Phorest

Memberships

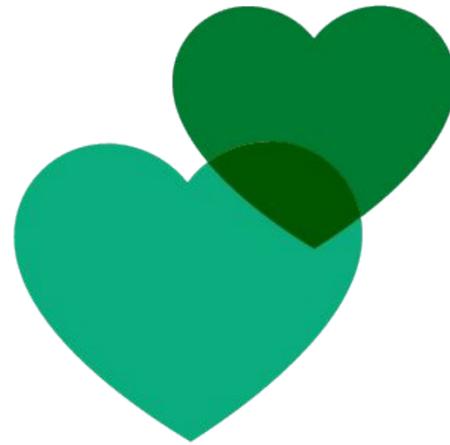# Watch the recording

Contents:

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Benefits of using Memberships:

Make every client a regular, build predictable revenue and deeper client relationships with a membership program that fits your business.
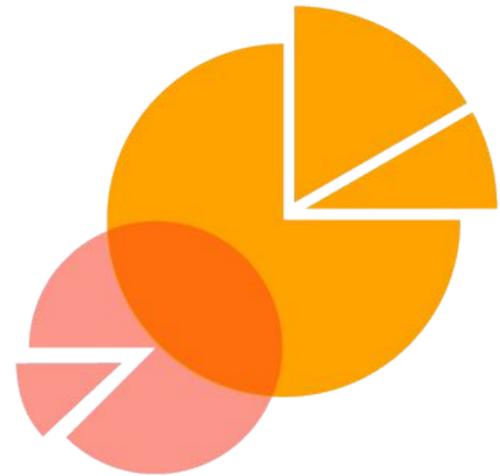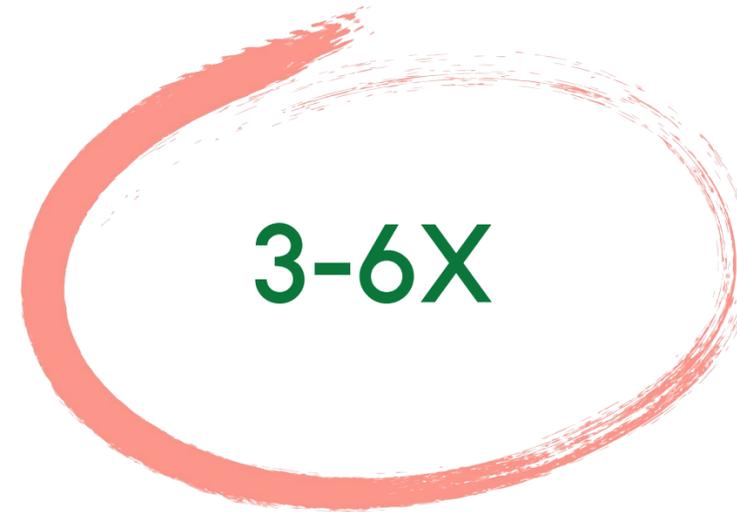
+30-60%

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

3-6X

Loyal clients that are part of a Membership spend more annually

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Benefits of using Memberships:

Education

Memberships facilitate a repeated client journey with the opportunity to build on client education

Commitment

Memberships encourage a "use it or lose it" mentality

It taps into accountability and client motivation

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.

Click here for our Memberships help sheet

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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Contents slide

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

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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

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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.

When a client's credit is unused, the amount will automatically roll over to the next billing period. If you'd like to adjust this setting, please click here to get in touch, and we can adjust this for you.

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...

Recurring fee

$0.00

Signup fee tax

No Tax Rate

he customer of the membership.

No ber
Add credit, service rev
mer

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Membership Benefits: Recurring Service

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

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

Services

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

Relaxation Massage ✕

+ Add option

Total Sessions

5 🧮

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

Cancel   **Add Benefit**

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Membership Benefits: Recurring Service continued...

Recurring Service

To create an option of services, add one service and then click **Add option** to add another. When specifying the **Total Sessions** in a choice, the number of remaining sessions is reduced each time one of the choices is booked.

