



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 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](#)

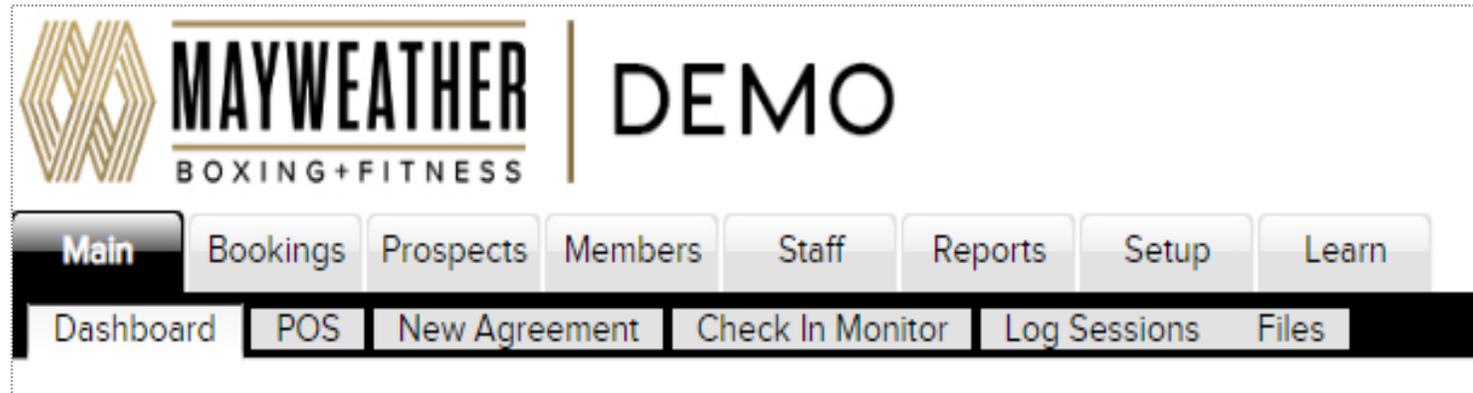
SETUP > AUTOMATION

- [LEAD ASSIGNMENT](#)

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.

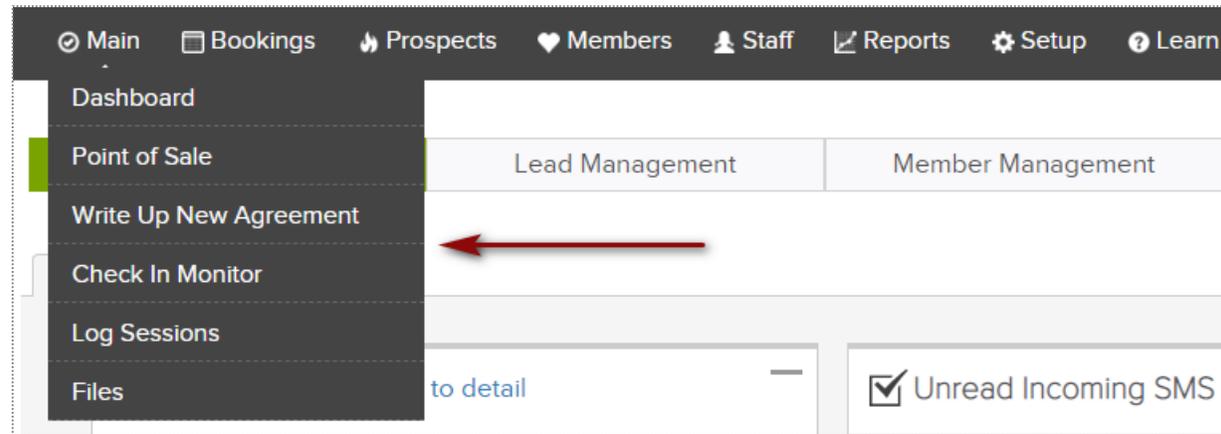
ClubReady Menu Style: Large View



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



ClubReady Menu Style: Small View

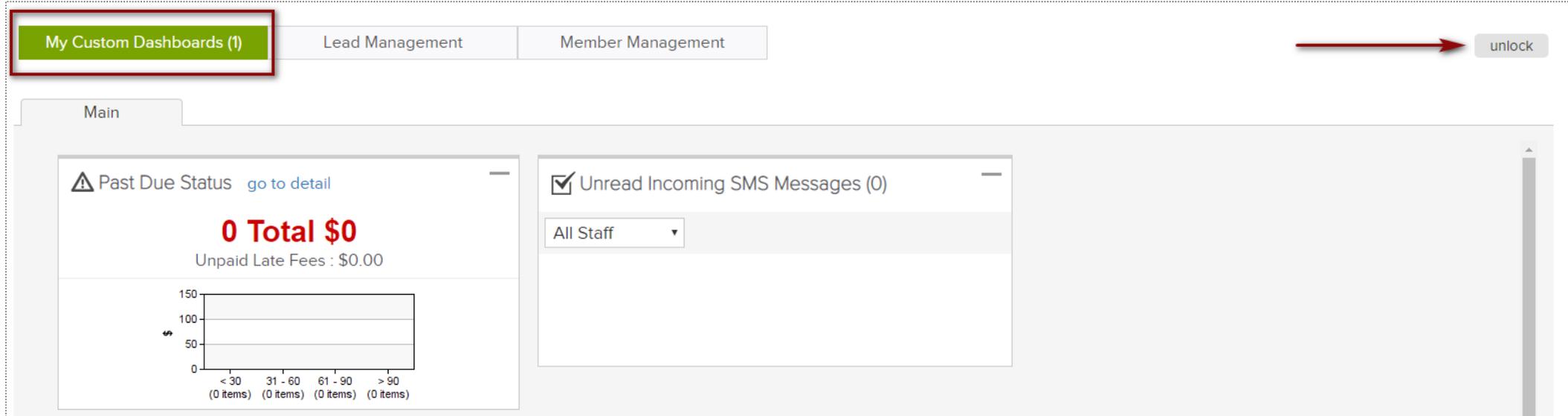


This menu style takes up less space but has no club logo. This menu style offers the same menu options, with a drop down menu's as a single menu strip along the top of the page.

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

Custom Dashboard & Widgets

Main > Dashboard

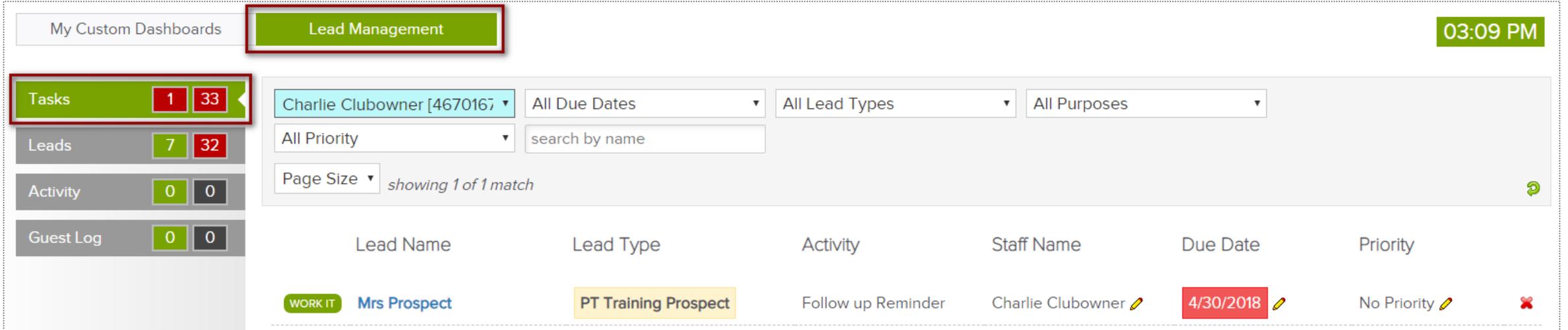


This dashboard allows for you to add, arrange and delete widgets. Widgets show quick reports or allows for quick actions to be completed by a staff.

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

Lead Management Dashboard: Tasks

Main > Dashboard



My Custom Dashboards **Lead Management** 03:09 PM

Tasks 1 33
Leads 7 32
Activity 0 0
Guest Log 0 0

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
WORK IT 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.

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

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
WORK IT Jason Smith	Unscheduled Lead	Flyer	Telephone Inquiry	Added 4 days ago	✓ 1 contact
WORK IT Jon Martin	Visit "Booked"	Instagram	Telephone Inquiry	Added last month	✓ 1 contact

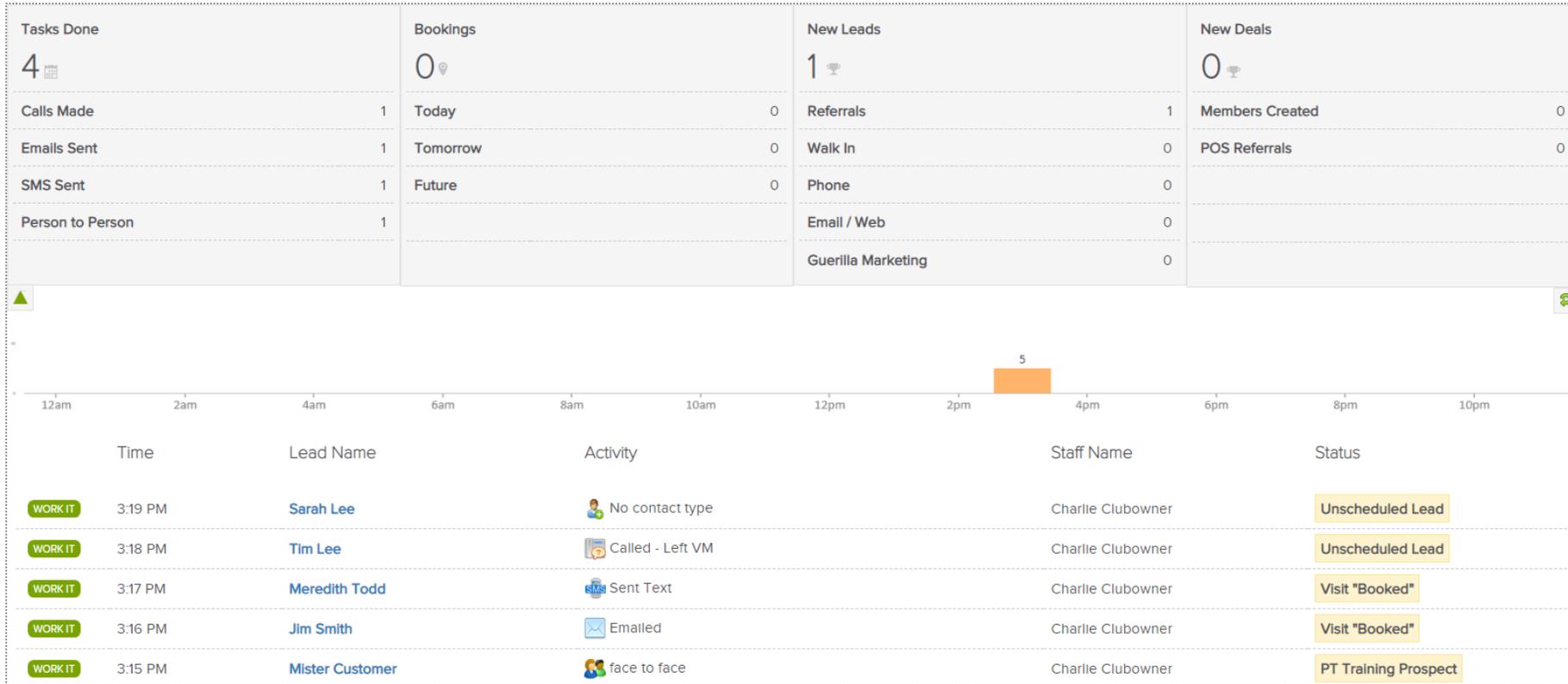
The **Leads** tab will display all of the leads added. The number displayed to the left show leads assigned to the staff member currently logged in. The number displayed to the right show all of the club's leads.

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.

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

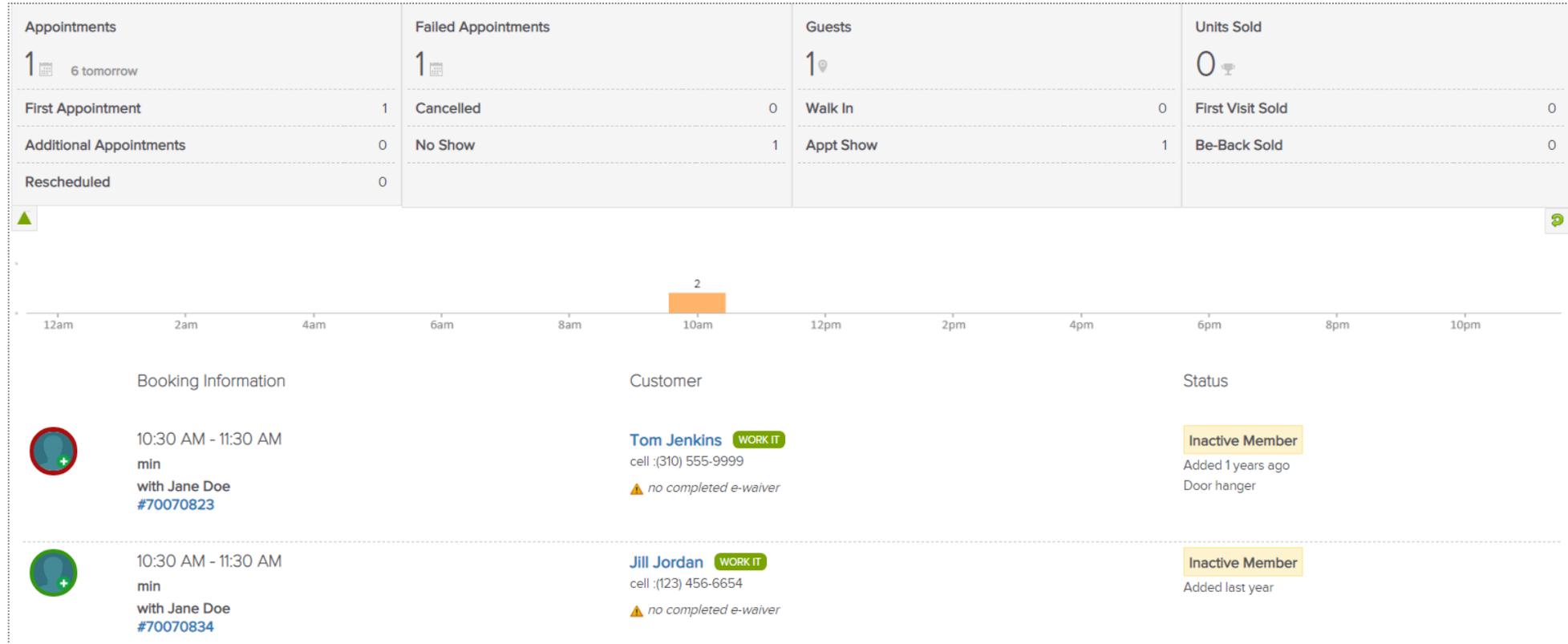
Main > Dashboard



The **Activity** tab reflects current data or activity for a specific day. The report will display **Tasks Done**, **Bookings**, **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: Tasks

Main > Dashboard

My Custom Dashboards Lead Management **Member Management** 02:22 PM

Tasks 0 0 Members 0 0 Activity 0 0

All Staff All Due Dates All Lead Types All Purposes All Priority

showing 2 of 2 matches

Member Name	Member Type	Activity	Staff Name	Due Date	Priority
WORK IT Mister Customer	No Member Type	call (555) 123-4789 (cell) Past Due Payment	Master Admin	8/30/2019	No Priority
WORK IT John Smith	No Member Type	Send Email Follow Up Day 30	Master Admin	8/30/2019	No Priority

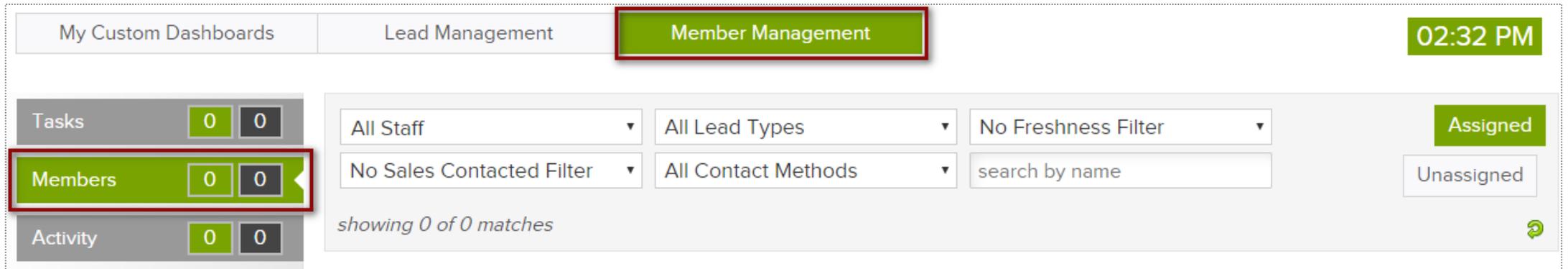
The **Tasks** tab will display all of the tasks created for members only. The number displayed to the left show tasks assigned to the staff member currently logged in. The number displayed to the right show tasks for all the club.

