

F126: Freezing Multiple Member Agreements

Below is a list of actions you will need to take to freeze a Multiple Member agreement.

- 1.) Make sure to have valid form of payment
- 2.) Change dues rate
- 3.) Re-split the dues to set the new primary
- 4.) Freeze the membership
- 5.) Change the status of the members who are not freezing;
Part 1=Freeze effective immediately
Part 2=Future start date for Freeze
- 6.) You will need to set a task for yourself to change the dues back to the joint rate before billing for that draft when they will all active again.

The screenshot displays a software interface for managing a member's information. At the top, there are tabs for 'General', 'Contact Info', 'History', 'Billing', 'PT Scheduling', and 'Add Member'. The 'General' tab is active, showing a profile for Wyatt Adams 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, and Contract End Date. Further right, there are fields for Agreement ID, Membership Plan, Membership Category, Number of Members, Is Primary, Billing Type, and Current Status. Below this is a 'Member Details' section with a 'Re-Split' link and a table showing the split ratios for Brenda Adams (0.00%, No) and Scott Adams (100.00%, Yes). The 'Agreement Details' section includes a red note: 'NOTE: Terminated/Transferred membership agreements can not be edited.' and a table with columns for Agreement Name, Agreement Category Name, Billing Type, Start Date, End Date, Edit, Cancel, and Actions. The first row shows 'Family - Reciprocal', 'Reciprocal', 'Recurring', '12/22/2014', and a red box indicating a 'Void Agreement(s)'.

Member Name	Split Ratio	Is Primary
Brenda Adams	0.00%	No
Scott Adams	100.00%	Yes

Agreement Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Family - Reciprocal	Reciprocal	Recurring	12/22/2014	-			

- 1.) Wyatt is currently the primary and would like to go on a freeze. Brenda and Scott would like to stay active and Brenda has offered to be the new primary. Click on Brenda's name, the first thing we need to do is make sure that Brenda has a valid form of payment on file, if she does not, you will need to add a payment method in her billing tab. Make sure the bubble icon is selected for the credit card or bank account you would like the dues to draft from.

General | Contact Info | History | **Billing** | PT Scheduling | Add Member

Brenda Adams
 Nickname : -
 Phone: 612-242-1730
 Birthday: 8/23/1962
 Group : -
 Insurance Company : HP

Bar Code : 4124353
 Source: Drive By
 Gender : Female
 Member since: 11/29/2014
 Last Visited : -
 Contract End Date: Auto Renew

Agreement ID : 20274237
 Membership Plan : Family - Reciprocal
 Membership Category : Reciprocal
 Number of Members : 3
 Is Primary : Yes
 Billing Type : Recurring
 Current Status : [OK](#)

Current Due: \$0.00
 Future Due: \$0.00
 Unapplied Amount : \$0.00
 Total: \$0.00

Next Dues Post Date: 4/1/2016
 Last Billing Date: -
 Membership Price : \$49.11
 Wellness Account Balance : \$0.00

Payment History | Invoice History | Current Due | Future Due | Customer Account | **Payment Methods** | Statement

Primary payment method changed successfully

[Add Payment Method](#) | [Account Adjustment](#)

Primary	Account Name	Account Number	Exp. Date	Update Date	Payment Method	Reference #	Registration Status	Delete	Edit
<input checked="" type="radio"/>	Brenda Adams	*****1111	1/2018	3/23/2016	Credit Card	5228405	PENDING-SUBMISSION		Edit
<input type="radio"/>	Brenda Adams		-	11/17/2015	Statement	4836785	PENDING-SUBMISSION		Edit

2.) Next we will need to change the dues rate. The family dues rate is currently set at \$54.95, since Wyatt will be on a freeze the club will need to change the dues rate to the Joint dues rate, which is currently \$45.95. To do this you would click on the edit icon of the agreement line

General | Contact Info | History | Billing | PT Scheduling | **Add Member**

Brenda Adams
 Nickname : -
 Phone: 612-242-1730
 Birthday: 8/23/1962
 Group : -
 Insurance Company : HP

Bar Code : 4124353
 Source: Drive By
 Gender : Female
 Member since: 11/29/2014
 Last Visited : -
 Contract End Date: Auto Renew

Agreement ID : 20274237
 Membership Plan : Family - Reciprocal
 Membership Category : Reciprocal
 Number of Members : 3
 Is Primary : No
 Billing Type : Recurring
 Current Status : OK

Member Details [Re-Split](#)

Member Name	Split Ratio	Is Primary
Wyatt Adams	0.00%	No
Scott Adams	100.00%	Yes

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
Custom PT	Custom	Prepay	5/21/2015	6/20/2015	View		
Family - Reciprocal	Reciprocal	Recurring	12/22/2014	-	✎		
Joint - Reciprocal	Reciprocal	Recurring	11/29/2014	12/22/2014	View		

Change the rate from \$54.95 to \$45.95 then click Save. Anything with a red asterisk is a required field and will need to be filled in to save changes successfully.

