



# ClubReady Foundations

User Guide

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CLICK HERE TO GET STARTED





# Key Setup Checklist

Review this list to confirm key settings in your site are setup and correct



# Follow these steps!

1

- **Lead Assignment**
- Setup > Automation > Lead Assignment
- This allows to automatically assign leads to staff for follow ups.
- <https://clubready.zendesk.com/hc/en-us/articles/360042416011-Setup-Lead-Assignment->



2

- **Internal Reports**
- Setup > Communication > Internal Reports
- Set your email to receive emailed reports from ClubReady.
- <https://clubready.zendesk.com/hc/en-us/articles/360041410172-Internal-Reports>



3

- **Basic Email Settings**
- Setup > Communication > Communications Settings
- Set your Email Signature as well as Email Tags for email templates.
- <https://clubready.zendesk.com/hc/en-us/articles/360042226071-General-Communication-Settings>



4

- **POS Terminal Assignment**
- Setup > Sales > POS Terminals
- Choose which staff are allowed to manage cash drawer.
- <https://clubready.zendesk.com/hc/en-us/articles/360041262671-Assign-Staff-To-The-Full-POS>



# Follow these steps!

5

- **Staff Scheduled**
- Setup > Scheduling > Staff Scheduled
- Select which staff are to be enabled for scheduling.
- <https://clubready.zendesk.com/hc/en-us/articles/360042527711-Assign-Staff-To-Scheduling>



6

- **Online Sales Package**
- Setup > Sales > Sales Packages
- Enable a URL to be available for users to purchase an agreement online.
- <https://clubready.zendesk.com/hc/en-us/articles/360041817892-How-To-Enable-A-Sales-Package-For-Online-Sales>



7

- **Staff Hourly Pay Rate**
- Staff > Search for Staff > Go To Options > Time Clock Pay Rate
- Define the pay rate amount for your hourly employees.
- <https://clubready.zendesk.com/hc/en-us/articles/360042188092-Set-Hourly-Pay-Rates>



8

- **Staff Session Pay Rate**
- Setup > Scheduling > Services and/or Classes/Group
- Define the pay rate per session for your trainers and instructors.
- <https://clubready.zendesk.com/hc/en-us/articles/360042615531-Set-Staff-Pay-Rates-For-Services-And-Classes>



# Follow these steps!

9

- **Sales Tax Settings**
- Setup > Sales > Sales Settings > General
- Confirm your products, memberships, etc. are setup with the proper tax (if applicable)
- <https://clubready.zendesk.com/hc/en-us/articles/4406465269389-Create-A-Sales-Tax-Schedule>



10

- **ClubReady Invoices**
- Setup > ClubReady Invoices > Payment Preferences
- Add your email to keep up to date on all ClubReady billing (software fees, transaction fees, etc.)
- <https://clubready.zendesk.com/hc/en-us/articles/360042419451-ClubReady-Invoices>



11

- **Staff Permissions**
- Setup > Staff > Staff & Permissions
- Confirm your employees have the appropriate access assigned to them.
- <https://clubready.zendesk.com/hc/en-us/articles/360041847371-Add-A-New-Staff-Type-And-Set-Permissions>



12

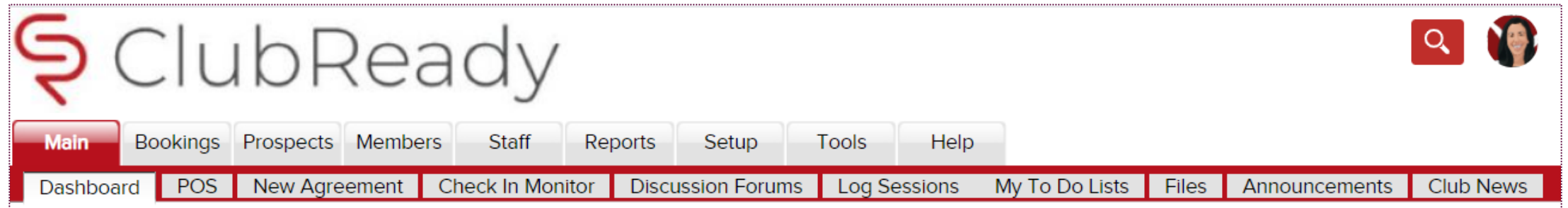
- **Booking Reminders**
- Setup > Scheduling > Booking Reminders
- Enable if you wish to automatically send reminders to your clients.
- <https://clubready.zendesk.com/hc/en-us/articles/4405010625293-Setup-Booking-Reminders>





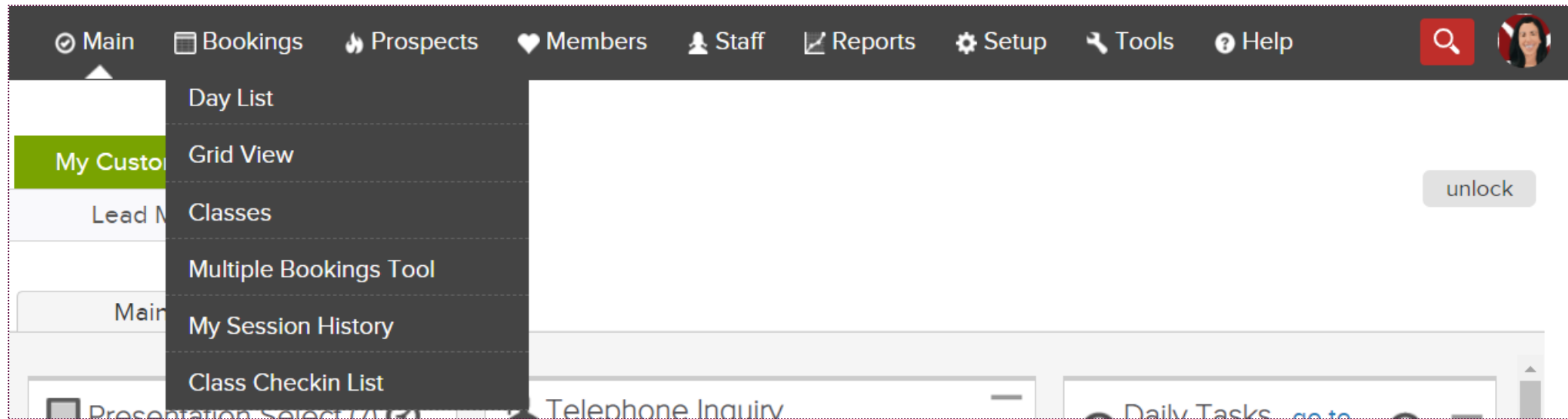
# Menu & Navigation

# ClubReady Menu Style: Large View



This menu style shows as tabs across the top of the page with the club logo in the corner.

# ClubReady Menu Style: Small View



This menu style takes up less space but has no club logo. This menu style offers the same menu options, with a drop down menu's as a single menu strip along the top of the page.

**Change The Menu Style -** <https://www.clubready.com/wiki/WK12387804136>

# Lookup Prospect

Prospects > Membership Prospects

○ Main

📅 Bookings

🔥 Prospects

♥ Members

👤 Staff

📊 Reports

⚙️ Setup

📖 Learn

Additional Filters

📌 PIN-OPEN

Lead Assigned To

Lead Added

All Lead Types

All Contact Types

All Genders

Last Action on Lead

Last Change to Lead Type

Lead Has Amenity

No Misc. Filter

All Referral Types

☰ Lead Lookup

My Saved Filters (1)

Search By Name

type name...

👤 4 Matches

show lead assignments

show recent | reset all

Awesome, Lady

Inc, Robert

Rowley, Brett

Testleifi, Justin

Tasks (3)

Email

Text (SMS)

✉️

Send An Email Blast To The Filtered List

Reply To:

don@mayweather.fit

Subject:

note - you can use [firstname] [lastname] tags in the

Email Template:

Prospect Email Blast (ClubReady Sys

Purpose:

Membership Sales [system]

📘

The selected email template contains a [content] email

B

I

U

🔗

Email Content has a limit of 7000 characters.

# Lookup Members

Members > Lookup

Main Bookings Prospects Members Staff Reports Setup Learn

Additional Filters

PIN-OPEN

- All
- Only Active Members
- Only Inactive Members
- Buying Services
- Not Buying Services
- Has Alerts
- Is Associated Member
- Is Responsible Member
- No Misc. Filters
- All Membership Types
- All Primary Trainers

Member Lookup

My Saved Filters (0)

Search By Name

type name...

3 Matches

[show recent](#) | [reset all](#)

Customer, Mister ✓

Demoleifi, caroline ✓

Smith, John ✓

Tasks (2) Email Text (SMS)

Send An Email Blast To The Filtered List

Reply To: don@mayweather.fit

Subject: note - you can use [firstname] [lastname] tags in the

Email Template: Customer/Member Email Blast (Club)

Purpose: Internal Sales (eg PT) [system]

The selected email template contains a [content] email

Email Content has a limit of 7000 characters.





# Lead Management Dashboard

# Lead Management Dashboard - Tasks

Main > Dashboard

My Custom Dashboards

Lead Management

03:09 PM

Tasks133

Leads732

Activity00

Guest Log00

Charlie Clubowner [4670167]

All Due Dates

All Lead Types

All Purposes

All Priority

search by name

Page Size

showing 1 of 1 match

Lead Name	Lead Type	Activity	Staff Name	Due Date	Priority
<div>WORK IT</div> Mrs Prospect	PT Training Prospect	Follow up Reminder	Charlie Clubowner	4/30/2018	No Priority

The **Tasks** tab will display all of the tasks created for membership prospects only. The number displayed to the left show tasks assigned to the staff member currently logged in. The number displayed to the right show tasks for all the club.

The screen will display a list of tasks with the **Lead Name**, **Lead Type**, **Activity** that needs to be completed, **Staff Name** assigned to the task, **Due Date** and **Priority**. Select the **WORK IT** button to add details and log the task as completed.

# Lead Management Dashboard - Leads

Main > Dashboard

My Custom Dashboards

Lead Management

03:13 PM

Tasks 1 33

Leads 7 32

Activity 0 0

Guest Log 0 0

Charlie Clubowner [4670167]

All Lead Types

All Referral Types

No Freshness Filter

Assigned

No Sales Contacted Filter

All Contact Methods

search by name

Unassigned

Page Size showing 7 of 7 matches

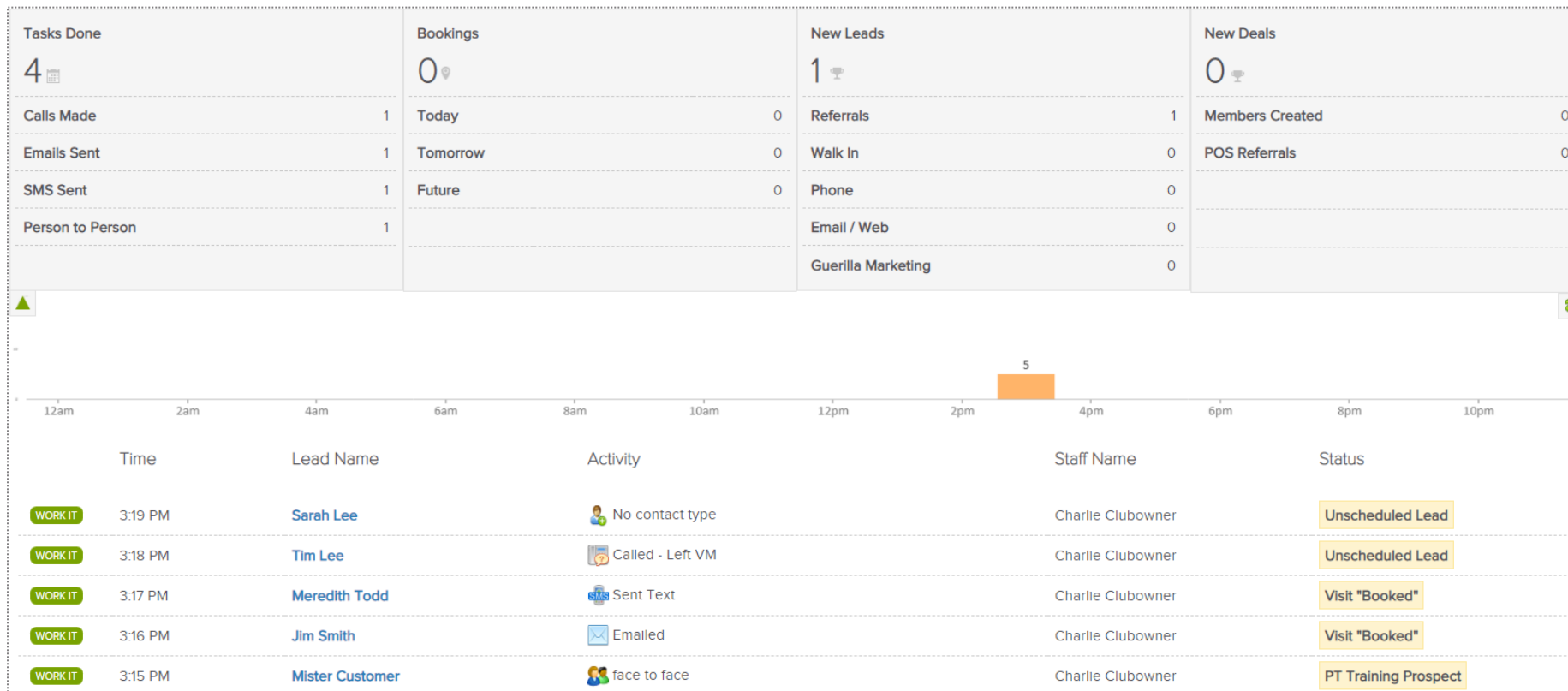
Lead Name	Lead Type	Referral Type	Contact Method	Entry Time	Contacts
<a href="#">WORK IT</a> Jason Smith	Unscheduled Lead	Flyer	Telephone Inquiry	Added 4 days ago	✓ 1 contact
<a href="#">WORK IT</a> Jon Martin	Visit "Booked"	Instagram	Telephone Inquiry	Added last month	✓ 1 contact

The **Leads** tab will display all of the leads added. The number displayed to the left show leads assigned to the staff member currently logged in. The number displayed to the right show all of the club's leads.

The screen will display a list with the **Lead Name**, **Lead Type**, **Referral Type**, **Contact Method**, **Entry Time** and **Contacts**. Click on **WORK IT** if you need to follow up with the lead and log the contact details.

# Lead Management Dashboard – Activity

Main > Dashboard

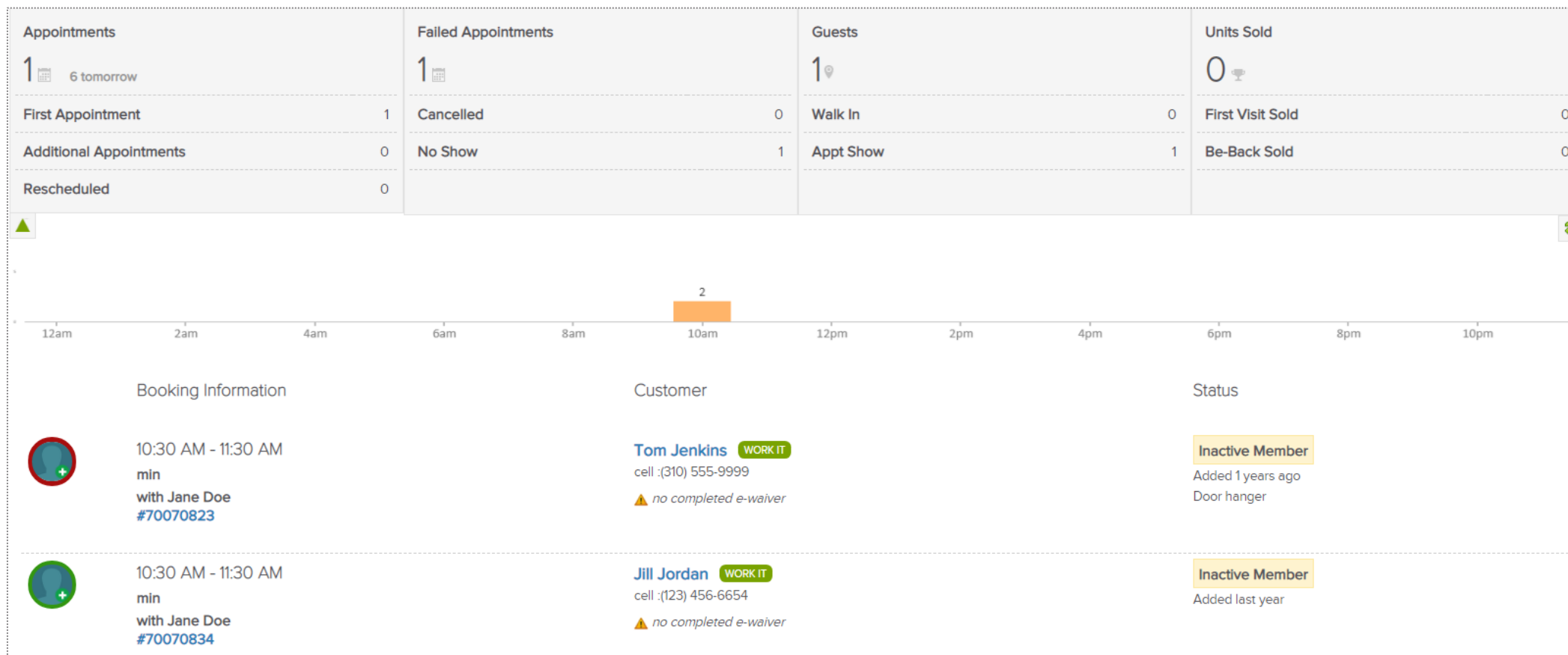


The **Activity** tab reflects current data or activity for a specific day. The report will display **Tasks Done**, **Bookings**, **New Leads** and **New Deals**. A time bar lets you know when are these activities happening throughout your club.



# Lead Management Dashboard – Guest Log

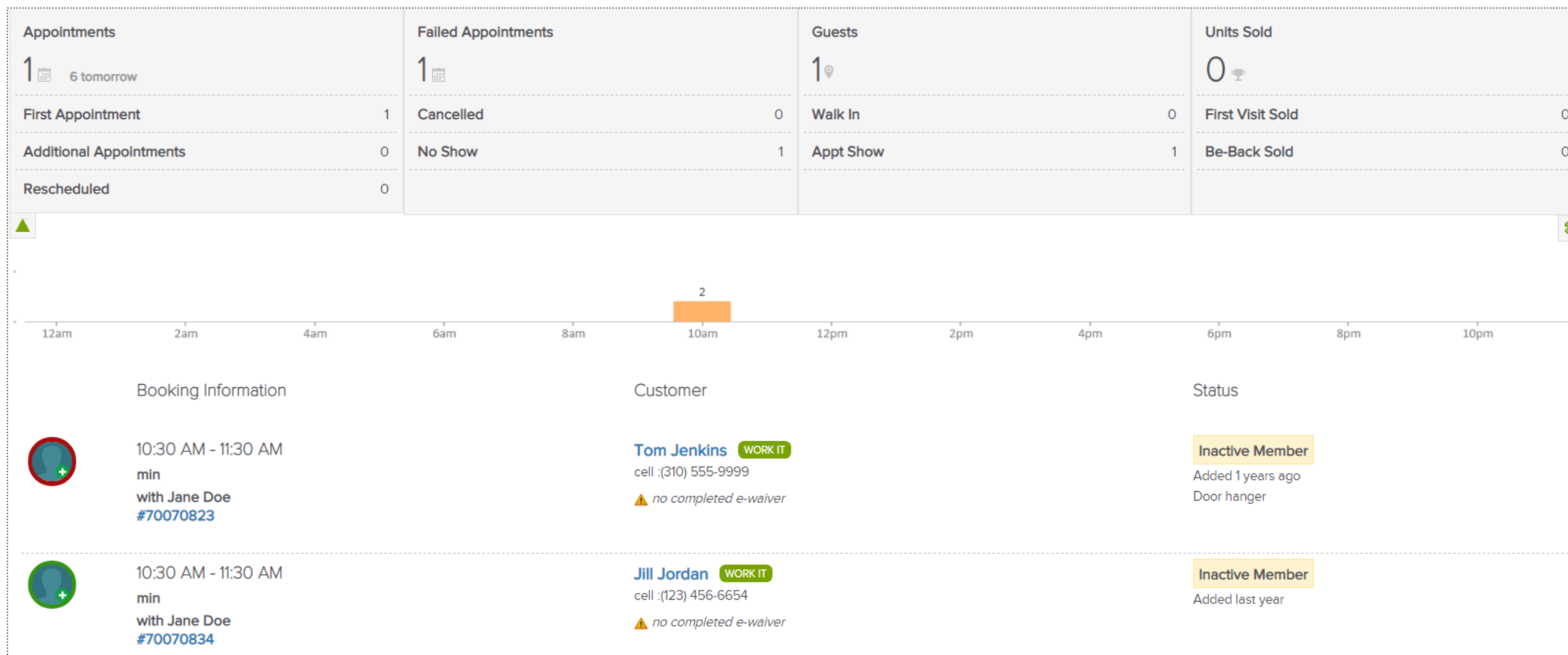
Main > Dashboard



The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments**, **Failed Appointments**, **Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.

# Lead Management Dashboard – Guest Log

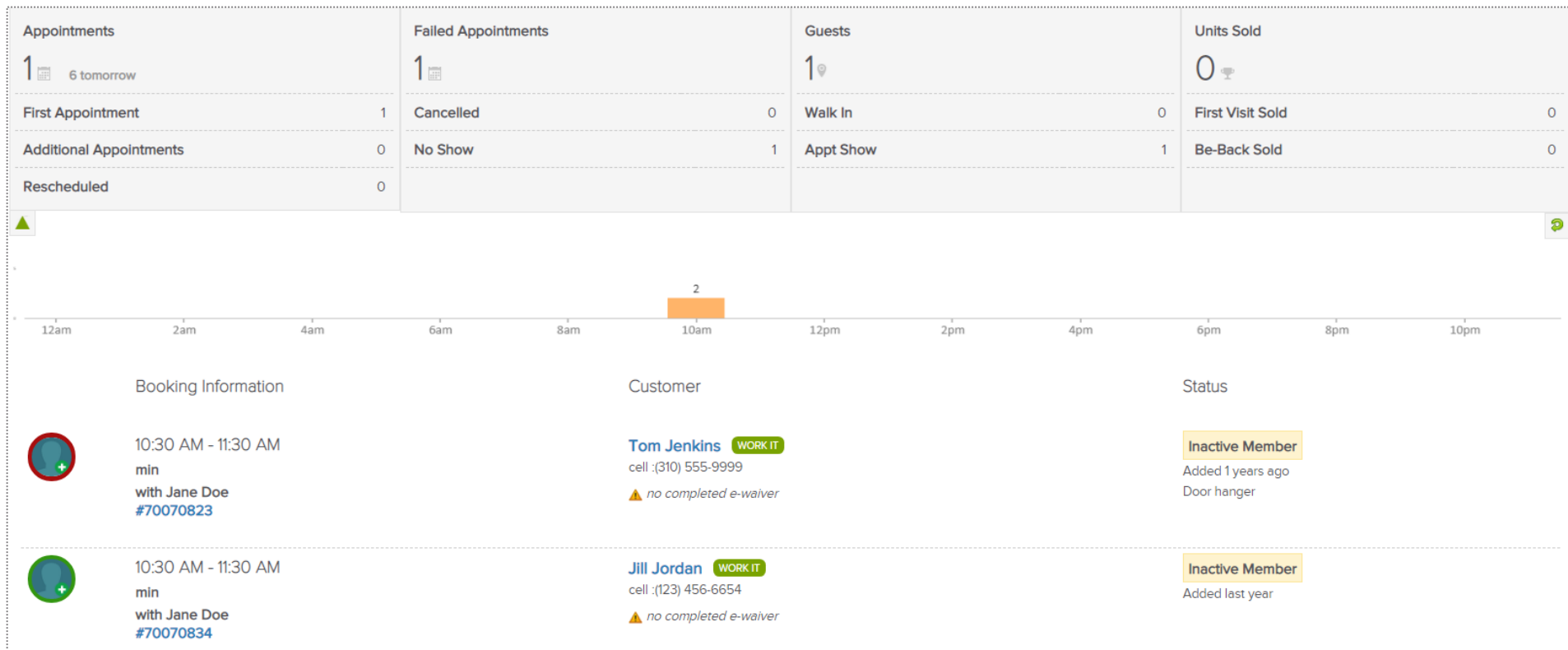
Main > Dashboard



The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments, Failed Appointments, Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.

# Lead Management Dashboard – Guest Log

Main > Dashboard



The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments**, **Failed Appointments**, **Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.

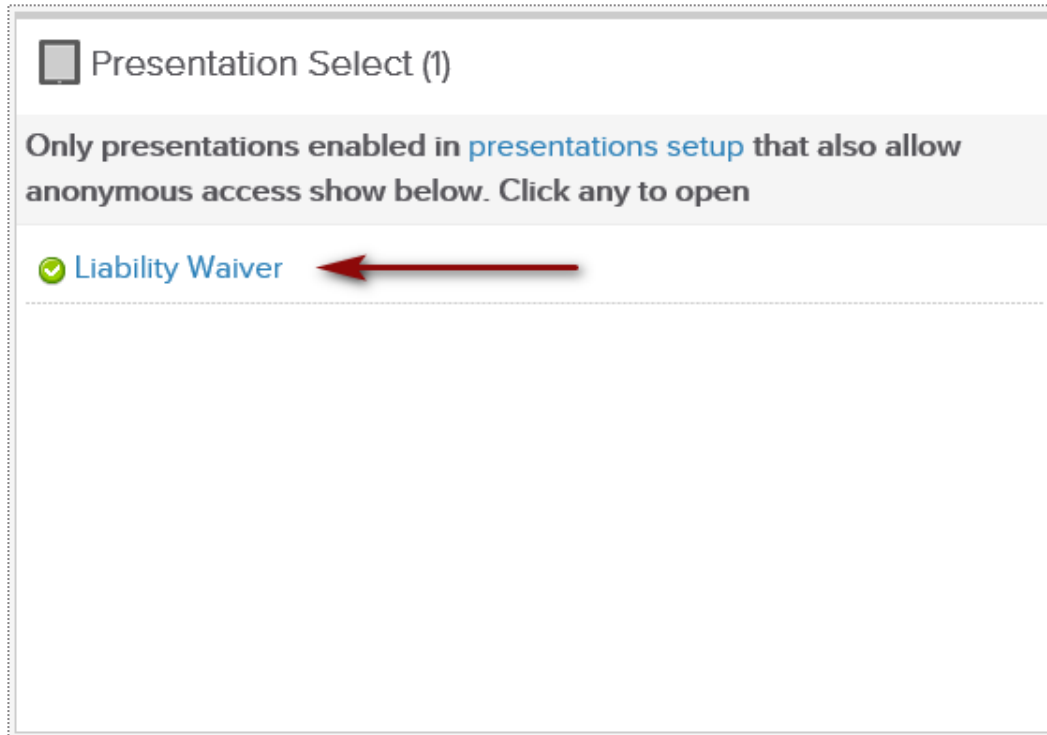


Waivers



# Entering a Prospect – Sign a Waiver

Adding in a Prospect who will be taking a Class



Click on **Main > Dashboard**. To begin a presentation (Liability Waiver) from the Presentations widget, select the blue presentation title.

You can choose to begin a presentation from a tablet by downloading the following app:

**ClubReady Presentation Viewer App -**  
<https://www.clubready.com/wiki/WK31559918315>

# Entering a Prospect – Sign a Waiver

Adding in a Prospect who will be taking a Class

My Club Guest Register

Liability Waiver

Waiver of Liability

Your Information

First Name

Last Name

Gender

Select Gender

Email Address

ASSUMPTION OF RISK, WAIVER AND INDEMNITY. I, the client, acknowledge that I know, understand and appreciate the inherent risks of participating in aerobic and athletic activities. I know that these risks range from minor injuries such as muscle strains and sprains to significant problems such as knee injuries or broken bones to the rare catastrophic events such as heart attacks, paralysis and death. I hereby assert that I am voluntarily participating in the activities and that I fully assume the inherent risks of such participation.

I certify that (1) I possess a sufficient degree of physical fitness to participate in aerobics and physical activity; (2) I understand that I am to discontinue activity at any time I feel undue discomfort or stress; and (3) I will indicate below any health concerns that might affect my ability to participate in the activities and I will verbally inform the instructor immediately.

In consideration of being permitted to participate in the activities at, I hereby release (on behalf of myself, my family, my heirs and my assigns) the Club, their respective employees, agents, successors and assigns from liability for any and all claims involving injury, death, or property loss suffered by me or any person entering the Club as my guest including those injuries which result from ordinary negligence of the Club, Club Franchising, LLC and their respective employees, agents or sponsors. This includes incidents that occur while participating in the activities, while using the Club facilities, or while engaging in any activities incidental thereto, wherever, whenever, or however the same may occur.

I further agree to hold harmless, defend and indemnify the Club and from any and all claims (including ordinary negligence of Club, or their employees or agents) arising directly or indirectly from my participation in the activities. I further agree to pay all costs and attorneys' fees incurred by Club in investigating and defending a claim brought by me or on my behalf by my heirs, personal representatives or assigns, or by a third party.

Parent/Guardian: In exchange for Club allowing my minor child to use the Club, I agree to the Assumption of Risk, Waiver and Indemnity clause in this Agreement. I also agree to defend and indemnify Club, or its officers and employees to the fullest extent permitted by law for any claim brought by my minor child against them. I also promise to pay any financial obligation incurred by my minor child for any reason and acknowledge that the banking information provided is my account. I understand that any child of mine under the age of 16 must be accompanied by an adult at all times while in a location

Customer agrees and acknowledges that various aspects of Club's business are protected intellectual property belonging exclusively to club. This intellectual property shall include, but not be limited to, the distinctive nine-round workout will demonstrate to Customer, the distinctive appearance, layout, stations, and look and feel of the location Customer is invited to view and participate in, as well as any copyrights, trademarks, designs, logos, or trade dress related thereto. Customer acknowledges that club's business and franchising model depends on the protection and enforcement of club's intellectual property throughout the United States and other areas where it may offer and advertise services. As a result, and in further consideration of the services being offered to Customer by club and club's disclosure and demonstration of intellectual property to Customer, Customer agrees not to copy, duplicate, photograph, record, reproduce, distribute, republish, perform, display, post, transmit, sell, or make into derivative works or substantially similar works or formats, in any form or by any means, including, but not limited to, electronic, mechanical, photocopying, recording, or otherwise, club's intellectual property without the express, written permission of club

What is your goal?

☐ I agreed to the terms

Please sign here

NON  
SIGNED

SIGNATURE 1

click to sign


A pop-up window will automatically display with the waiver for the prospect to sign. Once all fields have been entered and signatures taking, select **Submit**. The prospect will now be listed in ClubReady under the **Prospects** tab.






# Prospect Management / Tasks

# Entering a Prospect

Adding in a Prospect Who Calls the Club or Has Not Scheduled A Booking Yet

 **Add A New Prospect To Training Team Sandbox** REQ = Required Field

Gender <small>REQ</small>	<input type="radio"/> Male <input type="radio"/> Female
<input checked="" type="checkbox"/> include in duplicate search	
First Name <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Last Name <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Email Address (important) <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Cell Phone	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Home Phone	<input type="text"/>
Work Phone	<input type="text"/>
 Key Info Note  <i>(this is never visible to the prospect)</i>	<input type="text"/>
Referred by Customer	<input type="text"/> start typing (at least 3 characters) to select from list
Heard About Club How?	Select How They Heard <input type="button" value="v"/>
Lead Type <small>REQ</small>	Select A Prospect Type <input type="button" value="v"/>
 Email Is Sent?	<input checked="" type="checkbox"/> Yes - <a href="#">New Prospect Email</a> email template is used <a href="#">info about this</a>
ClubReady Login Available? <small>REQ</small>	Select <input type="button" value="v"/>

Click on **Prospect > Add New Prospect**. Any fields with the REQ icon will have to be completed to save your prospect.

# Access the Work It

## Prospects/Members tab > Tasks

Detail

Agreements (1)

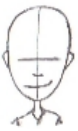
Bookings (0)

Notes (8)


Files (2)


Tasks (1)


Past 30 Days





**Mr Customer** [9679922] Male  
Amenities None


  
WORK IT


  
GO POS


  
NEW DEAL


  
BILLING


  
BOOKINGS


  
PRESENT

  
PROFILE

  
WELLNESS

  
LOGIN AS

  
ALL DETAIL

  
LEAD HIST.

OR

Tasks (180)


Email

Text (SMS)

Phone

Postal Mail

Map



**Tasks For Customers**

Show all customer tasks  
click to filter tasks by team member assigned

180

5

6

7

8

9

10

11

12

13

14

15

done today by you 0

by all the team 0

180 tasks currently due - above is this week and next - double click names & dates to edit

☐

WORK IT

Mr Customer


Send SMS to client

Tracy T

11/14/2016

No Priority

# Work It – Phone Calls

 Mr Customer

No Lead Type


more options for Mr


Contact


Sales Scripts


Fast Book

+ add task

 Make A Phone Call

 Send An Email

 Send An SMS

 Person to Person

Cell number(123) 456-7890

Home number(123) 456-7890

Work numberUnknown

Select The Outcome Of The Call

enter details of call..

Internal Sales (eg PT)

Do not add a new call task

Log The Phone Call

Past Calls (1)

Key Note (0)

All Notes (9)


Lead Type History


Last Calla few seconds ago by Jacqueline Armstrong


Last Talked Witha few seconds ago by Jacqueline Armstrong

Calls Last 30 Daysnone

hide any with no phone conversation


 Jacqueline Armstrong a few seconds ago (1/3/2017)

 talked - positive conversation

 Made a booking!

The **Make A Phone Call** tab will show the client's contact numbers, last call information, and a chronological history of the calls.

# Work It - Contact

 Mr Customer

No Lead Type

more options for Mr

Contact

Sales Scripts

Fast Book

+ add task

Make A Phone Call

Send An Email

Send An SMS

Person to Person

Cell number(123) 456-7890

Home number(123) 456-7890

Work numberUnknown

Select The Outcome Of The Call

enter details of call..

Internal Sales (eg PT)

Do not add a new call task

Log The Phone Call

Past Calls (0)Key Note (0)All Notes (8)Lead Type History

Last Callnone yet

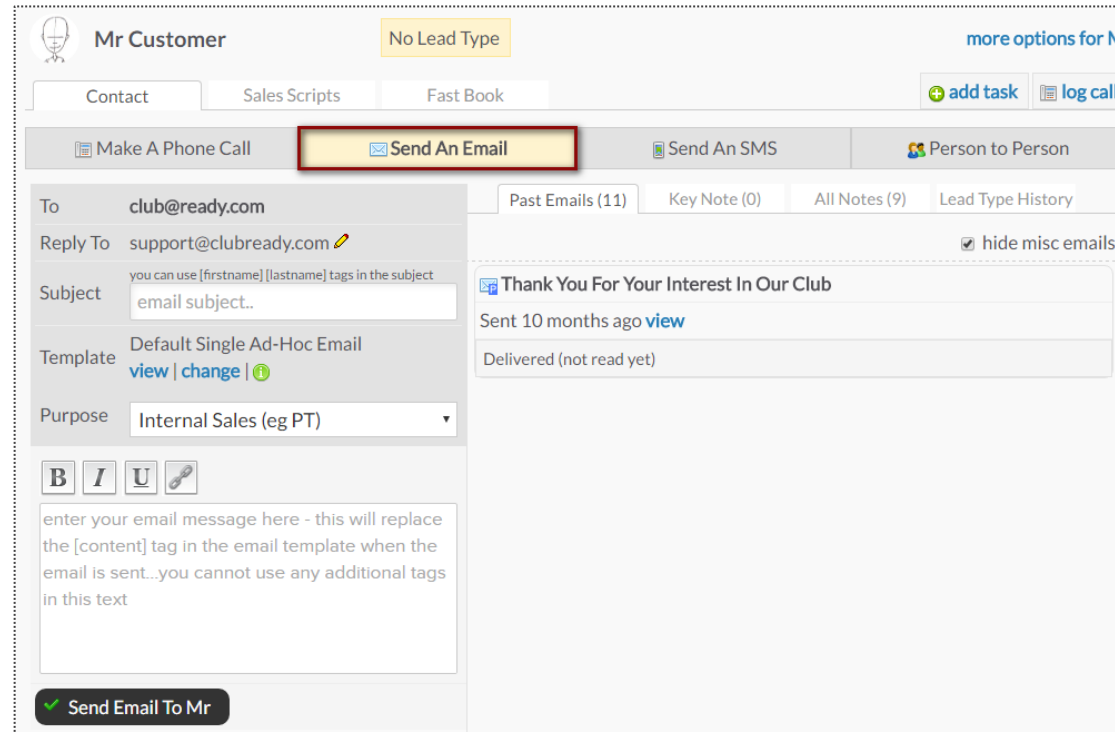
Last Talked Withnever by phone

Calls Last 30 Daysnone

☐ hide any with no phone conversation

The **Contact** tab provides different contact methods that can be taken for your Prospects and Members. The options include logging phone calls, sending an email, sending an SMS (text) message, and logging person to person contact.

# Work It – Emails



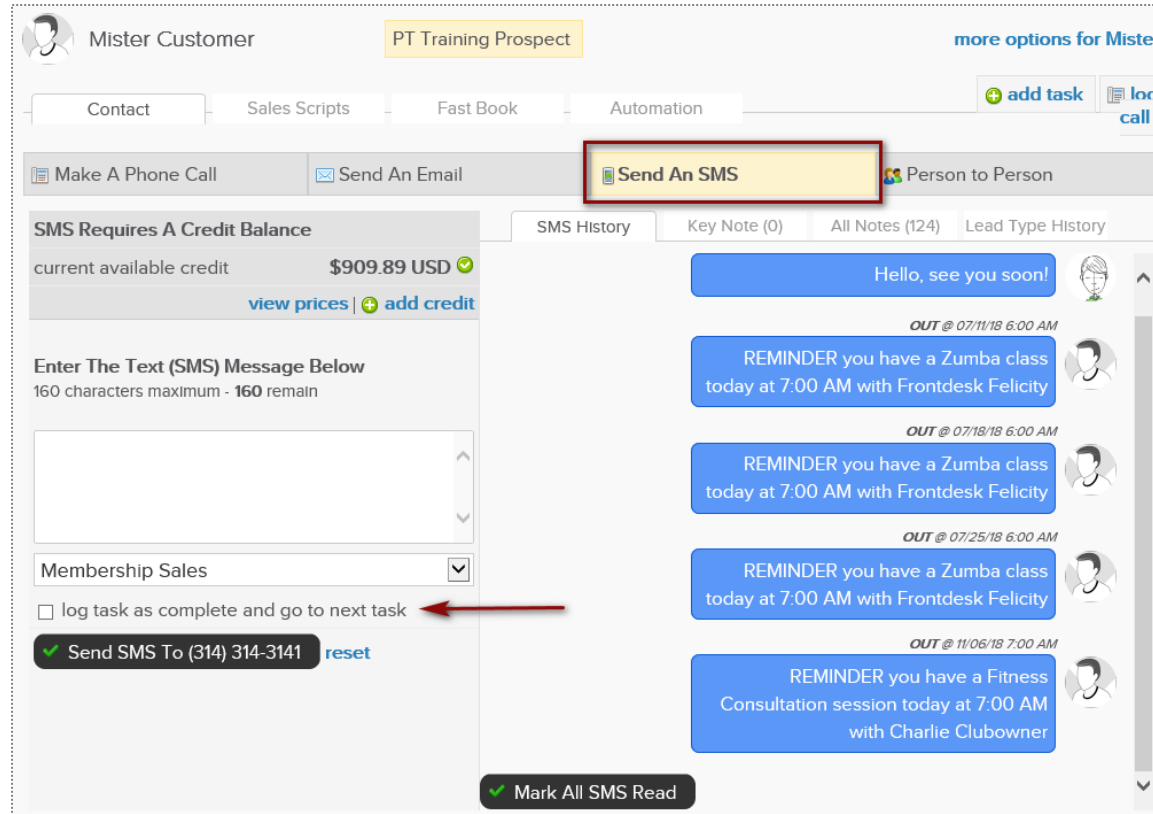
The screenshot shows a user interface for sending an email to a client named 'Mr Customer'. The interface is divided into several sections:

- Header:** Displays 'Mr Customer' with a profile icon, 'No Lead Type', and a link for 'more options for Mr Customer'.
- Navigation:** Includes tabs for 'Contact', 'Sales Scripts', and 'Fast Book'. Action buttons for '+ add task' and 'log call' are also present.
- Primary Actions:** A row of buttons includes 'Make A Phone Call', 'Send An Email' (highlighted with a red box), 'Send An SMS', and 'Person to Person'.
- Email Composition Form:**
  - To:** club@ready.com
  - Reply To:** support@clubready.com
  - Subject:** A text field with a placeholder: 'you can use [firstname] [lastname] tags in the subject email subject..'.
  - Template:** 'Default Single Ad-Hoc Email' with links to 'view' and 'change'.
  - Purpose:** A dropdown menu set to 'Internal Sales (eg PT)'.
  - Rich Text Editor:** Includes bold (B), italic (I), underline (U), and link icons. Below them is a text area with the instruction: 'enter your email message here - this will replace the [content] tag in the email template when the email is sent...you cannot use any additional tags in this text'.
  - Send Button:** A green button labeled 'Send Email To Mr'.
- Email History:** On the right side, there are tabs for 'Past Emails (11)', 'Key Note (0)', 'All Notes (9)', and 'Lead Type History'. A checkbox for 'hide misc emails' is checked. Below these is a list of email history items:
  - Item 1:** 'Thank You For Your Interest In Our Club', 'Sent 10 months ago', with a 'view' link.
  - Item 2:** 'Delivered (not read yet)'.

