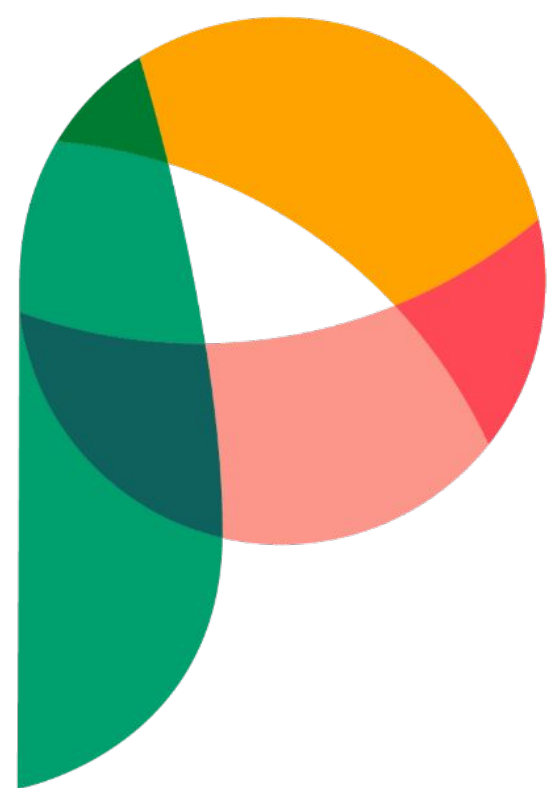




Phorest

Memberships

[Contents](#)

Watch the recording



Contents:

1. Benefits of memberships

2. Types of memberships

3. Creating a membership

4. Selling a membership

5. How does a client redeem membership credits?

6. View a client's membership information

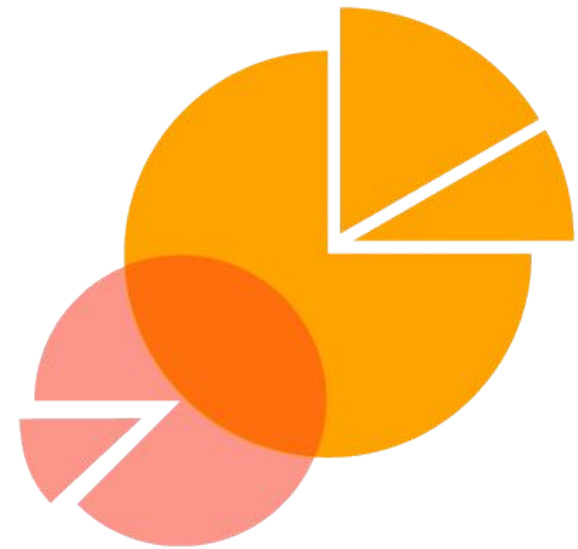
7. Membership Billing

8. Membership Reporting

9. Marketing your membership

Benefits of using Memberships:

Make every client a regular, build predictable revenue and deeper client relationships with a membership program that fits your business.

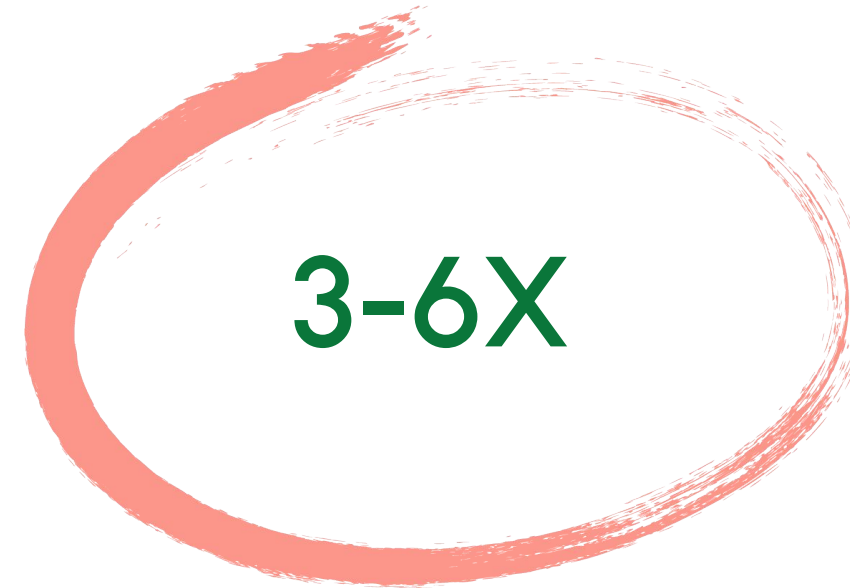


+30-60%

Membership clients visit more often. They also achieve better results due to the frequency of visits



Create exclusivity and long-term relationships. Clients feel like they belong and trust a team of experts



Loyal clients that are part of a Membership spend more annually

Membership Insights:

Australia

12.73 % of clients use memberships
75% are monthly payments
25% are weekly payments
Average monthly payment \$160 AUD
6 Month retention 89%

Rest of the world

5.18 % of clients use memberships
98% are monthly payments
2% are weekly payments
Average monthly payment \$140 AUD
6 month retention 84%

USA

11.61 % of clients use memberships
98% are monthly payments
2% are weekly payments
Average monthly payment \$181 AUD
6 month retention 82%

Types of Memberships

Credit

Members receive a set amount of credit each billing cycle to use on selected services and products

Service

Members get selected services on a recurring basis.
Eg one facial per billing cycle or two blow dries

Discount

Give members exclusive discounts. No credit or recurring services - just access to great prices.

 Credit Members receive a set amount of credit each billing cycle to use on selected services and products. ✓ Credit ✓ Discounts ✓ Custom perks ✗ Recurring services + Credit Membership	 Service Members get selected services on a recurring basis — e.g. one facial per billing cycle or two blow dries. ✓ Recurring services ✓ Discounts ✓ Custom perks ✗ Credit + Service Membership	 Discount Give members exclusive discounts. No credit or recurring services — just access to great prices. ✓ Discounts ✓ Custom perks ✗ Credit ✗ Recurring services + Discount Membership
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[Click here for our Memberships help sheet](#)

Create a membership

Creating a Membership

Click Add Membership, and choose the type: Credit; Service or Discount



Credit

Members receive a set amount of credit each billing cycle to use on selected services and products.

- ✓ Credit
- ✓ Discounts
- ✓ Custom perks
- ✗ Recurring services

+ Credit Membership



Service

Members get selected services on a recurring basis — e.g. one facial per billing cycle or two blow dries.

- ✓ Recurring services
- ✓ Discounts
- ✓ Custom perks
- ✗ Credit

+ Service Membership



Discount

Give members exclusive discounts. No credit or recurring services — just access to great prices.

- ✓ Discounts
- ✓ Custom perks
- ✗ Credit
- ✗ Recurring services

+ Discount Membership

Add your Membership details

Memberships details:

Billing frequency:

Billing frequency is the length of time that your recurring membership charge covers; this can be set in any increment of weeks / months / years (every 1 month, every 6 weeks etc). The billing cycle is calculated from the membership start date. For example, if a membership starts on the 3rd of the month with a billing frequency of 1 month, the next billing will occur on the 3rd of the following month.

Recurring fee:

This is the fee you will charge the client every week, month, or year.

Signup fee:

This is a one-off fee that customers pay when they purchase the membership, in addition to their recurring fee.

