

## F120: Club Settings

(Covers default pricing and tax rates for memberships, PT services, and additional services, tax settings, freeze and decline fees, and bank defaults.)

1. Membership Plan Defaults
2. Tax Settings
3. Freeze and Decline Fees
4. Bank Defaults

### Membership Plan Defaults

Fitware allows you to change certain defaults - such as sign-up fees, recurring dues, and taxation rate - related to membership plans, PT Services, and Additional Services.

- These defaults save you time during data entry - when signing up a service, the default prices and tax rates are pre-populated for you.
- Defaults do not lock in their values - they may be changed when signing up each individual plan for each member.
- Please note that changing the defaults does ***not*** affect any existing memberships! It only affects new membership sign-ups moving forward.

Follow these steps:

1. Select Settings > Agreement, and then choose either *Membership Plan*, *Additional Services*, or *PT Services*:

The screenshot shows the Fitware TR 2.0.22 dashboard. The top navigation bar includes 'Dashboard', 'Customers', 'Prospect Engager', 'Member Engager', 'POS', 'Schedule', 'Reports', 'Employee', and 'Settings'. The 'Settings' menu is open, showing options like 'Regional Settings', 'Inventory Product', 'Agreement', 'Tax Settings', 'Email Template', 'Bank', 'Change Password', and 'Club Information'. The 'Agreement' option is highlighted in blue, and the 'Membership Plan' sub-option is highlighted in red. The main dashboard area shows a 'Quick View' section with a 'Today's Attendance' icon and a line chart titled 'Active Membership' with 'Membership' and 'Revenue' tabs. The chart shows membership numbers fluctuating between 580 and 600.

2. You will see a listing for the option you have chosen. Click the icon in the *Edit* column next to the plan where you want to make changes:

## Membership Plan List



Plan Name  Billing Type

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Name	Category	Billing Type	Price(\$)	Edit
<a href="#">Family - 12 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Family - 18 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Family - 3 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Family - 6 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Family - Custom Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Family - Home Club</a>	Home Club	Recurring	0.00	<input type="checkbox"/>
<a href="#">Family - Reciprocal</a>	Reciprocal	Recurring	69.95	<input type="checkbox"/>
<a href="#">Joint - 12 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Joint - 18 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Joint - 3 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>
<a href="#">Joint - 6 Month Pre-paid</a>	Pre-paid	Prepay	0.00	<input type="checkbox"/>

3. Make any desired edits to the sign-up amount, dues price, taxation rate, or any other fields that are allowed to be edited, then click **Save**:

## Edit Membership Plan



Fields marked with \* are required.

Plan Name

Description

Country

Category

Billing Type

Term

Price (\$)  \*

Tax Rate (%)  \*

Members Allowed Min  Max

Dates Plan is Valid

Active

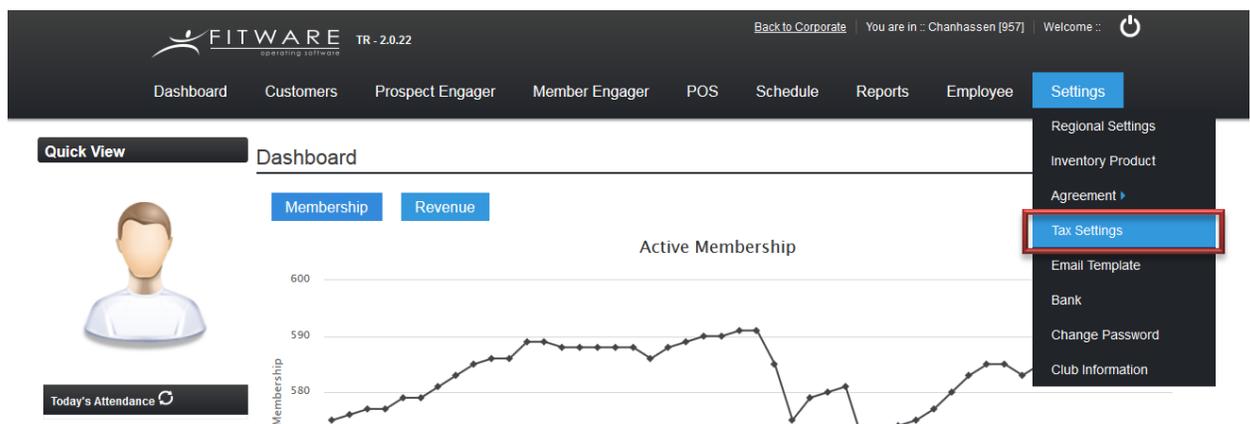
## Tax Settings

Tax settings in Fitware are divided into Categories. This has several advantages:

- A single tax category can be applied to a variety of membership plans, additional services, or inventory products.
- Easy updating is possible if a particular taxation rate ever changes.
- Detailed reporting is available showing the amount of tax collected in each taxation category.

