

A person in athletic wear is stretching on a road at sunrise. The person is wearing black leggings with pink accents and black sneakers with pink soles. They are holding their right leg with their right hand. The road is paved and has white dashed lines. The background shows a line of trees and a bright orange sun low on the horizon, creating a warm, golden glow over the scene.

A NEW DAWN

RELEASE 1.0

UNFREEZING CUSTOMER ACCOUNTS

HOW TO GUIDE

JUNE 2020



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

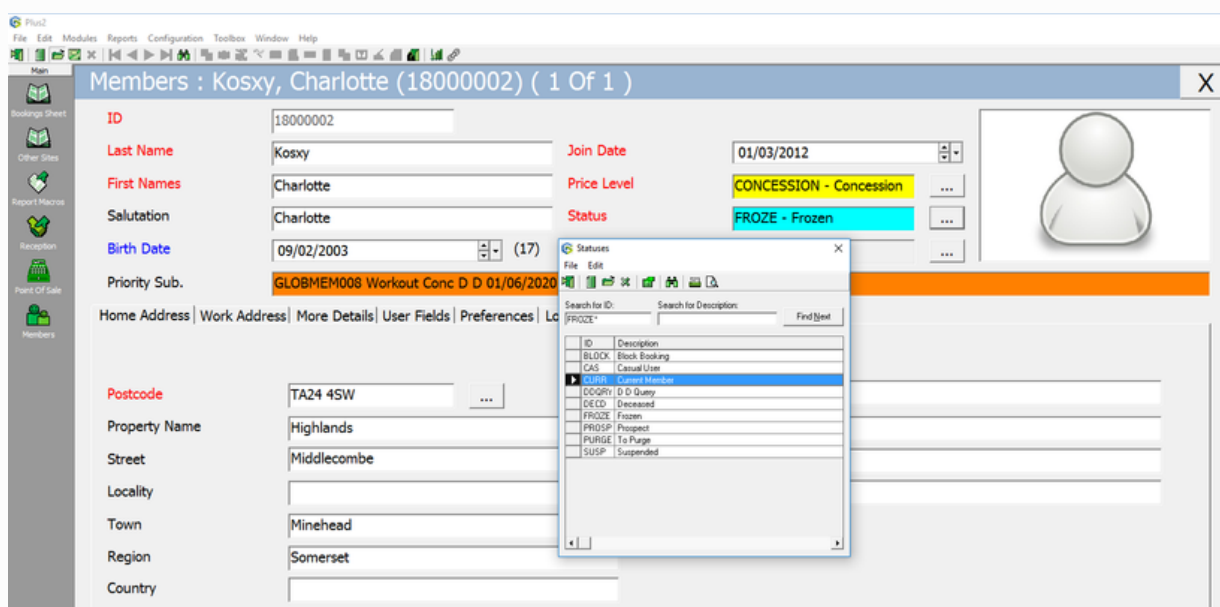
Following a consultation between your business and our Gladstone Data Services team, we can update specific customer accounts based on their status, subscription type or combinations of both allowing for greater flexibility and control.

This service is available to all clients as a fixed cost of £300.00

2. Case by case

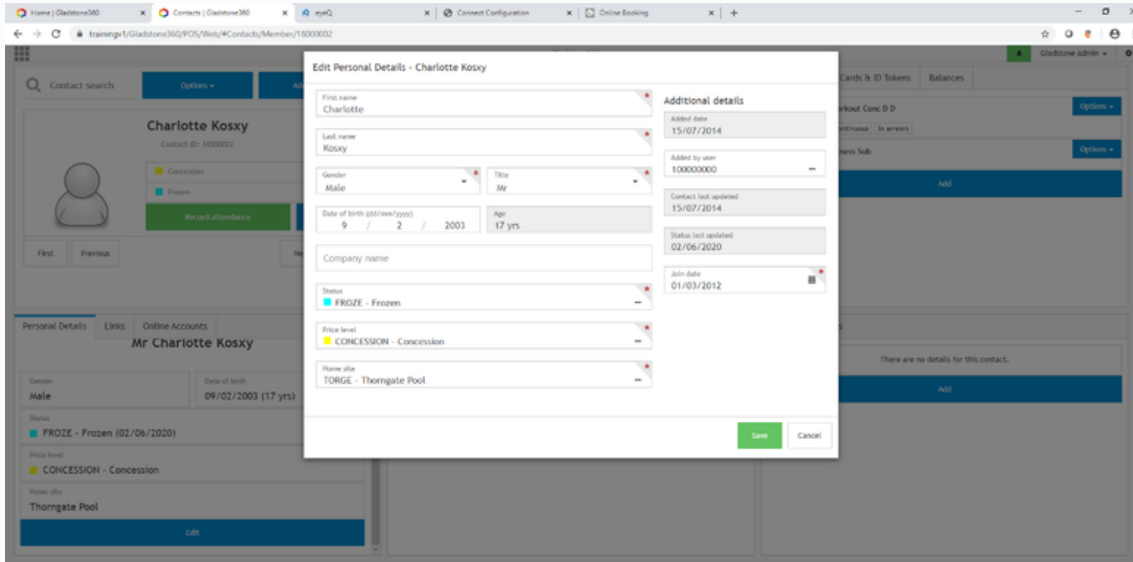
Customer accounts may be modified using Plus2 or Gladstone360 on a case by case basis. Using Plus2, locate the customer account within the Members screen and select Modify Member.

