



Using Web Agreement Entry

November 11, 2011

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About Agreement Entry

You can complete and submit member agreements online using the web agreement entry tool in ABC's Online Business Center.

The web agreement entry tool contains the following forms:

- [Agreement Information](#) – collects basic information required for all agreements.
- [Personal Information](#) – collects information about the primary account holder for the agreement.
- [Annual Club Fees](#) – lists charges that a club may wish to add to a member's contract.
Note: If your club charges an Annual Club Fee, this fee may already be set up for your club and you will not be required to complete the Annual Club Fees form.
- [Payment Information](#) – specifies the method of payment and the interval at which the account will be billed.
- [Invoice Schedule\(s\) Information](#) – sets up each of the payment schedules included on the agreement.
Note: The Invoice Schedule(s) Information form is only required if you chose an Account Type of **Installment** or **Open-End**.
- [Renewal Information](#) – specifies the type of renewal.
- [Secondary Member\(s\)](#) – collects information about secondary members.

Required fields are marked with a red arrow ▶. You must complete all required fields before you can save that form and move on to the next one.

Creating or Changing an Agreement

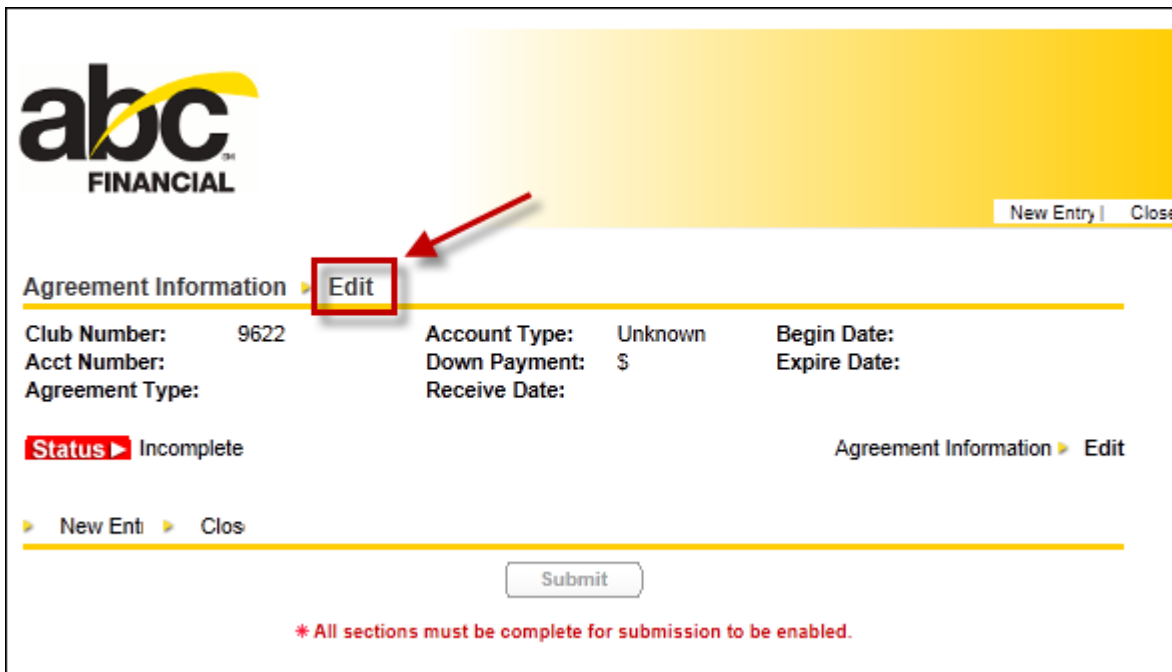
Use the following procedures to create a new agreement or change an existing agreement.

To create or change an agreement

1. In the left sidebar menu, click **Agreement Entry**.



2. When the **Agreement Information** page appears, click **Edit**.



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New Entry | Close

Agreement Information ▶ **Edit**

Club Number:	9622	Account Type:	Unknown	Begin Date:
Acct Number:		Down Payment:	\$	Expire Date:
Agreement Type:		Receive Date:		

Status ▶ Incomplete Agreement Information ▶ Edit

▶ New Ent ▶ Clos

Submit

* All sections must be complete for submission to be enabled.

