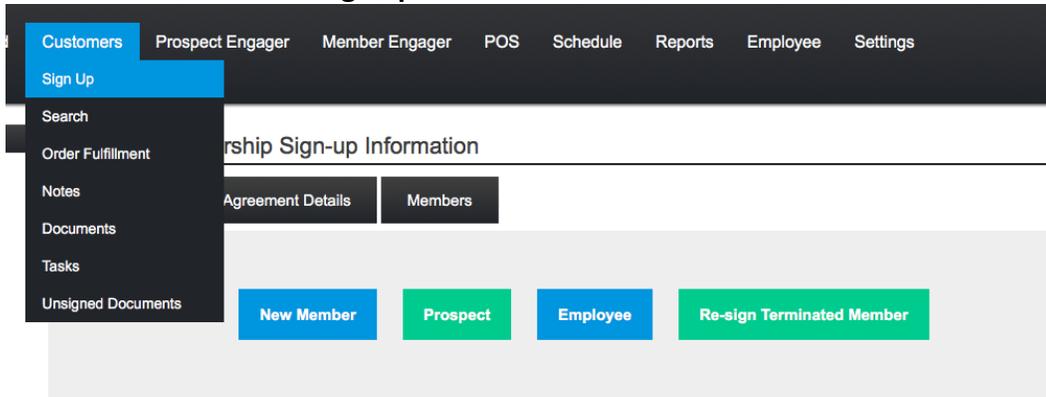


How to Sign Up a Member on Anniversary Billing

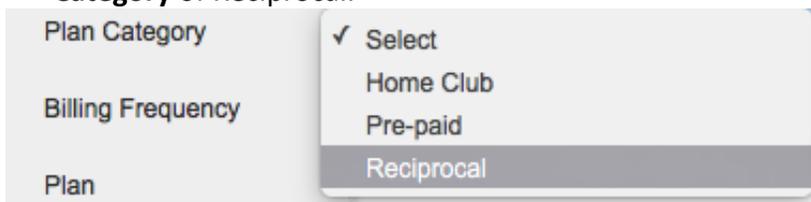
Signing up a member with anniversary billing in Fitware is the same steps you use for signing up a member for 1st of the month billing right now in Fitware.

1. Go to **Customers** → **Sign up** → **New Member** in Fitware

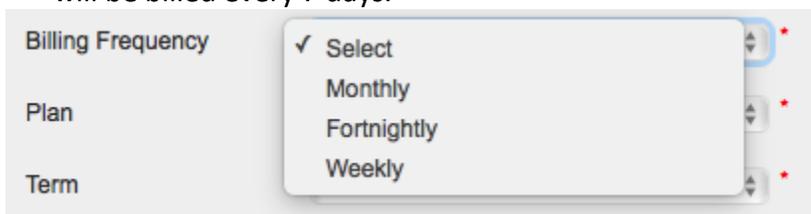


Membership Details

2. Anniversary billing only works on reciprocal memberships. Therefore, first you will select your **Plan Category** of Reciprocal.



3. You will next have the option of selecting the **Billing Frequency**, this is where you can either select monthly, fortnightly or weekly. When selecting monthly, your member will be billed once a month. When selecting fortnightly your member will be billed every 14 days, and when selecting weekly your member will be billed every 7 days.



4. Once you select your billing frequency you will need to select your **Plan**. For anniversary billing you will want to make sure you select the option of your choice that says it is for anniversary billing. If you do not select an option with anniversary billing, then the member will automatically be billed on the 1st of the month.

5. You will then select the **Term** of the membership. If you select Month to Month there will be no end date on the membership, but if you select a value between 1 – 48 months there will be an end date on the membership agreement.

6. Next, you will want to verify your **Start Date** and choose your **Date of Next Payment**. When selecting your date of next payment, you will be choosing what day of the month the member would like their automatic payment to come out of their bank account or credit card every month moving forward. For example, if you were to select February 13th as your next date of payment then the member’s automatic payment will come out on the 13th of every month.

7. Finally, you will select your **Program Fee, Membership Dues and Dues at Sign up**. **Program Fee:** This is set from a default value. It can be raised or lowered as desired (but only within set limits). **Membership Dues:** This is set from a default value. It represents the amount of the regular, recurring membership dues. It can be adjusted up or down as desired (but only within set limits). **Dues at Sign Up:** This is the amount (if any) collected from the member at time of sign-up. It represents the payment of their initial dues. The system automatically calculates this amount by prorating the dues by the number of days remaining in the billing period. This value can be raised, lowered, or zeroed out, as desired (but only within set limits).

Once you have entered all the information, click **Next** at the lower-right portion of the screen, and you will be taken to the *Member Information* page.

Member Information

Shown below is a typical example on how a *Member Information* screen would be filled out for a Single membership:

Step 3 - Member's Information ?

