ClubReady

ClubReady Foundations for Club Pilates

User Guide

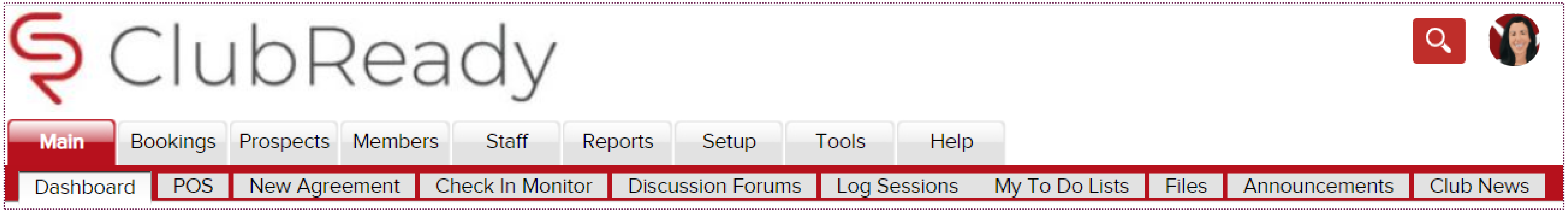
Table of Content

ClubReady Demo Site

http://www.cpdemo.clubready.com
Username: cpmanager
Password: password

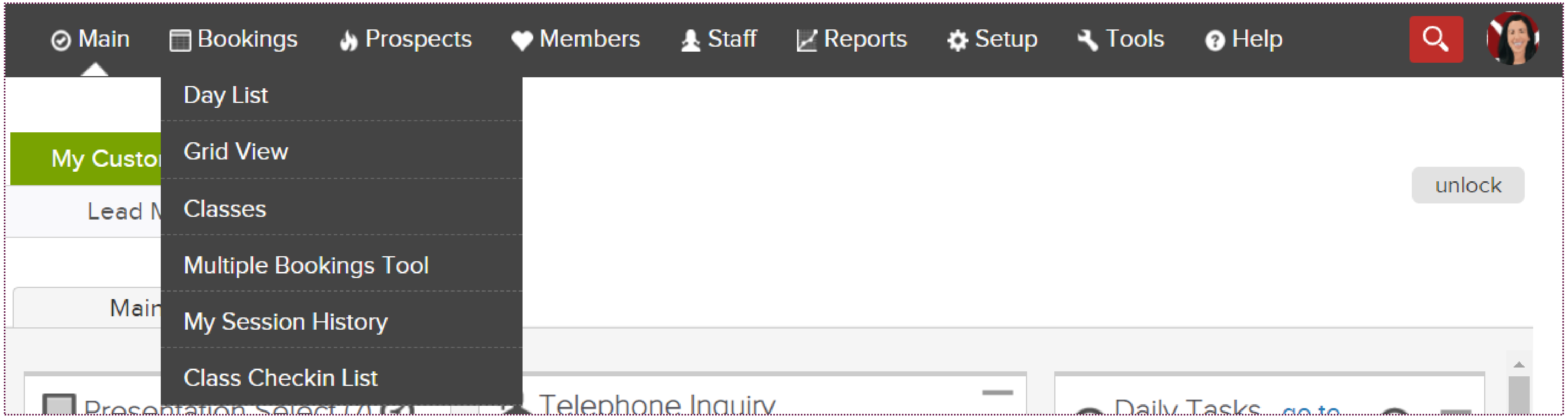
Menu & Navigation

ClubReady Menu Style: Large View



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

ClubReady Menu Style: Small View

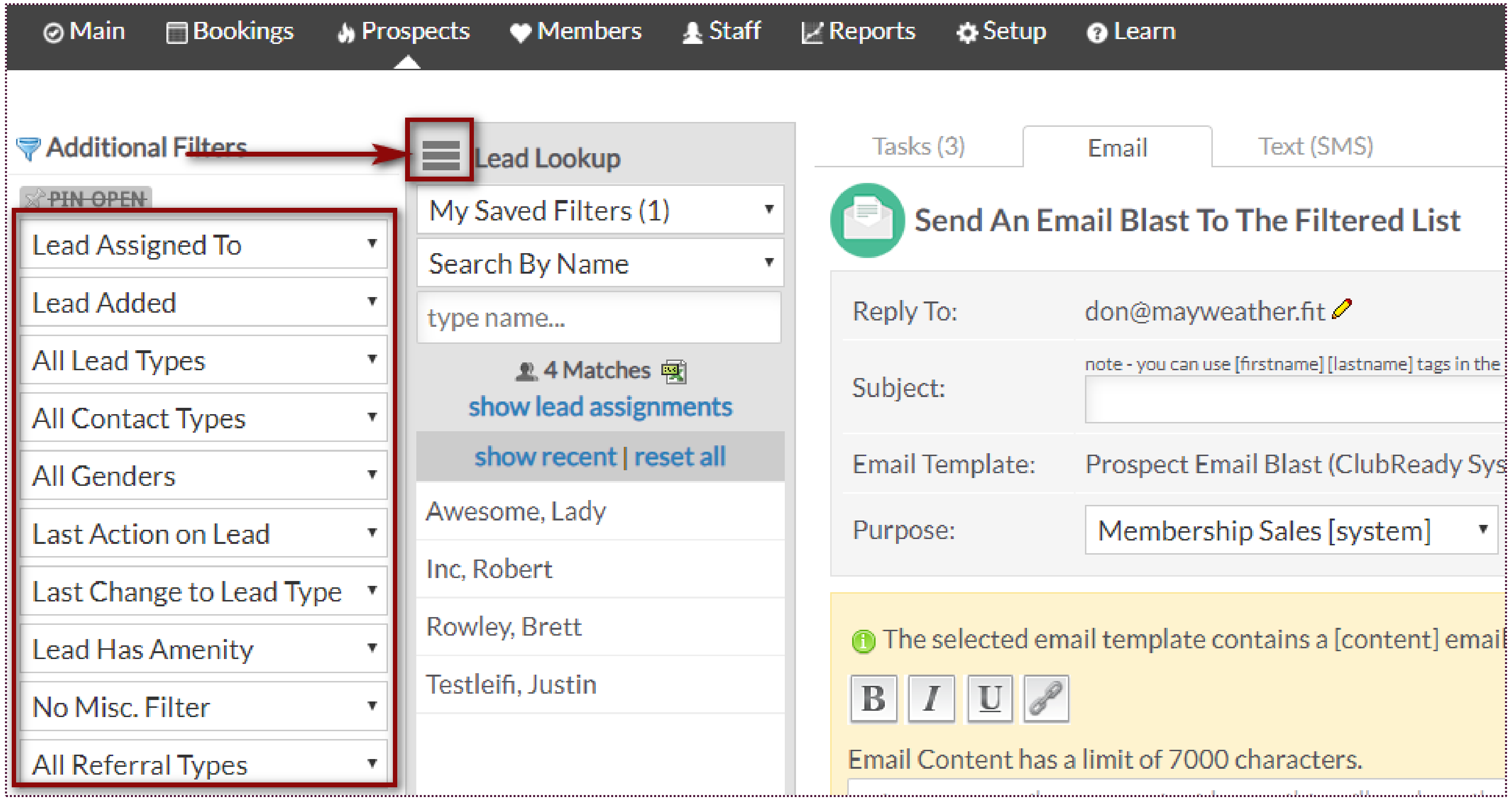


This menu style takes up less space but has no club logo. This menu style offers the same menu options, with a drop down menu's as a single menu strip along the top of the page.

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

Lookup Prospect

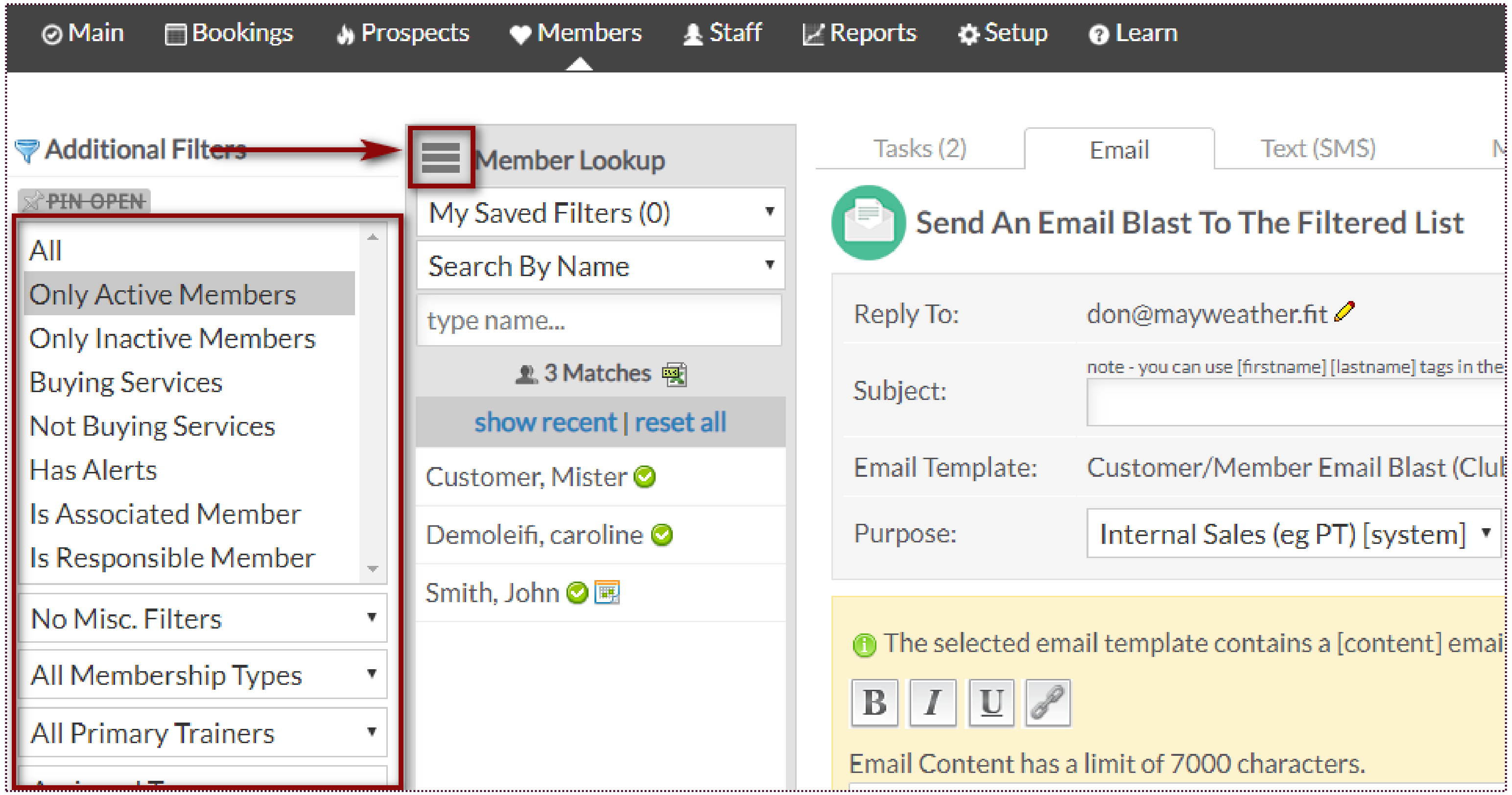
Prospects > Membership Prospects



CLUB PILATES

Lookup Members

Members > Lookup

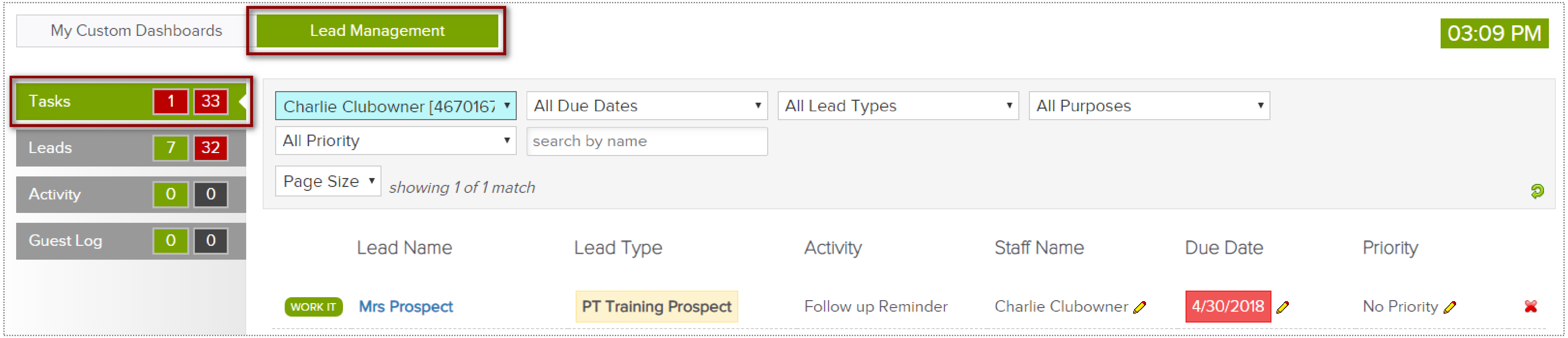


CLUB PILATES

Lead Management Dashboard

Lead Management Dashboard - Tasks

Main > Dashboard

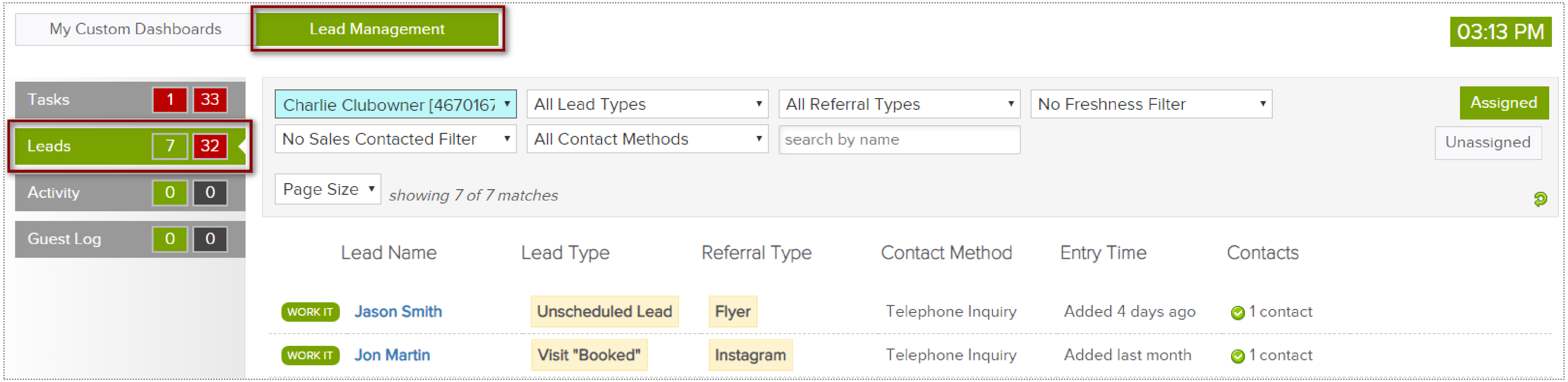


The **Tasks** tab will display all of the tasks created for membership prospects only. The number displayed to the left show tasks assigned to the staff member currently logged in. The number displayed to the right show tasks for all the club.

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.

Lead Management Dashboard - Leads

Main > Dashboard

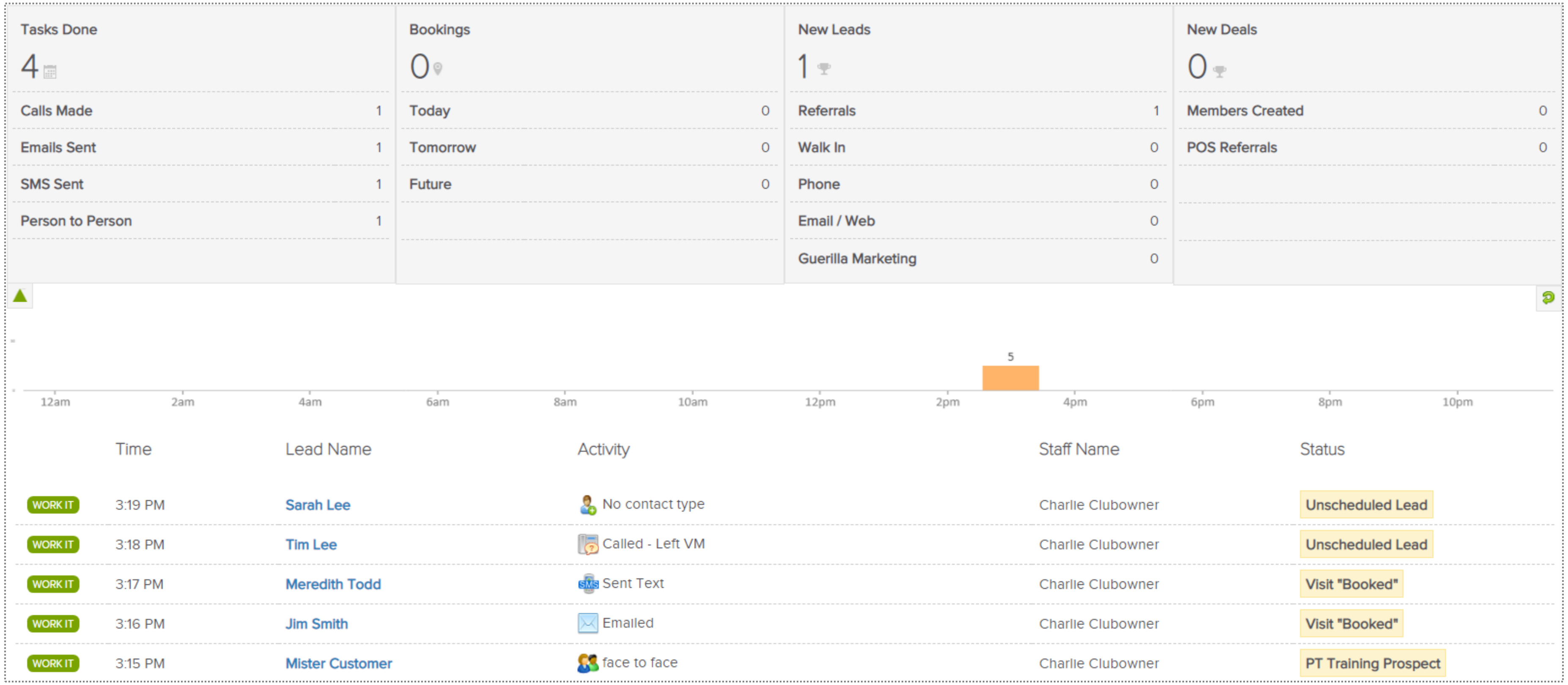


The **Leads** tab will display all of the leads added. The number displayed to the left show leads assigned to the staff member currently logged in. The number displayed to the right show all of the club's leads.

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.

Lead Management Dashboard – Activity

Main > Dashboard

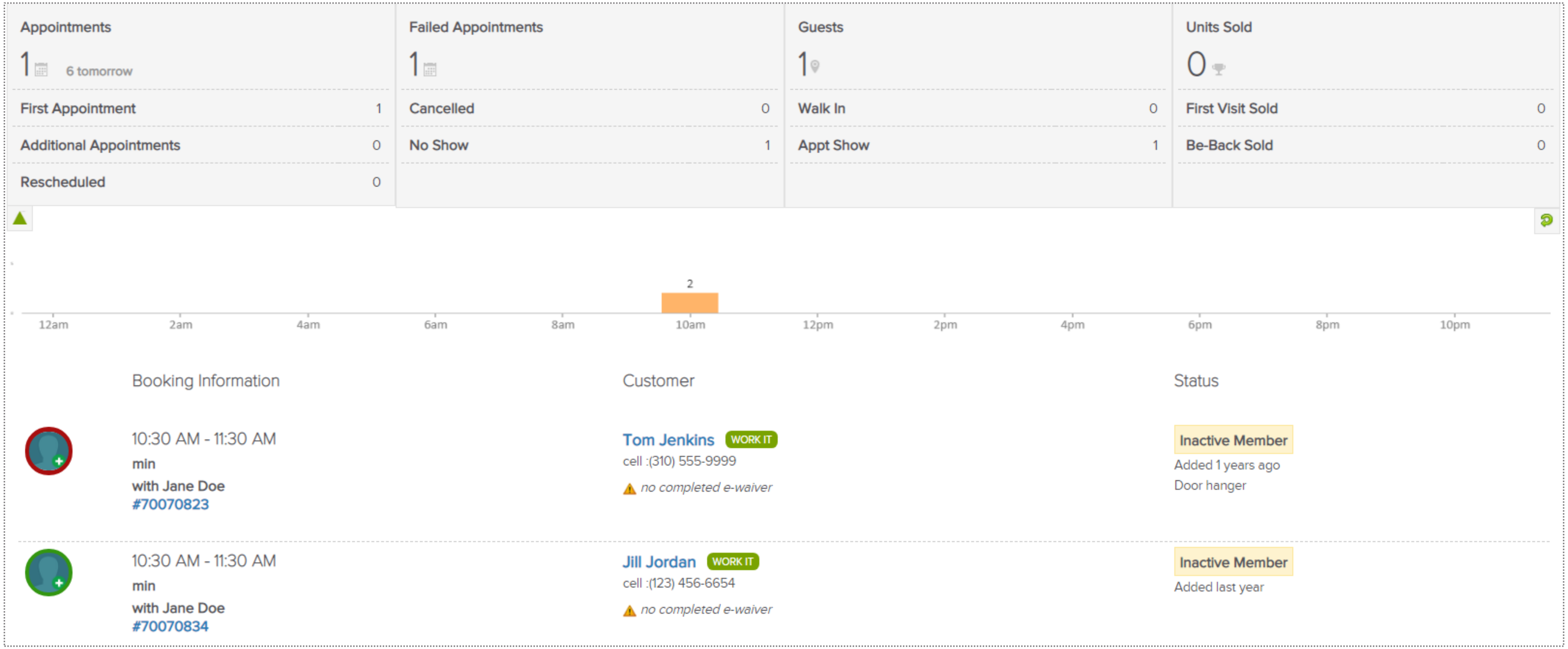


The **Activity** tab reflects current data or activity for a specific day. The report will display **Tasks Done**, **Bookings**, **New Leads** and **New Deals**. A time bar lets you know when are these activities happening throughout your club.

CLUB PILATES

Lead Management Dashboard – Guest Log

Main > Dashboard

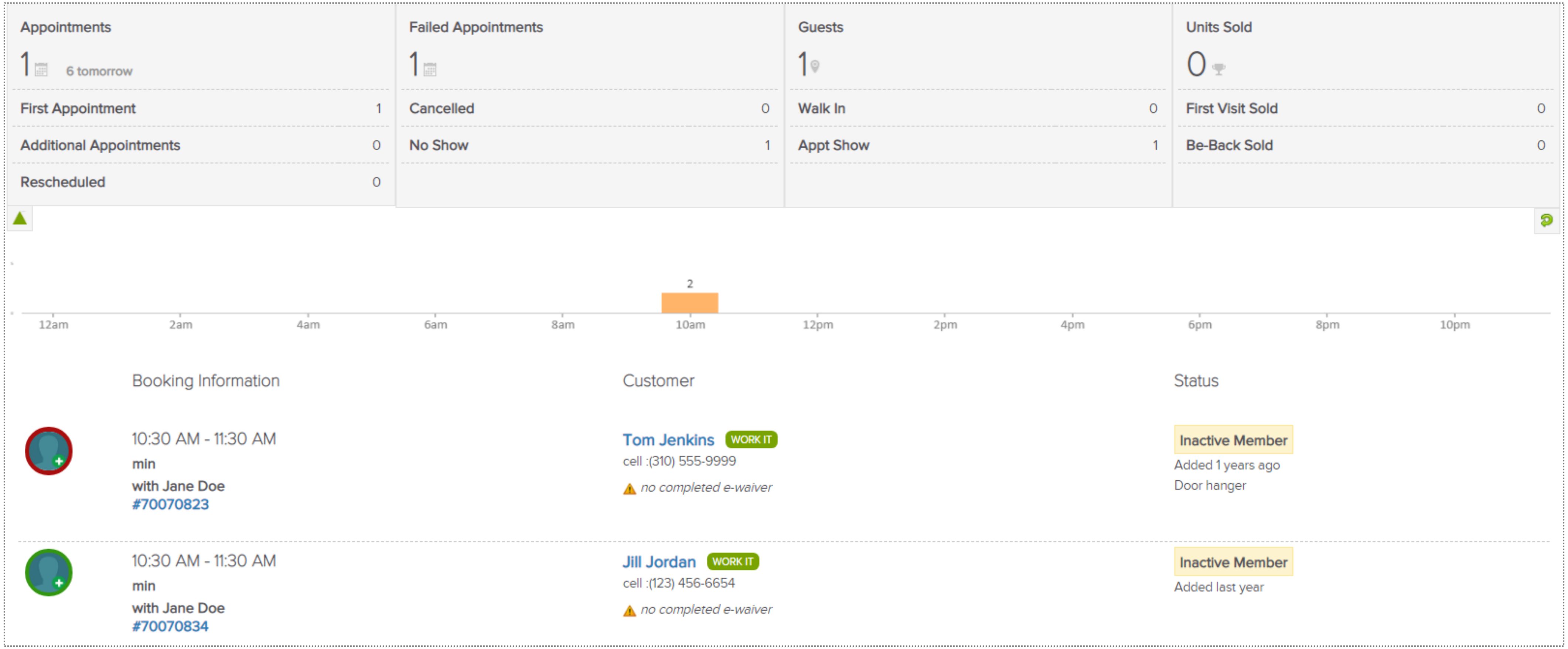


The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments, Failed Appointments, Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.

CLUB PILATES

Lead Management Dashboard – Guest Log

Main > Dashboard

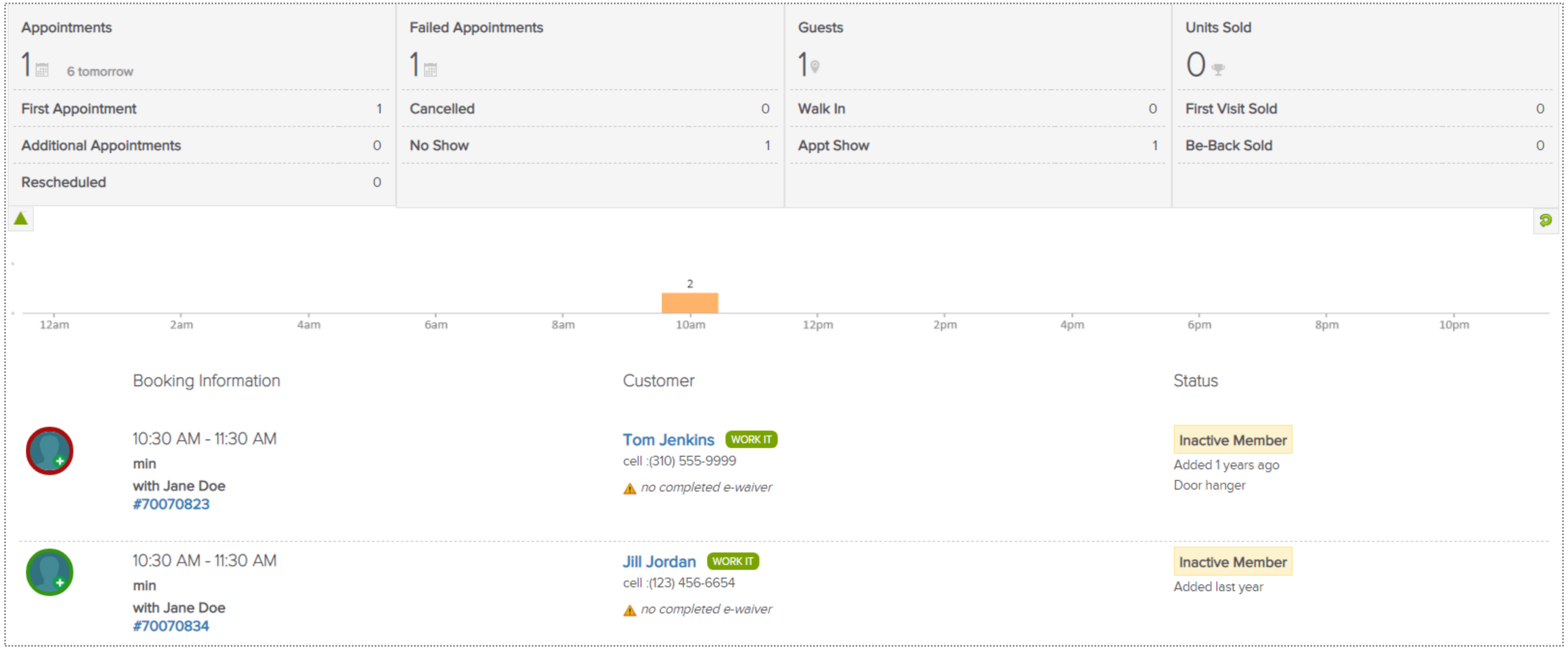


The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments, Failed Appointments, Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.

CLUB PILATES

Lead Management Dashboard – Guest Log

Main > Dashboard



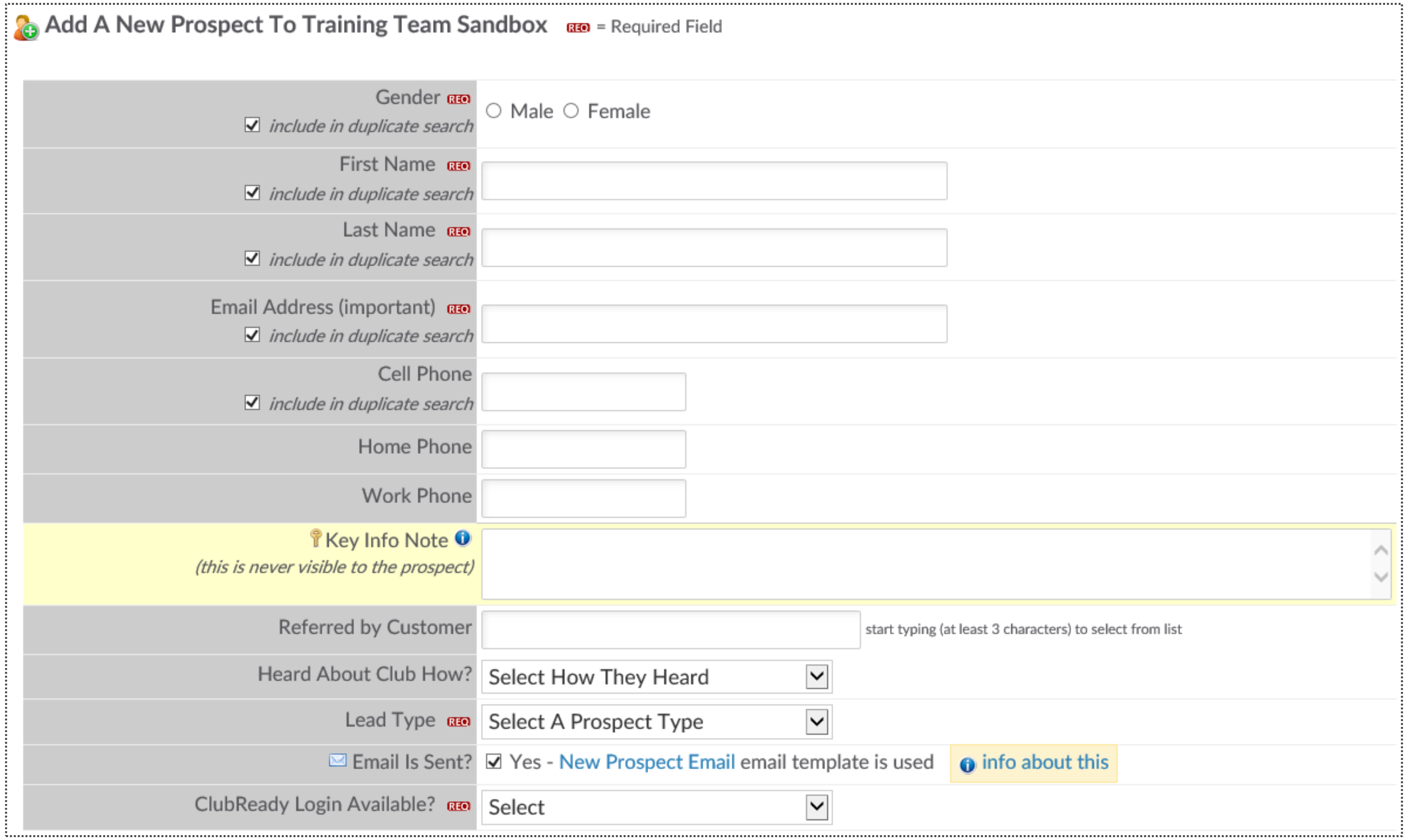
The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments, Failed Appointments, Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.

