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# Front Desk User Manual

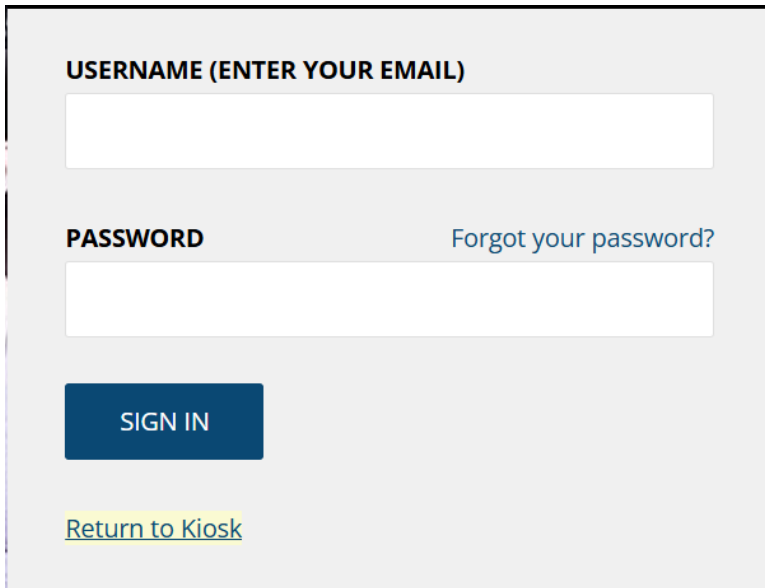
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## Logging Into Staff Account

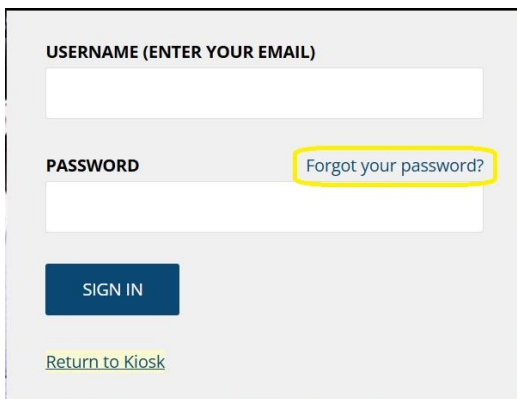
1. On the fitness center's Antaris login page, enter your **USERNAME (ENTER YOUR EMAIL)** and **PASSWORD** > **SIGN IN**



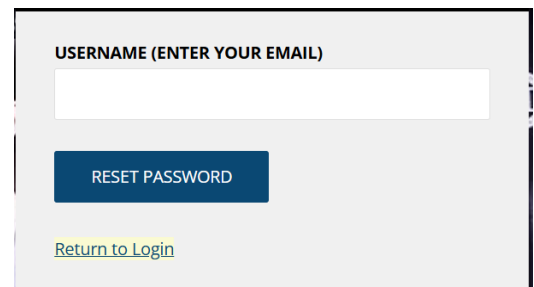
The screenshot shows a login form with two input fields: "USERNAME (ENTER YOUR EMAIL)" and "PASSWORD". A "Forgot your password?" link is located to the right of the password field. Below the fields is a blue "SIGN IN" button. At the bottom left, there is a link that says "Return to Kiosk".

## Resetting Login Password

1. On the fitness center's Antaris login page, click the [Forgot your password?](#) link > Enter **USERNAME (ENTER YOUR EMAIL)** > **RESET PASSWORD**
2. Check email folder for updated password (*Remember to check Spam or Junk email folders*)



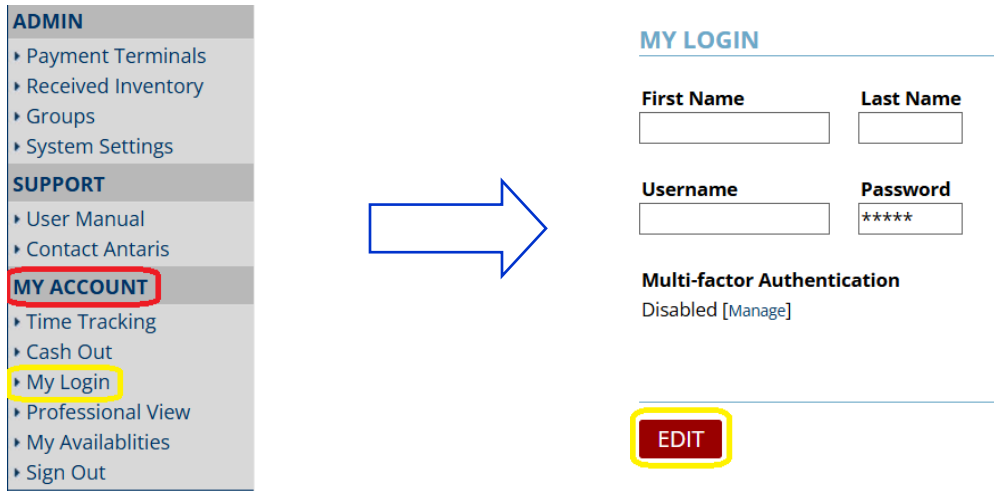
This screenshot is identical to the one above, but the "Forgot your password?" link is highlighted with a yellow rectangular box.



The screenshot shows a password reset form. It has a "USERNAME (ENTER YOUR EMAIL)" input field. Below it is a blue "RESET PASSWORD" button. At the bottom, there is a link that says "Return to Login".

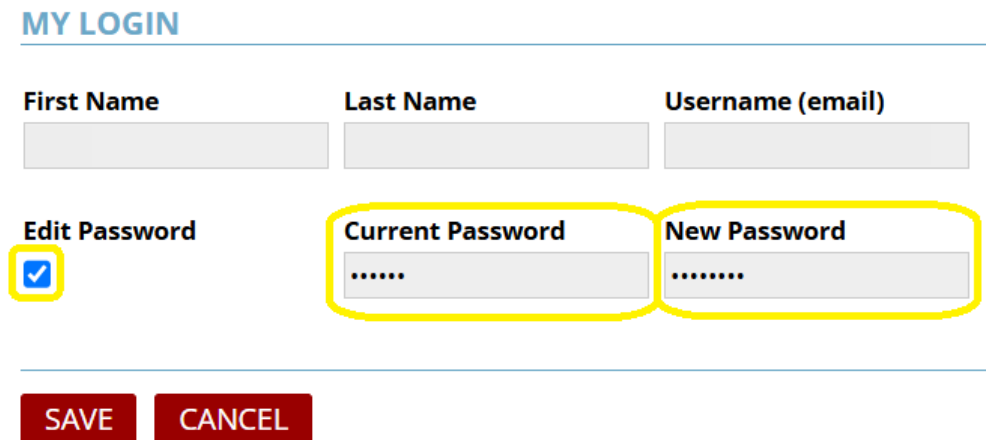
## Updating Login Password

1. Left Navigation Menu (*Left-side Menu*): **MY ACCOUNT** > My Login
2. On the My Login Page > **EDIT**



The screenshot shows the left navigation menu with 'MY ACCOUNT' highlighted in red and 'My Login' highlighted in yellow. A blue arrow points from the 'My Login' menu item to the 'MY LOGIN' page. The 'MY LOGIN' page has fields for 'First Name', 'Last Name', 'Username', and 'Password'. The 'Password' field contains six asterisks. Below these fields is a 'Multi-factor Authentication' section with the text 'Disabled [Manage]'. At the bottom of the page is a red 'EDIT' button with a yellow border.

3. Select **Edit Password** box > enter **Current Password** and **New Password** > **SAVE**



The screenshot shows the 'MY LOGIN' page with the 'Edit Password' section highlighted. The 'Edit Password' checkbox is checked. The 'Current Password' and 'New Password' fields are highlighted with yellow boxes. The 'Current Password' field contains six asterisks, and the 'New Password' field contains seven asterisks. At the bottom of the page are two red buttons: 'SAVE' and 'CANCEL'.

## Finding A Client Account - Option 1 (Quick Search)

Left-side menu: **ACCOUNTS** > set search type filter (6 options: First Name, Last Name, Agreement, Barcode, Email, Client ID, Team ID) > below drop-down filter, enter characters matching search type filter >

Select Client Account

- Blue Accounts indicates a current active club member
- Gray Accounts indicates an expired account
- Green Accounts indicates a lead client

The image shows two screenshots of the ACCOUNTS search interface. The left screenshot shows the search filter dropdown menu with 'First Name' selected. The right screenshot shows the search results for 'Adam' with a list of names and their status.

Search Filter	Search Results
First Name	Adam Carroll
	Adam Campbell
	ADAM CLEMENT
	ADAM COCHRANE
	<b>ADAM DUPUIS</b>
	Adam Fitzpatrick
	Adam Forrest
	ADAM HICKS

## Finding A Client Account - Option 2 (Advanced Search)

1. Left-side menu: **ACCOUNTS** > Advanced Search
2. On the Advanced Search page, select Search Filter Type set search type filter (4 options: Name, Phone, Postal/Zip, Barcode) > enter Search Value > **FIND** > Select client account

**ACCOUNTS**

First Name ▾

Enter first name...

Advanced Search

New Account

**MY QUICK LINKS**

Payment Terminal

Cash Receipts (Daily)

Check-In Visits (Daily)

All Links

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**ADVANCED SEARCH**

Select Club: All Clubs ▾

Select Search Type: Name ▾

Enter Search Value: Adam

**FIND**

Accounts = 22

Home Gym	ID #	Home Tel.	Mobile	Postal/Zip	Barcode	Extra Info
Kelowna	ADAMS, BRETT	2103	250.769.0806	250.212.7876	V1Z3L5	0003 [View]
Kelowna	Adamack, Nicholas	15461	250.769.3216	250.681.2834	v1z2y2	92599 [View]
Kelowna	Adamcova, Martina	11075	250.486.8864		V4T1J8	90837 [View]
Kelowna	Adams, Greg	13379	778.754.5007		V4T2K4	91439 [View]

\* If there are multiple accounts, hover over [\[View\]](#) for more information

Kelowna	Carroll , Adam	11043		250.870.3709	V4T1Y7	91429	[View]
Kelowna	DUPUIS, ADAM	4310	250.681.3557		V0H1X2	5492	[View]
Calgary	FIK, ADAM	4756	250.768.1474		V4T1J8	6698	[View]
Kelowna	Fitzpatrick, Adam	14907	250.809.9049	250.809.9049	V1Z4C2	92403	[View]
Kelowna	Forrest, Adam	16306		416.555.5555			[View]

**Joined** - Sep 10, 2010  
**Date of Birth** - Oct 31, 2010  
**Address** - 5290 Gireata Rd  
**Email** - addp@global.ca  
**MBSH Status** - Active  
**Work Tel. (Ext)** -

## Adding a New Client Account

\* To avoid duplicates, see steps for [Finding a Client Account](#) before adding new account

Left-side menu: **ACCOUNTS** > New Account

**ACTIVE CLUB**

Kelowna ▾

**ACCOUNTS**

First Name ▾

Enter first name...

Advanced Search

New Account

---

**NEW ACCOUNT - KELOWNA**

First Name: John

Last Name: Doe

**Duplicate Alert** [\[View Accounts\]](#)

Gender: Male

Date of Birth: -Month- ▾ -Day- ▾ -Year- ▾

Home Club	Client ID	Address	Mobile	Email	Barcode
Kelowna	16359	122 ohn street	-	noemail4622@antaris.ca	-

Primary Rep: \_\_\_\_\_ Occupation: \_\_\_\_\_

\* Antaris will also provide an alert for potential Duplicate Account after inputting the new client's First and Last name. To find out more, hover over [\[View Accounts\]](#)

# Adding a New Client Account (Continued)

### NEW ACCOUNT - KELOWNA

**First Name** John **Last Name** Doe **Duplicate Alert** [View Accounts] **Gender** Male **Date of Birth** -Month- -Day- -Year-

**Home Club** Kelowna **Account Type** Client **Team ID** **Current Group** **Add New Group**

**Primary Rep** Paul Hartwell **Occupation** **Employer** **Driver's License #**

**Payment Responsibility** Paying for Self

### HOME ADDRESS

**Street Number, Name & Type** **Unit/Suite/Apt**

**Country** United States **Province/State** Louisiana **City** Metairie **Postal/Zip Code** **Attention Line**

### CONTACT DETAILS

**Home Tel:** **Work Tel:** **Ext:** **Mobile:** **Email (Username)**  None **Contact Email**  None

**Work Email** **Emergency Contact** **Emrg. Tel:** **Emrg. Email** **Pref. Contact** Home Tel **Pref. Language** English

### SENIOR FITNESS PROGRAM

**Program** -Select- **Provider** -Select- **ID Number**

### GYM ACCESS DETAILS

**Check-In Status** Self-Managed

**Barcode** Auto-Generate **Temporary Access**  Expires 2025/01/25

**Eligible Locations**  Kelowna  Aquatics Park  Childcare  Calgary

### ADD FAMILY MEMBERS

### REFERRAL DETAILS

**Source** -Select- **Name/Details** **Email** **Primary Service** -Select-

**Select Next Step** Add Membership



1

2

3

4

5

6

7

SAVE CANCEL



## KEY FIELDS (Section 1)

- First Name, Last Name, Gender, and Date of Birth
- **Home Club:** Verify that you selected the correct home club; if not, toggle Active Club on left menu
- **Account Type:** Set Employee if new client uses Payroll Deduct for recurring charges
- **Team ID:** Enter payroll/team ID if new client uses Payroll Deduct for recurring charges
- **Current Group:** Set group (i.e. corporate account) if new client belongs to a company, school or group
- **Payment Responsibility:** If new client has recurring charges paid for by another client, set to **Assign a Payer** and enter first name of current client account. *\*Select Relationship field is Optional*

The screenshot shows a form with several fields. The 'Payment Responsibility' dropdown is set to 'Assign a Payer'. Below it, a search box contains 'Jane'. The 'Set Relationship' dropdown is open, showing options: '-Select-', 'Child', 'Employee', 'Secondary', and 'Wife/Husband/Partner'. The 'HOME ADDRESS' section is expanded, showing a list of addresses: 'Jane Greenhough', 'Jane McKenzie-Hill', 'Jane Reuvers', 'Janelle Menzies', and 'Janelle O'Rourke'. The 'Country' is set to 'United States' and 'Province' is set to 'Louisia'. The 'Pos' field is partially visible.