3. Complete and save all applicable forms, beginning with [Agreement Information](#).
4. When finished completing all sections, [submit the form](#).

Agreement Information

Use this form to provide basic information about the agreement.

Note: The options you select on this form will determine which of the remaining forms must be completed.

To provide agreement information

1. Select an **Agreement Type**:

- o **New Agreement** – an agreement that has not previously been entered.
- o **Rewrite Existing** – an existing agreement that is rewritten using the same agreement number. It overrides any previously-entered information. Any unpaid invoices will be forgiven.

This option can only be used on **active** or **cancelled** accounts.

- o **Renew Existing** – an existing agreement that is renewed using the same agreement number. It is a continuation of the original agreement. Any unpaid invoices will become due.

This option can only be used on **expired** accounts within the past 18 months.

2. Select an **Account Type**:

- o **Cash** – an agreement that is paid in full with a one-time payment.
- o **Cash Open-End** – an agreement that is paid in full with no predetermined expiration date.
- o **Installment** – an agreement that has a specific number of payments and a specific billing cycle as well as a predetermined expiration date.

This may or may not renew.

- o **Open-End** – an agreement that has a well-defined invoice schedule with no predetermined expiration date.

3. Type an **Agreement Number**.

Note: For new agreements if you leave this field blank, the system will assign an agreement number.

4. Type a **Begin Date** or click the calendar button  and select a begin date.

5. Type an **Expire Date** or click the calendar button  and select an expiration date.

6. Type the amount of the **Down Payment**.

7. Type the **Salesperson's** number.

8. Click **Save**.

Personal Information

Use this form to provide information about the primary account holder for this agreement.

To provide personal information

1. On the **Personal Information** form, click **Edit**.
2. Complete all applicable fields for the primary account holder.
3. Click **Save**.

Annual Club Fees

Use the annual club fees form to enter any charges that your club may wish to put on the member's contract.



To set up annual fees

1. On the **Annual Club Fees** form, click **Edit**.
2. Click the **Apply** check box to activate club fees, or clear the check box to inactivate club fees.
3. If a particular fee is collected **Annually**, click the appropriate check box.
4. For all fees that apply, type the **Amount** of the payment and enter the **Date** it will be due.
5. When finished, click **Save**.

The following is an example of a completed **Annual Club Fees** form.

Annual Club Fees Form [?](#)

* Check/Uncheck 'Apply' to activate/inactivate club fees. ▶ indicates a required field

Apply:	Annually:	Profit Center:	Amount:	Date: (mm/dd/yy)
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Enhance	\$ ▶25.00	▶07/01/11 
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Maintenance	\$ ▶50.00	▶05/18/11 

[▶ Return to Summary](#)

Payment Information

Use this form to collect payment information.

To collect payment information

1. On the **Payment Information Form**, click **Edit**.
2. Select a **Payment Mode** – the method of payment that will be used to make payments on the account:
 - o **Bank Draft** – the funds are drafted from a bank account (checking or savings).
 - o **Coupon** – the funds are not drafted; the member could be issued a statement if the club participates in this option.
 - o **Amex** – the funds are drafted from an American Express charge card.
 - o **Discover** – the funds are drafted from a Discover charge card.
 - o **Mastercard** – the funds are drafted from a MasterCard charge card.
 - o **Visa** – the funds are drafted from a Visa charge card.
3. Select a **Frequency** – the interval at which drafts are made on the account:
 - o **Monthly**
 - o **Yearly**
 - o **Semi-Annual** (twice per year)
 - o **Quarterly** (every three months)
 - o **Bi-Weekly** (every two weeks)
 - o **Weekly**
4. Depending on which payment mode you selected, you may have to complete additional information such as **Credit Card Information** or **Banking Information**.
Important! Be sure to type the name exactly as it appears on the billing instrument.
5. When finished, click **Save**.

Invoice Schedule(s) Information

If you chose an account type of **Installment** or **Open-End**, use this form to set up each of the invoice schedules included on the agreement.

