A NEW DAWN

RELEASE 1.0

UNFREEZING CUSTOMER ACCOUNTS

HOW TO GUIDE

JUNE 2020

Gladstone

The process of unfreezing allows member account activity to resume as normal.

Important Note:
Prior to launching Plus2 for the first time since returning to work, consider the SoD (Start of Day) process and its impact. It is likely that, if SoD has not been executed for a long time, the process could take some duration to complete. SoD may also remove expired subscriptions from member records by virtue of the Expired Subs Retention Period. To discuss these options further, contact Gladstone for further advice.

Unfreezing Customer Accounts: How to guide

The process of unfreezing allows member account activity to resume as normal. This process can affect the Direct Debit collection and Entry point Infringements at site.

In the beginning of lock down, large volumes of Direct Debits were placed onto a frozen status. As a result, customer accounts would be placed on pause. Once permitted to reopen, business may resume customer account activity by unfreezing.

Unfreezing customer accounts can be completed using any of the following 3 methods:

## 1. Chargeable service provided by Gladstone Data Services

Following a consultation between your business and our Gladstone Data Services team, we can update specific customer accounts based on their status, subscription type or combinations of both allowing for greater flexibility and control.

This service is available to all clients as a fixed cost of £300.00
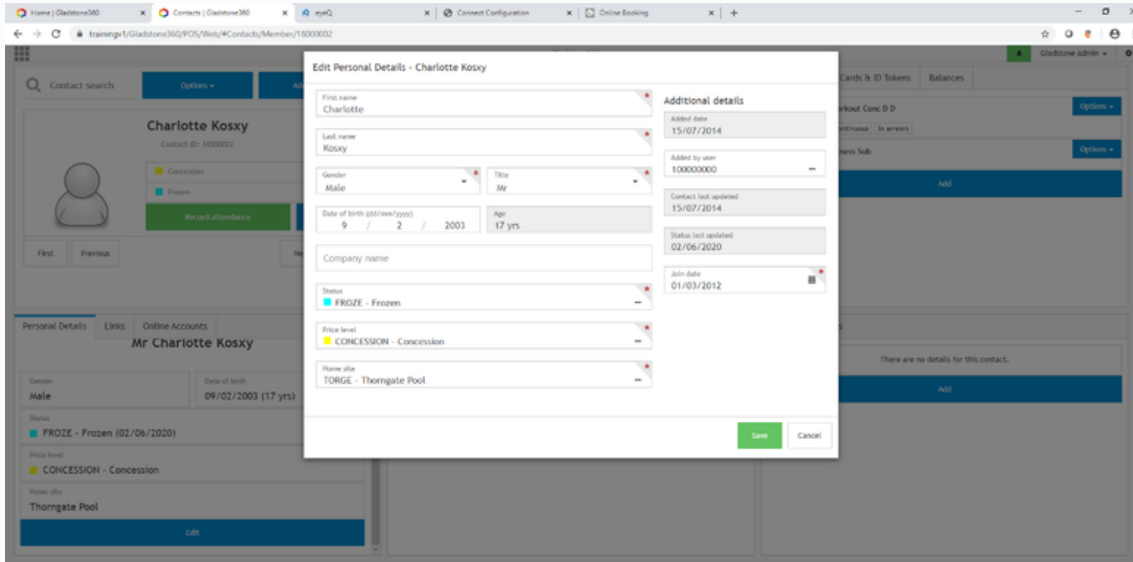
2. Case by case

Customer accounts may be modified using Plus2 or Gladstone360 on a case by case basis. Using Plus2, locate the customer account within the Members screen and select Modify Member.