## KEY FIELDS (Section 2)

- Home Address Information

## KEY FIELDS (Section 3)

- **Phone Numbers:** Enter 10 digits without any spaces or special characters
- **Email (Username) and Contact Email:** Check None box if new client doesn't have any email
  - a. **Email (Username)** must be unique; it cannot be duplicated across different client accounts
  - b. **Contact Email:** can be duplicated across different client accounts
  - c. Do not enter a fake email, always select None box if no email is provided

## KEY FIELDS (Section 4)

- **Senior Fitness Program:** If new client belongs to an Insurance Program, select **Program** and **Provider** (set Not Listed if provider not on the list), enter **ID Number** (verify accuracy)

## KEY FIELDS (Section 5)

- **Check-In Status:** If new client has his/her club/gym membership access covered by another member (e.g. through a Couples or Family membership) set to **Assign a Member** and enter first name of current client account (i.e. the member providing access to the new client account being created)
- **Barcode:** Use the Auto-Generated code or Enter a new scan card/key fob code

## KEY FIELDS (Section 6)

- **Add Family Members:** Click the green **ADD FAMILY MEMBERS** button if new client has family members (i.e. sub/secondary accounts getting added at same time)

Add Family Members [Eligible Accounts]

**Payment Responsibility** **Check-In Status**

Assign to New Client ▼ Assign to New Client ▼

**First Name** **Last Name** **Relationship** **Gender** **Date of Birth** **Email** **Barcode**

-Select- ▼ Male ▼ -Mth ▼ -Day ▼ -Year ▼   Auto-Generate ▼

**ADD**

- If new client is not paying for the recurring charges for the family members then set **Payment Responsibility to Paying for Self**
- If new client is not sharing the membership agreement with the family members (i.e. each family member gets their own membership), then set **Check-In Status to Self-Managed**
- Select **ADD** for each additional new family member being added, you must enter their **First Name and Last Name**; the other fields are optional

## KEY FIELDS (Section 7)

- **Referral Detail:** Input referral details as needed
- **Select Next Step:** Select desired destination page and click **SAVE** (i.e. Add Membership if you want to add the new client's membership after adding their new account)

# Adding a Membership Agreement

After selecting a client's account, top menu: **CONTRACTS** > **Memberships** > [Add] (in table title)

John Doe

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installation Plans **Memberships** Programs Charges

**MEMBERSHIP AGREEMENTS**

Exclude Criteria  
 Expired (Not Check-In)  **UPDATE**

Agreements [Add]

**ADD MEMBERSHIP AGREEMENT**

For: Gym Membership | Type: Single 12m | Set Check-In:  | Agreement #: 16359 | Renewal:  | Buyer: John Doe

The selected membership will also automatically add the following agreement types: 1 Month KickStarter

Additional Buyer Information

Commission Type: By Contract | Commission: Paul Hartwell | %: 0.00 | Classes:  | Assign Equipment Rental:  | Location: -Location- | Type: -Type- | Number: -Select-

**KEY DATES**

Sold	Start Date	Status	Initial Expiry	Current Expiry
2025/01/18	2025/01/18	Active	2026/01/01	2026/01/01

**PAYMENT DETAILS**

Apply Discount %

Initial Charge

Date	Enrollment	First Due	Last Due	Paid-In-Full	FOB	Enhancement	Pre-Tax	Taxes	Total
2025/01/18	45.00	22.58	0.00	0.00	0.00	0.00	67.58	0.00	67.58

Pre-Set Recurring Charges

Frequency	Initial Billing Date	Billings	Last Pre-Set	Payment Method	Pre-Tax	Taxes	Total
Monthly	2025/02/01	11	2025/12/01	-Select-	50.00	0.00	50.00

PAPs Pending: 11 | Amount: 550.00

Auto-Renew Recurring Charges

Frequency	Initial Billing Date	Next Billing Date	Payment Method	Pre-Tax	Taxes	Total
Monthly	2026/01/01	2026/01/01	-Select-	55.00	0.00	55.00

## KEY FIELDS (Section 1)

- **For and Type:** Set their values to the membership agreement that is being sold
  - After the Type selection is made, the system will automatically populate all the key dates and payment amounts tied to the selected membership
- **Set Check-in:** If this membership type will be responsible for determining the member's check-in status into the club/gym then leave this box checked. If the membership type not responsible for determining the member's check-in status then uncheck the box.
- **Renewal:** If adding a new membership for a previous member, click Renewal box
- **Additional Buyer Information:** Enter information if there is extra information related to the sold membership
- **Commission:** If tracking sales rep, set accordingly (default value is User entering membership)

## KEY FIELDS (Section 2)

- **Sold Date:** Verify correct Sold Date of membership. Update if a sold membership is from an earlier date.
- **Start Date:** Verify correct Start Date of membership. Update if membership is to start on a future date.
- **Initial Expiry:** Verify correct Expiry Date of membership. Update to set the members' last day of access at the club/gym

## KEY FIELDS (Section 3)

- **Apply Discount %:** This will apply a % to the full membership; Initial Charge and Recurring Charges.
- **Initial Charge:** Details the amount owing at time of sale (i.e. what the member owes as of today), if there is amount owing at time of sale then the Initial Charge box will be checked.

Total	On Account	Assign Method	Payment Method	Trans. #	Receipt
55.00	<input type="checkbox"/>	-Select- ▼	Card Present ▼		Create ▼

- **Add Initial Payment:** Verify total of the correct amount owing at time of sale; set **Payment Method** to the payment type being used. If client will be paying at a later date check **On Account** box **and** set **Assign Method**; if client is making payment today.
- **Pre-Set Recurring Charges:** **Its box is only checked when the sold membership has a contract period** for its recurring membership charges; if so:
  - **Initial Billing Date** indicates the date when the 1<sup>st</sup> recurring charge will occur; **Billings** indicates the number of contractual charges, and **Last Pre-Set** indicates the date when final contractual charge; set

**Payment Method** to the payment method being used for the recurring charge; verify **Total** displays the correct recurring amount to be charged

- **Auto-Renew Recurring Charges:** Its box is only checked when the sold membership has an open-ended recurring membership charge (i.e. recurring amount charged until membership is cancelled); if so, **Initial Billing Date** indicates the initial date when this auto-renew recurring charge will occur; set **Payment Method** to the payment method being used for the recurring charge; verify **Total** displays the correct recurring amount to be charged

The screenshot shows a web form for a membership agreement. At the top, there is a dropdown menu labeled "Origin of Purchase" with the text "Client present at club for purchase." and a downward arrow. A red box highlights this dropdown, and a red line points to a larger, expanded view of the dropdown menu on the right. The expanded menu shows four options: "Client present at club for purchase." (highlighted in blue), "Client not at club for purchase - send email to add signature.", and "Client not at club for purchase." Below the dropdown is a section titled "Terms and Conditions" with a sub-section "Electronic Signature" containing a checked checkbox and the text "I understand that my electronic signature below constitutes a legal signature confirming acceptance of the membership agreement." Below this is a "Please sign below" label and a large empty rectangular box for a signature. At the bottom left of the form is a "CLEAR" button. At the bottom right are three buttons: "SAVE AND EMAIL", "SAVE", and "CANCEL".

- Once Membership Agreement has been correctly completed, select **Origin of Purchase**
  1. Client Present at club for purchase
  2. Client not at club for purchase – send email to add signature
  3. Client not at club for purchase
- **Electronic Signature** check box to add signature in the signature box. Use signature pad to insert signature.

\* Click **SAVE and EMAIL** (if you want to email client membership PDF) or **SAVE** after all information is entered and verified

# Adding Billing Information - US Clients

After selecting a client account, top menu: **FINANCIAL**>**Billing Sources** > [Add]

The screenshot shows the top navigation bar with the 'FINANCIAL' menu item highlighted. Below it, the 'Billing Sources' sub-menu is selected. Underneath, there are three options for adding billing sources, each with an '[Add]' button and a numbered callout:

- 1** ACH [Add]: Hit [Add] to add the client's ACH account.
- 2** Online ACH Account [Add]: Hit [Add] to add the client's online ACH account.
- 3** Online Credit Card [Add]: Hit [Add] to add the client's credit card details.

## ADD PAGE FOR DIFFERENT BILLING SOURCES

### 1. Adding ACH (for US clubs that self-manage their ACH billing)

\* club's billing key is needed to enter Encryption Key

The screenshot shows the 'ADD ACH ACCOUNT' page. It includes a section titled 'How To Enter An ACH Account' with instructions: 'The routing (9 digits) and account numbers (4-17 digits) appear at the bottom of the check. Please be careful when entering the information to ensure accuracy.' Below this is an image of a check from Arrowhead Credit Union. Callouts point to the routing number and checking account number on the check. The form below the check has the following fields:

- Type: Checking (dropdown)
- Routing Number: [input field]
- Account Number: [input field]
- Account Holder: Larry Morrison
- Encryption Key: [input field]
- Confirm Key: [input field]

## 2. Adding Online ACH (for US clubs that automate their ACH billing)

### ADD ONLINE ACH ACCOUNT

#### How To Enter An ACH Account

The routing (9 digits) and account numbers (4-17 digits) appear at the bottom of the check. **Please be careful** when entering the information to ensure accuracy.



Type  
Checking ▾

Routing Number

Account Number

## 3. Adding Online Credit Card (for all US clubs)

\*some clients may see a CSV field – this can be left blank

### ADD ONLINE CREDIT CARD

Card Type  
Visa ▾

Card Number

Cardholder Name  
Larry Morrison

Expiry Date  
-- ▾ -- ▾

## Adding Billing Information - Canadian Clients

After selecting a client account, top menu: **FINANCIAL** > **Billing Sources** > [Add]

**Larry Morrison** PROFILE ACCOUNT MANAGEMENT CONTRACTS VISITS **FINANCIAL**  
Receipts Purchases **Billing Sources** Owed Charges Activity Statements

**STORED BILLING SOURCES**

- 1** Credit Card **[Add]**  
Hit [Add] to add the client's credit card details.
- 2** Debit Account **[Add]**  
Hit [Add] to add the client's debit account details.
- 3** Online Credit Card **[Add]**  
Hit [Add] to add the client's credit card details.
- 4** Online Debit Account **[Add]**  
Hit [Add] to add the client's online debit account.

## ADD PAGE FOR DIFFERENT BILLING SOURCES

1. **Adding Credit Cards** (for CDN clubs that self-manage their credit card billing)

\*ONLY available to legacy CDN clients; the club's billing key is needed to enter Encryption Key

### ADD STORED CREDIT CARD

**Card Type**  
Visa

**Card Number**

**Cardholder Name**  
Larry Morrison

**Expiry Date**  
-- --

**Encryption Key**

**Confirm Key**



## 2. Adding Debit (for CDN clubs that self-manage their EFT Debit billing)

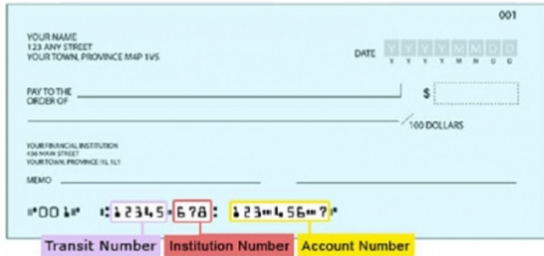
\*club's billing key is needed to enter Encryption Key

### ADD DEBIT ACCOUNT



#### How To Enter A Debit Account

The transit (5 digits), institution (3 digits) and account (7-12 digits) numbers appear at the bottom of the cheque. Should the account number have less than 7 digits, pad it by adding 0 at the beginning. **Please be careful** when entering the information to ensure accuracy.



Transit Number

Institution Number

Account Number

Account Holder

Encryption Key

Confirm Key

## 3. Adding Online Credit Card (for CDN clubs that automate credit card payments)

### ADD ONLINE CREDIT CARD

Card Type

Card Number

Cardholder Name

Expiry Date

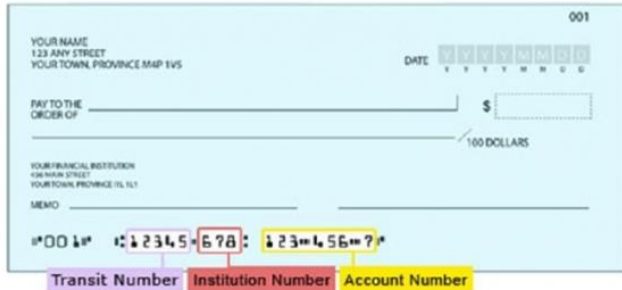
#### 4. Adding Online Debit (for CDN clubs that automate EFT Debit payments)

##### ADD ONLINE DEBIT ACCOUNT



##### How To Enter A Debit Account

The transit (5 digits), institution (3 digits) and account (7-12 digits) numbers appear at the bottom of the cheque. Should the account number have less than 7 digits, pad it by adding 0 at the beginning. **Please be careful** when entering the information to ensure accuracy.



Transit Number

Institution Number

Account Number

Account Holder

## Adding/Updating A Member Picture

1. After selecting a client account, top menu: **PROFILE** > **Overview** > **Add PIC** or **EDIT PIC**

The screenshot shows the client profile page for Adam Forrest. The top menu includes 'PROFILE' and 'Overview'. The 'ADD PICTURE' section is highlighted, showing a placeholder for the member picture and a 'CAPTURE & UPLOAD' button. The 'ADD PICTURE' button is also highlighted in the original image.

