THE "HOLDING PEN"

The Holding Pen is the process by which members can added quickly in to ClubRunner by your Front Desk staff. ***It is the method by which 75% of ClubRunner customers add their members***. Typically, a member can be added in about 1 minute, including assigning a card and taking their picture (if applicable). You also have the ability to generate the member's contract from the holding pen (including their signature), and then store an image of that contract with the member's info (doing this will take longer that a minute, but it is still very fast). Additionally, you have accounted for the members payment as part of your daily sales. All this while members can still check in using the top portion of the screen.. Here's a quick tour, with minimal information...

The Holding Pen consists of 4 tabs or sections...Personal Info, Contact Info, Bank Info and Extended. Info. Depending upon how certain options are set, there can be as few as 6 fields that must be entered to create a new member. Those fields are in yellow, and they are: ***Member # (can be "0"), Type, First Name, Last Name, Membership Length and Initial Payment (can be $0).***

Personal Info | Contact Info | Bank Info | Extended Info

HOLDING PEN

Member #
1234

Type
EFT

Salutation

First Name
Sally

Last Name
Smith

Address Line 1

Address Line 2

City

State

Zip Code

X Cancel   ✓ OK

Personal Info | Contact Info | Bank Info | Extended Info

HOLDING PEN

Starting Date
10/25/2008

Next Billing Date

Cycles Remaining

Initial Payment
$39.99

Month to Month ->

Membership Length
Endless

Next Billing Cycle

Enrollment

1st Dues

Add'l Dues

<- Paid In Full

Renewal Date
11/25/2008

Next Billing Fee

Membership

Renewal

X Cancel   ✓ OK

P.O.S.

🔍 Member <Sally Smith>

Description	Qty	Amount	Extend
Initial Payment	1	39.99	39.99

Item #	Description	Amount
AS1001	Cleansing Gele-4oz	$28.00
AS1001.5	Cleansing Gele-6oz	$38.00
AS1002	Refining Scrub-4oz	$30.00
AS1002.5	Refining Scrub-6oz	$40.00

Charge To Account
Cash
Check
Credit Card
Loyalty Points
More...

Void

Discount	$0.00
Gratuity	$0.00
Tax	$0.00
TOTAL	$39.99
Discount	0.00 %
Gratuity	0.00 %

Close

Done! The printed receipt looks like...

ClubRunner
800-554-2582

October 24, 2008 12:11:06 am
            Sally Smith   Acct #2737
                    Member #1234
===

