



**IGNITE**

# Upgrade Configuration

---

## Membership and Operations Guide

---

# Upgrade Configuration for Membership and Operations



**Note:** The following configurations are normally performed prior to upgrade, but they can be reconfigured after upgrading.

Use the following instructions to configure these features and modules in Membership and Operations:

- [Color Scheme and Logo](#)
  - [Verify Brand and Color Scheme](#)
  - [Edit Color Scheme](#)
  - [Change Logo](#)
- [Security Roles](#)
  - [Club Home](#)
  - [Refundable Invoices](#)
- [POS Featured Items](#)
- [Configure Club Home As Default Page](#)

## Color Scheme and Logo

As was the case in DataTrak, branding allows you to apply your company logo and color scheme to the interface. If you already know what brand and color scheme are set, you can skip to Edit Color Scheme and Change Logo. Otherwise, following the steps to Verify the Brand and Color Scheme first.

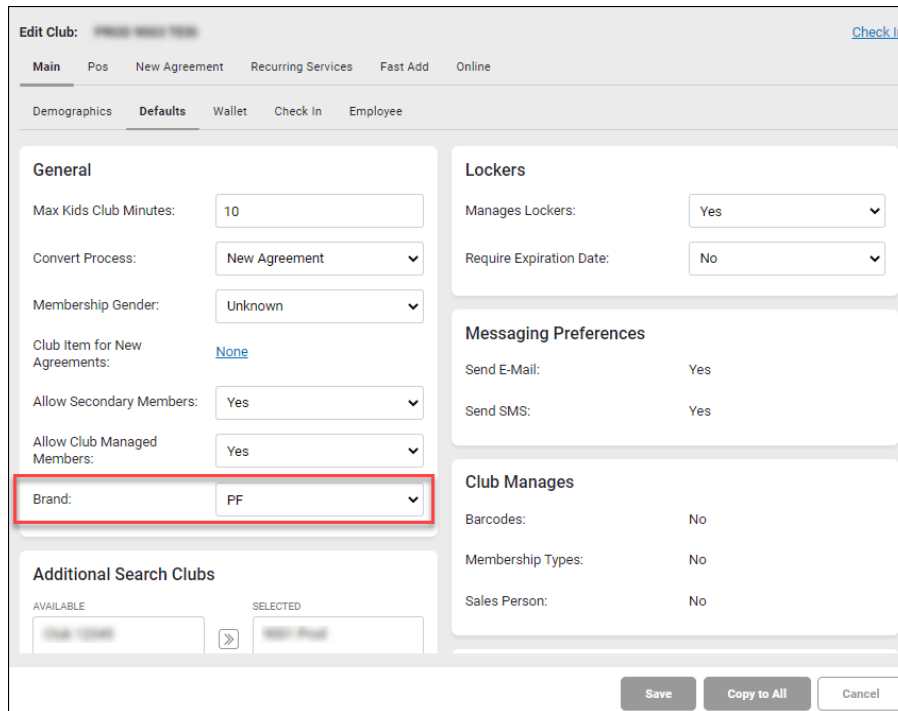
- [Verify Brand and Color Scheme](#)
- [Edit Color Scheme](#)
- [Change Logo](#)

## Verify Brand and Color Scheme

To see what brand is currently active:

1. Navigate to *Settings>Settings>Club>club>Main>Defaults*.
2. In the General section, confirm that the selected **Brand** is correct.

If you need to change it, click **Save** before you leave this page.



The screenshot shows the 'Edit Club' interface with the 'Defaults' tab selected. The 'General' section contains several settings, with the 'Brand' dropdown menu highlighted by a red box and set to 'PF'. Other settings include 'Max Kids Club Minutes' (10), 'Convert Process' (New Agreement), 'Membership Gender' (Unknown), 'Club Item for New Agreements' (None), 'Allow Secondary Members' (Yes), and 'Allow Club Managed Members' (Yes). The 'Lockers' section has 'Manages Lockers' (Yes) and 'Require Expiration Date' (No). The 'Messaging Preferences' section has 'Send E-Mail' (Yes) and 'Send SMS' (Yes). The 'Club Manages' section has 'Barcodes' (No), 'Membership Types' (No), and 'Sales Person' (No). At the bottom, there are 'Save', 'Copy to All', and 'Cancel' buttons.