Adam Forrest

PROFILE

Overview

OVERVIEW

PROCESS POS

First Name: Adam

Client ID: 16306

SFP: Ineligible

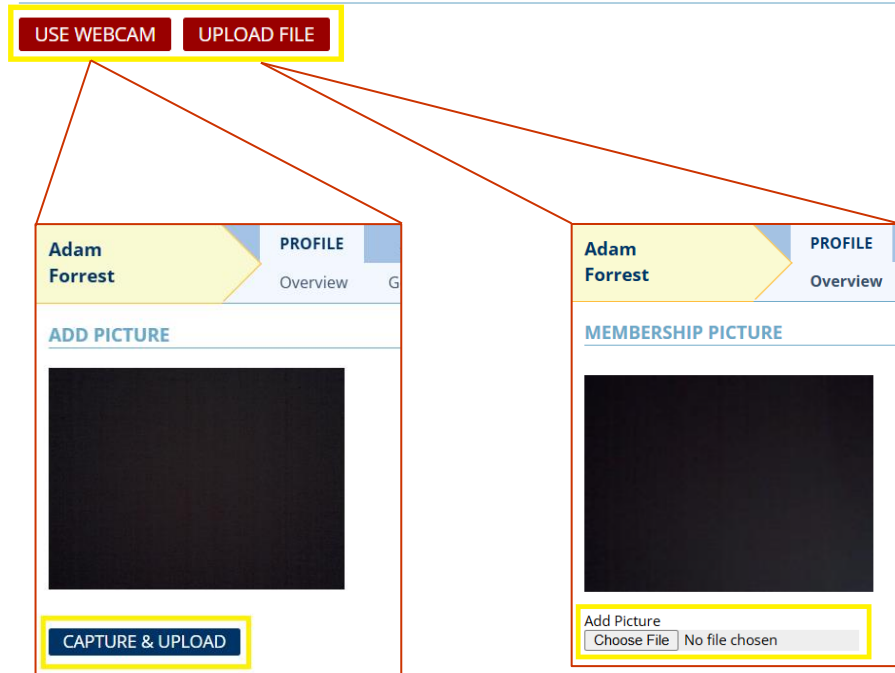
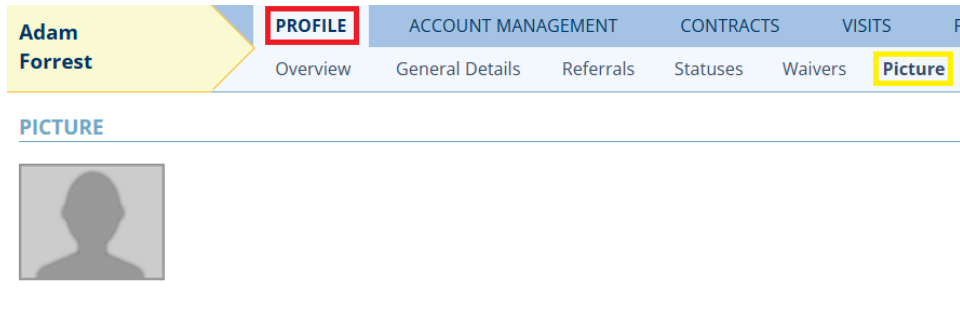
ADD PICTURE

CAPTURE & UPLOAD

**OR**

2. After selecting a client account, top menu: **PROFILE** > **Picture** > **USE WEBCAM** or **UPLOAD FILE**

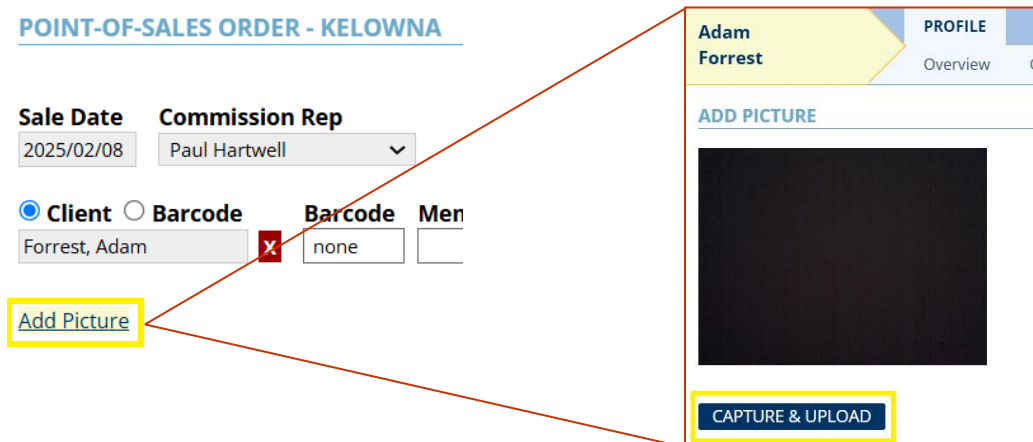
\* This option allows you to use a webcam or upload a file for member's picture



**OR**

3. In **POINT-OF-SALES** > **Add Picture**

\*This option will only have Add Picture if there is no Profile Picture, otherwise it will show View Picture



# Adding A Waiver

After selecting a client account, top menu: **PROFILE** > **Waivers** > [Add]

Ben Greenaway

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

Overview General Details Referrals Statuses **Waivers** Picture

## WAIVERS

Waiver: [Add]

There are no waivers. Hit the Add icon to add a waiver.

Ben Greenaway

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

Overview General Details Referrals Statuses **Waivers** Picture

## WAIVER - KELOWNA

<b>Created</b>	<b>By</b>	<b>For</b>	<b>Client ID</b>
Feb 8, 2025	Paul Hartwell	Ben Greenaway	14711

**SELECT WAIVER**

- CHILD CARE
- CHILD CARE**
- Client Portal NO Age 14-19
- SPA WAIVER FORM
- WAIVER AND RELEASE OF LIABILITY

I hereby agree to play that may result in damages and injuries in the participation of my child during these activities of my child.

I agree to participate in gym and playground/area activities and that my child is healthy and has no unknown/hidden physical or mental disabilities or infirmities that would restrict his/her full participation in such activities.

### Electronic Signature

I, **Paul Hartwell**, hereby, for myself and on behalf of my child, agree to save and hold harmless and fully indemnify Happy House Daycare Management and Staff, on the account that all normal safety procedures have been taken on behalf of Management and Staff, from any and all liability for any personal injury or injury to any third-party child resulting from my child's actions/participation in the above-mentioned activities.

Please sign below

**CLEAR**

**SAVE** **CANCEL**

**SELECT WAIVER** to sign > Check **Electronic Signature** box > Sign > **SAVE**

## Adding Memo Notes

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Memo Notes** > [Add]

The screenshot shows the user interface for adding memo notes. The top navigation bar includes the user name 'Ben Greenaway', a 'PROFILE' tab, and the 'ACCOUNT MANAGEMENT' menu. Under 'ACCOUNT MANAGEMENT', the 'Memo Notes' option is highlighted. Below this is a 'MEMO NOTES' section with a 'Notes [Add]' button. A red box highlights the 'MEMO NOTE' form fields: 'Use Template' (1), 'Subject' (2), 'Note' (3), and 'Check-In Note' (4). The 'Check-In Note' field includes 'Not Displayed' and 'Expiry Date' (2025/02/08). At the bottom are 'SAVE' and 'CANCEL' buttons.

### KEY FIELDS

1. **Use Template:** Optional - Select a Memo Note template with preset field values
2. **Subject:** Enter subject for memo note
3. **Note:** Enter note for memo note
4. **Check-In Note**
  - a. **Not Displayed** – memo note will not appear on the check-in page
  - b. **Unflagged** – memo note will appear in the Other Notes section on check-in page
  - c. **Flagged** – memo note will appear in the Flagged Notes section (creates ALERT flag); use **Expiry Date** if you want to flagged note to flip to unflagged on a specific date

**SAVE**

## Adding/Updating POS - On Account Eligibility (i.e., House Charges)

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] (in **POS - On Account** row)

**Brad Fisher**

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS

Overview General Details Referrals **Statuses** Waive

### STATUSES

Statuses

Type	Status	Action	Date	By
Authorized Guardians	None	[Edit]		
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Group Payer	Ineligible	[Edit]		
Mobile App	Invite Active	[View Code] User needs contact email.		
Payment Responsibility	Paying for Self	[Edit]		
<b>POS - On Account</b>	<b>Ineligible</b>	[Edit]		
Senior Fitness Program	Ineligible	[Edit]		
SMS Marketing	Subscribed	[Edit]		
Statement Status	None	[Edit]		
Suspended	No	[Edit]		

### POS - ON ACCOUNT

**Status**  
Eligible  **1**

**Method**  
-Select-  **2**

**SAVE** **CANCEL**

## KEY FIELDS

1. **Status:** Set to Eligible if client should be allowed house charges for POS purchases; set to Ineligible if client is no longer allowed house charges for POS purchases
2. **Method:** When Status is Eligible, then set Method to payment method assigned for any house charges for POS purchases.

**SAVE**

## Adding Point of Sale (POS) Purchase

Left-side menu: **POINT-OF-SALES** > POS

**ACTIVE CLUB**  
Kelowna

**POINT-OF-SALES ORDER - KELOWNA**

**ACCOUNTS**  
First Name  
Enter first name...

**MY QUICK LINKS**  
› billing sources  
› All Links

**POINT-OF-SALES**  
› POS

**VISITS**  
› Check-Ins  
› Scheduler  
› Group Classes  
› Programs

**CONTRACTS**  
› Memberships  
› Installment Plans  
› Renewable Packages  
› Programs

**APPROVAL QUEUE**  
› Memberships  
› Installment Plans  
› Change Requests

**CRM HUB**  
› Passes  
› Gifts, Credits & Promos  
› Rentals  
› CRM Events  
› Billing Sources

**BATCH PROCESSES**  
› Marketing Campaigns  
› Contracts  
› Automated Billing  
› Self-Managed Billing  
› Payroll Deduct  
› Statements  
› Programs

**REPORTS**  
› Financial  
› Visits  
› Inventory  
› Clients  
› Staff

**Sale Date** 2025/02/22 **Commission Rep** Paul Hartwell

**Client** Hunter, Steven **Barcode** none **Membership** Family **Status** Expired **Number** 9986 **Owed** \$0.00 **Appts.** No

**Product** Enter product name... **OR** **Select Category** **Class Packages**

Classes 5-Pack **Paid Aqua Class** PILATES ONLY Clss Punch Cards Specialty 3 Pack

**Purchases**

Qty	Item/Package	Sale %	Price (\$)	Taxes	Amount
1	Paid Aqua Class	0	5.00	\$0.50	\$5.50
<b>Total:</b>					<b>\$5.50</b>

**APPLY GIFTS, CREDITS & PROMOS**

**Add Payment**  
 **On Account** **Select Method**

CARD PRESENT CNP CASH CHECK OTHER

**Amount** 5.50 **Change Due** 0.00 **Net Payment** 5.50 **Trans. #** **Add Note** **Receipt** Create

**PROCESS AND EMAIL** **PROCESS** **CANCEL** **OPEN DRAWER**

## KEY FIELDS

- Sale Date:** If recording sale from before today, set accordingly  
**Commission Rep:** If tracking sales rep for POS sale, set accordingly
- Client** or **Barcode:** Set client making purchase by using **Client** (by last name) or **Barcode** filter
  - Take note of client's membership status, current balance (Bal.) and outstanding gift cards (GCs)
- Enter UPC Barcode** or **Select Category:** Pull up sale item either by either scanning product's barcode or Select Category drop-down
- Select Item:** When using Select Category drop-down, select the Category the item is listed under >click on the item being purchased, every click on an item will increase its quantity (Qty) to be sold
- POS-Purchases:** If applicable, set Qty (quantity), Sale %, and Price accordingly
  - Click **red** X button if the item should no longer be sold
- APPLY GIFTS, CREDITS, & PROMOS:** Click **GREEN** button if client wants to redeem a gift card/certificate/credit towards their POS purchase
  - A gift card/certificate/credit can be found by using either the **Number** or **Buyer** filter; multiple ones can be used for the same POS purchase
  - Set **Apply** amount accordingly

Apply Gift, Credit & Promo

Number  Buyer

X

#	Sold	Number	Buyer	Available	Apply	Balance
1	Feb 20, 2024	11.50	CALLU GAIRDNER	\$11.50	5.5	\$6.00 X
				<b>Total:</b>	<b>\$5.50</b>	

- On Account:** If client is allowed house charges, click On Account box
- Select Method**
  - CARD PRESENT:** Initiates the integrated POS Terminal for a card present payment (i.e. client taps/swipes/inserts their credit card)
  - CNP:** Initiates the integrated POS Terminal for a card not present payment (i.e. staff manually keys in the client's credit card)  
***Both CARD PRESENT and CNP are only available for US clients using an integrated POS Terminal; otherwise staff member records payment method (eg. Visa, MC) used for POS purchase made in stand-alone POS Terminal that isn't connected to Antaris POS page***
  - ONLINE CC:** Uses the client's stored credit card for real-time credit card payment
- Receipt:** Select correct "Create & Print" option for your printer

PROCESS AND EMAIL OR PROCESS



# Adding Point of Sale (POS) Purchase (w/Split Payment Option)

Left-side menu: **POINT-OF-SALES**>POS

**ACTIVE CLUB**  
Kelowna

**ACCOUNTS**  
First Name  
Enter first name...  
Advanced Search  
New Account

**MY QUICK LINKS**  
Billing sources  
All Links

**POINT-OF-SALES**  
POS

**VISITS**  
Check-Ins  
Scheduler  
Group Classes  
Programs

**CONTRACTS**  
Memberships  
Installment Plans  
Renewable Packages  
Programs

**APPROVAL QUEUE**  
Memberships  
Installment Plans  
Change Requests

**CRM HUB**  
Passes  
Gifts, Credits & Promos  
Rentals  
CRM Events  
Billing Sources

**BATCH PROCESSES**  
Marketing Campaigns  
Contracts  
Automated Billing  
Self-Managed Billing  
Payroll Deduct  
Statements  
Programs

**REPORTS**  
Financial  
Visits  
Inventory  
Clients  
Staff

**ADMIN**  
Payment Terminals  
Received Inventory  
Groups  
System Settings

**SUPPORT**  
User Manual  
Contact Antaris

**MY ACCOUNT**  
Time Tracking  
Cash Out  
My Login  
Professional View  
My Availabilities  
Sign Out

**POINT-OF-SALES ORDER - KELOWNA**

**Sale Date** 2025/02/22 **Commission Rep** Paul Hartwell **1**

**Client** General, General **Barcode** none **Membership** **Status** No Agreem... **Number** **Owed (Pay)** \$1,383.61 **Appts.** No **2**

**Note:** The selected client has the following eligible gifts, credits and promos [View]  
[View Picture]

**Product** OR **Barcode**  
Enter product name... **3**

**Select Category**  
**Class Packages** **4**

Classes 5-Pack **Paid Aqua Class** PILATES ONLY Class Punch Cards Specialty 3 Pack

**Purchases**

Qty	Item/Package	Sale %	Price (\$)	Taxes	Amount
1	Paid Aqua Class	0	5.00	\$0.50	\$5.50
<b>Total:</b>					<b>\$5.50</b>