CLUB PILATES

Prospect Management / Tasks

Entering a Prospect

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


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

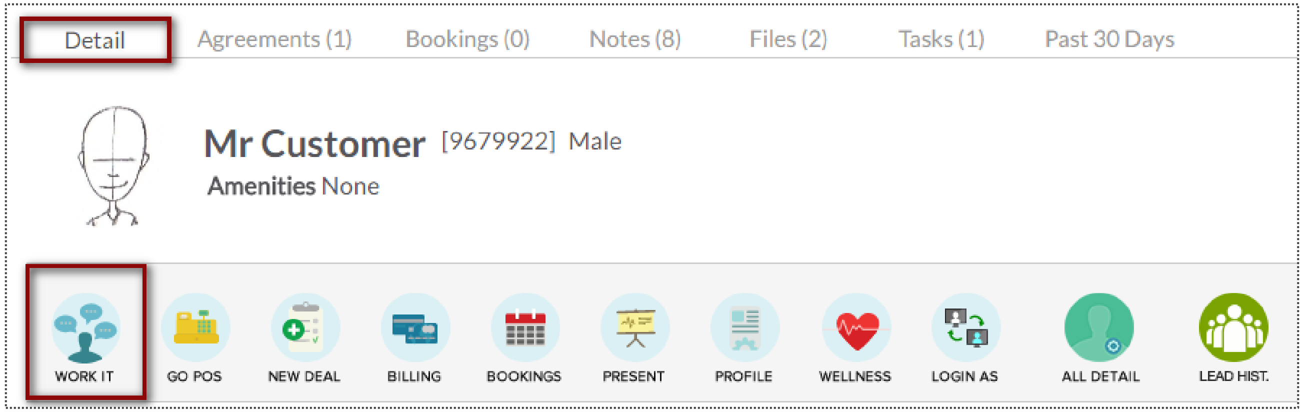
Gender REQ ☑ *include in duplicate search*	○ Male ○ Female
First Name REQ ☑ *include in duplicate search*	
Last Name REQ ☑ *include in duplicate search*	
Email Address (important) REQ ☑ *include in duplicate search*	
Cell Phone ☑ *include in duplicate search*	
Home Phone	
Work Phone	
Key Info Note *(this 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.

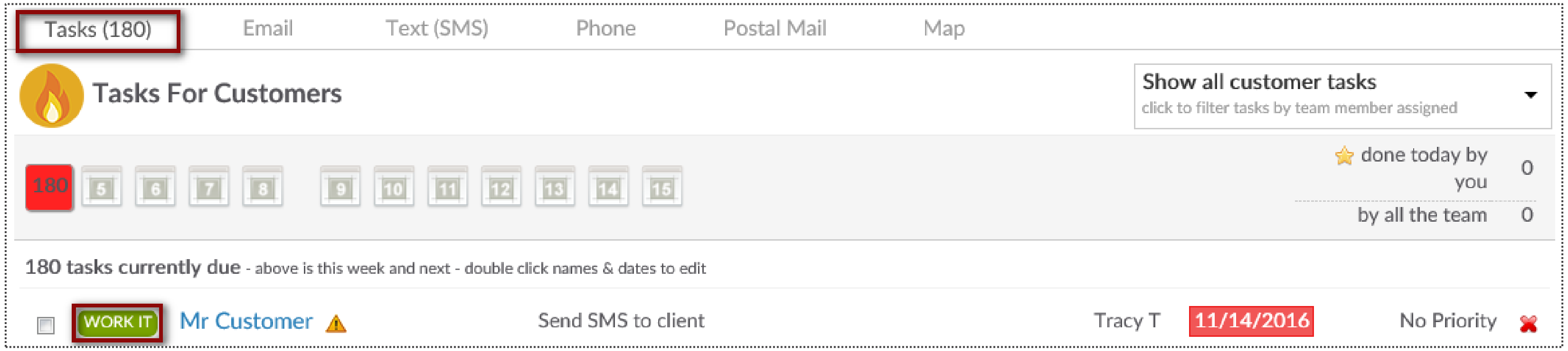
CLUB PILATES

Access the Work It

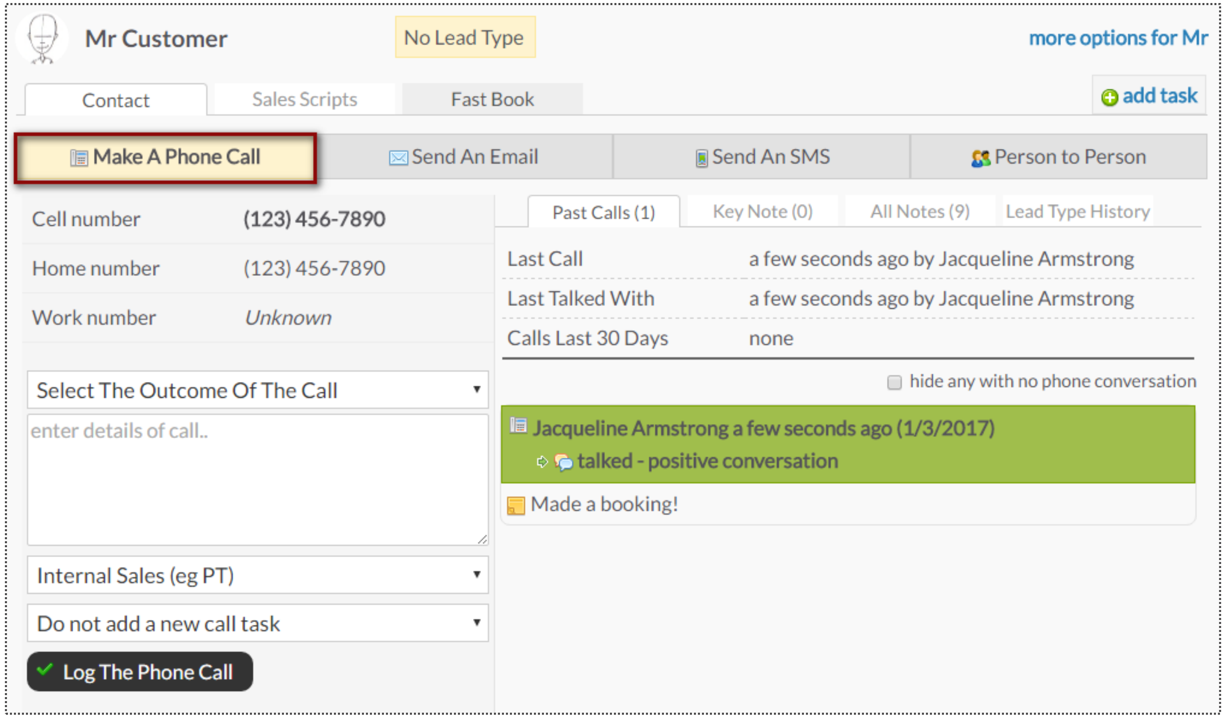
Prospects/Members tab > Tasks



OR

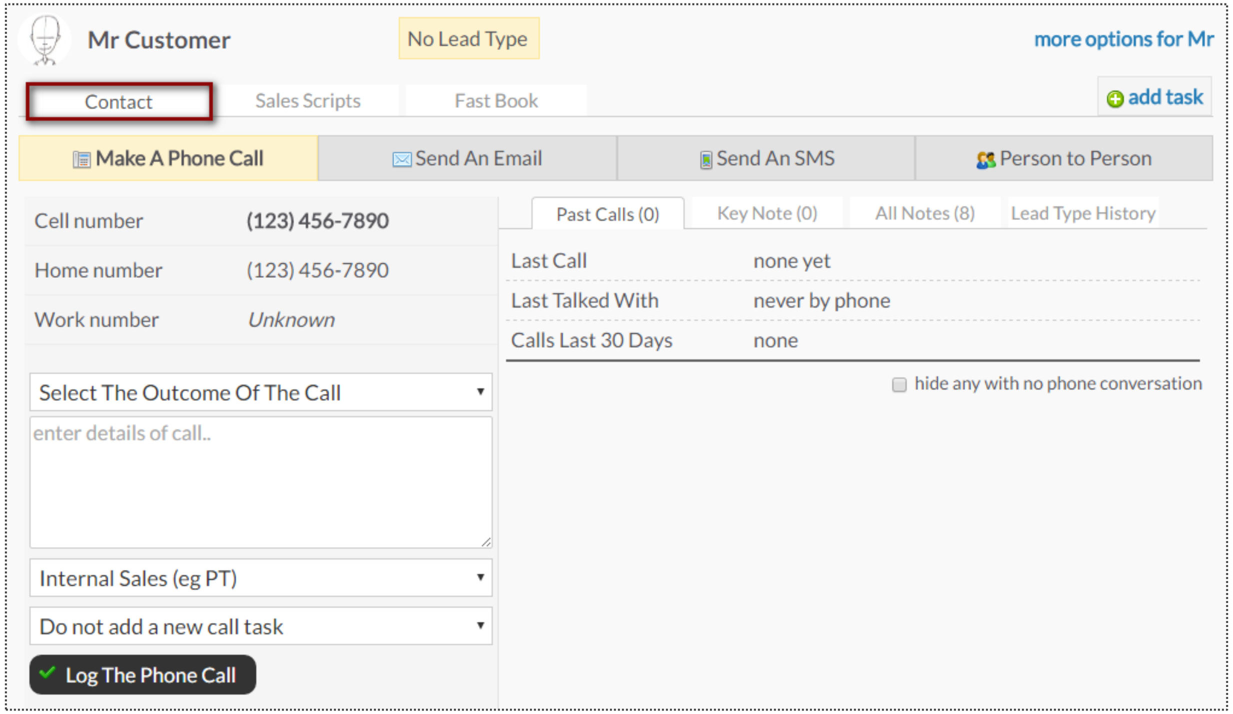


Work It – Phone Calls



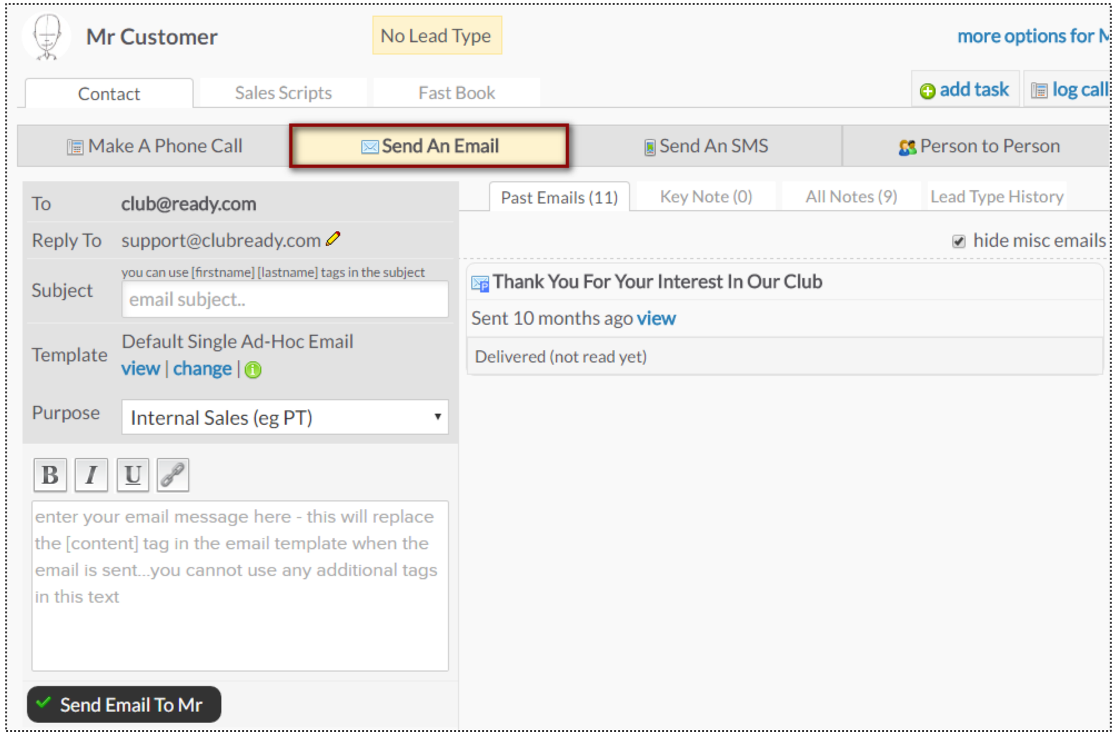
The **Make A Phone Call** tab will show the client's contact numbers, last call information, and a chronological history of the calls.

Work It - Contact



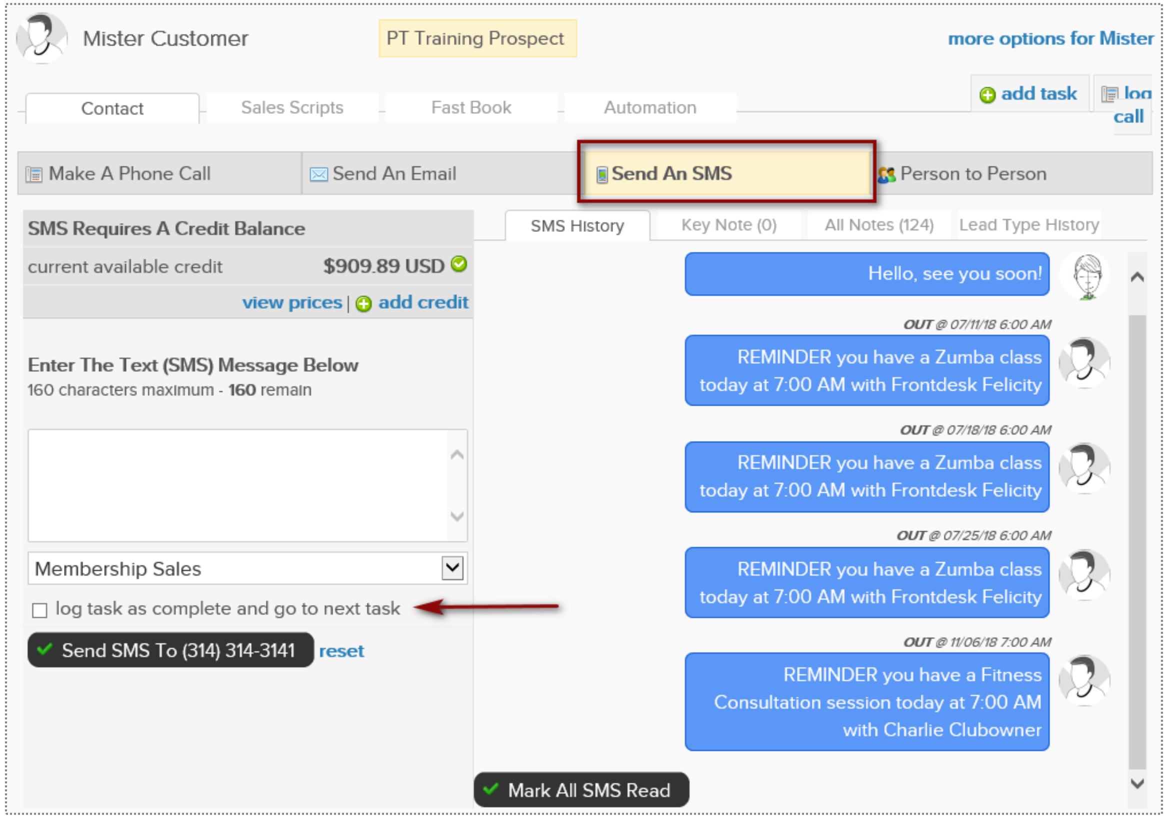
The **Contact** tab provides different contact methods that can be taken for your Prospects and Members. The options include logging phone calls, sending an email, sending an SMS (text) message, and logging person to person contact.

Work It – Emails



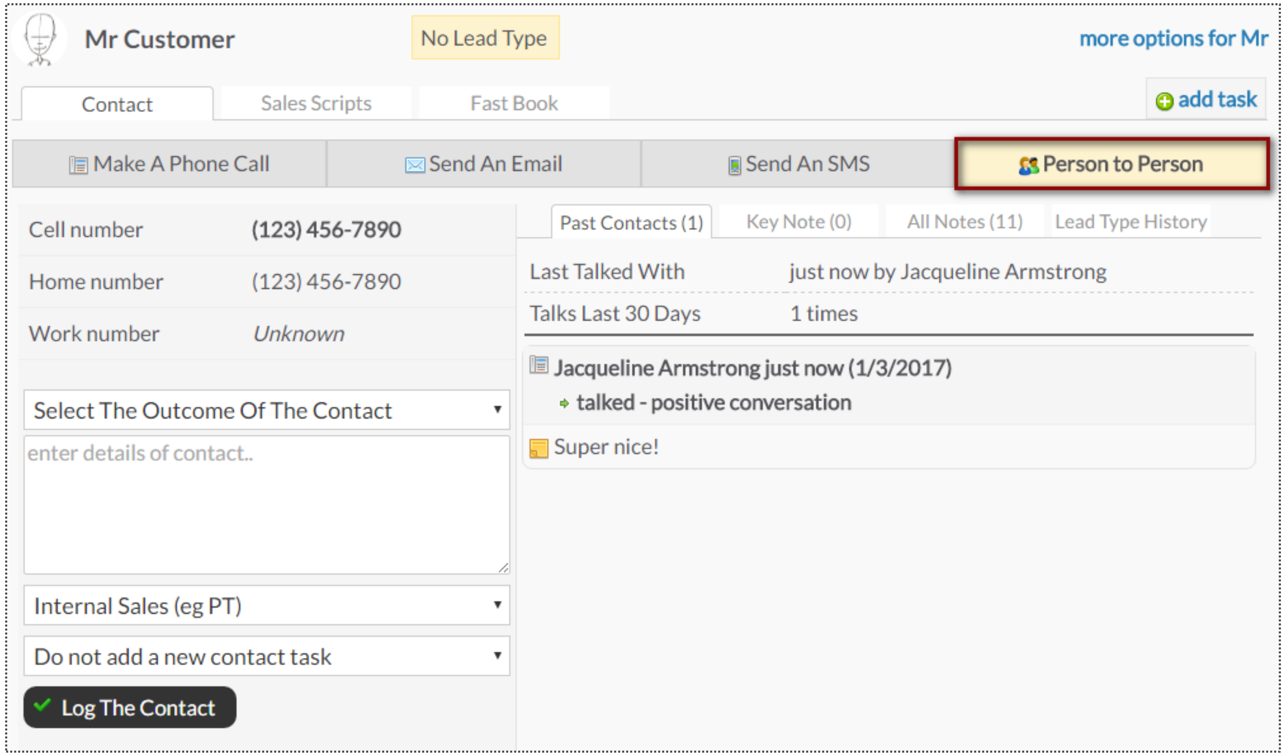
The **Send An Email** tab allows you to make contact with the client through email. The right side of the screen will show a history of email correspondence between the client and staff member.

Work It – SMS (Text Messages)



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

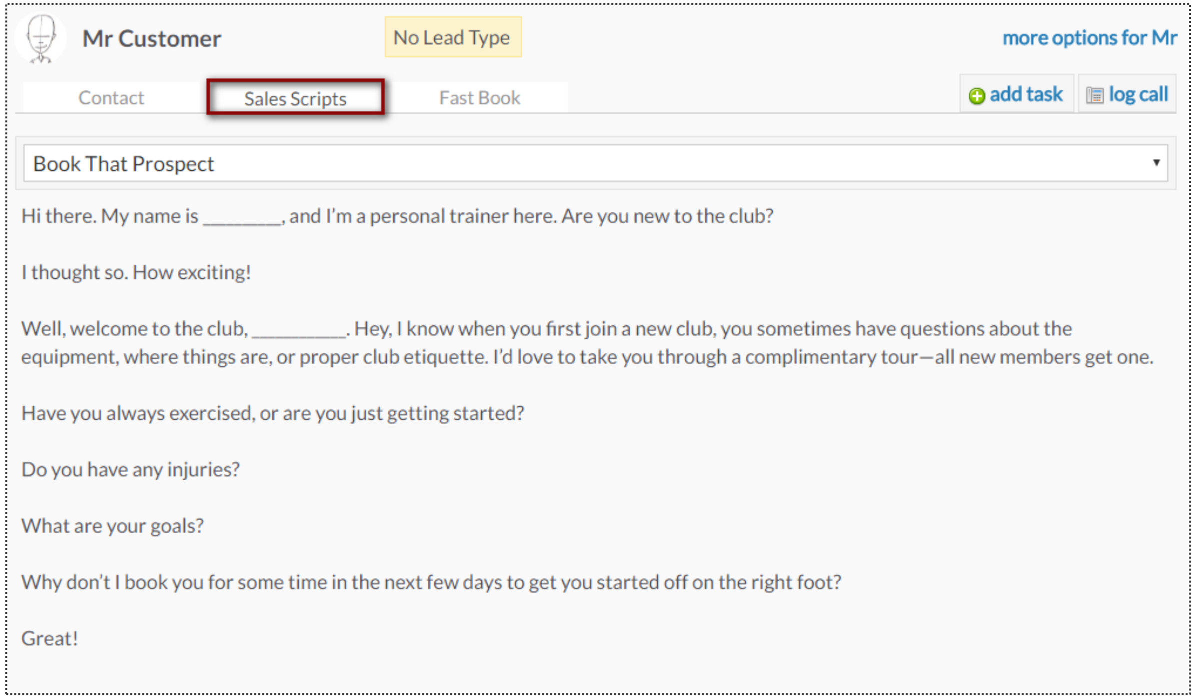
Work It – Person to Person



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

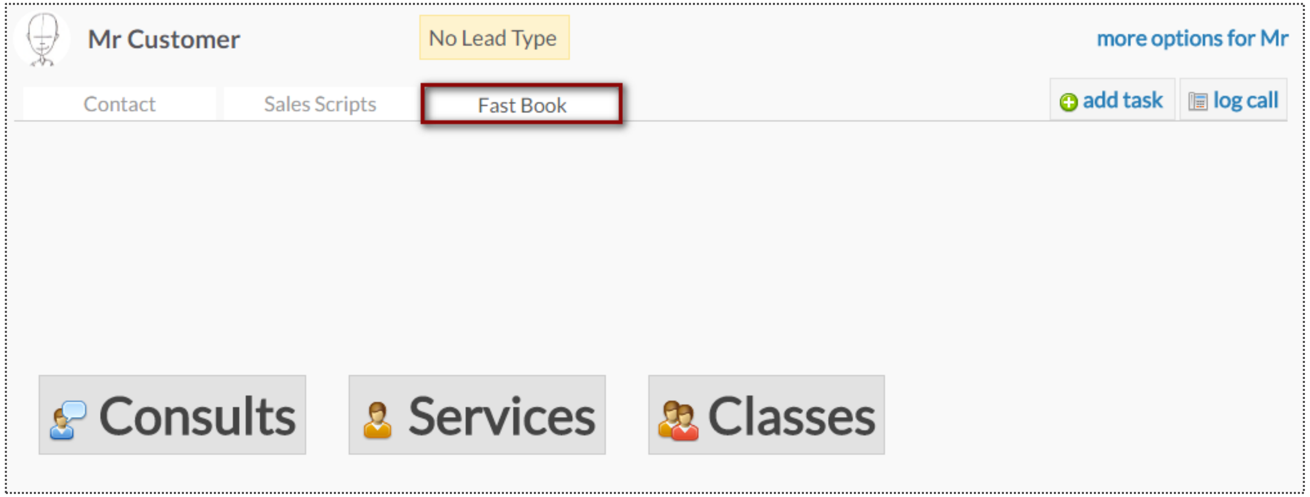
CLUB PILATES

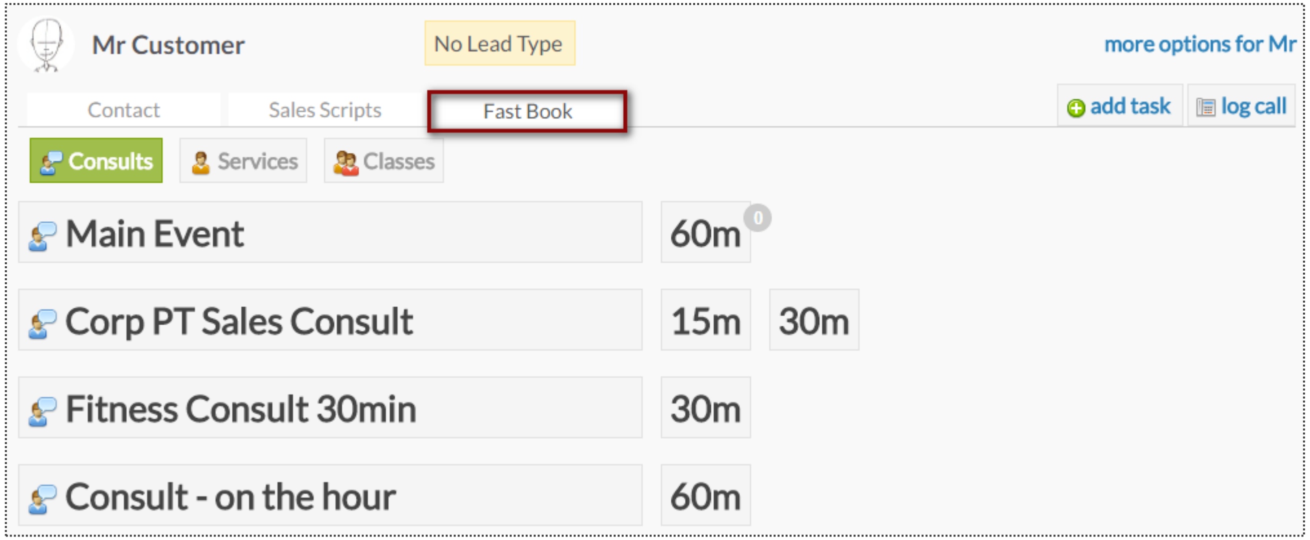
Work It – Sales Scripts



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

Work It – Fast Book

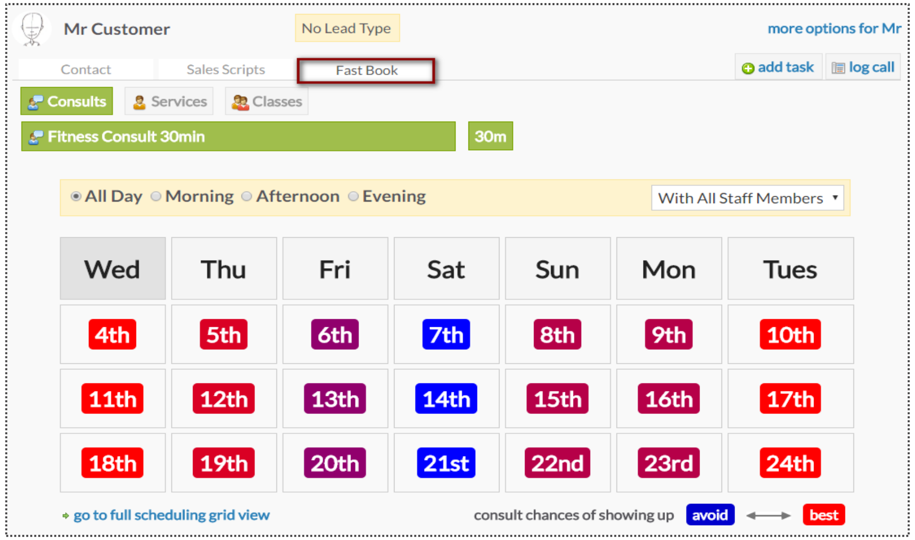


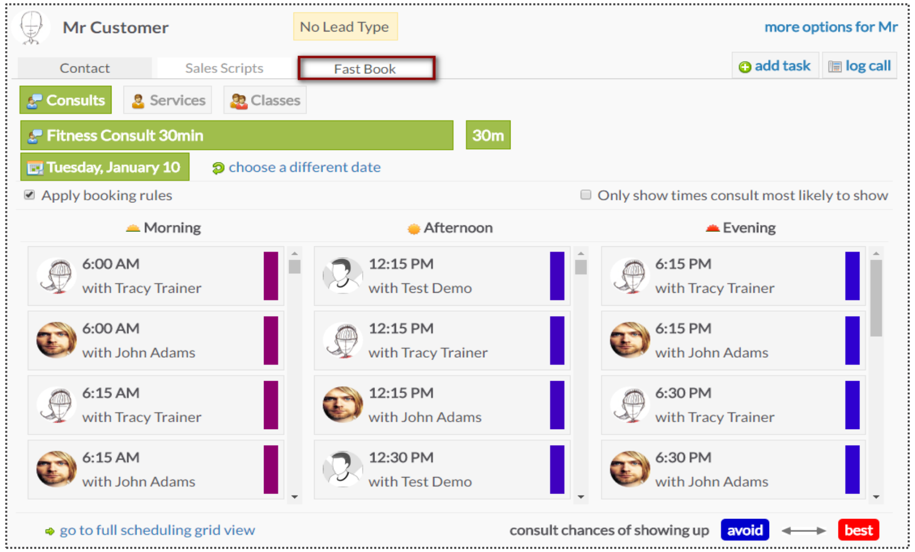


The **Fast Book** tab allows you a fast and easy way to book your client into **Consults**, **Services** or **Classes.** Simply select the type of service you wish to book as well as the duration.

CLUB PILATES

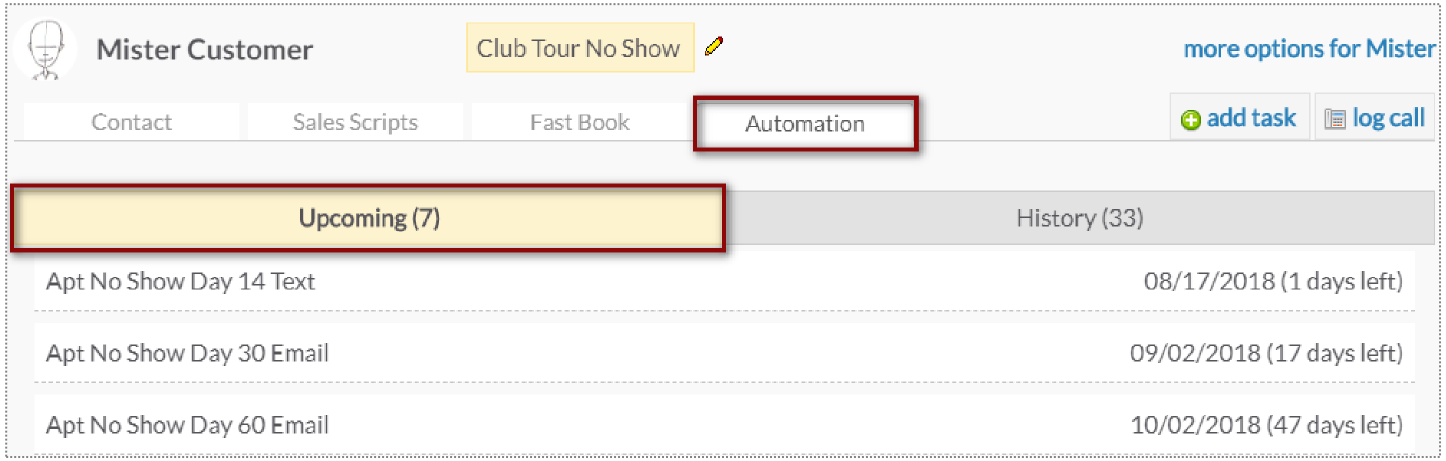
Work It – Fast Book

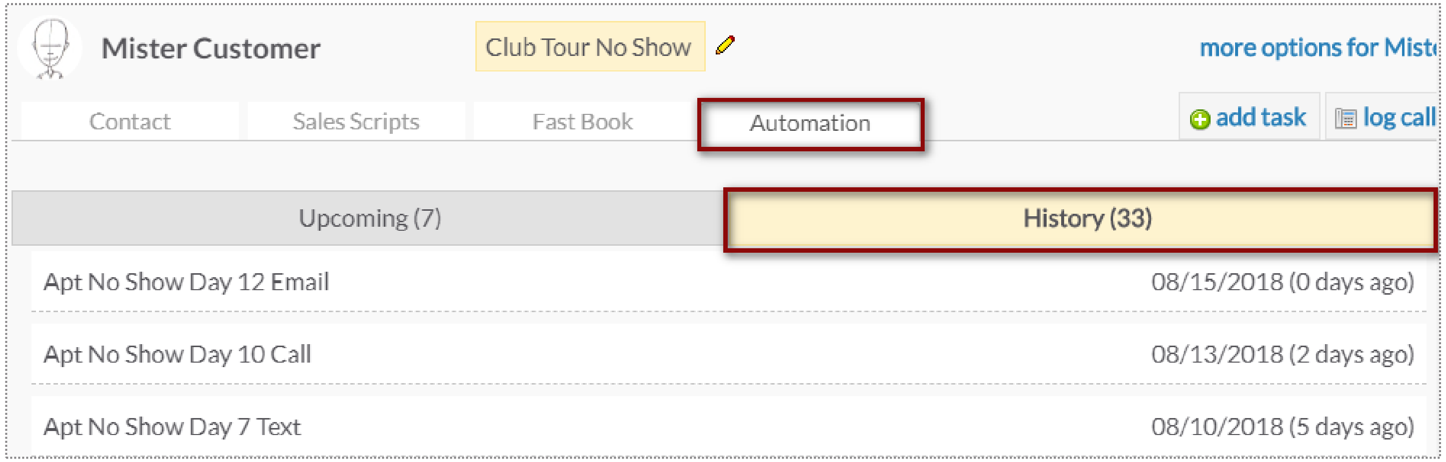




Once you've selected the type of service, you can then select the client's preference for a morning, afternoon or evening appointment, as well as the trainer.

