

#### **Creating Memberships on Merlin**

Memberships are set up in 3 ways. Firstly, a main group is setup for the memberships; this is at a zero price and holds all of the variants. Secondly, the variants are set up and are added to the main group ready for sale. Thirdly, for each of these variants the redemptions and renewals are set up and then added on to keep track of customer's visits and to offer them a renewal when their membership has expired.

1. Double click on the 'Stock Control' icon.



2. Double click on 'Maintain Stock File'.

Maintain Stock File

3. Type a code for a Membership in the 'Product Code' and click 'New'. The rest of the boxes should be highlighted now. Fill in the details.

- 'Product Description' is what you would like to be displayed on the web or till.
- 'Type' would be 'W Merlin Membership'.
- 'Stock Cat. 1'. Select a category (for e.g. Admissions).
- 'Pack Type' would be 'Units'.





#### Merlinsoft

www.merlinsoft.co.uk 01226294413 sales@merlinsoft.co.uk

### Merlinsoft//

4. Click 'Save'. Th	e window should automatically change to the ' <b>Pricing'</b>	tab. Fill in the det	ails.
- 'Pack Size' is T. - 'Last Unit Cost'			
- Check the ' <b>Sellin</b> - Next to the <b>'Sell</b> i	<b>IG Price'</b> option and select <b>'Standard'</b> for the VAT. <b>Ing Price'</b> type 0.		
- Click 'Add'.			
	Maintain Stock File		
	Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Visitors V.	▶ Save	
	Product Code ADM-MEM      Product Description  Location  Single Branch Only	X Cancel	
	This Product has currently no prices.	Refresh	
	Pack Size 1 Units v Last Unit Cost £ 0		
	Ask for price at sale in EPOS Ask to price at sale in EPOS Clear		
	C Margin % -1.699999!		
	Add Delete	Status	
	Maintain	Stock File	
	Master Detaile Pricing Discounts Quantities Sales Analysis Comments Image Quiston Visitors V.		
	Product Code Product Description Location	Save	
	Packsize 1	Cancel	
	Last Cost £0.00 Next Cost -		
	1+ £0.00		
	Last Unit Cost £ 0.00 In Stock Packsize Cost Price Packs % Margin		
	Next Unit Cost £       Ask for price at sale in EPOS		
	Price Scheme £ 0.00	DI'	
	Actual Margin % -1.69999999		
	Maintain	Stock File	

www.merlinsoft.co.uk 0 1 2 2 6 2 9 4 4 1 3 sales@merlinsoft.co.uk

# Merlinsoft//



5. Click **'Save'** on the right-hand side. Now you need to create variants for each voucher such as Adult, Child, and Senior etc. You need to repeat step 3 using a different code for your membership (for e.g. ADM-MEMADULT).

NOTE: for family memberships and memberships that require more than one member select the headcount to how many names you require. e.g. 1 will only ask for one member name, 4 will require 4 names.



Merlinsoft

#### www.merlinsoft.co.uk 0 1 2 2 6 2 9 4 4 1 3 sales@merlinsoft.co.uk

# Merlinsoft//



#### 6. Click 'Save'. You need to fill in the 'Pricing Tab'.

- 'Pack Size' is 1.
- 'Last Unit Cost' is 0.
- Check the 'Selling Price' option and select 'Standard' for the VAT.
- Next to the 'Selling Price' type in the price of the membership you are creating (for e.g. £10.00).
- Click 'Add'.

ADM-MEMADULT -	Product Description Adult Membership	Location Single Branch Only	Cancel	
This Product has currently no price	S.		C Refresh	
Add Pack / Price Break	hits 💌 Last Unit Cost £ 0			
Price Break	Ask for price at sale in EPOS	Add		
	Selling Price      10.00	Clear		

7. Go back to the 'Master Details' tab at the top, and type in the 'Product Code' the main membership you created or click on the Ellipsis (...) to find it (for e.g. ADM-MEM). The information from earlier should already be there.

	ADM-MEM Member	rship Single Branch Only	X Cancel
	EPOS Description	VAT Code 1) 20.00 - Standard	Keiresh
	Type  W - Merlin Membership  Gift Aid  Gift Aid  Inc in Loyalty Scheme	Length 1 文 Year(s) 🗸	i i i i i i i i i i i i i i i i i i i
	Brand 💽 🛨	Redemption Code	
	Stock Cat. 1 Admissions	Renewal Code	
1,02,60	Stock Cat. 2  Park Type Units	Next Renewal Code	
	Send to Kitchen Printer	Head Count	51TV
	Account Codes		
5.63.22	Sales Cost Stock	Edit Wellcome Edit Card Edit Renewal	
			Status
		Maintain St	tock File

www.merlinsoft.co.uk 0 1 2 2 6 2 9 4 4 1 3 sales@merlinsoft.co.uk

Merlinsoft

### Merlinsoft//



	Product Code ADM-MEM	Image Custom Menin Online Online In	Location Single Branch Only	Save Cancel Refresh
	Product Code	Description	Price	
				100
				I RA
				Status
			Mainta	in Stock File
	duct Code [F2]	Description [F3]	Price [F9]	Category 1 [F4]
Pro	duct Code [F2]	Description [F3] Membership	Price [F9] £0.00 (1)	Category 1 [F4] Admissions

