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Members Overview

Member's Module allows for the control and maintenance of all membership contracts with some of the following tasks:

- Updating of personal Information
- Cancellations
- Suspensions/time stops
- Upgrading/downgrading
- Change of payment details for direct debit payments
- View financial history
- View membership visits
- Perform bulk suspensions and bonus days application
- Perform price updates
- Apply internal messages, SMS and email individually or in bulk
- Direct access to Consult Module if purchased and installed

Viewing Customer Contracts

Home screen> Members> Contracts> View Customer Contracts

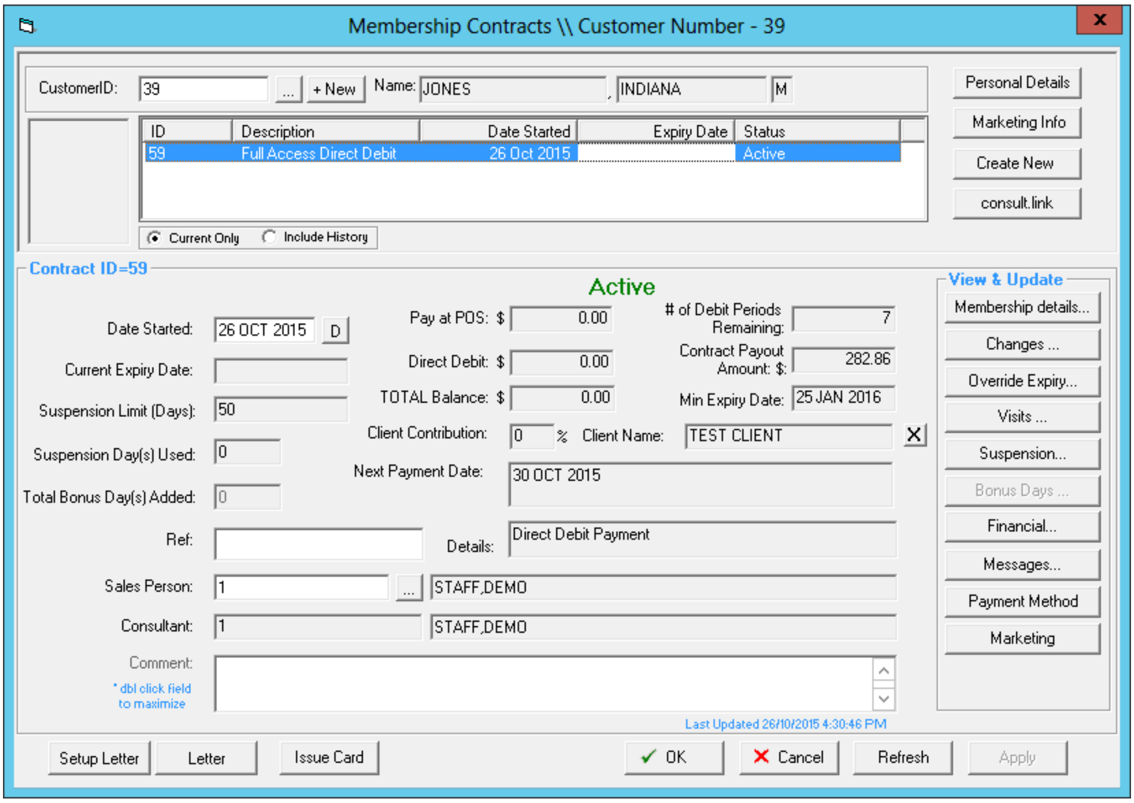
This screen allows you to view all relevant details of a particular member (including their contract and financial history).

To begin, you will need to search for a member as the View Customer Contracts screen will appear blank.

Search for the member by either:

a) Typing their Customer ID or surname and hitting enter
b) Scan their card
c) Selecting the […] button

Once you find a member the following can now be viewed. This screen includes status of the membership contract (active/expired/suspended), start date and current expiry date.



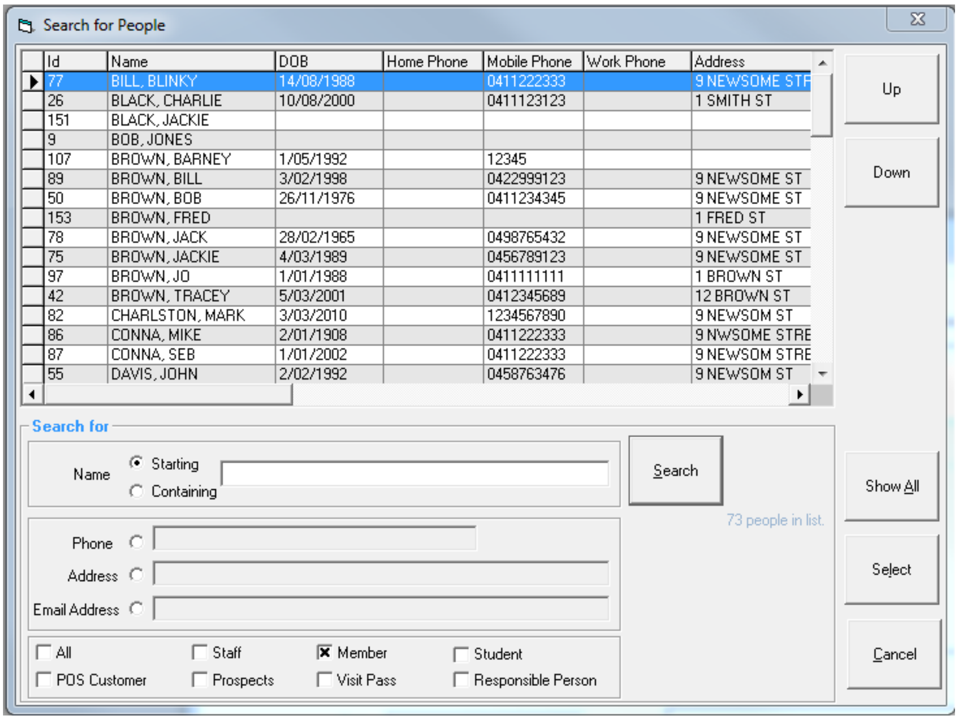
- **Customer ID -** The identification number specific to the member
- **Date Started -** The date the membership contract started
- **Current Expiry Date -** This is when the membership is due to expire. Memberships that are direct debit and ongoing will not have an expiry date (unless they have a hard expiry date). For more information on hard and soft expiry dates and setting these, please see the Admin User Guide.
- **Suspension Limit (Days) -** This is the maximum number of days that the customer can suspend their membership for
- **Suspension Day(s) Used -** How many suspension days have already been used for the current suspension period

- **Total Bonus Day(s) Added -** Indicates total of any bonus days that have been added to the membership contract.
  Note: this is only applicable to upfront membership contracts.
- **Ref -** Reference information that was entered upon the sale of the membership contract
- **Sales Person -** Identifies the sales person linked to the sale of this membership contract. This can be changed provided the user has appropriate access
- **Consultant -** The name of staff member who processed the sale of the membership contract through POS
- **Comments -** Any relevant comments relating to the member
- **Pay at POS: $ -** Will show any credit or money owing that needs to be taken via POS
- **Direct Debit: $ -** Will show any credit or money owing that is to be collected through direct debit
- **Total Balances: $ -** This is the total amount outstanding or in credit via both payment methods
- **# of Debit Periods Remaining -** This is the number of remaining debit periods if you have a minimum term set up against the direct debit Membership Type
- **Contract Payout Amount -** This is the amount remaining on a minimum term direct debit membership contract. this will total the amount the member would need to pay if leaving earlier than the minimum term required
- **Min Expiry Date -** This is the date that the member can cancel if a minimum term has been set against the direct debit Membership Type
- **Client Contribution -** If a client/company is contributing to this member's membership contract, this is the percentage that the client/company will be contributing towards it
  Note: this only applies to Corporate Membership Types.
- **Client Name -** The name of the client/company that the member is attached to for their Corporate Membership. The cross [X] will remove this client from the membership contract. Any discount or contribution which was being received will also be removed
- **Next Payment Date -** This is the date of the next scheduled direct debit run and if no direct debit details have been provided, it will state "Unknown: Debit Type needs to be defined". If the member has an upfront membership this area will remain blank
- **Details -** Will inform you if this is a direct debit membership and this area will be blank for an upfront membership
- **[Personal Details] -** Takes you to the Customer screen, where you can view and modify the member's personal details
- **[Marketing Info] -** Will bring you to the Customer Marketing screen, this will show you any relevant marketing information that has been filled in for this member
- **[Create New] -** Will create a new membership contract for this member. You will be taken to the New Membership Contract screen
- **[Consult.link] -** Will bring you to this member's Consult screen if this has been activated for your site. For more information please see the Consult User Guide
- **[Membership details…] -** Will show you the membership details for the current membership contract
- **[Changes…] -** Displays a change log of all changes that have been made to this membership contract
- **[Override Expiry…] -** This is where you can enter an expiry/cancellation date or modify an existing expiry date
- **[Visits…] -** Will show you the visit history for the current membership contract

- **[Suspension…] -** Allows you to add and cancel suspensions for this membership contract
- **[Bonus Days…] -** This is where you can add bonus days to the membership contract, this extends the length of the contract
- **[Financial…] -** Will show you financial information for this member, from payments made, account adjustments and direct debit overrides
- **[Messages] -** Is where you can view or create new messages for this member
- **[Payment Method] -** This is where you enter or alter a member's credit card or bank details for direct debit memberships
- **[Marketing] -** Will take you to the Customer Contract Marketing screen. Here you can view or record how the member joined
- **[Setup Letter] -** Allows you to set up a letter template for members. This letter is set up in Admin Module. For more information please see the Admin User Guide.
- **[Letter] -** Select the letter button to produce a letter for this customer using the template selected above
- **[Issue Card] -** Will allow you to print a Links card for the member. This is not a pre printed card and must be previously setup in the Admin Module. For more information regarding the setting up or Links cards, please see the Admin User Guide.

How to find a Member

1. Enter member's surname or customer ID into the 'CustomerID; field. Alternatively, click on the [...] button to activate the Search for People screen



If using the Search for People screen use one of the five search options below to find your member:

- **Starting -** This is the start of their surname, either in full or part of
- **Containing -** This can be first name or a few letters within a name

- **Phone -** This can be their home, work or mobile number or part of
- **Address -** This can be their whole address or part of
- **Email Address -** This can be their whole email address or part of

2. Once you have found the member, double click on their name to select

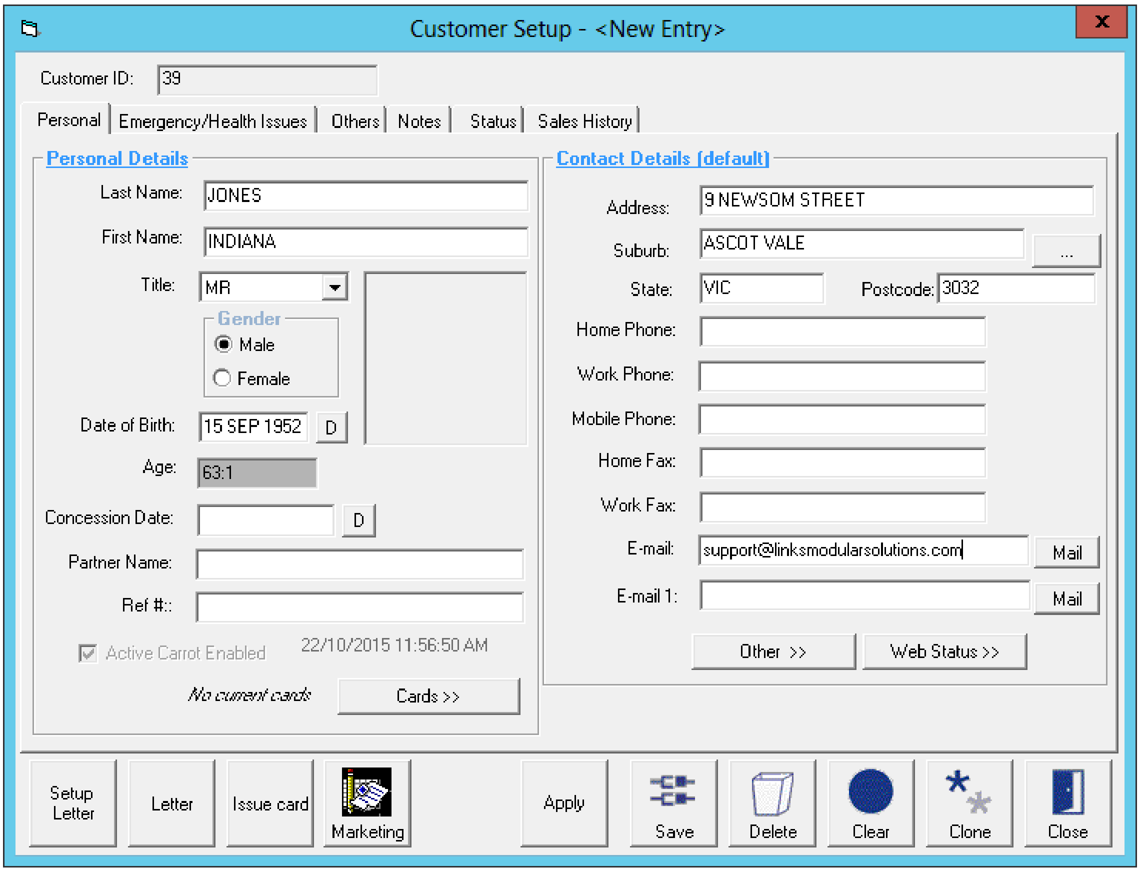
Membership Maintenance

Personal Details

Members> Contracts> View Customer Contracts> Personal Details

The [Personal Details] button will open up the Customer screen and allow you to view and edit the member's personal and contact details along with allocating or removing pre printed cards. This avoids having to open the Customer screen through the POS Module.

For more information and an overview of the Customer screen please see the POS User Guide.

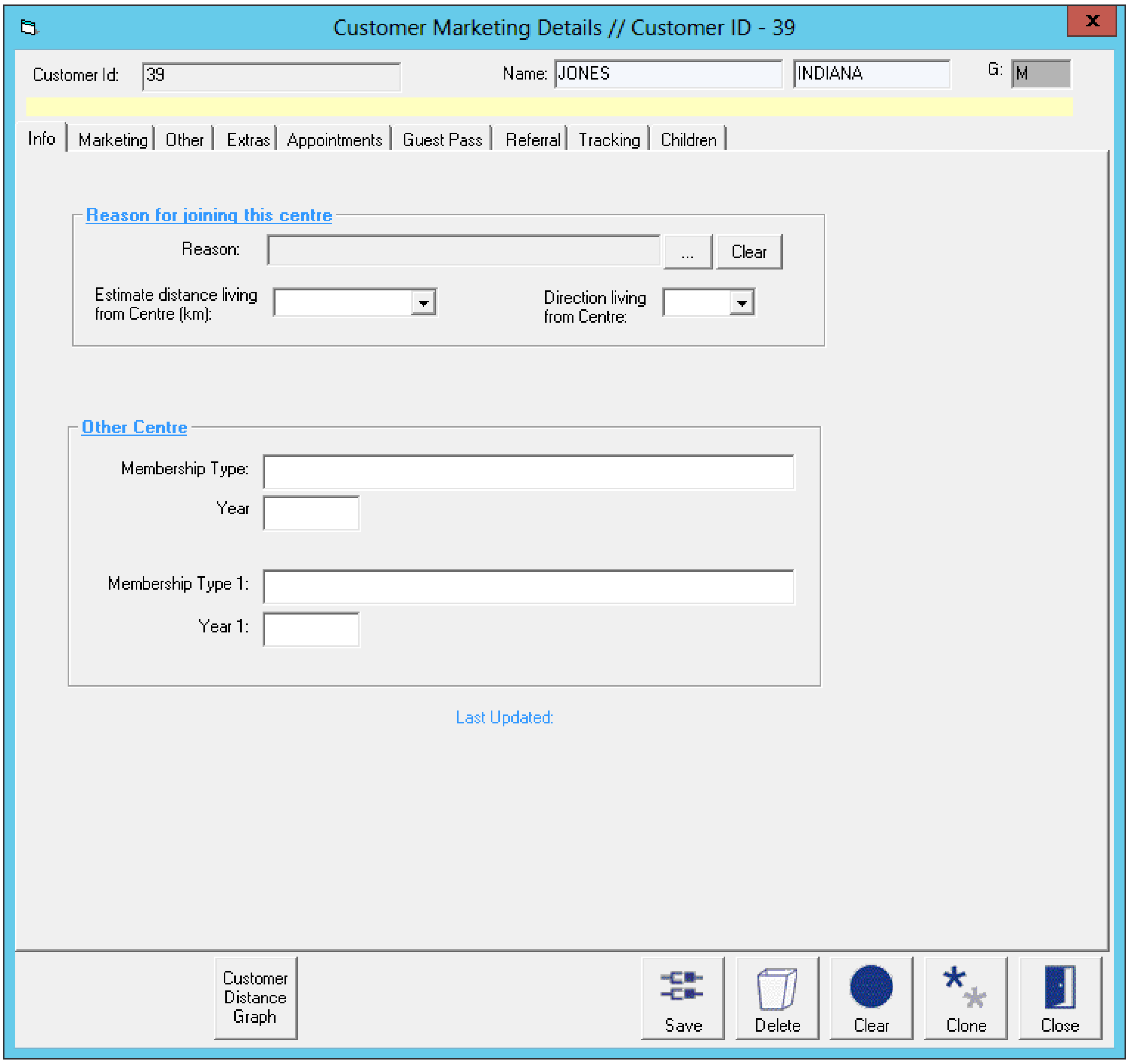


Marketing Info

Members> Contracts> View Customer Contracts> Marketing Info

The [Marketing Info] button can be used for a number of items, from why the customer joined, to how far they live from the centre and record any correspondence with the member via the Tracking tab.

For more information and an overview of the Customer Marketing Details screen please refer to the POS User Guide and the Members Retention section of this User Guide.



Create New

Members> Contracts> View Customer Contracts> Create New

The [Create New] button allows you to create a new membership contract from the Members Module.

This is usually used by membership sales staff or management. This can be used to setup a membership contract so when the member attends they then pay for the membership on first attendance rather than at time of creation or if a member is upgrading/downgrading their membership contract.

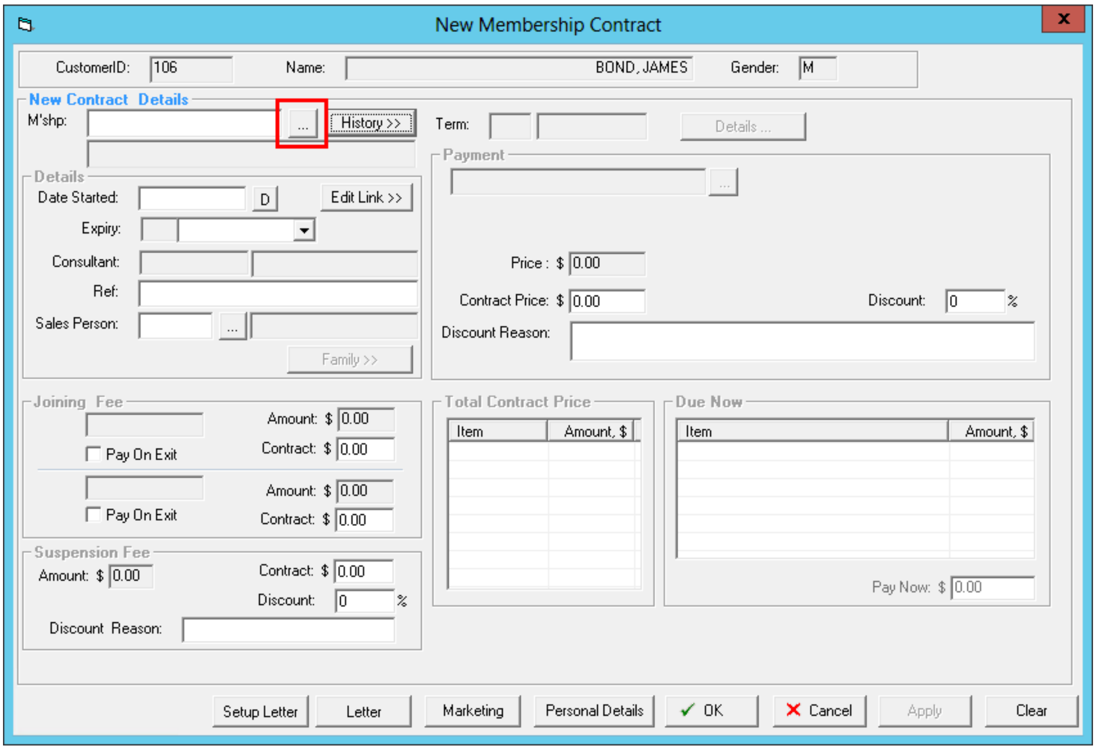
Note: Membership contracts should primarily be sold through POS. Only those staff authorised to should add 'back of house' memberships via the Members Module.

Creating a New Direct Debit Membership from the Members Module

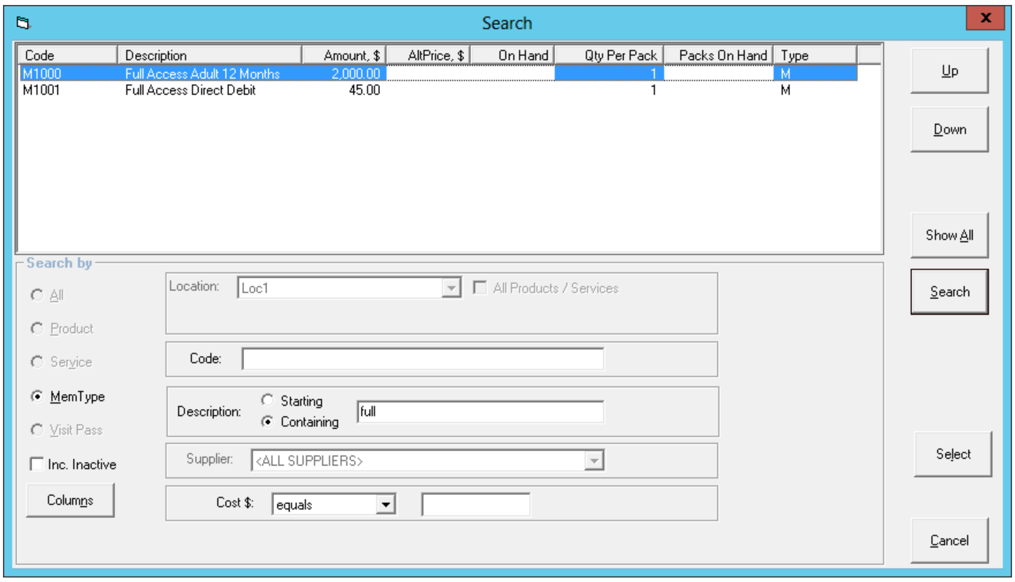
1. Go to Members> Contracts> View Customer Contracts
2. Search for the member by either:
    a. Typing their Customer ID or surname and hitting enter

b. Scan their card
c. Selecting the […] button
d. Alternatively, you can add a new member by clicking on [+New]

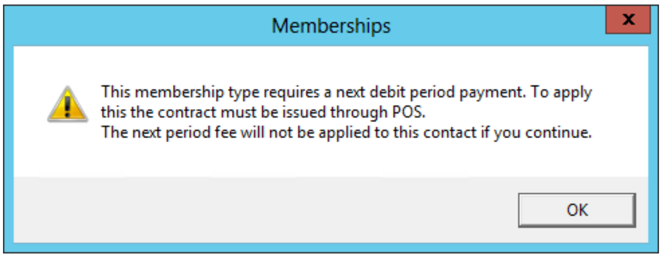
3. Once you have the customer's details in the Membership Contracts screen, select the [Create New] button and the New Membership Contract screen will appear
4. Select the […] button next to 'M'shp'



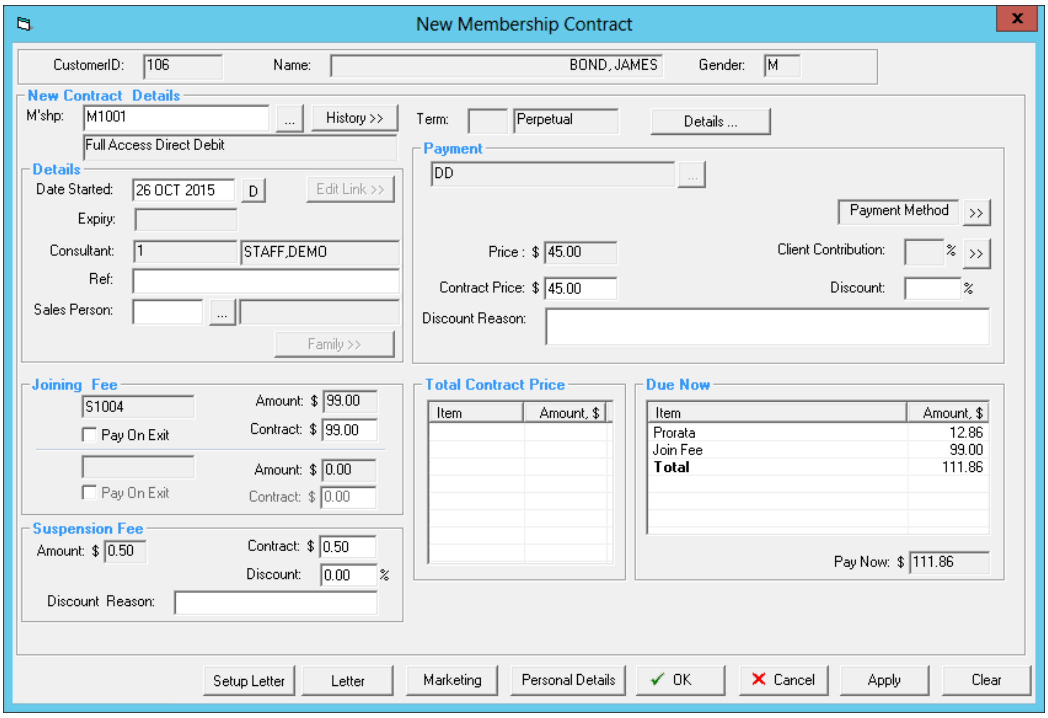
5. Search for the Membership Type you wish to allocate to this member and select the membership by double clicking on it or clicking the [Select] button



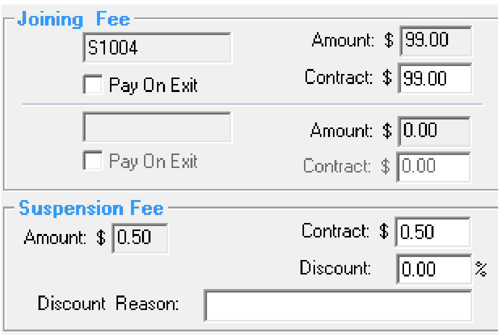
6. As this membership type is direct debit you will have a warning that any pro rata will be applied but if you also wish to collect the next payment you will need to sell this membership through POS
7. Select [OK] to continue



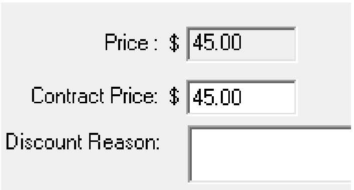
8. The details of the selected membership will now auto fill the relevant fields in the New Membership Contract screen



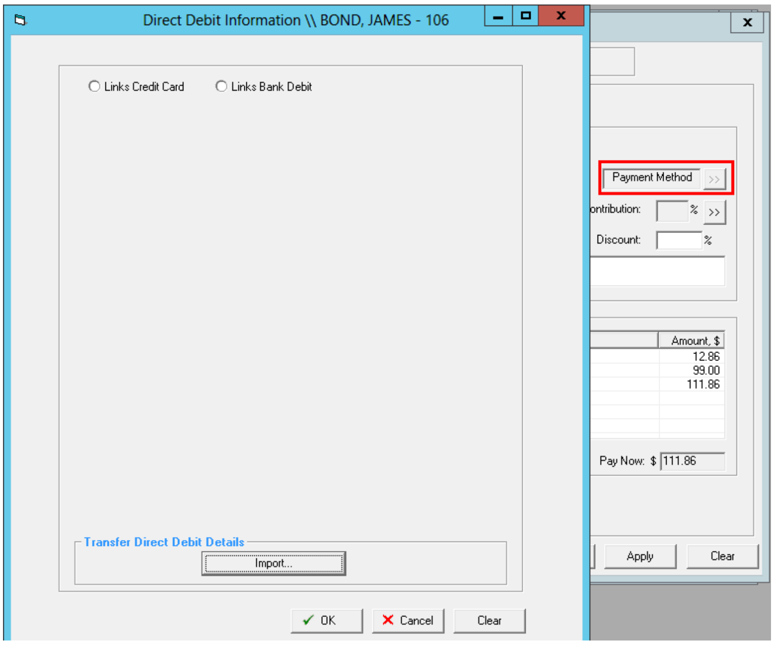
9. Check you have selected the correct customer
10. Check you have selected the right membership type
11. Check the 'Date Started' is correct, enter in a 'Ref' if required and also a sales person ID if relevant
12. Check the 'Joining fee' and 'Suspension fee' and update as applicable



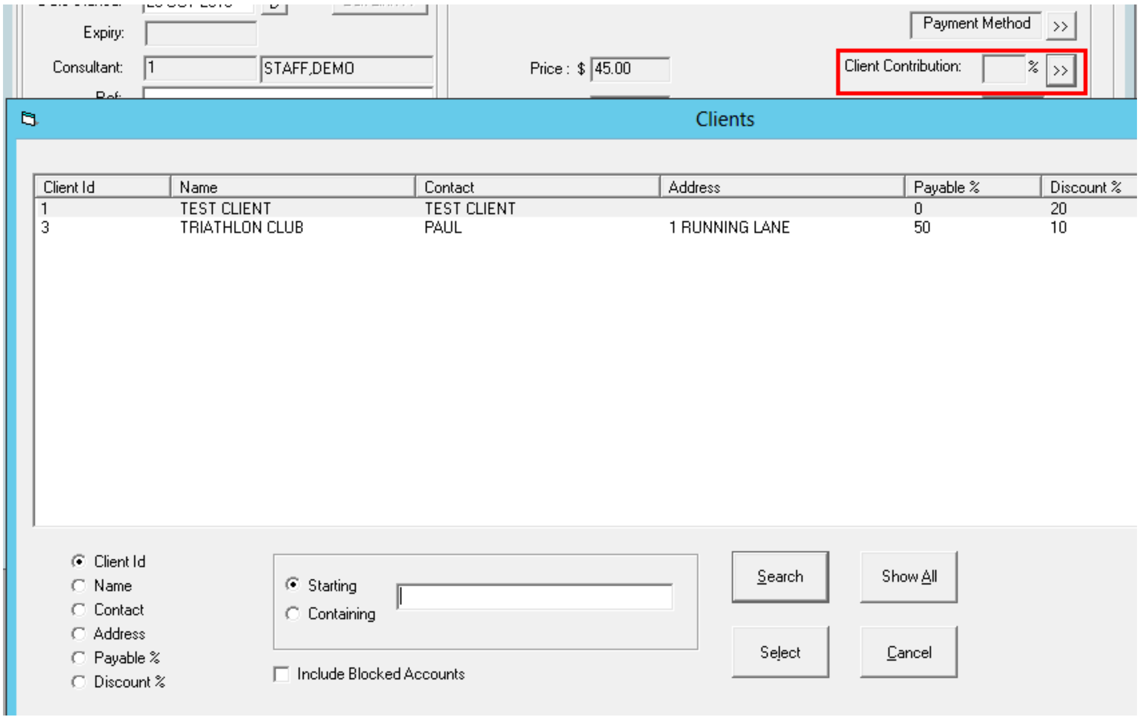
13. Check the 'Contract Price' and apply any discounts as relevant
    Note: This is the member's ongoing debit amount. This is not the pro rata due for today. Do not $0.00 out unless this customer is never going to pay for this membership contract.