To see what color scheme your brand is using:

1. Navigate to *Settings>Settings>Brands*.
2. Select the brand that you set in Club Settings.
3. In the General section, confirm that the selected **Color Scheme** is correct. You can also change the [logo](#) on this page.

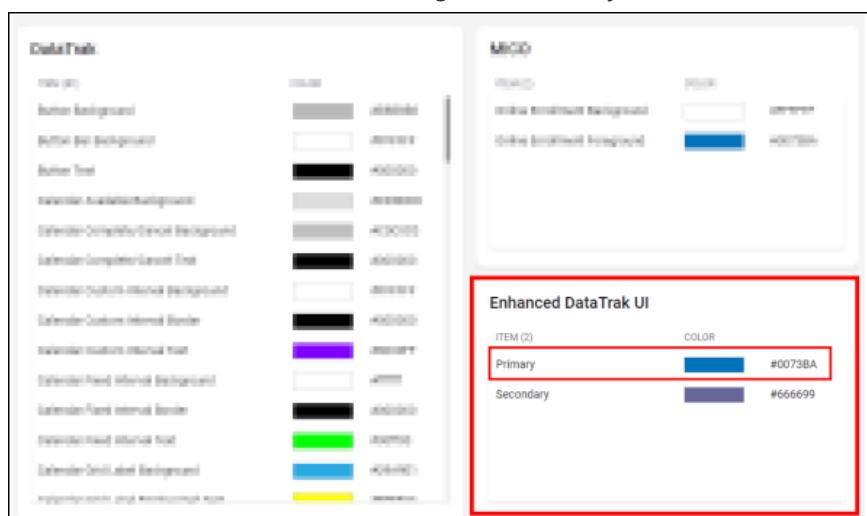
If you need to change it, click **Save** before you leave this page.

Now that you have identified the color scheme, you can locate it and change the colors of the elements in the interface.

## Edit Color Scheme

To change the color of the toolbar:

1. Navigate to *Settings>Settings>Color Schemes* and select the color scheme.
2. In the Enhanced UI section, change the Primary color.



3. Click **Save**.
4. Navigate to *Settings>Settings>Brands*.
5. Select the Brand you will be using.

6. In the General section, select the color scheme you just edited.
7. Click **Save**.
8. Navigate to *Settings>Clubs>club>Main>Defaults*.
9. In the General section, select the Brand.
10. Click **Save**.



**Note:** Your changes may not take affect until after you log out and log back into Membership and Operations.

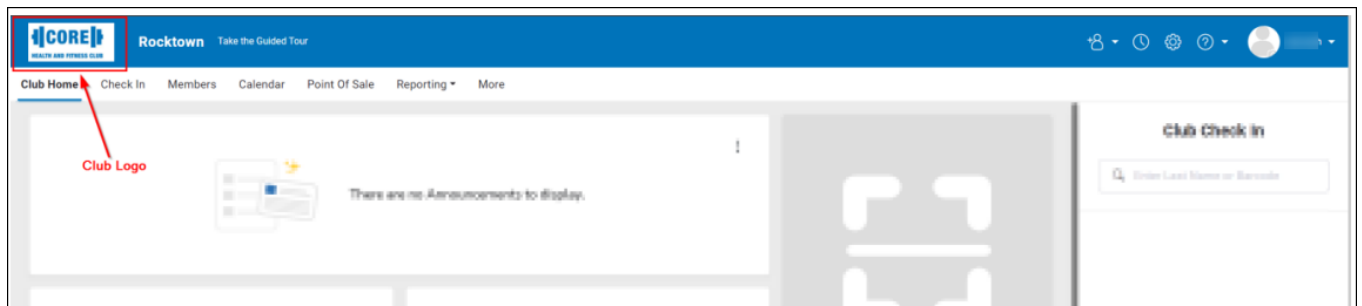


**Tip:** See [Color Schemes](#) for more information.

## Change Logo

The club logo will appear at the left of the toolbar.

To change your logo:



1. Navigate to *Settings>Settings>Brands*.
2. Click **Change** in the Logo Image section.
3. Upload the new logo image.
4. Click **Save**.
5. Navigate to *Settings>Settings>Club>club>Main>Defaults*.