**APPLY GIFTS, CREDITS & PROMOS** **6**

**Add Payment**

**The amount owing is \$5.50.**

Method	Apply AMT (\$)	Add Note
<b>Credit Card</b> <input type="radio"/> Card Present <input type="radio"/> Card Not Present		
Cash <input checked="" type="checkbox"/>	5.50	
<b>Total Cash</b> 10		<b>Change Due</b> 4.50
Check <input type="checkbox"/>		
Other <input type="checkbox"/>		
Payroll Deduct <input type="checkbox"/>		
<b>On Account</b> <input type="checkbox"/>		
<b>APPLIED</b>		<b>\$5.50</b>
<b>UNAPPLIED</b>		<b>\$0.00</b>

**Select Receipt**  
Create **8**

**PROCESS AND EMAIL** **PROCESS** **CANCEL** **OPEN DRAWER**

## KEY FIELDS

- Sale Date:** If recording sale from before today, set accordingly  
**Commission Rep:** If tracking sales rep for POS sale, set accordingly
- Client** or **Barcode:** Set client making purchase by using **Client** (by last name) or **Barcode** filter
  - Take note of client's membership status, current balance (Bal.) and outstanding gift cards (GCs)
- Enter UPC Barcode** or **Select Category:** Pull up sale item either by either scanning product's barcode or Select Category drop-down
- Select Item:** When using Select Category drop-down, select the Category the item is listed under >click on the item being purchased, every click on an item will increase its quantity (Qty) to be sold
- POS-Purchases:** If applicable, set Qty (quantity), Sale %, and Price accordingly
  - Click **red** X button if the item should no longer be sold
- APPLY GIFTS, CREDITS, & PROMOS:** Click **GREEN** button if client wants to redeem a gift card/certificate/credit towards their POS purchase
  - A gift card/certificate/credit can be found by using either the **Number** or **Buyer** filter; multiple ones can be used for the same POS purchase
  - Set **Apply** amount accordingly

Apply Gift, Credit & Promo

Number  Buyer

X

#	Sold	Number	Buyer	Available	Apply	Balance	
1	Feb 20, 2024	11.50	CALLU GAIRDNER	\$11.50	5.5	\$6.00	X
				<b>Total:</b>	<b>\$5.50</b>		

## 7. Select Method

### a. Credit Card

- Card Present:** Initiates the integrated POS Terminal for a card present payment (i.e. client taps/swipes/inserts their credit card)
- Card Not Present:** Initiates the integrated POS Terminal for acard not present payment (i.e. staff manually keys in the client's credit card)
- ONLINE CC:** Uses the client's stored credit card for real-time credit card payment

***Both Card Present and Card Not Present are only available for US clients using an integrated POS Terminal; otherwise staff member records payment method (eg. Visa, MC) used for POS purchase made in stand-alone POS Terminal that isn't connected to Antaris POS page***

b. **On Account:** If client is allowed house charges, click On Account box

**Split Payments:** When processing a split payment, select the 1st payment method and adjust the amount. Then select the 2nd payment method and the remaining amount will be populated.

Add Payment

The amount owing is \$5.50.

Method	Apply AMT (\$)	Add Note
<b>Credit Card</b> <input checked="" type="radio"/> Card Present <input type="radio"/> Card Not Present <input type="radio"/> Online CC	<input checked="" type="checkbox"/> 5	
Cash	<input checked="" type="checkbox"/> 0.50	
<b>Total Cash</b> 1		<b>Change Due</b> 0.50
Check	<input type="checkbox"/>	
Other	<input type="checkbox"/>	
Payroll Deduct	<input type="checkbox"/>	
<b>On Account</b>	<input type="checkbox"/>	

**APPLIED \$5.50**

**UNAPPLIED \$0.00**

**PROCESS AND EMAIL OR PROCESS**

# Issuing Refunds/Reversals

1. For Memberships: After selecting a client account, top menu: **CONTRACTS** > **Charges** > [Rev]

The screenshot shows the 'CONTRACTS' menu for Gabriel Tobias. The 'Charges' sub-menu is highlighted. Below it, the 'CONTRACT CHARGES' section is visible, including a filter criteria box and a table of charges.

**Charges -> Set Criteria**

Due Date: From 2023/10/22 to 2025/10/22  
 Type: All  
 For: All

**PMT Status**

Approved  Charged  Declined  Deleted  Pending  Unapproved  Waived **UPDATE**

**[SUMMARY BY DATE]**

Charges from Oct 22, 2023 to Oct 22, 2025

Date	Client	Payer	Type	For	OBL	Amount	PMT Status	Method	Action	Proc. Date	Retries
Nov 1, 2024	Gabriel Tobias	Self	Memb. Rec.	No	\$30.00	Pending	Online CC			Nov 1, 2024 [Edit] [Disable]	0
Sep 15, 2024	Gabriel Tobias	Self	Memb. Rec.	Yes	\$30.00	Approved	Online CC		[Rev.] [Dec.]	-	0

The screenshot shows the 'FINANCIAL' menu for Gabriel Tobias. The 'RETURNING/REVERSE CHARGING AN ITEM/PACKAGE' form is displayed, including fields for 'For', 'PAP Date', 'Amount', 'Apply REV', 'Balance', and 'Reverse Date'. The 'Apply REV' field is highlighted with a yellow box.

**RETURNING/REVERSE CHARGING AN ITEM/PACKAGE**

For: (1) Gym Membership PAP  
 PAP Date: Sep 15, 2024  
 Amount: \$30.00  
 Apply REV: 30.00  
 Balance: \$0.00  
 Reverse Date: 2024/09/15

**Set Offsetting Transaction** Method: Add Note

Add Refund -Select-

**WHEN TO SELECT REFUND**

You are initiating a refund through the POS terminal, or with Cash, Check, Other or Payroll Deduct.

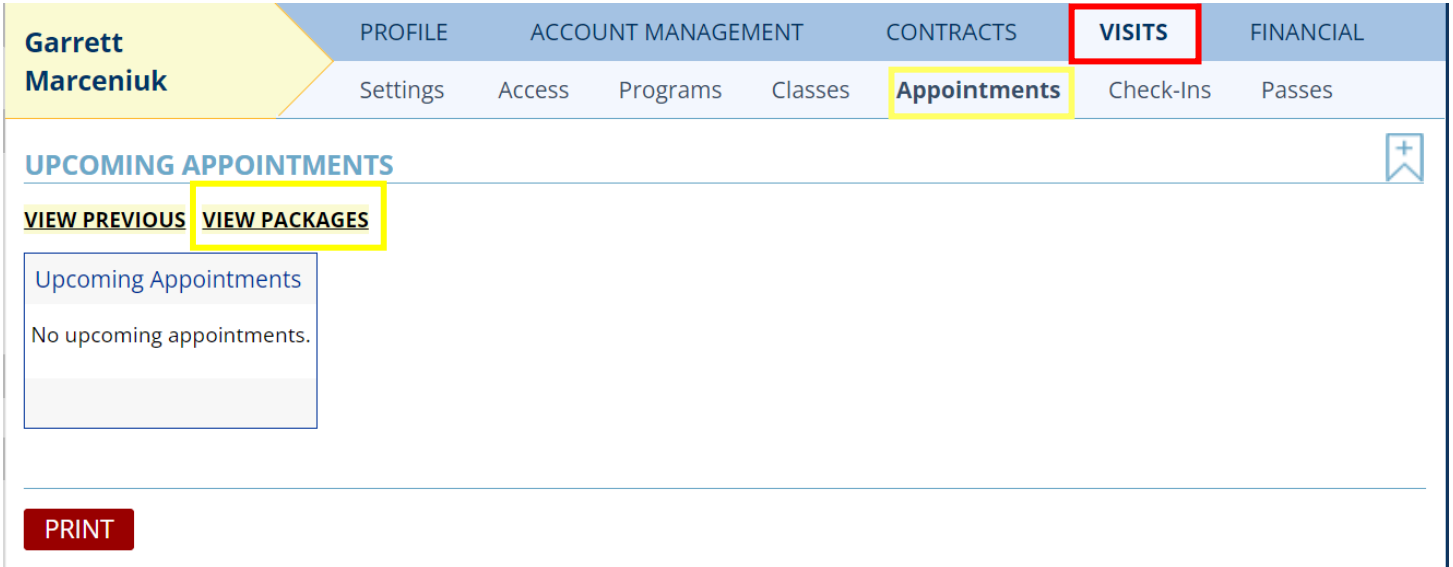
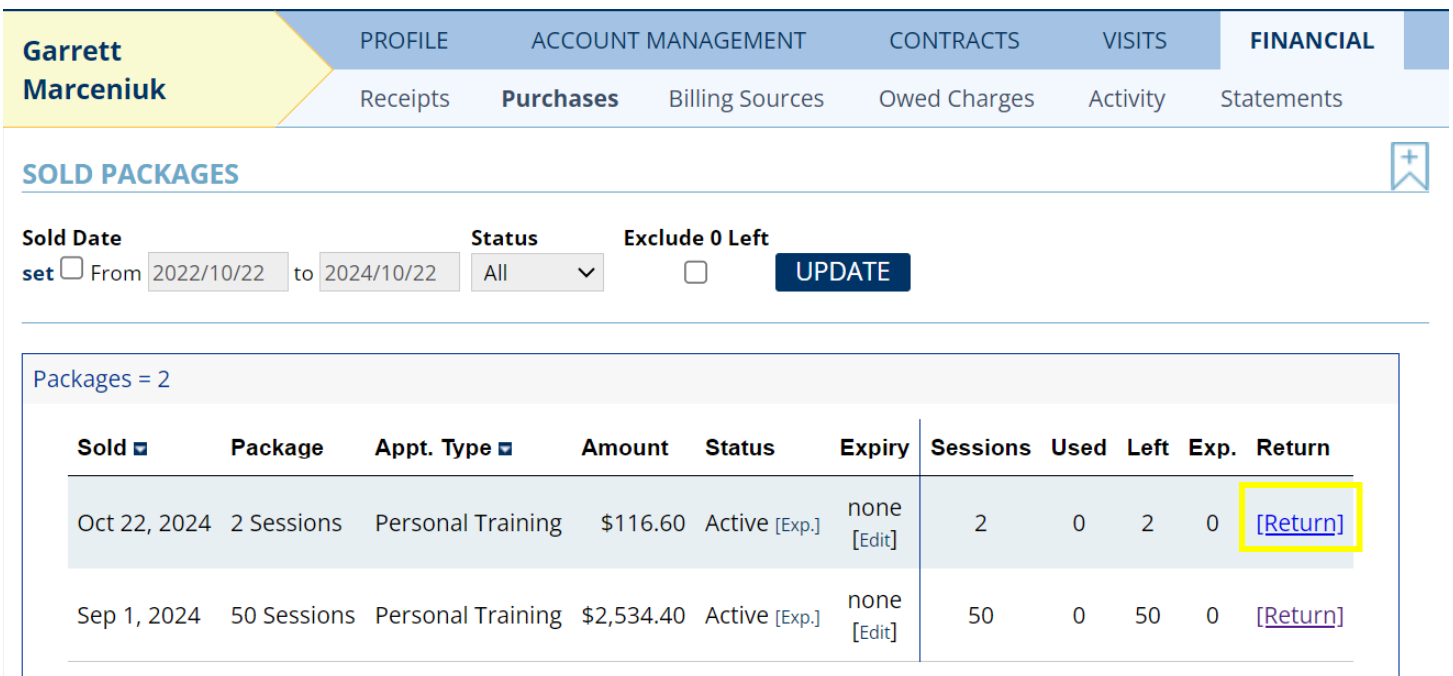
**SAVE CANCEL**

## Set Offsetting Transaction Options

- **Add Refund** – you want to initiate a refund through the POS terminal (Card Present/Card Not Present) or with Cash, Check, Other or Payroll Deduct

- **Add Prepaid Credit** – you want to add a credit that can be manually applied to upcoming charges or POS sales *NOTE: credits are NOT AUTOMATICALLY APPLIED*
- **None (Will Apply Manually)** – you want to enter the offsetting transaction manually
- **Add Money to Online CC** – you want to refund directly to the credit card on file  
*NOTE: this option only appears for Clubs using FISERV CARDPOINTE SYSTEM and the Client has an Online CC on file*

2. For Packages: After selecting a client account, top menu: **VISITS > Appointments > VIEW PACKAGES**

Sold Date set  From 2022/10/22 to 2024/10/22 Status All  Exclude 0 Left  UPDATE

Sold	Package	Appt. Type	Amount	Status	Expiry	Sessions	Used	Left	Exp.	Return
Oct 22, 2024	2 Sessions	Personal Training	\$116.60	Active [Exp.]	none [Edit]	2	0	2	0	[Return]
Sep 1, 2024	50 Sessions	Personal Training	\$2,534.40	Active [Exp.]	none [Edit]	50	0	50	0	[Return]

### RETURNING/REVERSE CHARGING AN ITEM/PACKAGE



Source	For	Sold	Amount	Return Date
POS	(1) 2 Sessions	Oct 22, 2024	\$116.60	2024/10/22

<b>Set Offsetting Transaction</b>	<b>Method</b>	<b>Add Note</b>
Add Refund	-Select-	

#### WHEN TO SELECT REFUND

You are initiating a refund through the POS terminal, or with Cash, Check, Other or Payroll Deduct.

SAVE

CANCEL

#### Set Offsetting Transaction Options

- **Add Refund** – you want to initiate a refund through the POS terminal (Card Present/Card Not Present) or with Cash, Check, Other or Payroll Deduct
- **Add Prepaid Credit** – you want to add a credit that can be manually applied to upcoming charges or POS sales *NOTE: credits are NOT AUTOMATICALLY APPLIED*
- **None (Will Apply Manually)** – you want to enter the offsetting transaction manually
- **Add Money to Online CC** – you want to refund directly to the credit card on file  
*NOTE: this option only appears for Clubs using FISERV CARDPOINTE SYSTEM and the Client has an Online CC on file*

3. For POS sales: After selecting a client account, top menu: **FINANCIAL** > **Purchases** > Retail Products > [Return]

The screenshot shows the 'FINANCIAL' menu for Garrett Marceniuk. The 'Purchases' option is highlighted in yellow. Below the menu, there are filters for 'Sold Date' (From 2024/09/22 to 2024/10/22), 'Category' (All), and 'Product' (All), with an 'UPDATE' button. A table titled 'Purchases' lists two items:

Date	Category	Product	Quantity	Amount	Return
Oct 8, 2024	Coffee Bar	Espresso single shot	1	\$2.55	[Return]
Oct 8, 2024	Your Gym Bag Regular	Whey Gourmet Bar	1	\$3.30	[Return]

The screenshot shows the 'RETURNING/REVERSE CHARGING AN ITEM/PACKAGE' form. The 'FINANCIAL' menu is visible at the top. The form includes the following fields:

- For:** (1) Whey Gourmet Bar
- Sold:** Oct 8, 2024
- Amount:** \$3.30
- Return Date:** 2024/10/08
- Set Offsetting Transaction:** Add Refund
- Method:** -Select-
- Add Note:** (empty text box)

Below the form, there is a section titled 'WHEN TO SELECT REFUND' with the text: 'You are initiating a refund through the POS terminal, or with Cash, Check, Other or Payroll Deduct.'

