

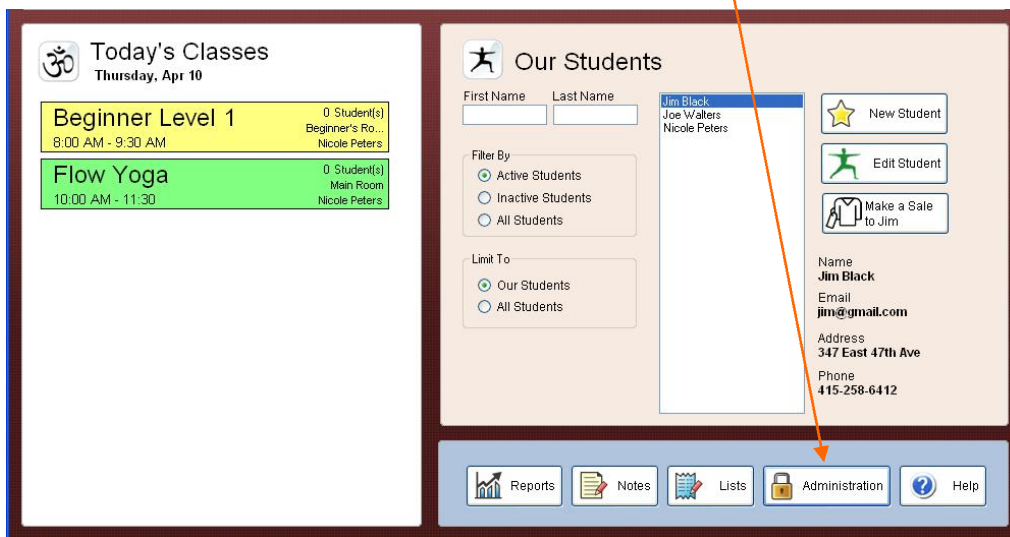
Tutorial 2: Managing Memberships, Pass Cards & Class Types

This tutorial explains how to set up memberships and passcards.

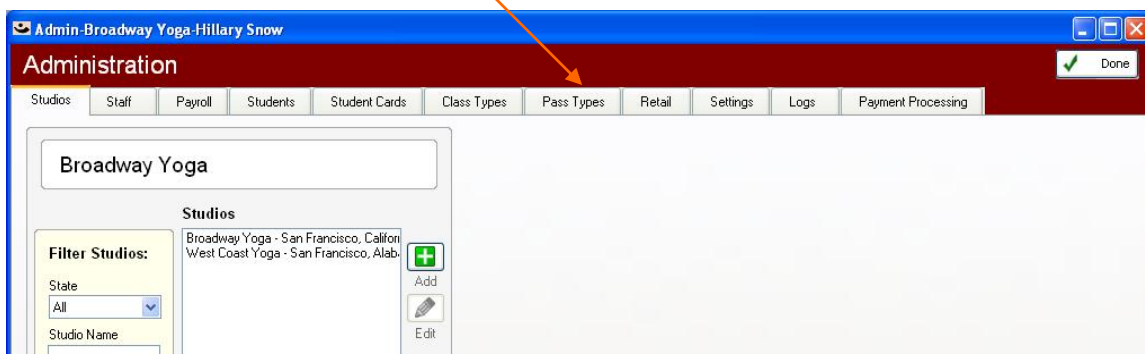
Part 1: Creating Memberships and Pass Cards

Step 1: Getting to the Pass Types tab

1. From the main PranaStudio screen, click on “Administration.”



2. After clicking on the “Administration” button, the Administration screen will open. Then click on the *Pass Types* tab. From the *Pass Types* screen, you can “Add”, “Edit” or “Delete” Pass Types.



Step 2: Adding Pass Types

1. To Add a Pass Type, click the “Add” button.

2. Enter the *Pass Name* you would like to use.

3. In the *Pass Type* drop-down menu, choose *Pass Card* for a limited Number of Classes or *Membership* for an unlimited Number of Uses. (When Membership is chosen, there will be no Number of Uses available.)

4. Enter any desired description.

5. For *Active Mode* select either *On Sale* (pass begins on the date purchased) or *On First Use* (pass begins when first used).

6. Choose the *Number of Uses* and *Valid For* which corresponds to the length of time you want this pass to be valid for (required).