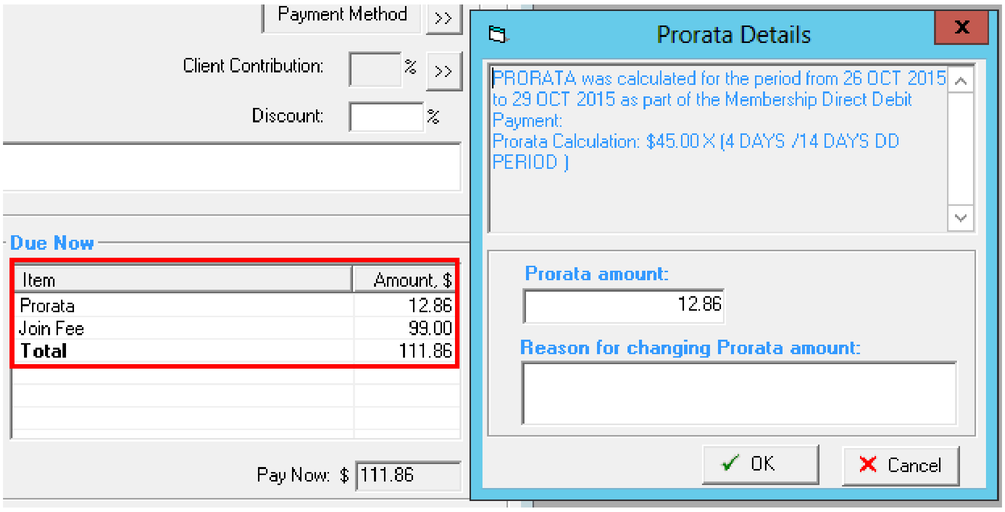
14. Enter in a payment method by selecting the [>>] button next to 'Payment Method' if applicable. This is the bank or credit card details the regular direct debit payments will be deducted from



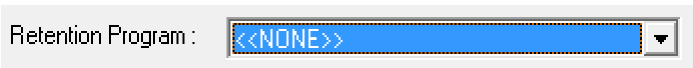
15. If this membership is for a Corporate Membership Type select [>>] button next to 'Client Contribution' and add the relevant client for this membership. Any discount for this corporate group will be automatically applied



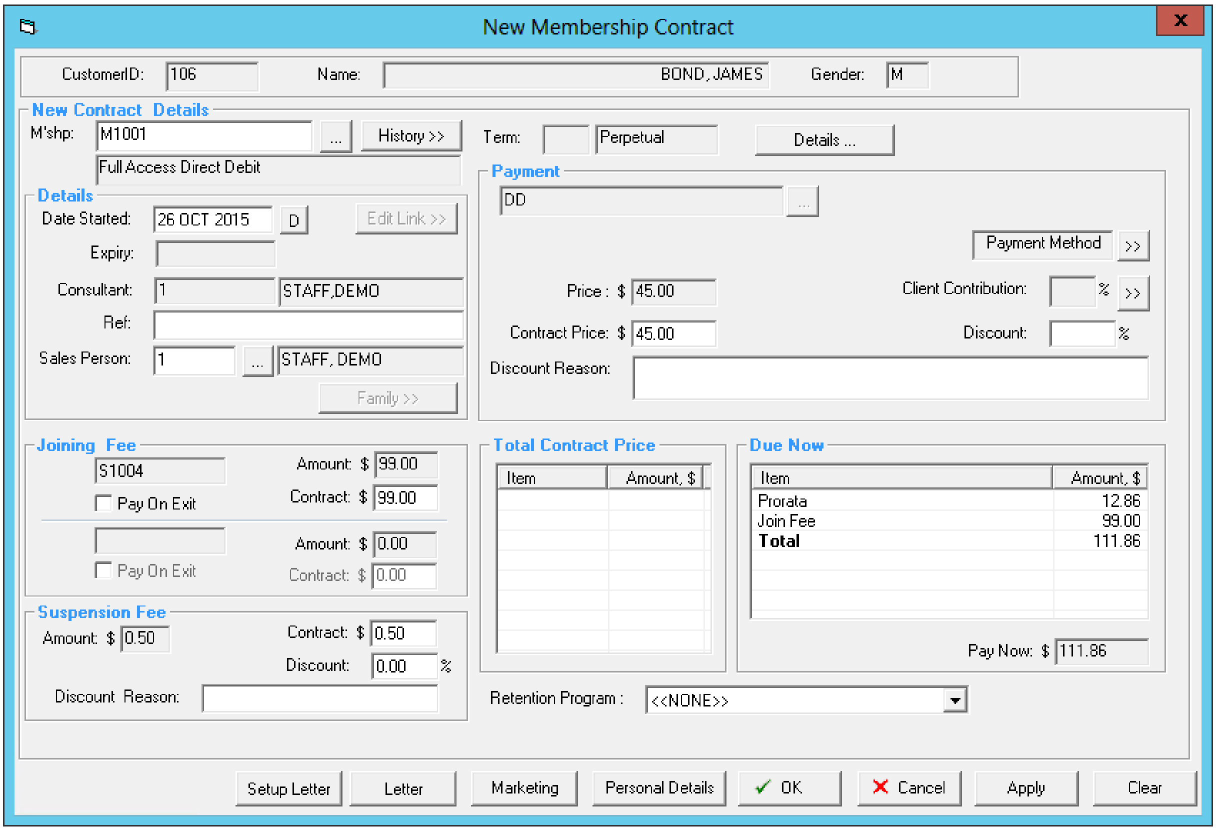
16. Double click on the word 'Prorata' within the 'Due Now' section to check the pro rata calculation or alter if required. To alter, type in a new amount into the 'Prorata amount' field and enter a reason for change in the fields shown below



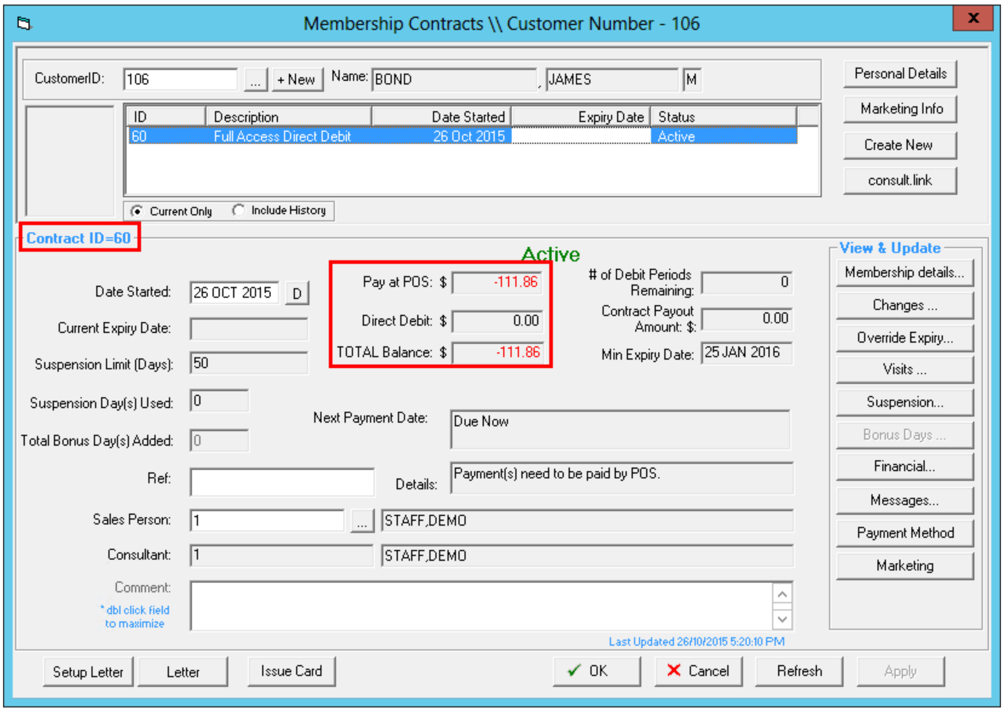
17. If your centre runsh a Retention Program select the program this member will go on from the drop down menu



18. Once you have checked over the contract and made any changes as required select [OK] to finalise the membership



19. The new membership details now appear with the membership contract number
20. Any pro rata will be displayed to pay at POS and the 'Next Payment Date' will display 'Due Now' if the member has joined after the cutoff point in the lead up time to the next Direct Debit run and therefore cannot be included in that run

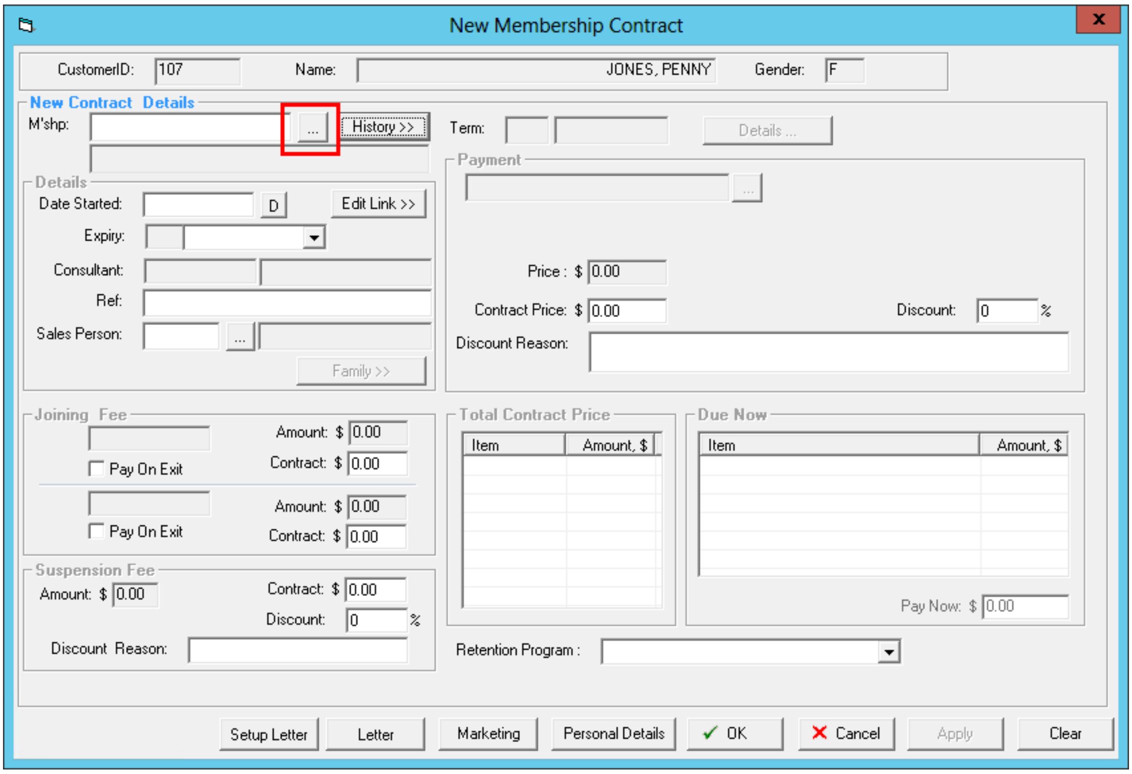


21. This payment will now need to be taken through POS

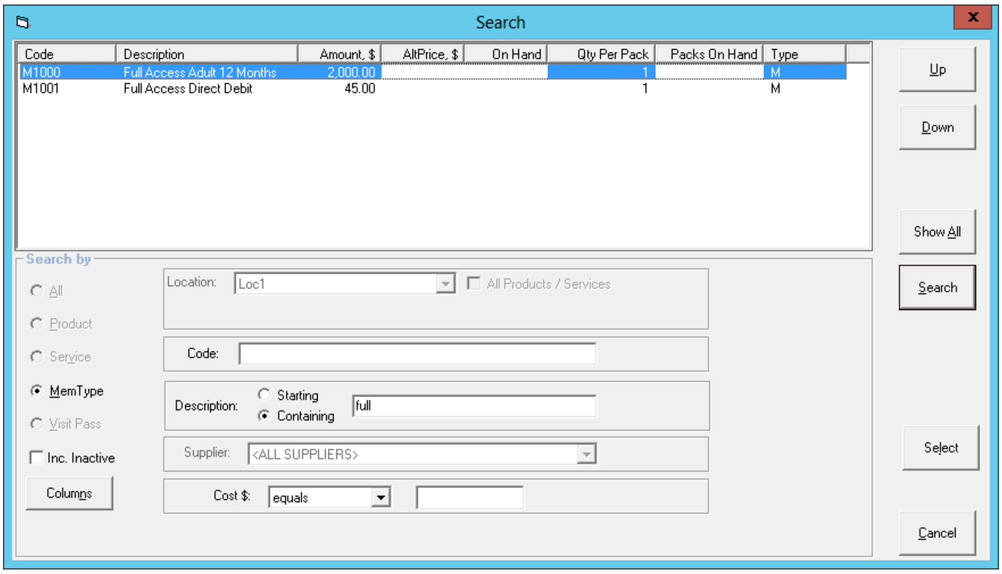
Creating a New Up Front Membership from the Membership Module

1. From the View Customer Contracts screen
2. Search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
    d. Alternatively, you can add a new member by clicking on [+New]

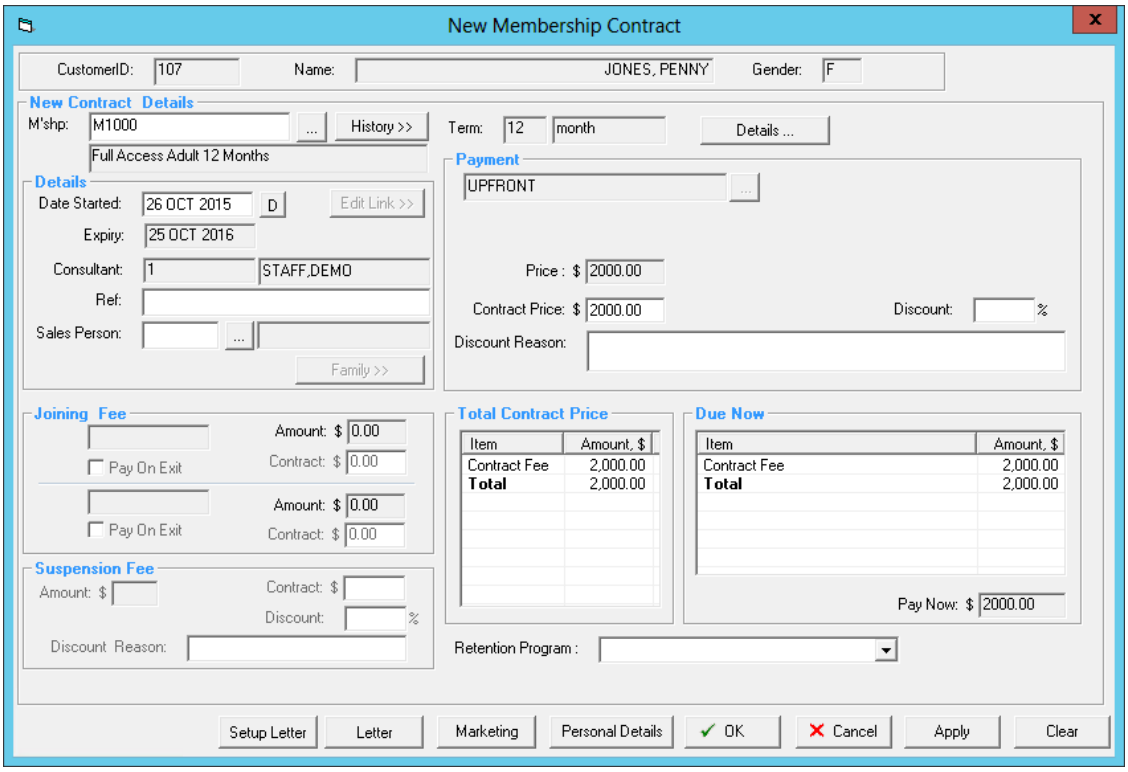
3. Once you have the Customer's details in the Membership Contracts screen, select the [Create New] button and the New Membership Contract screen will appear



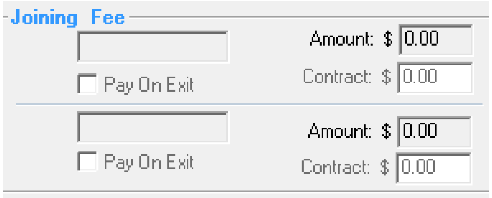
4. Select the [...] button next to 'M'shp'
5. Search for the Membership Type you wish to allocate to this member and select the membership by double clicking on it or clicking the [Select] button



6. The details of the selected membership will now auto fill the relevant fields in the New Membership Contract screen



7. Check you have selected the correct customer
8. Check you have selected the right membership type
9. Check the 'Date Started' is correct, enter in a 'Ref' if required and also a sales person ID if relevant
10. Check the 'Joining Fee' and 'Suspension Fee' and update as applicable

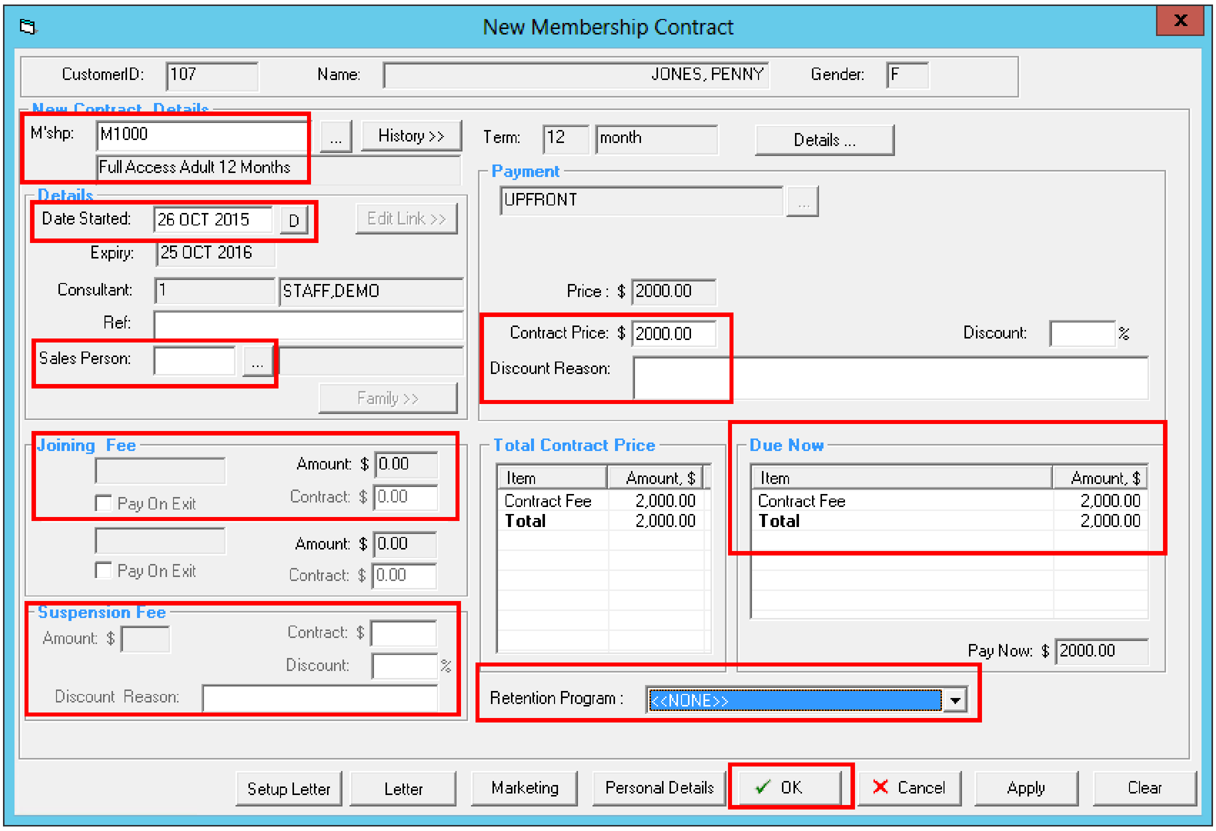


11. Check the 'Contract Price' and apply any discounts as relevant

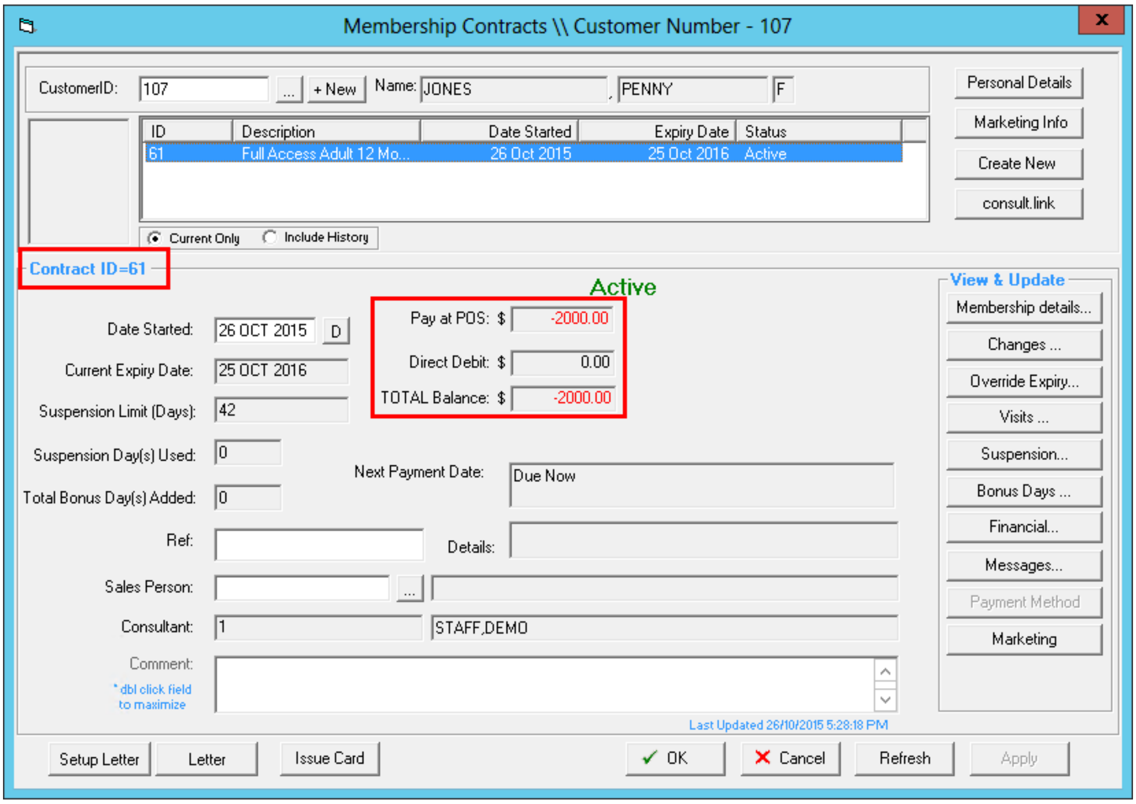
12. Check 'Due Now' this will show you the contract fee and any joining fees adjust as applicable

13. If your centre runs a 'Retention Program' select the program this member will go on from the dropdown box

14. Once you have checked over the contract and made any changes as required select [OK] to finalise the membership



15. The new membership details now appear with the membership contract number and any outstanding money



16. This payment will need to be taken through POS

Consult.link

Members> Contracts> View Customer Contracts> Consult.link

The Consult Module is a stand-alone application that works with the Links database. Consult is an additional module that can be purchased if you don't already have it.

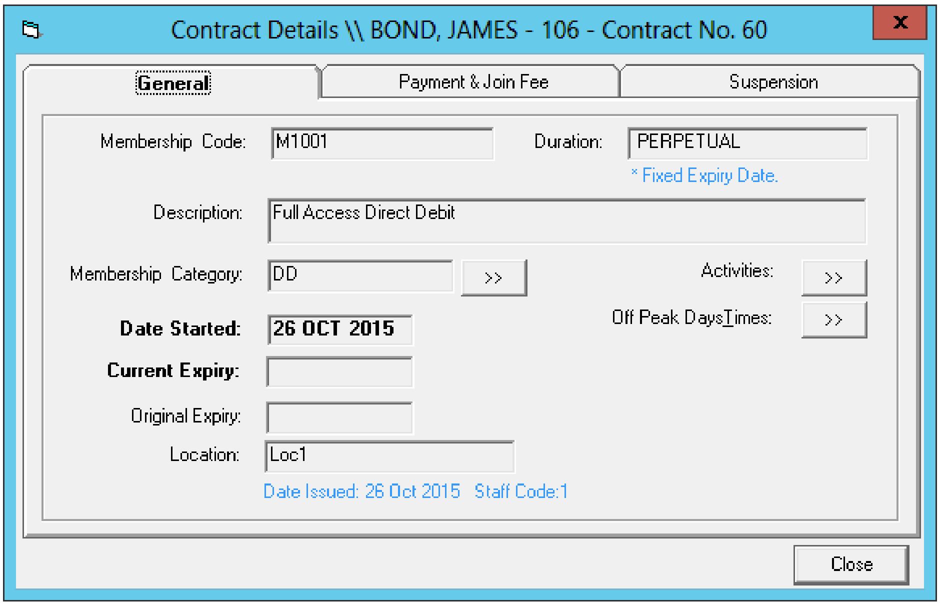
Consult is designed to capture data from the health consultation appointment process and can then be used for individual comparisons; for example, you can track a member's weight loss or alike. The data can also be reviewed holistically for a complete view of your centre's health club customer progress.

For more information and an overview of the Consult Module please see the Consult User Guide.

Membership Details

Members> Contracts> View Customer Contracts> Membership Details

The Membership details will show you details for the current membership. If the Customer has more than one contract you will need to ensure you select the membership that you wish to view the details of before selecting the [Membership Details] button.



