



Punch Card Instructions

A punch card is a virtual card that a member purchases for some number of sessions. The use of a punch card is an alternative method to pay for a session or an independent boat reservation. It may be most useful for members that have irregular schedules that prevent them from rowing on a regular, consistent basis.

NOTE: You must contact iCrew to turn on the use of punch cards for independent boat reservations.

iCrew supports one punch card for on-the-water rowing sessions and another for fitness/conditioning sessions that occur on land. This allows your organization to charge two different amounts based on the actual activity.

Activate a member's punch card

You must be designated as a coach or administrator in iCrew to make any changes to a member's punch card. This includes activating, deactivating, and making any adjustments to the balance on a punch card.

IMPORTANT: Go to your **Club Profile** and make sure the **Punch Card** functionality is turned on (see list of functions under **Functionality On/Off Switches**).

To activate a punch card for a particular member, open your club roster, find the member, and tap the punch card button (see red arrow below) to open the **Punch Card** page for the member.

The screenshot shows the 'Abbott Bay Rowing Roster' interface. At the top, there are three buttons: 'Register new member...', 'Extract roster...', and 'Get email addresses...'. Below these is a checkbox for 'Include archived members', a 'Show 100 entries' dropdown, and a search bar. The main part of the interface is a table with columns: Member Profile, Last name, First name, Archive, Journal Entries, Profile Picture, Punch Card, Title Name, Last LogOn, and Registration Date. A red arrow points to the 'Punch Card' button for the first member, Charlie A. A tooltip box next to the arrow says 'Tap to update the punch card for this member'.

Member Profile	Last name	First name	Archive	Journal Entries	Profile Picture	Punch Card	Title Name	Last LogOn	Registration Date
	Abbott	Charlie					Charlie A	2020-06-21	0000-00-00
	Abbott	Victoria					Victoria A	2020-06-09	2020-01-11
	Absford	Dee Dee					Dee Dee A	2020-01-08	2017-11-20

On the **Punch Card Balance Adjustment** page will open for the **rowing** punch card. You can switch to the **fitness** punch card by tapping the **View fitness punch card...** button.

Check the **punch card in use** checkbox to activate the member's punch card. If you want to charge the member's punch card only for drop-in sessions, check the **punch card for drop-ins only** checkbox. (**NOTE:** A "drop-in" is when a member attends a session for a team they're not a member of.)

In the **Balance adjustment amount** field, enter the number of sessions to be added to the member's punch card balance. For example, if the member has paid for 20 sessions, enter 20 in this field. You should also add a note to the **Balance adjustment note** field. Now tap the **Save** button, then tap the **Close** button.

Rowing Punch Card Balance Adjustment ⓘ

Member: Charlie Abbott

[View fitness punch card ...](#)

Check the **Rowing punch card in use** checkbox to activate a punch card. Check the **drop-ins only** checkbox to charge this member's punch card for drop-in sessions only. Enter an adjustment amount and note, then tap the **Save** button.

Rowing punch card in use: ☒

Rowing punch card for drop-ins only: ☐

Rowing punch card balance:

Balance adjustment amount:

Balance adjustment note:

[Save](#)

[Close](#)

History/Audit Trail

Punch Card Activity

If your club uses **PaySimple** to process payments, you can also automatically have iCrew activate and/or adjust a member's punch card when a payment is made for an associated fee item. **NOTE:** You must setup your punch card fee item following these rules:

- The fee item name must contain the words "punch card"
- The fee item name must also contain either the word "rowing" or "fitness".
- The fee item name must also contain the quantity of "punches" in parentheses.
- Use (?) for a fee item that the member can specify the quantity of punches at the time of purchase. Set the fee item amount equal to the cost of a single punch.

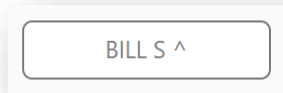
Here are a few examples of a properly formatted fee item name:

- Rowing punch card (20)
- Punch card for fitness (15)
- On the water rowing punch card (10)
- Rowing punch card (?)

