



# 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'.



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'.



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4. 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'**.



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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.**

**Maintain Stock File**

Master Details

Product Code: ADM-MEMADULT Product Description: Adult Membership Location: Single Branch Only

EPOS Description: Type: W - Merlin Membership

Brand: Stock Cat. 1: Admissions Stock Cat. 2: Pack Type: Units

Send to Kitchen Printer: Members Only: Account Codes: Sales: Cost: Stock:

Save Cancel Refresh Status

**Membership Details**

VAT Code: 1) 20.00 - Standard Length: 1 Year(s): Discount Level: 0

Redemption Code: ADM-MEMRED Renewal Code: ADM-MEMREN Next Renewal Code:

Head Count: 3 Max Age: 0

Edit Wellcome Edit Card Edit Renewal



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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'**.

**Maintain Stock File**

Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Visitors v. 1.0

Product Code: ADM-MEMADULT Product Description: Adult Membership Location: Single Branch Only

This Product has currently no prices.

Add Pack / Price Break:

Pack Size: 1 Units: Last Unit Cost: £ 0

Price Break: 1

Ask for price at sale in EPOS: ☐

Price Scheme: ☒ Selling Price £ 10.00 ☐ Margin % 100.00

Add Delete

Save Cancel Refresh Status

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.

**Maintain Stock File**

Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Merlin Onlin v. 1.0

Product Code: ADM-MEM Product Description: Membership Location: Single Branch Only

Master Details:

EPOS Description: Type: W - Merlin Membership ☐ Gift Aid ☐ Inc in Loyalty Scheme

Brand: Stock Cat. 1: Admissions Stock Cat. 2: Pack Type: ☐ Send to Kitchen Printer ☐ Members Only

Account Codes: Sales: Cost: Stock:

Membership Details:

VAT Code: (1) 20.00 - Standard Length: 1 Year(s): Discount Level: 0

Redemption Code: Renewal Code: Next Renewal Code: Head Count: 1 Max Age: 0

Edit Wellcome Edit Card Edit Renewal

Save Cancel Refresh Status



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8. Click on the right arrow at the top to select the 'Variants' tab. Click on the Ellipsis (...) to select the priced membership you created. Once selected click 'Proceed' at the bottom of the window.

Product Code	Description	Price
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Product Code [F2]	Description [F3]	Price [F9]	Category 1 [F4]
ADM-MEM	Membership	£0.00 (1)	Admissions
ADM-MEMADULT	Adult Membership	£10.00 (1)	Admissions

9. Click 'Add'. It should now appear below in the window. Then click 'Save' on the right hand side.

Product Code	Description	Price
ADM-MEMADULT	Adult Membership	£10.00

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



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## 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**'.

The screenshot shows the 'Maintain Stock File' window with the 'Master Details' tab selected. The 'Product Code' field contains 'ADM-MEMRED'. The 'Product Description' field contains 'Membership Redemption'. The 'Location' dropdown is set to 'Single Branch Only'. In the 'Master Details' section, the 'Type' dropdown is set to 'D - Membership Redeem'. The 'Inc in Loyalty Scheme' checkbox is checked. The 'Stock Cat. 1' dropdown is set to 'Admissions'. The 'Pack Type' dropdown is set to 'Units'. The 'Send to Kitchen Printer' and 'Members Only' checkboxes are unchecked. The 'Account Codes' section has empty fields for 'Sales', 'Cost', and 'Stock'. On the right side, there are buttons for 'Save', 'Cancel', 'Refresh', and '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**'.



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**Maintain Stock File**

Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Ticket Visitors

Product Code: ADM-MEMRED Product Description: Membership Redemption Location: Single Branch Only

Packs:

Packs	Cost Price	Packs	% Margin
1	£0.00		

Last Unit Cost: £ 0.00 Next Unit Cost: £

Ask for price at sale in EPOS: ☐

Price Scheme: Selling Price £ 0.00 Margin % n/a Actual Margin % -1.699999999

Edit Add Delete

Save Cancel Refresh

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.

