



DataTrak/
Membership and Operations
Comparison

Membership and Operations Guide

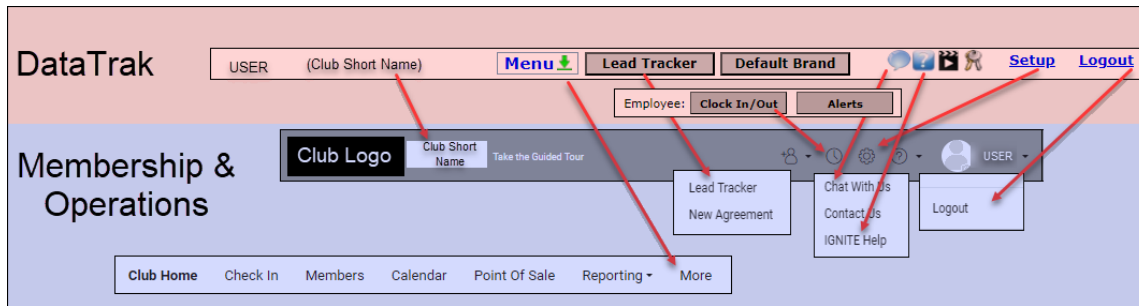
DataTrak / Membership & Operations Comparison







The following are the main differences you will see when you upgrade from DataTrak to Membership and Operations.


- [Navigation](#)
 - [Breadcrumbs \(new!\)](#)
- [Club Occupancy](#)
- [Club Home \(new!\)](#)
- [Attended Checkin](#)
- [Member Search](#)
- [Member Dashboard \(new!\) and Details](#)
 - [Agreement Buttons](#)
- [Calendar](#)
- [Point of Sale](#)
- [Reporting](#)
- [More Menu](#)

Navigation

The following image compares the location of various navigation features in DataTrak to Membership and Operations.

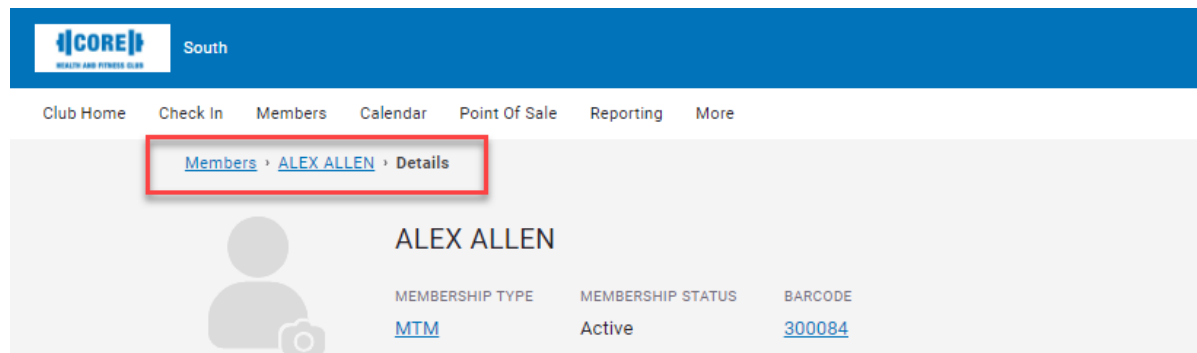


Moved Features	New Features
<ul style="list-style-type: none"> • The Menu moved to More in the navigation bar. • Setup moved to Settings  in the toolbar. • Lead Tracker moved to Lead Tracker in the  New Agreement drop-down menu in the toolbar. • Employee Clock In/Clock Out has moved to  Clock In/Clock Out in the toolbar. • Message Us moved to Chat With Us in the  Help drop-down menu in the toolbar. • Logout moved to Logout in the user drop-down menu. 	<ul style="list-style-type: none"> • The Take the Guided Tour link will open a series of pop-ups that will point out the features of Membership and Operations. • The New Agreement link in the  New Agreement drop-down menu will begin a new member agreement (Electronic Agreement Entry). • Click the username or user image to edit your user profile. • The  Help link will open a drop-down menu that includes Chat With Us, Contact Us, and IGNITE Help documentation.

