

Fitware Reports

Revenue Reports-

- **Revenue Summary - Run 1st of the month** - Displays summary of the total amount of payments made during date range.
 - Track current and historical revenue
 - Use historic numbers to set future revenue goals
- **Revenue Detail Report- Run last 2 weeks of the month-** Detailed list of each payment recorded. Included is the member name, payment date, form of payment, total amount and attendant entering payment record.
 - Use to track each payment record and to reconcile deposits

Member Draft Reports

- **Member Draft Billing Detail- Run 1st of the month-** Lists most recent and historic monthly draft submission details. Included are each member and amount submitted, result of submission and method of payment
 - Use to verify each member billed and amount
- **Member Draft Billing Summary-** Displays summary of gross amount submitted, total declines (as of time of report generation) and amounts submitted for each payment method
 - Track recent draft totals
 - Use to set future draft goals and to reconcile billing deposits
- **Pre Billing Member Detail Report-Run last three weeks of the month-** Lists each member that would be submitted (as of time of report generation) and amount that will be billed on upcoming draft. Upcoming terminated members and members that are not set to bill are excluded
 - Use to forecast upcoming draft and assess goal progression
- **Not Billed Membership Pre Billing- Run middle of the month-** Lists each responsible member that would not be included in the upcoming monthly draft with reason
 - Audit members to verify they should NOT be billed
- **Not Billed Membership Post Billing- Run middle of the month-** Shows all active responsible members that were NOT included in the most recent draft with reason

Membership Reports

- **Membership List- Run 1st of the month-(Fitware Audit-Towards the end of the month)-**Snapshot of all active responsible members. Shown are membership start/end dates, current status, monthly dues amount, membership plan, next payment date and current account balance.
 - Used to audit membership data by sorting relevant fields

- **Membership Sales Detail-Run once a week-** List of each new responsible member for memberships sold over a date range. Included are membership type (reciprocal, home club, prepaid), membership plan, fees at sign-up, term, payment method, sales person and sign-up date.
 - Review each membership sale to verify correct amounts are being collected and entered for each membership
- **Membership Expiration Termination- Run 1st of the month-** List of primary members with agreements ending over selected date range.
 - Track those with expiring/terminating agreements this month
 - Use to potentially contact those ending and encourage to renew

Member Reports

- **Members Birthdays- Run 1st of the month -** Displays all former and current members with birthdays over a date range. Includes contact information. Filter only OK status to see active only.
 - Use to identify those you wish to send birthday offers/greetings
- **Member Check-In Calls Report- Run Twice a week for the month** Shows members who are due a check-in call based off their join date (last week, 3 weeks ago) based off recommended intervals

Personal Training

- **PT Sales Detail-Run about once a week-**Shows detail breakdown of PT Summary for each member. Results show sales person, total of the original sale, amount paid during date range selected and payable commission amount.
 - Use to track PT sales and commissions and to establish future goals

Reciprocity Report

- **Reciprocity report- Run about the 20th of each month.** –Shows all members who have transferred in or out of your club over a date range. Shows the club they transferred from and the club that they transferred too. Also shows if the transfer was due to reciprocity or a manual request.
 - Use to track member transfers and to verify the membership amounts and member information that are coming into the club.

Financial Reports

- **Accounts Receivable-Run 1 and last week of the month-** Shows all members with an unpaid balance. Breaks out members by current status and shows if balances by less than 30, greater than 30/60/90 days.
 - Identify members to recover balance or terminate membership
- **Declines by Date Range- Run once a week-** Detailed list of each member that declined or had a failed payment over a date range. Shows the form of payment, amount of billing attempt and reason* for decline. (*The reasons come from generic codes sent by member's financial institution. Neither Fitware

nor Snap control the reasons or have more information other than what is displayed.)

- Use to identify credit card declines and reattempt manually. If manually collected waive the NSF fee unless you have notified member
 - Follow up at least 3 times in the first 20 days of the month to recover unpaid balances
 - Terminate if no payment or arrangement is made by the 26th of declined month.
- **Payment Method Status-Run once a month-** Shows all members and the status of their payment method on file
 - Use to identify credit cards that are Invalid
 - If member has "invalid credit card", verify the exact name on credit card and update if different from in Fitware. Draft billing is more stringent than POS and even a difference in displayed name can cause decline (Jim Smith vs. James Smith)