General Tab

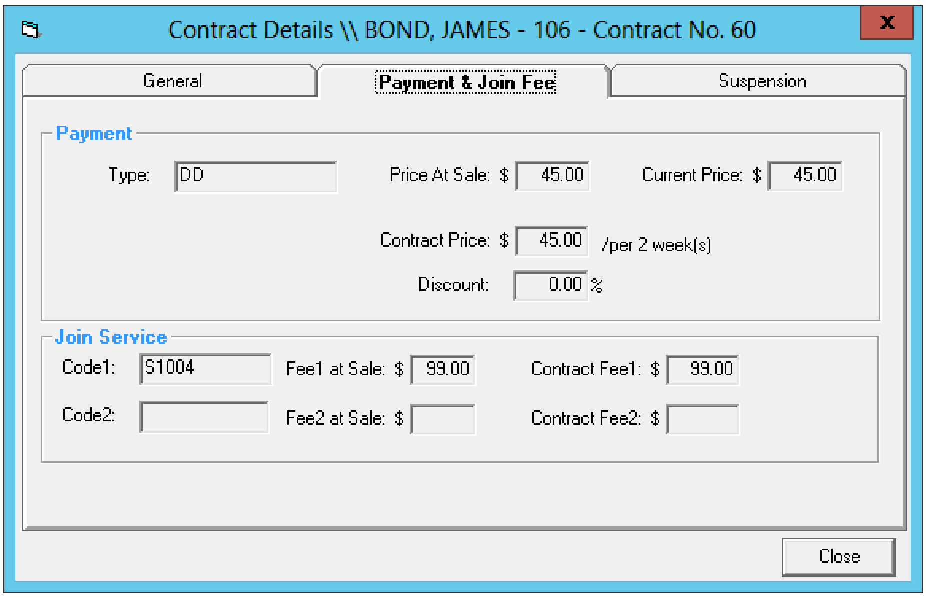
This tab displays the terms of the Customer's current contract

- **Membership Code** - Is the 'Membership Code' for the membership type
- **Duration** - The length of this membership, if it is upfront or perpetual
- **Description** - The name of the membership
- **Membership Category** - The category the membership falls under. By selecting [>>] will display further details of the membership including payment mode and status. See the 'Admin User Guide' for further information on 'Membership Categories'

- **Date Started** - The date the contract started
- **Current Expiry** - The current expiry date. Perpetual memberships do not have a set expiry date
- **Original Expiry** - If this membership had an expiry date, i.e. a 6 month membership this date will show here
- **Location** - Will show the location where the membership was purchased (for Multi/Location databases ONLY)
- **Activities** - Selecting the [>>] button will show any activities that have been allowed for this membership. See the Admin User Guide for further information on activities
- **Off Peak Days Times** – Selecting the [>>] button will show if there are any time restrictions for this membership. See the Admin User Guide for further information on membership times

Payment & Join Fee Tab

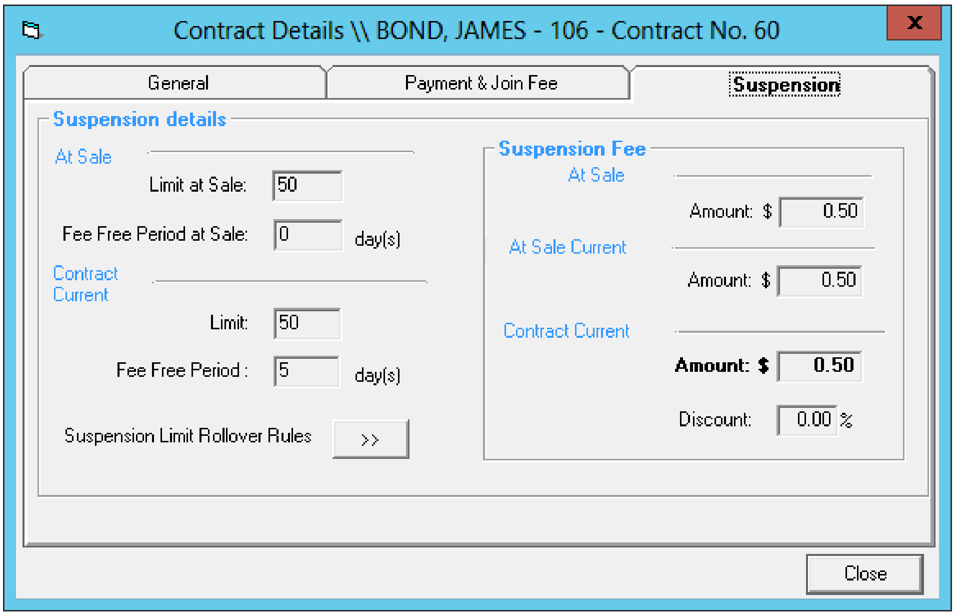
This tab details the payment mode for the membership being viewed, the price at which it was sold, the current price of the membership and if the Customer was charged a joining fee.



- **Type** – If it is an upfront or direct debit membership type
- **Price at Sale** – The price this contract was sold at
- **Current Price** – Is the price of the membership currently
- **Contract Price** – This is the amount this Member is currently paying
- **Discount** – If this Member is receiving a discount
- **Joining Service Code 1** – The Service Code for the joining fee
- **Fee1 at sale** – The price the joining fee was when sold
- **Contract Fee1** – The joining fee that was paid when sold
- **Joining Service Code 2** – The second Service Code for an additional joining fee
- **Fee2 at sale** – The second joining fee when sold
- **Contract Fee2** – The second joining fee that was paid when sold

Suspension Tab

This tab details the limit of suspensions applicable to the membership and any suspension fee's applicable to the membership at the point of sale and/or now.



- **At sale** – The number of days that the member is allowed to suspend during their contract and the number of days for free suspension allocated
- **Current contract** – The current membership types suspension limits, free suspension days
- **Suspension Fee** – The cost per days of suspension at sale, the current cost of suspension for this Membership Type and what the Member is currently paying now and any discount amounts

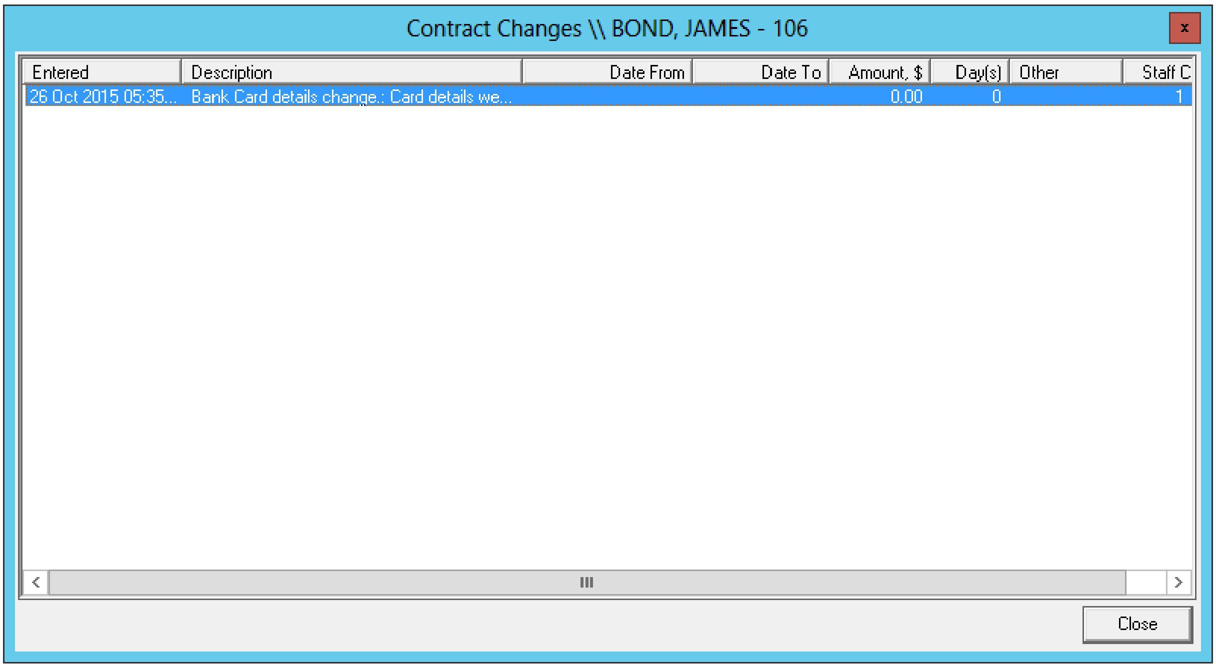
Membership Changes

Members> Contracts> View Customer Contracts> Changes

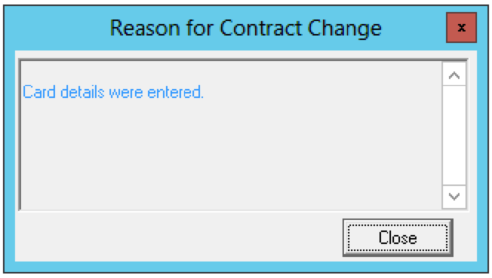
You can view any changes that have been made to a customer's membership contract. This includes discounts, changing direct debit details and applying a suspension and/or cancellation.

To view the reason for any changes made:

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the [Changes] button
3. The Contract Changes screen will show the date and time of the change, a description of the change as well as the Staff ID of the staff member that was currently logged into Links at the time of change



4. To view a reason for change double click on a change and the reason for the contract change will appear



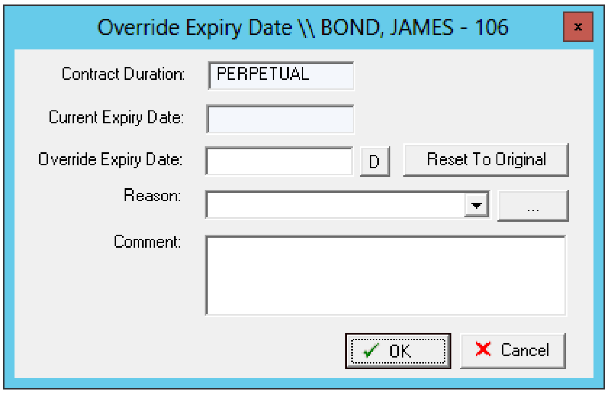
Overriding Expiry

Members> Contracts> View Customer Contracts> Override Expiry

Allows you to cancel a current direct debit member or change the current expiry date of an upfront membership.

Cancelling a Direct Debit Membership:

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Override Expiry] button

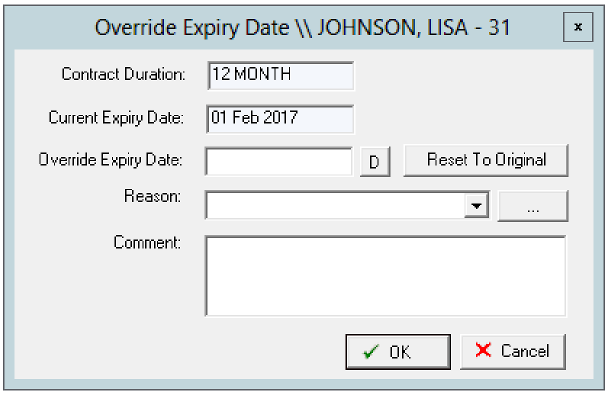


Note: In the example above, the contract is perpetual so no current expiry date exists.

3. Enter the date that the membership is to expire in the 'Override Expiry Date' box
   Note: When entering this date remember to take into account any direct debit process which may be about to occur.
4. Select a reason for the cancellation from the drop down box
5. Enter any additional comments in the 'Comment' box
6. Select [OK] to return to the previous screen; the status will display as expired once the expiry date has passed

Changing the Expiry Date of an Upfront Membership:

1. From the View Customer Contracts screen search for the member by either:
   a. Typing their Customer ID or surname and hitting enter
   b. Scan their card
   c. Selecting the [...] button
2. Select the [Override Expiry] button

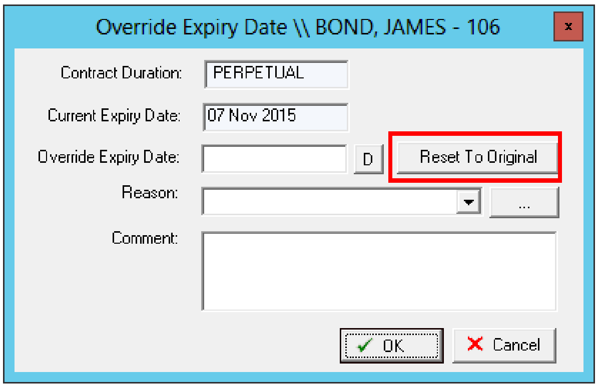


3. Enter the new date that the membership is to expire in the 'Override Expiry Date' box
4. Select a reason for the change of expiry date from the drop down box
5. Enter any additional comments in the 'Comment' box
6. Select [OK] to return to the previous screen; the status will display as expired once the expiry date has passed

Resetting an Expiry Date to the Original:

1. From the View Customer Contracts screen search for the member by either:
   a. Typing their Customer ID or surname and hitting enter
   b. Scan their card
   c. Selecting the [...] button

2. Select the [Override Expiry] button



3. Select the [Reset To Original] button and the original expiry date will be restored for the membership
   Note: If you are wanting to reset a direct debit membership and the last direct debit has already been run you will not be able to reset to original you will need to sell them a new contract. Please see the 'Create New' section of this User Guide.
4. Select [OK] to confirm

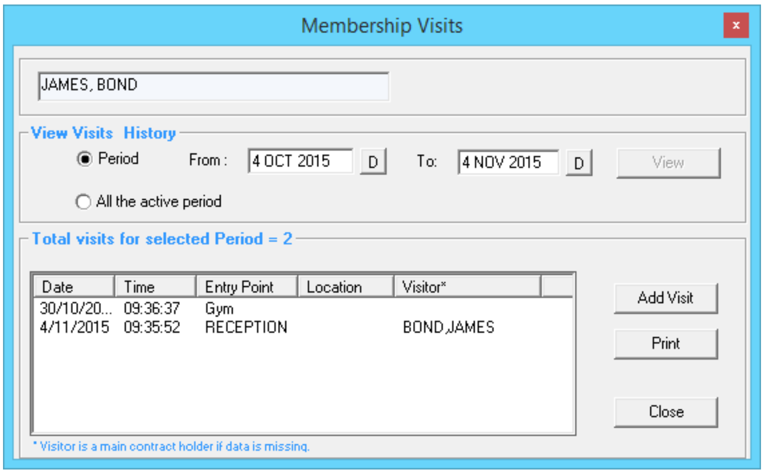
Visits

Members> Contracts> View Customer Contracts> Visits

Allows you to view, add, remove and print all visits that the member has had recorded against the selected membership contract.

Viewing Visits Made by a Member:

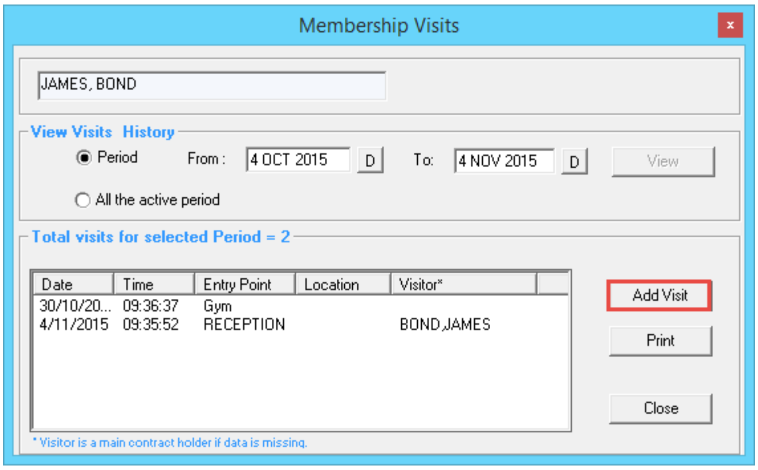
1. From the View Customer Contracts screen search for the member by either:
   a. Typing their Customer ID or surname and hitting enter
   b. Scan their card
   c. Selecting the [...] button
2. Select the [Visits] button



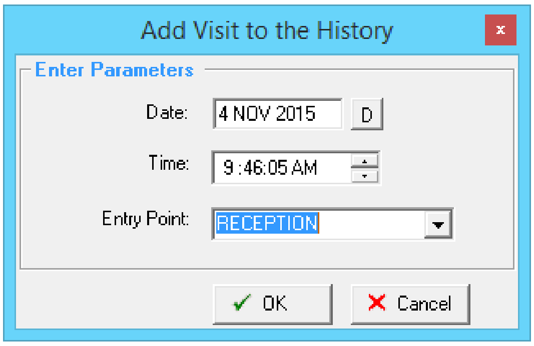
3. Select if you wish to see all visits over the 'active period' or during a specific date range. If selecting a specific period, enter the from and to dates and select the [View] button
4. Any visits made during the selection will now be displayed

Recording a Manual Visit for a Member:

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Visits] button
3. Select the [Add Visit] button

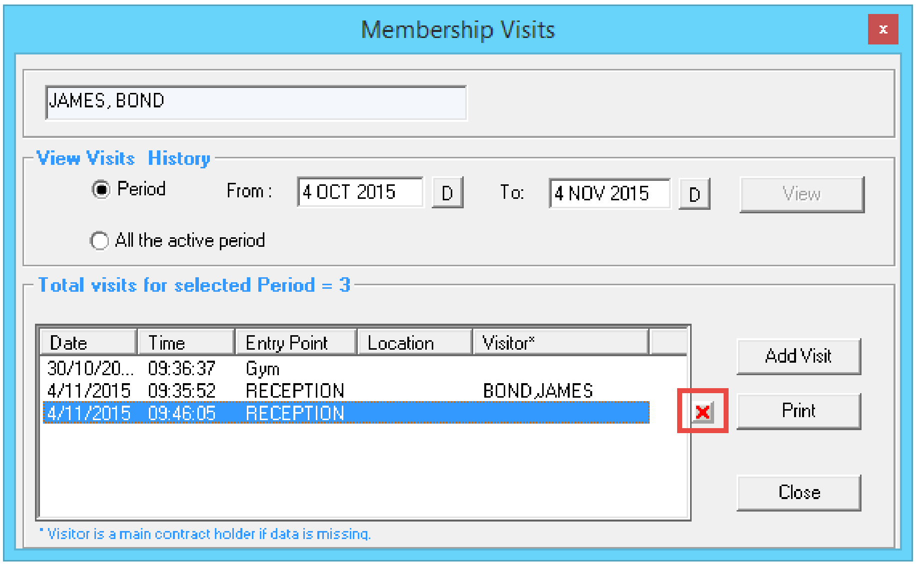


4. Enter the date, time and entry point for the visit and select [OK]

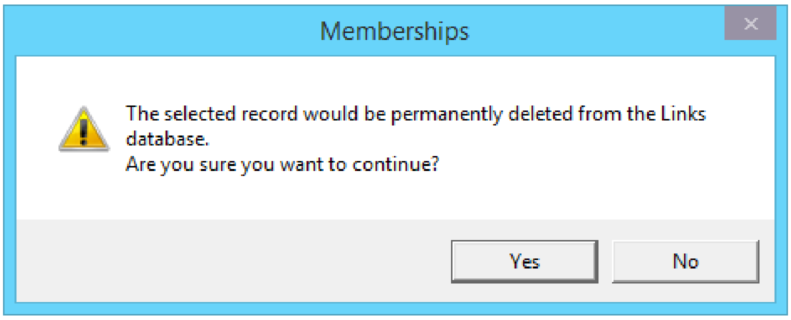


Deleting a Visit for a Member:

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Visits] button
3. Highlight the visit you wish to remove, and select the red cross which will appear on the far right hand side of the line

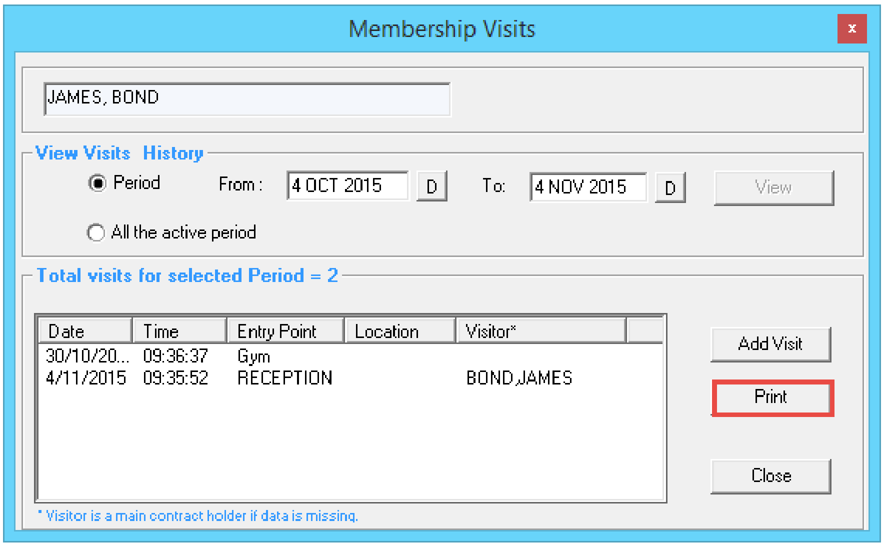


4. Say 'Yes' to the message to confirm the visit being deleted



Printing the Visit History for a Member:

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Visits] button
3. Select if you wish to see all visits over the 'active period' or during a specific date range. If selecting a specific period, enter the from and to dates and select the [View] button
4. Any visits made during the selected dates will now appear
5. Select [Print] and a document preview will be created ready for you to print



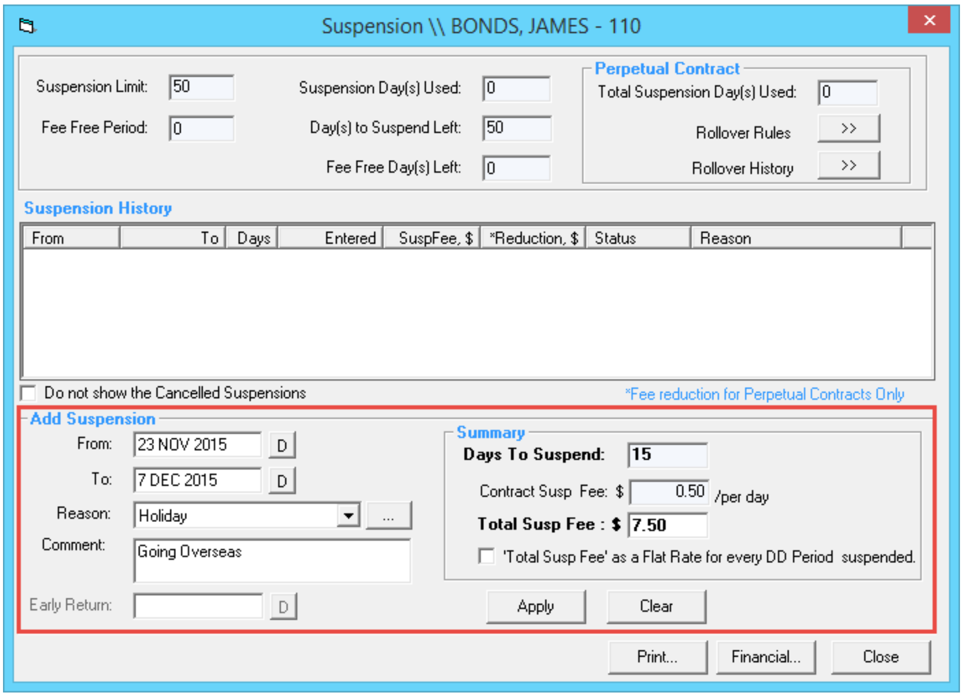
Suspension

Members> Contracts> View Customer Contracts> Suspension

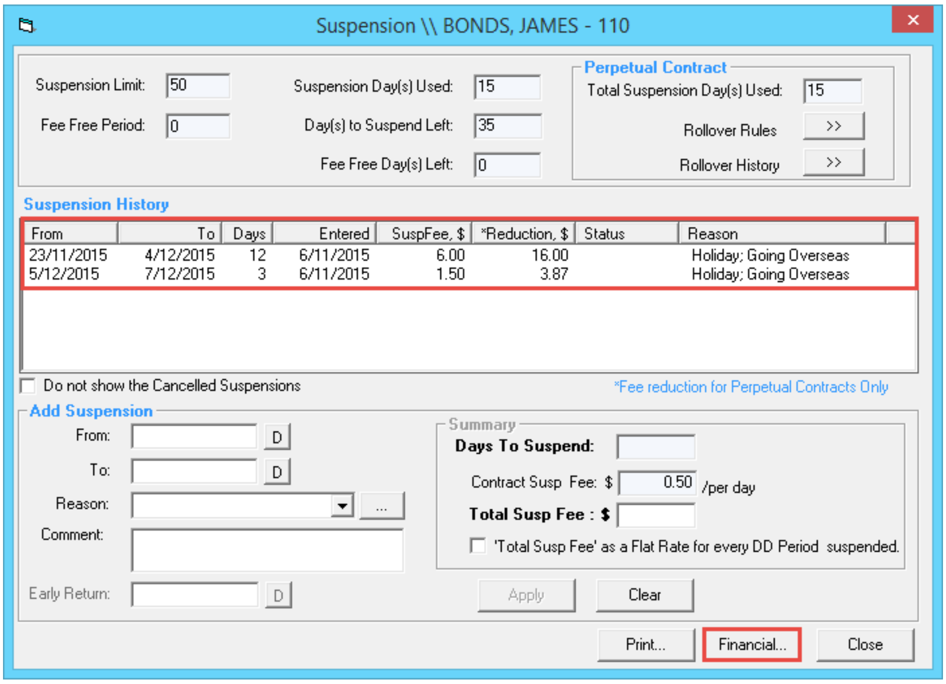
Allows you to suspend a member's membership contract and also return early from suspension if required.

Applying a Suspension

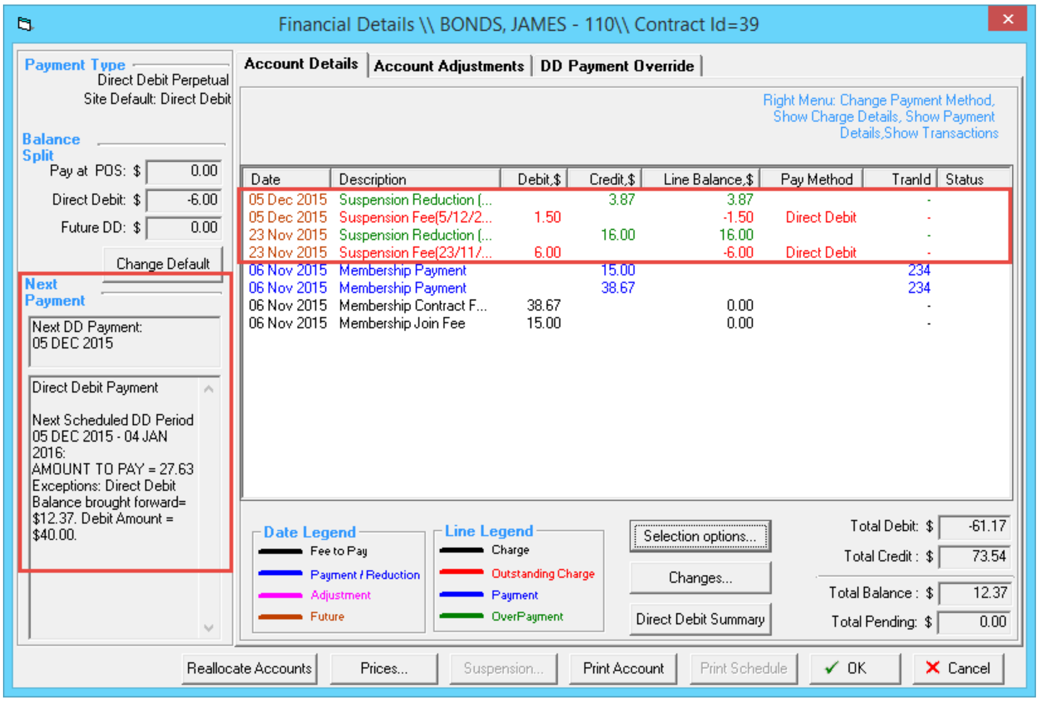
1. From the View Customer Contracts screen search for the member by either:
   a. Typing their Customer ID or surname and hitting enter
   b. Scan their card
   c. Selecting the [...] button
2. Select the [Suspension] button



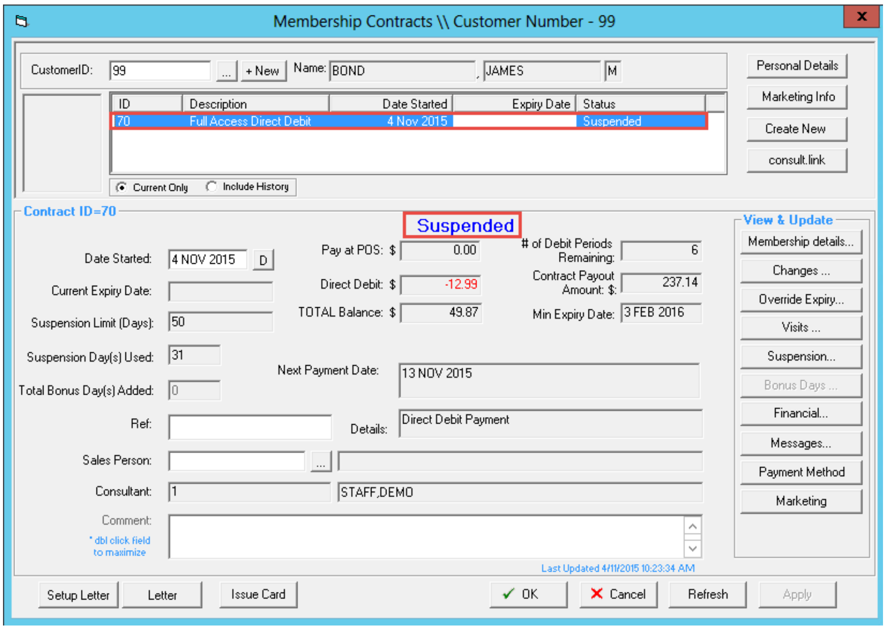
3. Insert the dates ‘From’ and ‘To’ which you wish to add the suspension for. In the example shown above, the member will be suspended for 15 days.
   Note: The from and to dates are inclusive.
4. Select a reason for the suspension from the drop down box
5. Enter any additional comments in the ‘Comment’ box
6. The ‘Summary’ section will detail the total number of days that will be suspended. If the member is charged a suspension fee you will see a total fee amount and how much it is per day
   Note. Those with the right security access can override this fee in the ‘Total Susp Fee’ box if required.
7. Select [Apply]
8. You will now see the suspension in the ‘Suspension History’, this will display in the format that is relevant to the particular membership. That is, the membership for this example is a direct debit membership on a monthly basis. The suspension falls over 2 direct debit periods so it automatically appears in the ‘Suspension History’ as a split recording. As a result 12 days of the first direct debit period, 3 days of the second direct debit period are affected by the suspension



9. Links will calculate the reduction that will also occur for the next direct debit run. Viewing the financial screen will display the pending processing results. In the screen below the ‘Next DD Payment’ is reduced and the account lines highlighted below show as future transactions in regards to the suspension.



