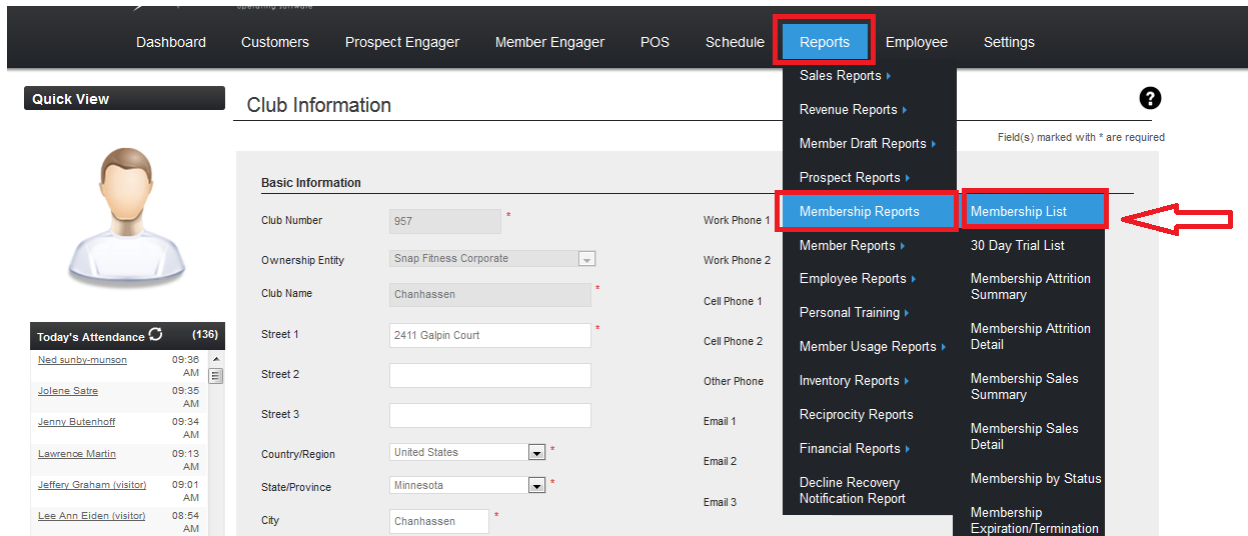


How to Prepare for Your Monthly Draft

Membership List Report



Location: Club Tier > Reports > Membership Reports > Membership List

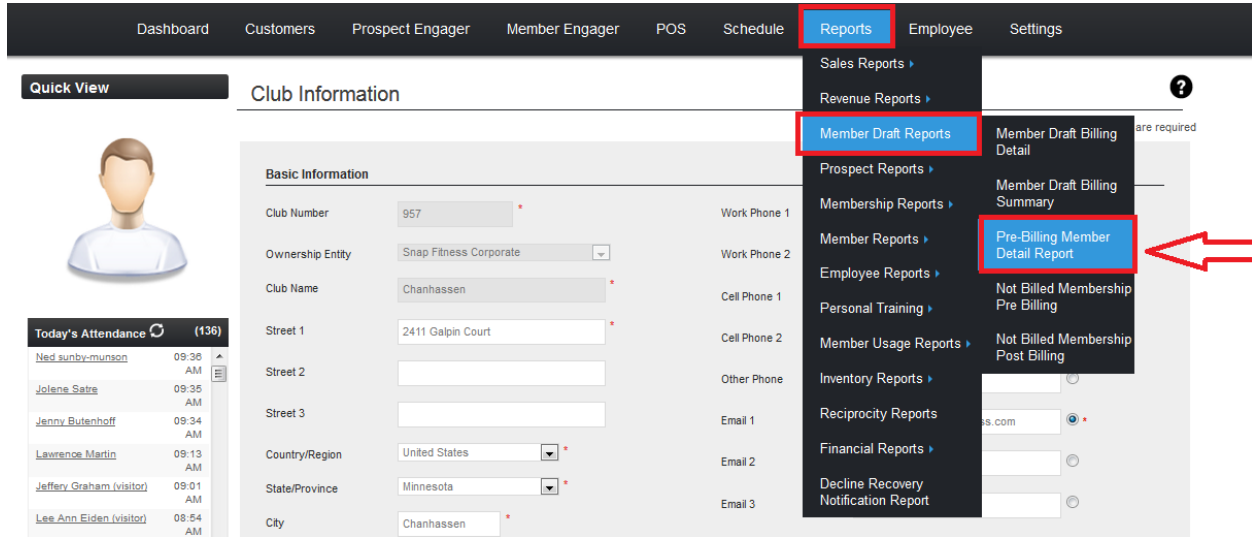
The "Membership List" report returns a list of all your memberships and provides the below details. This report allows you to order by the below fields as well so that you can identify all memberships with Future Next Payment Dates, Zero Dollar Membership Dues, Statement Members, and/or Terminating Memberships which can help you determine memberships that won't be included in the upcoming membership draft so that you can be pro-active and address any issues before the draft is pulled 3 days prior to the end of the month.