At the bottom, there are 'SAVE' and 'CANCEL' buttons.

### Set Offsetting Transaction Options

- **Add Refund** – you want to initiate a refund through the POS terminal (Card Present/Card Not Present) or with Cash, Check, Other or Payroll Deduct
- **Add Prepaid Credit** – you want to add a credit that can be manually applied to upcoming charges or POS sales *NOTE: credits are NOT AUTOMATICALLY APPLIED*
- **None (Will Apply Manually)** – you want to enter the offsetting transaction manually
- **Add Money to Online CC** – you want to refund directly to the credit card on file  
*NOTE: this option only appears for Clubs using FISERV CARDPOINTE SYSTEM and the Client has an Online CC on file*

## Adding/Updating A Barcode

\* If you know the client's scan card/fob when creating their account, see [Adding A New Client Account](#) "Barcode" section

After selecting a client account, top menu: **VISITS**>**Access**>[Edit]

John Doe

PROFILE ACCOUNT MANAGEMENT CONTRACTS **VISITS** FINANCIAL

Settings Access Classes Appointments Check-Ins Guest Passes

**ACCESS**

Check-In Status [Edit]  
Self-Managed

**Barcode** [Edit]  
none assigned

Temporary Access [Edit]  
 Expires

Visits Counter [Edit]  
 Start Date  Initial  Visits  Left  Expiry Date none  
 AutoRenew MonthDay  Initial Reset  Last Updated

Eligible Locations [Edit]  
 Seattle  Bodyz  aPod

**NOTE:** Click **SAVE** after adding/updating the barcode

## Adding Client Document

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Documents** > [Add]

JOHN FRASER

PROFILE **ACCOUNT MANAGEMENT** CONTRACTS VISITS FINANCIAL

CRM Events Memo Notes Change Requests **Documents** Logs Ratings

**DOCUMENTS**

Documents [Add]

Added	Type	Action	Delete
Sep 6, 2022 (9:47am)	Other	<a href="#">View</a>	[Delete]

**NOTE:** from the **Add Document** window, set corresponding **Type**, **Choose File** for finding file to upload from computer (uploaded file cannot exceed 2MB and must be .jpg, pdf or .png format)



## Adding Family Members

\* If there is an existing client's family member's account, when creating their new account, see [Adding A New Client Account](#)" ADD FAMILY MEMBERS" section

After selecting a client account, top menu: **PROFILE** > **Statuses** > **ADD FAMILY MEMBERS**

The screenshot shows the client profile page for Tara Brennan. The top navigation bar includes PROFILE, ACCOUNT MANAGEMENT, CONTRACTS, VISITS, and FINANCIAL. The PROFILE tab is active, and the 'Statuses' sub-tab is selected. Below the navigation, there is a table of statuses with columns for Type, Status, Action, Date, and By. At the bottom of the page, there is a green button labeled 'ADD FAMILY MEMBERS'.

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Group Payer	Ineligible	[Edit]		
Payment Responsibility	Paying for 2 other accounts	[View] [Delete All]		
POS - On Account	Eligible	[Edit]		
Senior Fitness Program	Ineligible	[Edit]		
SMS Marketing	Subscribed	[Edit]		
Statement Status	None	[Edit]		
Suspended	No	[Edit]		

The screenshot shows the 'Add Family Members' form. The form has a title 'Add Family Members [Eligible Accounts]'. It contains several dropdown menus: 'Payment Responsibility' (Assign to Client), 'Check-In Status' (Assign to Client), 'Team ID' (Do not set), and 'Group' (Do not set). Below these are input fields for 'First Name', 'Last Name', 'Relationship' (-Select-), 'Gender' (Male), 'Date of Birth' (-Mth, -Day, -Year), and 'Barcode'. There is an 'ADD' button, a 'SAVE' button, and a 'CANCEL' button.

**NOTE:** If current client is not paying for the recurring charges for its family members then set **Payment Responsibility to Paying for Self**; if current client's membership does not cover the club/gym access for its family members then set **Check-In Status to Self-Managed**; if you want to copy current client's Team ID (i.e. payroll ID) to family members then set accordingly; if you want to copy current client's Group (i.e. corporate account) ) to family members then set accordingly; for each new family member being added, you must enter their First Name and Last Name; all other fields are optional

## Adding Payment Responsibility

\* If you know a client's payment responsibility when creating their new account, see [Adding A New Client Account](#)" Payment Responsibility" section as an alternative option for setting their payment responsibility or see [Add Family Members](#) steps for adding their new account

After selecting a client account, top menu: **PROFILE>Statuses>**[Edit] (in **Payment Responsibility** row)

Jane McKenzie-Hill

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

Overview General Details Referrals **Statuses** Check-In Waivers Picture

### STATUSES

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Payment Responsibility	Paying for Self	[Edit]		
POS - On Account	Ineligible	[Edit]		
Senior Fitness Program	Ineligible	[Edit]		
SMS Marketing	Subscribed	[Edit]		
Statement Status	None	[Edit]		
Suspended	No	[Edit]		

ADD FAMILY MEMBERS

### ASSIGN PAYMENT RESPONSIBILITY

Assign a Payer

ADD

CANCEL

**NOTE:** In **Assign a Payment** field, enter first name of current client account that will be paying for their recurring charges

## Adding Check-In Status

\* If you know a client's check-in responsibility when creating their new account, see [Adding A New Client Account](#) "Check-In Status" section as an alternative option for setting their check-in status or see [Add Family Members](#) steps for adding their new account

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit](in **Check-In-Status** row)

**Jane McKenzie-Hill** PROFILE ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL  
Overview General Details Referrals **Statuses** Check-In Waivers Picture

### STATUSES

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Payment Responsibility	Paying for Self	[Edit]		
POS - On Account	Ineligible	[Edit]		
Senior Fitness Program	Ineligible	[Edit]		
SMS Marketing	Subscribed	[Edit]		
Statement Status	None	[Edit]		
Suspended	No	[Edit]		

### ASSIGN MEMBERSHIP CHECK-IN STATUS

**Assign a Member**  
Enter first name...

**ADD** **CANCEL**

**NOTE:** in **Assign a Member** field, enter first name of current client account whose membership will provide their club/gym access

## Adding/Updating Senior Fitness Program Status (i.e. Insurance Program)

\* If you know the client's senior fitness program (i.e. Insurance Program) when creating their account, see [Adding A New Client Account "Senior Fitness Programs" section](#)

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] (in **Senior Fitness Program** row)

Jane McKenzie-Hill

- PROFILE** (Overview)
- ACCOUNT MANAGEMENT (General Details, Referrals)
- CONTRACTS** (Statuses)
- VISITS (Check-In Waivers)
- FINANCIAL (Picture)

### STATUSES

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Payment Responsibility	Paying for Self	[Edit]		
POS - On Account	Ineligible	[Edit]		
Senior Fitness Program	Ineligible	[Edit]		



### SENIOR FITNESS PROGRAM

Status Eligible	Program -Select-	Provider -Select-	ID Number
--------------------	---------------------	----------------------	-----------

Additional Information

**SAVE** **CANCEL**

**NOTE:** set **Status to Eligible** if client belongs to an Insurance Program, select **Program** and **Provider** (set Not Listed if provider not on list), enter **ID Number** (verify accuracy); set Status to Ineligible if client is no longer enrolled in the program

## Updating General Details (e.g. address, phone numbers, email)

After selecting a client account, top menu: **PROFILE** > **General Details** > **EDIT** > **SAVE** after making your updates

ACTIVE CLUB	John Doe	PROFILE	ACCOUNT MANAGEMENT	CONTRACTS	VISITS	FINANCIAL		
Seattle		Overview	<b>General Details</b>	Referrals	Statuses	Check-In Waivers		
<b>ACCOUNTS</b>								
First Name	<b>GENERAL DETAILS</b>							
Enter first name...	First Name	Last Name	Gender	Date of Birth	Joined	Account Type	Team ID	Group
	John	Doe	Male		Aug 12, 2014	Client		
Advanced Search	Home Club	Primary Rep	Occupation	Employer	Driver's License #			
New Account	Bodyz							
<b>POINT-OF-SALES</b>								
POS	<b>HOME ADDRESS</b>							
<b>VISITS</b>								
Check-Ins	Street Number, Name & Type		Unit/Suite/Apt					
Appointments								
Group Classes	Country	Province/State	City	Postal/Zip Code				
Programs	Canada	British Columbia	Kelowna					
<b>CONTRACTS</b>								
Memberships	<b>CONTACT DETAILS</b>							
Installment Plans	<b>The account needs a contact email.</b>							
Renewable Packages	Home Tel:	Work Tel: Ext	Mobile	Email (Username)	Contact Email	Bounced Email		
Programs				noemail				
<b>APPROVAL QUEUE</b>								
Memberships	Work Email	Emergency Contact	Emrg. Tel:	Emrg. Email	Pref. Contact	Pref. Language		
Installment Plans					Home Tel	English		
Change Requests	<b>REFERRAL DETAILS</b>							
<b>CRM HUB</b>								
Guest Passes	Source	Name/Details	Email	Primary Service				
Gift Cards								
Rentals								
CRM Events								
Billing Sources								
		<b>EDIT</b>	<b>PRINT</b>					

## Deleting Payment Responsibility

1. **For client account being paid for by another client** - after selecting a client account, top menu: **PROFILE > Statuses** > [Delete] (in **Payment Responsibility** row)

The screenshot shows the user interface for a client named Anna Kid. The top navigation bar includes 'PROFILE', 'ACCOUNT MANAGEMENT', 'CONTRACTS', 'VISITS', and 'FINANCIAL'. The 'PROFILE' tab is active, and the 'Statuses' sub-tab is selected. Below the navigation, a table lists various status types. The 'Payment Responsibility' row is highlighted in yellow, and the '[Delete]' button in its 'Action' column is also highlighted in red.

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Group Payer	Ineligible	[Edit]		
Payment Responsibility	Tara Brennan (1803)	[Delete]	Sep 18, 2022	Juan Carlos Garcia

**OR**

2. **For client account paying for other clients** - after selecting a client account, top menu: **PROFILE > Statuses** > [Delete All] (in **Payment Responsibility** row)

The screenshot shows the user interface for a client named Tara Brennan. The top navigation bar includes 'PROFILE', 'ACCOUNT MANAGEMENT', 'CONTRACTS', 'VISITS', and 'FINANCIAL'. The 'PROFILE' tab is active, and the 'Statuses' sub-tab is selected. Below the navigation, a table lists various status types. The 'Payment Responsibility' row is highlighted in yellow, and the '[Delete All]' button in its 'Action' column is also highlighted in red.

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Group Payer	Ineligible	[Edit]		
Payment Responsibility	Paying for 2 other accounts	[View] [Delete All]		

## Deleting Check-In Status

1. For client account whose check-in status is assigned to another client - after selecting a client account, top menu: **PROFILE** > **Statuses** > **[Delete]** (in **Check-In Status** row)

Geoff Craig

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

Overview General Details Referrals **Statuses** Check-In Waivers Picture

### STATUSES

Statuses

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Deborah Lavanaugh (14411)	<b>[Delete]</b>		
Collection	No	[Edit]		

**OR**

2. For client account that provides check-in status for all clients - after selecting a client account, top menu: **VISITS** > **Access** > **[Delete All]** (to delete all clients) **or** **[Del.]** (to delete a specific client)

Trevor Pierson-Roberts

PROFILE ACCOUNT MANAGEMENT CONTRACTS **VISITS** FINANCIAL

Settings **Access** Classes Appointments Check-Ins Guest Passes

### ACCESS

Check-In Status **[Delete All]**

Managing check-in status for Dalton Evans (11559) **[Del.]**, Denis Lyons (16120) **[Del.]**, Garrett Woodley (14967) [Del.], Nathalie Rancourt (12387) [Del.]

Barcode [Edit]  
none assigned

**OR**

3. For client account that provides check-in status for all clients - after selecting a client account, top menu: **CONTRACTS** > **Memberships** > **[Delete All]** (to delete all clients) **or** **[Del.]** (to delete a specific client)

Trevor Pierson-Roberts

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installment Plans **Memberships** Programs Charges

### MEMBERSHIP AGREEMENTS

Check-In Status **[Delete All]**

Managing check-in status for Dalton Evans (11559) **[Del.]**, Denis Lyons (16120) **[Del.]**, Garrett Woodley (14967) [Del.], Nathalie Rancourt (12387) [Del.]