Note: You can enter up to seven (7) invoice schedules. The first invoice schedule is number zero (0) and the last is number six (6).

To set up an invoice schedule

1. On the **Invoice Schedule(s) Information** form, click **Edit**.
2. For the first invoice schedule, select **Primary Invoice Schedule** from the **Primary/Additional** list.
3. Select a **Profit Center**.
The profit center describes the purpose for which the monies are drafted. (For example, select the **Dues** profit center for the monthly membership fee.)
4. Type a **1st Due Date**.
This is the date on which the first payment will be due.
5. Type a **Due Day**.
This is the date each subsequent payment will be due.
6. Type the number of payments.
This is the total number of payments made during the life of this membership. (For example, if a one-year membership will be paid on a monthly basis, type 12 in this field.)
7. Type the **Coupon Amount**.
This is the amount the member is responsible for if he or she elects not to provide a credit card, checking, or savings account number. The coupon amount will be equal to or greater than the draft amount.
8. Type the **Draft Amount**.
This is the amount that will be drafted for each scheduled payment.
9. Click **Save**.
The following message will appear at the top of the form:
The invoice schedule has been set for this entry submission.
10. To enter another invoice schedule:
 - o Select an additional invoice schedule from the list. For example, for the first additional invoice schedule select **Additional Schedule (1)**, for the second additional invoice schedule select **Additional Schedule (2)**, and so on.
 - o Enter all of the information for the additional invoice schedule.
 - o Click **Save**.
 - o Repeat step 10 until all desired invoice schedules have been entered.
11. When finished, click **Return to Summary**.

Renewal Information

Use this form to specify the type of renewal.

To set up renewal information

1. On the **Renewal Information** form, click **Edit**.
2. Select the **Renewal Type**:
 - o **Non-Renewal Agreement** – an agreement that will come to an end on the expiration date.
 - o **Renewal Statement Program** – a renewal statement will be sent out with the information you have provided.

You must be set up with our renewal statement program through our Club Marketing for this option.
 - o **Auto-Renew to Term** – a contract in which the member agrees to make a certain number of consecutive payments and to allow the contract to continue for another one-year term.
 - o **Auto-Renew to Open** – a contract in which the member agrees to make a certain number of consecutive payments and to allow the contract to continue on a month-to-month basis.
3. If you selected Renewal Statement Program, Auto-Renew to Term, or Auto-Renew to Open, complete all applicable fields:
 - o Select a **Renewal Date**.
 - o Enter a **Due Day**.
 - o Enter the number of payments.

This option is disabled for Auto-Renew to Open.
 - o Select a **Frequency**.
 - o Type the **Coupon** amount.
 - o Type the **Draft** amount.
 - o Type the **Cash** amount.

This option is disabled for Auto-Renew to Open.
4. **Click Save**.

Secondary Member(s)

Use this form to add secondary members to the agreement.

To add secondary members

1. On the **Secondary Member(s)** form, click **Edit**.
2. For the first secondary member, select **Secondary Member(1)** from the **Number** list.
3. Enter all applicable information about that secondary member.
4. Click **Save**.

The following message will appear at the top of the form:

The invoice schedule has been set for this entry submission.

5. To enter additional secondary members:
 - o Select an additional member number from the list. For example, for the second secondary member select **Secondary Member(2)**, for the third secondary member select **Secondary Member(3)**, and so on.
 - o Enter all of the information for that secondary member.
 - o Click **Save**.
 - o Repeat step 5 until all desired secondary members have been entered.
6. When finished, click **Return to Summary**.

Submitting the Form

Once all of the applicable forms are completed, the **Submit** button will be enabled.

To submit the form

1. Click **Submit**.
 - o If the **submission failed**, an error message will appear as shown in the following example. Click **Continue** to return to the form and correct the issue.



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Agreement Submission Status

**Your Agreement Submission was Unsuccessful.
This client does not allow auto-renewals.**

Click continue to return to agreement entry.

Continue

- o If the **submission was successful**, a message will appear as shown in the following example.



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Agreement Submission Status

Your Agreement Submission was Successful

Click continue to return to agreement entry.

Continue

2. To return to the agreement entry form, click **Continue**.