Services

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

Relaxation Massage ✕

or

Aromatherapy Massage ✕

+ Add option

Total Sessions

5

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

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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

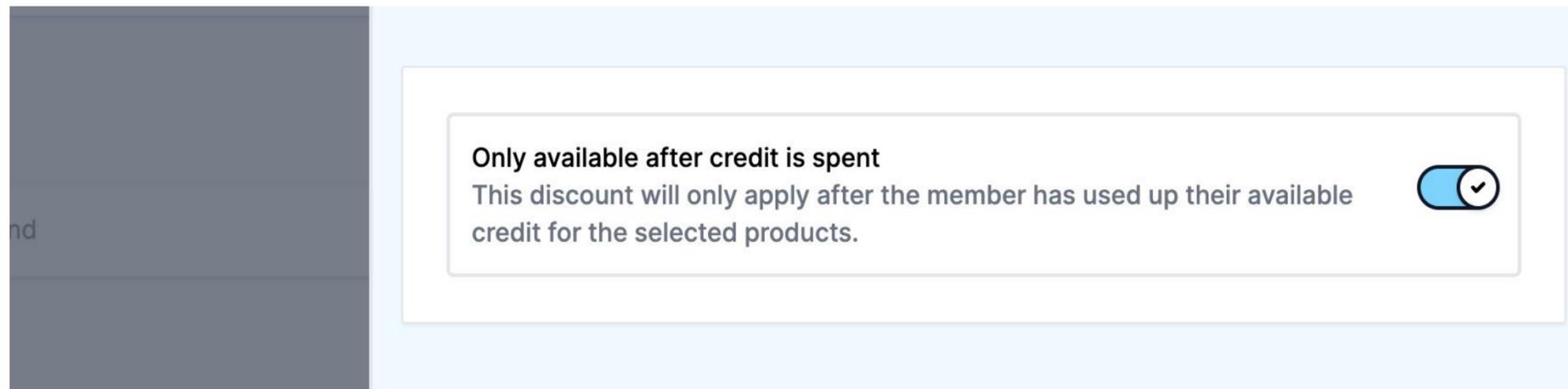☐ Bioderma

☑ **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.

Only available after credit is spent
This discount will only apply after the member has used up their available credit for the selected products.

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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.

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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.

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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.

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.
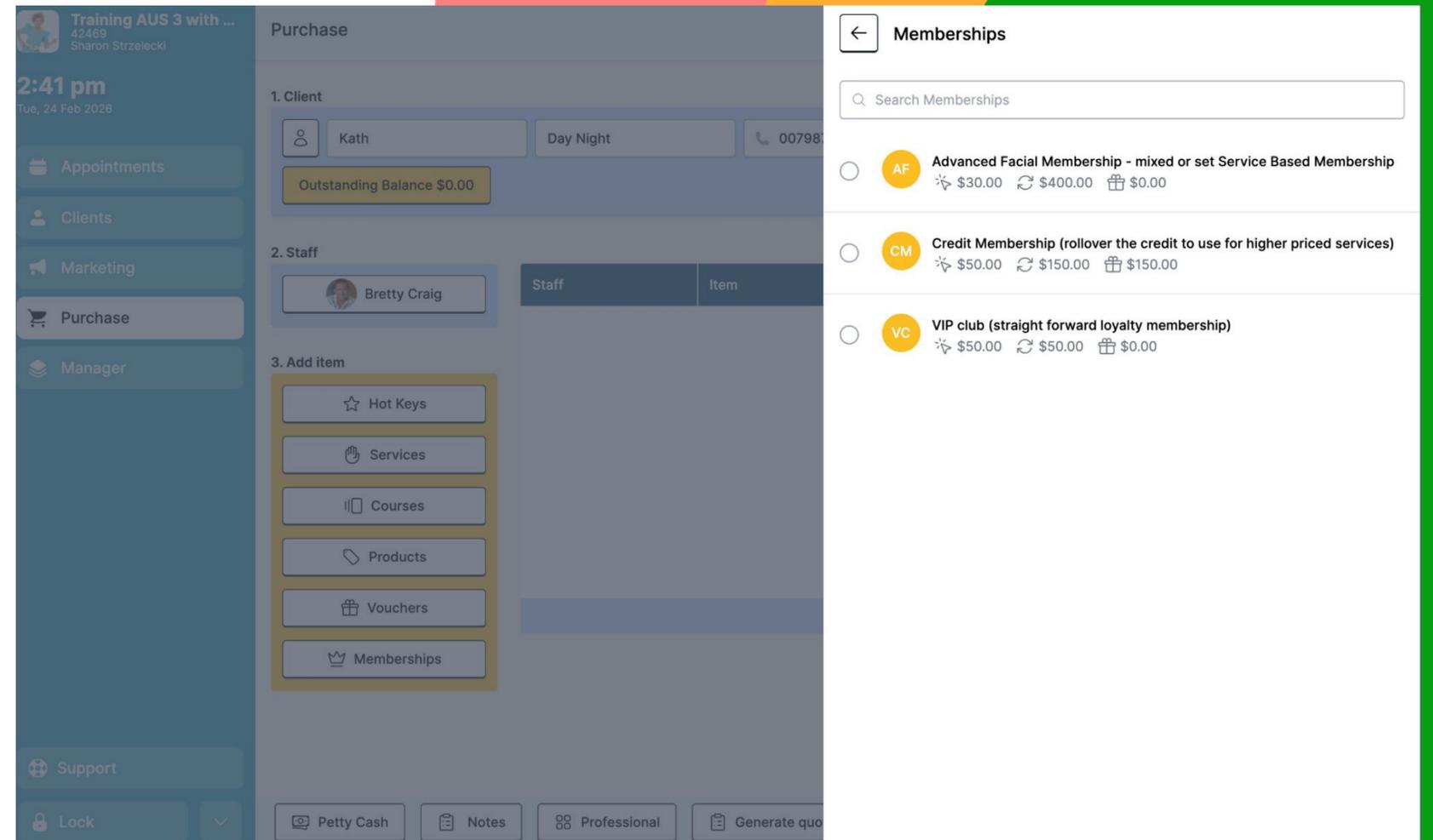
Adding a Stored Card Before Checkout