Signup fee tax:

This is the tax rate added to the Sign-up Fee. Please note that tax rates are not applied to the recurring fee for credit based Memberships. Tax is applied on redemption of services.

Membership has an end:

You can set whether your membership has a duration (term limit) or whether you operate a rolling approach. The rolling approach (*setting toggle off*) is the default setting.

Basic Information

The name, frequency, and cost to the customer of the membership.

Name of membership

Platinum membership

Billing frequency

Every

1



Month



Recurring fee

\$250.00



Signup Fees

Set any one-time charges that apply when the client first joins.

Signup fee

\$150.00



Signup fee tax

No Tax Rate



Membership Duration

Control whether the membership continues indefinitely, or expires after a time.

Membership has an end



Add Membership Benefits

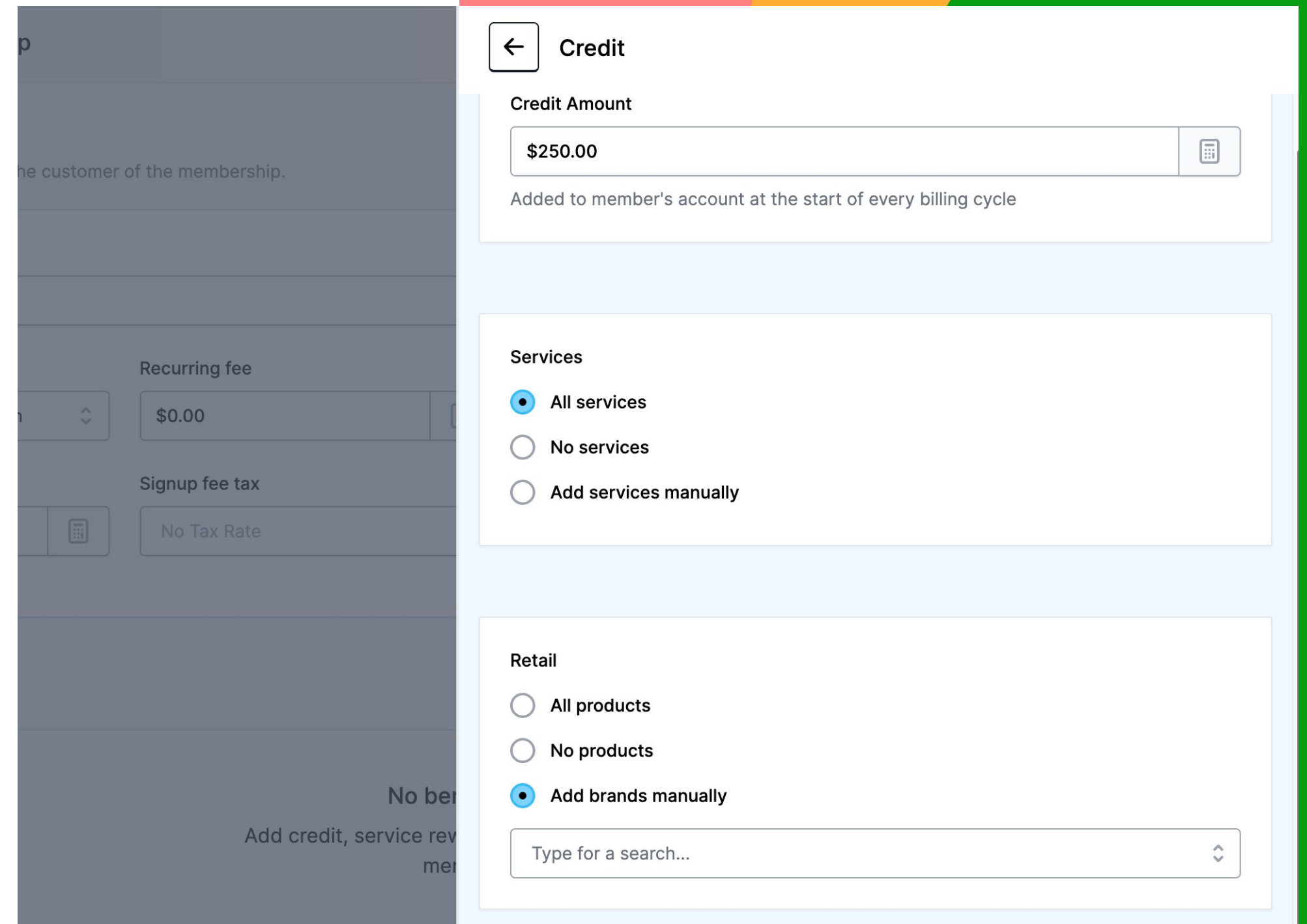
Benefits are the rewards clients receive after purchasing a membership.

Credit Membership

A Credit benefit allows clients to use a \$ amount of credit toward services and/or products each billing cycle.

To create a Credit benefit, enter the total Credit Amount and select if it applies to Services and Retail.

You can set it for all services, specific categories, individual services, all retail products, or select retail brands only.



 Credit

Credit Amount

\$250.00 

Added to member's account at the start of every billing cycle

Services

☒ All services

☐ No services

☐ Add services manually

Retail

☐ All products

☐ No products

☒ Add brands manually

Type for a search... 

Membership Benefits: Recurring Service

The Recurring Service option allows you to offer a set number of selected services that clients can redeem.

You can choose to offer a single service, multiple services, allow a choice between certain services, or create a combination of select services along with some choices.

To add multiple services, add your first service, specify the number of **Total Sessions**, click **Add Benefit**, and then repeat the process to add another service.

←

Recurring Service

or

Antioxidant Peel

×

or

Custom Facial

×

or

Cleansing Facial

×

+ Add option

Total Sessions

1

Number of services added to the member's account. Leave empty for unlimited services.

Renewal Frequency

2

Members will receive this benefit every set number of billing cycles

Cancel

Add Benefit

Membership Benefits: Sessions and Renewal

Our latest update add the option to specify how many sessions are added after each billing cycle.

This takes some maths to work out.

My memberships bills every 2 weeks, this is my billing cycle.