6. In the General section, verify that the correct Brand is applied.
7. Click **Save**.



**Note:** Your changes may not take affect until after you log out and log back into Membership and Operations.



**Tip:** See [Branding](#) for more information.

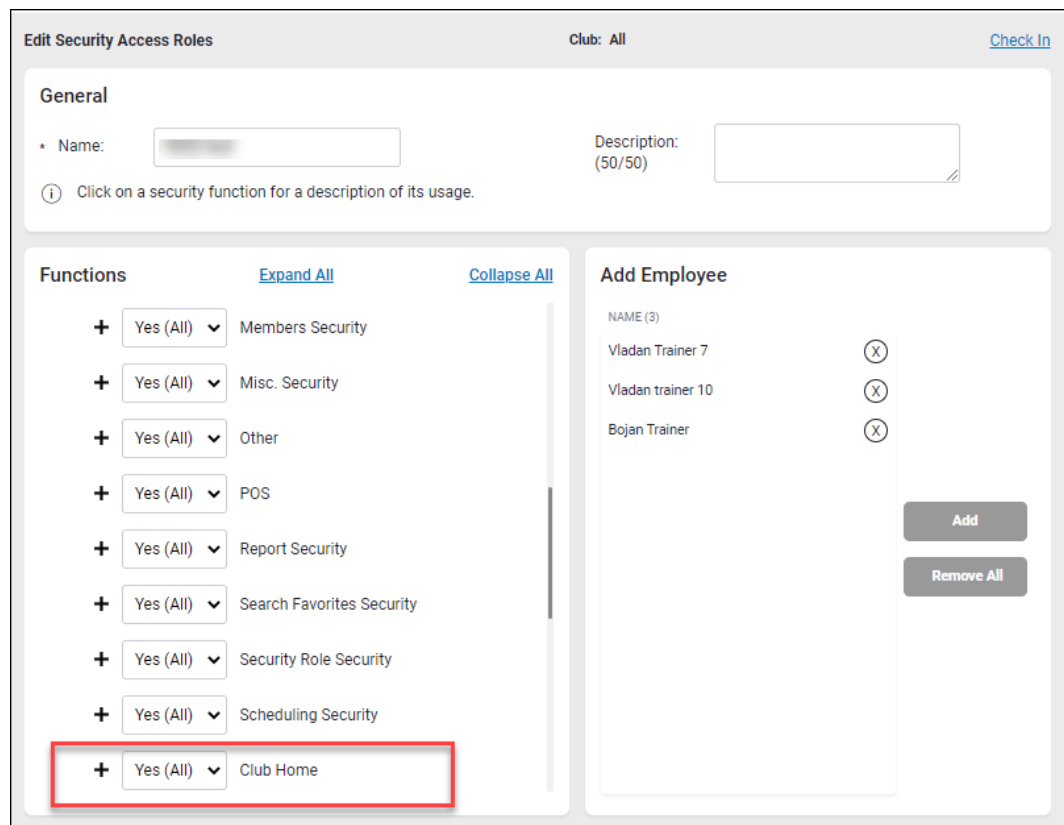
# Security Roles

New security roles have been added to restrict access to [Club Home](#) and [Refundable Invoices](#).

## Club Home Security Roles

We have added security role functions that restrict or provide access to the Club Home page.

*Settings>Employee>Security Roles>security role>Ignite>Club Home*



**Edit Security Access Roles** Club: All [Check In](#)

**General**

Name:  Description:

*Click on a security function for a description of its usage.*

**Functions** [Expand All](#) [Collapse All](#)

- + Yes (All) Members Security
- + Yes (All) Misc. Security
- + Yes (All) Other
- + Yes (All) POS
- + Yes (All) Report Security
- + Yes (All) Search Favorites Security
- + Yes (All) Security Role Security
- + Yes (All) Scheduling Security
- + Yes (All) **Club Home**

**Add Employee**

NAME (3)

- Vladan Trainer 7 (X)
- Vladan trainer 10 (X)
- Bojan Trainer (X)

**Add**

**Remove All**

These security role functions are as follows:

<b>Announcements - Manage</b>	Enable adding, editing, or deleting announcements on Club Home
<b>Club Home - Access</b>	Enable access to the Club Home Page. If a user has a security role with this function set to <b>No</b> , they will not see the Club Home page when they log in.
<b>Club Home - Edit</b>	Enable making changes to the Club Home page. (ex. widgets, page layout, etc.)

