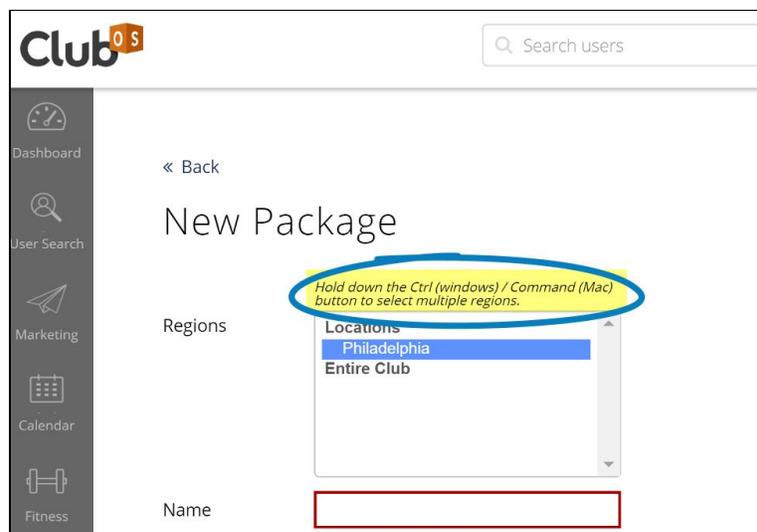


# Introduction to Package Setup

Once you have created Member Services, the next step is bundling them into Packages for your clients. Here, we'll walk you through creating one sample introductory training package based on a 60-minute Personal Training service.

## Building the Package

1. Start at the 'Packages' tab under My Club -> Package Setup.
2. Next, select the location where this package will be offered. If it will be offered at multiple locations, follow the instructions above the locations box. (You will only be able to choose from Services that are available at the same location.)



3. Just like Member Services, you want to give your package a **clear and descriptive Name** (and, optionally, a description).
4. **Term length** is the length of the agreement. The Min and Max Term fields can also be used to set a range, if you want to provide flexibility at the point of sale. This would allow you to choose any value from the range when you are putting an agreement together for a client. Otherwise, enter the same value in all the Term fields.
5. We advise choosing either weeks OR months for both the **Term** and **Billing Cycle**. This is because sessions are funded (paid for and made available to the client) according to the billing cycle. Coordinating your term and billing cycle will keep things simple. (For example, if a client is billed weekly on an agreement with a monthly term, the number of billing dates could vary month to month, causing possible confusion.)

The screenshot shows the Club OS interface for creating a package. The form fields are:

- Name: PT 60 1x/Week 8 Weeks
- Description: Introductory
- Term Length: 8 Weeks
- Min Term: 8 Weeks
- Max Term: 8 Weeks
- Billing Cycle: 1 Weeks
- Tags: (empty)

A blue arrow points to the Term Length, Min Term, and Billing Cycle fields with the text: "Choose 'weeks' OR 'months' for all options".

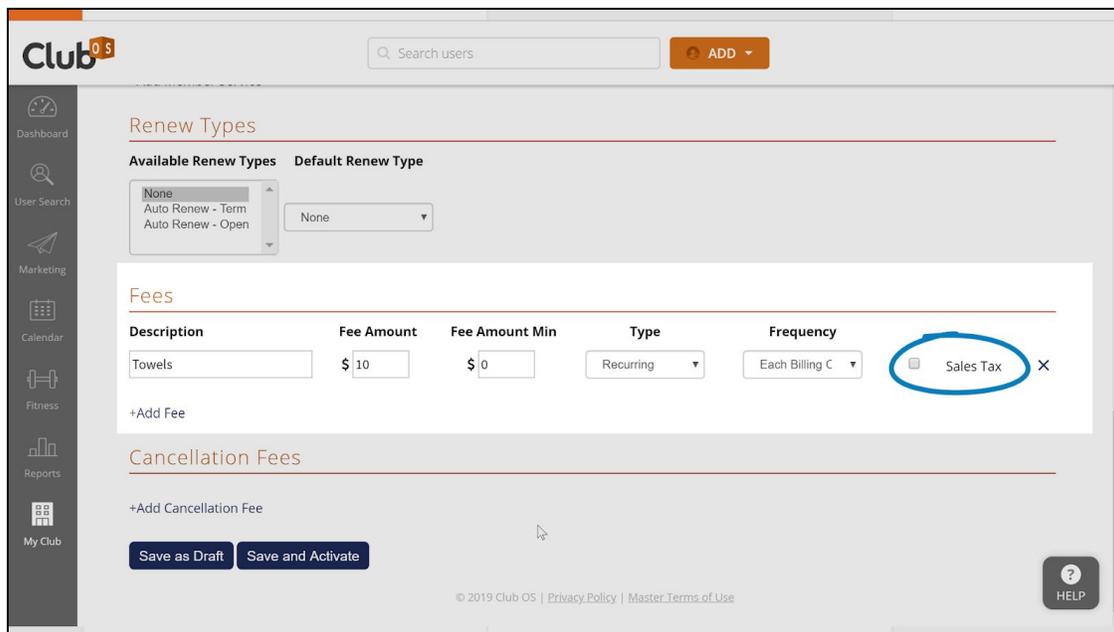
Below the form are sections for "Options", "Member Services", and "Renew Types". The "Renew Types" section has a dropdown menu set to "None".

- Tags are optional and for your reference only. If a package has a descriptive name, they may not be necessary.

## Adding Services

- Now that the basic structure of your Package has been created, proceed to the **Member Services** section to add one or more Services.
- Click "**Add Member Service**" and make a selection from the drop down menu. Unit Price, Unit Price Min, and Expiration will pre-populate with the default settings you assigned to the member service, but you can edit them here, at the Package level. **Modifications you make at this stage will not affect the original Member Service. They are specific to this Package only.**
- Use **Units/Bill Cycle** to decide how many units, or sessions, to release on each billing cycle. You can add a range in the Minimum/Maximum fields to create more flexible packages. Or, to keep it simple, enter the same value in each of these fields.
- Choose an **Expiration** to determine how long units will be available for clients to use once they're paid for. In some cases, expired sessions can be reactivated and returned to clients if necessary, depending on your club's setup and permissions.
- Next, set the **Renewal Type**. You are **required** to set at least one renewal option. If you provide multiple options, you will also need to designate one as the default renew type, but everything you select will be available to choose from at the point of sale.

- a. **None:** This package will not renew when the term ends. The client would have to purchase a new package if they wanted to continue training.
  - b. **Term:** The package will automatically renew for the same term length unless the client cancels. Since we chose a term of 8 weeks, the package would renew for another 8 weeks.
  - c. **Open:** The package will automatically renew on the billing cycle. In this example, the billing cycle is biweekly. After the initial 8 week term is up, an open renewal would continue to bill the client every two weeks until it's cancelled.
6. **Fees** enable you to charge an administrative/enrollment fee, or for perks like towels. This is optional. You can also set the Fee Amount Minimum as low as 0, to allow the fee to be reduced or waived at the point of sale.
    - a. **Recurring** fees are charged on the billing cycle.
    - b. **One time fees** will be applied to the client's first payment.
  7. If your club is set up to charge **taxes**, you can use the taxes checkbox to add them to this package. (This checkbox may or may not appear, depending on whether a tax setup was created in the Taxes section of Package Setup.)



8. **Cancellation Fees** only apply if a client needs to cancel the agreement before the end of its term. These can be reduced or waived at the time of cancellation if necessary.

## Save and Activate

Once you have completed the settings, click “Save and Activate”, and the package will now appear on your list. You can use the Save as Draft option if you do not want it to be available for use yet.