

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.

The screenshot shows a user interface for managing membership agreements. At the top, there are tabs for 'General', 'Contact Info', 'History', 'Billing', and 'PT Scheduling'. Below these is a profile card for 'William Noble Jr' with fields for Nickname, Phone, Birthday, Group, and Insurance Company. To the right, there are fields for Bar Code, Source, Gender, Member since, Last Visited, Contract End Date, Agreement ID, Membership Plan, Membership Category, Number of Members, Is Primary, Billing Type, and Current Status. Below the profile card is a table of 'Agreement Details' with columns for Agreement Name, Agreement Category Name, Billing Type, Start Date, End Date, Edit, Cancel, and Actions. The table contains one row with 'Single - Reciprocal' as the Agreement Name and 'Reciprocal' as the Agreement Category Name. At the bottom left, there is a 'Convert Membership' button.

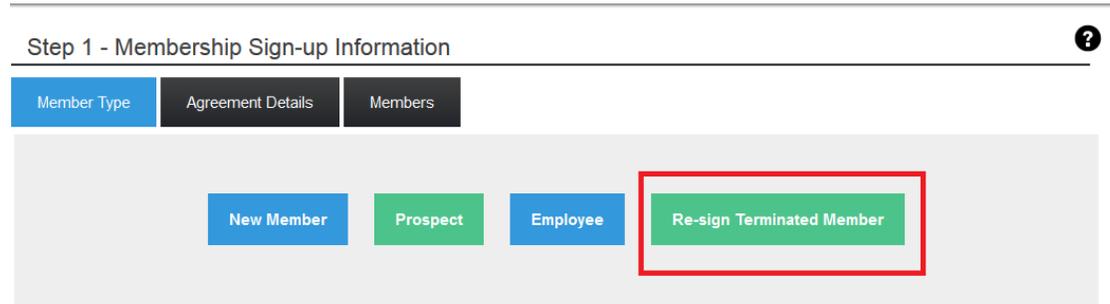
Enter the Membership Agreement Details and Select Joint or Family under the “Plan” drop down menu.

The screenshot shows the 'Step 2 - Membership Agreement Details' form. It has three tabs: 'Member Type', 'Agreement Details', and 'Members'. The 'Agreement Details' tab is active. The form is divided into two columns: 'Plan Details' and 'Additional Details'. The 'Plan Details' column contains fields for Plan Category (Reciprocal), Billing Frequency (Monthly), Plan (Joint - Reciprocal), Term (Single - Reciprocal), Start Date (7/16/2016), End Date (Auto Renew), Date of Next Payment (1 March - 2016), Program Fee (\$), Membership Dues (\$), and Dues at Sign up (\$). The 'Additional Details' column contains fields for Sales Person (Test Employee), Source, Lead Generator, and Referred by. At the bottom right, there are 'Next' and 'Cancel' buttons.

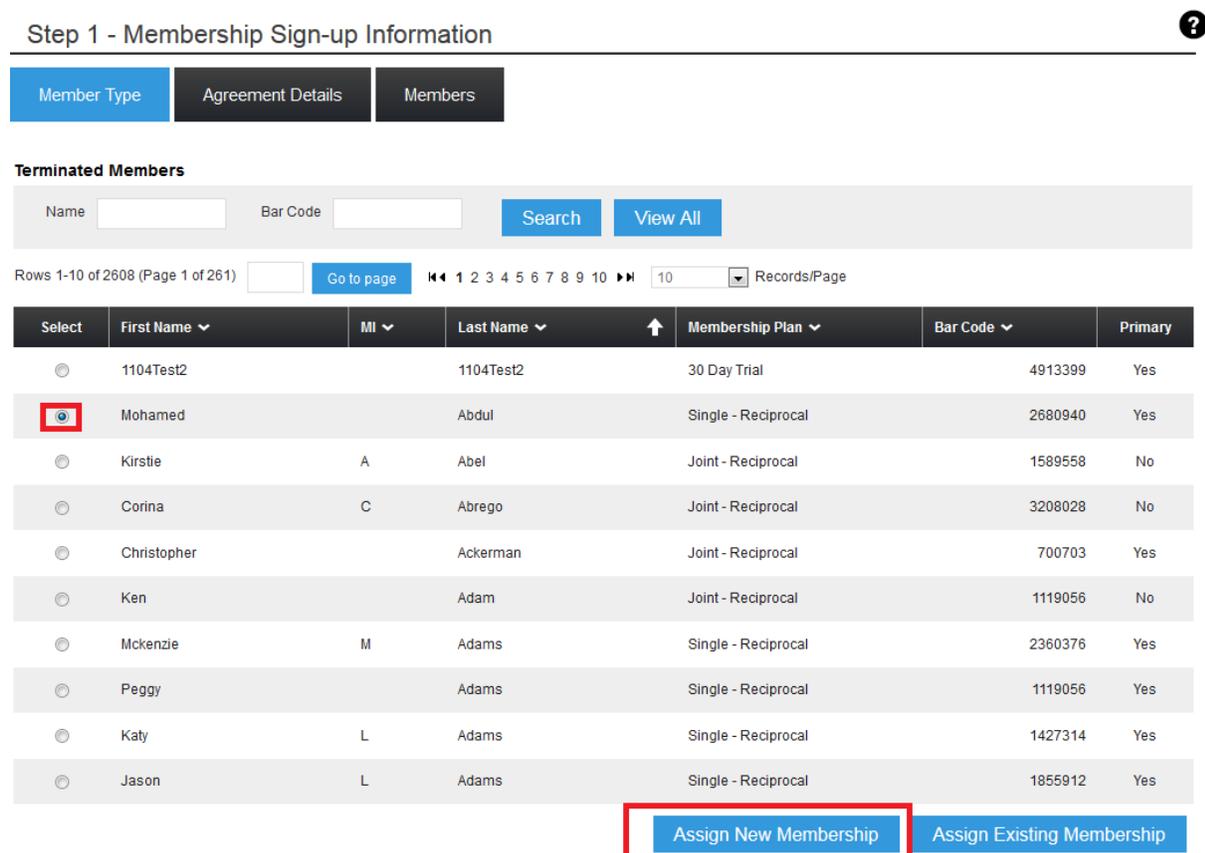
Follow the steps to add additional members and process payment information. Follow the same steps to convert a Joint membership to a Family membership.