 **Tip:** See [Navigation Bar](#) and [Toolbar](#) for more information.

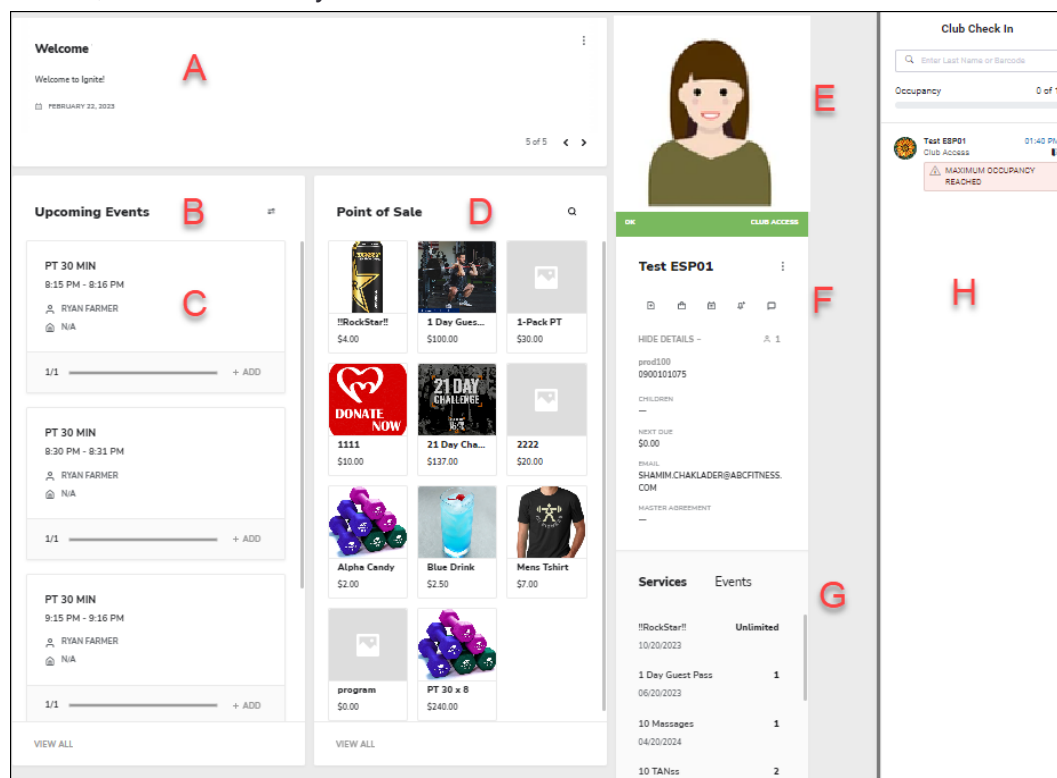
Breadcrumbs

Breadcrumbs will appear at the top of the Member and POS pages. Click the links that appear in the breadcrumbs to retrace your steps.



Club Home

Club Home is a new page that can be set as the default page to open when you log into Membership and Operations. This page provides a quick overview of the club including announcements, upcoming events, and links to sell your featured POS items.