Work It – Automation





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

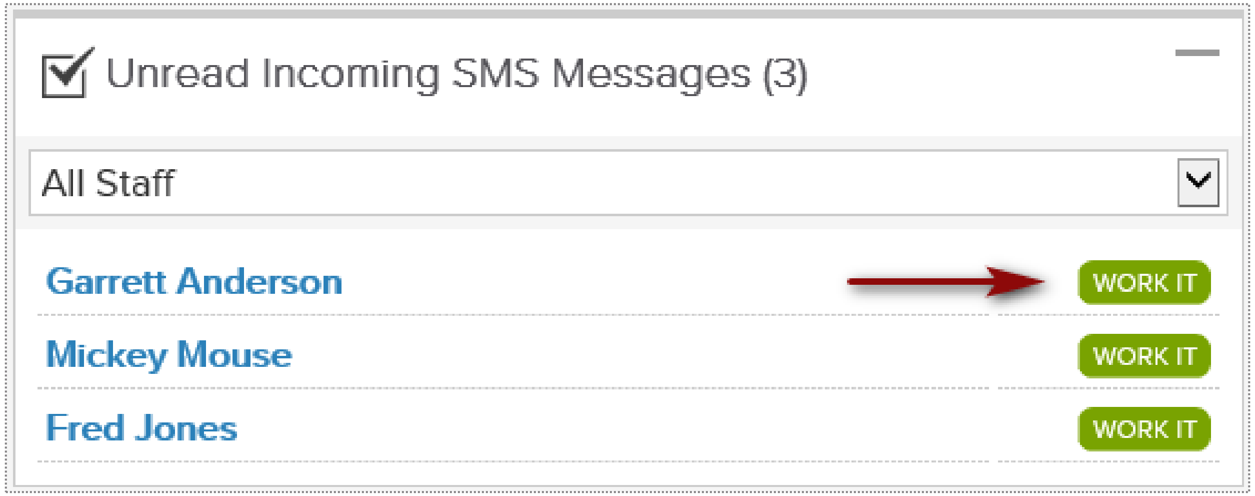
Upcoming tab will display Automation Rules that will be completed for the client in the future and when.

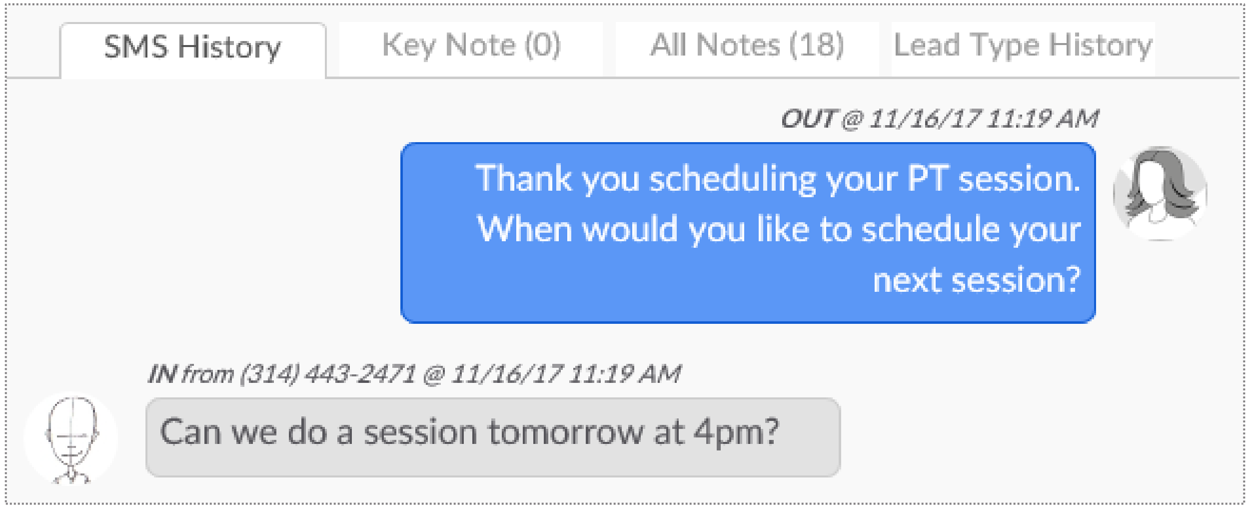
History tab will show a list of all Automation Rules that have been completed for this client. The list will include the date it was triggered and how many days ago it was.

CLUB PILATES

Widget – Unread Incoming SMS

Main > Dashboard



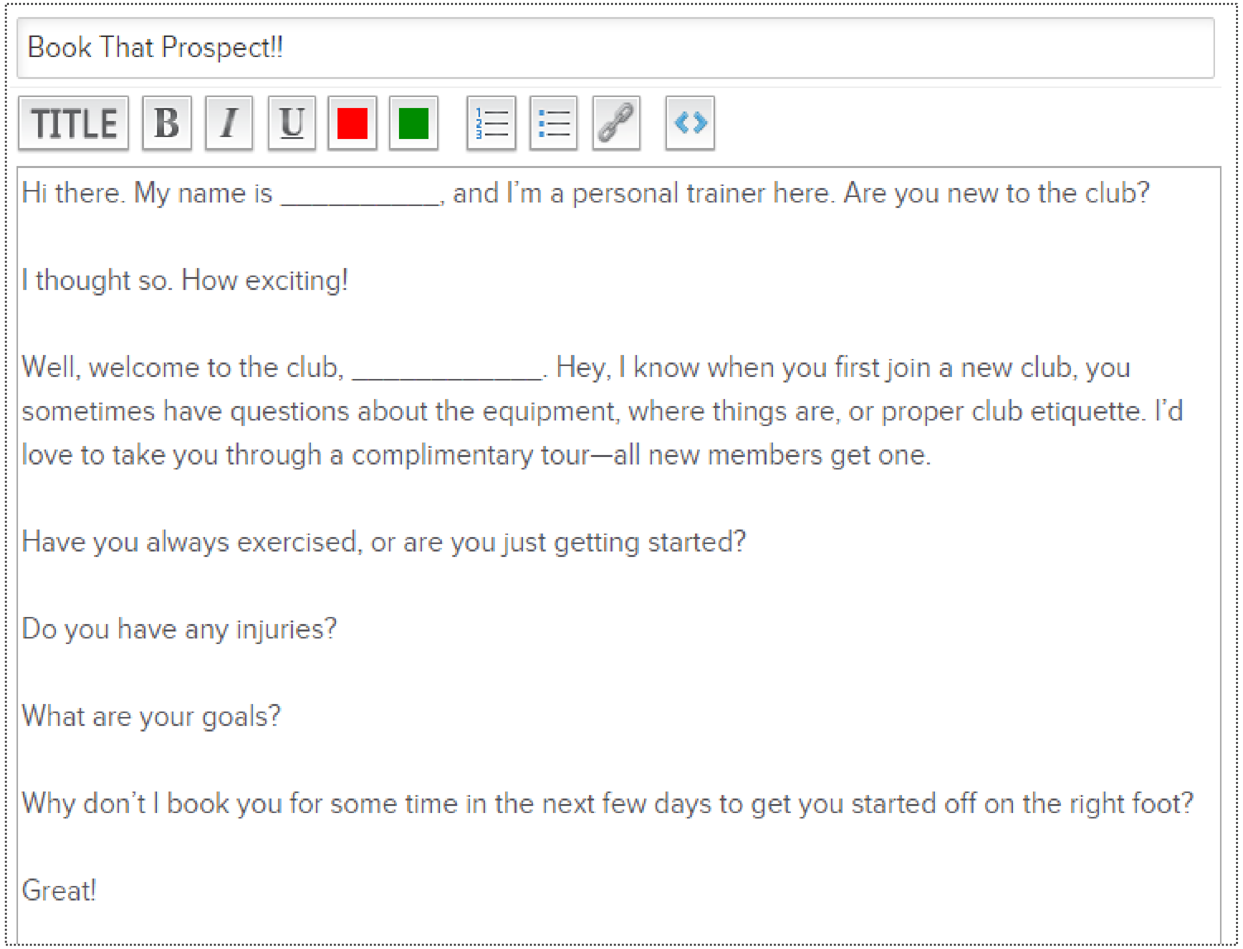


All Staff Dropdown Menu - This will show you all of your staff members. You will be able to view the texts that are replies to a specific staff member or across all staff.
Select Customer - if you click the customer name in blue from your list, you will be taken to the customer's profile all detail view.
Work It - By clicking on the **Work It** button, you will be able to access the work it tool. This will take you directly the **Send SMS (Text Message)** option, where you will see the history of texts.

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

Creating & Editing Sales Scripts

Setup > Leads > Sales Scripts



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

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

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

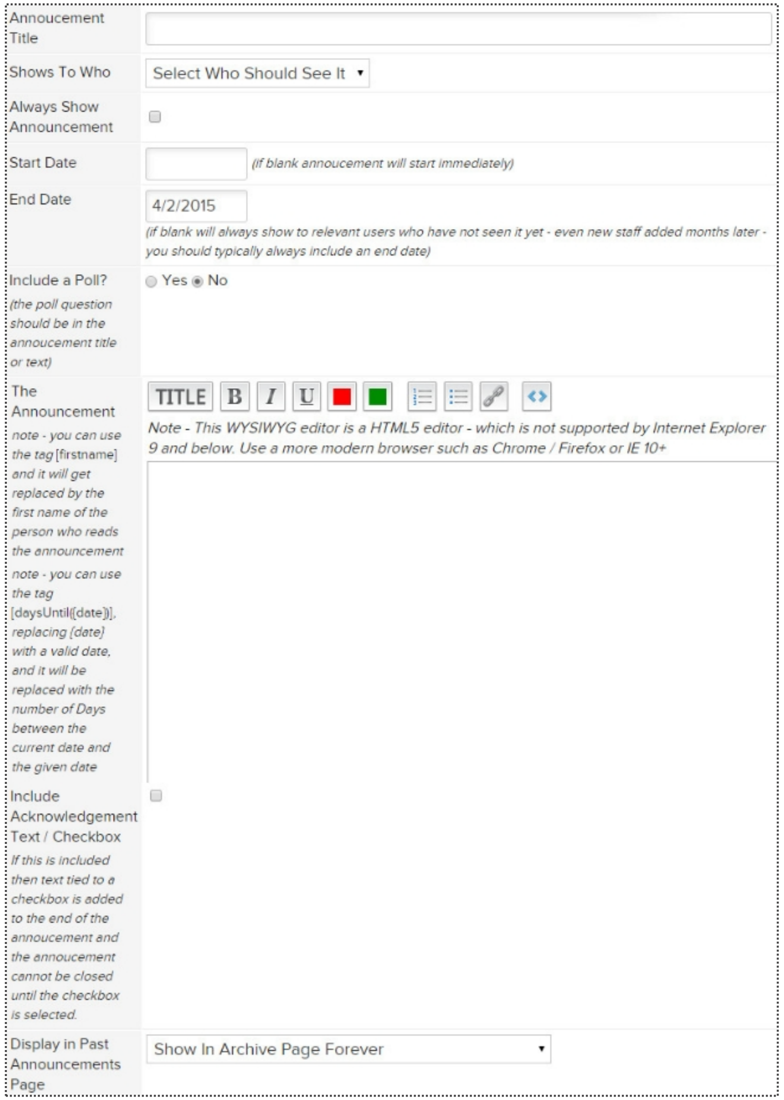
When finished click **Update Sales Script**.

ClubReady

Communications

Create Announcement

Setup > Communications > Announcements



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

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

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

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

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

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

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

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

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

CLUB PILATES

View Previous/Future Announcements

Setup > Communications > Announcements

Active (1) | Future (0) | Inactive (1)

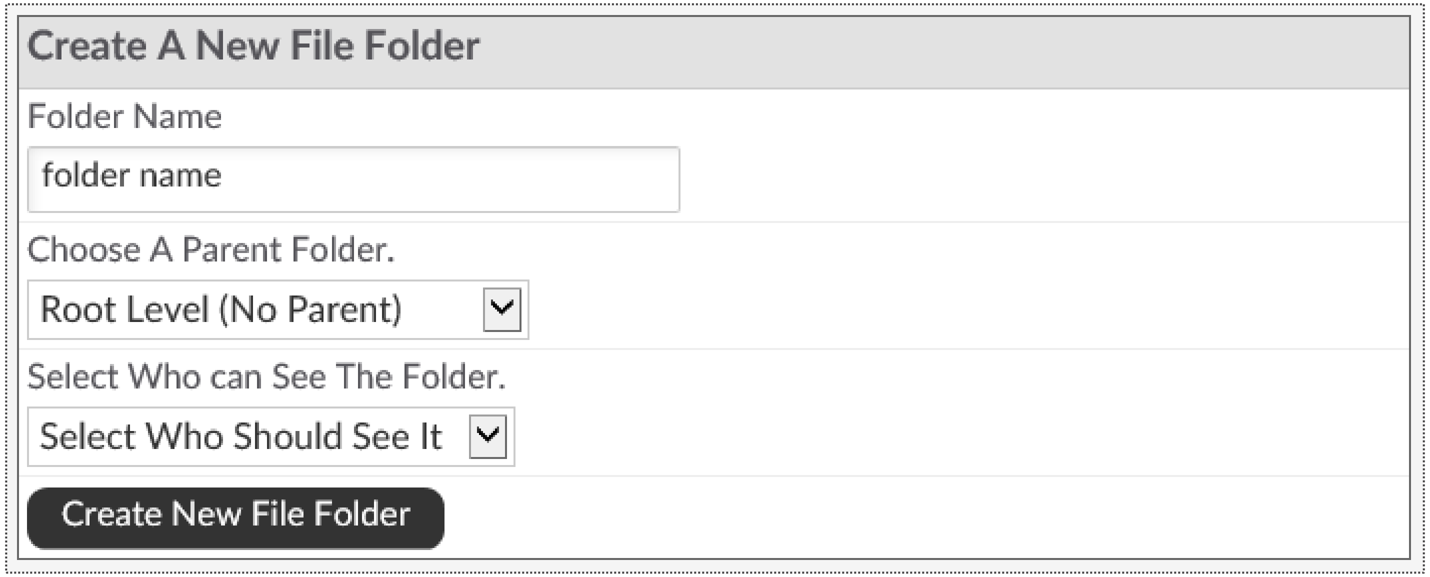
Announcement Title	Report	Includes Poll?	Start Date	End Date	
10% Off All Spring Apparel (1 views)		No	3/26/2015	3/29/2015	

Active - Announcements after being created.
Future - Future date announcements
Inactive - Announcements that have gone past their end date tab.

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

Create A File Folder

Setup > General > File Folders



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

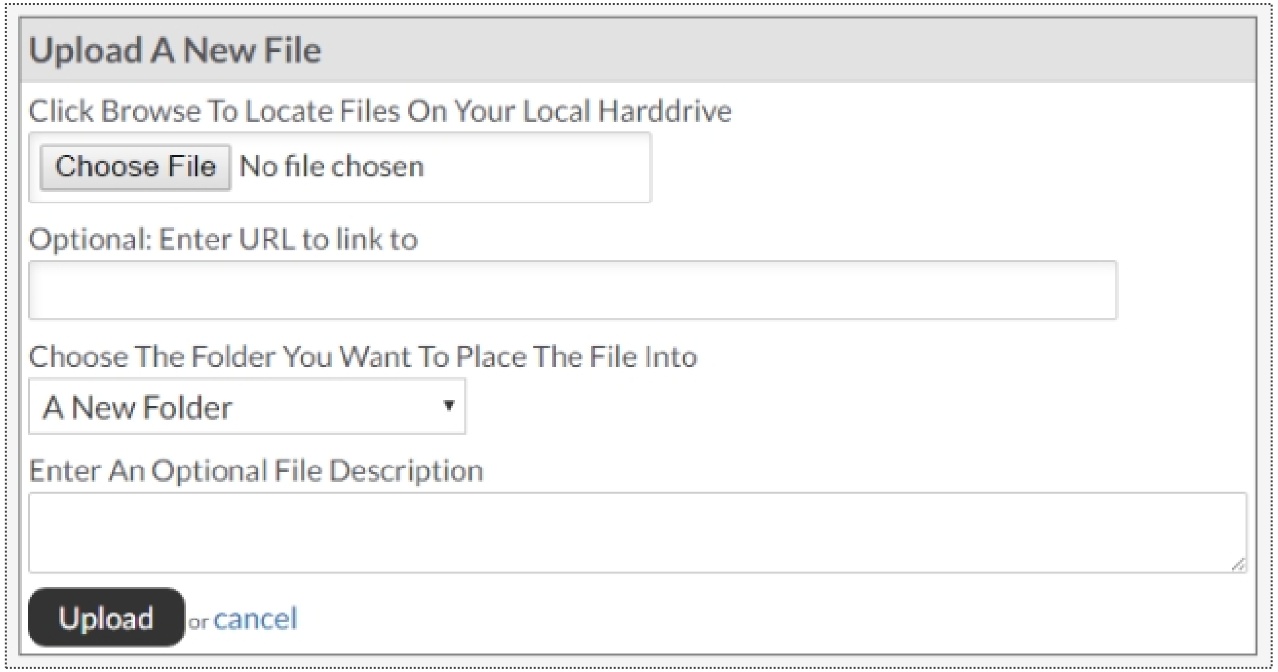
Choose A Parent Folder: If the folder being created is a sub folder of an existing folder, select the name of the parent folder. If not, leave select as **Root Level (No Parent)**.

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

Upload A File To A File Folder

Setup > General > File Folders

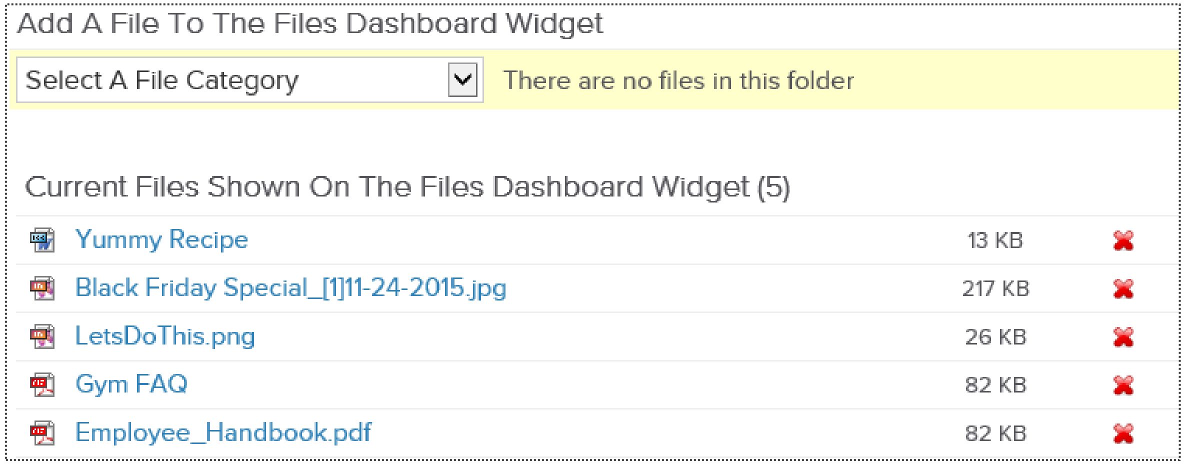
To upload a file, select the **Upload A New File** link.



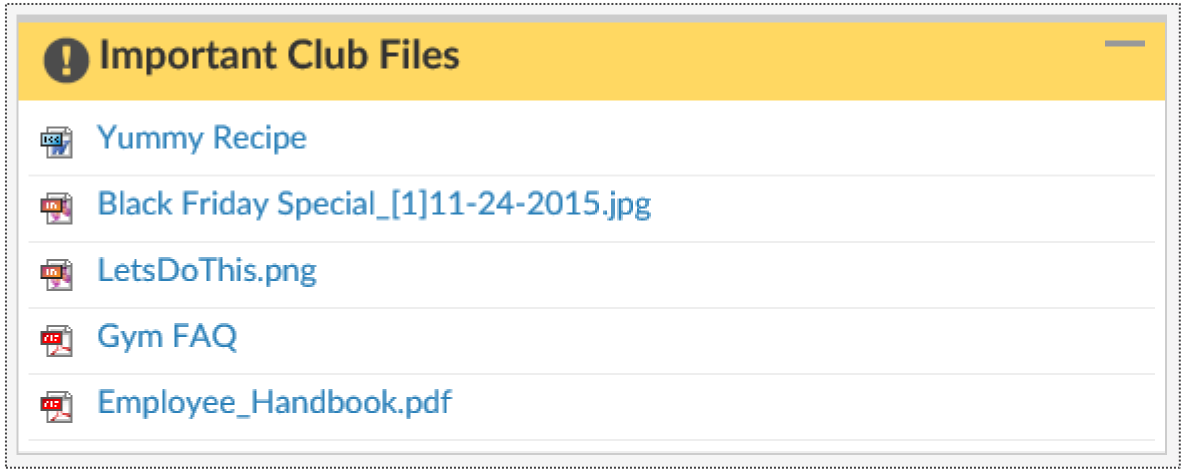
Click the **Choose File** button to search and select the desired file from your PC. There is an option to enter a URL link (this is not recommended as if someone removes the file from their site it will no longer be available). Select your file, then select the folder you wish the file to be stored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

Important Files Widget

Setup > Staff > Files Widget



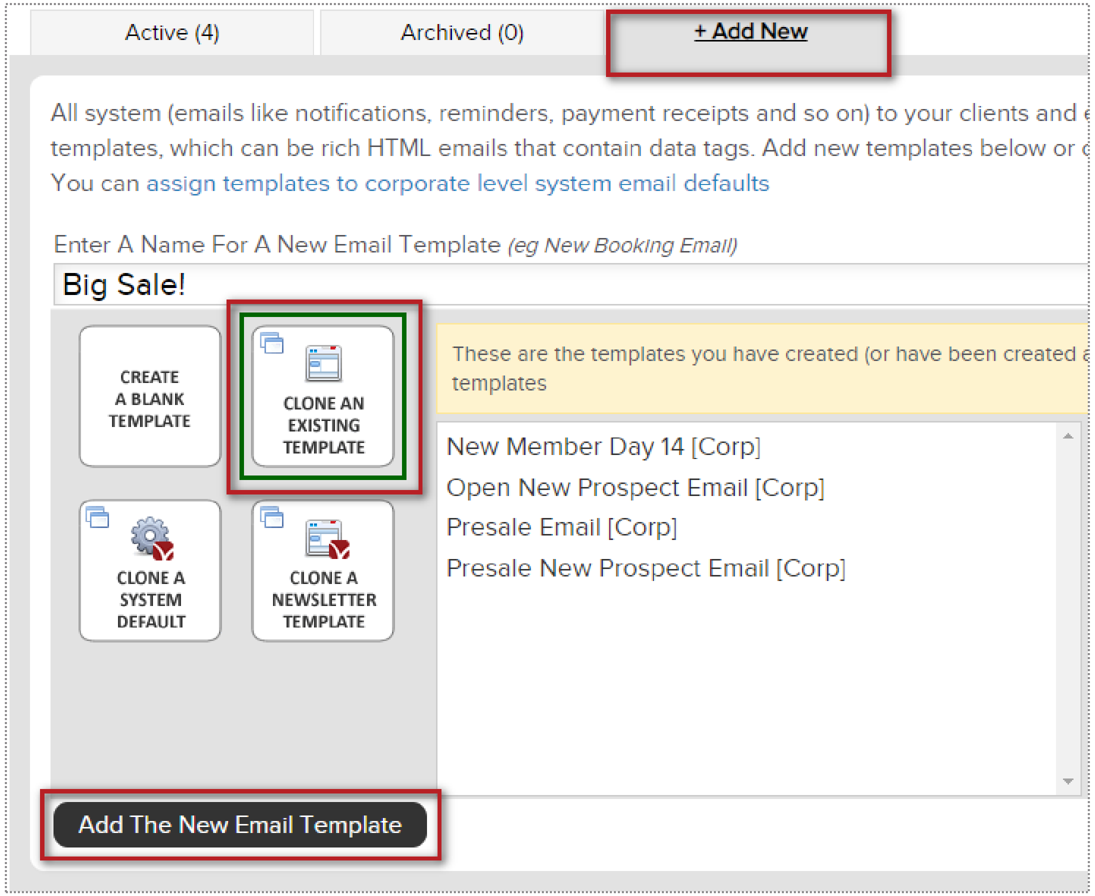
The files dashboard widget allows you to place specific files from your file store onto staff members dashboards. From the dropdown menu choose the folder, then the specific file. You do have the option to re-name the file for display in the widget. Click the **Add Selected File To Widget** button to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



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

Email Templates

Setup > Communications > Email Templates



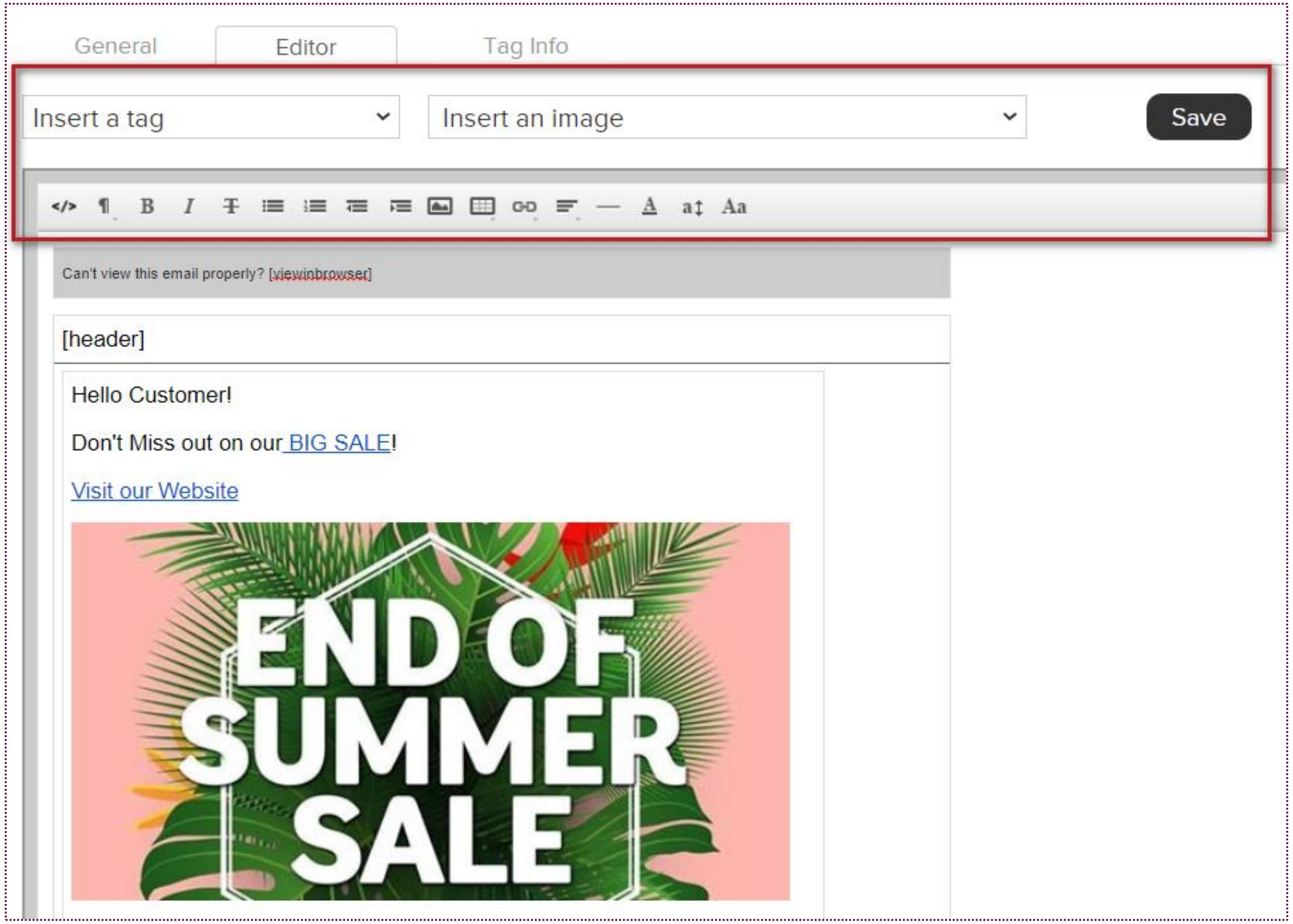
Click on the **+ Add New** tab to choose from the 4 ways to create a custom template:

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.

Email Templates

Setup > Communications > Email Templates



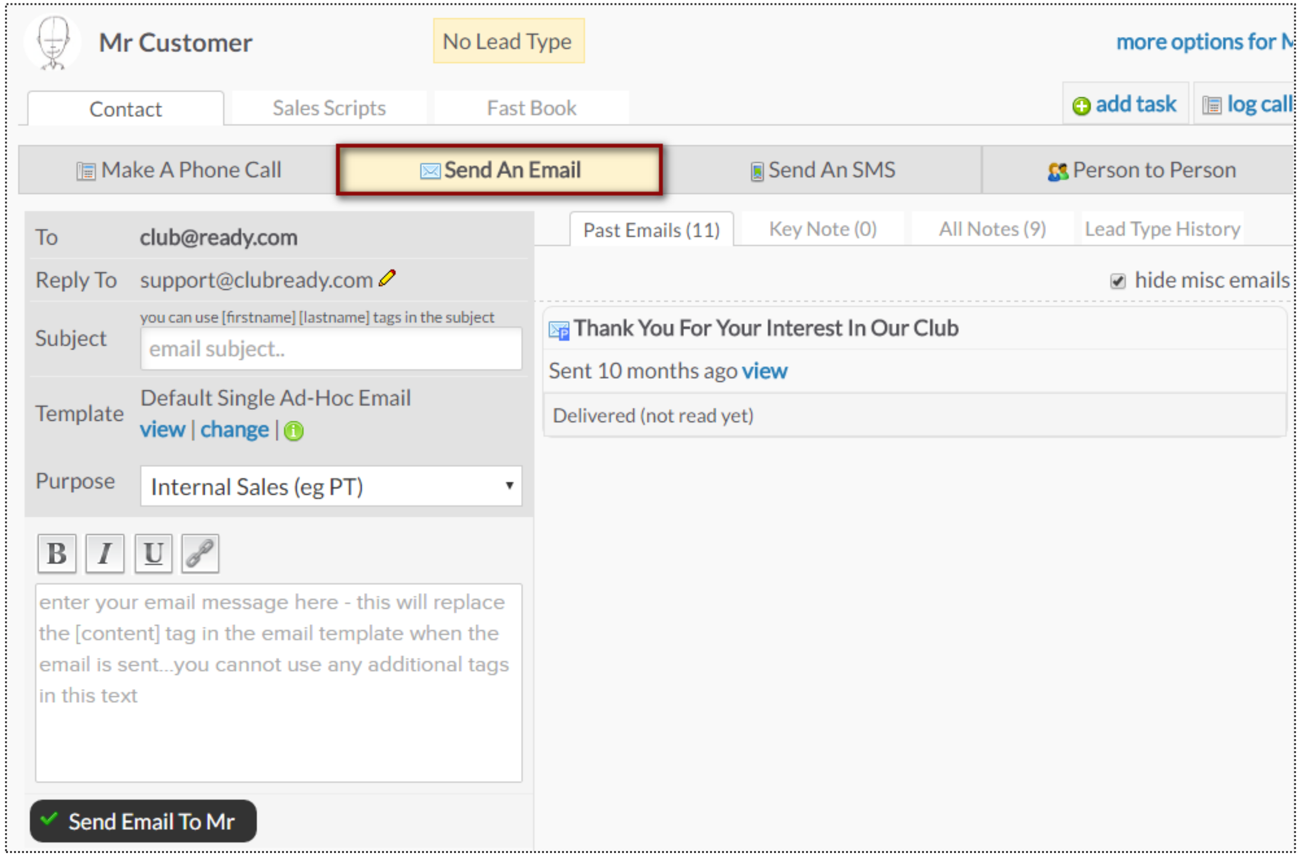
Click on the **Editor** tab to proceed adding the content for your email template.