The **Send An Email** tab allows you to make contact with the client through email. The right side of the screen will show a history of email correspondence between the client and staff member.



# Work It – SMS (Text Messages)




The screenshot shows the 'Send An SMS' interface for a client named 'Mister Customer' (PT Training Prospect). The interface includes a sidebar with tabs for 'Contact', 'Sales Scripts', 'Fast Book', and 'Automation'. The 'Send An SMS' tab is highlighted with a red box. Below the tabs, there are buttons for 'Make A Phone Call', 'Send An Email', and 'Send An SMS' (highlighted with a red box). The 'Send An SMS' section displays the current available credit (\$909.89 USD) and a button to 'view prices' or 'add credit'. It also shows a text input field for the message, a dropdown menu for the subject (currently 'Membership Sales'), and a checkbox for 'log task as complete and go to next task' (indicated by a red arrow). A 'Send SMS To (314) 314-3141' button is visible, along with a 'reset' link. The main area shows a list of sent SMS messages, including a 'Hello, see you soon!' message and several 'REMINDER' messages for Zumba and Fitness Consultation sessions. A 'Mark All SMS Read' button is at the bottom.


Mister Customer PT Training Prospect [more options for Mister](#)


[Contact](#) [Sales Scripts](#) [Fast Book](#) [Automation](#) [+ add task](#) [log call](#)


[Make A Phone Call](#) [Send An Email](#) **[Send An SMS](#)** [Person to Person](#)

**SMS Requires A Credit Balance**  
current available credit **\$909.89 USD**   
[view prices](#) [+ add credit](#)


**Enter The Text (SMS) Message Below**  
160 characters maximum - 160 remain


Membership Sales 


☐ log task as complete and go to next task 


 Send SMS To (314) 314-3141 [reset](#)


[SMS History](#) [Key Note \(0\)](#) [All Notes \(124\)](#) [Lead Type History](#)


**OUT @ 07/11/18 6:00 AM**  
Hello, see you soon! 

**OUT @ 07/11/18 6:00 AM**  
REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity 

**OUT @ 07/18/18 6:00 AM**  
REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity 


**OUT @ 07/25/18 6:00 AM**  
REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity 

**OUT @ 11/06/18 7:00 AM**  
REMINDER you have a Fitness Consultation session today at 7:00 AM with Charlie Clubowner 

 Mark All SMS Read


The **Send An SMS** tab allows you to send a text message to your client as well as view any past texts.


# Work It – Person to Person


 **Mr Customer** No Lead Type [more options for Mr](#)


ContactSales ScriptsFast Book

[+ add task](#)

 Make A Phone Call

 Send An Email

 Send An SMS

 **Person to Person**

Cell number(123) 456-7890

Home number(123) 456-7890

Work numberUnknown

Select The Outcome Of The Contact

enter details of contact..

Internal Sales (eg PT)


Do not add a new contact task


Log The Contact


Past Contacts (1)Key Note (0)All Notes (11)Lead Type History

Last Talked Withjust now by Jacqueline Armstrong

Talks Last 30 Days1 times


 Jacqueline Armstrong just now (1/3/2017)

 talked - positive conversation

 Super nice!

The **Person to Person** tab will show the clients contact numbers, last face to face contact and a chronological list of interactions on the right side of the screen.

# Work It – Sales Scripts

 **Mr Customer** No Lead Type [more options for Mr](#)

Contact **Sales Scripts** Fast Book + add task log call

Book That Prospect ▼

Hi there. My name is \_\_\_\_\_, and I'm a personal trainer here. Are you new to the club?

I thought so. How exciting!

Well, welcome to the club, \_\_\_\_\_. Hey, I know when you first join a new club, you sometimes have questions about the equipment, where things are, or proper club etiquette. I'd love to take you through a complimentary tour—all new members get one.

Have you always exercised, or are you just getting started?

Do you have any injuries?


What are your goals?

Why don't I book you for some time in the next few days to get you started off on the right foot?




Great!


Scripts can help narrate a call between a client and staff member. Select the desired script from the drop-down in the top left corner and the content will appear below for the employee to follow.

# Work It – Fast Book

 Mr Customer No Lead Type [more options for Mr](#)





Contact Sales Scripts **Fast Book** + add task log call

 **Consults**  **Services**  **Classes**

 Mr Customer No Lead Type [more options for Mr](#)

Contact Sales Scripts **Fast Book** + add task log call

**Consults** Services Classes

 Main Event	60m	0
 Corp PT Sales Consult	15m	30m
 Fitness Consult 30min	30m	
 Consult - on the hour	60m	

The **Fast Book** tab allows you a fast and easy way to book your client into **Consults**, **Services** or **Classes**. Simply select the type of service you wish to book as well as the duration.

# Work It – Fast Book

Mr Customer No Lead Type [more options for Mr](#)

Contact Sales Scripts **Fast Book** [add task](#) [log call](#)

**Consults** Services Classes

**Fitness Consult 30min** 30m

☒ All Day ☐ Morning ☐ Afternoon ☐ Evening With All Staff Members

Wed	Thu	Fri	Sat	Sun	Mon	Tues
4th	5th	6th	7th	8th	9th	10th
11th	12th	13th	14th	15th	16th	17th
18th	19th	20th	21st	22nd	23rd	24th

[go to full scheduling grid view](#) consult chances of showing up **avoid** **best**

Once you've selected the type of service, you can then select the client's preference for a morning, afternoon or evening appointment, as well as the trainer.

Mr Customer No Lead Type [more options for Mr](#)

Contact Sales Scripts **Fast Book** [add task](#) [log call](#)

**Consults** Services Classes

**Fitness Consult 30min** 30m



**Tuesday, January 10** [choose a different date](#)

☒ Apply booking rules ☐ Only show times consult most likely to show

Morning	Afternoon	Evening
6:00 AM with Tracy Trainer	12:15 PM with Test Demo	6:15 PM with Tracy Trainer
6:00 AM with John Adams	12:15 PM with Tracy Trainer	6:15 PM with John Adams
6:15 AM with Tracy Trainer	12:15 PM with John Adams	6:30 PM with Tracy Trainer
6:15 AM with John Adams	12:30 PM with Test Demo	6:30 PM with John Adams

[go to full scheduling grid view](#) consult chances of showing up **avoid** **best**

# Work It – Automation

 **Mister Customer** Club Tour No Show  [more options for Mister](#)

Contact Sales Scripts Fast Book Automation + add task log call



Upcoming (7)

History (33)

Apt No Show Day 14 Text	08/17/2018 (1 days left)
Apt No Show Day 30 Email	09/02/2018 (17 days left)
Apt No Show Day 60 Email	10/02/2018 (47 days left)

The **Automation** tab allows you to keep track of the Automation Rules that are associated with the prospect/member you are working with. You are able to view **Upcoming** and **History** of rules.

**Upcoming** tab will display Automation Rules that will be completed for the client in the future and when.

 **Mister Customer** Club Tour No Show  [more options for Mister](#)

Contact Sales Scripts Fast Book Automation + add task log call

Upcoming (7)

History (33)

Apt No Show Day 12 Email	08/15/2018 (0 days ago)
Apt No Show Day 10 Call	08/13/2018 (2 days ago)
Apt No Show Day 7 Text	08/10/2018 (5 days ago)

**History** tab will show a list of all Automation Rules that have been completed for this client. The list will include the date it was triggered and how many days ago it was.

# Widget – Unread Incoming SMS

Main > Dashboard

☒ Unread Incoming SMS Messages (3)

All Staff

Garrett Anderson

WORK IT

Mickey Mouse

WORK IT

Fred Jones

WORK IT

SMS HistoryKey Note (0)All Notes (18)Lead Type History

OUT @ 11/16/17 11:19 AM

Thank you scheduling your PT session.  
When would you like to schedule your next session?

IN from (314) 443-2471 @ 11/16/17 11:19 AM

Can we do a session tomorrow at 4pm?

**All Staff Dropdown Menu** - This will show you all of your staff members. You will be able to view the texts that are replies to a specific staff member or across all staff.

**Select Customer** - if you click the customer name in blue from your list, you will be taken to the customer's profile all detail view.

**Work It** - By clicking on the **Work It** button, you will be able to access the work it tool. This will take you directly the **Send SMS (Text Message)** option, where you will see the history of texts.

To confirm that you have read the new message, and remove this customer from your Unread SMS widget list, click **Mark All SMS Read**.

# Creating & Editing Sales Scripts

Setup > Leads > Sales Scripts

Book That Prospect!!

TITLE

**B**

*I*

U



Hi there. My name is \_\_\_\_\_, and I'm a personal trainer here. Are you new to the club?

I thought so. How exciting!

Well, welcome to the club, \_\_\_\_\_. Hey, I know when you first join a new club, you sometimes have questions about the equipment, where things are, or proper club etiquette. I'd love to take you through a complimentary tour—all new members get one.

Have you always exercised, or are you just getting started?

Do you have any injuries?

What are your goals?

Why don't I book you for some time in the next few days to get you started off on the right foot?

Great!

Enter the name of the new Sales Script and click **Create A New Sales Script**.

This page will appear after a new Sales Script has been created or by clicking the edit pencil next to an existing Sales Script.

Using the options that are very similar to Word you may create or edit your Sales Script.

When finished click **Update Sales Script**.










# Communications

# Create Announcement

Setup > Communications > Announcements

Announcement Title	<input type="text"/>
Shows To Who	Select Who Should See It ▾
Always Show Announcement	<input type="checkbox"/>
Start Date	<input type="text"/> <small>(if blank announcement will start immediately)</small>
End Date	<input type="text" value="4/2/2015"/> <small>(if blank will always show to relevant users who have not seen it yet - even new staff added months later - you should typically always include an end date)</small>
Include a Poll? <small>(the poll question should be in the announcement title or text)</small>	<input type="radio"/> Yes <input checked="" type="radio"/> No
The Announcement <small>note - you can use the tag {firstname} and it will get replaced by the first name of the person who reads the announcement note - you can use the tag {daysUntil(date)}, replacing {date} with a valid date, and it will be replaced with the number of Days between the current date and the given date</small>	<div><div>TITLE B I U     </div><div><small>Note - This WYSIWYG editor is a HTML5 editor - which is not supported by Internet Explorer 9 and below. Use a more modern browser such as Chrome / Firefox or IE 10+</small></div><div><div></div></div></div>
Include Acknowledgement Text / Checkbox <small>If this is included then text tied to a checkbox is added to the end of the announcement and the announcement cannot be closed until the checkbox is selected.</small>	<input type="checkbox"/>
Display in Past Announcements Page	Show In Archive Page Forever ▾

**Announcement Title** - Enter the title for your announcement, this will be what the client or staff member will see when they log in.

**Shows To Who** - Select whether you want this announcement to show to Customers or Staff Members. You can target all staff or specific staff types.

**Always Show Announcement** - This option will have the announcement show to your customers or staff every time they log into the site.

**Start Date** - Enter the date you wish the announcement to start appearing. Leaving this field blank will cause the announcement to appear to staff or customers immediately.

**End Date** - Type in an end date for your announcement to quit appearing to staff or customers.

**Include a Poll** - Select whether you want to poll your clients or staff. If you click Yes the yellow box will appear where you can enter 4 choices.

**The Announcement** - Type in the actual announcement content. This section works like a basic word processor.

**Include Acknowledgement Text/Checkbox** - Check the acknowledgment box if you want to force staff to read (not just close) an announcement and confirm they have read it.

**Display in Past Announcements Page** - Select what archive settings you want for this announcement.

# View Previous/Future Announcements

Setup > Communications > Announcements

Active (1)		Future (0)		Inactive (1)	
Announcement Title	Report	Includes Poll?	Start Date	End Date	
10% Off All Spring Apparel (1 views) 		No	3/26/2015	3/29/2015	

**Active** - Announcements after being created.

**Future** - Future date announcements

**Inactive** - Announcements that have gone past their end date tab.

If you wish to delete or cancel an announcement click the red X button to the right of the announcement title.



# Create New Discussion

Setup > Communication > Discussion Categories

### Add A New Discussion Category

Name of New Category *(new additions will initially be set to disabled)*

*eg General Chat*

Category Description (Optional)


☒ Customers Can View / Participate In Category

☒ Trainers Can View / Participate In Category


Add The New Category



Discussion categories allow your customers and/or staff to hold conversations in the form of posed messages. When creating a new discussion category, add the name and choose if customer and/or trainers can participate in this forum.

# View Discussions: Staff & Clients

 **Community Discussion**


[Discussion Home](#) > What is your favorite workout?




Discussion Subjects In What is your favorite workout?	Last Post	Replies	Views
 <a href="#">Treadmill!</a> 	By JacquelineCR Friday, November 11, 2016 10:15 AM	0	7


Staff View – **Reports > Community.**

Trainers can participate by clicking on the Add New Discussion button in the discussion forum they select.


 **Community Discussion**

 **My Discussion Settings**

☒ Show My Photo  
☐ Don't Show My Photo  
  
☐ Use My Real Name In Posts  
☒ Use My Username [edit](#)

 [outside workouts](#) 2 Discussions  
Post your Outdoor workouts  

---

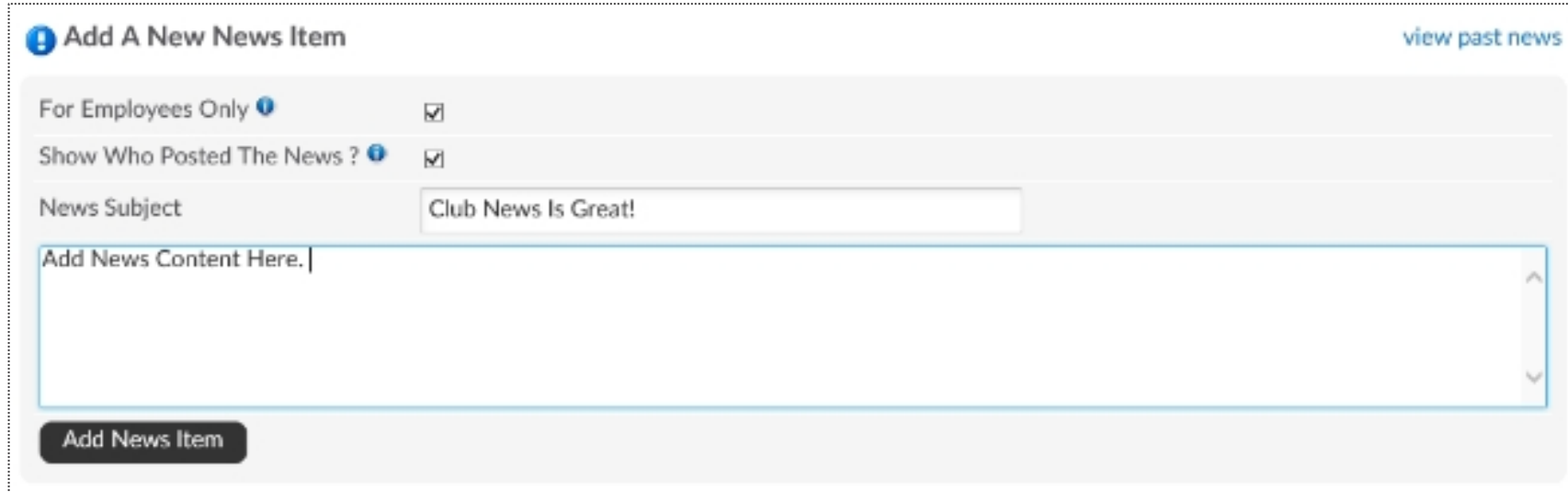
 [Favorite Post Workout Meal](#) 2 Discussions

Client View – **Discuss > Community Discussion.**

Clients can view all available forum and select their discussion settings. To add a new discussion, they need to select on the forum link and Add New Discussion.

# Create Club News

Main > Club News



The screenshot shows a web form titled "Add A New News Item" with a blue information icon. In the top right corner, there is a link that says "view past news". The form contains two checkboxes: "For Employees Only" and "Show Who Posted The News ?", both of which are checked. Below these is a text input field for "News Subject" containing the text "Club News Is Great!". Underneath the subject field is a large, empty text area for "Add News Content Here.". At the bottom left of the form is a dark button labeled "Add News Item".

To add a new club news item, click on the link Add New News Item which is located in the far right of the Club News tab.









**For Employees Only** – if checked, members will not see the news. If you are creating a news post that will be visible to members, they will be able to view this on their wellness dashboard.

**Show Who Posted The News** – will show the employee's name and photo.

**News Subject** – type the subject line and content you want to share. To complete, click on Add News Item.


# View Club News: Staff & Clients

Main > Club News

Past News Items <a href="#">add new news item</a>			
Date	News Item - Click To Read	For Employees Only?	Delete
10/10/2014	Mercy's Class 10/14/2014 10:00 AM CANCELLED 		
8/20/2014	New News 		
6/4/2014	Hola amigo! 		
6/2/2014	Hello there. 		

Staff View – Main > Reports.

Trainers can view news item as well as edit them and delete (if they have the permissions).

! Latest News	
11/11/2016 - <a href="#">Gym Expansion!</a>	
9/6/2016 - <a href="#">Fundamentals of Yoga 9/6/2016 9:00 AM CANCELLED</a>	
8/24/2016 - <a href="#">Bathroom Reno</a>	
 <a href="#">view all news</a>	

Client View – Home > Overview

Clients can view all available news items. To view past news they can select Home > Past News. Clicking the news link will show the content.

# Create A File Folder

Setup > General > File Folders

### Create A New File Folder

Folder Name

folder name

Choose A Parent Folder.

Root Level (No Parent) ▼

Select Who can See The Folder.

Select Who Should See It ▼

Create New File Folder

**Folder Name:** Type in the desired name for the file folder.

**Choose A Parent Folder:** If the folder being created is a sub folder of an existing folder, select the name of the parent folder. If not, leave select as **Root Level (No Parent)**.

**Select Who Can See The Folder:** Select if members or staff are able to see the folder.



# Upload A File To A File Folder

Setup > General > File Folders



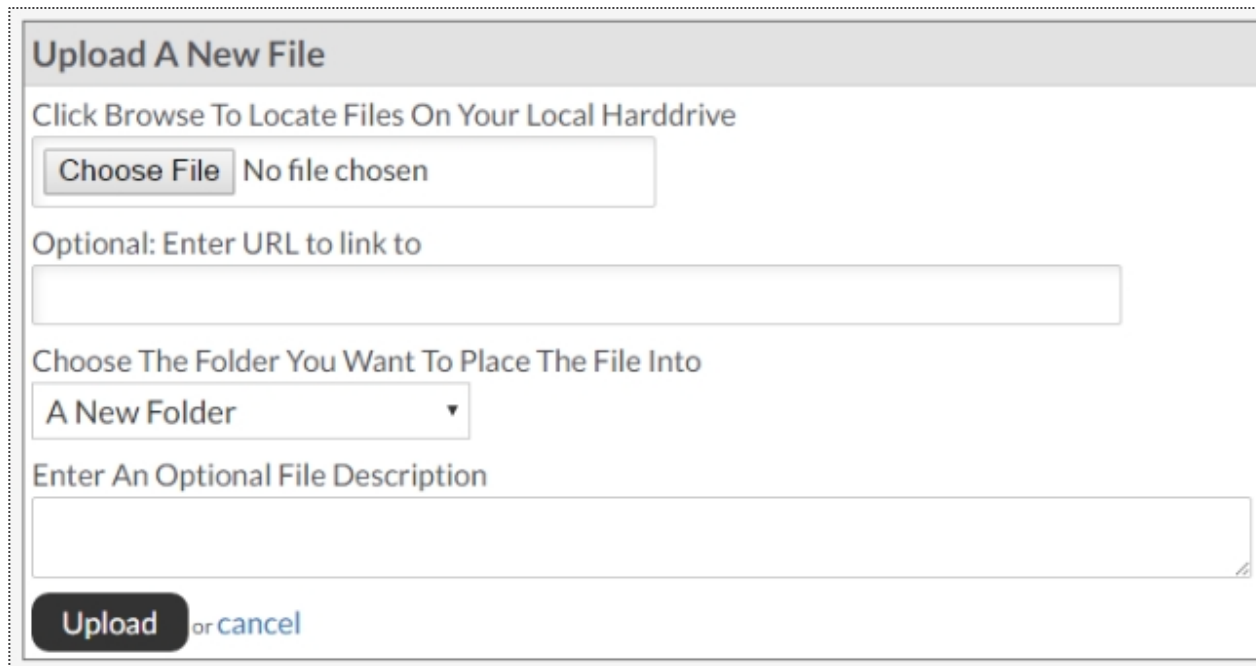
Club File Storage

[Upload A New File](#)

Change File Folder Delete File

File Name Uploaded By Date Size

To upload a file, select the **Upload A New File** link.



**Upload A New File**

Click Browse To Locate Files On Your Local Harddrive

[Choose File](#) No file chosen

Optional: Enter URL to link to

Choose The Folder You Want To Place The File Into

A New Folder

Enter An Optional File Description

[Upload](#) or [cancel](#)

Click the **Choose File** button to search and select the desired file from your PC. There is an option to enter a URL link (this is not recommended as if someone removes the file from their site it will no longer be available). Select your file, then select the folder you wish the file to be stored in. You may also enter an optional file description. Finally, click **Upload** to upload the file.

# Important Files Widget











Setup > Staff > Files Widget

### Add A File To The Files Dashboard Widget

Select A File Category

▼






There are no files in this folder

Current Files Shown On The Files Dashboard Widget (5)		
 <a href="#">Yummy Recipe</a>	13 KB	
 <a href="#">Black Friday Special_[1]11-24-2015.jpg</a>	217 KB	
 <a href="#">LetsDoThis.png</a>	26 KB	
 <a href="#">Gym FAQ</a>	82 KB	
 <a href="#">Employee_Handbook.pdf</a>	82 KB	

The files dashboard widget allows you to place specific files from your file store onto staff members dashboards. From the dropdown menu choose the folder, then the specific file. You do have the option to re-name the file for display in the widget. Click the **Add Selected File To Widget** button to save.

Staff members are able to access files from the widget by clicking the blue file name link.

### Important Club Files

 <a href="#">Yummy Recipe</a>
 <a href="#">Black Friday Special_[1]11-24-2015.jpg</a>
 <a href="#">LetsDoThis.png</a>
 <a href="#">Gym FAQ</a>
 <a href="#">Employee_Handbook.pdf</a>



# Email Templates

Setup > Communications > Email Templates

Active (4) Archived (0) **+ Add New**

All system (emails like notifications, reminders, payment receipts and so on) to your clients and templates, which can be rich HTML emails that contain data tags. Add new templates below or You can [assign templates to corporate level system email defaults](#)

Enter A Name For A New Email Template (eg New Booking Email)

**Big Sale!**

CREATE A BLANK TEMPLATE

**CLONE AN EXISTING TEMPLATE**

CLONE A SYSTEM DEFAULT

CLONE A NEWSLETTER TEMPLATE

These are the templates you have created (or have been created e templates

New Member Day 14 [Corp]  
Open New Prospect Email [Corp]  
Presale Email [Corp]  
Presale New Prospect Email [Corp]

**Add The New Email Template**

Click on the **+ Add New** tab to choose from the 4 ways to create a custom template:

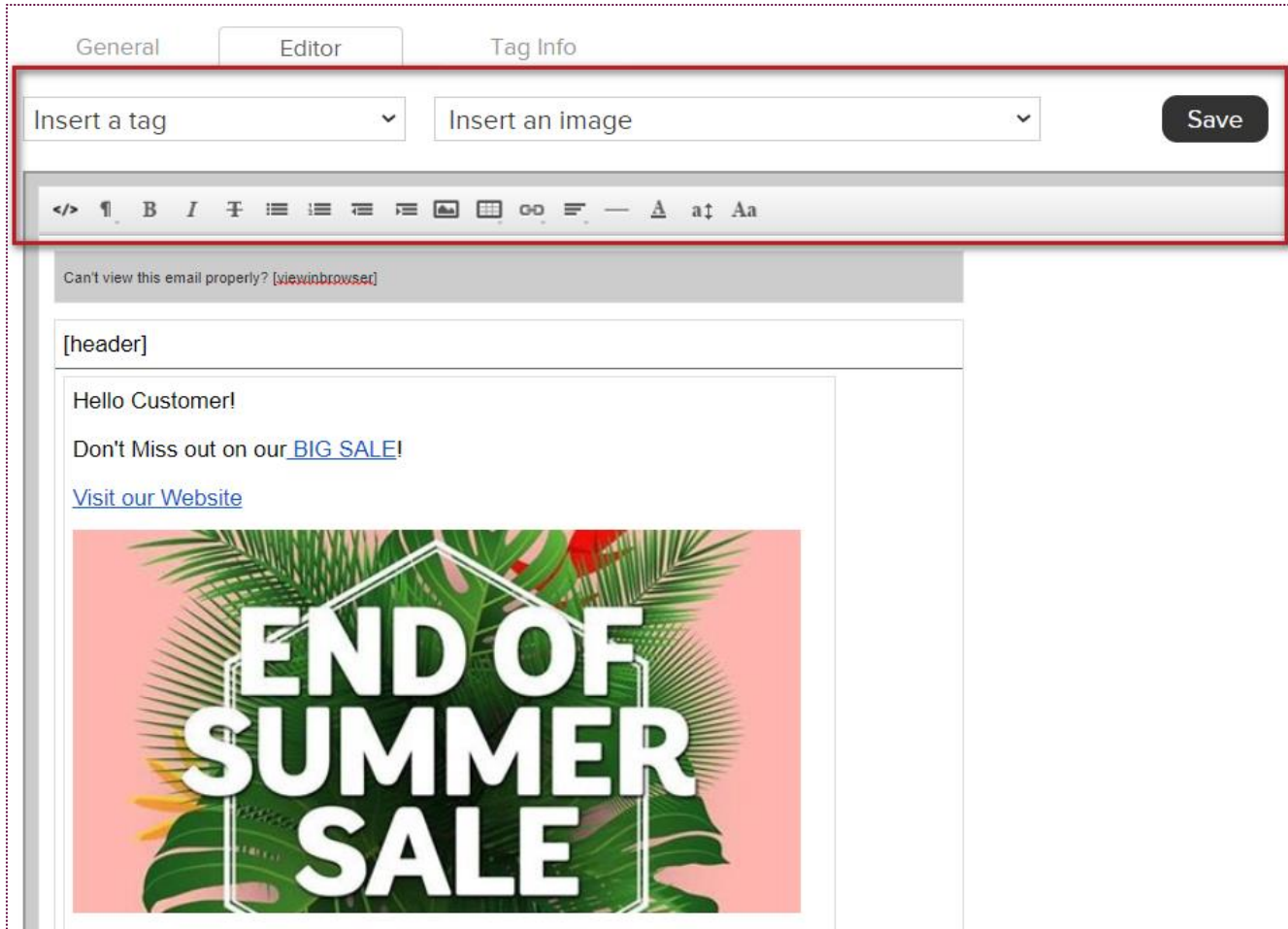
**Create a blank template, Cloning an existing template, Cloning system default template or Clone a newsletter template**

Type the name of your new template and click on the button **Add The New Email Template** to save and continue.



# Email Templates

Setup > Communications > Email Templates



Click on the **Editor** tab to proceed adding the content for your email template.


Choose from **Inserting a Tag** or **Inserting an image** to display for your users.

**NOTE:**

- Avoid using copy + paste from Microsoft Word.

# Individual Emails

## Prospect/Member Account > Work It

 **Mr Customer**

No Lead Type

[more options for Mr Customer](#)


Contact


Sales Scripts


Fast Book


+ add task

log call

 Make A Phone Call

 **Send An Email**

 Send An SMS

 Person to Person

Past Emails (11)

Key Note (0)

All Notes (9)


Lead Type History

☒ hide misc emails

Toclub@ready.com

Reply Tosupport@clubready.com

Subjectyou can use [firstname] [lastname] tags in the subject  
email subject..


TemplateDefault Single Ad-Hoc Email  
[view](#) | [change](#) | 

PurposeInternal Sales (eg PT)

**B**


**I**

**U**



enter your email message here - this will replace the [content] tag in the email template when the email is sent...you cannot use any additional tags in this text

✓ Send Email To Mr

 **Thank You For Your Interest In Our Club**


Sent 10 months ago [view](#)

Delivered (not read yet)

On the left you will be able to send an email to the client. On the right you will see a list of all the email correspondence between the client and staff for this task.

# Individual Texts

Prospect/Member Account > Work It

**Mr Customer**

No Lead Type

[more options for Mr](#)

ContactSales ScriptsFast Book

[+ add task](#)[log call](#)

[Make A Phone Call](#)[Send An Email](#)[Send An SMS](#)[Person to Person](#)

SMS HistoryKey Note (0)All Notes (10)Lead Type History

SMS Requires A Credit Balance

current available credit9.34 USD ✓

[view prices](#) | [+ add credit](#)

Enter The Text (SMS) Message Below


160 characters maximum - 142 remain

Internal Sales (eg PT)

✓ Send SMS To (123) 456-7890 [reset](#)

OUT just now

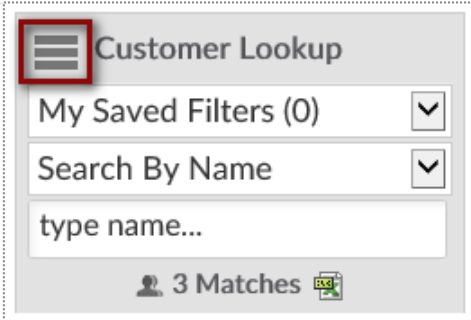
Hello Mr Customer!



✓ Mark All SMS Read

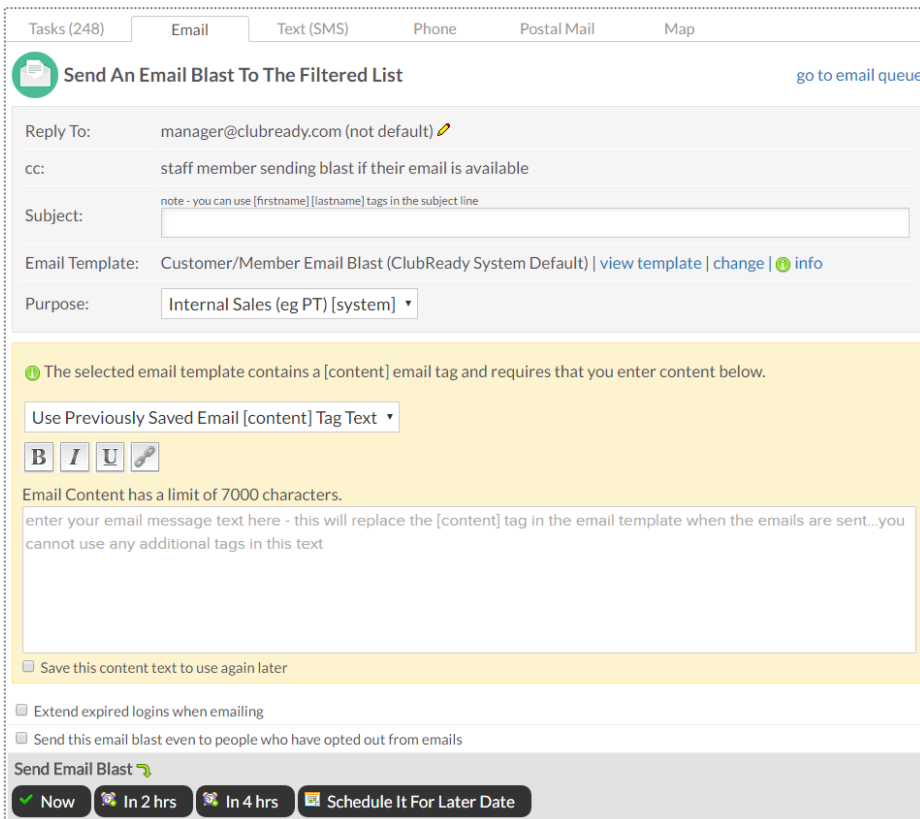
The SMS (Text Message) screen will allow you to send a text message to the client and keep a log of both the staff and client responses for this task.

# Email Blasts



## Prospects/Members > Email

Your email blast will attempt to send to all of the prospects/members that are showing in the lookup list at the time you send your blast, so filtering will allow you to email a target audience. To start narrowing who will receive an email blast, click on the 3 bars. This will provide you with options to narrow the search.



Select, or fill in, the following fields: **Reply To**, **Subject**, **Email Template**, **Use Previously Saved Email** (If you have saved any email content previously you can select this saved text from the drop-down box).

Other selections will include:

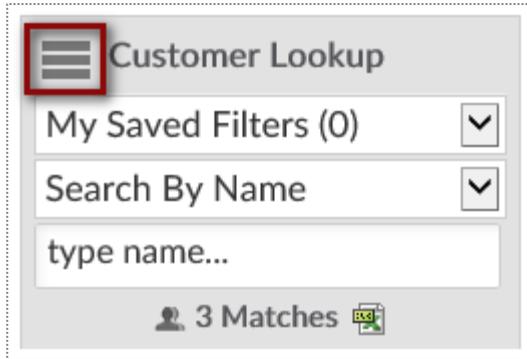
**Save this content text to use again later** - If you are going to send this out on a regular basis.

**Extend expired logins when emailing** - If you want to extend the client's access to their login area.

**Send this email blast even to people who have opted out from emails** - This option is typically used for notifying clients of past due or collections status issues.

# Text Blasts

## Prospects/Members > Text (SMS)




Customer Lookup

My Saved Filters (0) ▼

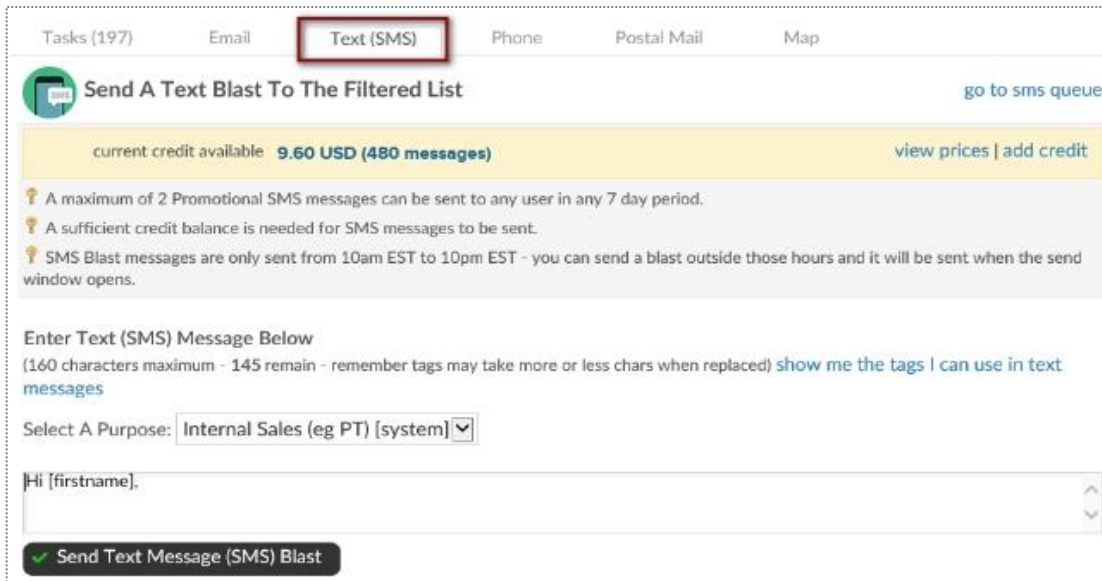
Search By Name ▼

type name...


3 Matches 

To start narrowing who will receive a text blast, click on the 3 bars. This will provide you with options to narrow the search.


The screen will display the current amount of credit available and allow you to view prices and add credit.





Tasks (197) Email **Text (SMS)** Phone Postal Mail Map

 Send A Text Blast To The Filtered List [go to sms queue](#)

current credit available **9.60 USD (480 messages)** [view prices](#) | [add credit](#)

 A maximum of 2 Promotional SMS messages can be sent to any user in any 7 day period.


 A sufficient credit balance is needed for SMS messages to be sent.

 SMS Blast messages are only sent from 10am EST to 10pm EST - you can send a blast outside those hours and it will be sent when the send window opens.

Enter Text (SMS) Message Below  
(160 characters maximum - 145 remain - remember tags may take more or less chars when replaced) [show me the tags I can use in text messages](#)

Select A Purpose: Internal Sales (eg PT) [system] ▼

Hi [firstname],

 Send Text Message (SMS) Blast

The last section is where you will actually compose the message. Click the button **Send Text Message (SMS) Blast** to start the send process.



# Live Send Queue

Reports > Communications > Live Send Queue

## Communications Live Queue


This report lets you see what is currently in the queue to be processed. You can kill anything in the queue if it has not yet been sent. For example - this is useful if you made a mistake in an email blast and want to stop it going out.

Email

SMS (Text)


Mobile Push


Black Friday Sale!! sent by Jacqueline Armstrong on 11/2/2020 to 1 people - scheduled for 11/2/2020 2:09:48 PM ▾

 Kill this Blast

☐ Select All

transactional | blasts

 Refresh Queue

 Delete Selected Items

The queue will display all communications currently being processed or are waiting to be sent out. You can view the different methods of communications in queue from the tabs on the top: **Email**, **SMS (Text)**, and **Mobile Push**. Using the drop-down menu you can view all of communications in queue or filter down to view only specific communications.

# Basic Email Settings

Setup > Communications > Communication Settings

Basic Email Settings	
<b>Your Default Emails Reply To Address</b> <i>(every mail type can have its own from address, plus other options. This is the fall back default)</i>	<input type="text" value="support@clubready.com"/> <i>eg info@yourclub.com</i>
<b>Email Friendly From Name</b> ⓘ	<input type="text" value="ClubReady Fitness"/> <i>eg My Name or My Company Name</i>
<b>Default Email Signature</b> <i>(the mail tag [defaultsignature] is replaced by this)</i>	<input type="text" value="Yours In Health And Wellness"/> <input type="text" value="ClubReady Fitness"/>
<b>Contacts From Login Area Are Sent To</b> ⓘ	<input type="text" value="yourclubinfo@clubready.com"/>

**Your Default Emails Reply To Address** - email address that will be the default used for all emails sent from the system unless you specify a different email under each email defaults.

**Email Friendly From Name** - the name that you would like your clients to see in the from field when they open their email.

**Default Email Signature** - what you would like clients to see for your email signature. In any email blast you can use the tag [defaultsignature] instead of typing your signature in each email template or blast.

**Contacts From Login Area Are Sent To** - When clients reply back this will be the email address these responses are sent to.



# Members Weekly Email

Setup > Communications > Communication Settings

### Customers Weekly Email

ClubReady can send your active Customers a weekly email / newsletter. You can design the look, branding and content to be whatever you want using email HTML templates. To set the mail template that is used for weekly emails go to [system emails setup](#) and adjust the email settings for weekly emails. Mail tags exist that enable you to make this email a rich source of information including info on bookings, nutrition tracking and so on.;

Weekly Emails Active? ⓘ	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Day of Week Email Is Sent ⓘ	Monday ▾
Weekly Email Subject Line	<input type="text" value="Your Weekly Fitness Update"/> <i>eg Your Weekly Fitness Update</i>


**Weekly Emails Active?** - select this check-box if you want to activate weekly fitness email tips.

**Day of Week Email Is Sent** - select the day you want the fitness email to be sent

**Weekly Email Subject Line** - you can change the title of the weekly fitness email


# System Emails


Setup > Communications > System Emails


 Default New Prospect Email ENABLED


This is the default email setting when adding new prospects. Each [prospect type](#) can either send no email, use these defaults or have their own settings. If no prospect type is defined then these default settings are used. If a default prospect type is defined then the setting for that prospect type will be used.

Email Subject	<input type="text" value="Thank You For Your Interest In Our Club"/>
Default Email Reply To Address	<input type="text" value="yourclubinfo@com.com"/>
Email And Reply To Address Options <small>(default will be used if other options are not possible due to lack of email address etc)</small>	<div><input checked="" type="radio"/> Always send from default from address</div> <div><input type="radio"/> Send from assigned sales consultant</div> <div><input type="radio"/> Send from default but cc assigned sales consultant</div>

 Any template used by this email type **must** contain the following email tags [\[unsubscribe\]](#) - only templates that contain these mail tags will shown in the drop down of available email templates below

Emails Use This Email Template <a href="#">view</a>   <a href="#">add new</a>	<input type="text" value="New Prospect Email [System Default]"/>
Optional Email Attachment	No Attachment 

 Update This Email Type

 Send A Test Email

System emails are the type of emails that ClubReady sends (mostly automatically) as part of the day to day operation of a club.

This allows you to have full control over the branding of all emails that are sent.

From the system email settings screen you are able to adjust the following:

Email Subject

Default Email Reply To Address

Email And Reply To Address Options

Required template tags

Emails Use This Email Template

Optional Email Attachment

# Add SMS Credits

Setup > ClubReady Invoices > Add Credit

ClubReady Invoices / Billing

Unpaid (0)

Paid (0)

Add Credit

Payment Preferences

current credit available

909.49 USD

Communications Price List (In USD \$)

SMS Text Messages	0.02	each
-------------------	------	------

Add Additional Credit Balance To Account

An available account balance is needed to use any of the services listed above, as services are consumed the available credit balance is reduced.

Credit Amount To Add

USD (\$)

SECURE

VISA

M.C.

