



SENIOR AFFAIRS POINT OF SALE SYSTEM MEMBERSHIPS TRAINING COURSE

Section 4

Renewing a DSA Membership

Revised December 28, 2016

DSA Memberships Course -Section 4

Renewing a DSA Membership

- **When does a member renew a membership?**
 - When a member's membership has expired
 - When a member's membership is about to expire
- **When is a membership NOT a renewal?**
 - **Age Eligibility Group Change:**
 - If a person has moved into a new eligible age class (White to Yellow, Yellow to Blue), you will **NOT** process this as a renewal. You will create a new membership and print a new membership card. This ensures the correct membership card is printed.
 - Once you have created a new membership and issued a new membership card for a person who has changed into a new age eligibility class, you will reprint a receipt and stamp it with the **Age Update** stamp.
 - Provide the stamped receipt to the manager so that the manager can merge the files and the citizen's membership expiration date remains the same.

DSA Memberships Course -Section 4 Renewing a DSA Membership

Steps 1 and 2

- **Overview:** When a member's membership is expired or about to expire and they:
 - Want to pay and renew and
 - They are NOT in a new eligibility age class, you will complete the following tasks/steps:
 1. Have the member fill out a SAMS Registration form. (Membership forms must be completed annually.)
 2. Swipe the member's card through the Point of Sales system to pull up the member's Information or click on guest lookup to find the member in the system to verify the member's information is correct.

DSA Memberships Course -Section 4

Renewing a DSA Membership

The screenshot displays the Sales32C POS system interface. At the top, the status bar shows 'Sales32C SAND02 E29297 Sale# 36059001 03/30/2016 02:16:40 PM'. The main menu area contains various items such as 'Membership ...', 'ATTENDANCE COUNT', 'Full Breakfast', 'Meal Site Lunch 60+', 'Meal Site Lunch <60', 'Meal Site Lunch', 'Meal Site Lunch ShareCare', 'COFFEE-SM', 'Milk', 'Juice', 'Meal Refund', 'Dinner Dance - Barelax', 'POPCORN', 'PIE SOCIAL', 'ICE CREAM SOCIAL', 'Flea Market', 'Sports & Fitness ...', and 'Misc Items ...'. A toolbar at the bottom includes buttons for 'Clear', 'Drawer', 'Receipt', 'Recall', 'Debitware', 'Finalize', 'Logout', 'Tools', 'Guest Lookup', 'Update', and 'Close Out'. A callout box with a red arrow points to the 'Guest Lookup' button, containing the text: 'To begin a search for a guest in the system, click the "Guest Lookup" button.'

\$0.00

Coupon Special DateTime Account Message

SIRIUSWARE salespoint solutions

Membership ... ATTENDANCE COUNT

Full Breakfast

Meal Site Lunch 60+ Meal Site Lunch <60

Meal Site Lunch Meal Site Lunch ShareCare

COFFEE-SM Milk Juice

Meal Refund

Dinner Dance - Barelax

POPCORN PIE SOCIAL ICE CREAM SOCIAL

Flea Market Sports & Fitness ... Misc Items ...

Clear Drawer Receipt Recall Debitware Finalize

Logout Tools Guest Lookup Update Close Out

Sale Total 0.00

Discount 0.00

Subtotal 0.00

Tax/Fees 0.00

Total 0.00

E29297 09:28 PM hold 2 hold 3 hold 4 hold 5

To begin a search for a guest in the system, click the "Guest Lookup" button.

To begin a search for a guest in the system, click the "Guest Lookup" button.

DSA Memberships Course -Section 4

Renewing a DSA Membership

Information Dialog: Guest Lookup

Cancel Save

Guest Info Guest Info 2 Guest Info 3 Summary

Parent Guest Primary Guest Second Linked Guests

*Name (First>Last) TEST FIRST NAME TEST LAST NAME

Second Guest

Type Mailing Link Link All

Preferred Clear Address Unlink Unlink All

Company NA

Address 12345 SUNNY DRIVE

City State

Zip 87102 Country USA

Phone (505) 123-4567 Ext. () - Phone 2 Ext. () - Fax Ext. () -

No Mail No Phone No E-Mail

Birth Date 03/15/1920 Age 96yrs

Height / ft / in cm

Weight pounds kg

E-Mail test@gmail.com

Account

Group

Gender Male Female

Enter CC-Swipe New Photo ID Card

Click the "Pass Inquiry" Button to review member information and verify

Notify

New Search Clear Create New Set Primary History Activity **Pass Inquiry**

Reset Web Password

Advanced Search

Card/Pass Search Get from Self-Entry

This is a lookup of guest#45059001, TEST FIRST NAME TEST LAST NAME

Look for Boomer Exception

- There are certain situations where a renewal will not print a card. **IF** you see the term “**Boomer**” in the “**Item**” column:

