DataTrak/

Membership and Operations

Comparison

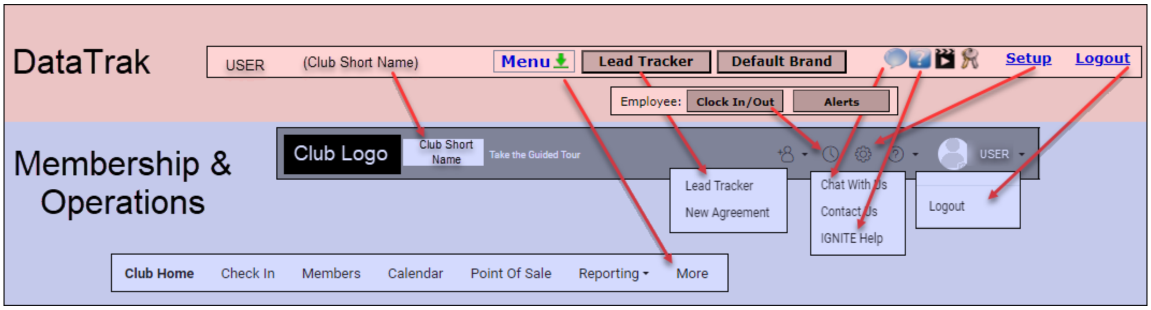
Membership and Operations Guide

DataTrak / Membership & Operations Comparison

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

Navigation

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

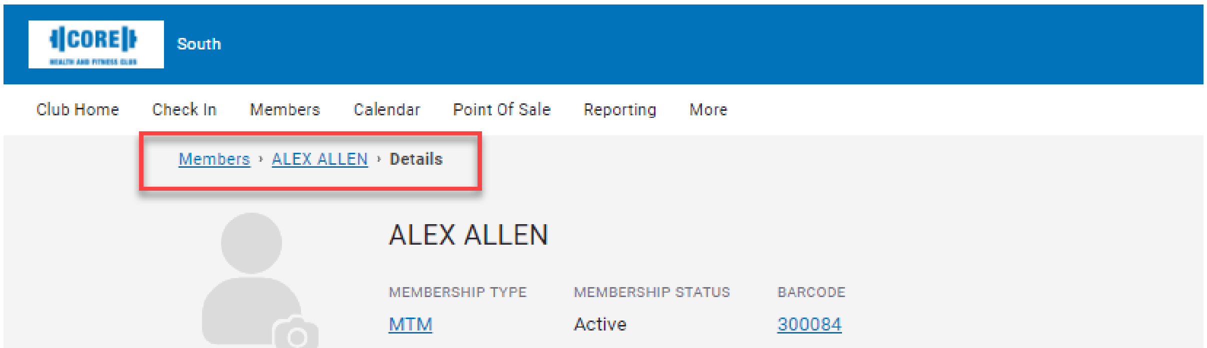


Moved Features	New Features
• The Menu moved to **More** in the navigation bar. • Setup moved to **Settings** in the toolbar. • Lead Tracker moved to **Lead Tracker** in the New Agreement drop-down menu in the toolbar. • Employee Clock In/Clock Out has moved to **Clock In/Clock Out** in the toolbar. • 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.	• 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.