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



My Custom Dashboards Lead Management **Member Management** 02:32 PM

Tasks 0 0

Members 0 0

Activity 0 0

All Staff All Lead Types No Freshness Filter Assigned

No Sales Contacted Filter All Contact Methods search by name Unassigned

showing 0 of 0 matches

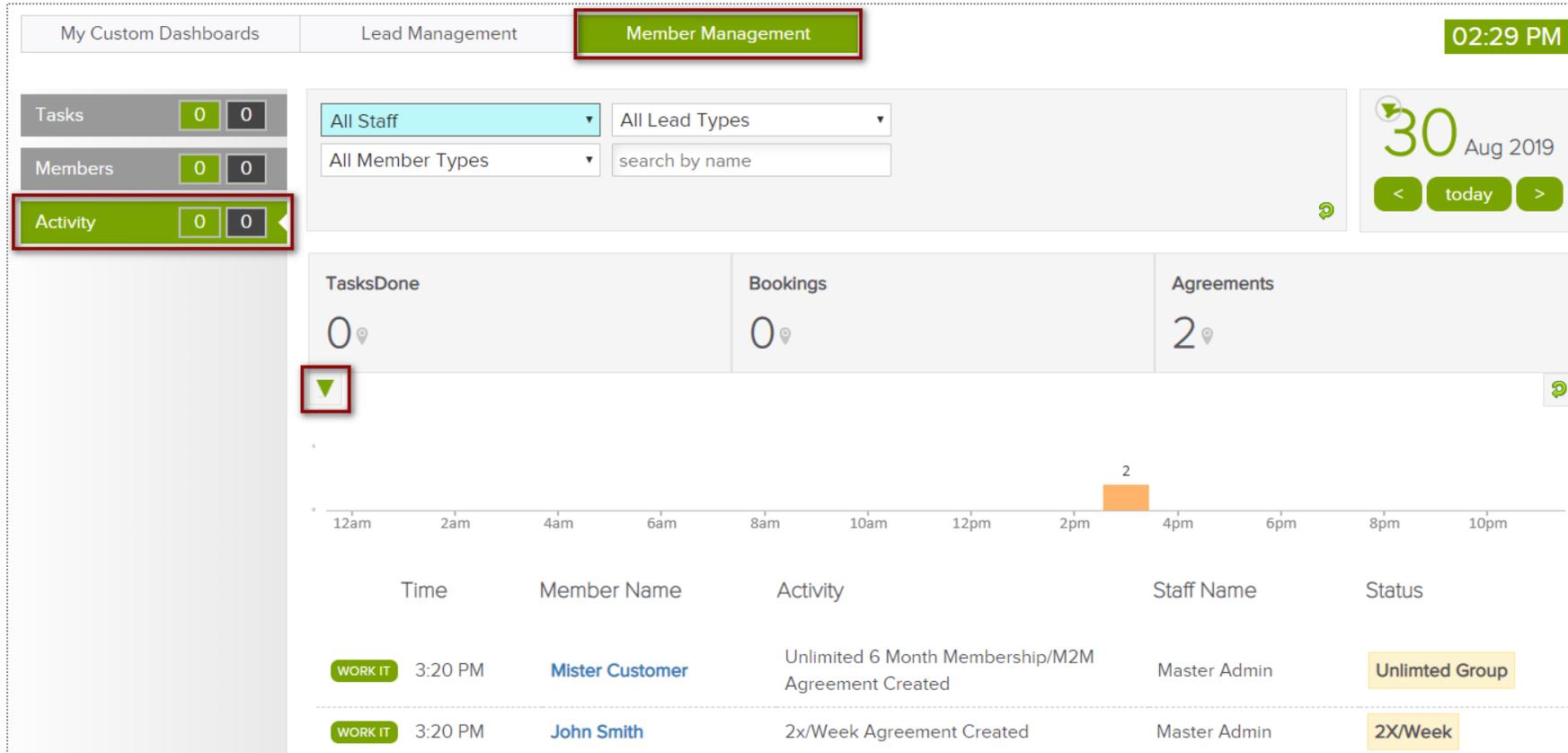
The **Members** tab will display all of the members in your site. The number displayed to the left show members assigned to the staff member currently logged in. The number displayed to the right show all of the club's members.

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



My Custom Dashboards | Lead Management | **Member Management** | 02:29 PM

Tasks: 0 | 0
Members: 0 | 0
Activity: 0 | 0

All Staff | All Lead Types
All Member Types | search by name

30 Aug 2019
< today >

TasksDone: 0 | Bookings: 0 | Agreements: 2

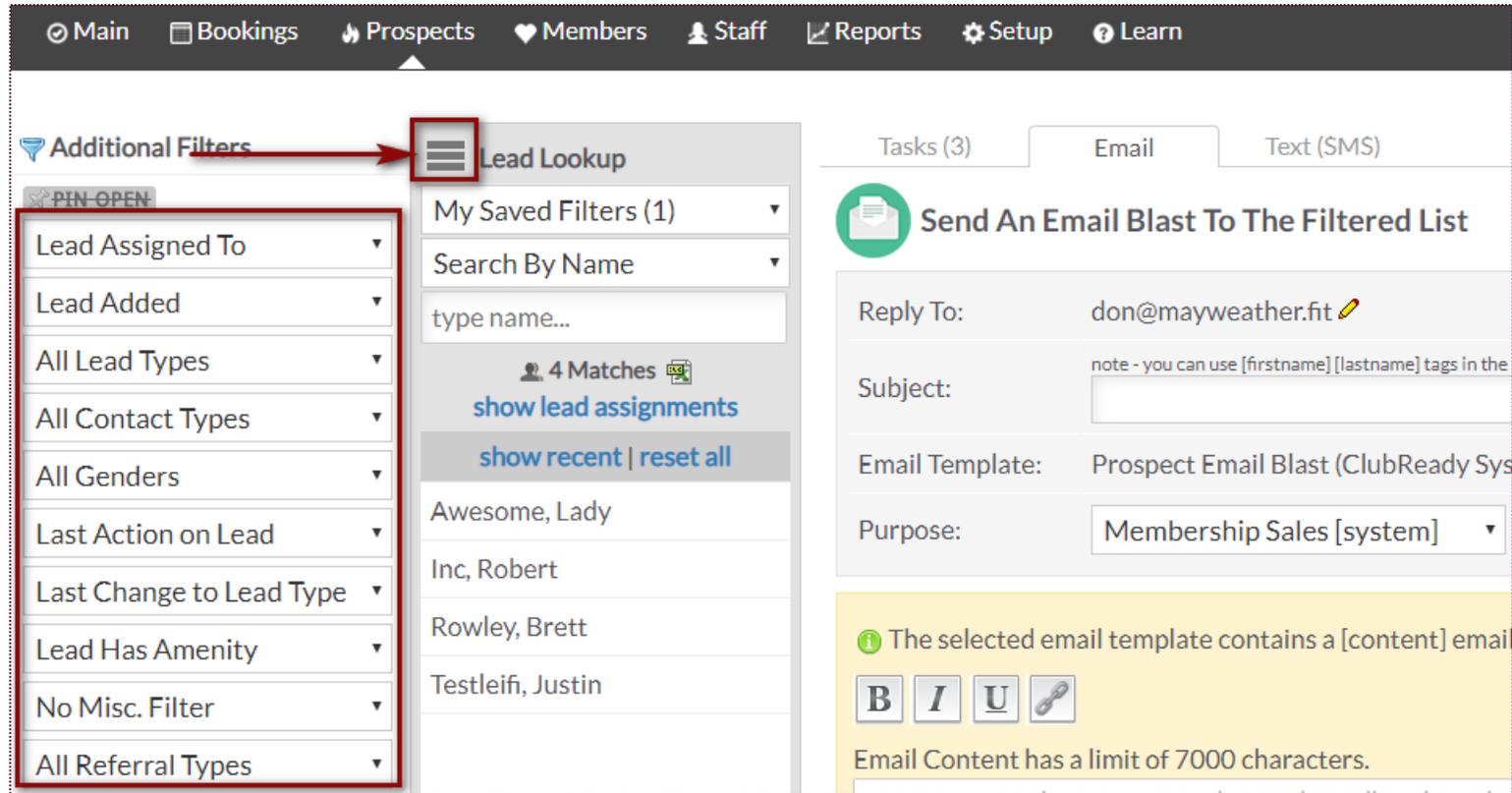
Time: 12am, 2am, 4am, 6am, 8am, 10am, 12pm, 2pm, 4pm, 6pm, 8pm, 10pm

Time	Member Name	Activity	Staff Name	Status
WORK IT 3:20 PM	Mister Customer	Unlimited 6 Month Membership/M2M Agreement Created	Master Admin	Unlimited Group
WORK IT 3:20 PM	John Smith	2x/Week Agreement Created	Master Admin	2X/Week

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

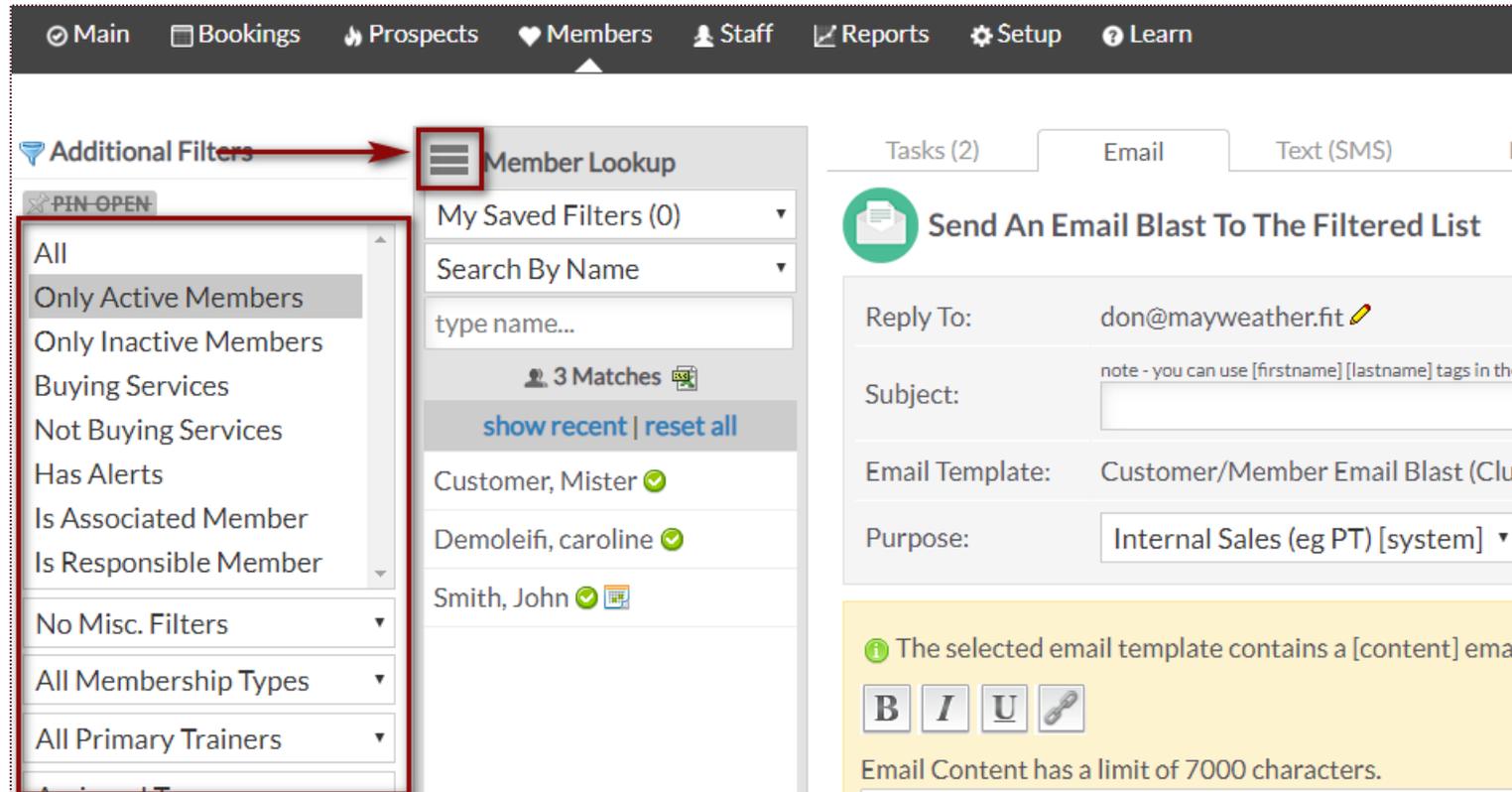
Prospects > Membership Prospects



The screenshot displays a software interface for managing prospects. At the top, a navigation bar includes links for Main, Bookings, Prospects, Members, Staff, Reports, Setup, and Learn. The main content area is divided into two sections. On the left, under 'Additional Filters', a list of filter options is shown, with a red box highlighting the entire list and a red arrow pointing to a 'Lead Lookup' button. The filter options include: 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, and All Referral Types. The 'Lead Lookup' panel shows 'My Saved Filters (1)', a search input field with the placeholder 'type name...', and a list of 4 matches: 'Awesome, Lady', 'Inc, Robert', 'Rowley, Brett', and 'Testleifi, Justin'. On the right, the 'Send An Email Blast To The Filtered List' configuration panel is visible, featuring tabs for 'Tasks (3)', 'Email', and 'Text (SMS)'. The 'Email' tab is active, showing fields for 'Reply To' (don@mayweather.fit), 'Subject' (with a note about tags), 'Email Template' (Prospect Email Blast (ClubReady Sys), and 'Purpose' (Membership Sales [system]). A yellow warning box at the bottom indicates that the selected email template contains a [content] email tag. Below the warning are formatting icons for Bold (B), Italic (I), Underline (U), and Link, and a note that 'Email Content has a limit of 7000 characters.'