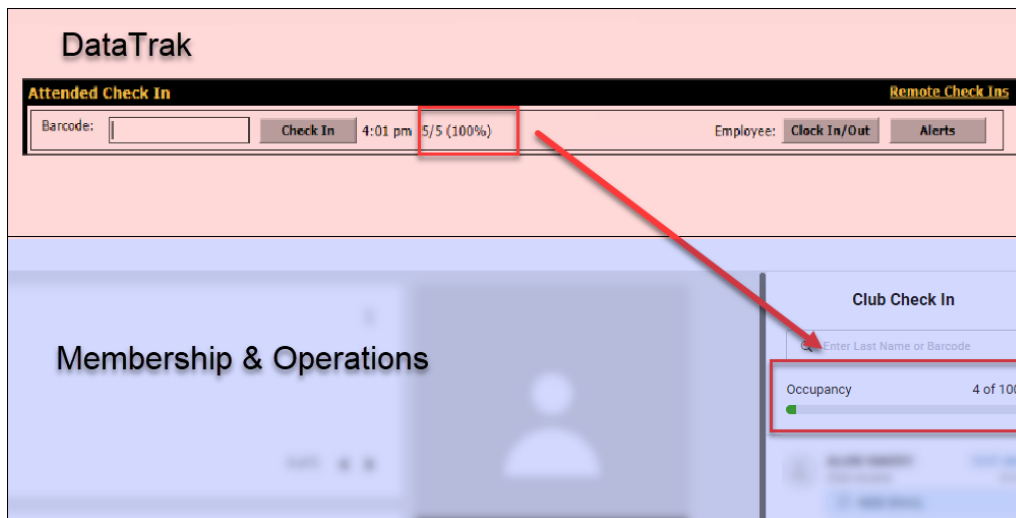


A	<p>Club Announcements</p>	<p>This panel shows today's date and the announcements for the day. Announcements appear below the date on which they were created. Click the bottom right arrow to cycle through announcements. These announcements will cycle automatically every five seconds. The label "New" will appear for 24 hours after the creation of an announcement. New announcements will be displayed first.</p> <p>Learn more about Club Announcements.</p>
B	<p>Upcoming Events</p>	<p>This panel lists the upcoming events at the club. Each event tile shows the event name, scheduled time, employee, location, and number of members scheduled to attend.</p> <p>Learn more about Upcoming Events.</p>
C		<p>Click an individual event to view or edit it.</p> <p>To view all events, scroll to the bottom of the page and click View All. The calendar will open.</p>
D	<p>Point of Sale</p>	<p>This panel provides easy access to frequently sold items (Featured Items). Each item tile shows the item name, image, and unit price.</p> <p>Learn more about Point of Sale on Club Home.</p>
E	<p>Member Photo</p>	<p>The Member Photo module allows you to take, upload, view, and replace the member's photo. Only images that are less than 5 MB and in the format.png, .jpg, or .jpeg will be permitted.</p> <p>Learn more about Member Photo.</p>
F	<p>Member Profile</p>	<p>By default, the most recently checked-in member will appear in this panel. You can view the profile of other members by clicking a name listed in the checkin pane.</p> <p>The member panel shows the member's photo, name, current status, barcode, agreement number, membership type, notes, and total number of members attached to the primary agreement. To display additional fields such as last sync date or locker number, navigate to <i>Settings>Club Home>Member Profile</i>.</p>

		<p>Summaries of the member's payment amounts, purchased services, and scheduled events are also displayed.</p> <p>Learn more about the member profile.</p> <p>Learn more about Club Home settings.</p>
G	Member Details	<p>Click Show Details to show the member's barcode, agreement number, and billing information.</p> <p>Learn more about Member Details.</p>
H	Club Check In Pane	<p>When enabled, the Club Check In Pane is visible on every page in Membership and Operations. This pane can be collapsed and expanded at any time.</p> <p>Clicking an alert in this pane will direct you to the appropriate page. For example, clicking a Payment Overdue alert will open a Point of Sale transaction with the member and overdue amount already loaded.</p> <p>Learn more about the Club Check In Pane.</p>

Club Occupancy

The Club Occupancy counter has moved to the Club Check In Pane.





Tip: See [Manage Occupancy](#) for more information.

Attended Checkin

The following table and images compare the Attended Checkin Page in Membership and Operations and DataTrak.

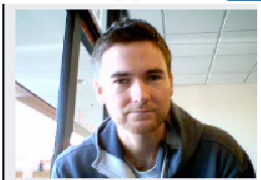
A	The Member Photo, Services, and Events modules remain on the left side of the page.
B	The member pane still shows the member's name and alerts. In Membership and Operations, many of these alerts will link to the appropriate page. For example, clicking a Payment Overdue alert will open a Point of Sale transaction with the member and overdue amount already loaded.
C	In DataTrak, the drop-down Member Pages menu provided links to member pages. In Membership and Operations, you can click the member's name to open the member dashboard. If you need more details, you can continue to the member details pages. Learn more about the member dashboard .
D	Member Details, including notes, agreement type and number, and invoice dates and amounts are still listed in the same area. Learn more about member details . The Remote Checkins tab that was present in this section in DataTrak have been moved in Membership and Operations to <i>More>Check In>Remote Checkins</i> . The Check In Display tab has been moved to Check In Display and <i>More>Check In>Check In Display</i> .

MEMBERSHIP & OPERATIONS

Club Home **Check In** Members Calendar Point Of Sale Reporting More

Attended Check In

Photo A Add



Services POS

Name	Count	Expires
Belly Dancing Now	1	--
UFC Training	9	--

Events Quick Enroll Calendar

Name	Date/Time	Location

Member Create Alert

BA B TESTING C

Alerts

PENDING CANCEL 09/13/2022

Member Details

Membership Type	24M	Last Visit	04/18/2023
Barcode		Agreement #	0900300018
Notes	View Create	Secondary Members	3
Past Due	\$0.00	Next Due	\$0.00
Late Fee	\$0.00	Service Fee	\$0.00
Total Next Due	\$0.00	Total Past Due	\$0.00
ABC Account	Credit Card	Club Account	Credit Card
Last Sync Date		Sync Flag	No D
Begin Date	01/20/2017	City	
Date of Birth	01/01/1941	Home Phone	
Current Status	PENDING CANCEL	Email	
Agreement Misc 1		Agreement Misc 2	
Agreement Misc 3		Agreement Term	Open
Campaign		Club Account Balance	\$0.00
Emergency Extension		Emergency Phone	