Edit Membership Agreement ?

General
Contact Info
History
Billing
PT Scheduling
Add Member



Brenda Adams
 Nickname : -
 Phone: 612-242-1730
 Birthday: 8/23/1962
 Group : -
 Insurance Company : HP

Bar Code : 4124353
 Source: Drive By
 Gender : Female
 Member since: 11/29/2014
 Last Visited : -
 Contract End Date: Auto Renew

Agreement ID : 20274237
 Membership Plan : Family - Reciprocal
 Membership Category : Reciprocal
 Number of Members : 3
 Is Primary : No
 Billing Type : Recurring
 Current Status : OK

Edit Membership Agreement

Term: Month to Month *

Membership Dues: * ←

Dues Tax Rate (%): Sales Tax (6.8750%) *

Sales Person: Select *

End Date: Auto Renew

Date of Next Payment: April - 2016

Agreement ID: 20274237

Created By: Ashley Mulford

Created Date: 12/22/2014 12:33:29 PM

Last Updated By: Administrator Administrator

Last Updated Date: 1/29/2015 12:57:43 PM

Save

Cancel

Once saved you will be navigated back to Brenda's general tab.

General
Contact Info
History
Billing
PT Scheduling
Add Member



Brenda Adams
 Nickname : -
 Phone: 612-242-1730
 Birthday: 8/23/1962
 Group : -
 Insurance Company : HP

Bar Code : 4124353
 Source: Drive By
 Gender : Female
 Member since: 11/29/2014
 Last Visited : -
 Contract End Date: Auto Renew

Agreement ID : 20274237
 Membership Plan : Family - Reciprocal
 Membership Category : Reciprocal
 Number of Members : 3
 Is Primary : No
 Billing Type : Recurring
 Current Status : OK

Member Details Re-Split

Member Name	Split Ratio	Is Primary
Wraff Adams	0.00%	No
Scott Adams	100.00%	Yes

Agreement Details - Void Agreement(s)

NOTE : Terminated/Transferred membership agreements can not be edited.

Agreement Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Custom PT	Custom	Prepay	5/21/2015	6/20/2015	View		
Family - Reciprocal	Reciprocal	Recurring	12/22/2014	-	View	Cancel	
Joint - Reciprocal	Reciprocal	Recurring	11/29/2014	12/22/2014	View		

3.) Now, we need to make Brenda the primary. Click on the Re-split button.

Brenda Adams
Nickname: -
Phone: 612-242-1730
Birthday: 8/23/1962
Group: -
Insurance Company: HP

Bar Code: 4124353
Source: Drive By
Gender: Female
Member since: 11/29/2014
Last Visited: -
Contract End Date: Auto Renew

Agreement ID: 20274237
Membership Plan: Family - Reciprocal
Membership Category: Reciprocal
Number of Members: 3
Is Primary: No
Billing Type: Recurring
Current Status: OK

Member Details

Member Name	Split Ratio	Is Primary
Wyatt Adams	0.00%	No
Scott Adams	100.00%	Yes

Agreement Details
NOTE: Terminated/Transferred membership agreements can not be edited.

Agreement Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Custom PT	Custom	Prepay	5/21/2015	6/20/2015	View		
Family - Reciprocal	Reciprocal	Recurring	12/22/2014	-			
Joint - Reciprocal	Reciprocal	Recurring	11/29/2014	12/22/2014	View		

Change the primary bubble to Brenda make her dues rate \$45.95 and Wyatt's \$0.00.

Assign Membership Dues

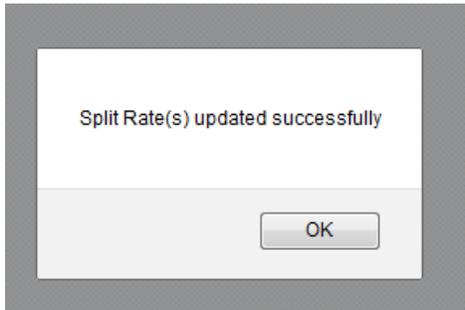
Membership Plan: Family - Reciprocal
Assigned Due (\$) : 45.95
Please select the memberships new primary member.

Primary	Member	Split (\$)
<input checked="" type="radio"/>	Brenda Adams	45.95 *
<input type="radio"/>	Scott Adams	0.00 *
<input type="radio"/>	Wyatt Adams	0.00 *

Total: (\$) 45.95

Continue **Cancel**

You should get a box that pop-ups that states the split rate(s) updated successfully.



This will take you back to Brenda's general tab.

Part 1: Freeze effective immediately

4.) The next step is to go and set the freeze. Click on the freeze icon on the relate bar.

