



Guide for CurvesSmart Memberships

Using iGo Figure Version 2

This guide describes everything you need to know to implement CurvesSmart memberships in your iGo Figure® Version 2 software. Special Note: We recommend that you upgrade to iGo Figure Version 3. Implementing the CurvesSmart program in Version 3- as with *everything* in Version 3 - is much *quicker, simpler and more-straight-forward* than in Version 2! To request your free upgrade CD, visit <http://www.igofigure.com/cdrequest>. Upgrading has never been easier.

Overview

Curves is introducing the CurvesSmart system in Curves clubs, and wants to consistently track the data from club to club in iGo Figure. The current CurvesSmart business model is to charge the member a CurvesSmart program and training fee, and increase the member's monthly fee (in some instances). No royalty fee is to be paid on the program and training fee. The best way to track this in iGo Figure Version 2 is to:

1. Set up a "CurvesSmart" custom member type, and assign it to each member who signs up for CurvesSmart, and
2. Set up the CurvesSmart Program and Training Fee as a product sale, and
3. Adjust the member's monthly dues as appropriate.

Details are below:

First, you must set up your system. This is accomplished in two easy steps.

Step 1 - Create a "CurvesSmart" Custom Member Type

1. From the **More Options** menu, click on **My Club Defaults**.
2. Click on the **Custom** tab.
3. At the bottom of the screen, select the **Primary Member Type** as CD (Check Draft).
4. Under **New Member Type**, type in CurvesSmart and then click the button **Add New Member Type to List**.
5. Click **OK**.

Step 2 - Create a "CurvesSmart" Inventory Item

Note: Creating an inventory item is necessary so you don't get charged royalty fees on the CurvesSmart program and training fees you collect.

1. From the **More Options** menu, click on **Inventory Options**.
2. Click **Add or View Inventory Items**.
3. Set up the inventory item as follows:
 - Click **New Record**.
 - The Item Name and Detail Description should both be entered as "CurvesSmart Program and Training Fee."
 - The "Tax Category" should be set to correspond to whatever tax rate applies to CurvesSmart Program and Training fees in your area.
 - The price should be set to \$50, or whatever the *most common* fee is that you will charge (don't worry, you can always change this at the point of sale).
4. Click "**Add Item**" and return to the Main Menu.

Your iGo Figure software is now set up to handle CurvesSmart memberships. Here is all you need to do now:

When an existing member signs up for CurvesSmart:

When an existing member signs up for CurvesSmart, follow these steps:

1. Go to the **Member File** tab of the member's record, click the blue **Edit** button, and change the membership type to **CD : CurvesSmart**.
2. Click on the **Draft** tab.
3. Increase the member's dues by the amount of the monthly CurvesSmart membership fee. (For example: the member is currently paying \$29 per month, and signs up for a CurvesSmart memberships at \$5 month. Change the \$29 monthly dues to \$34 per month instead.)

4. Click **Save Changes**.
5. Return to the Main Menu.
6. Click on the **Product Sale** button.
7. Select the member under **Purchaser**, and select **CurvesSmart Program and Training Fee** as the item purchased.
8. If you need to change the Program and Training Fee amount, click on the price, and enter the updated amount.
9. Complete the product sale as you normally would.

When a Brand-New Member Signs Up for CurvesSmart

If a brand-new member at your facility signs up for CurvesSmart at the time of joining, follow these simple steps:

1. Select the membership **Type** as **CD : CurvesSmart**.
2. Do **NOT** increase the amount due at sign-up (this will be handled in just a moment as a product sale).
3. On the **Draft** tab, increase the monthly dues by the amount of the CurvesSmart monthly membership fee.
4. After saving the membership, click on the **Product Sale** button on the Main Menu.
5. Select the member under **Purchaser**, and select **CurvesSmart Program and Training Fee** as the item purchased.
6. If you need to change the Program and Training Fee amount, click on the price, and enter the updated amount.
7. Complete the product sale as you normally would.

Pulling a CurvesSmart Report

You can pull a list of all members at your facility on the CurvesSmart program by following these steps:

1. In the **Reports** menu, click **Custom Report Generator**.
2. Click **I Want to Create a Report**.
3. Type CurvesSmart Report as both the report name and description.

4. Select 0 for Member Reports.
5. Check off **FirstName**, **LastName**, **DetailedMember Type**, and any other fields you wish to view as part of this report.
6. Click **Exit**.
7. Choose the order in which you would like the fields sorted, and click **OK**.
8. Check off all the fields to display, then click **Exit**.
9. Choose the order in which you would like the fields to display, then click **OK**.
10. Click **Close**.
11. Choose **Member Reports** as the report category, click on the **CurvesSmart** report (it will be at the bottom of the list), and click **Edit Custom Report**.
12. Click the **Set a Filter** button to the right of **DetailedMember Type**.
13. Select **Equal To** as the **Operator** (using the drop-down control), and **CD : CurvesSmart** as the **Value** (again, using the drop-down control).
14. Click **Add**.
15. Click **Close**.
16. Click **Close** again.

Now, whenever you pull the **CurvesSmart** report from **Member Reports**, you will see all of your CurvesSmart members.



Effects on Paperwork

The sign-up process described above will have the following effects on your paperwork:

- Your total active membership count will *not* be affected, regardless of how many CurvesSmart memberships you sign up.
- Your CurvesSmart sign-up fees will appear under the Retail Sales column of your Projection Sheet, not New Member Sales. Therefore, you will not be charged royalty fees on these amounts.
- CurvesSmart recurring dues will properly show up as part of your Dues & Drafts column on your Projection Sheet.

That's all there is to setting up - and handling - CurvesSmart memberships in iGo Figure Version 2!