

F107: Overview of Member Records

(Covers navigating through member records, sorting and searching for specific members' records, and the layout and organization of member records.)

1. Working with the Member List
2. A Tour Around a Member's Record
3. The Member Relate Bar

Working with the Member List

1. Click **Customers -> Search**
2. You will see a list similar to the following example:

Member List ?

Name Bar Code Status Customer Type

Rows 1-0 of 0 (Page 1 of 0) Records/Page


Please Enter Search Criteria

3. You can search by *Name*, *Bar Code*, *Status* or *Customer Type* using the controls along the top.
4. You can sort the information in the grid by any column, just by clicking on that column heading.
5. To jump to a member's record, just click on their name.

A Tour Around a Member's Record

Each member's record is divided into five tabs:

General Tab:

General	Contact Info	History	Billing	PT Scheduling
 John Smith Nickname : - Phone: 281-330-8004 Birthday: 4/15/2000 Group : - Insurance Company : -	Bar Code : 61291602773 Source : - Gender : Male Member since: 2/16/2016 Last Visited : - Contract End Date: Auto Renew	Agreement ID : 21507513 Membership Plan : Single - Reciprocal Membership Category : Reciprocal Number of Members : 1 Is Primary : Yes Billing Type : Recurring Current Status : OK		


Agreement Details

NOTE : Terminated/Transferred membership agreements can not be edited.


 = Void Agreement(s)

Agreement Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Single - Reciprocal	Reciprocal	Recurring	2/16/2016	-			


Contact Info:

General	Contact Info	History	Billing	PT Scheduling
	John Smith Nickname : - Phone: 281-330-8004 Birthday: 4/15/2000 Group : - Insurance Company : -	Bar Code : 61291602773 Source: - Gender : Male Member since: 2/16/2016 Last Visited : - Contract End Date: Auto Renew	Agreement ID : 21507513 Membership Plan : Single - Reciprocal Membership Category : Reciprocal Number of Members : 1 Is Primary : Yes Billing Type : Recurring Current Status : OK	
Address Details				
Street 1	123 Main Street	Zip/Postal Code	55317	
Street 2	-	Optional Field	-	
Street 3	-	Email	© johnsmith@yahoo.com	
Country/Region	United States	Emergency Name	-	
State/Province	Minnesota	Emergency Number	-	
City/Town	Chanhassen			
Phone Details				
Cell	© 281-330-8004	Home	-	
Work	-			


History:

General	Contact Info	History	Billing	PT Scheduling
	John Smith Nickname : - Phone: 281-330-8004 Birthday: 4/15/2000 Group : - Insurance Company : -	Bar Code : 61291602773 Source: - Gender : Male Member since: 2/16/2016 Last Visited : - Contract End Date: Auto Renew	Agreement ID : 21507513 Membership Plan : Single - Reciprocal Membership Category : Reciprocal Number of Members : 1 Is Primary : Yes Billing Type : Recurring Current Status : OK	
History				
				Choose type of history <input type="text" value="Select"/>

Billing:

General	Contact Info	History	Billing	PT Scheduling			
 John Smith Nickname :- Phone: 281-330-8004 Birthday: 4/15/2000 Group :- Insurance Company :-		Bar Code : 61291602773 Source: - Gender: Male Member since: 2/16/2016 Last Visited :- Contract End Date: Auto Renew		Agreement ID : 21507513 Membership Plan : Single - Reciprocal Membership Category : Reciprocal Number of Members : 1 Is Primary : Yes Billing Type : Recurring Current Status : OK			
Current Due: \$0.00 Future Due: \$0.00 Unapplied Amount : \$0.00 Total: \$0.00		Next Dues Post Date: 3/1/2016 Last Billing Date: - Membership Price : \$42.70 Wellness Account Balance : \$0.00					
Payment History	Invoice History	Current Due	Future Due	Customer Account	Payment Methods	Statement	
■ = Void Payment						Account Adjustment	
Rows 1-1 of 1 (Page 1 of 1) <input type="text"/> Go to page ◀ 1 ▶▶ <input type="text" value="20"/> Records/Page							
Paid Date	Receipt Number	Invoice	Payment Method	Amount Paid (\$)	Unapplied Amount (\$)	Status	Actions
2/16/2016	51900238	INV59528063	Cash	51.61	0.00	Approved	












PT Scheduling:

General	Contact Info	History	Billing	PT Scheduling					
 John Smith Nickname :- Phone: 281-330-8004 Birthday: 4/15/2000 Group :- Insurance Company :-		Bar Code : 61291602773 Source: - Gender: Male Member since: 2/16/2016 Last Visited :- Contract End Date: Auto Renew		Agreement ID : 21507513 Membership Plan : Single - Reciprocal Membership Category : Reciprocal Number of Members : 1 Is Primary : Yes Billing Type : Recurring Current Status : OK					
Member PT Scheduling									
Agreement Number <input type="text"/>		Status <input type="text" value="Select"/> Search View All							
■ = Void Session(s)									
Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
No Record(s) found									
<input type="text" value="SELECT"/>		Update							

The Member Relate Bar

Shown below is a listing of what each icon in the Member Relate Bar does.

(When actually using Fitware, please remember that hovering your mouse pointer over any icon will produce a pop-up showing what that icon does.)

	Edit
	POS
	Credit/Refund
	Document
	Note
	Task
	Schedule
	Status Change
	Freeze
	Terminate Member
	Convert Membership