## Viewing/Emailing Client Document

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Documents** > [**Print**] (to view document) or [**Email**] (to email document)

Andrew1 Parsons

PROFILE **ACCOUNT MANAGEMENT** CONTRACTS VISITS FINANCIAL

CRM Events Memo Notes Change Requests **Documents** Logs Ratings

### DOCUMENTS

Documents [Add]

Added	Type	Action	Delete
Jan 5, 2023 (5:55am)	Membership	<a href="#">Print</a> <a href="#">Email</a>	[Delete]
Nov 29, 2022 (2:09pm)	Account Statement	<a href="#">Print</a> <a href="#">Email</a>	[Delete]

## Deleting Client Document

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Documents** > [Delete]

Andrew1 Parsons

PROFILE **ACCOUNT MANAGEMENT** CONTRACTS VISITS FINANCIAL

CRM Events Memo Notes Change Requests **Documents** Logs Ratings

### DOCUMENTS

Documents [Add]

Added	Type	Action	Delete
Jan 5, 2023 (5:55am)	Membership	<a href="#">Print</a> <a href="#">Email</a>	<a href="#">[Delete]</a>
Nov 29, 2022 (2:09pm)	Account Statement	<a href="#">Print</a> <a href="#">Email</a>	[Delete]



## Emailing Mobile App Code

After selecting a client account, top menu: **PROFILE** > **Statuses** > **[Email Code]** (in **Mobile App** row)

Andrew1 Parsons	<b>PROFILE</b>	ACCOUNT MANAGEMENT	CONTRACTS	VISITS
	Overview	General Details	Referrals	<b>Statuses</b>

### STATUSES

Type	Status	Action	Date	By
Batch Processes	Yes	[Edit]		
Check-In Status	Managing <a href="#">[8 accounts]</a>	[Delete All]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Group Payer	Ineligible	[Edit]		
Mobile App	Invite Accepted	ios (push) [Revoke] <a href="#">[Email Code]</a> [View Code]		
Payment Responsibility	Paying for 3 other accounts	[View] [Delete All]		

## Updating Statement Status

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] (in **Statement Status** row) >

Update the Statement Status > **SAVE**

**ACTIVE CLUB**  
Kelowna ▾

**James Odum**

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

Overview General Details Referrals **Statuses** Check-In Waivers Picture

**ACCOUNTS**  
First Name ▾  
Enter first name...

▸ Advanced Search  
▸ New Account

**POINT-OF-SALES**  
▸ POS

**VISITS**  
▸ Check-Ins  
▸ Appointments  
▸ Group Classes  
▸ Programs

**CONTRACTS**  
▸ Memberships  
▸ Installment Plans  
▸ Renewable Packages  
▸ Programs

**APPROVAL QUEUE**  
▸ Memberships  
▸ Installment Plans  
▸ Change Requests

**CRM HUB**  
▸ Guest Passes  
▸ Gifts, Credits & Promos  
▸ Rentals  
▸ CRM Events

**STATUSES**

Statuses

Type	Status	Action	Date	By
Authorized Guardians	None	[Edit]		
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		
Group Payer	Ineligible	[Edit]		
Mobile App	Invite Active	[Email Code] [View Code]		
Payment Responsibility	Paying for Self	[Edit]		
POS - On Account	Ineligible	[Edit]		
Senior Fitness Program	Ineligible	[Edit]		
SMS Marketing	Subscribed	[Edit]		
<b>Statement Status</b>	<b>None</b>	[Edit]		
Suspended	No	[Edit]		

### STATEMENT

**Status**

None ▾

None

Both (Email and Print)

Email Only

Print Only

## Updating Collection Status

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] (in **Collection Row** row)

**ACTIVE CLUB**  
Kelowna ▾

**James Odum** **PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL  
Overview General Details Referrals **Statuses** Check-In Waivers Picture

**ACCOUNTS**  
First Name ▾  
Enter first name...  
▸ Advanced Search  
▸ New Account

**POINT-OF-SALES**  
▸ POS

**VISITS**  
▸ Check-Ins  
▸ Appointments  
▸ Group Classes  
▸ Programs

**STATUSES**

Statutes

Type	Status	Action	Date	By
Authorized Guardians	None	[Edit]		
Batch Processes	Yes	[Edit]		
Check-In Status	Self-Managed	[Edit]		
Collections	No	[Edit]		
Email Marketing	Subscribed	[Edit]		

### COLLECTIONS

**Status** <sup>1</sup>  
Yes ▾

**Note** <sup>2</sup>

**SAVE** **CANCEL**

### KEY FIELDS

1. **Status:** Update Collection Status to Yes or No
2. **Note:** If applicable, provide notes for the Collections

**SAVE**

# Booking Appointments (Daily Scheduler)

\* Booking Appointments may be done in a daily view or weekly view> See [Booking Appointments \(Weekly Scheduler\)](#)

Left-side menu: **VISITS > Scheduler** > Select Version (By Professional or By Resource) > Day of appointment > narrow field by selecting service type > click into open white slot for appointment under appropriate Staff or Resource column

**DAILY SCHEDULER - PHILADELPHIA**

Version: By Professional | Day: 2024/07/16 | Service Type: All

Buttons: WEEKLY SCHEDULER, REDEEM, PRINT 1, PRINT 2

Legend: Available, Unavailable

Time	Trainer O.	A Beliveau	C Johnson	Court ONE	Dana Rocket	Failed ACH	guest 1	J Carlos G.	Massage 1	Messages 3	Open Gym	T Ross
5:00am												
5:15												
5:30												
5:45												
6:00am												
6:15												
6:30												
6:45												
7:00am												
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11:45												
12:00pm												
12:15												
12:30												
12:45												
1:00pm												

**ACTIVE CLUB**  
Philadelphia ▾

**ACCOUNTS**  
First Name ▾  
Enter first name...

▸ Advanced Search  
▸ New Account

**MY QUICK LINKS**  
▸ Monthly Billing  
▸ memberships  
▸ TSN  
▸ All Links

**POINT-OF-SALES**  
▸ POS

**VISITS**  
▸ Check-Ins  
▸ Scheduler  
▸ Group Classes  
▸ Programs

**CONTRACTS**  
▸ Memberships  
▸ Installment Plans  
▸ Renewable Packages  
▸ Programs

**APPROVAL QUEUE**  
▸ Memberships  
▸ Installment Plans  
▸ Change Requests

**CRM HUB**  
▸ Passes

**DAILY SCHEDULER - PHILADELPHIA**

Version: By Resources ▾ Day: 2024/07/16 Service Type: All ▾ **WEEKLY SCHEDULER**

	A Studio	B Studio	Party Room
5:00am			
5:15		Program	
5:30		Swimaroo	
5:45		5:20-5:35	
6:00am			
6:15			
6:30			
6:45			
7:00am			
7:15			
7:30			
7:45			
8:00am			
8:15			
8:30			
8:45			
9:00am			
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9:30			
9:45			
10:00am			
10:15			
10:30			
10:45			
11:00am			
11:15			
11:30			
11:45			
12:00pm			
12:15			

**Tuesday, Jul 16, 2024** ✕

**Resource**  
B Studio

**Appointment Type**  
-Select- ▾

**Professional**  
Trainer One Test LongLastnan ▾

**Start Finish Weeks**  
5:45am 6:45am ▾  2 ▾

**Client**  Set Later **Balance**  
X

**Barcode** **Last Att. Visit**  
| |

**Sold Package** **Left**  
| |

**Note**  
| |

**BOOK** **BOOK & LOAD POS**

## KEY FIELDS

- Version:** Select to view scheduler by Resource/Room or Professional/Staff
- Appointment Type:** Select applicable appointment type
- Resource/Room:** If applicable, Select Resource/Room
- Start/Finish/Weeks:** Confirm appointment start and finish times. Adjust finish time, if needed
  - If appointment is recurring each week (same day and time), check box and select the # of weeks. The system will automatically save the appointments for the following weeks
- Client:** Enter client's name (by last name) > confirm accuracy Balance, Barcode, Last Att. Visit, Sold Package and Left fields will auto-populate **OR** Select **Set later** to enter the client at a later date.
  - see Alert: Eligible Packages note for possible package already purchased
- Note:** Add all relevant notes in the 'Note' field, if applicable
- BOOK:** Click to book appointment only **or BOOK & LOAD POS** – to book if you need to charge the client. You will be redirected to the POS page

# Updating Past Appointments (Daily Scheduler)

Left-side menu: **VISITS** > **Scheduler**

**ACTIVE CLUB**

Philadelphia ▾

**ACCOUNTS**

First Name ▾

Enter first name...

- Advanced Search
- New Account

**MY QUICK LINKS**

- Monthly Billing
- memberships
- TSN
- All Links

**POINT-OF-SALES**

- POS

**VISITS**

- Check-Ins
- Scheduler
- Group Classes
- Programs

**CONTRACTS**

- Memberships
- Installment Plans
- Renewable Packages
- Programs

**APPROVAL QUEUE**

- Memberships
- Installment Plans
- Change Requests

**CRM HUB**

- Passes
- Gifts, Credits & Promos
- Rentals
- CRM Events
- Billing Sources

**BATCH PROCESSES**

- Contracts
- Automated Billing
- Self-Managed Billing
- Payroll Deduct
- Statements
- Programs
- MTC

**DAILY SCHEDULER - PHILADELPHIA**

**Version**

By Resources ▾

**Day** ↔↔

2024/07/31

**Service Type**

All ▾

**WEEKLY SCHEDULER**

	A Studio	B Studio	Party Room
5:00am			
5:15			
5:30			
5:45			
6:00am		Program <b>Swimaroo</b>	
6:15		6:10-6:25	
6:30		Group Class <b>WEIGHT LOSS ONLY 2</b>	
6:45		6:35-7:15	
7:00am			
7:15			
7:30			
7:45			
8:00am			
8:15			
8:30			
8:45			
9:00am			
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11:00am			
11:15			
11:30			
11:45			
12:00pm			
12:15			
12:30			
12:45			
1:00pm			
1:15			
1:30			
1:45			
2:00pm			
2:15			
2:30			

**Wednesday, Jul 31, 2024** ✕

**Resource**  
B Studio

**Appointment Type**  
1 Hour Rental

**Professional**  
Trainer One Test ...

**Start**      **Finish**  
8:15am      8:30am

---

**Client**      **Balance**  
Mauna Test **\*OWED\***      -\$160.92

**Barcode**      **Contact**  
none assigned      [View]

**Sold Package**      **Left**  
Owed      -1

**Booked**      **By**  
Sep 5, 2024      Juan Carlos Garcia

**Note** [Edit]

NO SHOW FEE
NO SHOW
DEL.
POS

**ADD MORE CLIENTS**

## KEY FIELDS

1. **Version:** Select to view scheduler by Resource/Room or Professional/Staff
2. Find and click on the appointment
3. **Note:** Click [Edit] if you want to add a note > SAVE
4. **NO SHOW FEE:** Select if you are charging the client (1 session will be deducted from the package)  
**NO SHOW:** Select if you are not charging the client (1 session will be added back to the package)  
**DEL:** Select if you are deleting the appointment (deleted appointments cannot be retrieved)  
**POS:** Select if you need to charge the client (i.e. client does not have a package and you are charging a no show fee). You will be redirected to the POS page (see "Adding Point of Sale (POS) Purchase")

# Updating Future Appointments (Daily Scheduler)

Left-side menu: **VISITS** > **Scheduler**

**ACTIVE CLUB**

Seattle ▾

**ACCOUNTS**

First Name ▾

Enter first name...

- Advanced Search
- New Account

**POINT-OF-SALES**

- POS

**VISITS**

- Check-Ins
- Appointments
- Group Classes
- Programs

**CONTRACTS**

- Memberships
- Installment Plans
- Renewable Packages
- Programs

**APPROVAL QUEUE**

- Memberships
- Installment Plans
- Change Requests

**CRM HUB**

- Guest Passes
- Gift Cards
- Rentals
- CRM Events
- Billing Sources

**BATCH PROCESSES**

**DAILY APPOINTMENTS SCHEDULER - SEATTLE**

Day ◀▶ 2022/11/11    Service Type All ▾

WEEKLY SCHEDULER
PRINT 1
PRINT 2

	A bodyfit	A Wautier	A Support
5:00am			
5:15			
5:30			
5:45			
6:00am		GAIL BAILEY (Personal T)	
6:15			
6:30			
6:45			
7:00am			
7:15			
7:30			
7:45			
8:00am			
8:15			
8:30			
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10:00am			
10:15			
10:30			
10:45			
11:00am			
11:15			
11:30			
11:45			
12:00pm			
12:15			
12:30			

Friday, Nov 11, 2022

**With**  
Andrew Wautier

**Appointment Type**  
Personal Training

**Start**    **Finish**  
6:00am    7:00am

---

**Client**    **Balance**  
GAIL BAILEY    \$3.00

**Barcode**    **Contact**  
none assigned    [View]

**Sold Package**    **Left**  
50 Sessions    47

**Booked**    **By**  
Nov 5, 2022    Antaris Support

**Note** [Edit]

RESCHEDULE
DEL.
POS

## KEY FIELDS

1. Find and click on the appointment
  2. **Note:** Click [Edit] if you want to add a note > SAVE
  3. **RESCHEDULE:** Select if you are rescheduling the appointment on a different day and/or time. Then go to the new date, click on the time slot. All info will be copied over >BOOK
- DEL:** Select if you are deleting the appointment (deleted appointments cannot be retrieved)
- POS:** Select if you need to charge the client. You will be redirected to the POS page (see "Adding Point of Sale (POS) Purchase")



# Booking Appointments (Weekly Scheduler)

\* Booking Appointments may be done in a daily view or weekly view > See [Booking Appointments \(Daily Scheduler\)](#)

Left-side menu: VISITS > Scheduler > **Version** > **WEEKLY SCHEDULER**

**ACTIVE CLUB**  
Philadelphia

**DAILY SCHEDULER - PHILADELPHIA**

Version: By Professional | Day: 2024/07/17 | Service Type: All

**WEEKLY SCHEDULER**

	Trainer O.	A Beliveau	C Johnson	Court ONE	Dana Rocket
5:00am					
5:15					
5:30					
5:45					
6:00am					
6:15					
6:30					
6:45					
7:00am					
7:15					
7:30					
7:45					
8:00am					
8:15					
8:30					
8:45					

**ACTIVE CLUB**  
Philadelphia

**WEEKLY APPOINTMENTS SCHEDULER - PHILADELPHIA**

Professional | Court ONE

**DAILY SCHEDULER** | **PRINT APPTS.**

Week: Sunday, Jul 14, 2024 to Saturday, Jul 20, 2024

**Legend**  
Booked | Available | Unavailable

	Sun, Jul 14	Mon, Jul 15	Tue, Jul 16	Wed, Jul 17	Thu, Jul 18	Fri, Jul 19	Sat, Jul 20
5:00am							
5:15							
5:30							
5:45							
6:00am							
6:15							
6:30							
6:45							
7:00am							
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11:45							
12:00pm							
12:15							
12:30							
12:45							