- Primary Member Name
- Primary Member Email
- Membership Plan
- Current Status
- Membership Start Date
- Membership End Date (if it's undefined it's a month-to-month membership with no end date)
- Membership Dues Amount
- Payment Method (i.e. Bank, Credit Card or Statement)
- Next Payment Date
- Account Balance (if it's a negative amount they have a credit/unapplied amount on account)

A user can currently filter by the following criteria:

- Membership Category (i.e. Home Club Only, Pre-paid, and/or Reciprocal)
- Membership Plan (i.e. Single, Joint, Family and/or Employee)
- Current Status
- Payment Method (i.e. Bank, Credit Card and/or Statement)

Pre-billing Member Detail Report

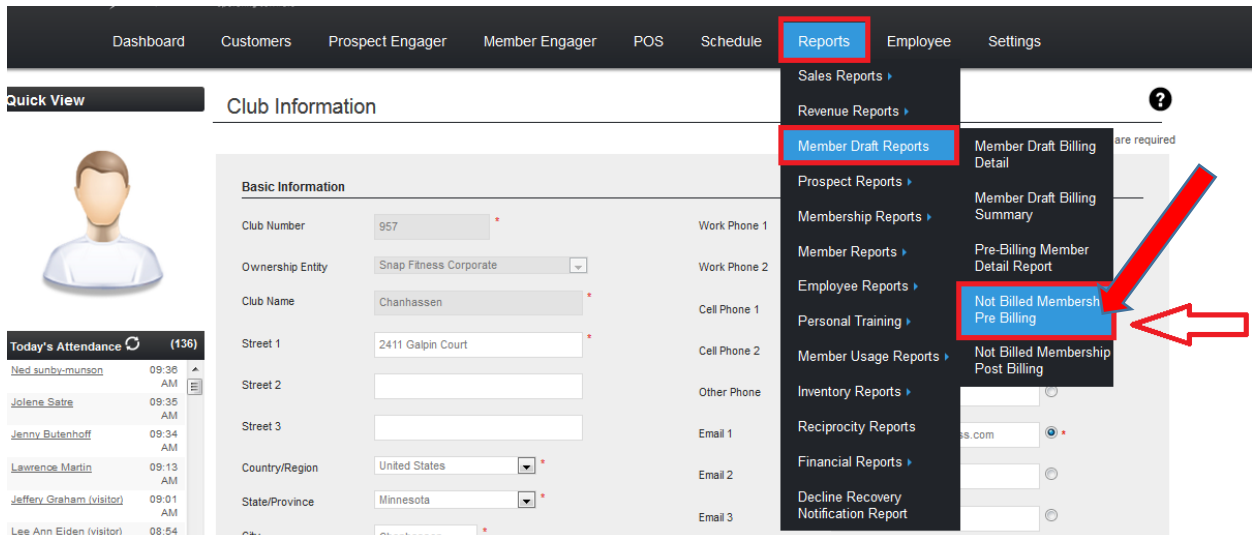


Location: Club Tier > Reports > Member Draft Reports > Pre-billing Member Detail Report

The "Pre-billing Member Detail" Report helps you project who will be included in the upcoming member draft. This report includes all members that would be included in the upcoming member draft at the time that the report is pulled. This is only a projection and does not include Wellness Credits and/or any other sales or payments that may be posted after the time of the report being pulled and the end of the month.