Pass Inquiry
for Guest#65362000001, THOMAS MORGAN

Pass No.	Additional ...	Start	Expires /	Status	Item	Card#	DW	Balance
255080001	12486	03/04/201...	03/03/201...	Active	Annual PM Pass	12486	FALSE	0.00
623500001	10318464...	01/01/2011...	11/12/2011...	Expir...	Member New		FALSE	0.00

UP

Member New = Senior Affairs

Annual PM Pass = Parks and Recreation Pass (Not used by Senior Affairs)

OK Cancel DOWN

- THEN**, you will need to create an entirely new membership in the point of sale system for this member. Steps are on the next page. (you may also refer to section 3 of this course.)
- Once you have done completed the transaction, you will add the member information to the log that is kept at the front desk of your DSA facility. Your manager will need to merge these accounts to avoid duplicates within the system.

DSA Memberships Course -Section 4

Renewing a DSA Membership

- Do a guest lookup on the point of sale system
- Record the member's addit_no and verify the number with the member if possible
- Exit guest lookup
- Sell a new membership/pass in the appropriate age group
- Enter the name of the member to pull up all data
- Verify or enter the addit_no in the validation tab

Information Dialog: 18-49 Member New

ITEMS CREATED: 1 OF 1

Guest Info Guest Info 2 Guest Info 3 Summary Pass Swipe Access Information

Access Information Tab

Addit-No 1

- When the sale is completed, the card will print automatically
- Test card and deliver card to member

DSA Memberships Course -Section 4

Renewing a DSA Membership

Step 3

From the Main page in the Point of Sales System, Click on the “Membership” button. This will take you to the Membership options page.

The screenshot shows the Point of Sales System interface. The top bar displays the current sale information: Sales32C, SAND02, E29297, Sale#=38059001, and 04/15/2016 09:53:51 AM. The total amount is \$0.00. The interface includes various buttons for menu items and services, such as Full Breakfast, Meal Site Lunch (60+, <60, ShareCare), COFFEE-SM, Milk, Juice, Meal Refund, Dinner Dance - Barelax, Dance - Barelax, POPCORN, PIE SOCIAL, and ICE CREAM SOCIAL. A red box highlights the "Membership ..." button, and a red arrow points to it from a text box that reads: "To begin a renewal membership, click the 'Membership' button". The bottom right corner shows a summary table with the following data:

Sale Total	0.00
Discount	0.00
Subtotal	0.00
Tax/Fees	0.00
Total	0.00

At the bottom of the screen, there are buttons for "Clear", "Drawer", "Reprint", "Recall", "Debitware", "Finalize", "Logout", "Tools", "Guest Lookup", "Update", and "Close Out". The bottom status bar shows the time 09:28 PM and several hold buttons (hold 2, hold 3, hold 4, hold 5).

DSA Memberships Course -Section 4

Renewing a DSA Membership

Click the appropriate age eligibility class renewal button. (e.g. 60+ Member Renew, 50-59 Member Renew or 18-49 Member Renew)

The screenshot displays the Sales32C software interface. At the top, the status bar shows 'Sales32C DRELO1 E24295 Sale#=68044001 04/15/2016 01:41:57 PM'. Below this, there are buttons for '-Top-' and '. Memberships'. A central display shows '\$0.00' and several menu options: 'Coupon', 'Special', 'DateTime', 'Account', and 'Message'. On the left side, there are buttons for '60+ Member New', '50-59 Member New', '18-49 Member New', 'Member Child < 18', '60 Plus Renewal', '50-59 Renewal', and '18-49 Renewal'. A red arrow points from a text box to the '18-49 Renewal' button. The text box contains the instruction: 'Choose the correct renewal age eligibility group: 60+ Renewal, 50-59 Renewal, 18-49 Renewal.' At the bottom, there is a toolbar with icons for 'Clear', 'Drawer', 'Reprint', 'Print CC Receipt', 'Debitware', 'Finalize', 'Logout', 'Tools', 'Guest Lookup', 'Update', and 'Close Out'. On the right side, a summary table shows the following values:

