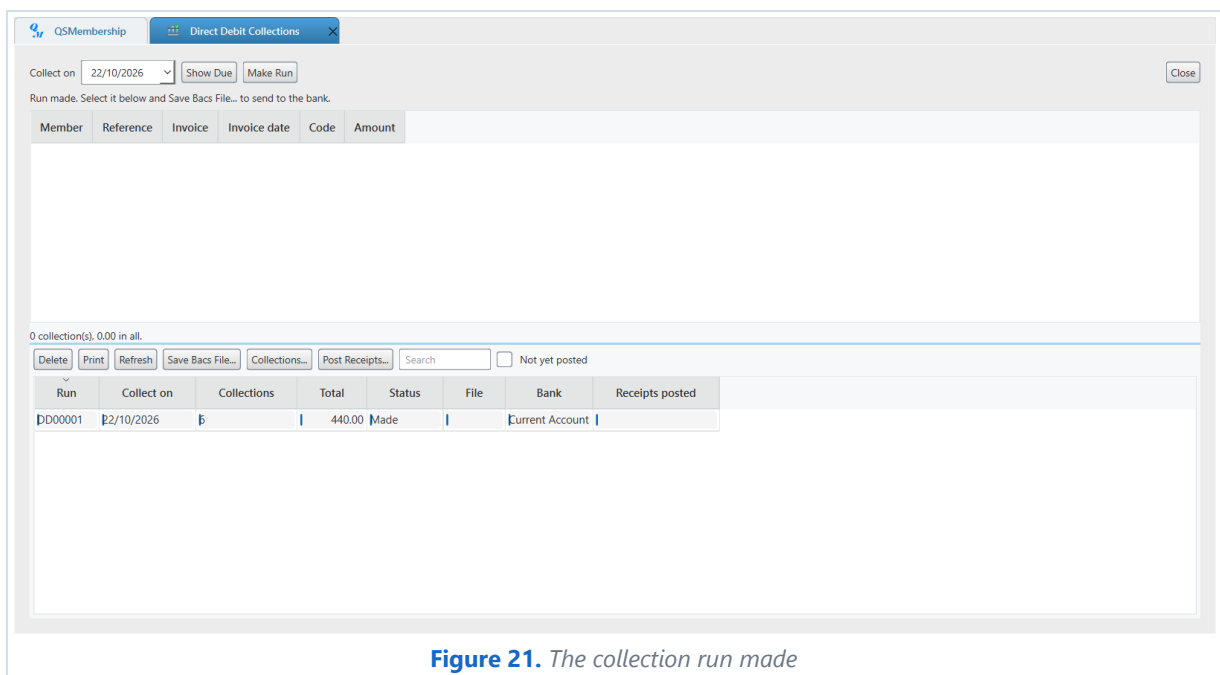
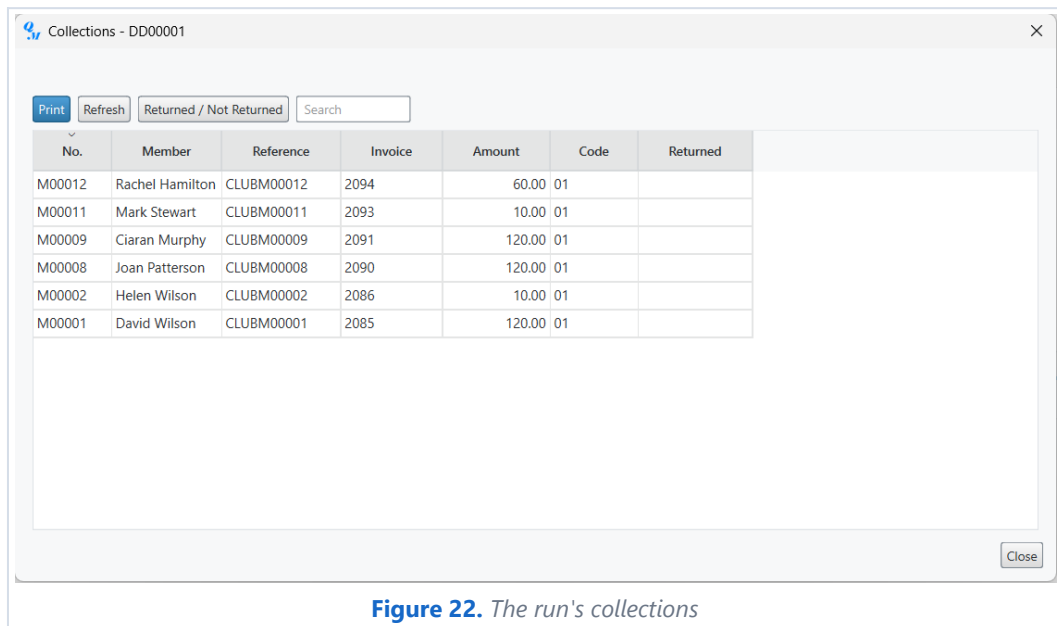


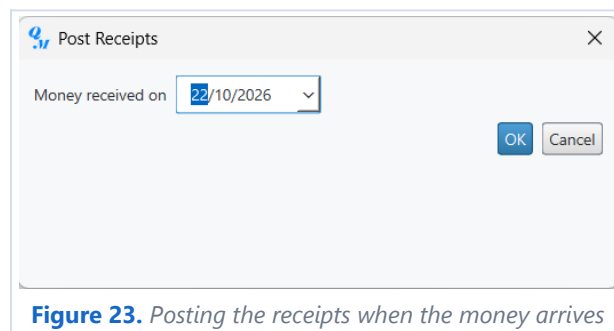
Figure 21. The collection run made

Run **DD00001** appears at the bottom: six collections, £440, status **Made**. Select it and press **Save Bacs File...** to save the Bacs Standard 18 file, and send it to the bank or bureau the way they ask.