Item #9930
 1 Initial Payment $39.99
===
        Subtotal: $39.99

               _____
        TOTAL: $39.99

Paid by: Cash

              Paid: $39.99
            Change: $0.00

Receipt number : 96014

        Thank You
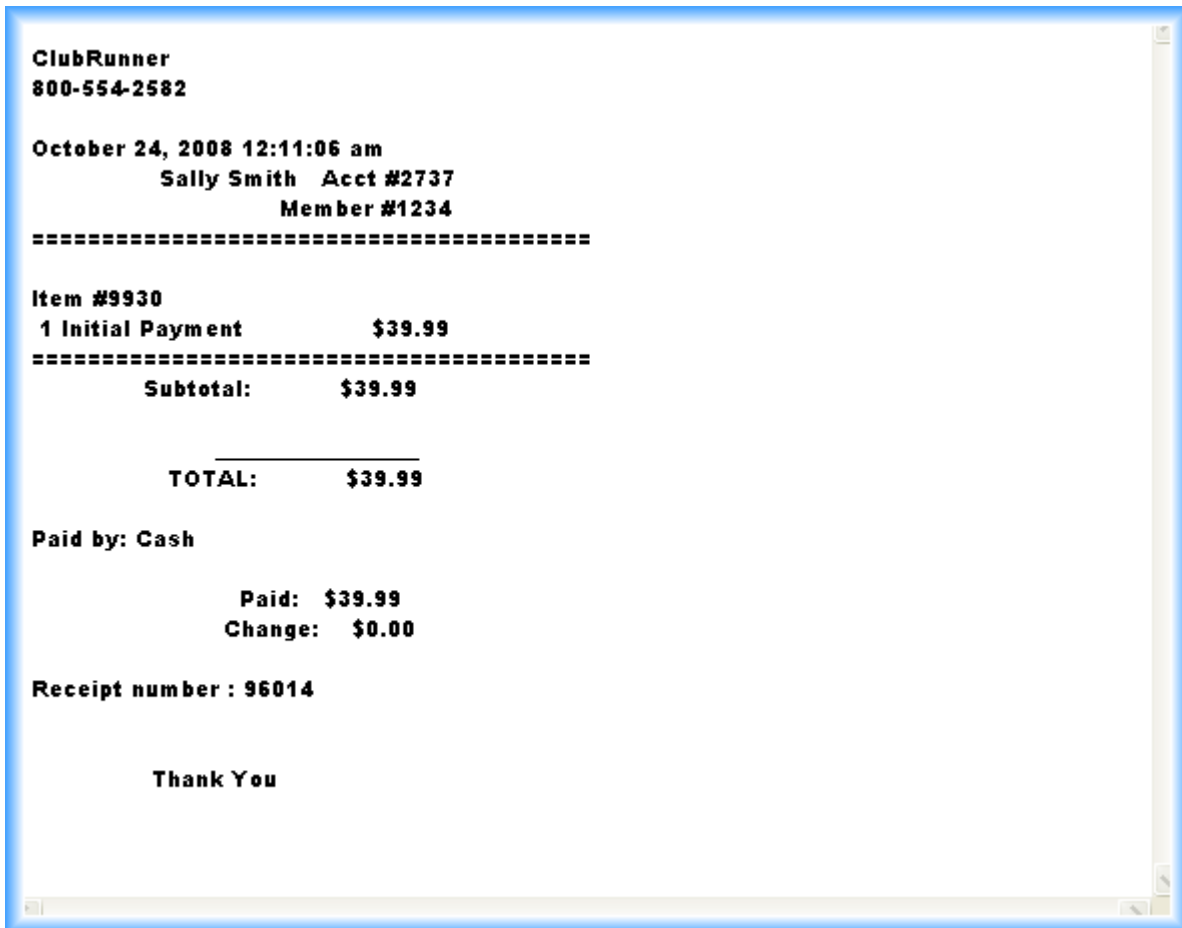
It's that simple and quick! The member has been added temporarily with their picture taken and a card assigned (if applicable). The membership will need to be validated in the Member's Module by staff with higher security levels. This is a "check & balance" to prevent internal theft.

Note that this membership was sold as "Endless" (as long as the member does not cancel, we'll continue to bill them). However, the Renewal Date has been set for 10 days after the Starting Date. Unless the Renewal Date is updated in the Members Module, the member will be denied access in 10 days. The number of days is a setting in Utilities...

From Start to Finish, taking it Step by Step...

In the Front Desk Module, click the Holding Pen button (F3)...
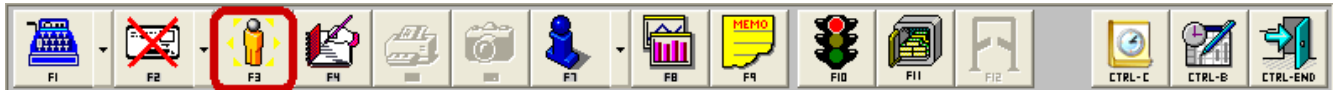
Personal Info tab

Data entry begins on the Personal Info Tab, and, we have already filled in the fields...

The data entry is very straight forward. Remember, only the "yellow" fields are required, but, the more that's entered here, the less that needs to be entered in the Member's Module later on. The Personal Info tab in the Holding Pen works identically to the Personal Info tab in the Member's Module. As you move, ClubRunner will skip the City & State fields, filling those in once you type the Zip Code.

Contact Info Tab

This tab is very straight forward, and none of the fields here are required if you're in a rush!

Bank Info Tab

There are two (2) CR.INI options that can be set to control this tab...They are located in the Holding Pen Add ons section.

```
[HOLDINGPEN ADDONS]
PAYMENTMETHODREQUIRED=TRUE
BANKINGDETAILS=FALSE
```

By default, nothing on this screen is required...