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.



The screenshot shows the 'Edit Personal Details' form for a customer named Charlotte Kosky. The form is displayed as a modal window over the main contact details page. The form fields are organized into two columns: 'Personal details' and 'Additional details'.

Personal details		Additional details	
First name	Charlotte	Added date	15/07/2014
Last name	Kosky	Added by user	100000000
Gender	Male	Contact last updated	15/07/2014
Title	Mr	Status last updated	02/06/2020
Date of birth (dd/mm/yyyy)	9 / 2 / 2003	Join date	01/03/2012
Age	17 yrs		
Company name			
Status	<input checked="" type="checkbox"/> FROZE - Frozen		
Price level	<input checked="" type="checkbox"/> CONCESSION - Concession		
Home site	TORGE - Thorngate Pool		

At the bottom right of the form are 'Save' and 'Cancel' buttons.



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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:

The screenshot shows the 'Report Generator - Member List' window. It has a tabbed interface with 'Reports', 'Sort Order', and 'Fields' tabs. The 'Fields' tab is active, showing a table with columns 'Field Name', 'Selection', and 'Group'. The table contains the following data:

Field Name	Selection	Group
Member ID	1 - 999999999	
Status ID	FROZE	
Subscription Default Payment Method	DD	

Below the table are buttons: 'Group', 'Repeat', 'Add', 'Modify', and 'Remove'. At the bottom, there are dropdowns for 'Report Filter' (set to 'All') and 'Report Group' (set to 'Members'), along with 'Load Macro', 'Save Macro', and 'Create' buttons.

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

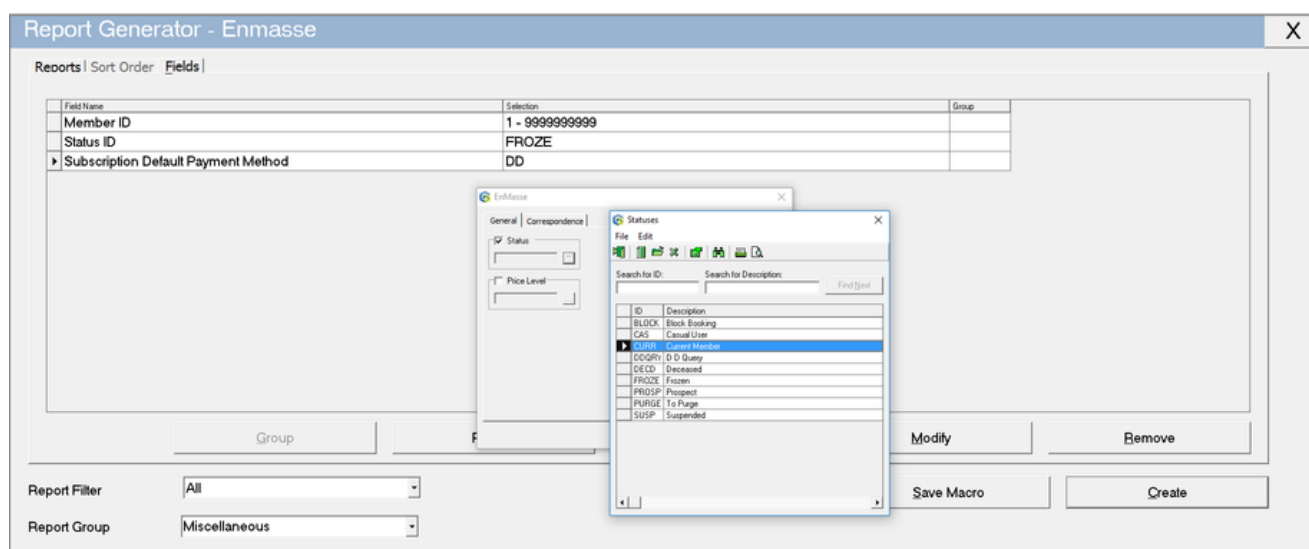
The screenshot shows the 'Report Generator - Enmasse' window. It has a tabbed interface with 'Reports', 'Sort Order', and 'Fields' tabs. The 'Fields' tab is active, showing a table with columns 'Field Name', 'Selection', and 'Group'. The table contains the following data:

