ClubReady

Mayweather Boxing + Fitness

User Guide

Demo Site

Mayweather Boxing + Fitness Demo Site
http://www.mwbfdemo.clubready.com
Username: Mayweatherdemo
Password: demo

Welcome Email, Setup Request, & Attachments

Welcome Email

Good Afternoon, Welcome to ClubReady!!

Your ClubReady site has been created, and a Merchant Specialist will be contacting you shortly to help you get started, obtain necessary documentation, and complete Merchant setup. I will be working with you to get your presale package set up, as well as numerous other items for your site. Please use the link below to setup your 1st training call.

https://calendly.com/diane-27/60-min-call

The training will cover the following:

Basic Navigation/ 3 main tabs

1. small menu/large menu
2. Learn tab
3. Support & Get Help
4. Dashboard widgets
5. Prospects vs Members
6. Entering Staff
7. Practice site
8. POS/Inventory

There will be a second email that will follow for requested information to start the setup of your New Mayweather Site.

Attachments:

1. Intro Guide
2. Hardware Guide
3. ClubReady Foundations Owner / Admin Training

Please use this link to order your Hardware - **https://form.jotform.com/91416388856167**

Welcome to ClubReady!!

Setup Request

Welcome to ClubReady, my name is Diane, and I will be setting up your New Mayweather Boxing site.
To help me with the process I would appreciate the following information to get me started:

1. Confirm your clubs address

2. Confirm your clubs telephone number

3. The Sales tax for your State and if the tax should be applied to the following
   - Products
   - Clothing
   - Memberships
   - I need to know you sales tax rates are for Memberships, Membership Fees, Services (PT and other services you may offer outside of membership), and Products. I also need to know if clothing items are taxable or if you have any other special tax rates we need to be aware of."

4. When do you plan on starting your pre-sale?

5. When do you plan on going live? (Opening)

6. Has your lease been signed?

7. Your direct contact number

Thank you for the information and I look forward to working with you!

Diane

Attachment Example

ClubReady

ClubReady Foundations Owner / Admin Training

This webinar is designed for owners who have gone through setup with your setup specialist. During this webinar we will cover items that you might have not learned about, however, it will be beneficial in managing your club. If you would like to review some basics, please join our live webinars located under Learn > Training.

Learn Tab

CLICK on *underlined text* for more training info!

Setup > ClubReady Invoices

- Paid and Unpaid Invoices
- Add Credit
- Payment Preferences

Things to Know - within ClubReady Invoices, you will be able to view any Paid or Unpaid Invoices for your ClubReady billing. You will be able to update the Credit Card on file for payment as well.

Setup > General

- Check In Web Kiosk
- ClubReady Desktop App

Key Notes – Each Check In method will have its own functionalities and advantages. Click Here to view a comparison to select an option that better suits your club.

Setup > Communications

- Communication Settings
- System Emails
- Announcements
- Internal Reports

Setup > Automation

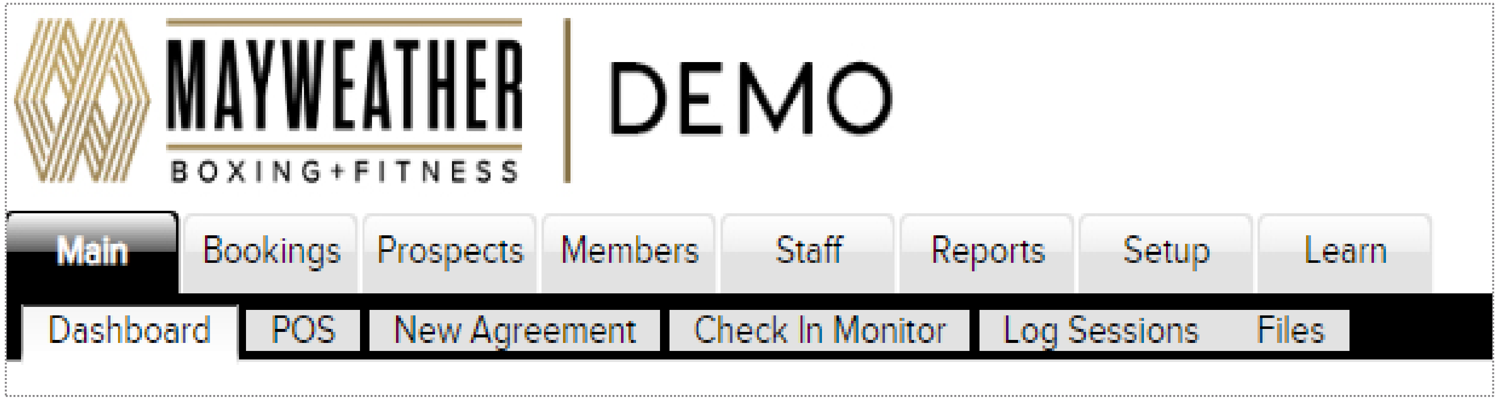
- Lead Assignment

MAYWEATHER BOXING+FITNESS

Hardware Reference

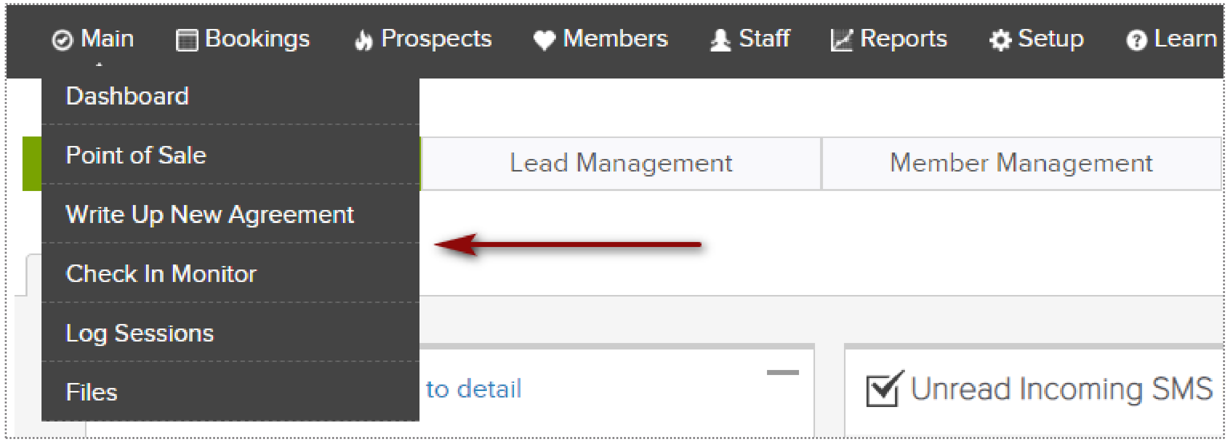
- ✓ Place your order using the following link - https://form.jotform.com/91416388856167
- ✓ Any hardware that does not exactly match the items in this guide will have limited to no support by ClubReady Support.
- ✓ Please allow 2-4 weeks for delivery from date of form acceptance.
- ✓ Please contact support@clubready.com or use our Live Chat when this equipment is in place for final configuration & testing via remote computer session with a ClubReady Hardware Technician.

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

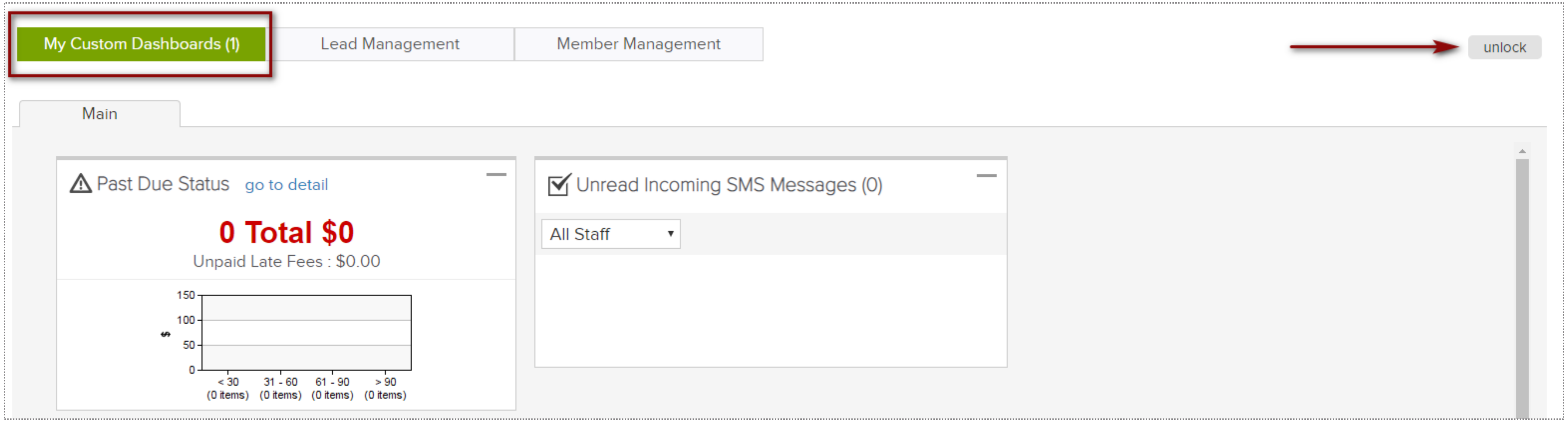


This menu style takes up less space but has no club logo. This menu style offers the same menu options, with a drop down menu's as a single menu strip along the top of the page.

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

Custom Dashboard & Widgets

Main > Dashboard

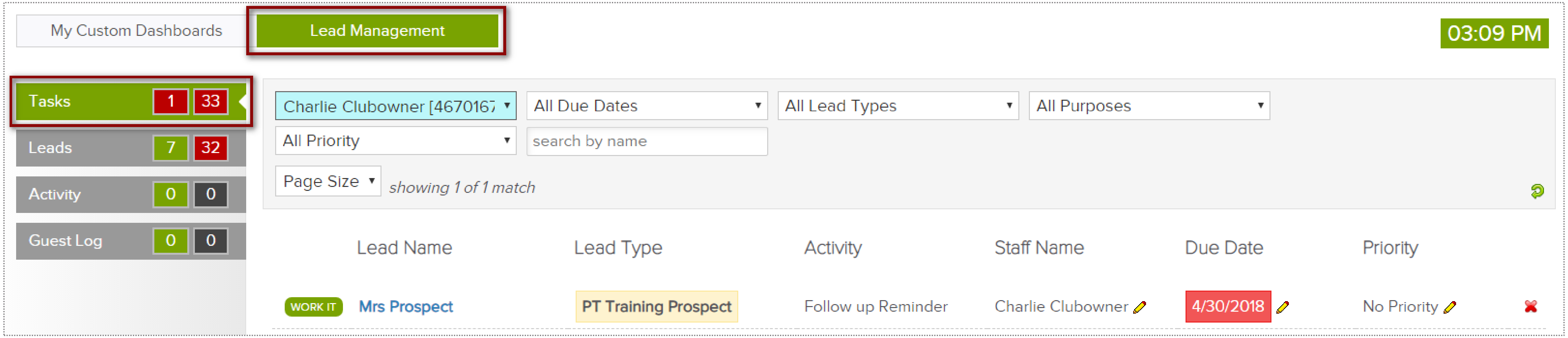


This dashboard allows for you to add, arrange and delete widgets. Widgets show quick reports or allows for quick actions to be completed by a staff.

Managing Your Dashboard - https://www.clubready.com/wiki/WK27678848655

Lead Management Dashboard: Tasks

Main > Dashboard



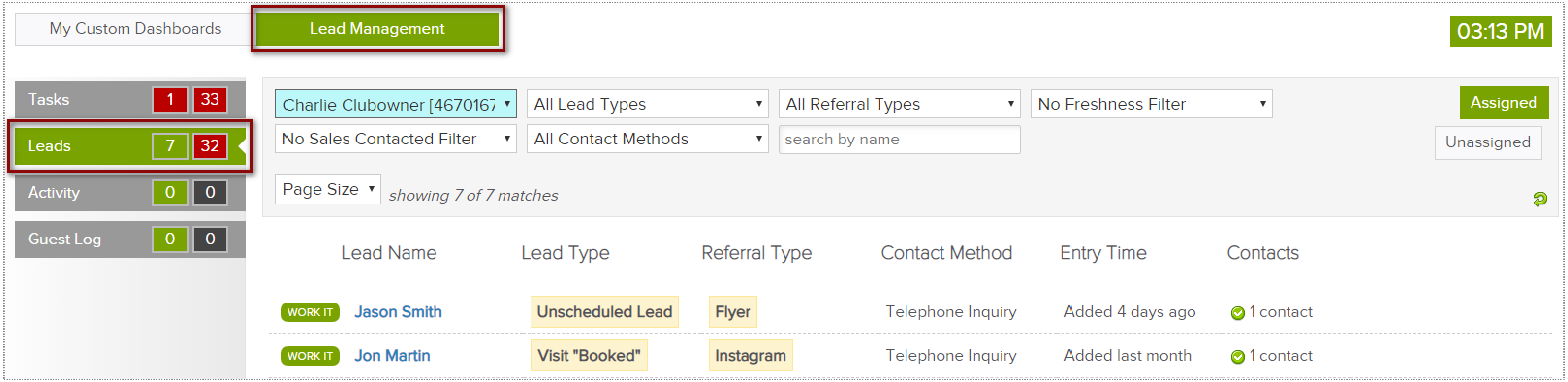
The **Tasks** tab will display all of the tasks created for membership prospects only. The number displayed to the left show tasks assigned to the staff member currently logged in. The number displayed to the right show tasks for all the club.

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.

Note: After selecting your filters, make sure to refresh your screen by scrolling to the bottom of the page to view the new results.

Lead Management Dashboard: Leads

Main > Dashboard



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.

Note: After selecting your filters, make sure to refresh your screen by scrolling to the bottom of the page to view the new results.

MAYWEATHER
BOXING + FITNESS

Lead Management Dashboard: Activity

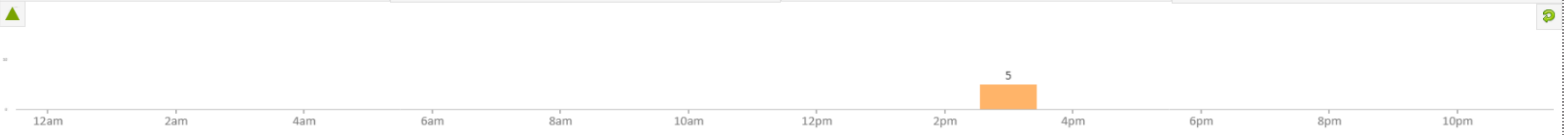
Main > Dashboard

Tasks Done	4
Calls Made	1
Emails Sent	1
SMS Sent	1
Person to Person	1

Bookings	0
Today	0
Tomorrow	0
Future	0

New Leads	1
Referrals	1
Walk In	0
Phone	0
Email / Web	0
Guerilla Marketing	0

New Deals	0
Members Created	0
POS Referrals	0

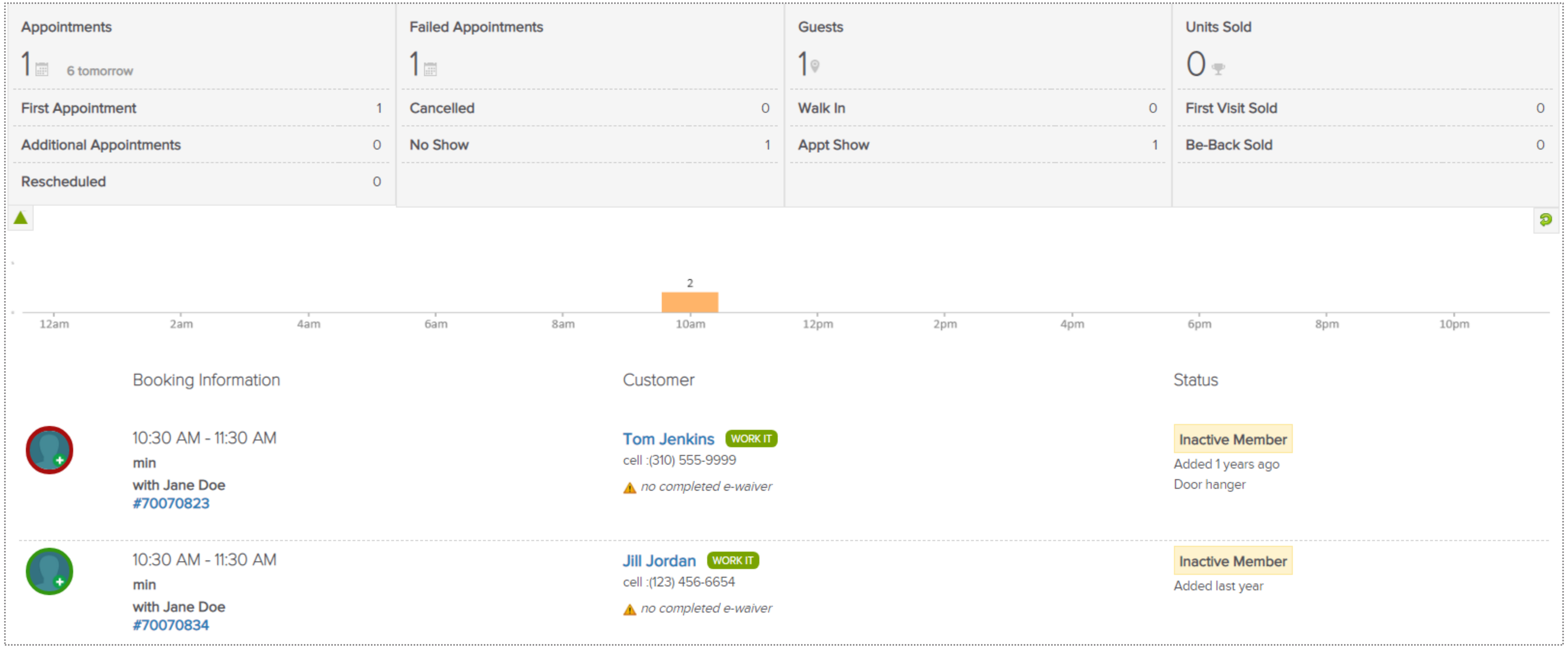


	Time	Lead Name	Activity	Staff Name	Status
WORK IT	3:19 PM	Sarah Lee	No contact type	Charlie Clubowner	Unscheduled Lead
WORK IT	3:18 PM	Tim Lee	Called - Left VM	Charlie Clubowner	Unscheduled Lead
WORK IT	3:17 PM	Meredith Todd	Sent Text	Charlie Clubowner	Visit "Booked"
WORK IT	3:16 PM	Jim Smith	Emailed	Charlie Clubowner	Visit "Booked"
WORK IT	3:15 PM	Mister Customer	face to face	Charlie Clubowner	PT Training Prospect

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

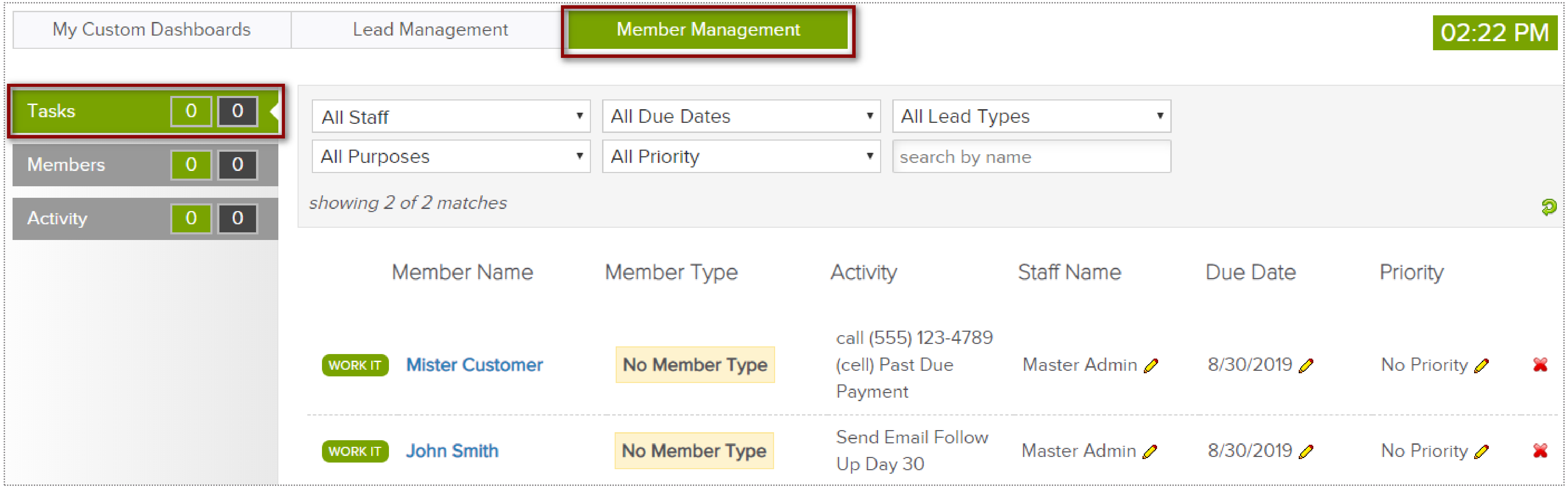


The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments, Failed Appointments, Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.

MAYWEATHER BOXING+FITNESS

Lead Management Dashboard: Tasks

Main > Dashboard



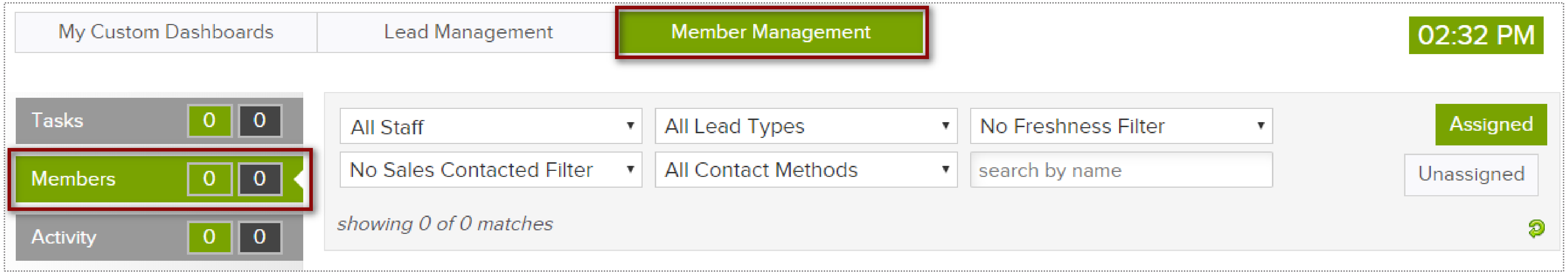
The **Tasks** tab will display all of the tasks created for members only. The number displayed to the left show tasks assigned to the staff member currently logged in. The number displayed to the right show tasks for all the club.

The screen will display a list of tasks with the **Member 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.

Note: After selecting your filters, make sure to refresh your screen by scrolling to the bottom of the page to view the new results.

Lead Management Dashboard: Members

Main > Dashboard



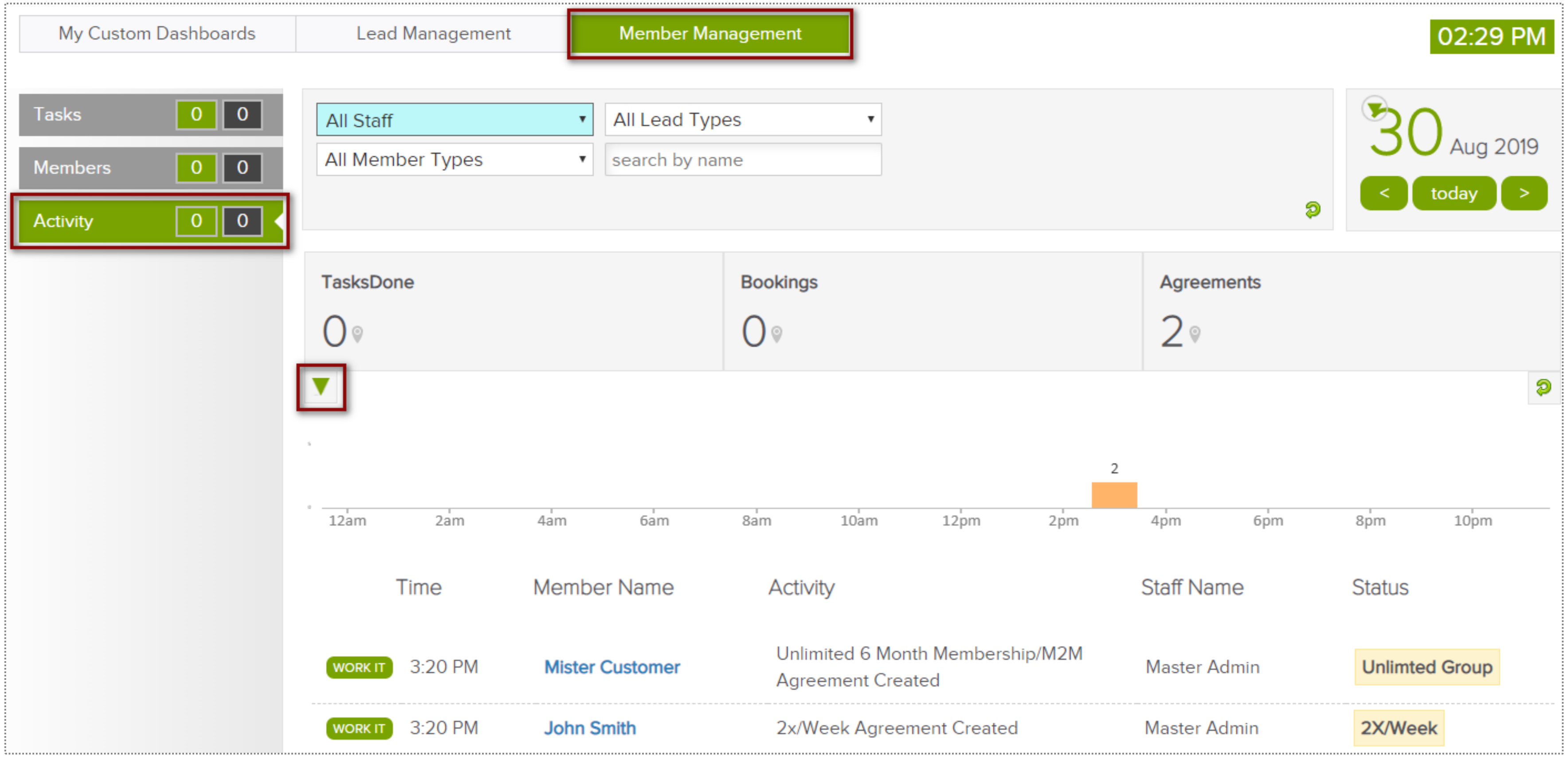
The **Members** tab will display all of the members in your site. The number displayed to the left show members assigned to the staff member currently logged in. The number displayed to the right show all of the club's members.

The screen will display a list with the **Member 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.

Note: After selecting your filters, make sure to refresh your screen by scrolling to the bottom of the page to view the new results.