7. Enter the Price. Click Tax 1, Tax 2 or Price Includes Tax¹. The Total Price will be calculated automatically.

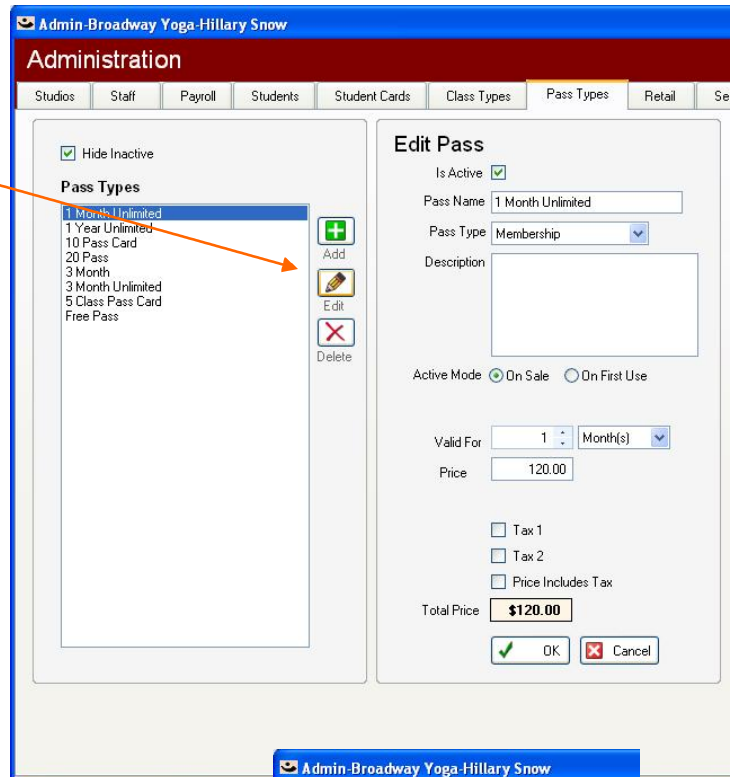
8. Click the “OK” button.

The screenshot shows the 'Add Pass' form in the 'Administration' section of the software. The form is titled 'Add Pass' and is part of the 'Pass Types' management interface. It includes a 'Pass Types' list on the left with options like '1 Month Unlimited', '1 Year Unlimited', '10 Pass Card', '20 Pass', '3 Month Unlimited', and 'Free Pass'. The 'Add Pass' form on the right has fields for 'Is Active' (checked), 'Pass Name', 'Pass Type' (set to 'Pass Card'), 'Description', 'Active Mode' (radio buttons for 'On Sale' and 'On First Use'), 'Number of Uses' (set to 0), 'Valid For' (set to 1 Month(s)), 'Price' (set to 0.00), and checkboxes for 'Tax 1', 'Tax 2', and 'Price Includes Tax'. The 'Total Price' is displayed as '\$0.00'. There are 'OK' and 'Cancel' buttons at the bottom right. Orange arrows point from the numbered instructions to the corresponding fields in the form.

¹ See Tutorial 1 for details on how to use the Tax settings.

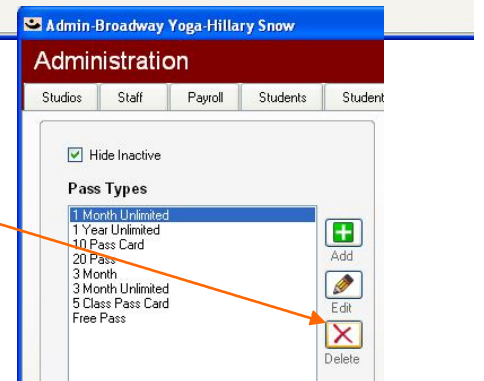
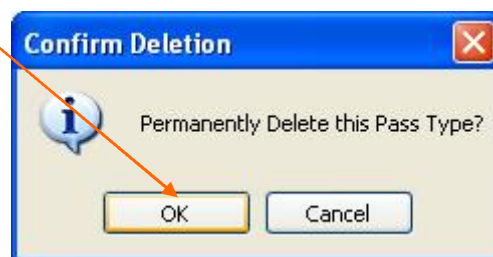
Step 3: Editing Pass Types

1. From the *Pass Types* screen, you can “Add”, “Edit” or “Delete” Pass Types. To edit a Pass Type, click the Edit button.
2. To activate the account, check the *Is Active* box
3. All the boxes may be edited. Total Price is automatically calculated from the information in the Price, Tax 1, Tax 2 and Price Includes Tax boxes.
4. To Save, click the “OK” button.



