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.)

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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:

Agreement Details

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

- **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:

- 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	☐ 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:

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

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

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

Payment Receipt

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

Payment Receipt

Invoice Number : INV59528063
Receipt Number : 51900238

Date : Tuesday, February 16, 2016 11:18:38 AM
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 ₁
2	Single - Reciprocal Membership Plan Sign up	1	29.00	0.00	29.00 ₁

Tax Category	Tax Rate	Amount($)
₁ 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.