STARS

DISCOVER

Card Type

Select

Card Number

Card Expiration Date

1 - January

2016

CVM Number (on back of card)

what is this?

Name On Card

Street Address

Postal Code

Make This The Card On File ?

☒

securely stored with 256 bit encryption. Only 1 card can be stored.

Click To Add Credit

The top of the screen will show the current amount of credit available. The next section Communications Price List (In USD\$) will provide the cost per type of communication (SMS).

If you need to purchase communication credits scroll down to the next section **Add Additional Credit Balance To Account**. Enter in the amount of credit you will be adding in dollars (USD) and select whether you the credit card on file to be charged. If you have a credit card on file it will be displayed on this screen.



# Agreement Write Up

# Write Up New Agreement – Search For User

Main > Write up New Agreement > Search for client

Lookup By Name (always try a lookup first) or add somebody new

Mr Customer

Before Proceeding To The Agreement Selection Please Confirm Their Details

First Name REQ Mr  
☐ include in duplicate search

Last Name REQ Customer  
☐ include in duplicate search

Gender REQ ☒ MALE ☐ FEMALE  
☐ include in duplicate search

Email REQ customer@cp.com  
☐ include in duplicate search

Cell Phone REQ 85512147946

Home Phone

Work Phone  
☐ include in duplicate search

Date Of Birth Month Day Year

Address REQ 1 Main Street

City REQ Anywhere

State REQ MO

ZIP Code REQ 63001

Drivers License No.

Barcode

External User ID


☒ Confirm


All fields that have the required red icon (REQ) need to be filled out. Once you have verified all information click **Confirm** to continue.




# Write Up New Agreement


Select Plan > Adjust Pricing & Pay Dates

 Write Up A New Agreement For [Mister Customer \[54307259\]](#)

**Step 1**   
Agreement Setup

**Step 2**   
Review & Finalize

**Step 3**  
Complete

  
**SECURE**

**8 Classes Per Month (auto renew) (\$118.30)**  
[choose a different sales package](#) | [go to setup for this sales package](#)

8 X RH Class Credit classes

Installment Duration 1 Month : Credits must be used within 31 days of purchase

Buyers Name

**Step 1:** After selecting the Sales Package Folder and desired package you will be taken to the **Write Up A Agreement For** screen.

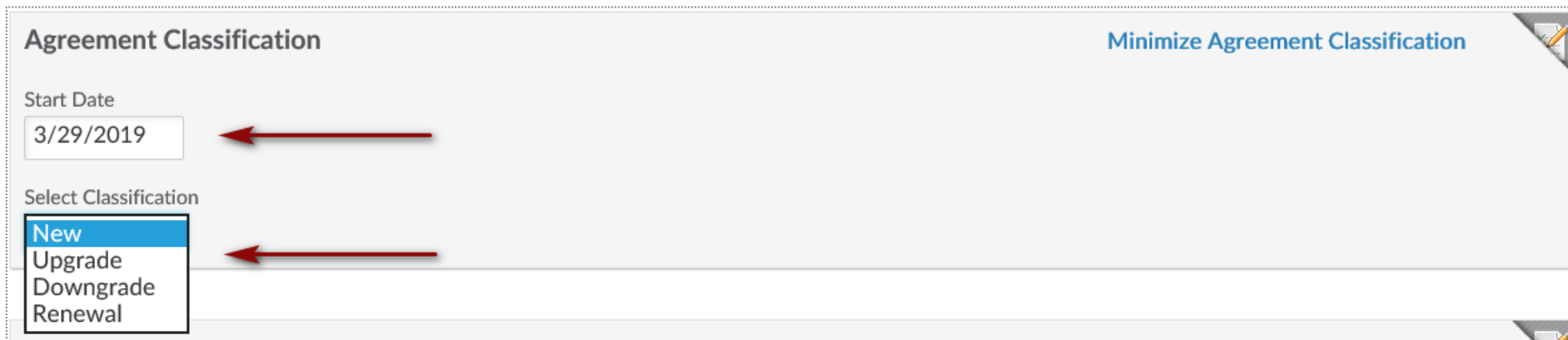
**Included Amenities** - If the package selected includes amenities, these will be listed here.

**Buyers Name** - You can change the buyers name if they are different than the customer.



# Agreement Classification: Post Date Agreement

Select Plan > Adjust Pricing & Pay Dates



The screenshot shows a web form titled "Agreement Classification". In the top right corner, there is a link that says "Minimize Agreement Classification" and a small icon of a folded corner. Below the title, there are two main input areas. The first is labeled "Start Date" and contains a text box with the date "3/29/2019". A red arrow points to this text box from the right. The second area is labeled "Select Classification" and contains a dropdown menu. The dropdown menu is open, showing four options: "New", "Upgrade", "Downgrade", and "Renewal". The "New" option is highlighted with a blue background. A red arrow points to the dropdown menu from the right. The entire form is enclosed in a light gray border with a dotted line around it.

**Agreement Classification** - You have the ability to mark the current agreement as either a **New**, **Downgrade**, **Upgrade** or **Renewal** agreement. From here, you are able to adjust the **Start Date** if it is different from the date the agreement is written up. For example, you may start a renewal agreement for a member in the future while allowing their current agreement to expire.



# Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup

[minimize installment list](#)

\$

Update All 6 Installment Prices

# 1	<div>Down</div>	\$ 50	11/10/2017
# 2	<div>Draft</div>	\$ 50	12/10/2017
# 3	<div>Draft</div>	\$ 50	1/10/2018
# 4	<div>Draft</div>	\$ 50	2/10/2018
# 5	<div>Draft</div>	\$ 50	3/10/2018
# 6	<div>Draft</div>	\$ 50	4/10/2018

Auto-Renew Evergreen [explain](#)

Yes

No

(Basic Membership Plan) At \$ 50

Annual Enhancement Fee

Yes

No

\$ 50 on 5/10/2018 every 12 months

Term Total Price	\$300.00
Term Amount Paid Today	\$50.00
Amenity Term Total	\$0.00
Amenity Total Today	\$0.00
Subtotal	\$50.00
Sales Tax	\$0.00
Account Credit Balance	\$0.00
<b>Total Due Today</b>	<b>\$50.00</b> <div>PTP Option</div>

**Opportunity Setup** - Shows initial planned payments and their due dates. You have the option to adjust both the amount coming due and their due dates.

**Auto-Renew Evergreen** - The status of an auto-renew agreement will be detailed here. Select **No** if the customer does not want this agreement to be on Auto-Renew.

**Enhancement Fee** - If an Enhancement Fee is included in this package it will be detailed here.



# Apply a Package Discount

Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup

Select Package Discount ▾

Enter Promo Code

✓ Apply Discount

Reset Discount

# 1	Down	\$ 29.99 + tax	11/10/2017
Total Price (taxed @ 7.000%)		\$29.99	
Amenity Term Total		\$0.00	
Amenity Total Today		\$0.00	
Subtotal		\$29.99	
Sales Tax		\$2.10	
Account Credit Balance		\$0.00	
<b>Total Due Today</b> ✓		<b>\$32.09</b>	

**Opportunity Setup** - The initial planned payments and their due dates will be listed. You have the option to select a package discount from the drop down and add a promo code. Click **Apply Discount**.

**Sales Package Discounts** - <https://www.clubready.com/wiki/WK34569244692>



# Apply a Package Discount

Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup

Brooks Discount

Enter Promo Code

✓ Apply Discount

Reset Discount

# 1	Down	\$ 29.99 + tax	\$26.99	11/10/2017
Total Price (taxed @ 7.000%)		\$29.99	\$26.99	
Amenity Term Total		\$0.00	\$0.00	
Amenity Total Today		\$0.00	\$0.00	
Subtotal		\$29.99	\$26.99	
Sales Tax		\$2.10	\$1.89	
Account Credit Balance		\$0.00	\$0.00	
Total Due Today ✓		\$32.09	\$28.88	

Once applied, it will automatically display the discount.



# Write Up New Agreement

## Assigning Sales Commission & Member Contact

Responsible Staff

Choose staff for sale 

Assign Staff

Choose staff member 

Optional Note

Enter an optional note here....  





 SAVE AND GO TO STEP 2 - Review & Finalize


Select the **Responsible Staff** who will receive the full commission. If you wish to split the sale with another employee, select **Split sale between staff** and choose the staff from the second drop down. For follow up tasks choose from the **Assign Staff** drop down. You may add a note in the field under **Optional Note**. Once you are finished click the button **SAVE AND GO TO STEP 2 - Review & Finalize**.





# Write Up New Agreement


Review Terms > Take Signatures

 Write Up A New Agreement For Mr Customer [17232421]

Step 1   
Agreement Setup

**Step 2**   
Review & Finalize

Step 3   
Complete

 **SECURE**

**Review** [hide review details](#)

✔ Membership 1: 4 Classes a Month (x 3 Installments)

✔ Total initial term price is \$261.00

✔ Total number of sessions is 12 over the term

✔ Total Down Payment Today \$87.00

✔ First installment payment is today for \$87.00


✔ Followed by 2 monthly installments.


✔ Then auto-renew at \$87.00

✔ The next automatic installment is on 8/11/2017 for \$87.00

**Agreement**

✔ This agreement requires 5 signatures - Signature capture method - SMS Validate & Typed Signature or switch to [On-Screen Signature](#) instead

 **UNSIGNED AGREEMENT**  
CLICK TO REVIEW & **SIGN**


 **CLICK HERE TO ONLY TAKE SIGNATURES**

Take a minute to review the terms of the agreement and confirm they are accurate.

Select here to open full agreements for signatures.

# Taking Signatures

## Review Contract & Take Signatures

 View Unsigned Agreement 

jump to signature ▾ 1


that if at any time I believe conditions to be unsafe, I will immediately discontinue further participation in the Activity.

2. I FULLY UNDERSTAND that: (a) Parties Activities involve risks and dangers of SERIOUS BODILY INJURY, SICKNESS AND DISEASE, INCLUDING PERMANENT DISABILITY, PARALYSIS AND DEATH ("Risks"); (b) these Risks and dangers may be caused by my own actions, or inactions, the actions or inactions of others participating in the Activity, as well as those of Parties, the condition in which the Activity takes place, conditions in the club, the actions or inactions of any other third party, or THE NEGLIGENCE OF THE "RELEASEES" NAMED BELOW; (c) there may be other risks and social and economic losses either not known to me or not readily foreseeable at this time; and I FULLY ACCEPT AND ASSUME ALL SUCH RISKS AND ALL RESPONSIBILITY FOR LOSSES, COSTS, AND DAMAGES incurred as a result of my Participation in the Activity.

3. I HEREBY RELEASE, DISCHARGE, COVENANT NOT TO SUE, AND AGREE TO INDEMNIFY AND SAVE AND HOLD HARMLESS Parties, their respective administrators, directors, agents, officers, volunteers, and employees, other participants, any sp advertisers, and if applicable, owners and lessors of premises on which the Activity takes place (each considered one of "Releasees" herein) from all liability, claims, demands, losses, or damages on my account caused or alleged to be caused whole or in part by any person for any reason or otherwise, including negligent rescue operations and further agree that if, despite this release, I, or anyone on my behalf makes a claim against any of the Releasees named above, I WILL INDEMNIFY, SAVE AND HOLD HARMLESS EACH OF THE RELEASEES FROM ANY LITIGATION EXPENSES, ATTORNEY FEES, LOSS LIABILITY, DAMAGE OR COSTS ANY MAY INCUR AS THE RESULT OF ANY SUCH CLAIM.

I HAVE READ THIS AGREEMENT, FULLY UNDERSTAND IT'S TERMS, UNDERSTAND THAT I HAVE GIVEN UP SUBSTANTIAL RIGHTS BY SIGNING IT AND HAVE SIGNED IT FREELY AND WITHOUT ANY INDUCEMENT OR ASSURANCE OF ANY NATURE AND IT SHALL BE A COMPLETE AND UNCONDITIONAL RELEASE OF ALL LIABILITY TO THE GREATEST EXTENT ALLOWED BY LAW. THAT IF ANY PORTION OF THIS AGREEMENT IS HELD TO BE INVALID THAT THE BALANCE, NOTWITHSTANDING, SHALL REMAIN IN FULL FORCE AND EFFECT.

Mr Customer



05/11/2017

Take the member's signature using the signature capture method setup for your club. .

When performing a phone sale, you have the option to skip signatures. Next time the member checks in, they can sign the agreement.

 Electronic Signature 1 of 1

CLICK TO SKIP THIS SIGNATURE

Sign here!




cancel


# Finalize The Agreement

Take Payment & Finalize the Deal


Down Payment Today \$9.95




AT POS




CARD




BANK ACH




CHECK




CASH



MEMBER

 *no payment method is selected yet*

 **FINALIZE THE AGREEMENT**

[or Go Back To Step 1](#)


Different methods are available for you to take payment from this screen.

**NOTE:** If your member wishes for another member to pay for the agreement then select the **Member** box to the right. This is considered to be your 'Other User'.



# Access Online Sign-Up Links

Setup > Sales > Sales Packages

Monthly Memberships  (1 packages)

DRAG

+

Add A Sales Package

↑

Hide Packages

\$19.99

M

2020 M2M Membership

TAXED

1

2

3

C

A

SC

online

DRAG

✕

Locate the sales package and click on its name.  
Next, click **Installments** tab.

x 1 - Single Package - No Installments		<div><div>online</div><div>✕</div></div>
Enabled For Sale	<div>Yes</div> <div>No</div>	
Installment Price	\$19.99 Each Installment <i>(100% of default package price)</i>	
Total Length Of Term	1 Months	
Any Session Credits Get Assigned	All up front - even if installment is not paid	
Setup Fees	None	
Enhancement Fee	None	
In-App Purchase Enabled	<div>Yes</div> <div>No</div>	Contract Template: <div>No Contract Is Used</div>
Online Signup Enabled	YES - <a href="https://www.clubready.com/getstarted/2829/437839/">https://www.clubready.com/getstarted/2829/437839/</a>	

Click or copy and paste the link into a web browser. The online sales package will appear for you to preview it. Use the link on your **website, email blast or social media.**

# Managing Agreement – Draft Status

Member > Agreement > Full Details

	(6) x PT 1 X Month  Active - In Auto Renewal
Agreement Document	 agr927-165614-3150732-c3007-sg1925.pdf no electronic signatures (+ 3 missing signatures)   <a href="#">Regenerate this document</a> (CR staff)
Sale Date	12/18/2014 10:42 PM (last year)
Customer	<a href="#">Mr Customer [2311063]</a>
Draft Status	 Active 

Scroll down the Agreement Summary page to the **Draft Status** field. Click the edit pencil to start the disable or enable the draft process. A mandatory note is required to disable the draft. Click **Update Draft Status** button to save your change.

# Managing Agreement – Auto Renew Evergreen

Member > Agreement > Full Details

	(6) x 1xWeek 30 Minutes PT  Active - Future Payments
Agreement Document	 agr927-4077574-9193306-c1934-sg2069.pdf 1 electronic signatures   <a href="#">Regenerate this document (CR staff)</a>
Sale Date	11/7/2016 2:30 PM (4 days ago)
Customer	<a href="#">Mr Customer [12470635]</a>
Draft Status	 Active 
Auto-Renew Evergreen	Yes  

To edit the **Auto-Renew Evergreen** status click the edit pencil next to Yes/No. Yes means this agreement will auto-renew once the term is fulfilled and No means this agreement will only bill through the initial term and billing will stop. You may include an optional note describing why you are editing the auto-renew status. Choose to send an email notification to the customer about this change.

## Notes:

**Turning OFF auto-renew does not mean the agreement is cancelled.** All invoices that are already generated under the agreement Invoices page will still be attempted.

**Turning ON auto-renew** will generate invoices automatically based on the last unpaid invoice on the account. Please confirm under invoices that there is a future unpaid invoice that will be automatically picked up to use as the auto-renew invoice moving forward. If there is not a future unpaid invoice you will need to [Manually Add A New Invoice](#). Auto-Renew means that once the last shown invoice is paid, the system will generate the next invoice automatically. These invoices will continue to generate until the agreement is cancelled.



# Member Management

# Invoice Adjustments

Member > Billing > Invoices > Edit Pencil

5/1/2018

\$44.00

#97970023 MTM Deluxe Package 

Due on 5/1/2018

Membership

#76423266 Adjust Invoice For Mr Customer

\$9.95 / Base Monthly / Due 6/4/2017

## Options For Adjusting This Invoice

Yes No

Automatically Draft This Invoice When Due

Note - you can turn off all drafting for this agreement from the summary side-menu option

☒ Adjust The Invoice Details (Amount or Due Date)

☐ Cancel The Invoice

Action : Change Package / Invoice Due \$ Amount / Due Dates

Amount Due \$

9.95

No Sales Taxes ▼

\$

Due Date

6/4/2017

Change Package Type

Base Monthly ▼

Optional Note


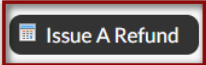
 Update or cancel

Selecting the option **Adjust The Invoice Details** will update the screen to display all options you can adjust for this one invoice. Make the desired changes to the invoice. Click the **Update** button to save changes.

**NOTE:** Cancelling an invoice does not cancel an agreement.

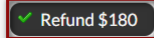
# Refund an Invoice

Member > Billing > Invoices > Select Invoice ID #> Issue A Refund

Invoice Detail (#76811337) PAID 	
Name	Mister Customer
Amount	\$180.00 
Payment Due Date	5/11/2017
Detail	30Min Personal Training 4xMonth (monthly)

After select the blue invoice id#, Select **Issue A Refund** for refund options.

**NOTE:** ACH Transactions must settle prior to processing the refund.




#76811337 Refund Paid Invoice Mister Customer	
\$180.00	
30Min Personal Training 4xMonth (monthly)	
Paid 5/11/2017 By Cash	
Customer Refund	
Refund Method	Select
Send Notification Email	Select
Partial Refund	Cash
	Written Check
	Client Credit Balance
Status of any associated bookings / credits	
Past bookings	0
Future bookings	0
Booking Credits	4 <small>credits will be automatically deleted</small>
Optional Note	
 or <a href="#">cancel</a>	


From this detail screen, select the desired form of payment to be refunded back to the member. Options will be **CC/Bank ACH on file, Written Check, Cash, or Client Credit Balance**. You may also choose to send an email notification or leave a note. To finalize, click the **Refund** button.

**NOTE:** Client Credit Balance does not refund back to the credit card. This option is to apply store credit to their ClubReady account.

# Adding a New Invoice




Member > Billing > Invoices





[+ Add A New Invoice](#) [Go To POS](#)

14 Invoices

Due 	Amount	Detail	Status
5/10/2017	\$0.00	<a href="#">#76759669</a> New Member Consultations  	Free - Wednesday, May 10, 2017 12:00 AM <a href="#">Bookings</a>

Once you are on the Billing screen, click the **Add A New Invoice** button.

**NOTE:** Adding a new invoice does not initiate a new agreement.



**Member > Billing > Invoices > Add A New Invoice**

+ Add A New Invoice

Don't Tie To An Existing Agreement

Select Sales Package or Fee Type

None

Cancellation Fee

Freeze Fee

Enter Invoice Description

Enter Invoice \$ Amount

\$

Enter Payment Due Date

6/9/2017

Enter An Optional Note

+ Create New Invoice

or cancel

You have the option from here to **Tie to An Agreement, Select A Sales Package or Fee Type, Invoice Description, Invoice Amount, Payment Due Date and an Optional Note.** To finalize, click **Create New Invoice**






# Freeze an Agreement

Member Account > Agreements > Full Details > Freeze Options

[Detail](#) **Agreements (2)** [Bookings \(0\)](#) [Notes \(9\)](#) [Files \(2\)](#) [Tasks \(0\)](#) [Past 30 Days](#)



**Mister Customer** [15430951] Male  
Member since 5/10/2017 ends 3/1/2019

WORK IT

GO POS

NEW DEAL

BILLING

BOOKINGS



PRESENT

PROFILE

ALL DETAIL


LEAD HIST.

**Agreements List**

5/11/2017	<div>Active Draft</div>	<div>\$1,080.00</div> <div>(#4920210) 6 x 30Min Personal Training 4xMonth (monthly) </div> <div> ELECTRONIC SIGNATURE</div>	<div>Full Details</div>
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## Agreement Freeze Options

A freeze puts an agreement on hold for either a specific or an indefinite period. A freeze can be reversed or updated at any later date.

Freeze Type	<input checked="" type="radio"/> Freeze A Specific Number Of Months <input type="radio"/> Freeze Indefinitely (Disabled In Setup)	
	<input type="text" value="1"/>	months
Start Freeze	<input checked="" type="radio"/> Immediately <input type="radio"/> On A Future Date	
Charge A One Time Freeze Fee	\$ <input type="text"/>	
Monthly Freeze Invoice At	\$ <input type="text"/>	
Email A Notification Of Freeze?	<div><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No</div>	to <input type="text" value="mr.customer@email.com"/>
Add An Optional Internal Note	<input type="text"/>	
<div> This freeze requires a signed freeze agreement</div>		
<div>Implement Agreement Freeze</div>		

From this screen you can select the following: **Freeze Type, Start Freeze, Charge A One Time Freeze Fee / Monthly Freeze Invoice, Membership Expiration, Email Notification of Freeze.**

To complete the freeze process click the **Implement Agreement Freeze** button.

# Unfreeze an Agreement

Member Account > Agreements > Full Details > Remove Freeze

Mr Customer

Select Other Agreements

[go all sessions & bookings](#) | [go all invoices & payments](#) [Go Back](#)

Agreement Summary

Notes 10

Invoices 6


Payments 3

Declines 0

Credits / Bookings 20

Refunds 1

Files 0

 Remove Freeze

Currently Frozen Since 11/9/2020 by Jacqueline Armstrong - Frozen For 2 Months

Remove The Freeze


Agreement Auto-Renew Status After Freeze Removal 

On Off


 (this was the state prior to the freeze)

Adjust Membership Expiration Date 11/30/2020 [make it 30 days from today](#)

1 Previously Paused / Moved Invoices That Will Be Impacted

Detail	Original Due	Unfrozen Due Date
Basic Membership Plan  (was pushed out)	1/25/2021	3/25/2021

Add an optional internal note

 Remove The Agreement Freeze (un-freeze)


From this screen you can select the following: **Agreement Auto-Renew Status After Freeze Removal**, **Adjust Membership Expiration Date**, option to adjust the invoices that will be placed back in 'active' status and **Add an optional internal note**. Click **Remove The Agreement Freeze (un-freeze)**.



# Cancel an Agreement

Member Account > Agreements > Full Details > Cancel This Agreement


[Detail](#) **Agreements (1)** [Bookings \(0\)](#) [Notes \(2\)](#) [Files \(1\)](#) [Tasks \(0\)](#) [Past 30 Days](#)


**Mr Customer** [12470635] Male  
month to month  
Amenities Towel Service


[WORK IT](#) [GO POS](#) [NEW DEAL](#) [BILLING](#) [BOOKINGS](#) [PRESENT](#) [PROFILE](#) [WELLNESS](#) [LOGIN AS](#) [ALL DETAIL](#) [LEAD HIST.](#)

Agreements List

11/7/2016	● Active Draft	\$720.00 + \$50.00 in Fees (#4265319) 6 x 1xWeek 30 Minutes PT agr927-4077574-9193306-c1934-sg2069 <b>ELECTRONIC SIGNATURE</b>	<a href="#">Full Details</a>
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 [Cancel This Agreement Effective Immediately](#)

 [Schedule This Agreement To Auto-Cancel On A Future Date](#)

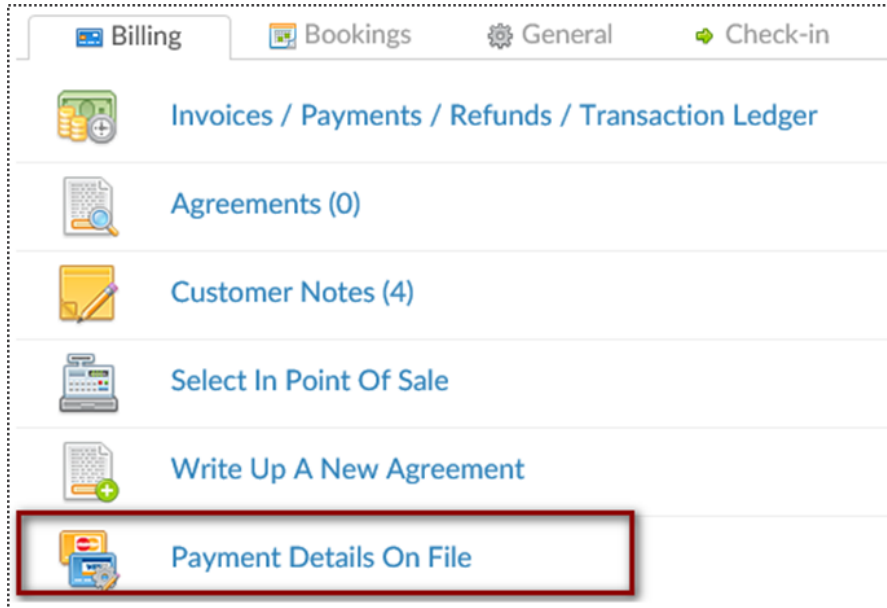
 [Cancel & Refund All Payments To A Credit Balance For A Re-Write](#)

**Cancel This Agreement Effective Immediately:** This agreement will be cancelled today. All unpaid invoices will be cancelled.

**Schedule This Agreement To Auto-Cancel On A Future Date:** This agreement will be auto-cancelled on a future date you select. The agreement will not change until that date.

**Cancel & Refund All Payments To A Credit Balance For A Re-Write:** All paid invoices will be refunded to a customer as credit balance.

# Add/Update Credit Card On File

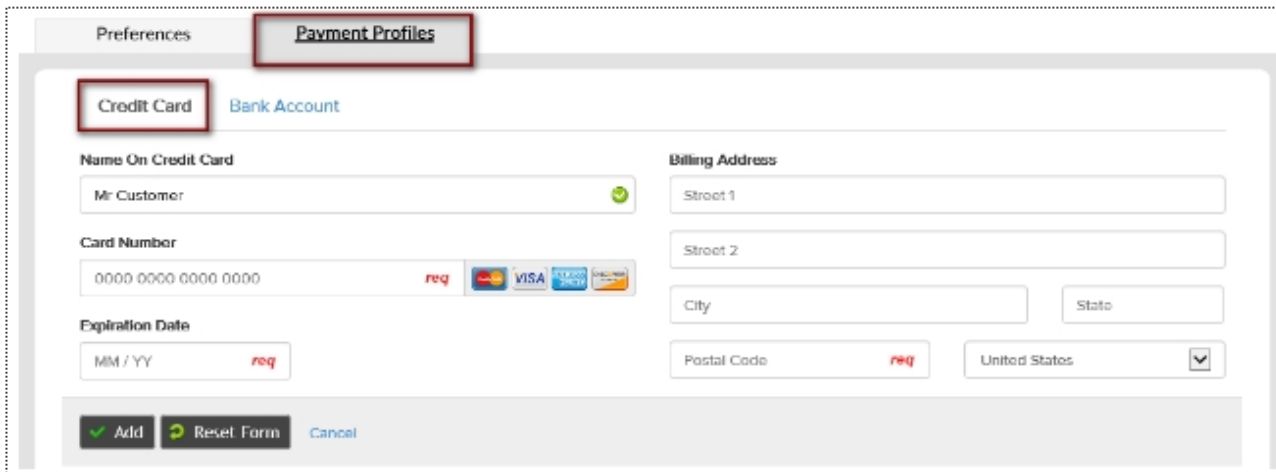


A screenshot of the 'Billing' menu in a software interface. The menu is titled 'Billing' and contains several options: 'Invoices / Payments / Refunds / Transaction Ledger', 'Agreements (0)', 'Customer Notes (4)', 'Select In Point Of Sale', 'Write Up A New Agreement', and 'Payment Details On File'. The 'Payment Details On File' option is highlighted with a red rectangular border.

Member Account > All Detail > Billing > Payment Details On File –

Choose the desired payment preference and click “Click To Update Payment Preferences”.

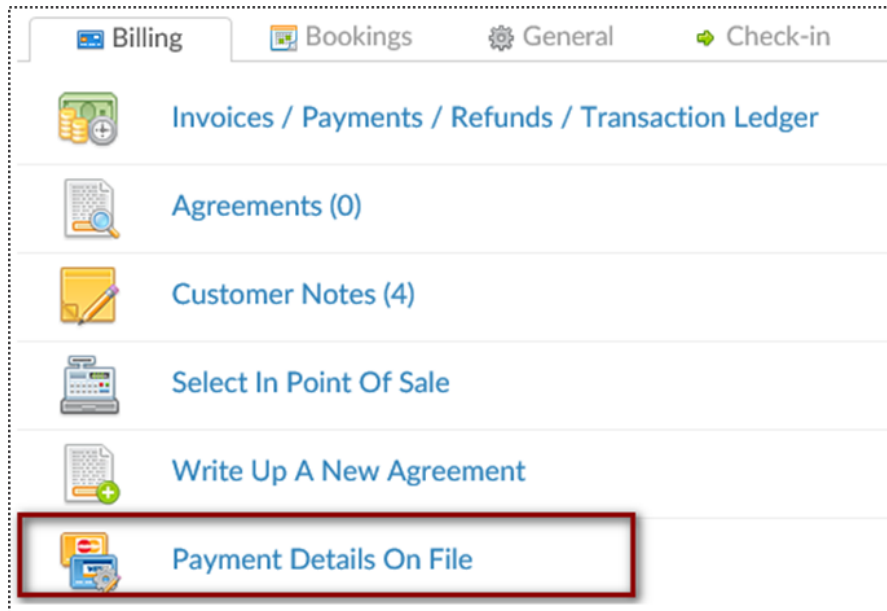
To add a new credit card select **New Payment Profile** button. Click on **Credit Card** tab to enter the client's credit card information.



A screenshot of the 'Payment Profiles' form in a software interface. The form is titled 'Payment Profiles' and has two tabs: 'Credit Card' and 'Bank Account'. The 'Credit Card' tab is selected and highlighted with a red rectangular border. The form contains several input fields: 'Name On Credit Card' (with a dropdown menu showing 'Mr Customer'), 'Card Number' (with a placeholder '0000 0000 0000 0000' and a 'req' label), 'Expiration Date' (with a placeholder 'MM / YY' and a 'req' label), 'Billing Address' (with fields for 'Street 1', 'Street 2', 'City', 'State', 'Postal Code', and 'United States'), and a 'req' label next to the 'Postal Code' field. At the bottom of the form are three buttons: 'Add', 'Reset Form', and 'Cancel'.

Select the **Add** button to save the information. If you just need to update the expiration date click the edit pencil next to the existing payment profile.

# Add/Update ACH On File



The screenshot shows a sidebar menu with the following items:

- Billing (selected)
- Bookings
- General
- Check-in

Under the Billing menu, the following options are listed:

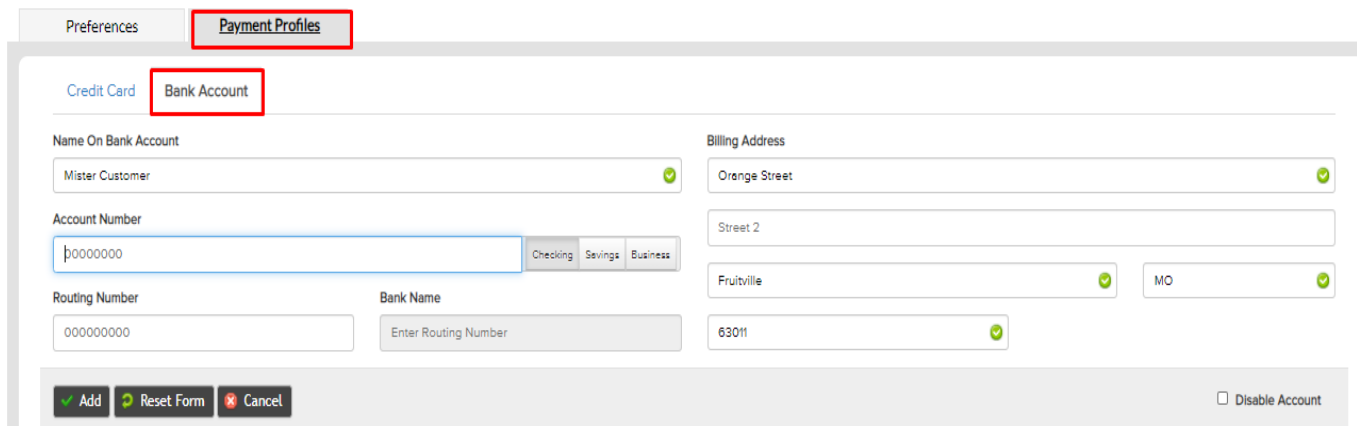
- Invoices / Payments / Refunds / Transaction Ledger
- Agreements (0)
- Customer Notes (4)
- Select In Point Of Sale
- Write Up A New Agreement
- Payment Details On File** (highlighted with a red box)

**Member Account > All Detail > Billing > Payment Details On File** – Choose the desired payment preference and click “Click To Update Payment Preferences”.

To add a new bank account select the **New Payment Profile** button.

Click on **Bank Account** tab to enter the client's bank account information.

Select the **Add** button to save the information.



The screenshot shows the 'Payment Profiles' section with the 'Bank Account' tab selected. The form contains the following fields:

- Name On Bank Account:** Mister Customer (with a green checkmark)
- Account Number:** 00000000 (with a blue highlight and tabs for Checking, Savings, and Business)
- Routing Number:** 000000000 (with a button to 'Enter Routing Number')
- Bank Name:** Enter Routing Number (with a button to 'Enter Routing Number')
- Billing Address:** Orange Street (with a green checkmark)
- Street 2:** (empty)
- City:** Fruitville (with a green checkmark)
- State:** MO (with a green checkmark)
- Zip:** 63011 (with a green checkmark)

At the bottom, there are buttons for **Add**, **Reset Form**, and **Cancel**, along with a checkbox for **Disable Account**.

# Update Member's Profile

Member Account > Profile

Detail

Agreements (1)


Bookings (0)

Notes (4)


Files (1)


Tasks (1)


Past 30 Days





**Mr Customer** [9679922] Male  
Amenities Cross-Club Access, Tanning, Towel Service, Childcare


WORK IT


GO POS


NEW DEAL


BILLING


BOOKINGS


PRESENT


PROFILE

WELLNESS

LOGIN AS

ALL DETAIL

LEAD HIST.

First Name	Mr
Family Name	Customer
Address	111 street st
City	st louis
State / Province	MO
ZIP Code	63116
Preferred Contact Method	Select 
Phone	(314) 457-5454
Cell Phone	
Work Phone	
Email Address	mrcustomer@clubready.com

The options available to edit are **Member Type**, **Name**, **Address**, **Phone Numbers**, **Email**, **Emergency Contacts**, **Date of Birth**, etc. To save your changes, click the button **Click to Update**.

# Edit Membership Status

Member Account > All Detail > General > Edit Membership Status

[GO BACK](#)

MR CUSTOMER

*Membership status is driven by the members membership expiration date. You can manually edit this date below, but it will also be potentially automatically updated by scheduled payments or the status of any responsible member. Inactive members can be reclassified as membership prospects.*

Active Member - Buying Services

Member Since Date	<input type="text" value="2/13/2015"/>
Membership Expiration Date	<input type="text" value="1/21/2017"/>
Internal Prospect Type	<input type="text" value="PT Training Prospect"/>
Add A Note (Optional)	<div></div>

[Update Status](#)

**Member Since Date** -This date is set by the member's original membership purchase date. You may alter manually here.

**Membership Expiration Date** -This date is based off of the member's membership package. Adjust the expiration date on PIF (Annual) members to **1 year after Opening Day**.

**A Note** - This allows you to create a note when making any adjustments to the membership status.

Click **Update Status** to save your changes.

# Add A Photo

Member Account > Green Plus Sign

Detail

Agreements (0)


Bookings (0)

Notes (0)

Files (0)

Tasks (0)

Past 30 Days



**Mr Customer** [18351389] Male  
Amenities None

WORK IT

GO POS

NEW DEAL

BILLING

BOOKINGS

PRESENT


PROFILE

WELLNESS

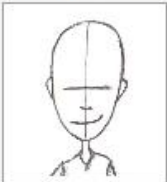
LOGIN AS


ALL DETAIL


LEAD HIST.


 **GO BACK**

Added on 3/26/2013 4:35:10 PM



 **REMOVE PHOTO**

 **UPLOAD A PHOTO**

 **WEBCAM PHOTO**

Click to **Upload A Photo** or **Webcam Photo** button and the photo will be successfully added to the client's profile.



# Member Notes

Member Account > All Detail > Member Notes

MR CUSTOMER

Select A Note Type



Was There Any Contact Involved?



Add a new note here...



Add

*FYI : Adding a note from agreement detail will tie notes to an agreement*

No Category Filter



No Date Filter



NOV 21st 2016 : 9:05 AM



Email Blast : Holy Cow don't miss out! by : Natasha C.



Receipt Status : Currently Unknown [view the email that was sent](#)

Select A Note Type from the first drop down menu and indicate if there **Was There Any Contact Involved** with the member from the second drop down menu. Type your note into the text box and click **Add** to save the note.

# Add a Member Alert

Member Account > All Detail > General > Alerts

## MR CUSTOMER

Alerts allow a note to be added for a customer that is visible in schedules and at check-in. Alerts can expire, after which time they will automatically be deleted. For customer self check an alert can show on the check-in screen visible to the customer (eg - Please talk to the front desk about your account). Alerts are not visible to customers, beyond any text made visible at customer self check-in.

### Add A New Alert For MR

Expires  (mm/dd/yyyy) - *Leave blank for no expiration*

☐ Notify Customer At Self Check-In

Add Alert

### Existing Alerts

This **Alerts** function is particularly helpful in reminding staff to take a member's signature on an unsigned agreement. (Such as when the agreement was sold over the phone)

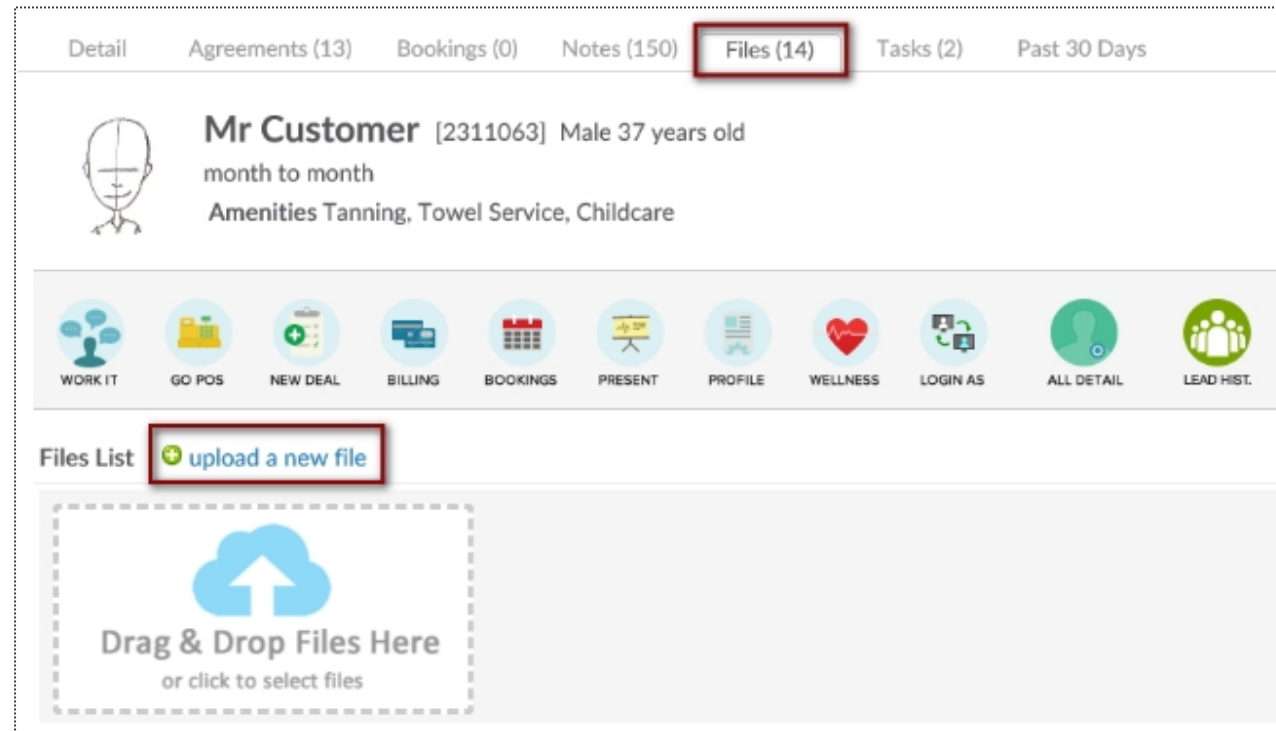
The **Add A New Alert** field allows you to enter a new message for staff.

The **Expires** field allows you to enter the date you wish the alert to expire. Leave this blank for if you do not wish for it to expire.

The **Notify Customer At Self Check-In** box allows you to enter the message you wish the customer to see. If selected the customer would immediately be notified, upon check-in, of the alert.