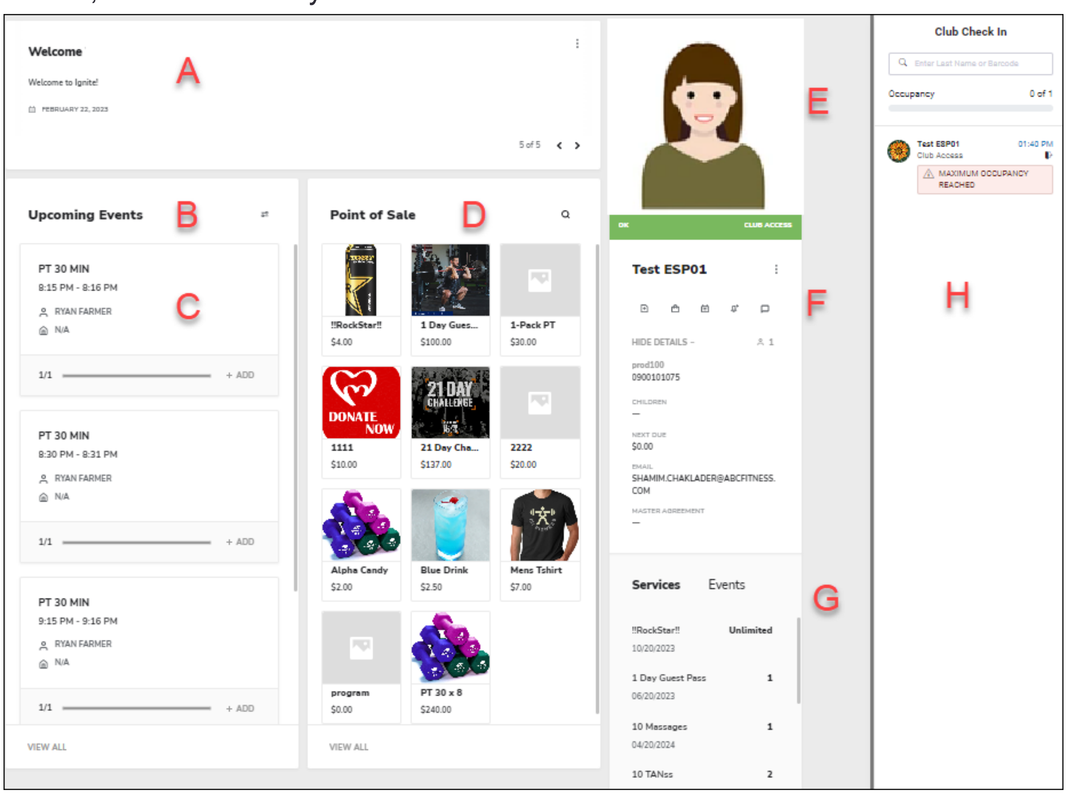
Breadcrumbs

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.

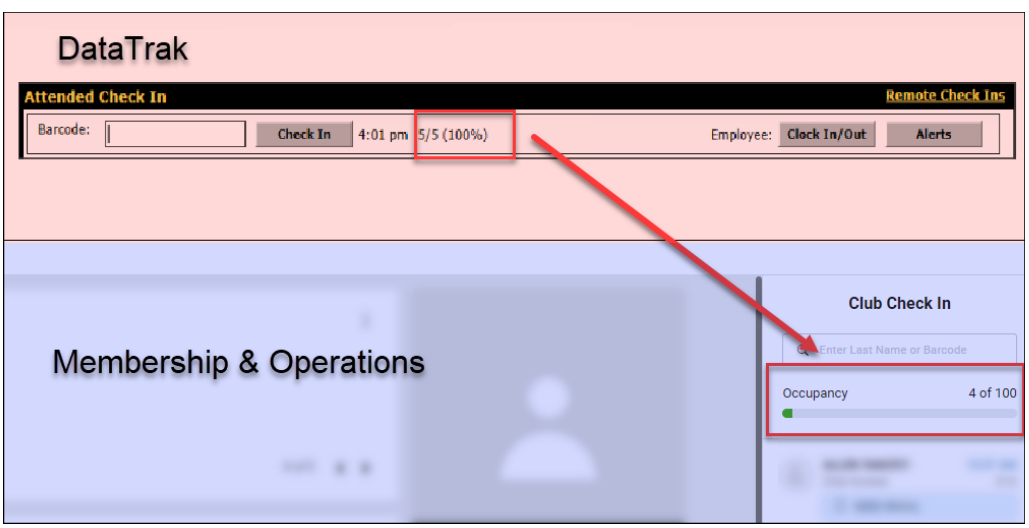


A	Club Announcements	This panel shows today's date and the announcements for the day. Announcements appear below the date on which they were created. Click the bottom right arrow to cycle through announcements. These announcements will cycle automatically every five seconds. The label "New" will appear for 24 hours after the creation of an announcement. New announcements will be displayed first. Learn more about Club Announcements.
B	Upcoming Events	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. Learn more about Upcoming Events.
C		Click an individual event to view or edit it. To view all events, scroll to the bottom of the page and click **View All**. The calendar will open.
D	Point of Sale	This panel provides easy access to frequently sold items (Featured Items). Each item tile shows the item name, image, and unit price. Learn more about Point of Sale on Club Home.
E	Member Photo	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. Learn more about Member Photo.
F	Member Profile	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. 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 *Settings>Club Home>Member Profile.*

		Summaries of the member's payment amounts, purchased services, and scheduled events are also displayed. Learn more about the member profile. Learn more about Club Home settings.
G	**Member Details**	Click **Show Details** to show the member's barcode, agreement number, and billing information. Learn more about Member Details.
H	**Club Check In Pane**	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. 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. Learn more about the Club Check In Pane.

