memberships

Take your customer service to another level by taking your customers to another level.

Creating a Membership
1. From the SalonBiz®/SpaBiz® menu bar, click on the Blueprints icon.
2. Click the Customer button.
3. In the Table to Edit box, highlight by clicking once on Membership Card.
4. Click on the Add button.
5. Type in the name of the membership.
6. Click on the Add button.
7. Type in the membership fee.
8. In the drop down menu select how often the fee is to be paid.
9. Enter in the number of days the membership is valid after the sale of the membership.
10. Type in the Product Discount Percentage.
11. Type in the Service Discount Percentage.
12. From the drop down menu choose a color to display the customers associated with the membership.
13. Click the Return to Previous Screen button.
14. Click OK to the message "Discount being added for Membership!"

Selling a Membership
1. From the SalonBiz®/SpaBiz® menu bar, click on the Ticket icon.
2. Click the New Ticket button.
3. Type in the customer's first and last name. Select the customer from the Search for Customer box.
4. Press the F7 button on your keyboard.
5. Enter the first and last name of the customer. If the name on the ticket is the same as the name on the membership, simply click the Same as Ticket button.
6. Enter the card number in the Card Number field.
7. From the Membership Type drop down menu select the membership.
8. The price will automatically post in the Price field.
9. The days valid will automatically post. Double check the expiration date.
10. Click the New Membership button.
11. Enter a staff in the Staff1 field on the ticket.
12. Select a payment type and click the Process Ticket button.

Editing a Membership

Follow these steps to change the customer that a membership is assigned to, the expiration date of a membership, or the membership number.

1. From the SalonBiz®/SpaBiz® menu bar, click on the Ticket icon.
2. From the 'View List' drop down menu, click on Memberships.
3. Locate the membership needing editing and select it by double-clicking on it with the left mouse button.
4. You can then edit the customer that the membership is assigned to, the expiration date, or the membership number. Click the 'Return to Previous Screen' button to go back to the list of memberships.

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 SalonBiz®/SpaBiz® menu bar, click on the Ticket icon.
2. Click the New Ticket button.
3. Type in the customer's first and last name. Select a customer from the Search for Customer box.
4. Press the F7 button on your keyboard.
5. Enter the first and last name of the customer. If the name on the ticket is the same as the name on the membership simply click the Same as Ticket button.
6. Enter the card number to be renewed in the Card Number field.
7. Click the Search button.
8. In the Choose a Member box verify name and member number click the Select button.
9. The Membership Type field will automatically enter the membership.
10. The price will automatically post in the Price field.
11. The days valid will automatically post. Double check the expiration date.
12. Click the Renew Membership button.
13. Enter a staff in the Staff1 field on the ticket.
14. Select a payment type and click the Process Ticket button.