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

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

Individual Emails

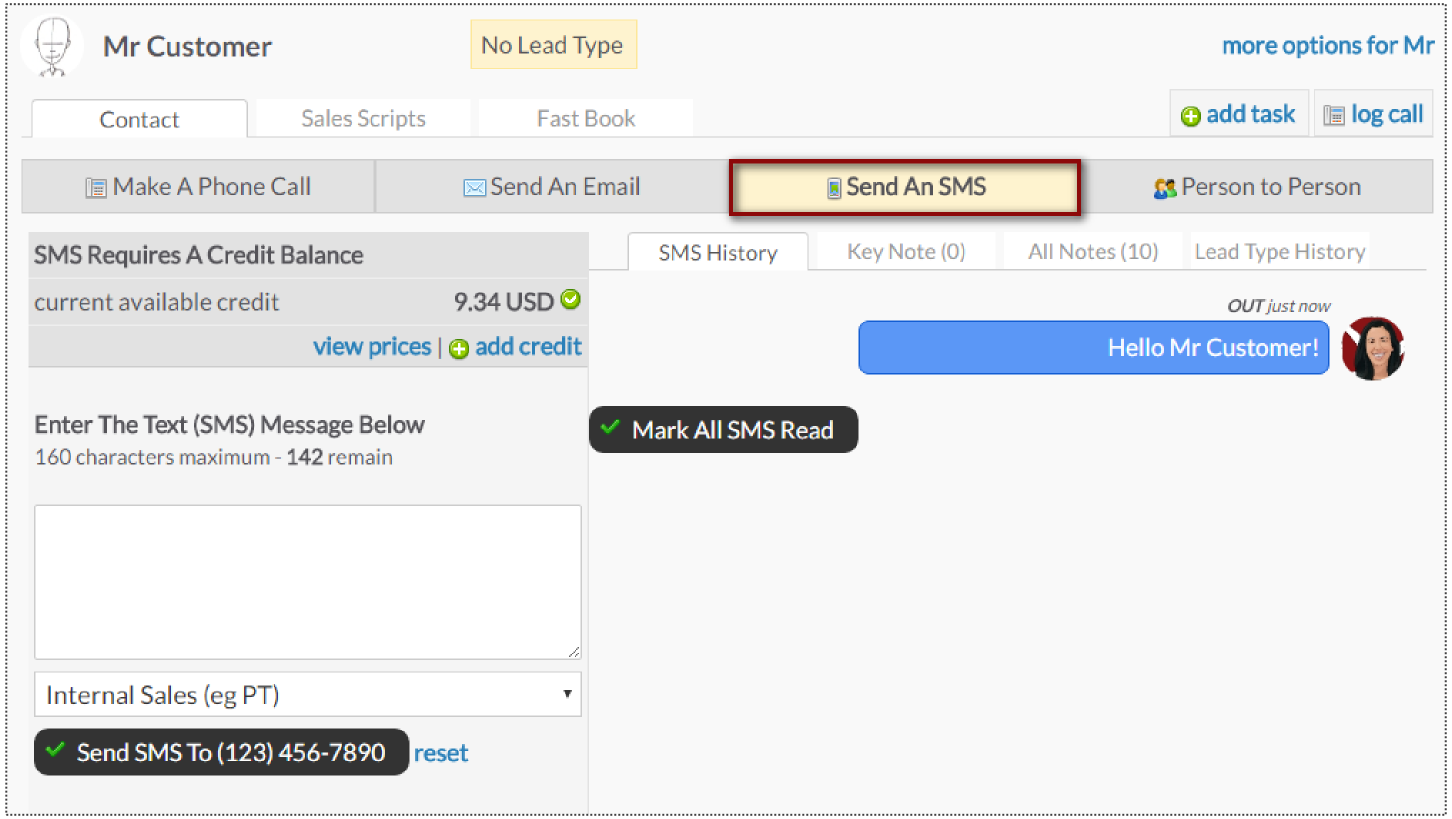
Prospect/Member Account > Work It



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

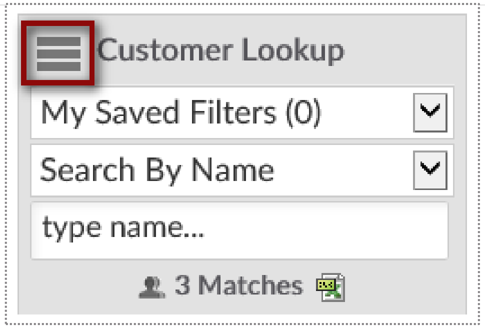
Individual Texts

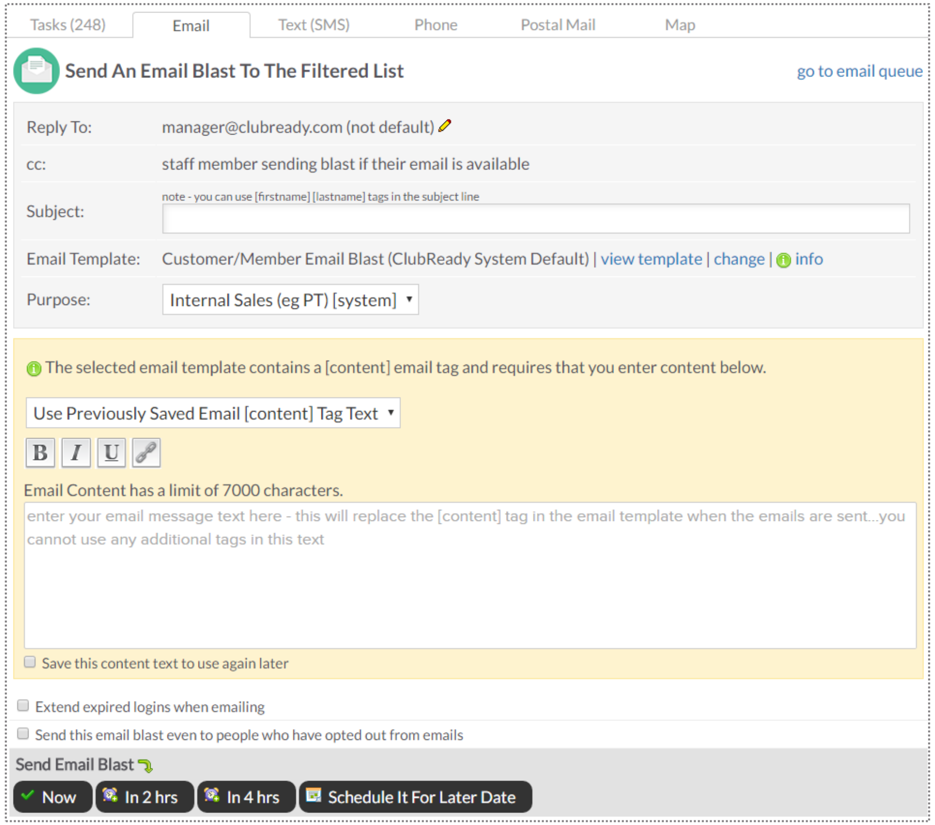
Prospect/Member Account > Work It



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

Email Blasts





Prospects/Members > Email

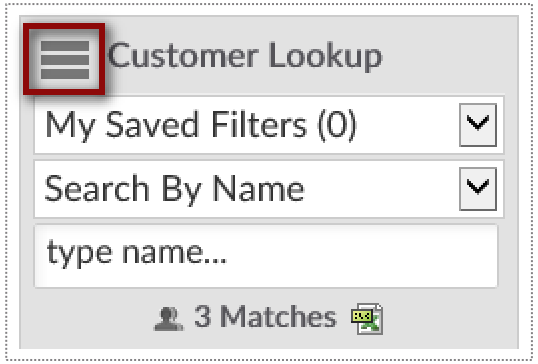
Your email blast will attempt to send to all of the prospects/members that are showing in the lookup list at the time you send your blast, so filtering will allow you to email a target audience. To start narrowing who will receive an email blast, click on the 3 bars. This will provide you with options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

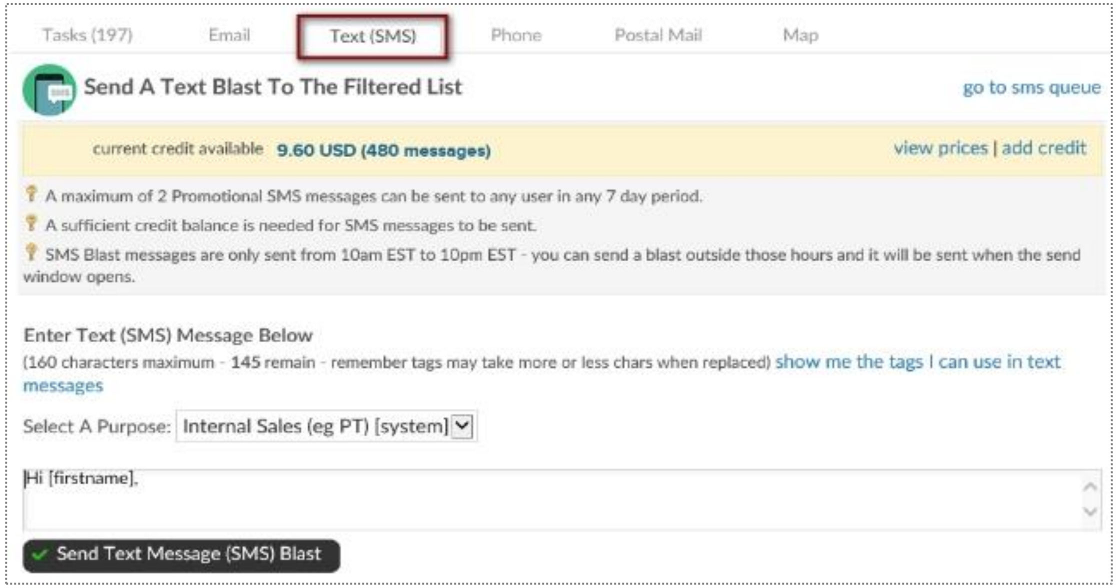
Select, or fill in, the following fields: **Reply To**, **Subject**, **Email Template, Use Previously Saved Email** (If you have saved any email content previously you can select this saved text from the drop-down box).

Other selections will include:
Save this content text to use again later - If you are going to send this out on a regular basis.
Extend expired logins when emailing - If you want to extend the client's access to their login area.
Send this email blast even to people who have opted out from emails - This option is typically used for notifying clients of past due or collections status issues.

Text Blasts

Prospects/Members > Text (SMS)





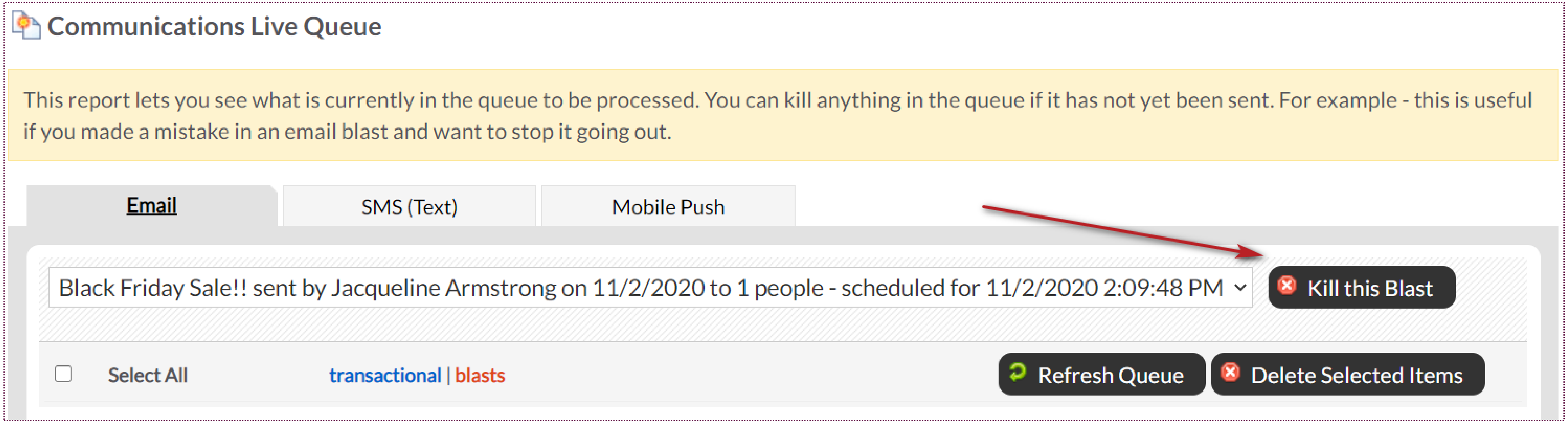
To start narrowing who will receive a text blast, click on the 3 bars. This will provide you with options to narrow the search.

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.

Live Send Queue

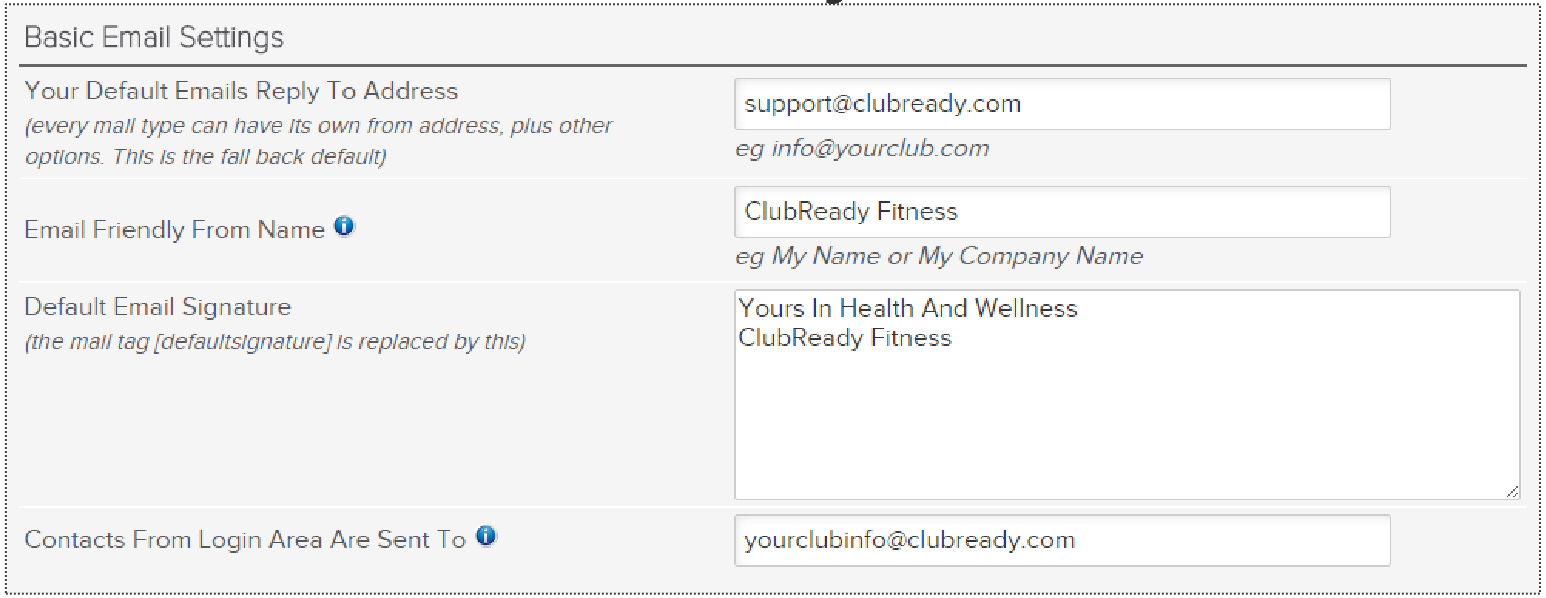
Reports > Communications > Live Send Queue



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

Basic Email Settings

Setup > Communications > Communication Settings



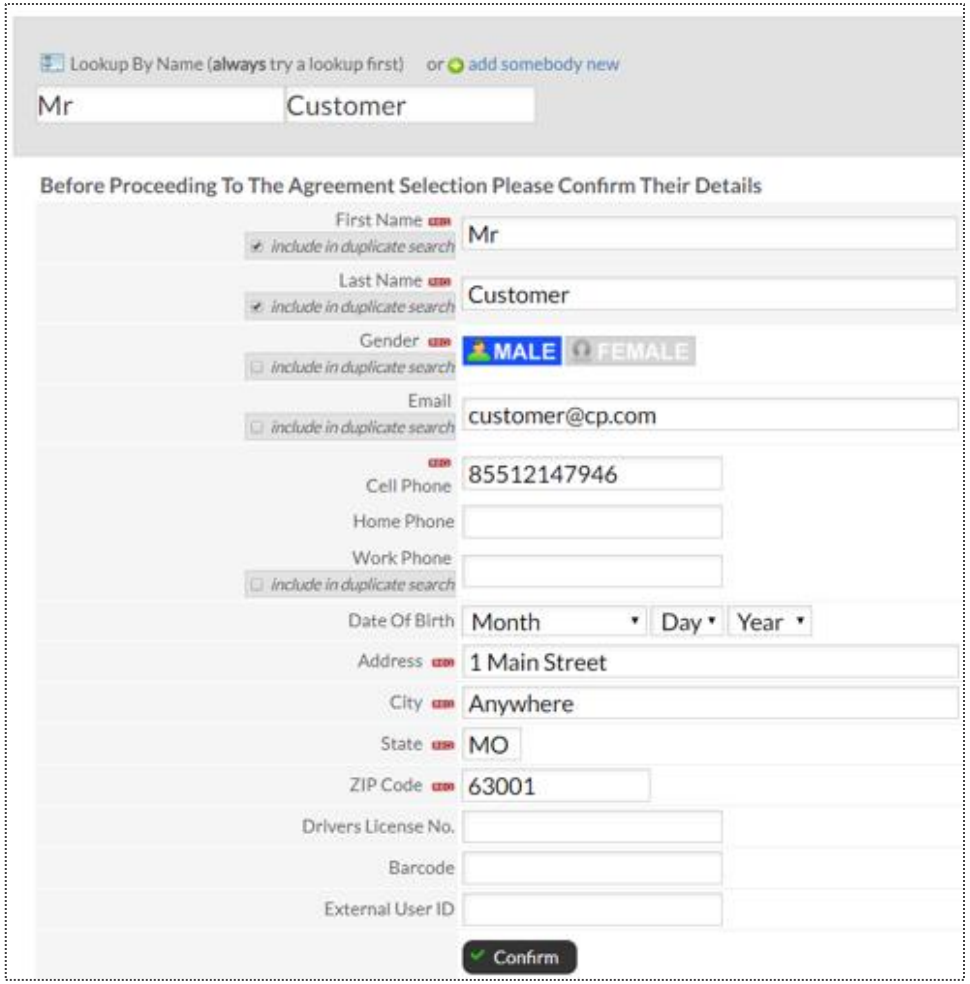
Your Default Emails Reply To Address - email address that will be the default used for all emails sent from the system unless you specify a different email under each email defaults.
Email Friendly From Name - the name that you would like your clients to see in the from field when they open their email.
Default Email Signature - what you would like clients to see for your email signature. In any email blast you can use the tag [defaultsignature] tag instead of typing your signature in each email template or blast.
Contacts From Login Area Are Sent To - When clients reply back this will be the email address these responses are sent to.

CLUB PILATES

Agreement Write Up

Write Up New Agreement – Search For User

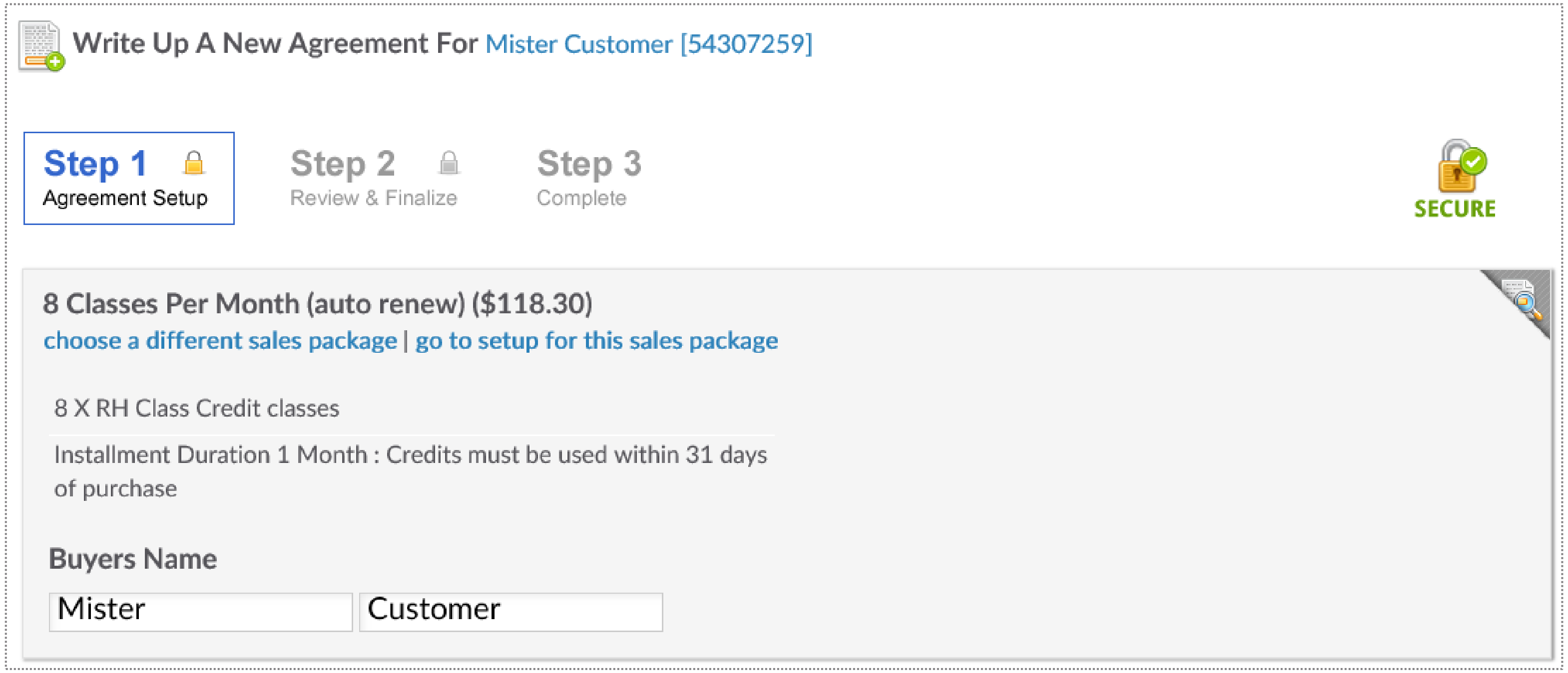
Main > Write up New Agreement > Search for client



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

Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates



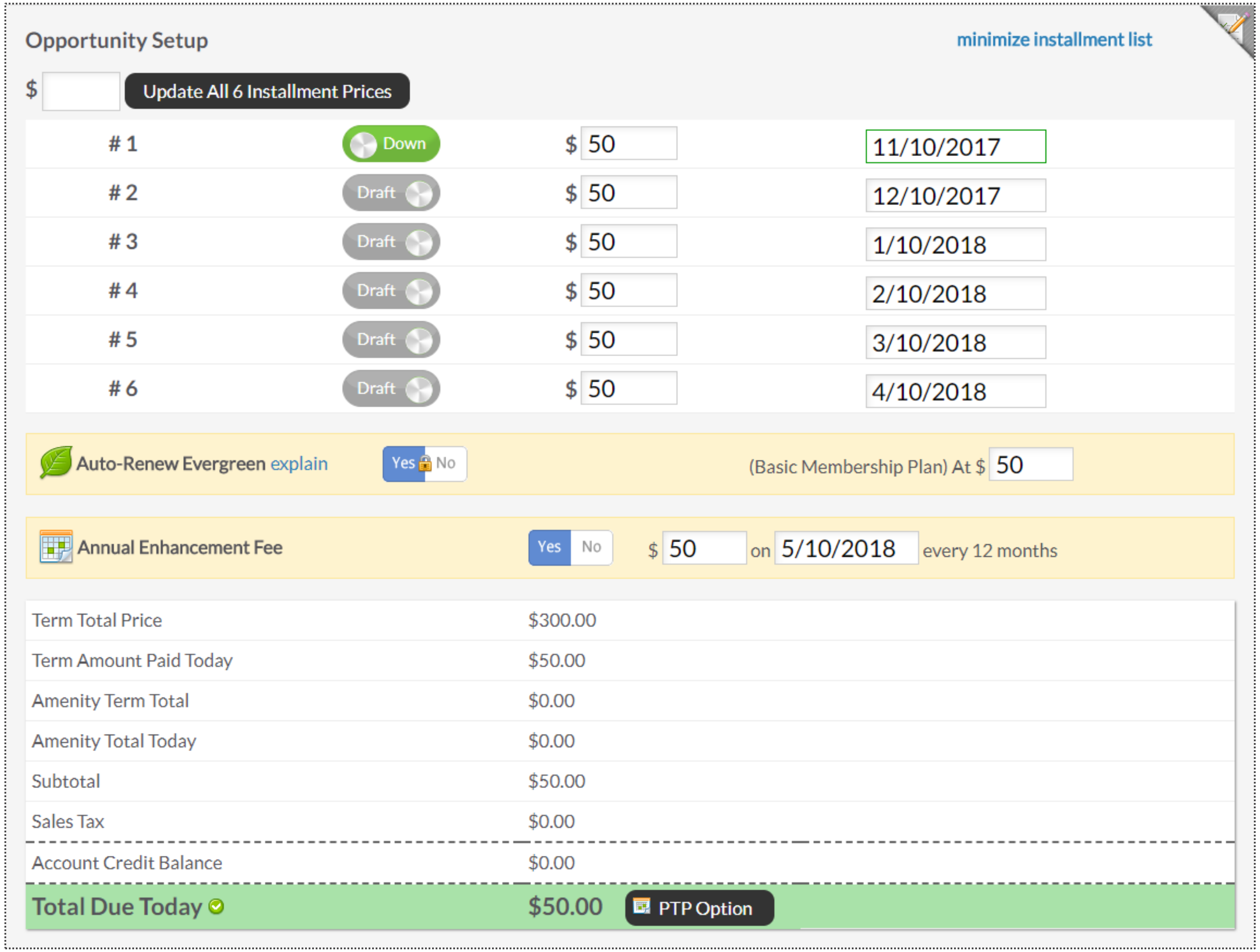
Step 1: After selecting the Sales Package Folder and desired package you will be taken to the **Write Up A Agreement For** screen.

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

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

Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates

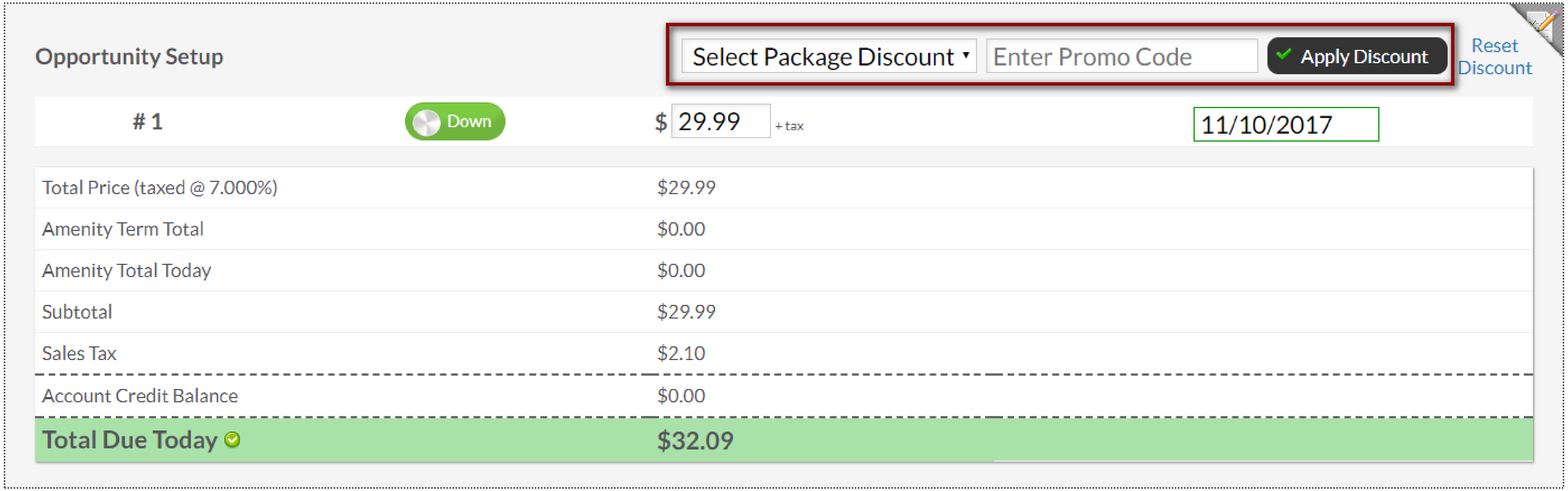


Opportunity Setup - Shows initial planned payments and their due dates. You have the option to adjust both the amount coming due and their due dates.
Auto-Renew Evergreen - The status of an auto-renew agreement will be detailed here. Select **No** if the customer does not want this agreement to be on Auto-Renew.
Enhancement Fee - If an Enhancement Fee is included in this package it will be detailed here.

CLUB PILATES

Apply a Package Discount

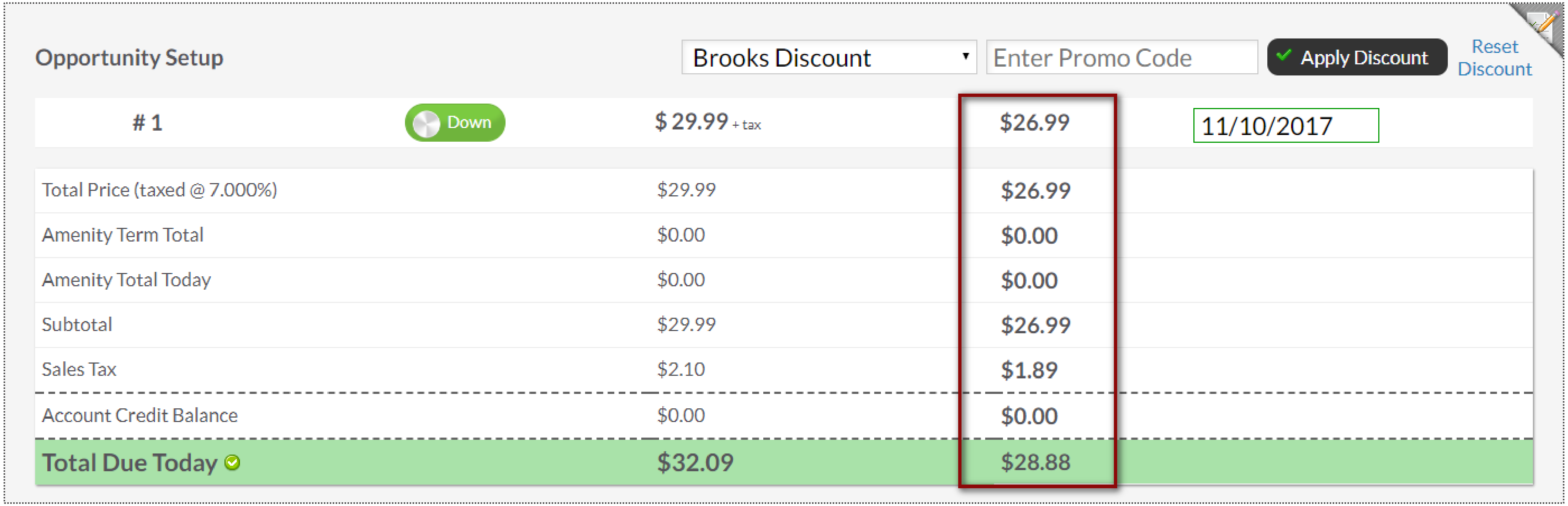
Select Plan > Adjust Pricing & Pay Dates



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

Apply a Package Discount

Select Plan > Adjust Pricing & Pay Dates



Once applied, it will automatically display the discount.

