

Membership Settings

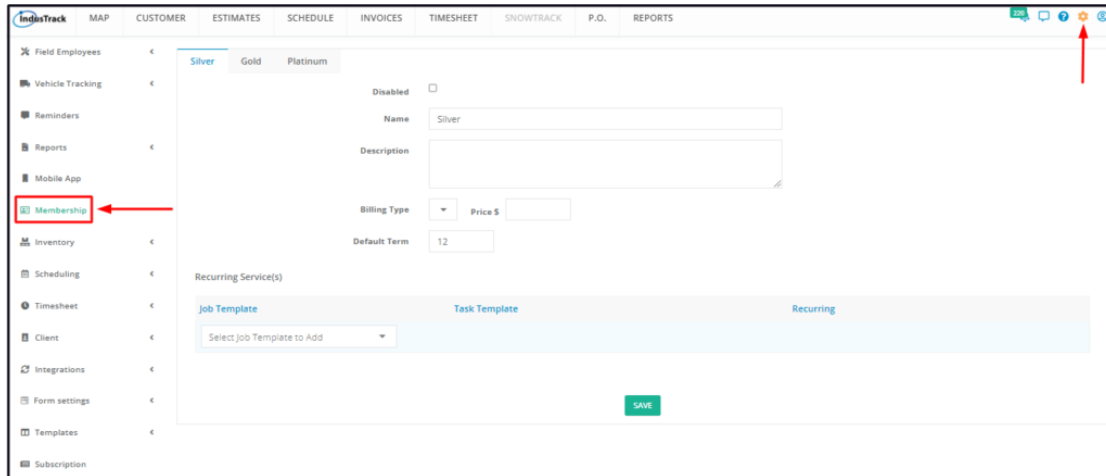
Techs can easily sell memberships using prebuilt forms and templates, from their [mobile apps](#).

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.

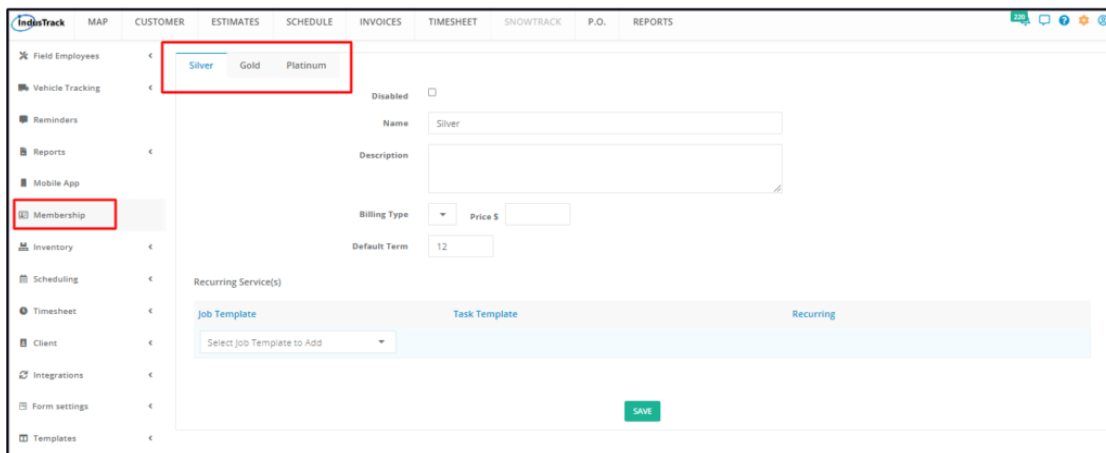
When set up and assigned, IndusTrack automatically creates all the services for the membership. You can adjust discounts in setup or on the fly.

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

To set up Memberships go to **Settings > Membership**.



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.



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

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

The screenshot shows the 'Silver' membership plan configuration in the IndusTrack software. The 'Disabled' checkbox is unchecked, indicating the plan is active. The 'Name' field is set to 'Silver', and the 'Default Term' is 12. A red box highlights the 'Silver' tab and the 'Disabled' checkbox.

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.

The screenshot shows the 'Silver' membership plan configuration in the IndusTrack software. The 'Disabled' checkbox is now checked, indicating the plan is disabled. The 'Name' field is set to 'Silver', and the 'Default Term' is 12. A red box highlights the 'Disabled' checkbox.

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.

The screenshot shows the 'Prestige' membership plan configuration in the IndusTrack software. The 'Name' field has been updated to 'Prestige', and the tab name has also changed to 'Prestige'. A red box highlights the 'Prestige' tab and the 'Name' field.