# Upload File To Client's Profile

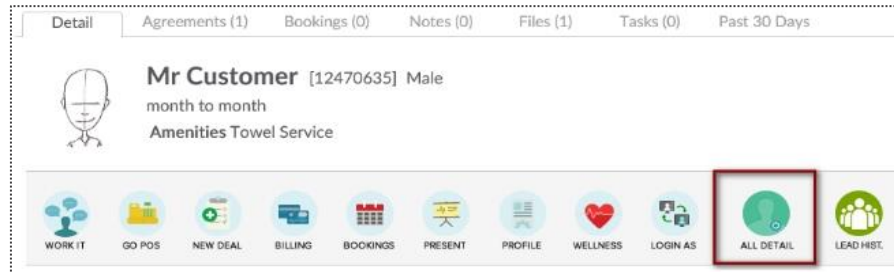
Setup > General > File Folders



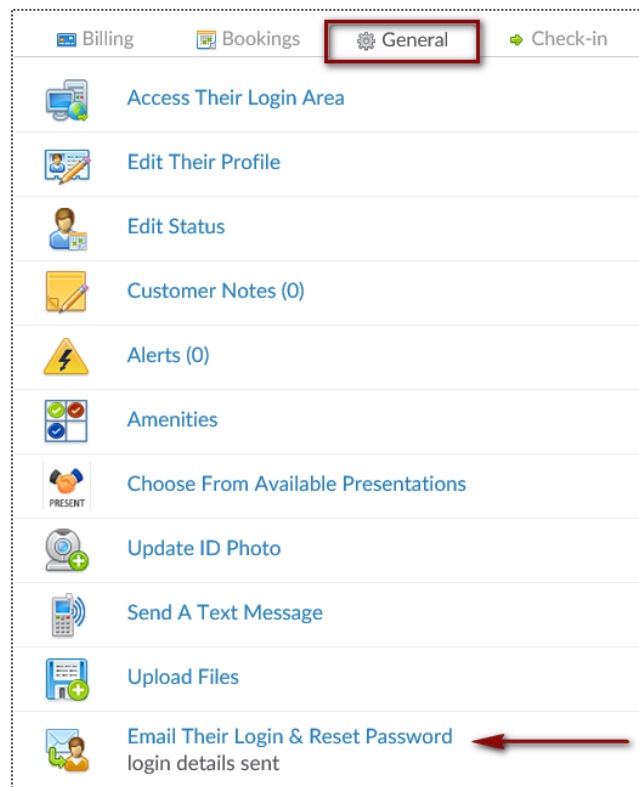
The screenshot displays a client profile interface. At the top, a navigation bar includes tabs for 'Detail', 'Agreements (13)', 'Bookings (0)', 'Notes (150)', 'Files (14)', 'Tasks (2)', and 'Past 30 Days'. The 'Files (14)' tab is highlighted with a red box. Below the navigation bar, the client's name 'Mr Customer' is shown along with details: '[2311063] Male 37 years old', 'month to month', and 'Amenities Tanning, Towel Service, Childcare'. A row of icons represents various functions: WORK IT, GO POS, NEW DEAL, BILLING, BOOKINGS, PRESENT, PROFILE, WELLNESS, LOGIN AS, ALL DETAIL, and LEAD HIST. Below this, a 'Files List' section features a red-bordered button with a green plus icon and the text 'upload a new file'. Underneath the button is a large dashed box containing a blue cloud icon with an upward arrow and the text 'Drag & Drop Files Here or click to select files'.

Under Prospects or Members/Customers search and select the desired client. Click the Files tab above the customer name. You may now drag the file from the folder where it is saved on your PC and drop it in the files box or click the files box to search and select the file saved on your PC. The file will appear on the page as a link which can be selected to download the file. Also record of who added the file and when the file was added is located to the right of the file link.

# Email Login & Reset Password



To access this screen click search and select the desired client. Verify the client has an email address, if not click the edit pencil to enter one. Click the **All Detail** button.



Select the link for **Email Their Login & Reset Password**, a confirmation message *login details sent* will appear.

# View Check – In History

Member Account > All Detail > Check In > View Check In History

1/1/2016

Jan

2016

Sun Mon Tue Wed Thu Fri Sat

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Generate Report

→

12/31/2016

Dec

2016

Sun Mon Tue Wed Thu Fri Sat

				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Preset Date Ranges

Today	Yesterday	Prev 2 Days
This Week	Prev 7 Days	Prev 14 Days
This Month (Jan)	Jan 1 - 15	Jan 16 - 31
Prev Month (Dec)	Dec 1 - 15	Dec 16 - 31
Nov '16	Oct '16	Sep '16
2017	2016	2015

 export to Excel

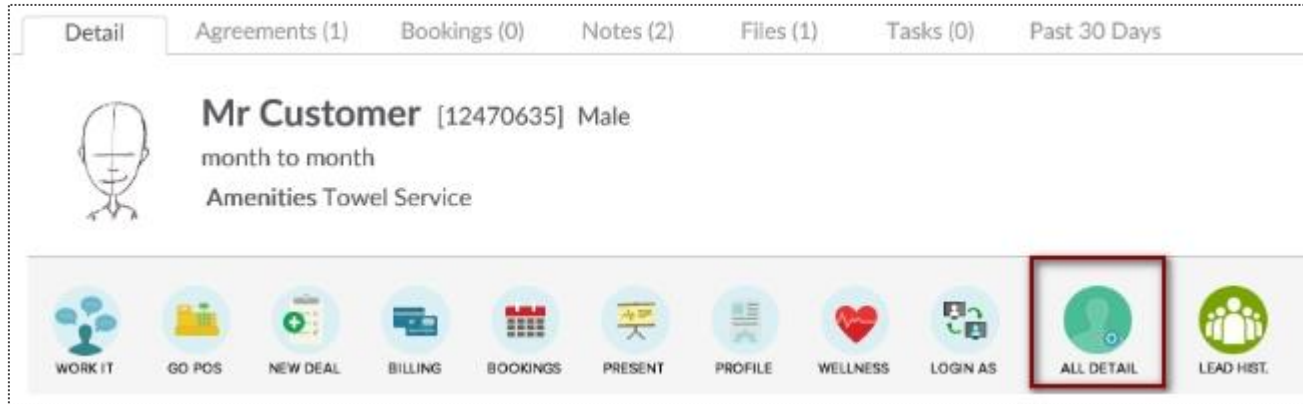
 export to PDF

2 Check-ins found.

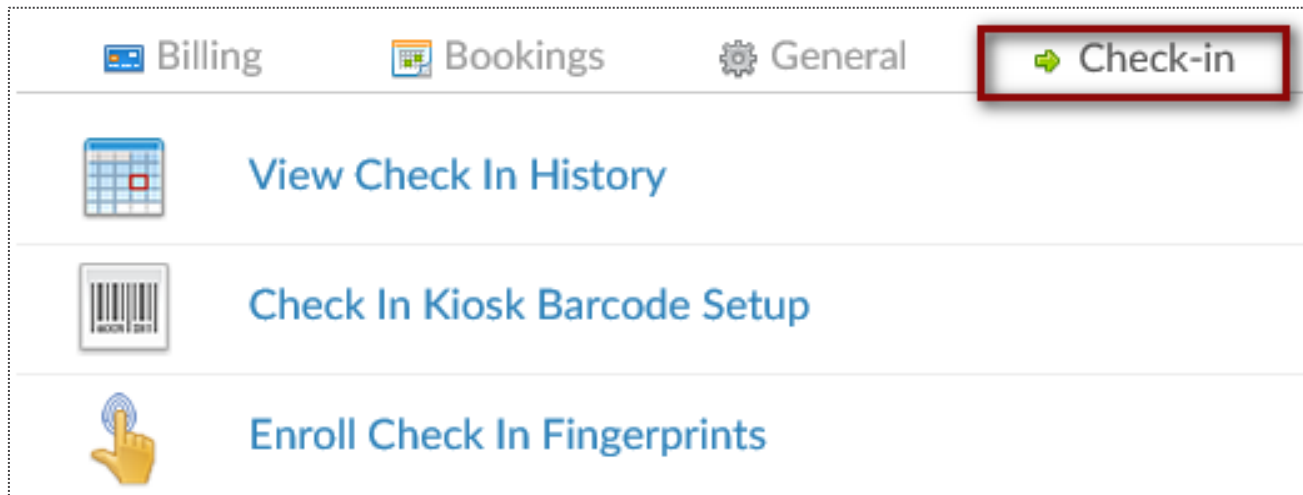
To generate this report, select the date range and click to **Generate Report**. The results will display on screen and show the number of check-ins, date of the check-ins, and the club location of the check-ins.

This data can also be exported by clicking on **export to Excel** or **export to PDF** and will contain the same information as the on screen report.

# Update Barcode/Fingerprint



Find the Prospect or Member/Customer you wish to assign or update a barcode for. Click on the **All Detail** button > **Check In** tab.



Choose if you are needing to update their barcode or fingerprint. This will be prompted by your Check In Web Kiosk settings under the Setup tab.

# Update Barcode/Fingerprint



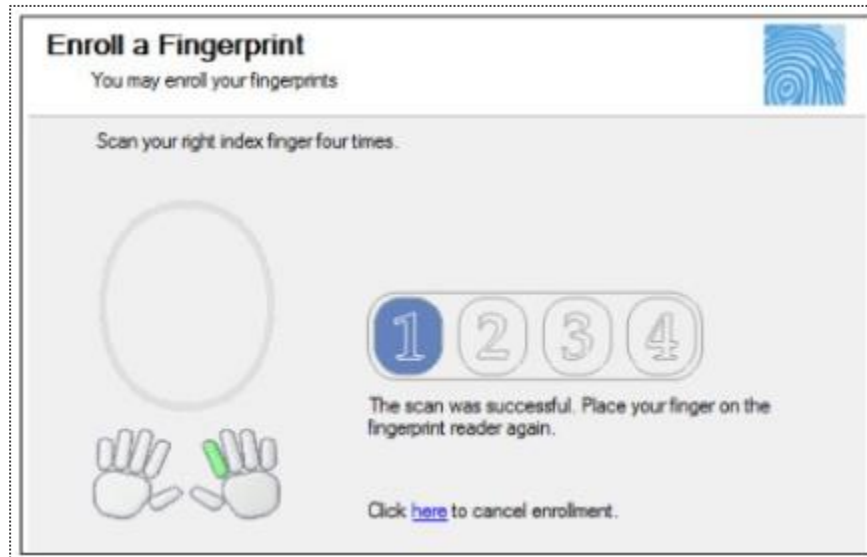
The interface for updating a barcode or fingerprint. It features three options, each with a barcode icon and a green plus sign:

- Manually Enter Barcode**: Includes a text input field and an **Update** button.
- Generate And Assign A Barcode**: A blue link.
- Scan And Assign An Existing Barcode**: A blue link.

**Manually Enter Barcode** - type in the barcode number

**Generate And Assign a Barcode** - Have ClubReady assign a barcode number

**Scan And Assign An Existing Barcode** - If you have a ClubReady approved keytag scanner (not orbital) you can scan the barcode after clicking this option



The interface for enrolling a fingerprint. It includes the title **Enroll a Fingerprint**, a sub-header **You may enroll your fingerprints**, and an instruction: **Scan your right index finger four times.**

Below the instruction is a large oval scan window and a row of four numbered circles (1, 2, 3, 4). The first circle (1) is highlighted in blue. Below the scan window is an illustration of two hands, with the right index finger highlighted in green.

Text below the numbered circles: **The scan was successful. Place your finger on the fingerprint reader again.**

At the bottom, it says: Click [here](#) to cancel enrollment.

Click on a digit to advance to the next step in the fingerprint enrollment process

The finger selected will highlight in green below the scan window.

Each time you scan the finger you will see the fingerprint show up in the oval window and the number will advance from none to 4. Scan the finger 4 times.

# Check In Web Kiosk

Setup > General > Check In Web Kiosk

Your Check-In Kiosk Can Be Found At  
<http://www.CRMembershipTest.clubready.com/kiosk>

The Kiosk Setup tab will show **Your Check-In Kiosk Can Be Found At** and copy the link (right click, choose Copy Link Address)

01:35:46 PM



An Admin / Provider Must Activate  
This Check In Kiosk  
With Their Username And Password  
Before It Can Be Used

cowner2829




Activate Check In Kiosk

To activate the kiosk, have a staff member with a login to the club type in their username, password and click the **Activate Check In Kiosk** button.




# Check In Web Kiosk

01:33:49 PM

 ClubReady

Client Check In

---

  
43864 065100

Please Scan Your Barcode

– OR –

Type Your Barcode And Press Enter

After logging in to activate the kiosk the screen will update requesting you check in a staff or client with the method you have setup.

To learn about the different Web Kiosk check in options, [click here](#).



# View Session Credit Status

Member Account > Bookings > Bookings & Session Credit Status

<u>Session Credits (0)</u>	Open Bookings (0)	Cancelled Ok (3)	Lost (0)	Completed (0)

This screen allows you to keep track of all session credits available on a member’s account and their current status.

**Session Credits Tab:** Pre-paid sessions that do not have any booking tied to them yet. If these paid sessions have an expiration date then they will be lost after that date if they remain unused.

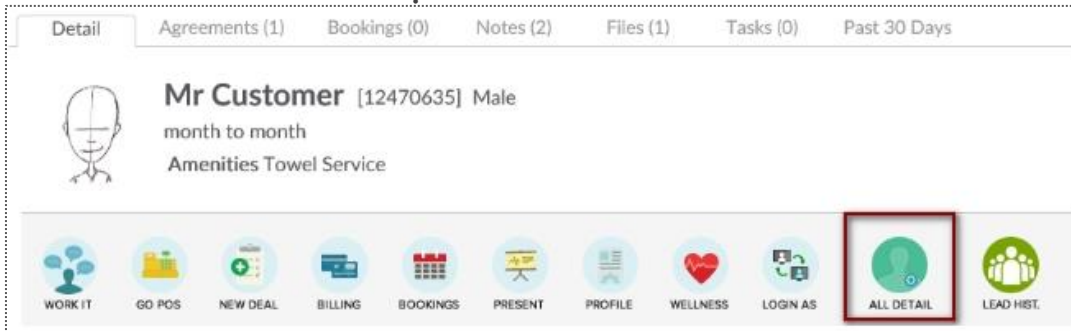
**Open Bookings Tab:** Bookings not yet completed, or bookings in the past that have not yet been logged to determine their status.

**Cancelled Ok Tab:** Bookings that were cancelled (or rescheduled) with no loss to the customer at the time of cancellation.

**Lost Tab:** Paid bookings that were lost due to either the session expiring before it was used, being cancelled outside the allowed cancellation policy for the session, or the customer not showing up for the session.

**Completed Tab:** Bookings that have been successfully completed

# Assign Primary Trainer

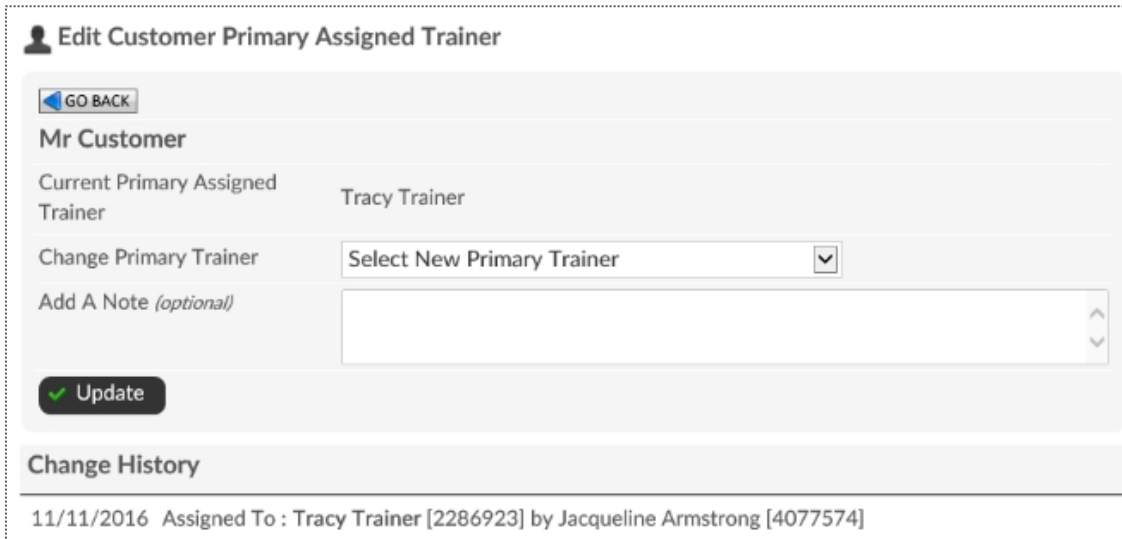


Detail Agreements (1) Bookings (0) Notes (2) Files (1) Tasks (0) Past 30 Days

**Mr Customer** [12470635] Male  
month to month  
Amenities Towel Service

WORK IT GO POS NEW DEAL BILLING BOOKINGS PRESENT PROFILE WELLNESS LOGIN AS **ALL DETAIL** LEAD HIST.

From the **Customer/Members** tab lookup, search your customer and select **All Detail > Bookings > Assign A Primary Trainer**



**Edit Customer Primary Assigned Trainer**

[GO BACK](#)

**Mr Customer**

Current Primary Assigned Trainer: Tracy Trainer

Change Primary Trainer:

Add A Note (optional):

[Update](#)

**Change History**

11/11/2016 Assigned To : Tracy Trainer [2286923] by Jacqueline Armstrong [4077574]

If a current trainer is assigned you will see the name of that trainer next to **Current Primary Assigned Trainer**. To add or change this choose an name from the **Select New Primary Trainer** drop-down. Click **Update**. Any changes made to a customer's primary trainer will be recorded and can be viewed in the change history at the bottom of the screen.



# Member Wellness Portal



# Member Wellness Setup



# Enable / Disable Features

Setup > General > General Settings

<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Heart ranges
<input type="checkbox"/> On <input checked="" type="checkbox"/> Off	Client Wellness	Calories route mapping
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Journalling
<input type="checkbox"/> On <input checked="" type="checkbox"/> Off	Client Wellness	Articles
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Nutrition <i>This must be enabled</i>
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Exercise logging
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Progress photos
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Progress reports
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Goal setting
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	Client Wellness	Fitness evaluations

<input type="checkbox"/> On <input checked="" type="checkbox"/> Off	General Client Login	Clients can see their payment history
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	General Client Login	Clients can see session credits history
<input type="checkbox"/> On <input checked="" type="checkbox"/> Off	General Client Login	Clients can update payment on file
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	General Client Login	Clients can edit their profile
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	General Client Login	Clients can view their check-in history
<input type="checkbox"/> On <input checked="" type="checkbox"/> Off	General Client Login	Clients can update their profile photo
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	General Client Login	Clients Can Delete Payment Profiles <i>Allows clients to delete payment profiles</i>
<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	General Client Login	Display "Customer Nickname" Field <i>Whether the Customer Nickname field sh</i>

Click on the **Features On/Off** tab to see the full list of features you can enable or disable. Click **On** for any features you want the client to have control over. Click **Off** anything you do not want them to have access to.



Login / Access

# Email Client Username / Password

Prospect / Member Tab > Locate User > All Detail

Detail

Agreements (4)

Bookings (0)


Notes (181)

Files (6)

Forms

Tasks (0)

Past 30 Days



**Mister Customer** [20061518] Male 36 years old

Term Member / Member since 11/15/2017 ends 9/22/2020

Amenities Tanning, Unlimited Classes, Multi- Club Access, Kid's Club

WORK IT

GO POS

NEW DEAL

BILLING

BOOKINGS

PRESENT

PROFILE

WELLNESS

LOGIN AS


**ALL DETAIL**


LEAD HIST.


Billing


Bookings


**General**


 Access Their Login Area


 Edit Their Profile


 Edit Membership Status


 Member Notes (181)


 Alerts (0)


 Amenities


 Choose From Available Presentations

 Forms

 Update ID Photo

 Send A Text Message

 Upload Files

 **Email Their Login & Reset Password**

Click on the General Tab. Select the link for **Email Their Login & Reset Password**, a confirmation message *login details sent* will appear.





# Extend a Client Login Date

Prospect / Members Tab > Locate User > Profile

Detail

Agreements (4)

Bookings (0)


Notes (181)

Files (6)


Forms


Tasks (0)


Past 30 Days





**Mister Customer** [20061518] Male 36 years old  
Term Member / Member since 11/15/2017 ends 9/22/2020  
Amenities Tanning, Unlimited Classes, Multi- Club Access, Kid's Club


WORK IT


GO POS


NEW DEAL


BILLING


BOOKINGS


PRESENT


PROFILE

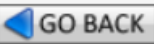
WELLNESS

LOGIN AS

ALL DETAIL

LEAD HIST.

 **Edit Customer Profile**



**Mister Customer** (Last Updated Friday, July 24, 2020 10:40 AM)

**General Details**

Login Active Until

☐ No time limit

11/1/2020 (mm/dd/yyyy) [view calendar](#)

The client's log in date can be affected by an invoice not being paid or the membership ending. After you search and select the client make sure that they are not past due or expired. If they are, you may want to address these issues before extending the date for the client login access.

## NOTES:

- If the client has a note about their membership ending you probably will want to sign them up for a new agreement.
- Depending on how your site is setup paying an invoice will extend the client's login access. After you take care of any past dues payments go onto the next step to verify whether login has been extended.

If you determine you want to manually update a clients login access you will need to click on the **PROFILE** button. Scroll down to the field **Login Active Until** and either check the box for **No time limit** or enter in a date in the future to allow a client to login until that time. To save your changes click the button for **Click To Update**.

# Login As Client Into The Wellness Portal (Staff)

Prospect / Members Tab > Locate User > Login As

Detail

Agreements (4)

Bookings (0)


Notes (181)

Files (6)


Forms


Tasks (0)


Past 30 Days





**Mister Customer** [20061518] Male 36 years old  
Term Member / Member since 11/15/2017 ends 9/22/2020  
Amenities Tanning, Unlimited Classes, Multi- Club Access, Kid's Club


WORK IT


GO POS


NEW DEAL


BILLING


BOOKINGS


PRESENT

PROFILE

WELLNESS

LOGIN AS

ALL DETAIL

LEAD HIST.

This allows you to view what this client will see when logging in and lets you make changes on their behalf. Confirm that you want to access their login area. Once logged in, you can view the client's Wellness Portal and make changes on their behalf.

**NOTE:** Any changes that you make within your client's Wellness Portal will be saved and show up when your client logs in!



# Fitness Evaluations

# Enable / Disable Fitness Evaluations


Setup > Wellness > Fitness Evaluations

Fitness Evaluation Tests		
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Written Summary <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Body Mass Index - BMI <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Resting Heart Rate <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Blood Pressure <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Percent Body Fat <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Body Size Measurements <input type="button" value="INFO"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Aerobic Capacity VO2 Max <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Muscular Endurance <input type="button" value="INFO"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Muscular Strength - 1RM <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Flexibility - Sit Reach <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	3 Minute Step Test <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Push Up Test <input type="button" value="INFO"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sit Up Test <input type="button" value="INFO"/>

To enable a test click the **ON** button. To disable a test, click on the **OFF** button. If you need more detail on a test click on the **INFO** button.

# Adding a Fitness Evaluation (Staff View)

Prospect / Member Tab > Locate User > Wellness

 **Add A New Fitness Evaluation**

[GO BACK](#)

**For Mister Customer**

What date is the new fitness evaluation to be logged for? (default is today)

Aug▼2020▼

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Fitness Evaluation Date


Friday, August 28, 2020

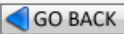
[Go To Next Step](#)

Select the link **Add A New Fitness Evaluation**. By default a fitness evaluation will be created for current day. If you want to enter a fitness evaluation performed on a previous day click on the correct month and day on the calendar. Click the button **Go To Next Step**.

# Adding a Fitness Evaluation (Staff View)

Prospect / Member Tab > Locate User > Wellness


 **Fitness Evaluation Entry**




**Mister Customer : Evaluation Date : Friday, August 28, 2020** [edit date](#)

Click on any evaluation to enter evaluation data for that test. Evaluation entries can be done in any order and it is not a requirement to complete all the tests. To view the evaluation report at any stage click on 'view fitness evaluation report'


**0 of 10 Steps Completed In This Evaluation**

 Written Summary


Add This Evaluation

 Body Mass Index - BMI

Add This Evaluation

 Resting Heart Rate

Add This Evaluation

 Blood Pressure

Add This Evaluation

Click **Add This Evaluation** button next to the test you wish to complete for the client.



# Health History Form



# Setup Health History Form

Setup > Wellness > Health History Form

## Health History Form Setup

The client health history form is found in the client login area. You can adjust what questions are asked and the order of questions. To re-order, drag & drop the question list below.

### Create A Question

Question

*eg are you a smoker?*

Response Type

Yes / No



Add The New Question

*Health History Form Design. Drag & Drop Questions To Rearrange Layout.  = edit*

### Your Exercise History



Do you smoke? 


☐ Yes ☐ No



Are you active? 

☐ Yes ☐ No



How often do you exercise? 



You will add your questions to the form one at a time. Each question can require a different type of response.

Response options include:

- Yes/No
- Single Line Text Entry
- Text Area Entry
- No Response (to use question as header text only)

After creating the question and selecting the response type, select **Add The New Question**.

While you will add the questions to your form one at a time, you can re-arrange the order at any time, by clicking on the question from the list and dragging it to a new order position.



# Accessing Health History Form

Prospects / Members Tab > Locate User > Wellness

Detail

Agreements (4)

Bookings (0)


Notes (181)

Files (6)

Forms

Tasks (0)

Past 30 Days



**Mister Customer** [20061518] Male 36 years old

Term Member / Member since 11/15/2017 ends 9/22/2020

Amenities Tanning, Unlimited Classes, Multi- Club Access, Kid's Club

WORK IT

GO POS

NEW DEAL

BILLING

BOOKINGS

PRESENT

PROFILE

**WELLNESS**

LOGIN AS

ALL DETAIL

LEAD HIST.

Home

Bookings

**My Goals**

Nutrition

Exercise

Journal

Reports

Articles

Discuss


My Profile

My Personal Goals

My Upcoming Events

My Health History

**My Targets**

 **My Health History**

When was the last time you exercised regularly?

Do you drink?

☐ Yes ☐ No

Click the link for **Health History**. This will allow for staff to complete under a customer's wellness options, or the customer can complete this form on their own via the wellness portal.




Profile

# View / Adjust Profile


## Wellness Portal

[Home](#) [Bookings](#) [My Goals](#) [Nutrition](#) [Exercise](#) [Journal](#) [Reports](#) [Discuss](#) [My Profile](#)

[My Profile](#) [My Purchases](#)

 **Update My Profile**

You can update your profile, including your login and password information below at any time.

 **Your General Details**

First Name *	<input type="text" value="Mister"/>
Last Name *	<input type="text" value="Customer"/>
Gender *	Male <input type="button" value="v"/>
Date of Birth	November <input type="button" value="v"/> 15 <input type="button" value="v"/> 1983 <input type="button" value="v"/>
Height	5 ft <input type="button" value="v"/> 11 in <input type="button" value="v"/>
Weight	<input type="text" value=""/> lbs
Target Weight	200 <input type="text" value=""/> lbs
Address	<input type="text" value="Orange Street"/>
City	<input type="text" value="Fruitville"/>
State	<input type="text" value="MO"/>
ZIP Code	<input type="text" value="63011"/>
Cell Phone	<input type="text" value="(314) 337-2181"/>
Phone	<input type="text" value=""/>

Click **My Profile** to view general details such as Name, Email, Phone, Emergency Contact and Login Information.


**NOTE:** Based on your Setup settings, users may or may not be able to adjust.

# Profile: My Purchases




## Wellness Portal

[Home](#) [Bookings](#) [My Goals](#) [Nutrition](#) [Exercise](#) [Journal](#) [Reports](#) [Discuss](#) [My Profile](#)

[My Profile](#) [My Purchases](#)

 **My Purchases**

[Completed \(48\)](#) [Planned \(2\)](#)

Date	Amount	Payment Details	Status
8/22/2020	\$50.00	Credit Card ending 1111 	Paid In Full
8/3/2020	\$0.97	From Existing Credit Balance 	Paid In Full
8/3/2020	\$54.03	Credit Card ending 1111 	Paid In Full

Click **My Profile** > **My Purchases** to view **Completed** transactions and those invoices **Planned** in the future. Click the PDF icon to view payment details.

**NOTE:** Based on your Setup settings, users may or may not be able to view.




# Scheduling







# Enable Service / Class to be Booked Online

Setup > Scheduling > Scheduling Settings

 **General Scheduling Settings**

**General Scheduling Settings**

Clients Can Book Online 	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Clients Can Cancel Online 	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Clients Can Reschedule Online 	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Enable Scheduling Text Messages 	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Clients Can See 'Cancelled Ok'	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
Clients Can See 'Lost Sessions'	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No

Select **YES** for **Clients Can Book Online**. You can also choose if they can **Cancel**, **Reschedule** and view their sessions. Click **Update** to save your changes.

# Enable Classes to be Booked Online

Setup > Scheduling > Classes/Group

Class Settings	<u>Booking Settings</u>	Instructors	Booking Flags	Categories
Attendees Must Book A Place In Class? ⓘ	<input checked="" type="radio"/> Yes <input type="radio"/> No <small>"No" indicates open attendance)</small>			
Max Attendees Per Class ⓘ	<input type="text" value="50"/> People			
Allow Customer Wait List For This Class?	<input type="radio"/> Yes <input checked="" type="radio"/> No			
Booking Policy ⓘ	<input type="text" value="48 hr policy"/> ▼			
Customers Can Book Online ⓘ	<input checked="" type="radio"/> Yes <input type="radio"/> No			

Each class should be enabled to be booked online through the wellness portal as needed. Click the edit pencil next to the existing class needed to be enabled for online booking. Under the **Bookings Settings** tab locate **Customers Can Book Online**. Choose **Yes** to enable this option. To save, click **Update Class Booking Settings**.


# Enable Services to be Booked Online

Setup > Scheduling > Services

## Existing Services






To change the display order of the services just drag and drop using the mouse. To edit the settings of a service click on the edit icon.

If a service is not active and it has existing bookings, then only booking cancellations will be available. New bookings and rescheduling will be disabled.

☒ Service Active (can accept new bookings) ☐ Service Not Active (no new bookings possible)  Edit Service Details

There are 7 Services Defined

To Reorder Drag & Drop With The Mouse

<input checked="" type="radio"/> Personal Training 		Credits To Book	
<input checked="" type="radio"/> Fitness Consultation 		Sales Consult	

Customers Can Book Online? 

Yes No

Each service should be enabled to be booked online through the wellness portal as needed. Click the edit pencil next to the existing service needed to be enabled for online booking. Under the **Service Settings** tab locate **Customers Can Book Online**. Choose **Yes** to enable this option. To save, click **Update Settings**.



# Make a Booking (Member View)

Home > Make A New Booking

Your Status For Today - Friday, August 28, 2020

 My Plan

Not Yet

 [Log Food](#)

 My Exercise

Not Yet

 [Log Exercise](#)

 My Journal

 Done

 [Write In Journal](#)

 My Reminders

None

 [Open Reminders](#)




My Bookings In The Next 2 weeks | [view all my bookings](#) | you have 34 available session credits |  [make a new booking](#)


Fri	Sat	Sun	Mon	Tues
Aug 28	29	30	31	Sep 1
4	5	6	7	8

# Make a Booking (Member View)


Home > Make A New Booking

 **Our Available Services & Classes**


**Personal Training**  
60min / 30min / 90min / 75min / 105min / 15min / 45min / 120min / sessions / Private personal training. One on one with the fitness coach.

 View Schedule


**Club Orientation**  
60min / 30min / 15min / sessions


 View Schedule


**Tanning**  
30min / 60min / 90min / 75min / sessions

 View Schedule

**PT Level 2**  
30min / sessions

 View Schedule

 **BodyPump Class**  
60 mins class

 View Class Schedule

To view the available trainers and times, your members will click **View Schedule**.

# Make a Booking (Member View)

Home > Make A New Booking


Select A Staff Member ⓘ

Tracy Trainer (3 bookings in the past with this staff member)

Test Demo (2 bookings in the past with this staff member)


Brad Pitt (No bookings in the past with this staff member)

Amy Test (No bookings in the past with this staff member)

 Tracy Trainer's Schedule - [Read Bio](#)

Feb 12 - Feb 18 2017

Time	SUN FEB 12	MON FEB 13	TUE FEB 14
4:15 AM			
4:30 AM			
4:45 AM			
5:00 AM			
5:15 AM			
5:30 AM			
5:45 AM			
6:00 AM			
6:15 AM			
6:30 AM			
6:45 AM			



**Personal Training**

CLOSE ✕

7:00 AM Monday, January 19, 2015

Timmy Trainer

Make A New Booking Select The Session Size Below

30 Mins Session - You have 6 session credits available ▾

Book 30 Mins Session : 7:00 AM - 7:30 AM

Session Cancellation Policy

All appointment cancellations and reschedules need to be made twenty-four (24) hours prior to the scheduled appointment time to not be considered a "no-show." In the event the client "no shows" for their scheduled session, the client will be charged for that session.

☒ Send Me A Confirmation Email To

mrcustomer@clubready.com

Make The Booking

Customers can select the trainer to view their availability. Areas in white are available for a booking to be scheduled. After selecting the available time period, the customer will need to confirm the session type, review the booking policy and select if they would like to receive a confirmation of the booking. Lastly, they will click on **Make The Booking**.




# Additional Features


# Progress Photos

## Wellness Portal

[Detail](#) [Agreements \(4\)](#) [Bookings \(0\)](#) [Notes \(181\)](#) [Files \(6\)](#) [Forms](#) [Tasks \(0\)](#) [Past 30 Days](#)

**Mister Customer** [20061518] Male 36 years old  
Term Member / Member since 11/15/2017 ends 9/22/2020  
Amenities Tanning, Unlimited Classes, Multi- Club Access, Kid's Club

[WORK IT](#) [GO POS](#) [NEW DEAL](#) [BILLING](#) [BOOKINGS](#) [PRESENT](#) [PROFILE](#) [WELLNESS](#) [LOGIN AS](#) [ALL DETAIL](#) [LEAD HIST.](#)


 **Customer Progress Photos**


[GO BACK](#)



**Mister Customer**

Click on any thumbnail below to view an individual picture. The customer has some additional tools in their area that allow them to edit & delete photos.

Showing Page **1** of **1** : Total of 2 Photo's

 **January 2018 (1)**

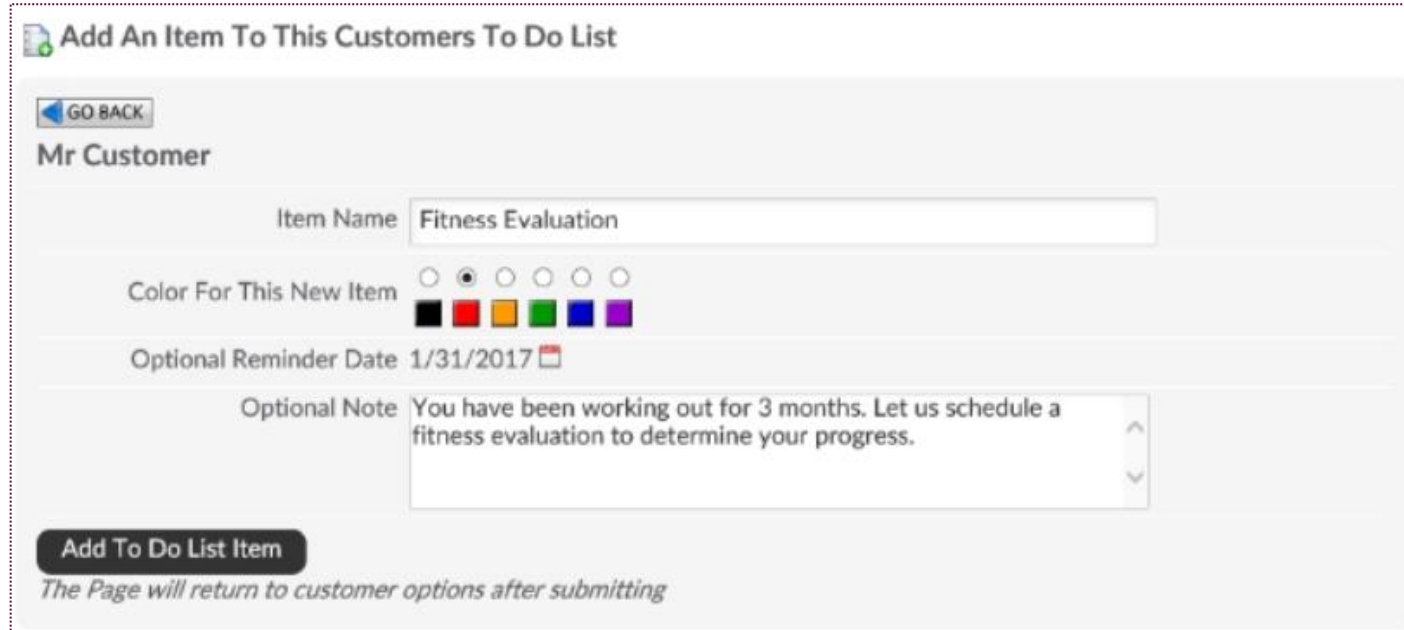
 **August 2018 (1)**



Select the link for **Progress Photos**. Click on the green thumbnail to expand and view the picture for the date it was uploaded.

# To Do's (Staff View)

Prospects / Members Tab > Locate User > Wellness



The screenshot shows a web form titled "Add An Item To This Customers To Do List". At the top left is a "GO BACK" button. Below it, the customer name "Mr Customer" is displayed. The form contains several fields: "Item Name" with the text "Fitness Evaluation"; "Color For This New Item" with six color selection circles (black, red, orange, green, blue, purple); "Optional Reminder Date" set to "1/31/2017" with a calendar icon; and "Optional Note" with the text "You have been working out for 3 months. Let us schedule a fitness evaluation to determine your progress." and a vertical scrollbar. At the bottom is a dark "Add To Do List Item" button and a note: "The Page will return to customer options after submitting".

Select the link for **Add A TO Do**. Enter the following information:

**Item Name** - The to do item the customer needs to complete.

**Color For This New Item** - If you select a color, it will display on their To Dos list.

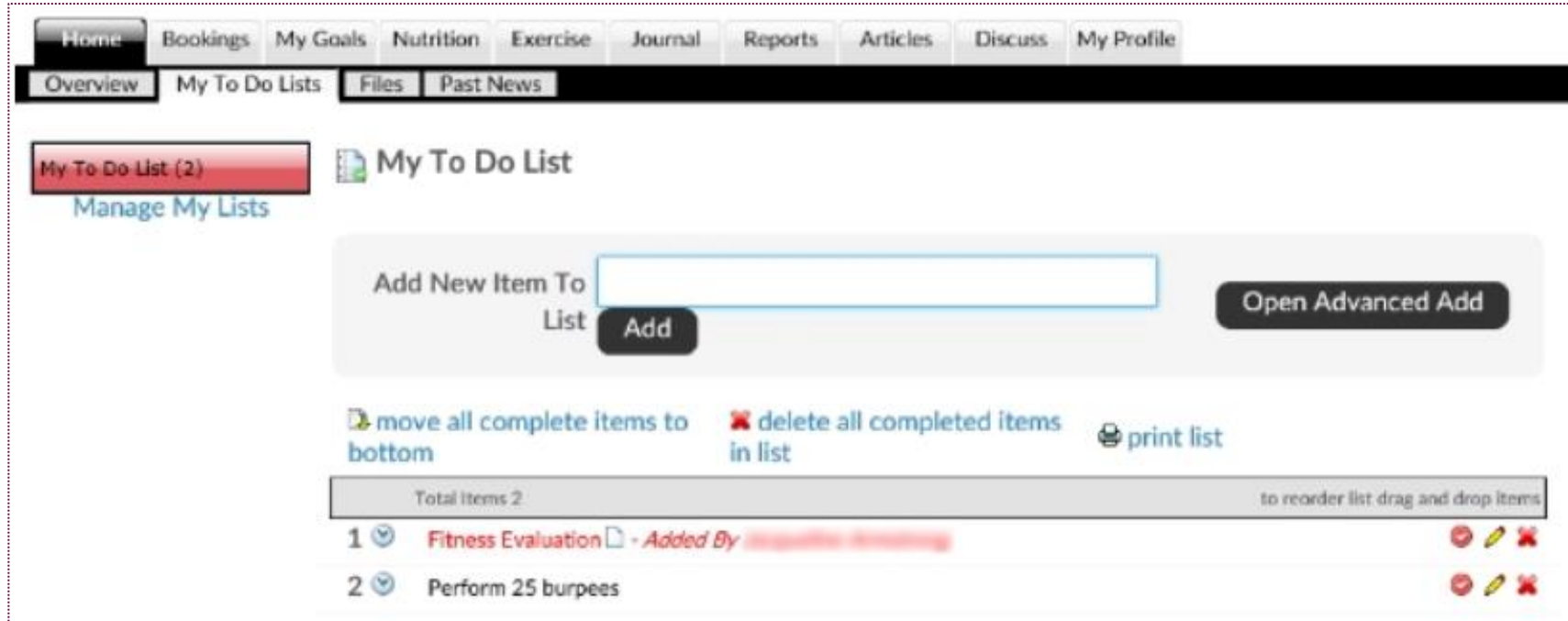
**Optional Reminder Date** - You can select from the calendar the date the customer needs to complete the assigned to do.

**Optional Note** - Type in here an optional note such as a description for the To Do.

To save your To Do item, click on **Add To Do List Item**.

# To Do's (Member View)

## Wellness Portal






Home Bookings My Goals Nutrition Exercise Journal Reports Articles Discuss My Profile

Overview My To Do Lists Files Past News









My To Do List (2)  
Manage My Lists

My To Do List

Add New Item To List

 move all complete items to bottom  delete all completed items in list  print list

Total Items 2 to reorder list drag and drop items


1		Fitness Evaluation	- Added By <i>incomplete</i>	  
2		Perform 25 burpees		  

This screen will show how the client will see the To Do your staff entered. Once your client logs into their portal, they will click on **Home > My To Do Lists**. The To Do entered will displayed at the bottom of the screen.

