

Managing student memberships

If you need to check or change a student's membership, go to the student's Client Data Sheet, and click on the appropriate student's name in the top-left corner.

At the bottom of the left-hand column, click the Membership section.

Info Centre - Membership

Membership: (dropdown)
 Status: (dropdown)
 Valid From: (e.g. 16-Feb-2011)
 Valid To: (e.g. 16-Feb-2011)
 Reason For Leaving:
 All Locations:

Membership	Status	Valid From	Valid To	Location	All Locs
<input type="button" value="Edit"/>	Standard	Current	28-Mar-2022	London	Yes <input type="button" value="Delete"/>

You will be presented with the Membership page, above, where you can add and edit membership types held against the student.

It is important to note that a student must only have one membership type listed against them, or the system will not know what to charge them for services. To edit an existing membership without creating a new one, press the Edit button at the bottom of the page first which will pull all the details through to the boxes at the top of the page. Once you have pressed Edit, you can use the dropdowns to alter the membership types, ensure you press Store once complete.

Info Centre - Membership

Membership: (dropdown menu open)
 Status:
 Valid From: (e.g. 16-Feb-2011)
 Valid To: (e.g. 16-Feb-2011)
 Reason For Leaving:
 All Locations:

Membership	Status	Valid From	Valid To	Location	All Locs
<input type="button" value="Edit"/>	Standard	Current	28-Mar-2022	London	Yes <input type="button" value="Delete"/>

Please note that changing the membership type will not alter prices on any existing invoices. Whatever membership type the client has when they were originally booked onto the course is how they will be charged. If you want to change the fee that they are going to be charged, you will need to remove them from the course and book them back on again.