

Sell Membership

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Sell Membership

Find Member > Add Individual (if necessary) > Access Account > Offerings

1. Find or add a member.
2. Add family members, if applicable.
3. Hover over **Offerings** and click **Membership**. Then, choose a membership type.
4. Click **Add** on the selected membership.
 - a. Change the start date if not today.
 - b. Select a modifier if applicable.
 - c. Select price frequency (monthly, quarterly, biannually or annually).
5. Click **Add**.
6. If Done (not adding additional programs or items), **Go to Cart**.
7. Review Information in the cart for accuracy (Dates, Branch, Amounts, Forms).
 - a. The Draft Date will default to the next closest draft date. If the member wants to change the draft date, Click **Recurring Billing** and Change the next sale date to the desired date. The pro-rate due today will be updated accordingly.
 - b. Forms - Complete any forms required. If an error message displays under forms (red triangle), return to the form to correct errors.
8. Click **Proceed to Checkout**.
9. Select Payment Method.
 - a. If none is selected, click **Change**. You can choose a payment method or add a new one. Proceed to Payment will appear if a new method needs to be added. Finish entries on this page before proceeding to Payment. This allows entry of the new payment method before finalizing the order.
 - b. If the recurring payment method differs from the cart, go to Recurring Billing > Payment Method and select it from the drop-down menu.
10. Enter a promo code in the promo code box, and click **Apply**, if applicable.
11. Click **Finalize Order**, then Click **Yes, Finalize my Order**.
12. Send Receipt.
 - a. Email (preferred) and Choose the correct address.
 - b. If a printed receipt is desired, click **Print** and select **Window Envelope**.
13. Return to Profile and click the **Profile link**.
 - a. Take member photo(s) if not on file. Click the Camera Icon under Profile Picture/Space and

click **Take Photo**.

b. Edit the Personal Info Access ID if not on file and add Bar Code (will change to Allow Access).