Lookup Members

Members > Lookup



The screenshot shows the 'Members > Lookup' interface. At the top, there is a navigation bar with icons for Main, Bookings, Prospects, Members, Staff, Reports, Setup, and Learn. Below this, the 'Additional Filters' section is highlighted with a red box and an arrow. It contains a 'PIN-OPEN' button and a list of filter options: 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, and All Primary Trainers. To the right of the filters is the 'Member Lookup' panel, also highlighted with a red box. It includes a search bar with the placeholder 'type name...', a '3 Matches' indicator, and a list of results: 'Customer, Mister', 'Demoleifi, caroline', and 'Smith, John'. On the far right, the 'Send An Email Blast To The Filtered List' form is visible, with fields for Reply To (don@mayweather.fit), Subject, Email Template (Customer/Member Email Blast (Clu...)), and Purpose (Internal Sales (eg PT) [system]). A yellow warning box at the bottom of the form states: 'The selected email template contains a [content] email' and 'Email Content has a limit of 7000 characters.'

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"/> <small>start typing (at least 3 characters) to select from list</small>
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"/>
<input checked="" type="checkbox"/> Email Is Sent?	<input checked="" type="checkbox"/> Yes - New Prospect Email email template is used info about this
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.

Sales Process

Writing an Agreement

Main > New Agreement > Select Person > Confirm

Write Up A New Agreement At Training Team Sandbox

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 <small>REQ</small>	Mr
<input checked="" type="checkbox"/> include in duplicate search	
Last Name <small>REQ</small>	Customer
<input checked="" type="checkbox"/> include in duplicate search	
Gender <small>REQ</small>	<input checked="" type="radio"/> MALE <input type="radio"/> FEMALE
<input checked="" type="checkbox"/> include in duplicate search	
Date Of Birth	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>
Address <small>REQ</small>	1 Main Street
City <small>REQ</small>	Anywhere
State <small>REQ</small>	MO
ZIP Code <small>REQ</small>	63001
Email <small>REQ</small>	customer@clubready.com
<input checked="" type="checkbox"/> include in duplicate search	
Cell Phone	(555) 123-4141
<input checked="" type="checkbox"/> include in duplicate search	
Home Phone <small>REQ</small>	(555) 123-4141
Work Phone	
Drivers License No.	
Barcode	
External User ID	

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

 Presale Membership Packages [go back](#)

Select This Package	\$89.00 - Monthly Unlimited \$0 Down (PreSale Special) MEMBERSHIP view details
Select This Package	\$99.00 - Monthly Unlimited (PreSale Special) MEMBERSHIP view details
Select This Package	\$79.00 - 2x/Week  MEMBERSHIP view details

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

Writing a Membership Agreement

Select Plan > Adjust Pricing & Pay Dates

 Write Up A New Agreement For [Mister Customer \[62912962\]](#)

Step 1  Agreement Setup **Step 2**  Review & Finalize **Step 3** Complete

 **SECURE**

Monthly Unlimited (PreSale Special) (\$99.00)
[choose a different sales package](#) | [go to setup for this sales package](#)

Installment Duration 3 Months

Buyers Name

Included Amenities (click amenity to open description)

Agreement Classification [Show Agreement Classification](#)

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.

Writing a Membership Agreement

Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup

Select Package Discount Enter Promo Code [Reset Discount](#)

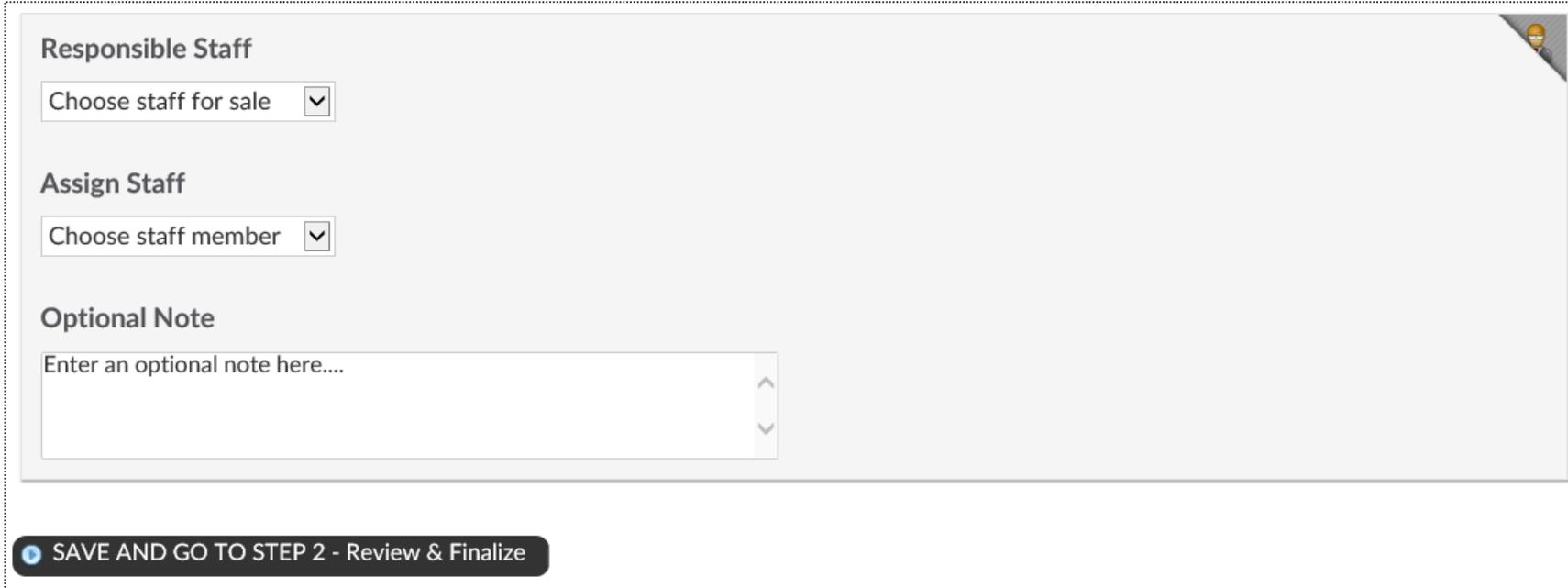
# 1	<input type="button" value="Down"/>	\$ 99.00	<input type="text" value="9/4/2019"/>
Total Price		\$99.00	
Subtotal		\$99.00	
Sales Tax		\$0.00	
Account Credit Balance		\$0.00	
Total Due Today <input checked="" type="checkbox"/>		\$99.00	<input type="button" value="PTP Option"/>

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.

Writing a Membership 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**.

Writing a Membership Agreement

Review Terms > Take Signatures

Step 1  Agreement Setup

Step 2  Review & Finalize

Step 3 Complete

 **SECURE**

Review [hide review details](#)

- ✔ Base Monthly
- ✔ Total initial term price is \$9.95
- ✔ Initiation: \$40.00 to be paid today
- ✔ Total Down Payment Today \$49.95
- ✔ Installment payment is today for \$9.95
- ✔ Then auto-renew at \$9.95
- ✔ Crunch Enhancement Fee every 12 months starting on 8/1/2017 (\$39.00)

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

Agreement

✔ This agreement requires 1 signatures - Signature capture method - **On-Screen Signature**

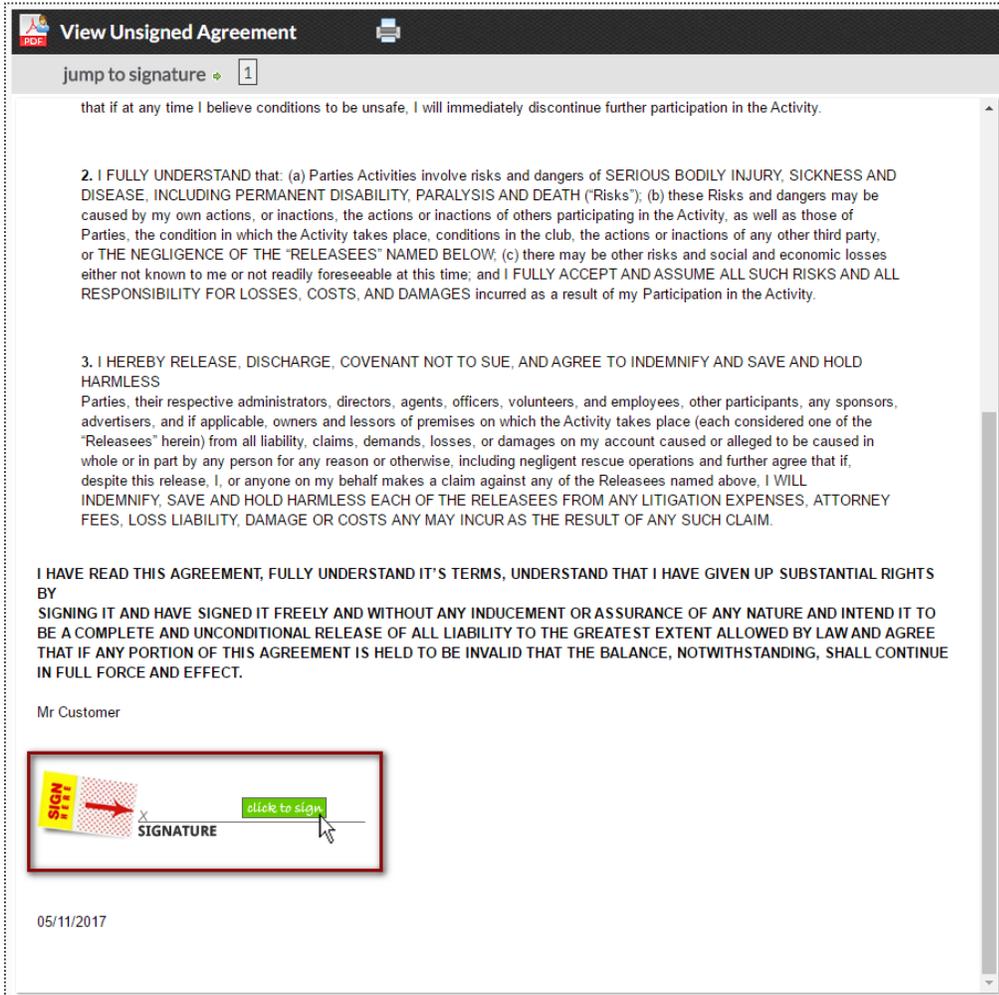
 **UNSIGNED AGREEMENT**
CLICK TO REVIEW & SIGN

 **CLICK HERE TO ONLY TAKE SIGNATURES**

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 sponsors, advertisers, and if applicable, owners and lessors of premises on which the Activity takes place (each considered one of the "Releasees" herein) from all liability, claims, demands, losses, or damages on my account caused or alleged to be caused in 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 INTEND IT TO BE A COMPLETE AND UNCONDITIONAL RELEASE OF ALL LIABILITY TO THE GREATEST EXTENT ALLOWED BY LAW AND AGREE THAT IF ANY PORTION OF THIS AGREEMENT IS HELD TO BE INVALID THAT THE BALANCE, NOTWITHSTANDING, SHALL CONTINUE 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 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.



 Electronic Signature 1 of 1 [CLICK TO SKIP THIS SIGNATURE](#)

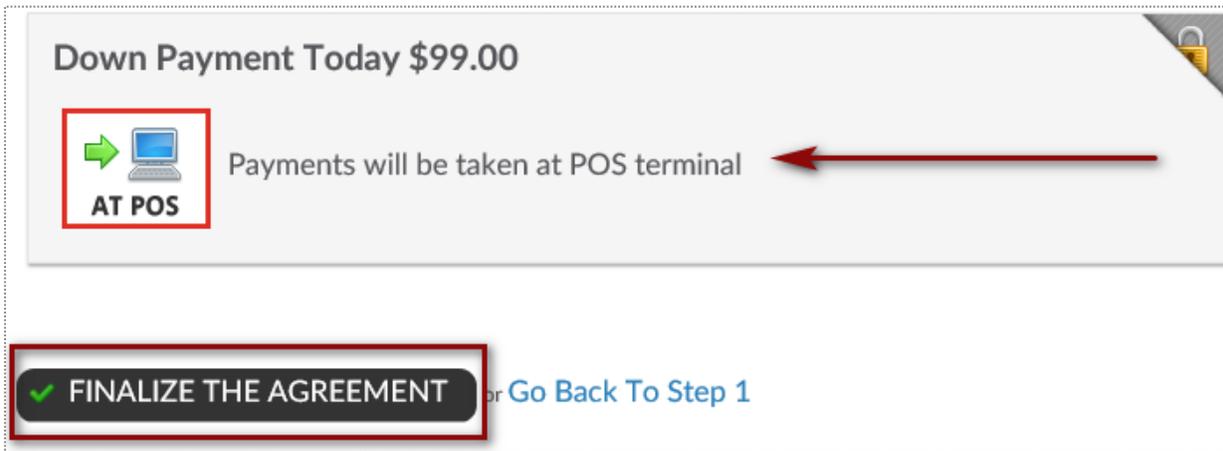
Sign here!



[cancel](#)

Writing a Membership Agreement

Take Payment & Finalize the Deal



Down Payment Today \$99.00

  **AT POS**

Payments will be taken at POS terminal



 **FINALIZE THE AGREEMENT** or [Go Back To Step 1](#)

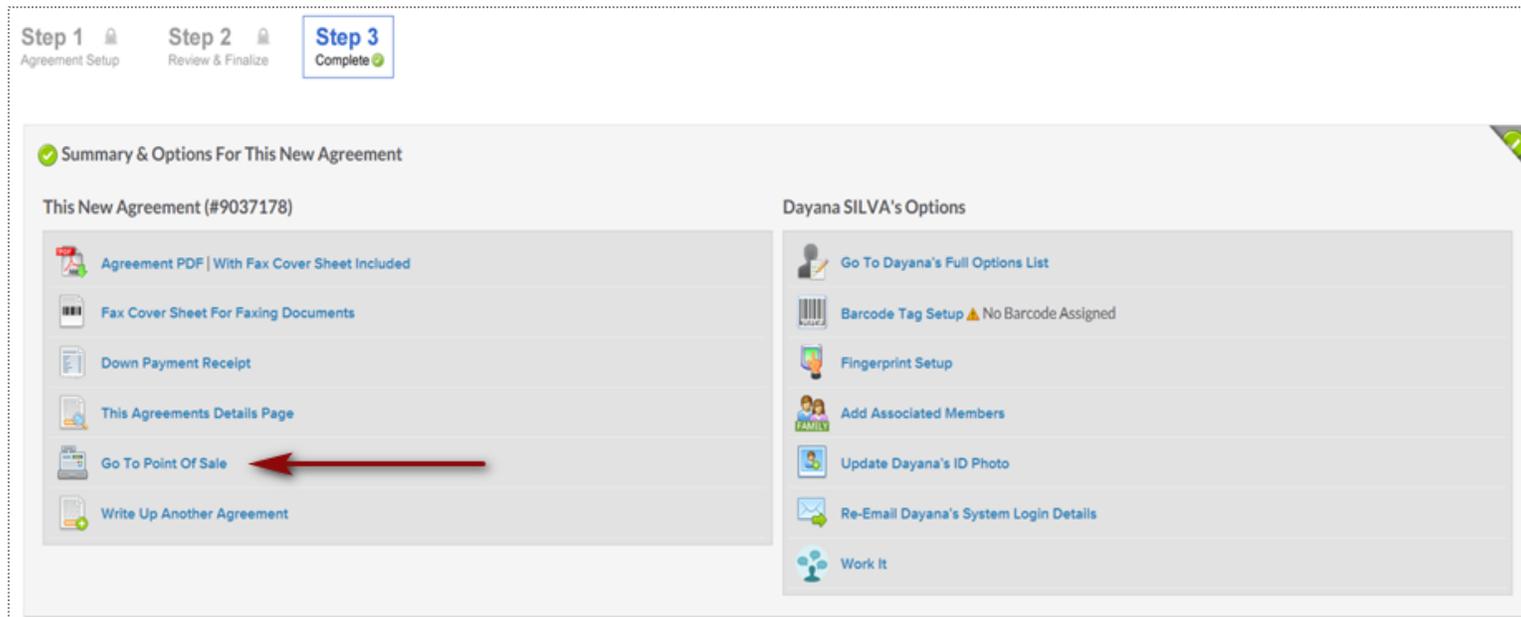
Select **AT POS** to continue the process and collect payment.

