F115: Converting a Membership

Covers how to upgrade a single membership to a joint membership or joint membership to a family, re-signing a terminated member, and downgrading memberships.

Upgrade a single membership to a joint or joint to a family

Select "Convert Membership" under the member relate bar.

Enter the Membership Agreement Details and Select Joint or Family under the "Plan" drop down menu.
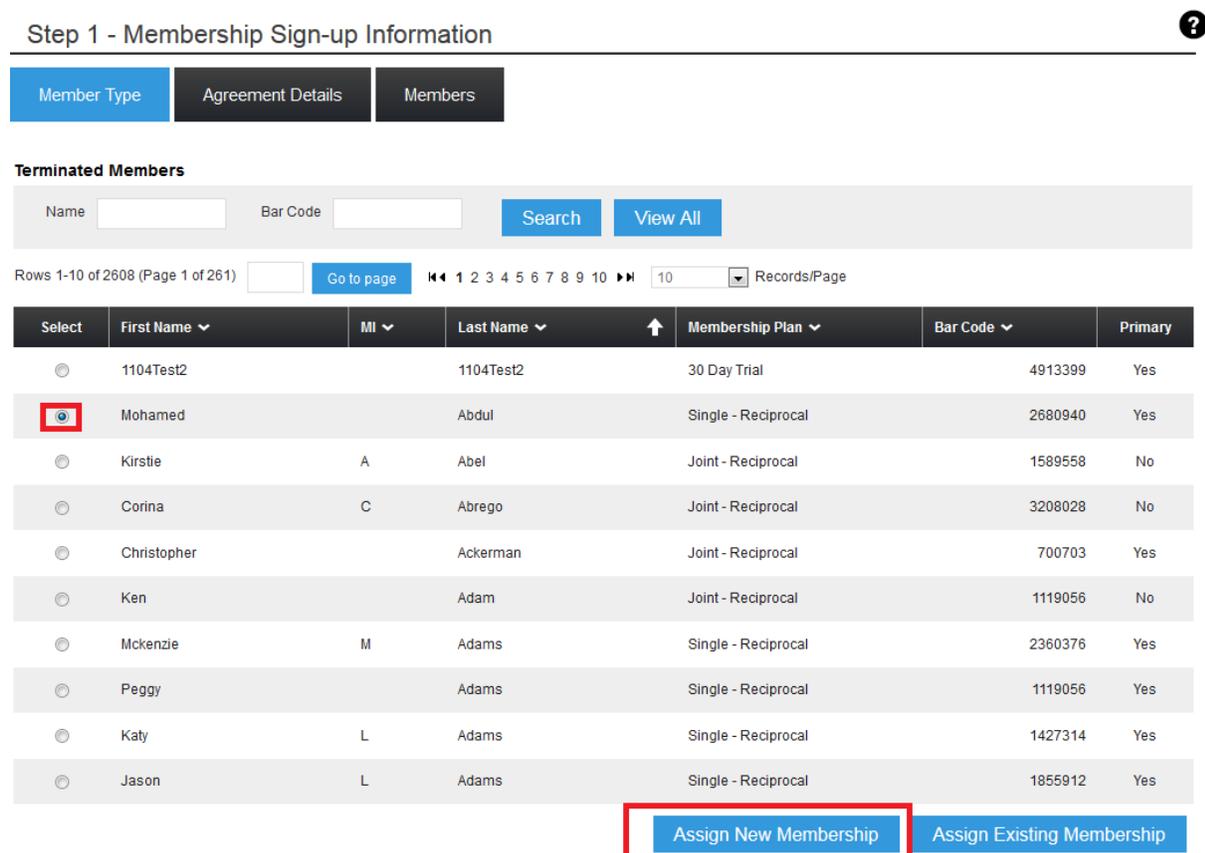
Follow the steps to add additional members and process payment information. Follow the same steps to convert a Joint membership to a Family membership.