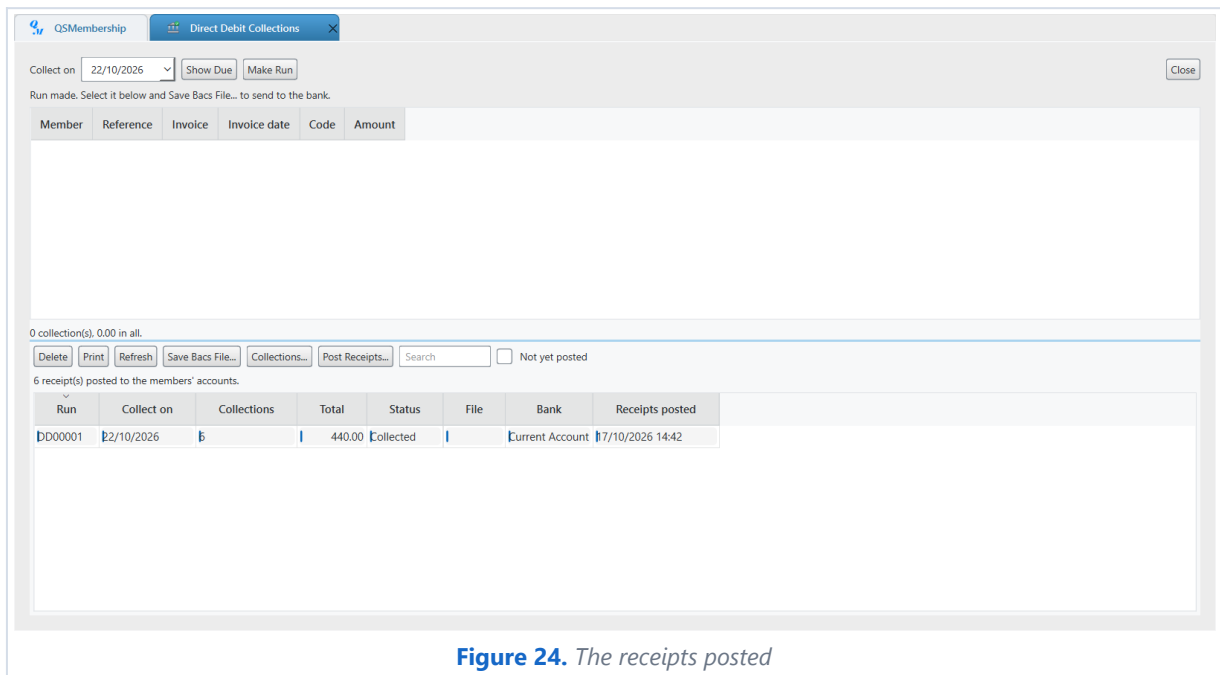


Collections... lists the run's collections. If the bank says one was returned (the member had cancelled it at their bank, say), select it and press **Returned / Not Returned**: it is left out when the receipts are posted, and that member still owes.

When the money arrives

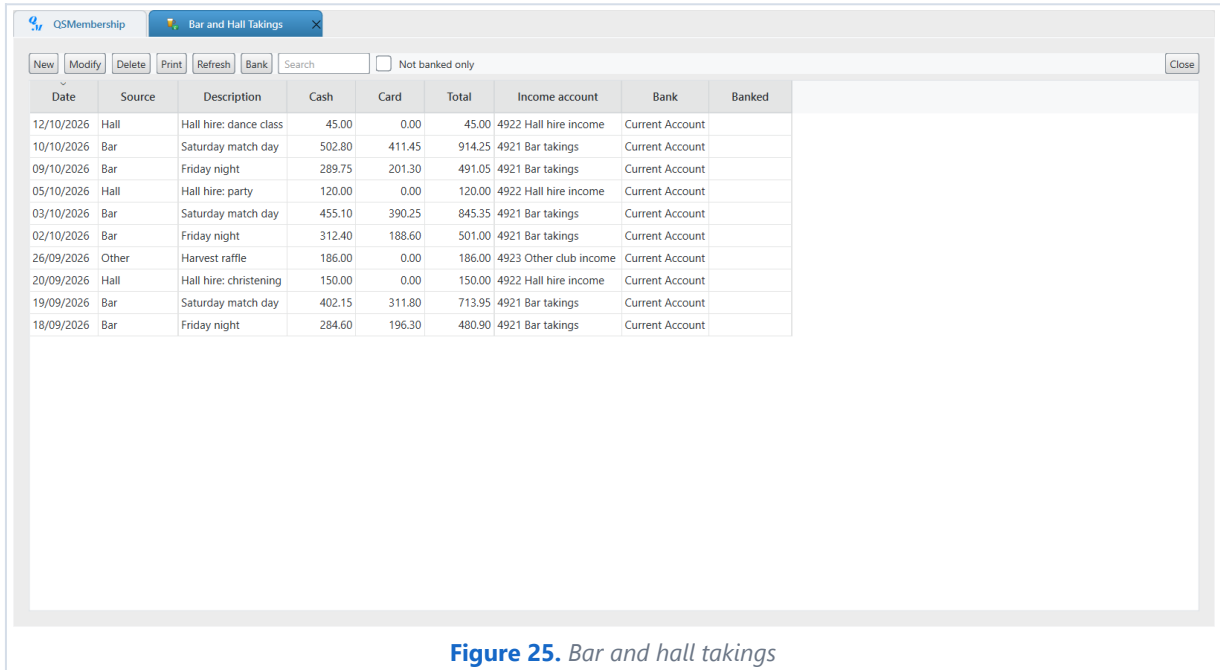


When the money reaches the club's bank, press **Post Receipts...** and give the date it arrived.



"6 receipt(s) posted to the members' accounts." The run is **Collected**: each member has paid, and the £440 is in the club's bank in the accounts.

