

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:

Terminate Member

How would you like to terminate this membership?

Terminate without exchanging money

Member is buying out to terminate

Issue a refund and terminate

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.

Reason, Notes, and Date

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

Fields marked with * are required.

Terminate Member

Reason *

Note

Effective Date *

Note: Members' door access will be removed on this 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:

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	-			

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

Status History Choose type of history: Status History

Search Search View All

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■ = Future Status Change(s)

Membership	Status	Begin Date	End Date	Created Date	CreatedBy	Description	Reason	Cancel
Single - Reciprocal	Terminated	2/29/2016		2/16/2016	Andrea Hagen		Other	
Single - Reciprocal	OK	2/16/2016	2/28/2016	2/16/2016	Andrea Hagen			

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.