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



Step 1 Agreement Setup Step 2 Review & Finalize **Step 3 Complete**

✓ Summary & Options For This New Agreement

This New Agreement (#9037178)

- Agreement PDF | With Fax Cover Sheet Included
- Fax Cover Sheet For Faxing Documents
- Down Payment Receipt
- This Agreements Details Page
- Go To Point Of Sale** ←
- Write Up Another Agreement

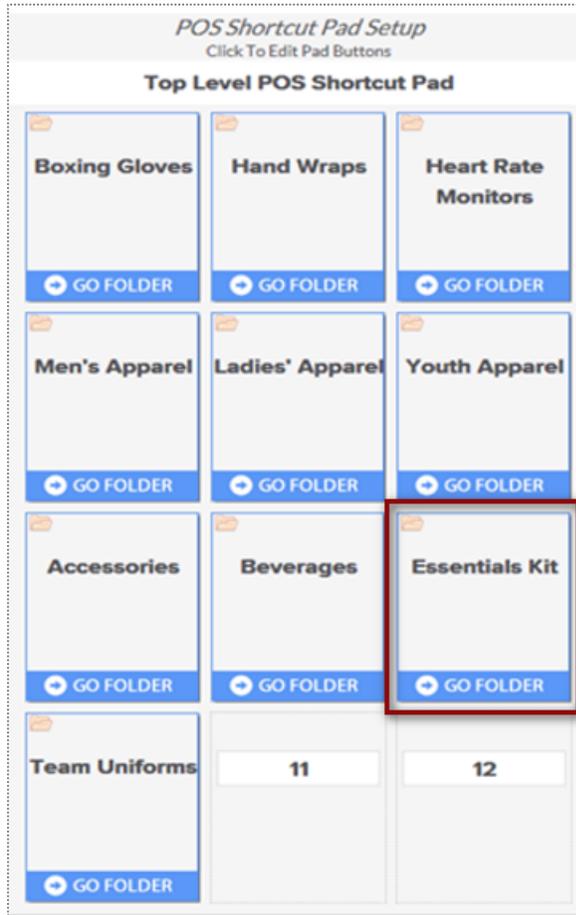
Dayana SILVA's Options

- Go To Dayana's Full Options List
- Barcode Tag Setup ⚠ No Barcode Assigned
- Fingerprint Setup
- Add Associated Members
- Update Dayana's ID Photo
- Re-Email Dayana's System Login Details
- Work It

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

Update Remove Item Cancel

Monthly Unlimited (PreSale Special)

1 0.00 \$0.00

Original Price \$99.00

enter a note (at least 10 characters)...

Item	Quantity	Taxable	Price	Extended Price
Monthly Unlimited (PreSale Special) Due 8/6/2019	1	-	\$0.00	\$0.00

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.

BALANCE DUE

\$99.99

 **ADD**

1 2 3
4 5 6
7 8 9
0 .

EXACT

CLEAR **BILLS**

Cash Tended
\$0.00

CHANGE

\$0.00

[POS setup](#)
[my permissions](#)


Sale Assigned To 

Item	Quantity	Price
Monthly Unlimited (PreSale Special) Due 8/6/2019 12:00:00 AM	1	\$0.00
Boxing Glove- Black SM/MD	1	\$99.99
Gel Shock Quick Wraps- Black SM/MD	1	\$0.00
Heart Rate Monitor-Scosche	1	\$0.00
Mayweather Ladies Location Tee	1	\$0.00
Item Total		\$99.99
Sub Total		\$99.99
Sales Tax		\$0.00
Order Total		\$99.99
Change Due		\$0.00

Add Payments

 **CARD**

 **EXTERNAL**

 **CHECK**

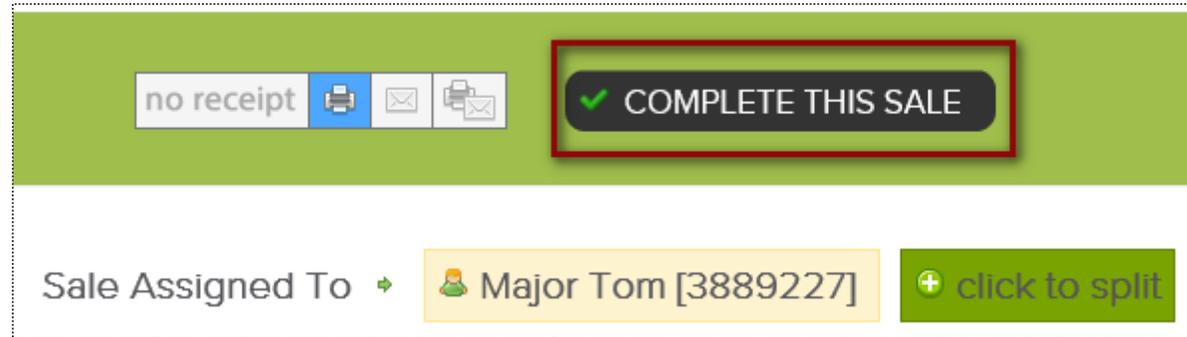
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

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.



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

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

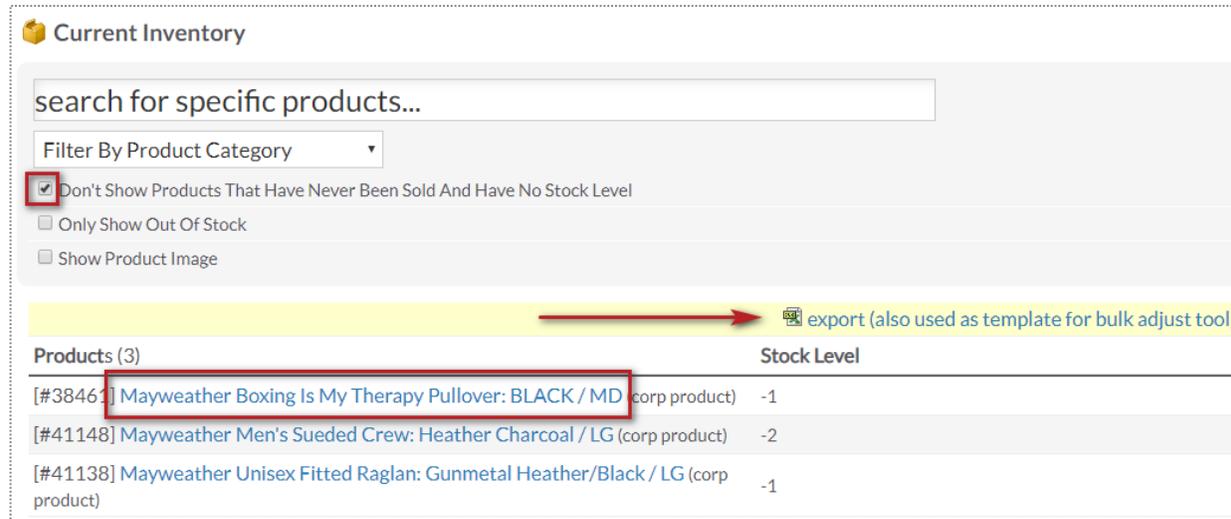
The file will be uploaded and inspected. If it is in the correct format and ready to be processed you can click on **Do Bulk Adjustment**.

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.



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)

Products (3)	Stock Level
[#38461] Mayweather Boxing Is My Therapy Pullover: BLACK / MD (corp product)	-1
[#41148] Mayweather Men's Sueded Crew: Heather Charcoal / LG (corp product)	-2
[#41138] Mayweather Unisex Fitted Raglan: Gunmetal Heather/Black / LG (corp product)	-1

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.



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.

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 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.



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>



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

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.

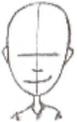
Complete the registration information and you will receive an email confirmation you have been registered to attend.

Working Tasks

Access the Work It

Prospects/Members tab > Tasks

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

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

 **Mr Customer** ⚠️ | Send SMS to client | Tracy T | 11/14/2016 | No Priority ❌

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	Past Calls (0)	Key Note (0)	All Notes (8)	Lead Type History
Home number	(123) 456-7890	Last Call	none yet		
Work number	Unknown	Last Talked With	never by phone		
		Calls Last 30 Days	none		

Select The Outcome Of The Call hide any with no phone conversation

enter details of call..

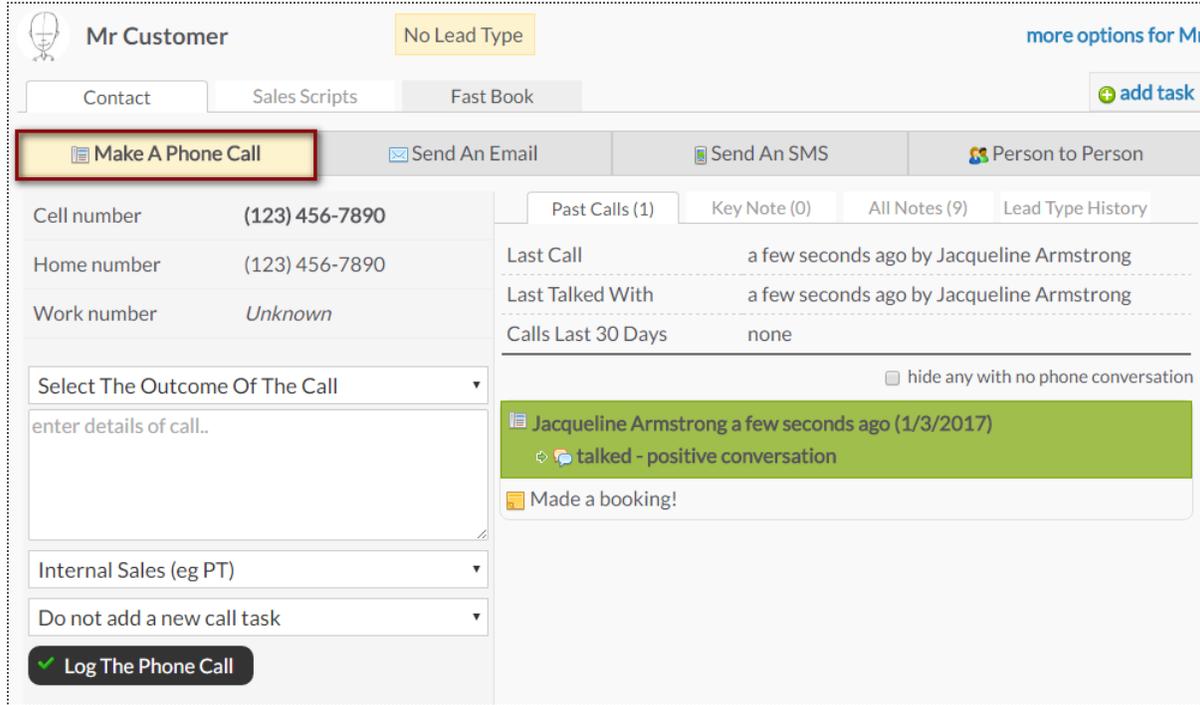
Internal Sales (eg PT)

Do not add a new call task

Log The Phone Call

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

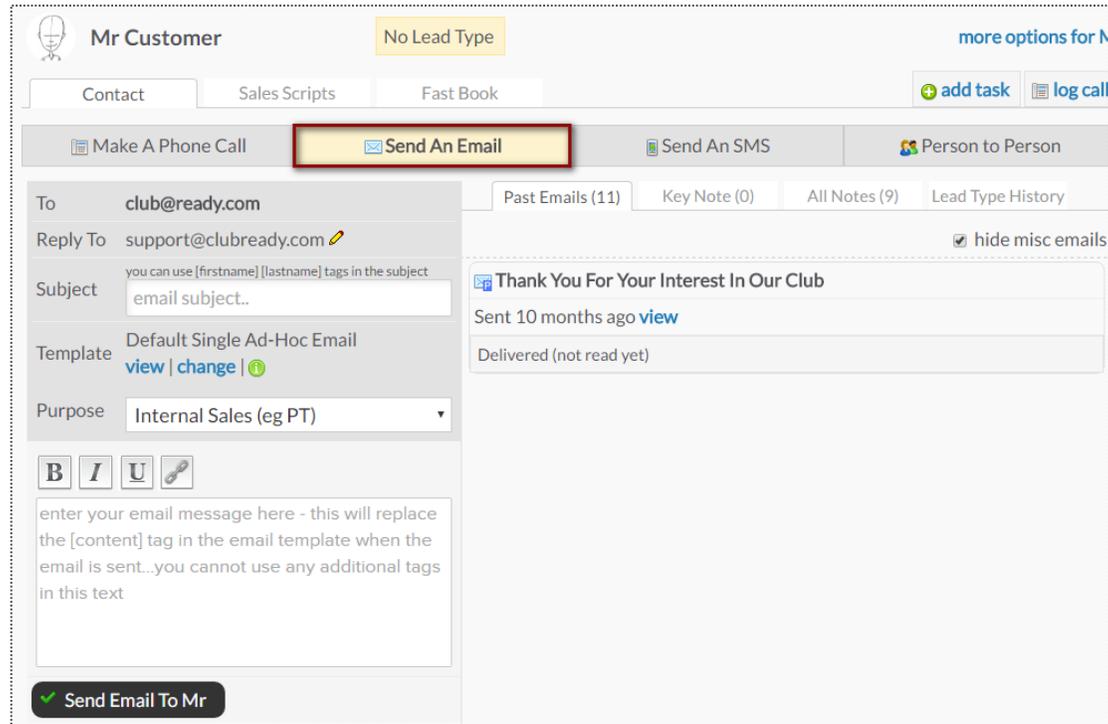


The screenshot displays a CRM interface for a customer named "Mr Customer". The "Make A Phone Call" tab is highlighted with a red border. The interface is divided into several sections:

- Contact Information:** Cell number (123) 456-7890, Home number (123) 456-7890, Work number *Unknown*.
- Call History:** Last Call (a few seconds ago by Jacqueline Armstrong), Last Talked With (a few seconds ago by Jacqueline Armstrong), Calls Last 30 Days (none).
- Call Log:** A list of call events, including "Jacqueline Armstrong a few seconds ago (1/3/2017) talked - positive conversation" and "Made a booking!".
- Form Fields:** "Select The Outcome Of The Call" dropdown, "enter details of call." text area, "Internal Sales (eg PT)" dropdown, and "Do not add a new call task" dropdown.
- Buttons:** "Log The Phone Call" button with a green checkmark icon.