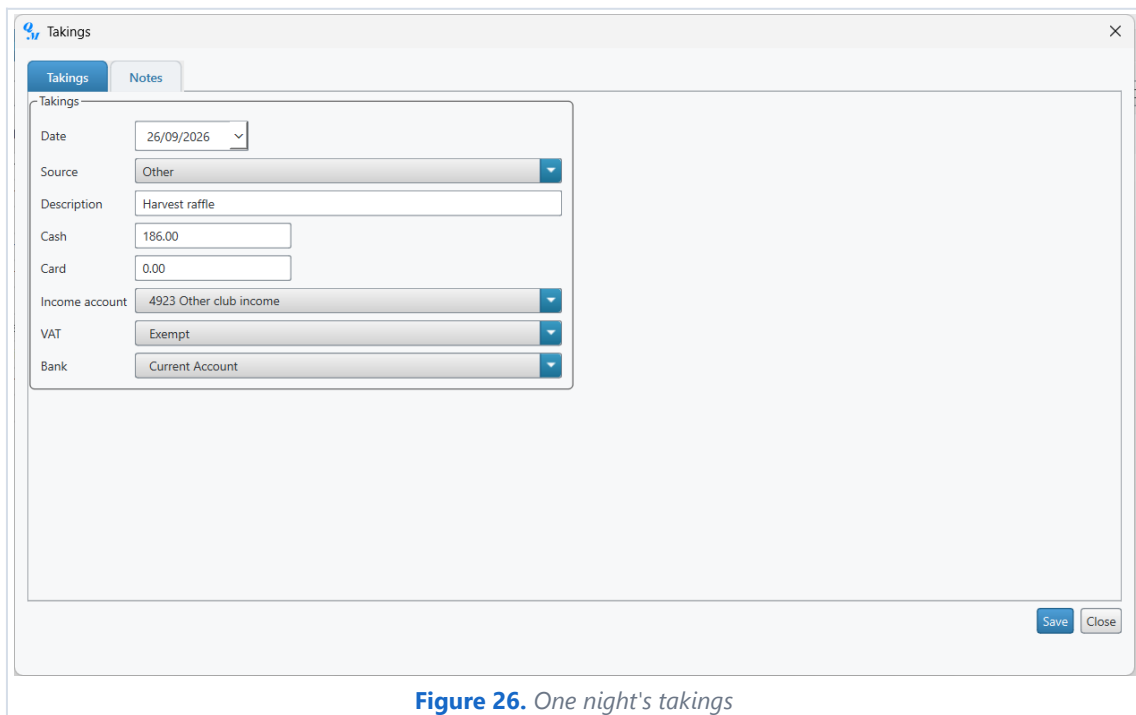
Bar and hall takings



Date	Source	Description	Cash	Card	Total	Income account	Bank	Banked
12/10/2026	Hall	Hall hire: dance class	45.00	0.00	45.00	4922 Hall hire income	Current Account	
10/10/2026	Bar	Saturday match day	502.80	411.45	914.25	4921 Bar takings	Current Account	
09/10/2026	Bar	Friday night	289.75	201.30	491.05	4921 Bar takings	Current Account	
05/10/2026	Hall	Hall hire: party	120.00	0.00	120.00	4922 Hall hire income	Current Account	
03/10/2026	Bar	Saturday match day	455.10	390.25	845.35	4921 Bar takings	Current Account	
02/10/2026	Bar	Friday night	312.40	188.60	501.00	4921 Bar takings	Current Account	
26/09/2026	Other	Harvest raffle	186.00	0.00	186.00	4923 Other club income	Current Account	
20/09/2026	Hall	Hall hire: christening	150.00	0.00	150.00	4922 Hall hire income	Current Account	
19/09/2026	Bar	Saturday match day	402.15	311.80	713.95	4921 Bar takings	Current Account	
18/09/2026	Bar	Friday night	284.60	196.30	480.90	4921 Bar takings	Current Account	

Figure 25. Bar and hall takings

Membership > Bar and Hall Takings records what the bar, the hall and anything else took each day: the date, where it came from (**Bar**, **Hall** or **Other**), a description, the cash and the card takings, the total, and the income account it goes to.



Takings

Notes

Takings

Date: 26/09/2026

Source: Other

Description: Harvest raffle

Cash: 186.00

Card: 0.00

Income account: 4923 Other club income

VAT: Exempt

Bank: Current Account

Save Close

Figure 26. One night's takings

Each kind goes to its own account automatically: the harvest raffle's £186 cash is **Other**, so it goes to **4923 Other club income**. VAT is set for each one; subscriptions and raffles are usually exempt.

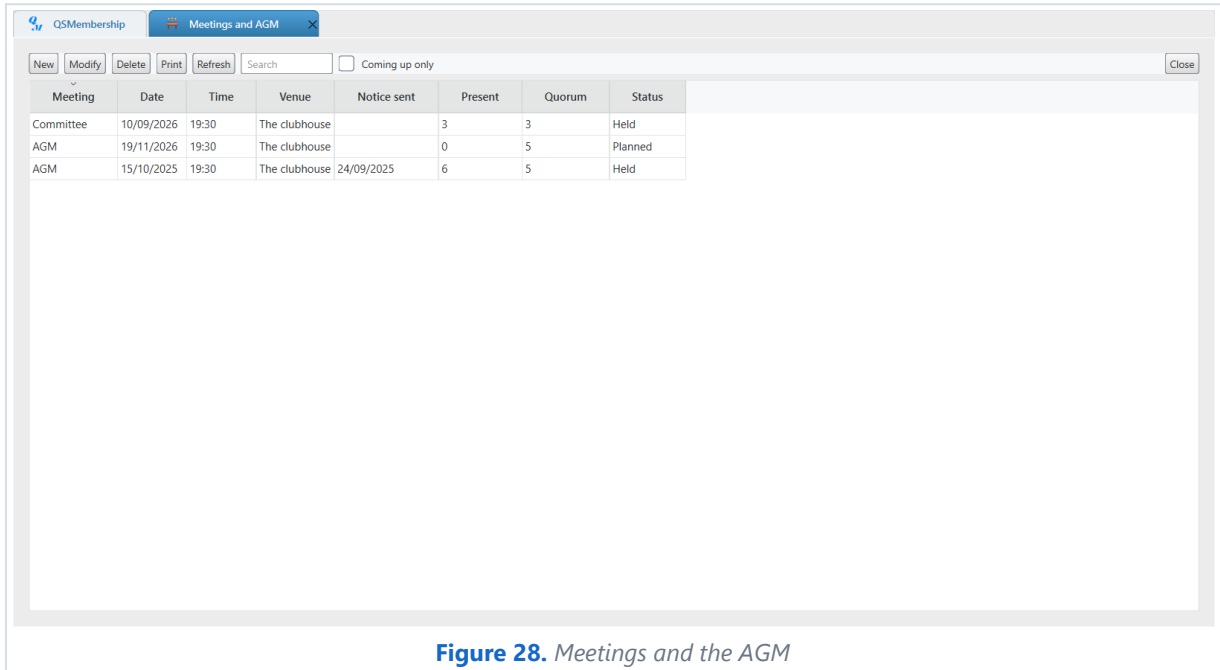
Banked: a bank receipt is posted.

Date	Source	Description	Cash	Card	Total	Income account	Bank	Banked
12/10/2026	Hall	Hall hire: dance class	45.00	0.00	45.00	4922 Hall hire income	Current Account	
10/10/2026	Bar	Saturday match day	502.80	411.45	914.25	4921 Bar takings	Current Account	X
09/10/2026	Bar	Friday night	289.75	201.30	491.05	4921 Bar takings	Current Account	
05/10/2026	Hall	Hall hire: party	120.00	0.00	120.00	4922 Hall hire income	Current Account	
03/10/2026	Bar	Saturday match day	455.10	390.25	845.35	4921 Bar takings	Current Account	
02/10/2026	Bar	Friday night	312.40	188.60	501.00	4921 Bar takings	Current Account	
26/09/2026	Other	Harvest raffle	186.00	0.00	186.00	4923 Other club income	Current Account	
20/09/2026	Hall	Hall hire: christening	150.00	0.00	150.00	4922 Hall hire income	Current Account	
19/09/2026	Bar	Saturday match day	402.15	311.80	713.95	4921 Bar takings	Current Account	
18/09/2026	Bar	Friday night	284.60	196.30	480.90	4921 Bar takings	Current Account	

Figure 27. Takings banked

When the takings go into the bank, select them and press **Bank**: QuiSuite posts a **bank receipt** to the club bank and the income account, and ticks them **Banked**. Here the Saturday match day takings of £914.25 have been banked. **Not banked only** shows what is still in the safe.