Re-Signing a Terminated Member

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



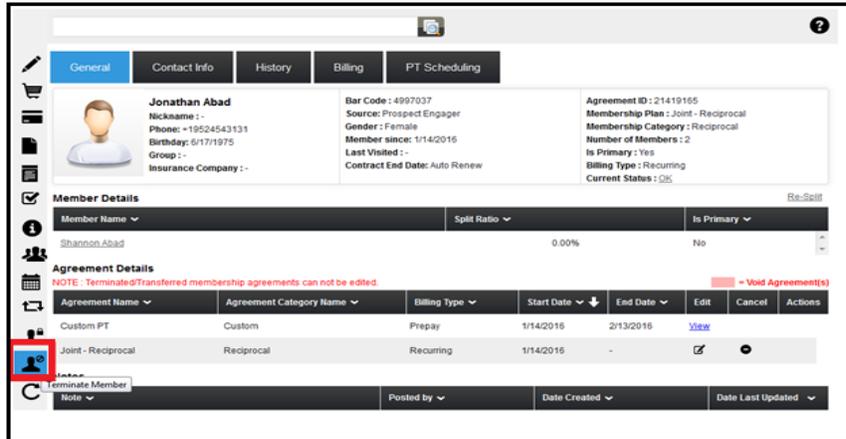
Select a terminated member and “Assign New Membership”.



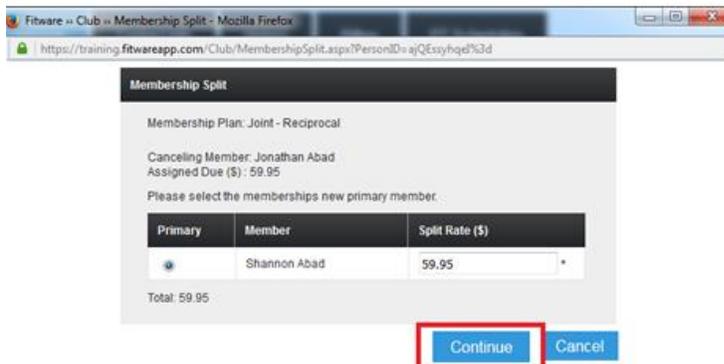
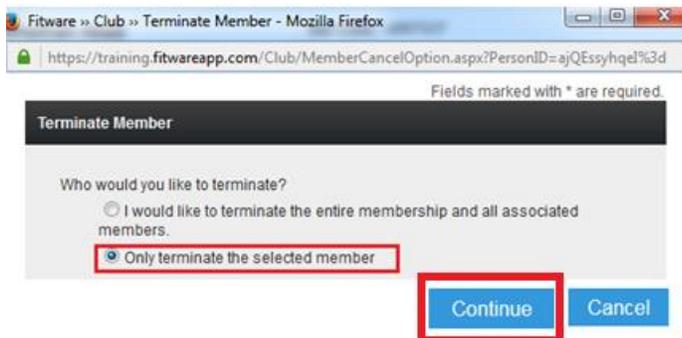
Then follow the steps to create a new membership contract as demonstrated previously.

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-split" and select the new primary member.

Member Details

Member Name	Split Ratio	Is Primary
James Bletzer	0.00%	No
Sydney Labatt	0.00%	No

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
Family - Reciprocal	Reciprocal	Recurring	1/4/2016	-			
Single - Reciprocal	Reciprocal	Recurring	3/11/2013	1/4/2016	View		

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

Assign Membership Dues

Membership Plan: Family - Reciprocal
Assigned Due (\$) : 69.95
Please select the memberships new primary member.

Primary	Member	Split (\$)
<input checked="" type="radio"/>	James Bletzer	69.95 *
<input type="radio"/>	Sydney Labatt	0.00 *
<input type="radio"/>	Kelly Labatt	69.95 *

Total: (\$) 69.95

[Continue](#) [Cancel](#)

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.

Member Details

Member Name	Split Ratio	Is Primary
James Bletzer	0.00%	No
Sydney Labatt	0.00%	No

Agreement Details

NOTE: Terminated/Transferred membership agreements can not be edited. ■ = Void Agreement(s)

Terminate Member Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Family - Reciprocal	Reciprocal	Recurring	1/4/2016	-			
Single - Reciprocal	Reciprocal	Recurring	3/11/2013	1/4/2016	View		

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

Fitware » Club » Terminate Member - Mozilla Firefox

https://training.fitwareapp.com/Club/MemberCancelOption.aspx?PersonID=ajQEssyhqel%3d

Fields marked with * are required.

Terminate Member

Who would you like to terminate?

I would like to terminate the entire membership and all associated members.

Only terminate the selected member

[Continue](#) [Cancel](#)

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