Member Name	Split Ratio	Is Primary
Wyatt Adams	0.00%	No
Scott Adams	0.00%	No

Agreement Name	Agreement Category Name	Billing Type	Start Date	End Date	Edit	Cancel	Actions
Custom PT	Custom	Prepay	5/21/2015	6/20/2015	View		
Family - Reciprocal	Reciprocal	Recurring	12/22/2014	-	View	Edit	Cancel
Joint - Reciprocal	Reciprocal	Recurring	11/29/2014	12/22/2014	View		

The end date will need to be 4/30/16; this will change his status to ok, effective 5/1/16. A pop up box will appear where you will enter in the terms of the Freeze. In this example, Wyatt would like the Freeze to start immediately and would like to become active again on 5/1/16.

Membership Freeze:

Employee: Peter Taunton

Start Date: 3/23/2016

End Date: 4/30/2016

Reason: Traveling

Note:

Save Cancel

After clicking save, you will see the membership Freeze History confirming the information just entered.

Membership Freeze ?

General | Contact Info | History | Billing | PT Scheduling | **Add Member**

Brenda Adams
Nickname : -
Phone: 612-242-1730
Birthday: 8/23/1962
Group : -
Insurance Company : HP

Bar Code : 4124353
Source : Drive By
Gender : Female
Member since: 11/29/2014
Last Visited : -
Contract End Date: Auto Renew

Agreement ID : 20274237
Membership Plan : Family - Reciprocal
Membership Category : Reciprocal
Number of Members : 3
Is Primary : Yes
Billing Type : Recurring
Current Status : Freeze

Membership Freeze History

Employee	Start Date	End Date	Reactivation Date	Reason	Note
Peter Taunton	3/23/2016	4/30/2016	-	Traveling	

Membership Freeze:

Reactivate **Cancel**

- 5.) Since a freeze applies to the whole account, the next step is to go and unfreeze each member who will be staying active. Go to the primary's members General tab and click the change status icon on the relate bar.

Membership Freeze ?

General | Contact Info | History | Billing | PT Scheduling | **Add Member**

Brenda Adams
Nickname : -
Phone: 612-242-1730
Birthday: 8/23/1962
Group : -
Insurance Company : HP

Bar Code : 4124353
Source : Drive By
Gender : Female
Member since: 11/29/2014
Last Visited : -
Contract End Date: Auto Renew

Agreement ID : 20274237
Membership Plan : Family - Reciprocal
Membership Category : Reciprocal
Number of Members : 3
Is Primary : Yes
Billing Type : Recurring
Current Status : Freeze

Membership Freeze History

Employee	Start Date	End Date	Reactivation Date	Reason	Note
Peter Taunton	3/23/2016	4/30/2016	-	Traveling	

Membership Freeze:

Reactivate **Cancel**

Note: A red arrow points to the change status icon (a square with a circular arrow) in the left-hand toolbar, which is positioned above the history table.

A pop-up box will generate; select the members whose status you would like to change. Here we have selected Brenda and Scott.

Select Members

All

Select Member

- Wyatt Adams
- Brenda Adams
- Scott Adams

Continue **Cancel**

Next, change the status to ok, select today's date and click save.

Member Status Change

Status:

Effective Date:

Save **Cancel**

You will receive a message confirming the status change.

Member status information added successfully.

OK

Part 2: Future start date for Freeze

If the freeze is set to start in the future, you will go to each member's status history that will be staying active, and delete both the future freeze and the OK status.

Member Profile: Brenda Adams

General Information:
 Nickname: -
 Phone: 612-242-1730
 Birthday: 8/23/1962
 Group: -
 Insurance Company: HP

Membership Information:
 Bar Code: 4124353
 Source: Drive By
 Gender: Female
 Member since: 11/29/2014
 Last Visited: -
 Contract End Date: Auto Renew

Agreement Information:
 Agreement ID: 20274237
 Membership Plan: Family - Reciprocal
 Membership Category: Reciprocal
 Number of Members: 3
 Is Primary: Yes
 Billing Type: Recurring
 Current Status: OK

Status History

Choose type of history: Status History

Search: [] Search View All

Rows 1-6 of 6 (Page 1 of 1) Go to page [] Records/Page [20]

■ = Future Status Change(s)

Membership	Status	Begin Date	End Date	Created Date	CreatedBy	Description	Reason	Cancel
Family - Reciprocal	OK	5/1/2016		3/24/2016	Peter Taunton		Traveling	⊖ ←
Family - Reciprocal	Freeze	3/31/2016	4/30/2016	3/24/2016	Peter Taunton		Traveling	⊖ ←

6.) Lastly, you need to set a task for you to change the membership dues back to the Family rate. This needs to be done before billing for the next draft is pulled so the Family membership rate will apply when the membership becomes active again. To set a task; Click on the task icon on the relate bar.

