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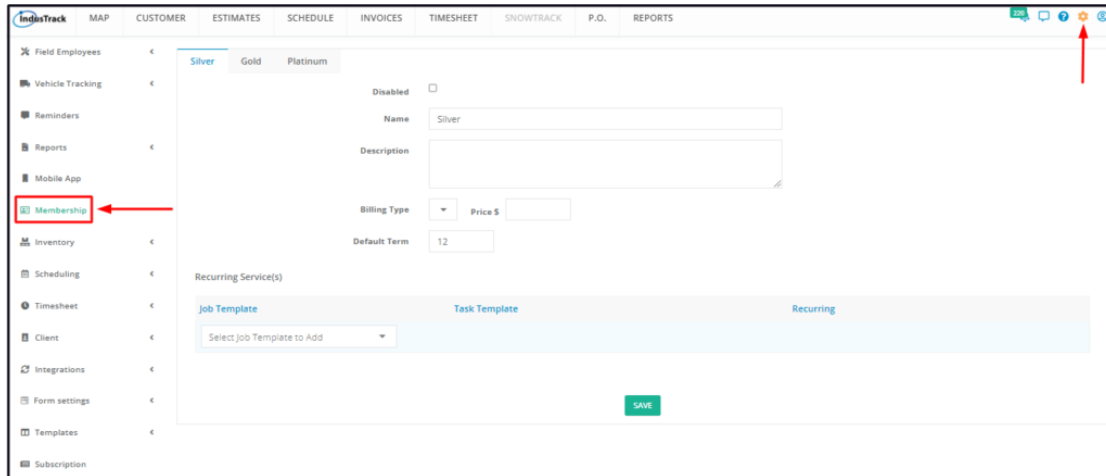
Techs can easily sell memberships using prebuilt forms and templates, from their mobile apps.

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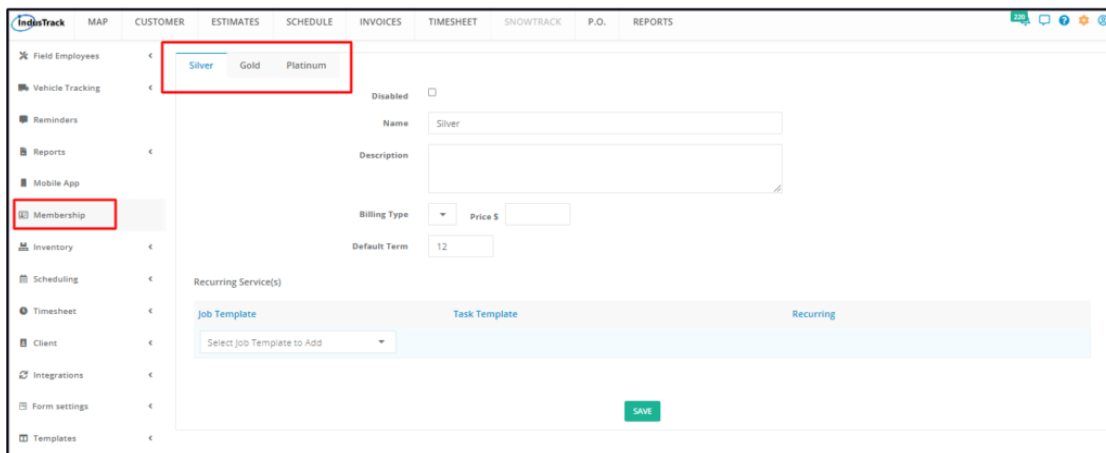
When set up and assigned, IndusTrack automatically creates all the services for the membership. You can adjust discounts in setup or on the fly.

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 **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.

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.

Description

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

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

Price

Key in the membership price in this field.

Default Term

This refers to the terms of payment.

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.
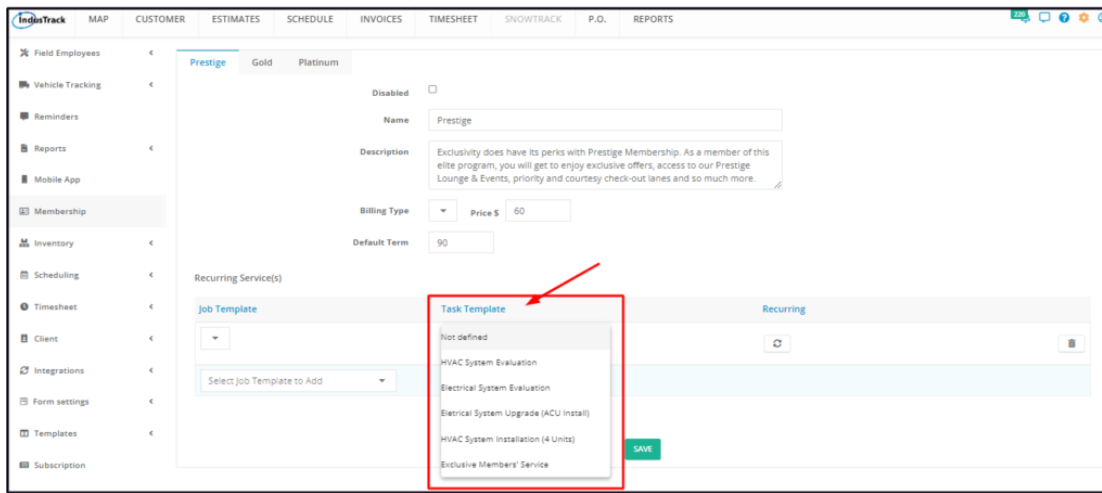

