

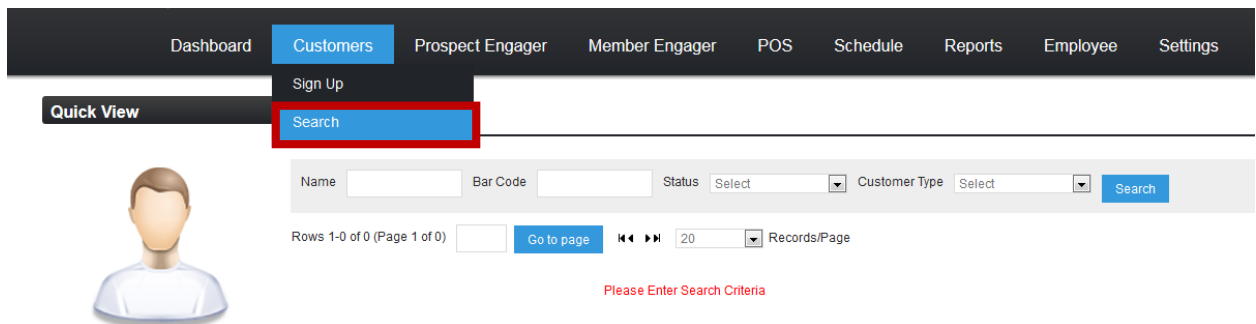
F124: Changing a Salesperson

Purpose: These procedures explain how to change the salesperson associated with a sale, a new-membership sign-up, or a Fitpro that serviced a session.

Sales

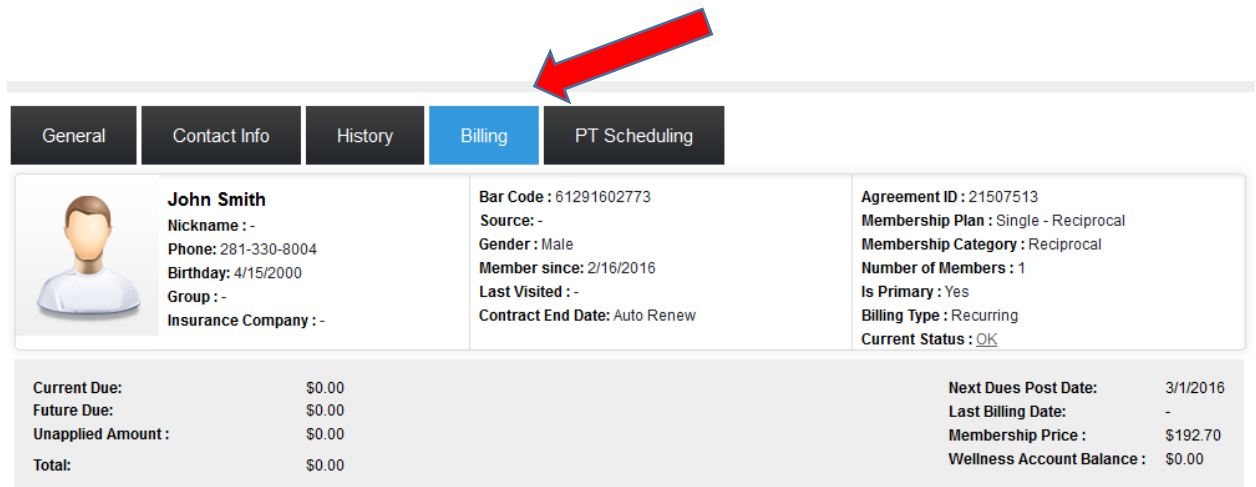
If a salesperson needs to be changed for a sale of an inventory item, additional services, or a membership sale, follow these steps:

1. Go to the member's record.




The screenshot shows the top navigation bar with the following items: Dashboard, Customers (highlighted), Prospect Engager, Member Engager, POS, Schedule, Reports, Employee, and Settings. Below the navigation bar is a 'Quick View' section with a 'Search' button highlighted in a red box. To the right of the search bar are input fields for Name, Bar Code, Status (dropdown), and Customer Type (dropdown), followed by a Search button. Below these fields is a pagination control showing 'Rows 1-0 of 0 (Page 1 of 0)' and a 'Go to page' button. A red arrow points to the 'Search' button in the Quick View section.

