

## F102: Entering a Single Membership

(This is a “first pass” through the new membership entry process, and covers how to enter a membership of type Single.)

1. Overview
2. Beginning the Process
3. Agreement Details
4. Member Information
5. Save and Check-Out

### Overview

1. This is a quick course covering a first pass through the new membership entry process.
2. This course demonstrates one specific example: entering a new Single membership.
3. Plenty of additional training is available on entering memberships - don't worry about trying to understand every option/setting your first time through.

### Beginning the Process

1. Select **Customers > Sign Up**.
2. Click **New Member**.
3. Click **New Membership**.
4. You will see a blank *Agreement Details* screen, as shown below:

Step 2 - Membership Agreement Details ?

Member Type Agreement Details Members

Field(s) marked with \* are required

Plan Details	Additional Details
Plan Category <input type="text" value="Select"/>	Sales Person <input type="text" value="Select"/>
Billing Frequency <input type="text" value="Select"/>	Source <input type="text" value="Select"/>
Plan <input type="text" value="Select"/>	Lead Generator <input type="text" value="Select"/>
Term <input type="text" value="Select"/>	Referred by <input type="text" value="Select"/>
Start Date <input type="text" value="17/02/2016"/>	
End Date <input type="text" value="Auto Renew"/>	
Date of Next Payment *	
Program Fee (\$) <input type="text"/>	
Membership Dues (\$) <input type="text"/>	
Dues at Sign up (\$) <input type="text"/>	

## Agreement Details

Shown below is a typical example on how an *Agreement Details* screen would be filled out for a Single membership:

Step 2 - Membership Agreement Details ?

Member Type Agreement Details Members

Field(s) marked with \* are required

Plan Details	Additional Details
Plan Category: Reciprocal *	Sales Person: Fitware TestUser *
Billing Frequency: Fortnightly *	Source: Select
Plan: Single-Reciprocal-Fortnightly *	Lead Generator: Select
Term: Month to Month *	Referred by: Select
Start Date: 17/02/2016	
End Date: Auto Renew	
Date of Next Payment: 2/03/2016 *	
Program Fee (\$): 50.00 *	
Membership Dues (\$): 30.00 *	
Dues at Sign up (\$): 30.00 *	

[Next](#) [Cancel](#)

- **Plan Category:** *Reciprocal* is the most common choice. Further training will explain the different options available.
- **Billing Frequency:** Choose either Monthly, Fortnightly, or Weekly.
- **Plan:** Single - Reciprocal. The "Reciprocal" has automatically been added by the system, to reinforce that this is a reciprocal-type membership.
- **Term:** *Month-to-month* is the most common choice, and is the default setting.
- **Start Date:** This will always default to the current date. It can be set forward or backward as needed. (If a future date is selected, the membership will not become active - and the member's access card will not work - until the day the agreement is set to begin.)

- **Date of Next Payment:** This is automatically set to the first day of the next (upcoming) billing cycle. It can be set forward (but only within certain parameters, which will be explained more fully later).
- **Enrollment Fee:** This is set from a default value. It can be raised or lowered as desired (but only within set limits).
- **Membership Dues:** This is set from a default value. It represents the amount of the regular, recurring membership dues. It can be adjusted up or down as desired (but only within set limits).
- **Dues at Sign Up:** This is the amount (if any) collected from the member at time of sign-up. It represents the payment of their initial dues. The system automatically calculates this amount by prorating the dues by the number of days remaining in the billing period. This value can be raised, lowered, or zeroed out, as desired (but only within set limits).
- **Sales Person:** This is a required field. Select from the drop-down list of choices.
- **Sources, Lead Generator, and Referred By:** Although not required, it is highly recommended that this information be entered.

Once you have entered all the information, click **Next** at the lower-right portion of the screen, and you will be taken to the *Member Information* page.

## Member Information

Shown below is a typical example on how a *Member Information* screen would be filled out for a Single membership:

Step 3 - Member's Information ?

Member Type
Agreement Details
Members

**Personal Details**

<p>Barcode <input style="width: 100%;" type="text"/></p> <p>PIN <input style="width: 100%;" type="text"/></p> <p>Salutation <span>Select</span> <input style="width: 100%;" type="text"/></p> <p>First Name <input style="width: 100%;" type="text"/></p> <p>MI <input style="width: 100%;" type="text"/></p> <p>Last Name <input style="width: 100%;" type="text"/></p> <p>Preferred Nickname <input style="width: 100%;" type="text"/></p> <p>Gender <input checked="" type="radio"/> Male <input type="radio"/> Female</p> <p>Street 1 <input style="width: 100%;" type="text"/></p> <p>Street 2 <input style="width: 100%;" type="text"/></p> <p>Street 3 <input style="width: 100%;" type="text"/></p> <p>Country <span>Australia</span> <input style="width: 100%;" type="text"/></p> <p>State <span>UNKNOWN</span> <input style="width: 100%;" type="text"/></p> <p>City <input style="width: 100%;" type="text"/></p> <p>Zip/Postal <input style="width: 100%;" type="text"/></p> <p>Optional Field <input style="width: 100%;" type="text"/></p>	<p><b>Phone Numbers</b></p> <table border="0" style="width: 100%;"> <tr> <th>Type</th> <th>Phone</th> <th>Primary</th> </tr> <tr> <td>Cell</td> <td><input style="width: 100%;" type="text"/></td> <td><input checked="" type="radio"/></td> </tr> <tr> <td>Home</td> <td><input style="width: 100%;" type="text"/></td> <td><input type="radio"/></td> </tr> <tr> <td>Work</td> <td><input style="width: 100%;" type="text"/></td> <td><input type="radio"/></td> </tr> </table> <p>Email <input style="width: 100%;" type="text"/></p> <p>Birthday <span>Select</span> <span>Select</span> <span>Select</span> <input style="width: 100%;" type="text"/></p> <p>Emergency Name <input style="width: 100%;" type="text"/></p> <p>Emergency Number <input style="width: 100%;" type="text"/></p> <p>Image <input style="width: 100%;" type="text"/> <span>Browse</span> <input style="width: 100%;" type="text"/></p> <p style="font-size: small; color: red;">[Note: Upload .jpg, .gif, .jpeg, .png files only]</p> <p>Payment Method <span>Select</span> <input style="width: 100%;" type="text"/></p>	Type	Phone	Primary	Cell	<input style="width: 100%;" type="text"/>	<input checked="" type="radio"/>	Home	<input style="width: 100%;" type="text"/>	<input type="radio"/>	Work	<input style="width: 100%;" type="text"/>	<input type="radio"/>
Type	Phone	Primary											
Cell	<input style="width: 100%;" type="text"/>	<input checked="" type="radio"/>											
Home	<input style="width: 100%;" type="text"/>	<input type="radio"/>											
Work	<input style="width: 100%;" type="text"/>	<input type="radio"/>											