## Wellness Portal

[Home](#)
[Bookings](#)
[My Goals](#)
[Nutrition](#)
[Exercise](#)
[Journal](#)
[Reports](#)
[Discuss](#)
[My Profile](#)

[My Journal](#)
[My Progress Photo's](#)


**My Journal** [HELP](#)

Friday, August 28, 2020

Make A Written Journal Entry

B

I

U

Morning:

Ran 1.5 miles

Afternoon:

Chicken sandwich

Add Journal Entry

Log Journal Data

DEFAULT LOG

MY CUSTOM LOG

Friday, August 28, 2020

Weight

145

lbs

Log It

Water (click to log)

Multi-Vitamin (click to log)

Stress Level 1 = Low, 10 = High

1

2

3

4

5

6

7

8

9

10

Energy Level

1

2

3

4

5

6

7

8

9

10

Motivation Level

1

2

3

4

5

6

7

8

9

10

Journal Calendar [HELP](#)

Aug

2020

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Calendar Key

Selected Day

Entries Made To Your Journal

Entries Made To Custom Logs

Written Journal Entry

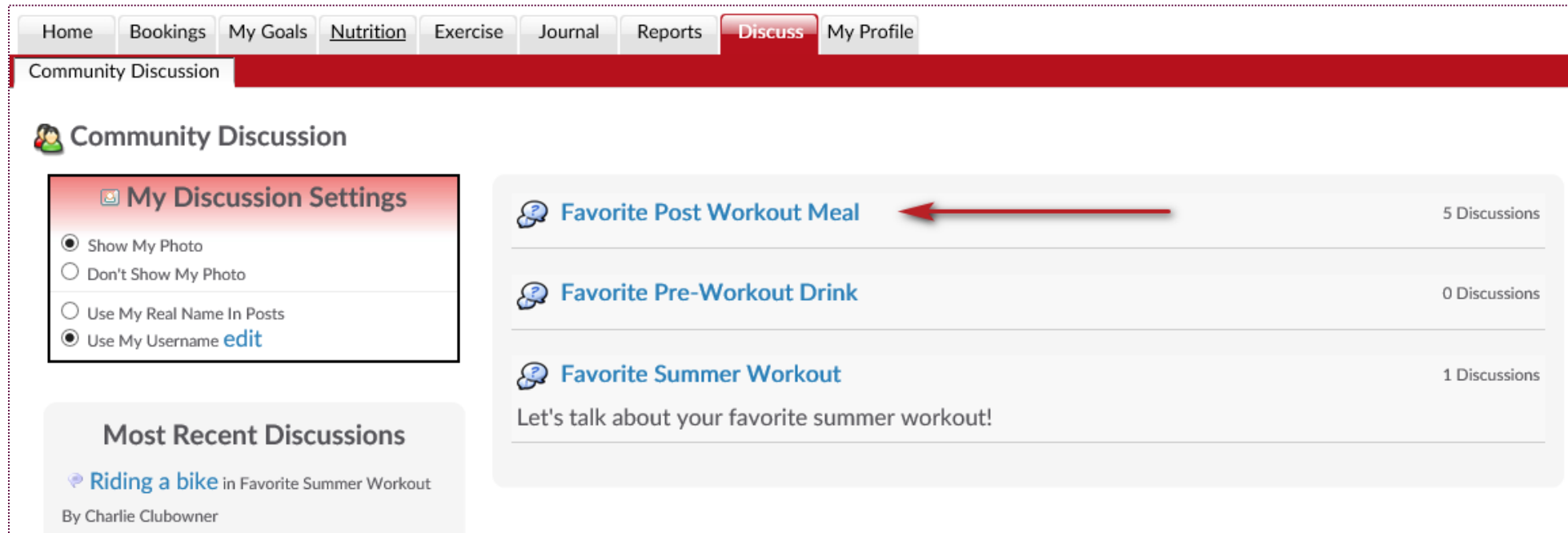
Weight Logged

This screen will allow the client to make a written journal entry to track their days, weight, water intake, etc.




# Discussion Forums


## Wellness Portal



Home Bookings My Goals Nutrition Exercise Journal Reports **Discuss** My Profile


Community Discussion


 Community Discussion


 **My Discussion Settings**


- ☒ Show My Photo
- ☐ Don't Show My Photo
- ☐ Use My Real Name In Posts
- ☒ Use My Username [edit](#)

**Most Recent Discussions**

 [Riding a bike](#) in Favorite Summer Workout  
By Charlie Clubowner

 [Favorite Post Workout Meal](#) 5 Discussions

 [Favorite Pre-Workout Drink](#) 0 Discussions

 [Favorite Summer Workout](#) 1 Discussions

Let's talk about your favorite summer workout!


To access and participate in the Discussion forum as a club member, log into the Wellness Portal and go to; **Discuss > Community Discussion**. To participate in a discussion, click on a current post. To begin a new post, click on **Add New Discussion** you will be able to add a new subject to your Discussion.





Point of Sale

# Point Of Sale

Main > POS


 Click To Lookup A Person

 Scan

 Last 5


\$0.00

Item	Quantity	Taxable	Price	Extended Price
------	----------	---------	-------	----------------

 Mister Customer [24062008]

\$89.00

0 Open Carts | [4 Paid Invoices](#) | [1 Future Invoice](#) | [1 Payment](#) | [Add Credit To Account](#)

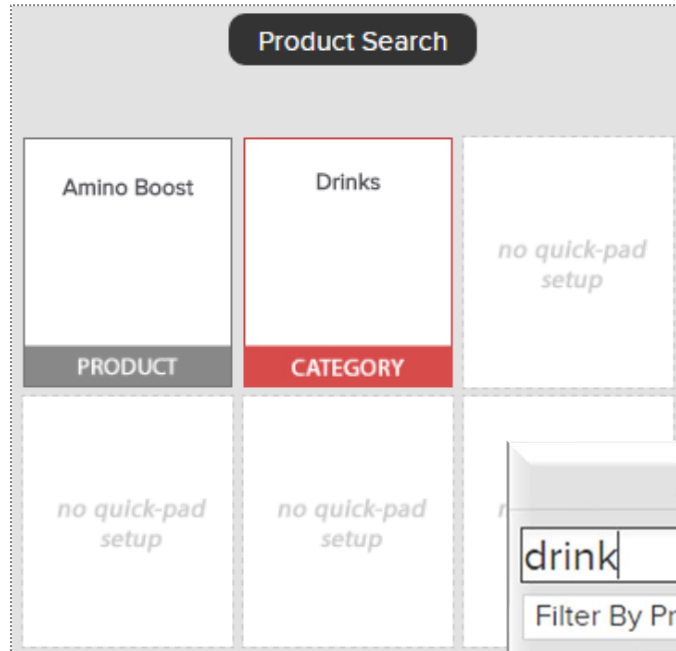
Item	Quantity	Taxable	Price	Extended Price
 Founders Unlimited Monthly Recurring Due 6/15/2018	1	-	\$89.00	\$89.00

The POS is used for taking payment on past due and future invoices as well as for selling merchandise. To pull a client into the POS, select the **Click to Lookup a Person** button.

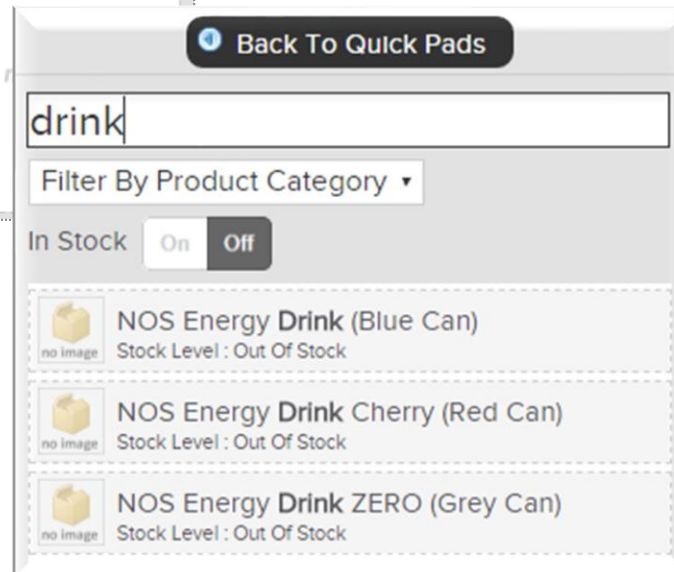
If the client has any invoices that are due, they will automatically populate in the POS shopping cart. You can also access the client's **Future Invoices** to take payment on an invoice not yet due. Any unfinished transactions can be resumed by selecting the **Incomplete Carts** button. Select **Add Credit To Account** if purchasing a gift card or promotional credits for the customer. **Paid Invoices** and **Payments** can also be selected from this screen.

# Selecting a Product

Main > POS



Select the individual product or choose a category. This can be done by selecting the quick pad or performing a **Product Search**. Clicking on the product will place it in the shopping cart.



# Editing an Checking Out

Once an item appears in the shopping cart, click on the item to make any adjustments that may be needed. When ready, select Checkout.

Default Sales Person: Current User

Select Discount  Promo Code ✓ Apply

Click To Lookup A Person

Scan

Last 5

\$15.00

Item	Quantity	Taxable	Price	Extended Price
<div><div><span>✓ Update</span> <span>✗ Remove Item</span></div><div>Assigned to Current User <span></span></div><div><div>Apply A Product Discount To \$15.00</div><div>5% Discount (\$14.25)</div><div>10% Discount (\$13.50)</div><div>15% Discount (\$12.75)</div><div>20% Discount (\$12.00)</div></div><div>✗ Cancel</div></div> <div><div>Boxing Gloves</div><div>1</div><div>15.00</div></div> <div><div>enter a note (at least 10 characters)...</div></div>				

Adjustments may include; modifying the quantity, price, applying a discount or removing the product from the shopping cart.

Clear Register

Reset All

CHECKOUT

Item Total	\$15.00
Sub Total	\$15.00
Sales Tax	\$0.00
TOTAL	\$15.00


When ready, click the **CHECKOUT** button to advance to the payment screen.

# Finalizing the Purchase

Select the appropriate payment method.

BALANCE DUE

\$15.00



+ ADD

123

456

789

0.

+ EXACT

✖ CLEAR ⓘ BILLS

Cash Tendered


\$0.00


CHANGE

\$0.00

[POS setup](#)


[my permissions](#)





Sale Assigned To +  Major Tom


Item	Quantity	Price
Boxing Gloves	1	\$15.00
Item Total		\$15.00
Sub Total		\$15.00
Sales Tax		\$0.00
<b>Order Total</b>		<b>\$15.00</b>
Change Due		\$0.00

Add Payments

  
CARD

  
BANK ACH

  
EXTERNAL

  
CHECK

Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

If a customer is paying by cash, select the quick cash amount or click PAD, to enter a specific dollar amount.

The sale will be assigned to the staff person currently logged in, however this person can be changed if needed. To change who the sale is assigned to, click on the existing name and then choose from a list of staff.

# Finalizing the Purchase

It is now time to complete the sale by processing payment.



The screenshot shows a checkout interface with a green header bar. In the header, there are four buttons: 'no receipt' (highlighted with a red box), a printer icon, an envelope icon, and a combined printer/envelope icon. To the right of these are three dark buttons: 'COMPLETE THIS SALE' (with a green checkmark icon and a red arrow pointing to it), 'RESET ALL' (with a red 'X' icon), and 'GO BACK' (with a blue circular arrow icon). Below the header is a light gray section with the text 'email receipt to' followed by a text input field containing 'customer@clubready.com'. At the bottom, the text 'Sale Assigned To' is followed by a green button labeled 'Charlie Clubowner' (with a person icon and a red arrow pointing to it).

At **CHECKOUT** select the payment method and who will get credit for the sale by clicking on the staff name.

Select if the customer wishes to have their receipt **emailed, printed, both or no receipt**.

Next, click **COMPLETE THIS SALE** to finalize purchase.

# Taking Payment: Decline Responses

Refer to common decline reasons that might occur when collecting payment from clients.

**Do not honor** - The system received a failed transaction message code from the issuing bank during the attempt to authorize the purchase request. There are many types of response codes, and “Do Not Honor” is the generic bucket used.

**Generic Decline** - A generic bank response which indicates simply that they are not willing to accept the transaction. The transaction may be declined due to a high level of recent activity on a card, a lack of matching AVS information, a card being over its limit, or a range of other reasons which only the bank can provide more information.

**Restricted Card** - The customer’s bank has declined the transaction as the card has some restrictions.

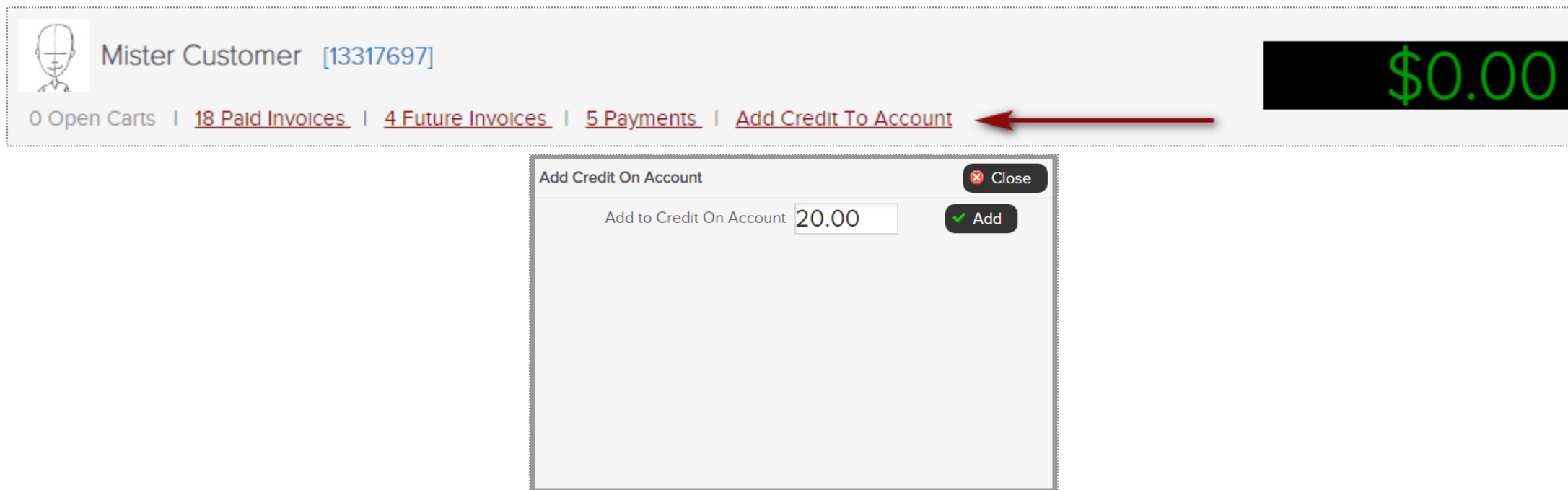
**Cardholder transaction not permitted** - This response indicates that the card issuing bank is declining the transaction for unspecified reasons. The response doesn't necessarily indicate that there is a problem with the card; however, it does indicate that the bank won't approve this transaction.

**Insufficient Funds** - An issue that occurs when an account does not have adequate capital to satisfy a payment demand.



# Point of Sale: Adding Credit on Account

Main > POS



The screenshot shows the POS interface for a customer named "Mister Customer" with ID [13317697]. The balance is displayed as \$0.00. The navigation bar includes links for "0 Open Carts", "18 Paid Invoices", "4 Future Invoices", "5 Payments", and "Add Credit To Account". A red arrow points to the "Add Credit To Account" link. Below the navigation bar, a modal window titled "Add Credit On Account" is open, showing a text input field with "20.00" and an "Add" button with a green checkmark. There is also a "Close" button with a red X icon.


The POS also allows for staff to apply a gift card to a member's account. First, select the customer receive the gift card. Click **Add Credit To Account**. Type the amount that is being applied.


Select **CHECKOUT** to continue. Different payment methods will be displayed. Select the correct method.

**Note:** If gift card is being paid with **Credit Card**, make sure to NOT save the account information since this is a one time purchase by another person.

# Declined Charges Log Report

Reports > Sales > Declined Charges Log

Declined Charges 

**All Charges** Unique Invoices 

**1/1/2018** **12/31/2018**

Jan 2018 Dec 2018

Mon Tue Wed Thu Fri Sat Sun

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31

Mon Tue Wed Thu Fri Sat Sun

1 2


3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23



24 25 26 27 28 29 30

31

Only Show Automatic (Drafted) Charges ☐ 

Excel Export Only ☐

**RUN REPORT**

**Declined Charges - ClubReady Membership Test Site (1865)**  
2/1/2018 - 2/28/2018

Date	Amount	Customer	User ID	Bill-To User ID	Cell Phone	Phone
2/11/2018	\$1.00	MEL GOODIE	13742541		(314) 456-2095	
2/11/2018	\$1.00	MEL GOODIE	13742541		(314) 456-2095	
2/11/2018	\$1.00	MEL GOODIE	13742541		(314) 456-2095	

Response	Ran By	Failed Attempts	Card Expires	Total Past Due
Unhandled Exception. Please Contact ClubReady Support: Unsupported BankAccountType: (1)	Melissa Goodrich			\$480.95

Choose the date range and use the optional filters. Using filters will allow you to further customize the results of this report. After the report's date range and criteria has been selected, click the **Run Report** button.

The details will display customer's name, decline reason, date, amount of the invoice, etc.



Inventory

# Bulk Upload Inventory

Reports > Products > Bulk Upload Inventory



Current Inventory

search for specific products...

Filter By Product Category

☒ Don't Show Products That Have Never Been Sold And Have No Stock Level

☐ Only Show Out Of Stock

☐ Show Product Image

export (also used as template for bulk adjust tool)

First, you will need to download the current inventory report to add the stock level for each item.

Navigate to **Reports > Products > Inventory**. Use the drop down box to **Filter By Product Category** and use checkbox options if needed.

To create an Excel export with all products listed then leave the drop down menu blank and uncheck **Don't Show Products That Have Never Been Sold And Have No Stock Level**.

Click on the Excel **export (also used as template for bulk adjust tool)** link.

# Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory

	A	B	C	D	E	F	G	H	I
1	CR Membership Training Site - Filtered Product Inventory Listing : 5/24/2016								
2	This file can be used for bulk inventory adjustments - format must remain the same. After adding adjustment entries in green columns save as .csv file								
3	ProductID	ProductCode	OtherProductCod	ProductName	CurrentInventor	InventoryValue	SetInventoryTo	IncreaseInventoryBy	DecreaseInventoryBy
4	121835	SKU121835		\$25 Gift Card	98	\$0.00			
5	101760	SKU18952		12oz Water	-26	\$0.00			
6	120105	SKU120105		Coconut Water	29	\$0.00			
7	101767	SKU23751		Credit on Account	50	\$0.00			
8	101773	SKU21484		Jamocha Xtra Protein Smoothie	-2	\$0.00			
9	101774	SKU19006		Mens TShirt Black	-28	\$0.00			
10	145815	SKU145815		Red Cheeks Tanning Lotion	-1	\$0.00			
11	31636	SKU31636		Water - corp	-1	\$0.00			

Open up the Excel file once it has been downloaded. Do not alter any columns or rows. The formatting must remain the same for the upload to work properly.

The Excel file will contain **Product Name**, **Current Inventory** and the following green columns you will need to adjust inventory:

**Set Inventory To**, **Increase Inventory To** or **Decrease Inventory To**.

**Note:** Increasing and decreasing inventory will override what you type into **Set Inventory To** so there is no need to type in multiple columns for the same product. Save the Excel file as a **.csv file**.

# Bulk Upload Inventory

## Tools > Products > Bulk Upload Inventory

This tool allows you to make bulk adjustments to inventory - for example when you do a physical inventory of your products in stock. You can either set the inventory to a specific count or you can adjust by specific increases or decreases. All changes are logged in inventory adjustment history.

Use [Current Inventory](#) report excel export to create a blank excel file template in the correct format. Even though some of the fields in that export are not used in the bulk upload - they still must be present in the excel file. Don't change the excel file format!

***TIP** - If there are many products that you do not sell (for example corporate products for clubs in a corp chain) - Then you can adjust the excel to remove any inventory you do not want to adjust and save it as a template to use later - The upload file does not have to have every inventory item in it - only the ones you wish to adjust.*

### Some key points before you upload

- You cannot have any quotations or commas in your data. In excel use CTRL-F before you save your .csv file to replace any quotes or commas. For example - do not enter 3200 as 3,200 as this will break the upload.

Select Inventory Adjustment CSV file from your local PC hard drive.

Choose File

No file chosen

Upload CSV File

After you click upload your file will be examined. No adjustments are made until you confirm on the next page.

Navigate to **Tools > Products > Bulk Inventory Adjust**. Click on **Choose file** and find the .csv file saved in the computer. Then click on **Upload CSV File**.

The file will be uploaded and inspected. If it is in the correct format and ready to be processed you can click on **Do Bulk Adjustment**.

All adjustments will appear on screen and the inventory has now been changed. These changes are logged and can be found in **Reports > Products > Inventory Change Log**.

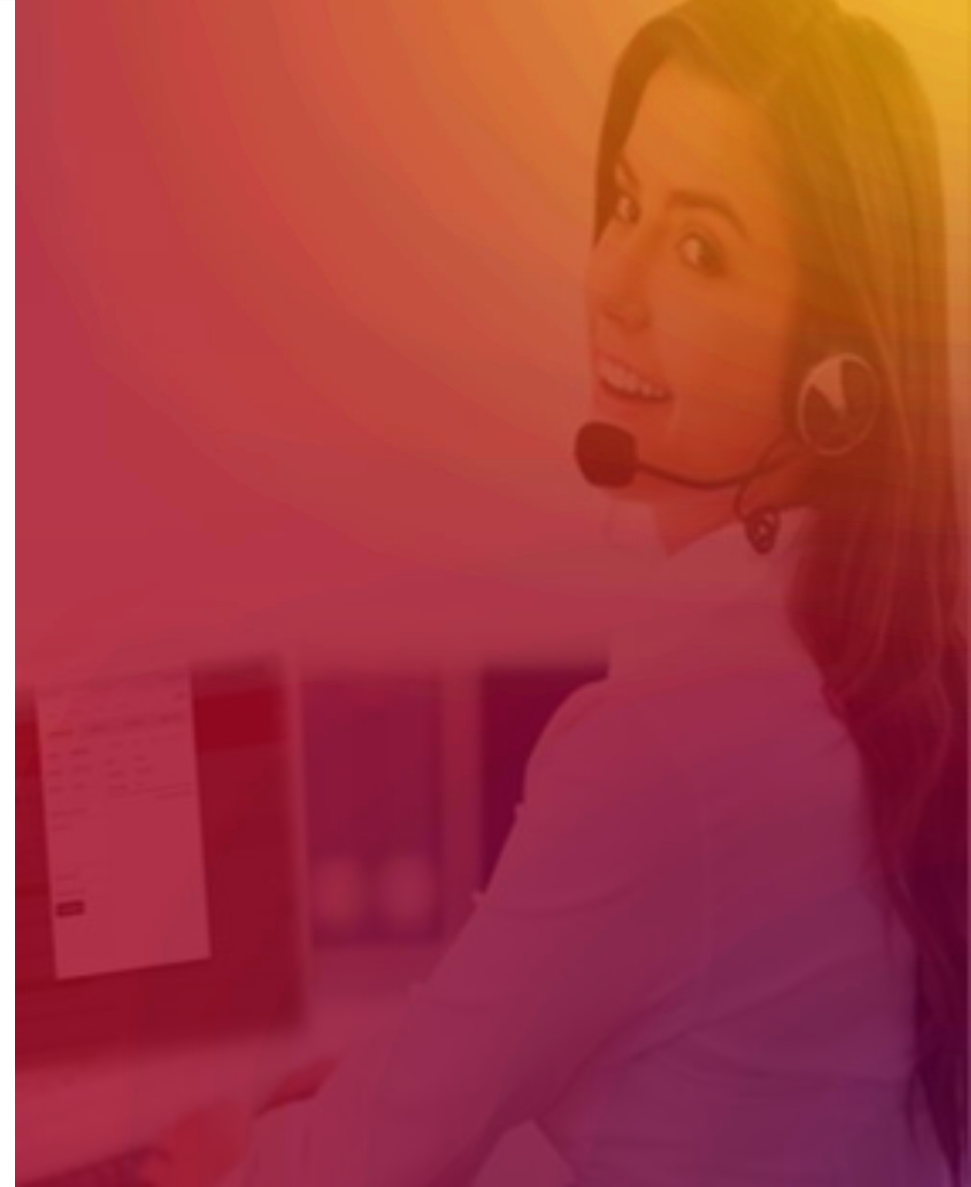


Past Due  
Communications

# What is Past Due Communication?

---

- Scheduled, consistent “touches” informing members of a past due balance owed to your clubs.
- An extension of customer service purely focused on billing.
- Friendly, low-pressure approach.
- Multiple channels of contact.
- Focused on helping you maintain a healthy draft.





# Cadence of Contact

---

CHANNEL	FREQUENCY
Outbound auto-dialed calls	1 time per week
Live agent calls	At least once every 7 days
Emails	1 per week
Text Messages	1-2 per week
Inbound volume generated from SMS, emails, and voicemails	Daily

# Make Sure We Can Reach Your Members



Capture all contact information from all members at POS.



Is your team entering real emails or filling in NA@NA.COM?



Are they capturing cell numbers?



More contacts = Increased likelihood of Payment!

# View My PDC Results

Real time results are available via the Gross Sales Detail Report in ClubReady.  
Reports > Sales > Gross Sales

## Gross Sales Summary - CRTraining Membership Site (2829)

1/1/2020 - 10/11/2020

	\$ Amount	%	Sales Tax	Total
<b>NET REVENUE</b>	<b>\$11,778.97</b>	<b>-</b>	<b>\$1,070.52</b>	<b>\$12,849.49</b>
<b>SUBTOTAL - Gross Revenue</b>	<b>\$11,968.97</b>	<b>-</b>	<b>\$1,089.92</b>	<b>\$13,058.89</b>
<b>Total Payments Made</b>	<b>\$12,115.05</b>	<b>100.0%</b>	<b>\$1,089.92</b>	<b>\$13,204.97</b>
<b>Client Credit Purchased</b>	<b>\$682.08</b>	<b>5.63%</b>	<b>-</b>	<b>\$682.08</b>
<b>Payments</b>	<b>\$10,601.97</b>	<b>87.5%</b>	<b>\$1,036.92</b>	<b>\$11,638.89</b>
Membership	\$8,970.97	84.6%	\$894.07	\$9,865.04
Membership Add On	\$0.00	0.0%	\$0.00	\$0.00
Services	\$1,330.00	12.5%	\$112.40	\$1,442.40
PT Services	\$50.00		\$4.00	\$54.00
Non-PT Services	\$1,280.00		\$108.40	\$1,388.40
<input checked="" type="checkbox"/> Fees	\$171.00	1.6%	\$17.05	\$188.05
Manual Invoices	\$130.00	1.2%	\$13.40	\$143.40
<b>Products</b>	<b>\$436.00</b>	<b>3.6%</b>	<b>\$21.90</b>	<b>\$457.90</b>
<input checked="" type="checkbox"/> <b>Past Dues</b>	<b>\$395.00</b>	<b>3.3%</b>	<b>\$31.10</b>	<b>\$426.10</b>
Membership	\$245.00	62.0%	\$22.70	\$267.70
Membership Add On	\$0.00	0.0%	\$0.00	\$0.00
Services	\$80.00	20.3%	\$8.40	\$88.40
PT Services	\$80.00		\$8.40	\$88.40
Non-PT Services	\$0.00		\$0.00	\$0.00
Fees	\$70.00	17.7%	\$0.00	\$70.00
Manual Invoices	\$0.00	0.0%	\$0.00	\$0.00
Products	\$0.00	0.0%	\$0.00	\$0.00

# Review Contacts Made with Members

Check the notes on their profile in ClubReady.

Past Dues Lookup

PDC

Search By Name


type name...

5 Matches

show recent | reset all

Chawla, Vandana	\$161.00
Gundersen, Kristin Kay	\$179.00
Hart, Dani	\$163.00
Naraghi, Farideh	\$736.00
Polek, Beth	\$136.00

DetailAgreements (1)Bookings (0)Notes (22)Pays (1)Tasks (0)Past 30 Days



Kristin Kay Gundersen [12338355] Female 30 years old

EFT Unlimited / Membership ended 4/27/2017 (was member for 6 months)

Amenities None

Owes \$179.00

WORK ITGO POSNEW DEALBILLINGBOOKINGSPROFILEWELLNESSLOGIN ASALL DETAILLEAD HIST

Key NoteImportant (0)All Notes (22)Add Note

No Notes FilterNo Date Filter

JUN 21st : 2:28 PM Email Blast : Kristin Kay Your Account is Past Due by : Melissa Knowles

Receipt Status: Delivered [view the email that was sent](#)

JUN 19th : 2:51 PM : Phone Call OUT : added by : Alexis Ali (General) :

PHONE CALL OUTCOME: got voicemail - left a message

JUN 15th : 11:39 AM : SYSTEM NOTE (General) : Collections SMS Notification (collections)

Your Club Pilates Del Mar account is past due for \$179.00. Please call 888-304-3885

JUN 14th : 3:53 PM Email Blast : Your Account is Past Due by : Karine Cesar

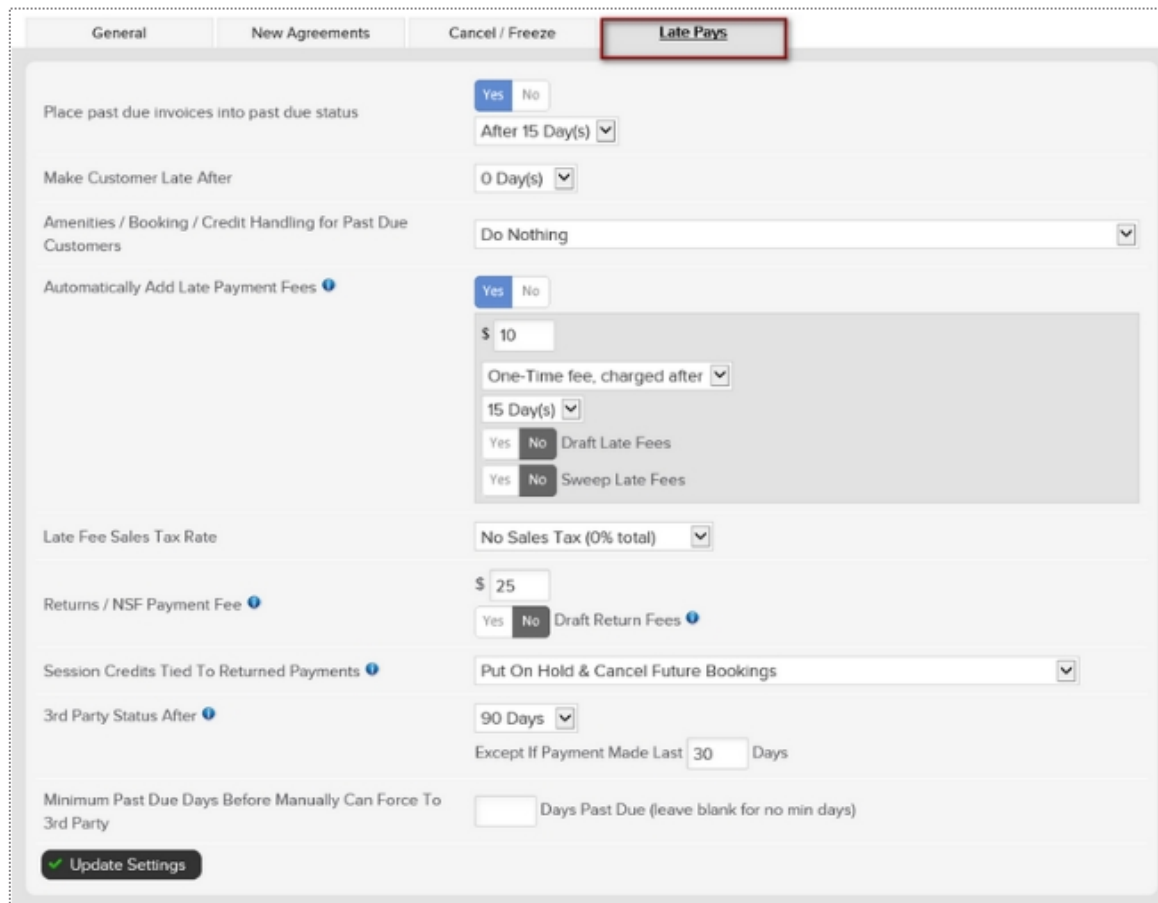
Receipt Status: Email Opened [view the email that was sent](#)

JUN 9th : 10:41 AM : Phone Call OUT : added by : Alexis Ali (General) :

PHONE CALL OUTCOME: got voicemail - left a message

# Managing Past Due Settings

Setup > Sales > Sales Settings



General New Agreements Cancel / Freeze **Late Pays**

Place past due invoices into past due status ☒ Yes ☐ No After 15 Day(s) ▼

Make Customer Late After 0 Day(s) ▼

Amenities / Booking / Credit Handling for Past Due Customers Do Nothing ▼

Automatically Add Late Payment Fees ⓘ ☒ Yes ☐ No

\$ 10

One-Time fee, charged after ▼

15 Day(s) ▼

☒ Yes ☐ No Draft Late Fees

☒ Yes ☐ No Sweep Late Fees

Late Fee Sales Tax Rate No Sales Tax (0% total) ▼

Returns / NSF Payment Fee ⓘ \$ 25

☒ Yes ☐ No Draft Return Fees ⓘ

Session Credits Tied To Returned Payments ⓘ Put On Hold & Cancel Future Bookings ▼

3rd Party Status After ⓘ 90 Days ▼

Except If Payment Made Last 30 Days

Minimum Past Due Days Before Manually Can Force To 3rd Party  Days Past Due (leave blank for no min days)

✓ Update Settings

This screen will allow you to adjust your Late Pays settings for customers who are not making their payments on time.

**Place past due invoices into past due status** - This option will allow you to control whether you want past dues to go into collections status. This is simply an internal invoice status and is not considered third party collections. If **Yes** is selected you will need to After how many days.

**Make Customer Late After** - You can set the day at which you consider a customer past due.

In addition, you can manage **Amenities / Booking / Credit Handling For Past Due Customers** and if you want to **Automatically Add Late Payment Fees**.

**3rd Party Status After** - This will allow you to specify after how many days the account will be moved to third party collections. This will result in the agreement being cancelled and all unpaid invoices considered in third party. These agreements will be placed into a third party report which you may use to collect internally or send to a third party company to collect from the customer on your behalf.



# Manage Past Due Member

Members > Manage Past Due Members > GO POS

☰ Past Dues Lookup

My Saved Filters (0) ▾

Search By Name ▾

mister

1 Matches

show recent | reset all

Customer, mister \$70.00

Detail

Agreements (2)

Bookings (0)

Notes (20)

Files (2)

Tasks (0)

Past 30 Days

Mister Customer [7436908] Male

PIF / Membership ended 12/30/2016 (was member for 13 months)

Amenities Tanning, Unlimited Classes, Towel Service, Multi- Club Access

Owes \$71.90  
3rd party \$220.00

WORK IT

GO POS

NEW DEAL

BILLING

BOOKINGS

PROFILE

WELLNESS

LOGIN AS

ALL DETAIL



LEAD HIST.


Select from the Past Due lookup the client from which you want to take payment. This will prompt their account details. Click on **GO POS** to automatically take payment at the Point of Sale.


# Manage 3<sup>rd</sup> Party Agreement


Member Account > Agreements > Full Details


[Detail](#) **[Agreements \(2\)](#)** [Bookings \(2\)](#) [Notes \(20\)](#) [Files \(0\)](#) [Tasks \(1\)](#) [Past 30 Days](#)


**Mrs Customer** [15044251] Female   
Base Membership / Membership ended 5/10/2017 (was member less than a month)  
Amenities None  
**3rd party \$39.00**


WORK IT


GO POS


NEW DEAL


BILLING


BOOKINGS


PRESENT

PROFILE



WELLNESS

LOGIN AS

ALL DETAIL

LEAD HIST.


**Agreements List**

5/4/2017	 Fully Paid	\$720.00 (#4881576) 1 x PT 60min 1 Sessions/wk - 3mo	<a href="#">Full Details</a>
5/4/2017	 Third Party Coll Since 5/10/2017	\$9.95 + \$40.00 in Fees (#4881564) 1 x Base Monthly	<a href="#">Full Details</a>

Select the client after locating them under the Prospects or Members tab, then click on the **Agreements** tab. Next click on **Full Details** located next to the agreement in 3rd party status.

# Manage 3<sup>rd</sup> Party Agreement

Member Account > Agreements > Full Details



Membership Agreement (#4881564)


(1) x Base Monthly

3

Third Party Collections on 5/10/2017 By Third Party Collections

Reinstate

Change 3rd Party Status

 3rd party dossier file

Total 3rd Party Contract Value	\$39.00
Total That Was Delinquent	\$0.00

Change Third Party Status

☒ Not 3rd Party - Still Cancelled

☐ Re-instate

☐ Settlement \$

add optional note..

Update or cancel

Click on the **Change 3rd Party Status** button

**Not 3rd Party - Still Cancelled:** Changes the status to cancelled, instead of 3rd party, and leaves all invoices cancelled as well.

**Re-instate:** Reinstates the customer's invoices that were placed in 3<sup>rd</sup> party status.





# Frequently Asked Questions

---

- Is PDC the same as collections?

No. Collections applies to accounts that have gone into default. The accounts we work are active or cancelled with balances no older than 90 days (or older with payments made within 30 days).

## LIFE CYCLE

1. Member's payment doesn't go through via draft.
2. ClubReady automatically reattempts the payment over the next two days.
3. Your club staff follows up on past due payments through day 9.
4. GYM HQ team starts working on day 10 and continues through day 90 (48 contact attempts).
5. Member goes into 3<sup>rd</sup> party collections and Swift starts working.

# Frequently Asked Questions

---

- **I have a member who has never been late before. Can we waive her late fees?**

Yes. Just let us know and we'll handle it. We understand that in *rare* circumstances amnesty is a must.

- **Do the PDC agents save new payment information to the member's Payment Profile?**

Yes. Unless the member requests that it not be saved (information good for one payment only).

- **I want to know how a PDC conversation went with one of my members. How do I get more info?**

Check the notes on their profile in ClubReady. We also record all calls. You can request a call recording by contacting the PDC department.

- **Where does the member go when they reach default and are in "3<sup>rd</sup> Party" status?**




To Swift via API.



# Schedule Management

# Day List

## Bookings > Day List > All



Friday, August 17, 2018


☐ Hide The Past


All (3)


Consults (0)


Services (0)


Classes


☐ Include photos in PDF 


 3:30 PM - 4:45 PM : Endurance (75 Mins) Class : Charlie Clubowner 47 Open Spaces


 Marissa


 Acosta





 Mister


 Customer

 Jon

 Customer



 6:00 PM - 6:45 PM : Connect Happy Hour Friday (45 mins) Class : No Instructor 50 Open Spaces

 7:30 PM - 8:30 PM : Classic (60 Mins) Class : Ken Stuttford 50 Open Spaces

17

AUG 2018

✓ today

tomorrow

Aug

2018

Mon

Tue

Wed

Thu

Fri

Sat

Sun




		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

From here you are able to view all scheduled bookings for the day. To change the date you are viewing, use the calendar option on the right side of the screen.

This screen will give you an indicator if it is the client's first booking. Keep an eye out for the red box saying 1<sup>st</sup>.

# Day List

## Bookings > Day List > Classes




Friday, August 17, 2018

All (3)

Consults (0)

Services (0)


**Classes**


☐ Include photos in PDF 


Filter By Name


Filter by Status 


All




 refresh

 **3:30 PM : Endurance (75 Mins) - (48 Open Spaces)**




 Jon Customer

WORK IT

 Bryan Frisina

Show


No Show

 Marissa Acosta


WORK IT

Show

No Show


 Mister Customer

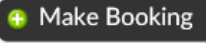
WORK IT

 Timmy CycleStar

Show

No Show

 **6:00 PM : Connect Happy Hour Friday (45 mins) - (50 Open Spaces)**



From the **Day List > Classes** tab you are able to book a client into a class click on the **Make Booking** button next to the class the client wishes to attend. The number of spaces available is provided next to each class name.

# Classes: Add a Class to the Schedule

Bookings > Classes

TIME / DATE	<div><div><div><div>+</div><div>ADD A CLASS</div></div></div><div>MON JAN 22</div></div>	<div><div><div><div>+</div><div>ADD A CLASS</div></div></div><div>TUE JAN 23</div></div>
6:00 AM	<div><div>50</div><div>Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div></div>	<div><div>50</div><div>Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div></div>
8:00 AM		
9:00 AM	<div><div>50</div><div>Connect (45 Mins) 9:00 AM - 9:45 AM No Instructor</div></div>	

Locate and select the day you want to add the class on the schedule. Click **ADD A CLASS**.

MON JAN 22nd

Schedule A Class  
Monday, January 22, 2018  
Choose A Class Type

Intro Ride (30 Mins)

Classic (60 Mins)

Classic (45 Mins)

Connect (60 Mins)

Connect (45 Mins)

Performance (60 Mins)

Performance (45 Mins)

Endurance (75 Mins)

Endurance (60 Mins)

Endurance (45 Mins)

Now **Choose A Class Type** for the date selected.