For example, if the Pre-billing Member Detail Report was ran on the 20th of the month it would include all memberships that would have an active agreement and a Next Payment Date set to the 1st of the upcoming month at the time of the report being pulled (any membership changes made on the same day of the report being pulled would not be reflected on this report).

Not Billed Membership Pre Billing



Location: Club Tier > Reports > Member Draft Reports > Not Billed Membership Pre Billing

The "Not Billed Membership Pre Billing" report returns a list of all projected "Not Billed" memberships for the upcoming member draft along with a reason. This report will categorize your projected "Not Billed" memberships into 2 reason type buckets; 1) Problem Reasons 2) Non-Problem reasons.

Below is a list of reasons for each Reason Type category:

- **Problem Reasons**

- **Expired Credit Card** - we will attempt to bill members with expired credit cards but it's good practice to be pro-active about updating these to ensure their payment don't get returned.
- **Suspended Status Members** - Members that have been put into a suspended status due to declining for 2 consecutive months without bring their accounts current will not be included in the draft to save you processing fees.
- **Next Dues Post Date in the past** - Members with a Next Payment Date stuck in the past
- **Zero Dollar Membership Dues** - Memberships that have zero dollar membership dues
- **Miscellaneous Unknown Reason** - This is basically a catch all reason and would include any not billed members that where not assigned to any other problem / Non-problem reason.

- **Non-problem Reasons**

- Statement Members
- Pre-paid Memberships
- Expiring Contract Membership
- Terminating Memberships
- Future Next Dues Post Date
- Freeze Members
- Agreement start date after billing file generated
- Not responsible for payment

Credit Card Expiring Report

The screenshot shows the 'Club Information' page in the Fitware system. The 'Reports' menu is open, and 'Credit Card Expiring' is highlighted with a red box and a red arrow. The page includes a navigation bar with 'Dashboard', 'Customers', 'Prospect Engager', 'Member Engager', 'POS', 'Schedule', 'Reports', 'Employee', and 'Settings'. The 'Club Information' section is divided into 'Basic Information' and 'Freeze Fees'. The 'Basic Information' section includes fields for Club Number (957), Ownership Entity (Snap Fitness Corporate), Club Name (Chanhasen), Street 1 (2411 Galpin Court), Country/Region (United States), State/Province (Minnesota), City (Chanhasen), and Zip/Postal Code (55317). The 'Freeze Fees' section includes Freeze Fees (3.00) and NSF Fees (20.00). The 'Reports' menu is open, showing various report categories such as Sales Reports, Revenue Reports, Member Draft Reports, Prospect Reports, Membership Reports, Member Reports, Employee Reports, Personal Training, Member Usage Reports, Inventory Reports, Reciprocity Reports, Financial Reports (highlighted), Decline Recovery Notification Report, Accounts Receivable, Tax Report, Payment Method Lookup, Payment Method Status, Declines by Date Range, POS Transaction Report, and Credit Card Expiring (highlighted with a red box and a red arrow).

Location: Club Tier > Reports > Financial Reports > Credit Card Expiring Report

Fitware will attempt to bill expired Credit Cards, however it is best practice to be pro-active about keeping credit cards on file current to ensure that the attempt is successful. The "Credit Card Expiring" Report allows you to report on credit cards that are expiring for the selected date range so that you can contact the customer and update their payment details before the draft.