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 CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

Prestige Gold Platinum

Disabled

Name Prestige

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 Prestige Lounge & Events, priority and courtesy check-out lanes and so much more.

Billing Type Price \$

Default Term 12

Recurring Service(s)

Job Template Task Template Recurring

Select Job Template to Add

SAVE

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 CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

Prestige Gold Platinum

Disabled

Name Prestige

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 Prestige Lounge & Events, priority and courtesy check-out lanes and so much more.

Billing Type Once

Default Term Monthly

Quarterly

Twice a year

Recurring Service(s)

Job Template Task Template Recurring

Select Job Template to Add

SAVE

Price

Key in the membership price in this field.

IndusTrack MAP CUSTOMER ESTIMATES SCHEDULE INVOICES TIMESHEET SNOWTRACK P.O. REPORTS

Prestige Gold Platinum

Disabled

Name Prestige

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 Prestige Lounge & Events, priority and courtesy check-out lanes and so

Billing Type Price \$ 60

Default Term

Recurring Service(s)

Job Template Task Template Recurring

Select Job Template to Add

SAVE

Default Term

This refers to the terms of payment.

The screenshot shows the 'Prestige' membership configuration page. The 'Default Term' field is highlighted with a red box and contains the value '90'. Other fields include 'Name' (Prestige), '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 Prestige Lounge & Events, priority and courtesy check-out lanes and so), 'Billing Type' (Price \$ 60), and 'Recurring Service(s)'. Below these fields are sections for 'Job Template', 'Task Template', and 'Recurring'.

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.

The screenshot shows the 'Prestige' membership configuration page. The 'Recurring Service(s)' section is highlighted with a red box. It contains a dropdown menu labeled 'Select Job Template to Add' and a 'SAVE' button.

Set up the Recurring Service(s)

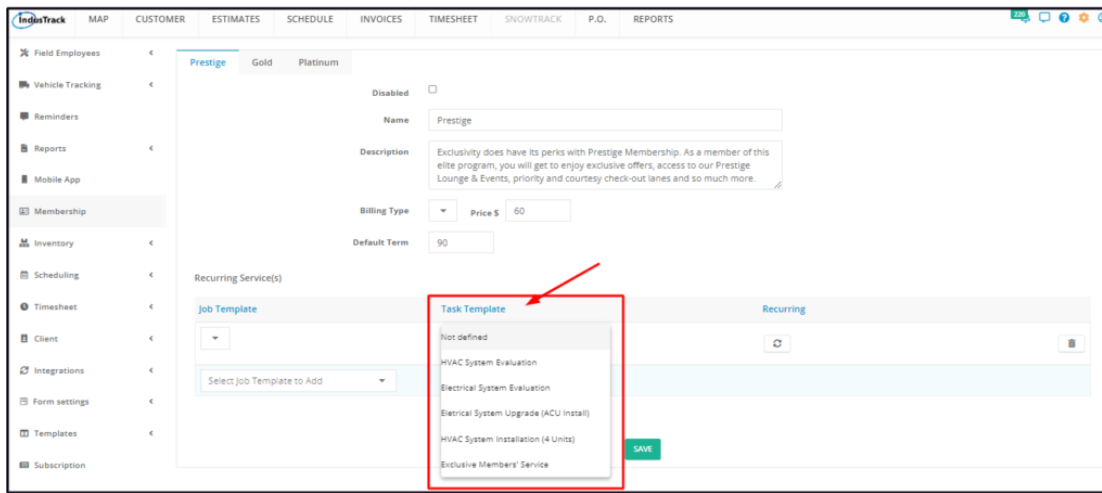
Although not a requirement, create special Job and Task templates specific for [Membership plan holders](#). You can make the program attractive and stand out from the regular services provided.

Select a **Job Template** from the drop-down list.

The screenshot shows the 'Prestige' membership configuration page. The 'Job Template' dropdown menu is open, showing a list of options: 'Electrical System Upgrade for Solar Panels Install', 'Electrical System Upgrade (ACU Install)', 'HVAC System Install', 'HVAC System Quarterly Maintenance', and 'Prestige Members HVAC Services'. A red arrow points to the 'Job Template' label.