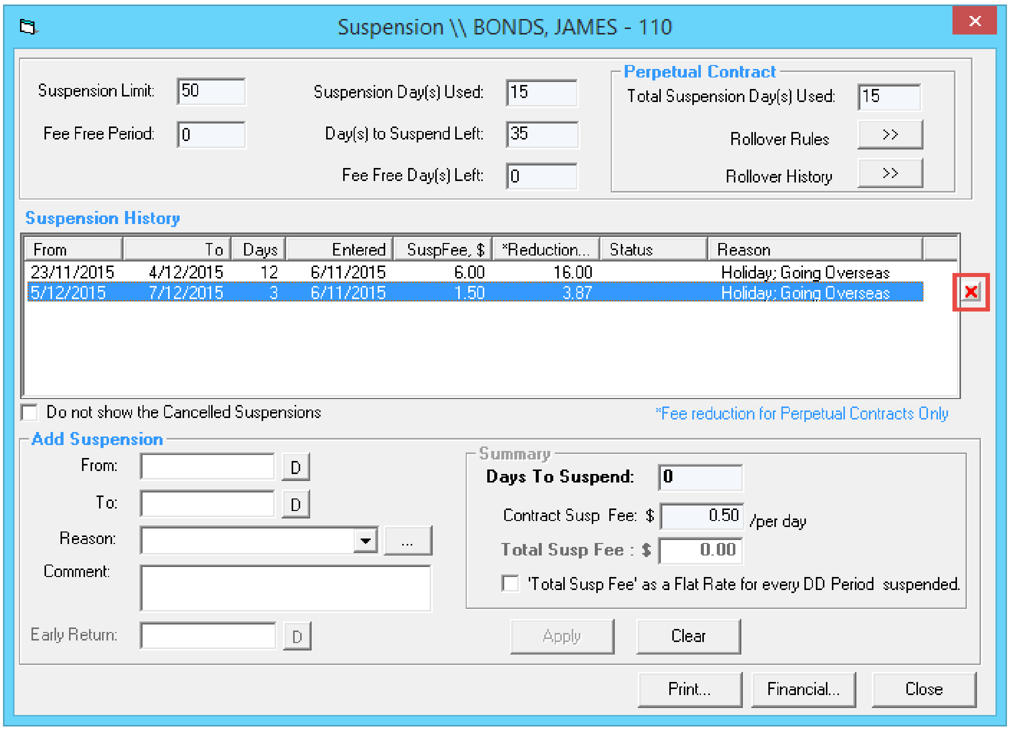
10. During the suspension period the contract will now appear as suspended in the Suspension History screen and as a suspended status on the Membership Contract screen



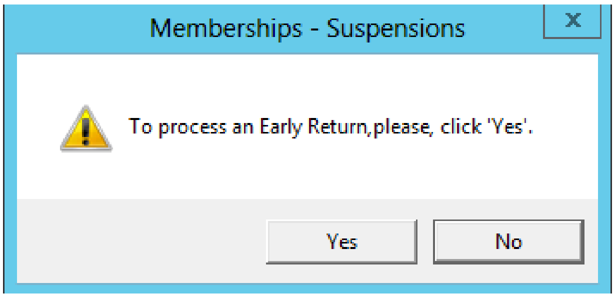
Processing an Early Return

A contract can be reactivated from suspension in the event that a member returns early from a period of absence:

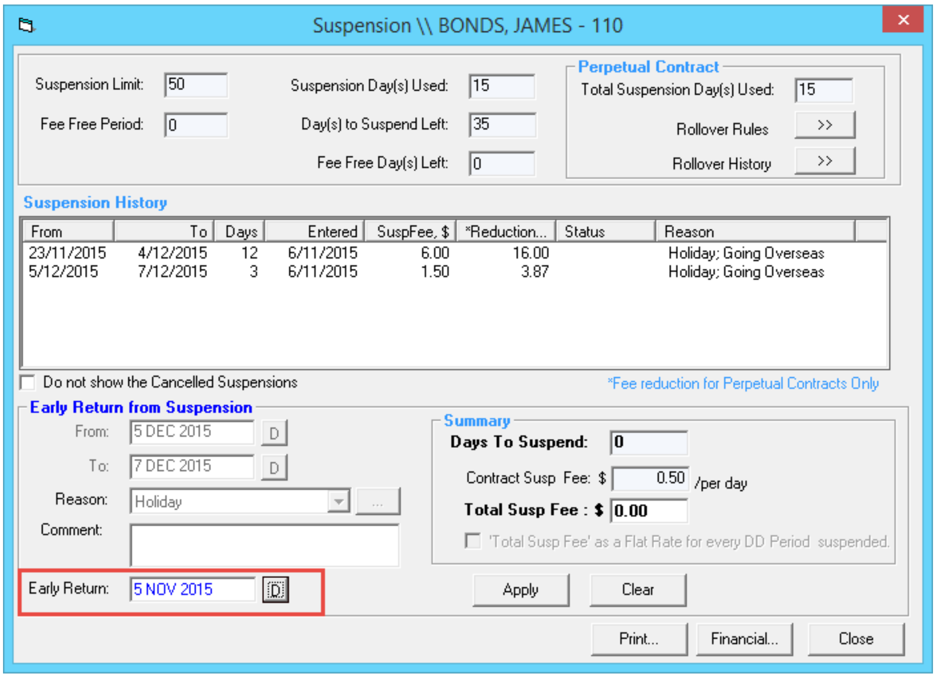
1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Suspension] button



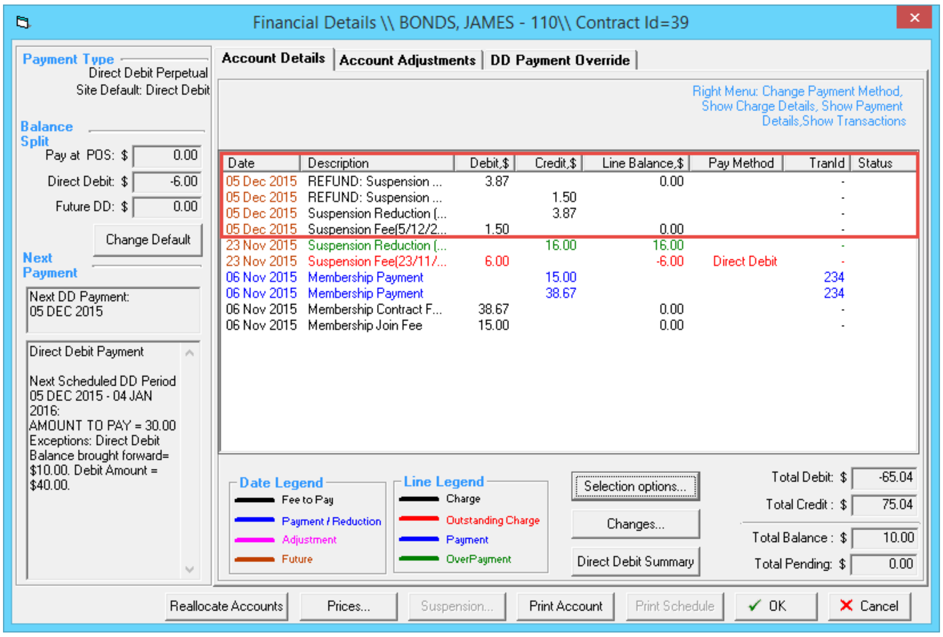
3. Select the correct debit period to be affected and click on the red cross displayed to right of the line



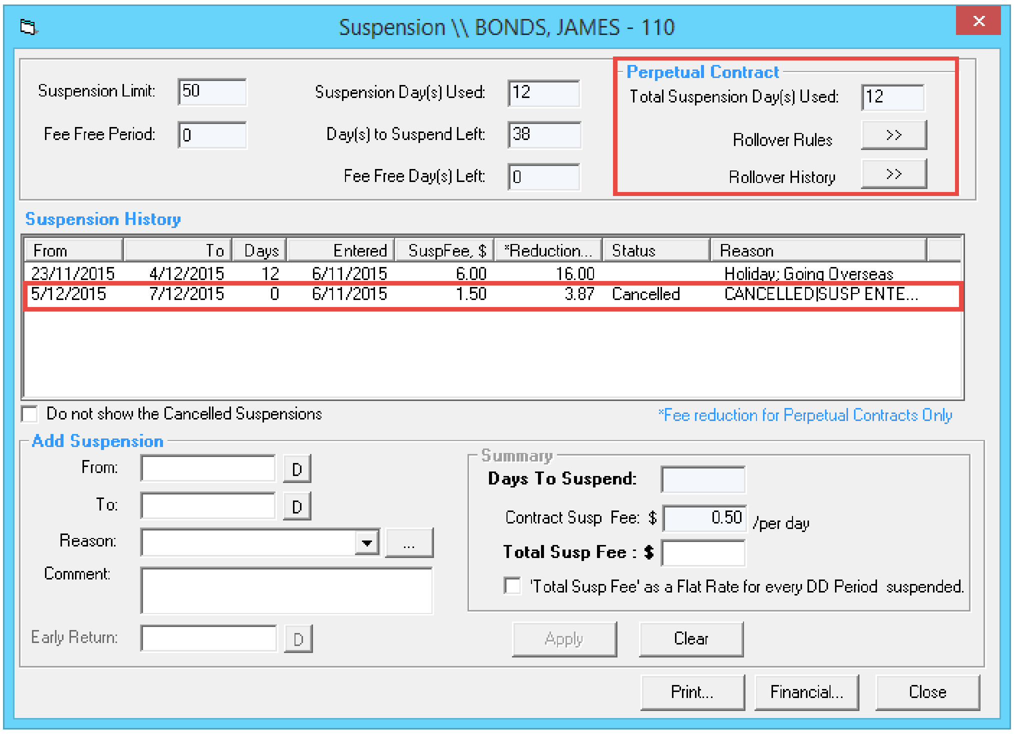
4. Select [Yes] to process an early return
5. Enter a date in the early return field



6. Select [Apply] to finalise the early return
7. The suspension limit and Financial Details screen will update accordingly



8. The record will now be restored as active if the return date has passed or the record will remain suspended but with a new suspension end period in place

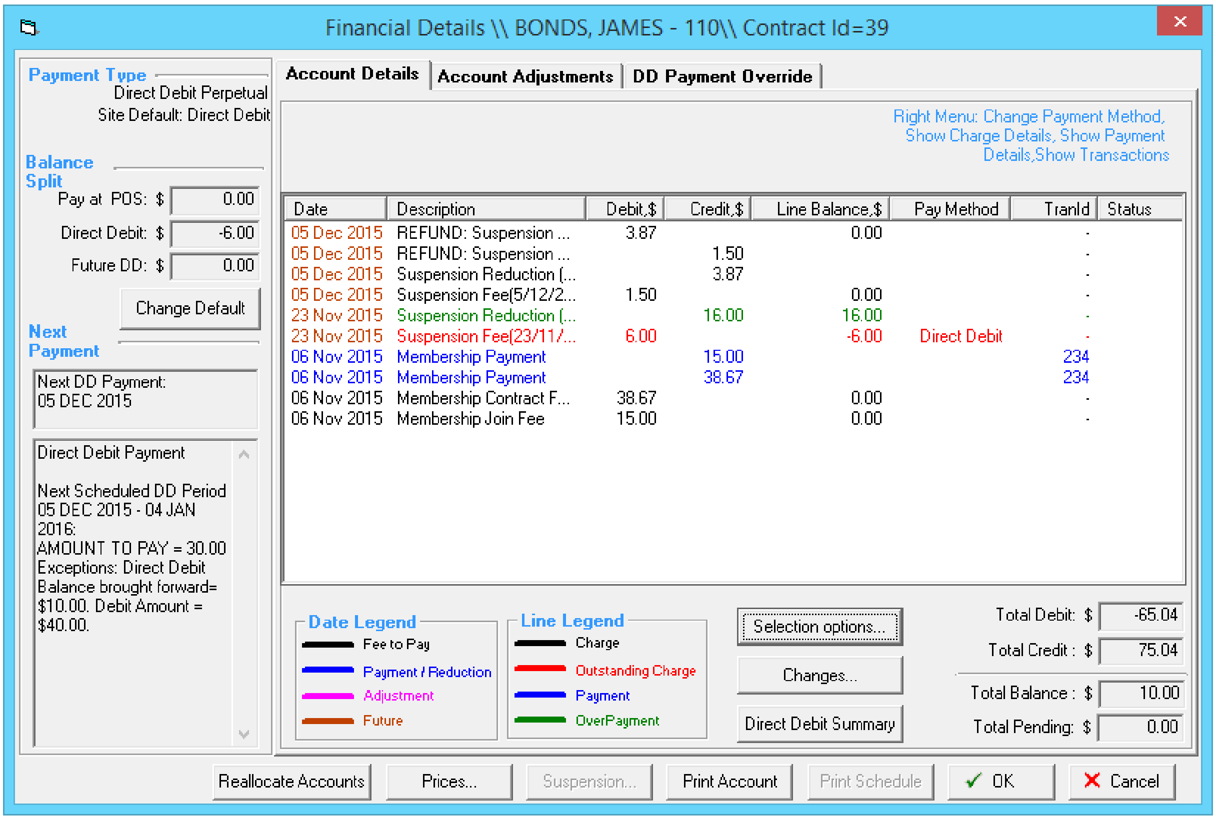


Viewing the Financial Details

Members> Contracts>View Customer Contracts> Financial

This screen can be accessed via the Suspension screen or the Membership Contract screen and shows the history of all financial details displays, showing all credits and debits that have occurred on the account.

Account Details Tab



- **Payment Type** - This is the payment type for the membership
- **Balance Split** - This nominates the payment mode (POS or Direct Debit) you wish to use in order to collect any monies owed to you from the member or pay any credits recorded against the member. E.g. Money owed to the member could be credited against the next direct debit run
- **Next Payment** - Shows the date of the next payment to be made and the mode of payment. If there is any credit or extra fees they will also appear in this column
- **Date Legend** - This will correspond to any date on the transaction lines. E.g. Black = fee to be paid; pink = adjustment made
- **Line Legend** - The transaction line (excluding the date) will be displayed in a colour depending on the charge, whether it is a charge = black or payment = blue
- **Selection Options** - To alter the way in which the screen displays details. E.g. Limit the date range displayed; POS splits or direct debit splits display only
- **Changes** - Shows any changes made to the account, detailing what the changes were and whom it was made by
- **Direct Debit Summary** - Will show the summary of any direct debit payments, you have the ability to filter dates as well as print this off
- **Reallocate Accounts** - Will reallocate all payments made to this contract to charges on this contract
- **Prices** - Will take you to the Contract Prices screen where you can view and change the contract price
- **Suspension** - Will take you to this customer's Suspension screen, to make changes or view suspensions

- **Print Account** - Will print the member's financial account, all debit s and credits made. This will print what is currently showing as transactions, you can use the [Selection options…] button to show only certain transactions

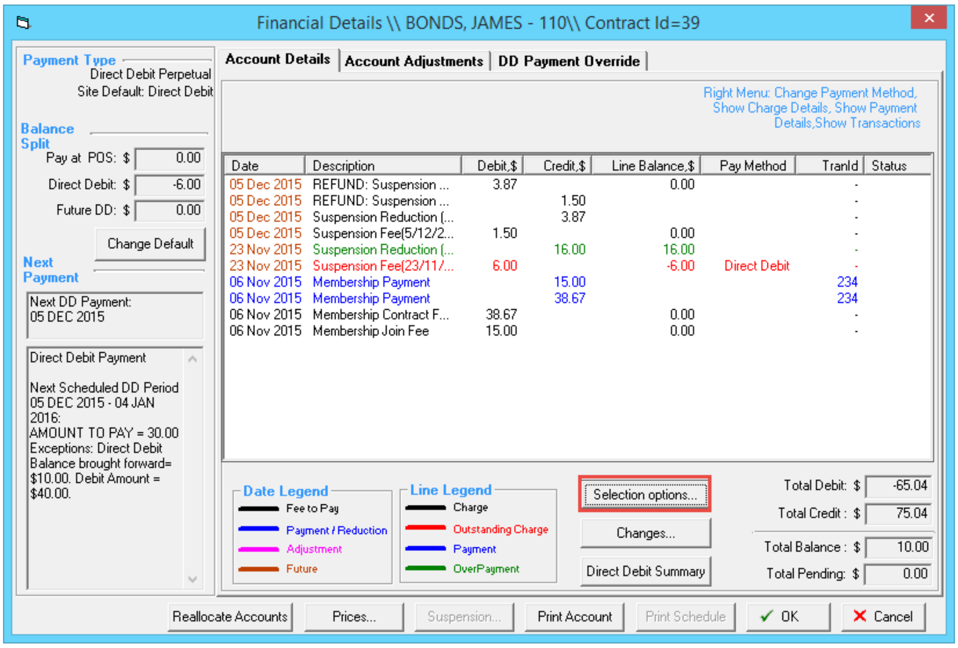
Account Details Options

Members> Contracts> View Customer Contracts> Financials> Selection Options…

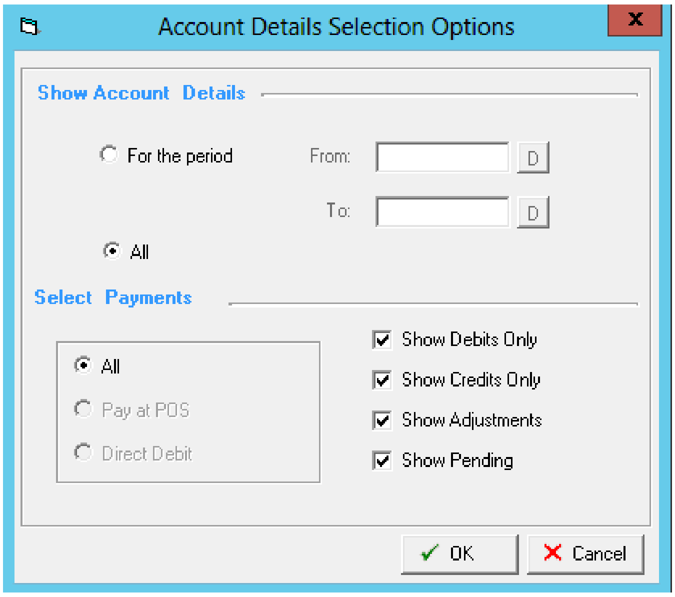
You can select to view and print out financial details for a customer's membership contract. This includes the following options:

- Date selection option
- Payment option
- Debits only
- Credits only
- Adjustments
- Pending
- Or all of the above

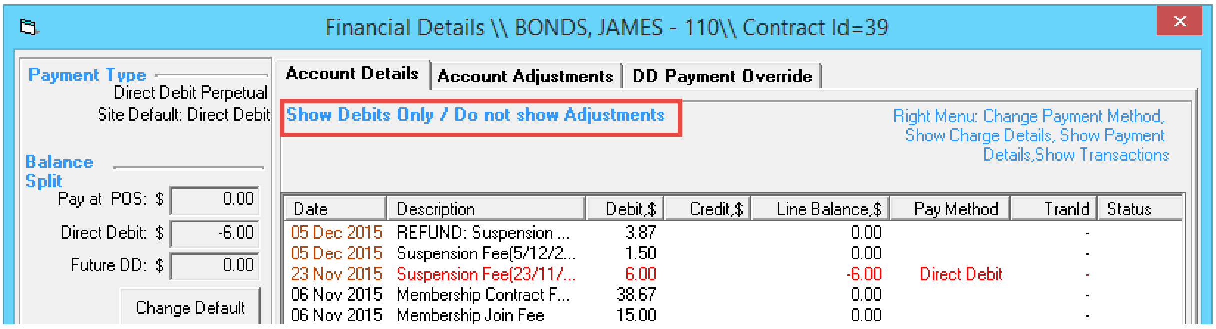
1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select [Financial] to open the customer's Financial Details screen



3. From the Account Details tab select [Selection options…]



4. Select the options you wish to filter by:
    - Show Account Details
        - For the period; when selected you can choose the from and to dates
        - All; when selected will show all dates
    - Select Payments
        - All; when selected will show both POS and direct debit payments
        - Pay at POS; shows only POS payments when selected
        - Direct Debit; shows only direct debit payments when selected
    - Select the Payment details to view
        - Show debits only
        - Show credit only
        - Show adjustments
        - Show pending, all pending direct debit payments
          Note: This is for LinksPay/Integrated Payments ONLY.
5. Select [OK] and the filters you have set will now be applicable for this customer. The type of filter you have selected will show on the top left corner



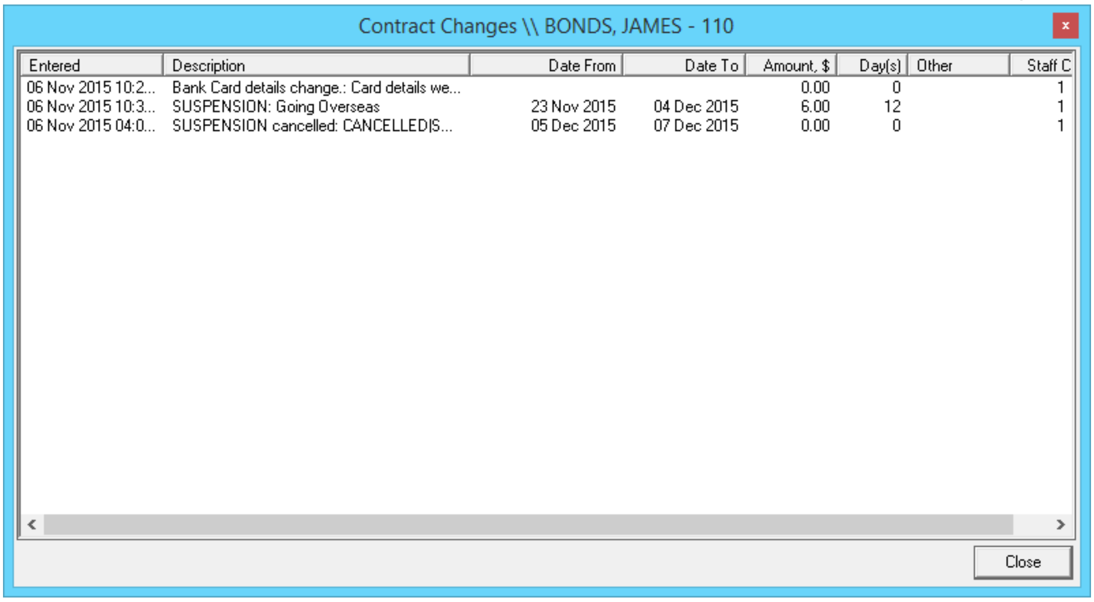
Viewing Contract Changes

Members> Contracts> View Customer Contracts> Financials> Changes…

To view any changes that have been made to this contract and by who, follow these instructions:

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter

   b. Scan their card
   c. Selecting the […] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Select the [Changes…] button
4. This will show any changes that have been made to this contract, the date, any amounts and the Staff ID of the staff member who performed the change

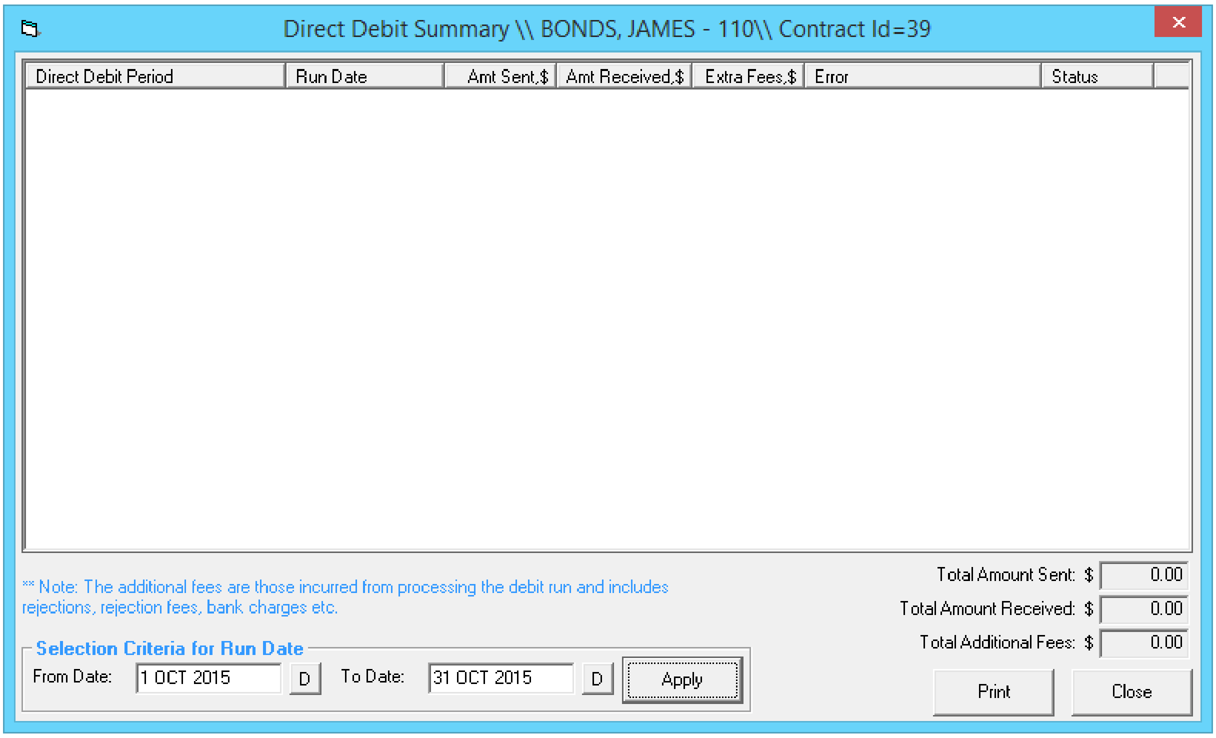


Direct Debit Summary

Members> Contracts> View Customer Contracts> Financials> Direct Debit Summary

This will show you a summary of the member's direct debits, the direct debit period, when it was run, the amount sent, the amount received and the status.

1. From the View Customer Contracts screen search for the member by either:
   a. Typing their Customer ID or surname and hitting enter
   b. Scan their card
   c. Selecting the […] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Select the [Direct Debit Summary] button



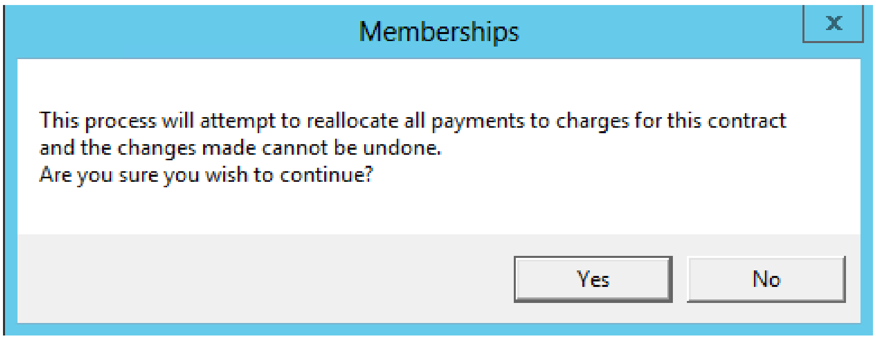
4. You can filter the dates for certain runs by selecting a 'From' and 'To' date and clicking [Apply]
5. You can also print the Direct Debit Summary by selecting [Print]

Reallocating Accounts

Members> Contracts> View Customer Contracts> Financials> Reallocating Accounts

This allows you to reallocate Customer's accounts, if a payment is not matching up to a debit against the Customer's account.