Re-Signing a Terminated Member

Begin this process by going to the Customers tab → Sign up → Re-Sign Terminated Member
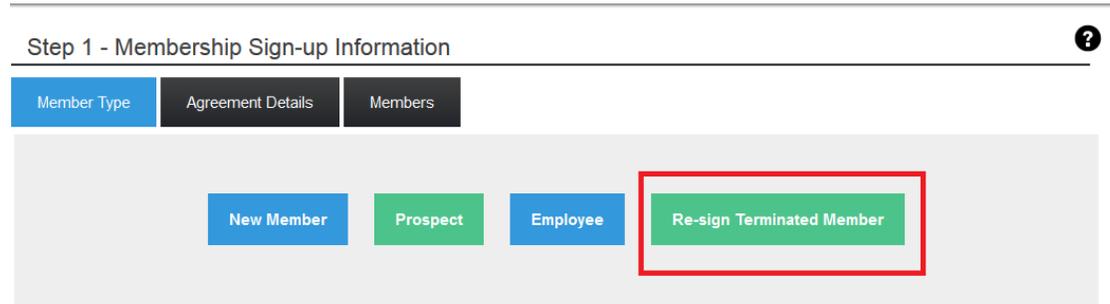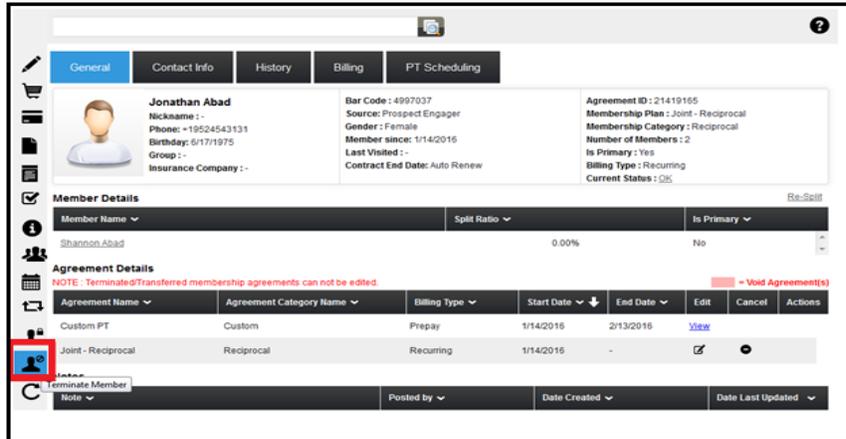

Select a terminated member and "Assign New Membership".

Then follow the steps to create a new membership contract as demonstrated previously.

Downgrading Memberships

To terminate a secondary member on a Joint membership you will go to the member's record and select "cancel" on the member relate bar.

You will then be prompted to either terminate the entire membership or terminate a selected member, you will want to terminate the selected member.
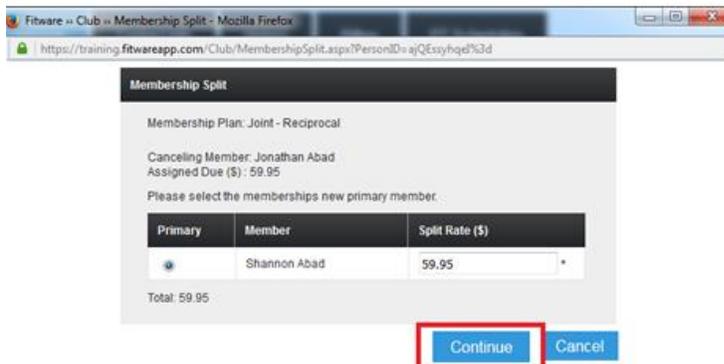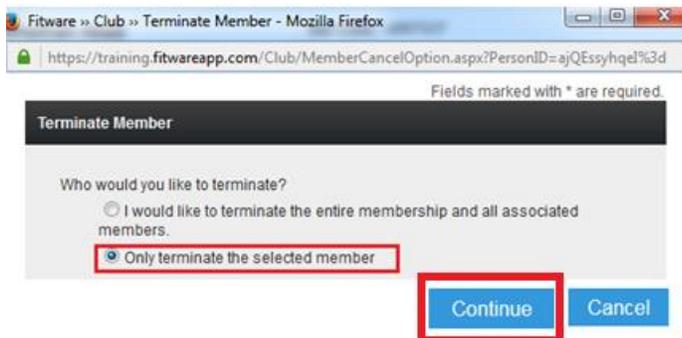
Once the member is terminated you will need to follow the instructions of converting a membership to single membership as previously instructed.

To terminate the primary member on a Family account, you will need to go to the primary member's record and select "re-spit" and select the new primary member.

Select the new primary member and change the applicable dues amount.

To terminate a secondary member on a Family membership you will go to the member's record and select "cancel" on the member relate bar.

You will then are prompted to terminate the entire membership or terminate a selected member, proceed to terminate the selected member as previously instructed.

Once the member is terminated you will need to follow the instructions of converting a membership to single or joint as previously instructed.