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**Administration**

**Account Set-Up 12:** Club Memberships

Click **Administration> Club Memberships** 

You will see 3 Pre-built Memberships and you can either update these or create more.



You can Edit the Membership

* **Name** - of Membership
* **Description** - What does the membership entail?
* **Duration** – Length in Months
* **Renewal** – Will this auto renew?
* **Price** – Cost of Membership (Determined by month or year in next option)
* **Billing Option** - Monthly or Annually
* **Visits** – Included yearly visits (edited after created)
* **Units** – How many units or what type does this cover (edited after created)

Click **Edit** on the Top Right 

You will now be able to edit Membership Title (Membership display name)

*Note: If you want a Yearly and Monthly version of the same Membership, you must make two Memberships, one annual and one monthly.* 

Once you have Finished Creating your Custom Memberships Click **Done**

*Next we will edit the Memberships visits and Units*

Click on the Edit Icon Next to the Membership you would like to edit



On this Page you are able to edit Visits and Units that can be attached to this membership.

Click **+ Add Visit** or **+ Add Unit** to add any units or visits you would like to this membership

**Due After (Months)** is the number of months before you owe the Client this Visit

When finished editing this Membership, Click back on **Club Memberships**, repeat until complete.

Once you’ve completed Editing all of the Memberships, you will need to make sure they are also Line items in your Service catalog, so Techs can sell the membership in the field.

*Please refer to* ***Set-Up 9: Manage Service Catalog in ThermoGRID*** *to create the line items*

*Club Memberships can be built to automatically move your Deferred Revenue to an Income account in QuickBooks Online when membership visits are completed.*

This requires Creating separate Line Items to Tag to the Visits when they are completed 

The Example Above Displays the Original Membership that was sold and then the Visit Completed under it. **This would normally not be done on the same day but this is to show what a sold membership and Visit would look like.**

You can see above that the Original Membership had a Cost of **149**

When a Membership is sold, it is not actual income and should be put into a **Deferred Revenue Account** in QuickBooks Online until the Visits are completed*. The visits Dollar amount should equal the total of the Membership after all visits are completed.*

*EX: Membership Cost: $200 Visits: 4 Completed Visits: $50 (200/4=50)*

The **Gold Club Membership** is mapped to **Deferred Revenue** for **$149**

The **Gold Visit 1** is mapped to **Deferred Revenue** for **-$74.50** (Always Negative)

**Completed** is Tagged to **Gold Visit 1** mapped to **Income** for **$74.50**