Step 4: Deleting Pass Types

1. From the *Pass Types* screen, you can “Delete” Pass Types. To delete a Pass Type, click the “Delete” button.
2. In the Confirm Deletion window click “OK.”



Passes can not be deleted if they have ever been used for a sale, and PranaStudio will remind you of this if you forget. If you are no longer using a pass type, simply set it to inactive.

Part 2: Linking Passes to Class Types

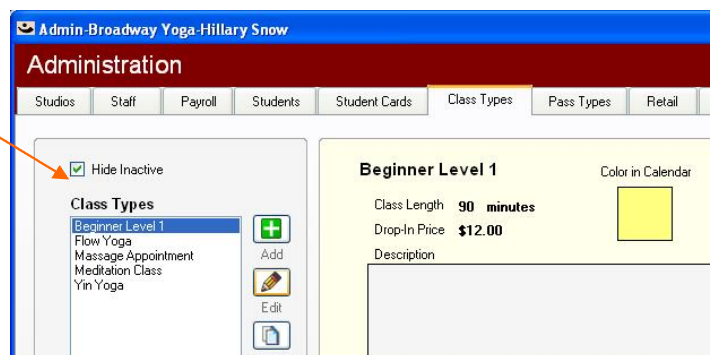
You can limit any *Class Type* to only certain passcards and/or memberships. For example, if you have special classes held on Friday for a 6 week sequence, you can set up a Friday 6 week passcard with 6 classes, and then only allow people to use that passcard to get into those classes.

To configure this, click on *Class Types* (under “Administration”) and edit the class types to fit your needs (see the following step).

Be aware that once you limit a *Class Type* to particular passes, creating new passes will by default NOT be valid for that class type.

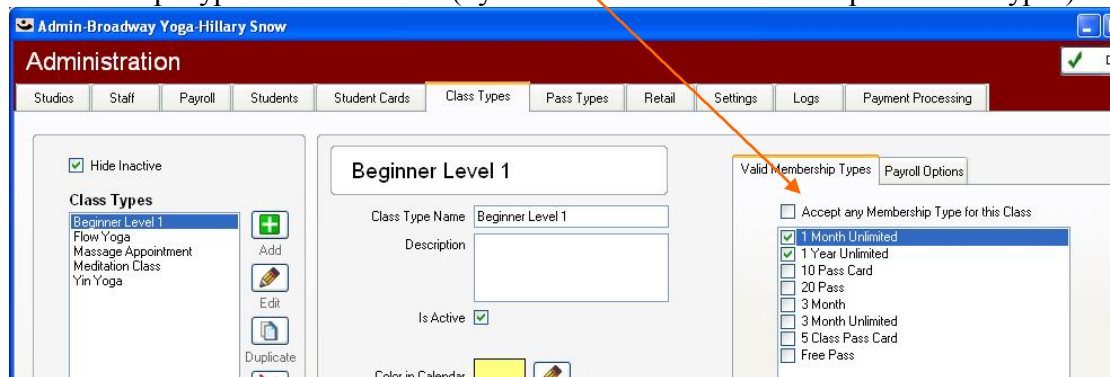
Step 1: Configuring Class Types

1. In the “Administration” window, click on the *Class Types* tab. From the *Class Types* list on the left, select which *Class Type* you wish to set. Once selected, the class will be highlighted.



2. Click the Edit button.

3. Valid Membership Types: You may select either *Accept any Membership Types for this Class* or choose from you list below—more than one may be chosen—click to highlight first and then again to include. You may only choose from the list below if you have unchecked “Accept any Membership Type for this Class.” (by default all classes will accept all Pass Types).



4. At the bottom of the window, click “OK.”



Part 3: Configuring Payroll Options

1. In the top right click on *Payroll Options*.
2. You may select either: *Pay by Time*, *Pay by Student* or *None*.

- To *Pay by Time*, enter the *Instructor Pay Rate* (hourly) and *Class Counts As* (instructional time plus pre- and post class set-up or whatever # or fraction of hours you pay teachers for each time they teach this type of class.).

- Alternatively you may input the *Pay Student Rate*.

- Otherwise choose *None*.

3. Click “OK.”