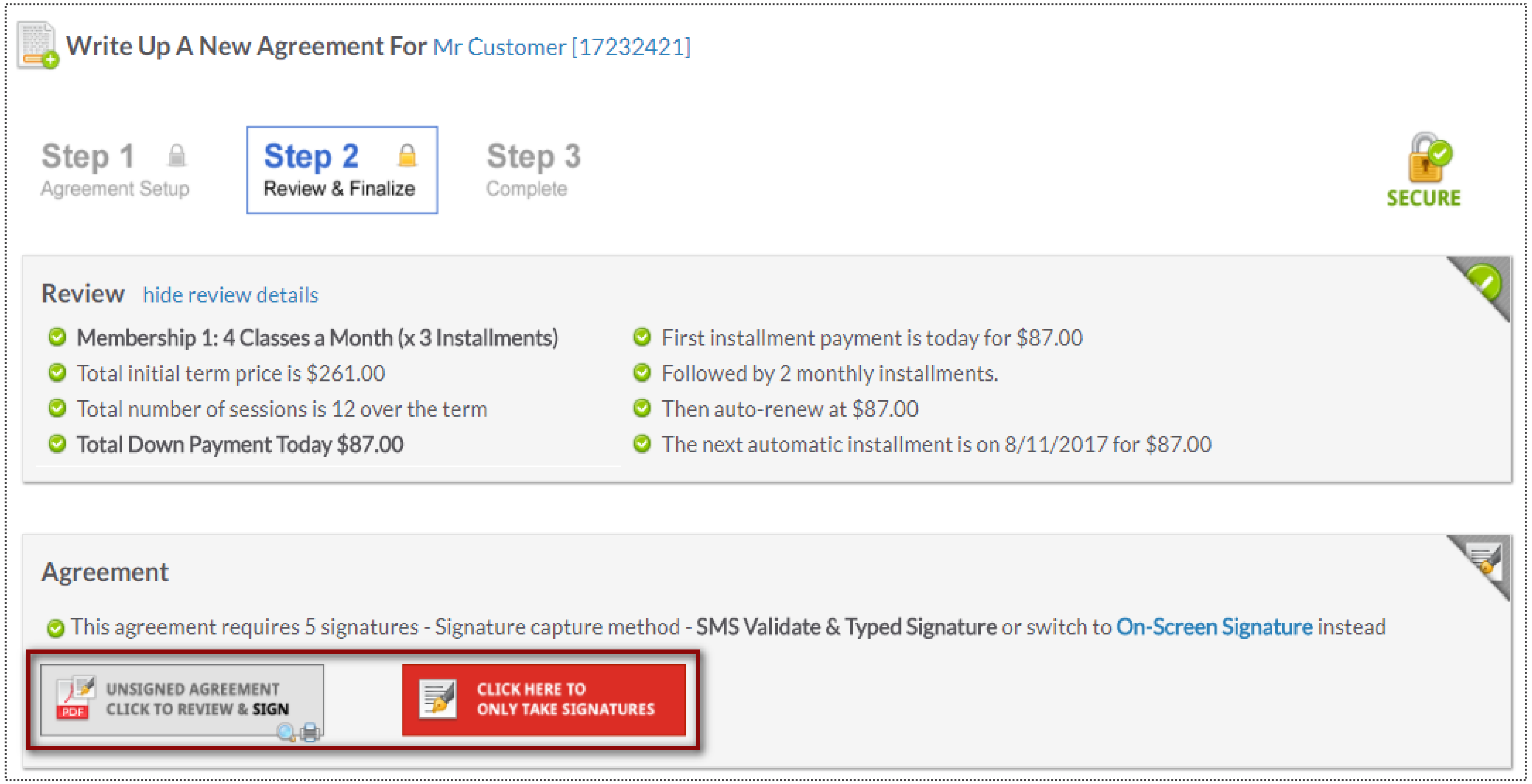
Write Up New Agreement

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.**

Write Up New Agreement

Review Terms > Take Signatures



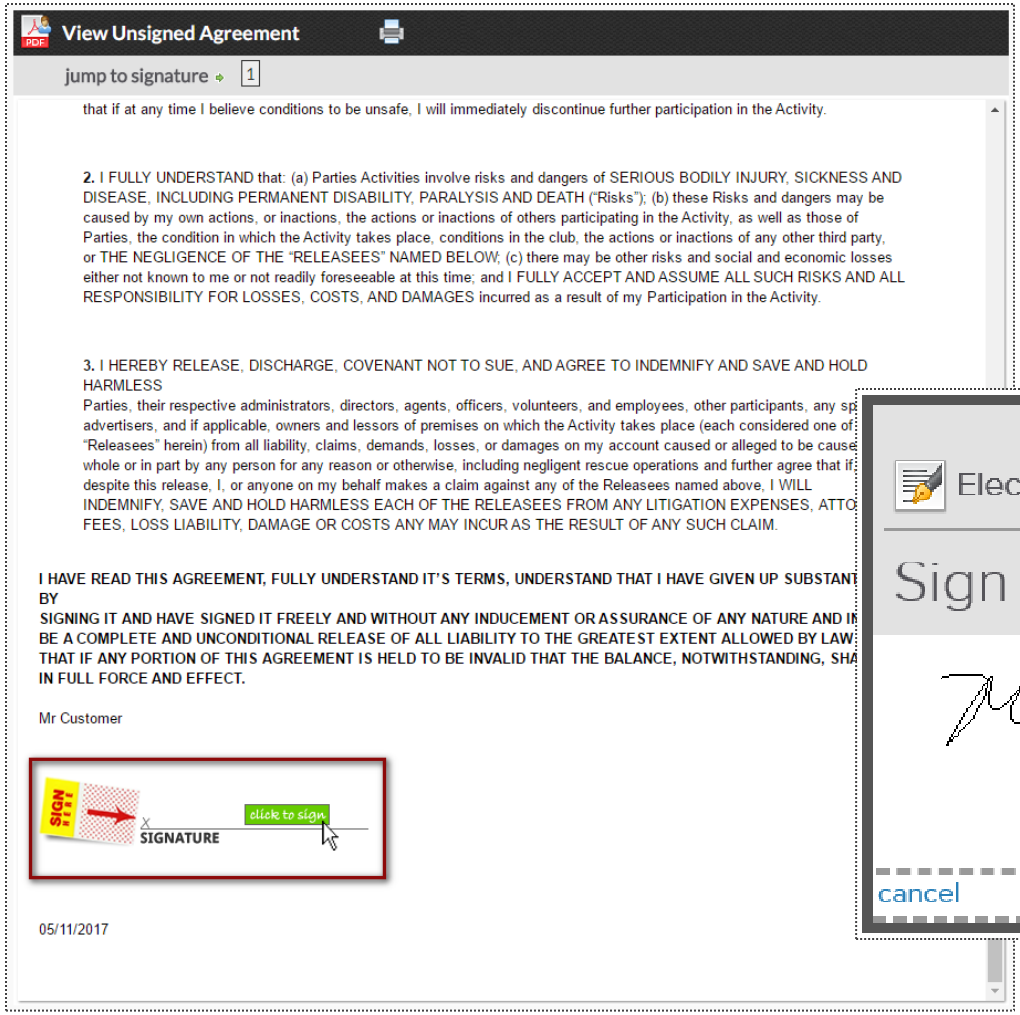
Take a minute to review the terms of the agreement and confirm they are accurate.

Select here to open full agreements for signatures.

CLUB PILATES

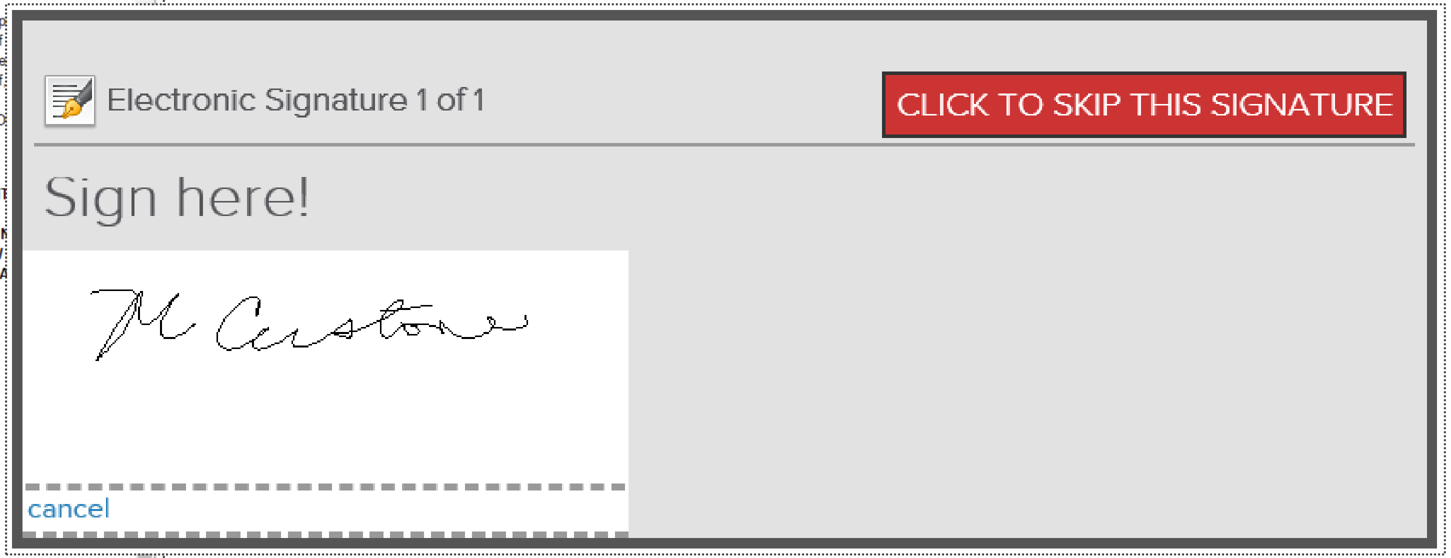
Taking Signatures

Review Contract & Take Signatures



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

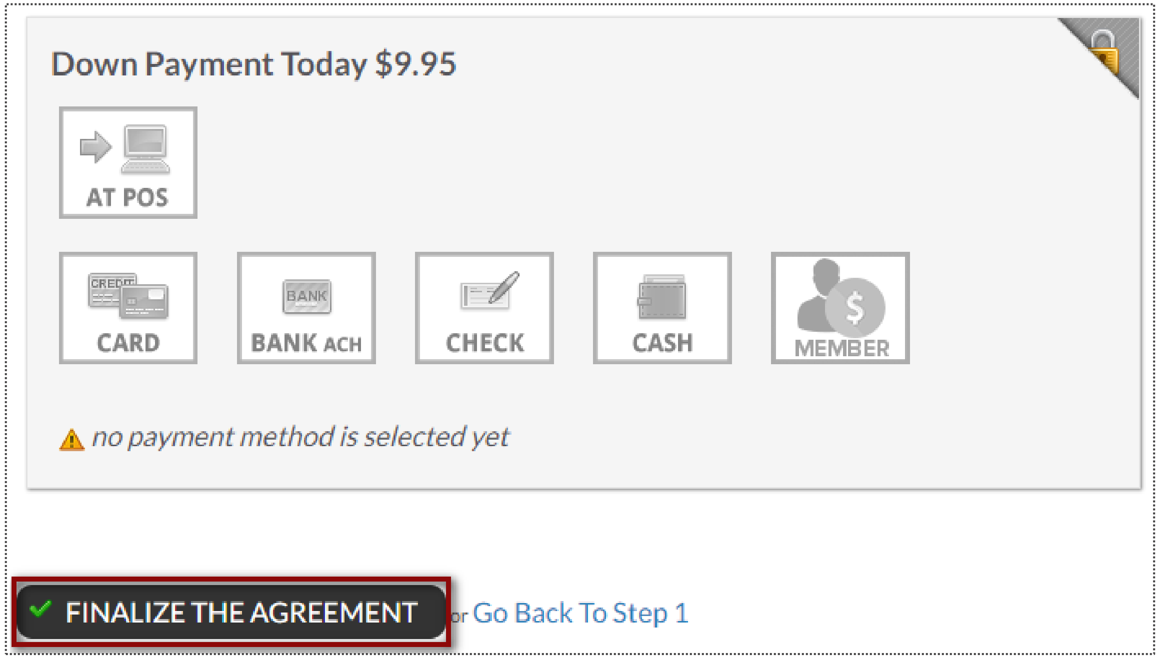
When performing a phone sale, you have the option to skip signatures. Next time the member checks in, they can sign the agreement.



CLUB PILATES

Writing a Membership Agreement

Take Payment & Finalize the Deal

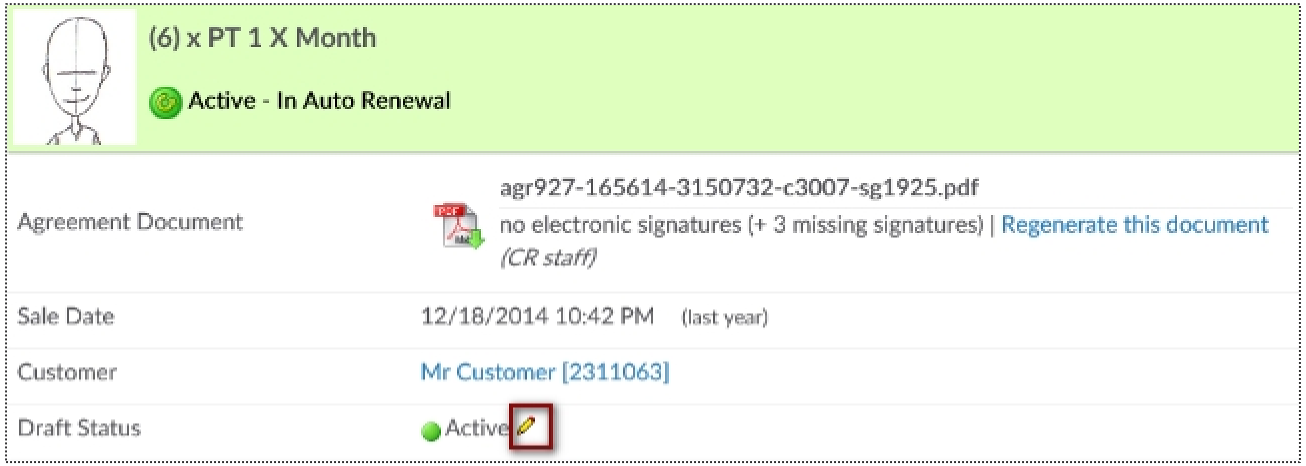


Different methods are available for you to take payment from this screen.

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

Managing Agreement – Draft Status

Member > Agreement > Full Details



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

Managing Agreement – Auto Renew Evergreen

Member > Agreement > Full Details

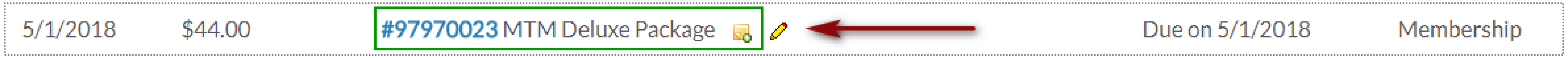
To edit the **Auto-Renew Evergreen** status click the edit pencil next to Yes/No. Yes means this agreement will auto-renew once the term is fulfilled and No means this agreement will only bill through the initial term and billing will stop. You may include an optional note describing why you are editing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

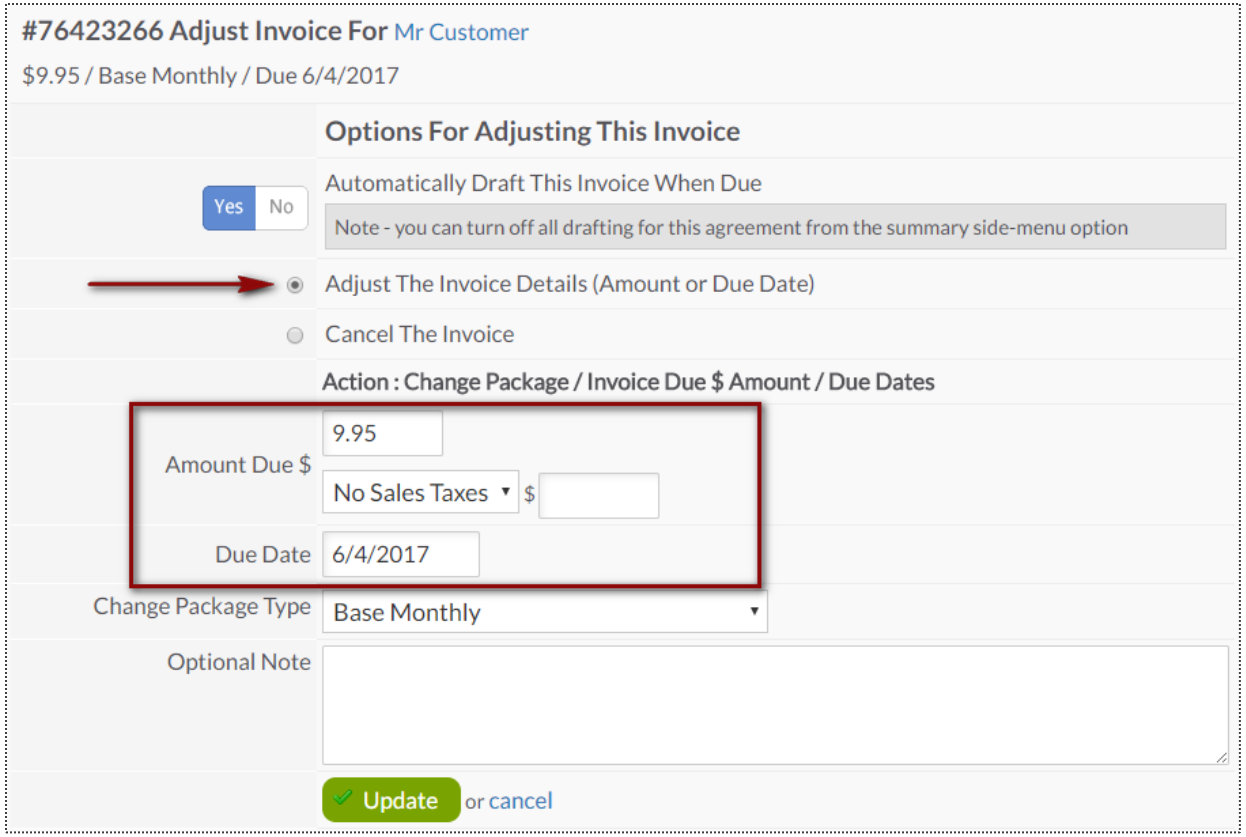
Notes:
Turning OFF auto-renew does not mean the agreement is cancelled. All invoices that are already generated under the agreement Invoices page will still be attempted.
Turning ON auto-renew will generate invoices automatically based on the last unpaid invoice on the account. Please confirm under invoices that there is a future unpaid invoice that will be automatically picked up to use as the auto-renew invoice moving forward. If there is not a future unpaid invoice you will need to Manually Add A New Invoice. Auto-Renew means that once the last shown invoice is paid, the system will generate the next invoice automatically. These invoices will continue to generate until the agreement is cancelled.

Member Management

Invoice Adjustments

Member > Billing > Invoices > Edit Pencil



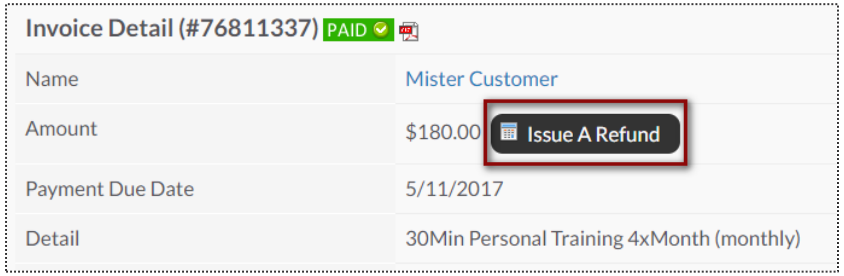


Selecting the option **Adjust The Invoice Details** will update the screen to display all options you can adjust for this one invoice. Make the desired changes to the invoice. Click the **Update** button to save changes.

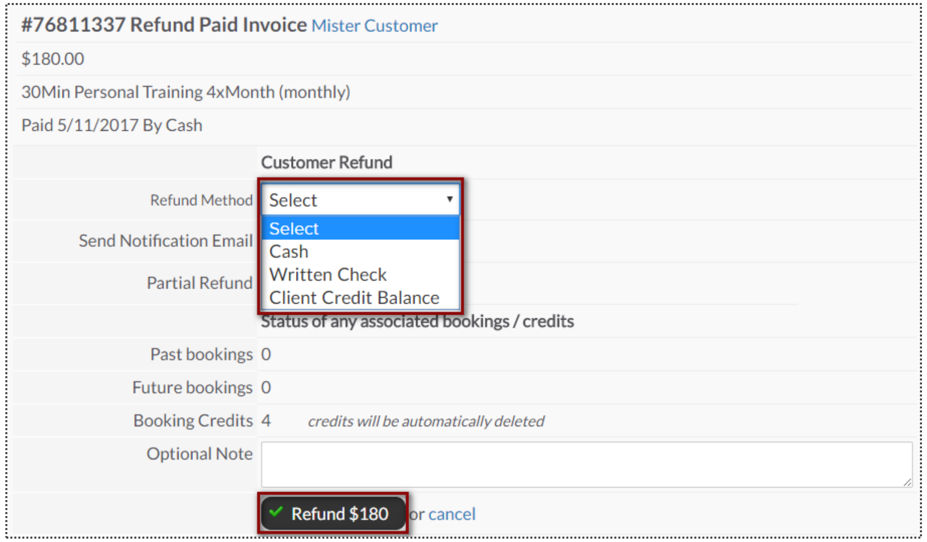
CLUB PILATES

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**.**

CLUB PILATES

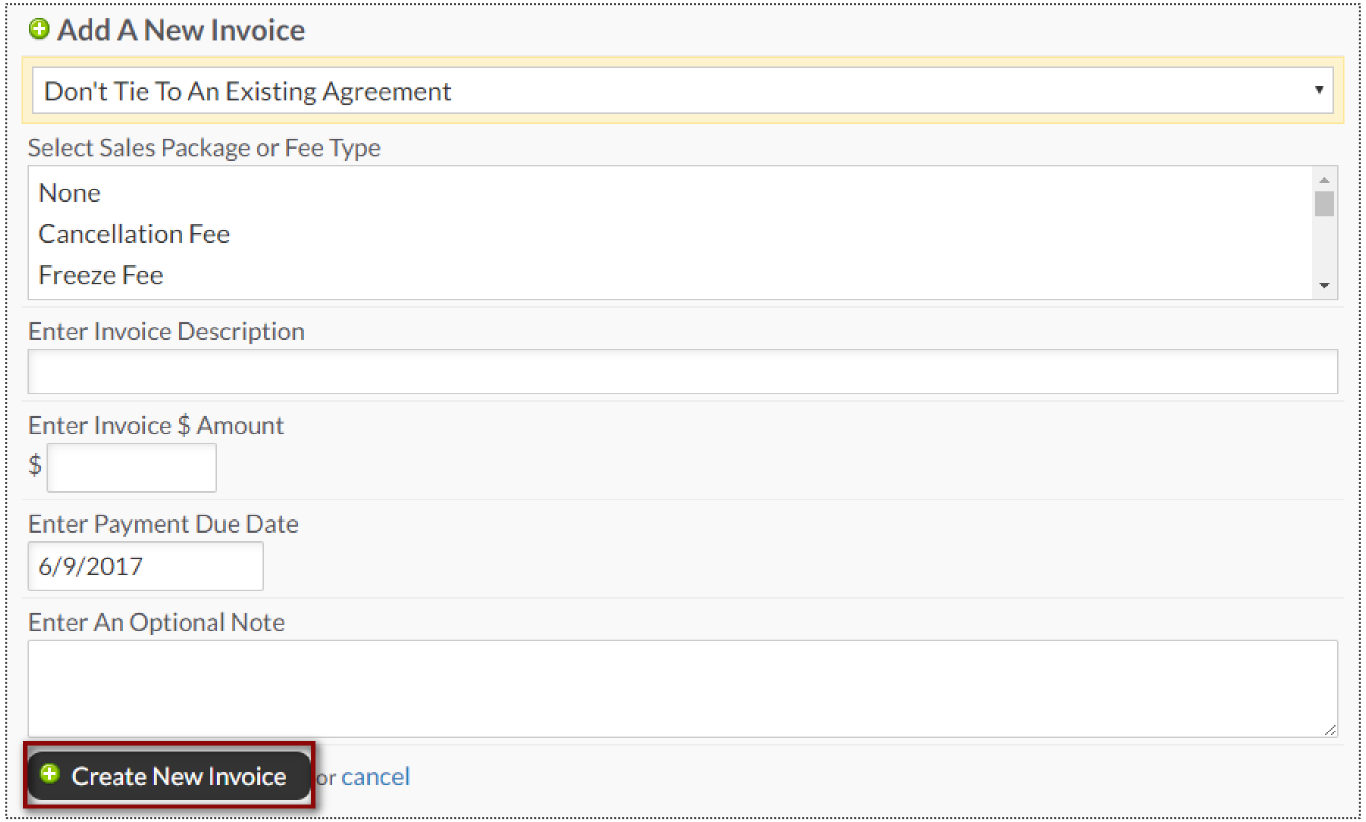
Adding a New Invoice

Member > Billing > Invoices

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

Adding a New Invoice

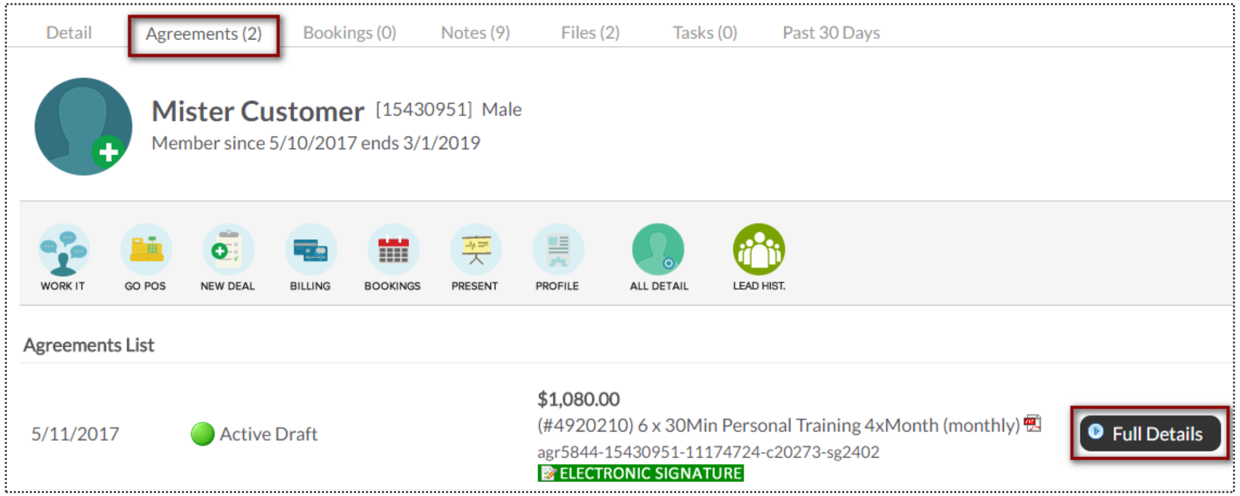
Member > Billing > Invoices > Add A New Invoice

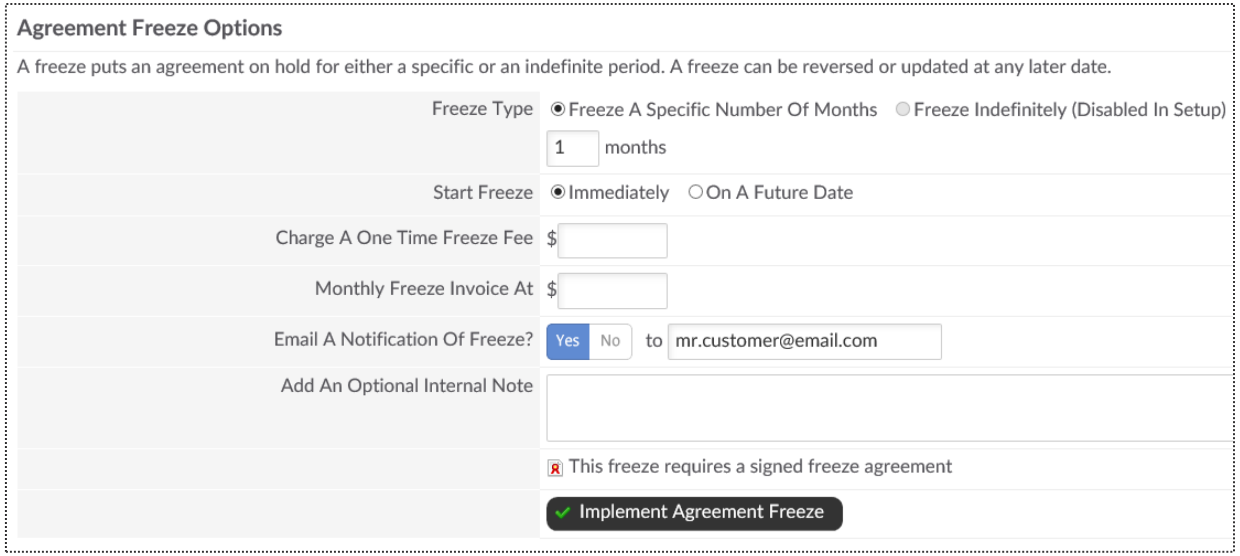


You have the option from here to **Tie to An Agreement, Select A Sales Package or Fee Type, Invoice Description, Invoice Amount, Payment Due Date and an Optional Note.** To finalize, click **Create New Invoice**

Freeze an Agreement

Member Account > Agreements > Full Details > Freeze Options



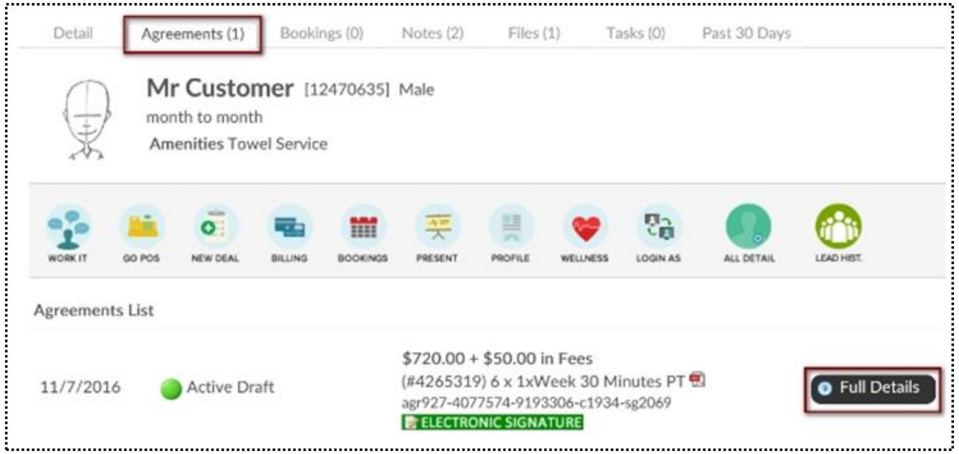


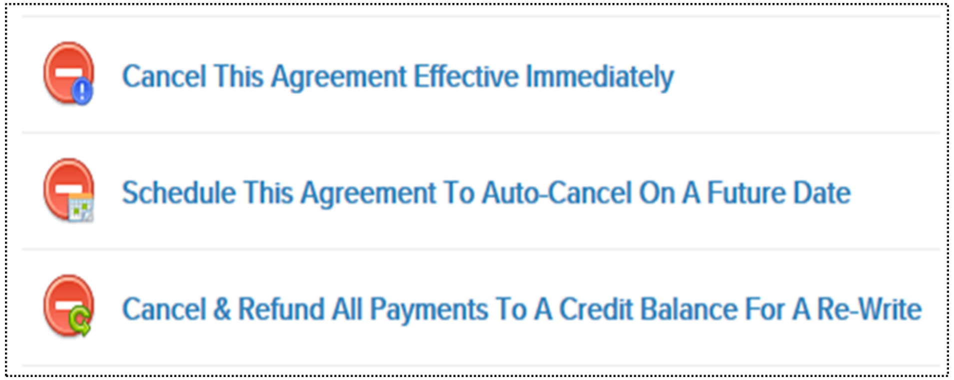
From this screen you can select the following: **Freeze Type, Start Freeze, Charge A One Time Freeze Fee / Monthly Freeze Invoice, Membership Expiration, Email Notification of Freeze.**

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

Cancel an Agreement

Member Account > Agreements > Full Details > Cancel This Agreement





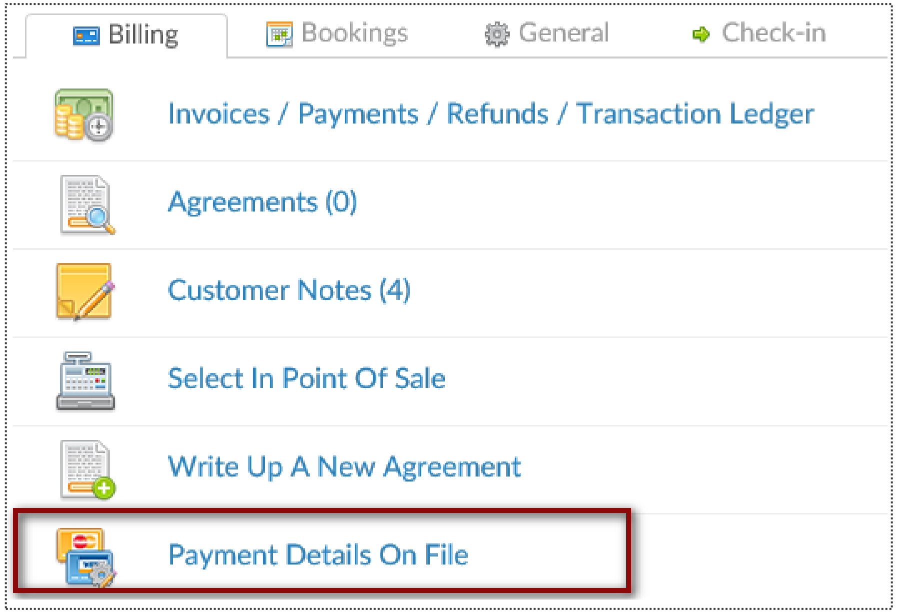
Cancel This Agreement Effective Immediately: This agreement will be cancelled today. All unpaid invoices will be cancelled.