Setting "**PAYMENTMETHODREQUIRED=TRUE**" will force the operator to at least enter a Payment Method (Coupons, EFT Checking, EFT Credit Card, Not Available, Paid In Full or Statements). Setting "**BANKINGDETAILS=TRUE**" will require the operator to enter additional info, such as Credit Card # or Checking Account if necessary. Although this additional information for certain payment methods is critical to draft the member, often when a member is signing up they may not have this information with them. These options are a way around that restriction if desired.

Extended Info Tab

With the exception of the Membership Length and the Initial Payment, no other information on this tab is required. It is necessary fully fill this tab out if you are utilizing ClubRunner's Contract Printing feature, or, you just want your Front Desk staff to enter as much information as possible.

Next, ClubRunner wants to know how the member paid you. *Note: Even if there is no money being paid, you must still complete this screen ($0 by Cash, or Check, etc).* This is for security reasons...

You're almost done. The next step is only for those facilities that take pictures of their members...

Answering "Yes" will put up the picture taking window. After that, the last step is only for those facilities that assign cards to their members...
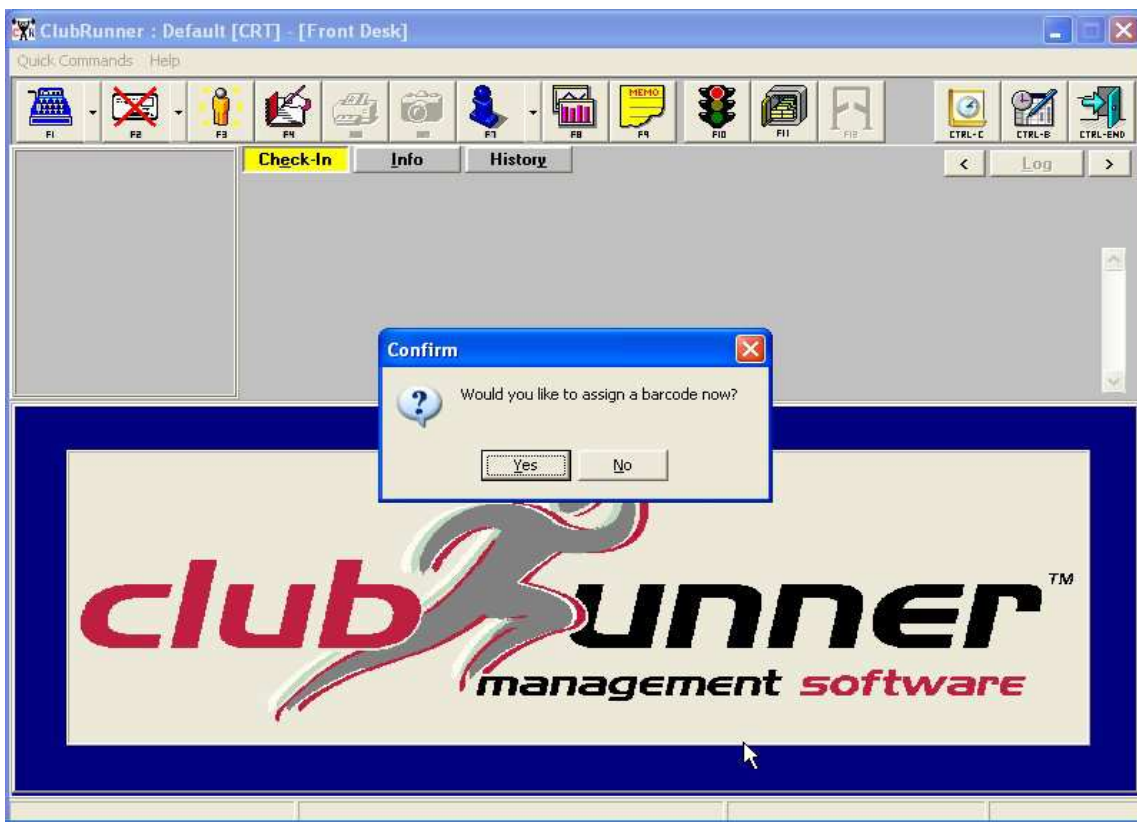
Answering "Yes" would get you to...