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 *More>Check In>Remote Checkins*. The Check In Display tab has been moved to Check In Display and *More>Check In>Check In Display.*

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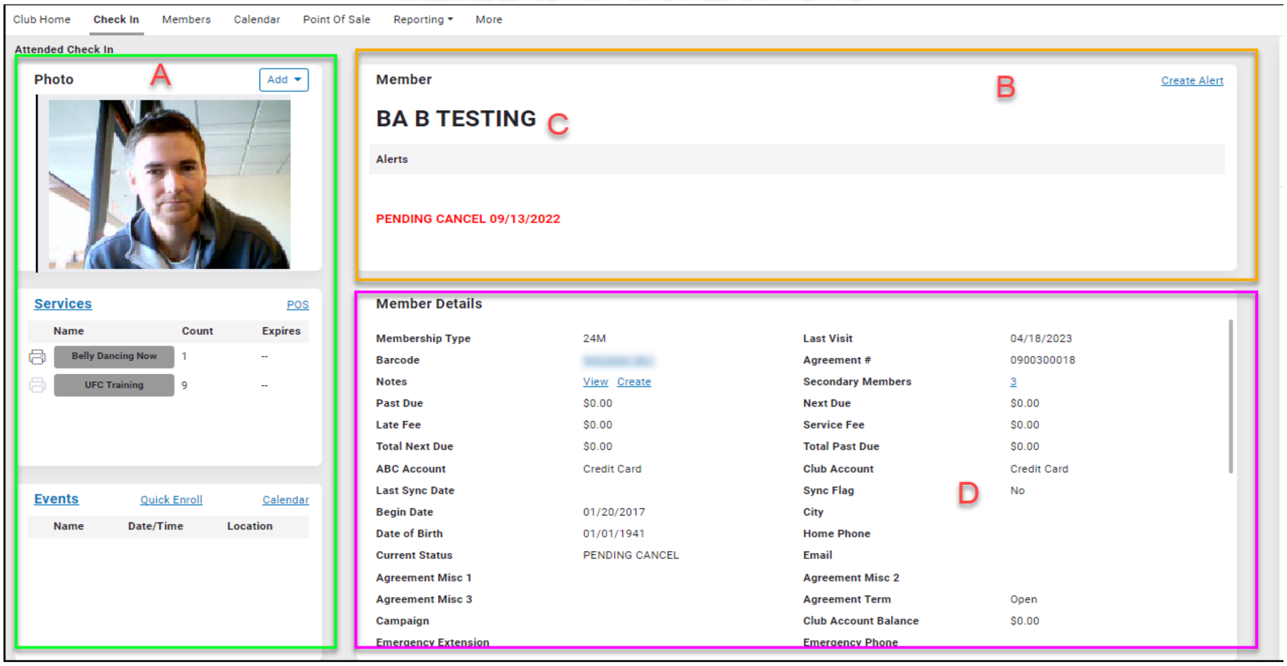

