Entering a Punch Card 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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<u>Overview</u>

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 Punch Card Membership.

<u>Beginning the Process</u>

1. Select **Customers** > **Sign Up**.
2. Click **New Member**.
3. 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 Punch Card membership:

Plan Details				
Plan Category	Punch Card	▼	*	
Billing Frequency	Monthly	▼	*	
Plan	Punch Card	▼	*	
Term	Month to Month	▼	*	
Start Date	2/16/2016	🗓		
End Date	Auto Renew			
Date of Next Payment	1 March - 2016	▼	*	
Program Fee ($)	0.00	*		
Membership Dues ($)	0.00	*		
Dues at Sign up ($)	0.00	*		

Additional Details			
Sales Person	Select	▼	*
Source	Select	▼	
Lead Generator	Select	▼	
Referred by	Select	▼	

- **Plan Category:** *Punch Card*s the most common choice. Further training will explain the different options available.
- **Plan:** Punch Card.
- **Term:** *Month-to-month* should be selected
- **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 will not be able to use their punch card 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) month. It can be set forward (but only within certain parameters, which will be explained more fully later).
- **Payment Frequency:** *Monthly*. This setting cannot be changed for this type of membership.
- **Enrollment Fee:** This is set from a default value of $0. It can be raised or lowered as desired (but only within set limits).
- **Membership Dues:** This is set from a default value of $0. It represents the amount of the regular, recurring membership dues. It can be adjusted up or down as desired (but only within set limits). Punch Card memberships do not have membership dues
- **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 monthly dues by the

number of days remaining in the month. This value can be raised, lowered, or zeroed out, as desired (but only within set limits). Punch Card memberships due not have dues at sign up.

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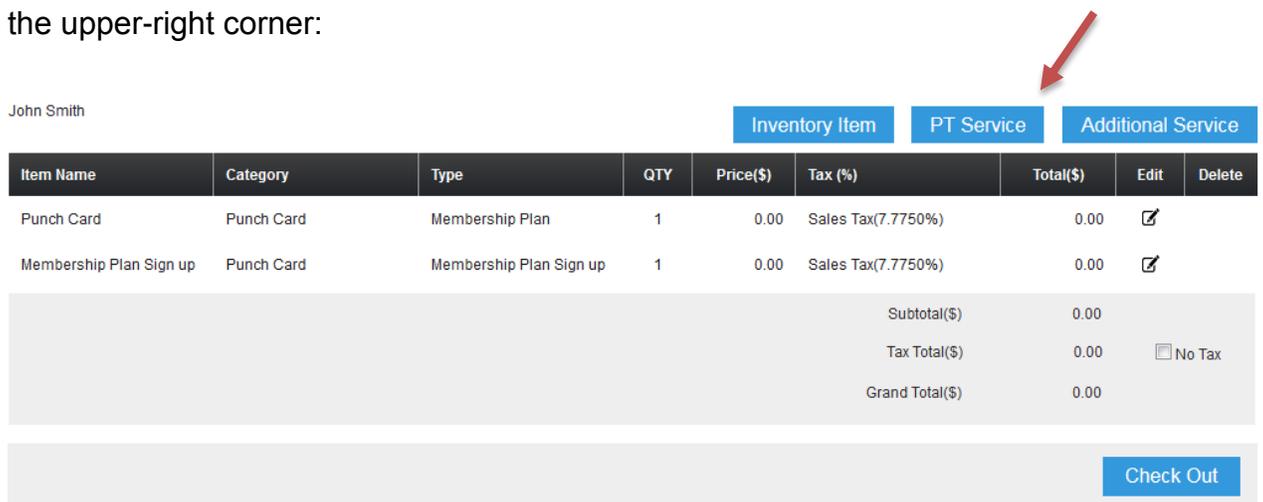
After you have entered all information, follow the instructions below to complete the process.

<u>Save and Check Out</u>

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.

Punch Card Purchase
1. When you arrive at the Point of Sale screen, you will see a **PT Service** button at the upper-right corner:

2. Click **PT Service**, and choose either the 10-Card Punch or the 20-Card Punch.
3. Select the Sales Person.
4. As you add each PT Service, it appears as an item in the Shopping Cart.

Item Name	Category	Type	QTY	Price($)	Tax (%)	Total($)	Edit	Delete
Punch Card	Punch Card	Membership Plan	1	0.00	Sales Tax(7.7750%)	0.00	✎	
Membership Plan Sign up	Punch Card	Membership Plan Sign up	1	0.00	Sales Tax(7.7750%)	0.00	✎	
10 Card Punch	Pre-Programmed	PT Service	1	165.00	Sales Tax(7.7750%)	177.83	✎	⊖

John Smith

Inventory Item   PT Service   Additional Service

Subtotal($)	165.00
Tax Total($)	12.83	☐ No Tax
Grand Total($)	177.83

Check Out

5. After you have paid and checked out, the newly selected service(s) are automatically added to the member.

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
20 Card Punch	Pre-Programmed	Prepay	12/18/2015	6/17/2016	✎	⊖	
Punch Card	Punch Card	Recurring	12/18/2015	-	✎	⊖	

Access Card Purchase

1. Selling the access card will be done through the POS on the relay bar under inventory item.
2. Select Inventory Item

POS/Add Invoice   ❓

Please click on Add Product/Service button to select Product or Service.   Inventory Item   PT Service   Additional Service

3. Select Yoga Access Card. The default price is already in the system at $10.00 but can be edited in your club settings.

☐	Workshop - Non-Member	0	0.00
☑	Yoga Access Card	1	10.00
☐	Yoga Mat	0	0.00

Sell   Cancel

4. Select **Sell** and go through the **Check Out** process.