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.

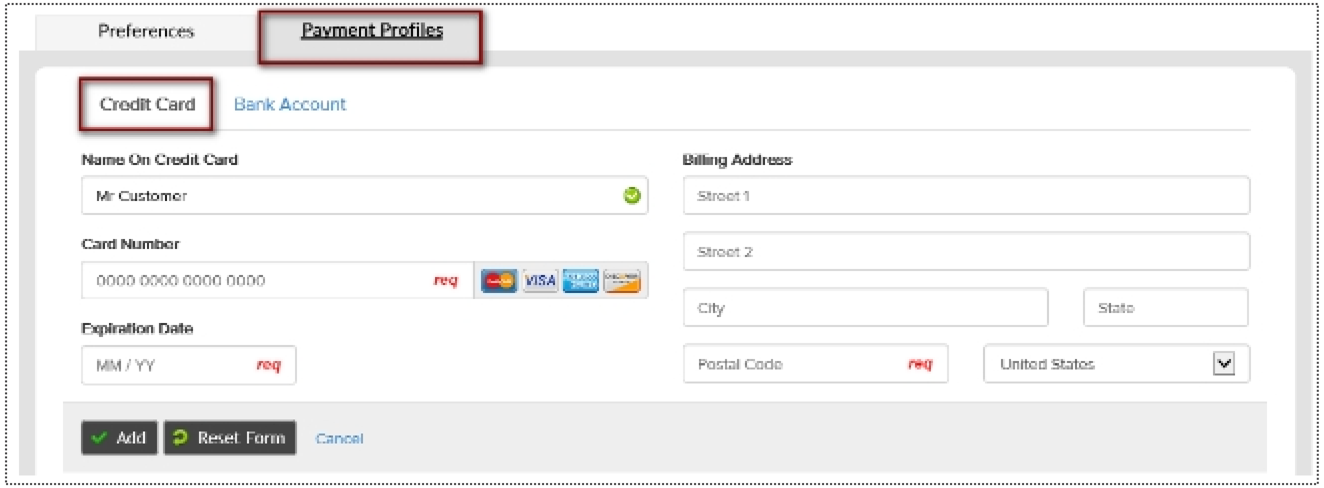
Add/Update Credit Card on File

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



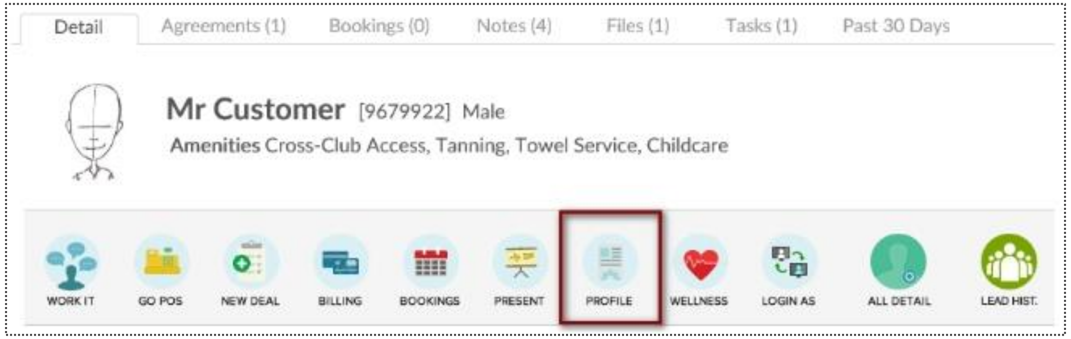
To add a new bank account select the **New Payment Profile** button. Click on Bank Account tab to enter the client's bank account information. Select the **Add** button to save the information.

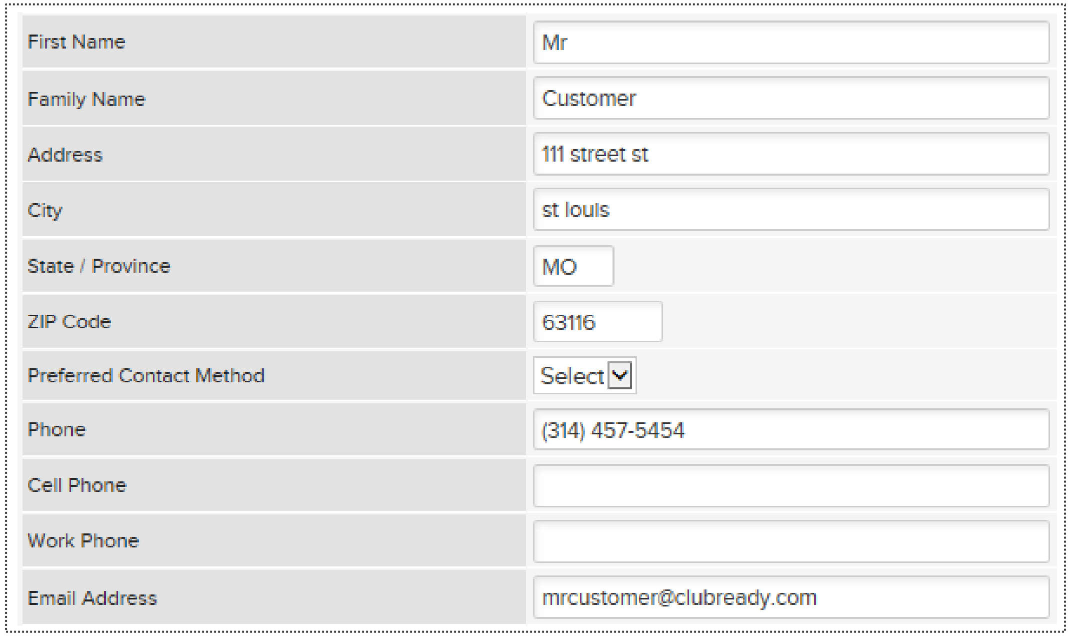
To add a new credit card select **New Payment Profile** button. Click on Credit Card tab to enter the client's credit card information. Select the **Add** button to save the information. If you just need to update the expiration date click the edit pencil next to the existing payment profile.



Update Member's Profile

Member Account > Profile





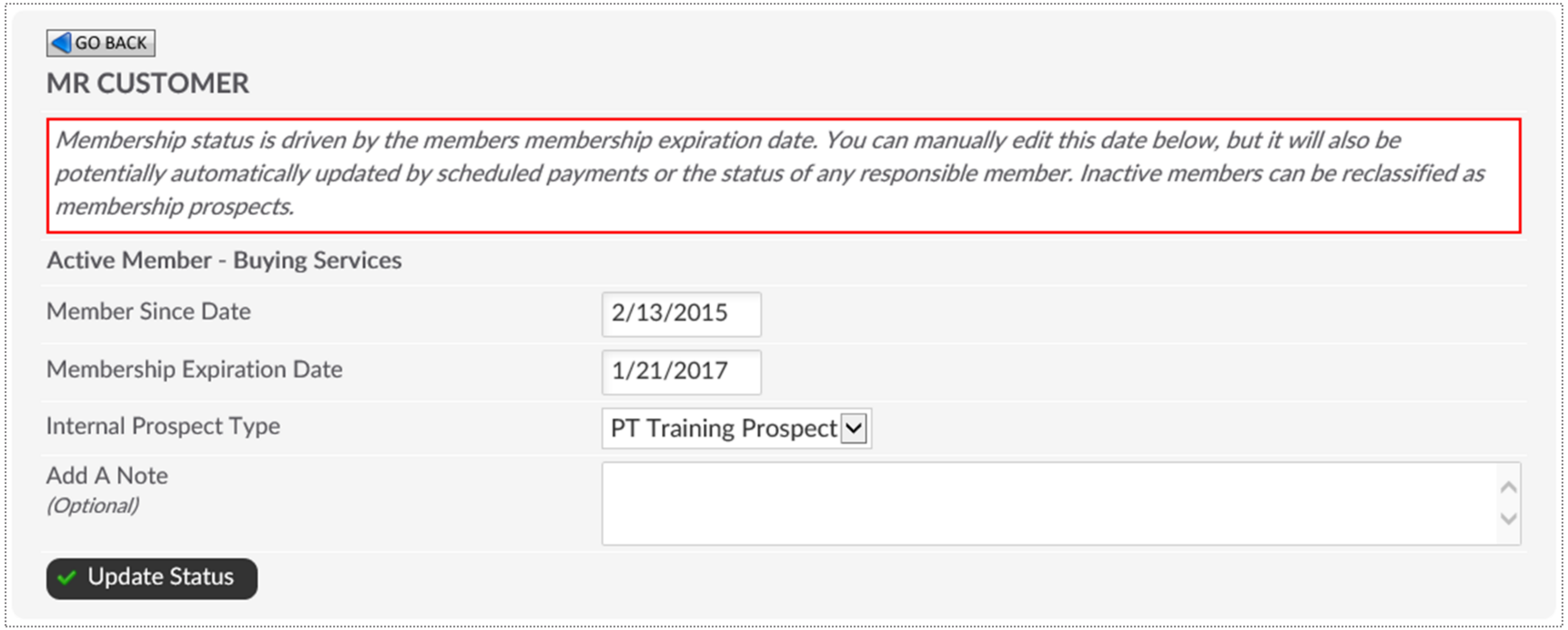
First Name	Mr
Family Name	Customer
Address	111 street st
City	st louis
State / Province	MO
ZIP Code	63116
Preferred Contact Method	Select
Phone	(314) 457-5454
Cell Phone	
Work Phone	
Email Address	mrcustomer@clubready.com

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

CLUB PILATES

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.

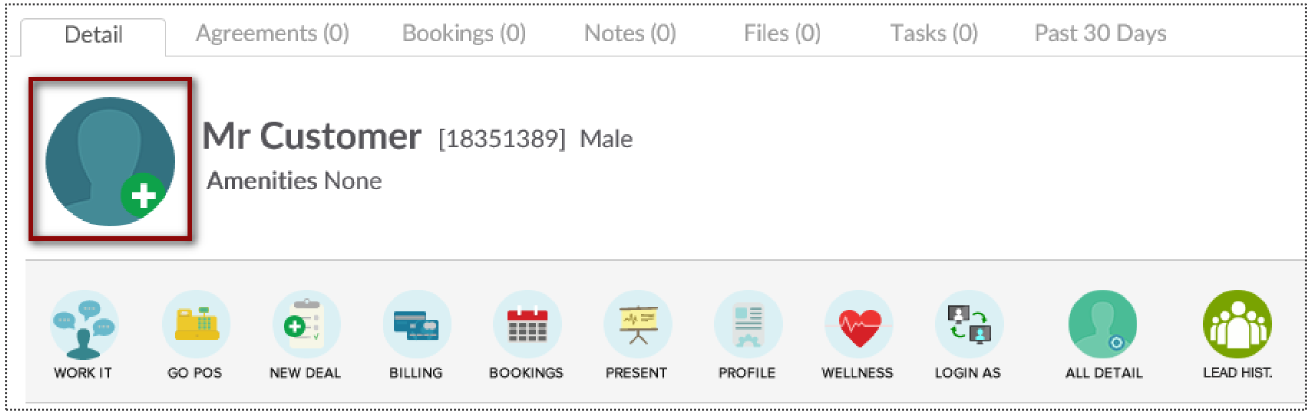
Membership Expiration Date -This date is based off of the member's membership package. Adjust the expiration date on PIF (Annual) members to **1 year after Opening Day**.

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

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

Add A Photo

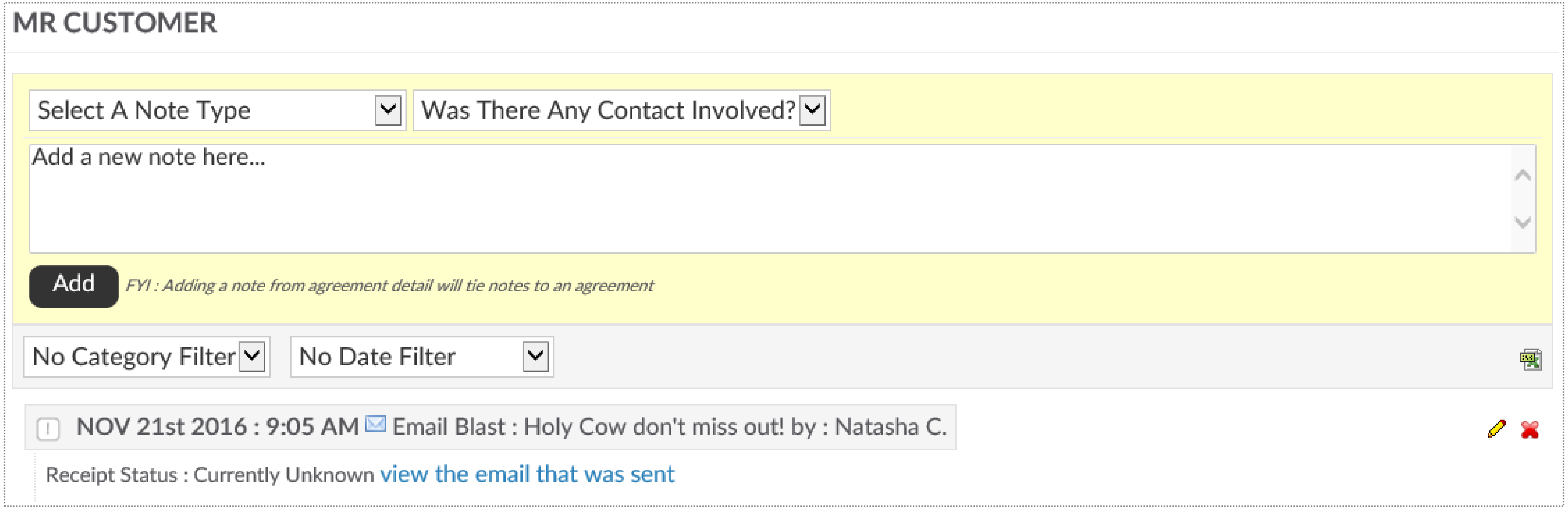
Member Account > Green Plus Sign



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

Member Notes

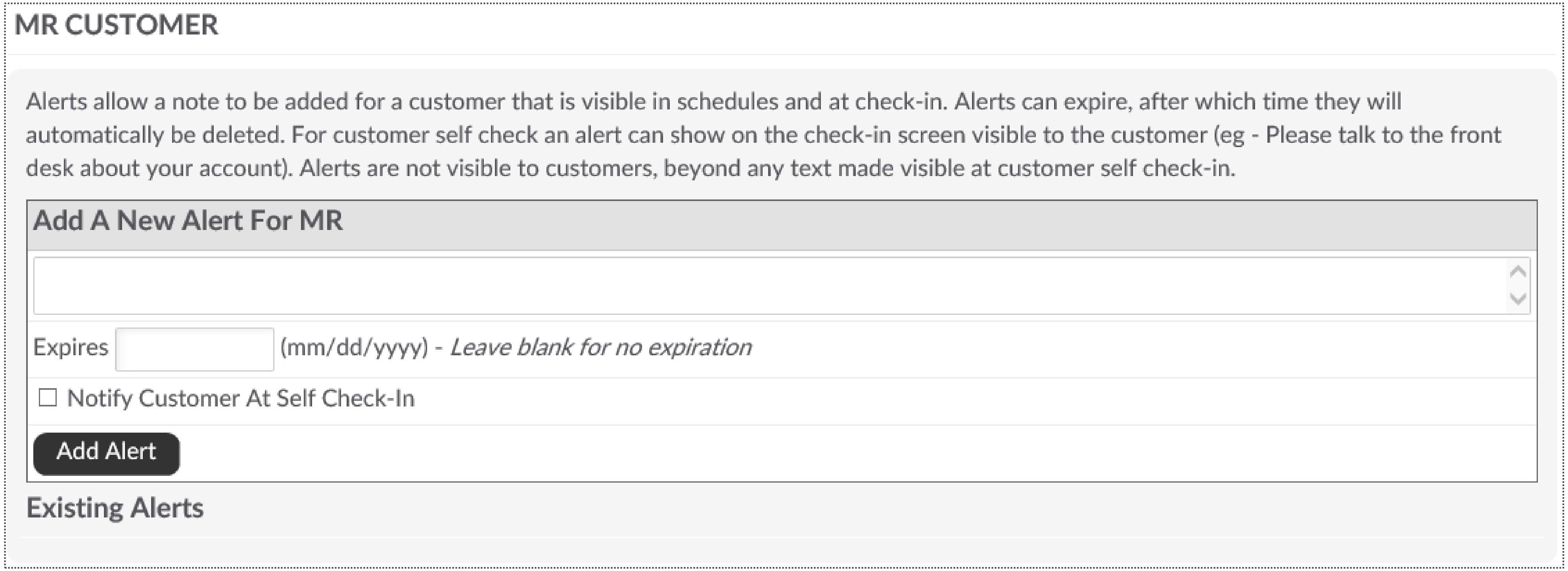
Member Account > All Detail > Member Notes



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

Add a Member Alert

Member Account > All Detail > General > Alerts


MR CUSTOMER

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

Add A New Alert For MR

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

☐ Notify Customer At Self Check-In

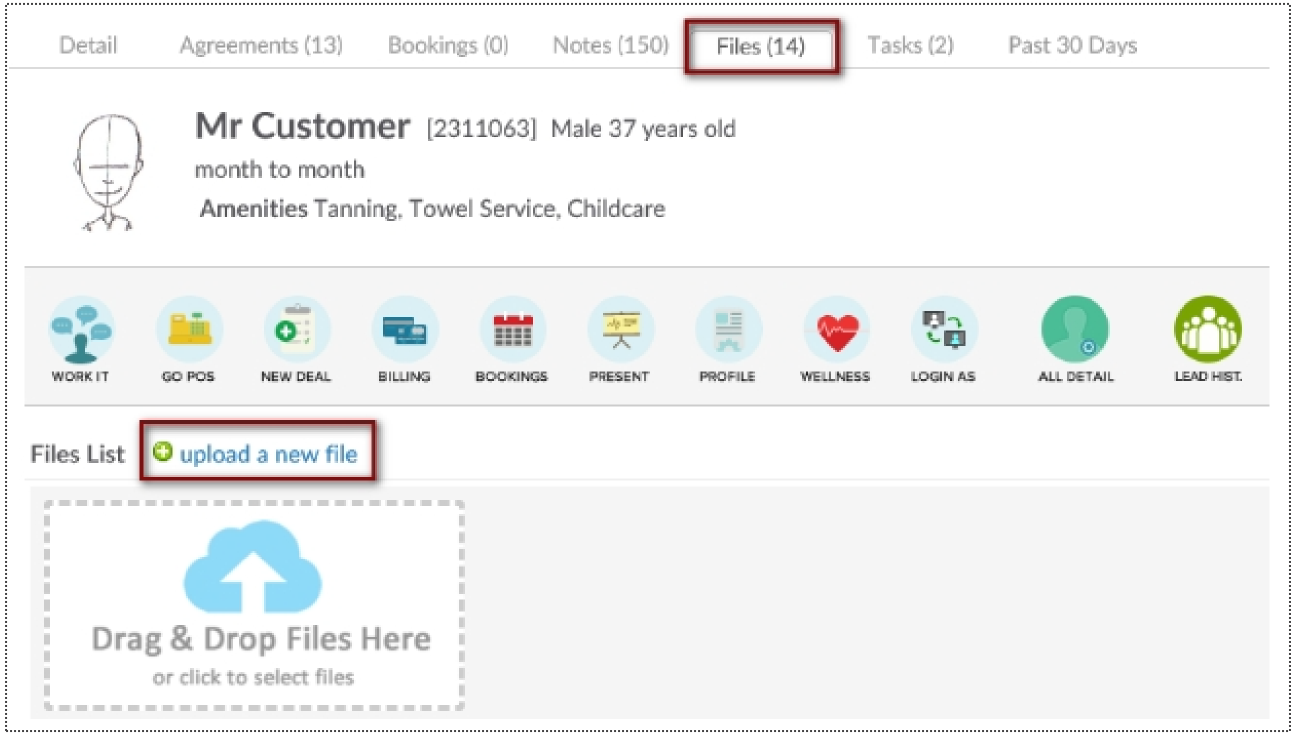
Add Alert

Existing Alerts

This **Alerts** function is particularly helpful in reminding staff to take a member's signature on an unsigned agreement. (Such as when the agreement was sold over the phone)
The **Add A New Alert** field allows you to enter a new message for staff.
The **Expires** field allows you to enter the date you wish the alert to expire. Leave this blank for if you do not wish for it to expire.
The **Notify Customer At Self Check-In** box allows you to enter the message you wish the customer to see. If selected the customer would immediately be notified, upon check-in, of the alert.

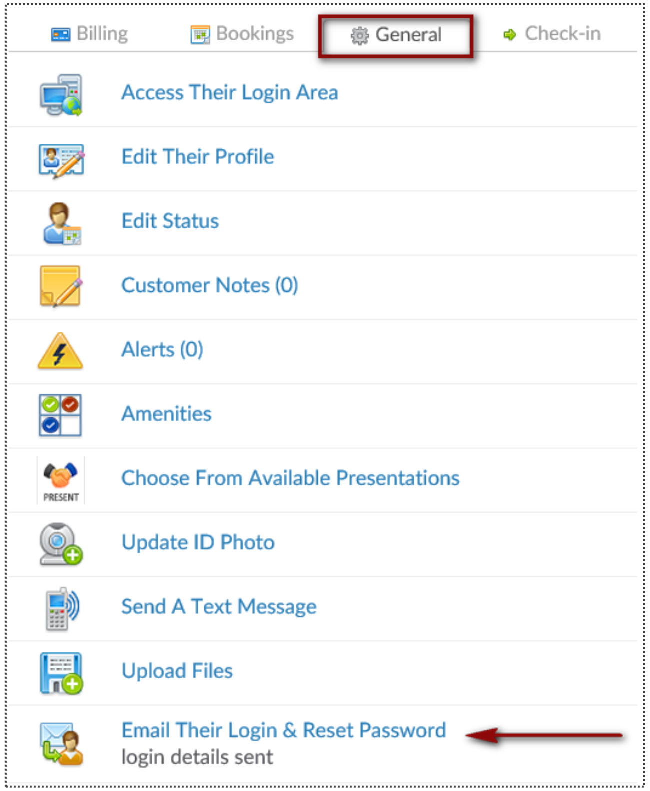
Upload File To Client's Profile

Setup > General > File Folders



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

Email Login & Reset Password



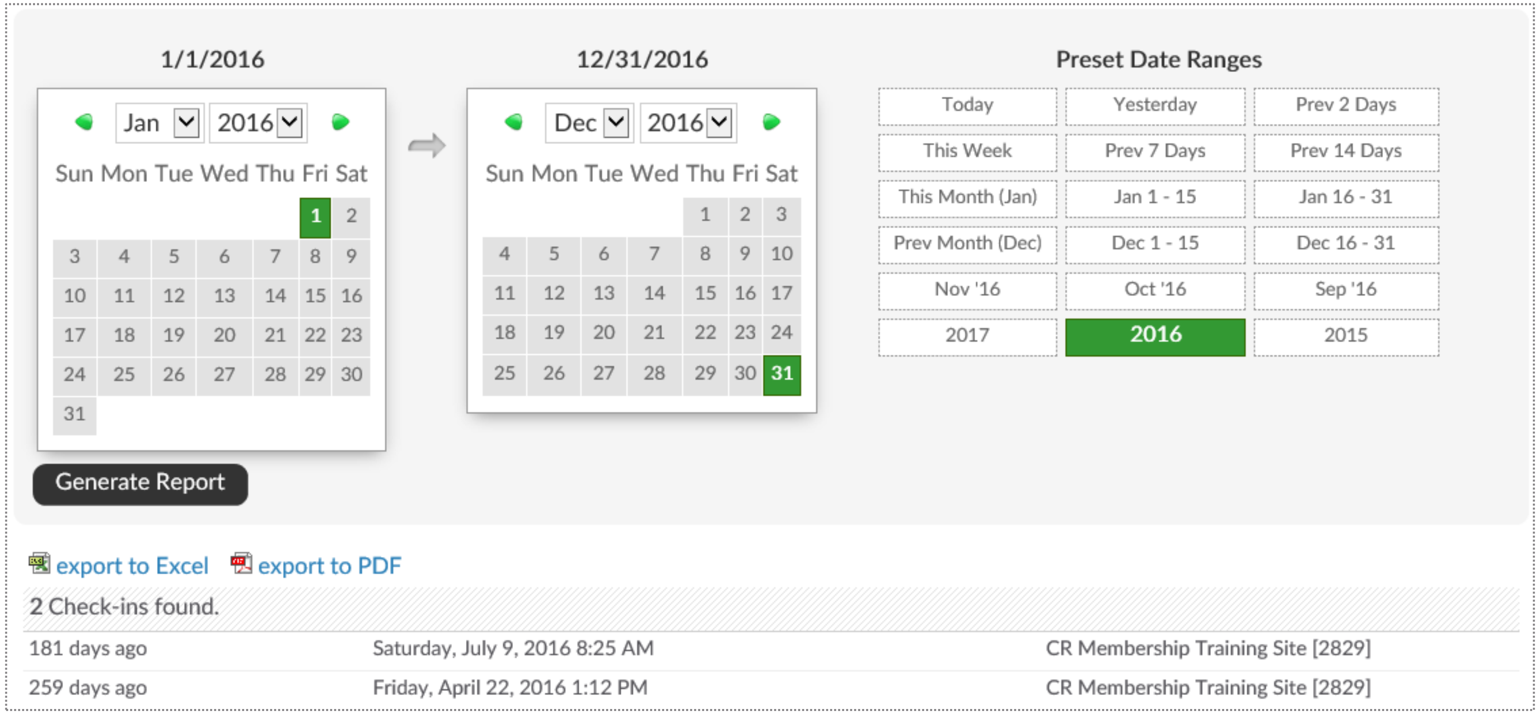
To access this screen click search and select the desired client. Verify the client has an email address, if not click the edit pencil to enter one. Click the **All Detail** button.

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

CLUB PILATES

View Check – In History

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

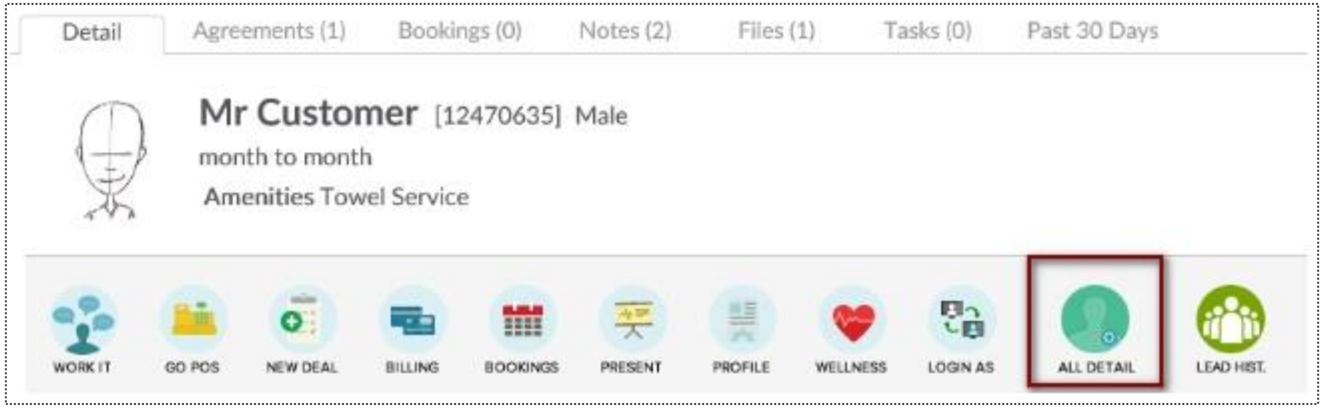


To generate this report, select the date range and click to **Generate Report.** The results will display on screen and show the number of check-ins, date of the check-ins, and the club location of the check-ins.

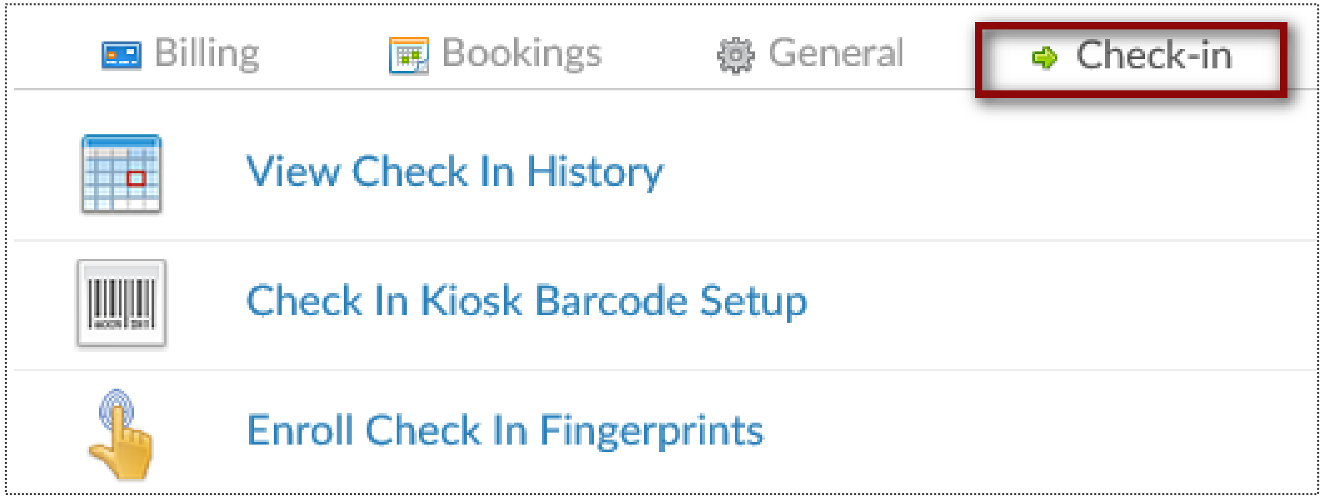
This data can also be exported by clicking on **export to Excel** or **export to PDF** and will contain the same information as the on screen report.

CLUB PILATES

Update Barcode/Fingerprint

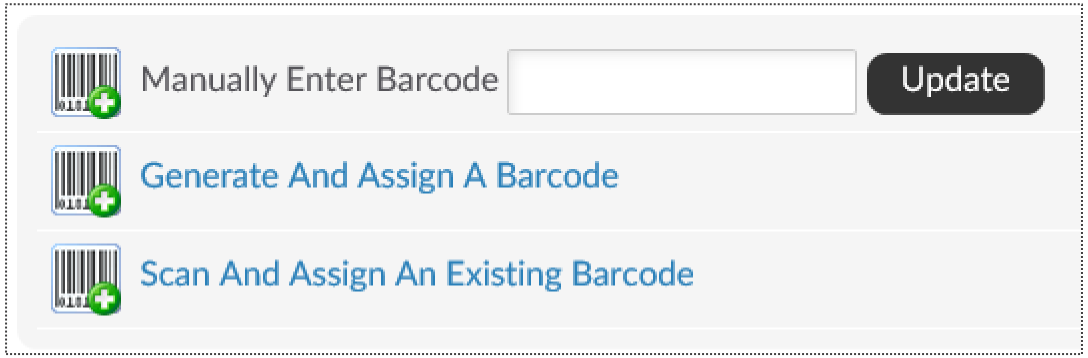


Find the Prospect or Member/Customer you wish to assign or update a barcode for. Click on the **All Detail** button > **Check In** tab.

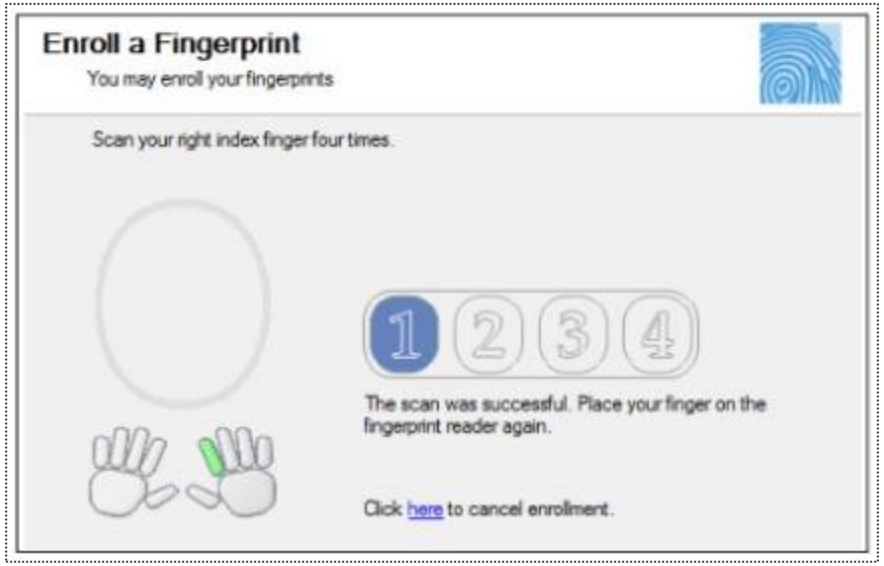


Choose if you are needing to update their barcode or fingerprint. This will be prompted by your Check In Web Kiosk settings under the Setup tab.