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



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

To club@ready.com Past Emails (11) Key Note (0) All Notes (9) Lead Type History

Reply To support@clubready.com [✎](#) hide misc emails

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

Template Default Single Ad-Hoc Email [view](#) | [change](#) | [i](#)

Purpose Internal 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)

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

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](#)

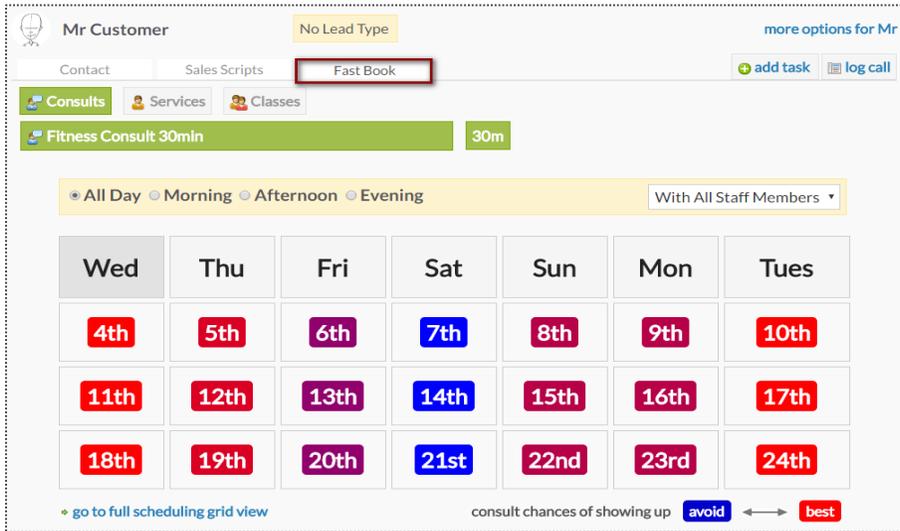
Contact Sales Scripts **Fast Book** [+ add task](#) [log call](#)

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

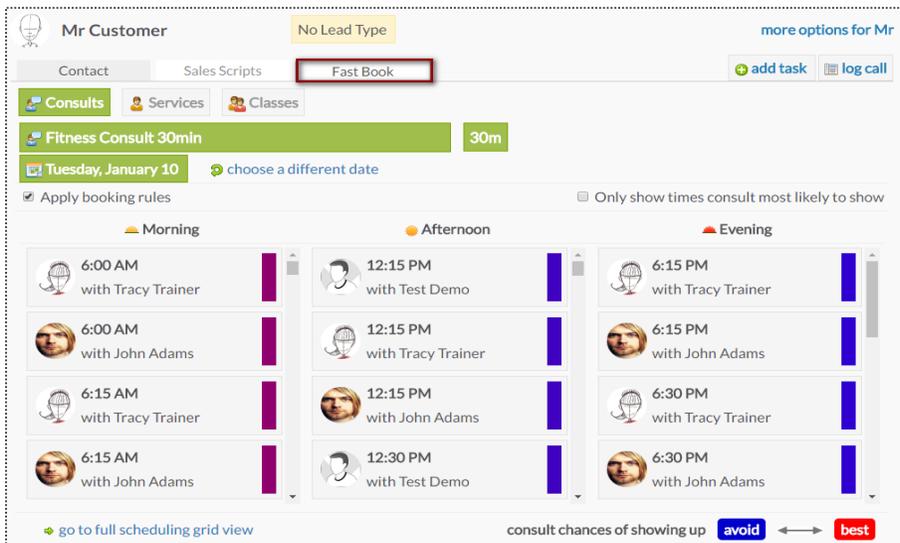
Fitness Consult 30min | 30m

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

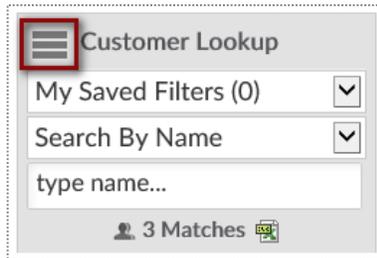
Morning	Afternoon	Evening
6:00 AM with Tracy Trainer	12:15 PM with Test Demo	6:15 PM with Tracy Trainer
6:00 AM with John Adams	12:15 PM with Tracy Trainer	6:15 PM with John Adams
6:15 AM with Tracy Trainer	12:15 PM with John Adams	6:30 PM with Tracy Trainer
6:15 AM with John Adams	12:30 PM with Test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

go to full scheduling grid view | consult chances of showing up | avoid | best



Email Blasts

Prospects/Members > Email



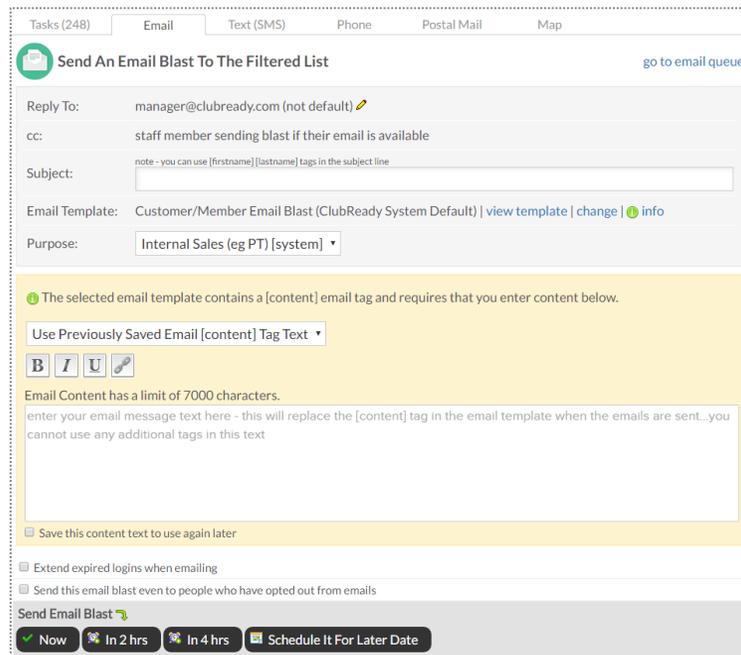
Customer Lookup

My Saved Filters (0) ▼

Search By Name ▼

type name...

3 Matches 



Tasks (248) | Email | Text (SMS) | Phone | Postal Mail | Map

 Send An Email Blast To The Filtered List [go to email queue](#)

Reply To: manager@clubready.com (not default) 

cc: staff member sending blast if their email is available

Subject:

Email Template: Customer/Member Email Blast (ClubReady System Default) | [view template](#) | [change](#) | [info](#)

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

 The selected email template contains a [content] email tag and requires that you enter content below.

Use Previously Saved Email [content] Tag Text ▼

B *I* U 

Email Content has a limit of 7000 characters.

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

Save this content text to use again later

Extend expired logins when emailing

Send this email blast even to people who have opted out from emails

Send Email Blast 

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:

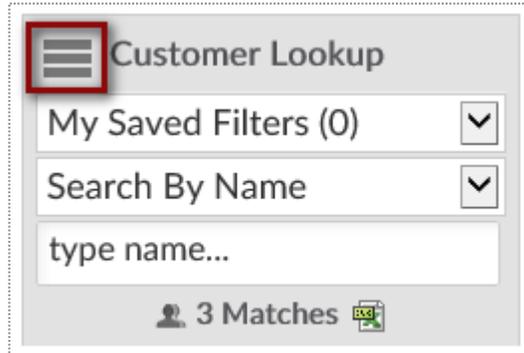
Save this content text to use again later - If you are going to send this out on a regular basis.

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)



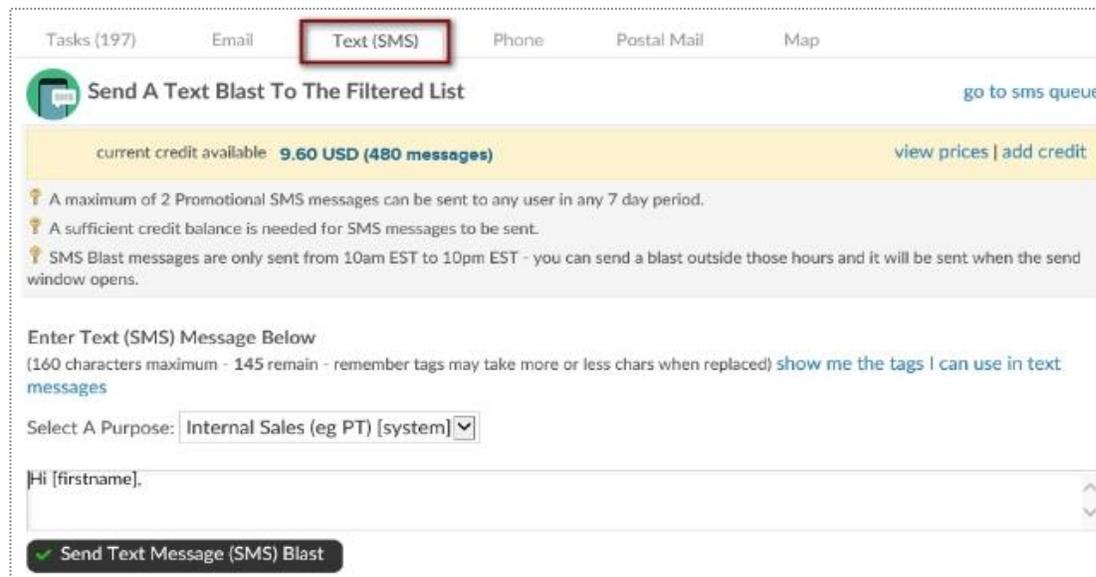
Customer Lookup

My Saved Filters (0) ▼

Search By Name ▼

type name...

3 Matches 



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:

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.

Automated Emails

Setup > Communications > System Emails

Emails Related To		Prospects
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off	Default New Prospect Email 
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off	Friends & Family Referrals  <small>(not implemented yet - fix)</small>
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off	Default Prospect Automation Emails 

Emails Related To		Staff Initiated Email Blasts / Messages
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off	Ad-hoc Single Email Send 
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off	Default Prospect Email Blasts 
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off	Default Member Email Blasts 
<input checked="" type="checkbox"/> On	<input type="checkbox"/> Off	Default Past Due Email Blasts 

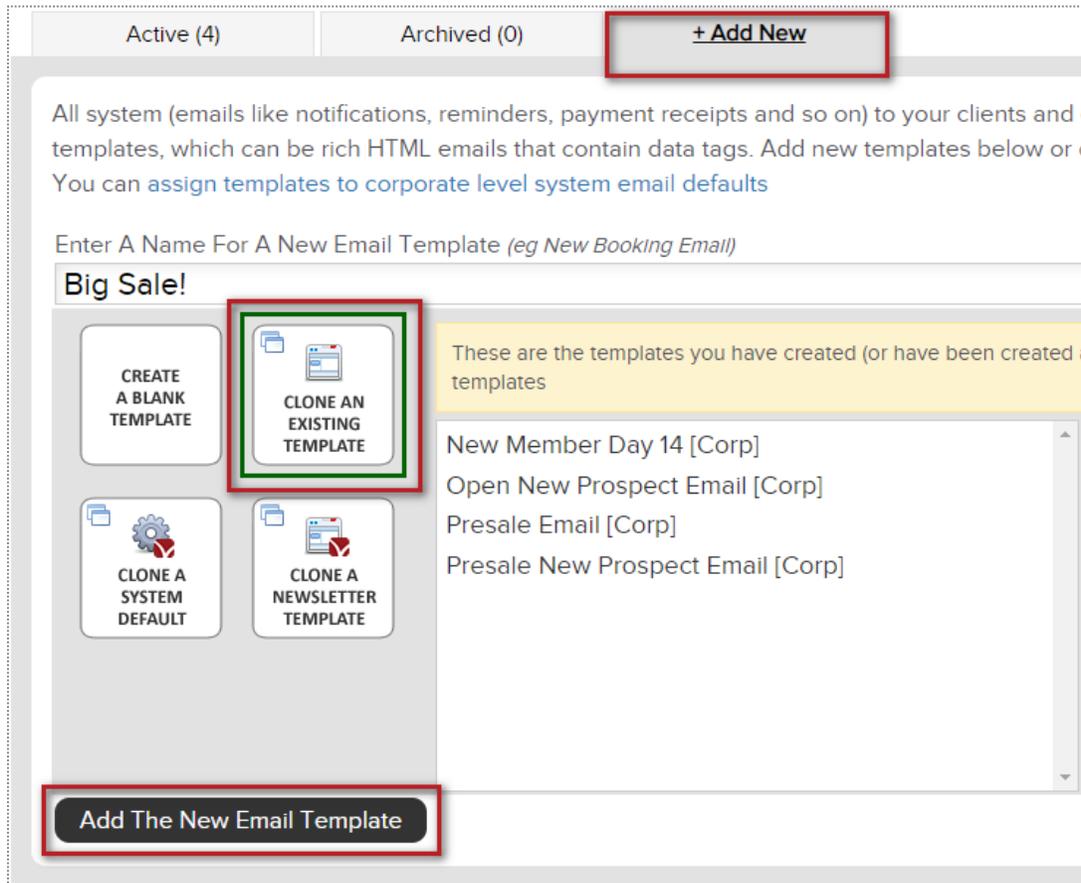
Default Email Reply To Address	<input type="text" value="don@mayweather.fit"/>
Email And Reply To Address Options <small>(default will be used if other options are not possible due to lack of email address etc)</small>	<input checked="" type="radio"/> Always send from default from address <input type="radio"/> Send from assigned sales consultant <input type="radio"/> Send from default but cc assigned sales consultant
⚠ Any template used by this email type <u>must</u> 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 view add new	<input type="text" value="Prospect Email Blast [System Default]"/>
Optional Email Attachment	No Attachment 
<input checked="" type="checkbox"/> Update This Email Type	
<input type="text" value="manager@mayweather.com"/>	
<input type="button" value="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.

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.

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)

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

Mayweather'. At the bottom is a black footer bar with white text: '[locationname] [locationaddress] [locationphonenumber] ©Mayweather Boxing & Fitness [currentyear] | [unsubscribe]'." data-bbox="76 241 519 891"/>

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.



Invoice Adjustments

Member > Billing > Invoices > Edit Pencil

6/4/2017 \$9.95 #76423266 Base Monthly   Due on 6/4/2017 Membership

#76423266 Adjust Invoice For Mr Customer
\$9.95 / Base Monthly / Due 6/4/2017

Options For Adjusting This Invoice

Automatically Draft This Invoice When Due
 Yes No
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 \$	<input type="text" value="9.95"/>
	No Sales Taxes ▾ \$ <input type="text"/>
Due Date	<input type="text" value="6/4/2017"/>

Change Package Type

Optional Note

or cancel

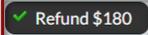
Selecting the option **Adjust The Invoice Details** will update the screen to display all options you can adjust for this one invoice. Make the desired changes to the invoice. Click the **Update** button to save changes.

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.