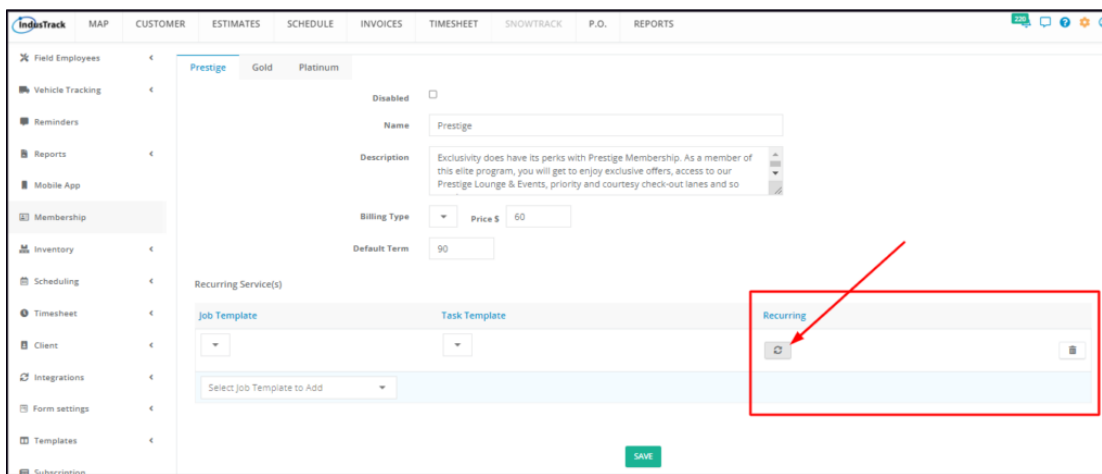
Selecting a Job Template will enable the Task Template and Recurring fields.

Select the **Task Template** associated with the Job.

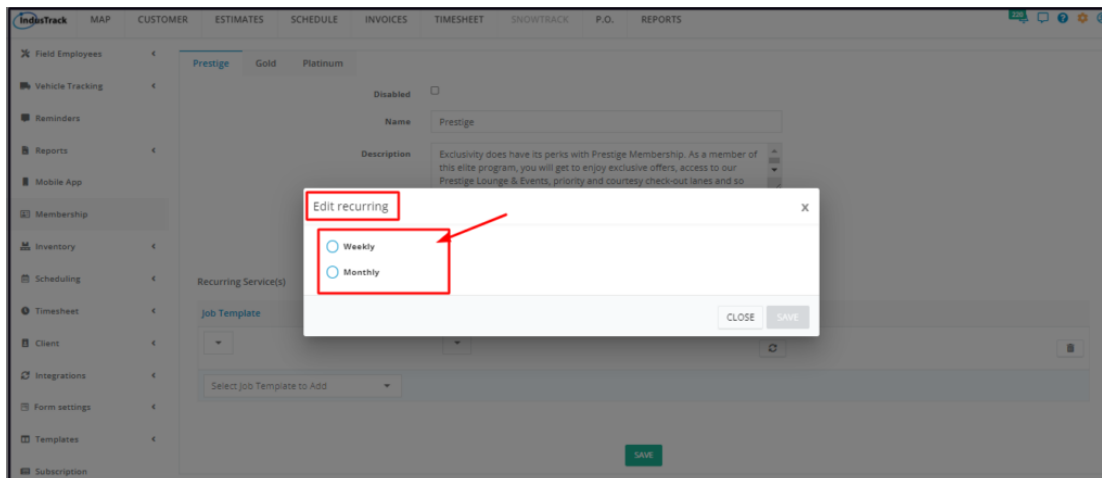


Set up the Frequency of the Services

To start the frequency set up click the repeat icon.



Select if the recurrence will be **Weekly** or **Monthly**.



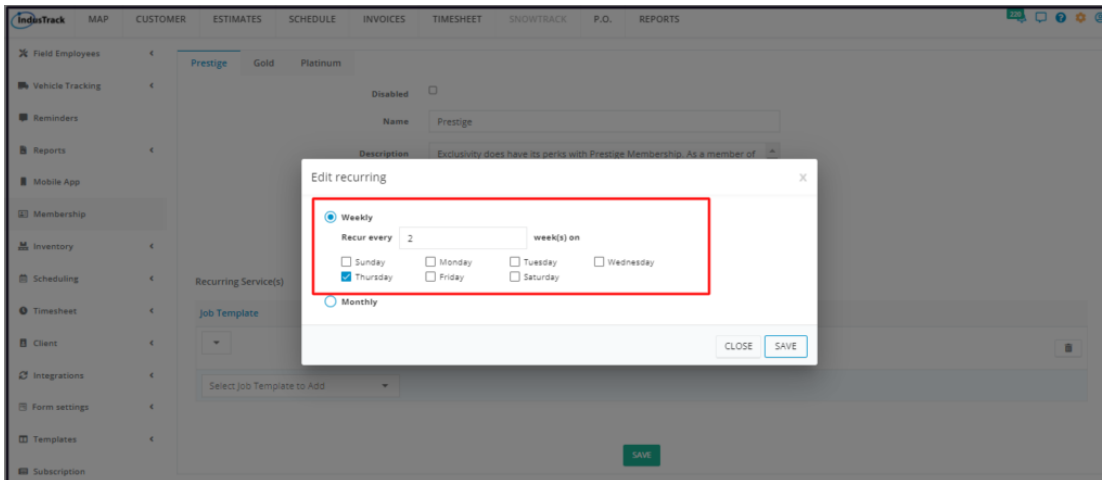
Complete the setup based on the selected recurrence. Once the Recurrence setup is complete, **Save** this.