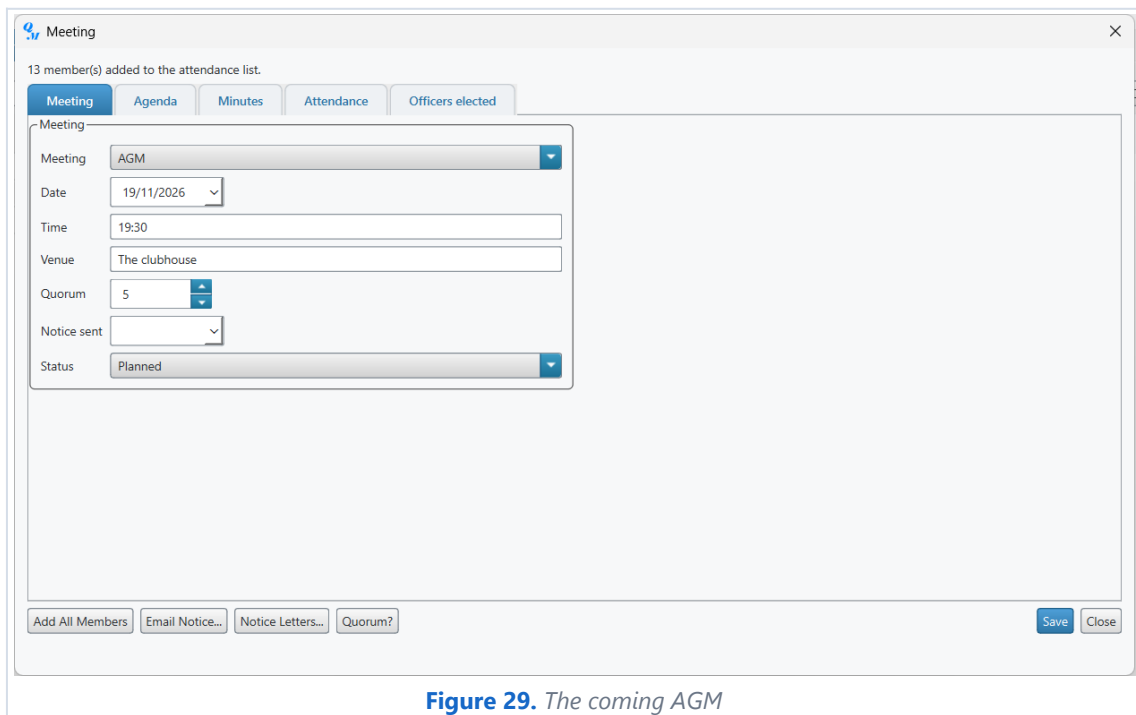
Meetings and the AGM



Meeting	Date	Time	Venue	Notice sent	Present	Quorum	Status
Committee	10/09/2026	19:30	The clubhouse		3	3	Held
AGM	19/11/2026	19:30	The clubhouse		0	5	Planned
AGM	15/10/2025	19:30	The clubhouse	24/09/2025	6	5	Held

Figure 28. Meetings and the AGM

Membership > Meetings and AGM keeps every meeting: committee meetings, AGMs and EGMs. The list shows when and where each is, when its notice went out, how many were present and the **quorum**, the number the rules require for the meeting to make decisions.



13 member(s) added to the attendance list.

Meeting

Meeting: AGM

Date: 19/11/2026

Time: 19:30

Venue: The clubhouse

Quorum: 5

Notice sent:

Status: Planned

Add All Members Email Notice... Notice Letters... Quorum? Save Close

Figure 29. The coming AGM

The AGM on 19/11/2026 is **Planned**, at 19:30 in the clubhouse, with a quorum of 5. **Add All Members** has put every current member on the attendance list: "13 member(s) added".



Figure 30. *Its agenda*

The **Agenda** page holds the business of the meeting; the **Minutes** page records what was decided, once it has been held.

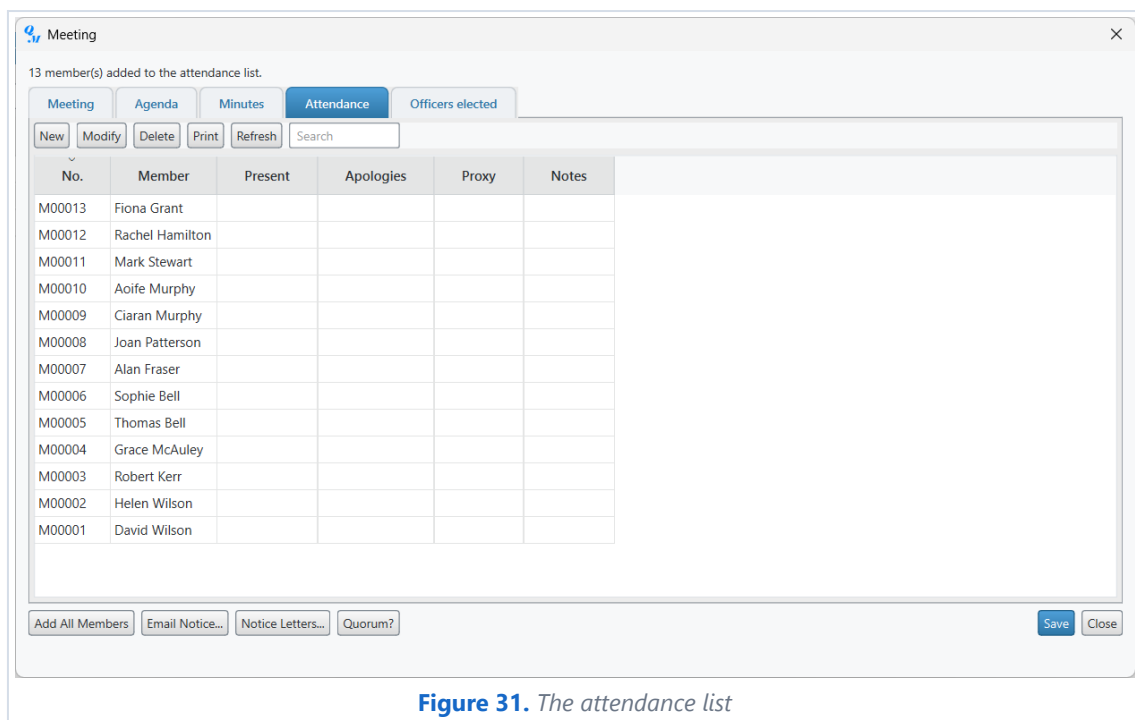
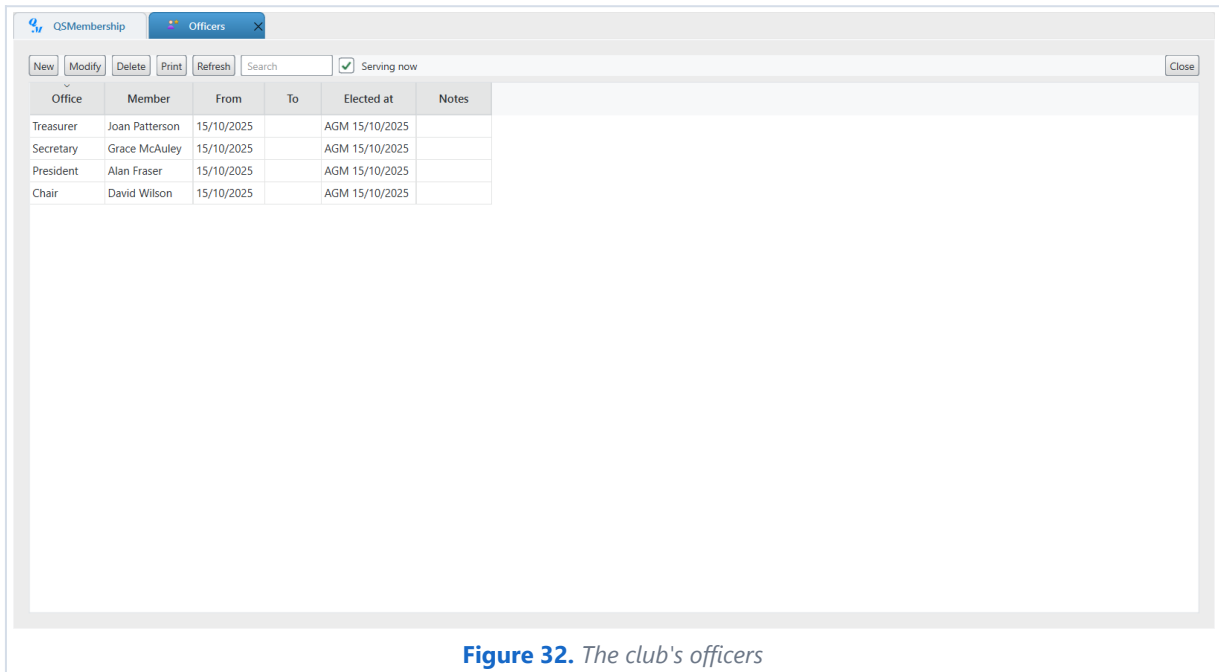