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Select the [Reallocate Accounts] button



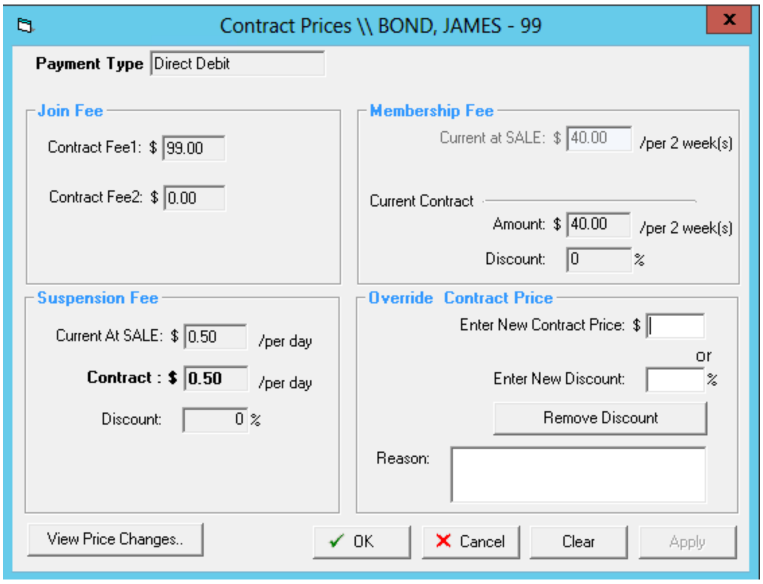
4. Select [Yes] to continue and the reallocation will occur

Overriding/Changing Contract Prices

Members> Contracts> View Customer Contracts> Financials> Prices

This screen displays information relating to the current contract applicable to the member. It displays the membership fee applicable and the mode of payment relevant to the contract. In addition, it also displays contract fees/suspension fees and any discounts which have been applied to the membership. The Contract Prices screen also allows you to permanently modify the customer's direct debit contract amount. Follow the steps below to change a member's contract price:

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Select the [Prices] button



4. Enter the new price or the percentage discount applicable
5. Enter a reason for the override
6. Select [Apply]
7. This will take effect from the next scheduled direct debit run

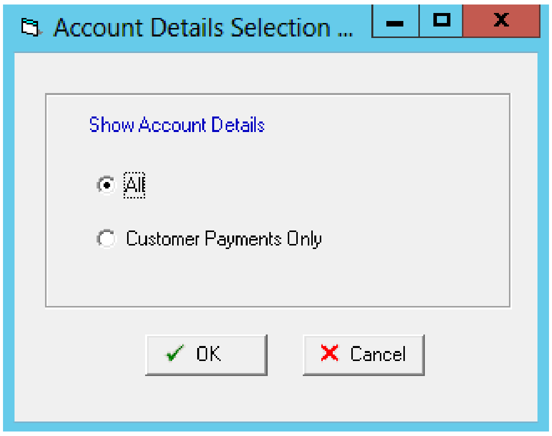
To view any price changes made select [View Price Changes] button.

Printing Account History

Members> Contracts> View Customer Contracts> Financials> Print Account

You are able to print an account history for a Member.

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Select the [Print Account] button

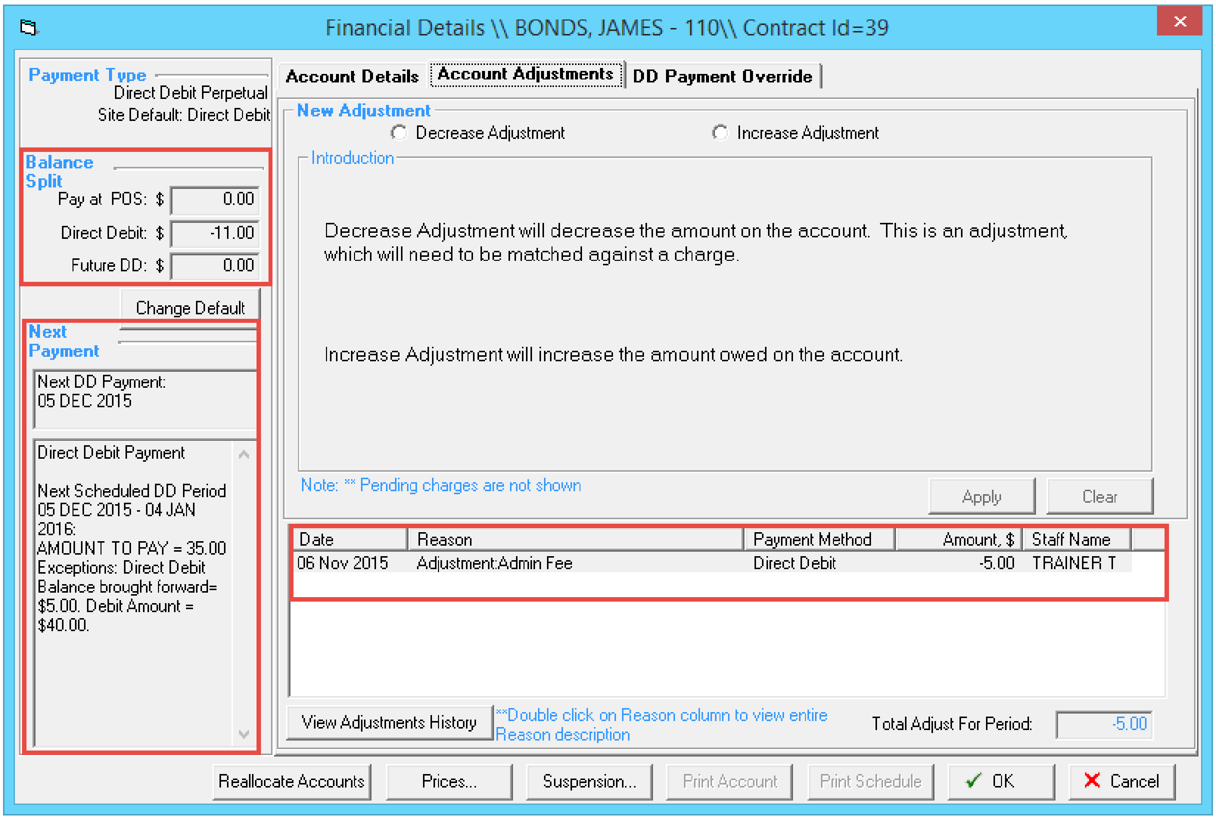


4. Select if you wish to print 'All' account history which will include fees and payments or 'Customer Payments Only'
5. Select [OK] and a tax invoice will be generated, ready for you to print

Accounts Adjustments Tab

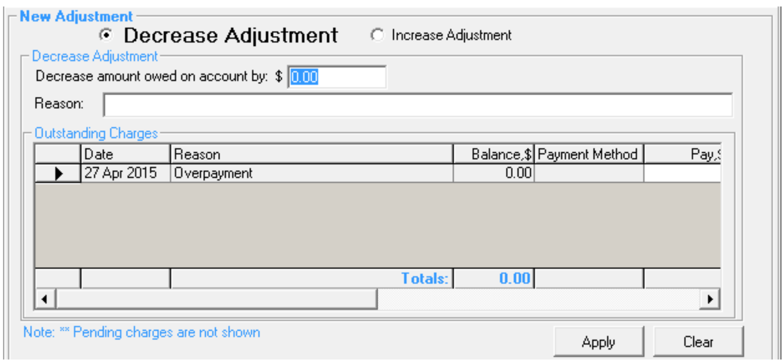
Members> Contracts> View Customer Contracts> Financials> Account Adjustment tab

This records any financial adjustments required to be made to a membership, you can decrease or increase the amount owing on a customer's account. The balance of the membership will display in the left hand summary preview pane. Any adjustments will show in the adjustment panel with the date, reason, amount and staff member that performed the adjustment.



To Decrease an Amount Owing on the Account

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
1. Select the [Financial] button to open the customer's Financial Details screen
2. Click on the 'Account Adjustment' tab
3. Select 'Decrease Adjustment'



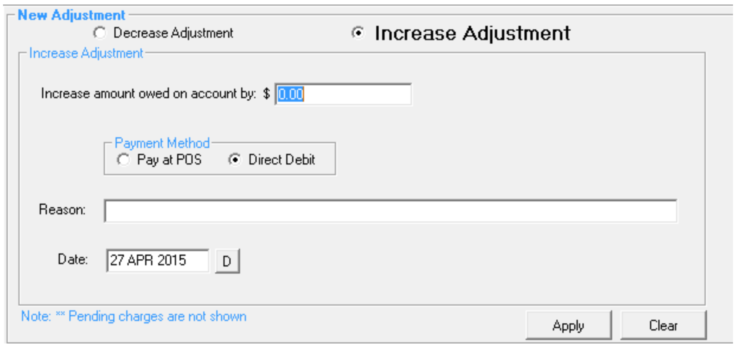
4. Enter the amount you wish to decrease the account by
5. Enter a reason as to why this amount has been decreased
6. Select [Apply]

Note: You will need to have the correct security settings to be able to decrease the amount owing.

To Increase an Amount Owing on the Account

Members> Contracts> View Customer Contracts> Financials> Account Adjustment tab

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Click on the 'Account Adjustment' tab
4. Select 'Increase Adjustment'

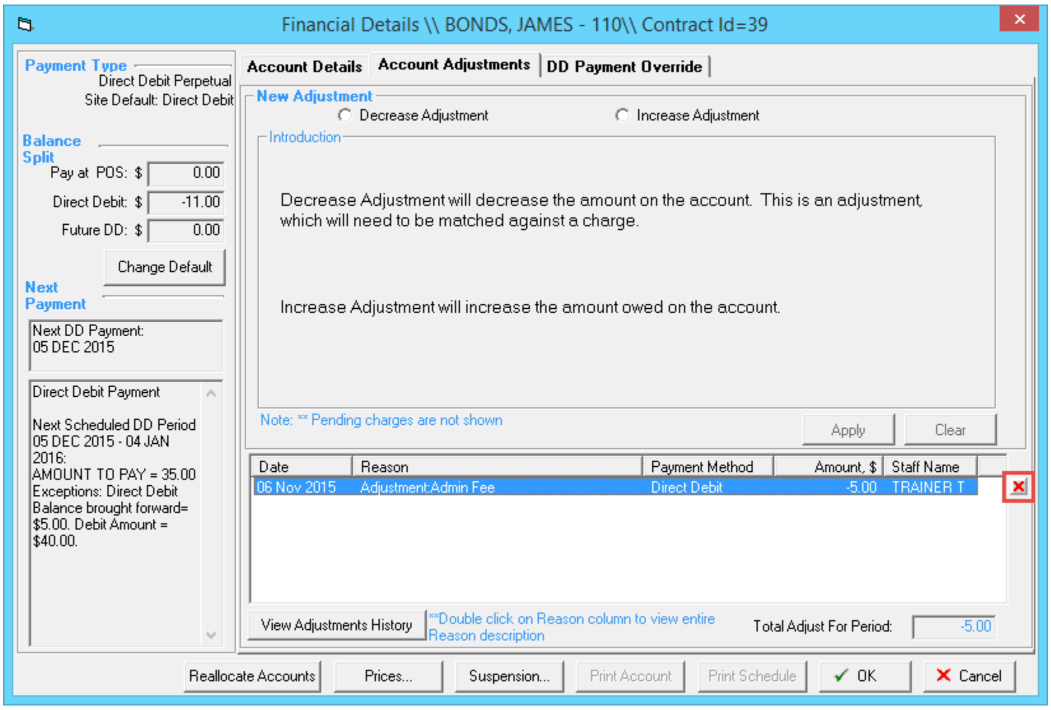


5. Enter the amount to 'Increase amount owed on account by'
6. Select how it is to be paid either 'POS' or 'Direct Debit'
7. Enter the reason for increasing the amount owed
8. Select the date for this to appear on the customer's account
9. Select [Apply]

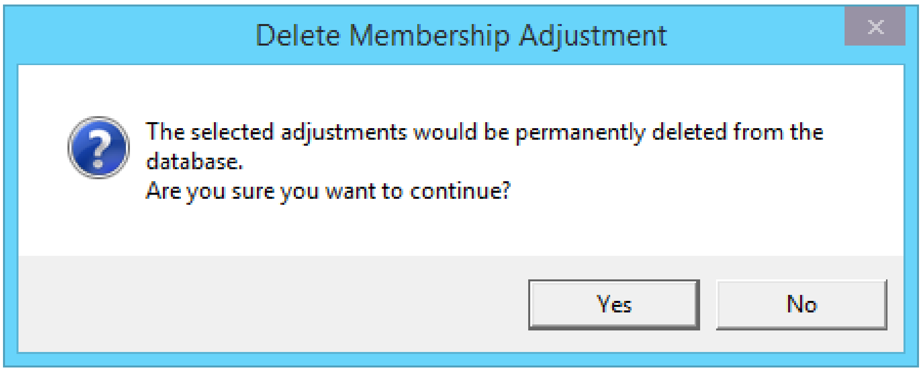
Note: You will need to have the correct security settings to be able to decrease the amount owing.

To Delete an Adjustment

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Click on the 'Account Adjustment' tab



4. Highlight the adjustment you wish to delete
5. Select the red cross on the far right hand side of the line



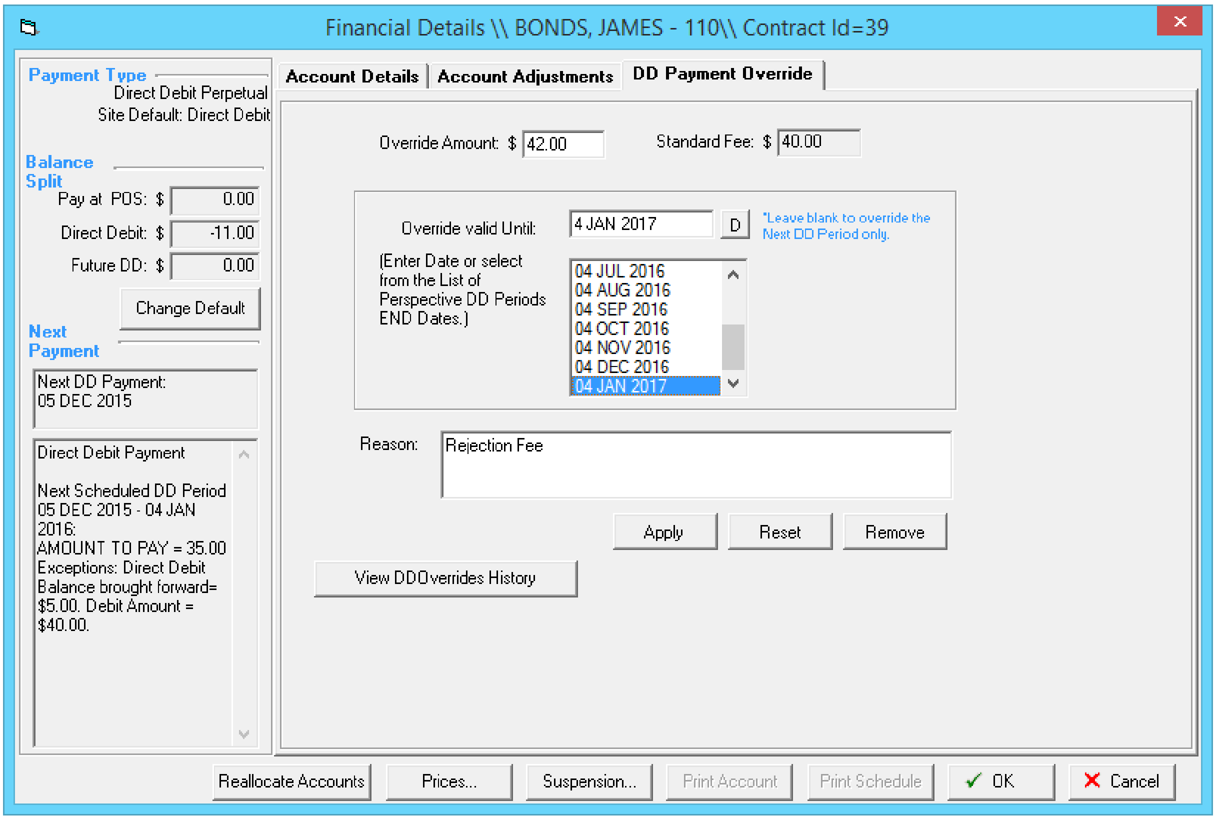
6. Select [Yes] and the adjustment will be removed

Note: You will need to have the correct security settings to be able to delete adjustments.

Direct Debit Payment Override Tab

Members> Contracts> View Customer Contracts> Financials> DD Payment Override

This screen is used to override one or more direct debits without permanently changing the contract amoutn. Previous direct debit overrides can be viewed and also removed.



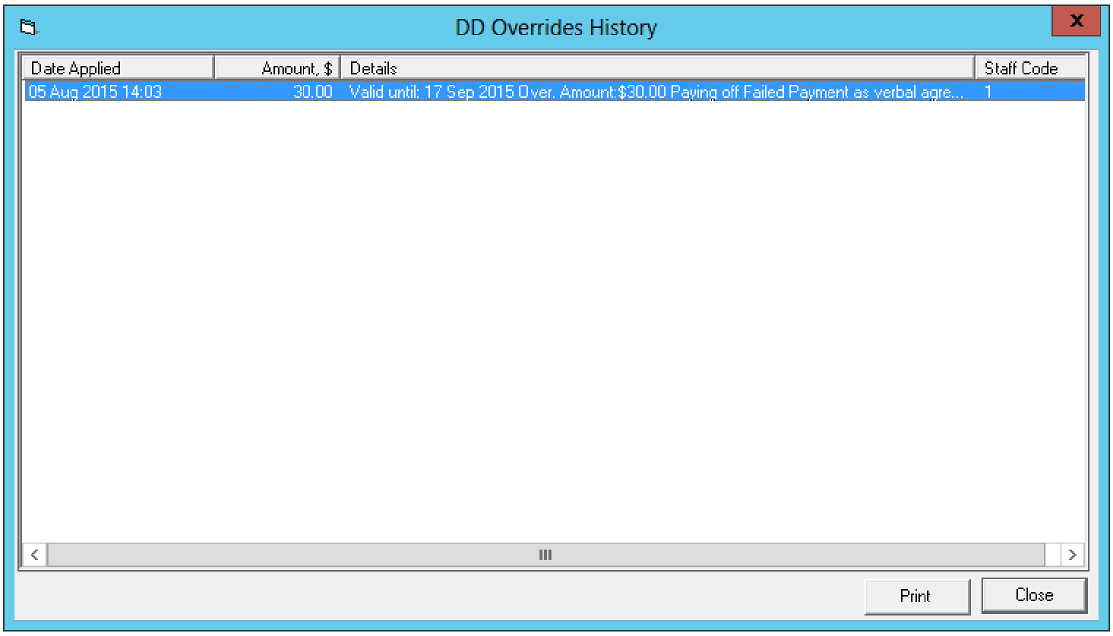
Applying a Direct Debit Override

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Click on the 'DD Payment Override' tab
4. In 'Override Amount' enter the amount you wish to override upcoming direct debit runs for
5. In 'Override Valid Until' enter or select the date of the last day of the last direct debit run you wish the override to take effect. E.g. If wanting it to take effect for the next six payments then the date would be the 4th January as this is the day before the third debit run from today. If you wish the override to take effect only for the next DD then leave this field blank
6. In the 'Reason' enter a reason for the override, this will appear in reports
7. Select [Apply]

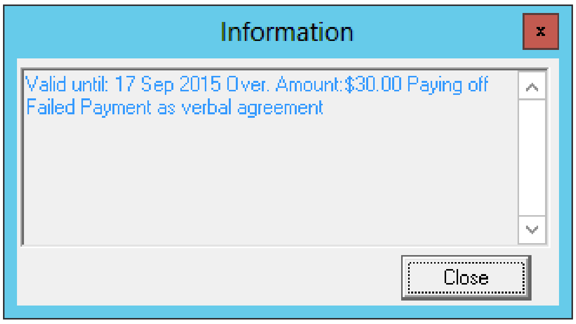
Viewing a Direct Debit Override

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Click on the 'DD Payment Override' tab

4. The current override will appear, to view the history of previous overrides select the [View DD Overrides History] button and the following will appear



5. To view more information on an override double click on it and the following screen with the override information will appear



Removing a Direct Debit Override

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Financial] button to open the customer's Financial Details screen
3. Click on the 'DD Payment Override' tab
4. The current override will appear, select the [Remove] button and this will clear the direct debit override and at the next debit the normal debit amount will be taken

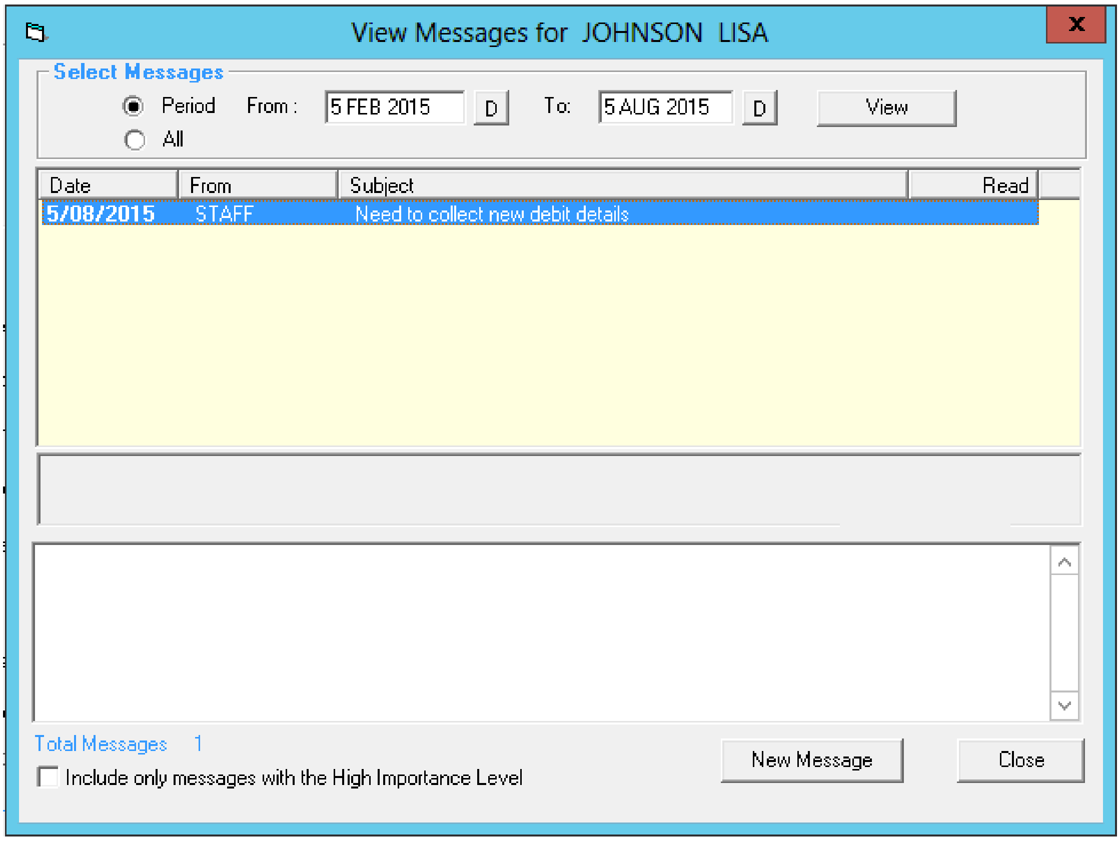
Messages

Members > Contracts> View Customer Contracts> Messages

This screen enables you to view any customer messages that have been generated and the message details.

Viewing Message History

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
2. Select the [Message] button



3. Select the date range to view your messages from the two options are:
    - **Period -** Enter in the 'From' and 'To' dates to select messages that were generated in a specific period
    - **All -** Select all messages generated
4. Select the [View] button, you will then see all messages based on your selection criteria
5. Click on the message from the list to view the full content

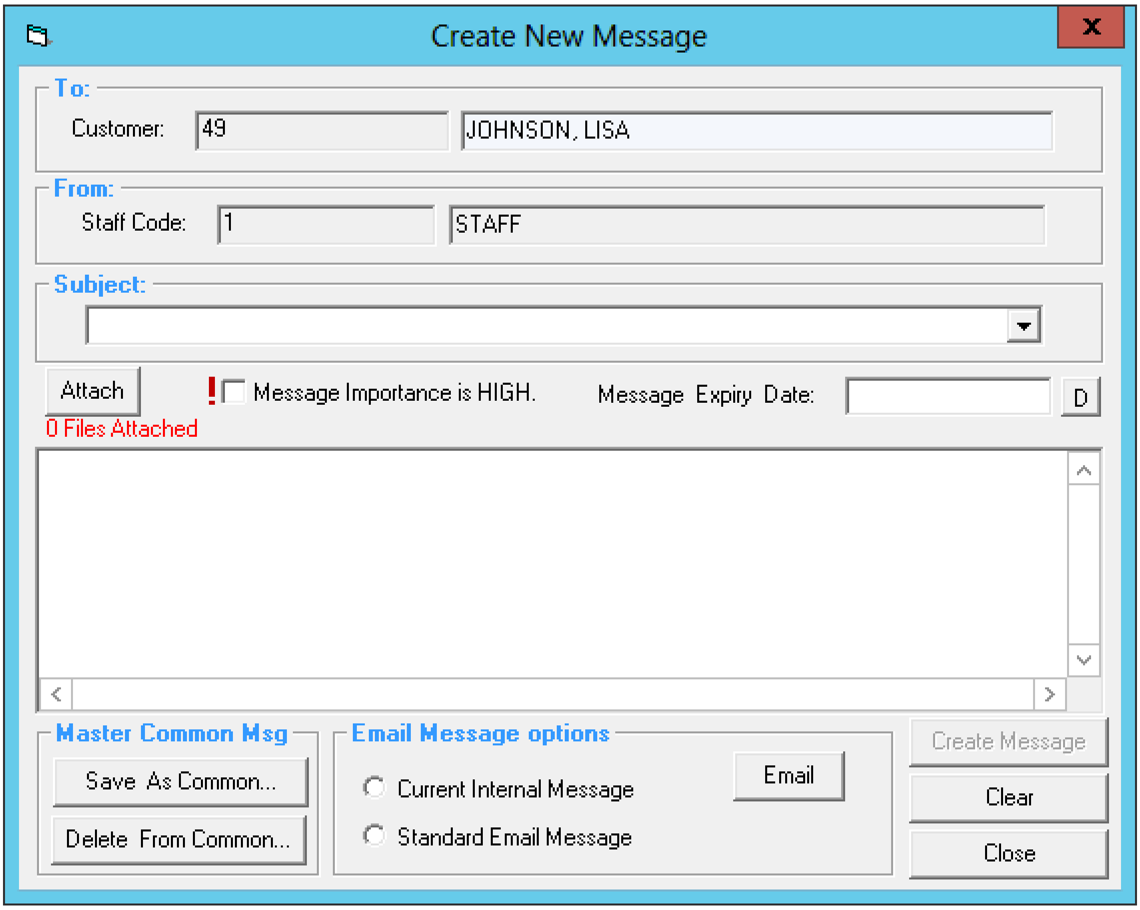
Creating a New Internal Message

Members > Contracts> View Customer Contracts> Messages

Internal messages are displayed as a 'pop up' when a customer scans in through POS. If the customer is entering via an entry point, this will disable access and the customer will be forced to a reception desk so that the message can be actioned by a staff member.