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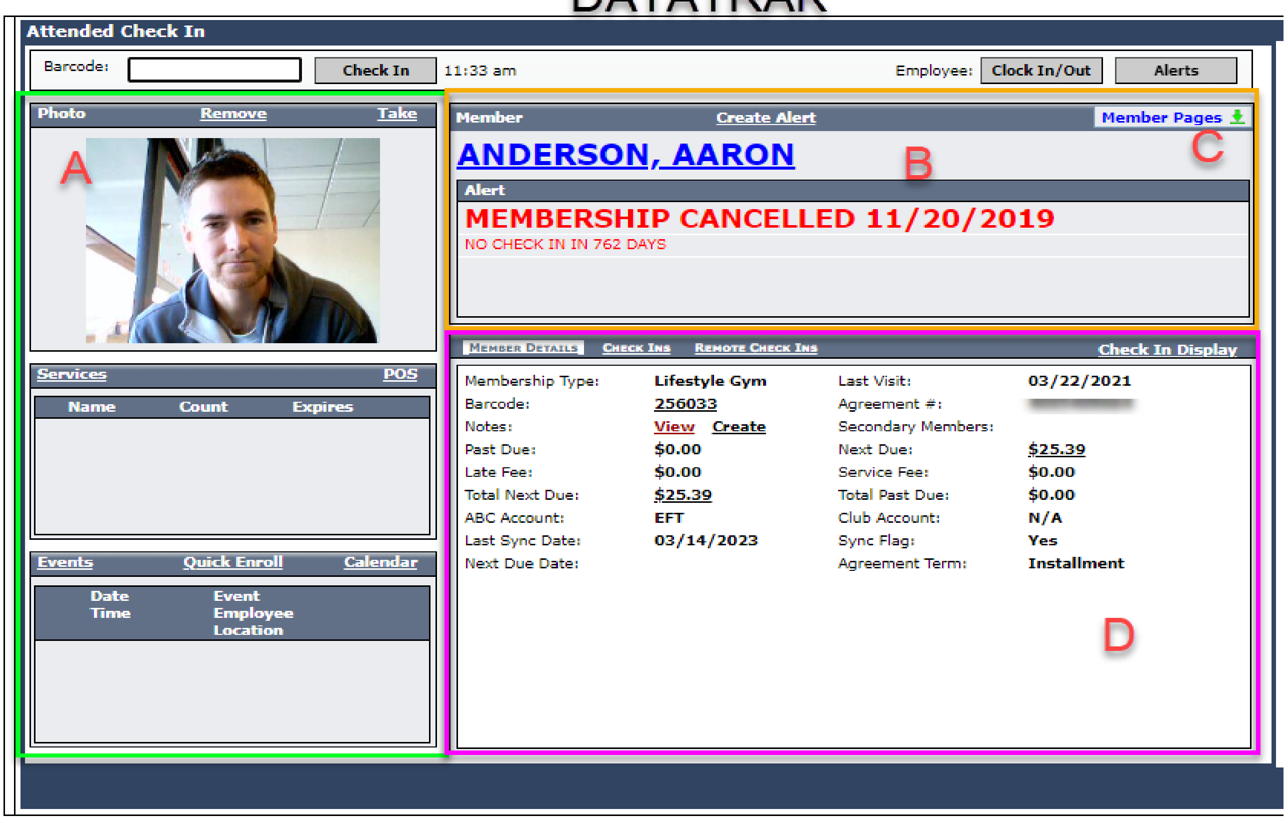


Member Search

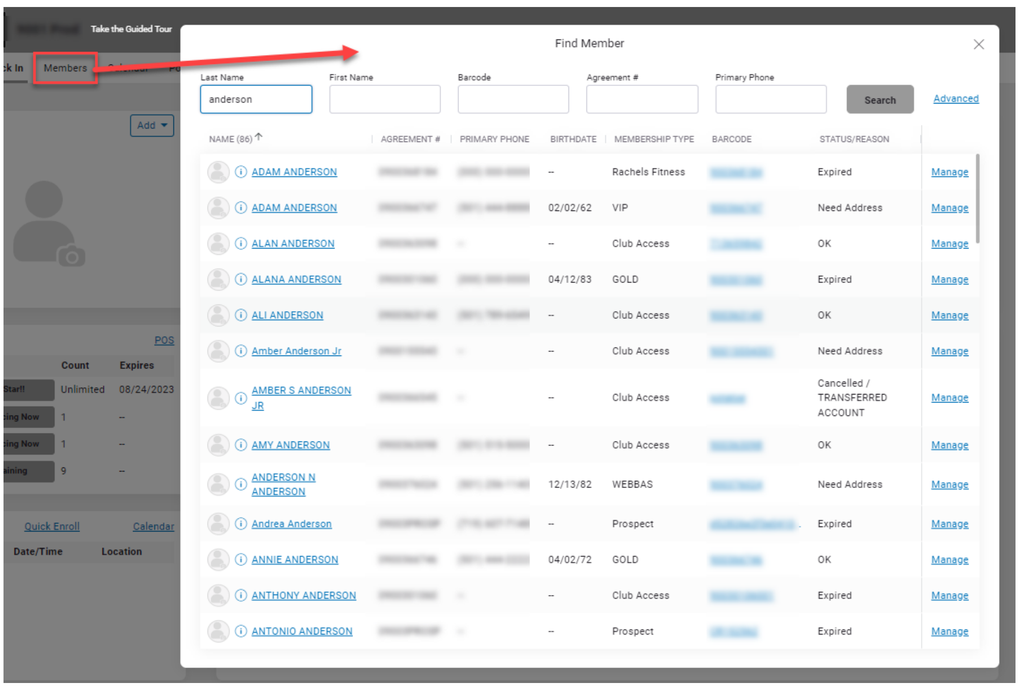
In DataTrak, the Member Search page was opened via *Menu>Members>Manage.*