Lead Management Dashboard: Activity

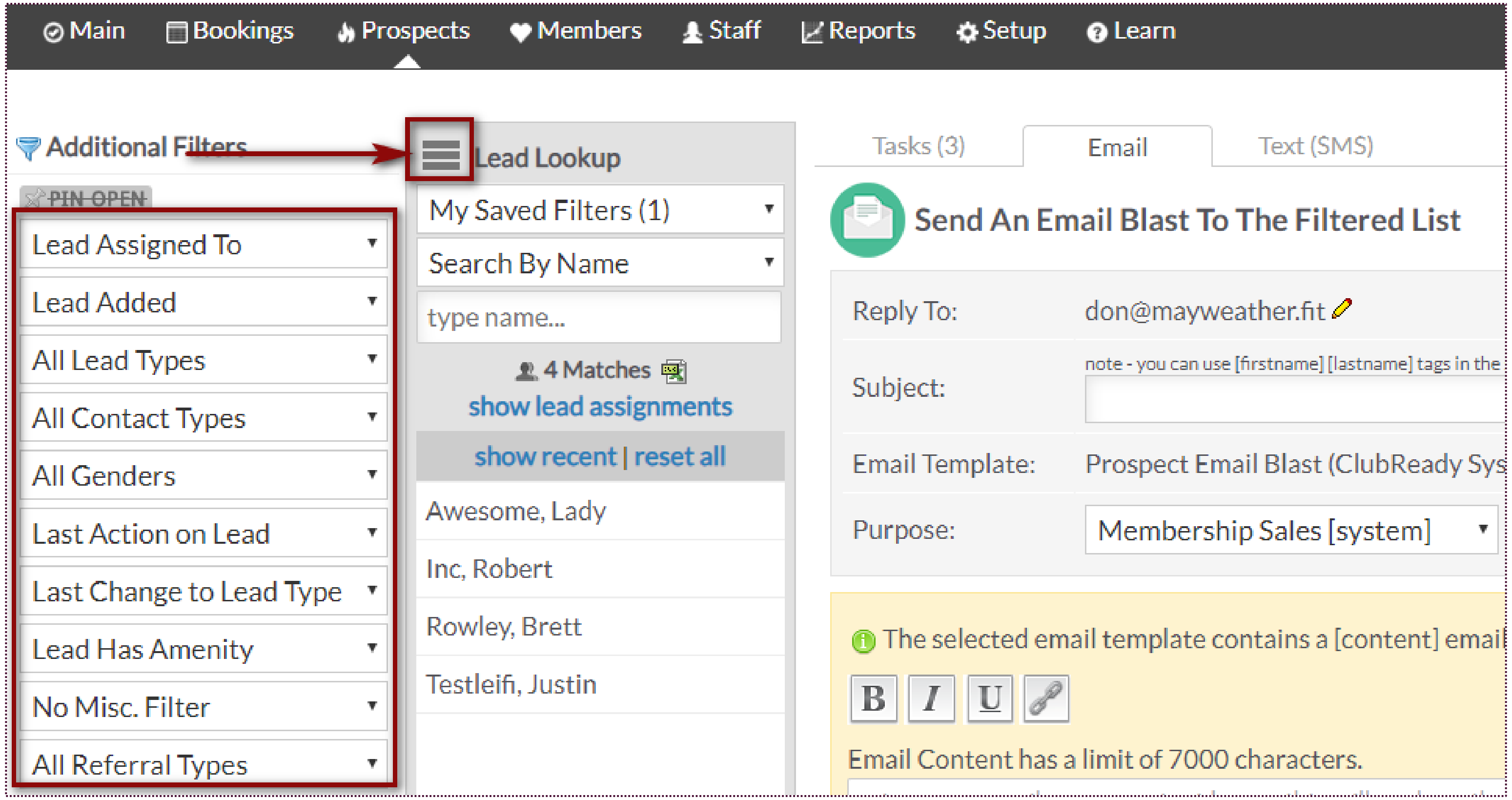
Main > Dashboard



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

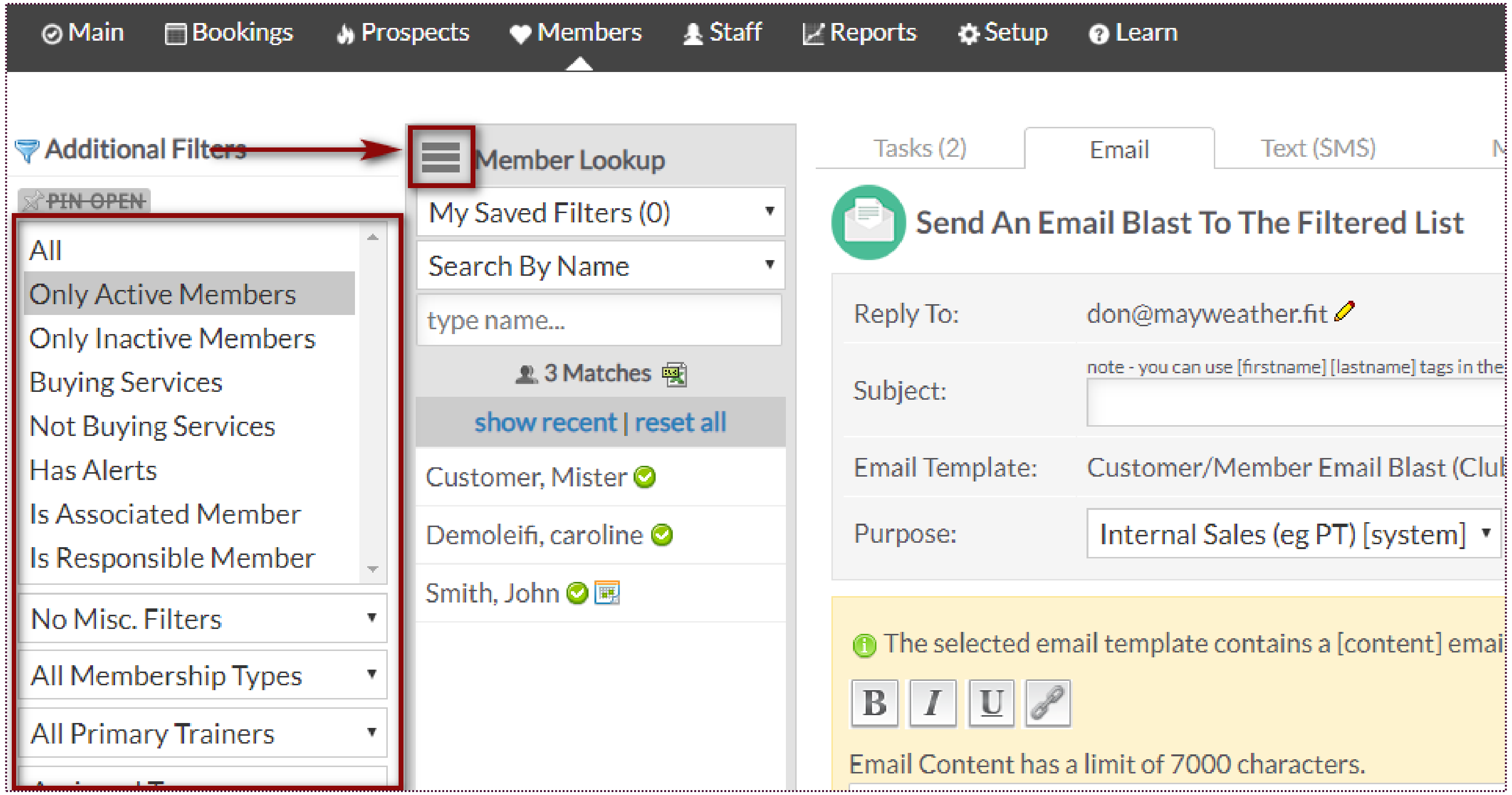
Lookup Prospect

Prospects > Membership Prospects



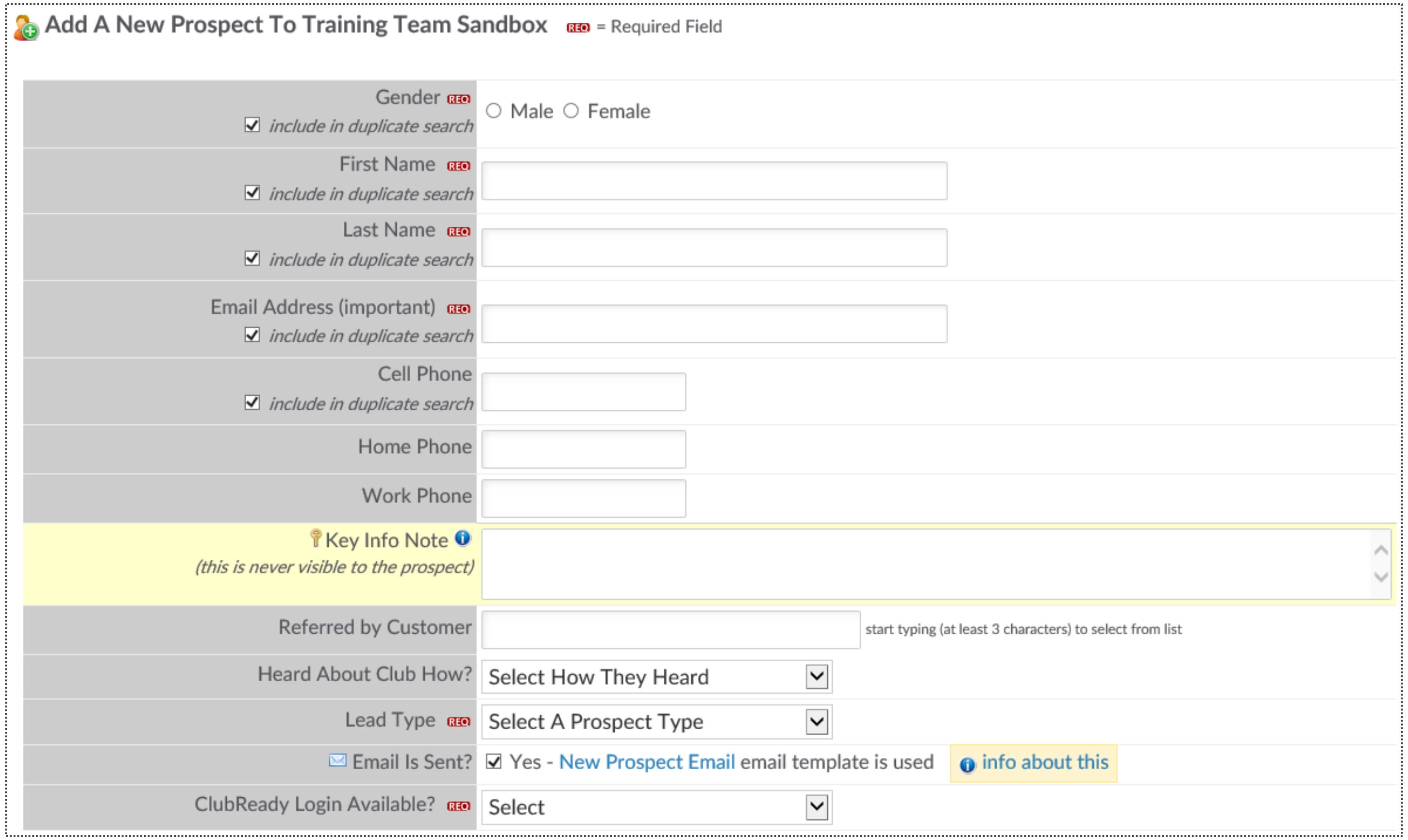
Lookup Members

Members > Lookup



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 REQ ☑ *include in duplicate search*	○ Male ○ Female
First Name REQ ☑ *include in duplicate search*	
Last Name REQ ☑ *include in duplicate search*	
Email Address (important) REQ ☑ *include in duplicate search*	
Cell Phone ☑ *include in duplicate search*	
Home Phone	
Work Phone	
Key Info Note *(this is never visible to the prospect)*	
Referred by Customer	start typing (at least 3 characters) to select from list
Heard About Club How?	Select How They Heard
Lead Type REQ	Select A Prospect Type
Email Is Sent?	☑ Yes - New Prospect Email email template is used info about this
ClubReady Login Available? REQ	Select

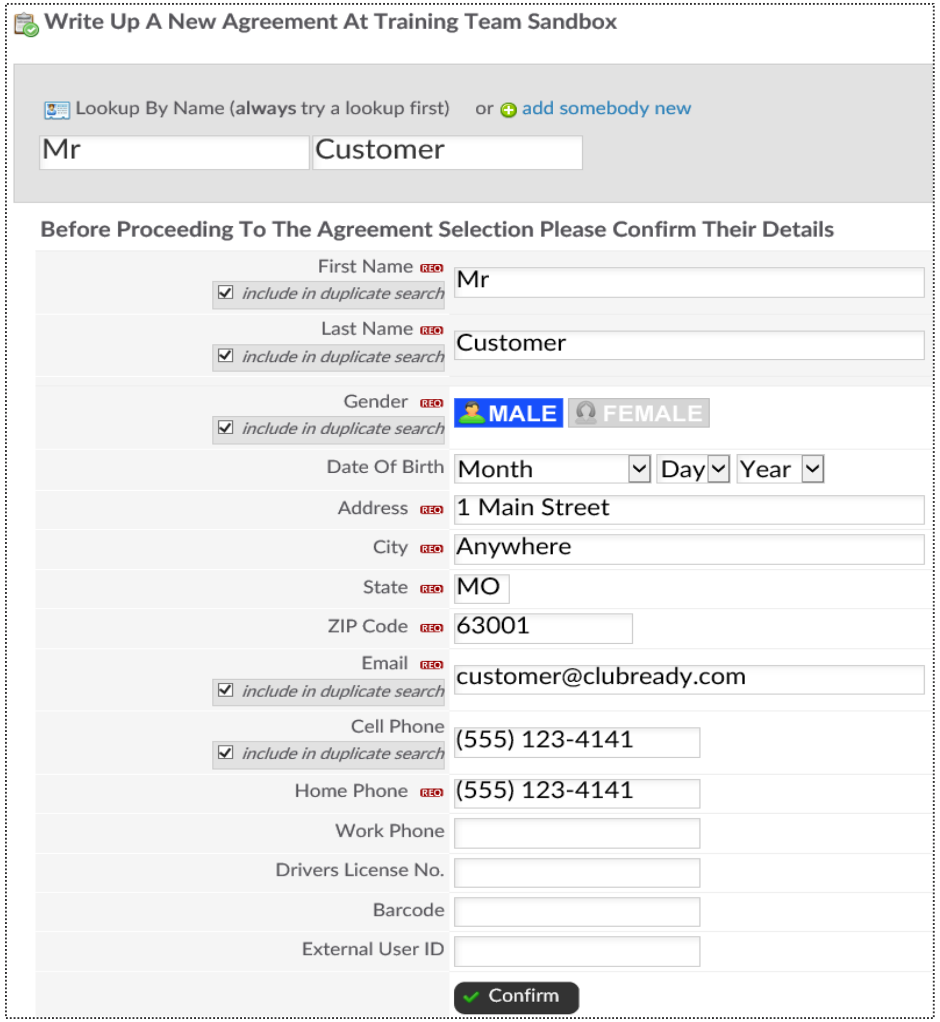
Click on **Prospect > Add New Prospect.** Any fields with the REQ icon will have to be completed to save your prospect.

MAYWEATHER BOXING+FITNESS

Sales Process

Writing an Agreement

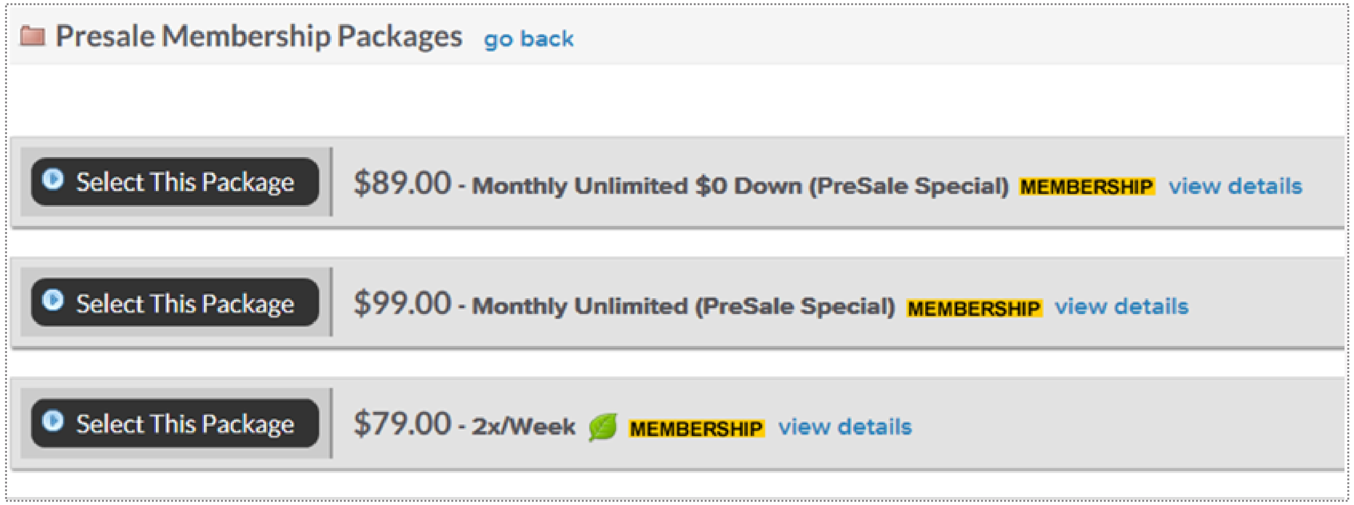
Main > New Agreement > Select Person > Confirm



All fields that have the required icon (**REQ**) need to be filled out. All other fields are optional. Once you have verified all information click **Continue to Packages**.

Writing a Membership Agreement

Select Plan > Adjust Pricing & Pay Dates

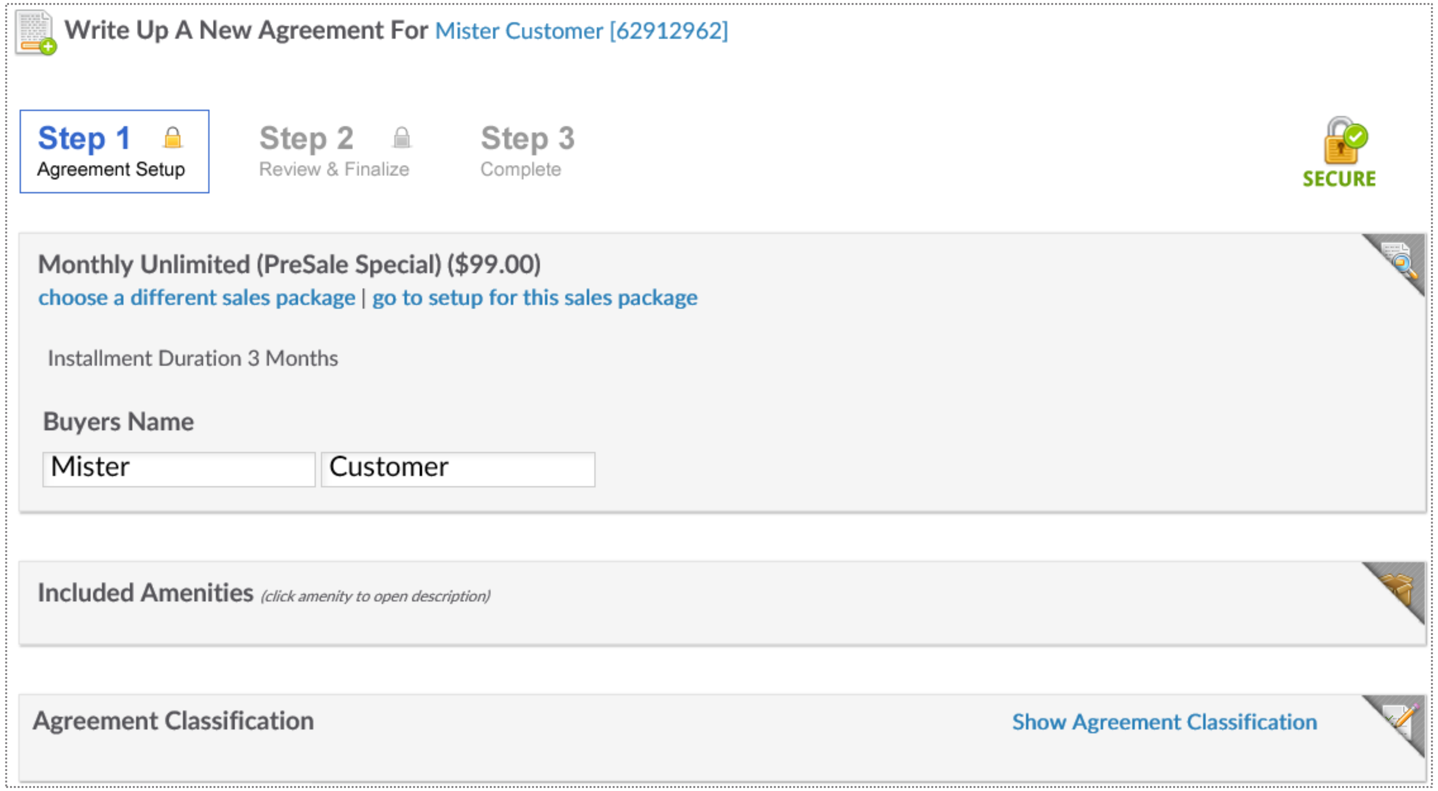


Select the package the customer is interested in purchasing. Click **Select This Package.**

MAYWEATHER BOXING+FITNESS

Writing a Membership Agreement

Select Plan > Adjust Pricing & Pay Dates



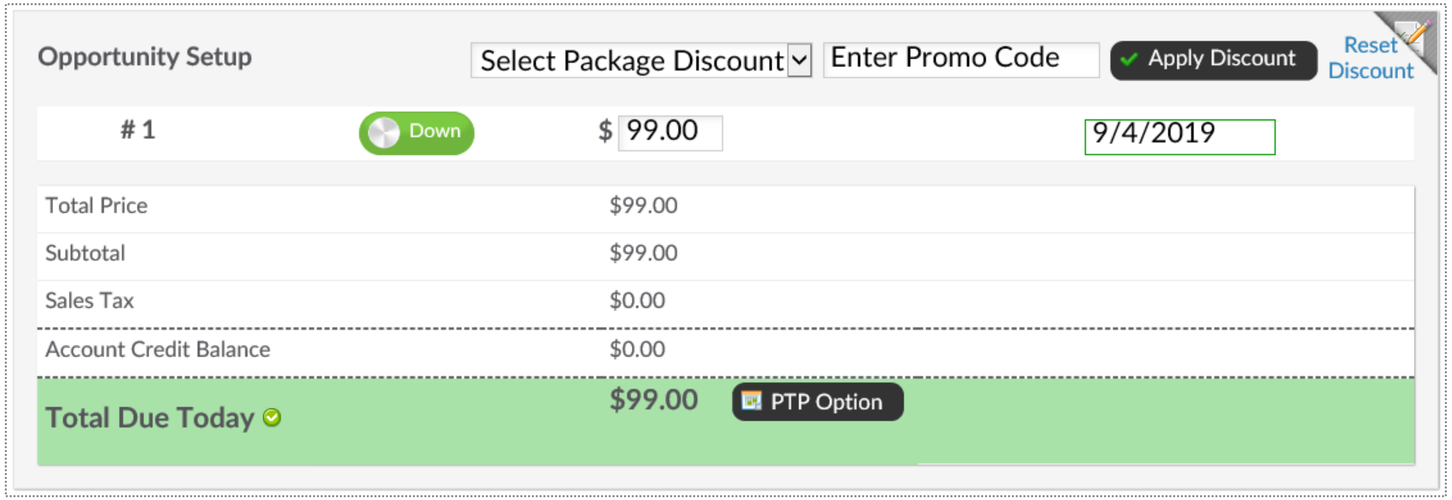
Step 1: After selecting the Sales Package Folder and desired package you will be taken to the **Write Up A Agreement For** screen.

Buyers Name - You have the ability to adjust who will be making the purchase today.

MAYWEATHER BOXING+FITNESS

Writing a Membership Agreement

Select Plan > Adjust Pricing & Pay Dates



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.

MAYWEATHER BOXING+FITNESS

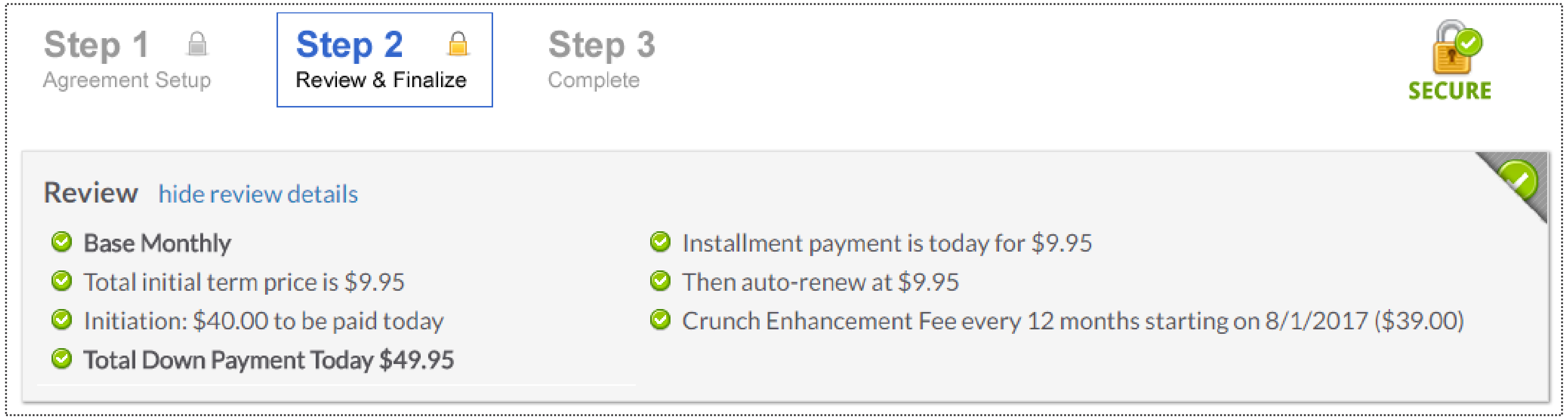
Writing a Membership Agreement

Assigning Sales Commission & Member Contact

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.**

Writing a Membership Agreement

Review Terms > Take Signatures

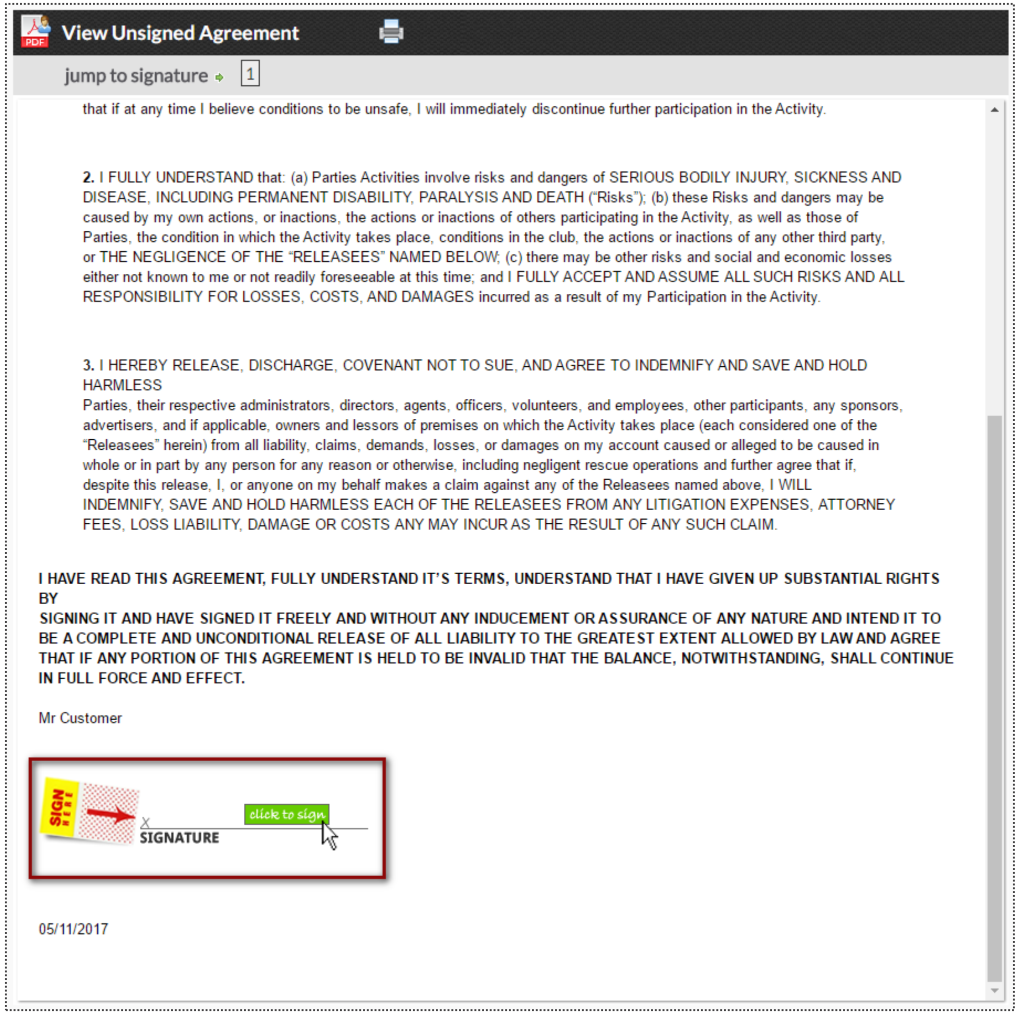


Take a minute to review the terms of the agreement and confirm they are accurate.

Select here to open full agreements for signatures.

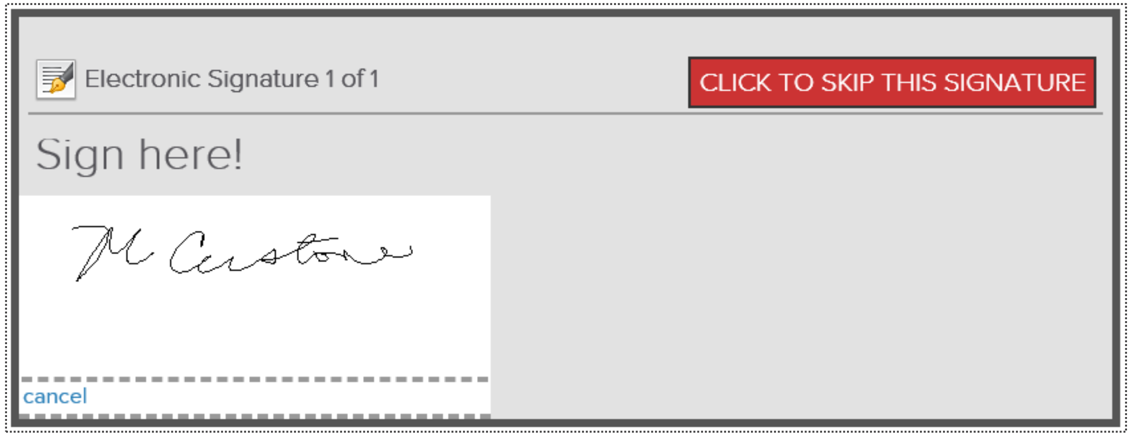
Taking Signatures

Review Contract & Take Signatures



Take the member's signature using the signature capture method setup for your club. When signing an agreement using the PC, you are able to use a signature pad. If using a tablet, you will use on-screen using (member will use their finger).