Product Code ADM-MEM	Construct the second seco	Location Single Branch Only	Cancel	
ADM-MEMAD	JLT Add Delete	Price	Refresh	
	ULT Adult Membership	£10.00		
3-66				
			Status	

You need to repeat steps 5-9 to create all the variants for the Memberships.



Merlinsoft

www.merlinsoft.co.uk 0 1 2 2 6 2 9 4 4 1 3 sales@merlinsoft.co.uk

# Merlinsoft//



#### **Membership Redeem**

You need to add a redemption code to each priced membership, to do this you need to create a zero priced redemption.

1. Type a code for the Redemption (for e.g. ADM-MEMRED) in the '**Product Code'** and click '**New'**. The rest of the boxes should be highlighted now. Fill in the details.

- 'Product Description' is what you would like to be displayed on the web or till.
- 'Type' would be 'D Membership Redeem'.
- 'Stock Cat. 1'. Select a category (for e.g. Admissions).
- 'Pack Type' would be 'Units'.

Product Code	Product Description	Location	Save
ADM-MEMRED 💌 🥰	New Membership Redemption	Single Branch Only 💌	X Cancel
Master Details			(Closed)
EPOS Description			Kerresi
Type D - Membership Re	deem 💌		
🔽 Gift Aid 🔽 Inc	in Loyalty Scheme		
Brand	<u>→</u> <u>⊨</u>		
Stock Cat. 1 Admissions	▼ ■		
Stock Cat. 2			
Pack Type Units	•		
Send to Kitchen	Printer		
Members Only			
Sales Cost	Stock		
			Status

2. Click 'Save'. The window should automatically change to the 'Pricing' tab. Fill in the details.

- 'Pack Size' is 1.
- 'Last Unit Cost' is 0.
- Check the 'Selling Price' option and select 'Standard' for the VAT.
- Next to the 'Selling Price' type 0.
- Click 'Add'.



www.merlinsoft.co.uk 0 1 2 2 6 2 9 4 4 1 3 sales@merlinsoft.co.uk

### Merlinsoft//

	Maintain Stock File	
	Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Ticket Visitors	
VE	Product Code Product Description Location	Save
N IL-	ADM-MEMRED I III Kew Membership Redemption Single Branch Only	X Cancel
	Packsize 1	2 Refresh
EMBE	Last Cost ±0.00 Next Cost -	
	1+ £0.00	
$\cap \Box \Box$	Last Unit Cost £ 0.00 In Stock Packsize Cost Price Packs % Margin	
	Next Unit Cost £	
	Ask for price at sale in EPOS	
Sec. 2 8 5	© Selling Price € [0.00	
	Actual Margin % -1.699999999!	
- F \ \ 2 1	Edit Add Delete	Status
	Maintain	Stock File

3. Click 'Save' on the right hand side. This redemption needs to be attached to the priced membership. In the 'Product Code' type in the membership (for e.g. ADM-MEMADULT). On the 'Master Details' tab there will be a 'Redemption Code' box on the left. Either type in the redemption code or click on the Ellipsis (...) and select it.

Product Code	Pro	duct Description	Location		Save	
ADM-MEMADULT	\star 🔍 🗋 New 🗛	ılt Membership	Single Branch On	ily 👻 🗙	Cancel	
Master Details		Membership Details			Dofforth	
EPOS Description		VAT Code 1) 20.00 - Star	ndard	-	Kellesh	
Type W -	Merlin Membership 🔹	Length 1	♦ Year(s)	- -		
Г G	ift Aid 🦵 Inc in Loyalty Schem	Discount Level	7		17	
Brand	▼ 🕒	Redemption Code				
Stock Cat. 1 Adm	issions 💌 主	Benewal Code	1			
Stock Cat. 2	<u>•</u> 🗄					
Pack Type Units	s 💌	Next Renewal Code				
∏ S	end to Kitchen Printer Iembers Only	Head Count 1	Max Age 0	•		
Account Codes	,					
Sales Co	st Stock		. I awa	- 1		
1 I.	4	Edit Wellcome Edit C	Card Edit Rene	wal	tatus	

4. Click **'Save'.** Repeat the step above and attach the redemption to all the membership variants you have (for e.g. ADULT, CHILD, SENIOR, CONCESSION etc.).



www.merlinsoft.co.uk

sales@merlinsoft.co.uk

01226294413

Merlinsoft//



#### Membership Renewal

You also need to create a renewal code for each priced membership. It's up to you whether you want to renew at the same price or a discounted price.