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card

c. Selecting the […] button
2. Select the [Message] button
3. Select the [New Message] button



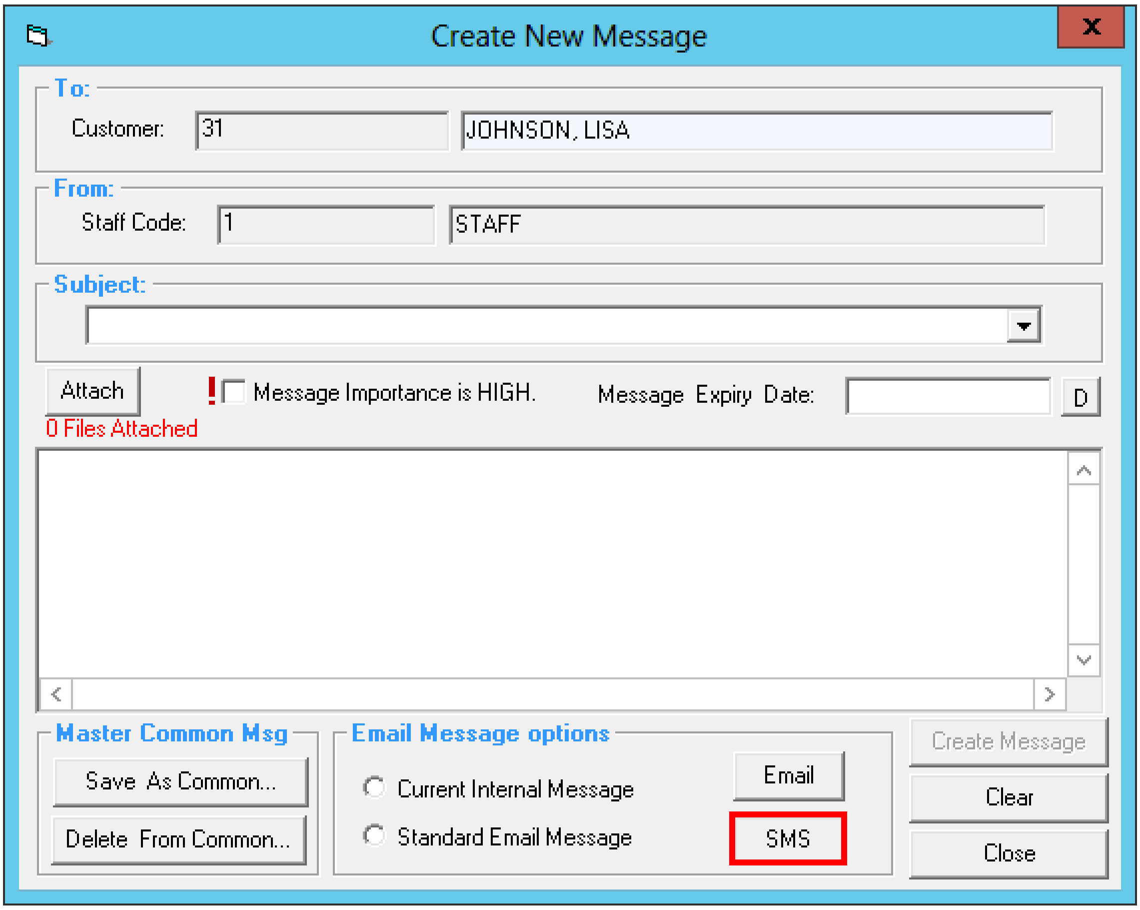
4. Enter a 'Subject' or using the drop down button select from common subjects (inclusive of message) that have previously been saved
5. Select if 'Message Importance is HIGH' (this will bold the subject)
6. Enter in a 'Message expiry date' if this message will expire on a set date or leave blank
7. Type in the message in the comment box or edit if you have selected a common message
8. Select 'Save As Common' If you wish to make this a common message, if it is not already and you use this message frequently
9. Select 'Current Internal Message'
10. Select the [Create Message] button

Creating an SMS

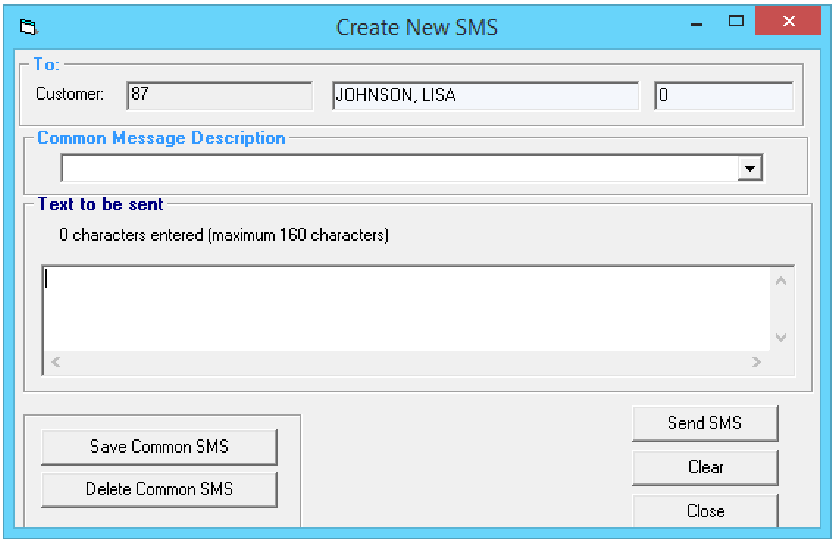
Note: The functionality of the Create New SMS screen mirrors that of the Create Internal Message screen.

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button

2. Select the [Message] button
3. Select the [New Message] button

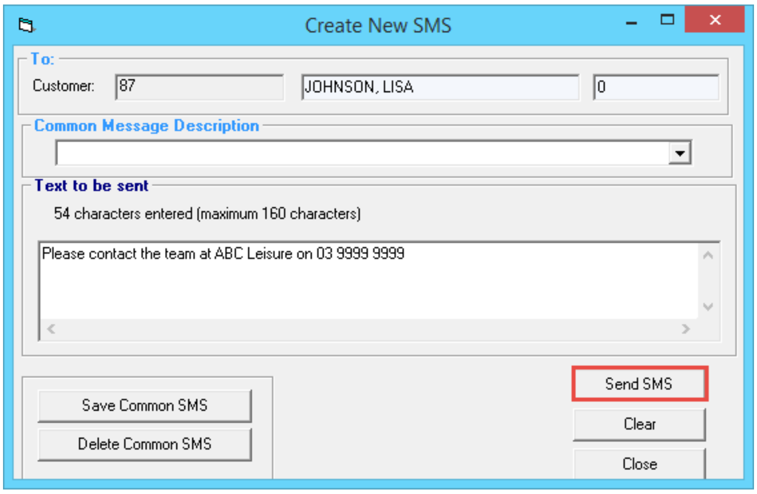


4. Select the [SMS] button and the following will appear



5. Select your 'Common Message' from the drop down if relevant or otherwise type in the content of the message
6. Select [Save Common SMS] if you wish to make this a common message, if not already. This allows you to use the same message frequently

7. Select the [Send SMS] button



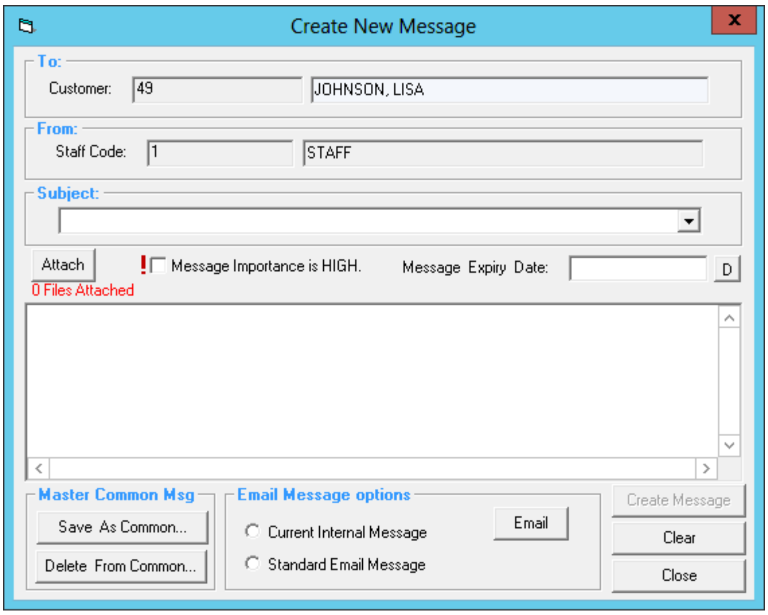
8. You will receive a message stating the SMS has been sent successfully

Note: Do not select send SMS again otherwise the message will be sent twice.

Creating an Email

Members > Contracts> View Customer Contracts> Messages

1. From the View Customer Contracts screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the [Message] button
3. Select the [New Message] button



4. Enter in a 'Subject' or using the drop down button select from common subjects (inclusive of message) that have previously been saved

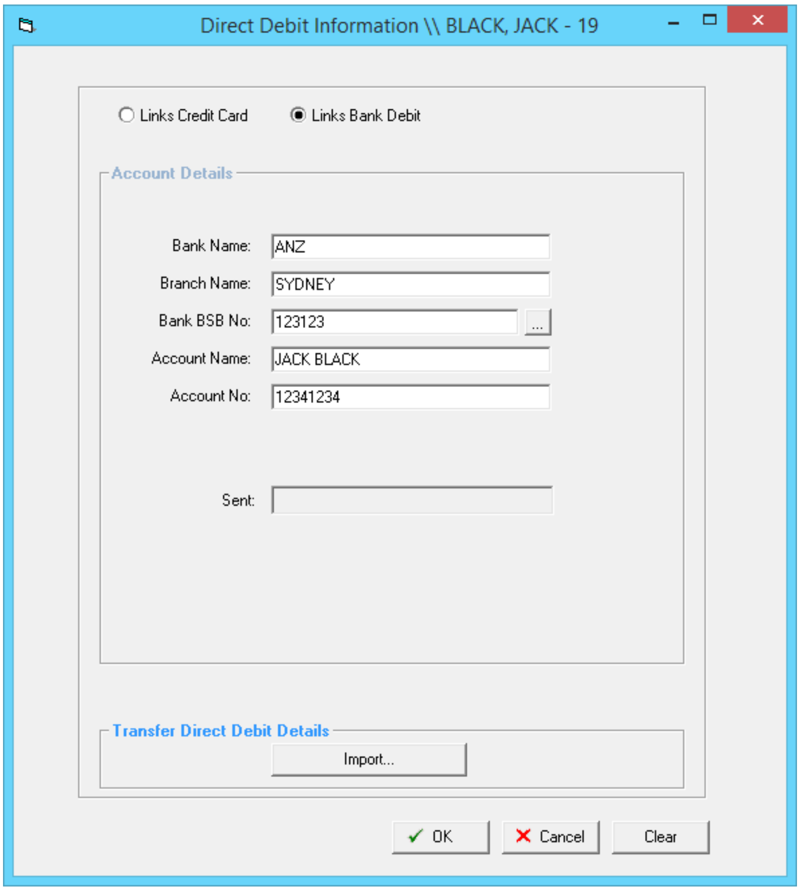
5. Attach any documents as applicable by selecting the [Attach] button and choosing the file
6. Select if 'Message Importance is HIGH'
7. Type in the message in the comment box or edit if you have selected a common message
8. Select [Save Common SMS] if you wish to make this a common message, if not already and you use the same message frequently
9. Select 'Current Internal Message'
10. Select the [Email] button
11. You will receive a message stating the email has been sent successfully

Payment Method

Members> Contracts> View Customer Contracts> Payment Method

This is where the member's credit card or bank account details are entered depending on the mode of payment to be made by the direct debit.

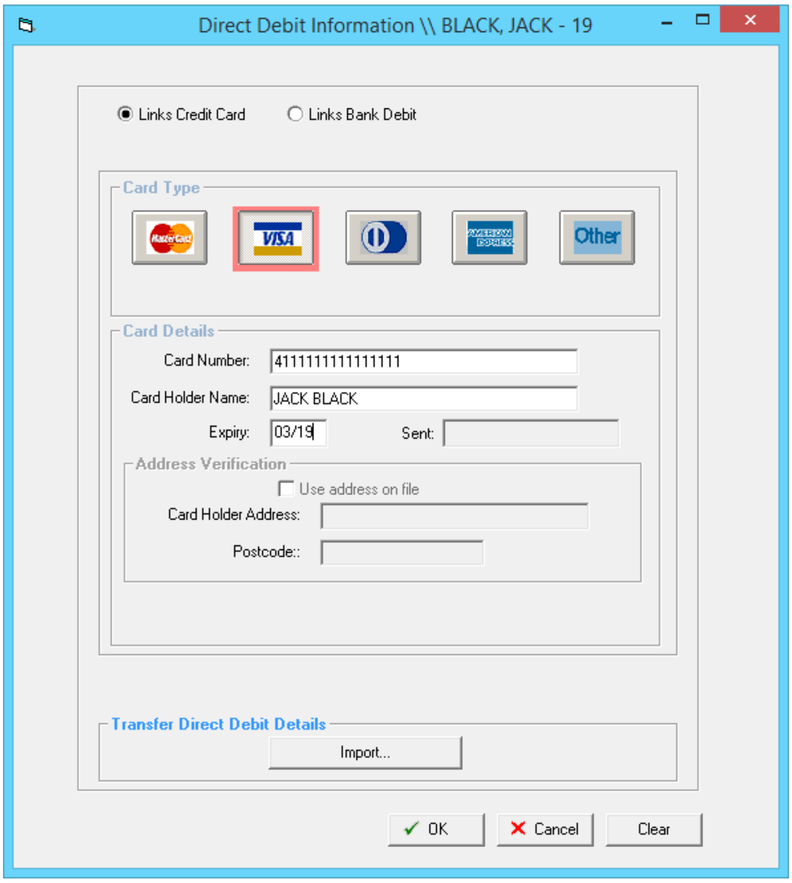
Bank Details



- **Bank Name** - This is the name of the bank that is used by the customer
- **Branch name** - The location of the store that the customer opened the account with, this is attached to the BSB number

- **Bank BSB No** - This is the BSB number for the bank and is always 6 numbers. This can be entered manually if known or searched for via the search icon to the right providing a BSB database has been loaded. Please refer to Admin> Site> Site Setup for loading of BSB numbers.
- **Account Name** - This is the name on the account holder for the bank account details provided
- **Account No** - This is the account number, the length of this number can vary between banks
- **Transfer Bank Account Details** - This refers to transferring the details from another contract or another customer. If the details have already been entered into another customer's record they can be searched for and imported into the current record on display

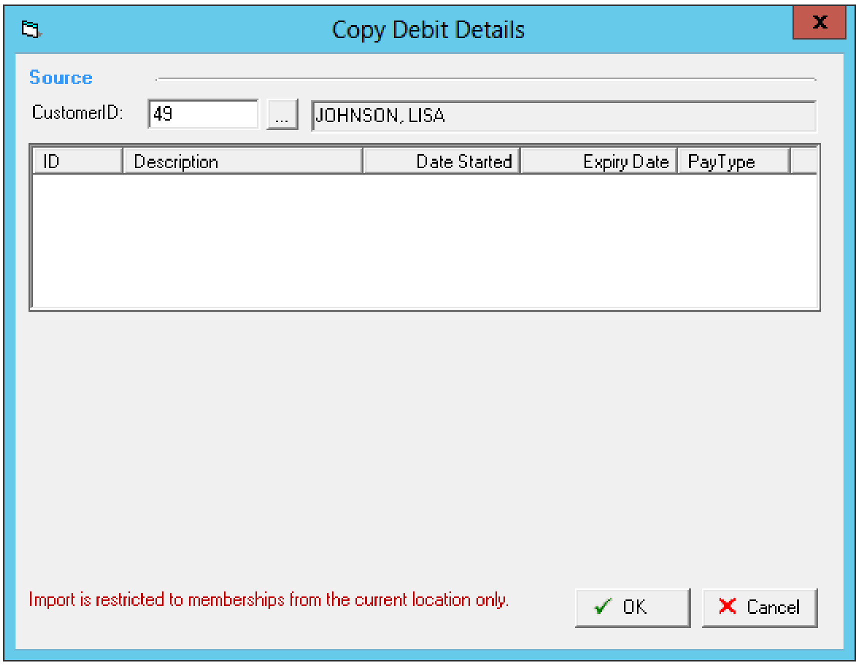
Credit Card



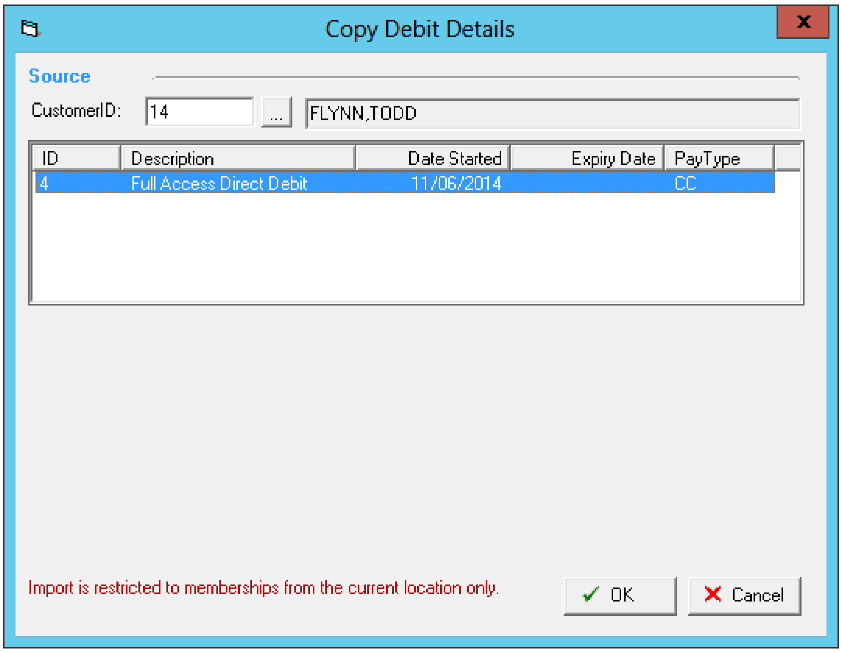
- **Card Type** – Select the card type
- **Card Number** – This is the credit card number. This is 16 numbers in length for Visa and MasterCard. The middle 8 numbers will be hashed out once saved e.g. 5555########5555
- **Card Holder Name** – The name that appears on the credit card
- **Expiry** – The expiry date of the credit card
- **Transfer Bank Account Details** - This refers to transferring the details from another contract or another customer. If the details have already been entered into another customer's record they can be searched for and imported into the current record on display

Importing CC/Bank Details from another Member

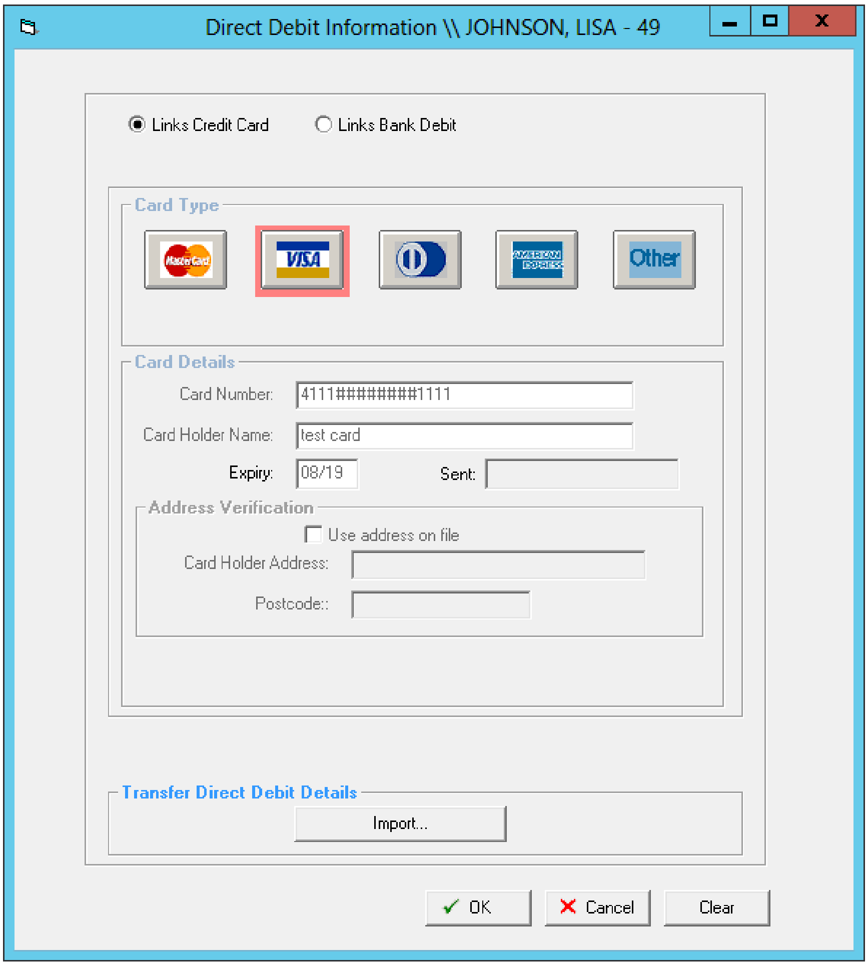
1. Select the [Import] button



2. Select the […] button to search for the member you wish to import the financial details from



3. Only current contracts that have direct debit details will be displayed in this screen. Select the relevant contract to transfer from
4. Select [OK] the direct debit details will appear encrypted select [OK] to save

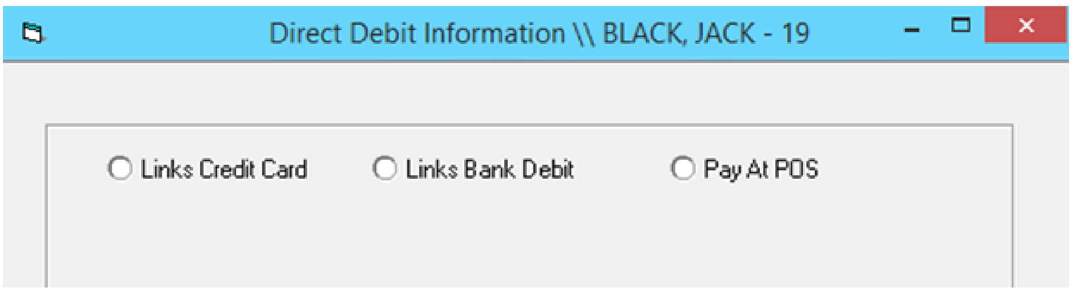


Pay at POS Memberships

Links has the ability to pay at POS for memberships which allows your customers to make their scheduled payment via POS. This assists sites using LinksPay who need to allow over the counter payments and not to be included in the 'Missing Debit Type' report.

Note: You must be operating LinksPay for this function to work.

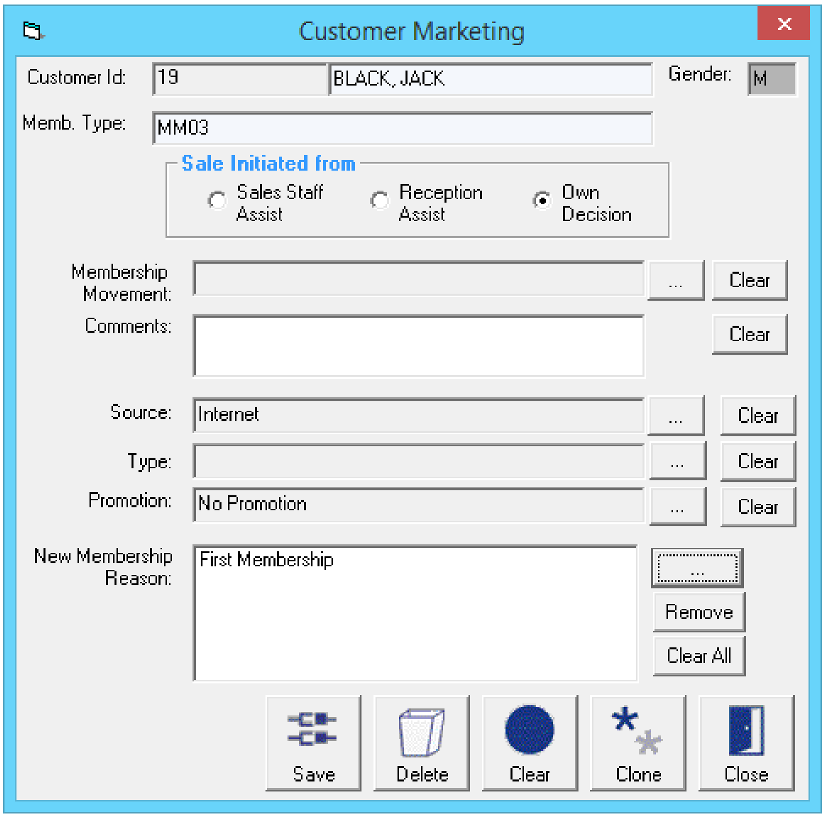
When setting up a new direct debit membership and entering in the direct debit information, there will be an option called 'Pay At POS'.



Contract Marketing Details

Members> Contracts> View Customer Contracts> Marketing

Here you can record customer and contract marketing details. Customer's marketing details may refer to why they initially joined and contract marketing details may refer to why they brought that particular contract.



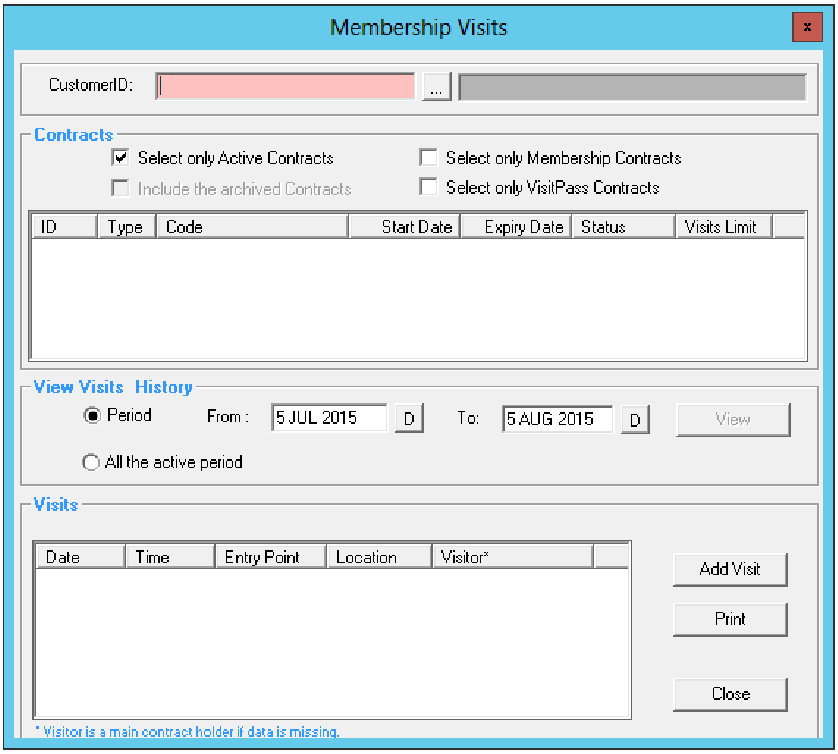
- **Sale Initiated from** - This denotes who sold the contract and how it was sold
- **Membership Movements** - This denotes the movement from a previous contract
- **Comments** - Any comments on this sale
- **Source** - The source of marketing that enticed the customer to purchase the contract
- **Type** - The type of marketing used
- **Promotion** - The particular promotion that enticed the customer to purchase the contract
- **New Membership Reason** - The customer's reasons for purchasing this contract

Visit History

Members> Visits> Memberships Visits

This screen displays the history of a member's visits for a particular date range or for all of the active period of the membership.

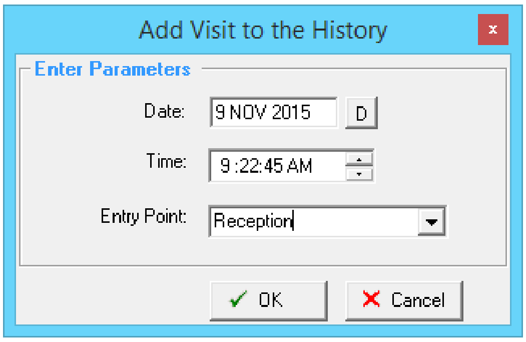
Viewing a Members Visit History



1. From the Membership Visits screen search for the member by either:
   a. Typing their Customer ID or surname and hitting enter
   b. Scan their card
   c. Selecting the [...] button
2. Select the contracts you wish to view, either:
   a. Select only Active Contracts
   b. Include the archived Contracts
   c. Select only Membership Contracts
   d. Select only VisitPass Contracts
3. If there is more than one membership contract highlight the one you wish to see the visits for
4. Select either the date ranges to view from either of the below options:
   a. 'Period' and enter a from and to date and select [View]
   b. 'All the active period'
5. You can now add, remove visits or print the history. See below for further information.