Set up the Recurring Service(s)

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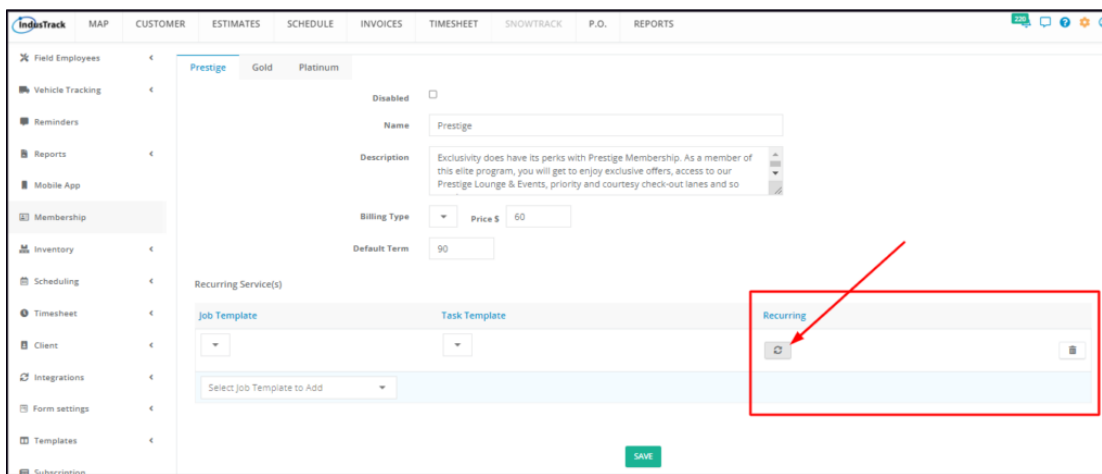
Select a **Job Template** from the drop-down list.

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

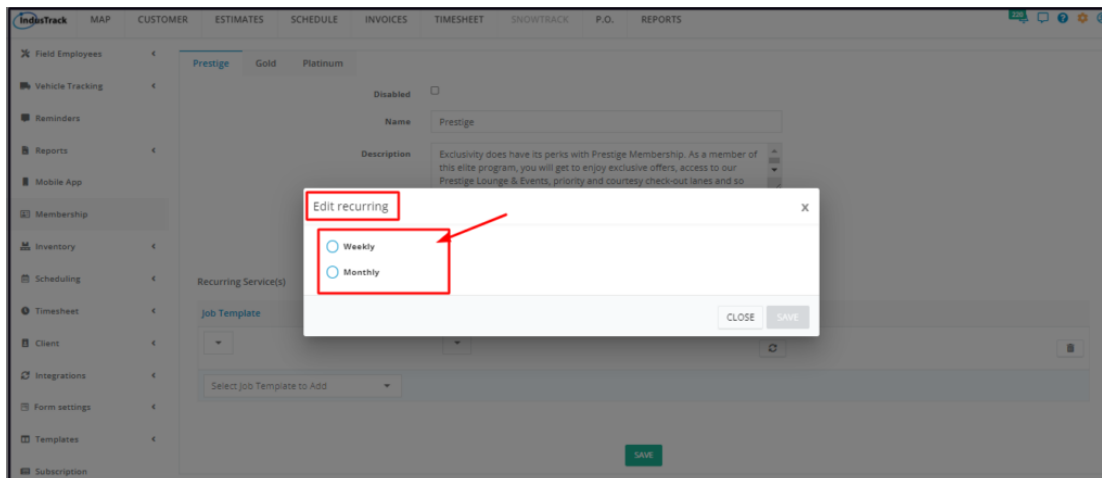Select the **Task Template** associated with the Job.

Set up the Frequency of the Services

To start the frequency set up click the repeat icon.