# Classes: Add a Class to the Schedule

Bookings > Classes

MON JAN 22nd

Schedule A 60 Mins  
Classic (60 Mins) Class  
Monday, January 22, 2018

add an optional additional class name

Names Used Before For This Class Type

Mashup Monday!

note

 - clients will see this (optional) additional class name on their schedule in their login area or published on your site - to change this so they do not see it go to [classic \(60 mins\) class setup](#)

Select A Class Instructor

Charlie Clubowner  
Demo Login  
Choose The Instructor Later

Back

Type or select if you want to use a secondary name for the class for members to view when they book into the class.

MON JAN 22nd

Schedule A 60 Mins  
Classic (60 Mins) Class  
Monday, January 22, 2018

add an optional additional class name

Names Used Before For This Class Type

Mashup Monday!

note

 - clients will see this (optional) additional class name on their schedule in their login area or published on your site - to change this so they do not see it go to [classic \(60 mins\) class setup](#)

Select A Class Instructor

Charlie Clubowner  
Demo Login  
Choose The Instructor Later

☒ Normal Work Hours Only

Available Start Times

7:00 AM (morning)  
7:15 AM (morning)  
7:30 AM (morning)

Yes No Duplicate This New Class [HELP](#)

Schedule The Class

Assign instructor to the class.

Select the Start time for the class and click **Schedule This Class** to add your class to the schedule.

# Classes: Schedule a Class Booking

Bookings > Classes

TIME / DATE	<div><div><div><div></div></div><div>ADD A CLASS</div></div></div> MON JAN 22	<div><div><div><div></div></div><div>ADD A CLASS</div></div></div> TUE JAN 23
6:00 AM	<div><div>50</div><div>Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div></div>	<div><div>50</div><div>Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div></div>
8:00 AM		
9:00 AM	<div><div>50</div><div>Connect (45 Mins) 9:00 AM - 9:45 AM No Instructor</div></div>	

Locate and select the class you want to book customer into. Click the option to **Make A New Booking**.

MON JAN 22nd

Classic (60 Mins) Class  
6:00 AM - 7:00 AM  
Demo Login

Book This For  
Mr Customer

Note : Mr has no available paid credits for this type of booking but per Rides session credit rules, an available Ride Credit Class session credit will be used to make this booking

Customer Notification

☒ Send Mr An Email To  
customer@email.com

☐ Send A Text Message (requires credits)

Optional Internal Note (Mr will not see it)

Make The Class Booking For Mr

Back

Use the search box to locate your client. **Send An Email To** or **Send A Text Message** to notify your client of their booking.

Select **Make The Class The Booking** to complete.

**Note:** Only staff with adequate permissions may book a member into a service without credits.





# Classes: Schedule a Booking After Class Has Started

Bookings > Day List

Wednesday, November 4, 2020 Hide The Past

All (2) Consults (0) Services (0) Classes Include photos in PDF

7:00 AM - 7:30 AM : Small Group Class : Frontdesk Felicity 2 Bookings

John Doe 1st Adam Smith

4 NOV 2020

today tomorrow

Nov 2020

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

Locate and select the class you want to book customer into. You can also select a specific date from the calendar.

**NOTE:** Only staff with adequate permissions may book a member into a class scheduled in the past.



# Classes: Schedule a Booking After Class Has Started

Bookings > Day List

## WED NOV 4th

✔ This Class Is Now Over

7:00 AM - 7:30 AM  
Small Group Class (#36387298)  
[add an additional class name](#)  
Location Type: Physical   
Max Attendees : 3 People

With Frontdesk Felicity  
  

Change Instructor

Cancel This Class

Make A New Class Booking

Bookings (2) | Email

☐ Show Photos

1. [John Doe](#)  
Booking# [170809166](#)

Show No Show

2. [Adam Smith](#)  
Booking# [170809210](#)

Show No Show

Click the option to **Make A New Booking**.

Use the search box to locate your client. **Send An Email To** or **Send A Text Message** to notify your client of their booking.

Select **Make The Class The Booking** to complete.

**NOTE:** Only staff with adequate permissions may book a member into a class set in the past.

# Classes: Adding Credits to Account

Member Account > Bookings

Detail

Agreements (1)


Bookings (0)

Notes (40)


Files (0)


Tasks (2)


Past 30 Days





**Mister Customer** [13317697] Male 39 years old  
Bronze Member / Member since 2/2/2017 ends 12/31/2018  
Amenities Tanning, Towel Service


 WORK IT


 GO POS


 NEW DEAL


 BILLING


 BOOKINGS


 PRESENT

 PROFILE


 WELLNESS


 LOGIN AS

 ALL DETAIL

 LEAD HIST.

To access this screen search and select the desired client.

 Customer Booking Overview

 GO BACK

Mister Customer

Session Credits (5)


Open Bookings (0)


Cancelled Ok (0)


Lost (2)

Completed (17)

'Session Credits' are pre-paid sessions that do not have any booking tied to them yet. If these paid sessions have an expiration date then they will be lost after that date if they remain unused

 view session credit add / delete history






 export full session / booking event history

 manually add session credits

To start manually adding sessions click **manually add session credits**. Choose the **quantity**, **session credit type** and **session expiration date**.


# Grid View: Schedule a Service


Bookings > Grid View

	NOW 27th	Fri 28th	Sat 29th	Sun 30th	Mon 31st	Tue 1st	Wed 2nd	Thu 3rd	Fri 4th	Sat 5th
	FRONTDESK FELICITY Front Desk Staff 		Tracy Trainer Trainer 							
Time										
7:00 AM									7:00 AM	
8:00 AM									8:00 AM	


1-on-1 services are scheduled via the Grid View. Select the date and click on the beginning time block under the provider performing the service.

### THU JAN 5th


8:00 AM - 8:30 AM  
Tracy Trainer  
Personal Training 30 Mins Session  
Book This For  
Mr Customer 


  
Notify Mr

☐ Send Mr An Email To

☐ Send A Text Message  No Cell Phone

Optional Internal Note (Mr will not see it)

 Make The Booking For Mr





 Back

Click the **Add New Booking** button. Select the desired service and use the search box to search for your client.  
**Send An Email To** or **Send A Text Message** to notify your client of their booking.  
Select **Make The Booking** to complete.


**Note:** Only staff with adequate permissions may book a member into a service without credits.


# Grid View: Cancel a Booking

Bookings > Grid View


 organize	FRONTDESK FELICITY Front Desk Staff 	Tracy Trainer Trainer 
Time		
7:00 AM		
8:00 AM		 M.Customer Personal Training

Select the session you wish to cancel and a window will open with management options.

 Mr Customer [ID 2311063] WORK IT


 Personal Training 30 Mins Booking #40329770

Thursday, January 5, 2017 8:00 AM with Tracy Trainer

 This session finished 5 hrs ago - has not yet been logged

[Detail](#) [Notes \(0\)](#) [Cancel](#) [Re-Book](#) [Log Off](#)

Per Cancellation Policy - Customer will lose this session unless not customers fault

☒ Mr Customer wants to cancel ( loses session credit)

☐ Cancellation is not Mr Customer's fault (does not lose session credit)

Notification

☒ Send An Email To

☐ Send A Text Message (requires credits)





Optional Internal Note

[Cancel This Booking](#)


Select either **Customer wants to cancel** (client loses session) or **Cancellation is not Customer's fault** (client retains session).


# Grid View: Manually Log a Session


Bookings > Grid View

	<b>FRONTDESK</b> <b>FELICITY</b> Front Desk Staff 	<b>Tracy</b> Trainer Trainer 
<b>Time</b>		
<b>7:00 AM</b>		
<b>8:00 AM</b>		 <b>M.Customer</b> Personal Training

Select the session you wish to log off and a window will open with management options.





















**Mr Customer [ID 2311063]** WORK IT


**Personal Training 30 Mins Booking #40329770**

Thursday, January 5, 2017 8:00 AM with Tracy Trainer  
 This session finished 5 hrs ago - has not yet been logged

[Detail](#) [Notes \(0\)](#) [Cancel](#) [Re-Book](#) [Log Off](#)

**Previous 10 Bookings**  
*(mouse over icons for more info)*

Date	9/21	7/2	6/8	6/8	6/5	5/13	4/3	4/1	10/24	10/16
Shown										
Checkin										

**Customer Validation**  
*No customer check-in logged*  
*No Customer Booking Confirmation*  
 A staff member with sufficient permissions can always change the payroll status later of this booking.

**Click To Select Status**  
☒ Booking Completed Successfully ☐ Customer Did Not Show Up




**Optional Note**  
*(Client Does Not See This Note)*  
Booking #40329770 Note 1/5/2017 Fitness

[Log The Booking](#) [Log The Booking And Go To POS](#)

To log a booking click the **Log Off** tab.  
Select whether to log the session as successfully completed or as a no show. Click **Log This Booking** to complete the process.

# Block Time as Unavailable


Bookings > Grid view

	NOW 27th	Fri 28th	Sat 29th	Sun 30th	Mon 31st	Tue 1st	Wed 2nd	Thu 3rd	Fri 4th	Sat 5th
	<b>FRONTDESK FELICITY</b> Front Desk Staff				<b>Tracy Trainer</b> Trainer					
Time										
7:00 AM									7:00 AM	
8:00 AM									8:00 AM	

Locate the day and time you wish to mark as unavailable and click on the calendar to open your options.

### MON OCT 31st

8:00 AM  
Tracy Trainer

 Block Out Some Time

How Long ?

1 Hour | 2 Hours | 3 Hours | 4 Hours | All Day

15 mins ..... (8:00 AM - 8:15 AM)

30 mins ..... (8:00 AM - 8:30 AM)

45 mins ..... (8:00 AM - 8:45 AM)


1 hr ..... (8:00 AM - 9:00 AM)


1 hr 15 mins ..... (8:00 AM - 9:15 AM)

Add Optional Detail

Add Comment Here

☐ Repeat this blocked out time for all staff if they are not booked

 Make Unavailable

 Back

Choose the duration of time to mark as unavailable. You may choose the color for the unavailable period to display on your schedule and can also include a comment about the unavailable period. There is an option to repeat the unavailable period as well. Select **Make Unavailable**.

# My Session History

## Bookings > My Session History

My Logged Session History

11/1/2016

Nov

2016

Sun Mon Tue Wed Thu Fri Sat  
1 2 3 4 5  
6 7 8 9 10 11 12  
13 14 15 16 17 18 19  
20 21 22 23 24 25 26  
27 28 29 30

11/30/2016

Nov

2016

Sun Mon Tue Wed Thu Fri Sat  
1 2 3 4 5  
6 7 8 9 10 11 12  
13 14 15 16 17 18 19  
20 21 22 23 24 25 26  
27 28 29 30

Preset Date Ranges

Today

Yesterday

Prev 2 Days

This Week

Prev 7 Days

Prev 14 Days

This Month (Jan)

Jan 1 - 15

Jan 16 - 31

Prev Month (Dec)

Dec 1 - 15

Dec 16 - 31

Nov '16

Oct '16

Sep '16

2017

2016

2015

Note : Only sessions that have been logged are included in this report.

Generate Report

0 Sessions, 2 Classes

export

#ID	Date	Time	Customer	Session Type	Pay \$	Status
-	11/1/2016	8:00 AM - 9:00 AM	2 Class Attendee(s)	FRONTDESK FELICITY Fundamentals of Yoga Class	\$20.00	Primary Instructor
-	11/17/2016	10:00 AM - 11:00 AM	1 Class Attendee(s)	FRONTDESK FELICITY Pilates Class	\$10.00	Primary Instructor
TOTAL					\$30.00	

Select the dates you wish to generate the report for by clicking on the to and from calendar or choosing a Preset Date Range. Click **Generate Report**. Your results will show on the webpage and includes the booking ID, date and time of the booking, customer name, type of session, your pay for the booking, and the status of the booking.

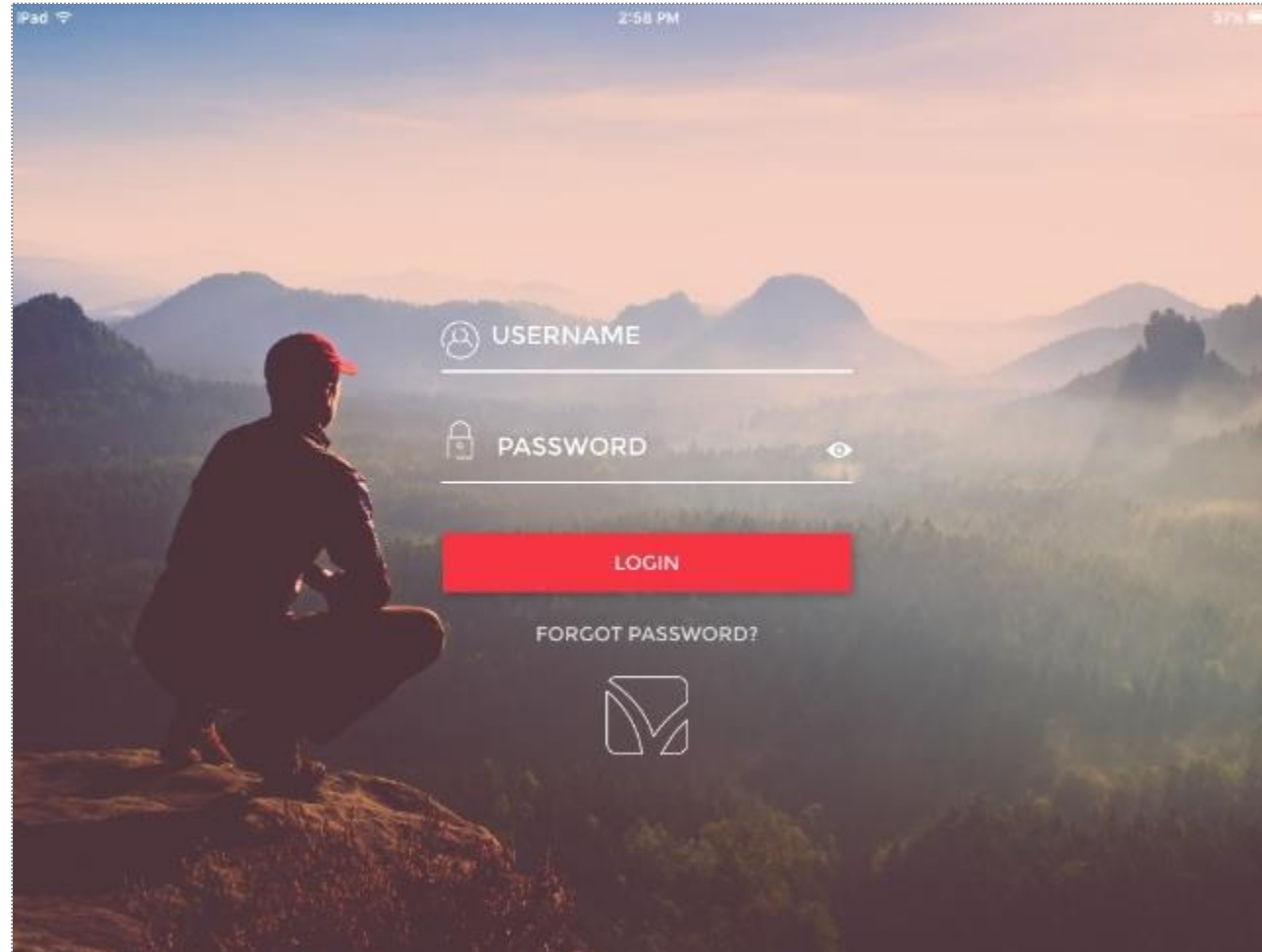




Apps

# ClubReady Class Kiosk App: Login Screen

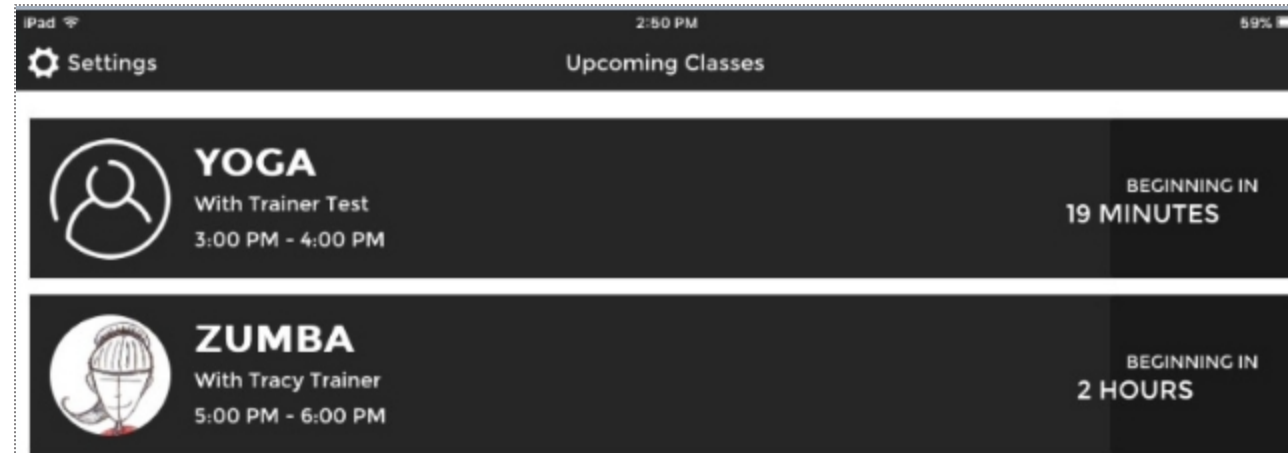
Use your staff login and password to access the ClubReady Class Kiosk App





# ClubReady Class Kiosk App: View Upcoming Classes

After logging in, you will see a list of all upcoming classes.





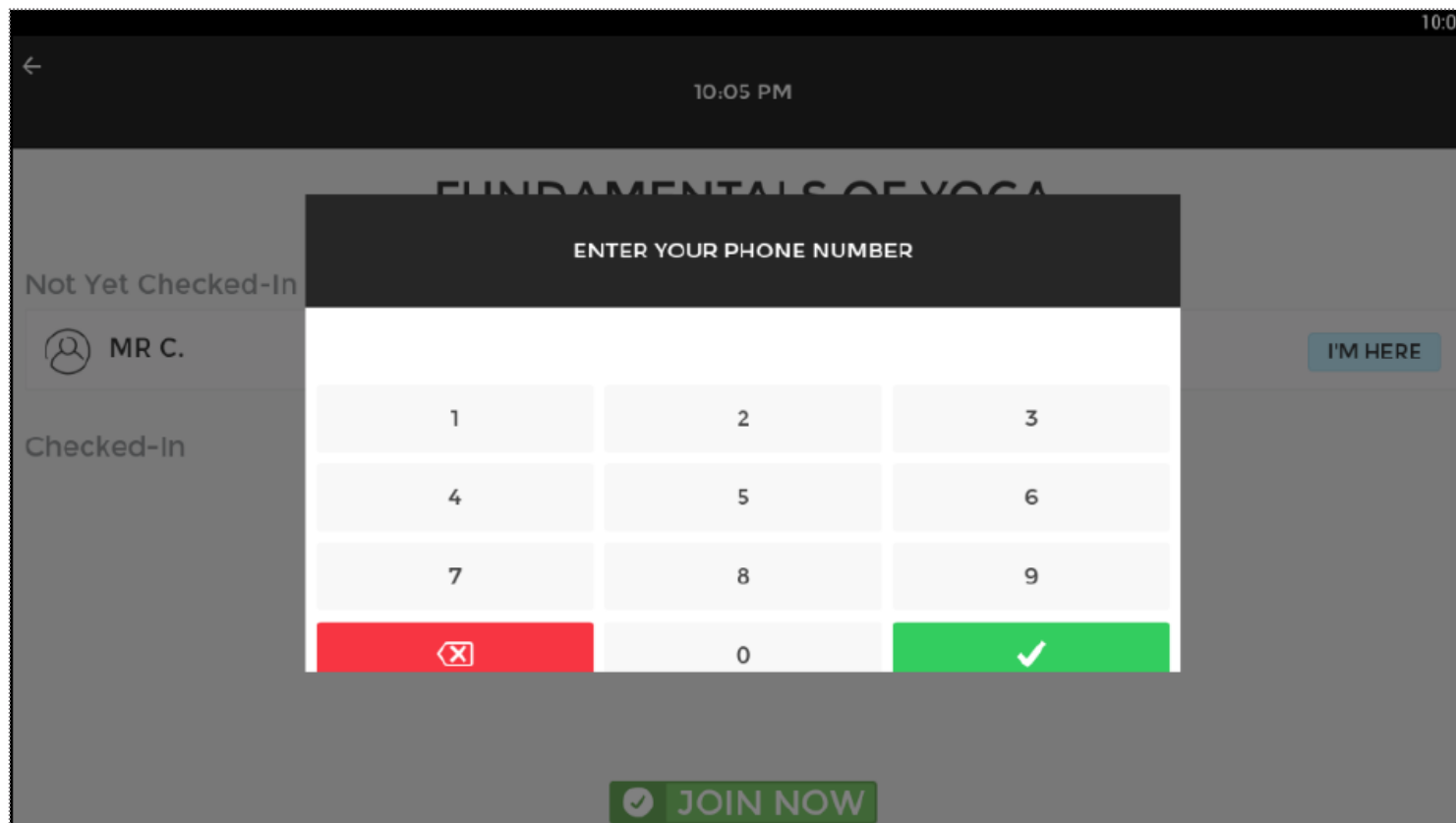
# ClubReady Class Kiosk App: Viewing Current Bookings

Choose to checkin an already registered member or have a new member join the class.

The screenshot shows the ClubReady Class Kiosk App interface. At the top, there is a dark header bar with a back arrow on the left and the time '10:05 PM' in the center. Below the header, the class title 'FUNDAMENTALS OF YOGA' is displayed in bold, followed by the time '10:30 PM - 11:30 PM with TRAINER EXTRAORDINAIRE'. The interface is divided into two main sections: 'Not Yet Checked-In' and 'Checked-In'. In the 'Not Yet Checked-In' section, there is a list of members. The first member is 'MR C.' with a person icon to the left. To the right of 'MR C.' is a blue button labeled 'I'M HERE', which is highlighted with a red rectangular box. Below the 'Not Yet Checked-In' section is the 'Checked-In' section, which is currently empty. At the bottom of the screen, there is a green button labeled 'JOIN NOW' with a checkmark icon to the left, also highlighted with a red rectangular box.

# ClubReady Class Kiosk App: Confirm Check In

You can have your registered member enter their phone number to check in to the class.

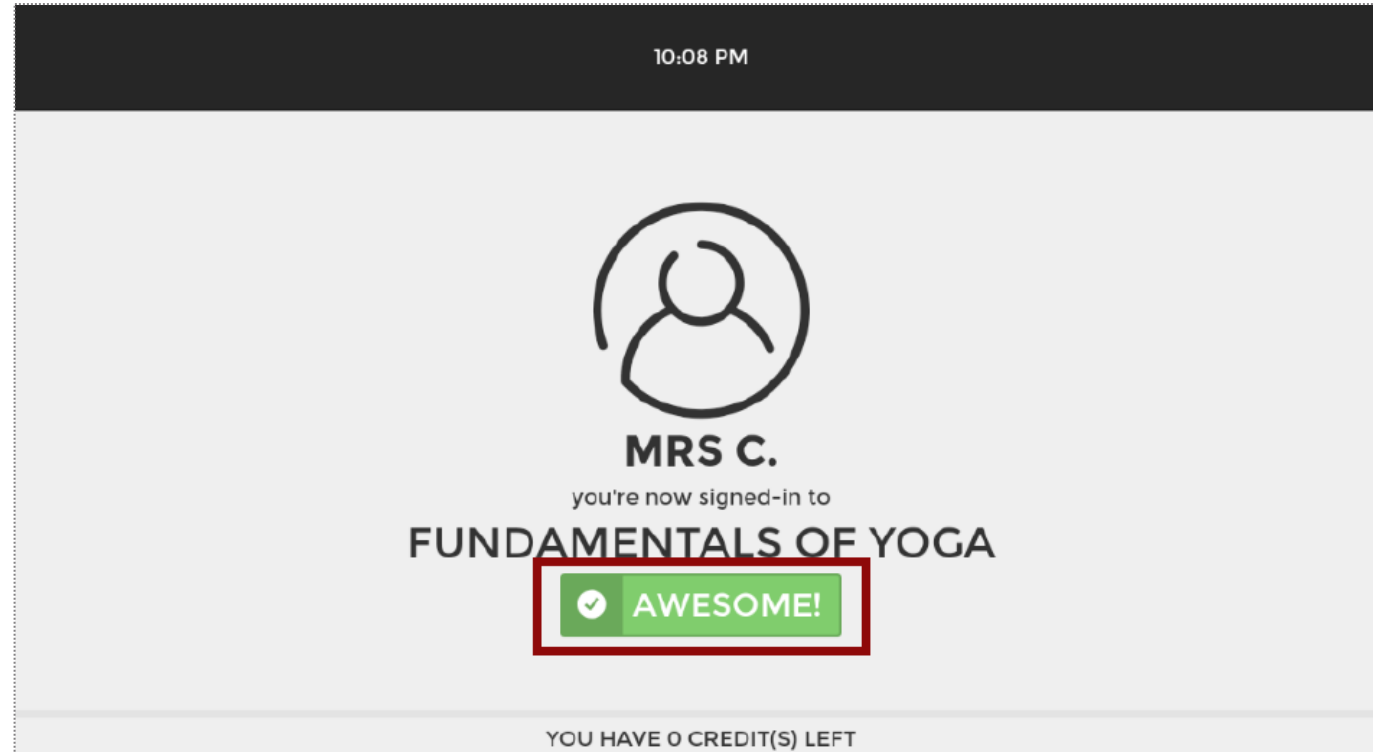


The screenshot displays the ClubReady Class Kiosk App interface. At the top, a black header bar shows a back arrow, the time '10:05 PM', and a status bar with '10:05'. The main background is grey and features the text 'FUNDAMENTALS OF YOGA' at the top. On the left, there are two sections: 'Not Yet Checked-In' with a user icon and 'MR C.', and 'Checked-In'. On the right, there is a blue button labeled 'I'M HERE'. In the center, a white modal box titled 'ENTER YOUR PHONE NUMBER' contains a numeric keypad with digits 1-9, 0, a red backspace button with an 'X', and a green confirmation button with a checkmark. At the bottom of the app, there is a green button with a checkmark and the text 'JOIN NOW'.



# ClubReady Class Kiosk App: Making A New Class Booking

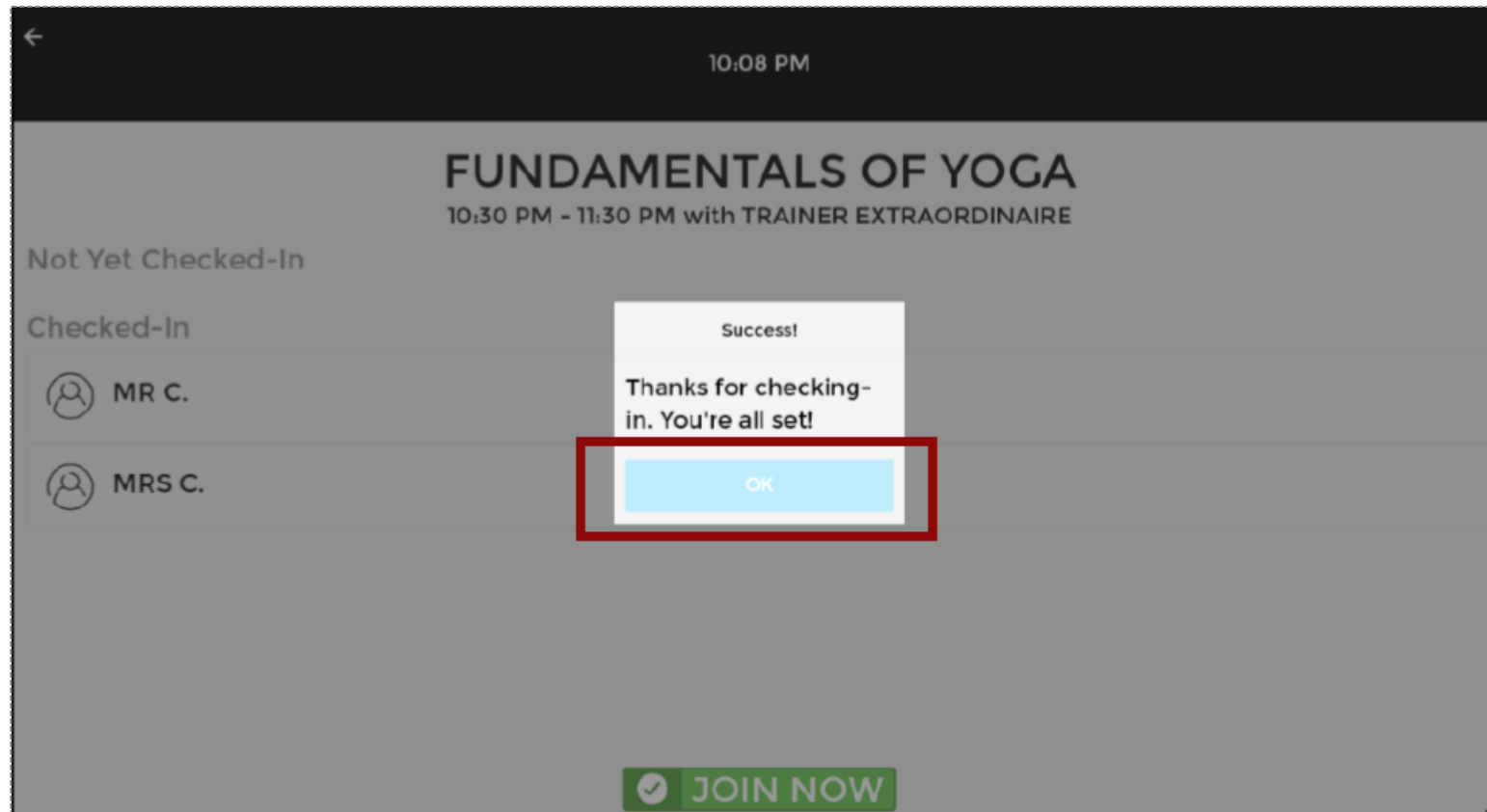
After a new member is booked, select AWESOME! to go back to the class list.





# ClubReady Class Kiosk App: Successful Check In

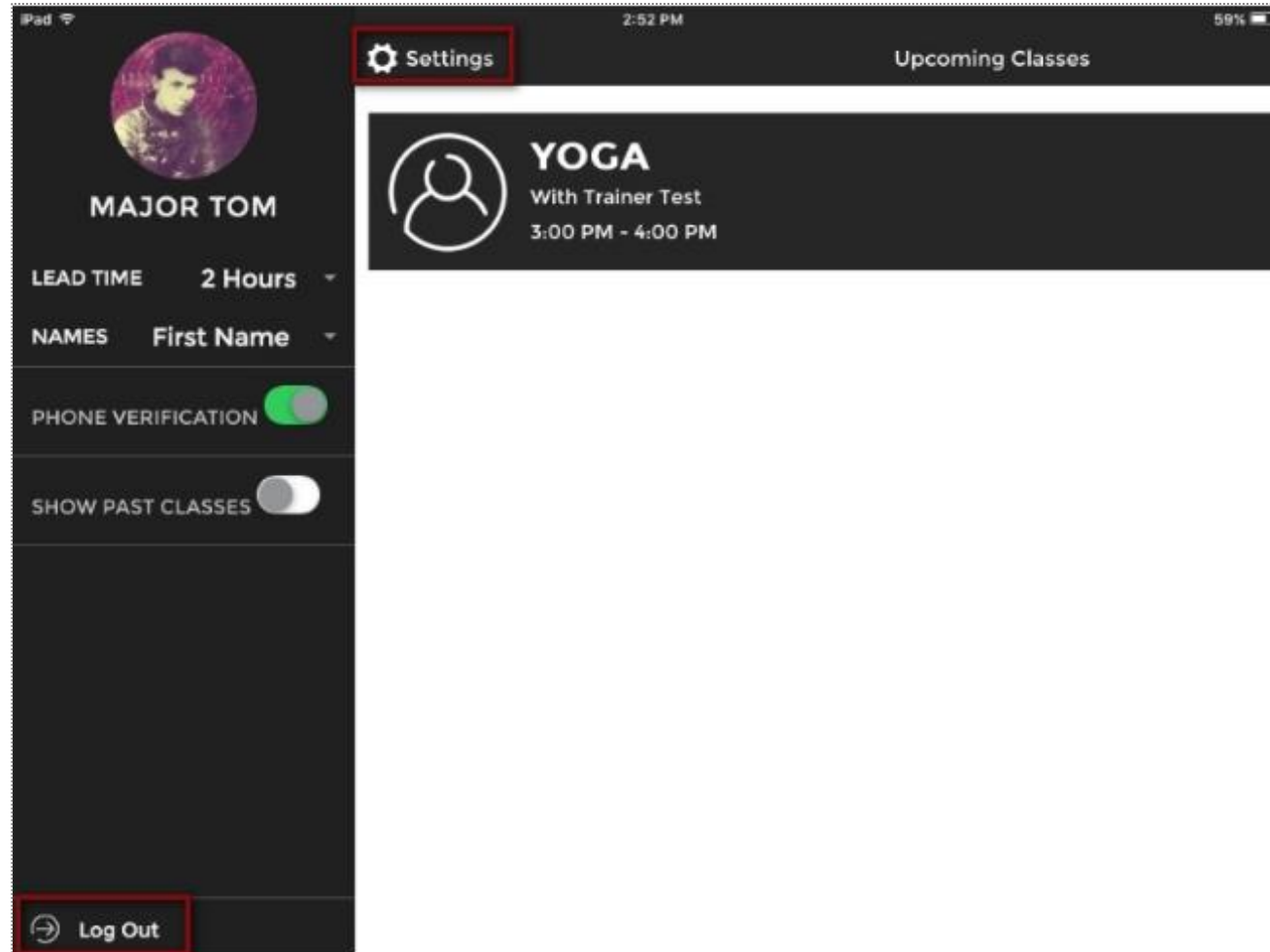
Confirmation will be seen for the member.





# ClubReady Class Kiosk App: Editing Your Settings

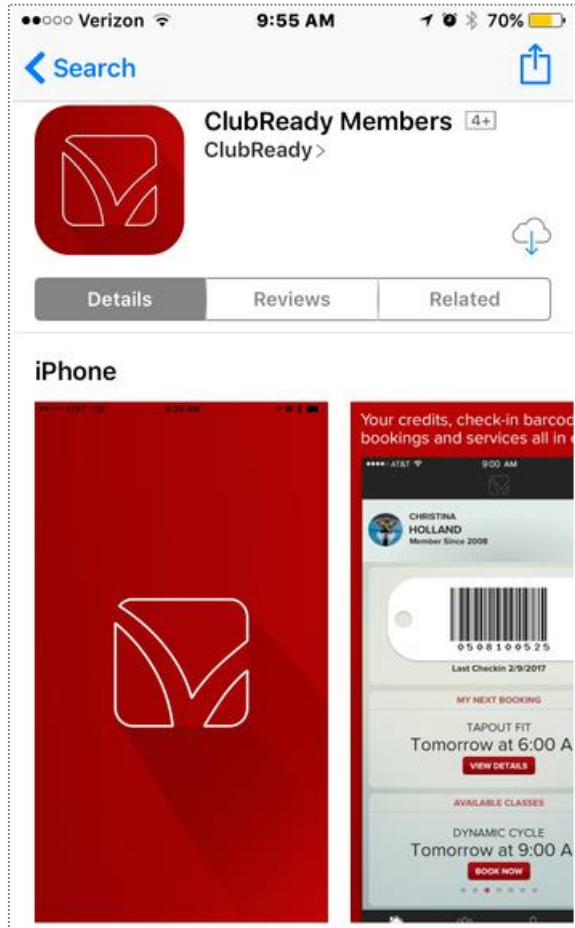
Adjust your personal settings from the app, including Lead Time, Members Name Display and Log Out.





# ClubReady Member App: Download

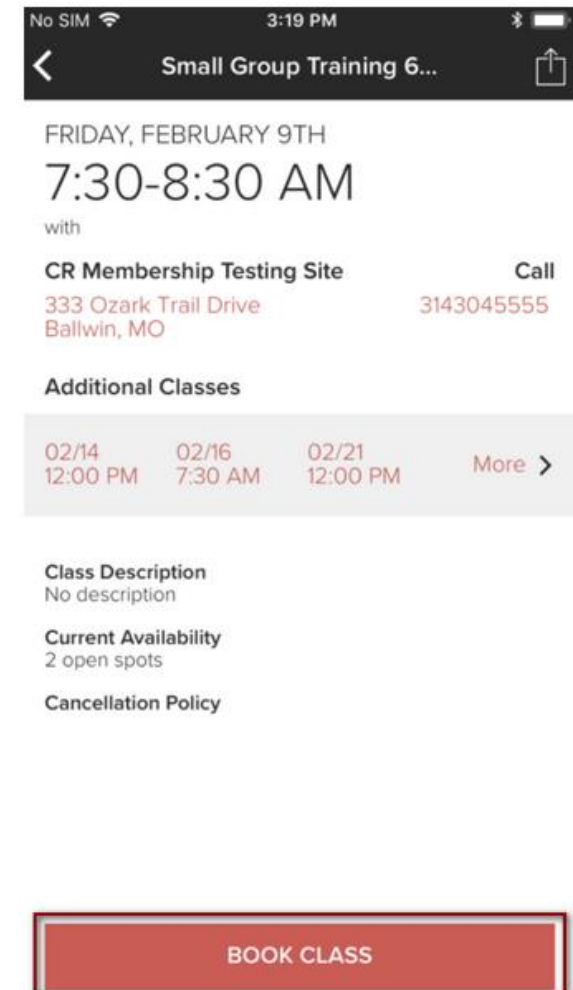
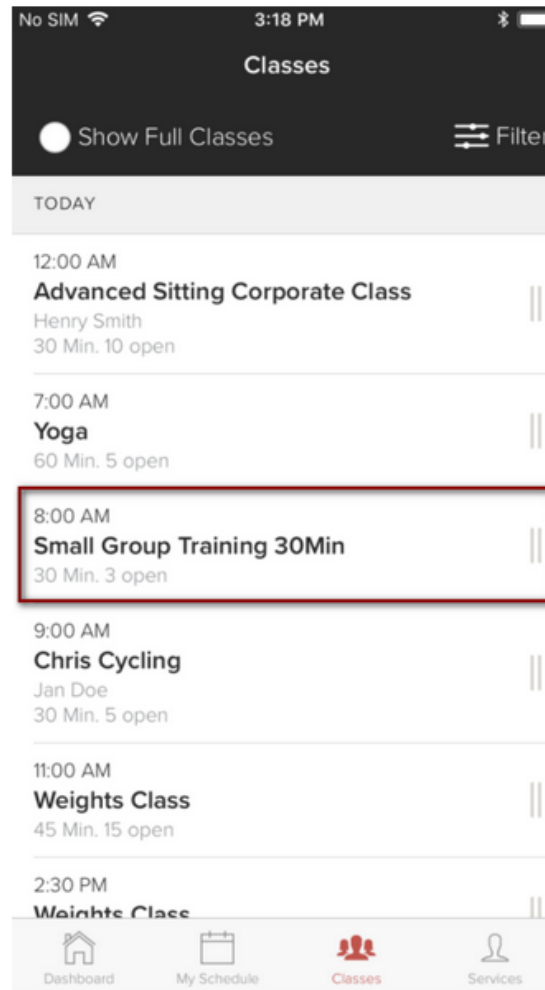
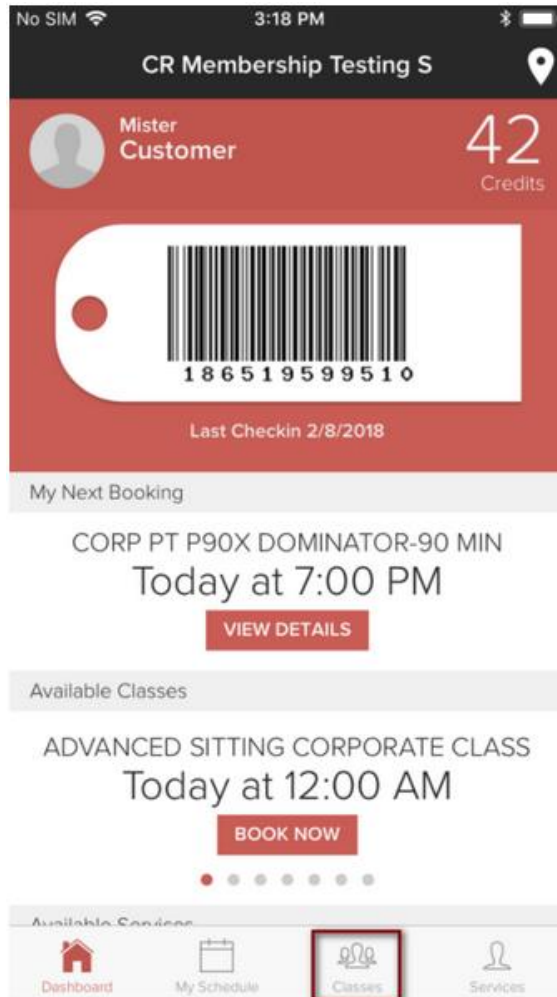
Members can login to the App using ClubReady username and password.