 Field(s) marked with \* are required  **Plan Details** Edit Plan   |                   |                               | |-------------------|-------------------------------| | Plan Type         | Reciprocal                    | | plan              | Single-Reciprocal-Fortnightly | | Program Fees      | 50.00                         | | Dues (\$)         | 30.00                         | | Dues at Sign up   | 30.00                         | | Start Date        | 17/02/2016                    | | End Date          | Auto Renew                    | | Next Billing Date | 2/03/2016                     | | Payment Frequency | Fortnightly                   |   **Member Information**  Sign up Fees (\$): 50.00 Dues (\$): 30.00  Add Another Member Check Out |

- Required fields are clearly marked with a red asterisk (\*).
- It is highly recommend that as much of the optional information as possible be entered also.
- *Payment Method* is required, and is a particularly important field. Use the drop-down selector to enter a bank account, credit card details, or some other payment method. *You cannot save this membership until you have added a payment method.*

After you have entered all information, follow the instructions below to complete the process.

## 5. Save and Check Out

1. Click **Save** at the very bottom-right part of the screen.
2. You will receive a confirmation message. Click **OK**.
3. Click **Check Out** at the far-right side of the screen.

## Shopping Cart

After entering a new membership, the Shopping Cart will appear similar to the following:

POS/Add Invoice ?

Please click on Add Product/Service button to select Product or Service.

John Smith

				Inventory Item	PT Service	Additional Service		
Item Name	Category	Type	QTY	Price(\$)	Tax (%)	Total(\$)	Edit	Delete
Single - Reciprocal	Reciprocal	Membership Plan	1	19.29	Sales Tax(6.8750%)	20.62		
Membership Plan Sign up	Reciprocal	Membership Plan Sign up	1	29.00	Sales Tax(6.8750%)	30.99		
						Subtotal(\$)	48.29	
						Tax Total(\$)	3.32	<input type="checkbox"/> No Tax
						Grand Total(\$)	51.61	

[Check Out](#)

- The sign-up fee and initial dues (if any) are displayed in the Shopping Cart.
- Click **Check Out** at the lower-right corner.

# Check Out

1. The Check Out screen will look like this:

Check Out ?

Sales Person  \*

John Smith Dues Amount (\$) 51.61 [Add Payment Method](#)

Payment Method	Amount Paid(\$)	Payment Status	Delete
Total(\$)		0.00	

[Back](#) [Process](#)

2. Click **Add Payment Method** in the upper-right corner. You will see the following screen:

Add Payment Method

Payment Method
Select Payment Method(s) to the left and then enter amount paid below.

- Account On File
- Credit Card
- Bank Account
- Cash
- Check
- On-Acct (Unpaid)
- Credit Memo (Owner Comp)
- Gift Certificate
- Discount
- Credit Card Terminal
- Close

3. Select the payment method at the left, and enter the amount paid. In the example below, we have chosen cash:

**Add Payment Method**

Payment Method

Fields marked with \* are required.

Cash Payment

Amount (\$)  \*

Save and Close Save and Add Another Cancel

Close

3. Click **Save and Close**.
4. Click **Process**.

## **Payment Receipt**

1. You will receive the Payment Receipt, which looks like this:

# Payment Receipt

1 of 1

**Invoice Number :** INV59528063

**Date :** Tuesday, February 16, 2016 11:18:38 AM

**Receipt Number :** 51900238

**John Smith [61291602773]**

**Chanhassen [957]**

2411 Galpin Court,

Chanhassen,

Minnesota,

55317,

United States

Contact Email : chanhassen@snapfitness.com

Contact Phone : 952-567-5800

No.	Items	Quantity	Amount(\$)	Discount(\$)	Total Amount(\$)
1	Single - Reciprocal	1	19.29	0.00	19.29
2	Single - Reciprocal Membership Plan Sign up	1	29.00	0.00	29.00

Tax Category	Tax Rate	Amount(\$)
Sales Tax	6.8750	3.32

Payment Method	Amount(\$)	Amount(\$)
Cash	51.61	
		Tax 3.32
		Total Paid 51.61
		Remaining Payment 0.00

**Sales Person :** Ariel Lindahl

Finish

3. Click the print icon in the menu bar at the top if you wish to print the receipt.
4. Click **Finish** in the lower-right corner when done.