Yes (All) Club Home

Yes Announcements - Manage

Yes Club Home - Access

Yes Club Home - Edit

## Refundable Invoices

We have added a security role function that controls the refunding of invoices. It can be found in the Members Security section (*Settings>Employees>Security Roles>security role>Ignite>Members Security>Agreement Invoice Page>Refund ABC Invoices*).

A user with a security role in which this function is set to **Yes** will be able to view a member's Refundable Invoices and to refund them

(*More>Members>Manage>member>Invoices>ABC History>Refundable Invoices*).

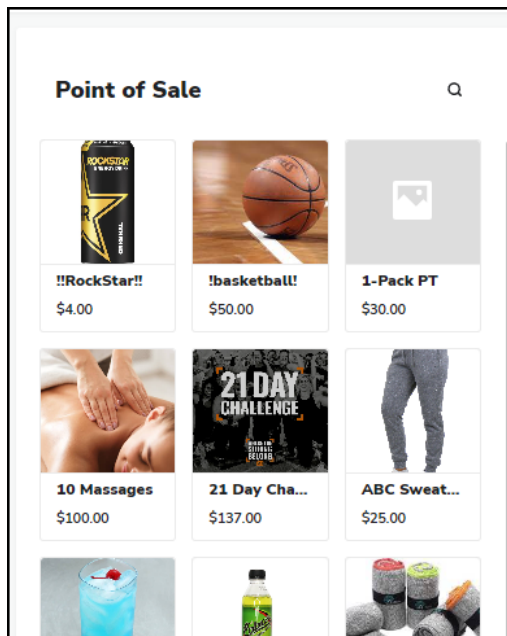
All Invoices		Refundable Invoices <span style="font-size: small;">i</span>			
TRANSACTION DATE (4)	DESCRIPTION	INVOICE AMOUNT	PAYMENT AMOUNT	REFUND	
03/15/2023	ENHANCEMAR	\$20.00		<a href="#">Refund</a>	
03/01/2023	DUES	\$35.00		<a href="#">Refund</a>	
02/01/2023	DUES	\$35.00		<a href="#">Refund</a>	
01/01/2023	DUES	\$35.00		<a href="#">Refund</a>	



## POS Featured Items

The Point of Sale panel on the Club Home page provides easy access to frequently sold items. Each item tile shows the item name, image, and unit price.

You can start a point of sale transaction by clicking an item tile. The POS module will open with the item added to be purchased, and the Find Member search will open so that you can attach a member to the sale.



**Warning!** Items will only be displayed in POS if they are set as Featured Items. To make an item featured, navigate to *Settings>Inventory>Club Items*, and select the item. On the Edit Club Items page, set **Featured Item** to **Yes** and click **Save**.



**Tip:** Alternatively, you can display a POS item category other than Featured Items. Navigate to *Settings>Settings>Workstation>Basic* and change the **Default Category** in the POS section.



**Note:** To add or update the image for a POS item, navigate to *Settings>Inventory>Catalog Items*, and select the item. On the Edit Catalog Item page, click **Select Image**. Select the image from the gallery or upload a new image. Click **OK**, then click **Save**.

## Configure Club Home As the Default Page

When your club is upgraded from DataTrak to Membership and Operations, your default page (the page that opens when you log in) will remain as it was in DataTrak.

You will have the option to change your default page to Club Home either before or after upgrading.

To change your default page to Club Home, do the following at each workstation:

1. Navigate to *Settings>Settings>Workstation>Basic*.
2. In the General section, change Default Page to **Club Home**.

**Edit Workstation**

Basic   Member Facing Event   Advanced

**General**

Station Number: 1

Company ID: [REDACTED]

Club Number: [REDACTED]

Station Name: [REDACTED]

Show In List: No

Play Alert Sound: No

Default Page: Club Home

Auto Logout: None

Enable Check In widget: Yes

POS

**Scheduling**

Default View: Location

Default Department (Calendar): Trainers

**Receipt Setup**

Receipt Printer Attached: Yes (HS) Printer Options Disabled

Number of Line Feeds: 0

Print Receipt (Quick Cash): Yes

Email Receipt (Quick Cash): No

Email Receipt (Total Default): Yes

3. Click **Save**.

The next time you log into Membership and Operations, the Default Page will open.