Figure 31. *The attendance list*

On the night, tick who is **present**, who sent **apologies** and who voted by **proxy**. **Quorum?** counts them against the quorum. **Email Notice...** sends the notice to every member who

takes email; **Notice Letters...** prints it for those written to by post. **Officers elected** records who was elected to which office.

Officers



The screenshot shows the 'Officers' page in the QuiSuite application. At the top, there's a header bar with 'QMembership' and 'Officers'. Below this is a toolbar with buttons for 'New', 'Modify', 'Delete', 'Print', and 'Refresh', along with a search box and a 'Serving now' checkbox. The main content area contains a table with the following data:

Office	Member	From	To	Elected at	Notes
Treasurer	Joan Patterson	15/10/2025		AGM 15/10/2025	
Secretary	Grace McAuley	15/10/2025		AGM 15/10/2025	
President	Alan Fraser	15/10/2025		AGM 15/10/2025	
Chair	David Wilson	15/10/2025		AGM 15/10/2025	

Figure 32. *The club's officers*

Membership > Officers lists the committee: Greenfield's chair is David Wilson, its president Alan Fraser, its secretary Grace McAuley and its treasurer Joan Patterson, all elected at the AGM of 15/10/2025. **Serving now** leaves out officers who have stood down.

Writing to the members

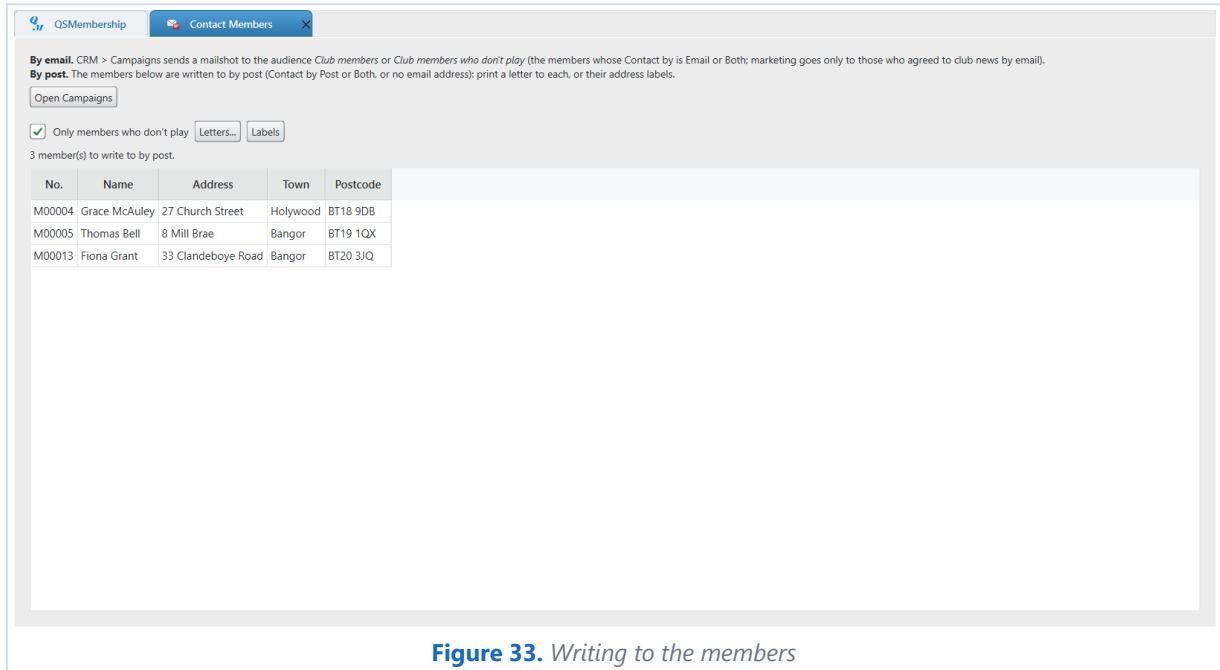


Figure 33. *Writing to the members*

Membership > Contact Members reaches every member the way they asked. **By email:** **Open Campaigns** opens the CRM's mailshots, with the club's members as the audience; only members who agreed to club news by email are sent marketing. **By post:** the list below holds the members to write to by post (here, with **Only members who don't play** ticked, three). **Letters...** writes one letter and prints it for each of them, and **Labels** prints their addresses on sticky labels.

Reports

Open **Membership > Club Reports**, choose a report and the dates, and press **Run**. **Print** prints it and **Excel...** saves it as a spreadsheet.

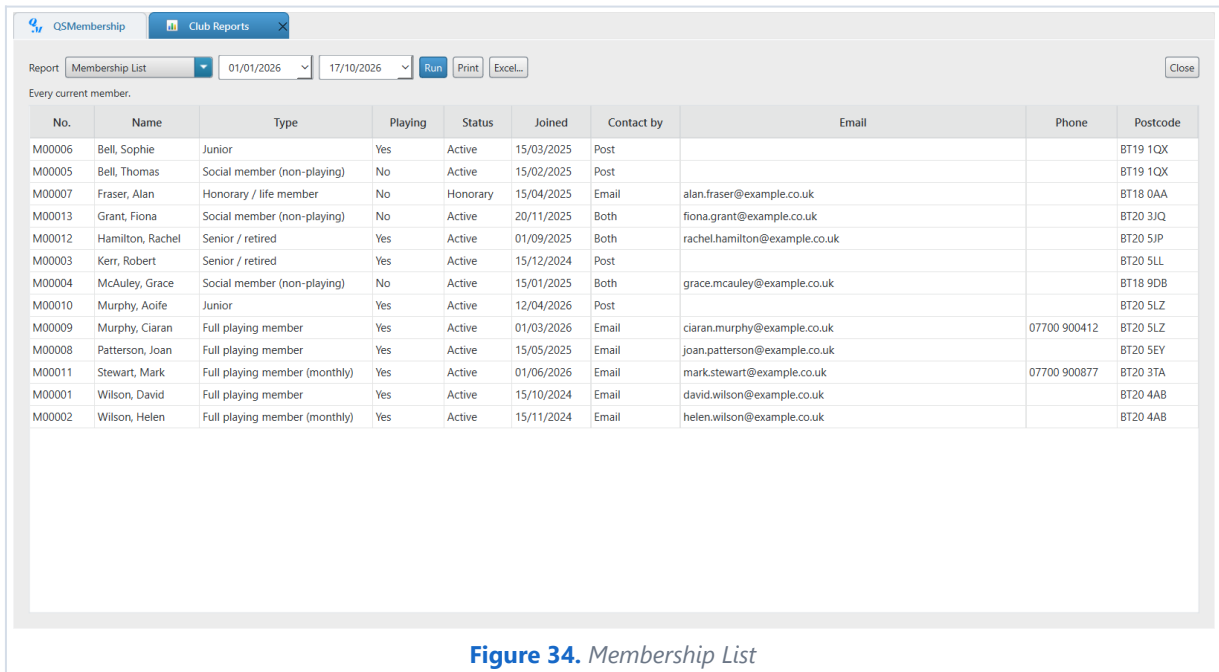


Figure 34. Membership List

Membership List: every current member, their type, whether they play, their status, when they joined and how to reach them.