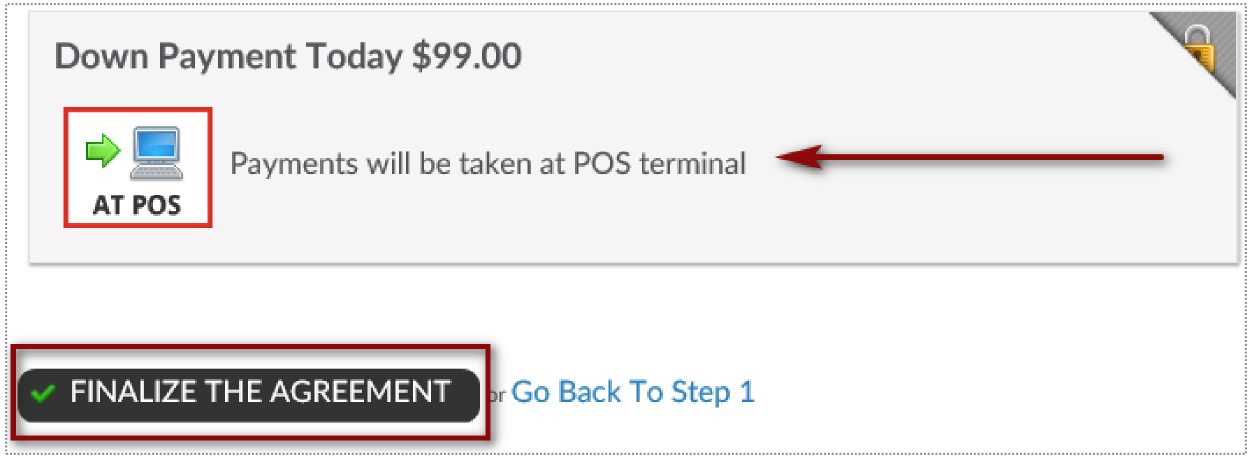
When performing a phone sale, you have the option to skip signatures. Next time the member checks in, they can sign the agreement.



MAYWEATHER
BOXING+FITNESS

Writing a Membership Agreement

Take Payment & Finalize the Deal



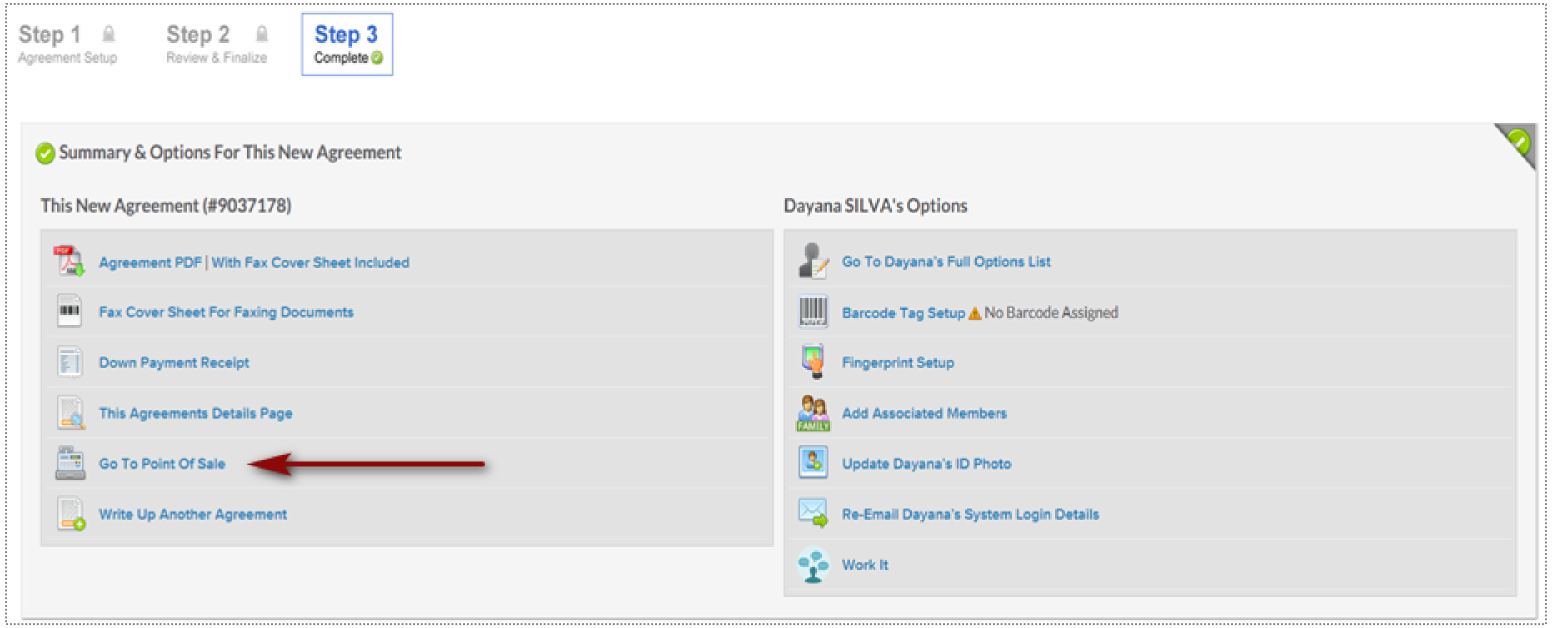
Select **AT POS** to continue the process and collect payment.

Click **Finalize the Agreement**.

Note: The agreement will be automatically emailed to the member at this point.

Writing a Membership Agreement

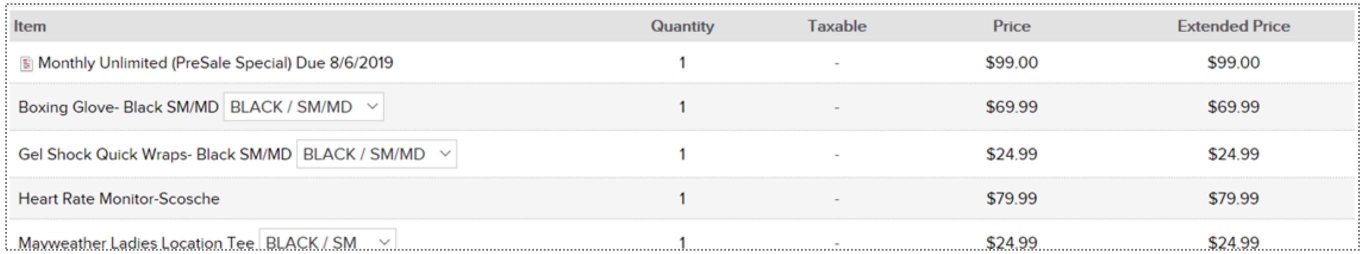
Take Payment & Finalize the Deal



Select **Go To Point Of Sale** to proceed to the terminal.

Note: The agreement fee will be automatically added to the cart.

Point of Sale: Taking Agreement Payment



Item	Quantity	Taxable	Price	Extended Price
Monthly Unlimited (PreSale Special) Due 8/6/2019	1	-	$99.00	$99.00
Boxing Glove- Black SM/MD BLACK / SM/MD	1	-	$69.99	$69.99
Gel Shock Quick Wraps- Black SM/MD BLACK / SM/MD	1	-	$24.99	$24.99
Heart Rate Monitor-Scosche	1	-	$79.99	$79.99
Mayweather Ladies Location Tee BLACK / SM	1	-	$24.99	$24.99

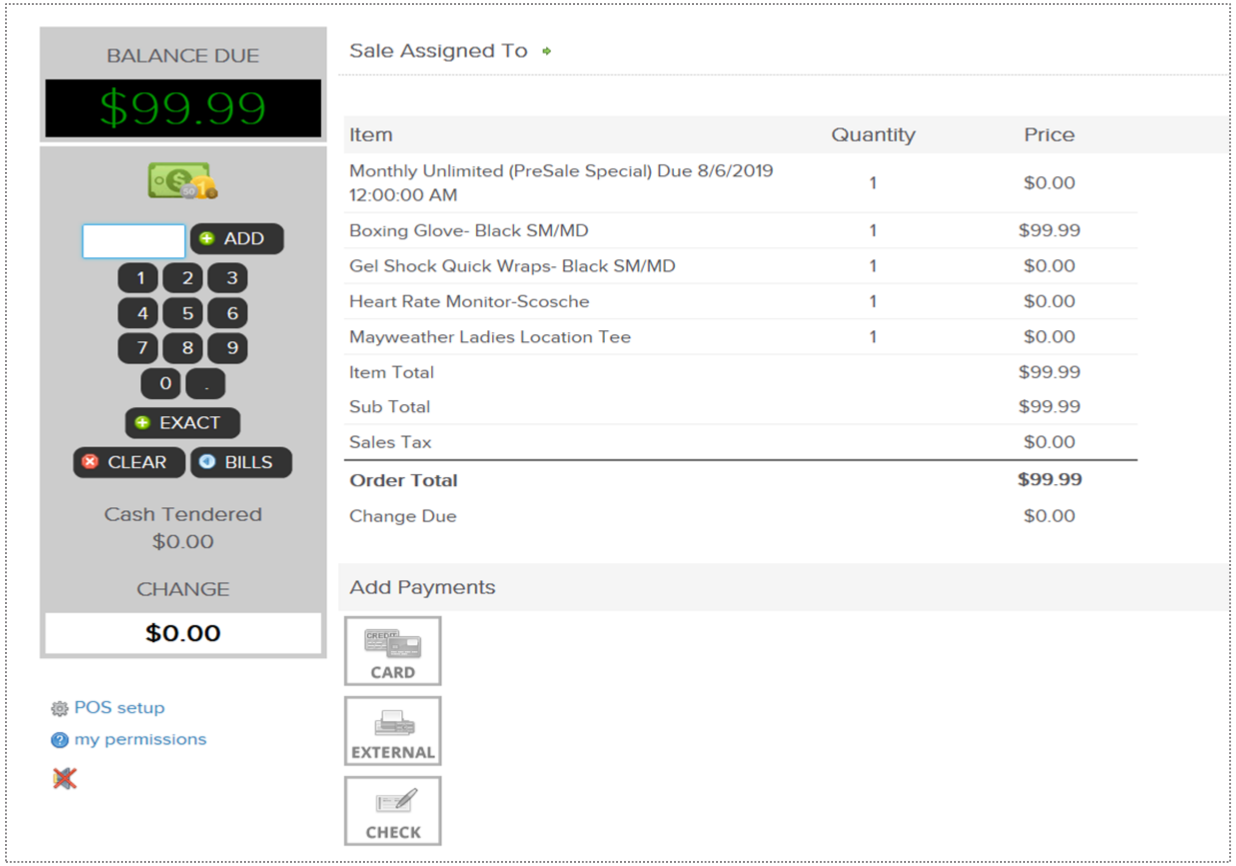
Select from the left POS Quickpad **Essentials Kit**. You can also locate other products by selecting **Product Search**.

Once all items are in the cart, **adjust price of Gloves to $99.00 and $0 the rest** (Click on the product to change price and click **Update**).

Proceed to **CHECKOUT** to select payment method.

Taking Payment

Select the appropriate payment method.



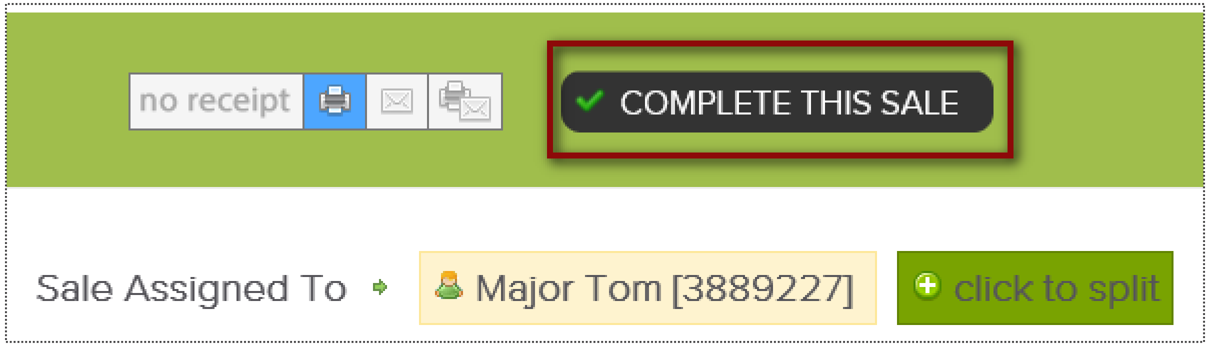
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

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.



At **CHECKOUT** select the payment method and who will get credit for the sale by clicking on the staff name. Next, click **COMPLETE THIS SALE** to finalize purchase.

Bulk Upload Inventory

Reports or Setup > Products > Bulk Upload Inventory

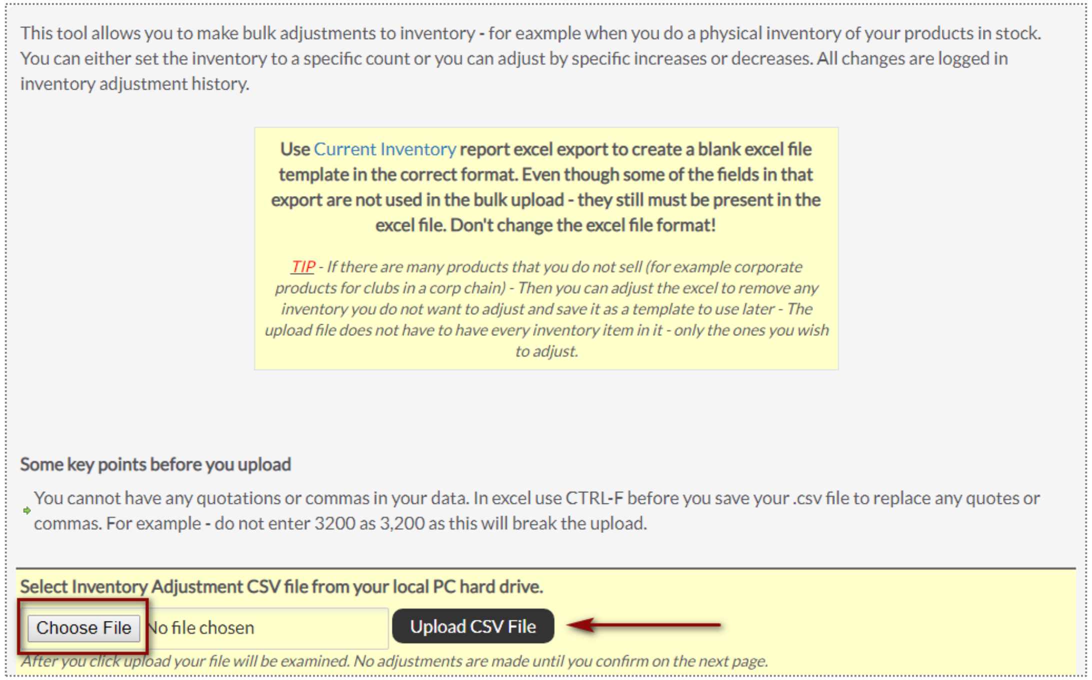
This report is a tool that allows you to make bulk adjustments to inventory. All changes are logged in inventory adjustment history.

sku	product	quantity
492914-43288	Drawstring Bag DRAWSTRING BACK 14X18	200
492936-43290	Lanyards LANYARDS BLACK 2 X 90CM "	200
1	Mayweather Pop Up Tent Kit MAYWEATHER BLACK TENT & WALL 1	1
492929-43289	Sweat Towels SWEAT WHITE 11 X 18	200
404627	Heart Rate Monitor Rhythm Plus- Scosche Arm Band RHYTHM BLA	100
526789	Heart Rate Monitor TICKR - Wahoo Chest Band TICKR BLACK O/S"	100
422922	Location Tee- Men's	190
422926	Location Tee-Ladies'	210

Once an order is received, you will use the spreadsheet emailed to you with the order details. Copy and paste this information in the appropriate column of the Blank ClubReady Bulk Inventory Adjust spreadsheet (located under **Reports > Products > Current Inventory**), and save the document as a **.csv file**.

Bulk Upload Inventory

Reports or Setup > Products > Bulk Upload Inventory



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

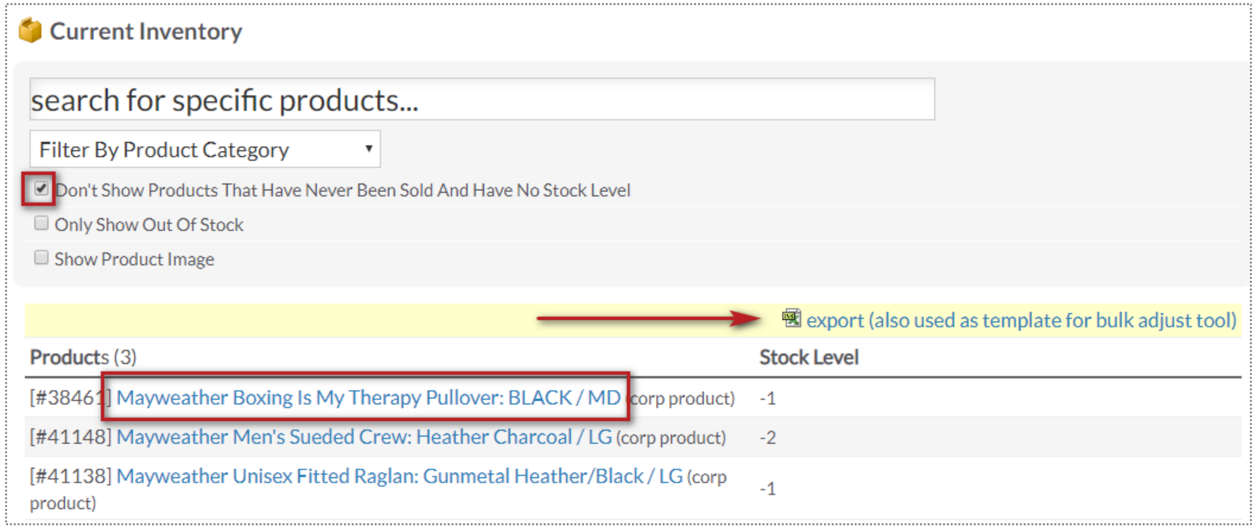
The file will be uploaded and inspected. If it is in the correct format and ready to be processed you can click on **Do Bulk Adjustment.**

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.**

Current Inventory

Reports or Setup > Products > Current Inventory

This report displays the Stock level for all your products. This report is a tool that allows you to update inventory for individual items. All changes are logged in inventory adjustment history.



When generating this report, you will be able to filter by using the **search for specific products... search bar, Filter By Product Category** dropdown menu, **Don't Show Products That Have Never Been Sold And Have No Stock Level, Only Show Out Of Stock** and **Show Product Image** check boxes.

Note: this report will default with the **Don't Show Products That Have Never Been Sold And Have No Stock Level** boxed checked.

If you are planning on using the **Bulk Inventory Adjust** tool, you will be able to **Export** this **Inventory List** by clicking the **export (also used as a template for bulk adjust tool)** option.

MAYWEATHER BOXING+FITNESS

Inventory Change Log

Reports > Products > Inventory Change Log

This report shows all inventory changes that are not sales, such as manual adjustments and received orders.

Inventory Change Log - CRTraining Membership Site (2829)
10/1/2019 - 10/31/2019
Note: Wholesale price must be set up for impact to be calculated

Product Id	Product Variation Id	Product Name	Adjustment Date	Adjustment By	Change Type	Description	Amount	Impact
101757		$20 Club Credit	10/17/2019	Charlie Clubowner	Manual Increase (Bulk Upload Adjustment)	Bulk Inv Adjust : Current 90 / Set To 100	10	$0.00
101760	26122	12oz Water: Cherry 12oz Water	10/17/2019	Charlie Clubowner	Manual Decrease (Bulk Upload Adjustment)	Bulk Inv Adjust : Current 184 / Decrease By 5	-5	$0.00
121835		$25 Gift Card	10/17/2019	Charlie Clubowner	Manual Increase (Bulk Upload Adjustment)	Bulk Inv Adjust : Current 100 / Increase By 10	10	$10.00
308954		Leggings	10/17/2019	Charlie Clubowner	Received Inventory Increase		10	$10.00
431952	88527	Hand Towels: Black	10/24/2019	Charlie Clubowner	Manual Increase		10	$20.00
431952	88528	Hand Towels: Blue	10/24/2019	Charlie Clubowner	Manual Increase		30	$60.00

Choose the date range you want to view from the calendar or select a preset date range. From the drop down menu you can choose to; **Show All Changes, Only Manual Inventory INCREASE Corrections, Only Manual Inventory DECREASE corrections** or **Only Damaged Goods inventory DECREASES.**

The report will display: **Product Name, Adjustment Date, Adjustment By, Change Type, Description, Amount,** and **Impact.**

Key Reports

Learn > Knowledge

Gross Sales Detail:

https://www.clubready.com/wiki/WK2721823106

Draft Report:

https://www.clubready.com/wiki/WK27775508099

Agreements Log:

https://www.clubready.com/wiki/WK28245089888

Referral Report:

https://www.clubready.com/wiki/WK27101056417

Class Attendance:

https://www.clubready.com/wiki/WK30776941942

Key Reports

Learn > Knowledge

Past Dues:

https://www.clubready.com/wiki/WK27193779972

Declined Charges Log:

https://www.clubready.com/wiki/WK27253986692

Session Payroll:

https://www.clubready.com/wiki/WK26007606628

Time Clock Payroll:

https://www.clubready.com/wiki/WK25972245282

Members By Package:

https://www.clubready.com/wiki/WK27237541796

Key Reports

Learn > Knowledge

Bulk Email History:

https://www.clubready.com/wiki/WK30365127615

Lost Members:

https://www.clubready.com/wiki/WK27138016177

Lost Sheep:

https://www.clubready.com/wiki/WK300946265

Invoices Coming Due:

https://www.clubready.com/wiki/WK27731039034

Remit Report:

https://www.clubready.com/wiki/WK25882113028

CRUniversity

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.

Enter the code: **FoundationsMember**

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.

MAYWEATHER BOXING + FITNESS

Training: Recorded Training Sessions

Learn > Training

You can play these recorded sessions at your convenience for extra learning anytime! To locate additional recorded training sessions, go to **Learn > Knowledge >** and enter the word **webinar** in your search. This will populate any of our pre-recorded sessions.

Video - Communications:
https://www.clubready.com/wiki/WK26995751820

Video - Managing An Agreement:
https://www.clubready.com/wiki/WK31035704214

Video - Reports: Intelligence, Sales And Misc Reports:
https://www.clubready.com/wiki/WK31016141186

Video - Employee Time Clock:
https://www.clubready.com/wiki/WK31458733558

Video - Managing Tasks And Using Work It Recorded Webinar:
https://www.clubready.com/wiki/WK27972088386

MAYWEATHER BOXING+FITNESS

Training: ClubReady Foundations Webinar

Learn > Training

Wednesday, October 3, 2018

10:00 AM EST

All Club Staff | Experience level: Everybody

ClubReady Foundations for Staff Members (90 mins) Atena Martin **view details**

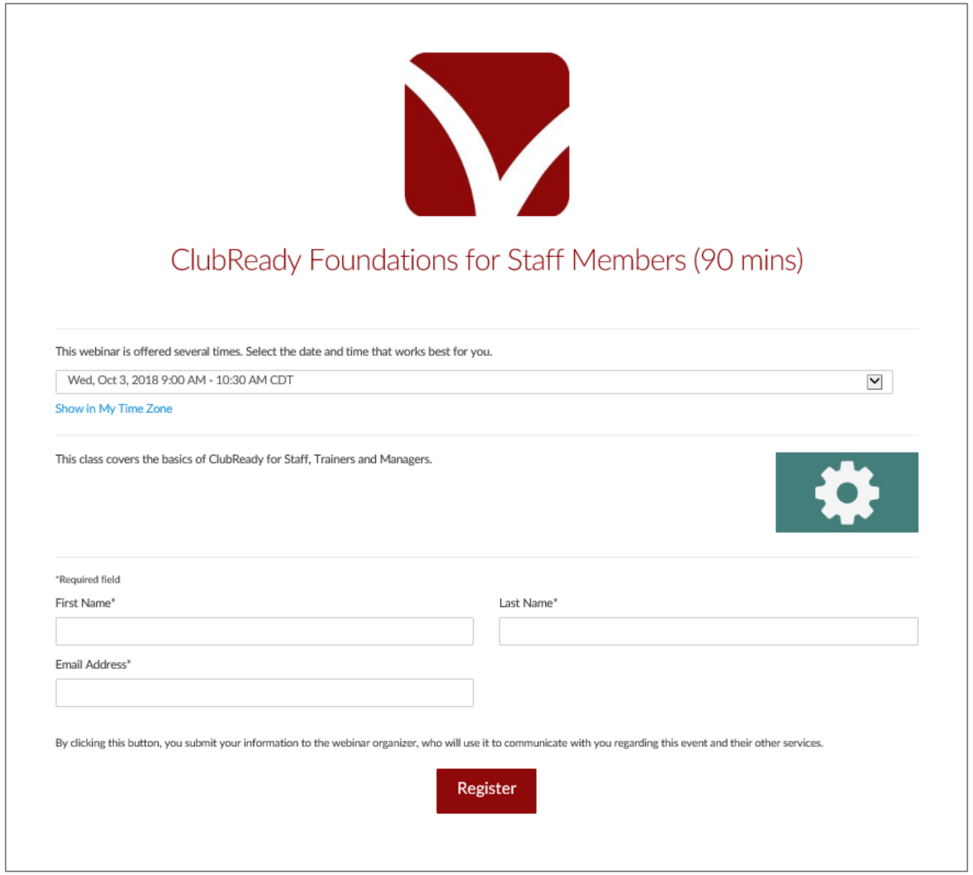
For the first 60 min, this class covers the basics of ClubReady for Staff, Trainers and Manager. Afterwards, there will be an open Q&A regarding any questions pertaining to the webinar.

maximum attendees	99
webinar URL	https://attendee.gotowebinar.com/rt/7367516649021485569
dial-in number	
access code	
Key Learning 1	Basics
Key Learning 2	Manager Functions
Key Learning 3	Trainer Functions

MAYWEATHER
BOXING+FITNESS

Training: ClubReady Foundations Webinar

Learn > Training


ClubReady Foundations for Staff Members (90 mins)

This webinar is offered several times. Select the date and time that works best for you.

Wed, Oct 3, 2018 9:00 AM - 10:30 AM CDT

Show in My Time Zone

This class covers the basics of ClubReady for Staff, Trainers and Managers.

*Required field

First Name*

Last Name*

Email Address*

By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

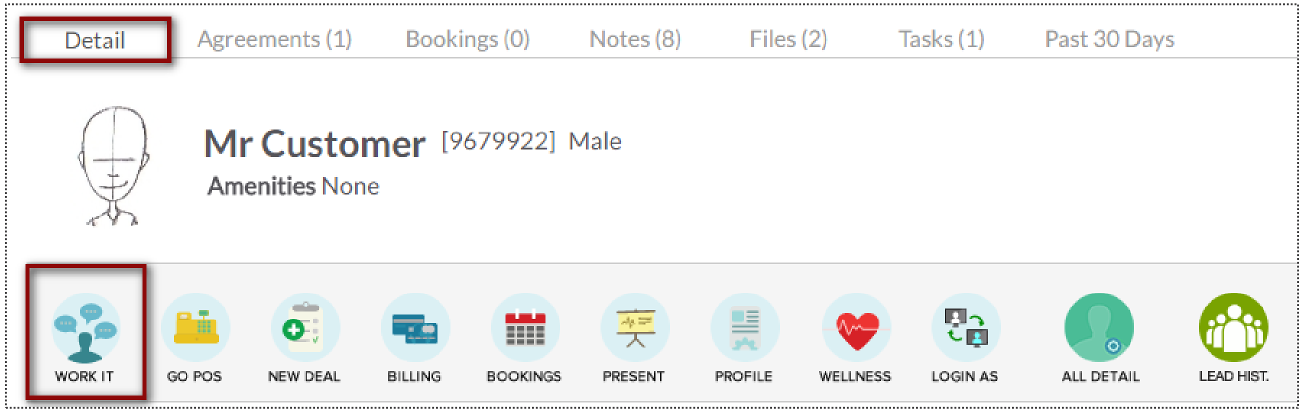
Register

Complete the registration information and you will receive an email confirmation you have been registered to attend.