Member Profile: Brenda Adams

General Information:
 Nickname: -
 Phone: 612-242-1730
 Birthday: 8/23/1962
 Group: -
 Insurance Company: HP

Membership Information:
 Bar Code: 4124353
 Source: Drive By
 Gender: Female
 Member since: 11/29/2014
 Last Visited: -
 Contract End Date: Auto Renew

Agreement Information:
 Agreement ID: 20274237
 Membership Plan: Family - Reciprocal
 Membership Category: Reciprocal
 Number of Members: 3
 Is Primary: Yes
 Billing Type: Recurring
 Current Status: OK

Member Details

Member Name	Split Ratio	Is Primary
Wvatt Adams	0.00%	No
Scott Adams	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
Custom PT	Custom	Prepay	5/21/2015	6/20/2015	View		
Family - Reciprocal	Reciprocal	Recurring	12/22/2014	-	✎	⊖	
Joint - Reciprocal	Reciprocal	Recurring	11/29/2014	12/22/2014	View		

Next, click on Add Task

Task List

General | Contact Info | History | Billing | PT Scheduling | **Add Member**

Brenda Adams
Nickname : -
Phone: 612-242-1730
Birthday: 8/23/1962
Group : -
Insurance Company : HP

Bar Code : 4124353
Source: Drive By
Gender: Female
Member since: 11/29/2014
Last Visited : -
Contract End Date: Auto Renew

Agreement ID : 20274237
Membership Plan : Family - Reciprocal
Membership Category : Reciprocal
Number of Members : 3
Is Primary : Yes
Billing Type : Recurring
Current Status : OK

Task: Select Employee: Select
From Date: To Date: Search View All **Add Task**

Task	Assigned By	Assigned To	Start Time	End Time	Results	Edit	Delete
No Record(s) found							

Below is an example of what will need to be filled out. Please note the required fields are marked with a red asterisk.

Add Task

General | Contact Info | History | Billing | PT Scheduling | **Add Member**

Fields marked with * are required.

Brenda Adams
Nickname : -
Phone: 612-242-1730
Birthday: 8/23/1962
Group : -
Insurance Company : HP

Bar Code : 4124353
Source: Drive By
Gender: Female
Member since: 11/29/2014
Last Visited : -
Contract End Date: Auto Renew

Agreement ID : 20274237
Membership Plan : Family - Reciprocal
Membership Category : Reciprocal
Number of Members : 3
Is Primary : Yes
Billing Type : Recurring
Current Status : OK

Task: Note *
Start Date/Time: 4/15/2016 12:00 AM *
End Date/Time: 4/15/2016 11:00 PM *
Assign To: Peter Taunton *
Results: Select
Additional Information: Change dues rate from Joint membership to Family membership for 5/1/16 dues.

Save Cancel

Click Save.

You can now view the note entered in the tasks below from the member's General tab.

Member Details

Brenda Adams
Nickname : -
Phone: 612-242-1730
Birthday: 8/23/1962
Group : -
Insurance Company : HP

Bar Code : 4124353
Source: Drive By
Gender : Female
Member since: 11/29/2014
Last Visited : -
Contract End Date: Auto Renew

Agreement ID : 20274237
Membership Plan : Family - Reciprocal
Membership Category : Reciprocal
Number of Members : 3
Is Primary : Yes
Billing Type : Recurring
Current Status : OK

Member Details [Re-Split](#)

Member Name	Split Ratio	Is Primary
Walt Adams	0.00%	No
Scott Adams	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
Custom PT	Custom	Prepay	5/21/2015	6/20/2015	View		
Family - Reciprocal	Reciprocal	Recurring	12/22/2014	-	View	Cancel	
Joint - Reciprocal	Reciprocal	Recurring	11/29/2014	12/22/2014	View		

Tasks

Task	Assigned By	Assigned To	Start Time	End Time	Result
Note	Shannon McHugh	Peter Taunton	4/15/2016 12:00:00 AM	4/15/2016 11:00:00 PM	-

You can also view all tasks from your top menu bar: Hover over the Member Engager tab and click on Tasks.

Customers Prospect Engager **Member Engager** POS Schedule Reports Employee Settings

Notes

Document

Tasks

Member Details

Brenda Adams
Nickname : -
Phone: 612-242-1730
Birthday: 8/23/1962
Group : -
Insurance Company : HP

Bar Code : 4124353
Source: Drive By
Gender : Female
Member since: 11/29/2014
Last Visited : -
Contract End Date: Auto Renew

Agreement ID : 20274237
Membership Plan : Family - Reciprocal
Membership Category : Reciprocal
Number of Members : 3
Is Primary : Yes
Billing Type : Recurring
Current Status : OK

Member Details [Re-Split](#)

Member Name	Split Ratio	Is Primary
Walt Adams	0.00%	No
Scott Adams	0.00%	No