

Use this guide to to manage and sell your Memberships.

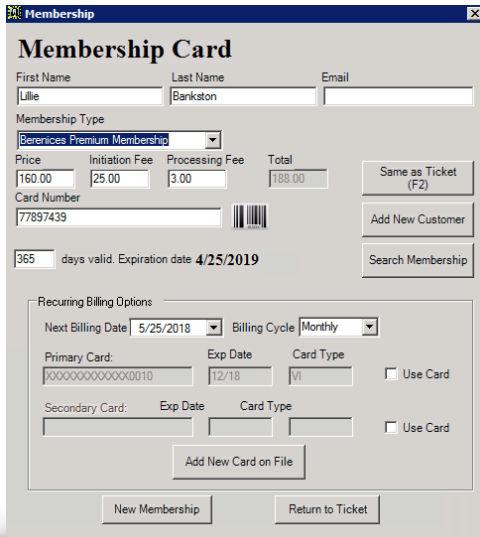
Selling a Membership

1. From the Customer's open ticket, press the F7 key or click the See More button and choose membership.
2. Enter the first and last name of the guest. The name on the ticket is typically the same as the name on the membership, so you can simply press F2 or click on the Same as Ticket button.
3. From the Membership Type drop down menu select the membership.
4. The system will automatically fill Price, Initiation Fee, Processing Fee, Card Number and Days valid.
5. Check Use Card next to an existing Card on File to use for recurring billing. If no card on file is present, you can add a new card on file.
 - Click Add New Card on File.
 - Click Add next to Primary Account or Secondary if you would like to add an additional card on file.
 - Enter your staff password.
 - Click Add New.
 - Swipe or insert chip card into your EMV Pin Pad.
 - The system will save the card information.
6. Click New Membership.
7. Enter a staff in the Staff1 field on the ticket.
8. Select a payment type and click the Process Ticket button.

Editing a Membership

Follow these steps to change the customer, expiration date, suspend, cancel a membership or manually bill a client.

1. From the SalonBiz® menu bar, click on the Ticket icon.
2. From the 'View List' drop down menu, click on Memberships.
3. From the 'Filter By' drop down menu, click on Open.
4. Locate the membership to edit and select it by double-clicking.
5. Change the customer assigned to the membership by clicking the search button, then search by the new customer's first and last name or phone/email. Click on the customer and then click Select.
6. Select 'Yes' to "Are you sure you want to change the customer on this membership to...?"
7. Change the membership expiration date or select No Expiration.
8. Change the Next Billing Date or Next Billing Cycle if needed.
9. Check the box next to Cancel to cancel the membership.
 - The membership can be renewed later if needed.
10. Select Bill now to manually bill a customer before their next billing cycle. Click 'Ok' to the Successful Billing pop up.
11. Click Close to exit the membership edit.



Membership Card

First Name: [Lille] Last Name: [Bankston] Email: []

Membership Type: [Berenices Premium Membership]

Price: 160.00 Initiation Fee: 25.00 Processing Fee: 3.00 Total: 188.00

Card Number: 77897439

365 days valid. Expiration date: 4/25/2019

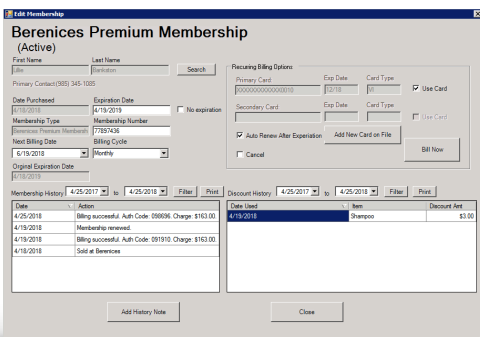
Recurring Billing Options:

Next Billing Date: 5/25/2018 Billing Cycle: Monthly

Primary Card: [XXXXXXXXXXXX0010] Exp Date: 12/18 Card Type: VI Use Card

Secondary Card: [] Exp Date: [] Card Type: [] Use Card

Buttons: [New Membership] [Return to Ticket]



Edit Membership

Berenices Premium Membership (Active)

First Name: [Lille] Last Name: [Bankston] Search: []

Primary Contact: (303) 345-1035

Date Purchased: 4/19/2018 Expiration Date: [] No expiration:

Membership Type: [Berenices Premium Membership] Membership Number: 77897439

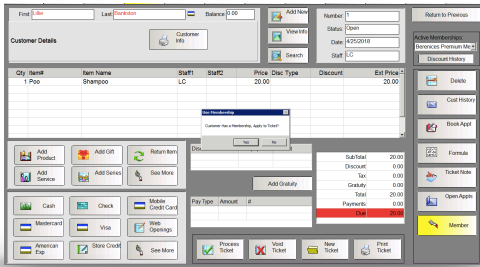
Next Billing Date: 5/19/2018 Billing Cycle: Monthly

Original Expiration Date: 4/19/2018

Membership History: 4/25/2017 to 4/25/2018 [Filter] [Print] Discount History: 4/25/2017 to 4/25/2018 [Filter] [Print]