The “punch” process

To “punch” the virtual punch card, a member simply checks into a session using the **Session Check-In** page. By checking into a session (tile goes from gray to blue), the member’s punch card will be debited (decreased) by one. A coach may also check a member into a session on the **Line-ups** page. If you’re using punch cards for reservations, the act of making a boat reservation will “punch” the card and cancelling a reservation will issue a credit to the member’s punch card.

You’ll also notice that if a member has an active punch card, their tile on the **Check In** and **Line-ups** page will be decorated with a ^ character after their name as shown here.

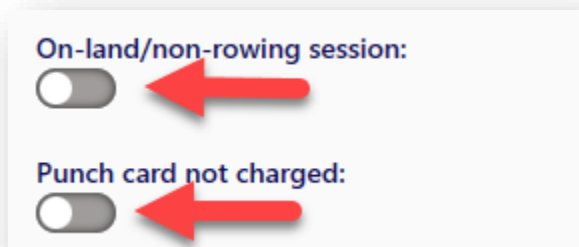


IMPORTANT: If the session is set as an **On-land/non-rowing session**, the member’s **Fitness** punch card will be debited. If it is not an on-land session, the member’s **Rowing** punch card will be debited. If a session is changed to on-land *after* members have checked in, manual adjustments will be required to adjust the member’s punch cards.

If a member is accidentally checked into a session, but was not actually present, checking them *out* (tile goes from blue to gray) will credit back their punch card balance by 1.

A coach or admin can visit the **Check In** page for a session after it has occurred and can change the check-in status of a member to adjust their punch card balance.

If a particular session is free or no charge for a member, a coach or admin must set the **Punch card not charged?** flag on the session record as shown below (see **red** arrow). This change needs to be made *before* any members check into the session.




Punch Card Report

Any coach or administrator can view the punch card balance reports. From the **Portal**, go to **Reports**, the tap **Punch Card Report**.

The **Punch Card Balance Report** is sorted by member’s last name, then first name. You can limit the information down to just those with a zero or negative balance by checking the **Negative or zero balance only checkbox**.

Tap the round pencil button to open the **Punch Card Balance Adjustment** page for member in the report (see **red** arrow below).








Rowing Punch Card Balance Report

 View fitness punch card report...

☐ Negative or zero balance only ☒ Active cards only

Show entries

Search:

 Last name	 First name	 Tile Name
 Abram	Ellen	Ellen A
 Arvidson	Amy	Amy A
 Babonas	Bill	Bill Ba
 Barclay	Chris	Chris B

As previously mentioned, you can use this page to make any punch card balance adjustments. To issue a debit, enter a negative number in the **Balance adjustment amount field**. For example, to debit a member for attending two sessions, enter -2 as the amount. Always include a note to explain the change you’re making. You can also credit a member by entering a positive number in the amount field.

You can see from the sample below, a full history/audit trail of a member’s punch card activity is provided at the bottom of the page.

Fitness Punch Card Balance Adjustment

Douglas Baker

View rowing punch card ...

Check the **Fitness punch card in use?** checkbox to activate a punch card. Enter an adjustment amount and note, then click the **Save** button.

Fitness punch card in use?:

☒

Fitness punch card balance:

4

Balance adjustment amount:

Balance adjustment note:

Save

Close

History/Audit Trail

Punch Card Activity

Date/Time	Transaction	Made by	Quantity	Balance	Note
2017-12-18 10:41:50	activate	Helen Tilghman			
2017-12-18 10:41:50	credit	Helen Tilghman	8	8	
2018-01-02 06:18:17	debit	Check-in page	-1	7	Check-in on 2018-01-02 to MastersAM Conditioning on-land session on 2018-01-02
2018-01-04 05:59:38	debit	Check-in page	-1	6	Check-in on 2018-01-04 to MastersAM Conditioning on-land session on 2018-01-04
2018-01-06 07:41:10	debit	Check-in page	-1	5	Check-in on 2018-01-06 to Masters Practice session on 2018-01-06
2018-01-09 06:02:02	debit	Check-in page	-1	4	Check-in on 2018-01-09 to MastersAM Conditioning on-land session on 2018-01-09

Additional Punch Card Information

The use of a punch card can also be used for reservations. Contact iCrew to turn on this option. Members that reserve and row their own boat will not get “punched”, but other members in the boat with an active punch card will get punched.