Adding a Service Type Explained

Functions-> Services-> Add Type

Service ID

- A 10 character field that the system uses to keep track of this service and any changes made to it.
- The ID itself can't be edited although all other fields can.
- No spaces or special characters are allowed. Only letters, numbers an underscore or dash can be utilized here.

Service ID Display

- This is the view the Administrator or Member will see when choosing a package for purchase.
- Only the first 30 characters are viewable.
- All special characters are allowed.

Description

- The long description is viewable upon purchase by members and administrators.
- Only the first 45 characters are viewable.
- All special characters are allowed.

Payment Frequency

- The price of the package will be divided up based on the pay frequency.
- Pay After Session will prompt you to take a payment after Done, No Show or Late Cancel is choosen in the appointment on the Schedule Matrix.

Price

- This is the TOTAL cost of the package.
- If it is a 12 month package with monthly payments you would put here the cost of all 12 months.
- A dollar sign DOES NOT need to be used.

First Payment Factor

- If more than the first payment period needs to be charged this can be set to 2. For instance, first and last month needs to be collected in the initial payment.

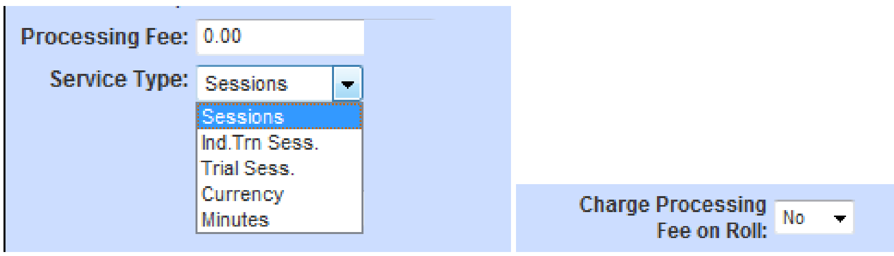
Author: Leslie Bechtel *Date Written: 1/17/2012*

Updated by: *Date Updated*

Version:1 *Doc Location: Knowledge Base*

Setting a Term

- The system adds months and days together.
- If term length is set to 0, a roll service will immediately roll.



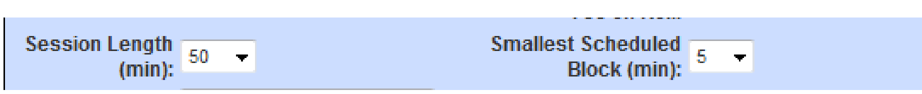
Processing Fee

- Allows a processing or initiation fee to be added to the initial payment of the package.
- You can choose whether or not to charge this when and if the package rolls.

Service Types

- Sessions- Most typical and tracks basic session usage.
- Ind Trn Sess. – Will not payout to payroll. Will not show on training reports.
- Trial Sessions – Great for use in Guest or Trial Packages. Gives the ability to track conversion from a trail package to a session package. Reports -> Training -> Trail Session Analysis. Will pay out to trainer payroll the Trial Rate only.
- 

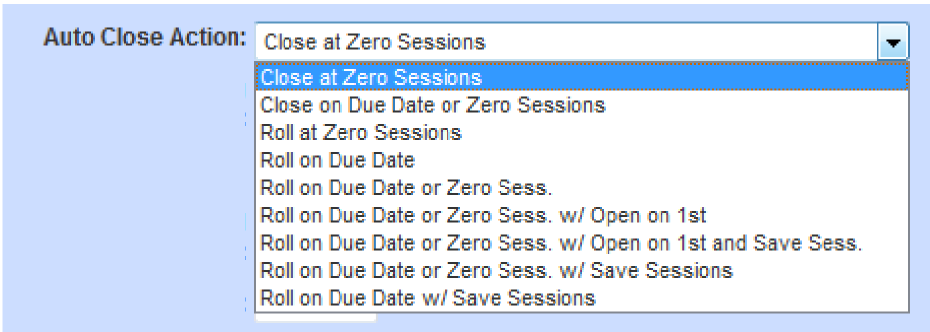
- Currency – Gives the ability to see client's monetary packages. Deductions occur based on the Charge Default Amount.
- Minutes – Gives the ability to sell client's time. Will deduct based on time marked done on the appointment in the scheduler.



Session Length

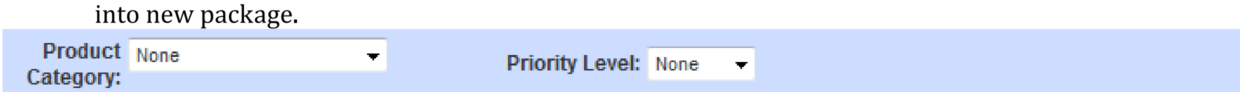
- Session length is set here. This will determine the amount of time one session is equal to as well as how much time is blocked in the scheduler when an appointment is made.
- The Smallest Scheduled Block function allows members or trainers to schedule increments of a session. I.e. A session equals 1 hour, but members are allowed to schedule ½ session for 30 minutes.