DATATRAK

Attended Check In

Barcode: **Check In** 11:33 am Employee: **Clock In/Out** Alerts

Photo Remove Take

A



Services POS

Name	Count	Expires

Events Quick Enroll Calendar

Date Time	Event Employee Location

Member Create Alert Member Pages

ANDERSON, AARON B C

Alert

MEMBERSHIP CANCELLED 11/20/2019

NO CHECK IN IN 762 DAYS

MEMBER DETAILS CHECK INS REMOTE CHECK INS Check In Display


Membership Type:	Lifestyle Gym	Last Visit:	03/22/2021
Barcode:	256033	Agreement #:	
Notes:	View Create	Secondary Members:	
Past Due:	\$0.00	Next Due:	\$25.39
Late Fee:	\$0.00	Service Fee:	\$0.00
Total Next Due:	\$25.39	Total Past Due:	\$0.00
ABC Account:	EFT	Club Account:	N/A
Last Sync Date:	03/14/2023	Sync Flag:	Yes
Next Due Date:		Agreement Term:	Installment

D

Member Search

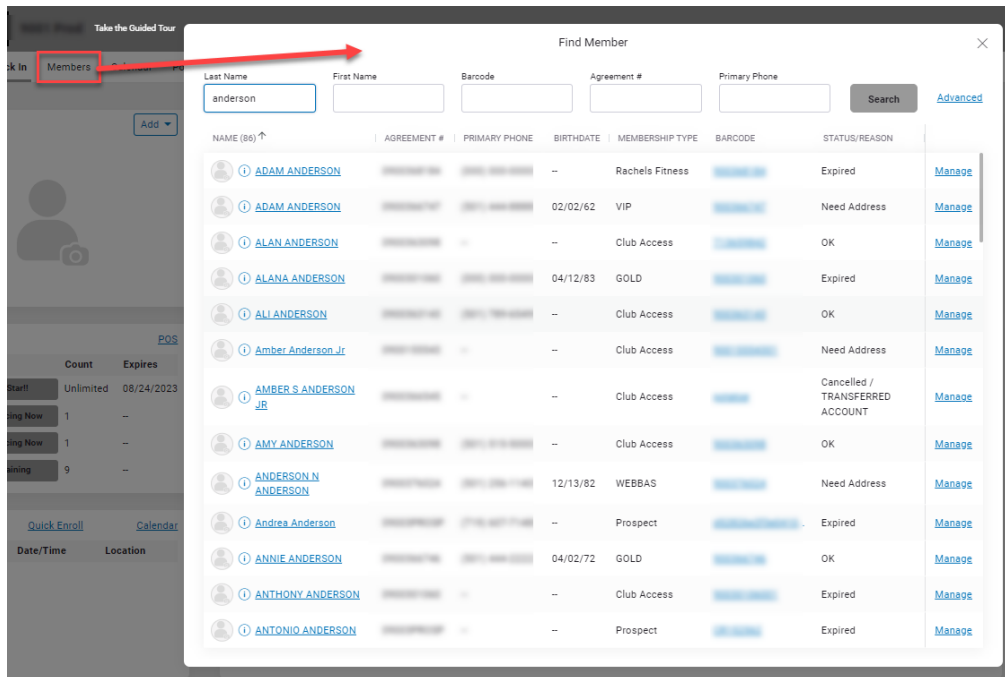
In DataTrak, the Member Search page was opened via *Menu>Members>Manage*.

In Membership and Operations, click the **Members** tab to open a Member Search.

Click the  info button to the left of a member's name to view the member summary (this replaces the yellow Info icon in DataTrak).

Click **Manage** to open the member dashboard.

Click **Advanced** to open an Advanced Member Search. This is identical to the Manage Members search in DataTrak.



Learn more about [Member Search](#).

