PERSONAL TRAINING SALES & MANAGEMENT (WELCOME CENTER)

SELLING PERSONAL TRAINING: FULL RATE & FA

1. Open the **Customers** module
2. Search for and select the existing customer
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Membership**, select **Sell Membership**
6. Select the appropriate **Category** (Personal Training)
7. Change **Retention Eligible** option to **All**
8. Click **Search**
9. Select the appropriate package
10. For **Dates**, <u>do not change dates</u>
    a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
11. Under the **Automatic Renewal** section
    a. For **Payer**, select the customer who is the card or bank account holder (must be parent/guardian for Youth and Teen)
    b. Enter the desired payment method for automatic draft
12. Click **Submit**
13. Select or unselect members to be included in the package (if applicable)
    a. If you see the message below, the customer is not a member and is not eligible for Personal Training

       Has never had a membership in Category: Adult or has never had a membership in Category: Corporate or has never had a membership in Category: Family or has never had a membership in Category: Teen or has never had a membership in Category: Y Employee or has never had a membership in Category: Youth
14. Click **Submit**
15. Answer any custom questions (if applicable) and prompt customer to agree to waivers
16. Click **Submit**
17. Review transaction details for accuracy
    a. **Note:** If you need to make a change to the package type or customer, click **Membership Sale** under **Action** and select what needs to be modified and follow prompts/steps above
18. Click **Pay**
19. Select Payer from **Potential Customers** list and click **Select**

SELLING PERSONAL TRAINING: FULL RATE & FA (Cont.)

20. Enter payment method (cash, check, or credit card only)
    a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
21. Click **Pay and Finish**
22. Email a copy of the receipt to your branch's Wellness Director and/or team member(s) responsible for Personal Training management

TRANSFERRING A PERSONAL TRAINING PACKAGE

For members who wish to increase or decrease their number of weekly sessions

1. Open the **Customers** module
2. Search for and select the existing customer
3. Go to the **Actions** tab
4. Under **Transactions/Schedule Actions**, select **Membership Inquiry**
5. Select the **Pass Number** for the Personal Training package
6. Under the **Package** section, click **Transfer packages**
7. Enter any applicable notes needed in the **Staff Notes** section
8. Click **Refund**
9. Select the appropriate **Category** (Personal Training)
10. Change **Retention Eligible** option to **All**
11. Click **Search**
12. Select the appropriate package
13. For **Dates**, <u>do not change dates</u>
    a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
14. Under the **Automatic Renewal** section
    a. For **Payer**, select the customer who is the card or bank account holder (must be parent/guardian for Youth and Teen)
    b. Enter the desired payment method for automatic draft
15. Click **Submit**
16. Select or unselect members to be included in the package (if applicable)
17. Click **Submit**
18. Answer any custom questions (if applicable) and prompt customer to agree to waivers
19. Click **Submit**
20. Review transaction details for accuracy
    a. **Note:** If you need to make a change to the package type or customer, click **Membership Sale** under **Action** and select what needs to be modified and follow prompts/steps above
21. Click **Pay** (or **Refund** if member is getting a credit back)
22. Select Payer from **Potential Customers** list and click **Select**

TRANSFERRING A PERSONAL TRAINING PACKAGE (Cont.)

For members who wish to increase or decrease their number of weekly sessions

23. Enter payment method (cash, check, or credit card only) or refund method (Refund to Account only)
    a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
24. Click **Pay and Finish** (or **Refund and Finish**)
25. Email a copy of the receipt to your branch's Wellness Director and/or team member(s) responsible for Personal Training management

RENEWING PERSONAL TRAINING

1. Open the **Customers** module
2. Search for and select the desired customer
3. Go to the **Actions** tab under the member who's membership is being transferred
4. Under **Transactions/Schedule Actions**, select **Membership Inquiry**
5. Select the pass number for the appropriate package
6. Under the **Membership** section, select **Renew Membership**
7. Click **Submit**
8. For **Dates**, <u>do not change dates</u>
    a. **Time Periods** can be changed cases where a customer would like to purchase membership multiple months/years
9. Under the **Automatic Renewal** section (If applicable)
    a. For **Payer**, select the customer who is the card or bank account holder (must be parent/guardian for Youth and Teen)
10. Enter the desired payment method for automatic draft
11. Click **Submit**
12. Select or unselect members to be included in the package (if applicable)
    a. **Note:** Make sure the customer selected as **Primary** is the Payer for a family-type package, child/adult for individual unless an alternate family member qualifies the family for a discount
13. Click **Submit**
14. Answer any custom questions (if applicable) and prompt customer to agree to waivers
15. Click **Submit**
16. Review transaction details for accuracy
    a. **Note:** If you need to make a change to the package type or customer, click **Membership Sale** under **Action** and select what needs to be modified and follow prompts/steps above
17. Click **Pay**
18. Select Payer from **Potential Customers** list and click **Select**
19. Enter payment method (cash, check, or credit card only)
    a. For cash, enter exact amount being given and ACTIVE Net will calculate the change
20. Click **Pay and Finish**

UPDATING PERSONAL TRAINING DRAFT INFORMATION

1. Open the **Customers** module
2. Search for and select the desired customer
3. Go to the **Actions** tab
4. Under **Transactions/Schedule Actions**, select **Membership Inquiry**
5. Select the pass number for the appropriate package
6. Under the **Automatic Renewal** section make necessary changes (change Payer and/or add new/change payment method)
7. Click **Submit Renewal Changes**