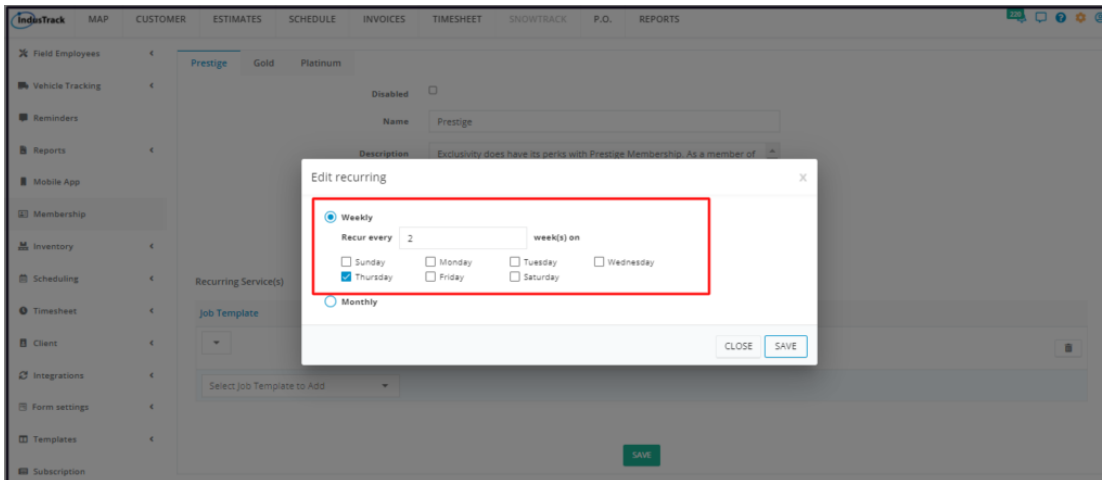Select if the recurrence will be **Weekly** or **Monthly**.

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.
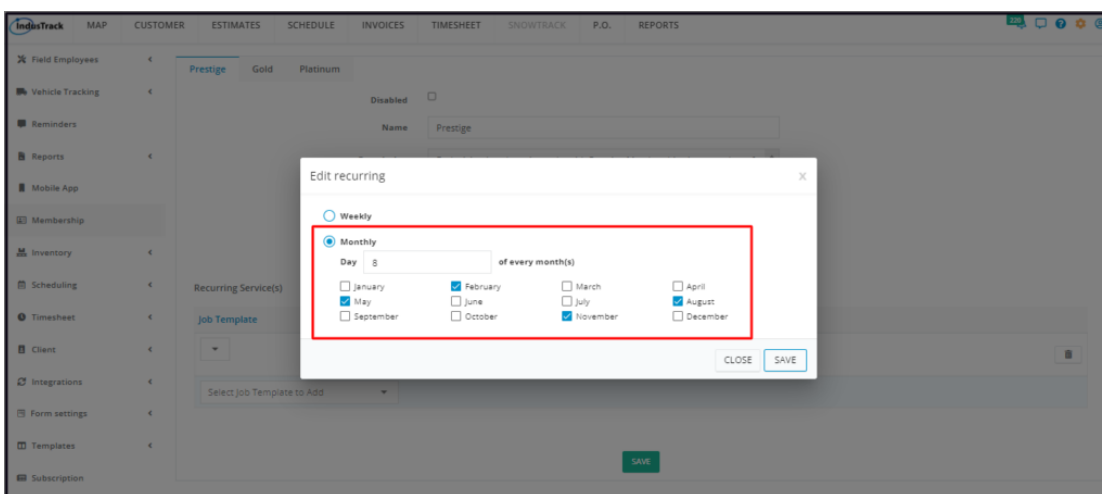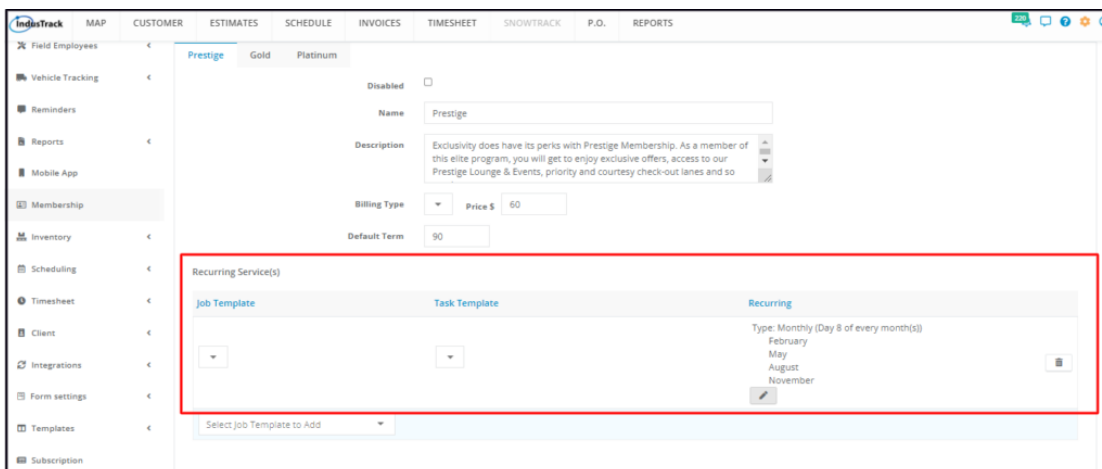

Monthly Recurrence

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.