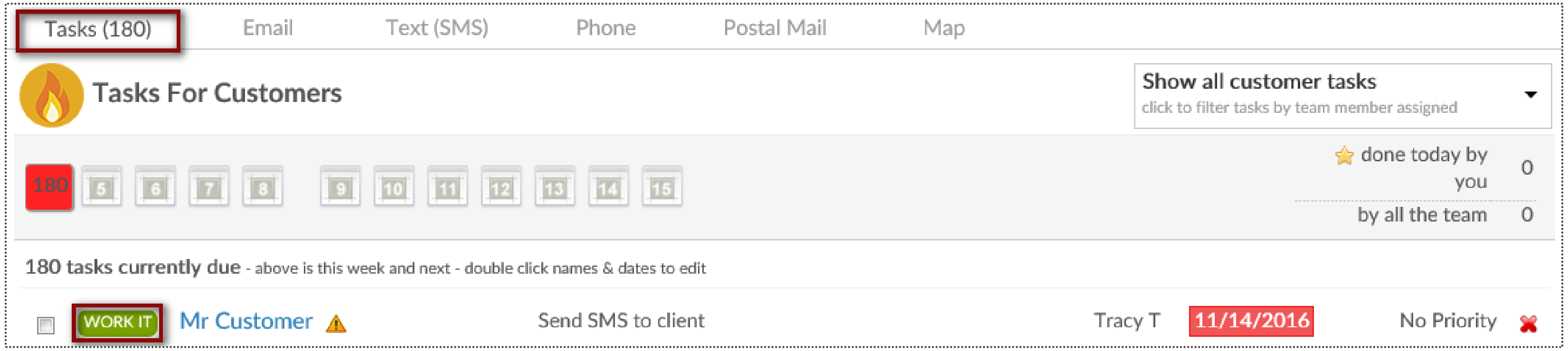
Working Tasks

Access the Work It

Prospects/Members tab > Tasks

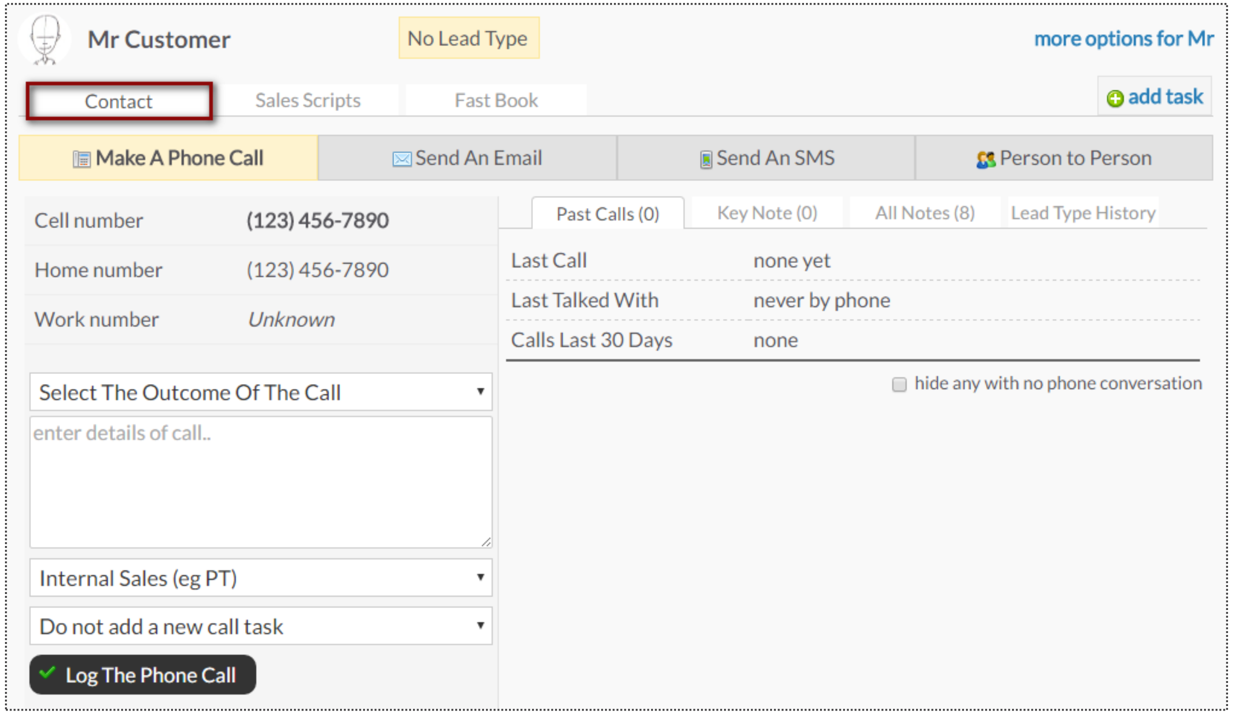


OR



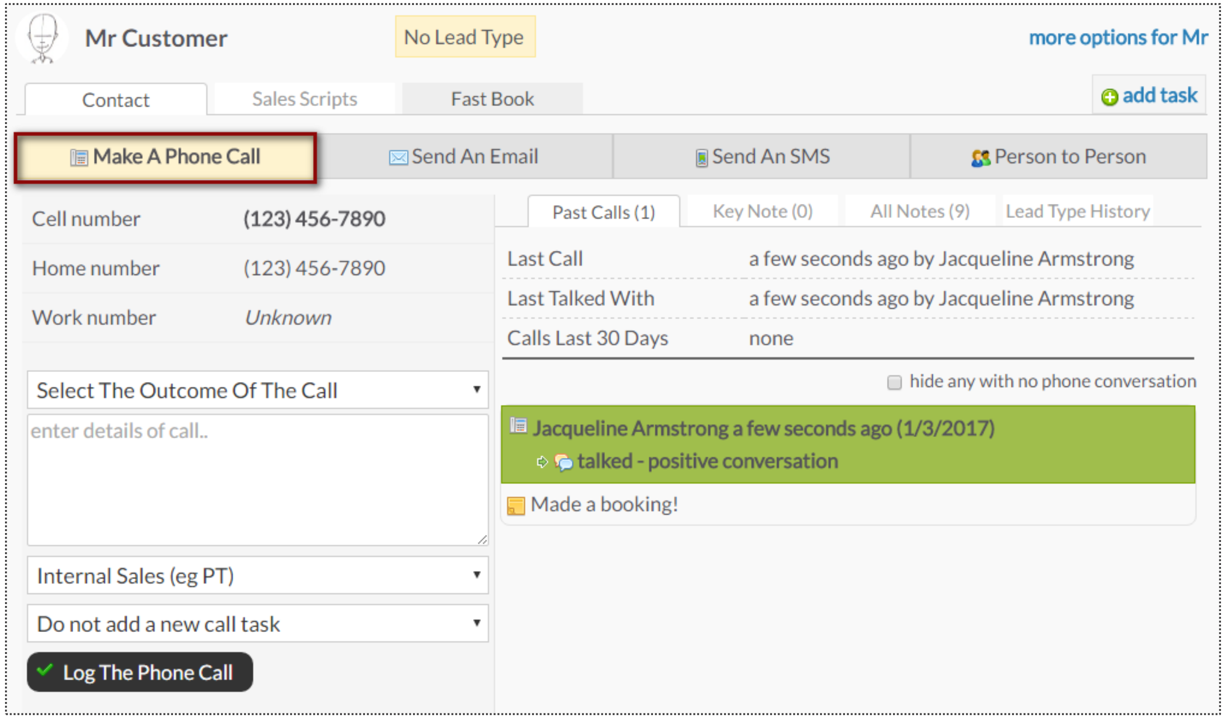
MAYWEATHER
BOXING+FITNESS

Work It – Contact



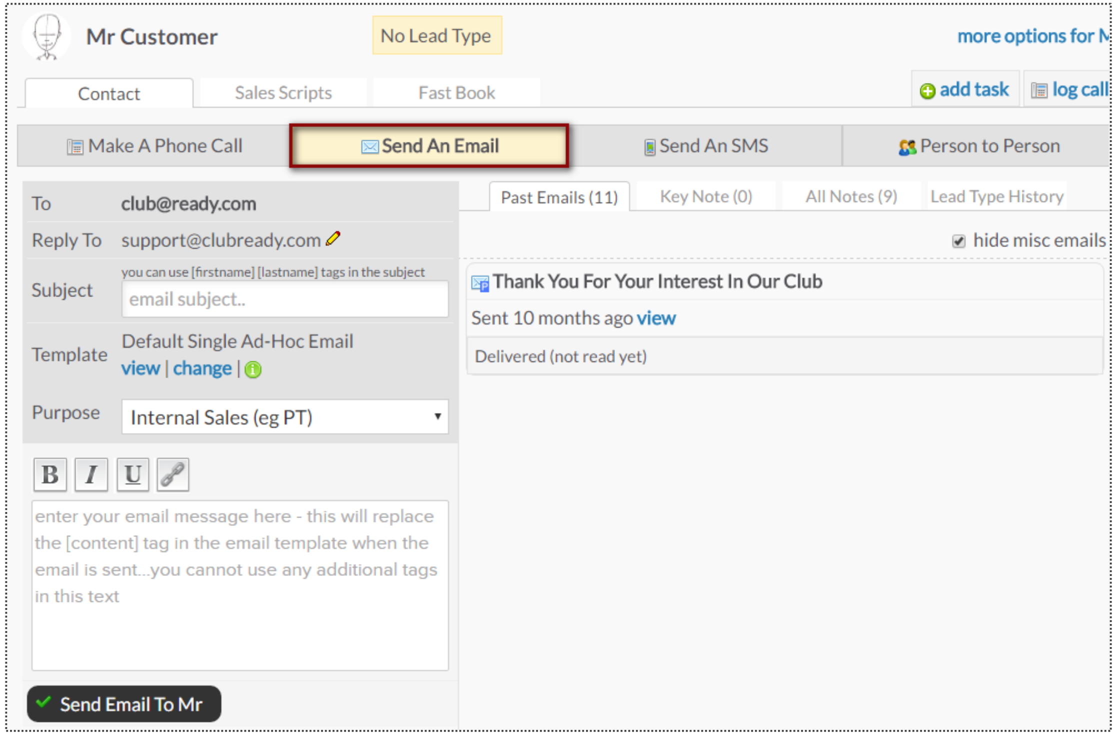
The **Contact** tab provides different contact methods that can be taken for your Prospects and Members. The options include logging phone calls, sending an email, sending an SMS (text) message, and logging person to person contact.

Work It – Phone Calls



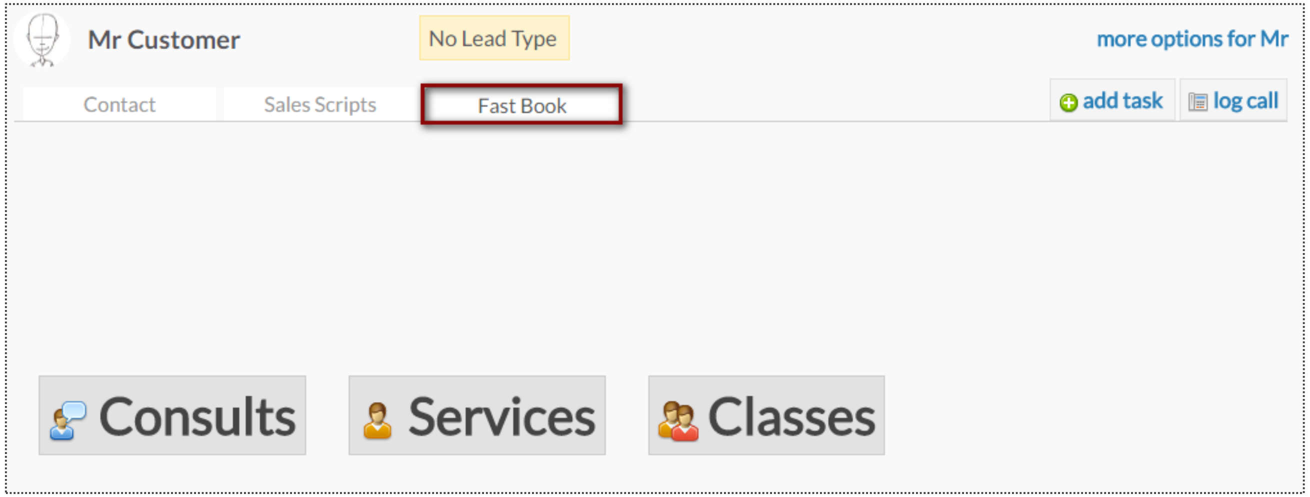
The **Make A Phone Call** tab will show the client's contact numbers, last call information, and a chronological history of the calls.

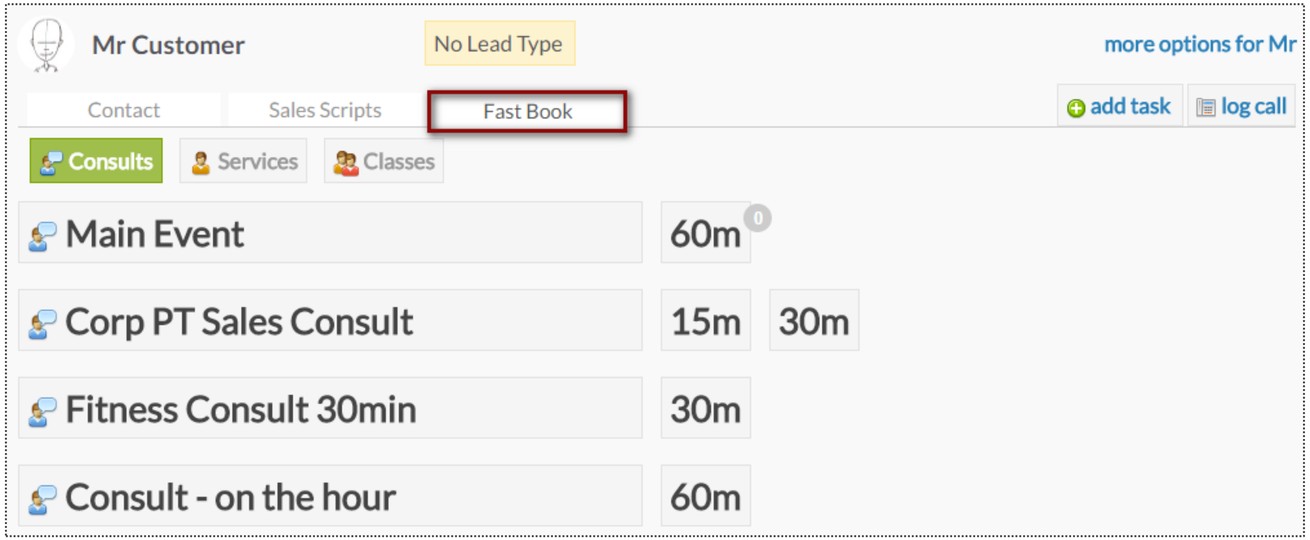
Work It – Emails



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 – Fast Book

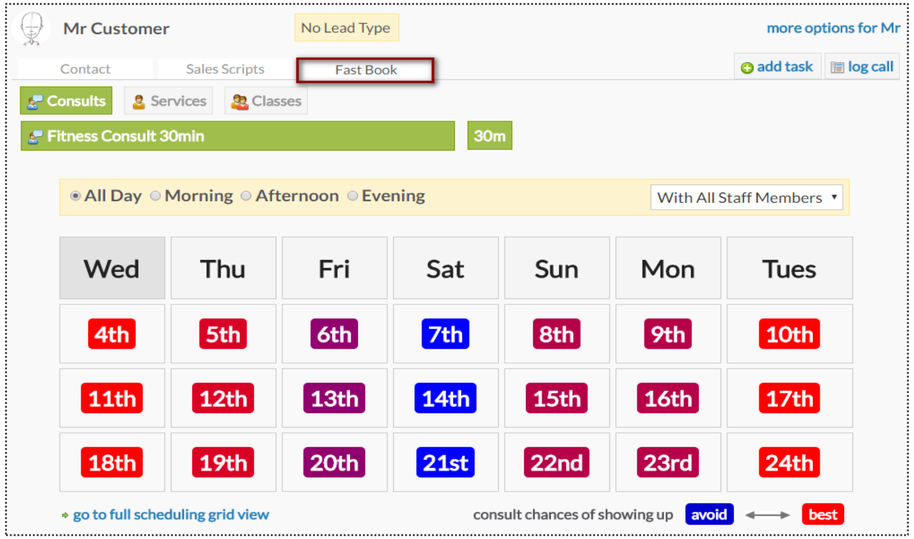


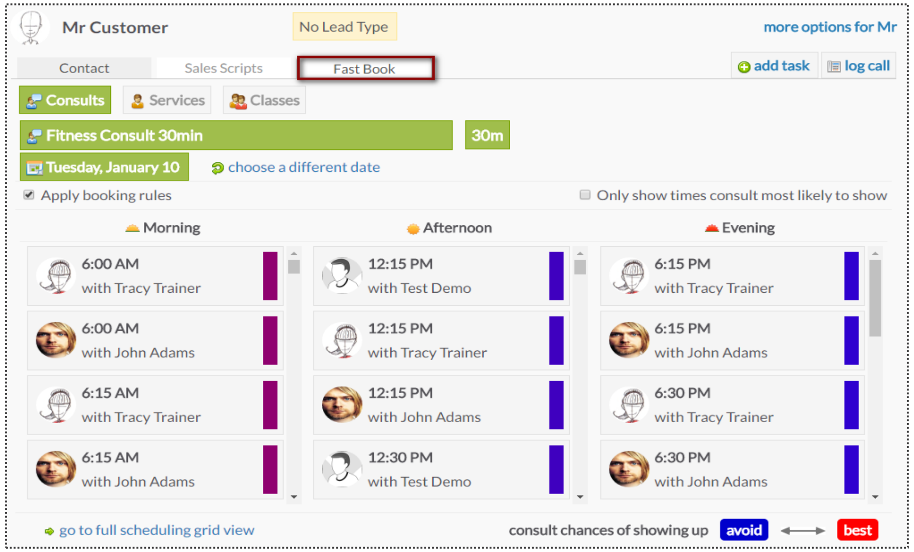


The **Fast Book** tab allows you a fast and easy way to book your client into **Consults**, **Services** or **Classes.** Simply select the type of service you wish to book as well as the duration.

MAYWEATHER BOXING+FITNESS

Work It – Fast Book



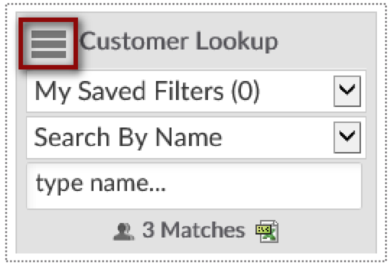


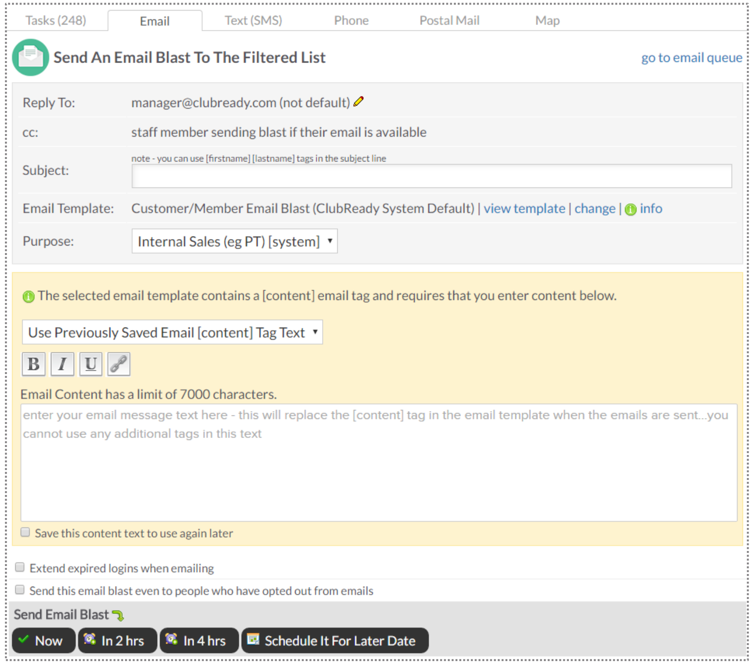
Once you've selected the type of service, you can then select the client's preference for a morning, afternoon or evening appointment, as well as the trainer.

MAYWEATHER BOXING+FITNESS

Email Blasts

Prospects/Members > Email





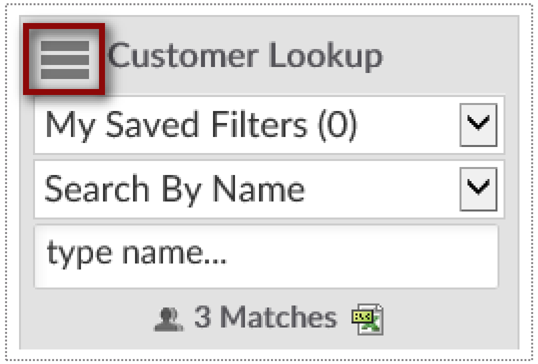
Your email blast will attempt to send to all of the prospects/members that are showing in the lookup list at the time you send your blast, so filtering will allow you to email a target audience. To start narrowing who will receive an email blast, click on the 3 bars. This will provide you with options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

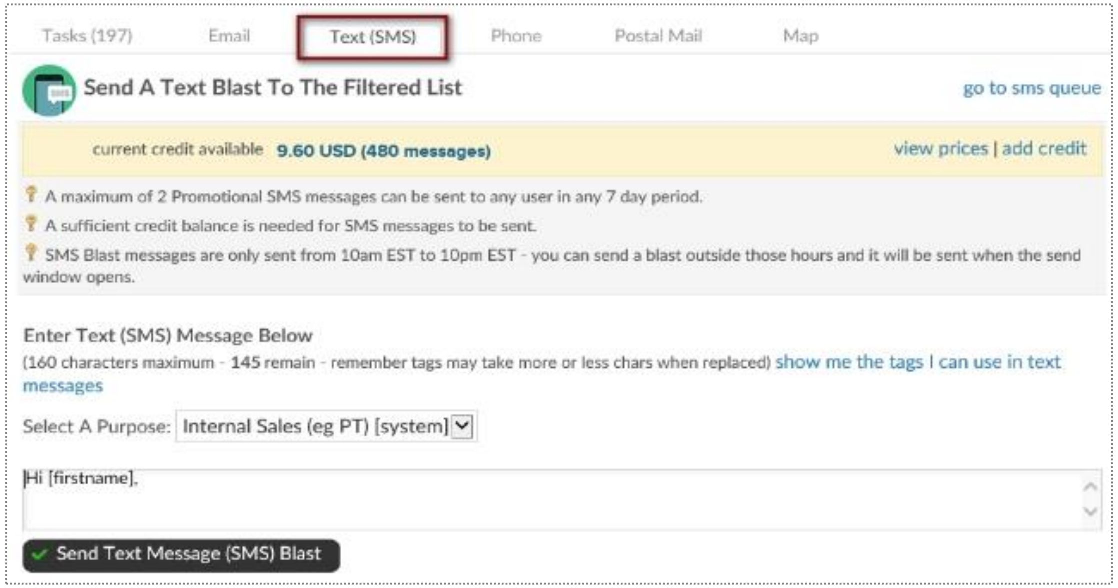
Select, or fill in, the following fields: **Reply To**, **Subject**, **Email Template, Use Previously Saved Email** (If you have saved any email content previously you can select this saved text from the drop-down box).

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 Blast

Prospects/Members > Text (SMS)





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

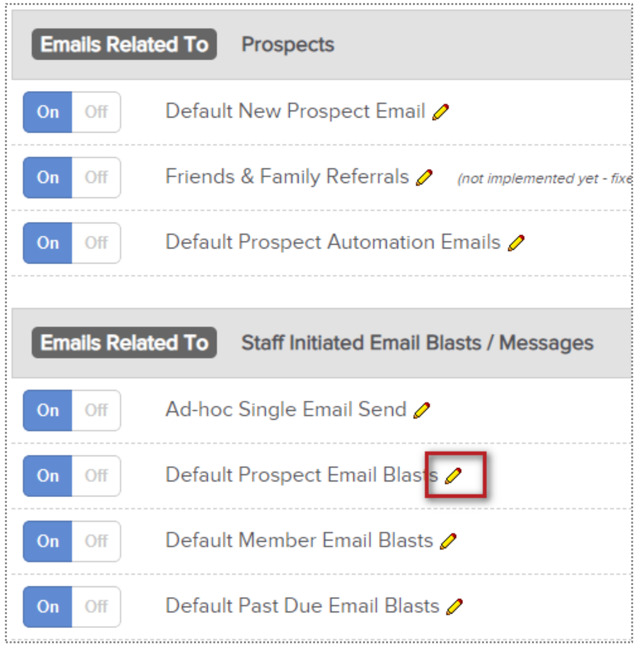
The screen will display the current amount of credit available and allow you to view prices and add credit.

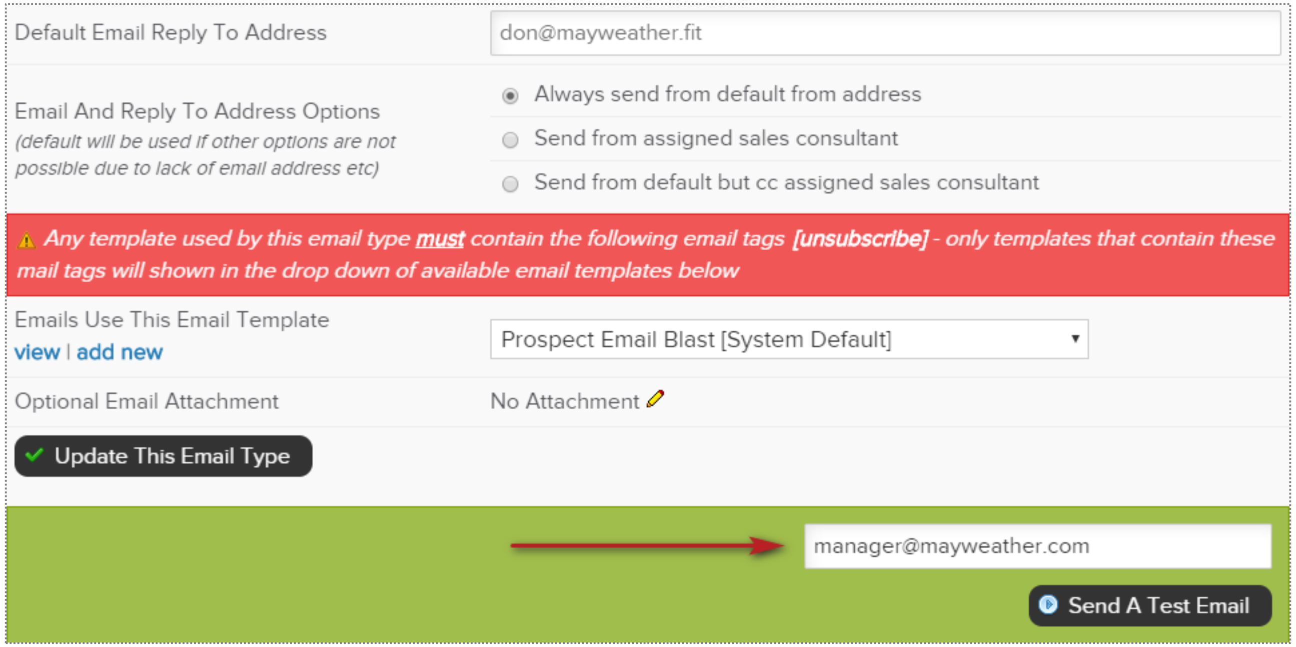
The last section is where you will actually compose the message. Click the button **Send Text Message (SMS) Blast** to start the send process.

MAYWEATHER BOXING+FITNESS

Automated Emails

Setup > Communications > System Emails





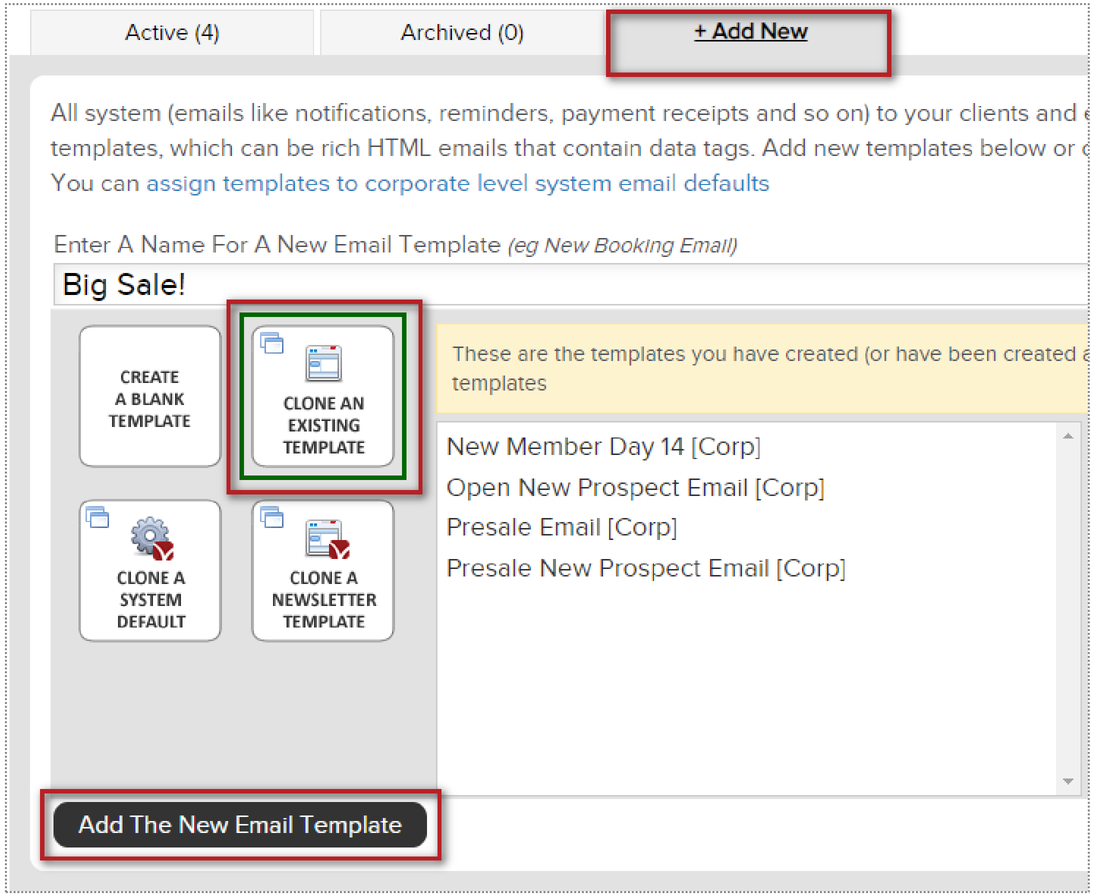
System emails are the type of emails that ClubReady sends (mostly automatically) as part of the day to day operation of a club.