2. Click on the **Billing** tab.

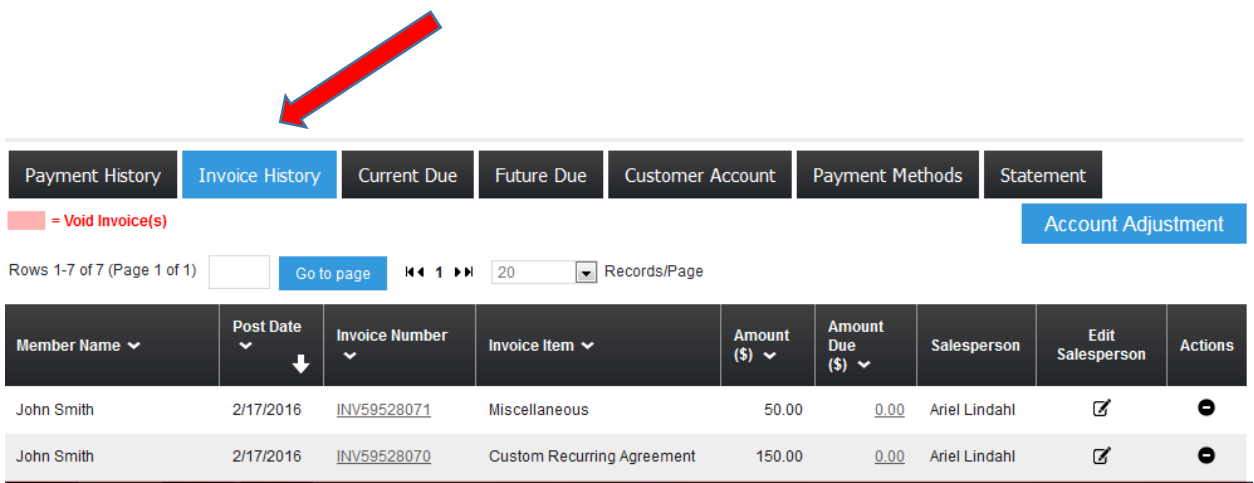


The screenshot shows the member record page for John Smith. The navigation tabs are General, Contact Info, History, Billing (highlighted with a red arrow), and PT Scheduling. The member information is displayed in a table format:

	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 : <u>OK</u>
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Current Due:	\$0.00	Next Dues Post Date:	3/1/2016
Future Due:	\$0.00	Last Billing Date:	-
Unapplied Amount :	\$0.00	Membership Price :	\$192.70
Total:	\$0.00	Wellness Account Balance :	\$0.00

3. Click on the **Invoice History** tab.



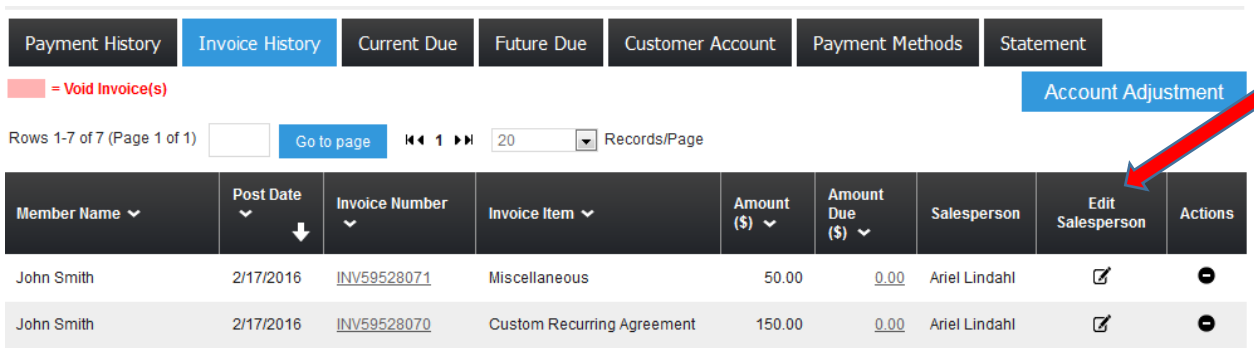
Payment History **Invoice History** Current Due Future Due Customer Account Payment Methods Statement

■ = Void Invoice(s) Account Adjustment

Rows 1-7 of 7 (Page 1 of 1) Go to page ◀ 1 ▶ Records/Page

Member Name	Post Date	Invoice Number	Invoice Item	Amount (\$)	Amount Due (\$)	Salesperson	Edit Salesperson	Actions
John Smith	2/17/2016	INV59528071	Miscellaneous	50.00	0.00	Ariel Lindahl		
John Smith	2/17/2016	INV59528070	Custom Recurring Agreement	150.00	0.00	Ariel Lindahl		

- Click on the icon in the **Edit Salesperson** column next to the item that needs to be changed.