That's it, you're done! ***Note: Facilities that use the Contract Printing feature would go through a few additional steps.***

You have created a temporary membership that needs to be validated and completed (if there's missing info) in the Member's Module by an employee with a higher security level..

What Happens Next?

Depending upon how you have set up
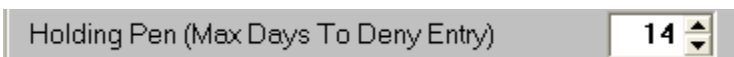
in the Utilities Module, you'll have that amount of days until the member will be denied access to your facility. The Max days to Deny Entry for Holding Pen members can be between 1 – 30 days. The "default" setting is 14 days. So, your data entry person(s) can actually go on a vacation for weeks and business will continue as usual!

Facilities vary their strategies as to when to take a member out of the Holding Pen and make them a permanent member. Some facilities do this as ASAP, later that day. Others do this once or twice a week. You'll decide what is best for your facility.

## Let's Make Holding Pen Members Permanent Members

Enter in to the Members Module...

Holding Pen members are already members, so, we need to find them by searching...
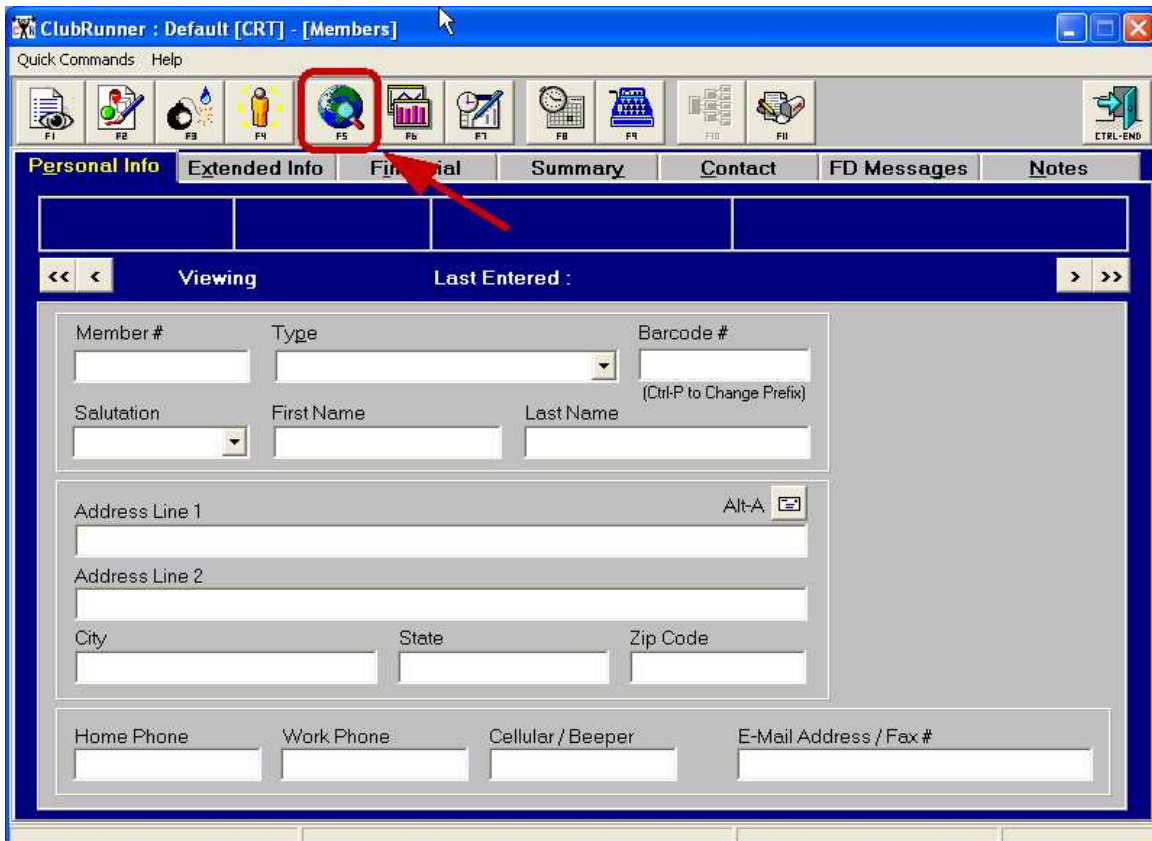
Here's a few "search" tips... Notice that we're searching on an "*". An "*" (asterisk) yields everyone in the returned search in the order of the selected search field. The default search field is "Member #", and the search field always occupies the third (3rd) column of the grid. An "*" would normally yield all my members in Member # order, but we've narrowed down who we are searching for by changing the lower left drop down to "Holding Pen Only". Our results show all members still in the Holding Pen. You could also have searched on these members by their name, phone #, etc., because they are under "Current Members" in the lower left drop down also.
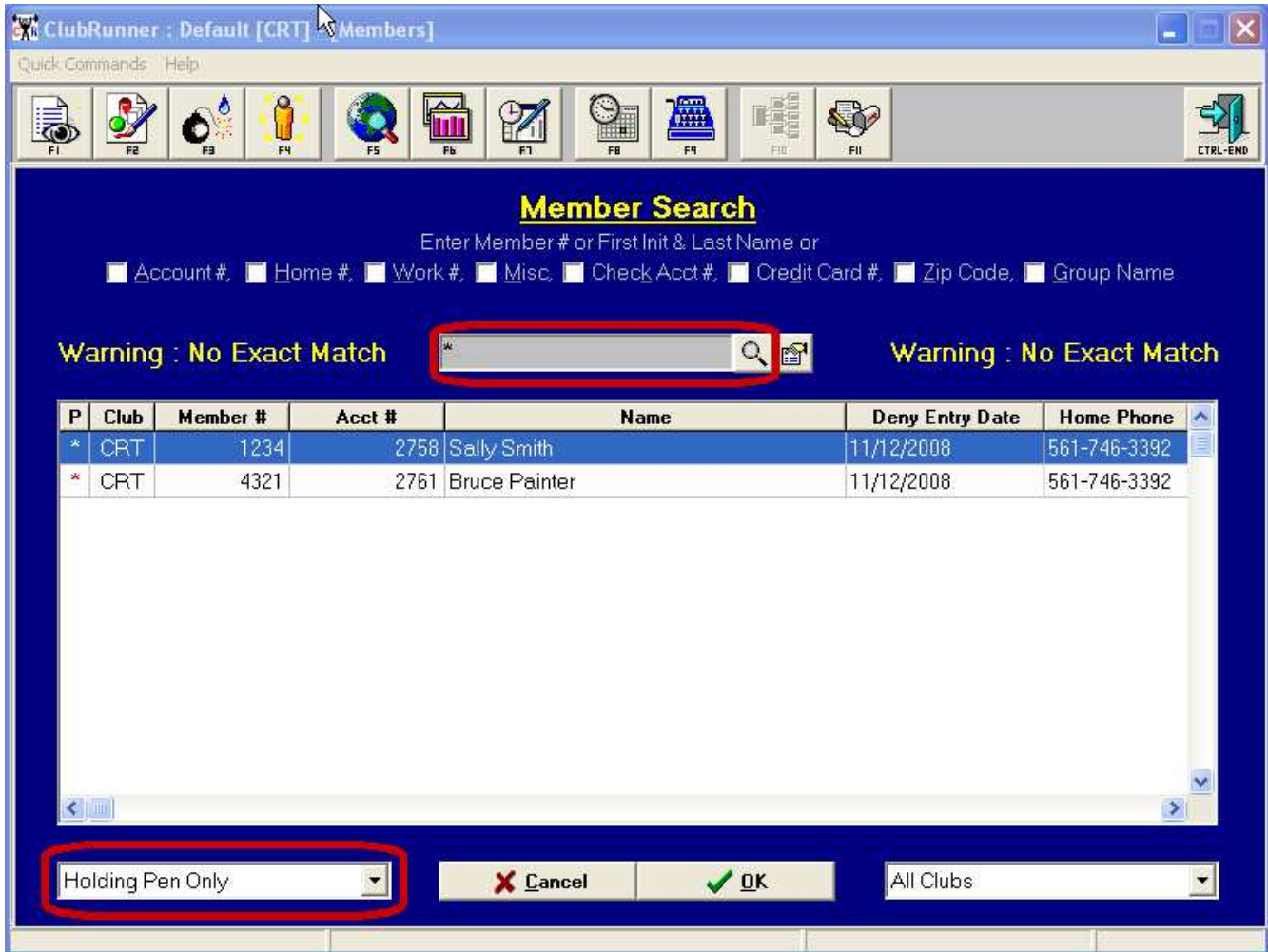