**Maintain Stock File**

Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Merlin Online

Product Code: ADM-MEMADULT Product Description: Adult Membership Location: Single Branch Only

Master Details:

EPOS Description: W - Merlin Membership Type: ☐ Gift Aid ☐ Inc in Loyalty Scheme Brand: Stock Cat. 1: Admissions Stock Cat. 2: Pack Type: Units ☐ Send to Kitchen Printer ☐ Members Only Account Codes: Sales Cost Stock

Membership Details:

VAT Code: 1) 20.00 - Standard Length: 1 Year(s): 1 Discount Level: 0

Redemption Code: [Ellipsis]

Renewal Code: [Ellipsis]

Next Renewal Code: [Ellipsis]

Head Count: 1 Max Age: 0

Edit Wellcome Edit Card Edit Renewal

Save Cancel Refresh

Status

**Maintain Stock File**

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.).



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## 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'**.

The screenshot shows the 'Maintain Stock File' window with the 'Master Details' tab selected. The 'Product Code' field contains 'ADM-MEMREN' and the 'Product Description' field contains 'Membership Renewal'. The 'Location' dropdown is set to 'Single Branch Only'. Under 'Master Details', the 'Type' is 'W - Merlin Membership', and 'Inc in Loyalty Scheme' is checked. 'Stock Cat. 1' is set to 'Admissions' and 'Pack Type' is 'Units'. The 'Account Codes' section has empty fields for Sales, Cost, and Stock. On the right side, there are buttons for 'Save', 'Cancel', 'Refresh', and '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 in a price for the renewed membership (for e.g. £7.50 for a 25% discount).
- Click **'Add'**.



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**Maintain Stock File**

Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Visitors V. 1

Product Code: ADM-MEMREN Product Description: Membership Renewal Location: Single Branch Only

This Product has currently no prices.

Add Pack / Price Break:

Pack Size: 1 Units Last Unit Cost: £ 0

Price Break: 1

Ask for price at sale in EPOS: ☐

Price Scheme: ☒ Selling Price £ 7.50 ☐ Margin % 100.00

Add Delete

Save Cancel Refresh 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.).

**Maintain Stock File**

Master Details Pricing Discounts Quantities Sales Analysis Comments Image Custom Visitors V. 1

Product Code: ADM-MEMREN Product Description: Membership Renewal Location: Single Branch Only

Master Details:

EPOS Description: Type: W - Merlin Membership ☐ Gift Aid ☒ Inc in Loyalty Scheme Brand: Stock Cat. 1: Admissions Stock Cat. 2: Pack Type: ☐ Send to Kitchen Printer ☐ Members Only

Account Codes: Sales: Cost: Stock:

Membership Details:

VAT Code: 1) 20.00 - Standard Length: 1 Year(s): Discount Level: 0

Redemption Code: ADM-MEMRED

Renewal Code: Next Renewal Code: Head Count: 1 Max Age: 0

Edit Wellcome Edit Card Edit Renewal

Save Cancel Refresh Status

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.



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**Maintain Stock File**

Master Details | Pricing | Discounts | Quantities | Sales Analysis | Comments | Image | Custom | Merlin Online

Product Code: ADM-MEMADULT Product Description: Adult Membership Location: Single Branch Only

Master Details

EPOS Description: Type: W - Merlin Membership

Brand: Stock Cat. 1: Admissions Stock Cat. 2: Pack Type: Units

Membership Details

VAT Code: 1) 20.00 - Standard Length: 1 Year(s) Discount Level: 0

Redemption Code: ADM-MEMRED Renewal Code: Next Renewal Code: Head Count: 1 Max Age: 0

Save Cancel Refresh

Edit Wellcome Edit Card Edit Renewal Status

**Maintain Stock File**

5. Click 'Save'. Repeat this step for all the variants.

**Maintain Stock File**

Master Details | Pricing | Discounts | Quantities | Sales Analysis | Comments | Image | Custom | Merlin Online

Product Code: ADM-MEMADULT Product Description: Adult Membership Location: Single Branch Only

Master Details

EPOS Description: Type: W - Merlin Membership

Brand: Stock Cat. 1: Admissions Stock Cat. 2: Pack Type: Units

Membership Details

VAT Code: 1) 20.00 - Standard Length: 1 Year(s) Discount Level: 0

Redemption Code: ADM-MEMRED Renewal Code: ADM-MEMREN Next Renewal Code: Head Count: 1 Max Age: 0

Save Cancel Refresh

Edit Wellcome Edit Card Edit Renewal Status

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