F109: Cancelling a Member

(Covers member cancellation, financial cancellation options, reasons, notes and dates, and verifying a future-set cancellation.)

1. Starting the Cancellation Process
2. Financial Cancellation Options
3. Reason, Notes, and Date
4. Verifying a Future Cancellation Date

Starting the Cancellation Process

1. Click **Customers** > **Search**, then enter the member's name. This takes you to their member record.
2. Click the **Terminate Member** button in the Relate Bar:

Financial Cancellation Options

You will be asked if the member is canceling one of three ways:

1. **Cancel without exchanging money**: This is the most common option, and is selected by default; just click **Continue**.
2. **Member is buying out for cancel**: This means the member owes you money. The system will help you with a buy-out calculator, and automatically take you to the Point of Sale system to record the payment.
3. **Issue a refund and cancel**: This option is used when the member is due a refund as part of their cancellation. The system will help you with a refund calculator, and automatically take you to the Refund section to process the amount due to the customer.

<u>Reason, Notes, and Date</u>

You will next be asked for a reason, notes, and a date:

1. **Reason**: Select from the drop-down list of choices. It will help you track the reasons members cancel.
2. **Note**: Optional, but highly helpful and useful.
3. **Effective Date**: May be set as today's date, or a date in the future.

Verifying a Future Cancellation Date

To verify a member's future-set cancellation date, follow these steps:

1. Click **Customer** > **Search**, then enter a member's name. This takes you to their member record.
2. Click on the link **OK** under *Current Status*, as shown below:

3. The Status History will verify that a future cancellation date has been set:

4. The Single membership has a status of *OK*, scheduled to end on 28-Feb-2016.
5. The Single membership also has a status of *Terminated*, set to begin on 29-Feb-2016. This line is highlighted in blue, indicating it is a Future Status Change.