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.

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

> ⚠ Asher Ocean does not have a credit card on file for recurring billing. Do you want to add one now?
>
> No   Yes
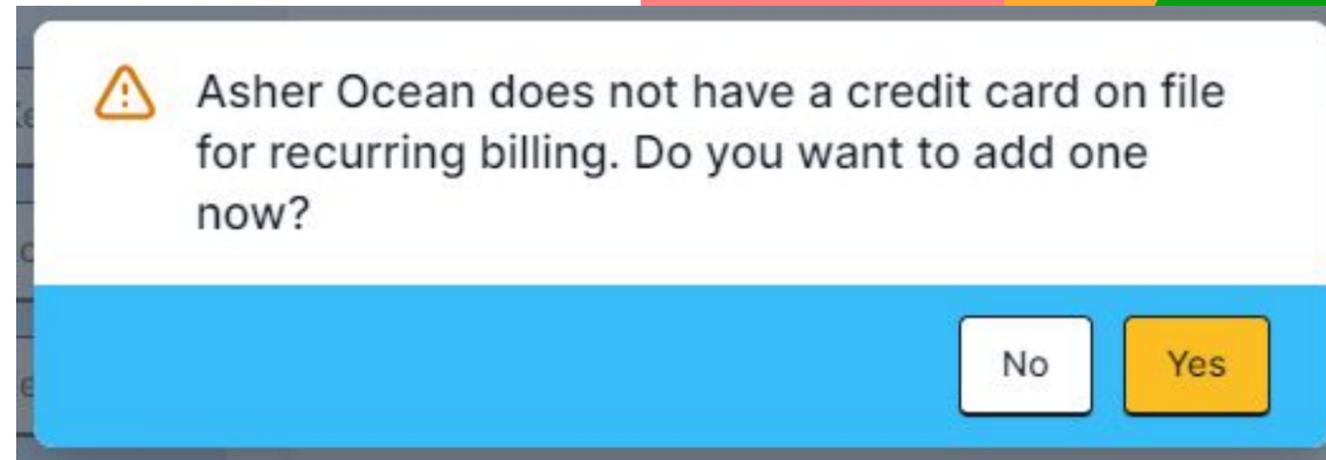
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How does a client redeem Membership Credits

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.

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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, the Membership, or the Remaining Benefit.

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

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

Details | History

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

Client
Asher Ocean

Membership
Blowdry Membership 5X

Next Billing Date
Oct 10, 2024

Remaining Benefit
$200.00

Status
Active

Notes
Add any notes for this client membership

Notes
Add any notes for this client membership

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Contents slide

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.