Member Type Agreement Details **Members**

Field(s) marked with * are required

Personal Details		Phone Numbers	
Barcode *	<input type="text"/>	Type	Phone
PIN	<input type="text"/>	Cell *	<input type="text"/> <input checked="" type="radio"/> Primary
Salutation	Select	Home	<input type="text"/> <input type="radio"/>
First Name *	<input type="text"/>	Work	<input type="text"/> <input type="radio"/>
MI	<input type="text"/>	Email *	<input type="text"/>
Last Name *	<input type="text"/>	Birthdate	Select Select Select *
Preferred Nickname	<input type="text"/>	Emergency Name	<input type="text"/>
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female	Emergency Number	<input type="text"/>
Street 1 *	<input type="text"/>	Image	<input type="text"/> Browse
Street 2	<input type="text"/>	[Note: Upload .jpg, .gif, .jpeg, .png files only]	
Street 3	<input type="text"/>	Payment Method	Select *
Country	Australia		
State	UNKNOWN		
City	<input type="text"/>		
Zip/Postal	<input type="text"/>		
Optional Field	<input type="text"/>		

Plan Details		Edit Plan
Plan Type	Reciprocal	
plan	Single-Reciprocal-Fortnightly	
Program Fees	50.00	
Dues (\$)	30.00	
Dues at Sign up	30.00	
Start Date	17/02/2016	
End Date	Auto Renew	
Next Billing Date	2/03/2016	
Payment Frequency	Fortnightly	

Member Information	
Sign up Fees (\$):	50.00
Dues (\$):	30.00
Add Another Member	
Check Out	

- Required fields are clearly marked with a red asterisk (*).
- It is highly recommend that as much of the optional information as possible be entered also.
- *Payment Method* is required, and is a particularly important field. Use the drop-down selector to enter a bank account, credit card details, or some other payment method. *You cannot save this membership until you have added a payment method.*

After you have entered all information, follow the instructions below to complete the process.

5. Save and Check Out

1. Click **Save** at the very bottom-right part of the screen.
2. You will receive a confirmation message. Click **OK**.
3. Click **Check Out** at the far-right side of the screen.

Shopping Cart

After entering a new membership, the Shopping Cart will appear similar to the following:

POS/Add Invoice



Please click on Add Product/Service button to select Product or Service.

John Smith

Inventory Item

PT Service

Additional Service

Item Name	Category	Type	QTY	Price(\$)	Tax (%)	Total(\$)	Edit	Delete
Single - Reciprocal	Reciprocal	Membership Plan	1	19.29	Sales Tax(6.8750%)	20.62		
Membership Plan Sign up	Reciprocal	Membership Plan Sign up	1	29.00	Sales Tax(6.8750%)	30.99		
						Subtotal(\$)	48.29	
						Tax Total(\$)	3.32	<input type="checkbox"/> No Tax
						Grand Total(\$)	51.61	

Check Out

- The sign-up fee and initial dues (if any) are displayed in the Shopping Cart.
- Click **Check Out** at the lower-right corner.

Check Out

1. The Check Out screen will look like this:

Check Out



Sales Person Ariel Lindahl

John Smith

Dues Amount (\$)

51.61

Add Payment Method

Payment Method	Amount Paid(\$)	Payment Status	Delete
Total(\$)		0.00	

Back

Process

2. Click **Add Payment Method** in the upper-right corner. You will see the following screen:

Add Payment Method

Payment Method	
Account On File	Select Payment Method(s) to the left and then enter amount paid below.
Credit Card	
Bank Account	
Cash	
Check	
On-Acct (Unpaid)	
Credit Memo (Owner Comp)	
Gift Certificate	
Discount	
Credit Card Terminal	
Close	

3. Select the payment method at the left, and enter the amount paid. In the example below, we have chosen cash:

Add Payment Method

Payment Method

Fields marked with * are required.

Cash Payment

Amount (\$) *

Save and Close Save and Add Another Cancel

Close

3. Click **Save and Close**.
4. Click **Process**.

Payment Receipt

1. You will receive the Payment Receipt, which looks like this:

Payment Receipt

Invoice Number : INV59528063

Date : Tuesday, February 16, 2016 11:18:38 AM

Receipt Number : 51900238

John Smith [61291602773]

Chanhassen [957]

2411 Galpin Court,

Chanhassen,

Minnesota,

55317,

United States

Contact Email : chanhassen@snapfitness.com

Contact Phone : 952-567-5800

No.	Items	Quantity	Amount(\$)	Discount(\$)	Total Amount(\$)
1	Single - Reciprocal	1	19.29	0.00	19.29
2	Single - Reciprocal Membership Plan Sign up	1	29.00	0.00	29.00

Tax Category	Tax Rate	Amount(\$)
1 Sales Tax	6.8750	3.32

Payment Method	Amount(\$)	Amount(\$)
Cash	51.61	
		Tax 3.32
		Total Paid 51.61
		Remaining Payment 0.00

Sales Person : Ariel Lindahl

Finish

3. Click the print icon in the menu bar at the top if you wish to print the receipt.
4. Click **Finish** in the lower-right corner when done.