Last Modified on 01/14/2025 3:13 pm EST

Membership Hold

Find Member > Activities > Recurring Billing

- 1. Find member.
- 2. Click Activities.
- 3. Click on the row of the currently active membership.
- 4. Click Recurring Billing.
- 5. Click the hold check box and enter the date range.
 - Holds should begin on the member's bill date (e.g., the 1st, 15th, etc.) and end on the last day of the billing cycle.
- 6. Enter hold dates and reason in the comments section for additional reference.
- 7. Click Save.
- 8. Verify hold on the Profile screen.

Shorten or Extend a Hold

- 1. Find member.
- 2. Click Activities.
- 3. Click on the row of the currently active membership.
- 4. Click Recurring Billing.
- 5. Edit date range. Ensure the end date is on the last day of a billing cycle.
- 6. Click Save.
- 7. Verify changes on the profile screen.

Remove Hold

NOTE: A hold only needs to be removed if a member decides not to hold their membership. Expiring holds will be removed automatically after the end date.

- 1. Find member
- 2. Click Activities
- 3. Click on the row of the currently active membership
- 4. Click Recurring Billing
- 5. Uncheck the hold check box
- 6. Click Save