How to Associate Documents with a Membership

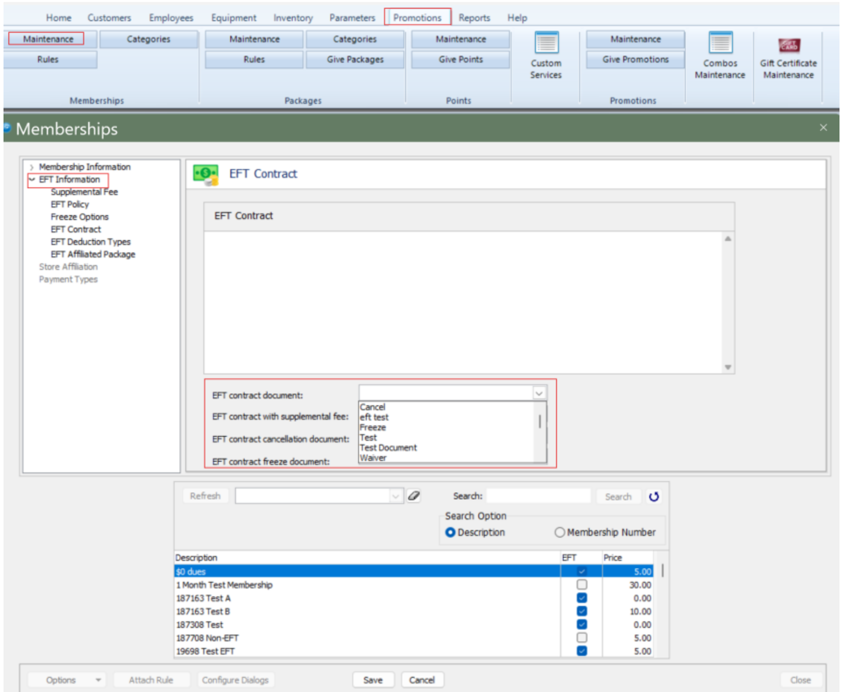
This article explains how to attach documents (such as EFT contracts or cancellation forms) to a membership, so they are used correctly during enrollment and billing.

Where to Set Membership Documents

- Membership documents are associated at the **membership level**, not on individual client accounts.
- To access this area:
- Go to the **Promotions** tab
- Select **Memberships Maintenance**
- Open the membership you want to edit

Attaching EFT and Contract Documents

- Within the membership setup:
- Select the **EFT Information** section
- Click on **EFT Contract**
- Use the available fields to attach the appropriate documents, such as:
    - EFT contract document
    - EFT contract with supplemental fee
    - EFT cancellation document
    - EFT contract freeze document
- Once attached, these documents will be automatically associated with that membership.



Important Notes

- Documents must be attached to the **membership itself** to be used correctly
- Attaching documents elsewhere (such as general parameters or client records) will not associate them with the membership
- Changes apply to new enrollments using that membership

Quick Checklist

- Promotions tab → Memberships Maintenance
- Open the correct membership
- EFT Information → EFT Contract
- Attach required documents
- Save changes

If documents are not appearing as expected, verify that you are editing the correct membership and that the documents are saved properly.