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.](#)

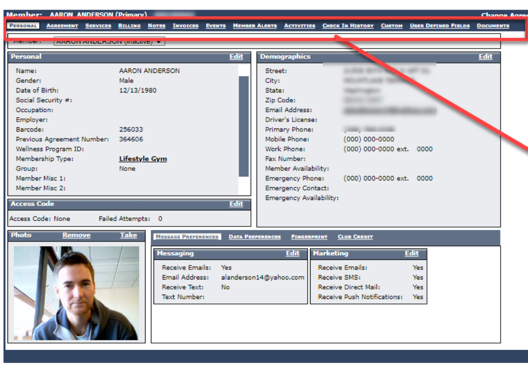
Learn more about [Advanced Member Search.](#)

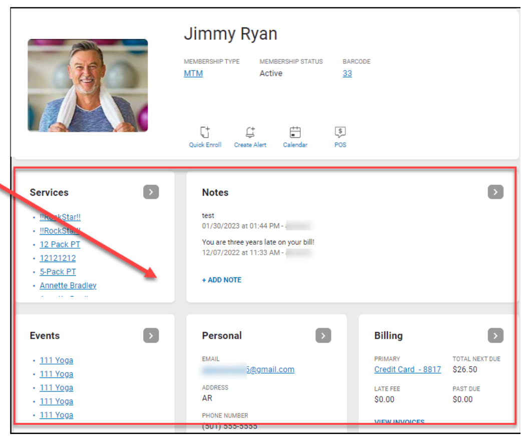
Member Dashboard and Details

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.

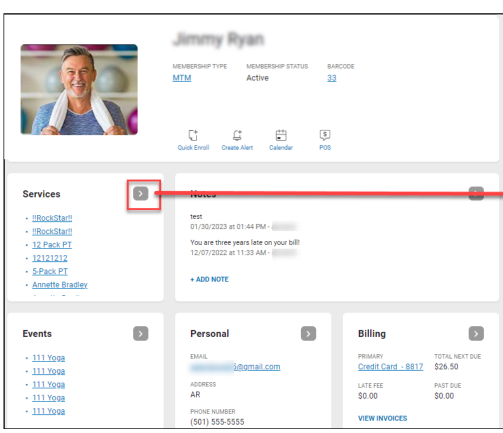
In DataTrak, clicking a member's name would direct you to the member page, where member information is organized into horizontal tabs at the top of the page.

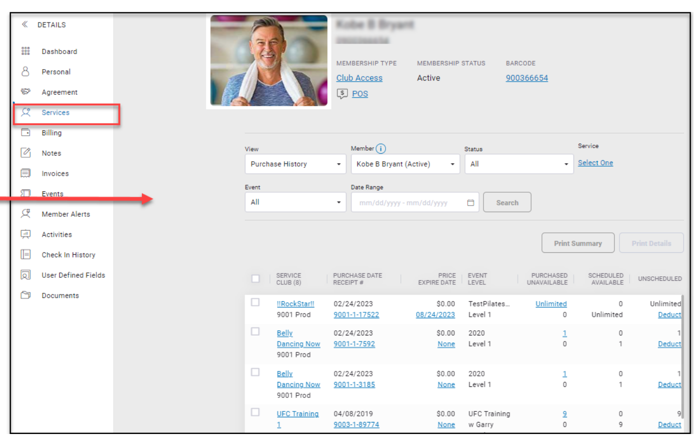
In Membership and Operations, clicking a member's name (in most cases) will direct you to the member dashboard, which contains tiles that correspond to the member details tabs. You must scroll to view all the information.





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.