#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 <i>credits will be automatically deleted</i>
Optional Note	<input type="text"/>
 or cancel	

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

+ 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**

Adding a New Invoice

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

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



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		\$720.00 + \$50.00 in Fees (#4265319) 6 x 1xWeek 30 Minutes PT agr927-4077574-9193306-c1934-sg2069 ELECTRONIC SIGNATURE	
-----------	--	--	--

- 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**

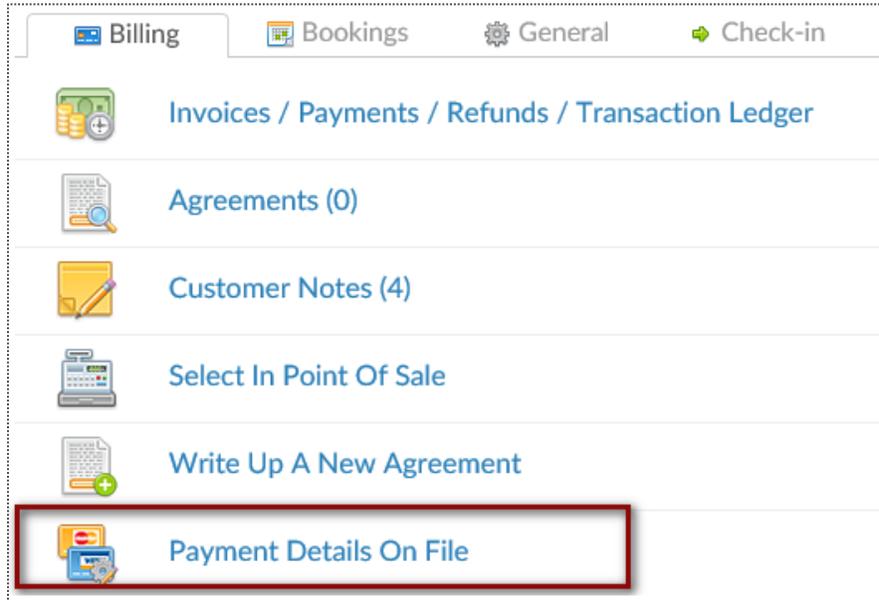
Cancel This Agreement Effective Immediately: This agreement will be cancelled today. All unpaid invoices will be cancelled.

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

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



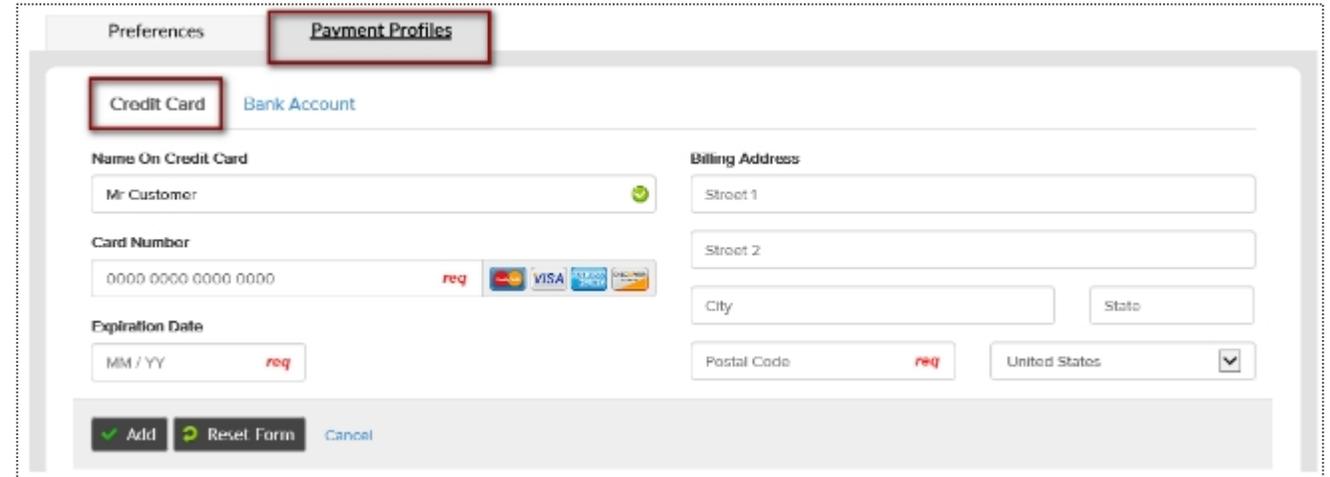
The screenshot shows a navigation menu with the following items:

- Billing
- Bookings
- General
- Check-in

Below the navigation menu are several menu items:

- 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)

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** form with the **Credit Card** tab selected. The form contains the following fields:

- Name On Credit Card:** Mr Customer
- Card Number:** 0000 0000 0000 0000
- Expiration Date:** MM / YY
- Billing Address:** Street 1, Street 2, City, State, Postal Code, United States

Buttons at the bottom: **Add**, **Reset Form**, **Cancel**

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

This screenshot shows the top navigation bar of the member profile page. It includes tabs for 'Detail', 'Agreements (1)', 'Bookings (0)', 'Notes (4)', 'Files (1)', 'Tasks (1)', and 'Past 30 Days'. Below the tabs is a profile card for 'Mr Customer [9679922] Male' with amenities: 'Amenities Cross-Club Access, Tanning, Towel Service, Childcare'. At the bottom is a row of icons for 'WORK IT', 'GO POS', 'NEW DEAL', 'BILLING', 'BOOKINGS', 'PRESENT', 'PROFILE' (highlighted with a red box), 'WELLNESS', 'LOGIN AS', 'ALL DETAIL', and 'LEAD HIST.'.

This screenshot shows the 'Edit Member Profile' form for 'Mr Customer'. It includes a 'GO BACK' button and a 'Click To Update' button. The form is divided into two sections: 'General Details' and 'Emergency Contact Information'. The 'General Details' section contains fields for 'Login Active Until' (with a 'No time limit' checkbox and a calendar icon), 'Customer Type' (dropdown: No Assignment), 'Referred How' (dropdown: Unknown), 'Referred by Customer' (checkbox: search across all locations), 'External User ID', 'Gender' (dropdown: Male), 'Date of Birth' (calendar: (3) March 31 1979), 'Cell Phone', 'Phone' (554) 554-5544, 'Work Phone', 'Email Address' (mrcustomer@clubready.com), and 'Drivers License #'. The 'Emergency Contact Information' section contains fields for 'Contact Name', 'Contact Phone', and 'Relationship' (with an example: Spouse).

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 <i>(Optional)</i>	<input type="text"/>

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.

Add a Photo

Prospects > Select Prospect Account > Green Plus Sign

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

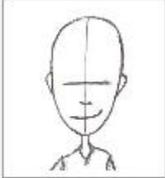


Mr Customer [18351389] Male
Amenities None

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)

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

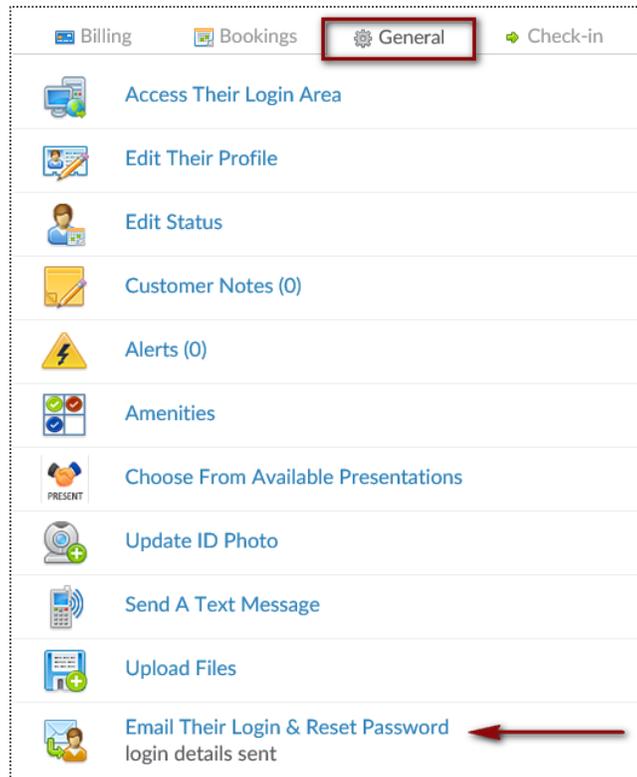
Member Account > All Detail > General > Email Their Login & Reset Password



Detail | Agreements (1) | Bookings (0) | Notes (0) | 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.



Billing | Bookings | **General** | Check-in

-  Access Their Login Area
-  Edit Their Profile
-  Edit Status
-  Customer Notes (0)
-  Alerts (0)
-  Amenities
-  Choose From Available Presentations
-  Update ID Photo
-  Send A Text Message
-  Upload Files
-  **Email Their Login & Reset Password**
login details sent

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 > Attendance Card

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						

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

Generate Report

export to Excel export to PDF

2 Check-ins found.

181 days ago	Saturday, July 9, 2016 8:25 AM	CR Membership Training Site [2829]
259 days ago	Friday, April 22, 2016 1:12 PM	CR Membership Training Site [2829]

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

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.



MAYWEATHER
BOXING + FITNESS

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](#)

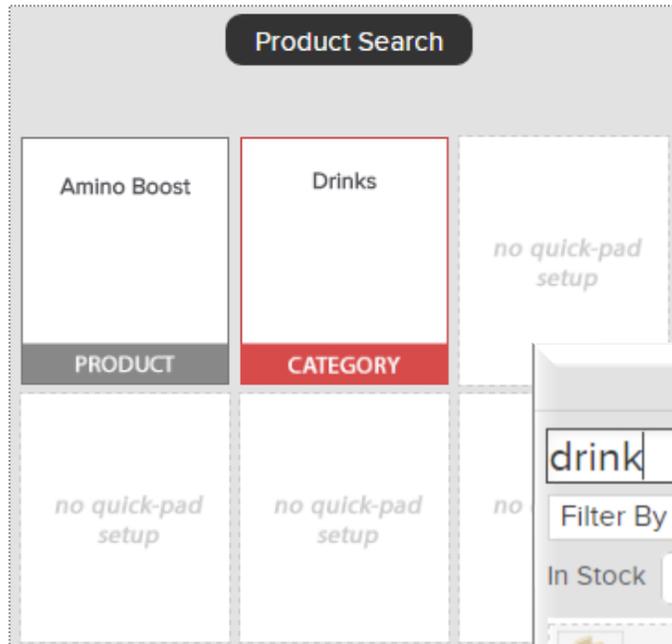
Item	Quantity	Taxable	Price	Extended Price
 Founders Unlimited Monthly Recurring Due 6/15/2018	1	-	\$89.00	\$89.00

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.

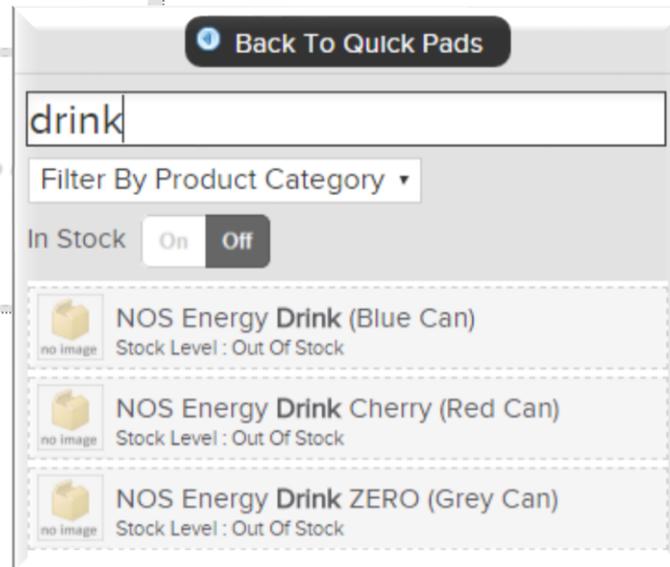
If the client has any invoices that are due, they will automatically populate in the POS shopping cart. You can also access the client's **Future Invoices** to take payment on an invoice not yet due. Any unfinished transactions can be resumed by selecting the **Incomplete Carts** button. Select **Add 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

\$15.00

Item	Quantity	Taxable	Price	Extended Price
<input type="button" value="Update"/> <input type="button" value="Remove Item"/> <input type="text" value="Assigned to Current User"/> <input type="button" value="Apply A Product Discount To \$15.00"/> <input type="button" value="Cancel"/>				
<input type="button" value="Boxing Gloves"/>	<input type="text" value="1"/>		<input type="text" value="15.00"/>	
<input type="text" value="enter a note (at least 10 characters)..."/>				

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

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.



Taking Payment

Select the appropriate payment method.

BALANCE DUE

\$15.00



+ ADD

1 2 3
4 5 6
7 8 9
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
Order Total		\$15.00
Change Due		\$0.00

Add Payments


CARD


BANK ACH


EXTERNAL


CHECK

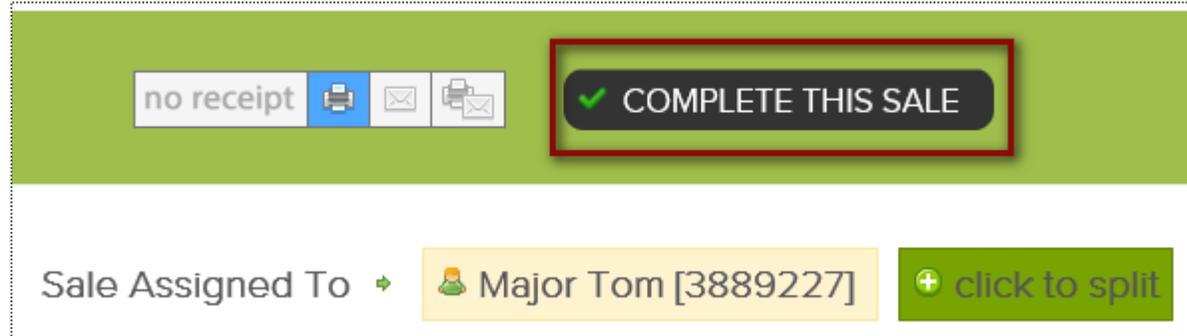
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

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.



no receipt     COMPLETE THIS SALE

Sale Assigned To →  Major Tom [3889227]  click to split

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.

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.