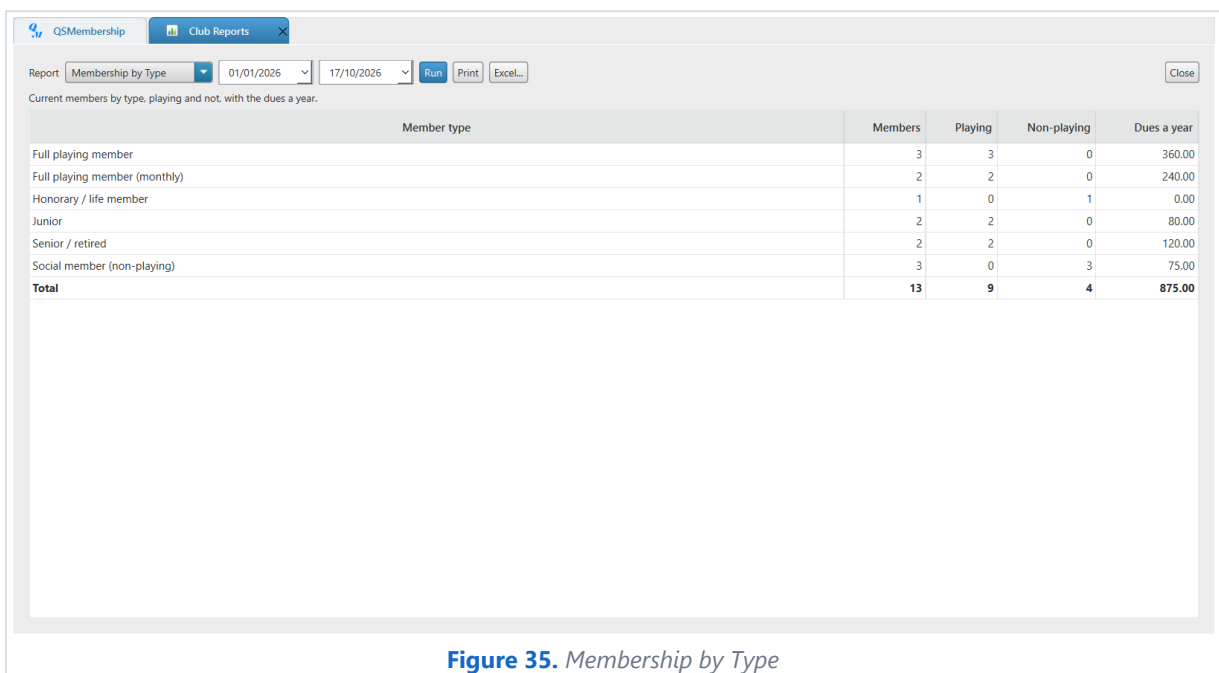


Figure 35. Membership by Type

Membership by Type: how many members of each type, playing and not, and the dues they bring in a year: 13 members, 9 of them playing, £875 a year.

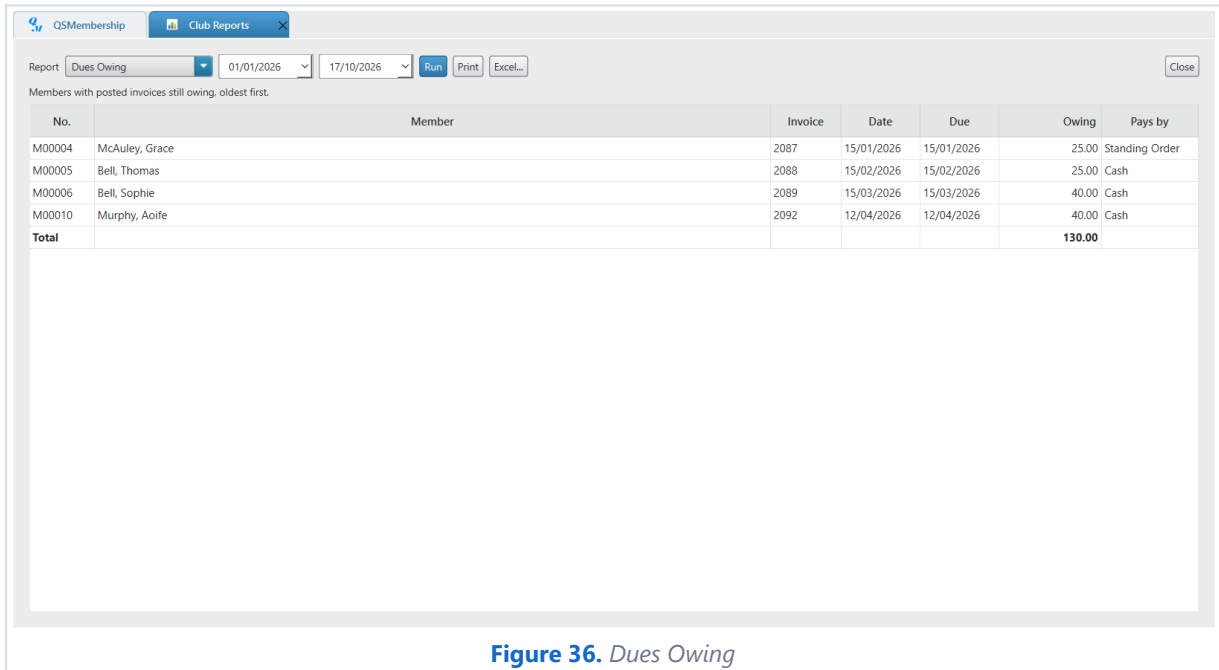


Figure 36. Dues Owing

Dues Owing: members with subscriptions invoiced and still unpaid, oldest first: here four members who pay by cash or standing order, £130 in all. This is the treasurer's chasing list.