Sale Total	0.00
Discount	0.00
Subtotal	0.00
Tax/Fees	0.00
Total	0.00

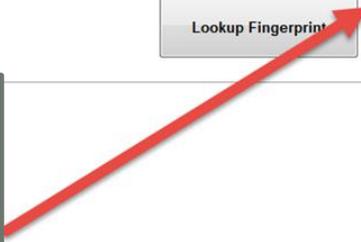
At the bottom of the interface, there are five hold buttons labeled 'hold 1', 'hold 2', 'hold 3', 'hold 4', and 'hold 5'. In the bottom right corner, there are two green circular buttons labeled 'S' and 'C'.

DSA Memberships Course -Section 4

Renewing a DSA Membership

Pass Number	<input type="text"/>	Check	Guest Lookup
Status	Invalid	Lookup Fingerprint	

Click the **Guest Lookup** button on the renewal screen or swipe the member's card to review the member's information and renew their membership.

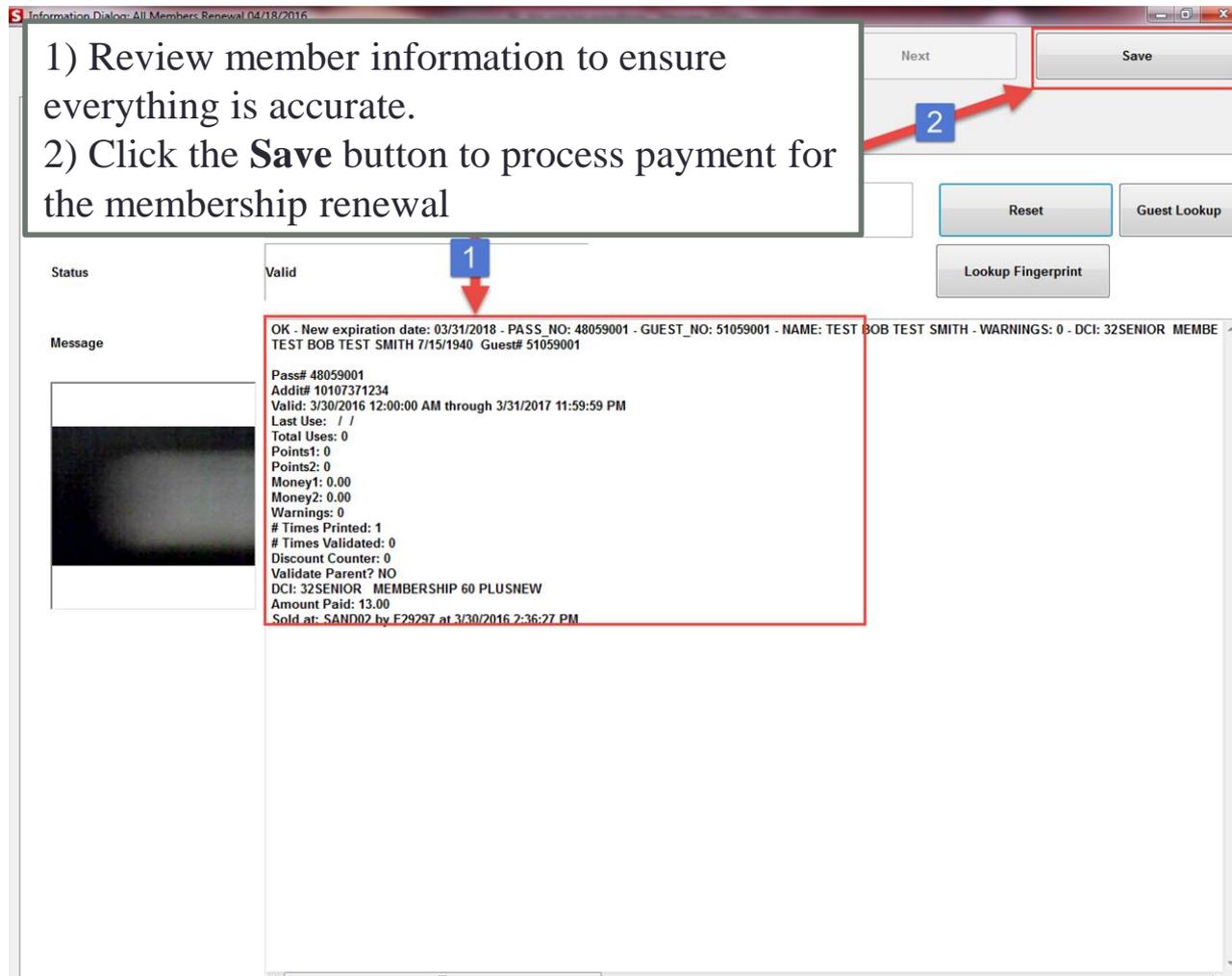


DSA Memberships Course -Section 4

Renewing a DSA Membership

1) Review member information to ensure everything is accurate.

2) Click the **Save** button to process payment for the membership renewal



Status Valid

Message

OK - New expiration date: 03/31/2018 - PASS_NO: 48059001 - GUEST_NO: 51059001 - NAME: TEST BOB TEST SMITH - WARNINGS: 0 - DCI: 32SENIOR MEMBE
TEST BOB TEST SMITH 7/15/1940 Guest# 51059001

Pass# 48059001
Addit# 10107371234
Valid: 3/30/2016 12:00:00 AM through 3/31/2017 11:59:59 PM
Last Use: / /
Total Uses: 0
Points1: 0
Points2: 0
Money1: 0.00
Money2: 0.00
Warnings: 0
Times Printed: 1
Times Validated: 0
Discount Counter: 0
Validate Parent? NO
DCI: 32SENIOR MEMBERSHIP 60 PLUSNEW
Amount Paid: 13.00
Sold at: SAND02 by F29297 at 3/30/2016 2:36:27 PM

Next Save

2

Reset Guest Lookup

Lookup Fingerprint

DSA Memberships Course -Section 4

Renewing a DSA Membership

1) Accepting a Debit or Credit Card Payment