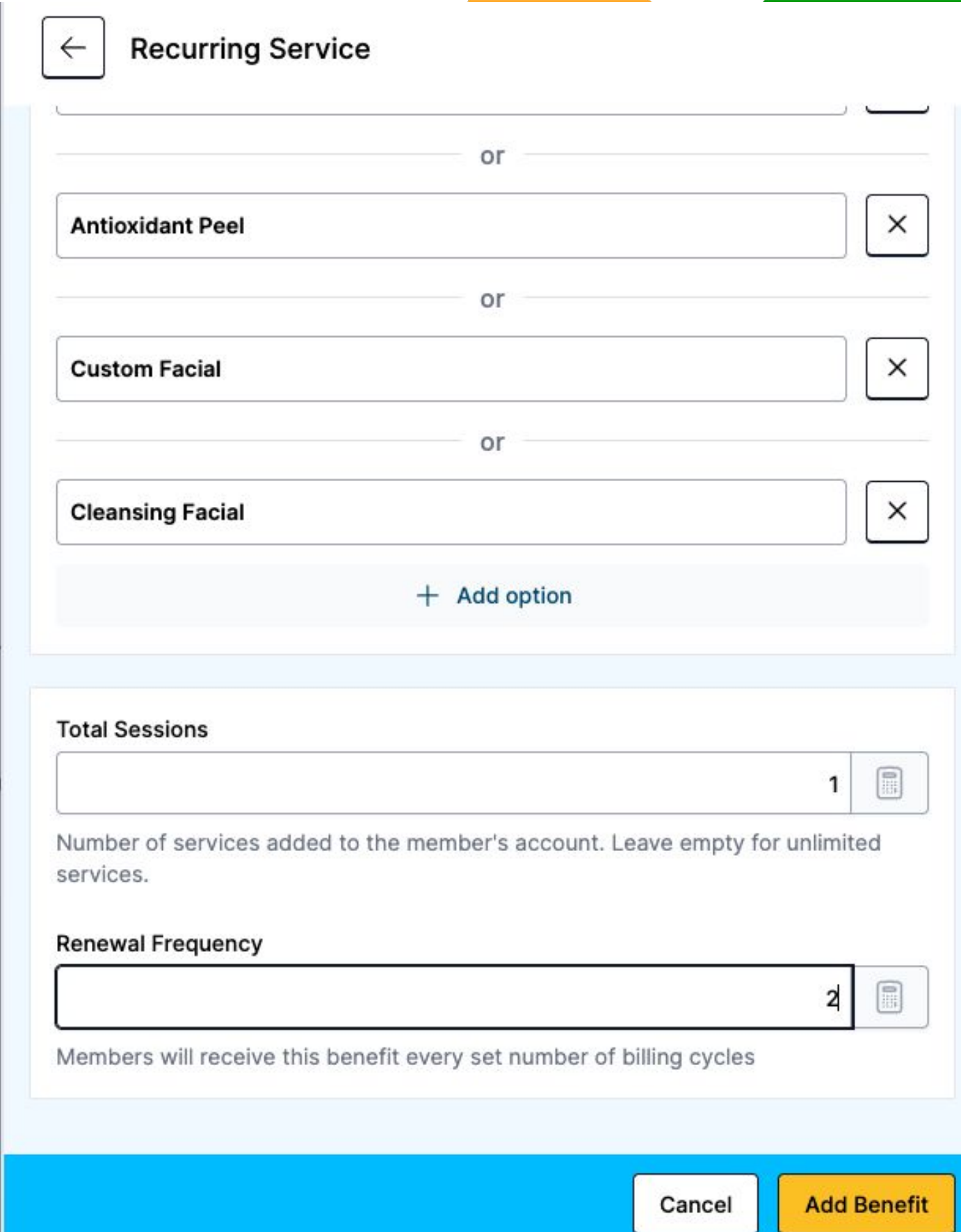
I want to give the client a choice of 1 service, every 4 weeks

So i used these settings.

I have set my total sessions as 1

This renews every 2 billing cycles (2 x my billing cycle = 4 weeks)

You can set a different number of sessions and a different renewal frequency for each service in a single membership.



The screenshot shows the 'Recurring Service' configuration screen in the Phorest app. At the top, there's a back arrow and the title 'Recurring Service'. Below this, there are three service selection rows, each with a text input field, a separator 'or', another text input field, and a close button (X). The services listed are 'Antioxidant Peel', 'Custom Facial', and 'Cleansing Facial'. At the bottom of this section is a '+ Add option' button. Below the service selection, there are two main settings sections. The first is 'Total Sessions', with a text input field containing the number '1' and a calculator icon. Below this is a descriptive text: 'Number of services added to the member's account. Leave empty for unlimited services.' The second section is 'Renewal Frequency', with a text input field containing the number '2' and a calculator icon. Below this is the text: 'Members will receive this benefit every set number of billing cycles'. At the very bottom, there is a blue bar containing two buttons: 'Cancel' and 'Add Benefit'.

← Recurring Service

or

Antioxidant Peel X

or

Custom Facial X

or

Cleansing Facial X

+ Add option

Total Sessions

1

Number of services added to the member's account. Leave empty for unlimited services.

Renewal Frequency

2

Members will receive this benefit every set number of billing cycles

Cancel Add Benefit

Membership Benefits: Sessions and Renewal

Let's look at that again,

I want to offer clients an LED service every week.

My memberships bills every 2 weeks, this is my billing cycle.

I want to give the client a choice of 1 service, every week

So I used these settings.

I have set my total sessions as 2

This renews every 1 billing cycles (1 x my billing cycle = 2 weeks)

Recurring Service

If you'd like to add a combination of services instead of a choice, simply add another recurring service benefit.

Services

Members can redeem any mix of the selected services, up to the total sessions allowance.

LED 15 min session

X

+ Add option

Total Sessions

2

Number of services added to the member's account. Leave empty for unlimited services.

Renewal Frequency

1

Members will receive this benefit every set number of billing cycles

Cancel

Add Benefit

Membership Benefits: Recurring Service continued...

← Add new membership

Share Feedback

☒ Details

☒ Benefits

☐ Online

☐ Terms

Benefits

+ New Benefit

Recurring Service (Anti Aging Facial or Antioxidant Peel or 2 others) • 1 session, every 2 billing cycles

×

Recurring Service (LED 15 min session) • 2 sessions, every billing cycle

×

You can add multiple service benefits, at different renewals to craft your perfect membership

Membership Benefits: Service Discount and Retail Discount

The Service Discount and Retail Discount options enable clients with this membership to automatically receive a set discount amount on services and/or retail purchases.

You can choose to apply the discount to all services, specific categories, individual services, all retail products, or select retail brands only.

← Retail Discount

Discount

10%

Retail

☐ All products

☒ Add brands manually

2 selected

☒ Aveda

☐ Aveeno

☐ Bioderma

☒ Dermalogica

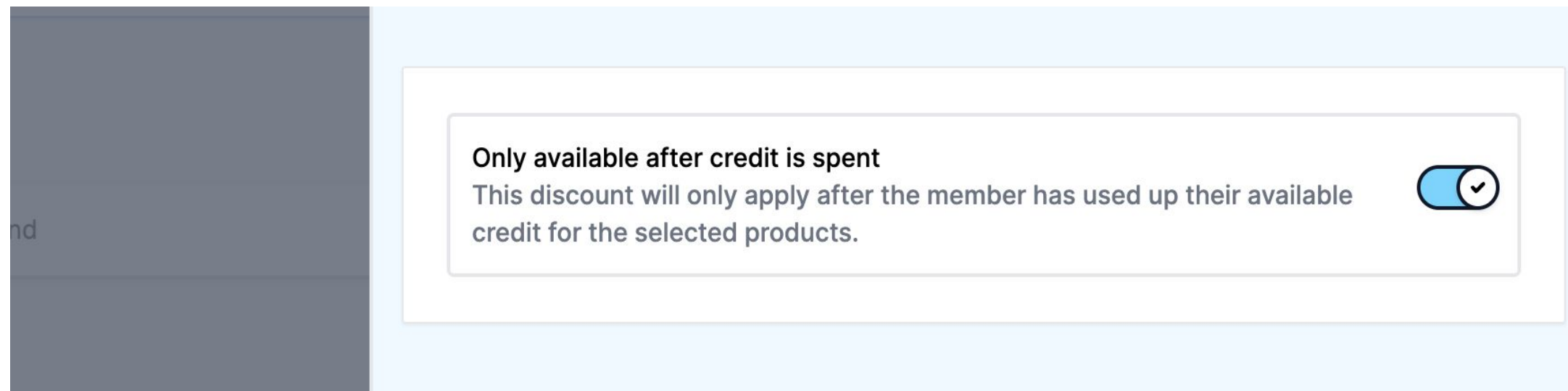
☐ Eufora

☐ Fancy Pants Brand

Membership Benefits:

Service and Retail Discount:

When creating a **Credit** type Membership, you can also choose to make the Service and or Retail discount **Only available after credit is spent**, meaning clients will only start to receive the discount automatically after they have used all of the **Credit** available to them in that billing cycle.