Update Barcode/Fingerprint



Manually Enter Barcode - type in the barcode number
Generate And Assign a Barcode - Have ClubReady assign a barcode number
Scan And Assign An Existing Barcode - If you have a ClubReady approved keytag scanner (not orbital) you can scan the barcode after clicking this option



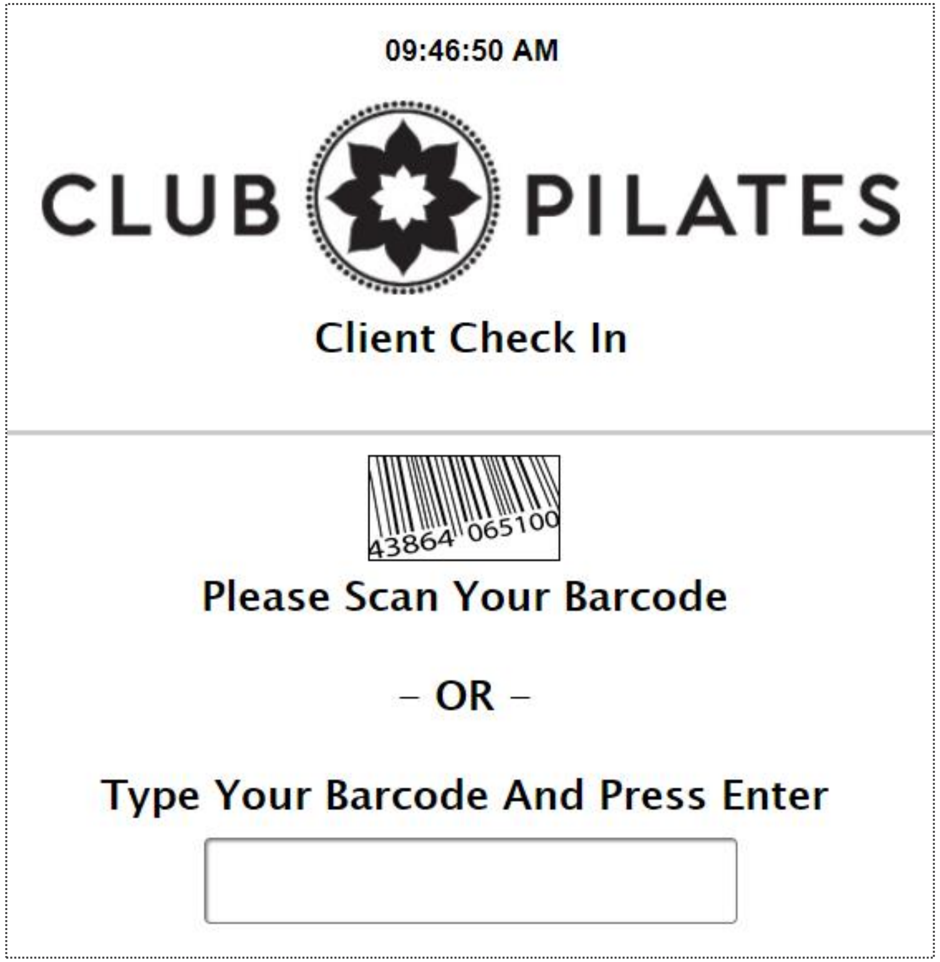
Click on a digit to advance to the next step in the fingerprint enrollment process

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

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

CLUB PILATES

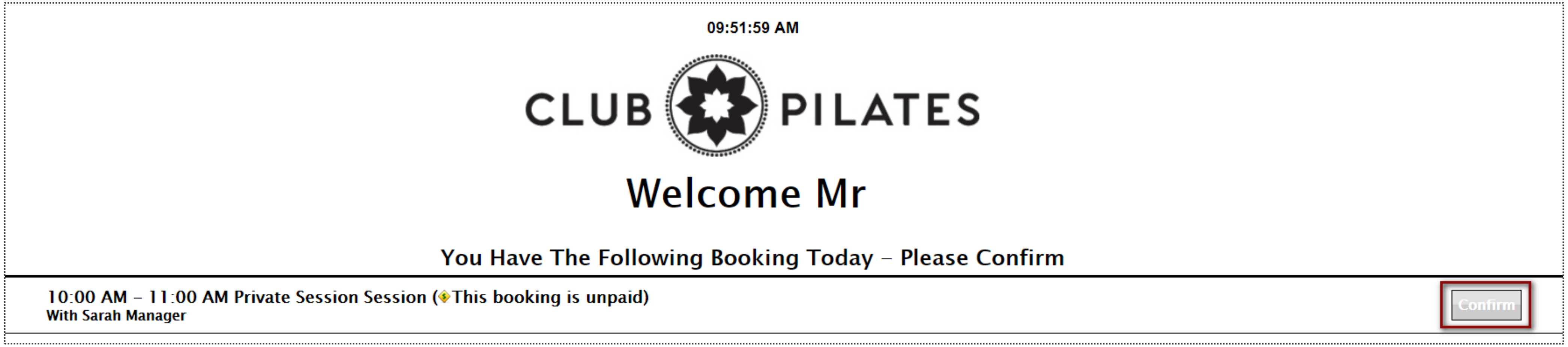
Check In Web Kiosk



After logging in to activate the kiosk the screen will update requesting you check in a client.

Redeem Session Through The Kiosk

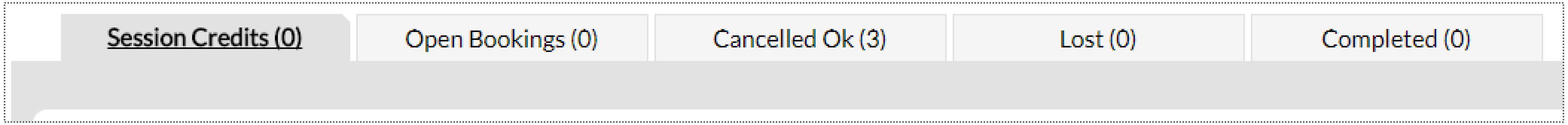
Confirm Member Booking Through The Kiosk



Members will use their barcode to confirm their scheduled booking. The screen will display the Booking Details including time, session type and trainer. Members will click **Confirm** to redeem their session.

View Session Credit Status

Member Account > Bookings > Bookings & Session Credit Status



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

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

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

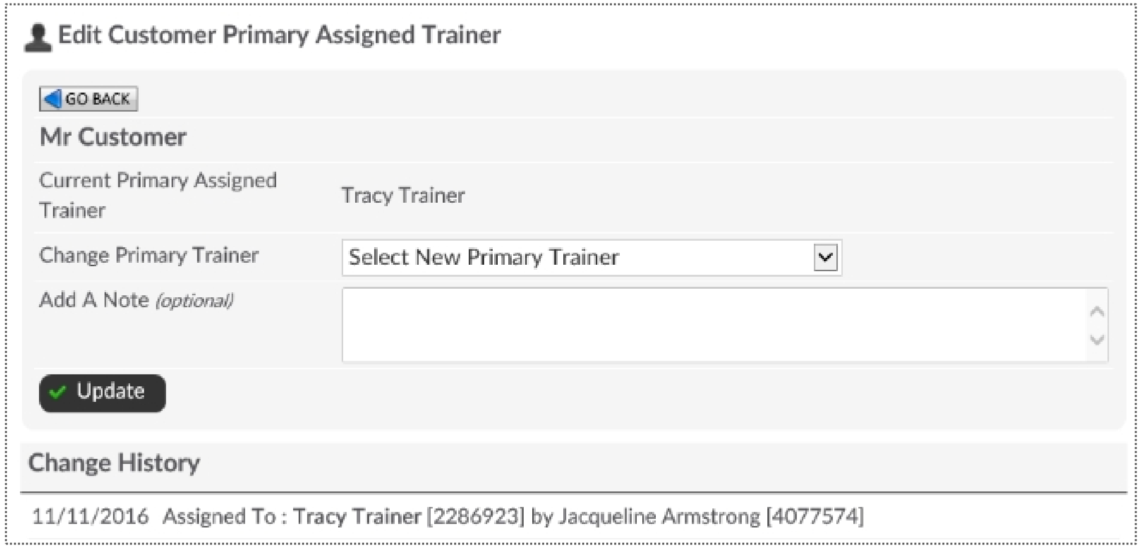
Cancelled Ok Tab: Bookings that were cancelled (or rescheduled) with no loss to the customer at the time of cancellation.

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

Completed Tab: Bookings that have been successfully completed

Assign Primary Trainer

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



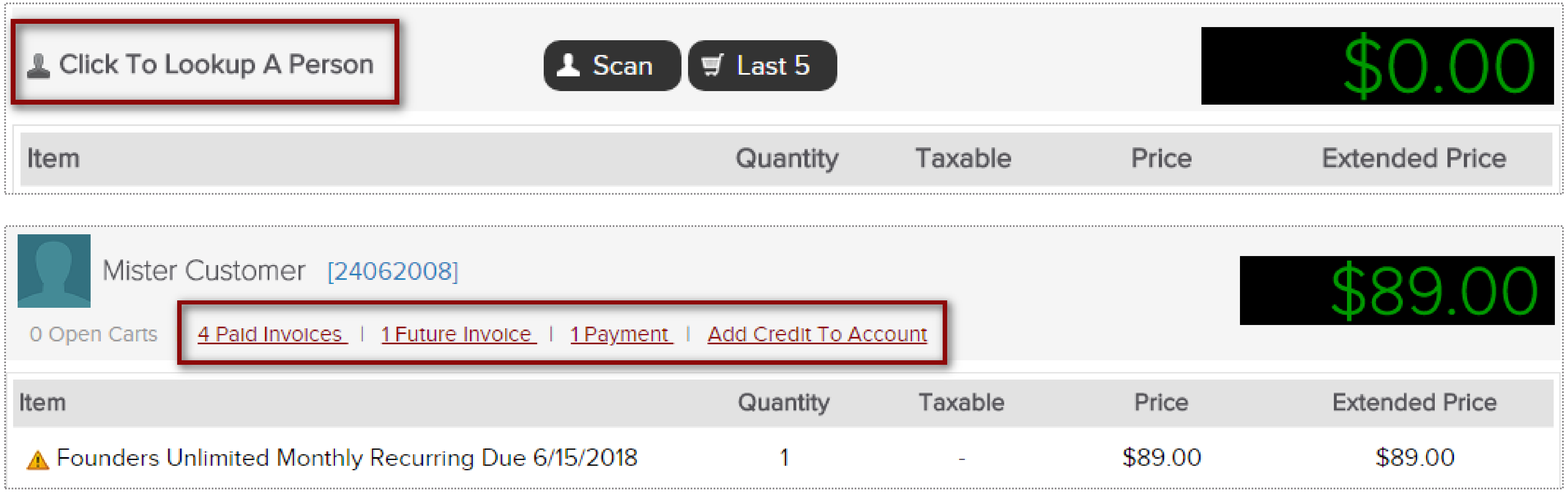
If a current trainer is assigned you will see the name of that trainer next to **Current Primary Assigned Trainer**. To add or change this choose an name from the **Select New Primary Trainer** drop-down. Click **Update**. Any changes made to a customer's primary trainer will be recorded and can be viewed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

CLUB PILATES

POS & Inventory

Point Of Sale

Main > POS

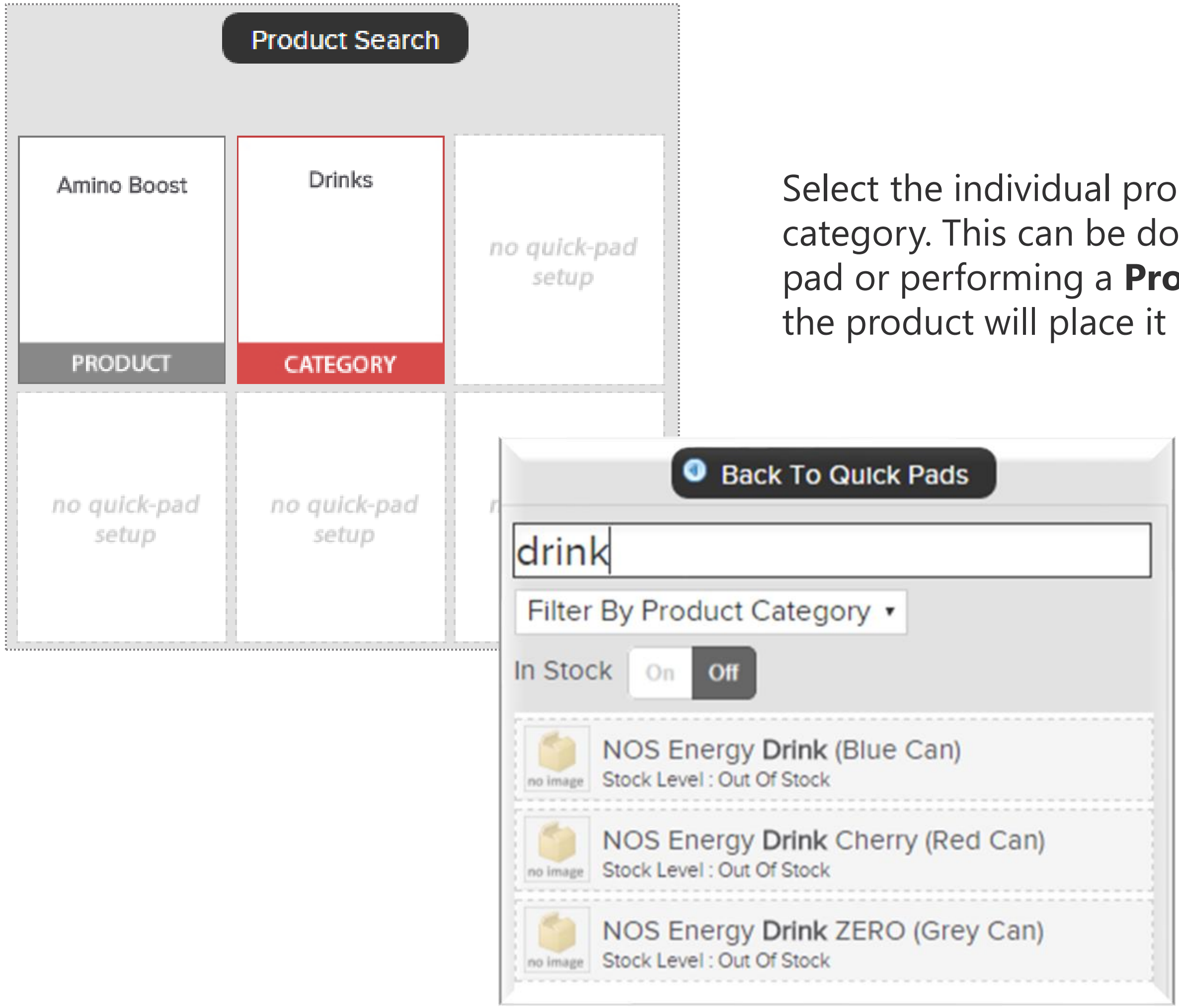


The POS is used for taking payment on past due and future invoices as well as for selling merchandise. To pull a client into the POS, select the **Click to Lookup a Person** button.

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

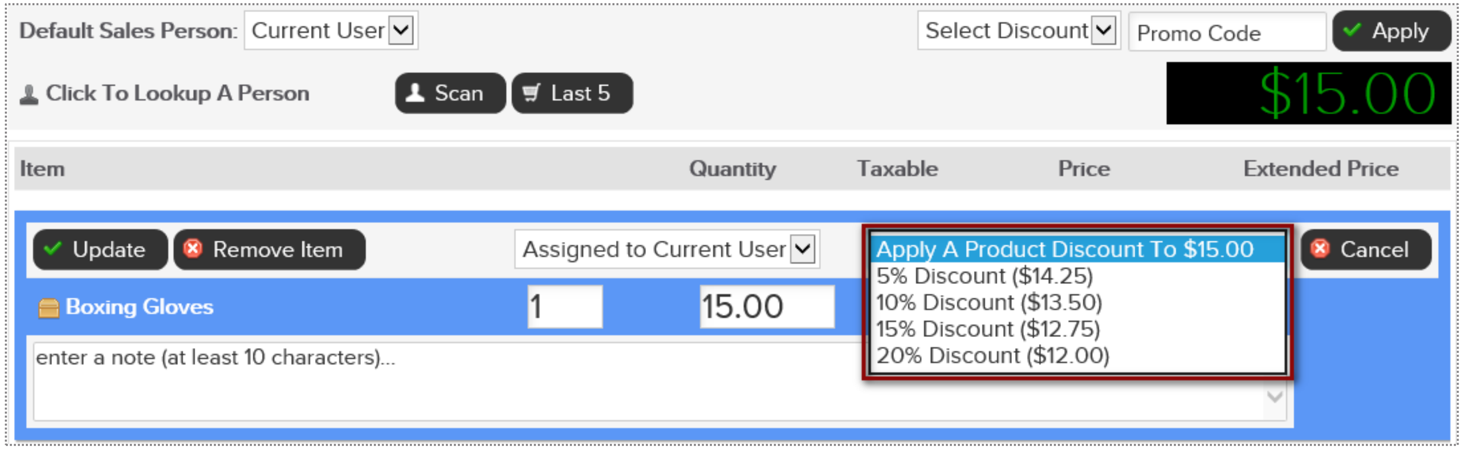
Main > POS



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.

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.

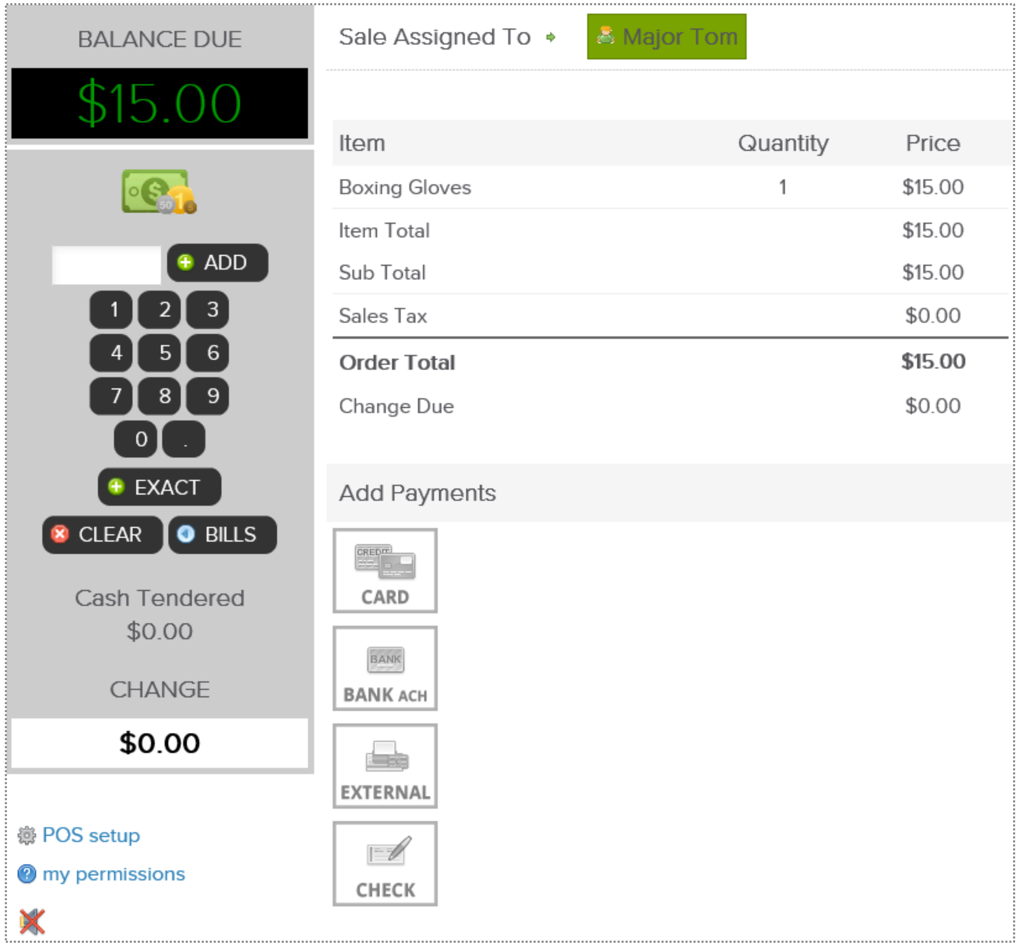


Adjustments may include; modifying the quantity, price, applying a discount or removing the product from the shopping cart.

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

Finalizing the Purchase

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.

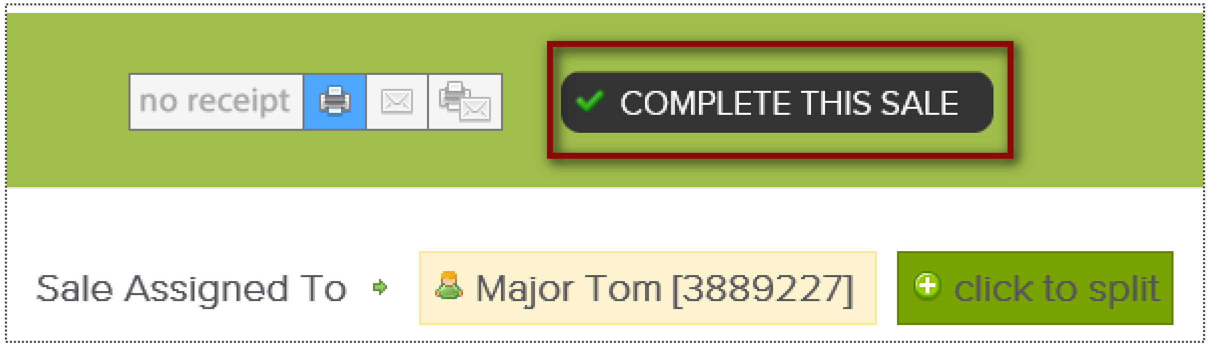
If a customer is paying by cash, select the quick cash amount or click PAD, to enter a specific dollar amount.

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.

CLUB PILATES

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.

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.

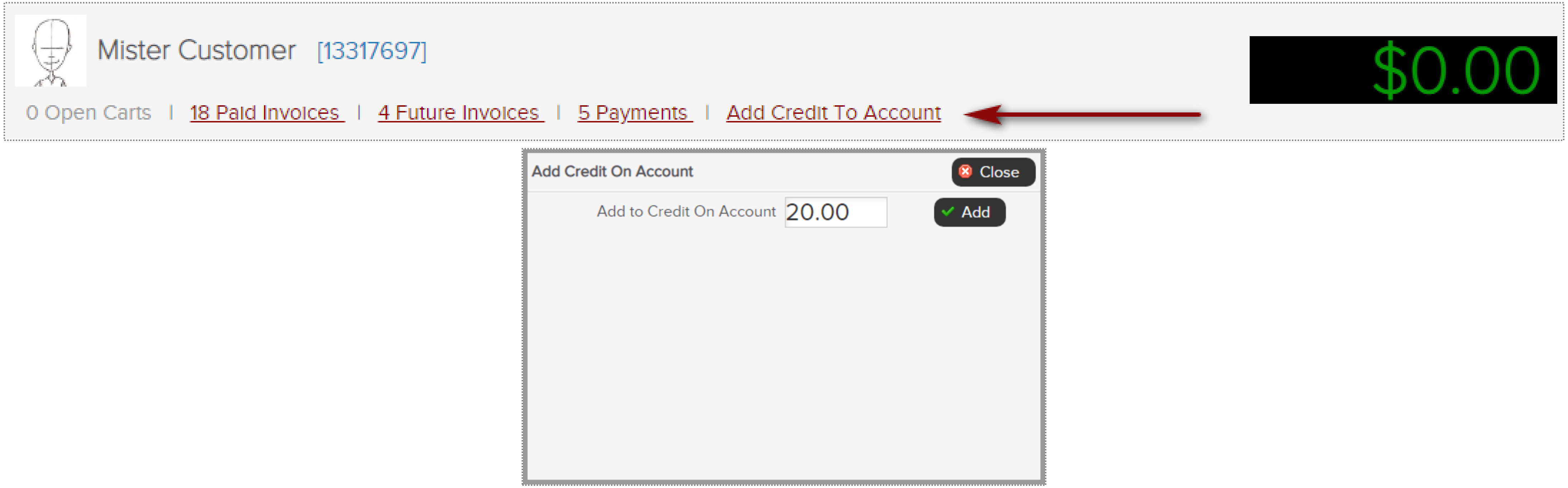
Cardholder transaction not permitted - This response indicates that the card issuing bank is declining the transaction for unspecified reasons. The response doesn't necessarily indicate that there is a problem with the card; however, it does indicate that the bank won't approve this transaction.

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

CLUB PILATES

Point of Sale: Adding Credit on Account

Main > POS



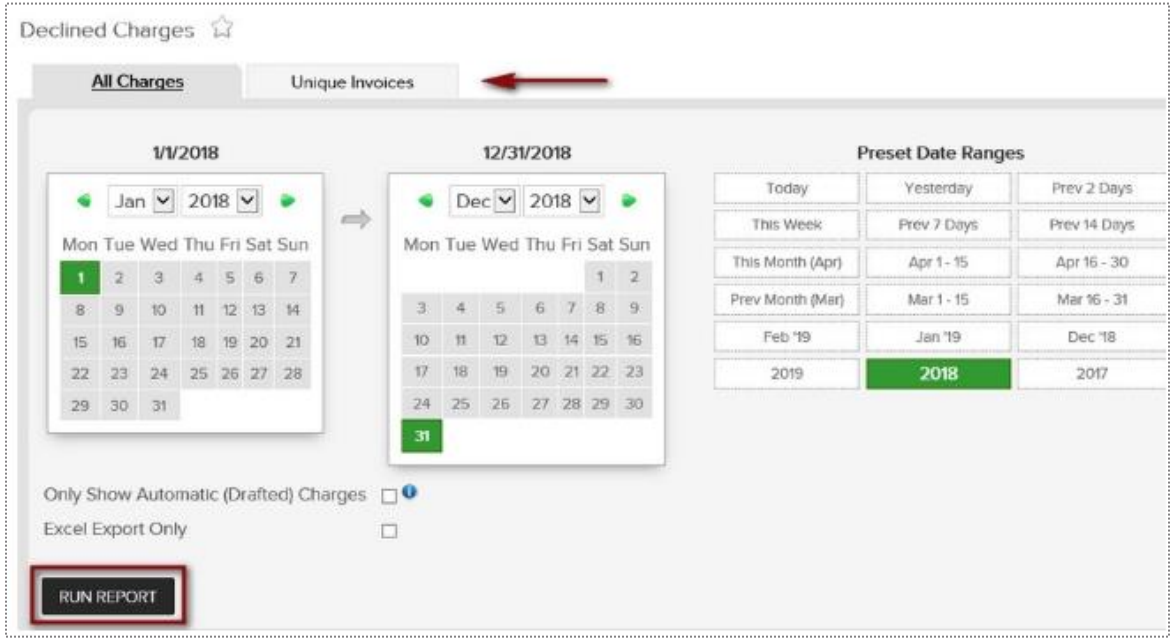
The POS also allows for staff to apply a gift card to a member’s account. First, select the customer receive the gift card. Click **Add Credit To Account**. Type the amount that is being applied.

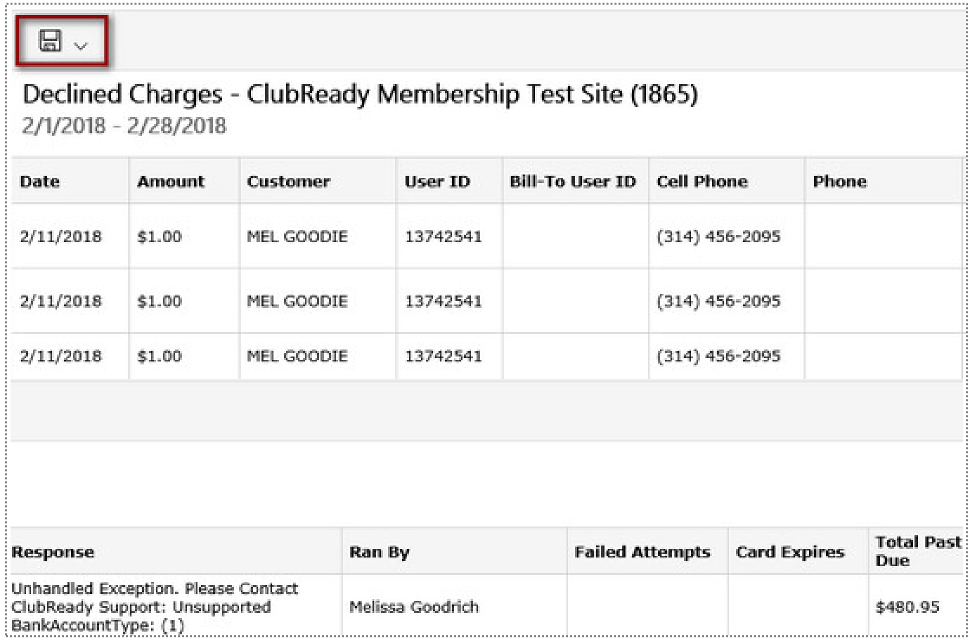
Select **CHECKOUT** to continue. Different payment methods will be displayed. Select the correct method.

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

Declined Charges Log Report

Reports > Sales > Declined Charges Log





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

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

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

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

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

Bulk Upload Inventory

Reports > Products > Bulk Upload Inventory

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

Navigate to **Reports > Products > Inventory.** Use the drop down box to **Filter By Product Category** and use checkbox options if needed.
To create an Excel export with all products listed then leave the drop down menu blank and uncheck **Don't Show Products That Have Never Been Sold And Have No Stock Level.**
Click on the Excel **export (also used as template for bulk adjust tool)** link.

Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory

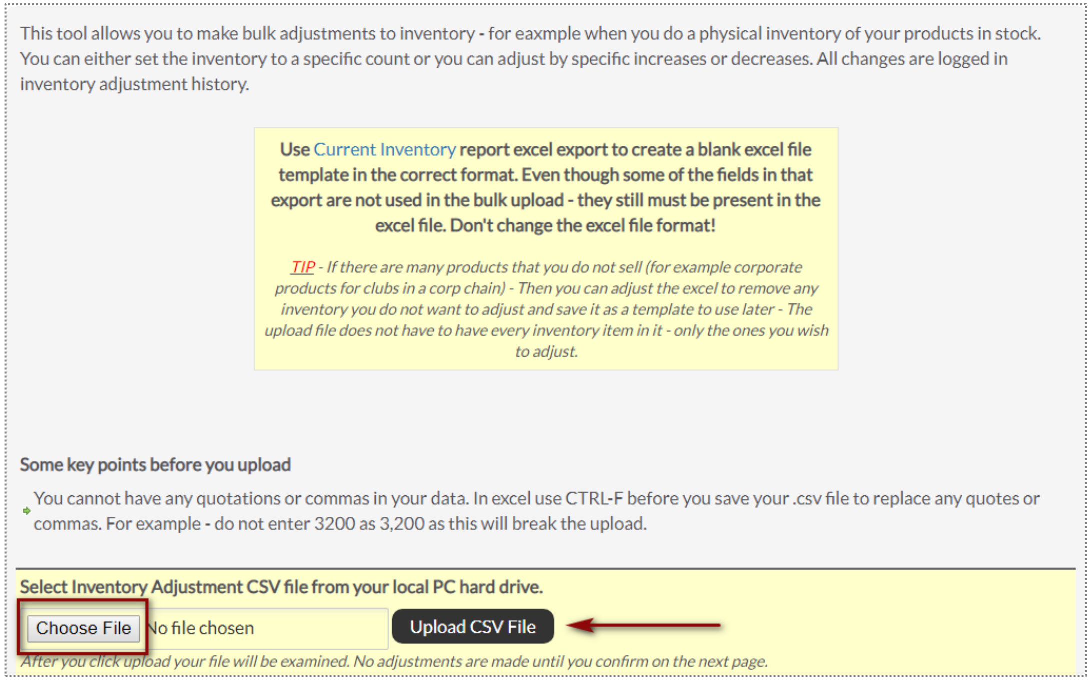
	A	B	C	D	E	F	G	H	I
1	**CR Membership Training Site - Filtered Product Inventory Listing : 5/24/2016**								
2	***This file can be used for bulk inventory adjustments - format must remain the same. After adding adjustment entries in green columns save as .csv file***								
3	**ProductID**	**ProductCode**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

Open up the Excel file once it has been downloaded. Do not alter any columns or rows. The formatting must remain the same for the upload to work properly.
The Excel file will contain **Product Name, Current Inventory** and the following green columns you will need to adjust inventory:
Set Inventory To, Increase Inventory To or **Decrease Inventory To**.

