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GENERAL MEMBERSHIP SERVICE TYPE

This new service type will allow you to set up your membership services so that they function based on the settings that you are using in the Member Tracking System™.

Add Service

Service Name: Service Abbr: (max 10 characters)

General Enrollment - Member becomes an Enrolled Member.

Choose Service Type

- General Membership
- Recurring Billing - Based on Daily Rate
- Recurring Billing - Monthly Flat Fee
- One Time Payment
- Drop-In
- Fixed Price
- Free

When you add a new service and choose the General Membership service type, the system will pull the settings in the Unit Information Expiration Date Calculation Method for the unit that you are in and accordingly create the membership type as either Fixed Expiration Date or Variable Expiration Date – NO MORE CALENDAR DATE SETUP REQUIRED! This Service type will charge the parent just like a fixed price type of service.

Unit Information

Find Unit Code:

General | Comment/Directions | Activity Locations | Date Validations | School Years | Goals | Credit Card Config | MTS Notify Activities

Organization Club of Anytown

PLEASE NOTE: Unit Information MUST be set up at each Unit. This information is part of the data file and will be copied from each of the satellite units to the main office when the Backup Data to Disk and Import Data from Disk Procedures are performed. IT IS NOT NECESSARY TO SET UP UNITS FOR ACTIVE/NON-ACTIVE MEMBERS OR ENROLLMENT PERIODS. Those fields are available on the Members form and all reports can be pulled by those fields.

Unit Code: The Unit Code must be between 2 and 4 Unique Characters
All Unit Codes MUST be UNIQUE to prevent possible data corruption

Unit Name: Unit Director:

Address: Staff: 35
City: State: Zip: Members: 827

Address 2: This is the way that your Members Expire
City 2: State 2: Zip 2: If everyone expires on 12-31 each year - choose Fixed
If each person gets 1 year from entry - choose Variable

Phone: Phone 2: Expiration Date Calculation Method

Fax: Fixed Expiration Date: Variable Expiration Date:

Email Address:

Website:

The Membership type will default to whatever you have set in the Parent Portal Admin/Settings but can be modified in the Parent Portal Configuration Tool to override the global settings, if you desire.

Home > Admin > Settings

PARENT PORTAL SETTINGS

PARENT PORTAL ACCESSIBILITY

- Block New Account Registration/Creation: Block new users from registering (or creating) new Parent Portal accounts.
- Restrict Login Access: Restrict Parent Portal login to admin/manager accounts only. All other users will not be able to log in.
- Restrict Enrollment: Disable member enrollment for all programs/services. Only Parent Portal admin/manager accounts will be allowed to enroll for services.

Membership Type: **Regular** Specifies which Membership Type in the Member Tracking System™ that will be assigned to members who enroll using the Parent Portal.

IMPORTANT: General Membership Service Type is now the **ONLY** Service type that will automatically write a Member Tracking System™ enrollment record for the member.

Enrollment History

Enrollment History for: Peter Pan 946 Unit: 05

HOW TO RE-ENROLL A MEMBER:

1. Add a **NEW** Entry Date, Expiration Date and Member Type on the **NEXT AVAILABLE LINE**
2. The system will default the member to a renewal if they have been enrolled previously
3. The system will fill in the Unit Code accordingly

NOTE: The Expiration Dates and Entry Dates must not overlap each other.
NOTE: All members should have an Entry and Expiration date.

Entry Date	Expiration	Type	New/Renewal	Unit Code
08/10/2017	05/24/2018	Regular	New	05
*				

Record: 1 of 2 of 2 > No Filter Search

[?](#) [Close](#)

If you want a Service that is NOT General Membership Type to write an enrollment record, you must turn on the flag for that Service's Default Values Tab to Generate a Membership Enrollment Record when this Service is selected.

Service Name: **Example Service 15 (Fixed Price)** Service Abbv: **E15-Fpric** (max 10 characters)

Drop-in - Participants pre-pay only for the days, weeks, or months that they choose to attend instead of paying for the entire service duration. This is intended for the occasional attendee. No charges are created upon enrollment allowing participants to be charged later based on attendance.

Choose Service Type

- General Membership
- Recurring Billing - Based on Daily
- Recurring Billing - Monthly Flat Fee
- One Time Payment
- Drop-In
- Fixed Price
- Free

Values for this Unit Only | **Default Values (All Units)** | Pre-Requisites

Service Description: Parent Portal Service Type: Fixed Price

Text Box Style

- Plain Text
- Rich Text

Participants are charged one single flat fee, and they are required to pay this fee in full up front to enroll. Capacities can be set that limit the number of participants that can enroll, and multiple rates and discounts with agreement disclaimers can be.

Generate a Membership Enrollment Record when this Service is Selected

Service Membership Type: Use Organization Default: Regular

Account Code: MEMB - Membership

Show this Service on the Parent Portal Website

- Upon Activation
- For a limited period of time Between: and:

Update Cancel

1. Membership Services default to the Fixed Expiration Date settings for the Unit in the Member Tracking System™ which means you do not have to define expiration dates in the Parent Portal Configuration Tool. However, you can override fixed expiration dates for a specific service in the Parent Portal Configuration Tool. Otherwise leave those fields blank.

Service Name: **Membership 2018-19** Service Abbv: **Memb18-19** (max 10 characters)

General Enrollment - Member becomes an Enrolled Member.

Choose Service Type

- General Membership
- Recurring Billing - Based on Daily
- Recurring Billing - Monthly Flat Fee
- One Time Payment
- Drop-In
- Fixed Price
- Free

Values for this Unit Only | **Default Values (All Units)** | Pre-Requisites

Service Description:

Text Box Style

- Plain Text
- Rich Text

Account Code:

Unit Membership Begin Entry Date:

Membership Fixed Expiration Date:

2. Variable Expiration Date memberships can start from the date of sign up or from the end of an existing membership.

The screenshot displays the 'Edit Unit Service Properties' interface. At the top, the 'Service Name' is 'Member365Now' and the 'Service Abbrev' is 'Memb365Now' (max 10 characters). Below this, the 'General Enrollment' note states 'Member becomes an Enrolled Member.' A 'Choose Service Type' section contains radio buttons for 'General Membership' (selected), 'Recurring Billing - Based on Daily', 'Recurring Billing - Monthly Flat Fee', 'One Time Payment', 'Drop-In', 'Fixed Price', and 'Free'. A tabbed interface below shows 'Values for this Unit Only' as the active tab. The 'Service Description' field is empty, with 'Text Box Style' options for 'Plain Text' and 'Rich Text'. The 'Service Membership Type' is set to 'Use Organization Default: Regular'. The 'Account Code' is 'MEMB - Membership'. The 'Variable Expiration Day Rule' dropdown is open, showing options: 'Extend From Start Date', 'Extend From Expiration Date', and 'Extend From Start Date'.