**Wednesday, Jul 17, 2024**

**With**  
Court ONE

**Appointment Type**  
1 Hour Rental

**Resource/Room**  
A Studio

**Start** 6:30am | **Finish** 6:45am | **Weeks** 2

**Client**  Set Later | **Balance**

**Barcode**  | **Last Att. Visit**

**Sold Package**  | **Left**

**Note**

**BOOK & CLOSE**

**ACTIVE CLUB** Philadelphia

**WEEKLY APPOINTMENTS SCHEDULER - PHILADELPHIA**

**ACCOUNTS** Resource: A Studio

**First Name** Week: Sunday, Jul 14, 2024 to Saturday, Jul 20, 2024

**Legend**  
 Booked Available Unavailable

**MY QUICK LINKS**  
 Monthly Billing memberships TSN All Links

**POINT-OF-SALES**  
 POS VISITS Check-Ins Scheduler Group Classes Programs

**CONTRACTS**  
 Memberships Installment Plans Renewable Packages Programs

**APPROVAL QUEUE**  
 Memberships Installment Plans Change Requests

**CRM HUB**  
 Passes Gifts, Credits & Promos Rentals CRM Events Billing Sources

**BATCH PROCESSES**  
 Contracts Automated Billing Self-Managed Billing Payroll Deduct

	Sun, Jul 14	Mon, Jul 15	Tue, Jul 16	Wed, Jul 17	Thu, Jul 18	Fri, Jul 19	Sat, Jul 20
5:00am							
5:15							
5:30							
5:45							
6:00am							
6:15							
6:30							
6:45							
7:00am	abc abc (1 Rental H) w/ C Johnson *OWED*						
7:15							
7:30							
7:45							
8:00am							
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8:30							
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12:30							
12:45							
1:00pm							
1:15							
1:30							
1:45							

**KEY FIELDS**

- Version:** Select to view scheduler by Resource/Room or Professional/Staff
- Appointment Type:** Select applicable appointment type
- Resource/Room:** If applicable, Select Resource/Room
- Start/Finish/Weeks:** Confirm appointment start and finish times. Adjust finish time, if needed
  - If appointment is recurring each week (same day and time), check box and select the # of weeks. The system will automatically save the appointments for the following weeks
- Client:** Enter client's name (by last name) > confirm accuracy Balance, Barcode, Last Att. Visit, Sold Package and Left fields will auto-populate
  - see Alert: Eligible Packages note for possible package already purchased
- Note:** Add all relevant notes in the 'Note' field, if applicable
- BOOK:** Click to book appointment only **or BOOK & LOAD POS** – to book if you need to charge the client. You will be redirected to the POS page

# Applying Payment to Current Balance

After selecting a client account, top menu: **PROFILE** > **Overview** > **APPLY PAYMENT**

Steve Rogers

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

**Overview** General Details Referrals Statuses Check-In Waivers Picture

## OVERVIEW

Balance = **-\$100.00**

**APPLY PAYMENT**

**PROCESS POS**

## OR

After selecting a client account, top menu: **CONTRACTS** > **Charges** > **SELECT ACTION** > **Apply Payment**

Steve Rogers

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installment Plans Memberships Programs **Charges**

## CONTRACT CHARGES

Charges -> Set Criteria

**Due Date** **Type** **For**

From 2022/02/07 to 2024/02/07 All All

**PMT Status**

Approved  Charged  Declined  Deleted  Pending  Unapproved  Waived **UPDATE**

## [SUMMARY BY DATE]

Charges from Feb 7, 2022 to Feb 7, 2024

Date	Type	For	OBL	Amount	PMT Status	Method	Action	Proc. Date	Retries
Feb 1, 2024	Memb. Rec.	No		\$50.00	Pending	Online CC		Feb 1, 2024 [Edit] [Disable]	0
Feb 7, 2023	Memb. Int.	Yes		\$100.00	Charged	Online CC	[Rev.]	Feb 7, 2023 [Edit] [Disable]	0

## SELECT ACTION

Apply Payment

**GO**

**OR**

After selecting a client account, top menu: **FINANCIAL > Apply Payment**

Steve Rogers

PROFILE ACCOUNT MANAGEMENT CONTRACTS VISITS **FINANCIAL**

Receipts Purchases Billing Sources **Apply Payment** Account Activity

**APPLY PAYMENT TO AGREEMENT CHARGES**

The total charges eligible for a payment are \$100.00. Add Pending No

APPLY PAYMENT AGAINST All Charges

Eligible Charges (1)

Date	For	Type	PMT Status	Amount	<input checked="" type="checkbox"/>	Apply PMT	Balance
Feb 7, 2023	Initial	Membership	Charged	\$100.00	<input checked="" type="checkbox"/>	100.00	\$0.00

**APPLIED \$100.00**

Add Payment

1 Date	2 Method	3 Account	Amount	Change	4 Net PMT	Note	5 Receipt
2023/02/07	Card Present	At Club	100.00	0.00	100.00		Create

6

**SAVE AND EMAIL** **SAVE** **CANCEL**

**KEY FIELDS**

1. **Date:** Date of Payment
2. **Method:** Select Payment Method
3. **Amount:** Verify Payment Amount
4. **Note:** If applicable, make a note for the transaction
5. **Receipt:** Select correct "Create & Print" option for your printer
6. **SAVE AND EMAIL** if client wants a copy emailed or **SAVE**

# Applying Partial Payments

1. After selecting a client account, top menu: **PROFILE** > **Overview** > **APPLY PAYMENT**

Steve Rogers

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

**Overview** General Details Referrals Statuses Check-In Waivers Picture

## OVERVIEW

Balance = -\$100.00 **APPLY PAYMENT** **PROCESS POS**

**OR**

2. After selecting a client account, top menu: **CONTRACTS**>**Charges**>**SELECT ACTION**>**Apply Payment**

Steve Rogers

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installment Plans Memberships Programs **Charges**

## CONTRACT CHARGES

Charges -> Set Criteria

**Due Date** **Type** **For**

From 2022/02/07 to 2024/02/07 All All

**PMT Status**

Approved  Charged  Declined  Deleted  Pending  Unapproved  Waived **UPDATE**

### [SUMMARY BY DATE]

Charges from Feb 7, 2022 to Feb 7, 2024

Date	Type	For	OBL	Amount	PMT Status	Method	Action	Proc. Date	Retries
Feb 1, 2024	Memb. Rec.	No		\$50.00	Pending	Online CC		Feb 1, 2024 [Edit] [Disable]	0
Feb 7, 2023	Memb. Int.	Yes		\$100.00	Charged	Online CC	[Rev.]	Feb 7, 2023 [Edit] [Disable]	0

**SELECT ACTION**

Apply Payment **GO**

**OR**

3. After selecting a client account, top menu: **FINANCIAL > Apply Payment**

Steve Rogers

PROFILE ACCOUNT MANAGEMENT CONTRACTS VISITS **FINANCIAL**

Receipts Purchases Billing Sources **Apply Payment** Account Activity

**APPLY PAYMENT TO AGREEMENT CHARGES**

The total charges eligible for a payment are \$100.00. Add Pending No

1 2

APPLY PAYMENT AGAINST Select Charges set amount 75

Eligible Charges (1)

Date	For	Type	PMT Status	Amount	<input type="checkbox"/>	Apply PMT	Balance
Feb 7, 2023	Initial	Membership	Charged	\$100.00	<input checked="" type="checkbox"/>	75.00	\$25.00

APPLIED \$75.00

UNAPPLIED \$0.00

Add Payment

3 Date	4 Method	Account	5 Amount	Change	Net PMT	6 Note	7 Receipt
2023/02/07	Card Present	At Club	75.00	0.00	75.00		Create

8

SAVE AND EMAIL SAVE CANCEL

**KEY FIELDS**

1. **Apply Payment Against:** Change to Select Charges
2. **Set Amount:** Set amount for partial payment amount
3. **Date:** Date of Payment
4. **Method:** Select Payment Method
5. **Amount:** Verify Payment Amount
6. **Note:** If applicable, make a note of the transaction
7. **Receipt:** Select correct "Create & Print" option for your printer
8. **SAVE AND EMAIL** or **SAVE**

## Applying Payment to Future Charges

4. After selecting a client account, top menu: **PROFILE** > **Overview** > **APPLY PAYMENT**

Steve Rogers

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

**Overview** General Details Referrals Statuses Check-In Waivers Picture

### OVERVIEW

Balance = -\$100.00

**APPLY PAYMENT**

**PROCESS POS**

**OR**

5. After selecting a client account, top menu: **CONTRACTS**>**Charges**>**SELECT ACTION**>

Apply Payment

Steve Rogers

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installment Plans Memberships Programs **Charges**

### CONTRACT CHARGES

Charges -> Set Criteria

Due Date	Type	For
From 2022/02/07 to 2024/02/07	All	All

**PMT Status**

Approved  Charged  Declined  Deleted  Pending  Unapproved  Waived **UPDATE**

### [SUMMARY BY DATE]

Charges from Feb 7, 2022 to Feb 7, 2024

Date	Type	For	OBL	Amount	PMT Status	Method	Action	Proc. Date	Retries
Feb 1, 2024	Memb. Rec.	No		\$50.00	Pending	Online CC		Feb 1, 2024 [Edit] [Disable]	0
Feb 7, 2023	Memb. Int.	Yes		\$100.00	Charged	Online CC	[Rev.]	Feb 7, 2023 [Edit] [Disable]	0

**SELECT ACTION**

Apply Payment

**GO**

**OR**

1. After selecting a client account, top menu: **FINANCIAL > Apply Payment**

**Steve Rogers** PROFILE ACCOUNT MANAGEMENT CONTRACTS VISITS **FINANCIAL**

Receipts Purchases Billing Sources **Apply Payment** Account Activity

**APPLY PAYMENT TO AGREEMENT CHARGES**

The total charges eligible for a payment are **\$150.00**. **Add Pending** Yes

**APPLY PAYMENT AGAINST** All Charges

Eligible Charges (2)

Date	For	Type	PMT Status	Amount	<input checked="" type="checkbox"/>	Apply PMT	Balance
Feb 7, 2023	Initial	Membership	Charged	\$100.00	<input checked="" type="checkbox"/>	100.00	\$0.00
Feb 1, 2024	Recurring	Membership	Pending	\$50.00	<input checked="" type="checkbox"/>	50.00	\$0.00

**APPLIED \$150.00**

Add Payment

2	3	4	5	6			
Date	Method	Account	Amount	Change	Net PMT	Note	Receipt
2023/02/10	Card Present <input type="button" value="v"/>	At Club <input type="button" value="v"/>	150.00	0.00	150.00		Create <input type="button" value="v"/>

**7**

**KEY FIELDS**

1. **Add Pending:** Select Yes, this will pull any future pending charges on the account
2. **Date:** Date of Payment
3. **Method:** Select Payment Method
4. **Amount:** Verify Payment Amount
5. **Note:** If applicable, make a note for the transaction
6. **Receipt:** Select correct "Create & Print" option for your printer
7. **SAVE AND EMAIL** or **SAVE**

\*Note: Please refer to [Applying Partial Payments](#) to make partial payments towards future charges



# Creating Gift Cards/Certificates

Left-hand side: CRM HUB > Gifts, Credits & Promos > **ADD GIFT CARDS AND CERTIFICATES**

**ACTIVE CLUB**

Kelowna ▾

**ACCOUNTS**

First Name ▾

Enter first name...

▶ Advanced Search

▶ New Account

**POINT-OF-SALES**

▶ POS

**VISITS**

▶ Check-Ins

▶ Appointments

▶ Group Classes

▶ Programs

**CONTRACTS**

▶ Memberships

▶ Installment Plans

▶ Renewable Packages

▶ Programs

**APPROVAL QUEUE**

▶ Memberships

▶ Installment Plans

▶ Change Requests

**CRM HUB**

▶ Guest Passes

**▶ Gifts, Credits & Promos**

▶ Rentals

▶ CRM Events

▶ Billing Sources

**GIFTS, CREDITS AND PROMOS - KELOWNA**

**ADD GIFT CARDS AND CERTIFICATES**

Gifts, Credits & Promos -> Set Criteria

Type	Created	Status
All ▾	From 2020/06/06 to 2023/06/06	<input checked="" type="checkbox"/> Active <input type="checkbox"/> Deleted <input type="checkbox"/> Expired <input type="checkbox"/> Redeemed <input checked="" type="checkbox"/> Pending
Sold Date	Expiry Date	
set <input type="checkbox"/> From 2022/06/06 to 2023/06/06	set <input type="checkbox"/> From 2022/06/06 to 2023/06/06	<b>UPDATE</b>

Entries = 848

Number	Type	Created	Status	Sold	Buyer	Sale Amount	Balance	Expiry
911039	Card	Oct 8, 2020	Active [Exp.]	Dec 19, 2019	<a href="#">he_no</a>	\$20.00	\$20.00	none [Edit]
911223	Card	Oct 8, 2020	Active [Exp.]	Dec 17, 2019	<a href="#">GW1, Kel</a>	\$200.00	\$200.00	none [Edit]
911048	Card	Oct 8, 2020	Active [Exp.]	Dec 20, 2013	<a href="#">Three, Liste</a>	\$25.00	\$25.00	none [Edit]
911056	Card	Oct 8, 2020	Active [Exp.]	Dec 17, 2013	<a href="#">This, Try</a>	\$25.00	\$25.00	none [Edit]
911090	Card	Oct 8, 2020	Active [Exp.]	Oct 23, 2014	<a href="#">This, Try</a>	\$45.00	\$45.00	none [Edit]
911190	Card	Oct 8, 2020	Active [Exp.]	Mar 13, 2020	<a href="#">This, Say</a>	\$80.00	\$80.00	none [Edit]

## ADD GIFT CARDS AND CERTIFICATES - KELOWNA

Gift Cards and Certificates

1	2	3	4
Type	Number	Amount	Expiry Period
Copy type, amount and expiry period from 1st entry No <input checked="" type="radio"/> Yes <input type="radio"/>			
Card <input type="text"/>	123456789 <input type="text"/>	10 <input type="text"/>	<input type="checkbox"/> 12 months <input type="text"/>

5

SAVE

CANCEL

### KEY FIELDS

1. **Type:** Select Card or Certificate
2. **Number:** Enter Gift Card/Certificate Number
3. **Amount:** Enter Amount (set amount to \$0 if client can choose amount at point of sale)
4. **Expiry Period:** Enter Expiry Period (if applicable)
  - a. Expiry Period is set upon point of sale. For example, if Expiry Period is set to 12 months, the gift card will expire 12 months from the date of sale
5. **ADD:** (if creating more) > repeat steps 1-4 as needed

SAVE

## Selling Gift Cards/Certificates

Left-hand side: **POINT-OF-SALES>POS**

Select Category

Gift Cards	
Drinks	2
Adult Programs	123456789
Kids Programs	(\$10.00)
Medical Spa	
Passes	6 (\$0.00)
Class Packages	
HC Packages	
Gift Cards	1

### KEY FIELDS

Note: Follow steps 1-4 steps of [Adding Point of Sale \(POS\) Purchase \(Updated\)](#)

1. Select Category: Select Gift Cards
2. Select corresponding gift card

Note: Resume steps 7-10 of [Adding Point of Sale \(POS\) Purchase \(Updated\)](#)