Click on the **edit pencil** next to the System Email to manage the settings such as **Email Template** that will be sent out, **Email Attachments** and send yourself a **test email** prior to sending to your customers.

MAYWEATHER BOXING+FITNESS

Email Templates

Setup > Communications > Email Templates



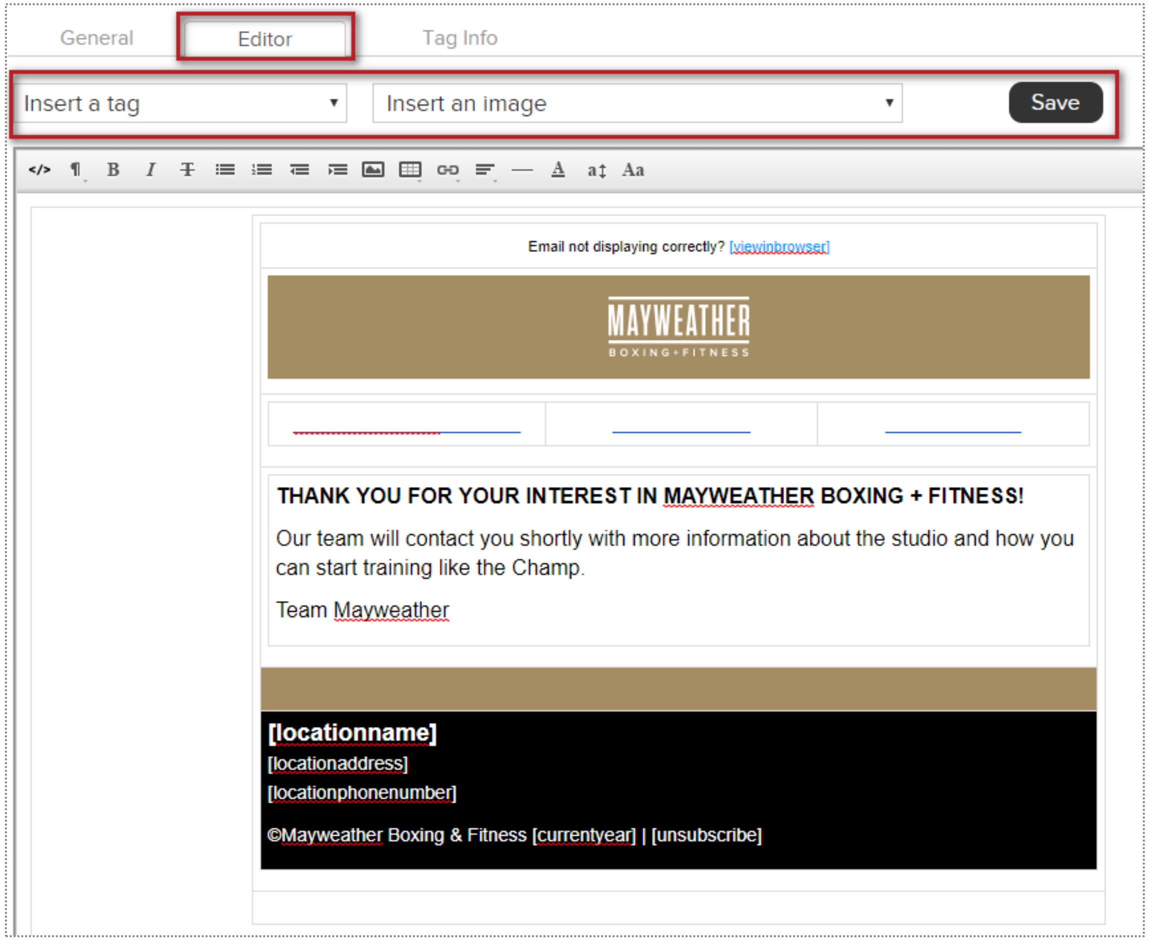
Click on the **+ Add New** tab to choose from the 4 ways to create a custom template:
Create a blank template, Cloning an existing template, Cloning system default template or
Clone a newsletter template

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

MAYWEATHER BOXING+FITNESS

Email Templates

Setup > Communications > Email Templates



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

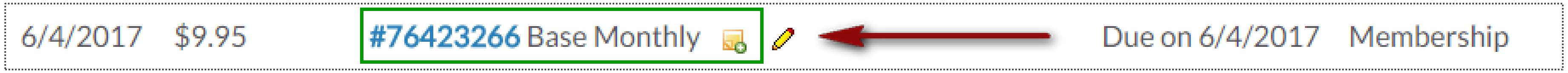
Choose from **Inserting a Tag** or **Inserting an image** to display for your users.

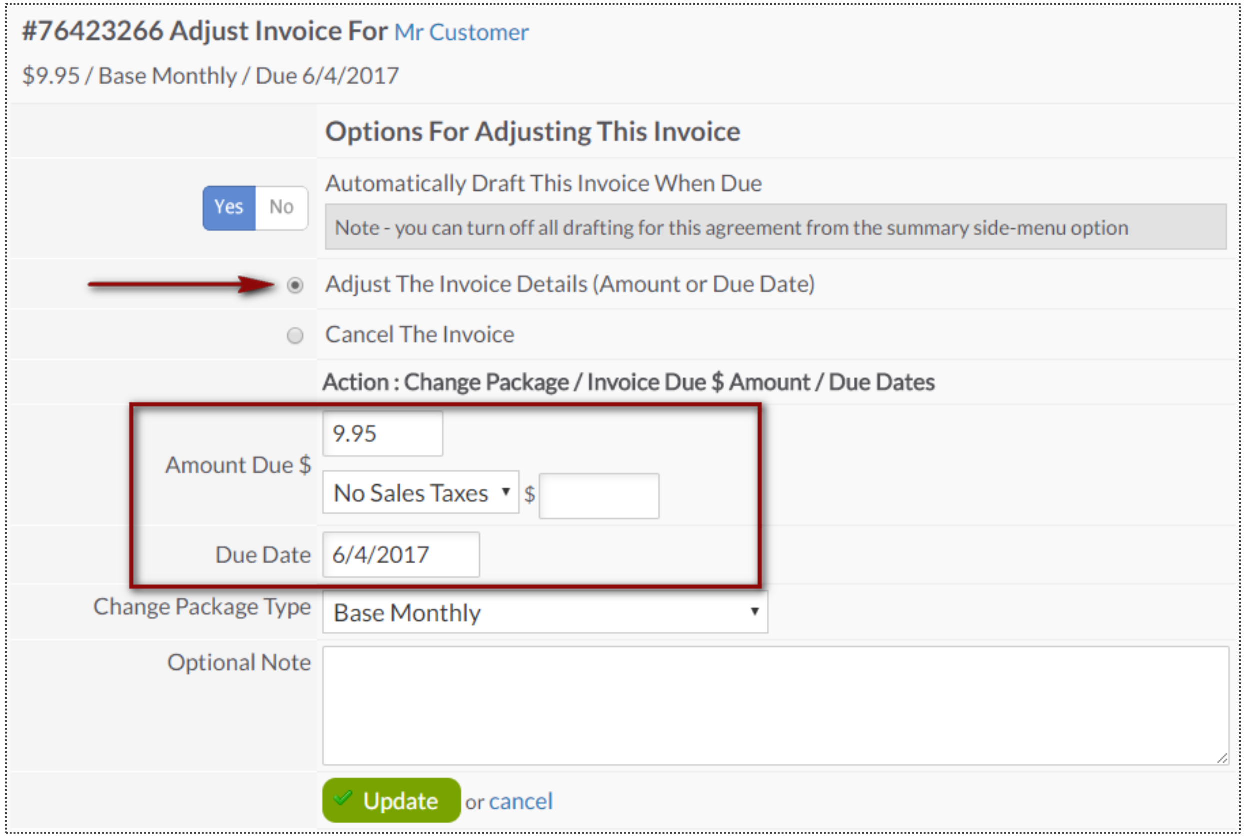
NOTE:
- Avoid using copy + paste from Microsoft Word.

MAYWEATHER BOXING+FITNESS

Invoice Adjustments

Member > Billing > Invoices > Edit Pencil



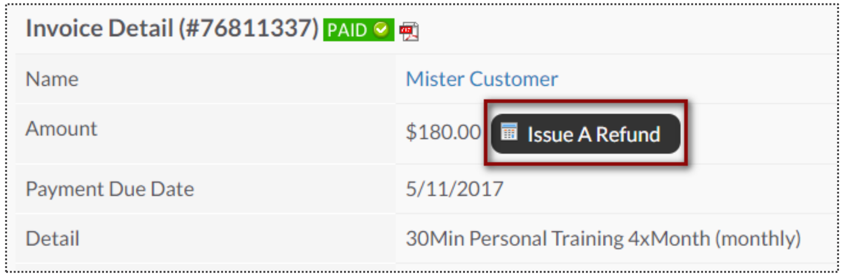


Selecting the option **Adjust The Invoice Details** will update the screen to display all options you can adjust for this one invoice. Make the desired changes to the invoice. Click the **Update** button to save changes.

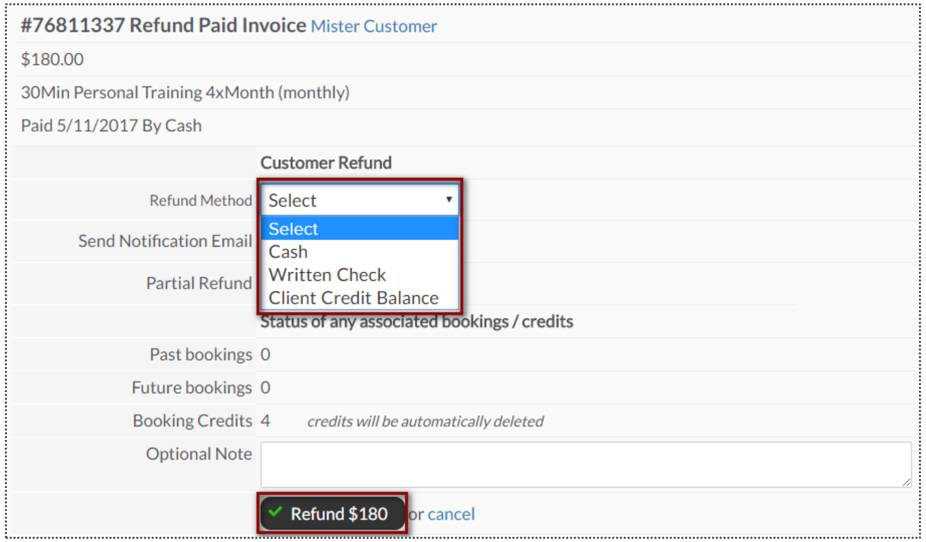
MAYWEATHER BOXING+FITNESS

Refund an Invoice

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



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

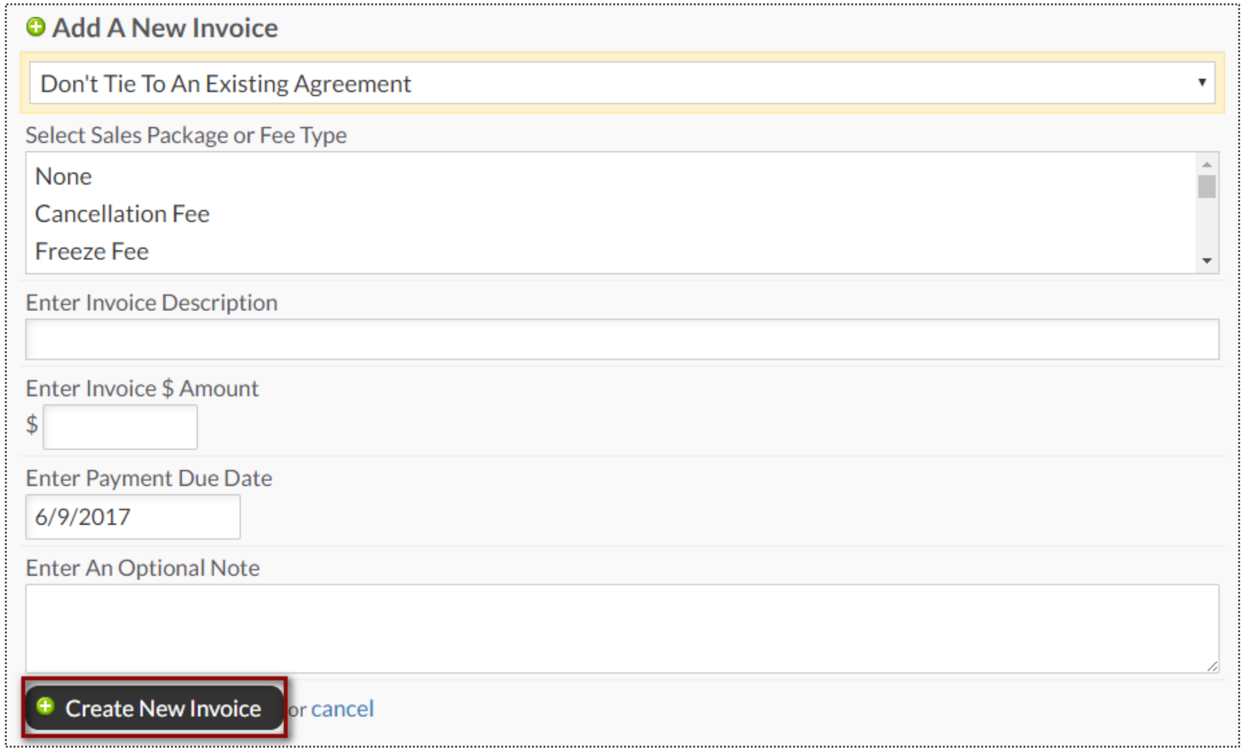


From this detail screen, select the desired form of payment to be refunded back to the member. Options will be **CC/Bank ACH on file, Written Check, Cash, or Client Credit Balance**. You may also choose to send an email notification or leave a note.

To finalize, click the **Refund** button.

Adding a New Invoice

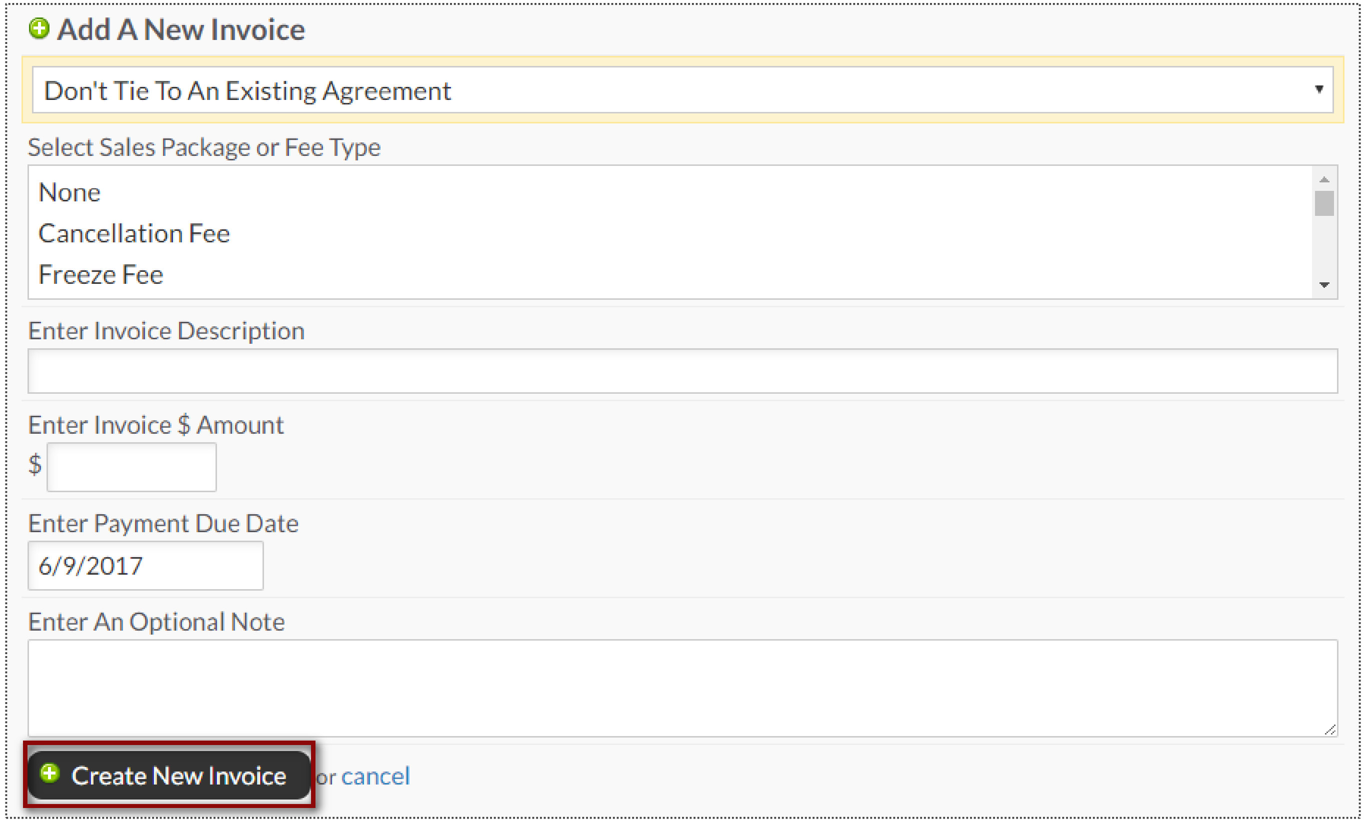
Member > Billing > Invoices > Add A New Invoice



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**

Adding a New Invoice

Member > Billing > Invoices > Add A New Invoice

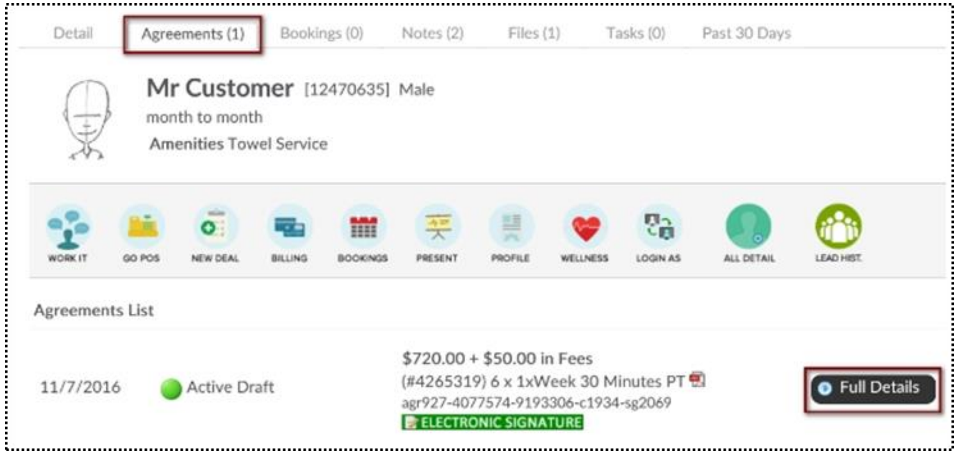


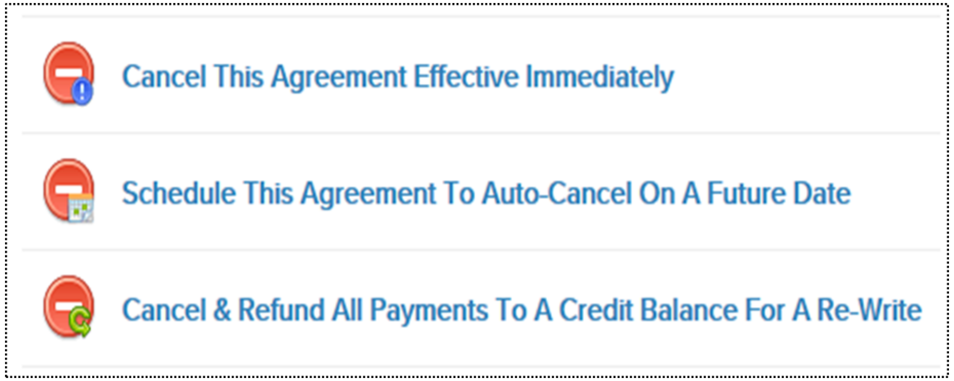
You have the option from here to **Tie to An Agreement, Select A Sales Package or Fee Type, Invoice Description, Invoice Amount, Payment Due Date and an Optional Note.** To finalize, click **Create New Invoice**

MAYWEATHER BOXING+FITNESS

Cancel an Agreement

Member Account > Agreements > Full Details > Cancel This Agreement





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

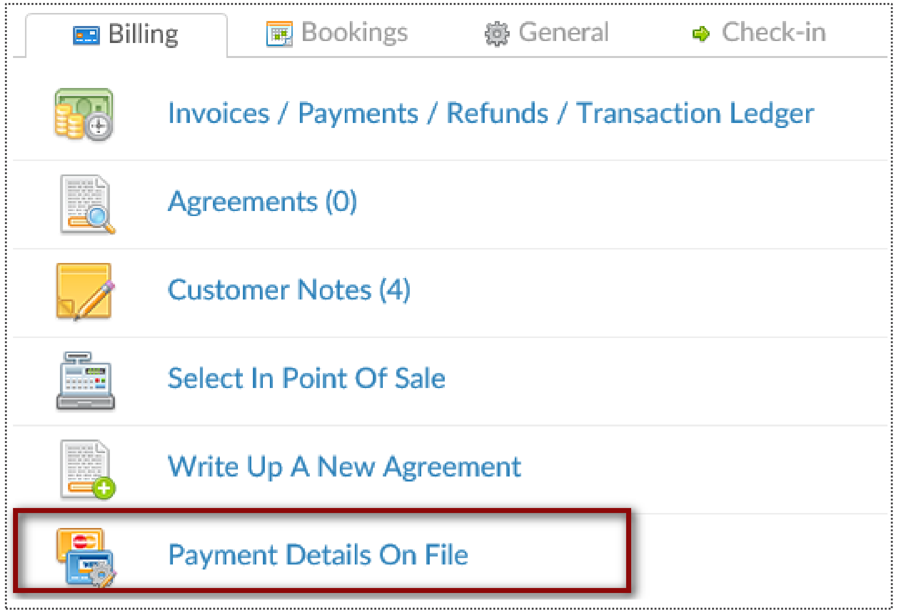
Schedule This Agreement To Auto-Cancel On A Future Date: This agreement will be auto-cancelled on a future date you select. The agreement will not change until that date.

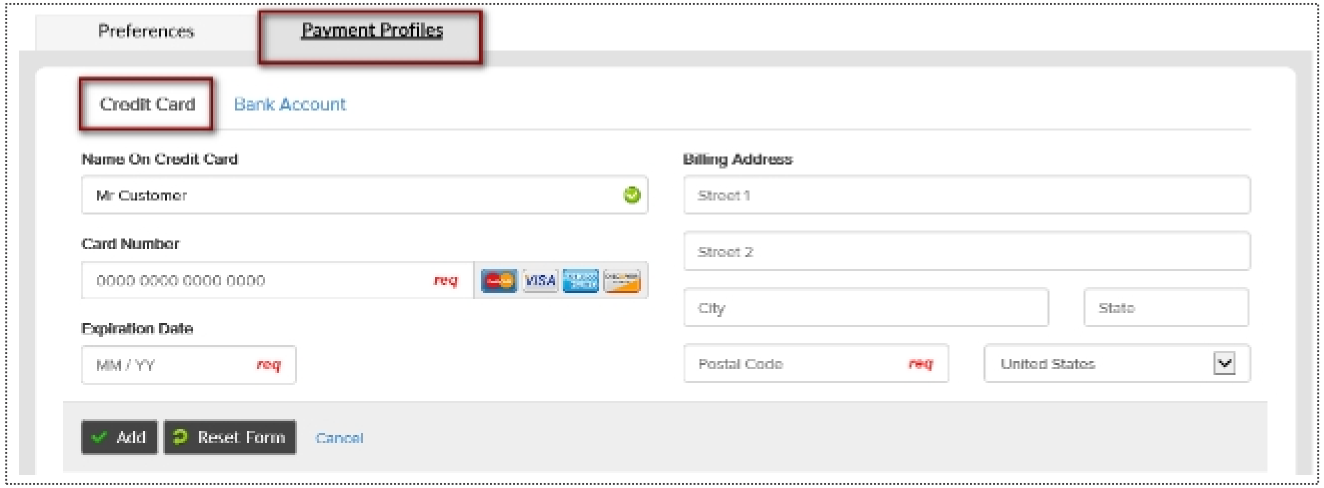
Cancel & Refund All Payments To A Credit Balance For A Re-Write: All paid invoices will be refunded to a customer as credit balance.

MAYWEATHER
BOXING+FITNESS

Add/Update Credit Card on File

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



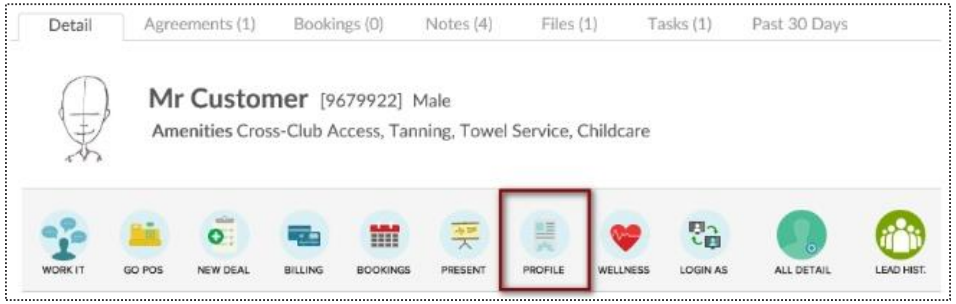


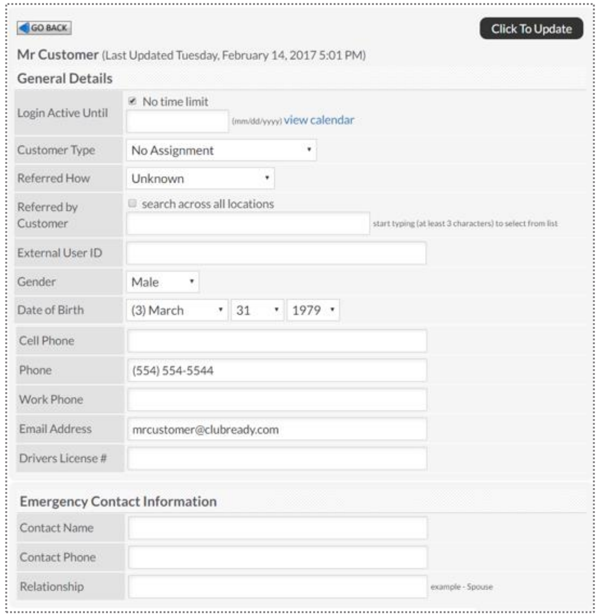
To add a new bank account select the **New Payment Profile** button. Click on **Bank Account** tab to enter the client's bank account information. Select the **Add** button to save the information.