1. Type a code for the Renewal (for e.g. ADM-MEMREN) in the '**Product Code'** and click '**New'.** The rest of the boxes should be highlighted now. Fill in the details.

- **'Product Description'** is what you would like to be displayed on the web or till.
- 'Type' would be 'W Merlin Membership'.
- 'Stock Cat. 1'. Select a category (for e.g. Admissions).
- **'Pack Type'** would be **'Units'**.

Product Code	I 💽 🔍 🗋 Nev	Product Description	Location Single Branch Only	
Master Details EPOS		_		G R
Description Type	W - Merlin Membership	<b>.</b>		
Brand	Gift Aid V Inc in Loyalt	✓ Scheme		
Stock Cat. 1	Admissions	- <u>-</u>		
Stock Cat. 2		- <u>-</u>		
Раск Гуре	Units Send to Kitchen Printer Members Only			
Account Code Sales	s Cost Stock	211		

2. Click 'Save'. The window should automatically change to the 'Pricing' tab. Fill in the details.

- 'Pack Size' is 1.
- 'Last Unit Cost' is 0.
- Check the 'Selling Price' option and select 'Standard' for the VAT.
- Next to the '**Selling Price'** type in a price for the renewed membership (for e.g. £7.50 for a 25% discount).
- Click 'Add'.



#### Me

www.merlinsoft.co.uk 0 1 2 2 6 2 9 4 4 1 3 sales@merlinsoft.co.uk

### Merlinsoft//

Maintain Stock File     Macher Details     Pricing     Discounte   Quantities   Solar Applicits     Comments   Image   Quantities   Solar Applicits	
Product Code Product Description Location Single Brand	
This Product has currently no prices.	Refresh
Add Pack / Price Break         Pack Size       1         Units       Last Unit Cost £         Price Break       1         Ask for price at sale in EPOS       Add         Price Break       1         Selling Price       5         % 100.00       100.00	
Add Delete	Status

3. Go back to the **'Master Details'** tab and add the redemption code you created earlier. Click **'Save'**. Now you need to add the renewal to all the priced memberships you have created (for e.g. ADULT, CHILD, SENIOR, CONCESSION, etc.).

X Cancel
C Refresh
Keiresi

4. Type in the **'Product Code'** the priced membership (for e.g. ADM-MEMADULT), all the details will be filled in and you will see that the redemption box has a code. Below this you need to put in the renewal code you have just created. Either type it in or use the Ellipsis (...) to find it.