## Applying Gift Cards/Certificates

Left-hand side: **POINT-OF-SALES>POS**

Note: Refer to Step 7 of [Adding Point of Sale \(POS\) Purchase \(Updated\)](#)

## Adding a Prepaid Credit or Promo

After selecting a client account, top menu: **FINANCIAL** > **Purchases** > **Gifts, Credits & Promos** >

### ADD PREPAID CREDIT OR PROMO

Steve Rogers

PROFILE ACCOUNT MANAGEMENT CONTRACTS VISITS **FINANCIAL**

Receipts **Purchases** Billing Sources Owed Charges Account Activity

**PURCHASES**

Select Type

Type

**Gifts, Credits & Promos**

Packages

Retail Products

Steve Rogers PROFILE

Receipts

**GIFTS, CREDITS AND PROMOS**

**ADD PREPAID CREDIT OR PROMO**

### ADD PREPAID CREDIT OR PROMO

1	2	3	4	5	6
Type	Number/Note	Payment Amount	Bonus	Total	Expiry Date
Credit	SAVE50	100	50	\$150.00	<input type="checkbox"/> Set 2023/06/13

7

**SAVE** **CANCEL**

Add Transaction

Date	Type	8 Method	Amount	Taxes	Total	Add Note
2023/06/13	Payment	Card Present	\$100.00	\$0.00	\$100.00	(1) Credit for \$150.00

### KEY FIELDS

1. **Type:** Select credit or promo option
2. **Number/Note:** Enter credit number or promo code number
3. **Payment Amount:** Enter credit amount being paid for
4. **Bonus:** If applicable, add any additional bonus credit as needed
5. **Total:** Verify total amount being credited
6. **Expiry Date:** If applicable, set expiry date
7. **SAVE:** This will open an Add Transaction table to take a payment
8. **Payment Method:** Select payment method and process payment

## Reloading a Gift Card

After selecting a client account, top menu: **FINANCIAL** > **Purchases** > Gifts, Credits & Promos > [Reload]

Steve Rogers

PROFILE ACCOUNT MANAGEMENT CONTRACTS VISITS **FINANCIAL**

Receipts **Purchases** Billing Sources Owed Charges Account Activity

### PURCHASES

Select Type

Type

Gifts, Credits & Promos

Packages

Retail Products

Entries = 2

Type	Number	Status	Sold	Amount	Balance	Expiry	Action
Credit	8642	Expired [Act.]	Jun 13, 2023	\$1.00	\$2.00	Jun 13, 2023	
Card	100012	Redeemed	Jun 13, 2023	\$2.00	\$0.00	none	[Reload]

### RELOAD GIFT CARD OR CERTIFICATE

Type	Number	Current Balance	<sup>1</sup> Amount	New Balance
Card	100012	\$0.00	10	\$10.00

<sup>2</sup>

**SAVE** **CANCEL**

Add Transaction

Date	Type	<sup>3</sup> Method	Amount	Taxes	Total	Add Note
2023/06/13	Payment	Card Present	\$10.00	\$0.00	\$10.00	(1) Top up for gift card 100

### KEY FIELDS

1. **Amount:** Enter amount being reloaded onto the card
2. **SAVE:** This will open an Add Transaction table to take a payment
3. **Payment Method:** Select payment method and process payment

# Waiving Charges

After selecting a client account, top menu: **CONTRACTS** > **Charges** > **SELECT ACTION** > **Waive Charges**

Paul Hartwell

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installment Plans Memberships Programs **Charges**

## CONTRACT CHARGES

Charges -> Set Criteria

**Due Date**                      **Type**                      **For**

From 2022/01/31 to 2024/01/31    All    All

**PMT Status**

Approved  Charged  Declined  Deleted  Pending  Unapproved  Waived **UPDATE**

### [SUMMARY BY DATE]

Charges from Jan 31, 2022 to Jan 31, 2024

Date	Type	For	OBL	Amount	PMT Status	Method	Action	Proc. Date	Retries
Feb 5, 2023	POS	Rec.	Yes	\$187.00	Charged	Other	[Rev.]	-	0
Jan 31, 2023	Memb.	Int.	Yes	\$110.00	Charged	Other	[Rev.]	-	0

**SELECT ACTION**

Apply Payment **GO**

Apply Payment

Apply Gift Card

Edit Declined Charges

**Waive Charges**

1. Select box for charges being waived (if partial, update the amount in the Apply Credit field) > Verify Total Credit Amount and to what account the credit is being applied to > Add Note if applicable > **SAVE**

## WAIVE CHARGES

Eligible Charges (2)

Date	Type	Status	Amount	<input type="checkbox"/> Apply Credit	Balance
Jan 31, 2023	Membership	Charged	\$110.00	<input type="checkbox"/>	\$110.00
Feb 5, 2023	POS	Charged	\$187.00	<input checked="" type="checkbox"/> 187.00	\$0.00

**APPLIED \$187.00**

Apply Credit Adjustment

Date	Total Credit	Account	Add Note
2023/01/31	187.00	At Club	

**SAVE** **CANCEL**

# Cancelling Memberships

After selecting a client account, top menu: **CONTRACTS** > **Memberships**

Tony Stark

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installation Plans **Memberships** Programs Charges

## MEMBERSHIP AGREEMENTS

### Exclude Criteria

Expired (Not Check-In)  **UPDATE**

Agreements [Add]

Sold	By	For	Type	Agmt #	Status	Start	Expiry	Check-In
Jan 21, 2023	Paul Hartwell	Gym Membership	BASIC		Active	Jan 21, 2023	Dec 31, 2023	<input checked="" type="checkbox"/>
Jan 21, 2023	Antaris Antaris	Admin	Annual Fee		Active	Jan 21, 2023	May 3, 2023	<input type="checkbox"/>

## MANAGE BATCH MEMBERSHIPS

Cancel Agreements  **GO**

## CANCEL BATCH MEMBERSHIPS

### CANCELLING MEMBERSHIPS

Be careful when selecting a membership's current expiry as all of its pending recurring charges that are scheduled on or after that selected expiry date will be deleted. Once a membership has been cancelled, you cannot use that membership for adding new recurring charges.

Eligible Memberships (2)

Copy selections made from 1st membership to other memberships No  Yes

1	Type	Status	Start	Latest Charge	2	Current Expiry	Set to CXL	3	Reason
<input type="checkbox"/>	Annual Fee	Active	Jan 21, 2023	May 1, 2023		2023/05/03	No		-Select-
<input checked="" type="checkbox"/>	BASIC	Active	Jan 21, 2023	Dec 1, 2023		2023/01/28	No		Moving

**SAVE** **CANCEL**

## KEY FIELDS

- Select Membership:** Select any or all memberships being cancelled
- Current Expiry:** Client's last access date. Any pending invoices after this date will be deleted
- Reason:** Select reason for cancellation, if applicable

**OR**

After selecting a client account, top menu: **CONTRACTS** > **Memberships** > Select Membership being cancelled > **Cancel Agreement** > **GO**

John Doe

PROFILE ACCOUNT MANAGEMENT **CONTRACTS** VISITS FINANCIAL

Renewable Packages Installation Plans **Memberships** Programs Charges

**MEMBERSHIP AGREEMENTS**

Check-In Status [Delete]  
Membership check-in status assigned to **WILLIAM Cash (16358)**.

Exclude Criteria  
Expired (Not Check-In)  **UPDATE**

Agreements [Add]

Sold	By	For	Type	Agmt #	Status	Start	Expiry
Jan 17, 2023	Paul Hartwell	Gym Membership	BASIC		Active	Jan 17, 2023	Jul 1, 2023
Jan 17, 2023	Antaris Antaris	Admin	Annual Fee		Active	Jan 17, 2023	May 3, 2023

Auto-Renew Recurring Charges

- Back to Agreements
- Add Electronic Signature
- Assign Rental
- Cancel Agreement**
- Edit Agreement Type, # and Commission
- Edit Auto-Renew Recurring Charges
- Edit Expiry
- Edit Sold and Start Date
- Freeze Agreement
- Set To NSF Status

Back to Agreements **GO**

**KEY DATES**

**RECURRING CHARGES**

Be careful when selecting a membership's current expiry as all of its pending recurring charges that are scheduled on or after the selected date will be deleted. Once a membership has been cancelled, you cannot use that membership for adding new recurring charges.

Sold	Start Date	Initial Expiry <sup>1</sup>	<b>Current Expiry</b>	Cancelled	By <sup>2</sup>	Reason
Jan 17, 2023	Jan 17, 2023	Jul 1, 2023	2023/07/01			-Select-

**KEY FIELDS**

1. **Current Expiry:** Client's last access date. Any pending invoices after this date will be deleted
2. **Reason:** Select reason for cancellation, if applicable



## Updating Home Club

After selecting a client account, top menu: **PROFILE** > **General Details** > Edit Home Club

Note: this option to update the 'Home Club' will only appear if a) the client does not have any "pending" Membership charges (i.e. they can't have a membership with ongoing monthly payments) OR b) the client doesn't have its payment responsibility assigned to another client.

**Steve Rogers**

**PROFILE** ACCOUNT MANAGEMENT CONTRACTS VISITS FINANCIAL

Overview **General Details** Referrals Statuses Check-In Waivers Picture

### GENERAL DETAILS

**First Name** Steve **Last Name** Rogers **Gender** Male **Date of Birth** July 4 1920

**Joined** February 7 2023 **Account Type** Client **Team ID** **Group**

**Home Club** Kelowna **Primary Rep** Paul Hartwell **Occupation** **Employer** **Driver's License #**

**Home Club** dropdown menu:

- Kelowna
- Vernon
- Childcare
- Calgary

**Address, Name & Type** **Unit/Suite/Apt**

Yes

## Assigning Payment Terminals

Left-side menu: **ADMIN** > **System Settings** > Policies > Payment Terminals > Verify terminal being used by the Terminal HSN number > **ASSIGN TO THE DEVICE**

**Note:** The User account must have the permission "Managing system settings" enabled in order to assign a payment terminal.

Change requests

**CRM HUB**

- Guest Passes
- Gift Cards
- Rentals
- CRM Events
- Billing Sources

**BATCH PROCESSES**

- Marketing Campaigns
- Contracts
- Automated Billing
- Self-Managed Billing
- Payroll Deduct
- Statements
- Programs

**REPORTS**

- Financial
- Visits
- Inventory
- Clients
- Staff

**ADMIN**

- Received Inventory
- Groups
- System Settings**
- User Manual
- Contact Antaris

Message Templates

Mobile App

On-Demand Classes

Payment Responsibility Relationships

Packages

**Policies**

Programs

Ratings

Rentals

Retail Products

Resources and Rooms

Senior Fitness Programs

Staff

NSF Charges

Online Credit Card Pre-Authorized Payments

Payment Receipt

**Payment Terminals**

Point-of-Sale Page

Printing Agreements Restrictions

Sales Tax

### PAYMENT TERMINALS - KELOWNA

**Connected Terminals**

Terminal HSN: **17247PP83373161**  
Status: **Unassigned**  
**ASSIGN TO THIS DEVICE**

Terminal HSN: **18173PP84190922**  
Status: **Attached to another device.**  
**ASSIGN TO THIS DEVICE**

# Creating End of Day Cash Receipts Report

Left-side menu: **REPORTS** > **Financial** > Cash Receipts (Daily)

ACTIVE CLUB  
Kelowna

ACCOUNTS  
First Name  
Enter email...

Advanced Search  
New Account

VISITS  
Check-Ins

CONTRACTS  
Memberships  
Installation Plans  
Renewable Packages  
Programs

**REPORTS**  
Financial

FINANCIAL REPORTS - CALGARY

Select

Report

- Account Balance
- Adjustments
- A/R Aging Analysis (By Client)
- A/R Aging Analysis (By Payer)
- Cash Receipts (Daily)**
- Cash Receipts (Summary)
- Custom Export
- Gift Card Redemptions
- NSE Charges

CASH RECEIPTS (DAILY) - NASHVILLE

1 Date: From 2023/02/01 to 2023/02/11

2 Account: All

3 Transaction Type:  GC Redemptions  Payments  Reversals  Refunds

4 Pmt/Rev/Ref Method: All Types, ACH, AMEX, Cash

5 Added By: All, Antaris, Apply Payment Test, Cool Manager

\* Hold down 'Ctrl' or 'Command' to select multiple options and to unselect an option.

UPDATE

Feb 1, 2023 to Feb 11, 2023

Date (Time)	Type	For	Description	Method	Total	By	Trans. #
Feb 10, 2023 (11:54am)	Payment	Fireman Parish, East Jefferson	{DIANE COMBS, 1981}: (1) Americano (both tax)   (1) chirill test product   (1) Nutrition 1 MNTH	Cash	\$20.00	JP	
Feb 4, 2023 (8:04pm)	Payment	COMBS, DIANE	(1) Special Latte Sm	Cash	\$2.00	JP	

## KEY FIELDS

1. **Date:** Set date range
2. **Account:** Select All or specific account
3. **Transaction Type:** Check transaction types
4. **Payment/Reverse/Refund Method:** Select all or specific method(s)
5. **Added By:** Select all or specific staff account(s)

Note: At the end of the report, there is a Summary Information of the totals

# Contacting Antaris

Left-side menu: **SUPPORT** > **Contact Antaris** > Submit question to Antaris by filling out this form with accurate contact information and a detailed question.

**ACTIVE CLUB**

Childcare ▾

**ACCOUNTS**

First Name ▾

Enter first name...

▶ Advanced Search

▶ New Account

**VISITS**

▶ Check-Ins

▶ Programs

**CONTRACTS**

▶ Memberships

▶ Installment Plans

▶ Renewable Packages

▶ Programs

**REPORTS**

▶ Financial

▶ Visits

▶ Inventory

▶ Clients

▶ Staff

**ADMIN**

▶ Received Inventory

▶ Groups

▶ System Settings

**SUPPORT**

▶ User Manual

▶ **Contact Antaris**

**MY ACCOUNT**

## CONTACT ANTARIS

Got a question? We look forward to hearing from you. Please email us your question, and we'll respond within a couple of business hours. When detailing your question, should it concern a specific client account then kindly indicate their Client ID, which can be located on their Profile > Overview page.

**Name**  
John Doe

**Email Address**  
johndoe@antaris.us

**Phone Number**  
5555555555

**Call Requested**  
No ▾

**Subject**

**Question**

**Image**  
 No file chosen

**SEND QUESTION**