Using the ellipsis button adjacent to the customers Status, modify the selection accordingly.
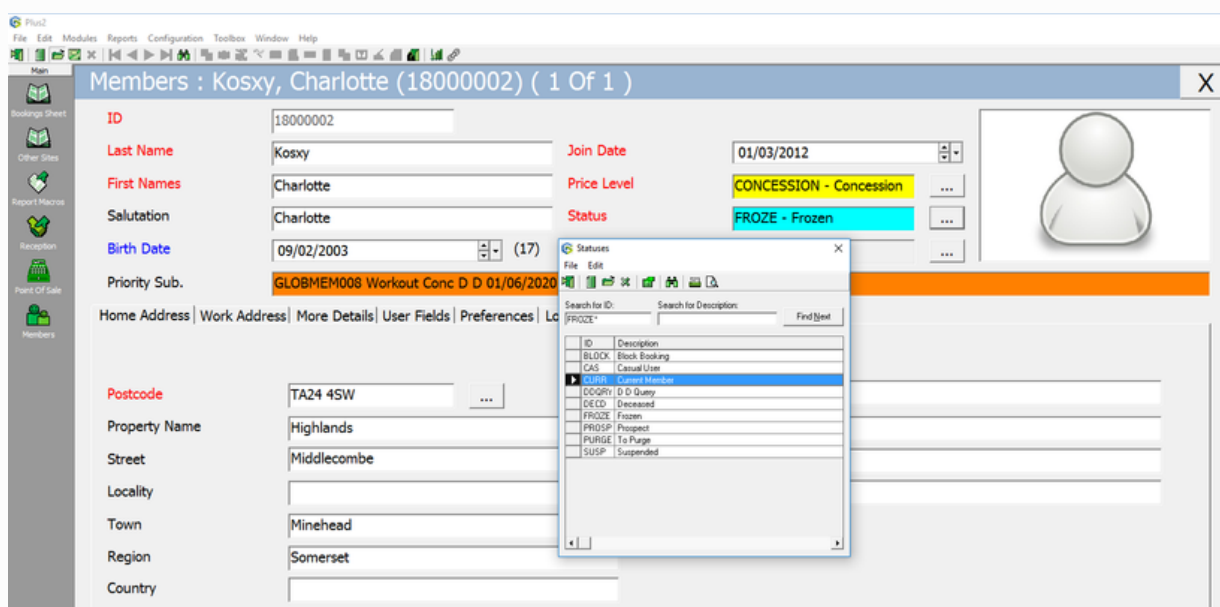
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Alternatively, using Gladstone360, locate the customer account within the Contacts screen. Within the Personal Details tab, clicking Edit will display a selection of fields to modify including Status.

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3. Using Enmasse Reporting

Enmasse functionality is only available via Plus2 Reports Generator. The process allows users to locate and display specific customer accounts based on conditions e.g. accounts with a status of Frozen.

Before committing any data changes, we recommend that you begin by identifying the number of customers on the frozen status using a Members List report. The recommended criteria is shown in the example below:

Upon reviewing and recording the results of the Members List, the report type may now be changed to Enmasse using the same conditions.

