

Membership Staff: Posting New Member Transactions in POS

Instructions for posting start up fees including Enrollment, Discounts, Fitness Consultation and Pro-Rated Dues for a joining member.

1. Enter Snooze Account # under Member Information

- Anchorage – 099999
- Fairbanks – F999999
- **Juneau – JV9999**

The screenshot shows the 'Member Information' screen in the POS system. At the top, there are buttons for 'Find Member', 'Clear Member', and 'Logout'. The 'Search' section contains fields for 'Account No.' (JV9999), 'Last Name' (Snooze), and 'First Name' (Juneau). Below these, it displays 'Account No: JV9999', 'Status: Inactive', and 'Relationship: Main'. To the right is a photo of a retail store and the text 'Mr. Juneau Snooze' and '997 - Charge Only'. Further right, a 'Balances' section shows 'Current: (\$4,4', '30 Days: \$0.0', '60 Days: \$0.0', '90 Days: \$0.0', and 'Total: (\$4,4'. Below this, it shows 'Credit Limit: \$0.0' and 'CTA: Not Allow'. At the bottom, there is a grid of colored buttons: 'Child Care' (green), 'MESSAGE' (green), 'CPR' (red), 'Toiletries' (cyan), 'Drinks' (yellow), 'Replace ID' (pink), 'Guest Fees' (green), 'Tanning' (green), 'Pro Shop' (cyan), and 'MEMBERSHIP' (blue). The page is labeled 'Page 1 of 2'.

2. Click on the MEMBERSHIP key to Access the Membership Quick Keys.

The screenshot shows the 'MEMBERSHIP' quick keys screen. It features a grid of buttons: 'ENROLLMENT FEES' (yellow), 'ENROLLMENT DISCOUNT' (green), 'MONTHLY DUES' (pink), 'FITNESS CONSULTATION' (cyan), and 'NON-TAX' (red). There are also empty buttons in the grid. The page is labeled 'Page 1 of 1'.

3. Click on ENROLLMENT FEES, then select the Membership Type for your member.

- M2M Note: If a No Commitment Membership DO NOT post full enrollment and a discount. Instead, you will highlight the Enrollment Fee and Edit the price to the Net amount due for Enrollment then skip instruction #4 (Examples: If No Commitment Offer Enrollment is \$20 edit the price of a Gold Fitness Family from \$299 to \$20. If Enrollment offer is \$ then DO NOT POST any enrollment and go directly to Instruction #5 to post dues.)

The screenshot shows the 'ENROLLMENT FEES' screen. It features a grid of buttons for different membership types: 'GOLD FAMILY' (yellow), 'GOLD COUPLE' (yellow), 'GOLD INDIVIDUAL' (yellow), 'GOLD JR. ENROLLMENT' (yellow), 'USCG Gold Family' (pink), 'USCG Gold Couple' (pink), and 'USCG Gold Individual' (pink). There are also empty buttons in the grid. The page is labeled 'Page 1 of 1'.

4. Click on MEMBERSHIP again then ENROLLMENT DISCOUNT. Highlight the Discount and Click on Edit key. Change the price to match the sales offer discount.

Item Code	Description	Salesperson	Quantity	Price	Amount
1177	J - Gold Family Enrollment		1	\$299.00	\$299.00
1182	J - Enrollment Discount		1	\$0.00	\$0.00

Line Items

Edit	Discount
Prorate	Refund
Install	Delete

Transaction

Comment	POA	No Tax
Clear Screen	No Sale	Print Last
Tip-Out	Invoice Refund	

Payments

Subtotal:	\$299.00
Sales Tax / Service:	\$14.95
Payment on Account:	\$0.00
Invoice Total:	\$313.95

cs) Edit Data Line

Description: J - Enrollment Discount

Salesperson:

Quantity: 1

Price: 279.00

OK Cancel Manager

5. Click on MEMBERSHIP then MONTHLY DUES. Select the Membership Type for your member.

- If No Commitment Membership: Be sure to use the membership types to the Right side described as M2M.

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MONTHLY DUES							
Gold Family	Gold Tennis Family	UCGG Gold Tennis Family		M2M Gold Family	M2M Gold Tennis Family		
Gold Couple	Gold Tennis Couple	USCG Gold Tennis Couple		M2M Gold Couple	M2M Gold Tennis Couple		
Gold Individual	Gold Tennis Individual	USCG Gold Tennis Individual		M2M Gold Individual	M2M Gold Tennis Individual		
Gold Junior	Gold Tennis Junior			M2M Gold Junior			

- Highlight the Dues and Click on the Edit key. Change the price to match the Pro-Rated Dues owed at joining.