ShapeNet
www.getshape.net



Auto-close Actions

- **Close at Zero Sessions-** The package will close when the session count reaches zero. This happens in the background and there is no action taken by the Admin.
- **Close on Due Date or Zero Sessions –** The package will close when the session count reaches zero or when the due date hit, whichever comes first. The Admin will be prompted to close the package upon logging in.
- **Roll on Zero Sessions** – The package will roll when the session count reaches zero. This happens in the background and there is no action taken by the Admin.
- **Roll on Due Date** – The package will roll when the due date hits. The Admin will be prompted to take action on this package upon logging in.
- **Roll on Due Date or Zero Sessions -** The package will roll when the session count reaches zero or when the due date hit, whichever comes first.
- **Roll on Due Date or Zero Sessions w/ Open on the First-** The package will roll when the session count reaches zero or when the due date hit, whichever comes first. The open date for the package though will be the first of the month. If the close happens between the 1st and 15th and open will be the first of the current month. If the close happens between the 16th and the 31st the open will be the first of the next month.
- **Roll on Due Date or Zero Sessions w/ Open on the First and Saved Sessions-** The package will roll when the session count reaches zero or when the due date hit, whichever comes first. The open date for the package though will be the first of the month. If the close happens between the 1st and 15th and open will be the first of the current month. If the close happens between the 16th and the 31st the open will be the first of the next month. Any sessions not used will roll into new package.
- **Roll on Due Date or Zero Sessions with Saved Sessions -** The package will roll when the session count reaches zero or when the due date hit, whichever comes first. Any unused sessions will roll into new package.

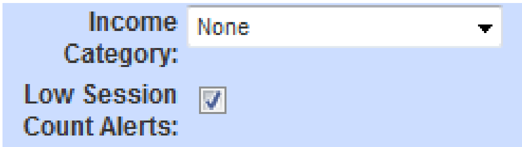


Product Category

- A way to categorize your service packages for ease of purchase. Examples of categories might be Personal Training, Tanning, Classes, Zumba etc.

Priority Level

- Sets the package in the listing of your products. Highest will be at the top and non at the bottom.

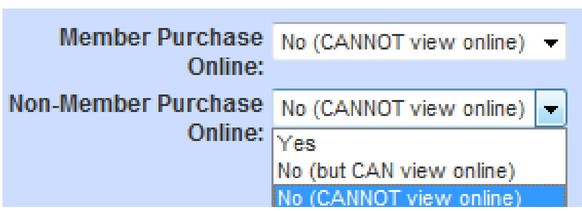


Income Category

- Tracks streams of revenue throughout the system. In Reports -> Financial -> Financial Summary you will be able to see how much each category is bringing into the facility on any time period chosen.

Low Session Count Alerts

- Checking the Low Session Count Alerts box will email members who own this package when their sessions are running low.
- Tools -> System Settings -> Other Settings -> Service Package Renewal Alert Session Count Trigger.
- The system default is 5.
- An email will go out with every done from 5 to 0.
- Also, Functions -> Marketing -> Email -> the low session alert email notification template needs to be activated.



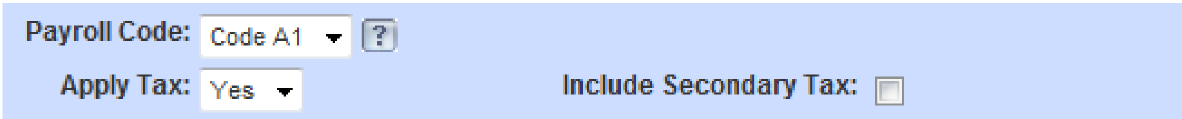
On-Line Purchasing

- A member is a client that had been entered in the system as a member or has been a member in the past.
- A non-member is a prospect or guest that has registered themselves or been entered by an admin into the system.
- Check Tools-> System Settings -> Member Settings, Non-member Settings and On-line Purchase Settings when creating how the member portal works and looks.
- Remember, no purchase through the system is possible without gateway integration thru Shape.