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

Edit Member's Profile

Member Account > Profile



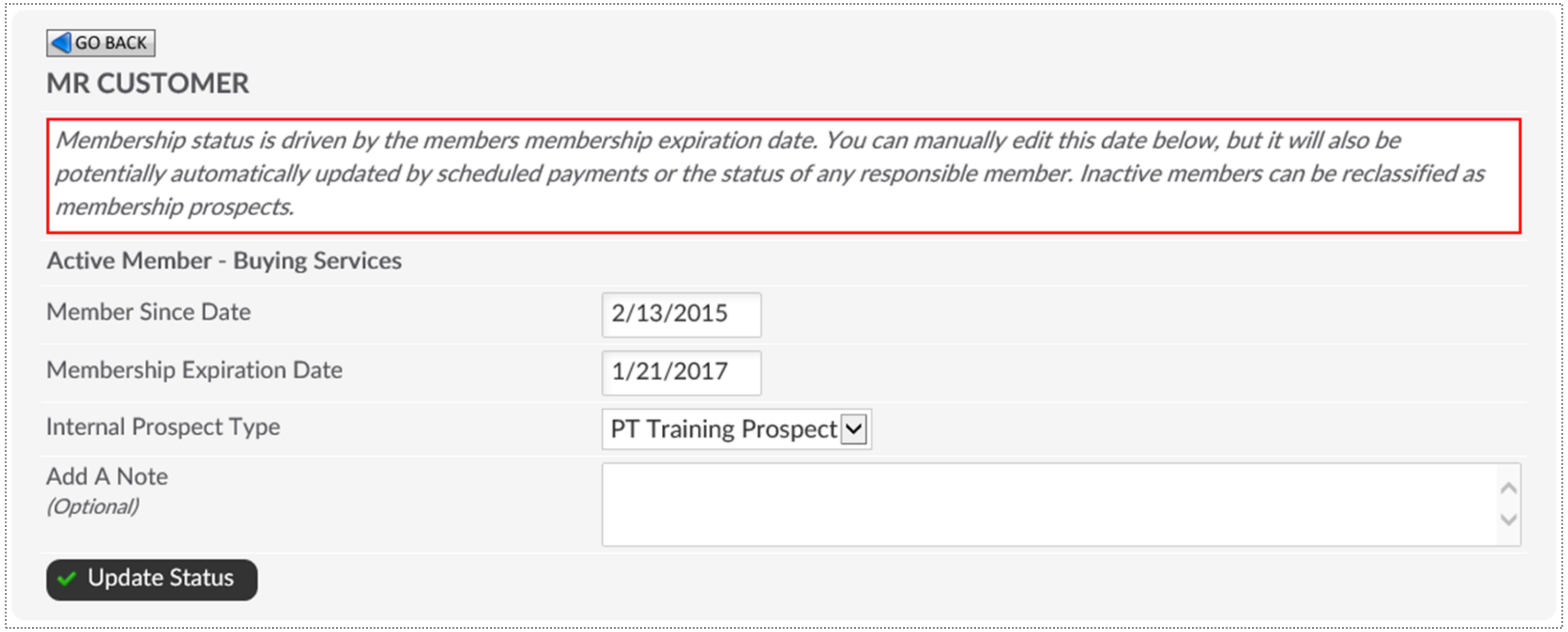


The options available to edit are **Member Type, Name, Address, Phone Numbers, Email, Emergency Contacts, Date of Birth**, etc. To save your changes, click the button **Click to Update**.

MAYWEATHER BOXING+FITNESS

Edit Membership Status

Member Account > All Detail > General > Edit Membership Status

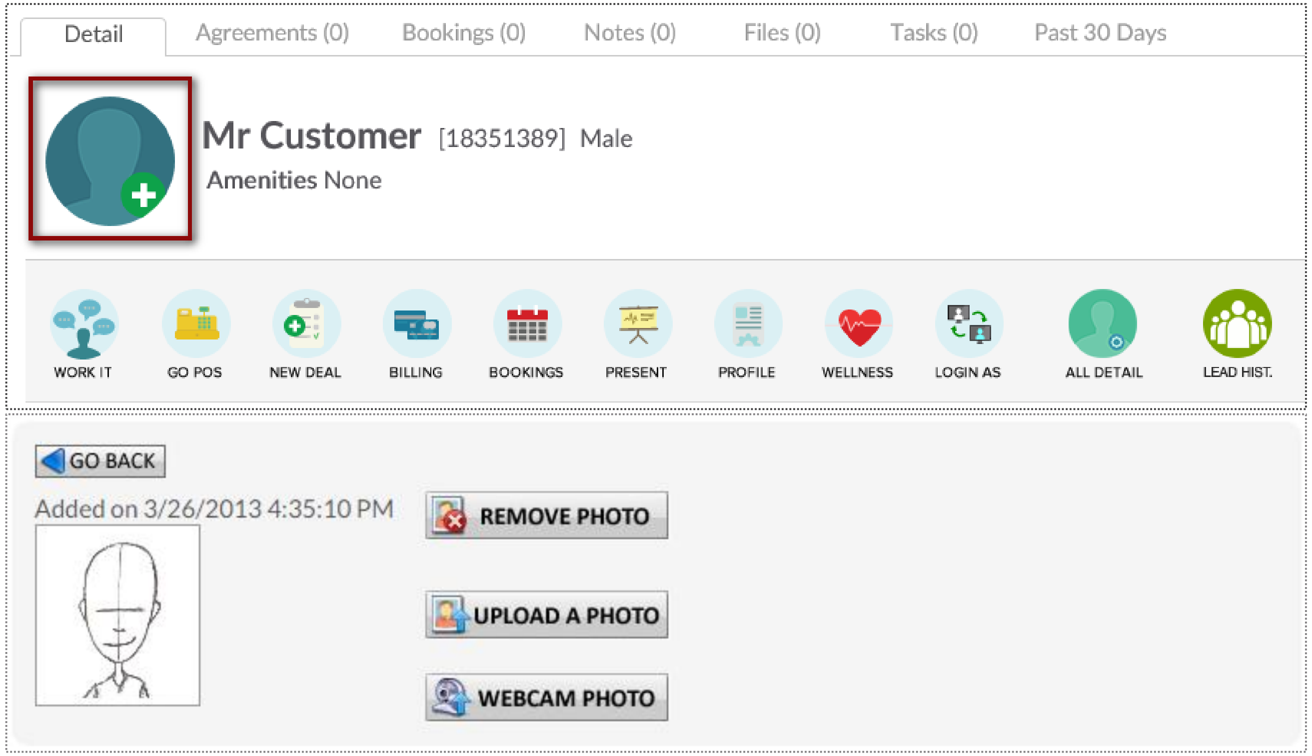


Member Since Date -This date is set by the member's original membership purchase date. You may alter manually here.
Membership Expiration Date -This date is based off of the member's membership package. You may manually adjust it here if needed.
Internal Prospect Type/Convert Back to Prospect -If they are a member, you may use this field to classify them as an Internal Prospect Type. If you set a member to an expired date, you can then re-classify them as a prospect type of your choosing here.
Add A Note - This allows you to create a note when making any adjustments to the membership status.

MAYWEATHER BOXING+FITNESS

Add a Photo

Prospects > Select Prospect Account > Green Plus Sign

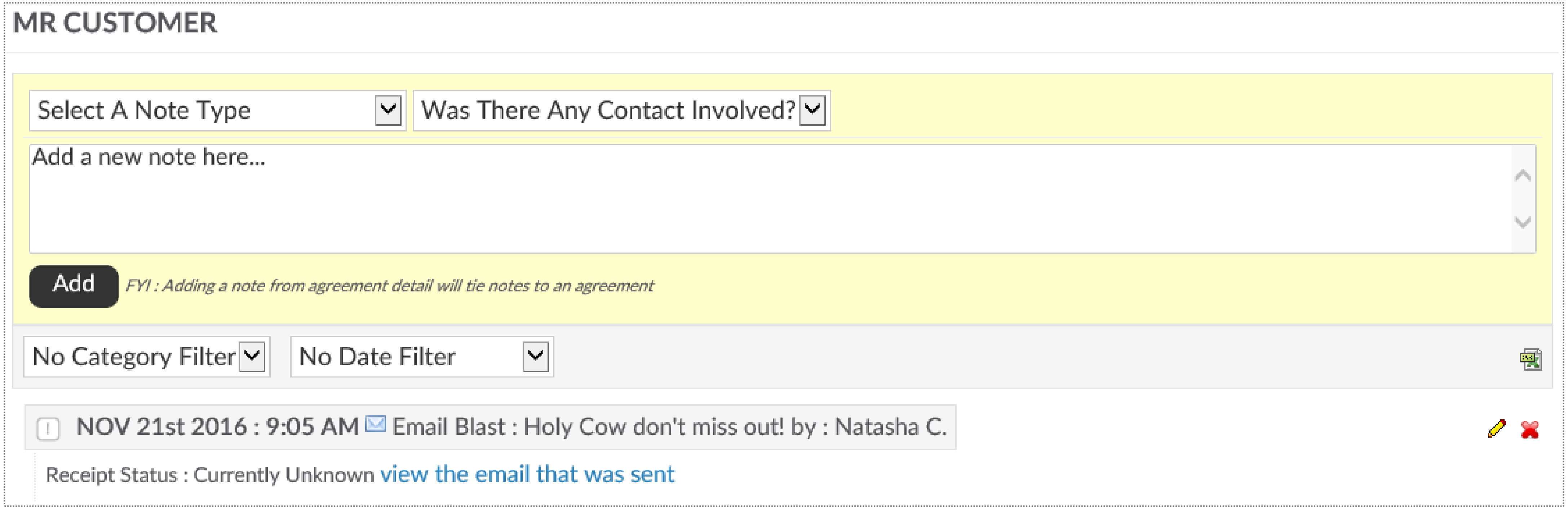


Click to **Upload A Photo** or **Webcam Photo** button and the photo will be successfully added to the client's profile.

MAYWEATHER BOXING+FITNESS

Member Notes

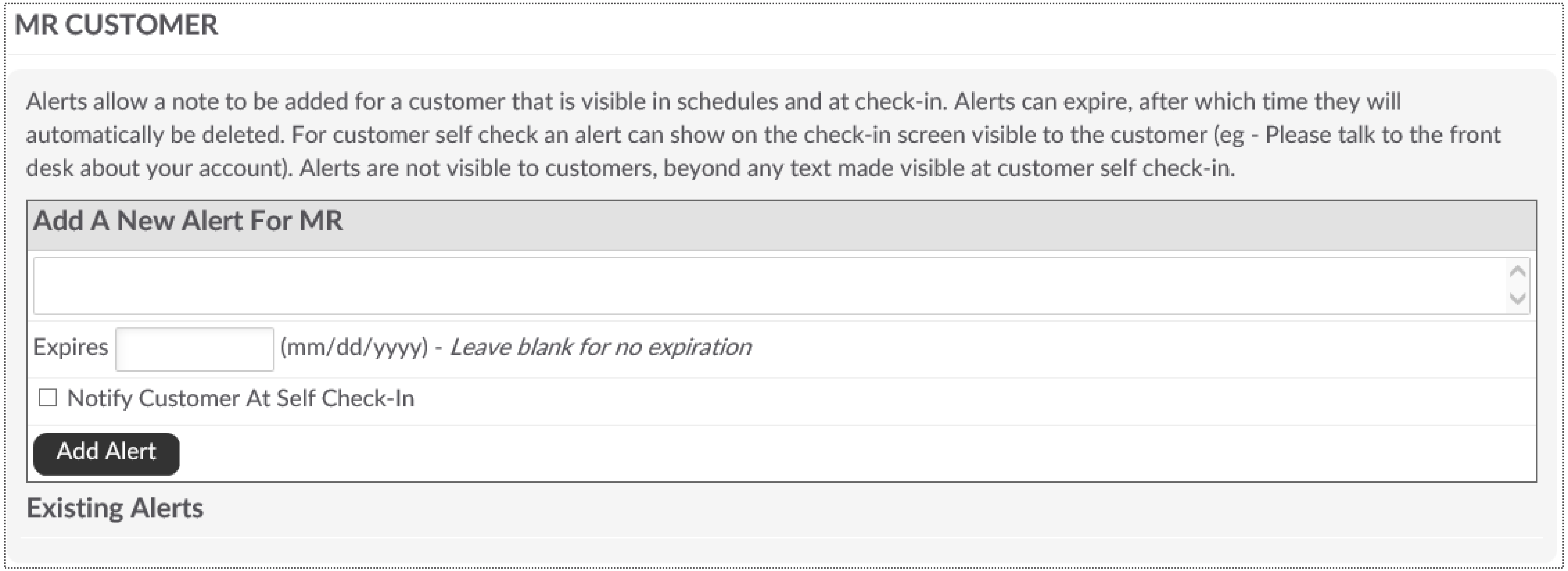
Member Account > All Detail > Member Notes



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



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)

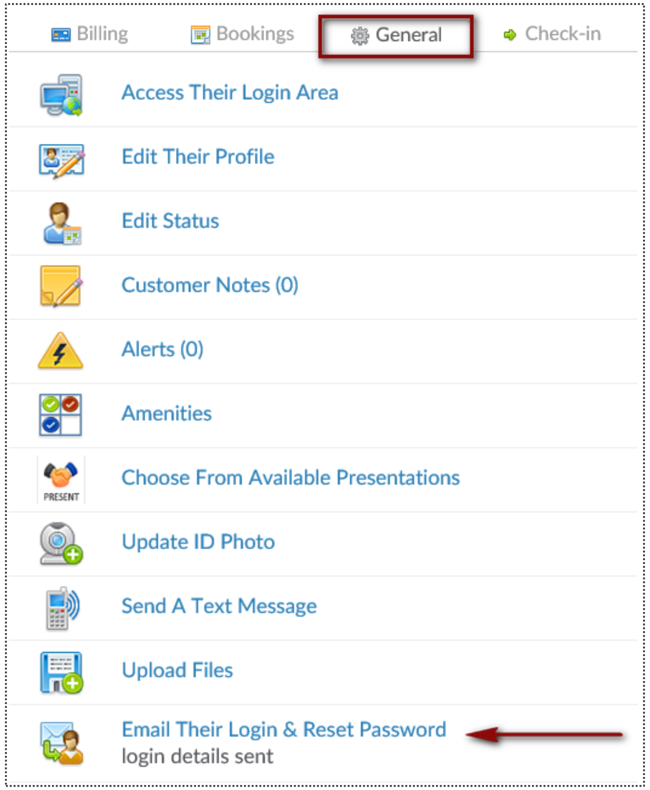
Add A New Alert field allows you to enter a new message for staff.

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.

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.

Email Login & Reset Password

Member Account > All Detail > General > Email Their Login & Reset Password



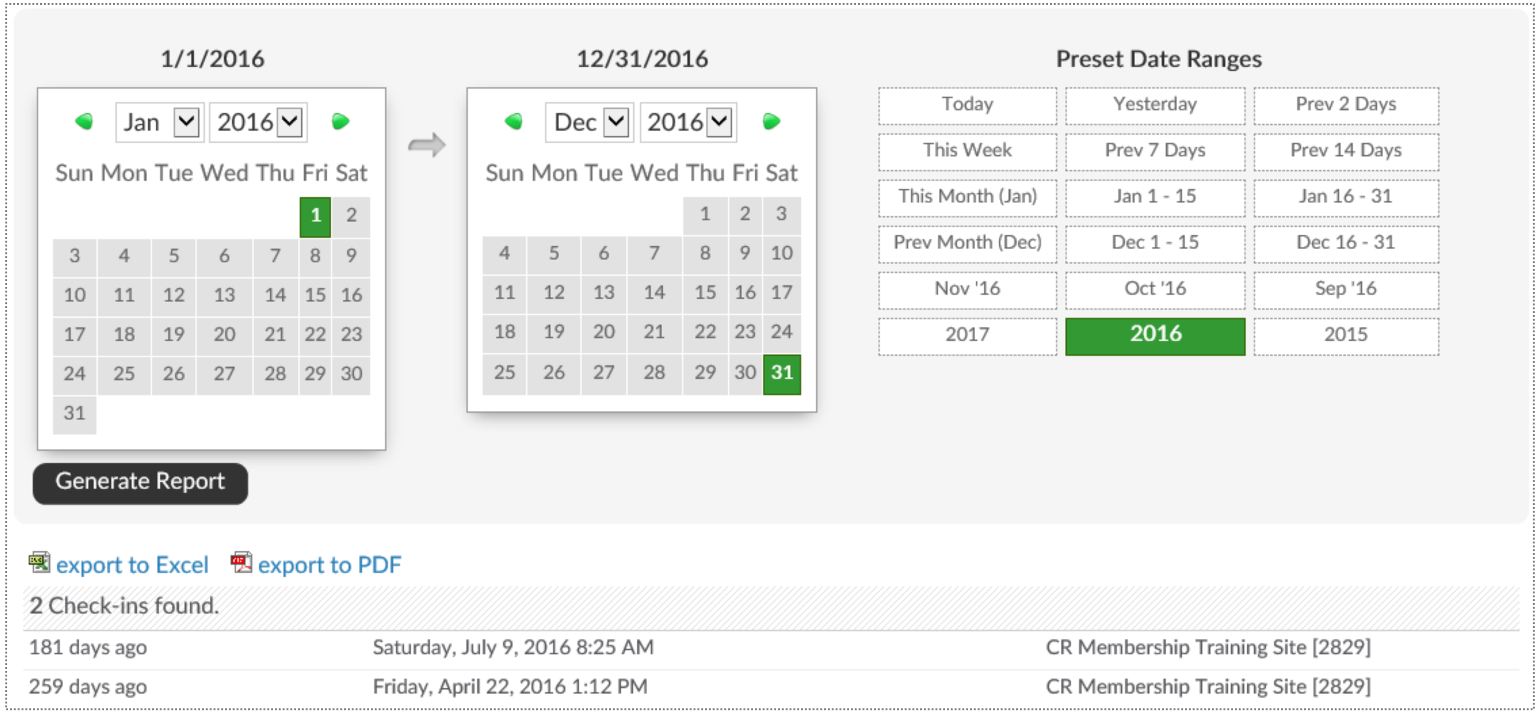
To access this screen click search and select the desired client. Verify the client has an email address, if not click the edit pencil to enter one. Click the **All Detail** button.

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

MAYWEATHER
BOXING+FITNESS

View Check-In History

Member Account > Attendance Card

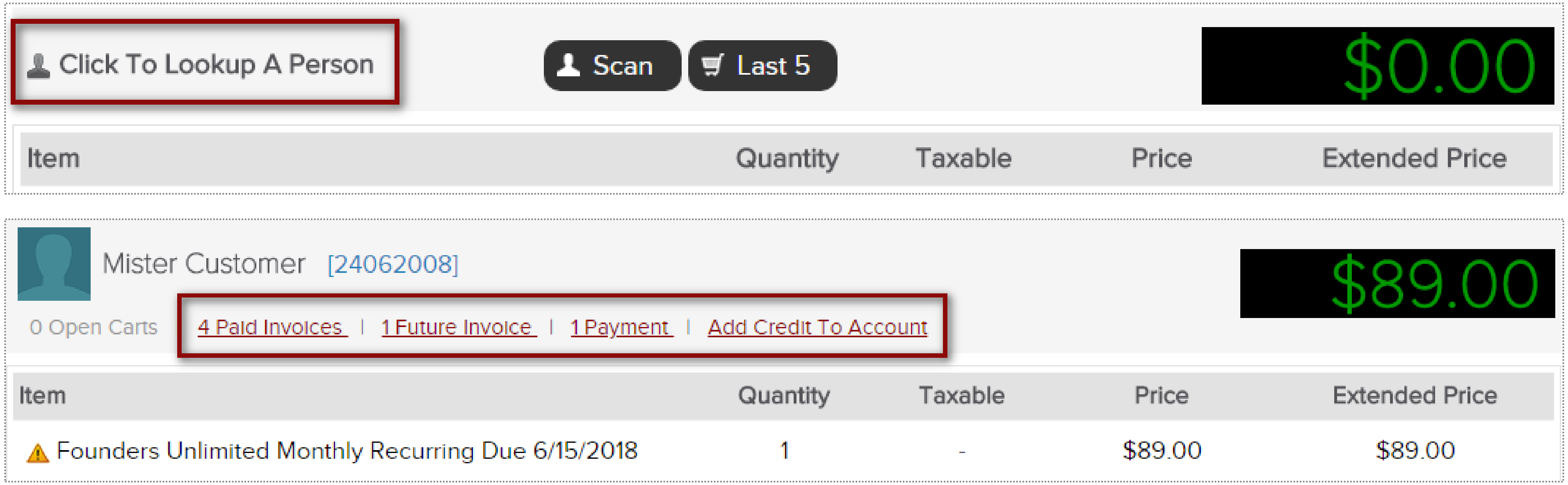


To generate this report, select the date range and click to **Generate Report.** The results will display on screen and show the number of check-ins, date of the check-ins, and the club location of the check-ins.

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.

Point of Sale

Main > POS

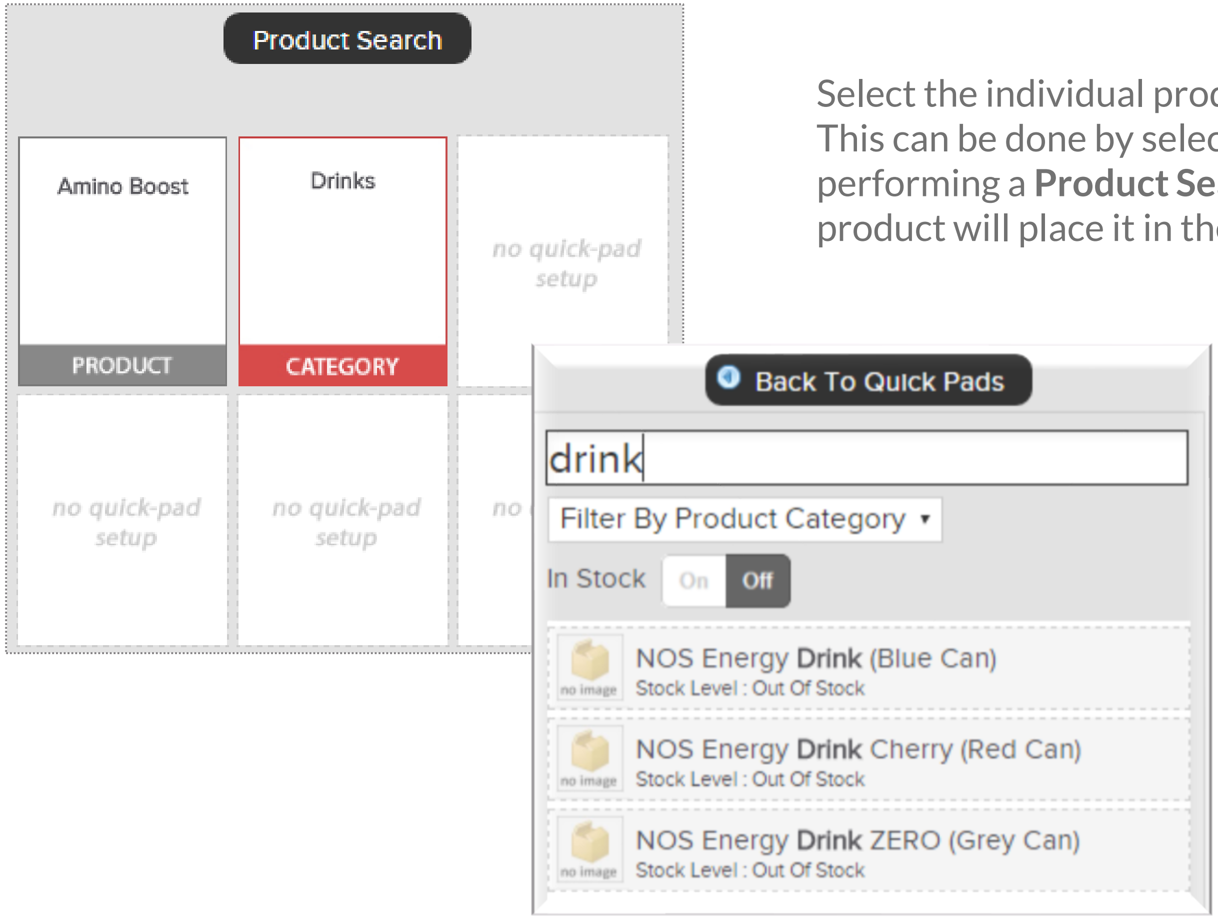


The POS is used for taking payment on past due and future invoices as well as for selling merchandise. To pull a client into the POS, select the **Click to Lookup a Person** button.

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

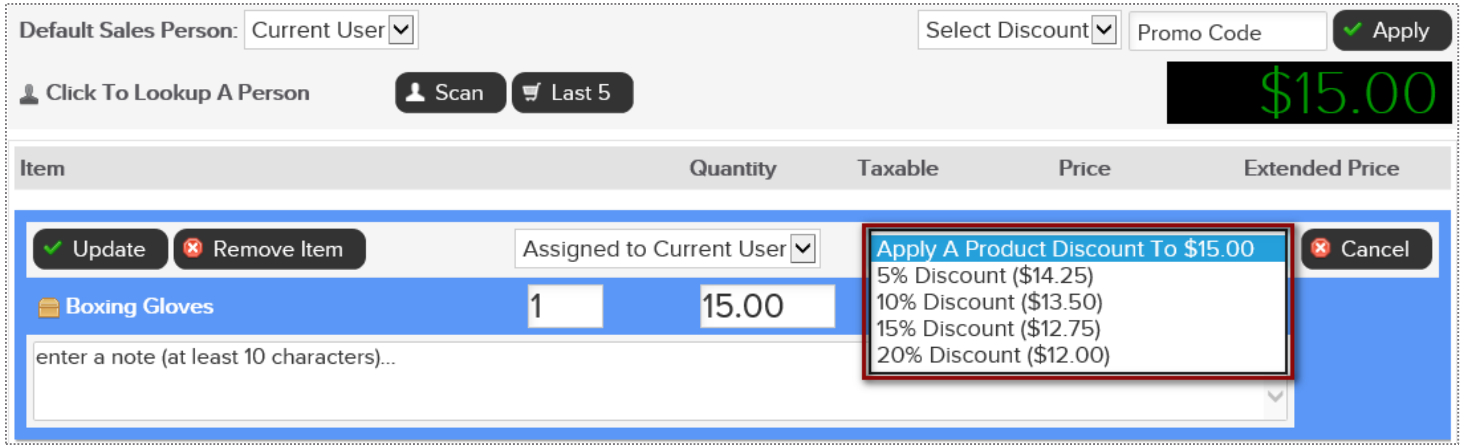


Select the individual product or choose a category. This can be done by selecting the quick pad or performing a **Product Search**. Clicking on the product will place it in the shopping cart.

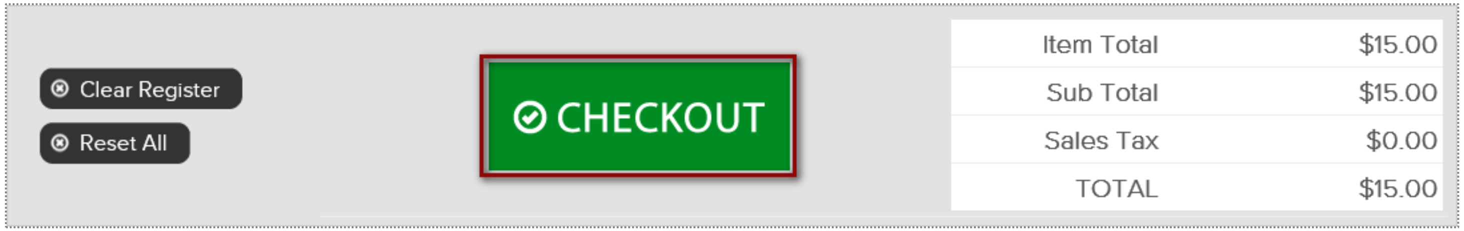
MAYWEATHER BOXING+FITNESS

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.



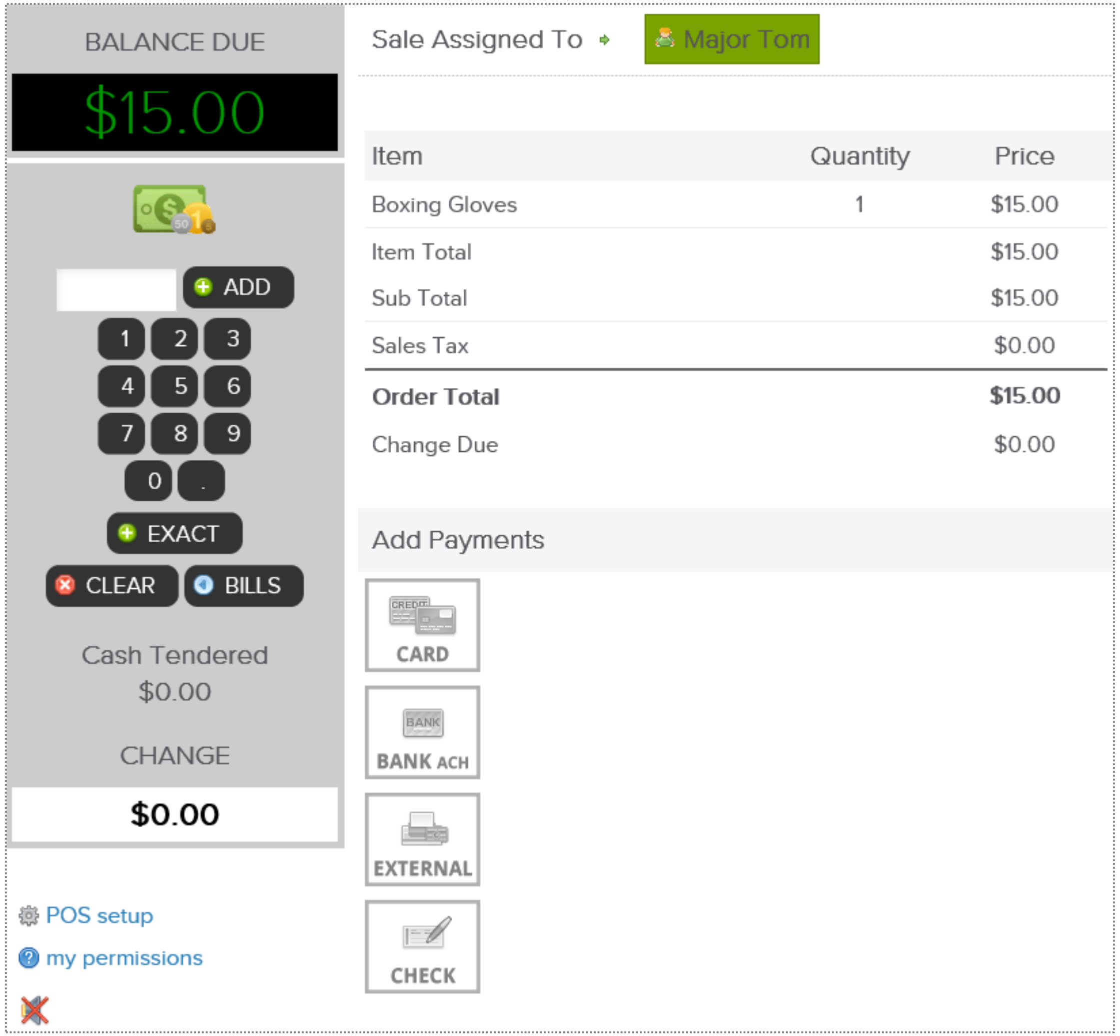
Adjustments may include; modifying the quantity, price, applying a discount or removing the product from the shopping cart.