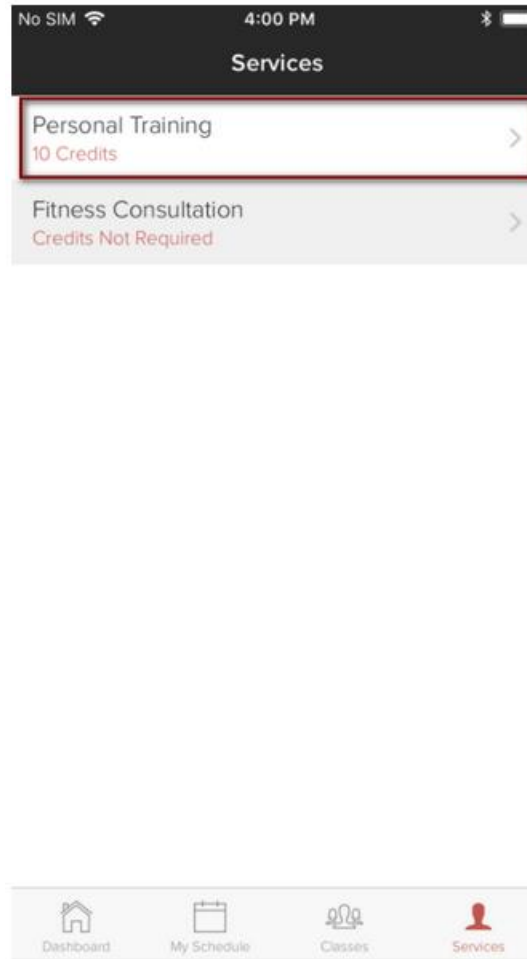
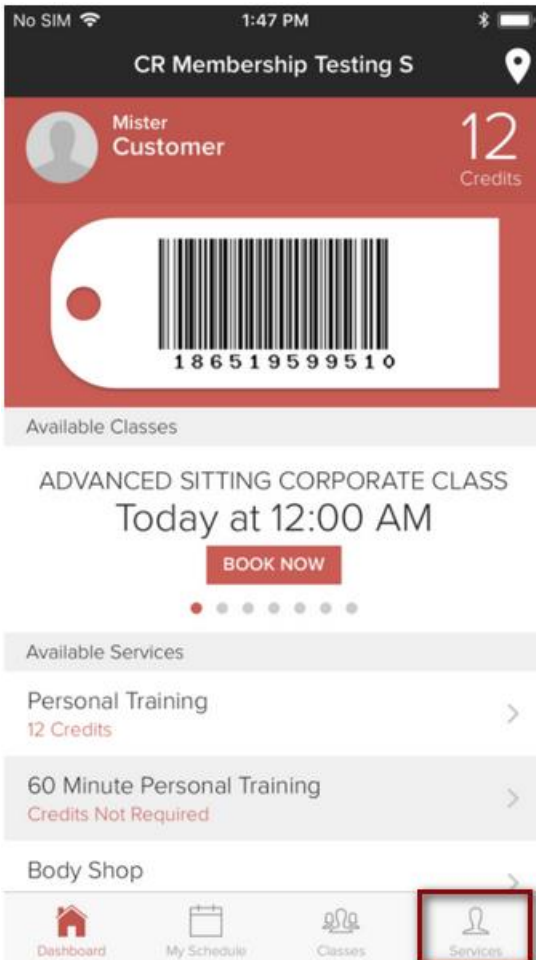
The ClubReady Member app is available for iPhone and Android. With your smart phone, download the ClubReady Team app from the Google Play store (if using your Android) or iTunes App Store (if using the iPhone).

# ClubReady Member App: Book Into Class

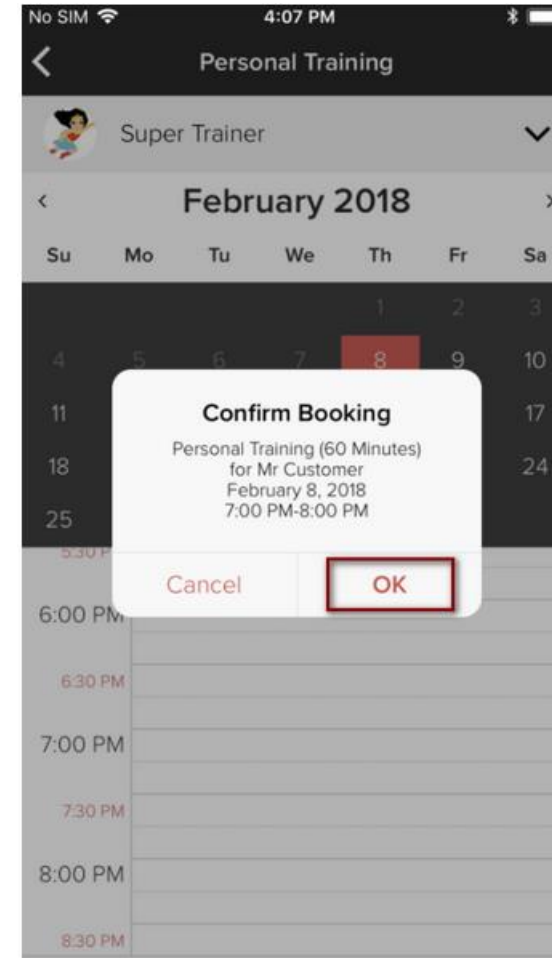
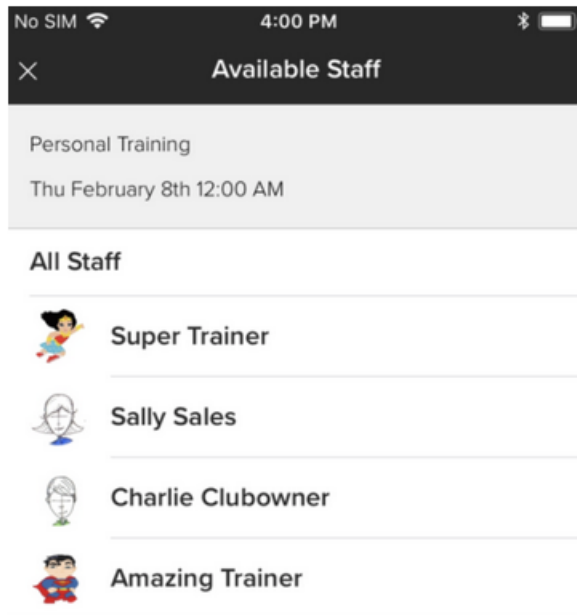
App for members to access Class Schedule and book.



# ClubReady Member App: Book A Service

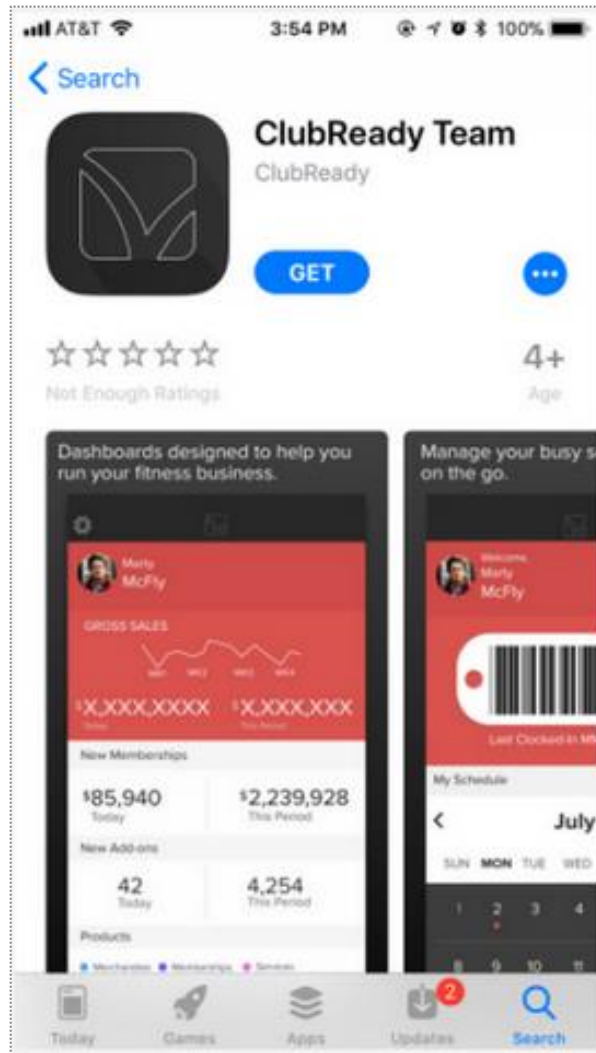


# ClubReady Member App: Book A Service



# ClubReady Team App: Download

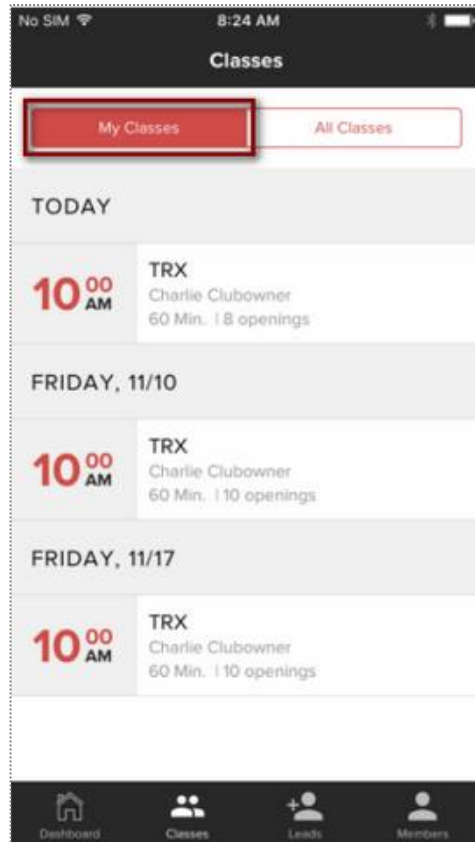
Y6 staff can login to the App using ClubReady username and password.



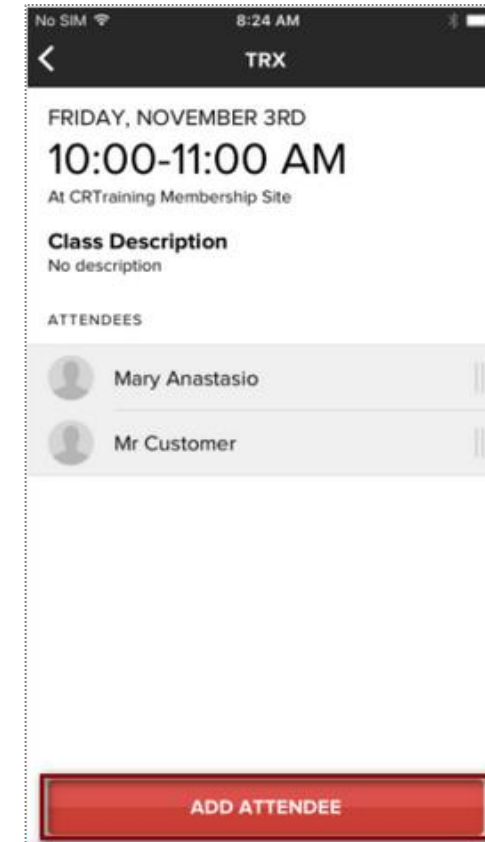
The ClubReady Team app is available for iPhone and Android. With your smart phone, download the ClubReady Team app from the Google Play store (if using your Android) or iTunes App Store (if using the iPhone).

# ClubReady Team App: Book Member Into Class

App for Y6 staff to access Class Schedule and book members.



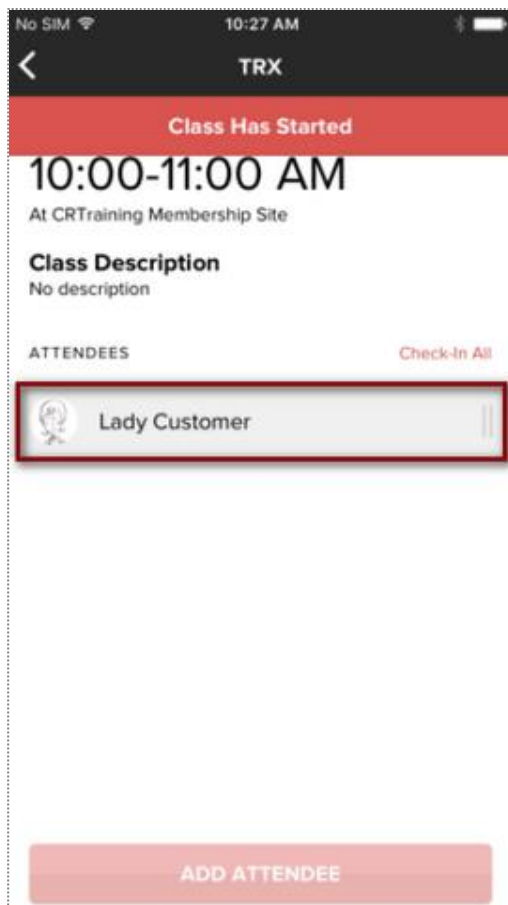
To schedule a member from the App, select the **Classes** icon in the Navigation Bar. Click on the specific class you wish to add a booking.



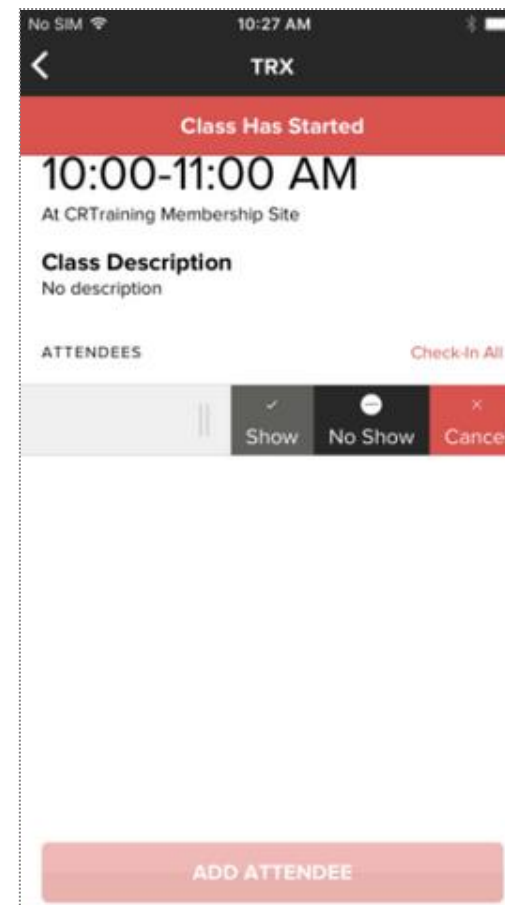
Click on **ADD ATTENDEE** to search for the member you wish to add to your class. Using the search tool, type the members name and select the account. Click on **OK** to confirm their booking.

# ClubReady Team App: Book Member Into Class

App for Y6 staff to access Class Schedule and book members.



On your dashboard, select the **Classes** option in the navigation bar. Select the name of the class your member is booked in.



To cancel this booking, slide the customer's name to the left. Select: **Show, No Show or Cancel**.




# Staff Management



# Your Login: Profile

## Updating your profile and availability

 Update My Profile

My Profile

My Availability

My Notify Settings

My Photo

Last Updated Wednesday, October 5, 2016 9:22 AM

First Name	<input type="text" value="Sally"/>
Last Name	<input type="text" value="Sales"/>
Gender	<input type="text" value="Female"/>
Address	<input type="text"/>
City	<input type="text"/>
State	<input type="text"/>
ZIP	<input type="text"/>
Email	<input type="text" value="sally@clubready.com"/>
Cell Phone	<input type="text"/>
Phone	<input type="text"/>

Login Information

User Name	<input type="text" value="Sally2431"/>	between 4 and 255 characters long
Password	<input type="password" value="••••"/>	between 4 and 10 characters long
Re Enter Password	<input type="password" value="••••"/>	

Click To Update Your Profile

Select the **My Profile** tab. Update your information. Entering your email is important for notifications from ClubReady. The log in section will allow you to change your username (if what you want is not already taken) and password. Click update to save your changes.

# Your Login: Availability

## Updating your profile and availability

**My Standard Weekly Availability**

My Profile **My Availability** My Notify Settings My Photo

In order to accept bookings your typical weekly work hours must be setup. This is used when customers book online to define what time periods are available for bookings. You only need to set this up once and then only change it if your work hours change.

Click in any time cell and move the mouse down to drag periods. Release the mouse button to create the period. You can duplicate days by using the copy tool. 'Clear All' will remove all the entered periods.

Copy Sun ☐ Sun ☐ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat  [Clear All](#)

Time	Sun	Mon	Tue	Wed	Thu	Fri	Sat
6:30 AM							
6:45 AM							
7:00 AM		7:00 AM		7:00 AM	7:00 AM	7:00 AM	7:00 AM
7:15 AM							
7:30 AM							
7:45 AM							
8:00 AM							
8:15 AM							
8:30 AM							
8:45 AM							
9:00 AM							
9:15 AM							
9:30 AM							
9:45 AM							
10:00 AM							
10:15 AM							
10:30 AM							
10:45 AM	10:45 AM	11:00 AM		11:00 AM			

Select **My Availability** tab. To select a time period as available click on the day and starting time that you are available. You will want to hold down the left mouse button as you drag to highlight the desired length time.

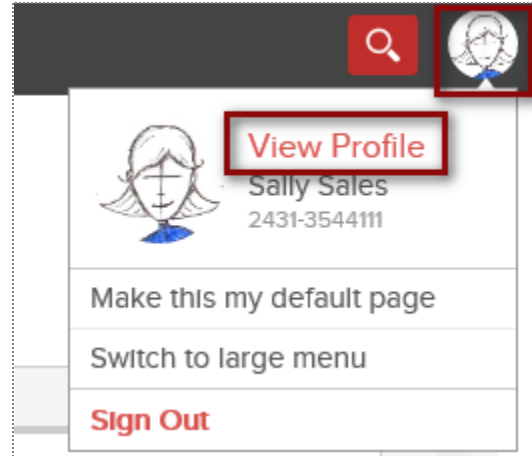
**Copy** - You can copy the available time from one day to another using this tool.

**Select Location** - if you have access to more than one location, you will be able to set your availability at each location using this drop-down.

**Clear All** - will remove all available times.

# Your Login

## Updating your profile and availability







Log into your site. In the top-right corner click on your picture icon. Select option **View Profile**.


# Setup Staff Clock In/Out Barcode


Staff > locate staff member > Go To Options > Time Clock Barcode


**Timmy CycleStar (23965138)**


Lead CycleStar  [view permissions](#)




 Setup for scheduling?  Yes: 0 future bookings 





 [timmy@cyclebar.com](mailto:timmy@cyclebar.com)

 no cell phone entered


 no home phone entered


 **Go To Options**  **Login As**  [Delete Timmy](#)


 **Employee Time Clock Barcode**


 **GO BACK**


**Timmy CycleStar**

 [Delete The Current Barcode - 4321](#)



Manually Enter Barcode  

 [Generate And Assign A Barcode](#)


 [Scan And Assign An Existing Barcode](#)


Employee must be assigned a barcode to keep track of their clocked hours. You can choose to **Manually Enter Barcode** for the staff. Any alpha numeric code that is more than 2 characters.


# Setup Staff Hourly Pay Rate


Staff > locate staff member > Go To Options > Time Clock Pay Rate


**Administrative**

 [Access Their Login Area](#)

 [Edit Profile](#)

 [Disciplinary History & Entry](#)

 [Time Clock Barcode](#)

 [Time Clock Pay Rate](#)

 **Employee Time Clock Pay Rate**

[GO BACK](#)

Frontdesk Felicity

Time Clock Pay Rate \$  /hr


[Update](#)

Employee must be assigned an hourly pay rate to know what will be their total pay when running the Time Clock Payroll Report. Type in **the Time Clock Pay Rate** and click **Update**.


# Check In Web Kiosk

Setup > General > Check In Web Kiosk

01:33:49 PM

 ClubReady

Client Check In



Please Scan Your Barcode

– OR –

Type Your Barcode And Press Enter

Once the employee has a barcode and an hourly pay rate assigned to them, they can start to clock in/out of ClubReady.

After logging in to activate the kiosk, the screen will update requesting staff to type their assigned barcode.

\*The Check In Web Kiosk will be used for staff to document their worked hours.

# Staff Time Clock

04:37:44 PM

**Mister Manager [20168170]**  
General Manager



IN



OUT

**CURRENTLY CLOCKED IN**

Once they are done typing the barcode, staff will need to manually select **IN** or **OUT** to document their hours.

# Time Clock Report

Reports > Staff > Time Clock Payroll

Time Clock Payroll ☆

7/1/2019

Jul 2019

Sun Mon Tue Wed Thu Fri Sat

1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

7/31/2019

Jul 2019

Sun Mon Tue Wed Thu Fri Sat

	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

Preset Date Ranges

Today	Yesterday	Prev 2 Days
This Week	Prev 7 Days	Prev 14 Days
This Month (Aug)	Aug 1 - 15	Aug 16 - 31
Prev Month	Jul 1 - 15	Jul 16 - 31
Jun '19	May '19	Apr '19
2019	2018	2017

Exclude Employees with No Hours ☐

Include Deleted Staff ☐

**RUN REPORT**

After you have setup Employee Check In, you can run the Time Clock Payroll Report. Select the date range from the calendars or select from the preset date ranges. Click **Generate Report**.

The online report will display **Employee Name**, their **Home Location**, total **Clocked Hours**, total **Clocked Mins**, **Total Minutes**, **Pay Rate** and **Total Pay**. Click the hyperlink for **Total Minutes** to view additional information for that staff member.

 Time Clock Payroll Summary - CRTraining Membership Site (2829)  
7/1/2019 - 7/31/2019

User ID	Employee Name	Home Location	Clocked Hours	Clocked Mins	Total Minutes	Pay Rate	Total Pay
4670167	Charlie Clubowner	CRTraining Membership Site	29	32	<a href="#">1,772</a>	\$12.75	\$376.55
4711678	Frontdesk Felicity	CRTraining Membership Site	10	35	<a href="#">635</a>	\$18.00	\$190.50
9618414	John Cena	CRTraining Membership Site	9	42	<a href="#">582</a>	\$25.00	\$242.50
18351031	Mike Trout	CRTraining Membership Site	14	30	<a href="#">870</a>	\$17.00	\$246.50
			62	139	3,859	\$72.75	\$1,056.05

To export the data, select the floppy disk and choose your method of export: **CSV** (comma delimited), **PDF**, or **Excel**.





# ClubReady Billing



# ClubReady Billing: Fees

Breakdown of potential fees. Please refer to your ClubReady contract for full details.



## ClubReady Fees

- Software Fee
- Tech Fee
- PCI Fee
- ACH Service Fee
- Remit Statement Fee



## Billing Fees

- Account Updater
- CC Chargeback
- ACH Return
- Draft Transactions



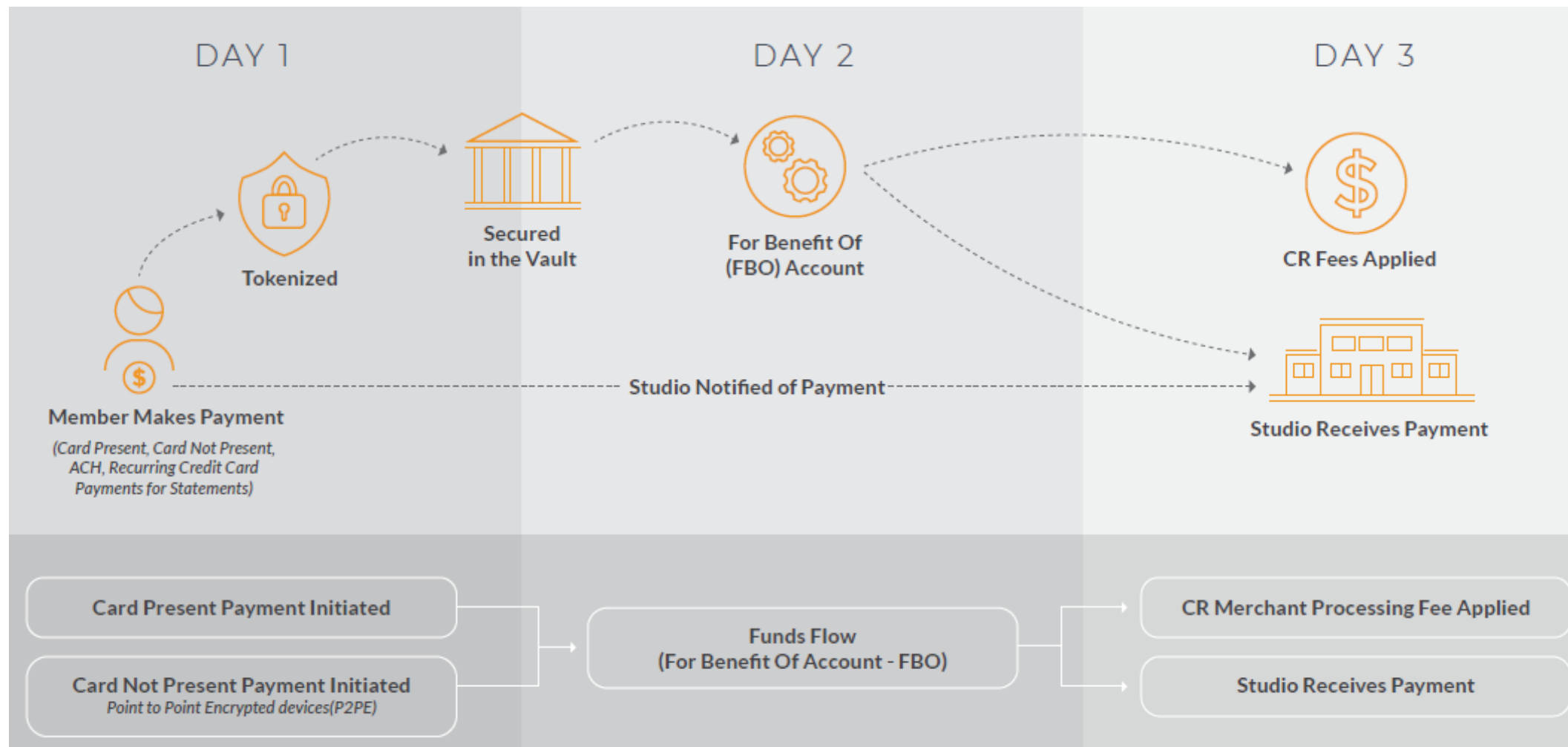
## Misc. Fees

- Text Messages
- leadSPEAK
- Franchise Fees



# ClubReady Payments: How do funds flow?

ClubReady offers a single-source payments solution. Now you have one trusted partner to facilitate your payments quickly, reconcile payments simply, gain better reporting on payments, all while reducing the number of vendors you have to depend upon.



# ClubReady Billing: Chargebacks

Click the video below to understand our Chargeback process and how it works.





# Integrations

# ClubReady vs. Integrations



## ClubReady

- Agreements
- Payments
- Task Management
- Member Management



## PIQ

- Workouts
- Usage
- Scoring
- Community



## APP

- Schedule one-on-one services
- Book into a class
- View workout history
- Community / connect with friends



## Your "Admin Portal" to Streamline Operations.

Implement safe class practices, expand business opportunities, and scale operations.

Streamline entry with contactless check-ins and free staff for the face time that builds engagement.

Enable members to book their own sessions, add to calendars, cancel, contactless check-in, and launch a virtual session with a click.

Task Management  
Member Management  
Staff Management  
Class Management  
Services Management  
Revenue Reporting System

Zoom Module  
POS and Inventory  
Management  
Managed Billing System  
iKizmet Real-time Analytics



### OVERVIEW



### HOW DO I USE IT?



### HOW DO MY CLIENTS USE IT?



### FEATURES



## Your "Client Portal" to Engage Members.

Offer performance displays in any group fitness environment.

Manage members and space: create room layouts, spot book, and create challenges. Search member stats, run reports on specific metrics, and lead members to their goals.

Enable members to personalize their profiles, book classes, buy sales packages, and view workout stats and challenges.

Schedule one-on-one services  
Book into a class / spot booking  
Launch virtual classes  
Purchase sales packages  
Membership barcode  
Update profile / billing info

Web Plugins  
Track Class Stats  
Member/Client Web Portal  
Create Challenges  
Class Check In Kiosk



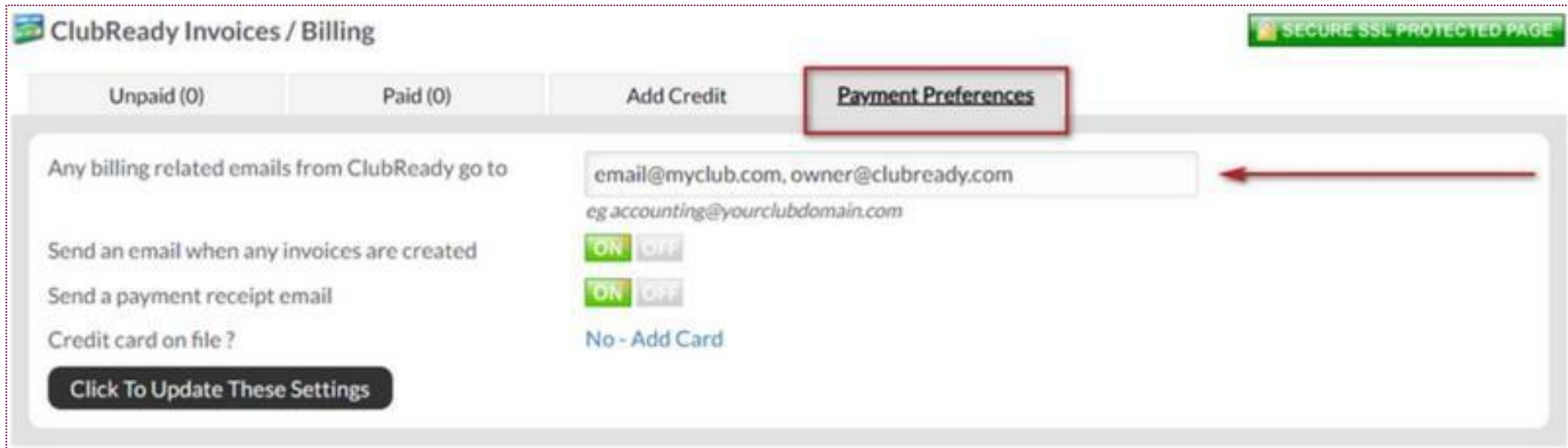
# Remit Report

Understanding your Remit



# Receiving Remit By Email

Setup > ClubReady Invoices > Payment Preferences



ClubReady Invoices / Billing

SECURE SSL PROTECTED PAGE

Unpaid (0) Paid (0) Add Credit **Payment Preferences**

Any billing related emails from ClubReady go to

email@myclub.com, owner@clubready.com  
eg accounting@yourclubdomain.com

Send an email when any invoices are created ☒ ON ☐ OFF

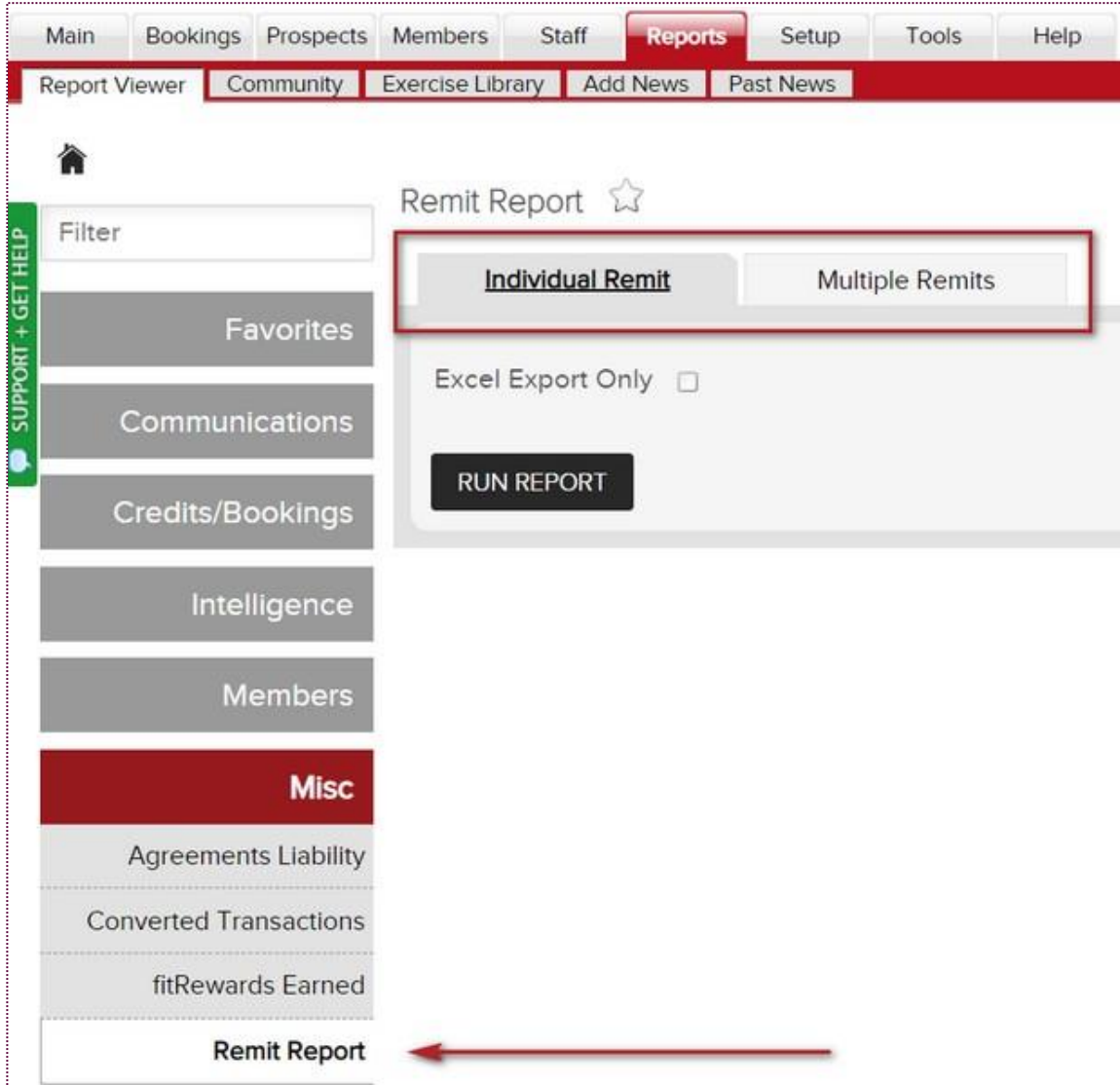
Send a payment receipt email ☒ ON ☐ OFF

Credit card on file ? No - Add Card

Click To Update These Settings

Set to receive an email notification when a remit report is ready by entering the email address and **Click To Update These Settings**.

# Viewing Remits in ClubReady



The screenshot displays the ClubReady web application interface. At the top, a navigation bar includes tabs for Main, Bookings, Prospects, Members, Staff, **Reports**, Setup, Tools, and Help. Below this, a secondary bar shows Report Viewer, Community, Exercise Library, Add News, and Past News. On the left, a vertical sidebar contains a home icon, a 'Filter' input field, and a list of menu items: Favorites, Communications, Credits/Bookings, Intelligence, Members, **Misc** (highlighted in red), Agreements Liability, Converted Transactions, fitRewards Earned, and Remit Report (indicated by a red arrow). The main content area is titled 'Remit Report' with a star icon. It features two tabs: Individual Remit and Multiple Remits. Below the tabs is an 'Excel Export Only' checkbox and a 'RUN REPORT' button.

Remit Reports are saved and available in ClubReady. Navigate to **Reports > Misc Reports > Remit Report**.

# Viewing Remits in ClubReady

Remit Report ☆

**Individual Remit** Multiple Remits

Select Remit  ▼

Excel Export Only ☐

**RUN REPORT**

Document Map

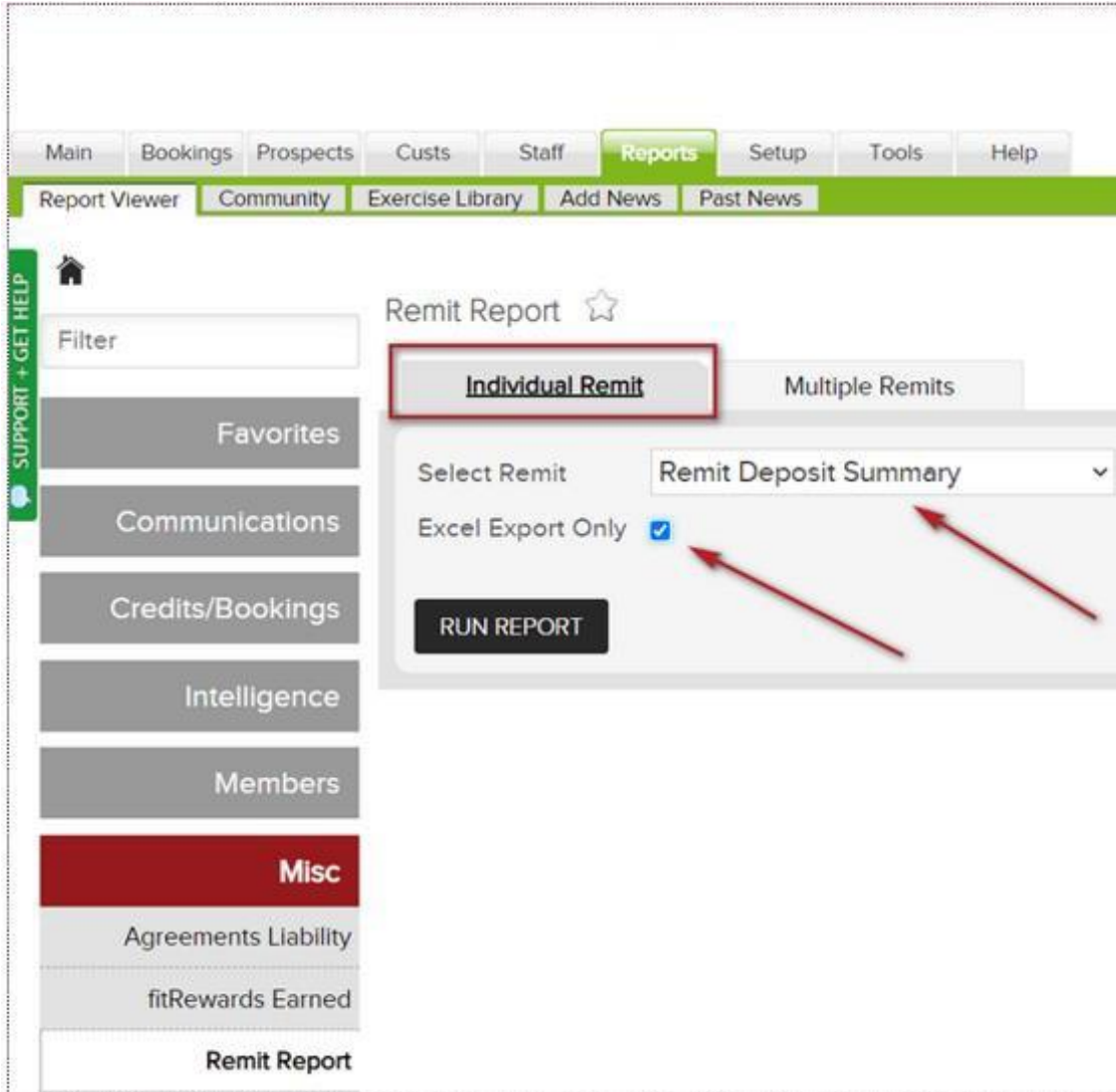
- Remit Report - 5507
  - Summary
  - Transaction Fees
  - Down
  - Products
  - Draft
  - PDC
  - Refunds
  - Returns
  - Fees
  - Adjustments

**Settlement Summary**  
10/18/2021 - 10/20/2021 (#34463)

	Upfront
Cash	\$0.00
External Terminal	\$0.00
Written Check	\$0.00
Credit Card	\$668.00
e-Check	\$0.00
<b>Total</b>	<b>\$668.00</b>
Sales Tax*	
Total Less Sales Tax*	
Total Revenue Subject to Franchise Fee	
Totals Through ClubReady	\$668.00
ClubReady Transaction Fees	(\$19.71)

Use the **Document Map** on the left to view additional details.

# Viewing Remits in ClubReady: Helpful Tip



The screenshot shows the ClubReady web interface. At the top, there is a navigation bar with tabs: Main, Bookings, Prospects, Custs, Staff, Reports (highlighted in green), Setup, Tools, and Help. Below this is a sub-navigation bar with tabs: Report Viewer, Community, Exercise Library, Add News, and Past News. On the left side, there is a vertical sidebar with a 'SUPPORT + GET HELP' button and a list of menu items: Filter, Favorites, Communications, Credits/Bookings, Intelligence, Members, Misc (highlighted in red), Agreements Liability, fitRewards Earned, and Remit Report. The main content area is titled 'Remit Report' with a star icon. It features two tabs: 'Individual Remit' (highlighted with a red box) and 'Multiple Remits'. Below the tabs, there is a 'Select Remit' dropdown menu set to 'Remit Deposit Summary'. To the left of the dropdown is a checkbox labeled 'Excel Export Only' which is checked. Below these elements is a black button labeled 'RUN REPORT'. Two red arrows point to the 'Excel Export Only' checkbox and the 'Remit Deposit Summary' dropdown menu.

To view all your remit deposits at once, and to reconcile your deposits to your bank statement, this is a handy tool to use:

- On **Individual Remit** tab, leave the “Select Remit” drop down box populated to “Remit Deposit Summary” (do not input a date).
- Check the “**Excel Export Only**” box > click “Run Report”

An excel report will be generated and show all your deposits or negative balances.