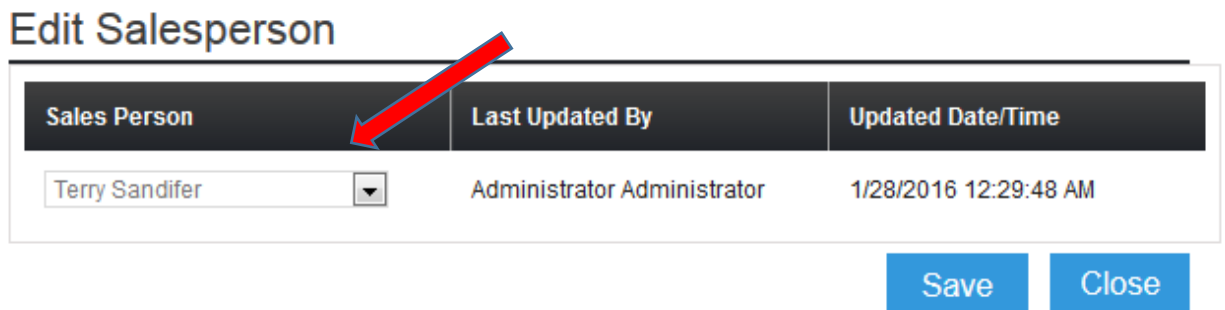
Payment History **Invoice History** Current Due Future Due Customer Account Payment Methods Statement

■ = Void Invoice(s) Account Adjustment

Rows 1-7 of 7 (Page 1 of 1) Go to page ◀ 1 ▶ Records/Page

Member Name	Post Date	Invoice Number	Invoice Item	Amount (\$)	Amount Due (\$)	Salesperson	Edit Salesperson	Actions
John Smith	2/17/2016	INV59528071	Miscellaneous	50.00	0.00	Ariel Lindahl		
John Smith	2/17/2016	INV59528070	Custom Recurring Agreement	150.00	0.00	Ariel Lindahl		

- You will receive an **Edit Salesperson** dialog box:

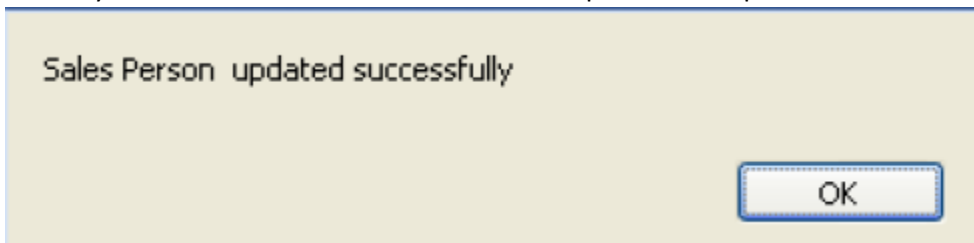


Edit Salesperson

Sales Person	Last Updated By	Updated Date/Time
<input type="text" value="Terry Sandifer"/>	Administrator Administrator	1/28/2016 12:29:48 AM

Change the Salesperson as needed by using the drop-down selector at the left, then click **Save**.

- Ensure you receive a confirmation that the sales person was updated:



Sales Person updated successfully

Fit Pros

To change the Fitpro who serviced a session, follow these steps:

1. Go to the member's record.

Dashboard Customers Prospect Engager Member Engager POS Schedule Reports Employee Settings

Sign Up

Quick View Search

Name Bar Code Status Customer Type Search

Rows 1-0 of 0 (Page 1 of 0) Go to page 20 Records/Page

Please Enter Search Criteria

2. Click on the **PT Scheduling** 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

Member PT Scheduling

3. Click **Edit** in the **Action** column next to the session that needs to be changed.

= Void Session(s)

Agreement Number	SessionID	Session Number	Session Type	Purchase Date	Price(\$)	Status	Schedule Date	Action	Approved?
817382	3100208	8 of 8	Classes > Brent...	2/16/2016	80.00	Paid Completed	2/16/2016	Edit	
817382	3100207	7 of 8	Classes > Brent...	2/16/2016	80.00	Paid Approved	2/18/2016	Edit	Consumed

4. You will receive a **Schedule Appointment** dialog box:

Schedule Appointment

Session Type: Classes > Brent's Boot Camp - 8
Duration: 30 Minutes
When: 2/16/2016 12:00 AM - 2/16/2016 12:30:00 AM
Who: John Smith [281-330-8004]
Session Number: 8 of 8
Fit Pro: Ariel Lindahl
Created On: 2/16/2016 6:29:34 PM by Andrea Hagen
Updated On: 2/16/2016 6:36:35 PM by Andrea Hagen

Send Confirmation to Member Send Confirmation to Fit Pro

Save Close

Change the FitPro as needed by using the drop-down selector at the right, then click **Save**.

5. Ensure you receive the following confirmation:

