Membership Settings

Techs can easily sell memberships using prebuilt forms and templates, from their mobile apps.

At best, your membership will cover the cost of the services you guarantee your customers as part of their privilege as members. A well-designed and executed membership will give you that opportunity and keep customers satisfied for a long time.

When set up and assigned, IndusTrack automatically creates all the services for the membership. You can adjust discounts in setup or on the fly.

Set up the membership details and customize the benefits and features of each.

To set up Memberships go to Settings > Membership.

IndusTrack MAP	CUSTON	IER ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		🕰 📮 😧 🔅
¥ Field Employees	¢	Silver Gold	Platinum							I
R Vehicle Tracking	٤			Disabled						1
Reminders				Name	Silver					
Reports	¢			Description						
Mobile App									h	
🗊 Membership				Billing Type	* Pric	e \$				
Ma Inventory	د			Default Term	12					
Scheduling	٢	Recurring Service	(5)							
O Timesheet	٢	Job Template			Task Te	mplate			Recurring	
Client	¢	Select Job Temp	plate to Add	*						
₿ Integrations	٢									
Form settings	¢							SAVE		
Templates	٢									
Subscription										

In IndusTrack, you will be able to set up 3 types of membership. By default, these 3 are named Silver, Gold, and Platinum. Each can be renamed and set up individually.

IndusTrack MAP	CUSTOMER	ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		220	P 0	• • •	9
✗ Field Employees	٢	Silver Gold	Platinum										1
R Vehicle Tracking	د			Disabled									
Reminders				Name	Silver								
Reports	¢			Description									
Mobile App									h.				
Membership				Billing Type	▼ Price	s							
🔜 Inventory	¢			Default Term	12								
🗑 Scheduling	¢	Recurring Service(s	;)										
Timesheet	¢	Job Template			Task Ter	nplate			Recurring				
Client	¢	Select Job Templ	late to Add	*									
C Integrations	¢												
Form settings	¢							SAVE					
Templates	¢												

Memberships set up, though done individually, are similarly completed.

To start setting up (or editing) a membership, go to one of the 3 tabs.

IndusTrack MAP	CUSTOMER	ESTIMATES SCHEDULE	INVOICES	TIMESHEET SNOWTRACK	P.O. REPORTS		🕰 🖵 🛛 🔅 🕲
🎇 Field Employees	۲	Silver Gold Platinum	1				
R Vehicle Tracking	۰ L	1	Disabled	0			
Reminders			Name	Silver			
Reports	٩		Description				
Mobile App						11	
Membership			Billing Type	♥ Price \$			
🔛 Inventory	¢		Default Term	12			
Scheduling	د	Recurring Service(s)					
Timesheet	۲	Job Template		Task Template		Recurring	
Client	¢	Select Job Template to Add	•				
Ø Integrations	¢						
Form settings	¢				SAVE		
Templates	¢						

The **Disabled checkbox** is unticked by default. This means that the Membership plan is enabled/active and can be used (sold, added to contracts, or availed). Tick the checkbox to disable/deactivate.

IndusTrack MAP	CUSTOME	R ESTIMATES SCHEDUL	E INVOICES	TIMESHEET SNOWTRACK	P.O. REPORTS		20 🗘 🗘 🕺
¥ Field Employees	¢	Silver Gold Platinum		/			
R Vehicle Tracking	¢		Disabled				
Reminders			Name	Silver			
Reports	¢		Description				
Mobile App						h	
E Membership			Billing Type	▼ Price \$			
🔜 Inventory	¢		Default Term	12			
Scheduling	¢	Recurring Service(s)					
O Timesheet	¢	Job Template		Task Template		Recurring	
Client	¢	Select Job Template to Add	*				
	¢						
Form settings	¢				SAVE		
Templates	٢						

Name

The *Name* refers to the **Membership Plan/Program Name**. If preferred, replace the default name or leave it as is. Replacing the default Membership Name is not mandatory. This name can be retained and replaced at any time.

If the Name field is edited, the tab name automatically gets updated as well.