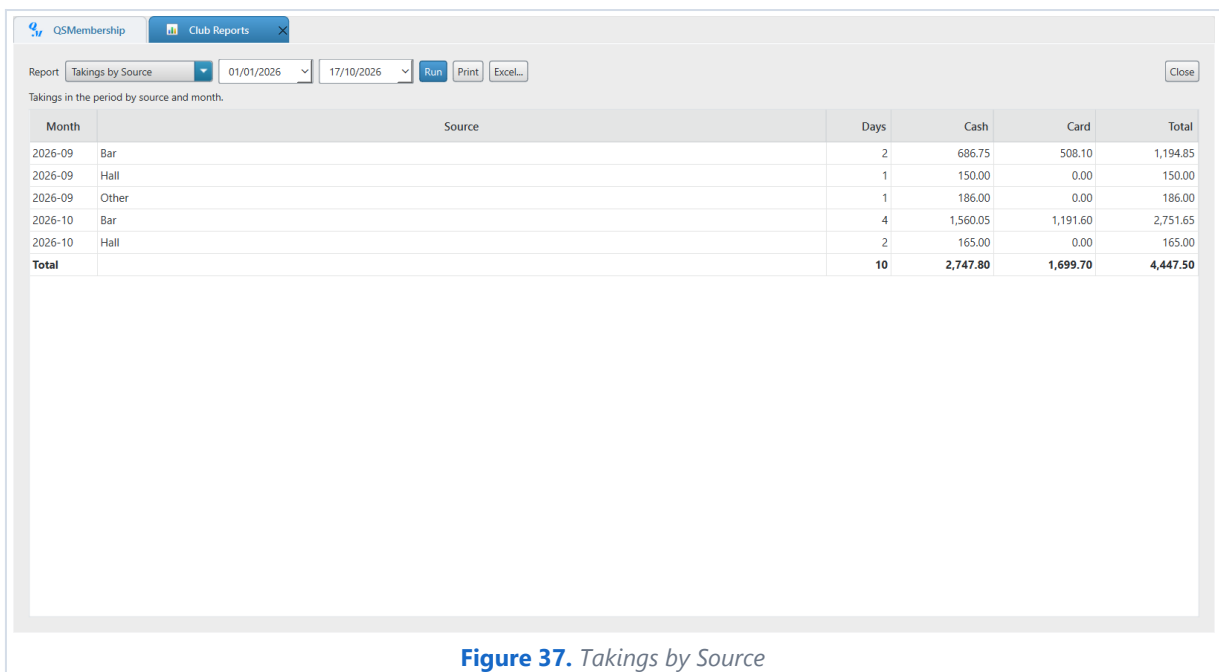
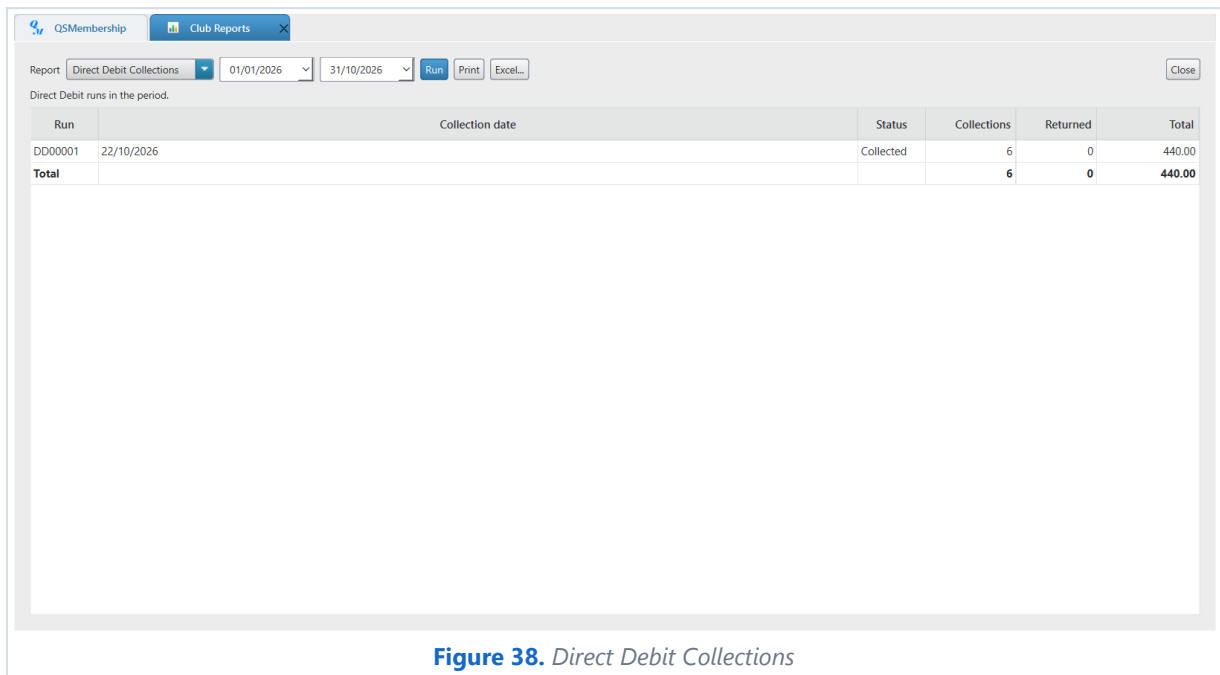
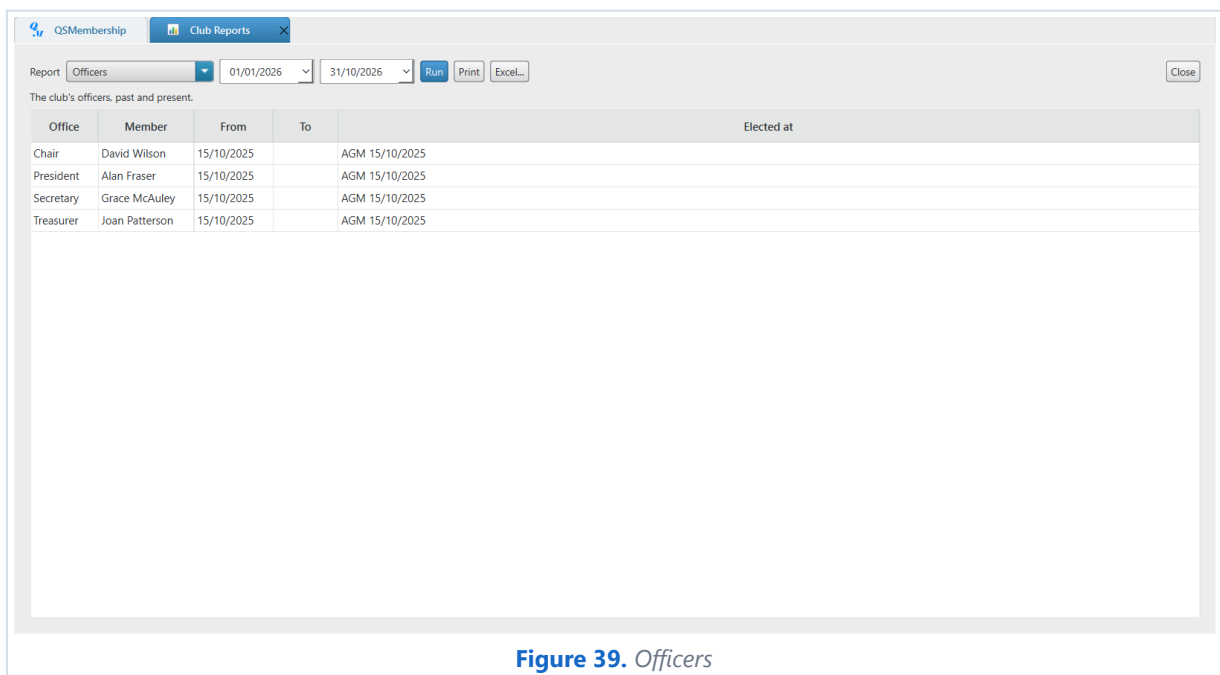


Figure 37. Takings by Source

Takings by Source: the bar, hall and other takings by month, cash and card.