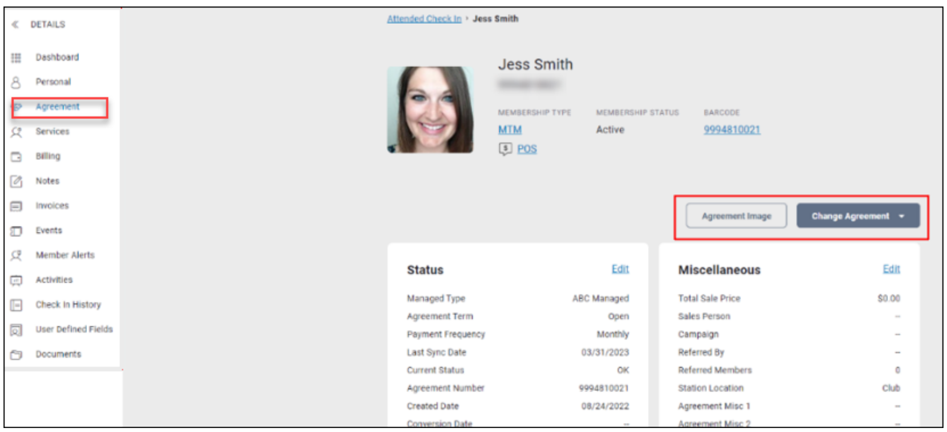




Agreement Buttons

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.

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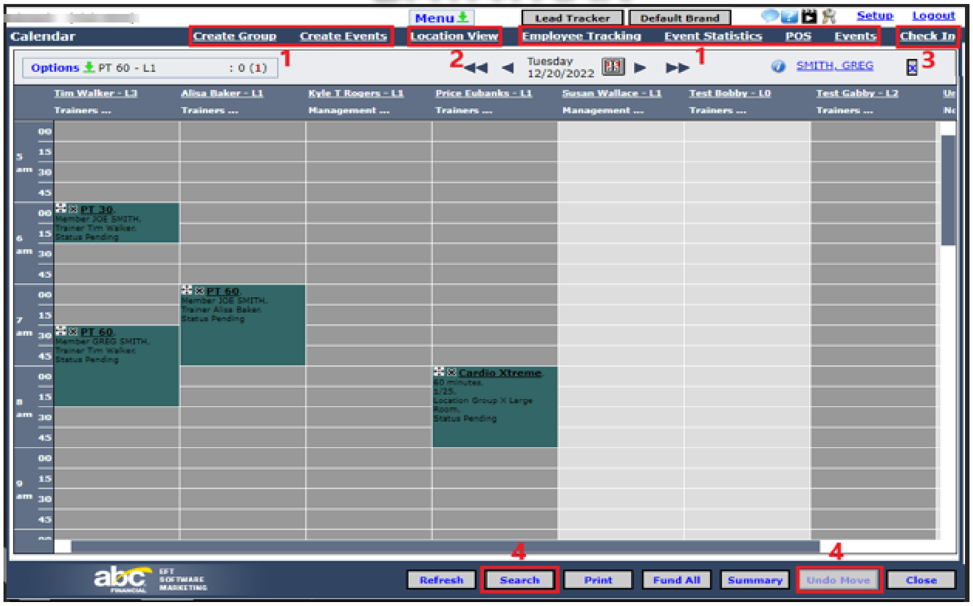

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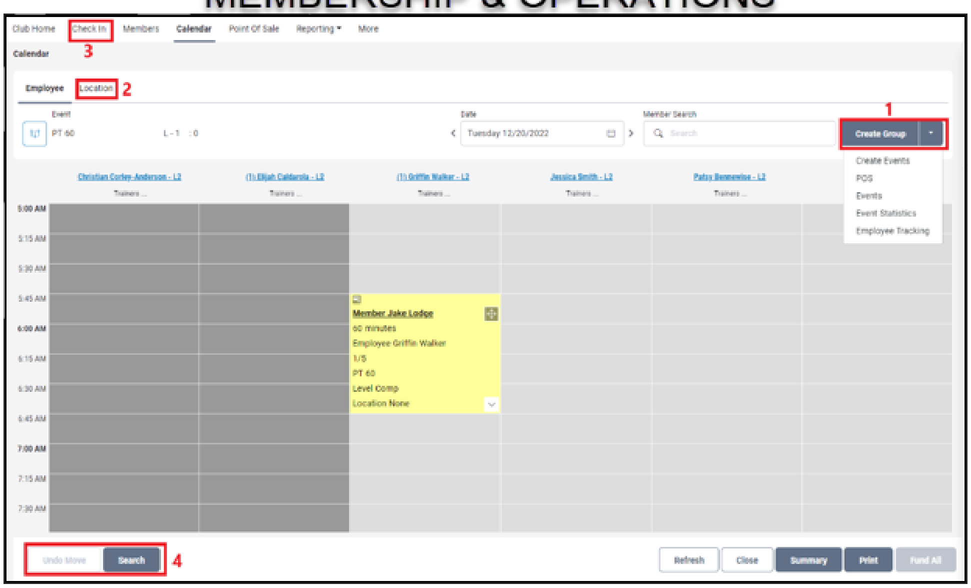