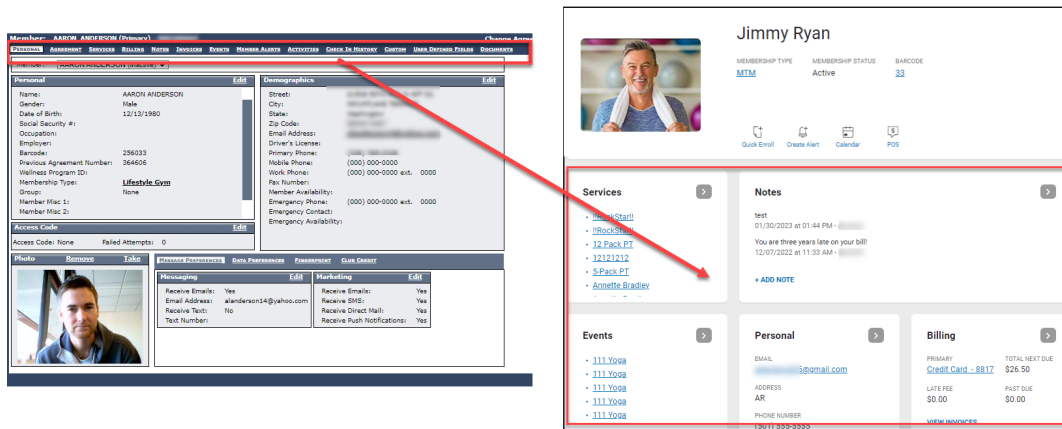
Learn more about [Advanced Member Search](#).

Member Dashboard and Details

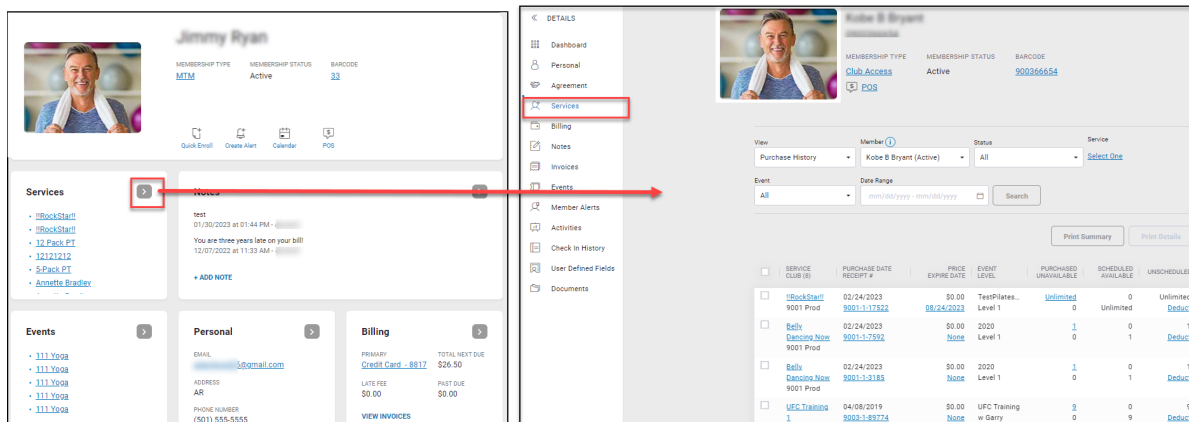
The member dashboard is a new page that provides an overview of the member, much like the Club Home page provides an overview of the club.

In DataTrak, clicking a member's name would direct you to the member page, where member information is organized into horizontal tabs at the top of the page.

In Membership and Operations, clicking a member's name (in most cases) will direct you to the member dashboard, which contains tiles that correspond to the member details tabs. You must scroll to view all the information.



Each of these tiles contains basic information, but you can click the arrow at the top-right corner of each pane to open that tab in the member details page.

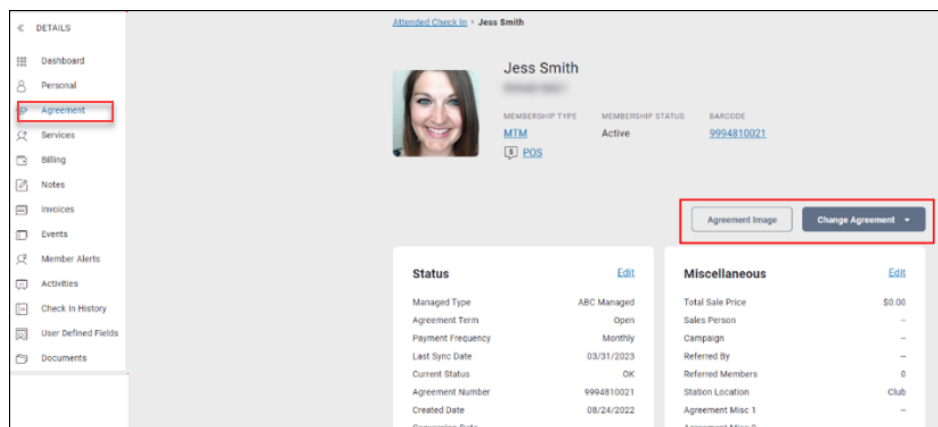


Agreement Buttons

The Change Agreement and Agreement Image buttons have moved to the Agreement tab.