Author: Leslie Bechtel *Date Written: 1/17/2012*

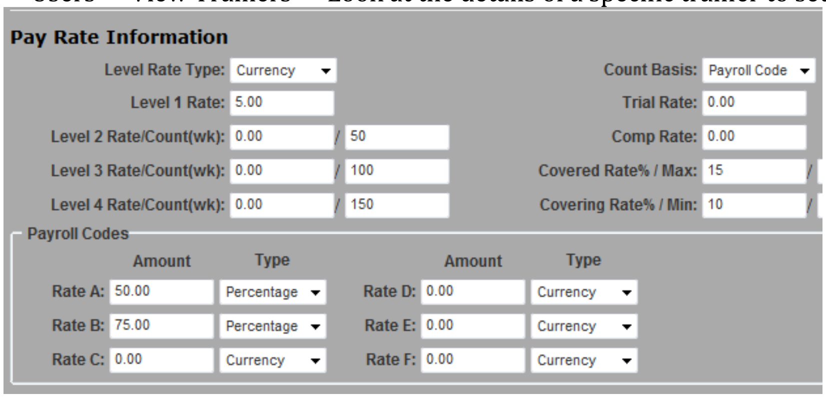
Updated by: *Date Updated*

Version:1 *Doc Location: Knowledge Base*



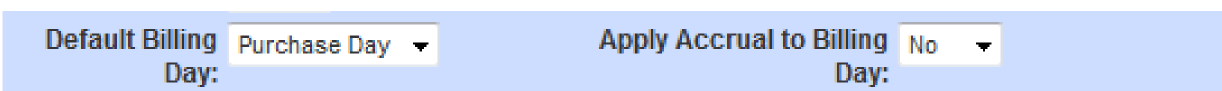
Payroll Code

- Tied to Trainer Payroll. Trainer's compensation can be driven by the service package being used.
- Functions -> Users -> View Trainers -> Look at the details of a specific trainer to set this.



Tax

- Is the service taxable yes or no?
- Tax rates are set in Tools-> System Settings -> Tax Rate.
- A secondary tax rate can be added for services like Tanning that require additional sales taxes.

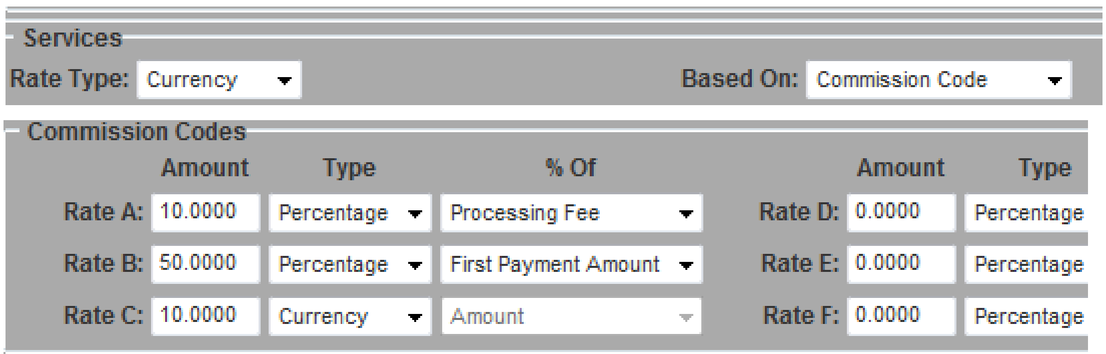


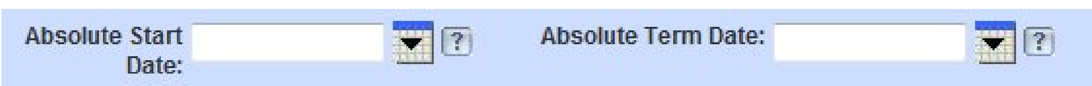
Setting the Billing date

- If the package is generating reoccurring billing you can either drive the billing date to a certain day of the month or leave it at the day of purchase.
- The date choices only go to 28 days because all months have 28 days.
- This can be over ridden at the point of purchase.
- Setting accrual to yes will charge the client the prorated amount from the day of purchase to the next set billing day.
- This will also prorate the number of session available during that same time period..
- IE. If the client has purchased 30 sessions monthly and it is now 5 days until the set billing period they will have 5 extra sessions added to the package to use in the accrual period.

Commission Codes

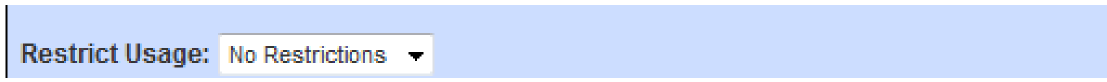
- Using the commission code feature allows pay out to differ for different service packages.
- Go to Functions -> Users -> View Salespeople and choose the details of any salesperson to set this up.
- Choosing the Do No Generate Commission box will never allow commission to be generated to any salesperson for this package