The double-arrow selector button has been removed from Membership and Operations. Use the single arrow to navigate by day, or click on the date range box and a calendar will open allowing you to choose a specified date.

Learn more about the Calendar.

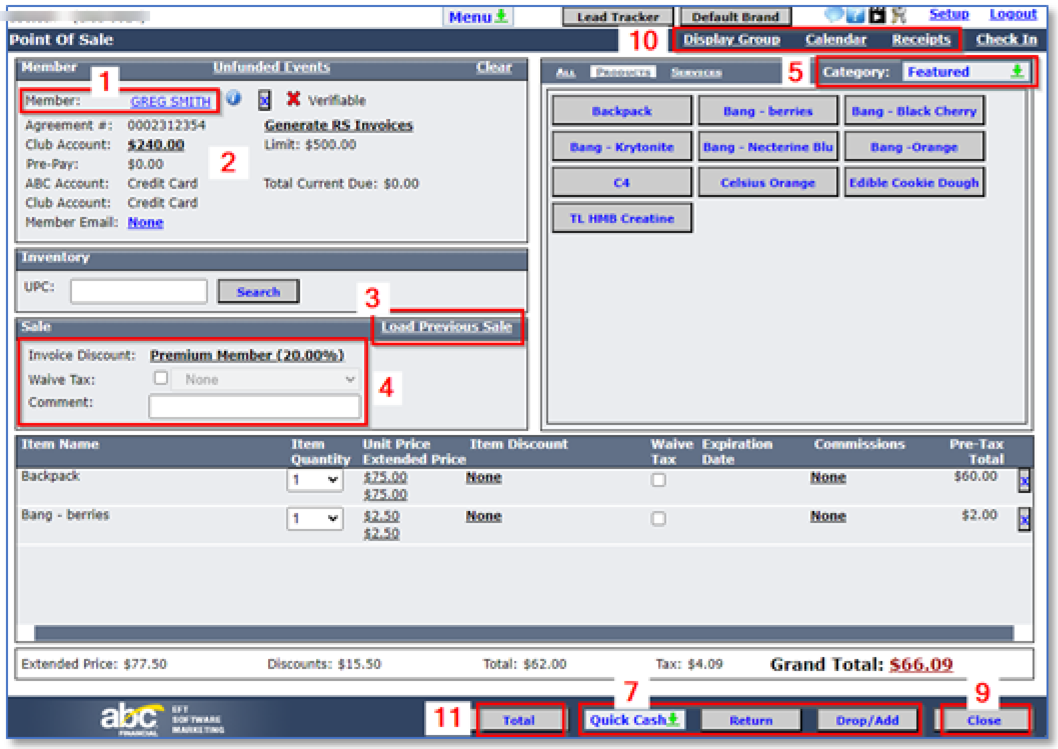
Point of Sale

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

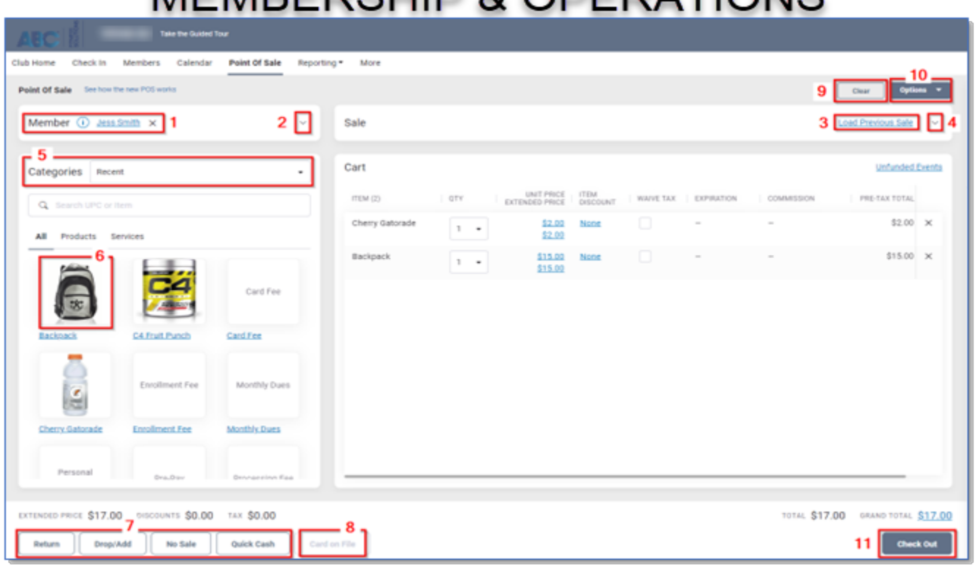
1	The member associated with the transaction will still display in the top-left corner. In Membership and Operations, you can click the member's name to open the member dashboard. Click the ⓘ info button to the left of a member's name to view a summary that will differ depending on the transaction. If a member is not displayed, click **Select** to choose a member.
2	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.
3	The Load Sale button has been moved to the top-right of the Sale pane.
4	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.
5	The Category drop-down menu has moved to the left side of the page and was renamed Categories.
6	Images can now be added to point-of-sale items. To add or update the image for a POS item, navigate to *Settings>Inventory>Catalog Items*, 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**.