Note: These buttons may be different depending on the status of the member agreement. For example, if the agreement is still in a queue, the Edit Agreement in Queue button will replace the Change Agreement button.

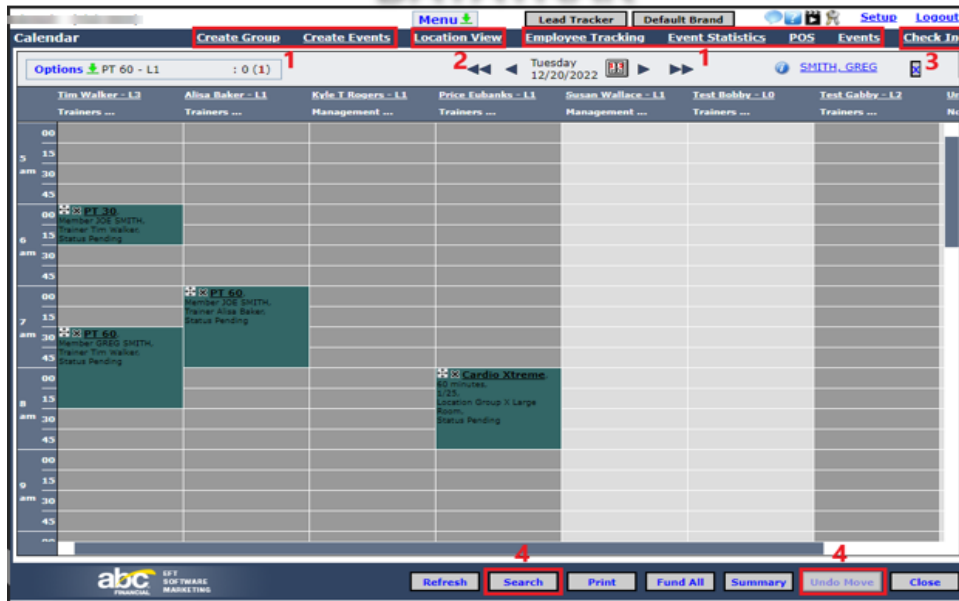


Calendar

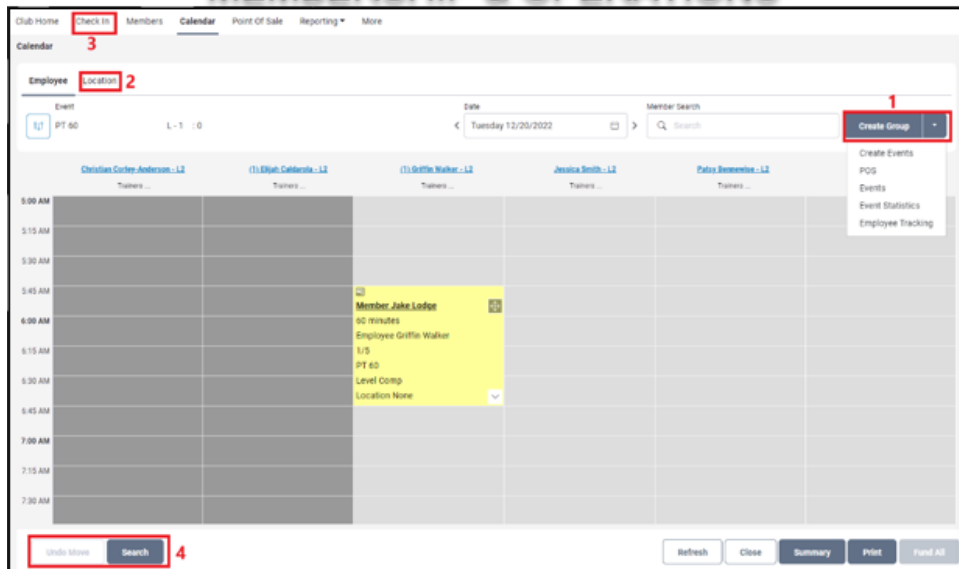
The following table and images compare the Calendar page in DataTrak to Membership and Operations.

- 1 Create Group and Create Events moved to a new drop-down menu.
- 2 Location View has been made a tab along with Employee View.
- 3 The Check In link has been replaced by the Check In link in the navigation bar.
- 4 Search and Undo Move have been moved to the bottom left corner of the page.

DATATRAK



MEMBERSHIP & OPERATIONS




The double-arrow selector button has been removed from Membership and Operations. Use the single arrow to navigate by day, or click on the date range box and a calendar will open allowing you to choose a specified date.

