



SENIOR AFFAIRS POINT OF SALE SYSTEM MEMBERSHIPS TRAINING COURSE

Section 5

Print/Reprint -Lost/Stolen/Request for New
Card/Forgotten Card

Revised December 28, 2016

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Print/Reprint - Lost/Stolen/Request for New Card/Forgotten Card

- **When DO you charge \$1.00 for membership card reprint?**
 - When a member loses card and needs a replacement
 - When a member does not like their picture and wants a new card
- **When do you NOT charge \$1.00 for membership card reprint?**
 - **Member has an old card and wants new card No Charge**
 - Example: If Bob has an old card, but wants the new membership card, you can print his new membership card in the Siriusware system at no charge. Take a picture (if he does not have one) and print his new card at no charge.
 - **When the card prints wrong membership banner color on card**
- **What do you do if a member has forgotten their card?**
 - For that day, use the Guest Lookup and SAMS member printout to process transactions)

Reminder:

On ALL reprints -Remember to place the expiration label on the back of the membership card

Step 1

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- **To begin a Membership Card Reprint:** On the sales screen, click the **Guest Lookup** button to begin to pull up the member's information.

The screenshot shows the Sales32C software interface. The top bar displays the sale number (38059001) and date (04/14/2016 11:57:07 AM). The main area contains various menu items like Membership, ATTENDANCE COUNT, Full Breakfast, Meal Site Lunch, COFFEE-SM, Milk, Juice, Dinner Dance - Barelax, POPCORN, PIE SOCIAL, and ICE CREAM SOCIAL. A text box with a red arrow points to the 'Guest Lookup' button in the bottom right area. 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

Step 2

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- **Enter guest Name > Click the Search button > Check for any duplicates** in the Right bottom information box. Ensure there are not duplicates (bottom right of screen). **If there are duplicates – ???**

A) Enter the applicant's First Name/Last Name

B) Click the "Search" button

C) View possible duplicates in the "Possible Duplicates field"

The screenshot shows a web form for entering guest information. At the top, there are fields for 'FIRST' and 'LAST' name, with a red box around them and a red arrow labeled 'A' pointing to them. Below these are fields for 'Primary' and 'Second' names, and 'Salute' dropdowns. There are 'Link' and 'Link All' buttons, and 'Unlink' and 'Unlink All' buttons. Below that are fields for 'Birth Date', 'Age', 'Height' (ft/in), and 'Weight' (pounds/kg). There are also 'E-Mail', 'Account', 'Group', 'Gender' (Male/Female), 'Enter CC-Swipe', 'New Photo', 'ID Card', and 'Notes' fields. At the bottom, there are 'Search', 'Clear', 'Create New', 'Set Primary', 'History', 'Activity', and 'Pass Inquiry' buttons. A red box at the bottom right contains the text 'Possible Duplicates: LAST | FIRST | 26000001 | | (999) 999-9999 |'. A red arrow labeled 'B' points to the 'Search' button, and a red arrow labeled 'C' points to the 'Possible Duplicates' field.

Possible Duplicates:
LAST | FIRST | 26000001 | | (999) 999-9999 |

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- **Verify Member Picture:** Check to verify that the person in front of you is the person in the picture. Take the member's picture if there is not one in the Point of Sales System. ***DSA encourages the member's picture be on their membership card. If the member refuses to take a picture, take a picture of the center's logo and place on the card.**

Step 3

Cancel Save

Guest Info Guest Info 2 Guest Info 3 Summary

Parent Guest Primary Guest Second Linked Guests

*Name (FirstLast) TEST FIRST NAME TEST LAST NAME Salute

Second Guest Salute

Mailing Type Link Link All

Birth Date 03/15/1920 Age 96yrs

Height / ft / in cm

Weight pounds kg

E-Mail test@gmail.com

Account

Gender Male Female

New Photo ID Card

Member Picture Shows Here

Notes

Notify

New Search Clear Create New Set Primary History Activity Pass Inquiry

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

Advanced Search

Card/Pass Search Get from Self-Entry

Check to see if there is a picture of the member. If there is a current picture, make sure it is the member and continue with the steps to issue the new card.

If there is not a picture, take a picture of the member by clicking the “New Photo” button

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In the “Take a New Photo Window” Click the “Freeze” button to take the member’s picture

Step 4

The screenshot displays a software interface for managing guest information. A modal window titled "Take a New Photo" is open, showing a photograph of a woman. A red arrow points from a text box in the window ("Click 'Freeze' to Take a New Picture") to the "FREEZE" button. The background interface includes a navigation bar with tabs like "Guest Info", "Guest Info 2", "Guest Info 3", "Summary", "Pass Swipe", and "Access Information". Below this, there are form fields for "Parent:", "Second Guest", "Mailing", "Type", "Preferred", "Clear Address", "Company", "Address", "City", "Zip", "Phone", "Ext.", "Phone 2", "No Mail", "No Phone", "No E-Mail", and "Notify". At the bottom, there are buttons for "Search", "Clear", "Create New", "Set Primary", "History", "Activity", "Pass Inquiry", "Quick Select Guest", "Advanced Search", "Card/Pass Search", and "Get from Self-Entry".

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Step 5

Click on the Image Area to Resize and Crop the photo. When you are done, click the “Crop and Save” button to save the member’s picture.

Take a New Photo

Reposition/resize the crop if necessary and click Save

Click on the Image Area to Resize/Crop and then click the "Crop and Save" button to save the member's picture

Unfreeze

Crop Fixed
 Crop Free

Crop and Save

Cancel

Video Format

Video Source

Show Setup

Clear Address

Phone 2

() -

No Phone No E-Mail

Notify

Clear Create New Set Primary History Activity

Reset Web Password

Get from Self-Entry

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- Click the **“Pass Inquiry”** button at the bottom right of the sales screen to verify that the member’s membership information is correct.