7	Return, Drop/Add, No Sale, and Quick Cash have been moved to the bottom left corner of the page.
8	Card on File has been added as a button for quick checkout.
9	The Clear button has been added to the top-right of the page, and replaced the Close button. Click **Clear** to remove *everything* from POS, including all items loaded to the cart and the transaction member.
10	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

	Group. Learn more about: • Receipts • Calendar • Gift Card Transactions • Gift Card Balance Inquiry • Display Groups
11	The Check Out button has replaced Total. After you click Check Out, you can select from available payment methods.

DATATRAK



MEMBERSHIP & OPERATIONS



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

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

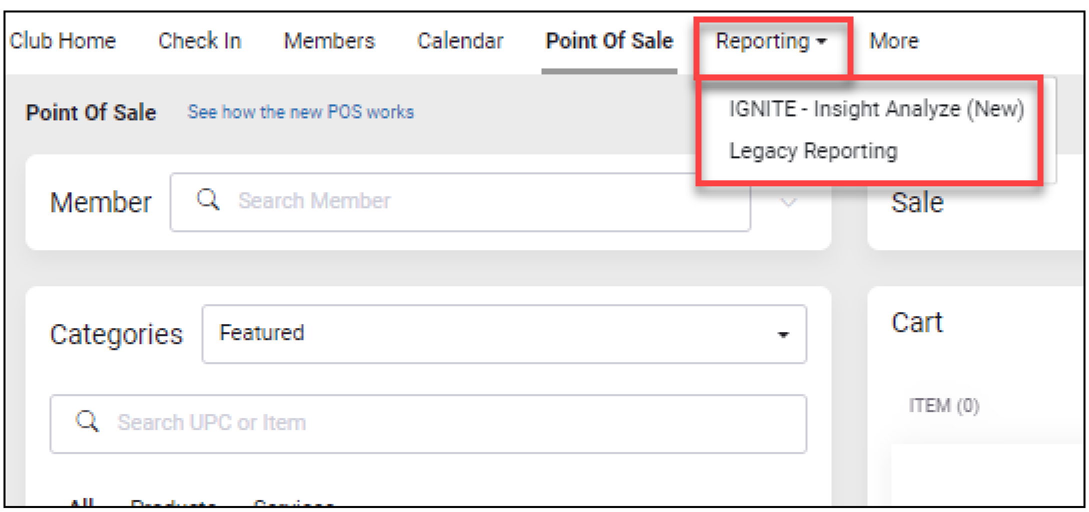
- Click Point of Sale in the navigation bar
- Click a Featured Item on Club Home
- Click the POS icon in the member profile section on Club Home
- Click POS on the Check In page
- Navigate to More>POS
- Navigate to Calendar>Create Group>POS
- Click Point of Sale on any member page

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.