IndusTrack MAP	CUSTOM	R ESTIMATES SCHEDULE	INVOICES	TIMESHEET SNOWTRACK	P.O.	REPORTS		🖳 🗅 🚯 🔅
🗶 Field Employees	¢	Prestige Gold Platinum						
R Vehicle Tracking	¢		Disabled					
Reminders			Name	Prestige				
Reports	¢		Description				-	
Mobile App						ĥ		
Membership			Billing Type	* Price \$				
🔛 Inventory	¢		Default Term	12				
Scheduling	¢	Recurring Service(s)						
Timesheet	¢	Job Template		Task Template			Recurring	
Client	¢	Select Job Template to Add	Ŧ					
Ø Integrations	¢							
Form settings	•					SAVE		
Tamplatec								

Description

In this field, key in the details about the membership such as inclusions, exclusions, special rates, benefits, and/or percentage/fixed discounts.

IndusTrack MAP	CUSTOM	ER ESTIM	IATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		220 <u>,</u> 🗘 🕖	\$ (
X Field Employees	¢	Prestige	Gold	Platinum								
R Vehicle Tracking	¢				Disabled							
Reminders					Name	Prestige						
Reports	¢				Description				e Membership. As a member of this ve offers, access to our Prestige			
Mobile App									eck-out lanes and so much more.			
Membership					Billing Type	▼ Price	:e \$					
H Inventory	¢				Default Term	12						
Scheduling	٠	Recurring	Service(s)								
O Timesheet	¢	Job Temp	plate			Task Ter	mplate			Recurring		
Client	¢	Select	Job Tempi	ate to Add								
Ø Integrations	¢											
Form settings	¢								SAVE			
Templates	¢											

Billing Type

In this field, select from the drop-down list how frequently the customer will be billed.

- Once One-time payment
- Monthly
- Quarterly
- Twice a Year

IndusTrack MAP	CUSTON	IER ESTIM	IATES	SCHEDULE	INVOICES	TIMESHEET SNOWTRACK P.O. REPORTS	220	P (0 🗘
X Field Employees	٠	Prestige	Gold	Platinum					
Nehicle Tracking	٠				Disabled	0			
Reminders					Name	Prestige			
Reports	۲				Description	Exclusivity does have its perks with Prestige Membership. As a member of this			
Mobile App						elite program, you will get to enjoy exclusive offers, access to our Prestige Lounge & Events, priority and courtesy check-out lanes and so much more.			
E Membership					Billing Type	Once s			
🗮 Inventory	•				Default Term	Monthly			
Scheduling	٢	Recurring	Service(s)			Quarterly Twice a year			
Timesheet	¢	Job Temp	plate			Task Template Recurring			
E Client	۰.	Select J	lob Templa	te to Add					
2 Integrations	د								
Form settings	•					SAVE			
Templates	<					—			

Price

Key in the membership price in this field.

IndusTrack MAP	CUSTOM	ER ESTIMATES SCHEDULE	INVOICES	TIMESHEET SNOWTRA	CK P.O.	REPORTS		ni 🖒 🕹 🤹
Office Users		Prestige Gold Platinum						
¥ Field Employees	¢		Disabled	D				
K Vehicle Tracking	٢		Name	Prestige				
Reminders			Description			ge Membership. As a member of clusive offers, access to our	n	
Reports	¢					urtesy check-out lanes and so	h.	
Mobile App			Billing Type	▼ Price \$ 60				
Membership			Default Term					
🗮 Inventory	د	Recurring Service(s)						
Scheduling	¢	Job Template		Task Template			Recurring	
Imesheet	٢	Select Job Template to Add	*					
Client	~							
Portal Access Settings						SAVE		

Default Term

This refers to the terms of payment.

IndusTrack MAP	CUSTOME	R ESTIMATES SCHEDULE	INVOICES	TIMESHEET SNOWTRACK P.O. REPORTS		🕰 📮 🛛 🌻 (
Soffice Users	[Prestige Gold Platinum				
💥 Field Employees	¢		Disabled			
R Vehicle Tracking	¢		Name	Prestige		
Reminders			Description	Exclusivity does have its perks with Prestige Membership. As a member of this elite program, you will get to enjoy exclusive offers, access to our	* *	
Reports	¢			Prestige Lounge & Events, priority and courtesy check-out lanes and so	4	
Mobile App		-	Billing Type	▼ Price \$ 60		
Membership			Default Term	90		
M Inventory	¢	Recurring Service(s)				
Scheduling	¢	Job Template		Task Template	Recurring	
0 Timesheet	¢	Select Job Template to Add				
E Client	~					
Portal Access Settings				SAVE		
Portal Access				_		

Recurring Service(s)

Under **Recurring Services**, add or set up the service/s generally offered in the membership on an ongoing basis and paid for in a regular term.