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Child Care	MASSAGE	CPR	Toiletries	Drinks	DVD	Tennis	Food
Replace ID	Guest Fees	Tanning	Pro Shop	MEMBERSHIP	Racquetball	Racquet Repair	Special Program

Item Code	Description	Salesperson	Quantity	Price	Amount
1177	J - Gold Family Enrollment		1	\$299.00	\$299.00
1182	J - Enrollment Discount		1	\$279.00	(\$279.00)
1103	J - Gold Fitness Family		1	\$170.00	\$170.00

Line Items

Edit	Discount
Prorate	Refund
Install	Delete

Transaction

Comment	POA	No Tax
Clear Screen	No Sale	Print Last
Tip-Out	Invoice Refund	

Payments

Subtotal:	\$190.00
Sales Tax / Service:	\$9.50
Payment on Account:	\$0.00
Invoice Total:	\$199.50

- In Example below the price has been edited for a membership signed up on the 15th owing for 15-30th of the month.

- If sold between the 22-31 of the month, and full next month dues also owed at joining go back into MEMBERSHIP/MONTHLY DUES and add a second dues charge for a full month dues unedited.

6. Click on FITNESS CONSULTATION then click OK when the Series Sale Item Entry window appears.

7. At this point the New Member's Enrollment, Discount (if not M2M), Fitness Consultation and Dues owed at joining should all be listed showing an Invoice Total matching your membership agreement.

Item Code	Description	Salesperson	Quantity	Price	Amount
1177	J - Gold Family Enrollment		1	\$299.00	\$299.00
1182	J - Enrollment Discount		1	\$279.00	(\$279.00)
1103	J - Gold Fitness Family		1	\$85.00	\$85.00
JFTC001	Fitness Consultation		1	\$30.00	\$30.00

Line Items Edit Discount Prorate Refund Install Delete	Transaction Comment POA No Tax Clear Screen No Sale Print Last Tip-Out Invoice Refund	Payments	Subtotal: \$135.00 Sales Tax / Service: \$6.75 Payment on Account: <u>\$0.00</u> Invoice Total: \$141.75
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8. **Optional Advanced Payment Collection:** If the member wishes to also pay in advance for future months (Example: member wants to pay 1 year in advance), **DO NOT** post additional dues, instead you will apply a POA- Payment on Account for whatever the member wishes to pay in advance. Simply press the **POA** key and enter the amount of the advance payment.

- The POA amount will then be reflected on the bottom right of the invoice and will be included in the total due.

Item Code	Description	Salesperson	Quantity	Price	Amount
1177	J - Gold Family Enrollment		1	\$299.00	\$299.00
1182	J - Enrollment Discount		1	\$279.00	(\$279.00)
1103	J - Gold Fitness Family		1	\$85.00	\$85.00
JFTC001	Fitness Consultation		1	\$30.00	\$30.00

Line Items

Edit
Discount
Prorate
Refund
Install
Delete

Transaction

Comment
POA
No Tax
Clear Screen
No Sale
Print Last
Tip-Out
Invoice Refund

Payments

Subtotal: \$135.00
Sales Tax / Service: \$6.75
Payment on Account: \$1,955.00
Invoice Total: \$2,096.75

9. Click on the Comment key and enter the following information:

- Main Member's First and Last Name
- Membership Offer
- Membership Type Abbreviated (Examples 2012-GFI/2014-GFF/2013-GFC/etc)
- Your Initials
- Notes regarding any fees owed at joining but NOT COLLECTED (Example: If your manager has approved the FC Fee or Pro-Rated dues be added the members first billing include a note "Please bill FC Fee" and skip #6 or "Please bill Pro-Rated Dues" and skip #5.

cs Comment

Comment
Sam Johnson October Offer 2014-GFF ejs

OK
Cancel

10. Click on Payments key then select the appropriate payment type

- DO NOT** select FORCED CHARGE. If are not collecting anything from the member at joining follow instructions for a New Member \$0 payment.
- Alternatively, if a \$0 Enrollment offer with \$0 dues owed at joining and FC Fee waived or deferred to the first billing you should still complete steps 1 & 2 posting the Enrollment and Discount leaving the Amount Due \$0. Since no payment needs to be collected you can simply press Print Receipt to complete the transaction.

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\$1.00
\$5.00
\$10.00
\$20.00
\$50.00
\$100.00
CTA
XFer

CASH
CHECK
MC /VISA and DISC
AMEX
GIFT CARD
FORCED CHARGE

Payment Type
Payment Amount

Payment Options

Delete
Comment
Reverse
Back

Print Receipt

Subtotal: \$135.00
Sales Tax / Service: \$6.75
Payment on Account: \$1,955.00
Invoice Total: \$2,096.75
Payment Total: \$0.00
Amount Due: \$2,096.75

DO NOT use the Line Items Discount key (bottom left of POS screen) to discount any new member transaction. Always use the appropriate quick keys and edit the price as needed 😊

On the rare occasion that we do have a member eligible to sign up under a Non-Taxed membership there are quick keys set up for Enrollment – Discount – Dues – Fitness Consultation under the RED **Non-TAX** quick key to the far left under **MEMBERSHIP**.

[illegible]