Membership Benefits: Custom

A Custom benefit is an informational perk added to a Membership to highlight non-monetary extras like "Free coffee," "VIP events," or "Free parking."

These benefits are not processed or booked in the Phorest system; they serve as short text items shown on the Membership Benefits tab, during online purchases, and in the client's Membership view.

Allowing Memberships to be Purchased Online

Next, choose whether your Membership can be purchased online or not.

If you allow the membership to be sold online, ensure you add a little online description too.

Online

Settings for online booking

Membership can be purchased online

Clients will be able to purchase this membership through your online booking site.



Membership can be cancelled online

Clients will be able to cancel this membership through your online booking site.



Please be aware that you are solely responsible for ensuring your cancellation policy complies with all local, state, or regional laws governing subscription services.

Adding Terms and Activating the Membership

Finally, add the Terms and Conditions (T&C's) to your *Membership* (if applicable), which will be displayed to clients online, and then click **Save** to finish.

Terms & Conditions

Terms & Conditions are turned on

Terms & Conditions

The following terms and conditions template is to be used as a guide only. Please update in line with your policies. Once saved, your terms and conditions will appear online and clients will be asked to agree before completing purchase. A copy of these terms will be emailed to clients following purchase.

Bold

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↶

↷

These Terms and Conditions govern the membership offered by **Alter Ego Salon** to individual clients ("Members"). By enrolling in the membership programme, you ("the Member") agree to the following terms.

1. Membership Term

The membership has a contract length of **12 Months**.

After the initial term, it will automatically continue on a rolling monthly basis unless cancelled.

Discard

✕ Cancel

⏪ Back

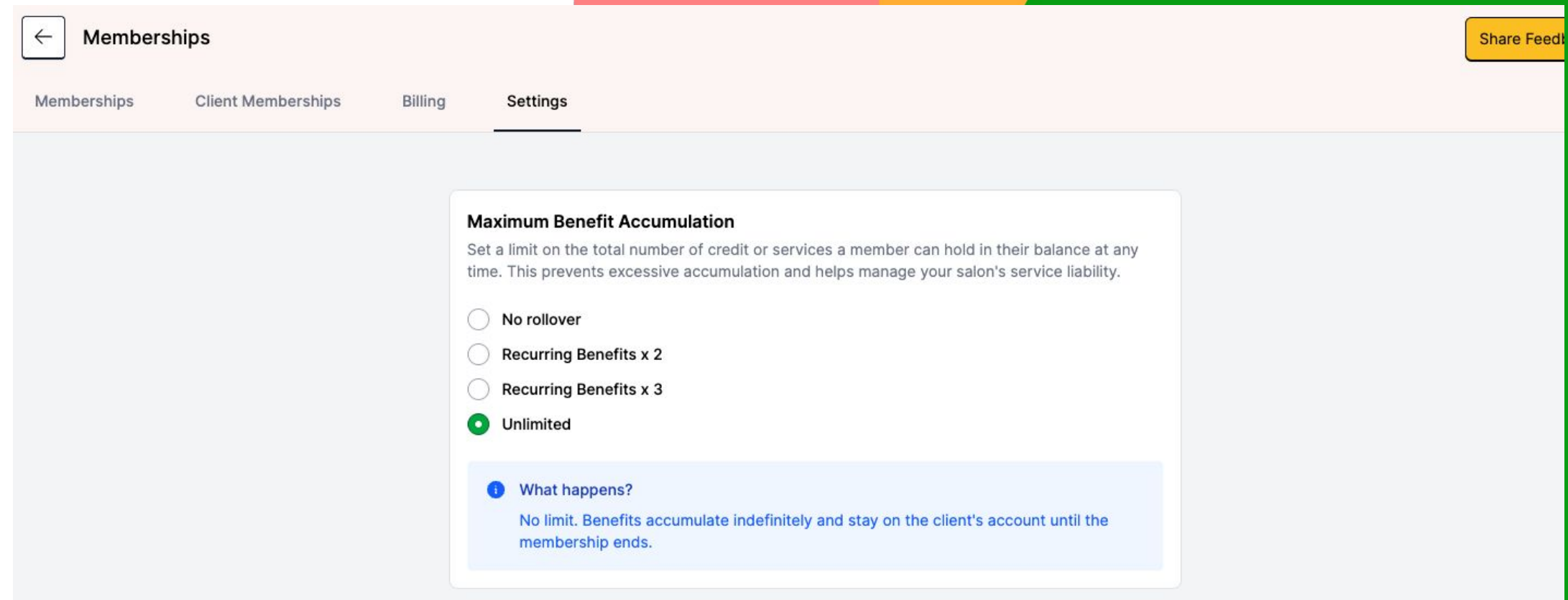
📁 Save

Membership Rollover Settings

In **Memberships -Settings**,

you can specify the maximum number of times the membership benefits can rollover.

This applies to **ALL** memberships that you sell (both service and credit) so please bear this in mind when selecting your rollover.



The screenshot displays the 'Memberships' settings page in the Phorest system. The page has a light orange header with a back arrow and the title 'Memberships'. Below the header is a navigation bar with four tabs: 'Memberships', 'Client Memberships', 'Billing', and 'Settings'. The 'Settings' tab is currently selected. On the right side of the header, there is a 'Share Feed' button. The main content area is light gray and contains a white card titled 'Maximum Benefit Accumulation'. This card explains that the setting is used to set a limit on the total number of credit or services a member can hold in their balance at any time, preventing excessive accumulation and helping manage service liability. Below this explanation are four radio button options: 'No rollover', 'Recurring Benefits x 2', 'Recurring Benefits x 3', and 'Unlimited'. The 'Unlimited' option is selected, indicated by a green dot. At the bottom of the card, there is a blue information box with a question mark icon and the text 'What happens? No limit. Benefits accumulate indefinitely and stay on the client's account until the membership ends.'

Memberships

Memberships Client Memberships Billing Settings

Share Feed

Maximum Benefit Accumulation

Set a limit on the total number of credit or services a member can hold in their balance at any time. This prevents excessive accumulation and helps manage your salon's service liability.

☐ No rollover

☐ Recurring Benefits x 2

☐ Recurring Benefits x 3

☒ Unlimited

What happens?

No limit. Benefits accumulate indefinitely and stay on the client's account until the membership ends.