To work with tax categories, follow these steps:

1. Select **Settings > Tax Settings**:



The screenshot shows the Fitware TR - 2.0.22 dashboard. The top navigation bar includes 'Dashboard', 'Customers', 'Prospect Engager', 'Member Engager', 'POS', 'Schedule', 'Reports', 'Employee', and 'Settings'. The 'Settings' menu is open, showing options: 'Regional Settings', 'Inventory Product', 'Agreement', 'Tax Settings' (highlighted with a red box), 'Email Template', 'Bank', 'Change Password', and 'Club Information'. The main dashboard area displays 'Active Membership' with a line graph showing membership numbers over time, ranging from approximately 575 to 600. There are also buttons for 'Membership' and 'Revenue' at the top of the graph area.

2. A list will open showing all current tax categories and their details. To edit a tax category, click on the icon in the *Edit* column:

## Tax Category List



Name  [Search](#) [View All](#)

Rows 1-6 of 6 (Page 1 of 1)  [Go to page](#) [◀](#) [1](#) [▶](#)  Records/Page

Name	Has Subcategory	Tax Rate (%)	Edit	View Subcategory
NO TAX	No	0.0000		
Tanning Sales Tax	Yes	16.8750		
Sales Tax	No	6.8750		
PT Tax	No	0.0000		
Merchandise	No	6.8750		
Massage	No	0.0000		

3. Make the needed changes to the tax rate and click **Save**:

## Edit Tax Category



Fields marked with \* are required.

Category Name

Tax Rate (%)

[Save](#) [Cancel](#)

4. **Note:** This action affects all prices for items having this tax rate, from this point moving forward.

## Freeze and Decline Fees

- Freeze fees represent the amount a member will be charged, in lieu of their normal monthly membership fee, if their membership is placed on a Freeze status.
- Decline fees represent the service amount a member will be charged if they have a declined payment.

To change the default freeze and/or decline fees, follow these steps:

1. Select **Settings > Club Information**:

2. Make any desired changes to the *Freeze Fees* and/or *Decline Fees*, then click **Save**:

**Note:** Changes will affect all freeze fees charged, and all decline fees charged, from the moment you make the change, moving forward.

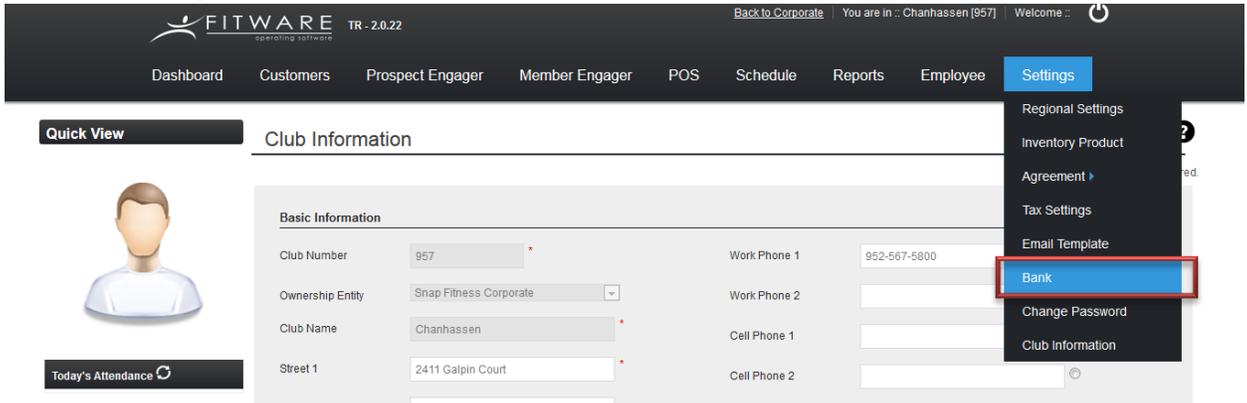
## **Bank Defaults**

Bank defaults help save time and ensure data accuracy:

- It is highly likely that many members at your facility will be using the same bank.
- Sometimes, bank information changes: a routing number may change, or a bank name may change (or may have been entered incorrectly to begin with).
- Having this information saved in a "defaults" area means that the information can be quickly updated in just one place, and then automatically applied to all members having that bank on file.

To work with bank defaults, follow these steps:

1. Select **Settings > Bank:**



2. You will see a listing of all banks and their routing number. To make changes, click the icon in the *Edit* column:

**Bank List** ?

Bank Name  Routing Number  Show

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Note: Bank branch associated with member's primary payment method can not be deleted.

Bank Name	Routing Number	Active	Edit	Delete
HSBC	402115	Yes		
BANCORPSOUTH	155330000	Yes		
CENTRAL BANK	919051141	Yes		
Barclays	202990	Yes		
Barclays	205674	Yes		
Lloyds	301006	Yes		