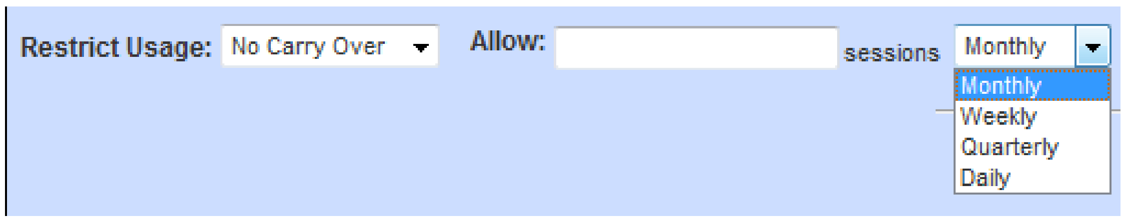


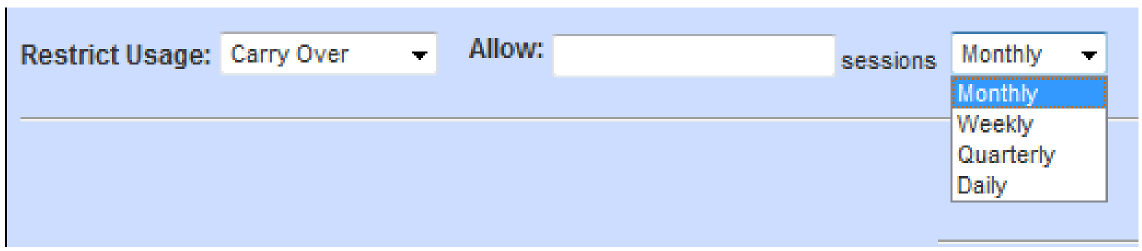


Absolute Start and End Dates

- Using the Absolute Start Date and Term Date feature create firm start and/or end dates no matter when the package is purchased.
- Examples are packages that run in semesters. Regardless of when it is purchased, it needs to end when the semester ends.

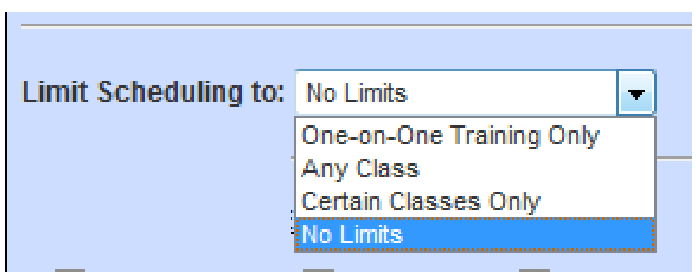






Usage Restrictions

- Leaving at **No Restrictions** allows the client to use the purchased sessions as often as they would like.
- **No Carry Over** – Sessions not used will not be carried over into the next period. Choose how many sessions they are allowed to use and what a period is equal to; daily, weekly, monthly or quarterly.
- **Carry Over** – Sessions not used will be carried over into the next period.



Scheduling Limits

- No Limits – Can be used for any event in the scheduler as well as one-on-one appointments.
- One-on-one Training Only – Can only be used for appointments with a single member. No group training.
- Any Classes – Can be used for any class event in the schedule but NOT one-on-one training.
- Certain Classes Only – Opens up a field with all of the class types in your system. Choose which ones can be used for scheduling with this package.

Author: Leslie Bechtel *Date Written: 1/17/2012*

Updated by: *Date Updated*

Version:1 *Doc Location: Knowledge Base*

Session Type: [?] Edit Session Types						
Boxing	Cardio	Child Care	Coaching	FCE	Group Exercise	Gymnastics
Health Review	Kickboxing	Locker	Massage	MUS	Nutrition	Physical Therapy
Pilates	Racquetball	Rental	Results	Ruth	Spinning	Stretching
Swimming	Tanning	Tennis	test	Tour	Towel	Training
Wallyball	Yoga	Zumba				

Session Types

- A type must be chosen, but more than one can be used.
- This will change the color of the event in the Schedule Matrix.
- You can pull on session type in some reporting features. I.E. Functions -> Service -> View Service -> Custom Query on Service Type.
- Choosing Edit Session Type will open the field below where custom types can be added and colors can be controlled.

+ Add New Session Type

	Description	Is Active?
Edit	Acupuncture	False
Edit	Boxing	True
Edit	Cardio	True
Edit	Child Care	True
Edit	Coaching	True
Edit	FCE	True
Edit	Group Exercise	True
Edit	Gymnastics	True
Edit	Health Review	True
Edit	Kickboxing	True
Edit	Laundry	False
Edit	Locker	True
Edit	Massage	True
Edit	MUS	True
Edit	Nutrition	True
Edit	Physical Therapy	True

Author: Leslie Bechtel *Date Written: 1/17/2012*

Updated by: *Date Updated*

Version:1 *Doc Location: Knowledge Base*