Selling a membership

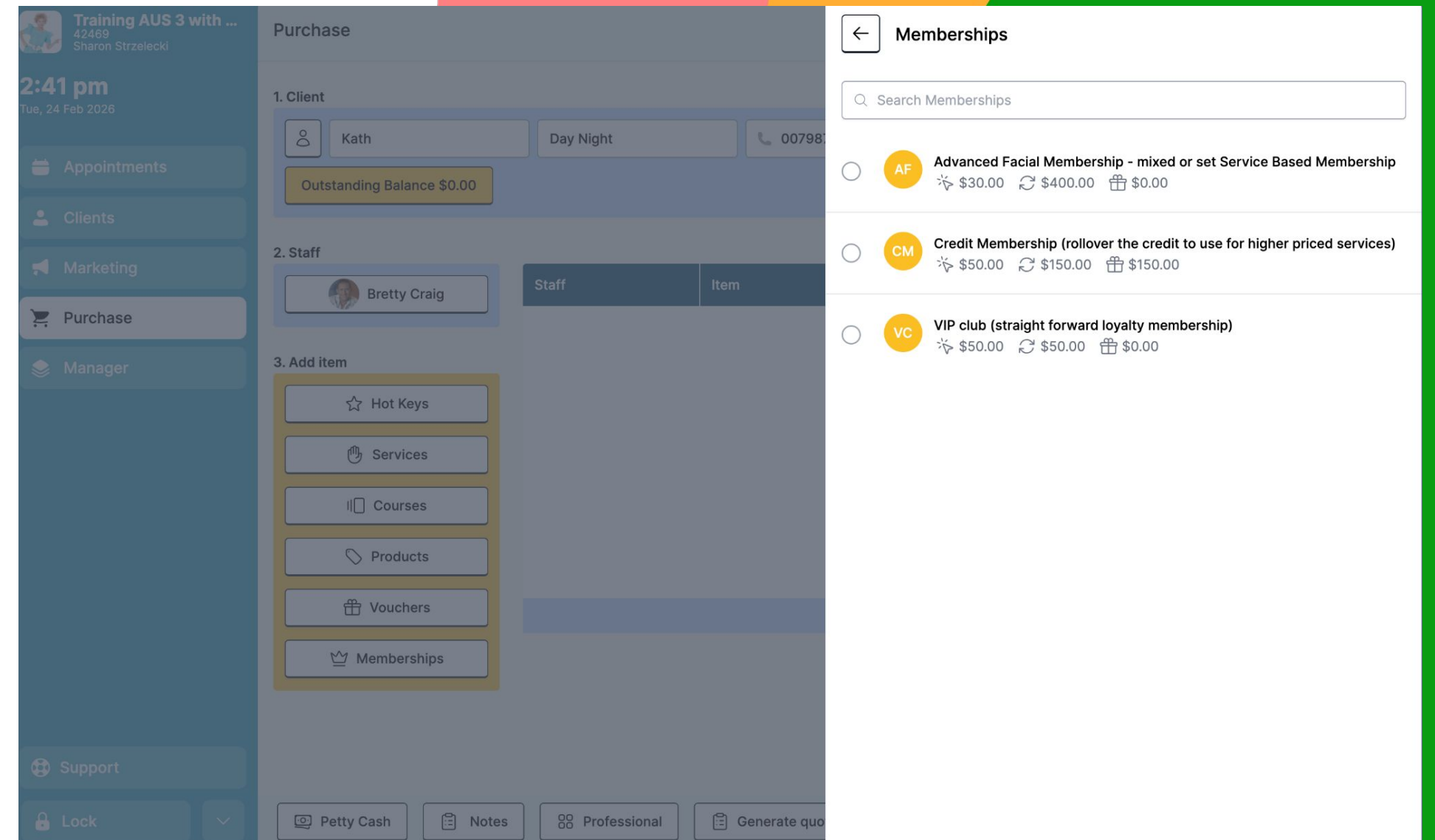
Selling a Membership

To begin selling a membership, go to Purchase > Enter the details of the client purchasing the membership, and then select a staff member selling the membership.

Next, select Memberships > choose the membership > adjust the billing starting date if you need to > Save.

Starting date is when the client is first billed for the recurring fee and can begin using Membership benefits.

To change the billing day after purchase, go to Manager > Memberships > Client Memberships > select a membership > Next Billing Date.



Signed terms & conditions

If you have completed the terms and conditions tab in the memberships setup, when selling a membership you will be presented with the terms and conditions for the client to sign

QR CODE

Use a device to scan the QR code, pass this to the client to read and sign the terms before you continue.

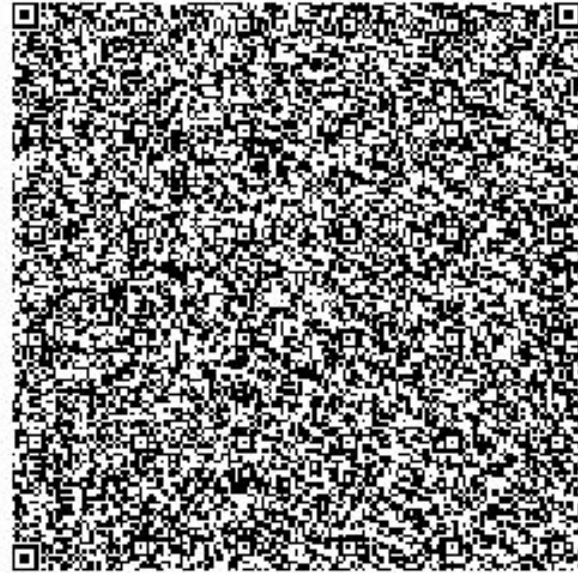
LINK

Press 'open terms' to view and sign the terms and conditions on screen.

The terms and conditions are an important step in your sales process as they protect you and the client during a dispute.

Membership Terms & Conditions

Before completing payment, please ensure the client has read and agreed to the membership Terms & Conditions.



Scan the QR code with a phone or tablet to view and sign terms.

Signed terms will be stored in client card.

[Open terms](#)

 View larger

OK

Adding a Stored Card Before Checkout

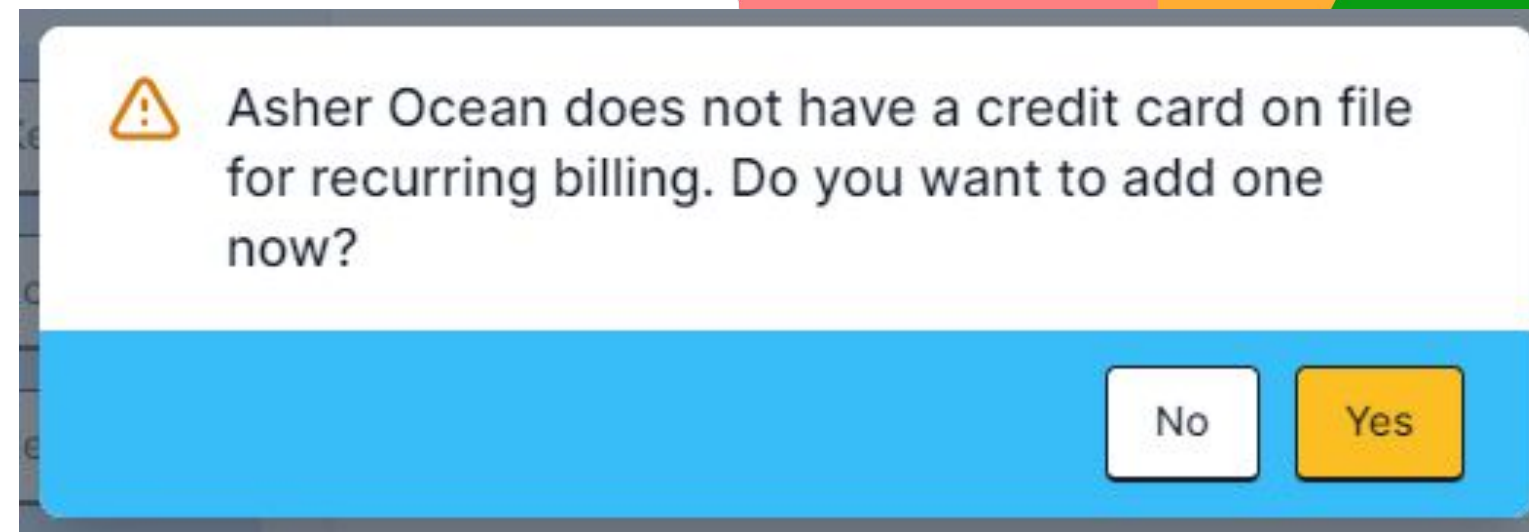
If the client **doesn't have a stored card on file**, you'll receive a prompt asking if you'd like to add one now.