I'm going to pick Sally Smith from our search and make her a permanent member. I should get any paper work I have for her so I can review the contract in ClubRunner versus the hard copy to verify if there are any data entry mistakes or omissions...
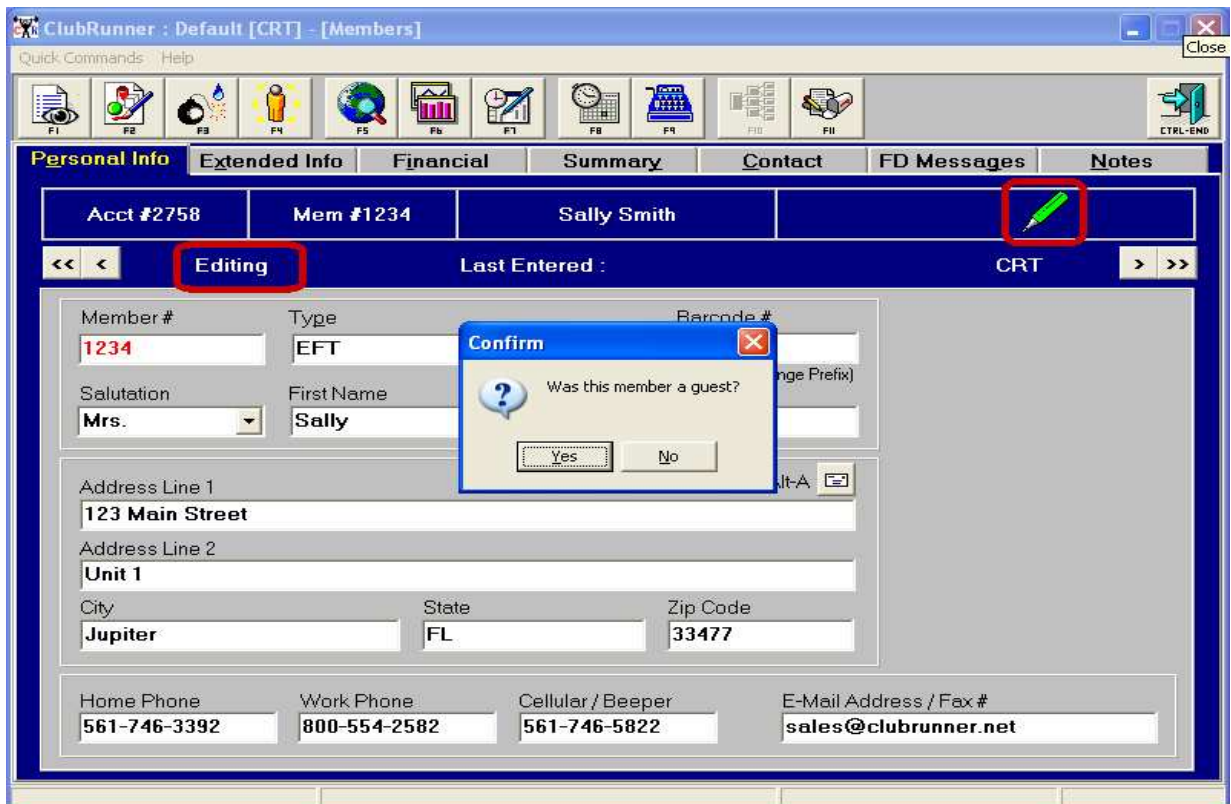
Notice the "**pen**" in the status bar area. This member is in the "Holding **Pen**". ClubRunner wants to know if this member was previously a Guest. Answering "Yes" will cause ClubRunner to search the Guest Module for a person with this name. If it finds a match, you'll select that person if the Guest is the same as the new Member. ClubRunner will then merge whatever Guest information that the new member is missing that it knows about from the guest record. Additionally, ClubRunner will mark the Guest as having become a member so that you will not continue to solicit the guest. For our purposes, Sally was never a guest...
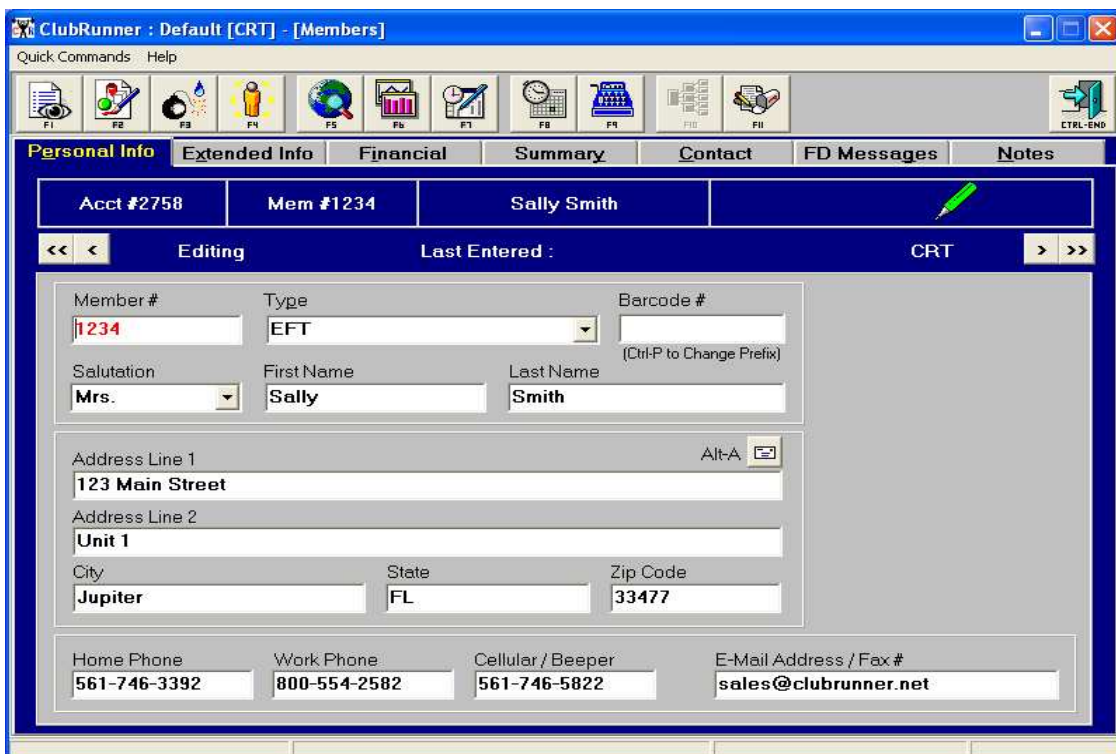
Begin the data verification process, and fill in any information that was omitted when the member was added to the Holding Pen. Continue on to the Extended Info tab...

Work your way down to the Renewal Date & Deny Entry On Date fields. Rather than re-type the member's proper dates, just press "delete" on the keyboard (erase the date) and then move to the next field. *ClubRunner will always recalculate these dates (based upon the length of membership) when they are erased and then you move off the field.*

Note: ClubRunner substitutes "11/18/2074" for its "Endless" date. That date is the last day that this version of ClubRunner will understand.

The "Contract Balance" should almost always be "$0.00" If it is not, make the appropriate corrections to either the Initial Payment or to any of the applicable Fees.

Continue verifying and making additions / changes / corrections as necesssary. When you move off this member and do anything else, ClubRunner will ask you if you want to transfer the member out of the Holding Pen. Reply "Yes" if you are satisfied that the member should be made permanent.