

ADMISSIONS

SIGNING UP A NEW MEMBER

When signing up a new member the first thing to do is implement our **Challenge 25 Policy** and ask for ID if the person looks 25 or under.

This ID's accepted are:

- Driver's license (including provisional);
 - Passport;
 - Military ID Card;
 - ID Card with PASS Logo
1. When you are sure the customer is over the age of 18, you can get them to fill out the Membership Form.
 2. You need to ensure that all parts of the form are filled out to allow you to input it into the system.
 - a. When the form is complete, you should open up MAXIM, click on CUSTOMER DETAILS then CUSTOMER SEARCH and **input the information from the Membership Form**
 3. When you have filled out the required information, click SEARCH. The box below should say 'No Data to Display' – you can then click ADD NEW CUSTOMER
 4. This will generate a 'pop-up' box allowing you to select the customer's address. You should **ask the customer for their door number then make sure you repeat the street name back to them to ensure it is correct.**
 - a. If it's not the correct street you may have typed in the wrong postcode; if this is the case, you will have to go back to the previous screen and begin the process again.
 5. Once you have chosen the right address you should select the customers TITLE by clicking on the drop-down menu.
 6. Then ask the customer if they would like to receive marketing from us; this includes MONEY OFF VOUCHERS, BIRTHDAY CARDS & PROMOTIONS. They can choose to say yes to POST, TEXT or both.

- a. If they say yes to any of these, click the boxes beside each option to confirm these preferences
7. If you have asked the customer for ID, you also need to click the box next to AGE VERIFIED;
 - a. You should then click the box next to the type of ID you were shown.
8. The last section of this form asks “**how did you hear about us?**”. You will then need to click on the drop-down menu and click **IN HOUSE**
9. You then need to click SAVE to complete the application.
 - a. When you do this, the system might flag up other customers living in the same household, **if this happens you will need to click save again.**
 - b. The system could also flag up a PARTIAL MATCH if someone has matching details i.e. **same name, date of birth or phone number but not the same address.** If this happens you need **let management know**; the customer may have an existing membership which is banned or they may have a SELF EXCLUSION in place.
10. You can then PRINT A MEMBERSHIP CARD for the new customer; to do this you need to go onto MAXIM, type in their number, confirm it is them then click ‘Print Card’