This will prompt your PhorestPay terminal for a client to tap or inset their payment card.

Note: this need to be a card, Apple / Google pay details cannot be stored

If you don't have a PhorestPay terminal, you will need to put a deposit on a future appointment and save the card details on file.

[Taking a deposit helpsheet](#)



Using a membership

How does a client redeem Membership Credits

Click Pay on the appointment. Phorest will automatically recognize that the client has an active membership with credits and apply the credits to the purchase.

Membership will show you how much of the service is being paid for by the membership.

Amount Due will display the amount the client still owes after the membership credits have been applied.

If the client has an Amount Due after credit has been applied, select the appropriate payment type and then click Pay again to complete the transaction.

Clicking Pay

Click Pay. The amount due will equal \$0 (*Once the client has not exceeded their value of benefit*). Click Pay once again to complete the sale. Clients holding a membership can opt to pay for services outside of that membership and will be expected to pay as normal.

The screenshot displays the Phorest POS interface during a transaction. The '1. Client' section shows 'Asher Ocean' with an 'Outstanding Balance \$0.00'. The '2. Staff' section shows 'Cahir Hennessy'. The '3. Add item' section lists 'Hot Keys', 'Services', 'Series', 'Products', 'Gift Cards', and 'Upsells'. The main table shows a service 'Blowdry' for \$40.00. The bottom right corner, highlighted with a red box, shows 'Membership: -\$40.00' and 'Amount Due: \$0.00'. The bottom bar includes buttons for 'Petty Cash', 'Notes', 'Professional', 'Generate quote', and 'Pay'.

Staff	Item	Quantity	Discount	Price	
Cahir Hennessy	Blowdry	1	None	\$40.00	⋮ X

Service total: \$40.00

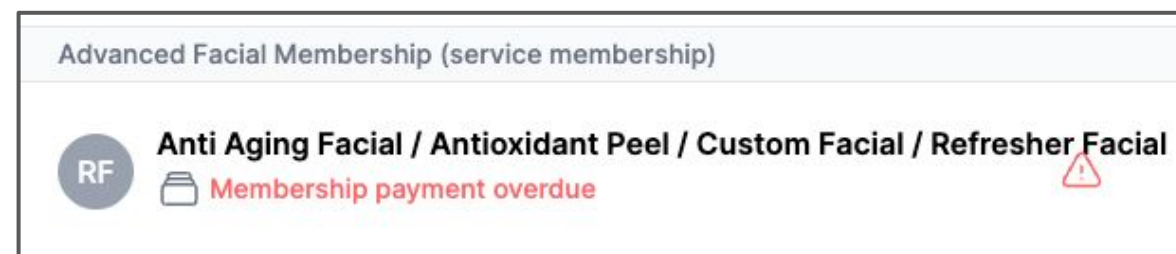
Membership: -\$40.00
Amount Due: \$0.00

How does a client redeem Membership Services

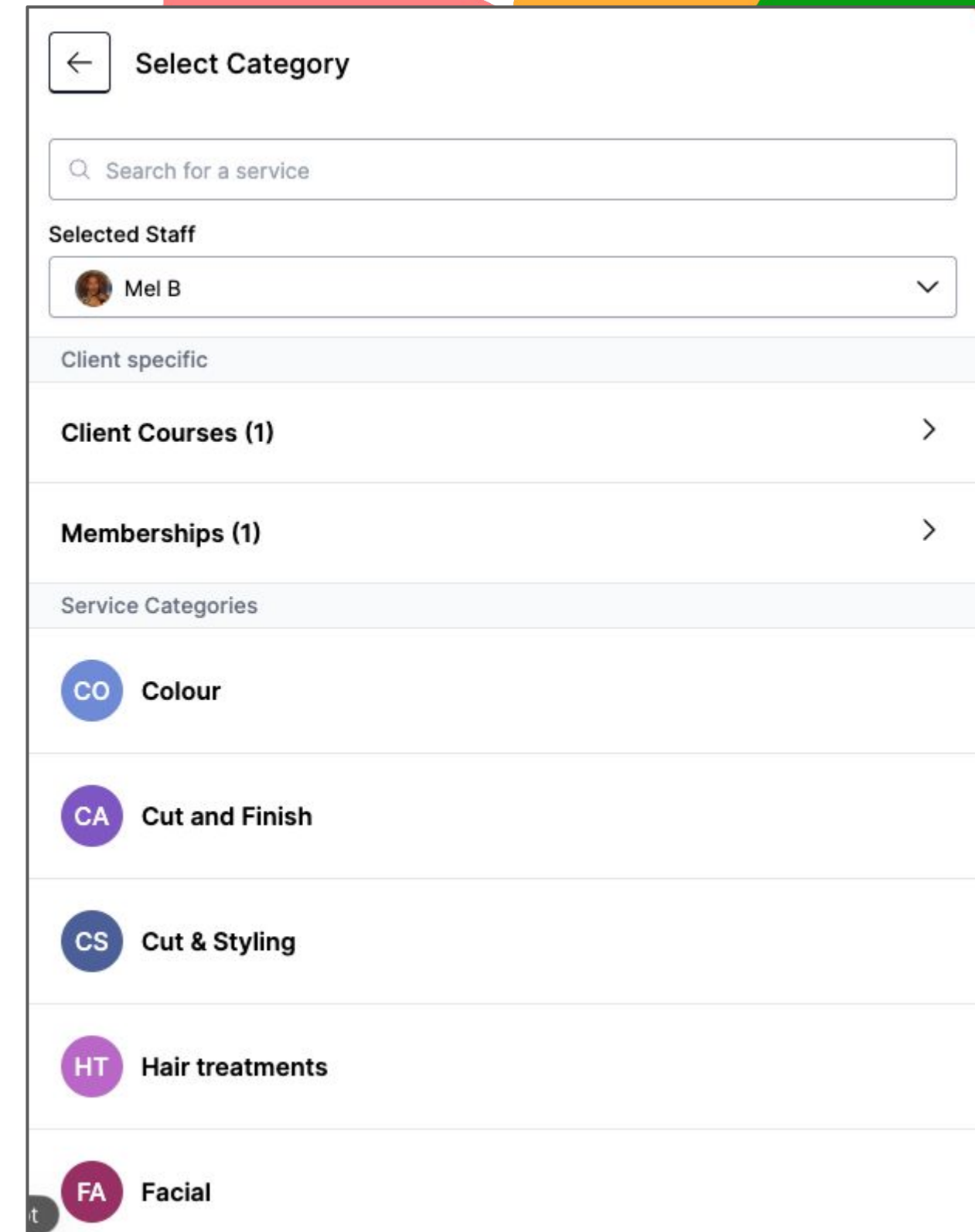
Double click to book your client's appointment,
Select the client,
Above the services category, you will see **memberships**.

Select the membership service you would like to book in from the choices in the list.