Manually Recording a Member's Visit

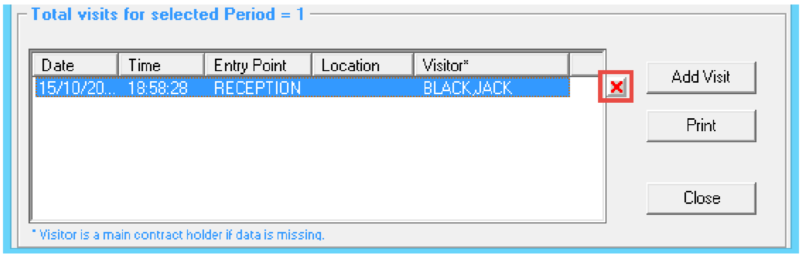
1. From the Membership Visits screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the contracts you wish to view, either:
    a. Select only Active Contracts
    b. Include the archived Contracts
    c. Select only Membership Contracts
    d. Select only VisitPass Contracts
3. If there is more than one membership contract highlight the one you wish to see the visits for
4. Select either the date ranges to view from either of the below options:
    a. 'Period' and enter a from and to date and select [View]
    b. 'All the active period'
5. Select [Add Visit] button



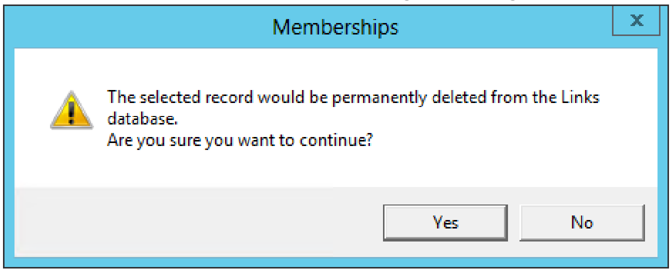
6. Enter the date of the visit
7. Enter the time of the visit
8. Select the entry point from the drop down menu
9. Select [OK]

Deleting a Visit

1. From the Membership Visits screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the contracts you wish to view, either:
    a. Select only Active Contracts
    b. Include the archived Contracts
    c. Select only Membership Contracts
    d. Select only VisitPass Contracts
3. If there is more than one membership contract highlight the one you wish to see the visits for
4. Select either the date ranges to view from either of the below options:
    a. 'Period' and enter a from and to date and select [View]
    b. 'All the active period'
5. Highlight the visit you wish to remove
6. Select the red cross at far right hand side of the line



7. You will see the following message



8. Select [Yes] or [No]

Printing Visit History

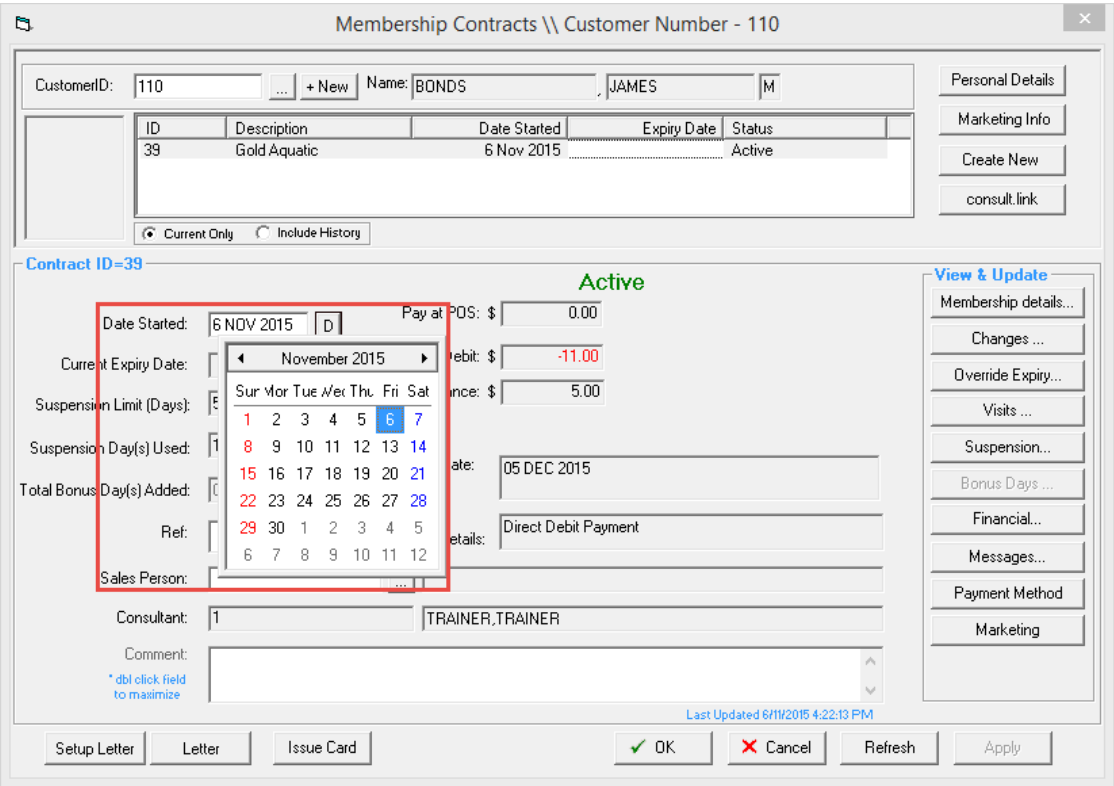
1. From the Membership Visits screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the […] button
2. Select the contracts you wish to view, either:
    a. Select only Active Contracts
    b. Include the archived Contracts
    c. Select only Membership Contracts
    d. Select only VisitPass Contracts
3. If there is more than one membership contract highlight the one you wish to see the visits for
4. Select either the date ranges to view from either of the below options:
    a. 'Period' and enter a from and to date and select [View]
    b. 'All the active period'
5. If there is more than one membership contract highlight the one you wish to see the visits for
6. Select the [Print] button and a word document will be created ready for you to print

Changing/Editing the Start Date of a Membership Contract

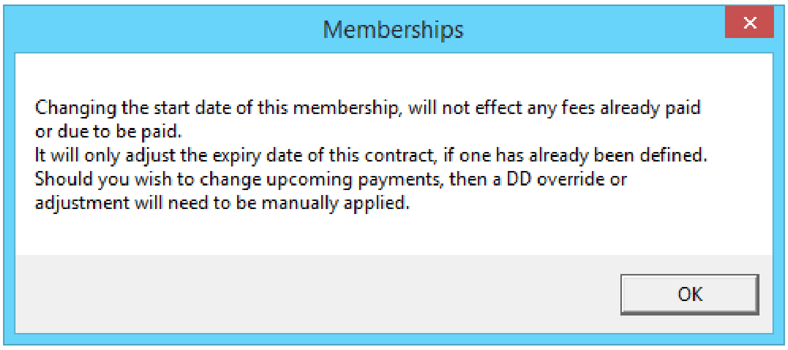
Members> Contracts> View customer contracts

You can edit the start date of a membership if there has been a mistake made with the date issued.
Note: This will not affect pro rata amounts charged or amounts paid.

1. Search for the customer you wish to make changes to



2. Select the new start date of the membership, the below pop up will appear once the new date is selected



3. Click [OK] to apply the new start date will be applied

Note: The start date can only be edited if the Security Group for the staff member logged in is able to modify accounts.

To give staff access to being able to change the dates an administrator will need to access the Admin Module and amend the Security Groups.

Corporate Memberships

Links allows you to setup corporate memberships which allow you to offer memberships at a discounted rate. Payments can be setup to incorporate a full or partial payment of the fees by the client. This can then be invoiced through Links.

Corporate memberships work in three ways:

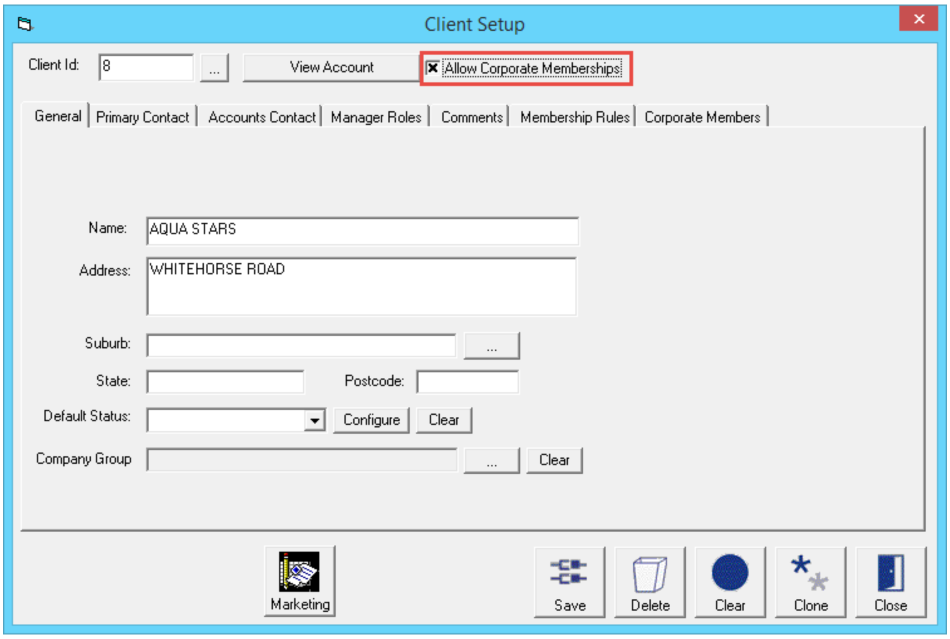
1. Offer corporate discounts to selected companies. For example, anyone that works for Coles is offered a 20% discount
2. Spilt the cost of the membership between the customer and the employer or charge the employer the full amount. For example the total cost for a membership is $100 per month, the customer pays half and the employer pays the other half
3. A combination of 1 and 2. For example, the total cost for a membership is $100 per month, a customer is given 20% discount for working for Coles, leaving $80 to be paid. The customer pays $40 and the employer pays $40

Note: Corporate Memberships only work for ***direct debit Membership Types.***

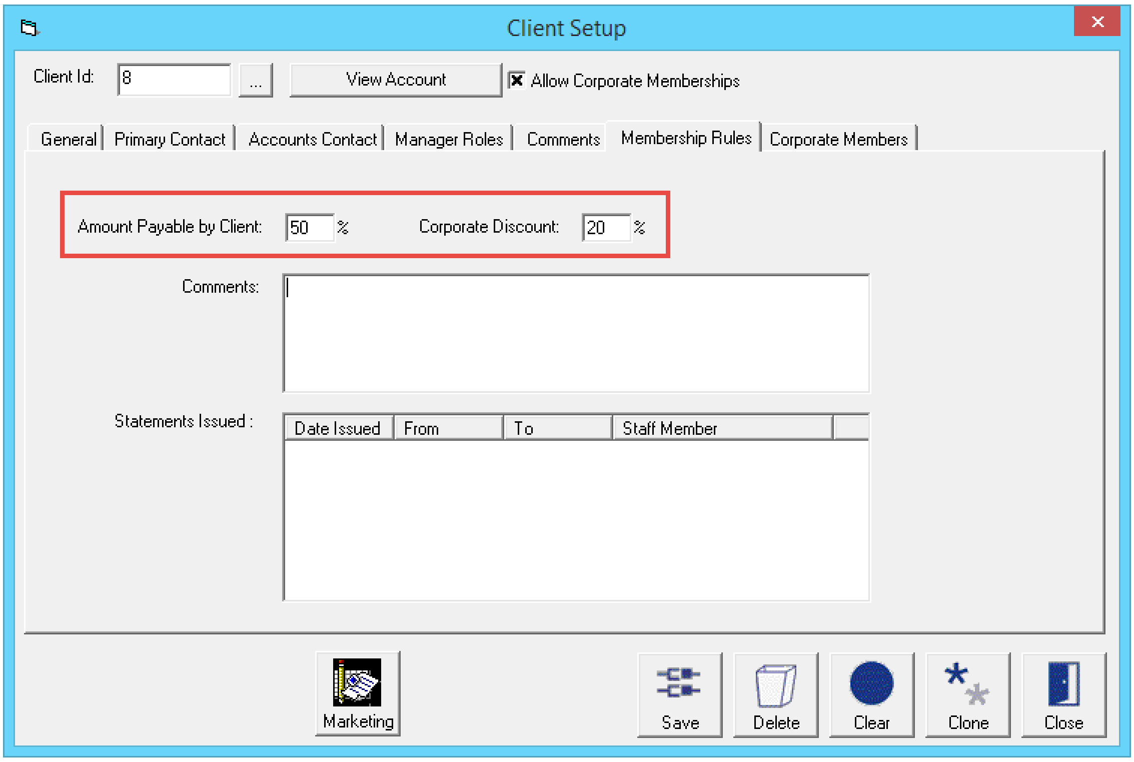
Setting up a Client to Charge Corporate Memberships

POS> Customers> Invoice Accounts> Clients

To be able to set up a corporate membership you must ensure the check box is selected under Client Setup as shown below.



1. Ensure 'Allow Corporate Memberships' is selected
2. Select the Membership Rules tab. Here you will be able decide on what discounts/payment splits will apply for this client



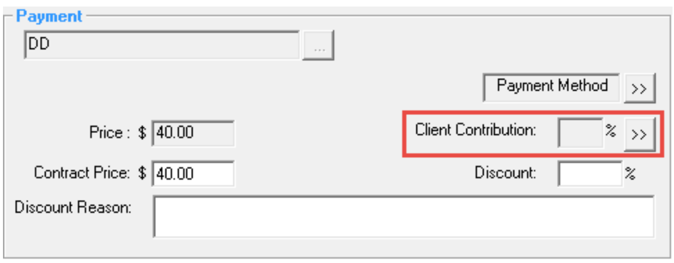
- **Amount Payable by Client** - This denotes the percentage payable by the client
- **Corporate Discount** - This denotes the percentage discount that will be applied applied

For example; from the screen shot above the payment spilt is determined as 50% payable by the customer and the other 50% payable by the employer. A corporate discount of 20% has been applied to the customer.

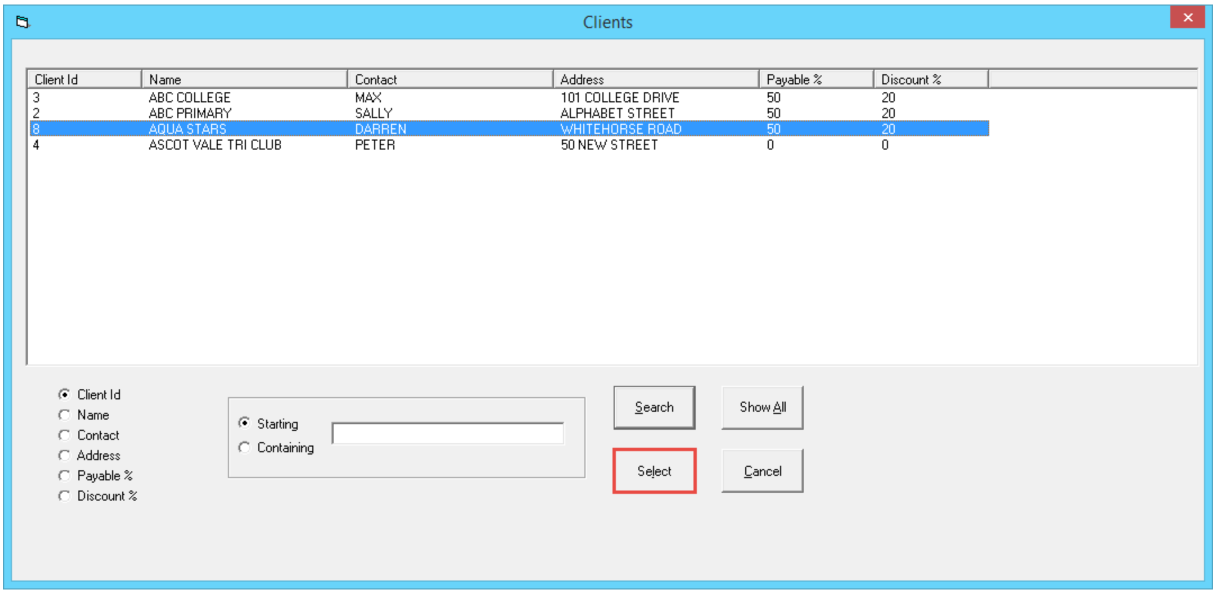
Selling a Corporate Membership

Selling a corporate membership is the same process as selling a standard membership, however, there is one extra step involved within the new membership screen. For more information regarding selling standard direct debit memberships please see the POS User Guide.

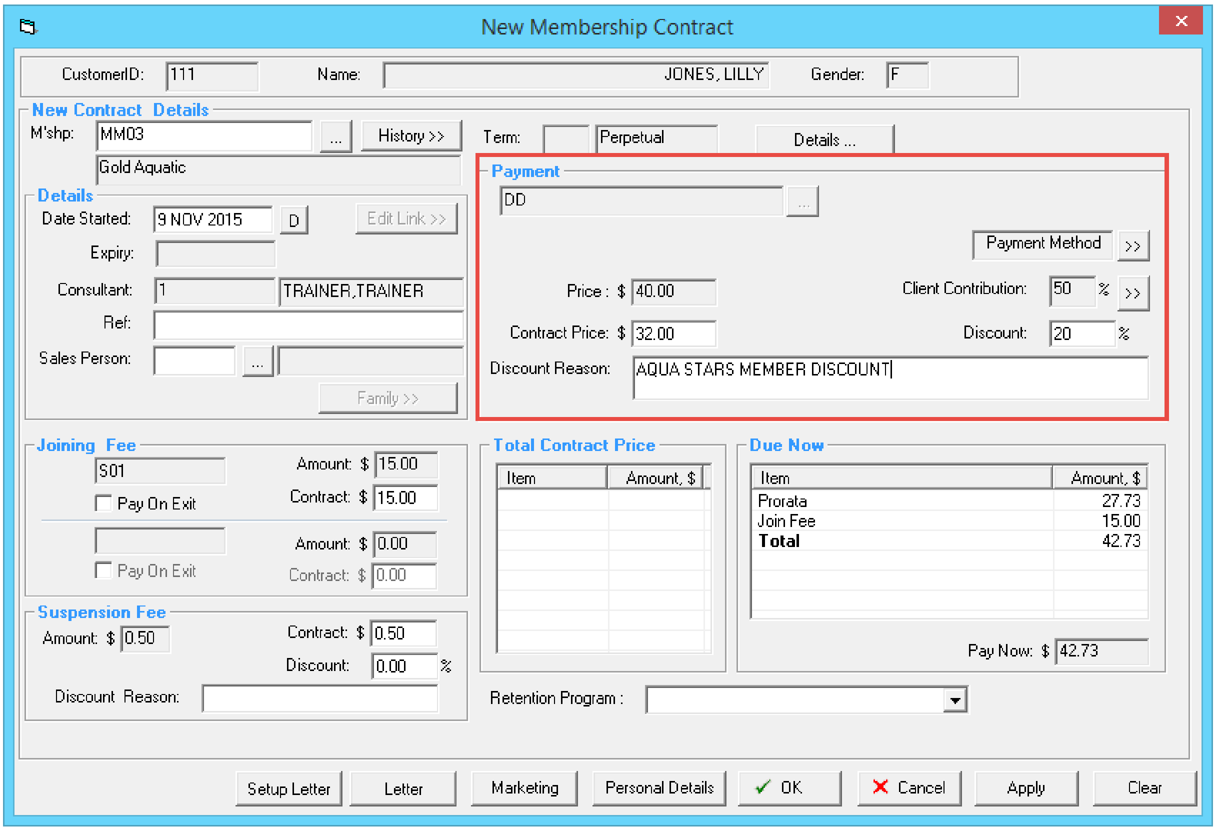
Under the 'Payment' heading a 'Client Contribution' field will now display.



1. Select the [>>] button to view the clients that offer corporate memberships to apply to the customer



2. Select the required client for the corporate membership
3. Click [Select]



4. You will be taken back to the New Membership Contract screen where if you have a discount applied to your corporate memberships you will be asked to enter a discount reason under the payment heading
5. Under the payment heading it will also now display the 'Client Contribution' percentage

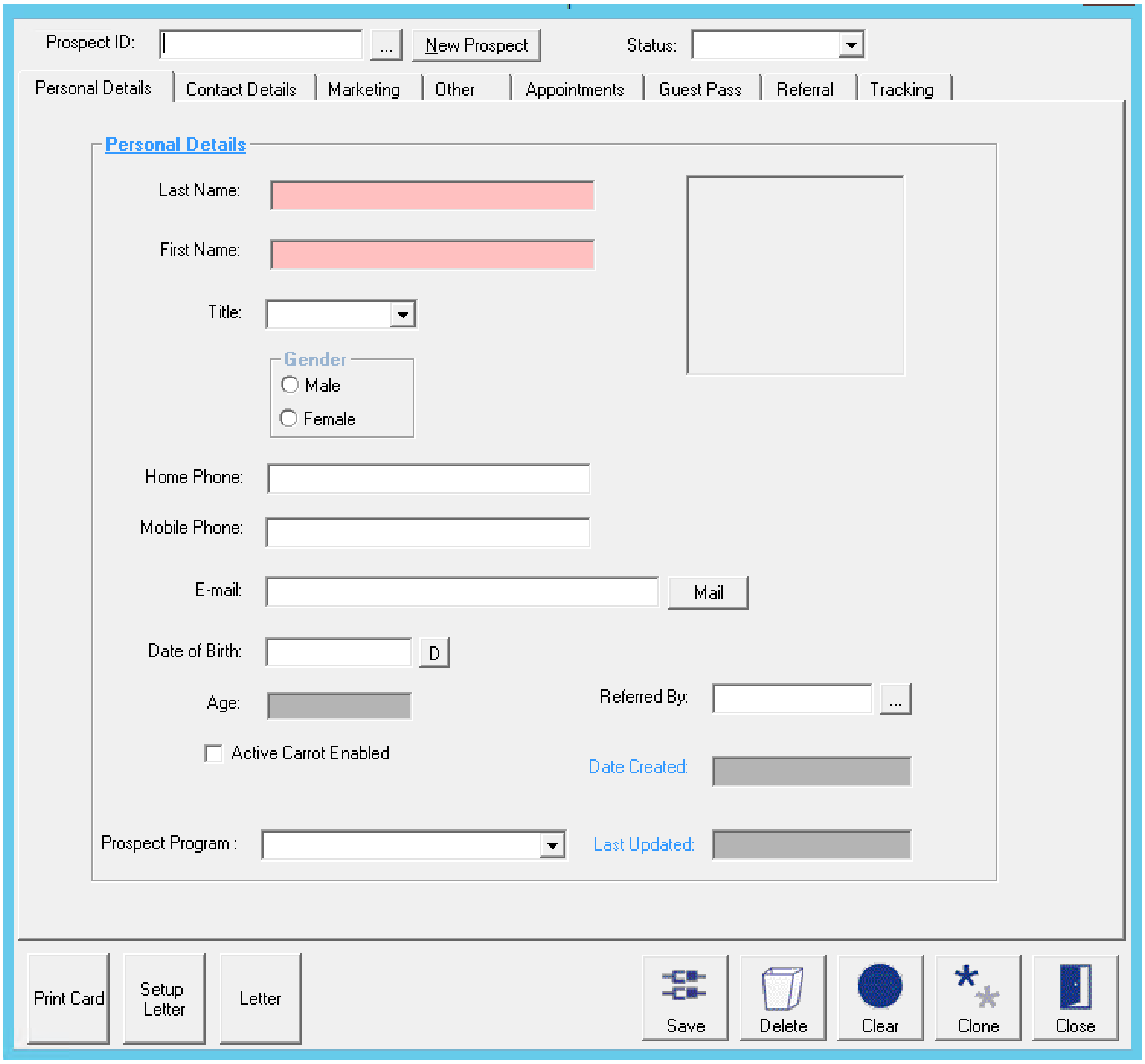
Entering a Prospect

Members> Retention> Prospects

A prospect is a potential customer; you have the option to enter your prospects via this screen. Links will generate a Prospect ID number (only the name and gender are required to generate a new Prospect ID number) for a new prospect.

Note: Additional fields can be turned on as mandatory should your centre require. Please see the Admin User Guide for more information. For ease of entry, a POS function button can also be added to your POS Touchscreen layout. For a guide on how to do this, please see the POS User Guide.

From this screen you are also able to search existing prospects that have already been entered.



Details of priority in tracking and any appointments made can then be produced via Reporting > Marketing for follow up. See Customer Marketing Details above for further information.

As the prospect's status changes it can also be updated to 'dead lead' or whichever is most applicable from the status' available in the drop down list. When a prospect is sold a membership it will automatically be changed to 'joined' provided the same customer ID has been used.

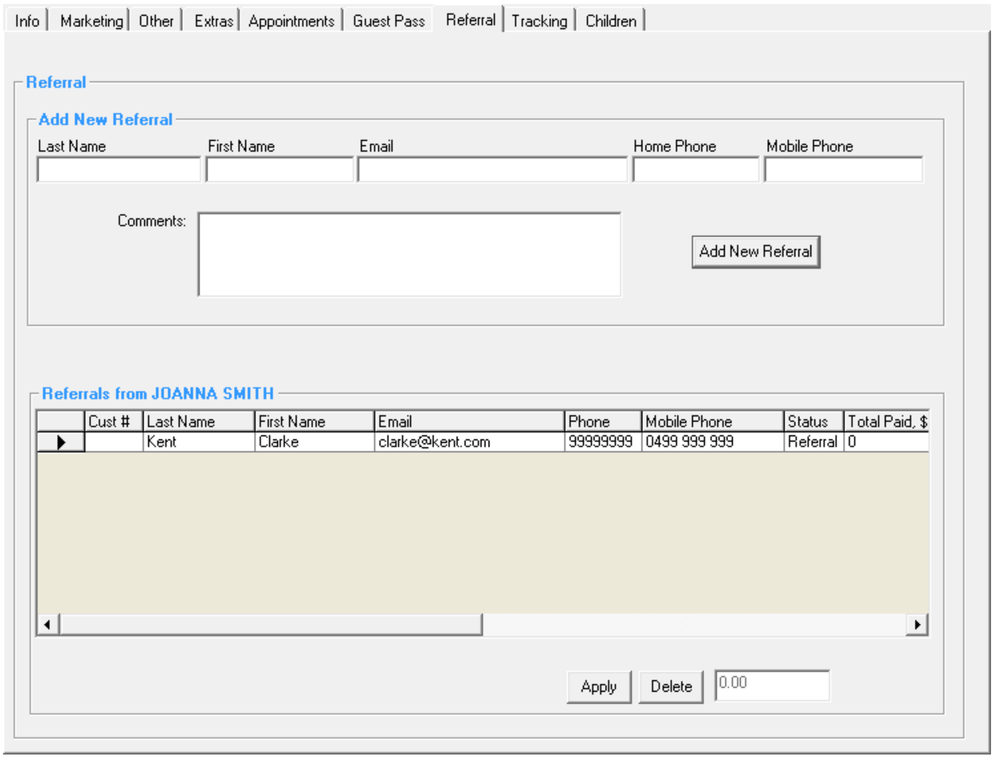
Entering a Referral

Members> Contracts> View Customer Contracts

Once in the Members Contract screen search for the member who made the referral and then click on the [Marketing Info] button to open the Customer Marketing screen.

Open the Referrals tab, it is here where you can enter and view referrals made by this member. You may have a referral program where a member receives benefits for the amount of referrals they make.

Note: The referrals feature is best used as part of the Retention Module. This module allows you to produce a list of all referrals for follow up.



Fill in the details for the referral and select [Add New Referral] and they will now appear as a referral for this member.

Viewing Referrals

Members> Retention> Referrals

If you are using the Retention Module all referrals that have been added can be viewed through this screen. For more information please see the Retention User Guide.

Note: This screen is only available to those Links clients who have purchased the Retention Module.

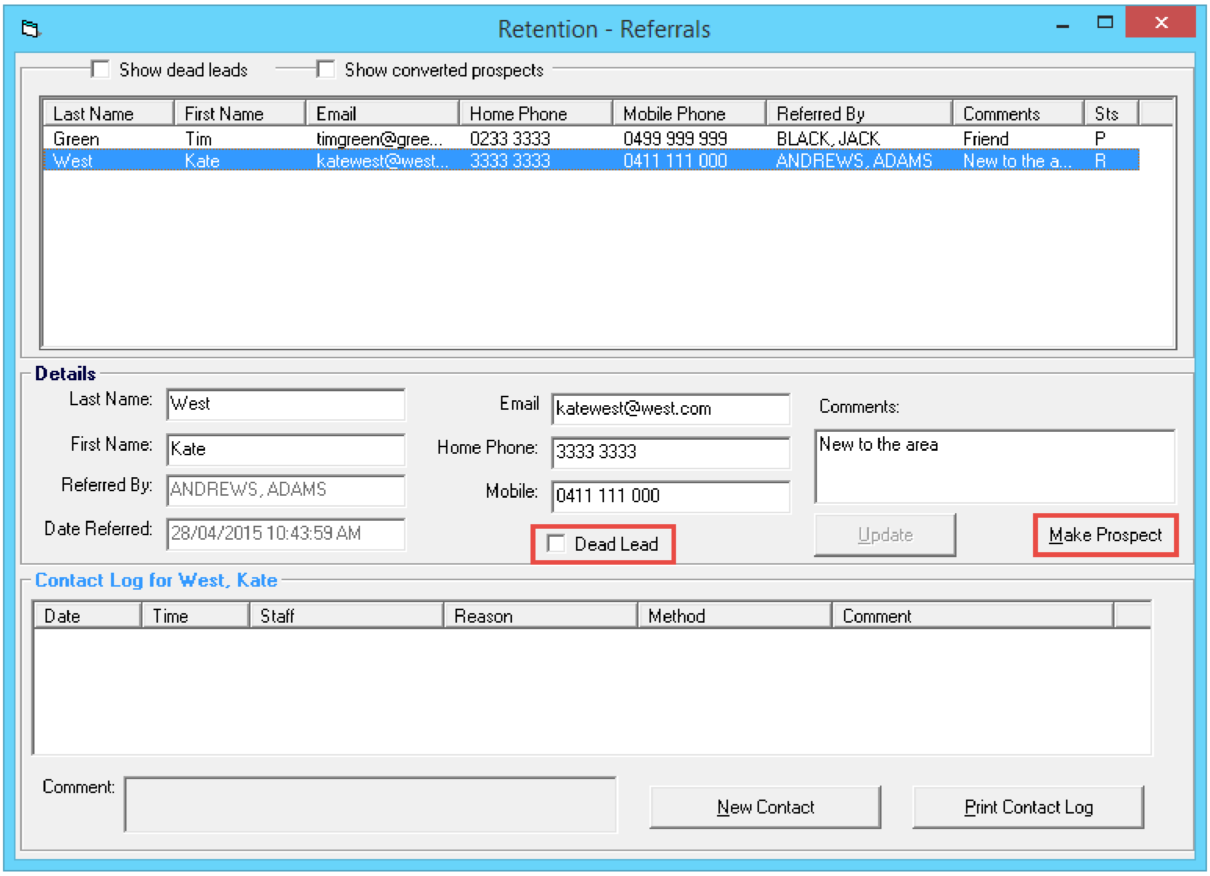
Converting Referrals to Prospects

Members> Retention> Referrals

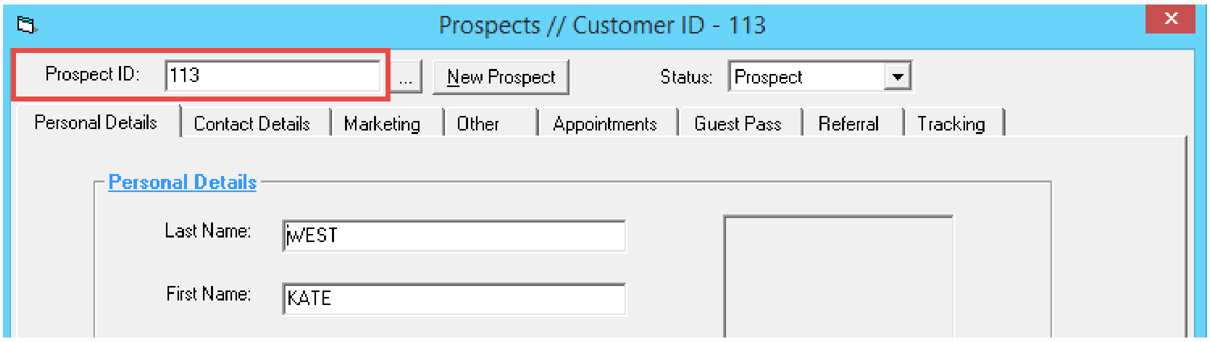
Any referral made by all members will display in the screen below. You have the option from this screen to either convert the referral to a prospect or mark as a dead lead.

