Membership Setup
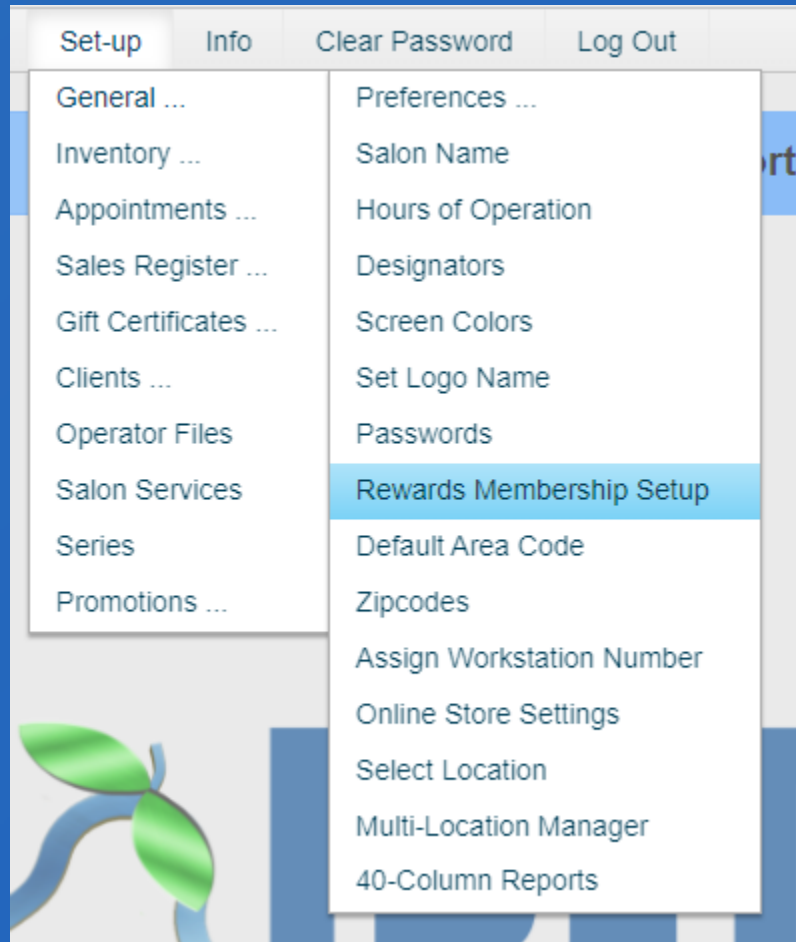
1.   From the main screen select Setup/General/Rewards Membership Setup.

The following screen will appear:

2. Under "Membership Type" enter the name of the Membership you will offer to your customers. This can be any name you'd like. We chose "Gold" for this example, but you may have VIP, or Platinum, or anything that suits you. Then put in the "price" that you will initially charge the customer for the privilege of joining your membership. Please note that the price may be "0.00" if you choose. This would mean that the customer can start for "free". However, they may still be charged a weekly, or monthly, or annual fee for their membership, or nothing at all. This will be up to you.

3. Under "Billing Options" you'll decide if you are charging a recurring fee and how often that fee gets charged.

Billing Options

A Billing Amount   25.00

B Billing Cycle   MONTHLY ▼

C Billing Date   1st of Month ▼

D Charge Suspension Fee of   0.00

A- Billing Amount – this is the amount of the recurring fee (if any.)
B- Billing Cycle – using the drop-down menu you can choose from "Weekly", "Monthly", "Semi Annually (every six months) ", or "Annually." This is how often they will be charged the amount you place in "Billing Amount".
C- Billing Date – using the drop-down menu you can choose from "First of the Month", "15th of the Month", or "Last day of the Month."
D- Charge Suspension Fee of – enter a dollar amount here to charge the customer a flat fee if they choose to "suspend" their membership. For example. You have an annual membership that a customer is part of. Their membership runs from January through December. However, the customer informs you that they will be out of the state for the entire summer, from June 1st through August 31st. You can "suspend" their membership for those three months for a flat fee and the time they were suspended for would be added to the time that their membership would have normally expired. In this example, instead of expiring on December 31st, it would expire March 31st.

4.   Discount Options

A-Discount Service - If you are offering discounts to your clients that own this particular membership you must activate this field then place the number under "amount" that it will be discounted by. You will then choose if that number represents a:

B-By Percentage – This toggle will make the discount in the "Amount" field a percentage if activated.

C-By Flat Amount - This toggle will make the discount in the "Amount" field a flat dollar amount if activated.

D-No Effect on Commission – by activating, this discount will not impact service provider commissions.

E, F, G, and H are all Identical to A through D. However, they focus on RETAIL rather than services.

I-Comp Service – By activating you can then use the drop-down menu to choose any service from your menu and this service will be given to your active members at no charge, no matter how often they use it.

5. Points Options

Points Options

A	Membership Earns Points	(on)
B	Additional points earned on service	0
C	Apply Additional Ratio on Service points	00.00
D	Additional points earned on Retail	0
E	Apply Additional Ratio on Retail points	00.00

A-Membership Earns Points – By activating this feature you are attaching the "points" program that you initially set up to this Membership. The customer will earn NO points if this is not activated, even if you have created a "points" program. Some memberships can earn points, while you may decide that others don't.

B-Additional points earned on service – by activating you are applying additional points based on the number selected here. For example, if you placed a "5" in this box, the customer may have normally earned 100 points for a $100 service, but with this feature the customer would earn 105 points because you have stated they will earn an additional 5 points on top of the earnings class you had set up.

C-Apply Additional Ratio on Service points - This changes the earned points from a set amount to a different ratio. For example, if you placed a "2" in this box, it would multiply the earned points by "2." So, a $100 service that earns one membership 100 points, would earn 200 points instead. If you changed the ratio to a "3" the customer would earn 300 points on the same service. This feature allows you to have your VIP customers earn faster than standard customers. Fractions are also allowed. For example, "1.5" would be 150 points for the same $100 service.

D and E are identical to A and B but apply to retail, rather than services.

6.   Service Earnings Options

Allows your customers to earn a free service from you each time they renew their membership. Please note that this requires that you are charging their credit card through the software and NOT through a third party.

A-Frequency – Using the drop-down menu you can choose between Weekly, Monthly, Semi Annually, or Annually. This is how often their card will be charged for renewal, allowing them to earn B through H.

B-Qty – Quantity is the number of free services (the same service only) the customer will earn by renewing their membership.

C-Service – Choose the service they will earn by renewing.

D-Value $ - This field will populate itself and will be the dollar amount that the business charges for this service. This is important because of "H" which we will discuss shortly.

E-Earns in Month of Purchase – if activated the customer earns the free service(s) upon purchasing the membership and does not have to wait for renewal.

F-Services Accumulate – If this is not activated and a customer earned a single "pedicure" with their renewal, each renewal any pedicures they earned but did not use will no longer be available to them. However, if it is activated, they may continue to earn the free pedicures upon each renewal and they are available for use at any time. So, as an example, if a customer earns a new pedicure every month, and has not used any of them, and this is activated, they will have 6 pedicures at their disposal to use at any time. If it is NOT activated, the customer will have 1 available whether or not they used the others.

G-Can be redeemed in half values – Imagine that the customer has earned a free 60-minute massage, if this feature is activated, they can turn that into TWO 30-minute massages instead.

H-Can be redeemed towards other services – one of the most popular features, this allows your customer to use the VALUE as shown in "D" rather than the service. This way, they may have earned a $100 Swedish Massage, but they may choose to use the $100 towards another service (s).

7. When done, click 'Save' in the top right corner.