The screenshot displays the DSA software interface for a membership renewal. At the top, the total amount is \$13.00. Below this, there are buttons for 'Coupon', 'Special', 'DateTime', 'Account', and 'Message'. The main area shows a list of items, with the first item being 'All Members Renewal 04/18/2016' for \$13.00. A text box in the center of the screen contains the following instruction: 'Swipe credit/debit card while on this screen or if the member is using a cash or check, click the **Finalize** button.' A red arrow points from this text box to the 'Finalize' button in the bottom toolbar. The bottom toolbar includes buttons for 'Clear', 'Drawer', 'Print Sale', 'Save', 'Debitware', 'Finalize', 'Logout', 'Tools', 'Guest Lookup', 'Update', and 'Close Out'. On the right side, there is a summary table with the following data:

Sale Total	13.00
Discount	0.00
Subtotal	13.00
Tax/Fees	0.00
Total	13.00

At the bottom of the screen, there are three hold buttons labeled 'hold 3', 'hold 4', and 'hold 5'. There are also two green buttons labeled 'S' and 'C' in the bottom right corner.

DSA Memberships Course -Section 4

Renewing a DSA Membership

1) Enter the amount of payment in the appropriate payment type field (Cash Check, Purchase Order or American Express for the membership transaction.

2) Click the “OK” button

DSA Memberships Course -Section 4

Renewing a DSA Membership

- **Test Printed Card:** Test the printed card in both the Siriusware and SAMS system card swipe readers to ensure the card works and pulls up the member's information.
- **Reprint Card:** If the card did not print correctly, reprint and test.
- **Expiration Date Label:** Adhere the new Expiration Date Label to the back of the member's card and write the new expiration date on the label.
 - Note: Ensure that the label does not cover or is not near the magnetic stripe as this could potentially cause issues with the scanner.

DSA Memberships Course -Section 4

Renewing a DSA Membership

- Congratulations! You have completed Section 4- Renewing a DSA Membership for the DSA Memberships Course