Learn more about the [Calendar](#).

Point of Sale

The following table and images compare the Point of Sale page in DataTrak to Membership and Operations.

1	<p>The member associated with the transaction will still display in the top-left corner. In Membership and Operations, you can click the member's name to open the member dashboard. Click the  info button to the left of a member's name to view a summary that will differ depending on the transaction.</p> <p>If a member is not displayed, click Select to choose a member.</p>
2	<p>Member details can be viewed in Membership and Operations by clicking the arrow to the right of the member's name to expand that section.</p>
3	<p>The Load Sale button has been moved to the top-right of the Sale pane.</p>
4	<p>The Invoice Discount section has moved. It can be viewed by clicking the arrow to the right of Load Previous Sale to expand that section.</p>
5	<p>The Category drop-down menu has moved to the left side of the page and was renamed Categories.</p>
6	<p>Images can now be added to point-of-sale items. To add or update the image for a POS item, navigate to <i>Settings>Inventory>Catalog Items</i>, and select the item. On the Edit Catalog Items page, click Select Image. Select the image from the gallery or upload a new image. Click OK, then click Save.</p>
7	<p>Return, Drop/Add, No Sale, and Quick Cash have been moved to the bottom left corner of the page.</p>
8	<p>Card on File has been added as a button for quick checkout.</p>
9	<p>The Clear button has been added to the top-right of the page, and replaced the Close button. Click Clear to remove <i>everything</i> from POS, including all items loaded to the cart and the transaction member.</p>
10	<p>The Options drop-down menu has been added to the top-right of the page. These options include Receipts, Calendar, Gift Card Transactions, Gift Card Balance Inquiry, and Display</p>

Group.

Learn more about:

- [Receipts](#)
- [Calendar](#)
- [Gift Card Transactions](#)
- [Gift Card Balance Inquiry](#)
- [Display Groups](#)

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The Check Out button has replaced Total.

After you click Check Out, you can select from available payment methods.

DATATRAK

The screenshot shows the DATATRAK Point of Sale interface. It includes a top navigation bar with 'Menu', 'Lead Tracker', 'Default Brand', 'Setup', and 'Logout'. The main area is divided into several sections:


- Member Information:** Member name 'GREG SMITH' (1), Agreement #, Club Account (\$240.00), Pre-Pay (\$0.00), ABC Account (Credit Card), Club Account (Credit Card), and Member Email (None).
- Inventory:** A search field for UPC (3).
- Sale:** Invoice Discount 'Premium Member (20.00%)' (4), Waive Tax (None), and Comment field.
- Product Selection:** A grid of product buttons including Backpack, Bang - berries, Bang - Black Cherry, Bang - Krylonite, Bang - Nectarine Blu, Bang - Orange, C4, Celsius Orange, Edible Cookie Dough, and TL HRB Createine (5).
- Item Table:** A table with columns: Item Name, Item Quantity, Unit Price, Extended Price, Item Discount, Waive Tax, Expiration Date, Commissions, and Pre-Tax Total. It lists Backpack and Bang - berries.
- Summary:** Extended Price: \$77.50, Discounts: \$15.50, Total: \$62.00, Tax: \$4.09, Grand Total: \$66.09.
- Bottom Bar:** Buttons for 'Total' (11), 'Quick Cash' (7), 'Return', 'Drop/Add', and 'Close' (9).

MEMBERSHIP & OPERATIONS

The screenshot shows the MEMBERSHIP & OPERATIONS Point of Sale interface. It includes a top navigation bar with 'Club Home', 'Check In', 'Members', 'Calendar', 'Point of Sale', 'Reporting', and 'More'. The main area is divided into several sections:

- Member Selection:** Member name 'GREG SMITH' (1) and a search field (2).
- Categories:** A dropdown menu for Categories (5).
- Product Grid:** A grid of product buttons including Backpack, C4 Fruit Punch, Card Fee, Cherry Gatorade, Enrollment Fee, Monthly Dues, Personal, and Personal (6).
- Cart:** A table with columns: ITEM (QTY), UNIT PRICE, EXTENDED PRICE, ITEM DISCOUNT, WAIVE TAX, EXPIRATION, COMMISSION, and PRE-TAX TOTAL. It lists Cherry Gatorade and Backpack.
- Summary:** EXTENDED PRICE: \$17.00, DISCOUNTS: \$0.00, TAX: \$0.00, TOTAL: \$17.00, GRAND TOTAL: \$17.00.
- Bottom Bar:** Buttons for 'Return', 'Drop/Add', 'No Sale', 'Quick Cash', 'Card on File' (8), and 'Check Out' (11).