Direct Debit Collections: every collection run, its date, status and total, with any returned collections.



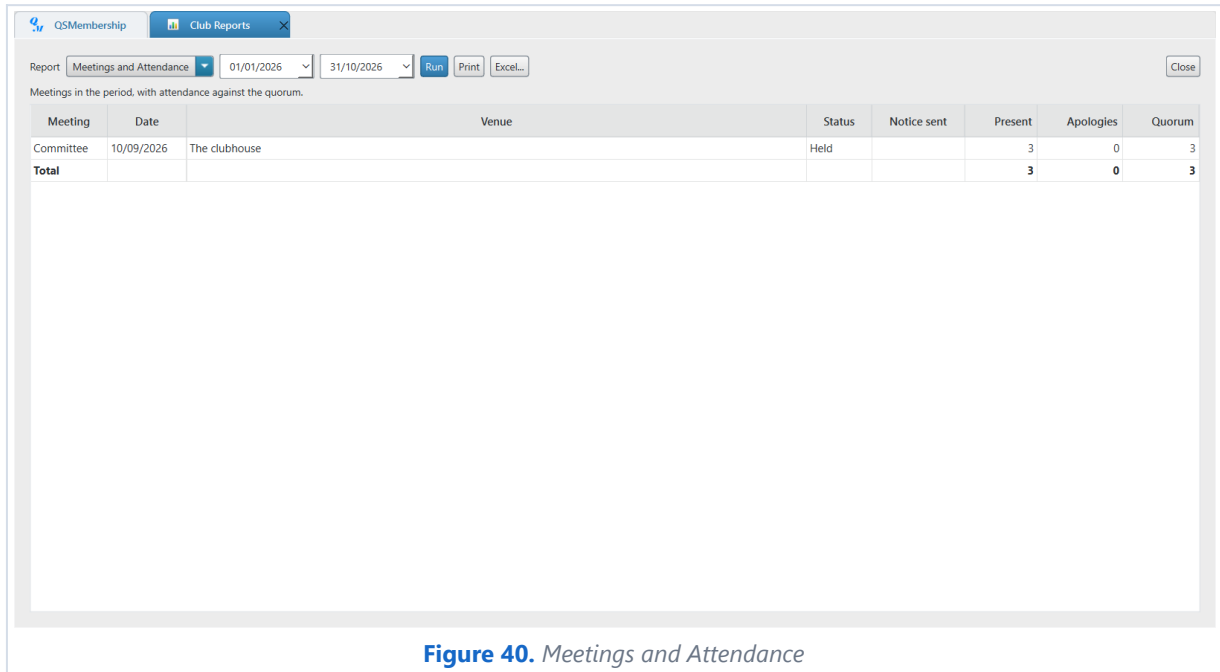


Figure 40. Meetings and Attendance

Officers lists the committee past and present; **Meetings and Attendance** lists the meetings with how many came against the quorum.

The dashboard afterwards

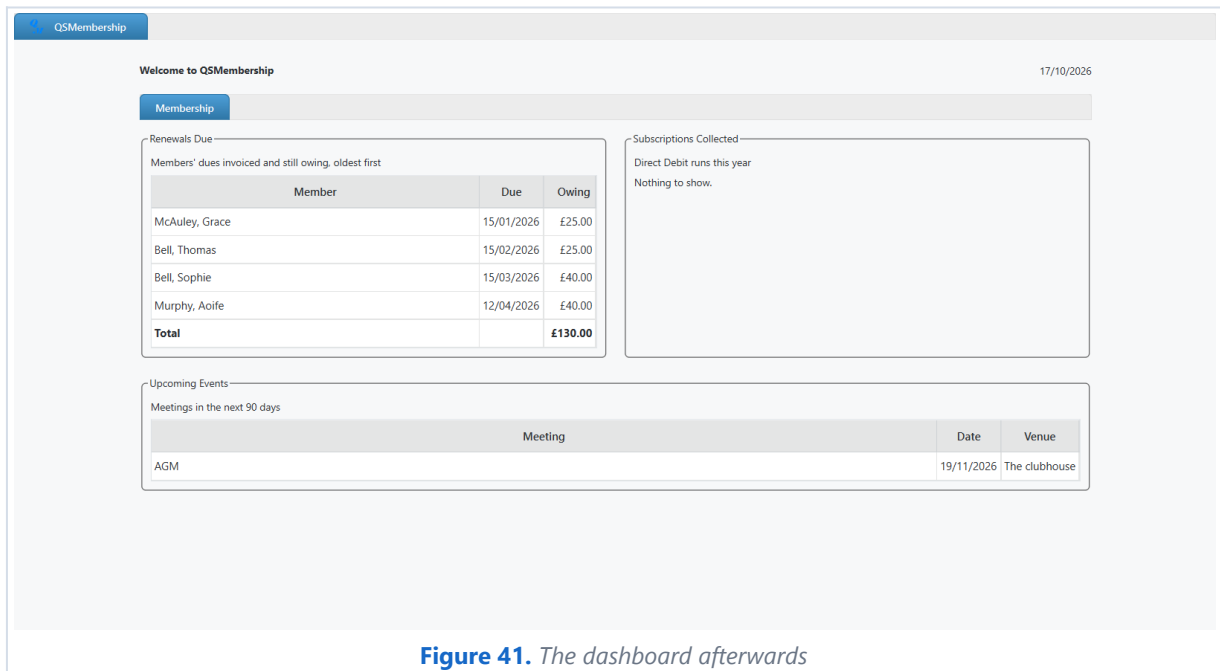


Figure 41. The dashboard afterwards

Renewals Due now lists the subscriptions invoiced and still owing; the members who pay by cash or standing order. The Direct Debit members have gone from it: their run has collected. **Subscriptions Collected** counts runs collected up to today; this run's money comes out of members' accounts on 22/10/2026, so it appears there from that day.

Quick reference

The treasurer's month

1. When the notice bar says dues are due, press **Generate...** and **Generate Invoices** in Contract Billing.
2. In **Membership > Direct Debit Collections**, press **Show Due**, then **Make Run**, then **Save Bacs File...** and send it to the bank.
3. When the money arrives, press **Post Receipts...**; mark any the bank returned first.
4. Record and **Bank** the bar and hall takings each week.
5. Run **Dues Owing** and chase what is still unpaid.

Try it yourself on the test drive

1. Add yourself as a new full playing member, then open **Membership > Members**: what do you owe?
2. Give yourself a Direct Debit mandate (sort code 980200, any eight-digit account number) and make a collection run.
3. Record Friday night's bar takings and bank them.
4. Open the AGM, add all the members, tick a few as present and press **Quorum?**.