Look out for warnings advising you of an issue with the clients membership



Pay out the appointment as normal,
You will see any service part of the membership will be \$0



Managing a membership

View a client's Membership information

Go to **Manager > Memberships > Client Memberships** to view a list of clients who have purchased a Membership.

Click on a membership to view the **Details**.

It is not possible to edit the client name or, the membership type.

It is possible to edit the Next Billing Date, change the Status from Active to Frozen or Cancelled, and add any Notes to the client's membership.

You can view the clients signed terms and conditions (if completed)

You can pick a billing card (if the client has multiple on account)

Click the History tab at the top to view a history of the membership's purchase date, successful billings, and when it was used.

Memberships				
Client Memberships				
Billing				
First name		Last name		All statuses
☐		☐ Cancelled		
Client Name	Membership Name	Status	Next Billing Date	
☐ Adam Bell	Blowdry Membership 5X	Active	October 1, 2024	
☐ Asher Ocean	Blowdry Membership 5X	Active	October 10, 2024	

← Client Memberships

DetailsHistory

Client membership details

You can edit the next billing date, and freeze the membership here.

Client

Membership

Membership Type

Credit

Status

Active

Membership Start Date

12 Nov 2025

End date

No End

Next Billing Date

6 May 2026

Payment Card

No card on file

Terms & Conditions

View Signed Terms & Conditions

Membership Billing

You can access the Membership billing tab by going to **Manager > Memberships > Billing**. The Billing screen is broken into three sections: Billing Due, Billing Failed, and Billed OK.

Billing Due

The billing due screen displays all client memberships scheduled for billing on that day.

There are three options in the lower corner:

Skip Billing: The client will not be billed for this month; they will be billed the same day the following month. The client will not receive any credits for the skipped month.

Manually Billed: This will give the client the credit for the membership period without charging their card.

Charge: Bill the client now instead of waiting for the system to bill automatically that night. This will immediately start the new membership period and give the client credits.

Memberships

Memberships Client Memberships **Billing**

Billing Due Billing Failed Billed OK

Memberships Client Memberships **Billing**

Billing Due Billing Failed Billed OK

First name Last name ☐ This branch only

	Due Date	Client	Membership	Frequency	Amount	Credit Card
☐	September 10, 20...	Asher Ocean	Blowdry Members...	Monthly	\$160.00	-
☐	September 11, 2024	Brian Finnegan	Blowdry Members...	Monthly	\$160.00	visa, XXXXXXXX...

Showing 1 to 2 of 2 results

Skip Billing Manually Billed Charge

Membership Billing Failed

The Billing Failed screen will display all memberships that failed billing, with the status and decline reason.

This screen displays two options: **Freeze Membership**, which suspends billing until the freeze is lifted, and **Move to Billing Due Tab**, which allows you to attempt to charge the client again.

Note: There is no automatic retry for failed payments, you must move them to the Billing Due tab to retry the payment.

Billing Due						
Billing Failed						
Billed OK						
First name		Last name		☐ This branch only		
☐	Due Date	Client	Membership	Credit Card	Status	Decline Reason
☐	September 9, 2024	Asher Ocean	Blowdry Members...	-	No Card	-
☐	September 9, 2024	Jon Lake	Relaxation Memb...	-	No Card	-
☐	September 10, 20...	Shane Caplice	Blowdry Members...	-	No Card	-
Showing 1 to 3 of 3 results						
Freeze Membership						
Move to Billing Due Tab						

Membership Billed Ok

The **Billed OK** screen displays all memberships that were billed successfully.

Refunding a Membership Fee

You can refund a Membership fee by going to Manager > Sales > Finding the sale, and clicking Refund. For a detailed guide on refunding membership fees, [click here](#).

Billing Due Billing Failed **Billed OK**

From date

To date

☐ This branch only

Billed Date	Membership Period Start	Client	Membership	Amount	Transaction ID
September 8, 2024	September 8, 2024	Adam Bell	Blowdry Members...	\$160.00	pi_3Pwlf6Ftm8fjry...
September 8, 2024	September 8, 2024	Asher Ocean	Blowdry Members...	\$160.00	-
September 8, 2024	September 8, 2024	Bad Bad	Blowdry Members...	\$160.00	pi_3PwkrpFtm8fjr...
September 8, 2024	September 8, 2024	Cahir Hennessy	Blowdry Members...	\$160.00	pi_3PwjR8Ftm8fjr...
September 8, 2024	September 8, 2024	Katie Eckenrode	Relaxation Membe...	\$150.00	pi_3Pwf7fFtm8fjry...
September 7, 2024	September 7, 2024	Katie Eckenrode	Blowdry Members...	\$160.00	pi_3PwWsaFtm8fjr...
September 7, 2024	September 7, 2024	Katie Eckenrode	Relaxation Membe...	\$150.00	pi_3PwZ8CFtm8fir...

