



# **PROMOTIONAL/TRIAL MEMBERSHIP SALES**

# HORIZON BCBS OF NEW JERSEY TRIAL

1. Open the **Customers** module
2. Search for and select the customer
3. Go to the **Actions** tab
4. Under **New Transactions**, select **New Receipt**
5. Under **Membership**, select **Sell Membership**
6. For **Category**, select **Promotional**
7. For **Retention Eligible**, change to **Non-eligible Membership Only**
8. Click **Search**
9. Select the appropriate package
10. For **Dates**, do not change dates or time periods
11. Leave as **Do not automatically renew**
12. Click **Submit**
13. Select or unselect members to be included in the package (if applicable)
14. Click **Submit**
15. Under the **Coupons** section, enter the coupon code **BCBS Trial** and click **Apply**
16. Answer any custom questions (if applicable) and prompt customer to agree to waivers
17. Click **Submit**
18. Click **Finish**