Scheduling

Classes: Add a Class to the Schedule

Bookings > Classes

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

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)

Duplicate This New Class [HELP](#)

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

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

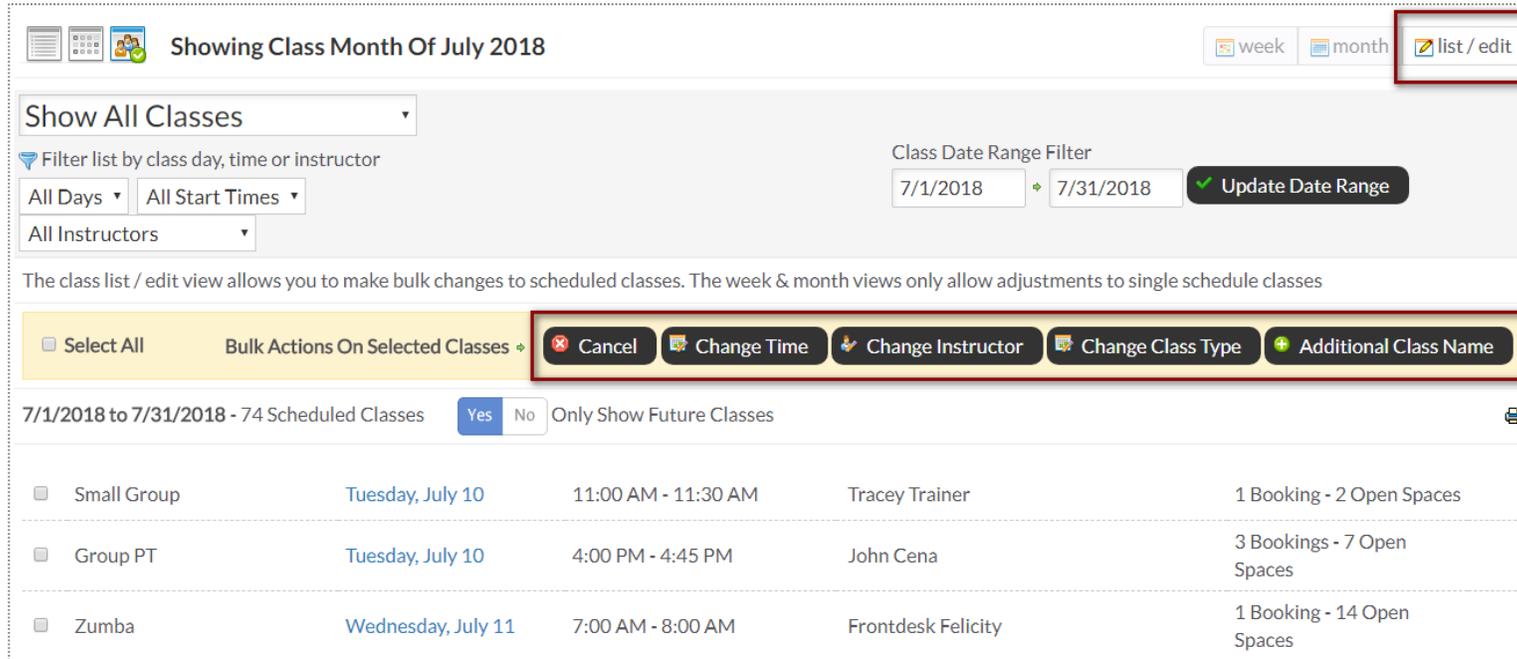
Back

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: Bulk Adjust

Bookings > Classes > list / edit



Showing Class Month Of July 2018

week month list / edit

Show All Classes

Filter list by class day, time or instructor

All Days All Start Times All Instructors

Class Date Range Filter

7/1/2018 7/31/2018 Update Date Range

The class list / edit view allows you to make bulk changes to scheduled classes. The week & month views only allow adjustments to single schedule classes

Select All Bulk Actions On Selected Classes Cancel Change Time Change Instructor Change Class Type Additional Class Name

7/1/2018 to 7/31/2018 - 74 Scheduled Classes Yes No Only Show Future Classes

<input type="checkbox"/>	Small Group	Tuesday, July 10	11:00 AM - 11:30 AM	Tracey Trainer	1 Booking - 2 Open Spaces
<input type="checkbox"/>	Group PT	Tuesday, July 10	4:00 PM - 4:45 PM	John Cena	3 Bookings - 7 Open Spaces
<input type="checkbox"/>	Zumba	Wednesday, July 11	7:00 AM - 8:00 AM	Frontdesk Felicity	1 Booking - 14 Open Spaces

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**.

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					<div style="border: 2px solid red; height: 20px; width: 100%;"></div>		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

 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 log off and a window will open with management options.

 Mr Customer [ID 2311063] **WORKIT**

 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

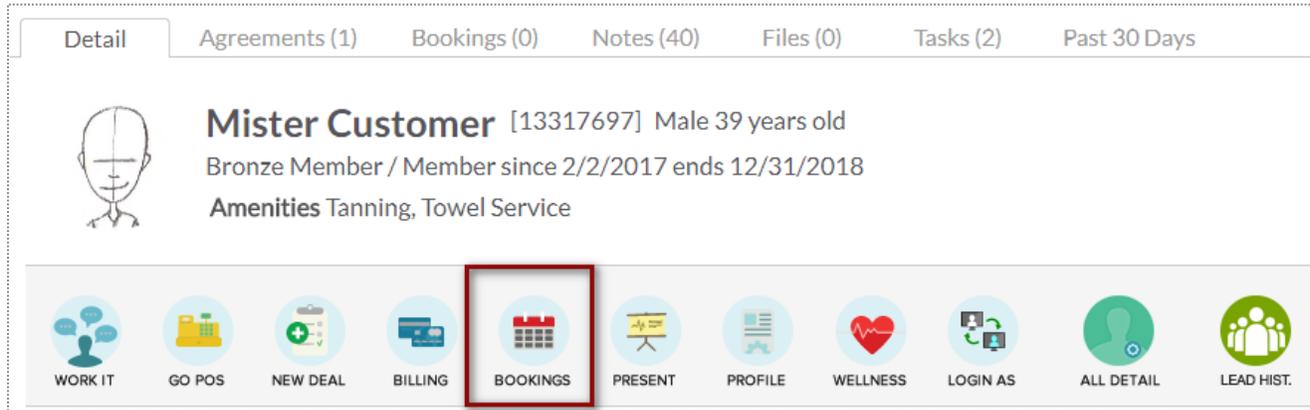
Optional Note
(Client Does Not See This Note)

Booking #40329770 Note 1/5/2017 Fitness

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.

Classes: Adding Credits to Account

Member Account > Bookings

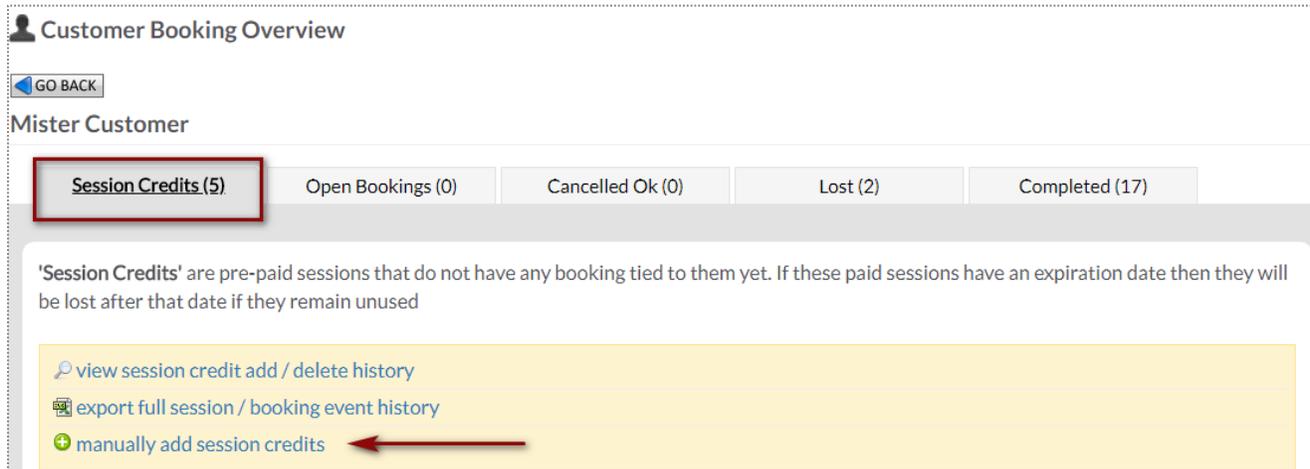


Detail | Agreements (1) | Bookings (0) | Notes (40) | Files (0) | Tasks (2) | Past 30 Days

 **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

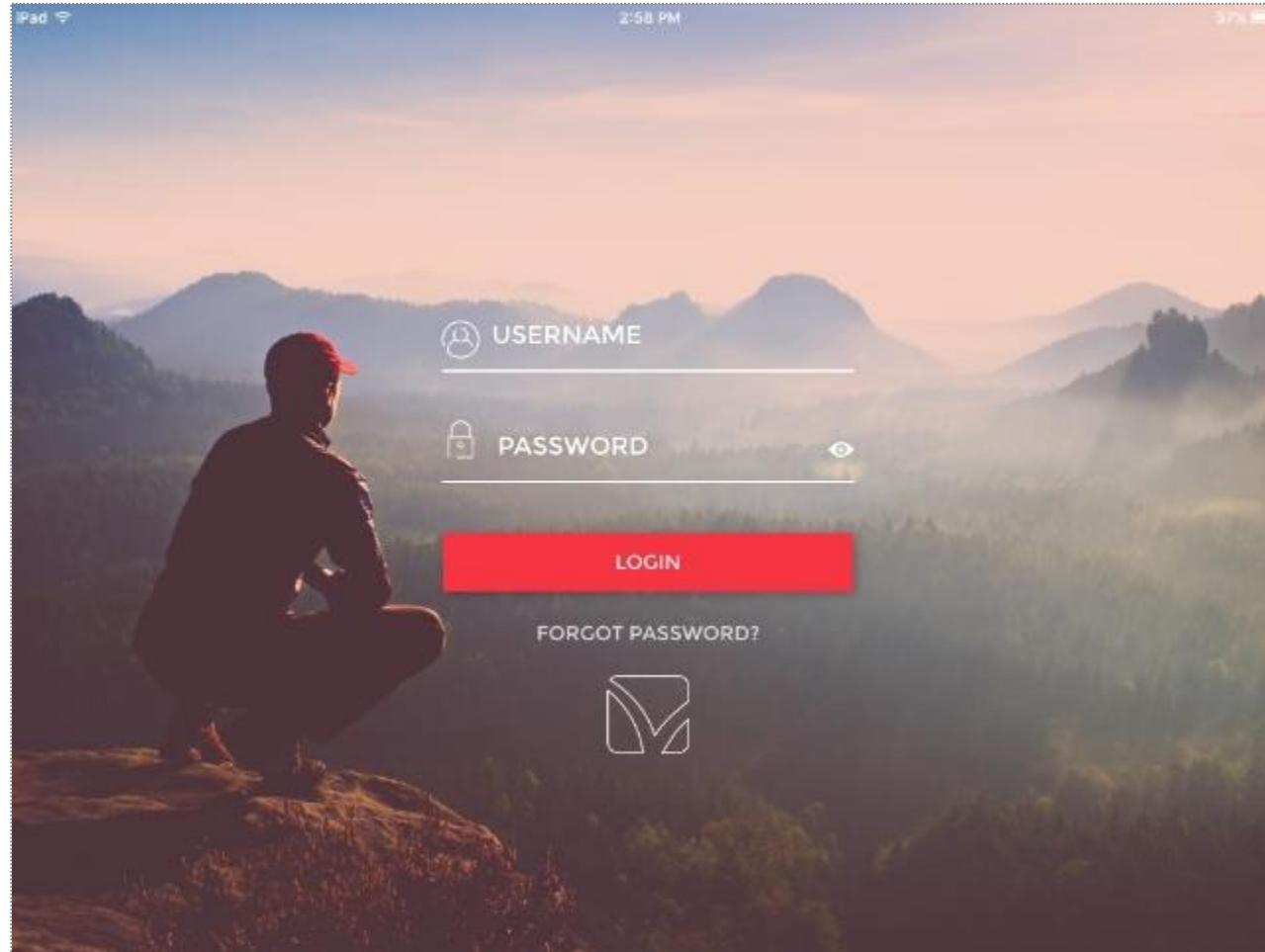
- [view session credit add / delete history](#)
- [export full session / booking event history](#)
- [manually add session credits](#) ←

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



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

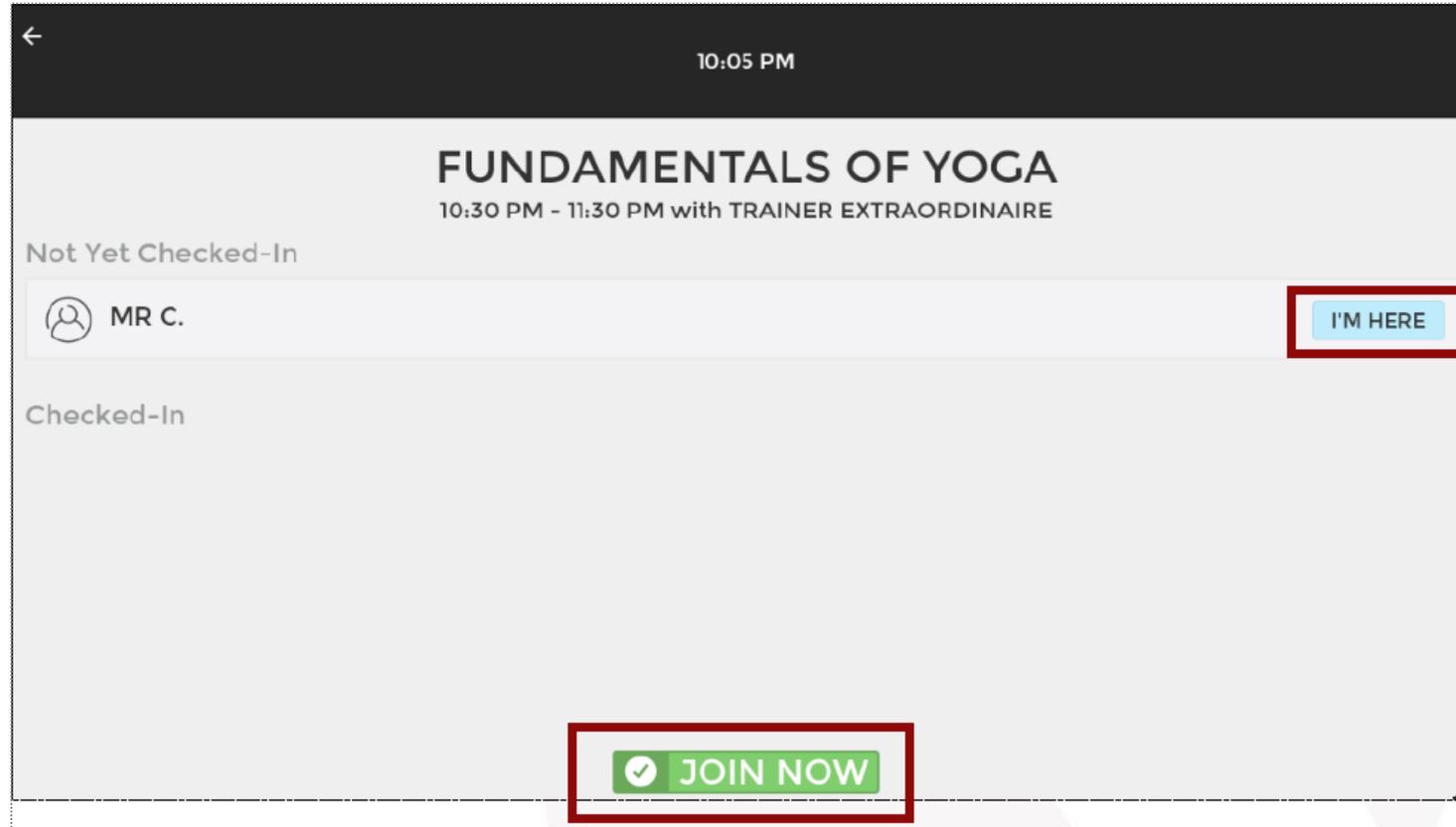
After logging in, you will see a list of all upcoming classes.