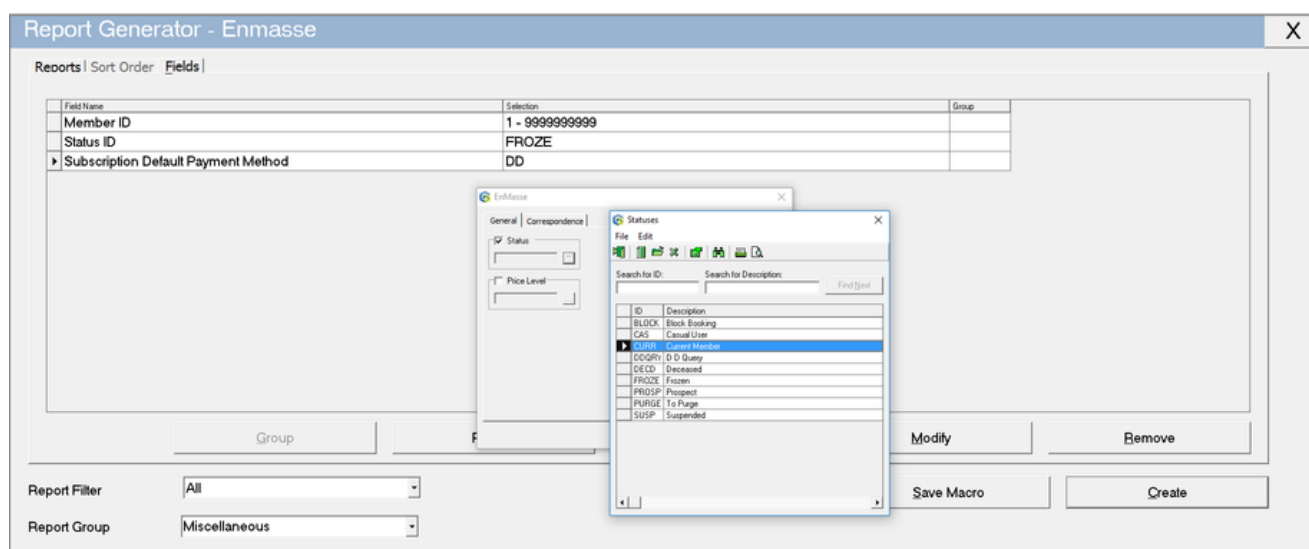Upon clicking Create, ensure the Status tick-box is selected. Using the ellipsis option for Status, choose an appropriate selection from this list such as Current Member or similar.
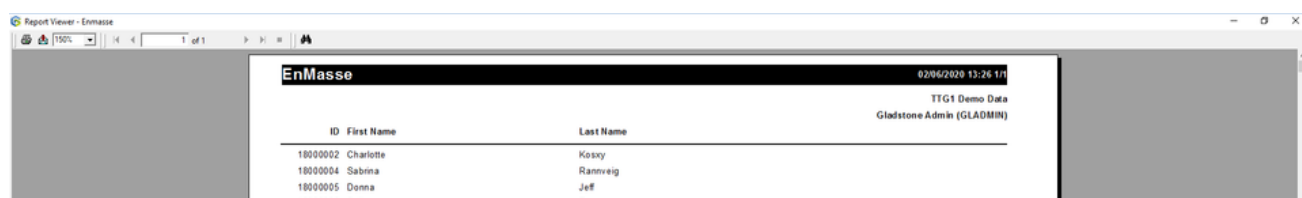
When executing an Enmasse report, Plus2 will provide a confirmation message summarising who the process will impact. Click OK to proceed.
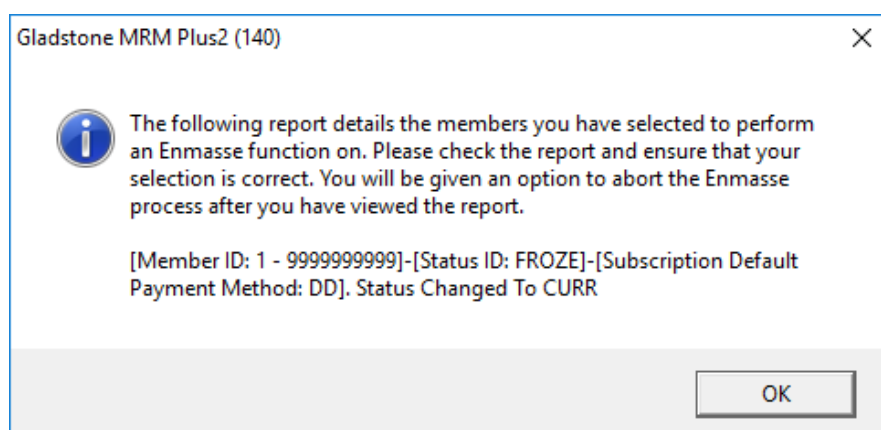

Open the Enmasse report and review the contents to ensure the records displayed are as expected. If required, this information can be exported into an Excel file using the Export File button.

If required, save the report contents, and close the summary report. Closing the report will trigger the final options box providing you with the last opportunity to continue or abort the Enmasse process.
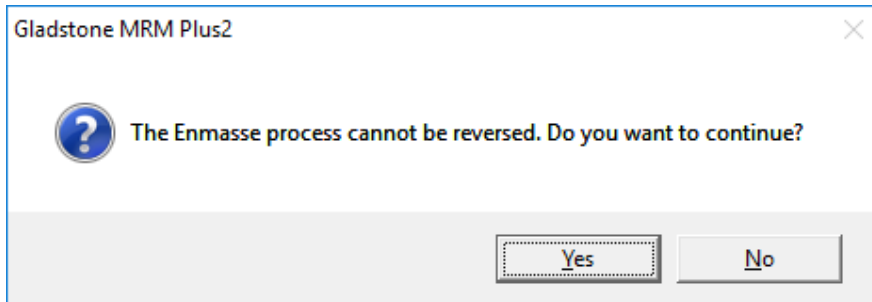
Selecting **No** will abort the Enmasse changes and return to the report criteria allowing further changes if required.

Select **Yes** to proceed and commit the changes into Plus2.

To confirm the changes have taken effect, consider running another Members List report or performing a test EFT run.

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