IndusTrack MAP	CUSTOM	ER ESTIMATES SCHEDULE	INVOICES	TIMESHEET SNOWTRACK P.O. REPORTS		👼 🗘 🔞 🔅
Office Users		Prestige Gold Platinum				
⊁ Field Employees	٢		Disabled	0		
R Vehicle Tracking	•		Name	Prestige		
Reminders			Description	Exclusivity does have its perks with Prestige Membership. As a member of this elite program, you will get to enjoy exclusive offers, access to our		
Reports	¢			Prestige Lounge & Events, priority and courtesy check-out lanes and so	4	
Mobile App			Billing Type	▼ Price \$ 60		
Membership			Default Term	90		
M Inventory	¢	Recurring Service(s)				
🗎 Scheduling	•	Job Template		Task Template	Recurring	
O Timesheet	¢	Select Job Template to Add	٣			
Client	~					
Portal Access Settings				SAVE		
Portal Access						

Set up the Recurring Service(s)

Although not a requirement, create special Job and Task templates specific for <u>Membership plan holders</u>. You can make the program attractive and stand out from the regular services provided.

Select a Job Template from the drop-down list.

IndusTrack MAP	CUSTOM	IER ESTIMATES SCHEDULE INVOICES	TIMESHEET SNOWTRACK P.O. REPORTS	🖳 🖓 😧 💠 🌚
🛪 Field Employees	¢	Prestige Gold Platinum		
B Vehicle Tracking	٢	Disabled	0	
Reminders		Name	Prestige	
Reports	٢	Description	Exclusivity does have its perks with Prestige Membership. As a member of thi elite program, you will get to enjoy exclusive offers, access to our Prestige	is
Mobile App			Lounge & Events, priority and courtesy check-out lanes and so much more.	li.
Membership		Billing Type	▼ Price \$ 60	
Max Inventory	¢	Default Term	90	
Scheduling	¢	Recurring Service(s)		
O Timesheet	¢	Job Template	Task Template	Recurring
Client	٢	Electrical System Upgrade for Solar Panels Install		
Ø Integrations	¢	Electrical System Upgrade (ACU Install)		
Form settings	٠	HVAC System Install HVAC System Quraterly Maintenance	SAVE	
Templates	٠	Prestige Members HVAC Services		
Subscription		·		

Selecting a Job Template will enable the Task Template and Recurring fields.

Select the Task Template associated with the Job.

IndusTrack	MAP	CUSTOME	R ESTIN	IATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPO	DRTS		220	2 0	\$ @
X Field Emplo	cking	с , с	Prestige	Gold	Platinum	Disabled Name Description					ership. As a member of t	his			
Mobile App						Billing Type	Lounge & E				ines and so much more.	li.			
🕍 Inventory		¢				Default Term	90								
🗎 Scheduling		٢	Recurring	service(s)				/	_					
O Timesheet		٢	Job Tem	plate			Task Temp	plate				Recurring			
Client		٢	-				Not defined					Ø			8
Ø Integration:	5	٢	Select	Job Templ	ate to Add			m Evaluation							
🖹 Form settin	85	٤						stem Upgrade (ACU I	stall)						
Templates		٠					HVAC System	m Installation (4 Uni	5)	SAVE					
Subscription	n						Exclusive M	lembers' Service	_		•				

Set up the Frequency of the Services

To start the frequency set up click the repeat icon.

IndusTrack MAP	CUSTOM	ER ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS			220	0	۵ 🜣
🗙 Field Employees	¢	Prestige Gold	Platinum										
Nehicle Tracking	¢			Disabled									
Reminders				Name	Prestige								
Reports	¢			Description				e Membership. As a member of Iusive offers, access to our	A				
Mobile App								rtesy check-out lanes and so	•				
Membership				Billing Type	* Price	s 60							
M Inventory	•			Default Term	90					/			
Scheduling	٠	Recurring Service(5)										_
O Timesheet	•	Job Template			Task Temp	late			Recurring				
Client	•	•			*				0			8	I
Integrations	¢	Select Job Temp	late to Add	÷									
Form settings	¢												
Templates	٠							SAVE					
Subscription								SAVE					

Select if the recurrence will be Weekly or Monthly.