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.

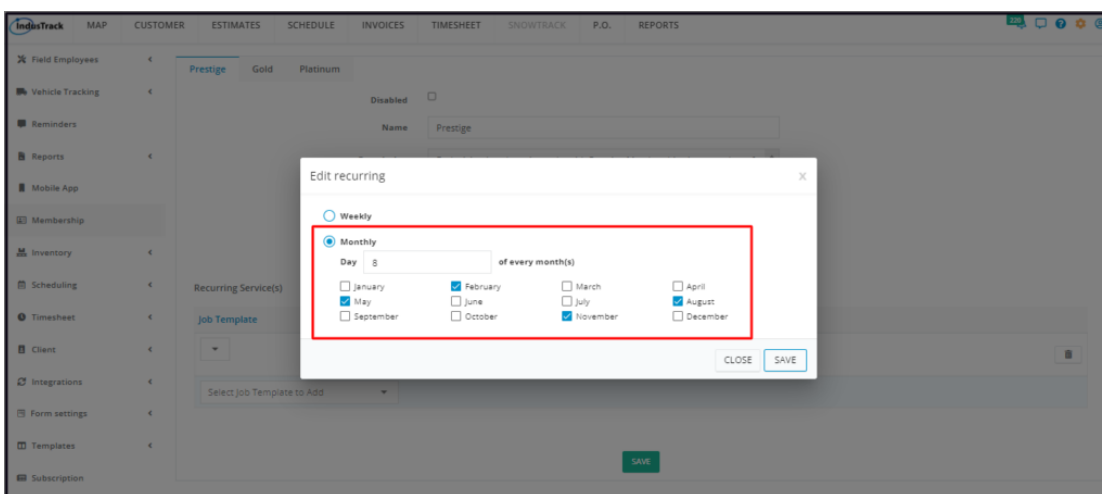


Monthly Recurrence

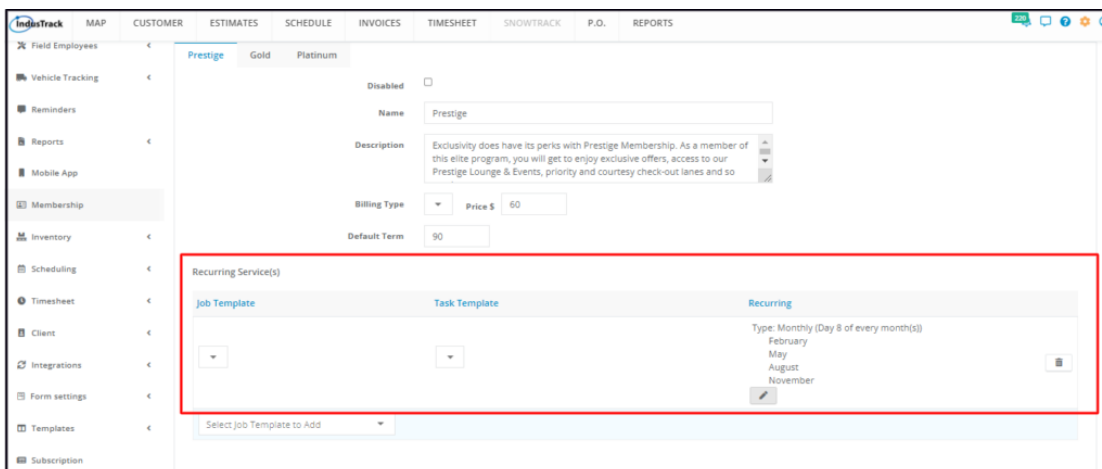
Click the radio button of **Monthly**.

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.



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



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.