Information Dialog: Guest Lookup

Cancel Save

Guest Info Guest Info 2 Guest Info 3 Summary

Parent Guest Primary Guest Second Linked Guests

*Name (FirstLast) TEST FIRST NAME TEST LAST NAME Salute Salute

Second Guest

Type Mailing Link Link All

Preferred Clear Address Unlink Unlink All

Company NA

Address 12345 SUNNY DRIVE

City State

Birth Date 03/15/1920 Age 96yrs

Height ft / in cm

Weight pounds kg

E-Mail test@gmail.com

Account

Group

Gender Male Female

New Photo

ID Card

Phone (505) 123-456

No Ma

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

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

Advanced Search

Card/Pass Search Get from Self-Entry

Click the **“Pass Inquiry”** button to review and verify member information

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- In the Pass Inquiry Screen, review the membership information to verify that the member is in the correct Age Eligibility Class. When you have verified the member's information Click the "OK" button.

for Guest#45059001, TEST FIRST NAME TEST LAST NAME

46059001 | 03/25/2016 00:00 | 03/31/2017 23:59 | Active | 60+ Member New | FALSE | 0.00

UP

Pass No.	Start	Expires	Status	Item	Card#	DW	Balance
46059001	03/25/2016 00:00	03/31/2017 23:59	Active	60+ Member New		FALSE	0.00

A

1) Verify that the member is in the correct Age Eligibility Class under the "Item" column

2) If the information is accurate, click the "OK" button to print the member's card.

Note: If the information is inaccurate, click cancel to get out of the verification screen to resolve the issue. Resolution depends on the specific scenario.

B

OK Cancel DOWN

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- Check the # of times the member's card has been printed on this screen to see if there will be a fee associated with this reprint transaction.
- If everything looks correct, click the **“Print Pass”** at bottom right of screen.

Pass Information for 46059001

TEST FIRST NAME TEST LAST NAME 3/15/1920 Guest# 45059001

Pass# 46059001
 Addit# 10107071234
 Valid: 3/25/2016 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: 0
 # Times Validated: 0
 Discount Counter: 0
 Validate Parent? NO
 DCI: 32SENIOR MEMBERSHIP 60 PLUSNEW
 Amount Paid: 13.00
 Sold at: SAND02 by E29297 at 3/25/2016 2:06:35 PM

1) The Pass Information Screen populates. You may review member information again.

2) Click the **“Print Pass”** button and the membership card should print.

3) Verify that the card prints with the correct age eligibility class color (White 18-49, Yellow 50-59, Blue 60+) and swipe the card through both Siriusware and SAMS to ensure that the card works. (You should do this any time you print a new membership card.)

Note: If the card scan does not work in either system, print a new card and repeat steps.

If the card color prints incorrectly, please contact your center manager.

Buttons: Refund, Guest Info, Sale History, Modify, ScanInfo, Exchange, **Print Pass**

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- Verify that all of the following accurately printed out on the Membership card:
 - 1) The correct eligibility class color (White 18-49, Yellow 50-59 or Blue 60+), guest number (generated by the system)
 - 2) Bar code (created from Addit_No entered by DSA staff)
 - 3) Member's picture (taken by you or another DSA staff)
- **Processing Error:** If the membership card prints with the wrong color, please contact your center manager.

Step 11

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- After you have printed the new card, you will charge a reprint fee as you would process any other transaction.
- To apply the \$1.00 reprint fee, Swipe the member's card and click **Misc. Items>Card Reprint Fee>Finalize**

The screenshot shows the Sales32C POS system interface. At the top, the status bar displays 'Sales32C DRELO1 E24295 Sale#=70044001 07/28/2016 11:25:53 AM'. The main interface is divided into several sections:

- Top Bar:** Contains buttons for '-Top-', '. Misc Items', and a large '\$1.00' display. To the right are buttons for 'Coupon', 'Special', 'DateTime', 'Account', 'Message', and a 'SIRIUSWARE' logo.
- Item Selection Area:** On the left, there are buttons for '-Top-', 'Card Reprint Fee' (highlighted with a red box and a red arrow), 'Coffee', 'Travel on Van', 'Copies', and 'Misc Items for Sale'.
- Transaction List:** The central area shows a single transaction: '1 Card Reprint Fee 07/28/2016' with a price of '1.00'. Below this are navigation buttons: '<<', '>>', 'Modify', 'Special', 'DateTime', 'Account', 'Message', and 'Add Guest?'. The price '1.00' is also shown on the right side of the list.
- Bottom Bar:** Contains a row of functional buttons: 'Clear', 'Drawer', 'Print Sale', 'Print CC Receipt', 'Debitware', 'Finalize', 'Logout', 'Tools', 'Guest Lookup', 'Update', and 'Close Out'.
- Summary Panel:** On the bottom right, a table shows the transaction totals:

Sale Total	1.00
Discount	0.00
Subtotal	1.00
Tax/Fees	0.00
Total	1.00
- Hold Area:** At the very bottom, there are five 'hold' buttons labeled 'hold 1' through 'hold 5'.

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- **Forgotten Membership Card:**
 - If a member forgets their membership card:
 - Use “**Guest Lookup**” to verify the guest’s information (Name, birthdate, address, picture) to process transactions.
 - Do **NOT** use the aggregate card.
 - To scan into the SAMS system, use the paper roster provided by DSA. Each center should have a printout at the front desk.

Sales32C SAND02 E29297 Sale#=36059001 03/30/2016 02:16:40 PM

-Top- -Back-

\$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 Reprint 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

S C

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

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- Congratulations! You have completed Section 5- Print/Reprint-Lost/Stolen/Request for New Card/Forgotten Card for the DSA Memberships Course

