

F123: Selling Recurring Personal Training

- 1) Find the member that is purchasing recurring PT in the Fitware database. Once you select the member, select POS in the column of icons to the left of the member relate bar.

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 : [Freeze](#)

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
New Year's Special	Custom	Prepay	2/16/2016	3/15/2016			
Brent's Boot Camp - 8	Classes	Prepay	2/16/2016	3/15/2016			
Single - Reciprocal	Reciprocal	Recurring	2/16/2016	-			

Notes

Note	Posted by	Date Created	Date Last Updated
Had an asthma attack while working out today.	Andrea Hagen	2/16/2016 4:31:04 PM	2/16/2016 4:31:04 PM

- 2) Select PT Service when selling recurring PT to the selected member.

POS/Add Invoice ?

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

Inventory Item

PT Service

Additional Service

- 3) In Session Type, select Custom >Custom Recurring Agreement.

Fields marked with * are required.

Purchase PT Services

Session Type	Select *
Billing Frequency	Select
Billing Type	Classes > Andrea Test Class
Type	Classes > Boot Camp
Number of Sessions	Classes > Brent's Boot Camp - 8
Duration	Classes > EPT - Class
Price (\$)	Classes > Hard Core
Tax Category	Classes > Megan's Boot Camp
Sales Person	Classes > Shannon's Kickboxing
Expiration Day	Custom > Custom PT
Date of Next Payment	Custom > Custom Recurring Agreement
End Date	Custom > New Year's Special
Paid by	Custom > Total Transformation PT
	Pre-Programmed > Basic 8
	Pre-Programmed > Express Fitness
	Pre-Programmed > Fitscore
	Pre-Programmed > Introduction To Fitness
	Pre-Programmed > PT Unlimited
	Pre-Programmed > Total Body
	Select *

2/29/2016

Primary Me

Custom > Custom Recurring

- 4) Enter how many sessions the member will be purchasing each month, how long each session is, and the price per session. Enter the Sales Person. Please ensure that the Expiration Date is Month to Month. Also ensure that the Billing Frequency is set up as "Monthly". Please ensure that the Date of Next Payment is the first of the following month. Select Save.

Fields marked with * are required.

Purchase PT Services

Session Type	Custom > Custom Recurrin	*
Billing Frequency	Monthly	
Billing Type	Recurring	
Type	Session based	
Number of Sessions	5	*
Duration	30	* Minutes
Price (\$)	30.00	*
Tax Category	PT Tax	
Sales Person	Ariel Lindahl	*
Expiration Day	Month to Month	*
Date of Next Payment	3/1/2016	
End Date	Auto Renew	
Paid by	<input checked="" type="radio"/> Primary <input type="radio"/> Me	

- 5) Review the transaction ensuring that the quantity of training sessions equals the quantity per month. Ensure that the Total (\$) equals the EFT price given on the Personal Training Agreement. Select Check Out.

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
Custom Recurring Agreement	Custom	PT Service	5	30.00	PT Tax(0.0000%)	150.00		
						Subtotal(\$)	150.00	
						Tax Total(\$)	0.00	<input type="checkbox"/> No Tax
						Grand Total(\$)	150.00	

Check Out

- 6) Select the proper salesperson and payment method. Select Process.

Check Out ?

Sales Person *

John Smith

Dues Amount (\$)

0.00

Add Payment Method

Payment Method	Amount Paid(\$)	Payment Status	Delete
Cash	150.00	Success	
Total(\$)		150.00	

Back

Process


- 7) Please note: The membership price changes to reflect the amount of PT-EFT each month. In this exampl

	John Smith	Bar Code : 61291602773	Agreement ID : 21507513
	Nickname : -	Source : -	Membership Plan : Single - Reciprocal
	Phone: 281-330-8004	Gender : Male	Membership Category : Reciprocal
	Birthday: 4/15/2000	Member since: 2/16/2016	Number of Members : 1
	Group : -	Last Visited : -	Is Primary : Yes
	Insurance Company : -	Contract End Date: Auto Renew	Billing Type : Recurring
			Current Status : <u>Freeze</u>
Current Due:	\$200.00	Next Dues Post Date:	3/1/2016
Future Due:	\$800.00	Last Billing Date:	-
Unapplied Amount :	\$-50.00	Membership Price :	\$192.70
Total:	\$950.00	Wellness Account Balance :	\$0.00

[Payment History](#)
[Invoice History](#)
[Current Due](#)
[Future Due](#)
[Customer Account](#)
[Payment Methods](#)
[Statement](#)

e, \$150 per month was added to the Membership Price.

- 8) The PT Sessions that have been paid for will show up after each payment to ensure that the sessions can be scheduled and consumed.

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

Member PT Scheduling

Agreement Number Status

Rows 1-15 of 15 (Page 1 of 1)

■ = Void Session(s)

	Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
<input type="checkbox"/>	817386	3100231	5 of 5	Custom > Custom...	2/17/2016	30.00	Paid Unscheduled		Book	
<input type="checkbox"/>	817386	3100230	4 of 5	Custom > Custom...	2/17/2016	30.00	Paid Unscheduled		Book	
<input type="checkbox"/>	817386	3100229	3 of 5	Custom > Custom...	2/17/2016	30.00	Paid Unscheduled		Book	
<input type="checkbox"/>	817386	3100228	2 of 5	Custom > Custom...	2/17/2016	30.00	Paid Unscheduled		Book	
<input type="checkbox"/>	817386	3100227	1 of 5	Custom > Custom...	2/17/2016	30.00	Paid Unscheduled		Book	