

FINDING DUPLICATE EMAIL ADDRESSES THAT ARE BOTH MEMBERS & TERMINATED MEMBERS IN FITWARE

If you have a member, a terminated member, and a prospect with the same email addresses, and you follow-through with e-mailing each category, each month, your members will receive multiple and contradicting information based on how many categories that fall into, Member, Terminated member, and prospect.

To solve this issue, we have made it very easy for you to find the duplicates.

The excel file “Duplicates” that you should have received needs to be placed on your desktop without changing the name. Best to just copy and paste or drag to your desktop. Do not do a “Save As” function.

Before downloading – Open your downloads folder and make sure you do not have any documents titled, “MemberList”. If so, just delete them.

In Fitware go to Reports → Member Reports → Members List. Export the report to CSV

Repeat the above steps for the Terminated Members:

- In Fitware go to Reports → Member Reports → Members List
- Use the “Status” filter on the report to mark only the “terminated” option and click “view report.”
- Export the report to CSV

Member List ?

Membership Category: Home Club,Pre-paid,Reciprocal | Membership Plan: Single - Reciprocal,Joint - Reciprocal

Status: Freeze,OK,Delinquent,Collections,Pe | Payment Method: Bank,Credit Card,Statement,Savings

Show only primary members: (Select All) Freeze OK Delinquent Terminated Collections Pending Delinquent Suspended

Members List

Membership Category :Ho

Membership Plan: Single - Home Club,Joint - Home Club,Family - Home Club,Single - Custom Pre-paid,Joint - Custom Pre-paid,Famil

Month Pre-paid,Joint - 18

Day (Anniversary Billing),Standard - Joint - Anniversary - Monthly,Family - Reciprocal - 7 Day (Anniversary Billing),Family - Reciprocal - 14 Day (Anniversary Billing),Standard - Family - A

Anniversary - Monthly,Transformation - Family - Anniversary - Monthly,Foundation - Single - Anniversary - Monthly,Foundation - Joint - Anniversary - Monthly,Foundation - Family - Anniver

Status :Freeze,OK,Delinquent,Collections,Pending Delinquent,Suspended

Payment Method :Bank,Credit Card,Statement,Savings Account

Member Name	Barcode	Type	Address	City Name	State Name	Zip Code	Email	Primary Phone	Cell Phone	Gender
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Next – In Fitware, click on the “Prospect Engager Tab”

FITWARE Prospect Engager Search for a person

Home News Feed Performance Guests **People** Calendar Today Next call Reports More ... Mike (Chanhassen)

People

760 found, 760 selected [Refine list](#)

Name	Status	Salesperson	Source	Phone
<input checked="" type="checkbox"/> 2019012321 2019012321	Enquiry		Visitor Registration App	M (2)
<input checked="" type="checkbox"/> 201902010223 WebTest	Enquiry			M 19

More Bulk Actions

- Export To CSV
- Change Salesperson
- Add a Tag
- Add a Call
- Change Status to Not Interested

Click on “People”
 Click on “More Bulk Actions”
 Export to CSV

Depending on how many prospects you have. One of two things will happen.

#1 The file with either download, like the other two.

#2 It will be too large and they will be e-mailed to your inbox.

- Making sure all three Documents are open.
- On the document titled “MemberList”
- Click on the bottom and add two sheets
- With the document titled, “MemberList 1”Click the top left corner of the sheet (selecting all cells) and copy and paste on “Sheet 1” of

“MemberList” (Click in A1 and just paste). When complete, (click in A1 again).

- With the document titled, “Name of Club” Click the top left corner of the sheet (selecting all cells) and copy and paste on “Sheet 2” of “MemberList” (Click in A1 and just paste). (click in A1 again).
- Click on the MemberList tab and click in A1).

Open the Excel File, (Which should be placed on your desktop). Open the document “Duplicates” then minimize. On the “MemberList” document, Click on the developer tab, click Macros, click “Run”. (If you do not have the “Developer Tab, google, “How to add the Developer tab in Excel). Or click and watch the following video. <https://www.youtube.com/watch?v=wwlgq97ob8>

Use the “Save As” to save your document you will need to save the document as an “Excel Workbook” not a CSV file. You can change that when you do the Save As function.

Once you completed these steps, you will see names in Column B & C or you will see an #N/A.

If there is a name in Column B they are terminated members that are also members. (Go the terminated member and change the e-mail address to “duplicate@none.com)

If there is a name in Column C they are prospects that are also members. (Go to the prospect and delete. *They are already members and you will no longer need to interact with them as a prospect).

Additional Helpful Advice.

To keep up with the process once you have no duplicates make sure to:

- When a member comes back, make sure to convert the terminated profile in Fitware.
- When a member joins, make sure to convert the prospect to a sale in Fitware.

Additionally:

- When member’s sign up online an account in Fitware is created for that member as well as a Prospect Engager profile with the ‘Enquiry’ status. These online sign ups should be switched to the “Sale” status on their

Prospect Engager profile. The only Prospects that should have an “Enquiry” status are Prospects that have yet to be contacted by the club.

- If a Prospect has been contacted and a sale was not completed the Prospect’s status should be updated to “Not Interested.”