# Viewing Remits in ClubReady: Excel Export

1	Remit ID	From	To	Deposit Amount	Accrual Balance
2	34813	11/11/2021	11/14/2021	\$2,940.69	0.00
3	34760	11/8/2021	11/10/2021	\$6,586.90	0.00
4	34715	11/4/2021	11/7/2021	\$5,180.14	0.00
5	34662	11/1/2021	11/3/2021	\$5,642.54	0.00
6	34603	10/28/2021	10/31/2021	\$5,873.30	0.00
7	34550	10/25/2021	10/27/2021	\$3,569.10	0.00
8	34493	10/21/2021	10/24/2021	\$3,473.29	0.00
9	34463	10/18/2021	10/20/2021	\$6,065.35	0.00
10	34392	10/14/2021	10/17/2021	\$4,138.56	0.00
11	34363	10/11/2021	10/13/2021	\$2,576.44	0.00
12	34306	10/7/2021	10/10/2021	\$2,877.17	0.00
13	34251	10/4/2021	10/6/2021	\$4,720.56	0.00
14	34209	10/1/2021	10/3/2021	\$3,137.12	0.00
15	34178	9/30/2021	9/30/2021	\$1,369.37	0.00
16	34151	9/27/2021	9/29/2021	\$5,827.49	0.00
17	34081	9/23/2021	9/26/2021	\$3,332.10	0.00
18	34051	9/20/2021	9/22/2021	\$2,660.63	0.00
19	33993	9/16/2021	9/19/2021	\$2,651.60	0.00
20	33952	9/13/2021	9/15/2021	\$4,500.33	0.00
21	33883	9/9/2021	9/12/2021	\$5,019.00	0.00
22	33841	9/6/2021	9/8/2021	\$3,828.75	0.00
23	33796	9/2/2021	9/5/2021	\$961.74	0.00
24	33744	9/1/2021	9/1/2021	\$328.44	0.00
25	33726	8/30/2021	8/31/2021	\$3,129.30	0.00
26	33682	8/26/2021	8/29/2021	\$2,579.46	0.00



# Remit Report: Summary

**Upfront (Downpayments)** - Payments made on invoices due and paid the day of the purchase.

**Products** - Products that have been created in your site and sold at POS.


**Draft** - Payments made on a future invoice.

**PDC** - Past due invoices

**Refunds & Returns:** Refunds are invoices paid and returned to the customer's CC/ACH. Returns are invoices paid and returned by the customer's bank or CC (chargeback due to customer dispute)

## Settlement Summary

10/18/2021 - 10/20/2021 (#34463)



	Upfront	Products	Draft	PDC	Refunds	Returns	Totals
Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
External Terminal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Written Check	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Credit Card	\$668.00	\$0.00	\$1,074.00	\$0.00	\$0.00	\$0.00	\$1,742.00
e-Check	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$668.00	\$0.00	\$1,074.00	\$0.00	\$0.00	\$0.00	\$1,742.00

# Remit Report: Rows

---

**Payment Method** - Cash, External Terminal, Written Check are listed but should be deposited by the club to their bank. Credit Card, and Echeck are deposited by ClubReady minus the fees and adjustments.

**Sales Tax** - Total sales tax paid that is due to your state.

**Total Revenue Subject to Franchise Fee** - Additional fees to Corporate.

**Totals Through ClubReady** - This is your total for the Credit Card and Echeck.

**ClubReady Transaction Fees** - Fees assessed for Credit Card and Echeck transactions.

**Other Fees** - Any additional fees charged such as a Software or Collections fee. These will be explained under the Fees tab of the spreadsheet.

**Total Deductions** - Combines the Transaction Fees and Other Fees

**Total Before Adjustments** - This is the totals through ClubReady (CC/ACH) minus Fees.

**Total Adjustments** - Could be adjustments due to a Hardware purchase or Swipe vs. Manual Credit Card purchase which may give a positive adjustment. These will be explained under the Adjustments tab of the spreadsheet.

**Net ACH Transfer** - The final deposit amount.

**Club Accrual Balance** - If there is a negative accrual which will be deducted from the next remit. You will see the deduction as an adjustment.

# Remit Report: Rows

## Settlement Summary

10/18/2021 - 10/20/2021 (#34463)

	Upfront	Products	Draft	PDC	Refunds	Returns	Totals
Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
External Terminal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Written Check	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Credit Card	\$668.00	\$0.00	\$1,074.00	\$0.00	\$0.00	\$0.00	\$1,742.00
e-Check	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
<b>Total</b>	<b>\$668.00</b>	<b>\$0.00</b>	<b>\$1,074.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$1,742.00</b>
Sales Tax*							\$0.00
Total Less Sales Tax*							\$1,742.00
<b>Total Revenue Subject to Franchise Fee</b>							\$1,742.00
Totals Through ClubReady	\$668.00	\$0.00	\$1,074.00	\$0.00	\$0.00	\$0.00	\$1,742.00
ClubReady Transaction Fees	(\$19.71)	\$0.00	(\$33.57)	\$0.00			(\$53.28)
Other Fees (See Tab)				\$0.00			(\$203.26)
Total Deductions							(\$256.54)
Total Before Adjustments							\$1,485.46
Total Adjustments							\$0.00
Net ACH Transfer to Club							\$1,485.46
Club Accrual Account Balance	\$0.00						

\*Sales tax is not deducted from your remit and is sent with your total deposit.

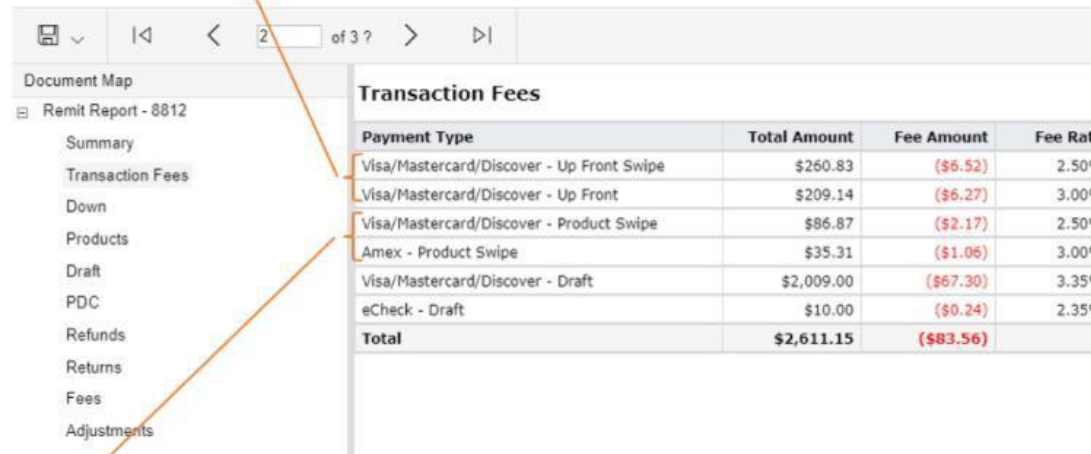


# Remit Report: Transaction Fees

Transaction Fees tab will list any fees assessed for **Credit Card** and **e-Check** transactions.

Card-present fees are now separated from card-not-present fees as they have different rates.

Note: This eliminates the need for card-present credits on the Adjustments tab.



Payment Type	Total Amount	Fee Amount	Fee Rate
Visa/Mastercard/Discover - Up Front Swipe	\$260.83	(\$6.52)	2.50%
Visa/Mastercard/Discover - Up Front	\$209.14	(\$6.27)	3.00%
Visa/Mastercard/Discover - Product Swipe	\$86.87	(\$2.17)	2.50%
Amex - Product Swipe	\$35.31	(\$1.06)	3.00%
Visa/Mastercard/Discover - Draft	\$2,009.00	(\$67.30)	3.35%
eCheck - Draft	\$10.00	(\$0.24)	2.35%
<b>Total</b>	<b>\$2,611.15</b>	<b>(\$83.56)</b>	

Similarly, VMD fees are now separated from Amex fees as they have different rates.

# Remit Report: Down, Products & Draft

**Downpayments** and **Products** tab will list each transaction individually with customer name, date, amount before tax, sales tax, payment method, and the detail of the invoice.

## Down Payments

Client Name	Email	Date	Detail	Payment	Amount	Sales Tax
		10/18/2021	4 sessions per month	MasterCard (through CR)	\$189.00	\$0.00
		10/19/2021	4 sessions per month - renewal month to month 99	MasterCard (through CR)	\$180.00	\$0.00
		10/20/2021	8 sessions per month	Visa (through CR)	\$299.00	\$0.00
Total					\$668.00	\$0.00

\*Transactions on this tab include any transactions paid using Credit on Account.  
Revenue amounts on the Summary tab, however, do not include Credit on Account transactions.

**Draft** tab lists the customer name and each individual draft invoice that was successful, the amount before tax, sales tax, payment method, detail of the draft invoice. Also provided is the agreement date and it's auto-renew status.

## Draft

Client Name	Email	Date	Detail	Payment	Associated Agreement Date	Auto-Renew?	Amount	Sales Tax
		10/18/2021	4 sessions per month	Amex (through CR)	8/18/2021	NO	\$189.00	\$0.00
		10/18/2021	4 sessions per month	Amex (through CR)	5/18/2021	NO	\$189.00	\$0.00
		10/19/2021	79 maintenance	Visa (through CR)	1/19/2018	YES	\$79.00	\$0.00
		10/19/2021	4 sessions per month	Visa (through CR)	4/28/2021	NO	\$140.00	\$0.00
		10/20/2021	4 sessions per month	Discover (through CR)	7/20/2021	NO	\$189.00	\$0.00
		10/20/2021	4 sessions per month	Visa (through CR)	7/20/2021	NO	\$189.00	\$0.00
		10/20/2021	99 maintenance	Visa (through CR)	2/20/2020	YES	\$99.00	\$0.00
Total							\$1,074.00	\$0.00

\*Transactions on this tab include any transactions paid using Credit on Account.  
Revenue amounts on the Summary tab, however, do not include Credit on Account transactions.

# Remit Report: PDC

PDC fees and their associated transaction fees are calculated in your report.

## Settlement Summary 10/18/2021 - 10/20/2021

	Upfront	Products	Draft	PDC	Refunds	Returns	Totals
Cash	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
External Terminal	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Written Check	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Credit Card	\$668.00	\$0.00	\$1,074.00	\$0.00	\$0.00	\$0.00	\$1,742.00
e-Check	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
Total	\$668.00	\$0.00	\$1,074.00	\$0.00	\$0.00	\$0.00	\$1,742.00
Sales Tax*							\$0.00
Total Less Sales Tax*							\$1,742.00
Total Revenue Subject to Franchise Fee							\$1,742.00
Totals Through ClubReady	\$668.00	\$0.00	\$1,074.00	\$0.00	\$0.00	\$0.00	\$1,742.00
ClubReady Transaction Fees	(\$19.71)	\$0.00	(\$33.57)	\$0.00			(\$53.28)
Other Fees (See Tab)				\$0.00			(\$203.26)
Total Deductions							(\$256.54)
Total Before Adjustments							\$1,485.46
Total Adjustments							\$0.00
Net ACH Transfer to Club							\$1,485.46
Club Accrual Account Balance	\$0.00						

\*Sales tax is not deducted from your remit and is sent with your total deposit.

# Remit Report: Refunds & Returns

**Refund** and **Returns** tab provides the customer name, the date of the refund and the total amount refunded, the detail of the invoice that was refunded.

## Refunds

Client Name	Email	Date	Detail	Amount	Tax Amount
		3/23/2021	Approved	(\$280.00)	\$0.00
		5/11/2021	Approved	(\$99.00)	\$0.00
		6/7/2021	Approved	(\$320.00)	\$0.00
Total				(\$699.00)	\$0.00

## Returns

Client Name	Email	Date	Detail	Amount
		4/14/2020	Chargeback by Customer on 04/14/2020 - Merchandise Not Received	(\$200.00)
		4/13/2020	Chargeback by Customer on 04/13/2020 - Charge Submitted After You Were Advised to Discontinue Future Billing	(\$20.00)
Total				(\$220.00)

# Remit Report: Fees

**Fees** tab will list any fees assessed by the Franchise or Collections. The fees are broken out by detail, amount, and who the fee is paid to.

Fees			
Detail	Additional Detail	Amount	Tax Amount
Franchise Fee	Chain	(\$104.52)	\$0.00
Remit Statement Fee	ClubReady	(\$4.95)	\$0.00
PCI Compliance Fee	ClubReady	(\$19.95)	\$0.00
Custom Branded Mobile App	ClubReady	(\$39.00)	\$0.00
Media Fund	Chain	(\$34.84)	\$0.00
Total		(\$203.26)	\$0.00

# Remit Report: Adjustments

**Adjustments** tab provides the detail of the adjustment as well as the amount.

## Adjustments

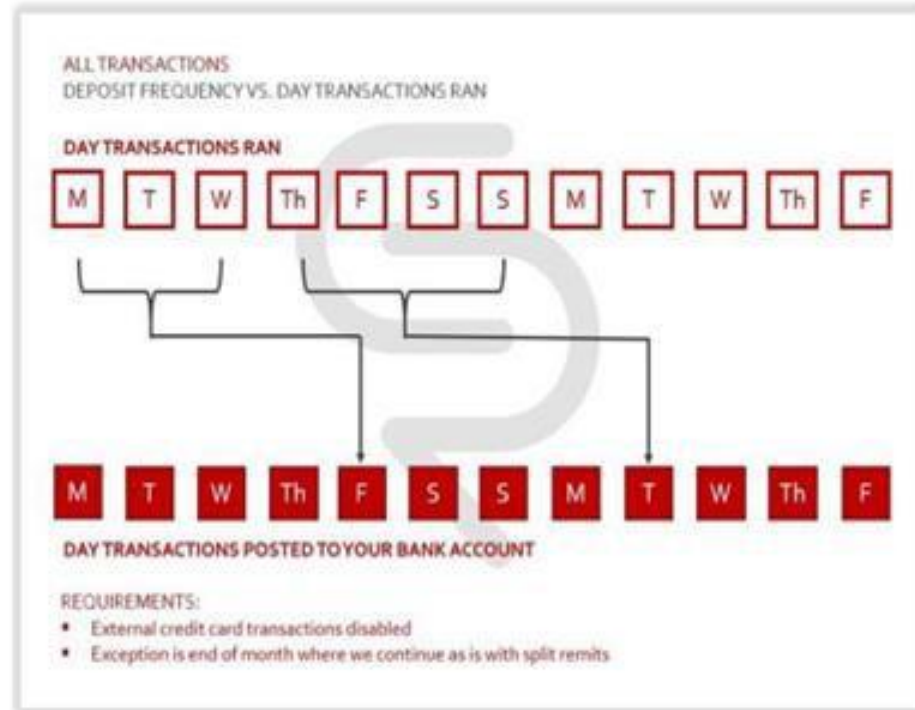
Detail	Additional Detail	Amount	Tax Amount
Amex Draft Fee (280.00 drafted at 0.50% from 1/20/2020 to 1/22/2020)	Club/ClubReady	(\$1.40)	\$0.00
Amex Draft Fee (320.00 drafted at 0.50% from 1/23/2020 to 1/26/2020)	Club/ClubReady	(\$1.60)	\$0.00
Amex Draft Fee (89.00 drafted at 0.50% from 1/27/2020 to 1/29/2020)	Club/ClubReady	(\$0.45)	\$0.00
Add To Credit Balance For SMS, Mail etc - \$60.00	Club/ClubReady	(\$60.00)	
Amex Draft Fee (360.00 drafted at 0.50% from 2/3/2020 to 2/5/2020)	Club/ClubReady	(\$1.80)	\$0.00
Amex Draft Fee (320.00 drafted at 0.50% from 2/10/2020 to 2/12/2020)	Club/ClubReady	(\$1.60)	\$0.00
Feb Tech Fee	Club/ClubReady	(\$50.00)	\$0.00

# Remit Report: Deposits

## **FAQS: REMIT PROCESS**

### **Q. HOW OFTEN WILL I RECEIVE REMIT DEPOSITS?**

A. You will receive twice weekly remit deposits. Please see the deposit schedule below to understand which day(s) are included in your corresponding deposit.



### **Q. WHY IS THERE A 'LAG' IN GETTING MY DAILY DEPOSITS?**

A. There is a 2 business-day delay in receiving your funds because ClubReady must first have the funds deposited into our trust account before we can initiate funds into your bank account.

# Additional Training Resources

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## Overview Of Full Service Remit

<https://clubready.zendesk.com/hc/en-us/articles/360042106232-Overview-Of-Full-Service-Remit>

## Troubleshooting: Remit Report (Full Service Only)

<https://clubready.zendesk.com/hc/en-us/articles/360042106192-Troubleshooting-Remit-Report- Full-Service-Only->





Reports

# Key Reports

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Help > Knowledgebase Articles

Complete Guide To Intelligence Reports:

<https://clubready.zendesk.com/hc/en-us/articles/4412518236301-Complete-Guide-Of-Intelligence-Reports>

Complete Guide To Credits / Bookings Reports:

[https://clubready.zendesk.com/hc/en-us/articles/4412517825165-Complete-Guide-Of-Credits-Bookings- Reports](https://clubready.zendesk.com/hc/en-us/articles/4412517825165-Complete-Guide-Of-Credits-Bookings-Reports)

Complete Guide To Member Reports:

<https://clubready.zendesk.com/hc/en-us/articles/4412496626317-Complete-Guide-Of-Member-Reports>

Complete Guide To Staff Reports:

<https://clubready.zendesk.com/hc/en-us/articles/4412510550413-Complete-Guide-Of-Staff-Reports>

# Key Reports

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**Help > Knowledgebase Articles**

Complete Guide To Sales Reports:

<https://clubready.zendesk.com/hc/en-us/articles/4412518710285-Complete-Guide-Of-Sales-Reports>

Complete Guide To Product Reports:

<https://clubready.zendesk.com/hc/en-us/articles/4412517412493-Complete-Guide-Of-Products-Reports>

Complete Guide To Communication Reports:

[https://clubready.zendesk.com/hc/en-us/articles/4412501086989-Complete-Guide-Of-Communications- Reports](https://clubready.zendesk.com/hc/en-us/articles/4412501086989-Complete-Guide-Of-Communications-Reports)

Complete Guide To Misc.Reports:

<https://clubready.zendesk.com/hc/en-us/articles/4412500915469-Complete-Guide-Of-Misc-Reports>



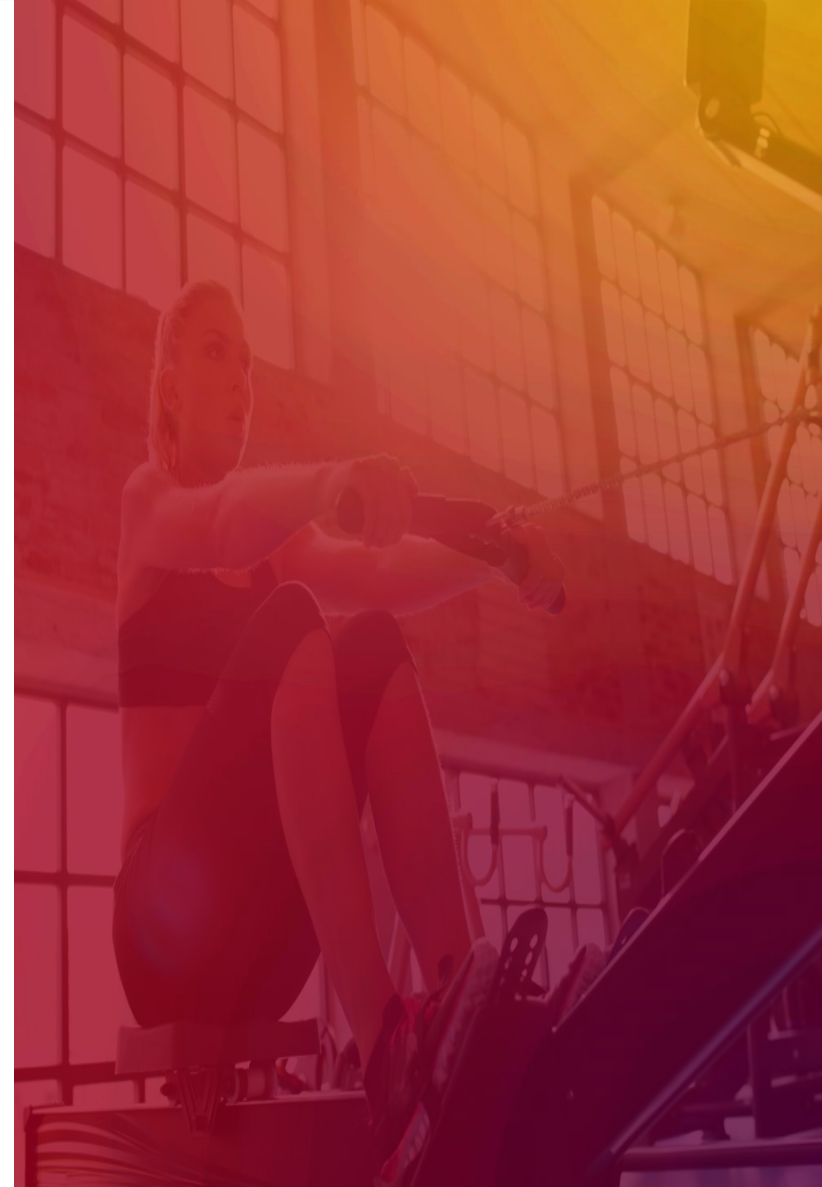
Hardware

# Recommended Hardware

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<https://clubready.zendesk.com/hc/en-us/articles/360042090312-Recommended-Hardware>

After the units have been received and setup in place please email [support@clubready.com](mailto:support@clubready.com) to schedule a remote computer setup session.





Training & Support



# Reminder: Onboarding Steps


- ☐ Complete onboarding survey
- ☐ Schedule conversion date with conversion team
- ☐ Request exit file from current software company when conversion date is set
- ☐ Access ClubReady training page
  - ☐ Register for CRUniversity
  - ☐ Download the ClubReady user guide
  - ☐ Download the hardware guide
  - ☐ Complete the hardware form
- ☐ Complete the CRUniversity learning path
- ☐ Attend ClubReady Foundations webinar(s)
- ☐ Login to the Demo Site and Practice, Practice, Practice
- ☐ Ask a lot of questions!

# Help Tab: Register for a Webinar

Click **Help > Training Calendar** in ClubReady to locate our available webinars.




 CRUniversity

 Video On Demand

 Training Calendar

 Recent Changes

 Knowledgebase  
Articles



Thursday, September 30, 2021

10:00 AM EST

All Club Staff

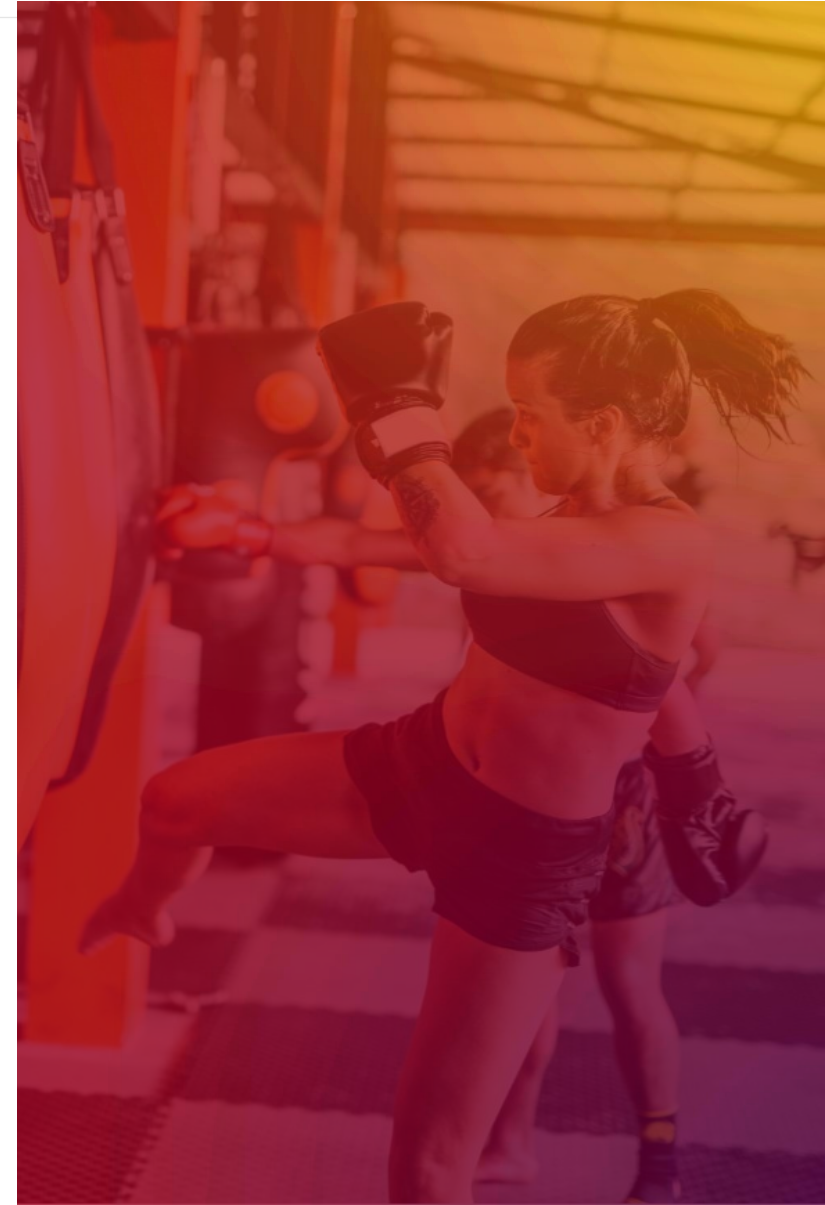
ClubReady Foundations for Staff Members (90 mins) • [view details](#)



This class covers the basics of ClubReady for Staff, Trainers and Managers. This includes: • Prospect Management • Work It • Agreement Write Up • Scheduling

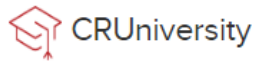
webinar URL

[https://clubready.zoom.us/webinar/register/WN\\_2gHAQjEmRmGx8HLtBmQ0fw](https://clubready.zoom.us/webinar/register/WN_2gHAQjEmRmGx8HLtBmQ0fw)





# Help Tab: Additional Resources



CRUniversity



Video On Demand



Training Calendar



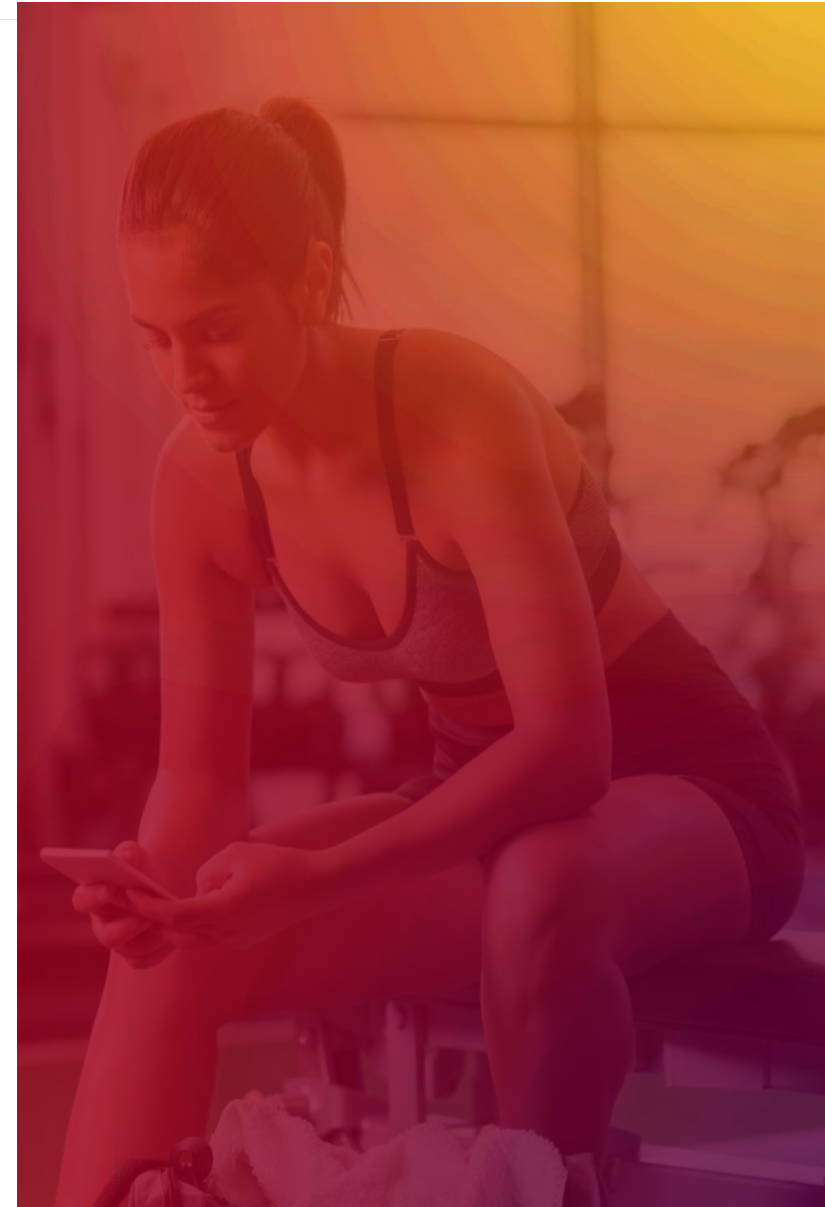
Recent Changes



Knowledgebase  
Articles

Click the **Help** tab in ClubReady to locate more resources such as:

- **CRUniversity** – Access our learning portal for video tutorials.
- **Recent Changes** – Read more on our latest updates.
- **Video On Demand** – Watch our key topic videos.
- **Knowledgebase Articles** – Search for our 'how to' guides.
- **Training Calendar** – View and register for available webinars.





CRUniversity provides Learning Paths and Courses designed to assist you in mastering ClubReady through a series of video tutorials. The Courses cover everything from the Menu and how to navigate the site, how to sell agreements, using the Point of Sale, Scheduling, and more!

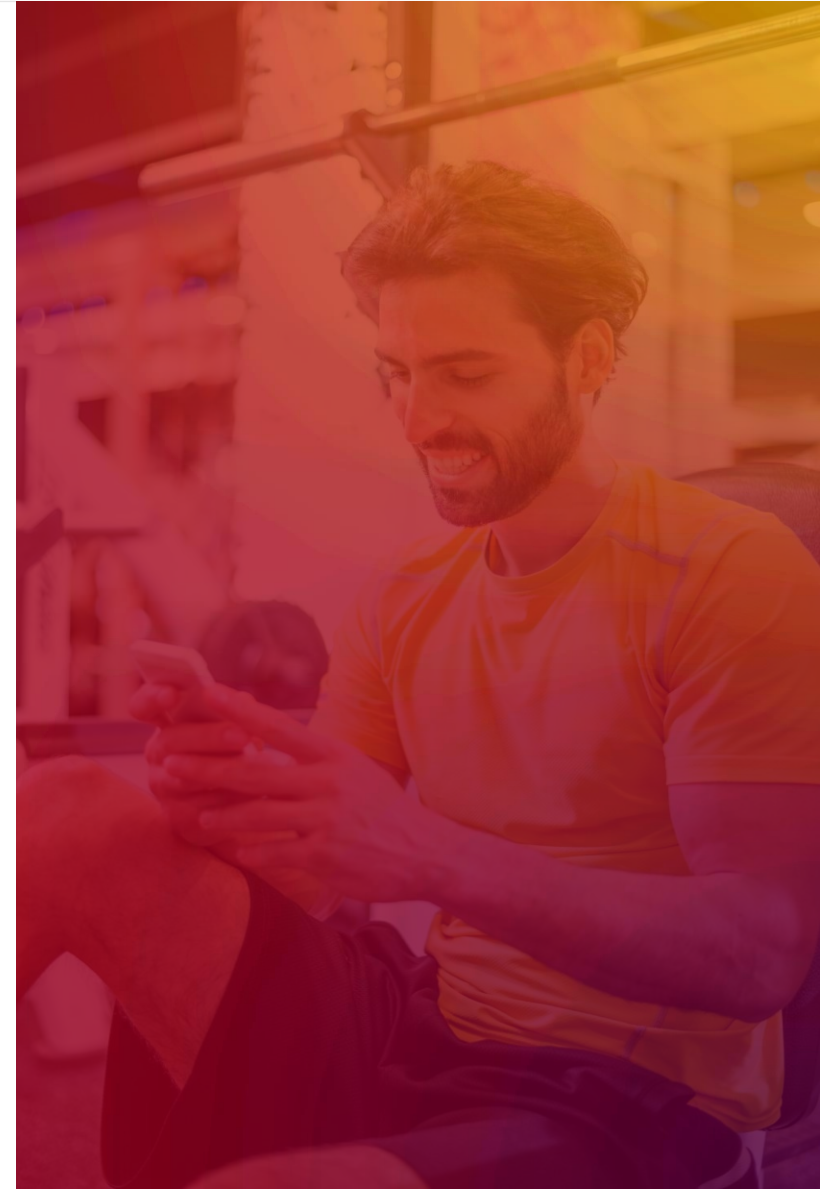
The following codes will automatically register you for the appropriate Foundations Learning Path:

- For Membership Clubs, enter the code: **FoundationsMember**
- For Studio Clubs, enter the code: **StudioFoundations**

Copy the corresponding code that applies to your location and click on the following link to create your account: <https://cruniversity.litmos.com/self-signup/>

You will then receive an email that creates your login and password at <https://cruniversity.litmos.com>

Each Learning Path is made up of several courses that train the user on using the ClubReady software. You can follow the Learning Path that has been constructed, or you can look at different courses based on your individual needs in the Course Library.

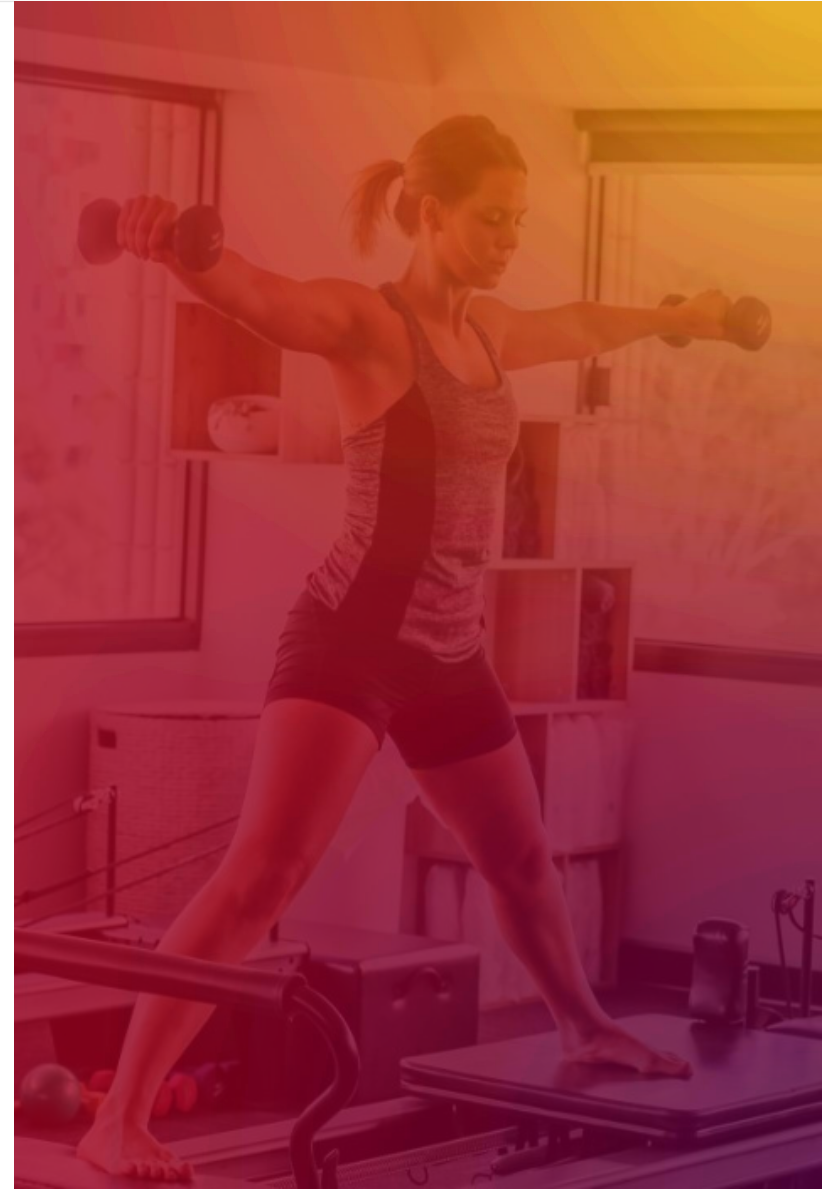


# Training Home Page

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Locate all ClubReady resources in our customized Training Page from CRUniversity, User Guide, and On Demand Videos in a “one-stop” shop:

<https://www.clubready.club/foundations-training>



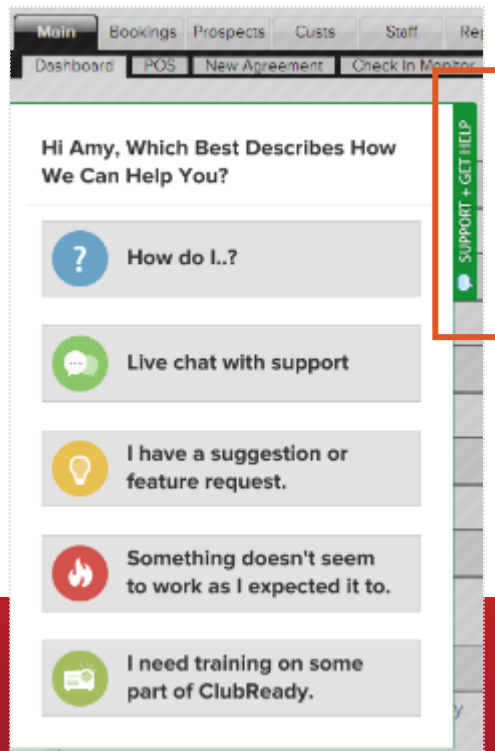


# ClubReady Support Emails

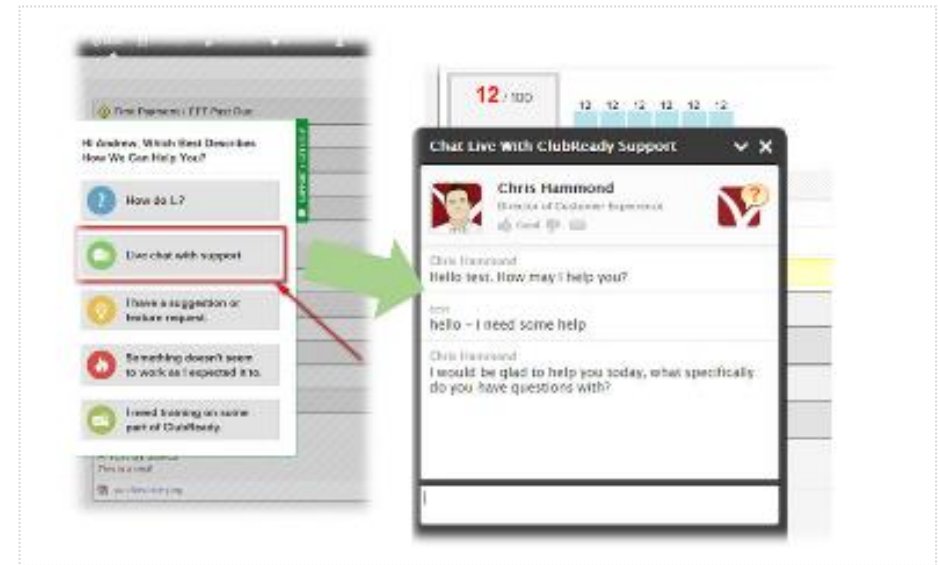
- ☐ [support@clubready.com](mailto:support@clubready.com)
- ☐ [chargebackinquiries@clubready.com](mailto:chargebackinquiries@clubready.com)
- ☐ [pdcc@clubready.com](mailto:pdcc@clubready.com)
- ☐ [sales@clubready.com](mailto:sales@clubready.com)

# Support + Get Help

Got a problem or need help? Please open a support request by using the green **“SUPPORT + GET HELP”** tab on the left-hand side of your screen or send an email to [support@clubready.com](mailto:support@clubready.com)



Live chat shows as an option in the support slide out and allows you to chat directly with the support team. Chats can also be converted into help desk support tickets if a resolution is not available during the chat session.



**You can also reach our support team at 1-800-405-4818**  
MON – FRI: 6AM – 9PM CST | SAT – SUN: 8AM – 5PM CST

## Stay Connected with ClubReady!

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Like us on Facebook for updates on enhancements, how-to's and ClubReady news.



Follow us on Instagram for updates on enhancements, how-to's and ClubReady news.



For updates on enhancements and ClubReady news follow @ClubReady



Subscribe to receive status notifications on active incidents or upcoming maintenances  
<http://status.clubready.com/>

## Need Help? Here's How to Get It

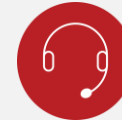
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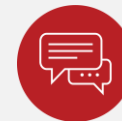
Submit a ticket



Post on the Help Forums



Call for help: **1-800-405-4818**



Use Live Chat



Email us for help: **[support@clubready.com](mailto:support@clubready.com)**