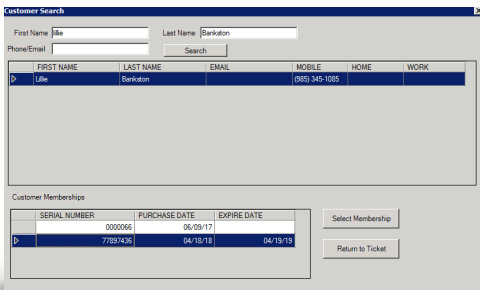
Date	Action	Amount	Discount Net
4/25/2018	Bill successful Auth Code: 09906 Charge: \$161.00		
4/19/2018	Membership renewed		
4/19/2018	Bill successful Auth Code: 091910 Charge: \$163.00		\$3.00
4/19/2018	Sold as Service		

Buttons: [Add History Note] [Close]



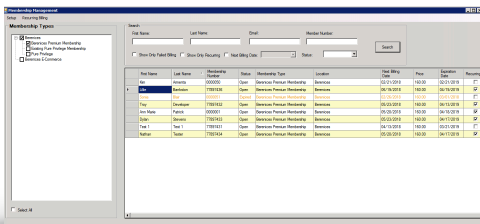
Using a Membership

1. Whether your member is checking out from a service or you are creating a product only ticket you will immediately notice the membership color of the first and last name on the ticket.
2. Proceed to scan all products and add any other services to the ticket.
3. Click the Member button.
4. Answer 'Yes' to the message "Customer Has a Membership, Apply to Ticket?"
5. The discount will automatically enter in the Disc Type field and adjust the price accordingly.
6. Select a payment type.
7. Click the Process Ticket button!



Renewing a Membership

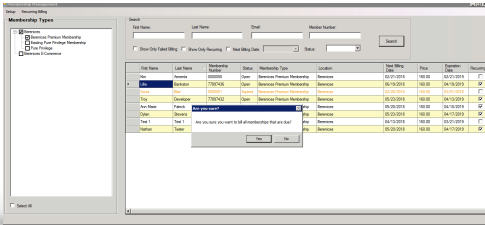
1. From the Customer's open ticket click the See More button and choose membership.
2. Enter the first and last name of the guest. The name on the ticket is typically the same as the name on the membership, so you can simply press F2 or click on the Same as Ticket button.
3. Click Search Membership
4. Search by the customer's first and last name or phone/email and click Search.
5. Select the membership to renew from Customer Memberships and click Select Membership.
6. Update or Add New Card on File if needed.
7. Check 'Use Card' next to the card on file you wish to use for recurring billing.
8. Click Renew Membership.
9. Enter a staff in the Staff1 field on the ticket.
10. Select a payment type and click the Process Ticket button..



Membership Management

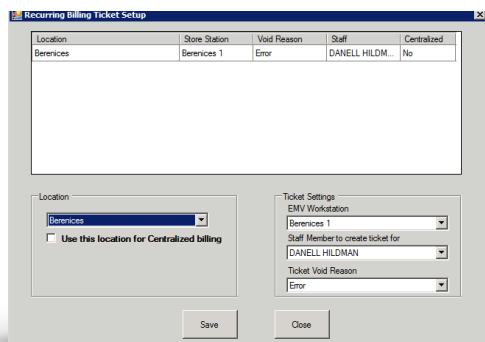
Follow these steps to view expired memberships, view failed billings and view status of membership.

1. From the SalonBiz® menu bar, click on SB Launcher (lightbulb) icon.
2. Select Membership Management.
3. Select the membership from the left Membership Type panel.
4. Search by first name, last name, email, membership or status.
 - Select additional filter options such as 'Show Only Failed Billings', 'Show Only Recurring' or 'Next Bill Date'..



Recurring Billing

1. Whether Follow these steps to manually bill all overdue clients or bill individual clients
2. To bill all overdue clients from the Membership Management screen select 'Recurring Billing' from the top left corner.
3. Select 'Bill All Due'
4. Select Yes to the pop up 'Are you sure you want to bill all memberships that are due?'
5. The charging window will appear and bill all customers that have a next billing date of the current date or before.
6. To bill an individual client search for the membership in the search field.
7. Double click the membership.
8. From the edit membership window select Bill now to manually bill a customer before their next billing cycle.
9. Click 'Ok' to the Successful Billing pop up.
10. Click Close to exit the membership edit.



Recurring Billing Ticket Setup

Follow these steps to setup where tickets are created for recurring billing and how they are managed.

1. From the Membership Management screen select 'Setup' from the top left corner.
2. From the location drop down select the location you want to setup.
 - Check 'Use this location for Centralized billing' if this location needs to handle all billing and ticket processing for all recurring billing.
 - Un-Check 'Use this location for Centralized billing' if each individual location will have its own workstation to handle billing and ticket processing for recurring billing.
3. In Ticket Settings link the EMV Workstation that recurring billing will be processed on.
4. Select the default staff member to create tickets for.
5. Select the ticket Void Reason.
6. Click Save.
7. Repeat for all locations.
8. Select Close.