#### Merlinsoft

www.merlinsoft.co.uk 0 1 2 2 6 2 9 4 4 1 3 sales@merlinsoft.co.uk

# Merlinsoft//

	ЪМ	aintain Stock File				
		aster Details   Pricing   Discounts   Quantities   Si Product Code Pr	ales Analysis   Comments   Image   Custom   M oduct Description Location	Merlin Onlin 💶 🕨	/e	
		ADM-MEMADULT 🔽 🧠 🗅 New Ac	ult Membership Single Bra	anch Only 💌 🔀 Can	cel	
		EPOS Description	VAT Code 1) 20.00 - Standard		esh	
		Type W - Merlin Membership ▼ Gift Aid 「 Inc in Loyalty Sche	Length 1 Year(s)			
		Brand  Stock Cat. 1 Admissions	Redemption Code ADM-MEMRED			
		Stock Cat. 2	Renewal Code			
		Send to Kitchen Printer	Head Count	ge 0 🚖		
		Account Codes Sales Cost Stock			ACC	
			Edit Wellcome Edit Card Edi	dit Renewal Status		
			Ма	intain Stock F	File	
5. Click <mark>'Sav</mark>	<b>e'.</b> Repeat	t this step for all the va	riants.			
5. Click <b>'Sav</b>	r <b>e'.</b> Repeat	t this step for all the va	riants.			
5. Click <b>'Sav</b>	r <b>e'.</b> Repeat	t this step for all the va	riants.	6		N N S R N S
5. Click <b>'Sav</b>	r <b>e'.</b> Repeat	t this step for all the va	riants.			
5. Click 'Save	r <b>e'.</b> Repea Maintain Stoc Master Details	t this step for all the va k File   Pricing   Discounts   Quantities   Sales	riants.	tom   Merlin Onlir.		1 71 / 2 1 1 0
5. Click 'Save	Maintain Stoc Master Details Product Code	t this step for all the va	riants.	tom   Merlin Onlin •	Save	
5. Click 'Save	Maintain Stoc Master Details Product Code ADM-MEMAD	t this step for all the va k File Pricing   Discounts   Quantities   Sales JLT Q D New   Adult	riants. s Analysis   Comments   Image   Cust ict Description Loc Membership   Sin	tom   Merlin Onlir • •	Save Cancel	
5. Click 'Save	Maintain Stoc Master Details Product Code ADM-MEMADI Master Details EPOS	t this step for all the va	riants. s Analysis   Comments   Image   Cust ict Description Loc Membership Details VAT. Code   1) 20.00 - Standard	tom   Merlin Onlir • •	Save Cancel	
5. Click 'Save	Maintain Stoc Master Details Product Code ADM-MEMADI Master Details EPOS Description	t this step for all the va	riants.	tom   Merlin Onlir	Save Cancel	
5. Click 'Save	Maintain Stoc Master Details Product Code ADM-MEMADI Master Details EPOS Description Type	t this step for all the va	riants.	tom   Merlin Onlir • • • • • • • • • • • • • • • • • • •	Save Cancel	
5. Click 'Save	Maintain Stoc Master Details Product Code ADM-MEMADI Master Details EPOS Description Type Brand	t this step for all the va	riants.	tom   Merlin Onlir • • cation ngle Branch Only • Year(s) •	Save Cancel	
5. Click 'Save	Maintain Stoc Master Details Product Code ADM-MEMADI Master Details EPOS Description Type Brand Stock Cat. 1	t this step for all the va	riants. s Analysis Comments Image Cust ict Description Loc Membership Details VAT Code 1) 20.00 - Standard Length 1 1 1 Discount Level 0 1 Redemption Code ADM-MEMRE Renewal Code ADM-MEMRE	tom   Merlin Onlir · · · cation ngle Branch Only · · Year(s) · · ED · · · ·	Cancel	
5. Click 'Save	Maintain Stoce Master Details Product Code ADM-MEMAD Master Details EPOS Description Type Brand Stock Cat. 1 Stock Cat. 2	t this step for all the va	riants.	tom   Merlin Onlir 1	Cancel	
5. Click 'Save	Maintain Stoce Master Details Product Code ADM-MEMADI Master Details EPOS Description Type Brand Stock Cat. 1 Stock Cat. 2 Pack Type	t this step for all the va k File Pricing Discounts Quantities Sale ULT I Q Produ ULT I Q New Adult W - Merlin Membership I Adult M - Merlin Membership I Adult M - Merlin Membership I Inc in Loyalty Scheme I Gift Aid I Inc in Loyalty Scheme I Gift Aid I Inc in Loyalty Scheme I Discounts I Inc in Loyalty I Inc Inc In Loyalty I Inc Inc Inc Inc Inc Inc Inc Inc Inc I	riants.	tom   Merlin Onlir • • cation ngle Branch Only • Year(s) • ED · · · · ED · · · · EN · · · · Max Ane 0 •	Cancel	
5. Click 'Save	America Control Contro	t this step for all the va k File Pricing Discounts Quantities Sale ULT  Q Produ Adult W - Merlin Membership Gift Aid Inc in Loyalty Scheme Gift Aid Inc in Loyalty Scheme Admissions  D Admissions  D D Units  Send to Kitchen Printer Members Only	s Analysis Comments Image Cust ict Description Loc Membership Details VAT Code 1) 20.00 - Standard Length 1 • 1 Discount Level 0 • Redemption Code ADM-MEMRE Renewal Code ADM-MEMRE Next Renewal Code Head Count 1 • 1	tom   Merlin Onlir · · · cation ngle Branch Only · · Year(s) · · ED · · · · EN · · · Max Age 0 •	Cancel	
5. Click 'Save	Account Code Sales	k File   Pricing   Discounts   Quantities   Sale   ULT     Quantities   Sale   ULT     Quantities   Sale   W - Merlin Membership   Gift Aid   Inc in Loyalty Scheme   Image: Send to Kitchen Printer   Members Only   Send to Kitchen Printer   Members Only	riants.	tom   Mertin Onlir • • cation ngle Branch Only • Year(s) • ED · · · · ED · · · · Max Age 0 •	Cancel	
5. Click 'Save	Maintain Stock Master Details Product Code ADM-MEMAD Master Details EPOS Description Type Brand Stock Cat. 1 Stock Cat. 2 Pack Type Account Code Sales	t this step for all the values of the values	riants.	tom   Merlin Onlir • • cation ngle Branch Only • Pear(s) • ED · · · · ED · · · · EN · · · Max Age 0 •	Cancel	



Merlinsoft

www.merlinsoft.co.uk 01226294413 sales@merlinsoft.co.uk

# Merlinsoft//