Showing 1 to 20 of 75 results

<

1

2

3

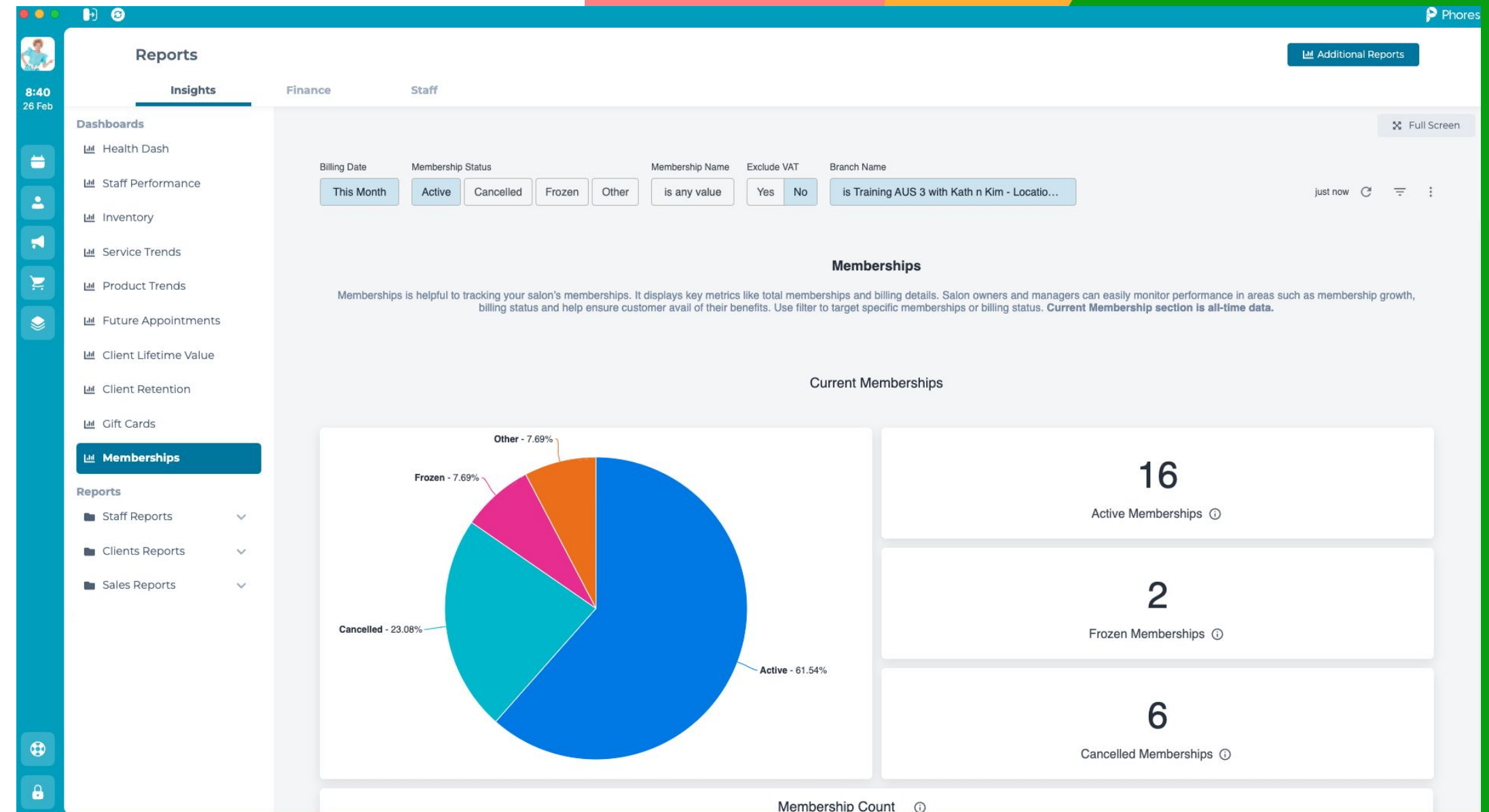
4

>

Membership Reporting

To access the Membership report go to **Manager > Reports dashboard > Memberships**.

Scroll down to view the Membership breakdown and billing information.

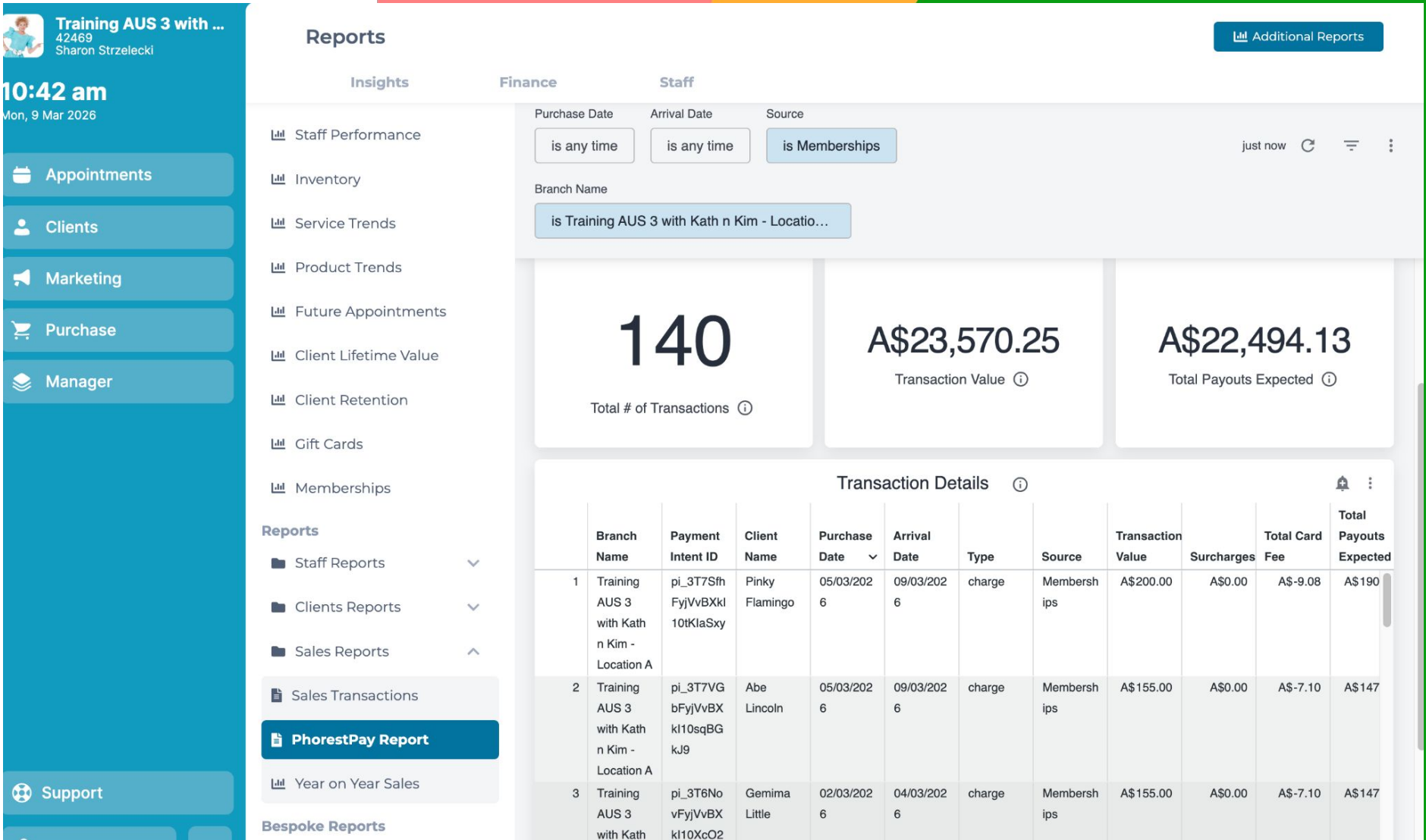


PhorestPay Report

Just like deposits you will find a list of successful transactions in your PhorestPay Report. Go to **Manager / Reports / PhorestPay** You will see a detailed transaction list, select the source at the top of the screen as "Memberships" to only view membership transactions.

Here you can see the number of transactions, the total value and the payout value (what you will receive after the transaction fee is deducted).

The transaction fee for memberships is 3.2% +GST for all successful membership transactions.



Marketing your Memberships

Create a campaign and target your top spending clients letting them know about your new membership options.

Or

Use the Membership filter to target either the Previous or Active members of a particular Membership that you have already created.

FILTER OPTIONS

Spend
Enter an amount or number to find matching clients

The top spending ▼ 10 Clients

Cancel Save

FILTER OPTIONS

Memberships
Target clients by membership

Client is An active member ▼ of Credit Membership (rollover t... ▼

AND

Cancel Save

Help Sheets

- Setting up Memberships and their different types
 - How do I sell a membership
- How do I add a client's Membership that was originally purchased in another system outside of Phorest?
 - How do I view a client's Membership information?
- How can I limit how much Membership credit or services a client can build up?
 - How does a client redeem Membership credits?
 - How to I cancel or freeze a membership
- How do I view client Membership Billing information?

Phorest Academy

Phorest Memberships

FAQ's

- **Q: What is a membership renewal cycle?**

A: A renewal cycle lets a salon define how many billing cycles must pass before a membership's service benefits refresh, rather than always refreshing every billing cycle.

- **Q: Can a salon offer quarterly benefits on a monthly billing plan?**

A: Yes. Renewal cycles let salons decouple benefit refresh cadence from billing frequency, so a monthly membership can have benefits that renew every 3 billing cycles, for example.

- **Q: Does this affect existing memberships?**

A: No. Existing memberships are unaffected unless a salon explicitly configures a new renewal cycle when creating or editing a membership.

- **Can I see the Membership T&C's that the client signed?**

A: Yes, you can click on the "View Signed T&C's" button from a client's individual membership screen in their client card or in the Client Memberships screen

Missing Features?

[Click here](#)

Phorest Grow Homepage

[Click Here](#)