ClubReady Class Kiosk App: View Current Classes

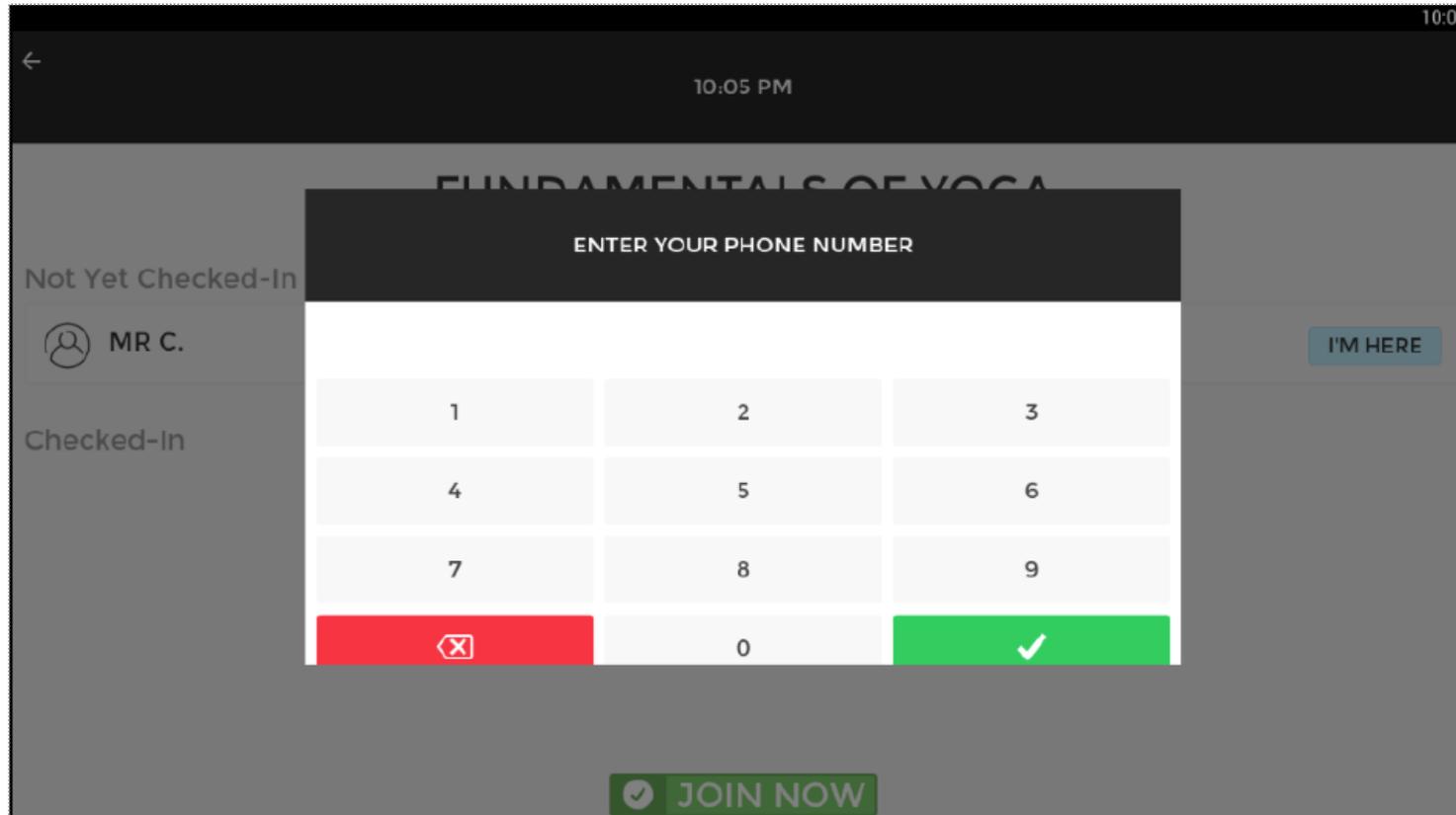
Choose to checkin an already registered member or have a new member join the class.





ClubReady Class Kiosk App: Confirm Check In

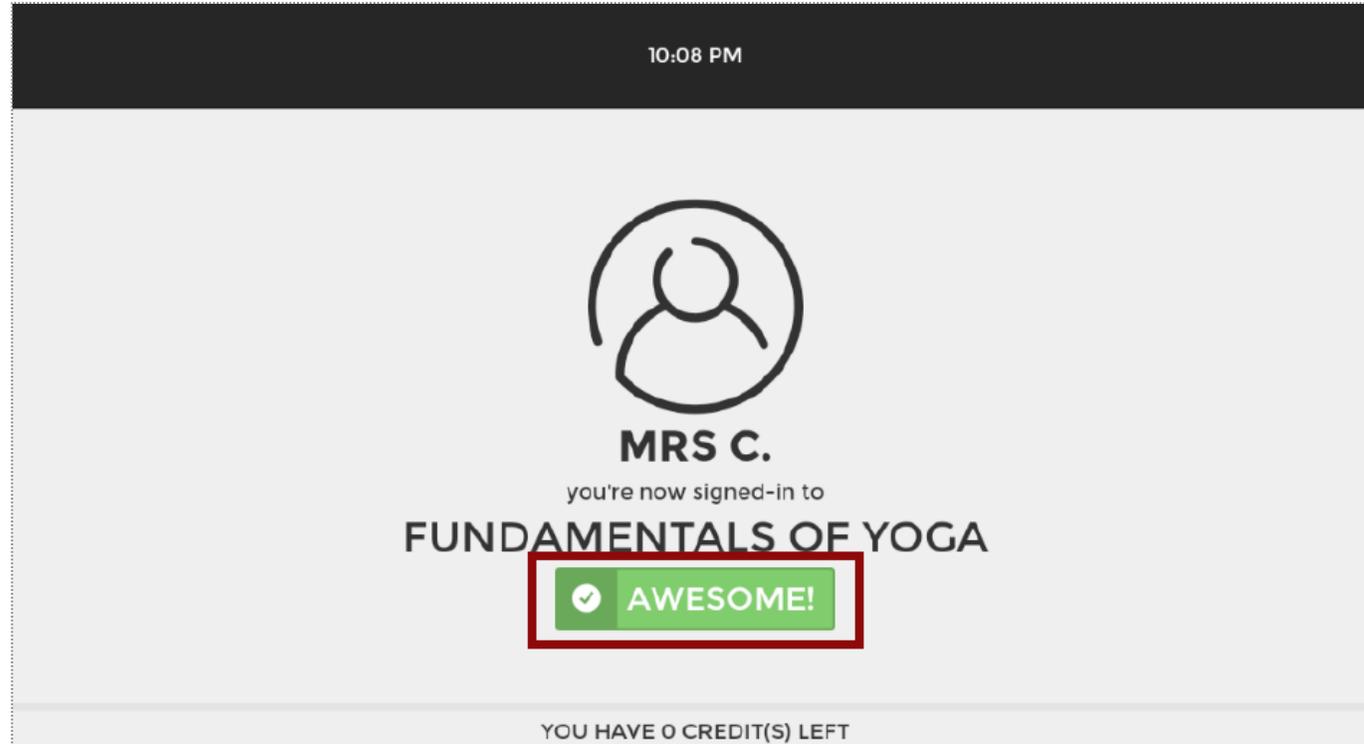
You can have your registered member enter their phone number to check in to the class.





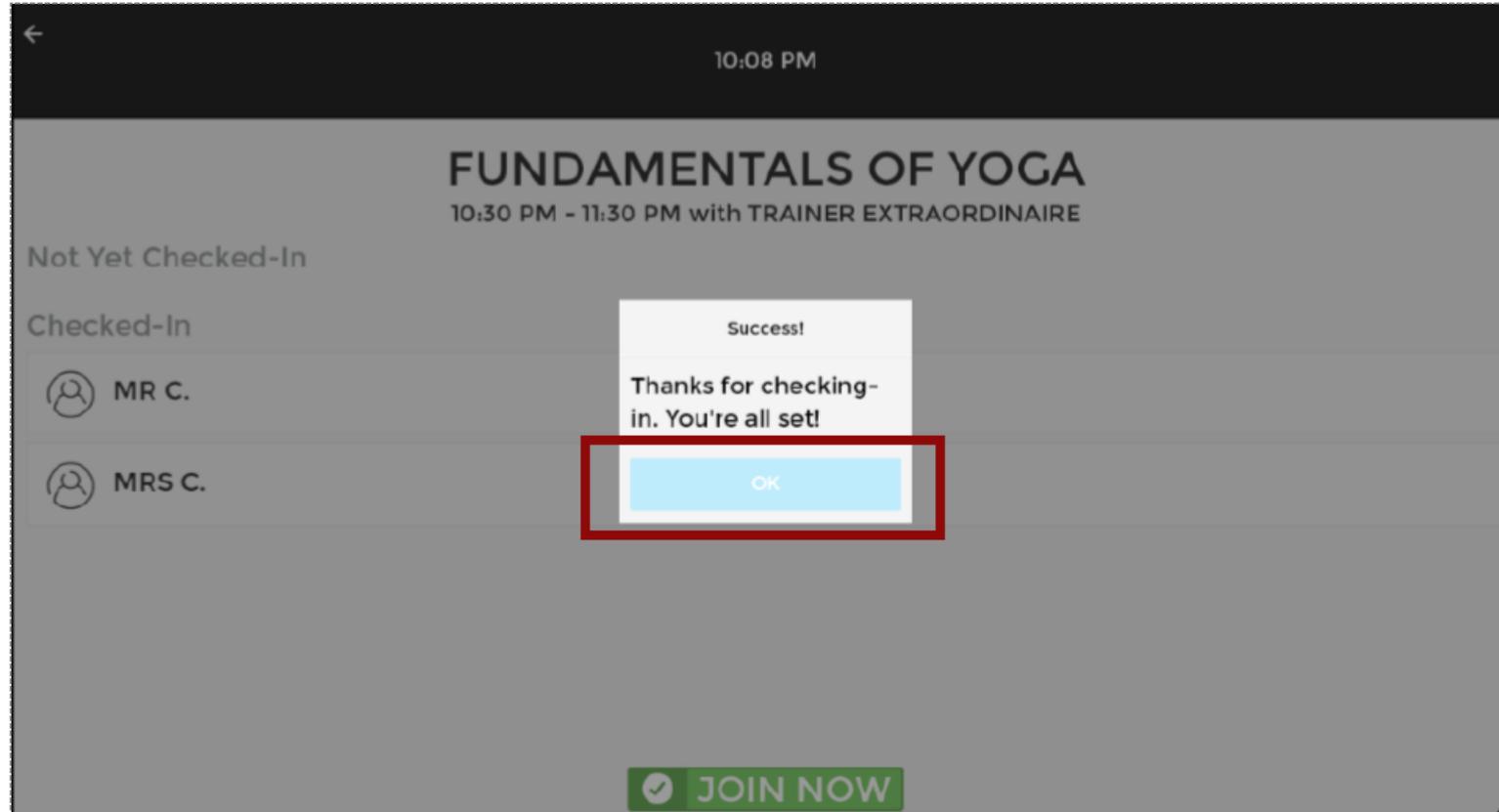
ClubReady Class Kiosk App: Making A New Class Booking

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



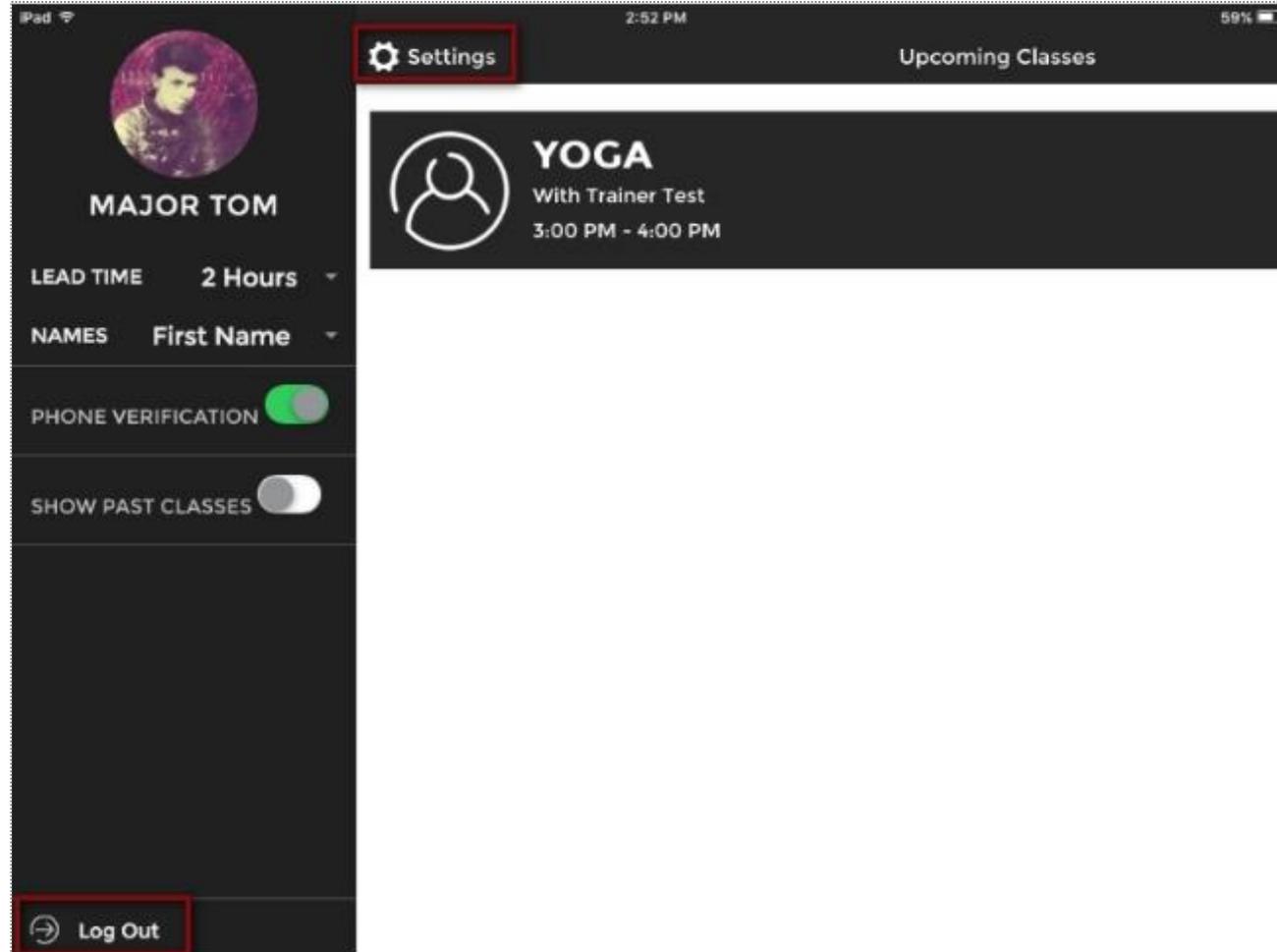
ClubReady Class Kiosk App: Successful Check In

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.





Add a Staff Member

Staff > Add A New Staff Member

Add A New Staff Member: General Details

Gender *

Date of Birth

Date of Hire (10) October 2016

Select Staff Type 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

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.



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Submit a ticket



Post on the Help Forums



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Use Live Chat



Email us for help: **support@clubready.com**