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

	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_3PwIf6Ftm8fjry...
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.
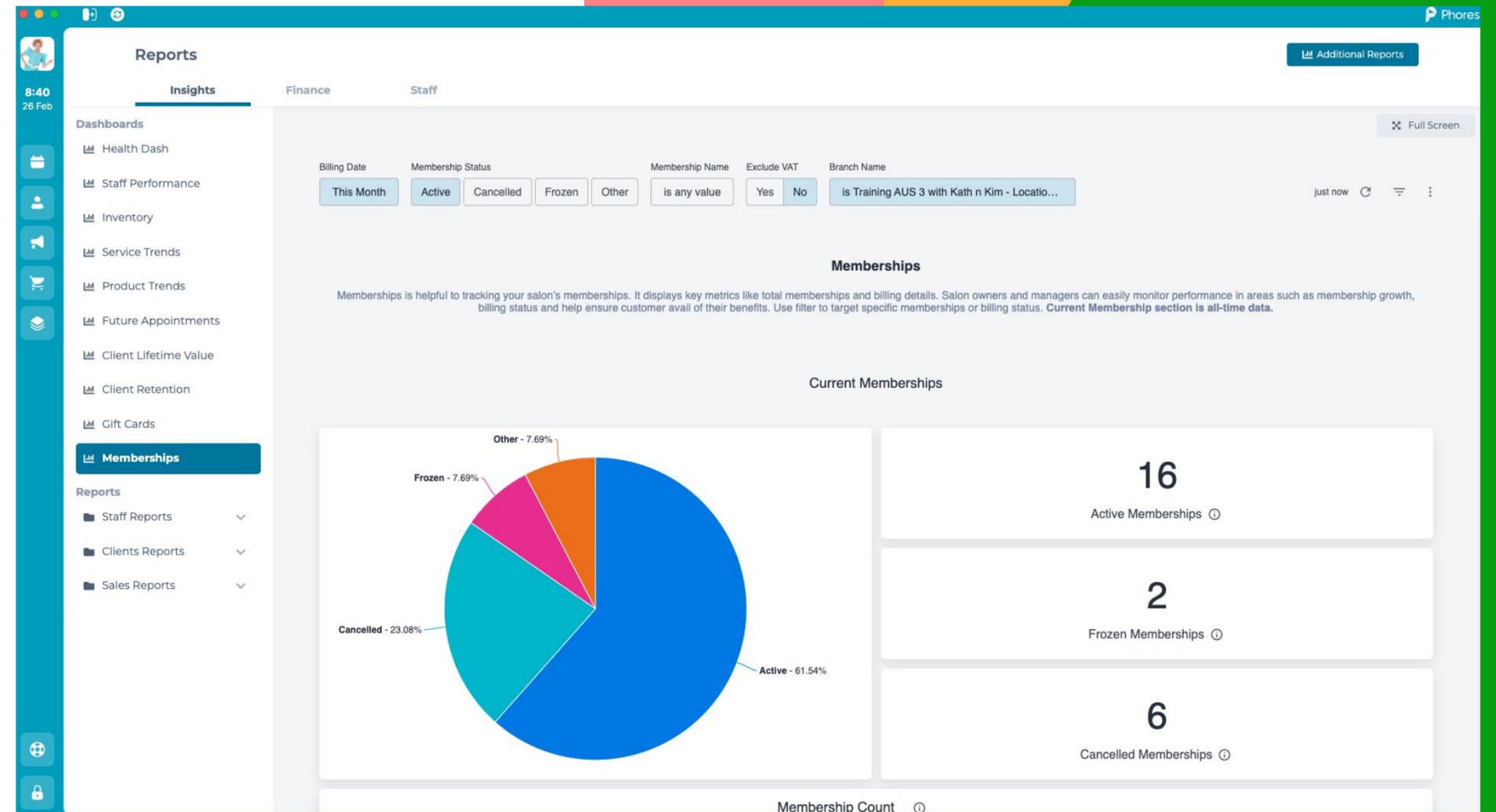
PhorestPay Report

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.

Missing Features?
Click here

Phorest Grow Homepage
Click Here

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