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

Taking Payment

Select the appropriate payment method.



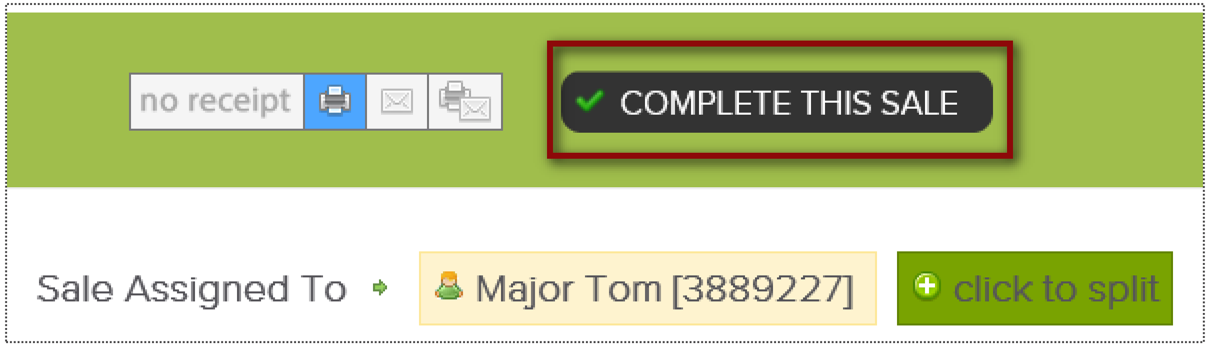
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

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.



At **CHECKOUT** select the payment method and who will get credit for the sale by clicking on the staff name. Next, click **COMPLETE THIS SALE** to finalize purchase.

MAYWEATHER
BOXING+FITNESS

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.

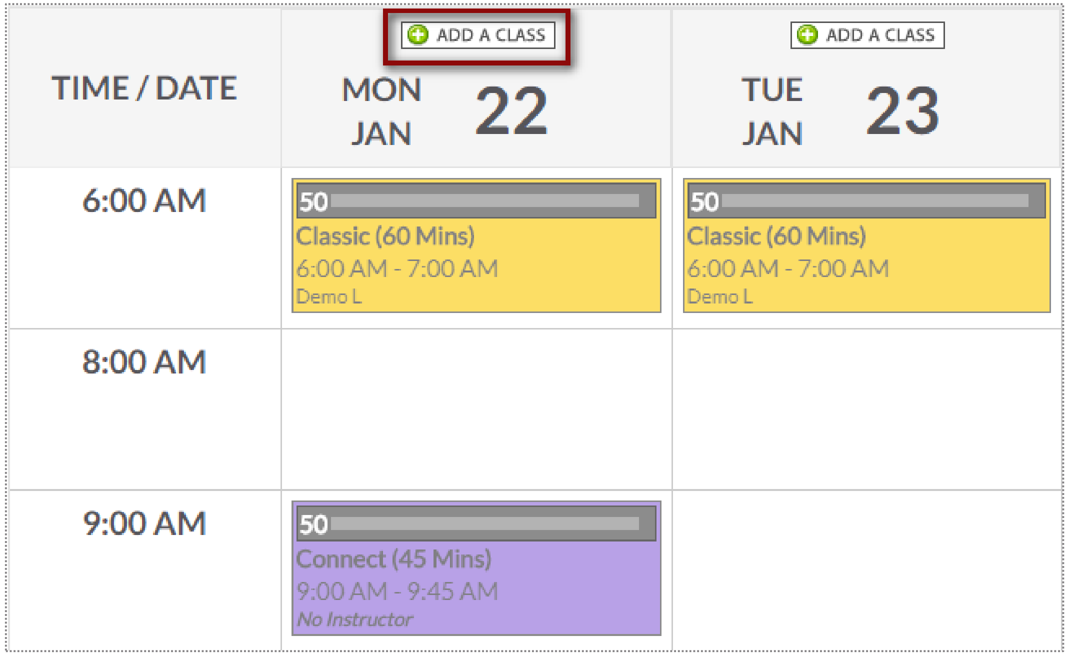
Insufficient Funds - An issue that occurs when an account does not have adequate capital to satisfy a payment demand.

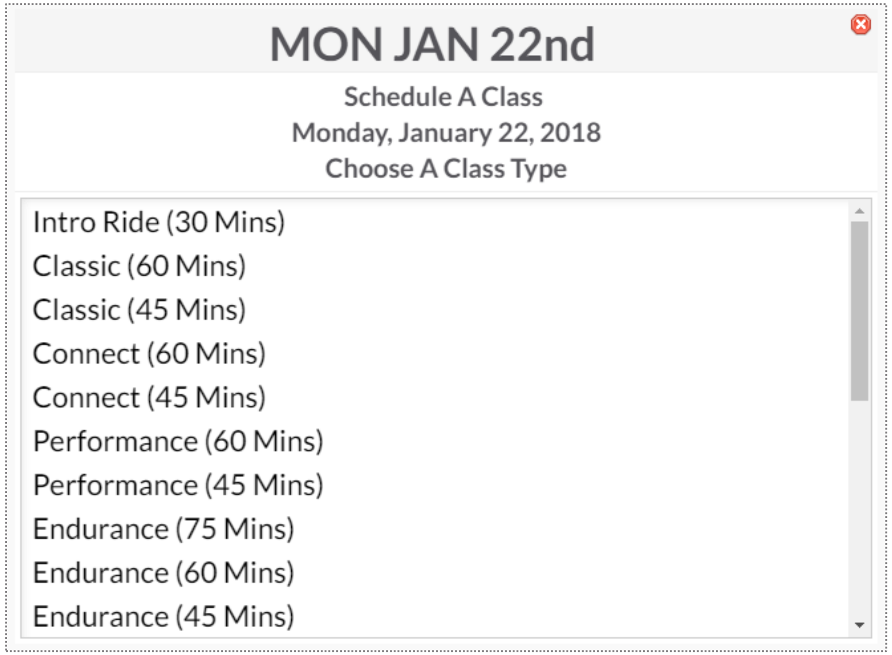
MAYWEATHER
BOXING+FITNESS

Scheduling

Classes: Add a Class to the Schedule

Bookings > Classes



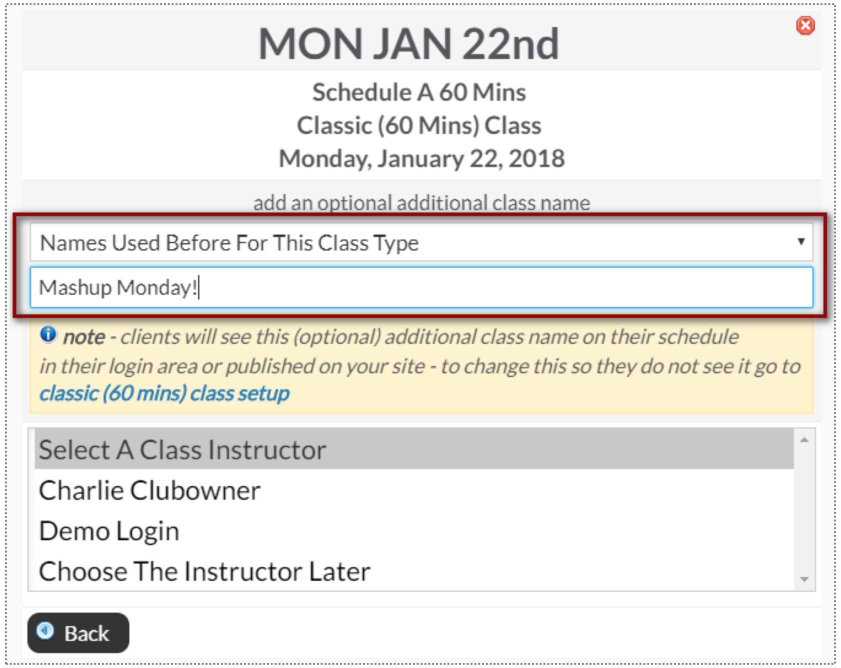


Locate and select the day you want to add the class on the schedule. Click **ADD A CLASS.**

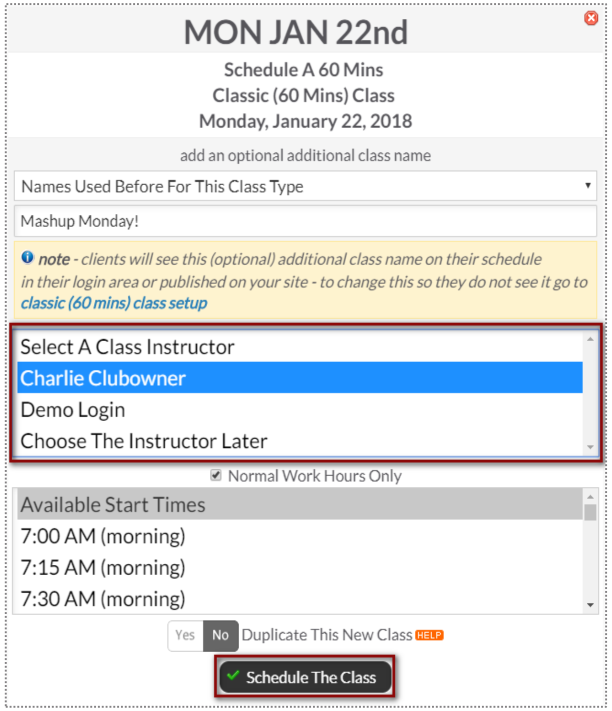
Now **Choose A Class Type** for the date selected.

Classes: Add a Class to the Schedule

Bookings > Classes



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



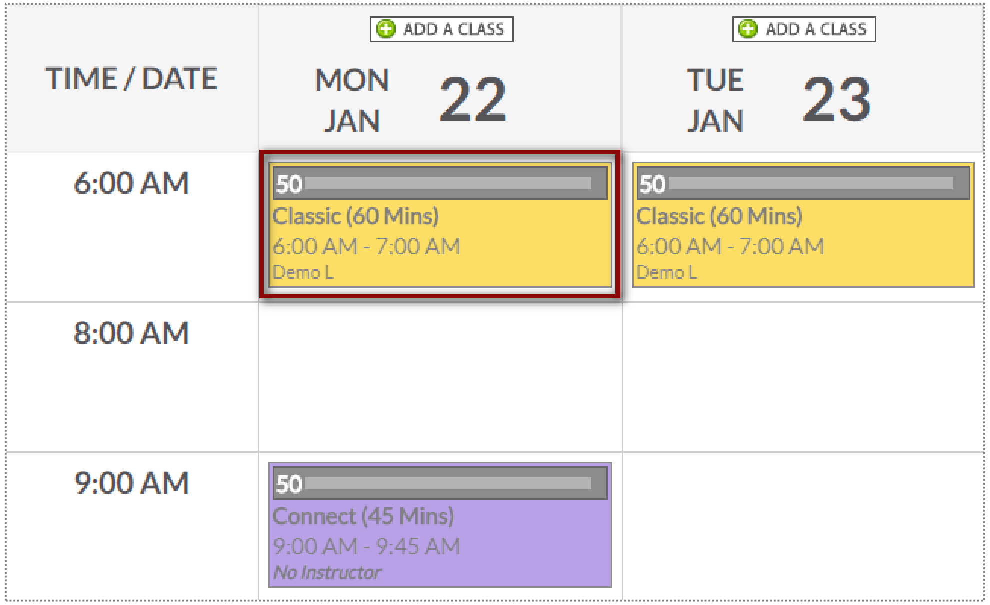
Assign instructor to the class.

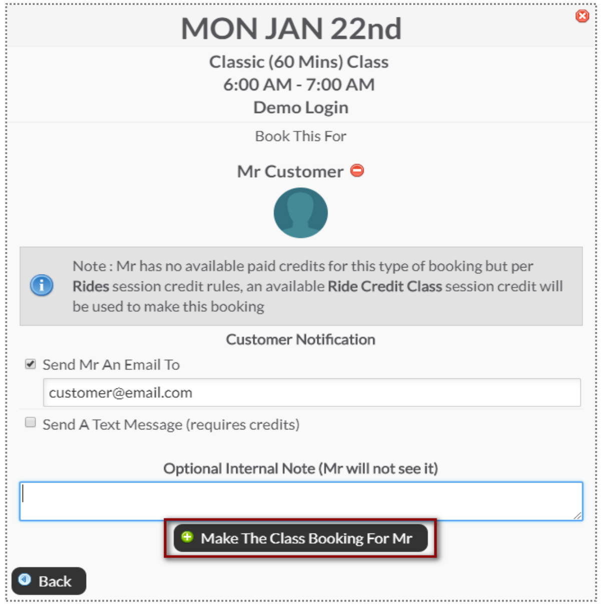
Select the Start time for the class and click **Schedule This Class** to add your class to the schedule.

MAYWEATHER BOXING + FITNESS

Classes: Schedule a Class Booking

Bookings > Classes





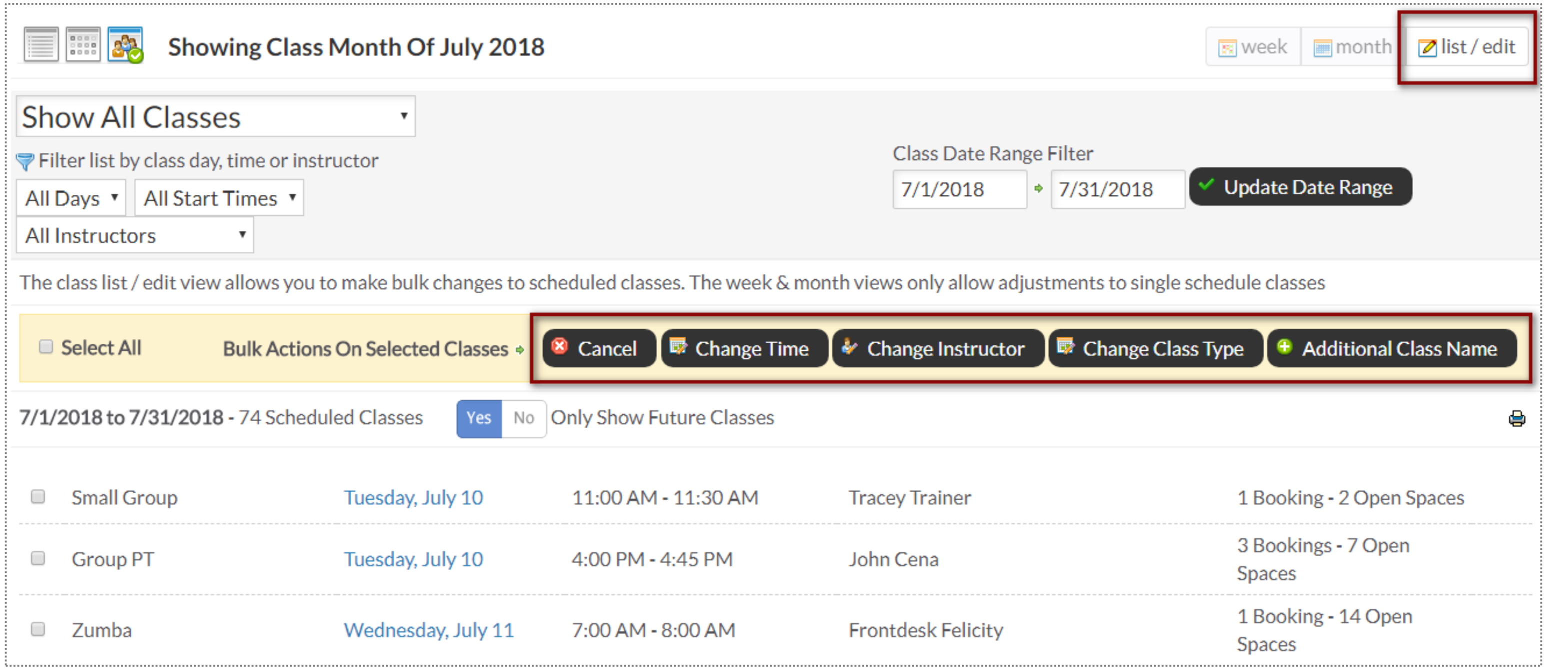
Locate and select the class you want to book customer into. Click the option to **Make A New Booking**.

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.

<u>Note</u>: Only staff with adequate permissions may book a member into a service without credits.

Classes: Bulk Adjust

Bookings > Classes > list / edit



Once you are on the **list/edit** view, you will have the following filter options to narrow down your list: **Show All Classes, Class Date Range, Day, Time** and **Instructors.**

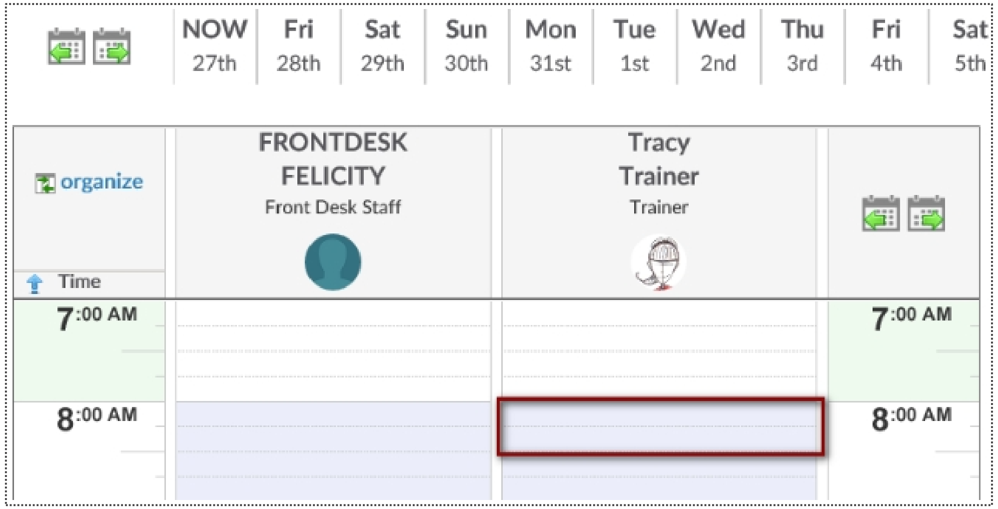
There are check boxes to the left to allow you to individually select specific classes or a select all to change all of the classes listed.

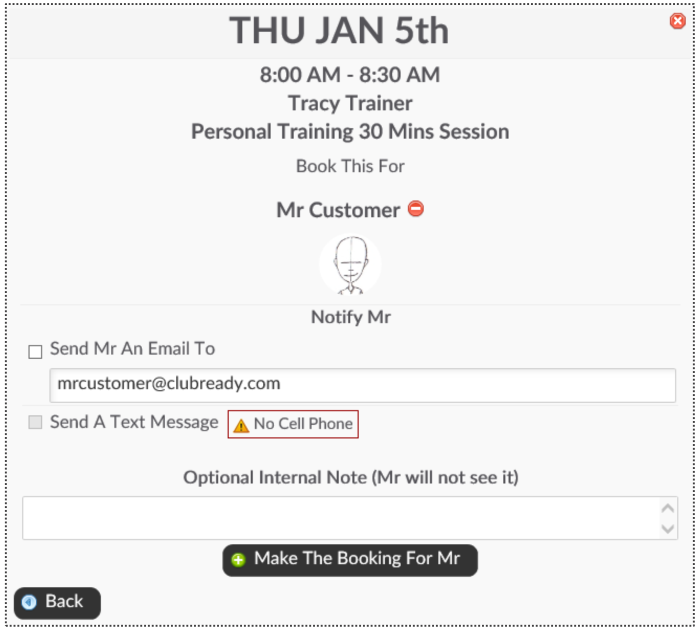
Select from the tool bark which bulk action you wish to perform: **Cancel, Change Time, Change Instructor, Change Class Type** or add an **Additional Class Name**.

MAYWEATHER BOXING + FITNESS

Grid View: Schedule a Service

Bookings > Grid View





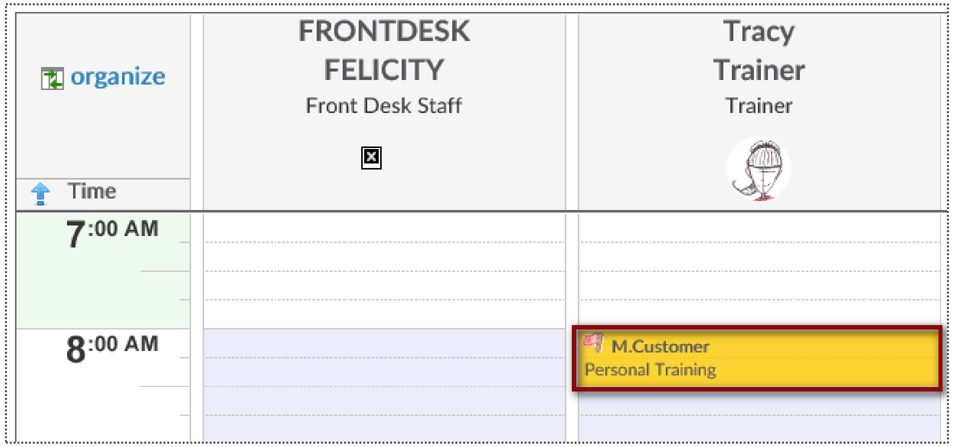
1-on-1 services are scheduled via the Grid View. Select the date and click on the beginning time block under the provider performing the service.

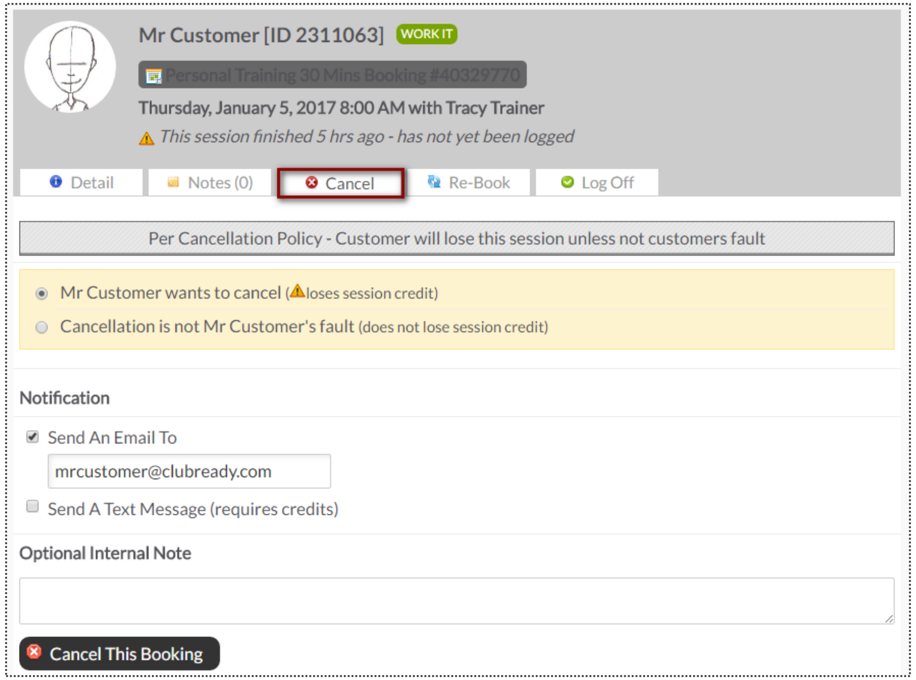
Click the **Add New Booking** button. Select the desired service and use the search box to search for your client.
Send An Email To or Send A Text Message to notify your client of their booking.
Select **Make The Booking** to complete.

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

Grid View: Cancel a Booking

Bookings > Grid View



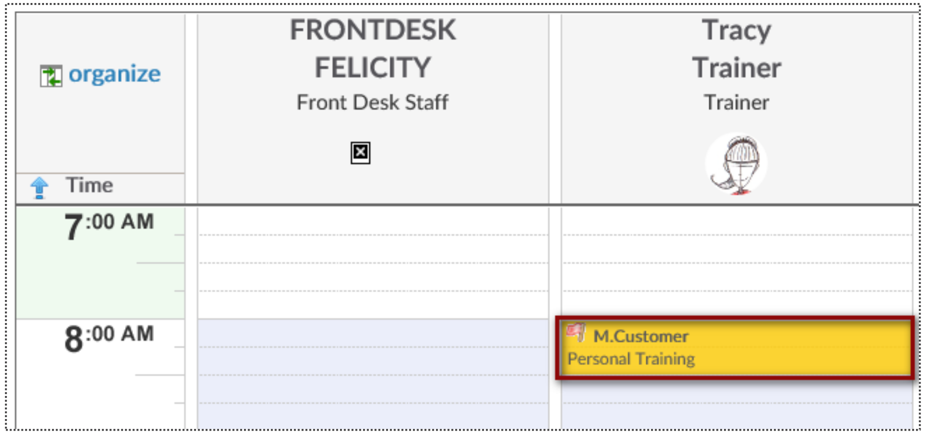


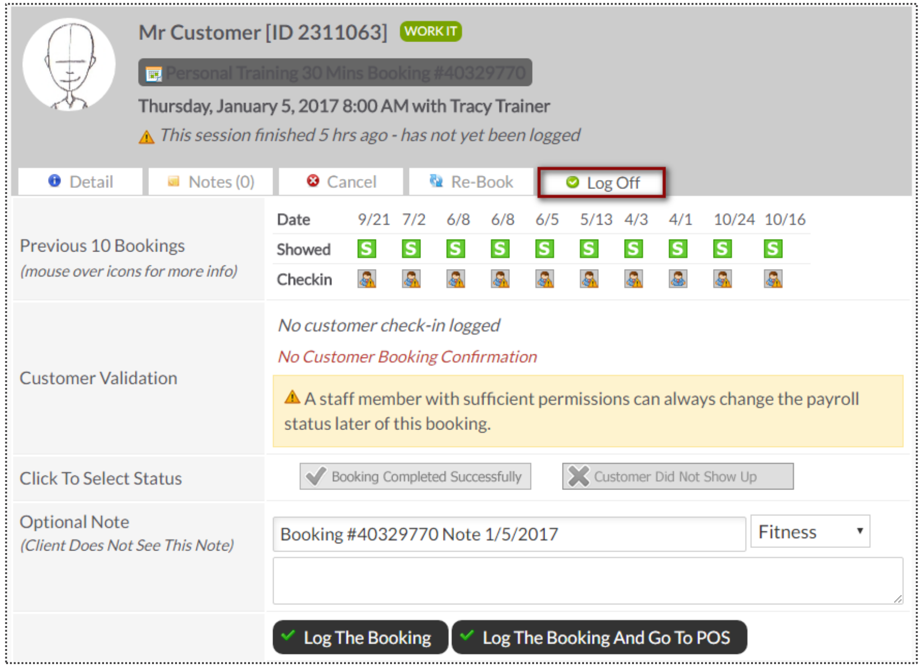
Select the session you wish to cancel and a window will open with management options.

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

Grid View: Manually Log a Session

Bookings > Grid View





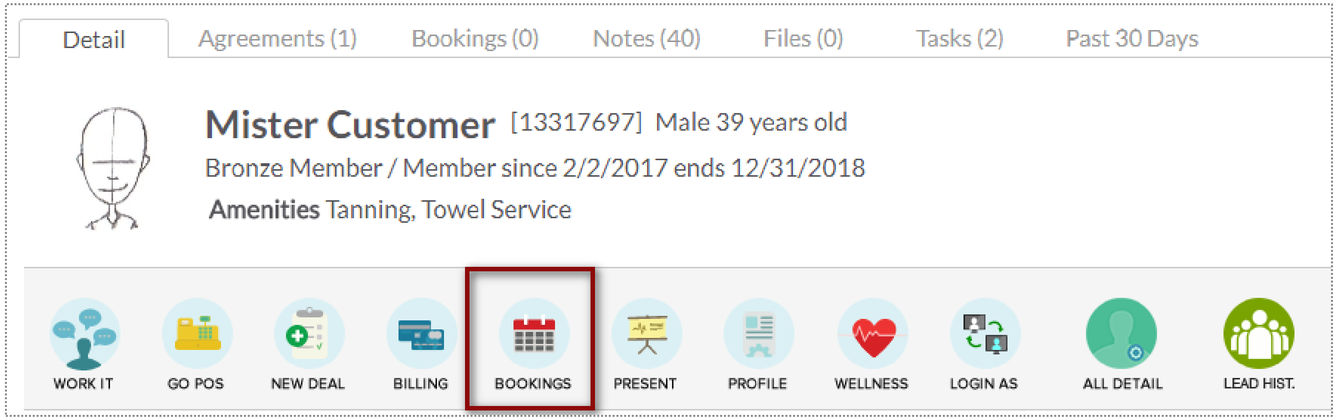
Select the session you wish to log off and a window will open with management options.

