

## F104: Entering a Joint or Family Membership

(This second, more-detailed pass through new membership entry covers entering Joint and Family memberships.)

1. Overview
2. Entering the Primary Member
3. Entering Additional Members
4. Closing Out the Process

### Overview

1. This course assumes you have already seen **F102 - Entering a Single Membership**.
2. This is only the second pass through new membership entry. There will still be a lot of field that aren't covered; don't worry, they will be covered in upcoming trainings.

### Entering the Primary Member

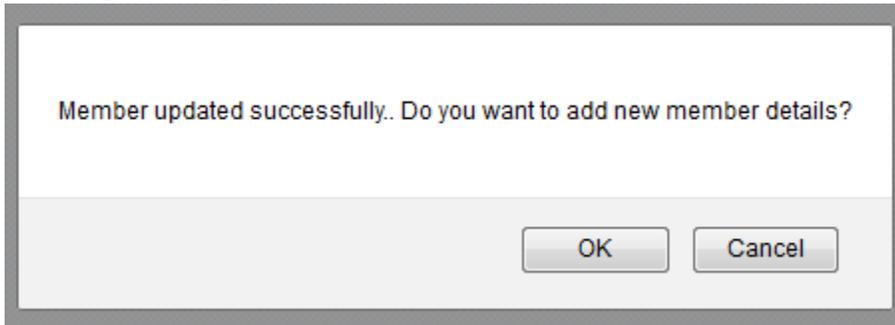
1. Enter the first member (the primary member), as instructed in course **F102 - Entering a Single Membership**.
2. When selecting the Plan, however, make sure you choose *Joint* or *Family*.

#### Step 2 - Membership Agreement Details

Member Type	Agreement Details	Members
<b>Plan Details</b>		
Plan Category	Reciprocal	*
Billing Frequency	Monthly	*
Plan	Joint - Reciprocal	*
Term	Month to Month	*
Start Date	2/16/2016	
End Date	Auto Renew	
Date of Next Payment	1 March - 2016	*
Program Fee (\$)	49.00	*
Membership Dues (\$)	59.95	*
Dues at Sign up (\$)	28.94	*

## Entering Additional Members

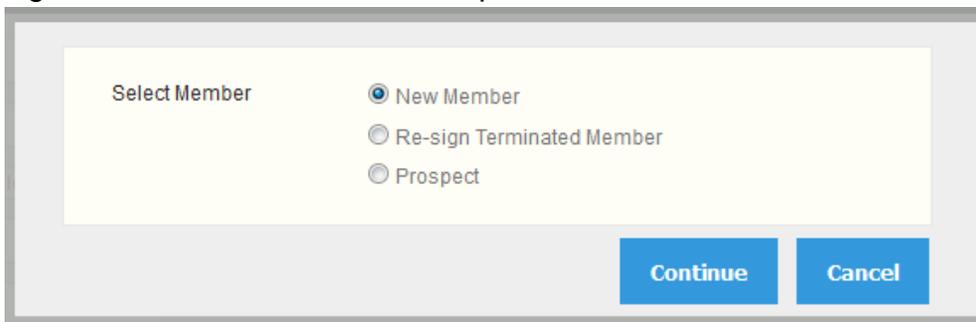
1. After you have entered the primary member and clicked **Save**, you will receive a message asking if you wish to enter the next member. Click **OK**.



Member updated successfully.. Do you want to add new member details?

OK Cancel

2. You will then receive a message asking if you wish to enter a New Member, Re-sign Terminated Member, or Prospect. Select *New Member* and click **Continue**.



Select Member

New Member

Re-sign Terminated Member

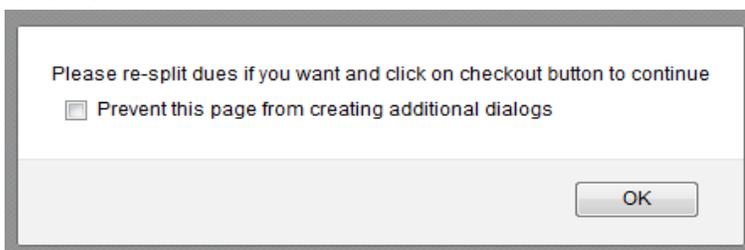
Prospect

Continue Cancel

3. Enter the information for the next member, then click **Save**.
4. Continue this process until you have finished entering all members (remember, a Joint membership has two members; a family membership has three or more).

## Closing Out the Process

1. After you have entered the last member and clicked **Save**, you will be asked if you wish to enter another member. Click **Cancel**.
2. If this is a Family membership will receive a message about re-splitting dues. Click **OK**.



Please re-split dues if you want and click on checkout button to continue

Prevent this page from creating additional dialogs

OK

3. Under member Information select the **Primary** and split the dues accordingly.

Member Information			
Primary	Name	Dues (\$)	Edit
<input checked="" type="radio"/>	Michael Smith	<input type="text" value="64.95"/>	
<input type="radio"/>	Elizabeth Smith	<input type="text" value="0.00"/>	

Sign up Fees (\$): 28.95  
Dues (\$): 64.95

[Add Another Member](#)

[Check Out](#)

4. Click the **Check Out** button at the far-right corner of the screen. You will be taken to the Point of Sale screen to complete the payment process as usual.