Field Name	Selection	Group
Member ID	1 - 999999999	
Status ID	FROZE	
Subscription Default Payment Method	DD	

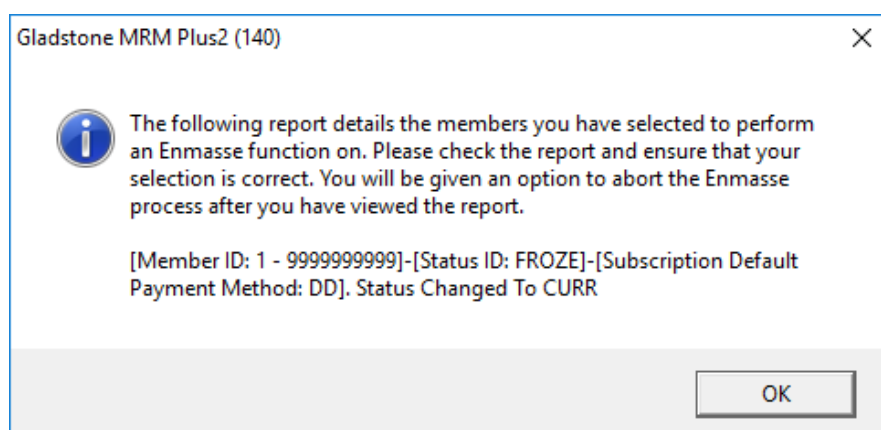
Below the table are buttons: 'Group', 'Repeat', 'Add', 'Modify', and 'Remove'. At the bottom, there are dropdowns for 'Report Filter' (set to 'All') and 'Report Group' (set to 'Miscellaneous'), along with 'Load Macro', 'Save Macro', and 'Create' buttons.

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.

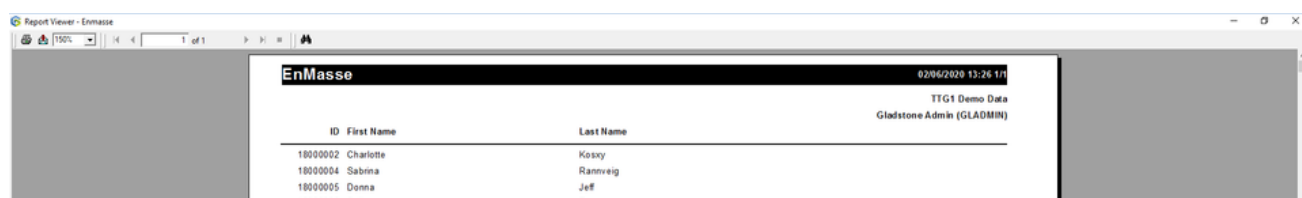
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When executing an Enmasse report, Plus2 will provide a confirmation message summarising who the process will impact. Click OK to proceed.

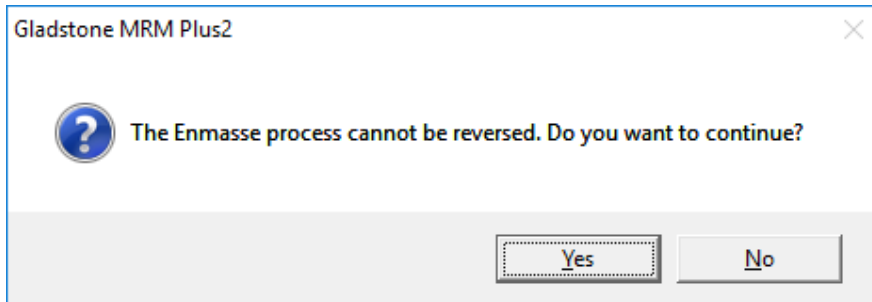


Open the Enmasse report and review the contents to ensure the records displayed are as expected. If required, this information can be exported into an Excel file using the Export File button.



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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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