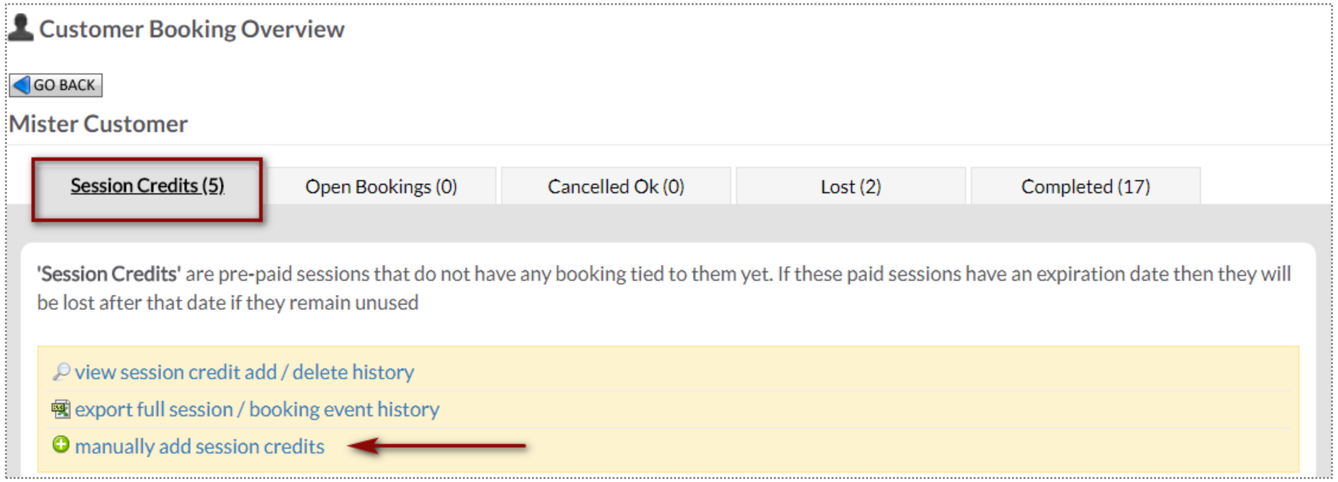
To log a booking click the **Log Off** tab.
Select whether to log the session as successfully completed or as a no show. Click **Log This Booking** to complete the process.

MAYWEATHER
BOXING+FITNESS

Classes: Adding Credits to Account

Member Account > Bookings



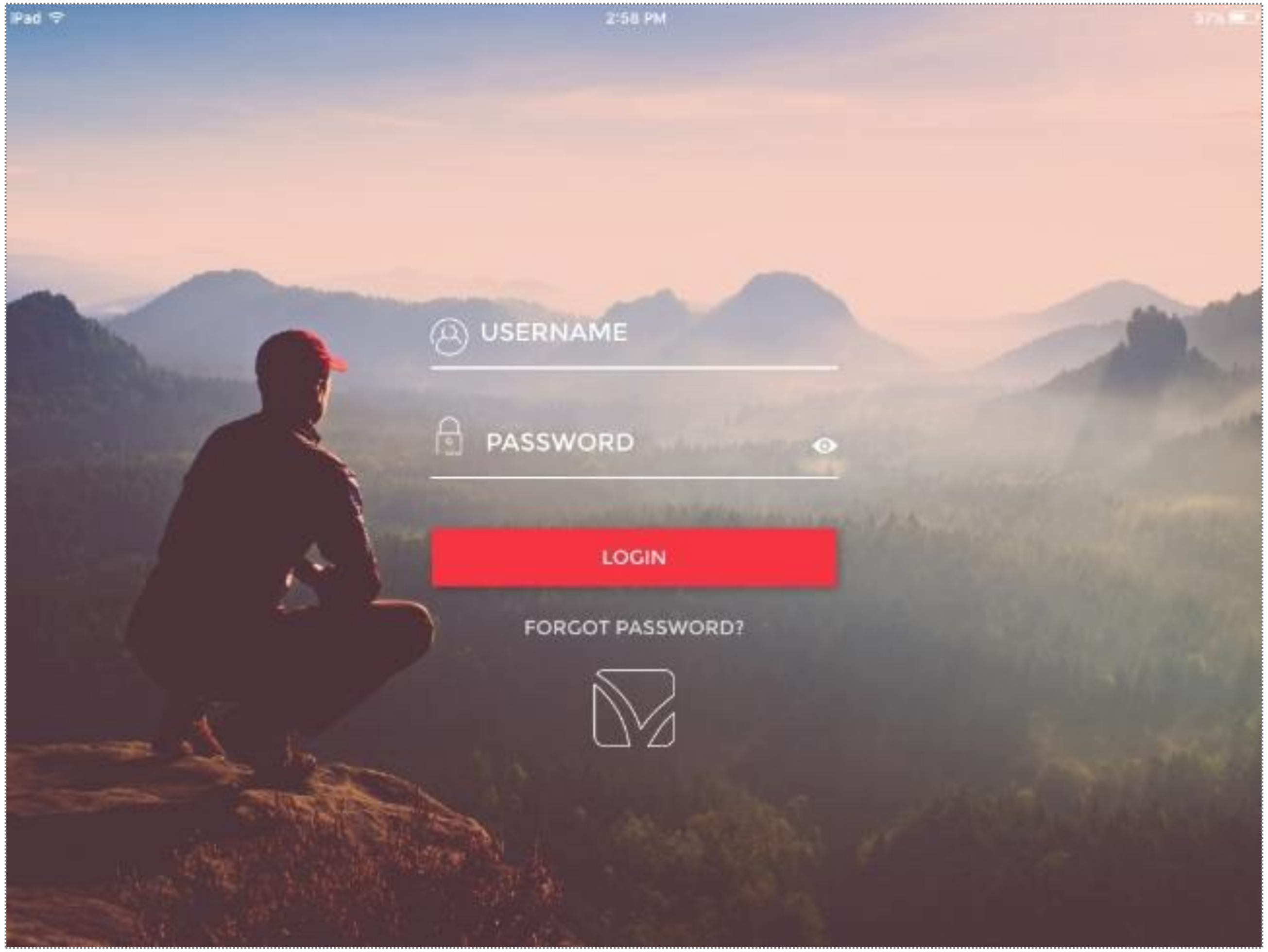


To access this screen search and select the desired client.

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

ClubReady Class Kiosk App: Login Screen

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

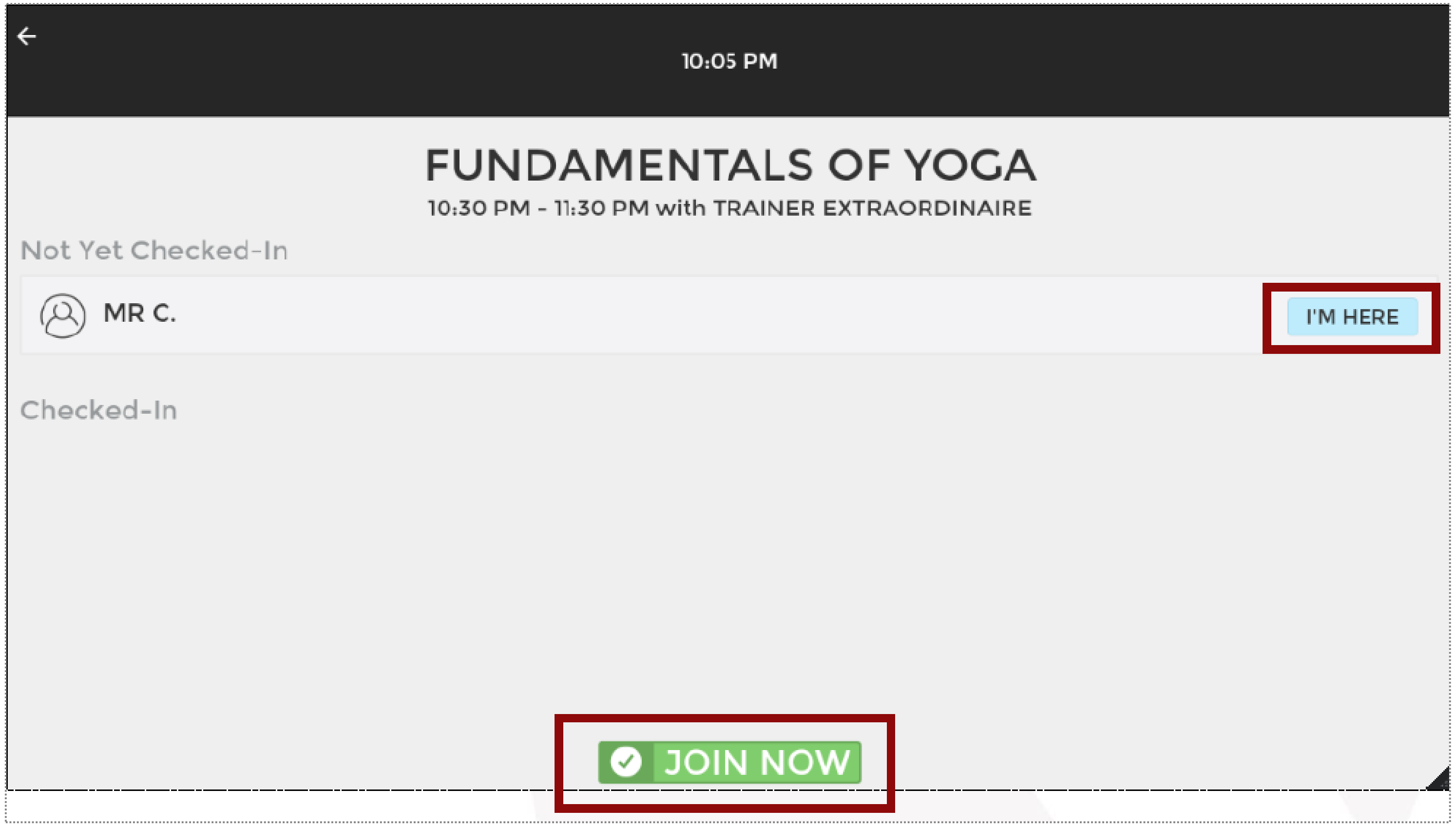


ClubReady Class Kiosk App: View Upcoming Classes

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

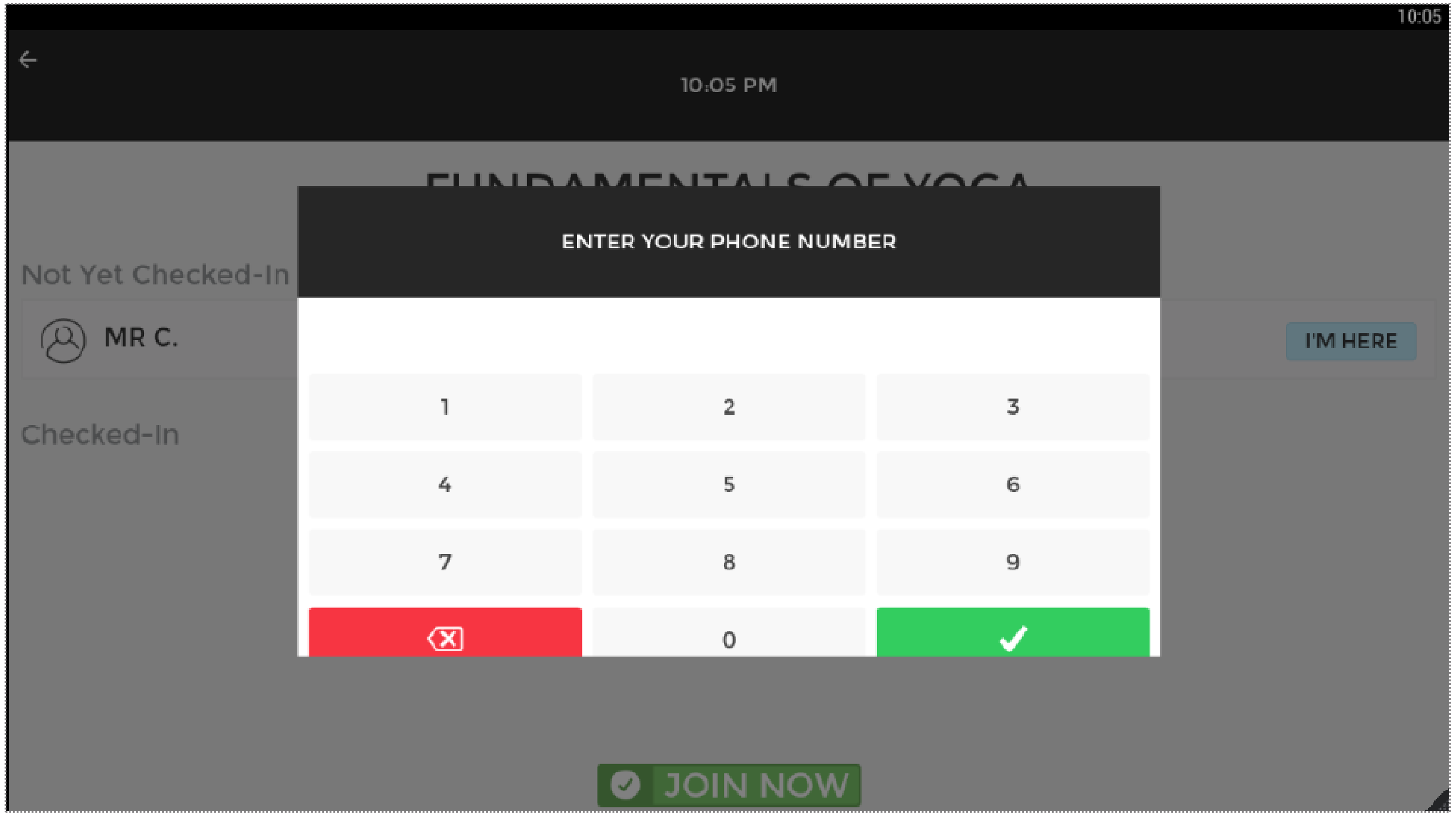
ClubReady Class Kiosk App: View Current Classes

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



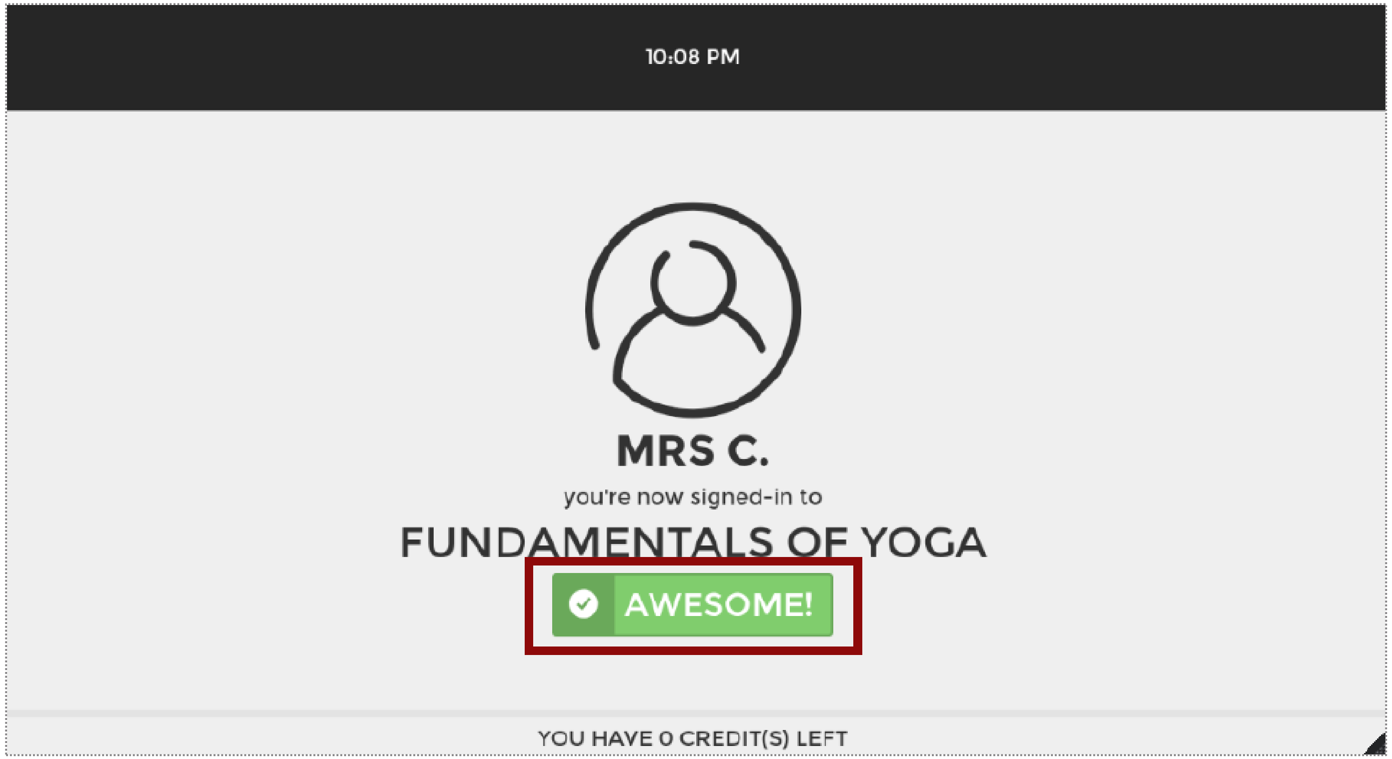
ClubReady Class Kiosk App: Confirm Check In

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



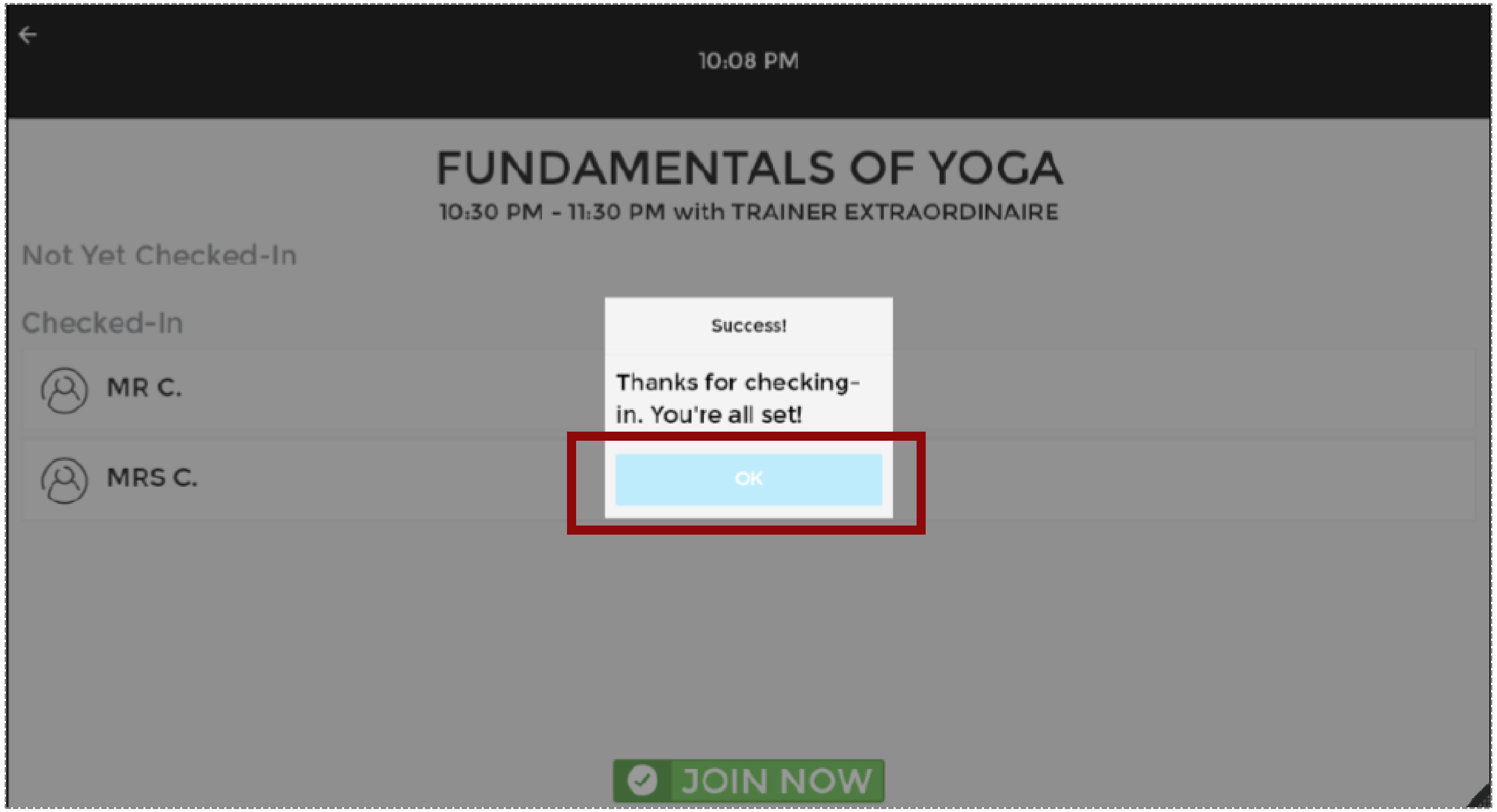
ClubReady Class Kiosk App: Making A New Class Booking

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



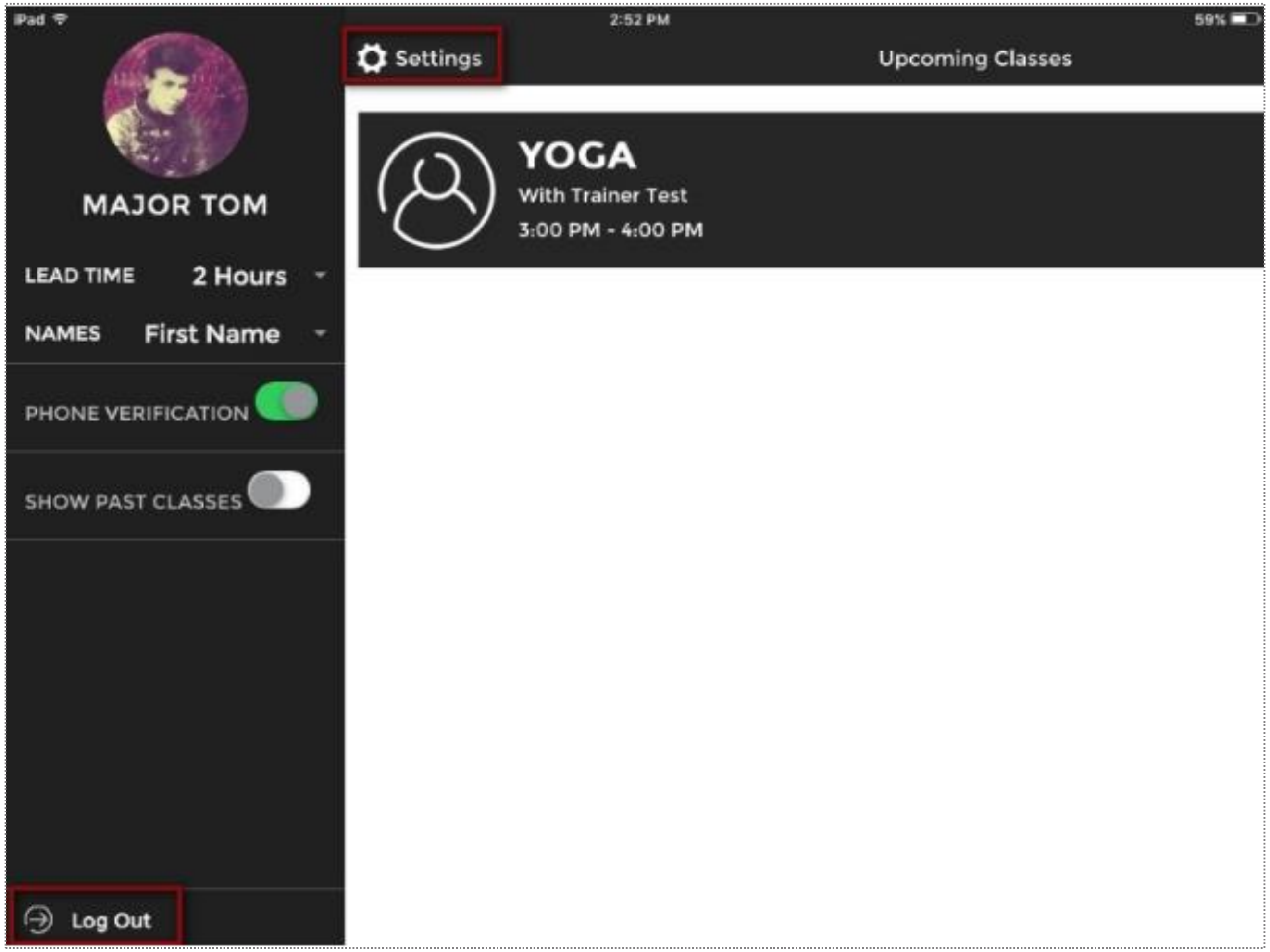
ClubReady Class Kiosk App: Successful Check In

Confirmation will be seen for the member.



ClubReady Class Kiosk App: Editing Your Settings

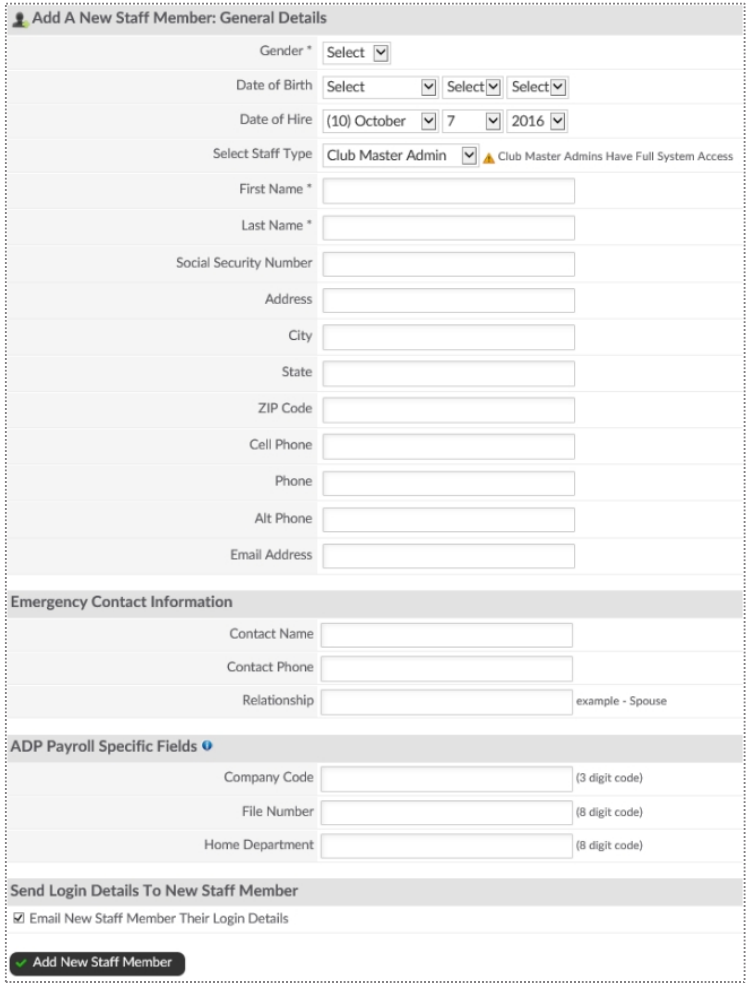
Adjust your personal settings from the app, including Lead Time, Members Name Display and Log Out.



MAYWEATHER BOXING + FITNESS

Add a Staff Member

Staff > Add A New Staff Member



Add A New Staff Member: General Details

Gender * Select
Date of Birth Select Select Select
Date of Hire (10) October 7 2016
Select Staff Type Club Master Admin — Club Master Admins Have Full System Access
First Name *
Last Name *
Social Security Number
Address
City
State
ZIP Code
Cell Phone
Phone
Alt Phone
Email Address

Emergency Contact Information

Contact Name
Contact Phone
Relationship — example - Spouse

ADP Payroll Specific Fields

Company Code (3 digit code)
File Number (8 digit code)
Home Department (8 digit code)

Send Login Details To New Staff Member

☑ Email New Staff Member Their Login Details

Add New Staff Member

Select **Gender**, **Date of Hire** and **Staff Type**. Continue adding their basic information such as **Name**, **Address**, **Email**, and **Phone**.

Select whether you would like to have the staff member's login credential sent to the above inputted email address. **(recommended)**

Click the **Add New Staff Member** button to save the staff member and his or her details.

Stay Connected with ClubReady!

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

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**

ClubReady