IndusTrack MAP	CUSTOM	ER ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS	📫 🗅 🚯 🌣 🕲
🗶 Field Employees	¢	Prestige Gold	Platinum						
Kehicle Tracking	¢			Disabled					
Reminders				Name	Prestige				
Reports	¢			Description				Membership. As a member of	
Mobile App				_				usive offers, access to our vesy check-out lanes and so	
Membership			Edit recu	rring		-		×	
M Inventory	¢		O Wee	kly					
Scheduling	¢	Recurring Service(s) Mon	thly					
O Timesheet	¢	Job Template	_					CLOSE SAVE	
Client	¢	•			*			0	8
Ø Integrations	¢			*					
Form settings	¢								
Templates	¢								
Subscription								SAVE	

Complete the setup based on the selected recurrence. Once the Recurrence setup is complete, Save this.

Weekly Recurrence

Click the radio button of Weekly.

On the "Recur every" field, indicate the rate at which the service will happen or occur in weekly terms. This could be every week (1) or every (2) weeks or whatever rate is preferred.

Select, by ticking the checkbox, the specific day(s) of the week the service will be performed.

IndusTrack MAP	CUSTOM	ER ESTIMATES	SCHEDULE INVOICES	TIMESHEET	SNOWTRACK	P.O. REPORT	2	💐 🗅 🛛 🎄 🕲
X Field Employees	¢	Prestige Gold	Platinum					
Vehicle Tracking	¢		Disabled					
Reminders			Name	Prestige				
Reports	¢		Description	Exclusivity d	oes have its perks wi	th Prestige Membersh	ip. As a member of 🔺	
Mobile App			Edit recurring				×	
Membership			Weekly					
Man Inventory	<		Recur every	Monday	week(s) or	Wednesday		
🛱 Scheduling	¢	Recurring Service(s)	Thursday	Friday	Saturday			
O Timesheet	۲	Job Template	O Monthly				_	
Client	¢	•					CLOSE SAVE	
Ø Integrations	¢	Select Job Template	e to Add 🔹					
Form settings	¢							
Templates	¢					SAVE		
Subscription						SAVE		

Monthly Recurrence

Click the radio button of Monthly.

On the "Day" field indicate the specific day of the month the service will be performed.

Select, by ticking the checkbox, the specific month(s) of the year the service will be performed.

IndusTrack MAP	CUSTOM	IER ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS				2	\$ 🗆 0	۵ ۵
💥 Field Employees	۲	Prestige Gold	Platinum											
B Vehicle Tracking	۲			Disabled										
Reminders				Name	Prestige									
Reports	¢													
Mobile App			Edit rec	urring						×				
Membership			O we	-										
Mark Inventory	۲		Mo Da	y 8		of every month(s)								
Scheduling	۲	Recurring Service(s)		January May	🗹 Februar		March	🗌 April 🔽 August						
O Timesheet	¢	Job Template		September	C Octobe		November	Decemi						
E Client	<	-							CLOSE	SAVE				1
Ø Integrations	¢	Select Job Templa	te to Add	Ŧ										
Form settings	۲													
Templates	٤							SAVE						
Subscription														

The frequency or recurrence will be added to the selected Job and Task templates.

IndusTrack MAP	CUSTOM	ER ESTIMATES	SCHEDULE	INVOICES	TIMESHEET	SNOWTRACK	P.O.	REPORTS		220	• (0 0	. (
¥ Field Employees	٢	Prestige G	old Platinum										
R Vehicle Tracking	٢			Disabled									
Reminders				Name	Prestige								
Reports	¢			Description				Membership. As a member o	f 👘				
Mobile App								usive offers, access to our tesy check-out lanes and so	•				
Membership				Billing Type	* Price	e\$ 60							
Max Inventory	¢			Default Term	90								
Scheduling	¢	Recurring Servi	ice(s)										٦
O Timesheet	¢	Job Template			Task Templ	late			Recurring				
Client	¢								Type: Monthly (Day 8 of every month(s)) February				
2 Integrations	¢	•			*				May August		Î		
Form settings	¢								November				
Templates	¢	Select Job Te	emplate to Add	*									1
Subscription													

Add another set of recurring services by selecting another Job template and completing the setup. Add as many services as may be needed to complete the membership package.

Save the updated Membership.

Assigning Membership

Once Memberships have been completely set up, these can be offered to your customers and easily added to their Address Book. Make them feel that they can get value for their money with discounts, special rates, and other premium benefits.