To convert the referral to a prospect:

1. Highlight the referral and click [Make Prospect]
2. After converting this referral to a prospect in Members > Retention > Referrals this will create a customer ID for the referral



3. Prospects can now be sold a membership using the customer ID from when the referral was converted to a prospect



Converting Referrals to Dead Leads

Members> Retention> Referrals

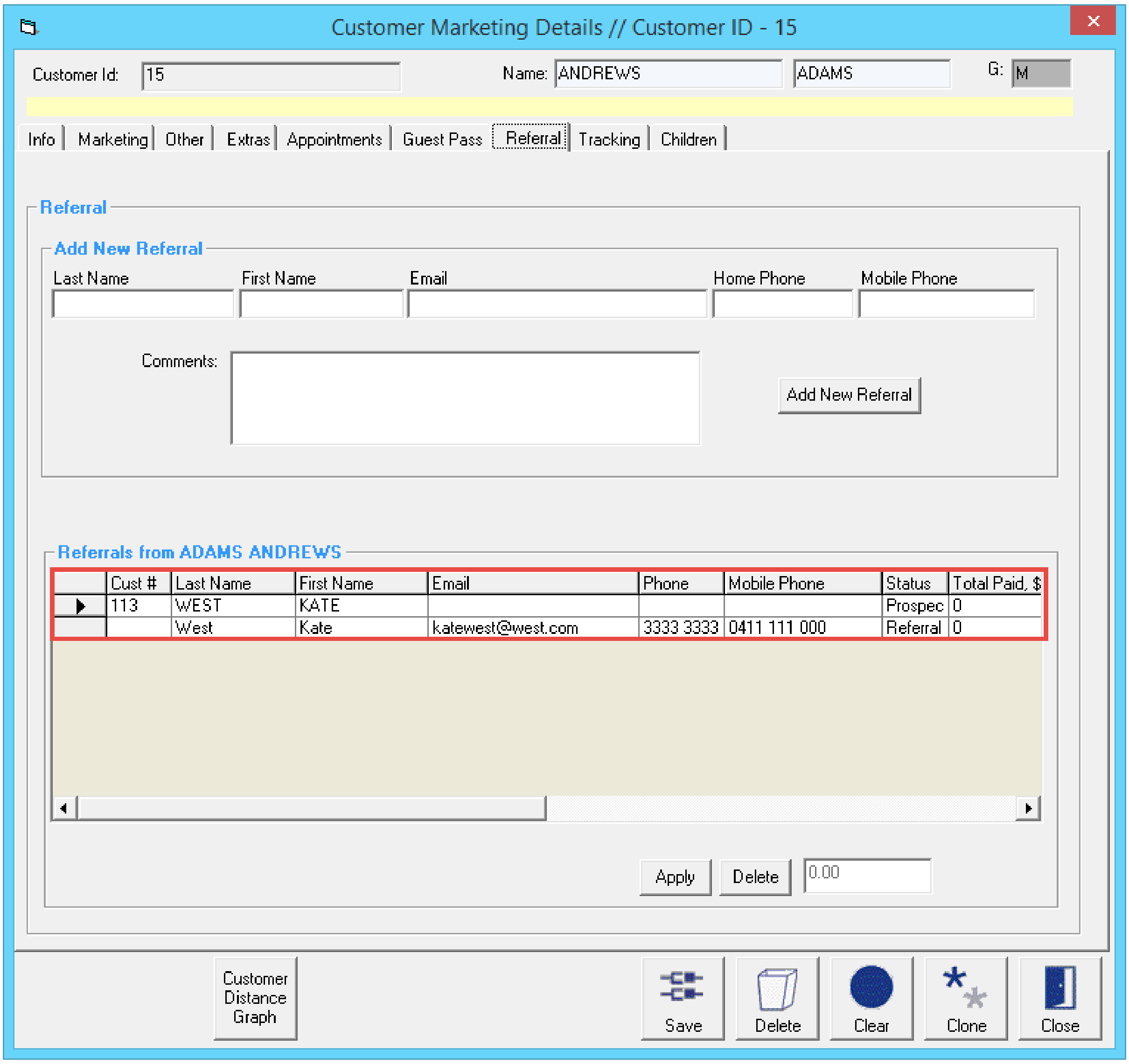
1. Highlight the referral and select ‘Dead Lead’

Tracking Members Referrals

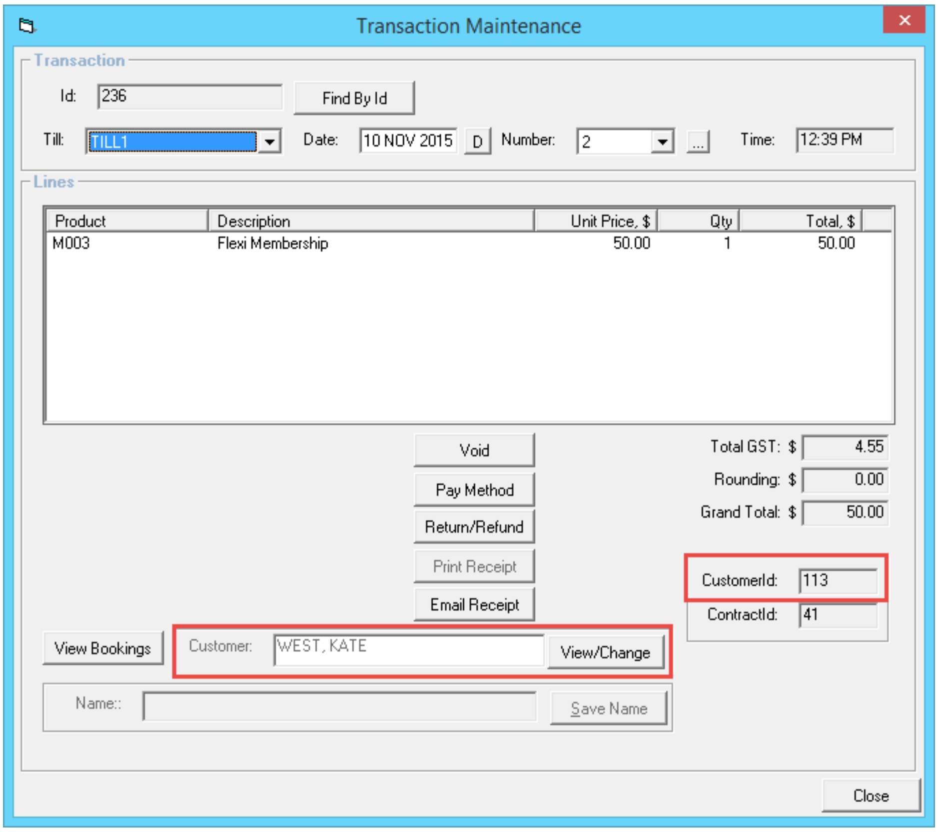
Members> Contracts> View Customer Contract

1. From the Membership Visits screen search for the member by either:
    a. Typing their Customer ID or surname and hitting enter
    b. Scan their card
    c. Selecting the [...] button
1. Click the [Marketing Info] button and open the Referral tab

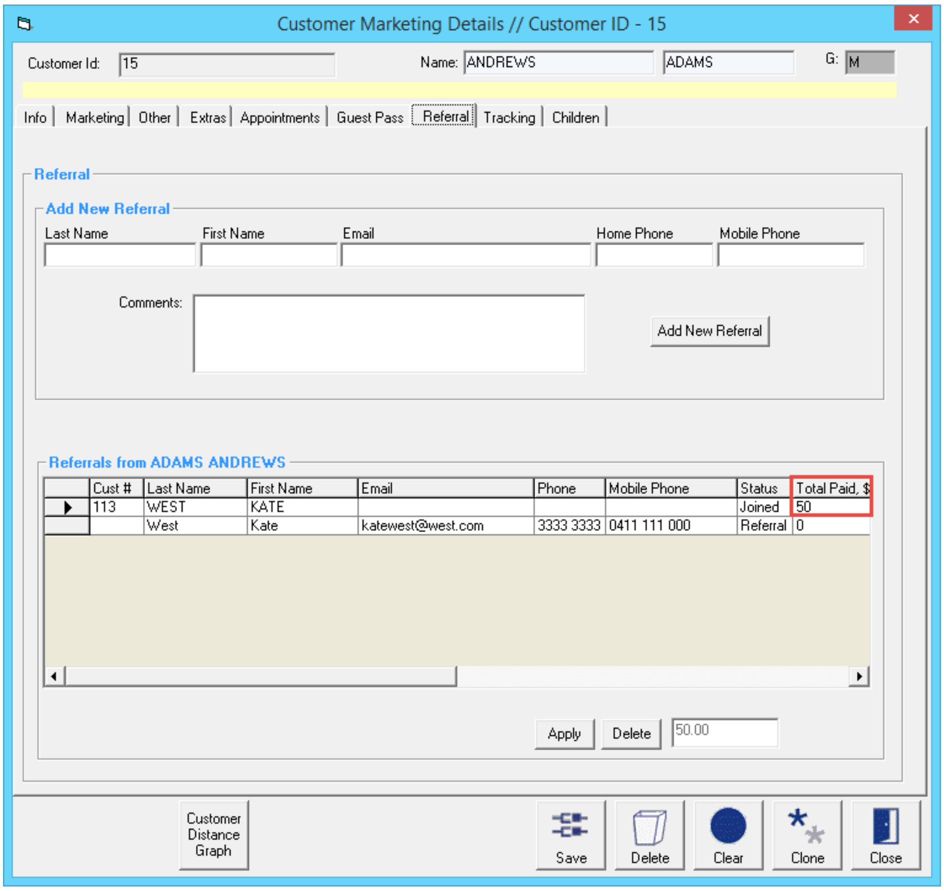
2. Once the referral has been marked as a prospect the customer ID will be automatically updated



3. Additionally, any time that this referred customer spends money at your facility and their customer ID is included in the transaction, this ‘Total Paid $’ amount will update with the value of their spend



4. When you view the member's Referral tab the 'Total Paid $' is updated accordingly



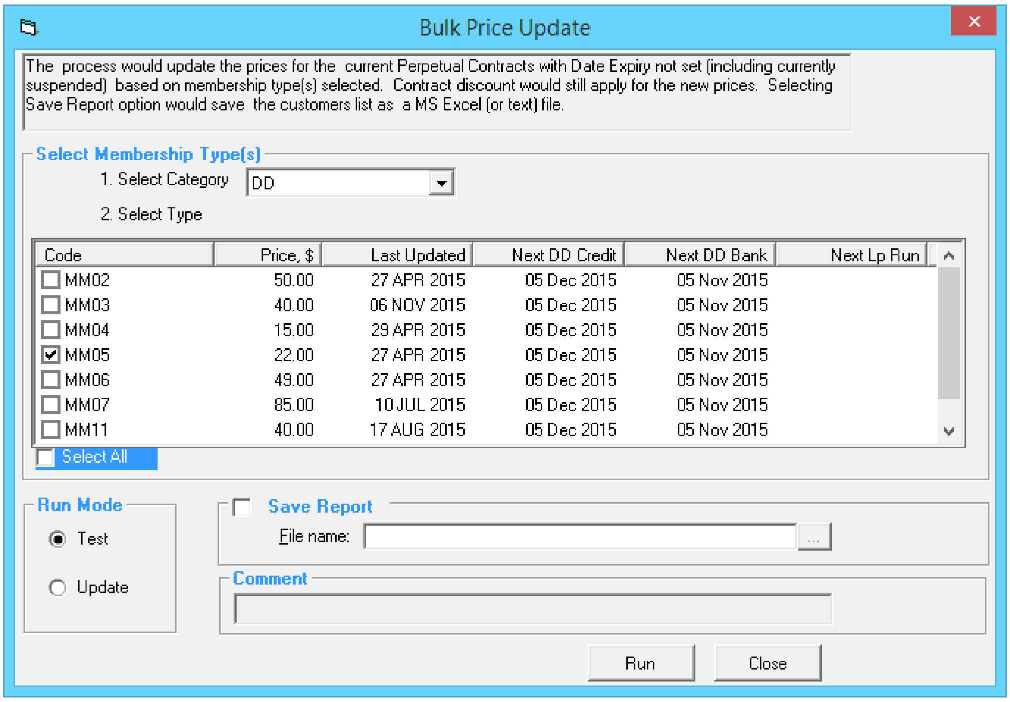
Bulk Processes

Bulk Price Update

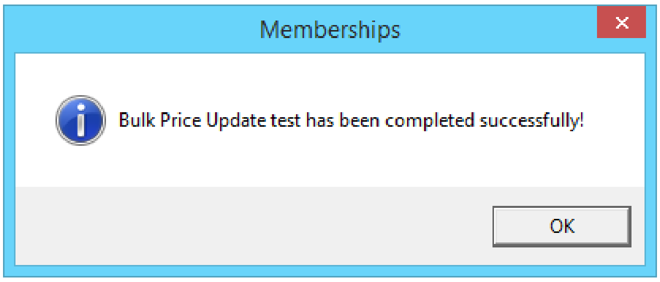
Members> Bulk Processes> Price Update

This provides for the bulk update of the price of individual perpetual membership types or all perpetual membership types with no set expiry date, at the one time. The price that displays in this field originates from the setup process in the Admin Module.

Once this process is run all prices for that particular membership are updated at the same time.



1. Select the membership category from the 'Select Category' drop down menu
2. Select the membership type, either individually or tick 'Select All'
3. Select the Run Mode, either 'Test' to complete a trial run or 'Update' to execute the price change
4. To save a report ensure the 'Save Report' box is ticked and browse for a nominated folder where the report will save as a Microsoft Excel file or Text file
5. Select [Run] and you will be informed once the update has been completed successfully

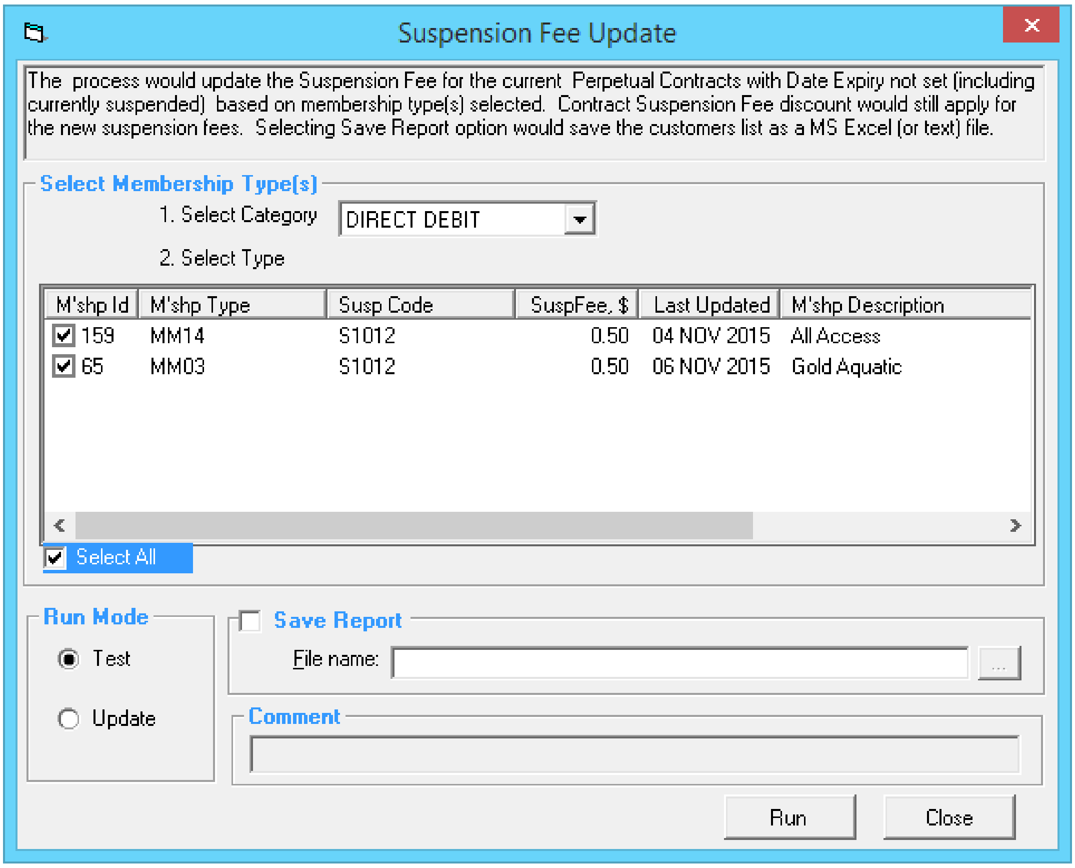


6. Select [OK] and you will be asked if you wish to bulk message those whose contracts that were effected, select [Yes] or [No]

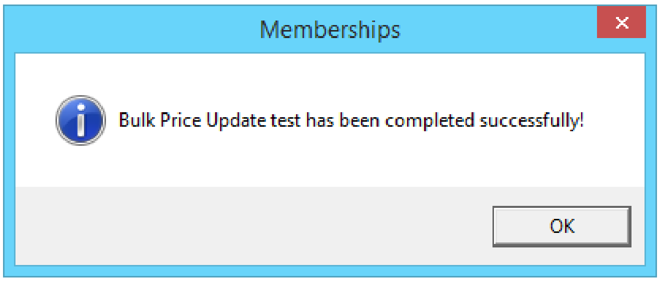
Bulk Suspension Fee Update

Members> Bulk Processes> Suspension Fee Update

This provides for the bulk update of the suspension fees of individual perpetual membership types or all perpetual membership types with no set expiry date, at the one time. The price that displays in this field originates from the setup process in the Admin Module.



1. Select the membership category from the ‘Select Category’ drop down menu
2. Select the membership type, either individually or tick ‘Select All’
3. Select the Run Mode, either ‘Test’ to complete a trial run or ‘Update’ to execute the price change
4. To save a report ensure the ‘Save Report’ box is ticked and browse for a nominated folder where the report will save as a Microsoft Excel file or Text file
5. Select [Run] and you will be informed once the update has been completed successfully



6. Select [OK] and you will be asked if you wish to bulk message those whose contracts were updated, select [Yes] or [No]

Bulk Suspension

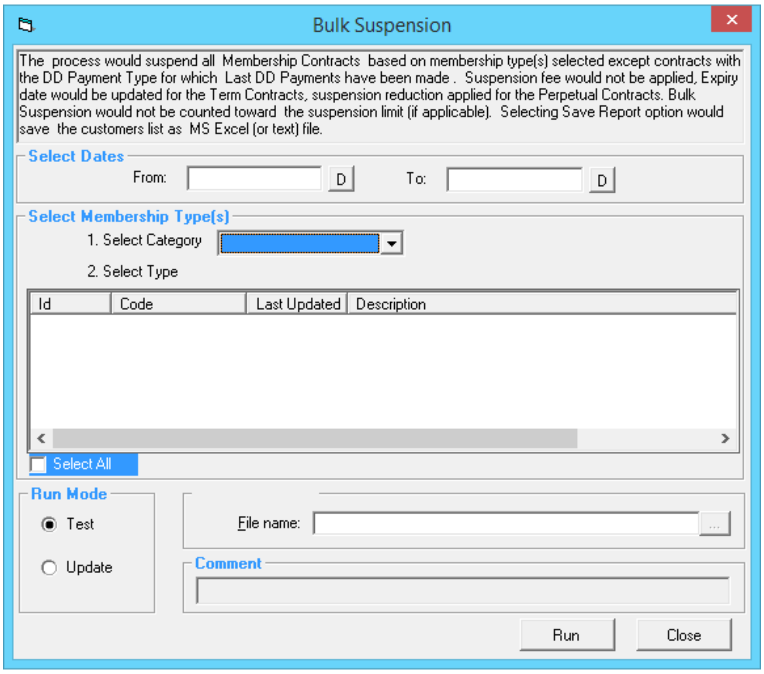
Members> Bulk Processes> Suspension

This allows for the bulk suspension of membership contracts for a particular membership type or types. However it would not include those membership contracts for which 'Last Direct Debit Payment' has been selected.

Expiry dates on upfront contracts will be amended to include the length of the suspension period.

Bulk suspensions do NOT count toward the suspension limits (if applicable).

Suspension fees will not be applied as it is a bulk suspension generated by the business that is enforced on multiple members.



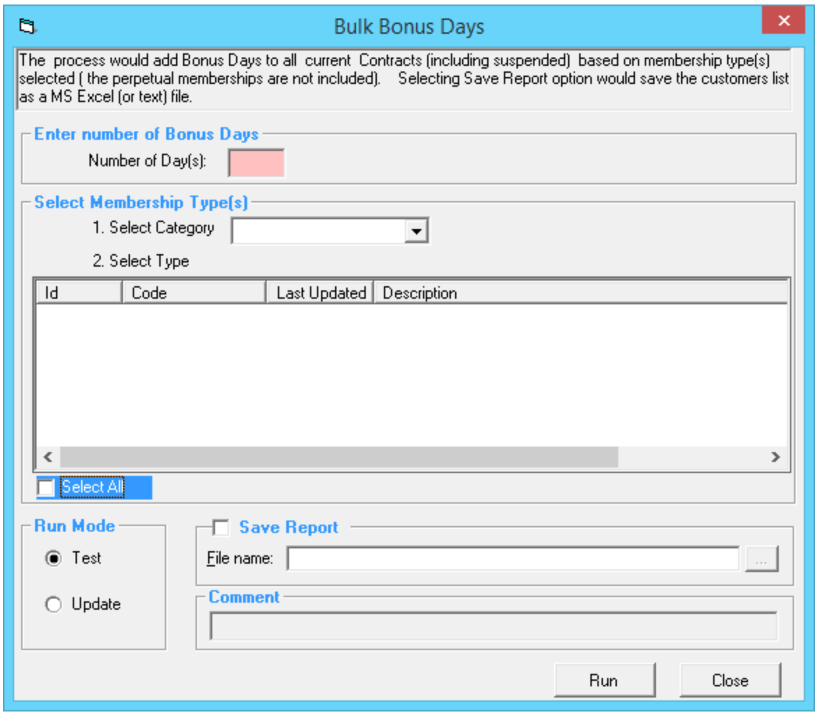
1. Enter the from and to dates that the suspension will run between
2. Select the membership category from the 'Select Category' drop down menu
3. Select the membership type, either individually or tick 'Select All'

4. Select the Run Mode, either 'Test' to complete a trial run or 'Update' to execute the price change
5. To save a report ensure the 'Save Report' box is ticked and browse for a nominated folder where the report will save as a Microsoft Excel file or Text file
6. Select [Run] and you will be informed once the update has been completed successfully
7. Select [OK] and you will be asked if you wish to bulk message those whose contracts were updated, select [Yes] or [No]

Bulk Bonus Days

Members> Bulk Processes> Bonus Days

Allows for the addition of bonus days to membership contracts (excluding perpetual contracts) based on the Membership Type selected.

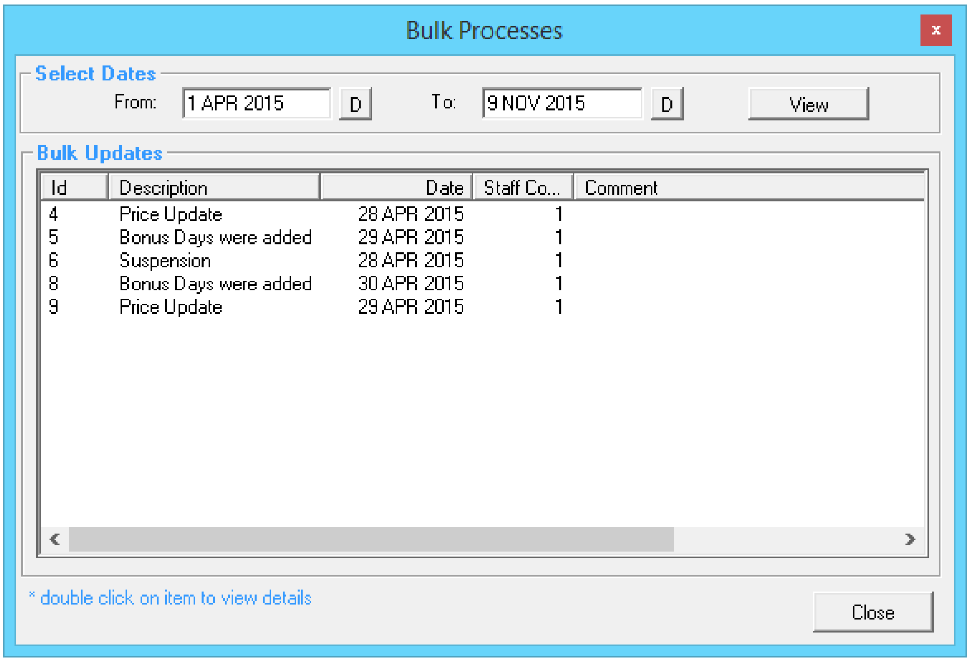


1. Enter the 'Number of Days' to be added to upfront membership types selected
2. Select the membership category from the 'Select Category' drop down menu
3. Select the membership type, either individually or tick 'Select All'
4. Select the Run Mode, either 'Test' to complete a trial run or 'Update' to execute the price change
5. To save a report ensure the 'Save Report' box is ticked and browse for a nominated folder where the report will save as a Microsoft Excel file or Text file
6. Select [Run] and you will be informed once the update has been completed successfully
7. Select [OK] and you will be asked if you wish to bulk message those whose contracts were updated, select [Yes] or [No]

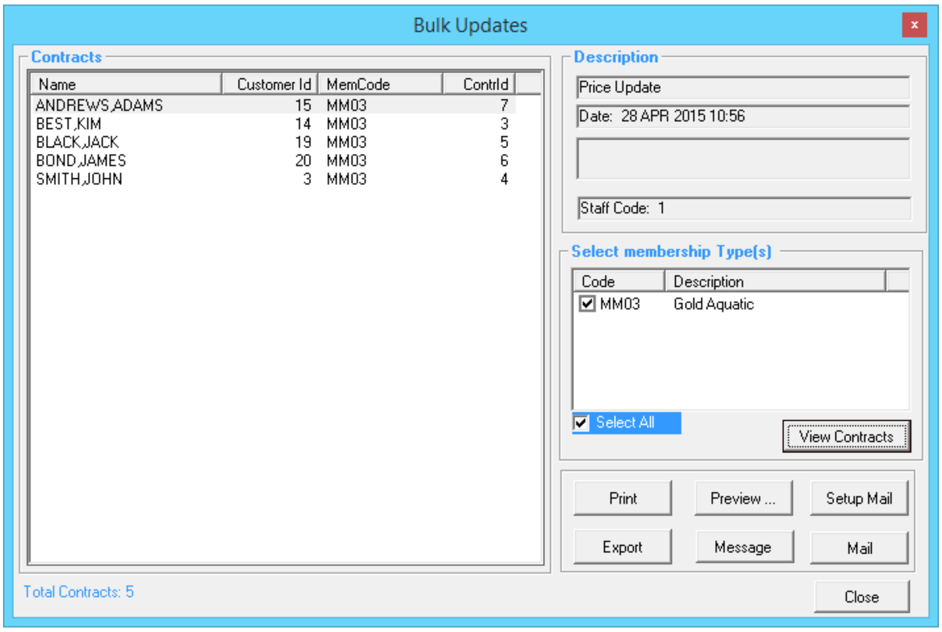
Bulk Process History

Members> Bulk Process> View History

This allows you to view any bulk processes that have been completed.



By double clicking on a bulk update line it will allow you to view the contracts that have been affected.



Select the membership type individually or 'Select All', then select 'View Contracts'. All memberships that were affected by the update will appear; you then have the ability to export, print, message or mail customers affected.