Learn more about [Point of Sale](#).

 **Tip:** Point of Sale can be opened from a number of locations in Membership and Operations:

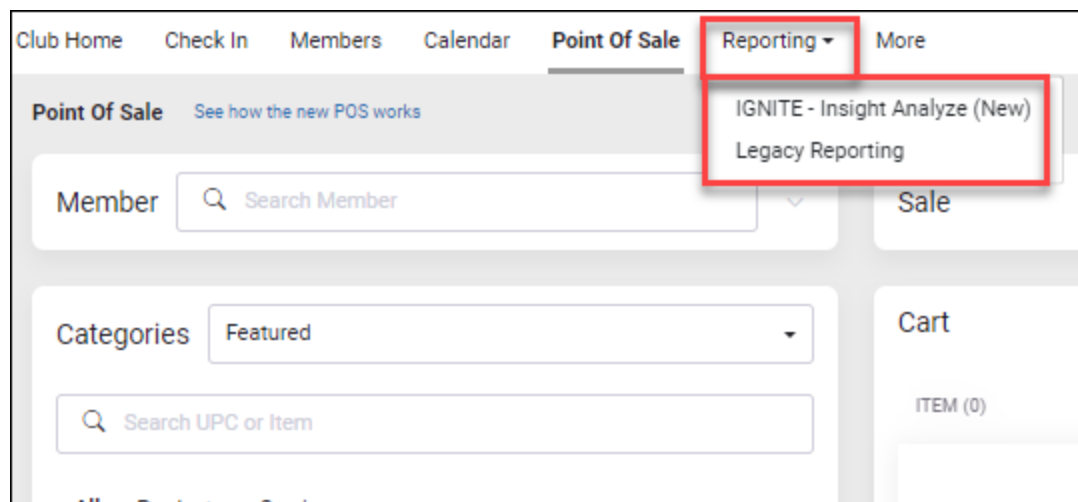
- Click Point of Sale in the navigation bar
- Click a Featured Item on Club Home
- Click the POS icon in the member profile section on Club Home
- Click POS on the Check In page
- Navigate to More>POS
- Navigate to Calendar>Create Group>POS
- Click Point of Sale on any member page

Reporting

The reporting functions that were available in DataTrak are still available, but are considered legacy content.

IGNITE Insights Analyze has replaced the Club Reporting System (CRS), and is the new source for all your reporting needs.

Click Reporting in the navigation bar to open a drop-down menu that includes IGNITE Insights Analyze and Legacy Reporting.



Learn more about [reporting](#).

More Menu

The main menu in DataTrak has been replaced by the More menu in Membership and Operations. This menu is mostly identical, with a few differences.

Click More in the navigation bar to open this menu.

The following table describes the few changes to the menu.

- 1 Check In Display has been moved. Navigate to *More>Check In>Check In Display* to open the Check In Display page where you can see all members that have checked in for the selected day. You can also print a member's check in history on this page.
- 2 A quick link has been added to IGNITE Sales. If you are using this option, navigate to *More>Members>IGNITE Sales*. If you are not using this option and would like to learn more, please contact your Customer Success Manager, or send a request for info to AMgroup@abcfitness.com.
- 3 The IGNITE Insights Analyze and Legacy Reporting links have been added to the Reports section. Learn more about [reporting](#).

The screenshot shows the 'More' menu in the IGNITE software. The menu items are organized into columns: Check In, Point of Sale, Members, Schedule, Reports, and External. Red boxes and numbers highlight specific changes: '1' points to 'Check In Display' under Check In; '2' points to 'IGNITE Sales' under Members; '3' points to 'IGNITE - Insight Analyze (New)' and 'Legacy Reporting' under Reports. Below the menu is a 'MEMBER DETAILS' window for a member with the following information:

MEMBER DETAILS		CHECK INS	REMOTE CHECK INS	OCCUPANCY
Membership Type:	Basic	Last Visit:	04/10/2023	
Barcode:	0002301085	Agreement #:	0002301085	
Notes:	None Create	Secondary Members:		
Past Due:	\$0.00	Next Due:	\$15.00	
Late Fee:	\$0.00	Service Fee:	\$0.00	
Total Next Due:	\$15.00	Total Past Due:	\$0.00	
ABC Account:	Credit Card	Club Account:	Credit Card	
Last Sync Date:	04/10/2023	Sync Flag:	Yes	
Next Due Date:	05/25/2023	Locker Number:		
Email:	dcook@test.com			