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

Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory



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

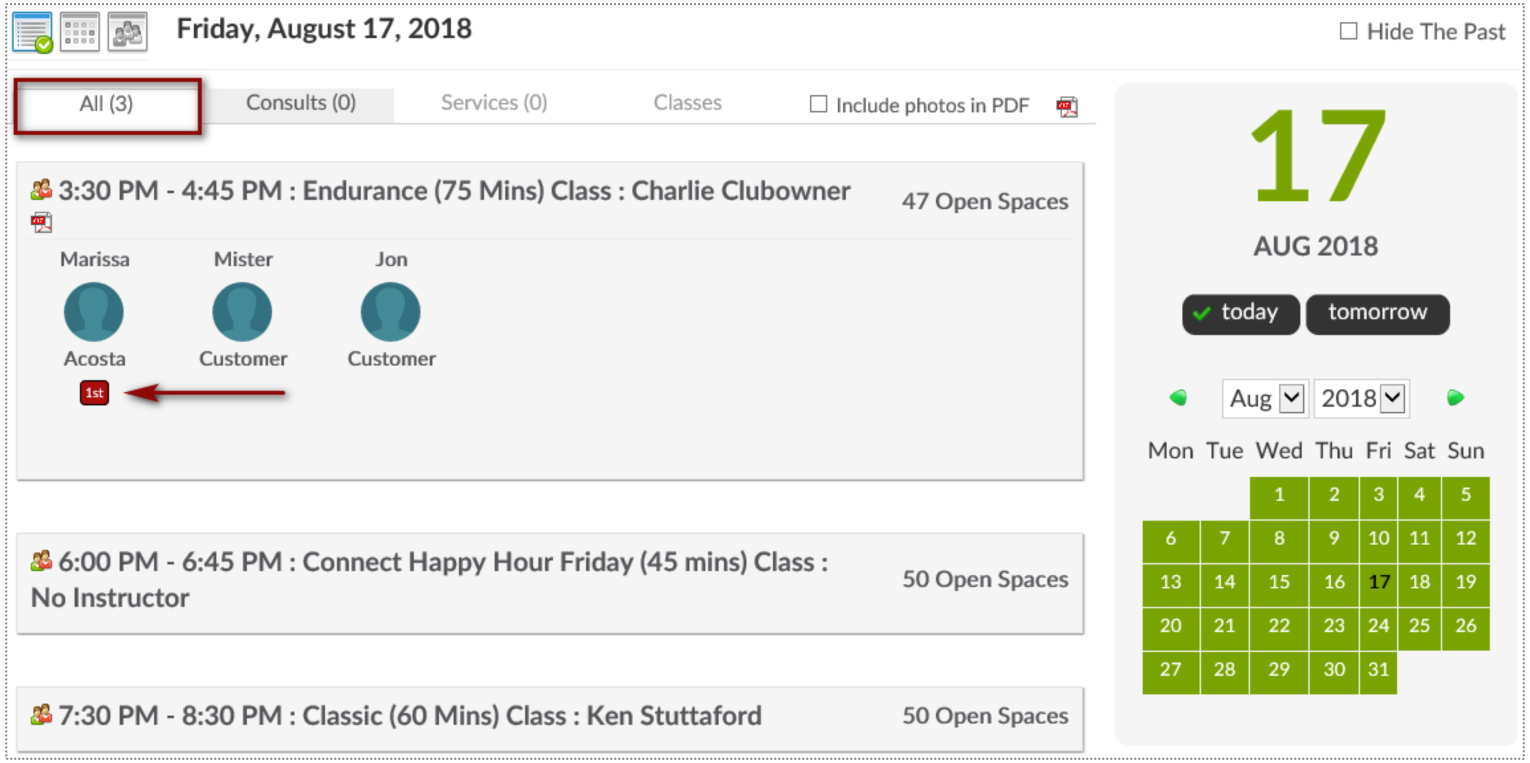
The file will be uploaded and inspected. If it is in the correct format and ready to be processed you can click on **Do Bulk Adjustment.**

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

Schedule Management

Day List

Bookings > Day List > All

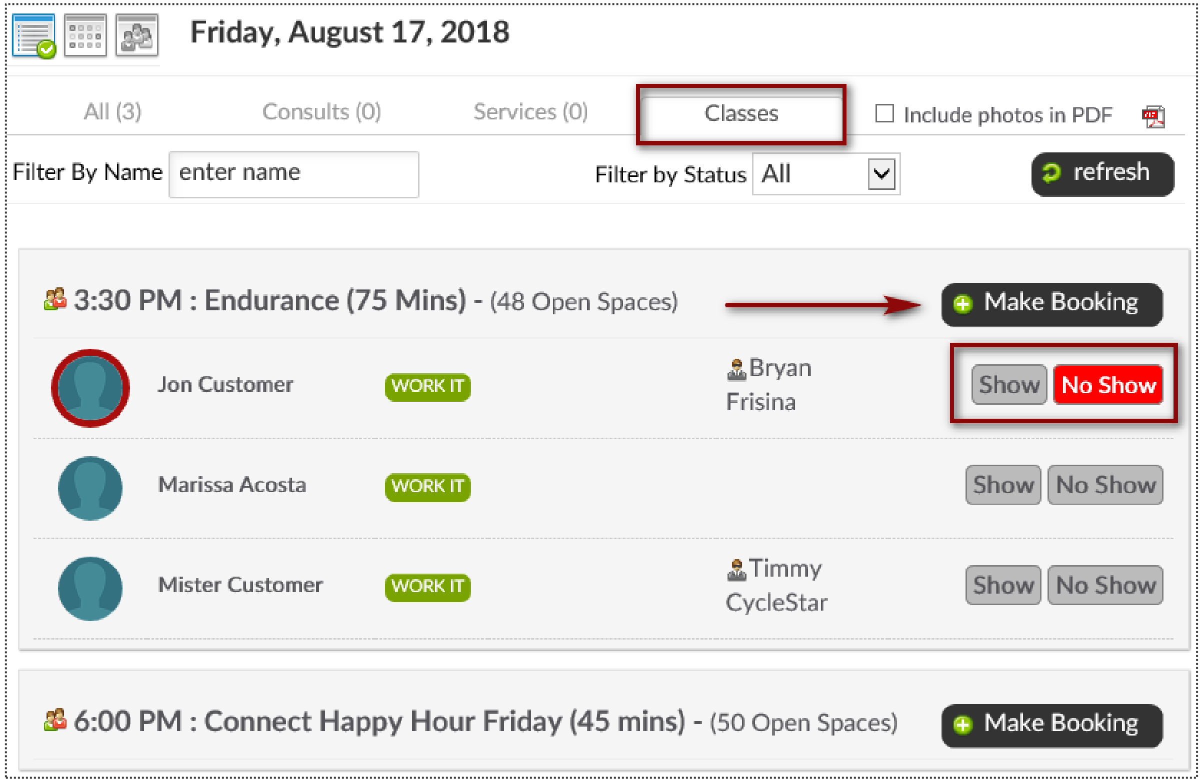


From here you are able to view all scheduled bookings for the day. To change the date you are viewing, use the calendar option on the right side of the screen.

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

Day List

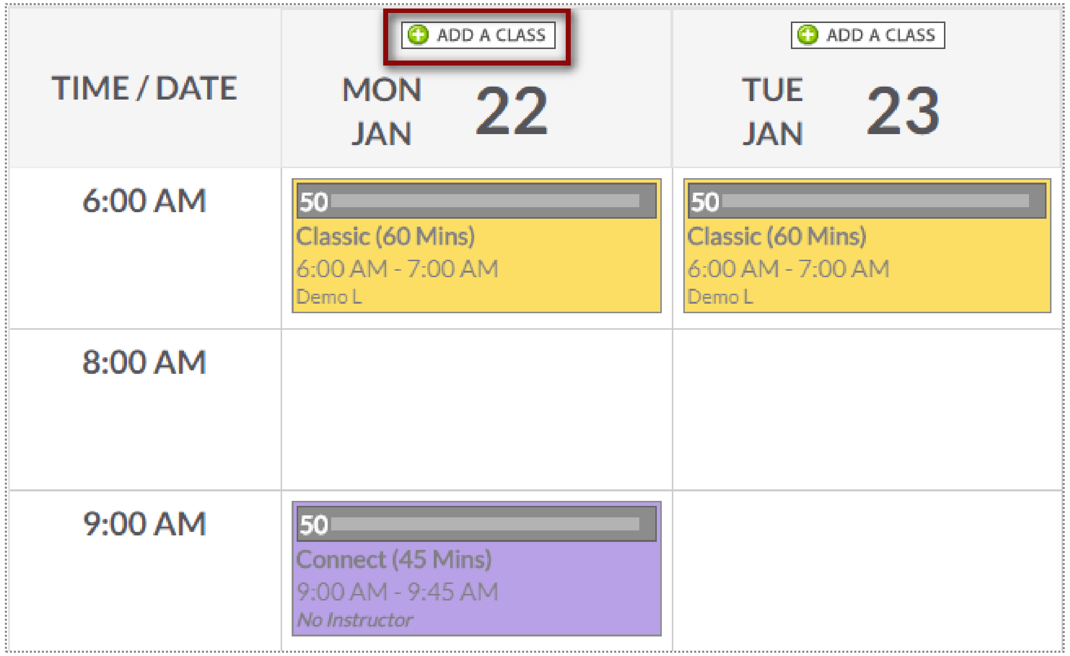
Bookings > Day List > Classes

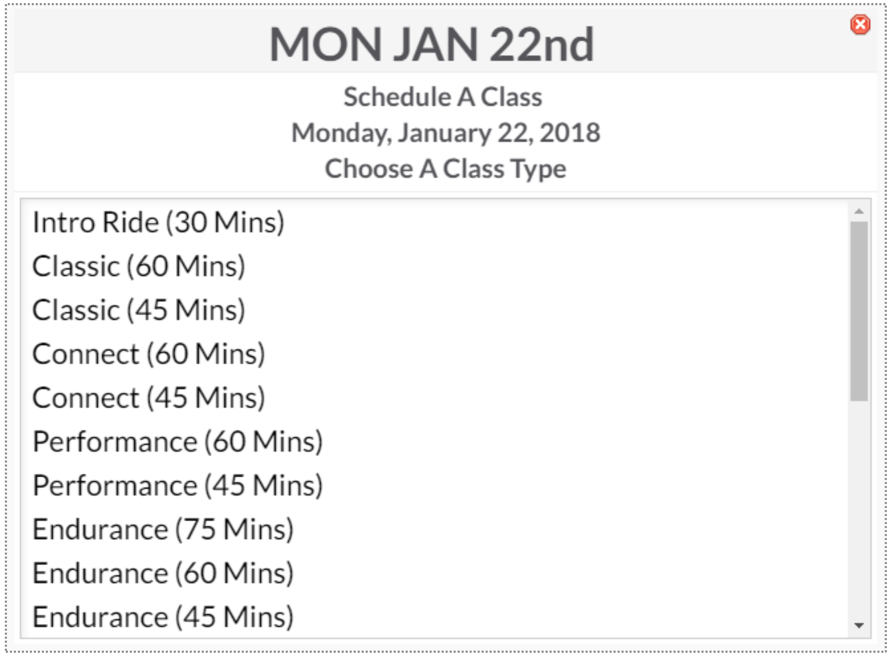


From the **Day List > Classes** tab you are able to book a client into a class click on the **Make Booking** button next to the class the client wishes to attend. The number of spaces available is provided next to each class name.

Classes: Add a Class to the Schedule

Bookings > Classes





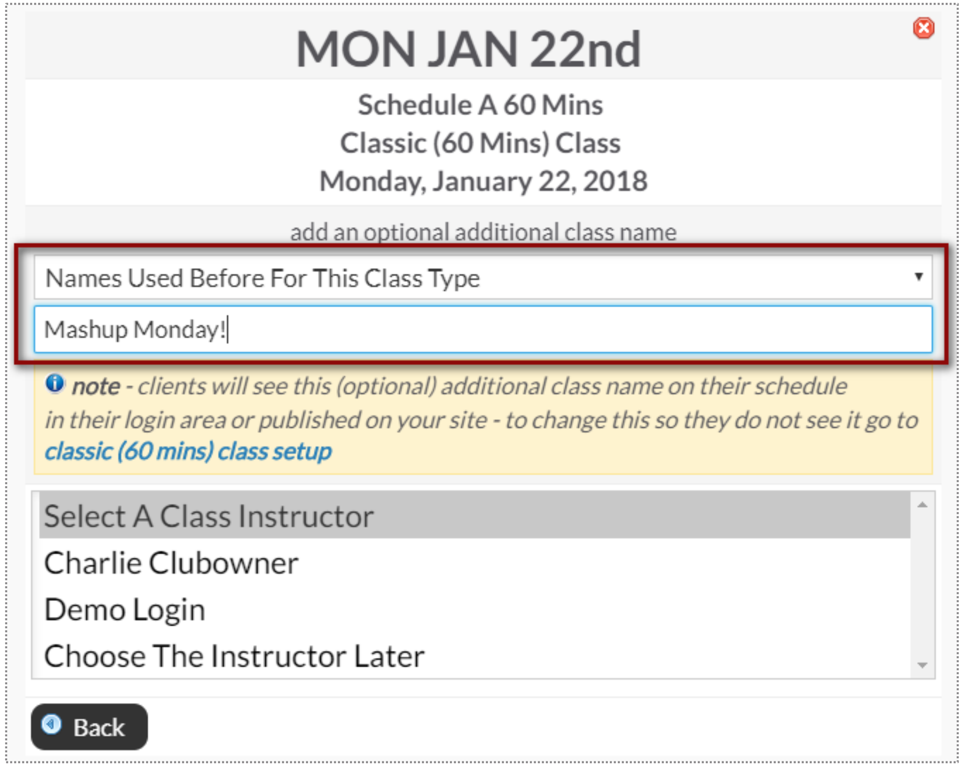
Locate and select the day you want to add the class on the schedule. Click **ADD A CLASS.**

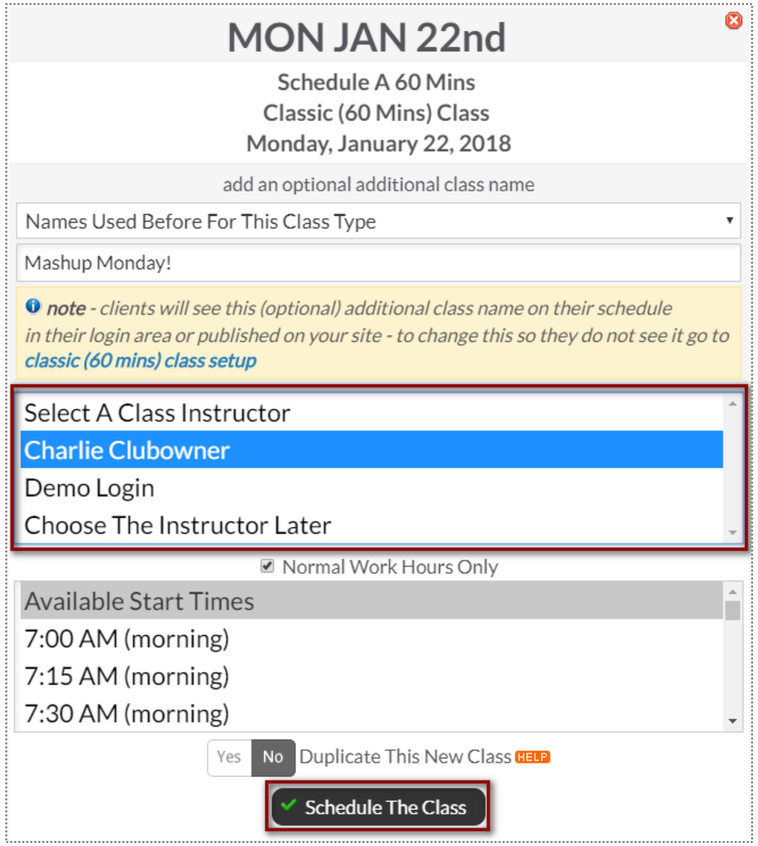
Now **Choose A Class Type** for the date selected.

CLUB PILATES

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.

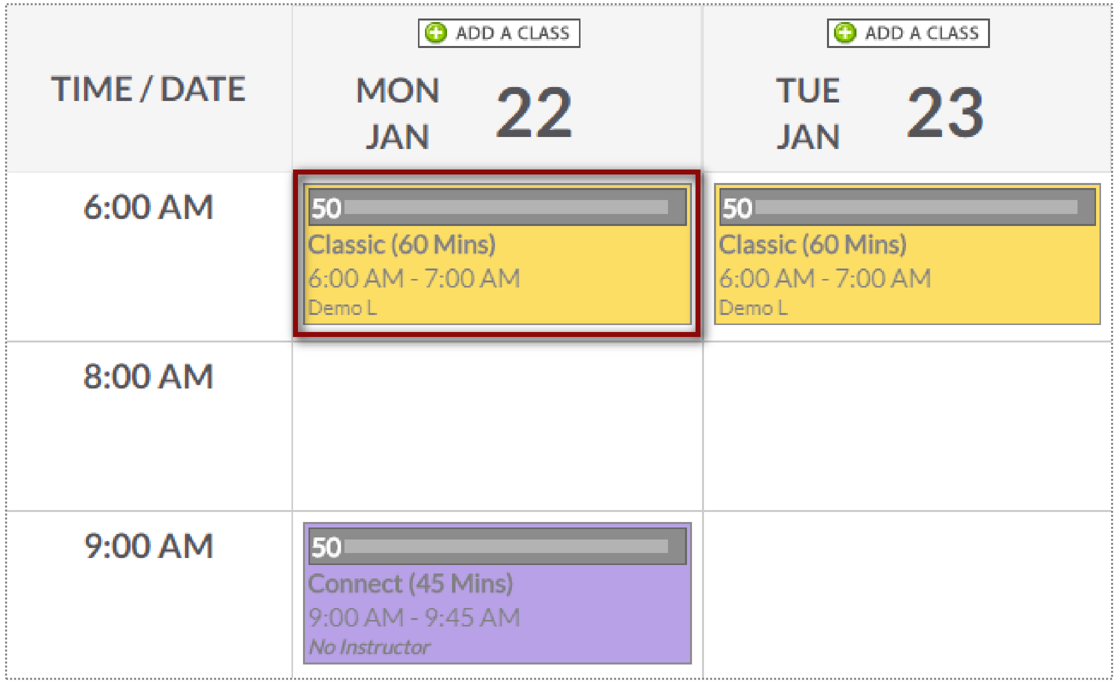
Assign instructor to the class.

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

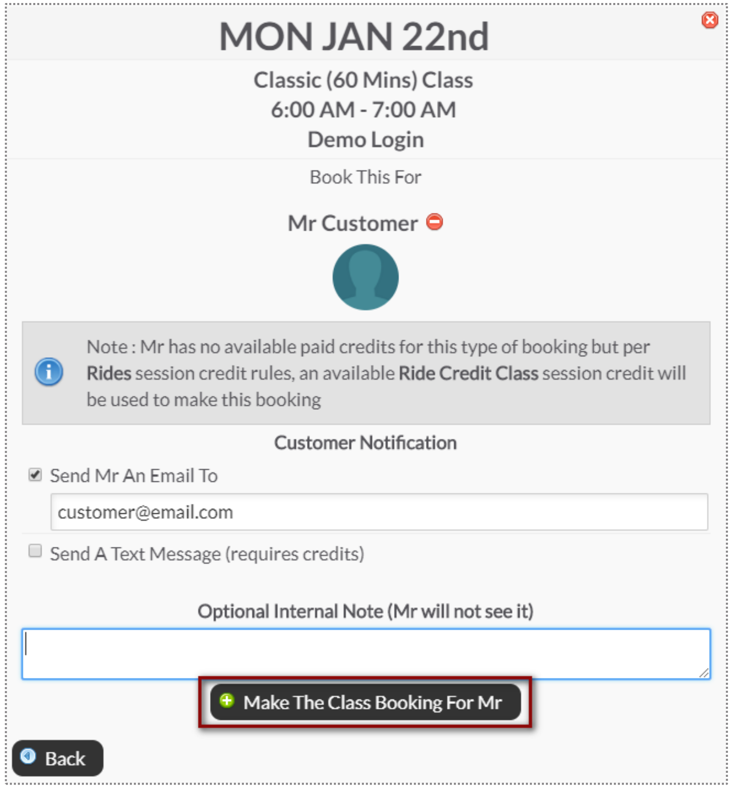
CLUB PILATES

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**.

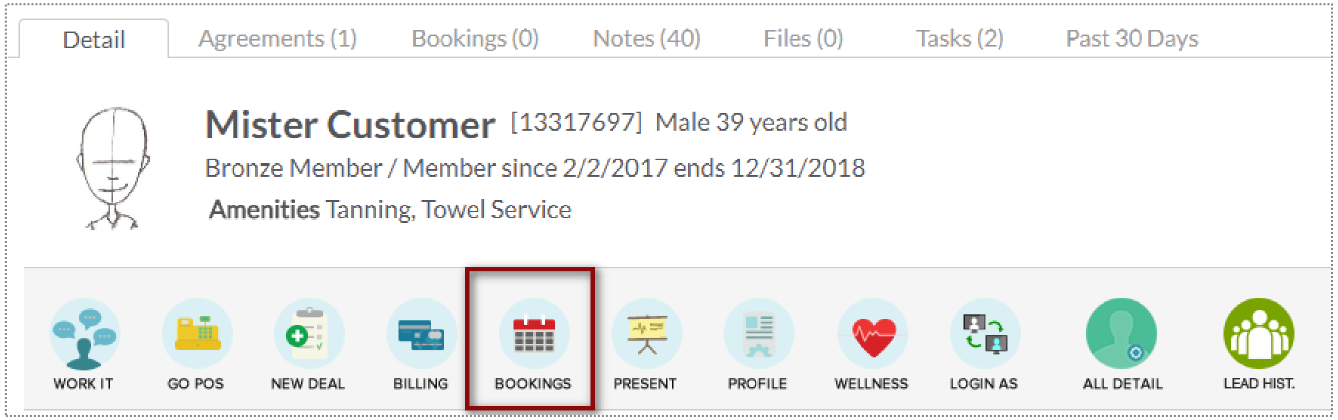


Use the search box to locate your client. **Send An Email To or Send A Text Message** to notify your client of their booking.
Select **Make The Class The Booking** to complete.

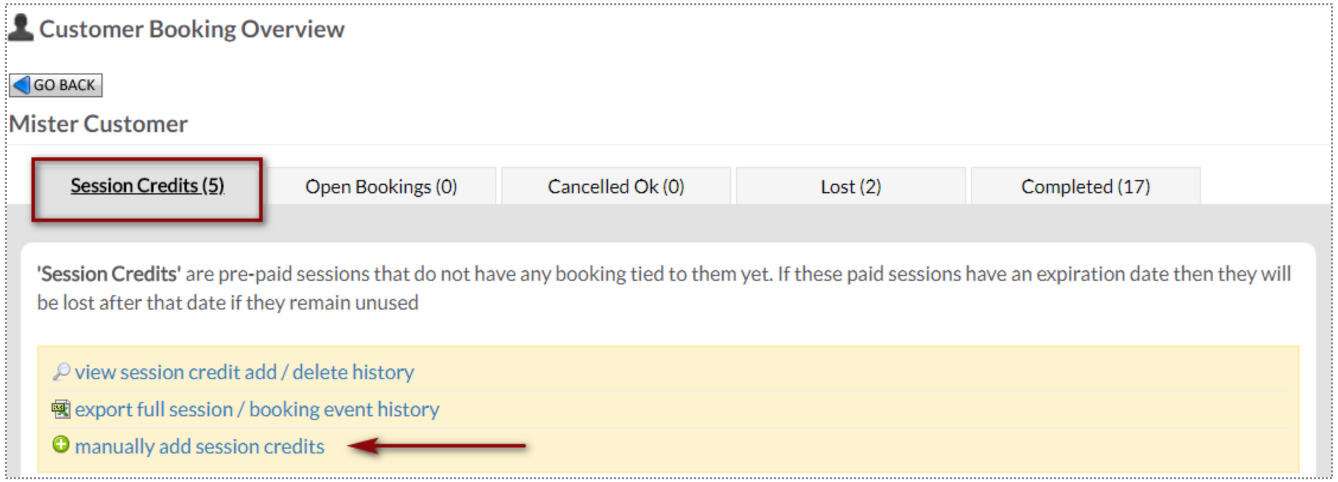
<u>**Note**</u>: Only staff with adequate permissions may book a member into a service without credits.

Classes: Adding Credits to Account

Member Account > Bookings



To access this screen search and select the desired client.

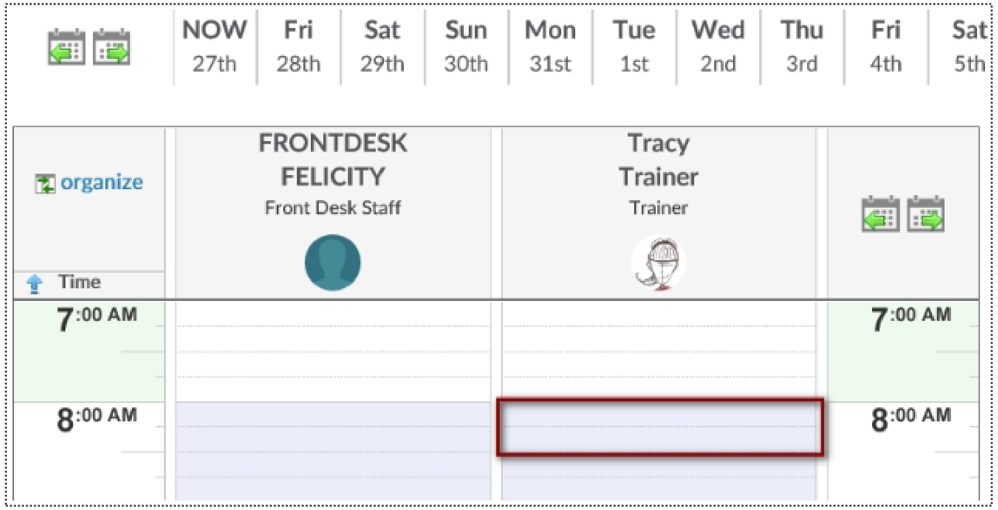


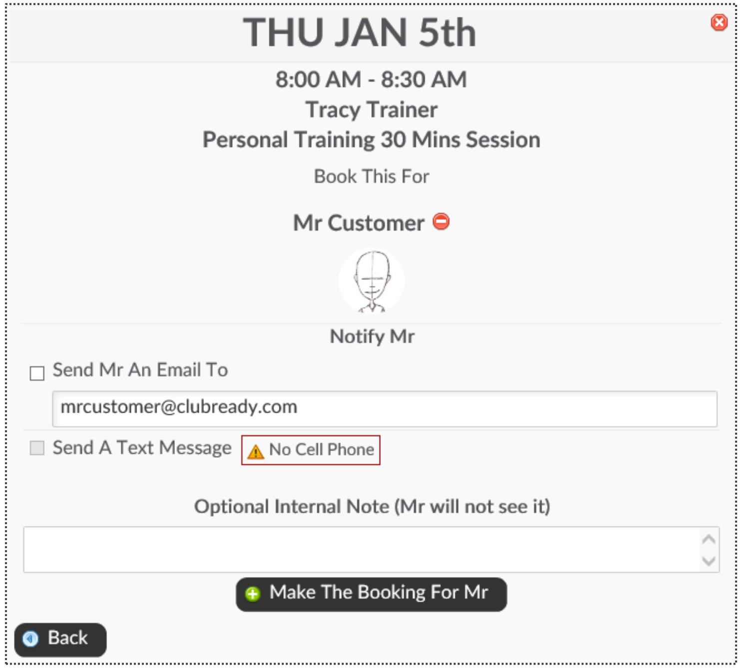
To start manually adding sessions click **manually add session credits.** Choose the **quantity, session credit type** and **session expiration date.**

CLUB PILATES

Grid View: Schedule a Service

Bookings > Grid View





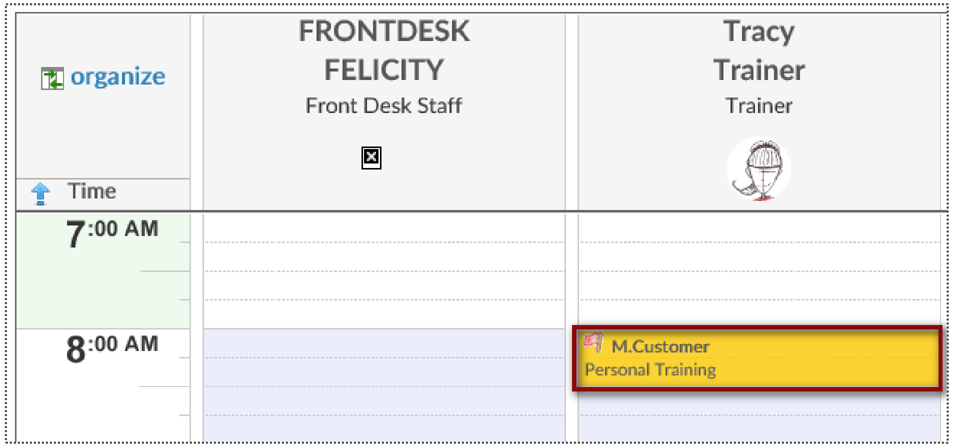
1-on-1 services are scheduled via the Grid View. Select the date and click on the beginning time block under the provider performing the service.

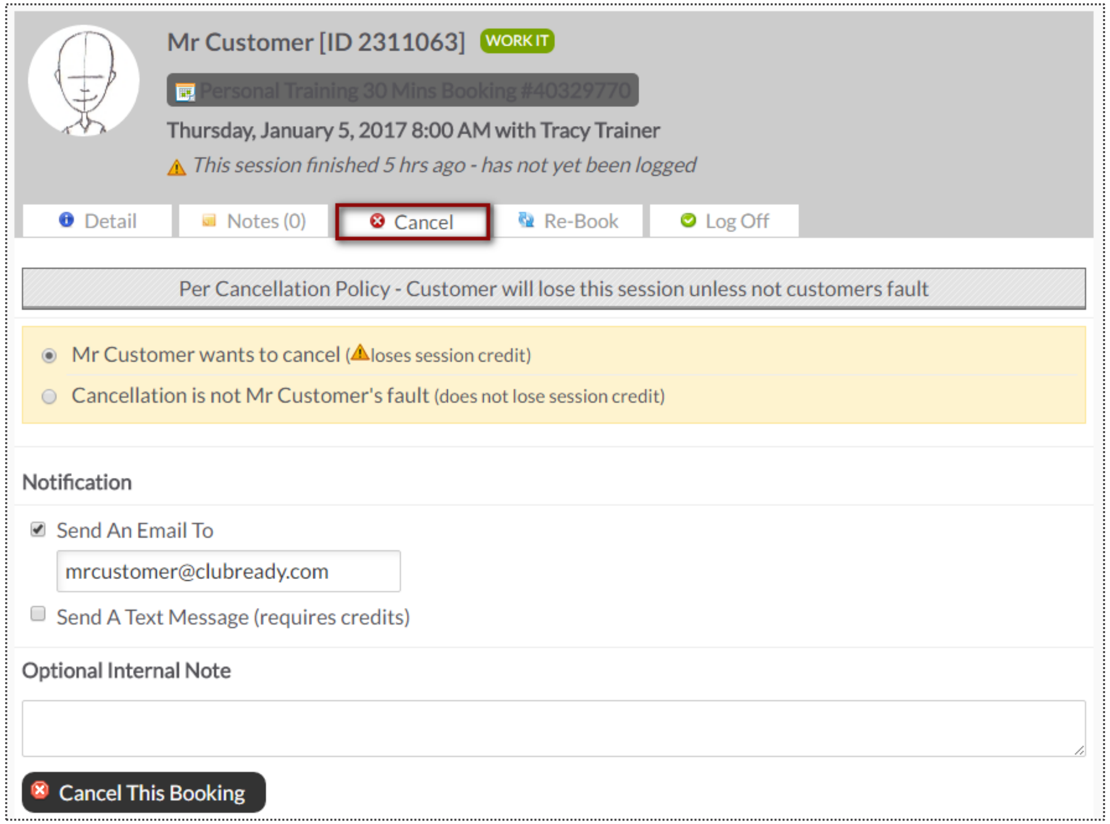
Click the **Add New Booking** button. Select the desired service and use the search box to search for your client.
Send An Email To or Send A Text Message to notify your client of their booking.
Select **Make The Booking** to complete.

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

Grid View: Cancel a Booking

Bookings > Grid View



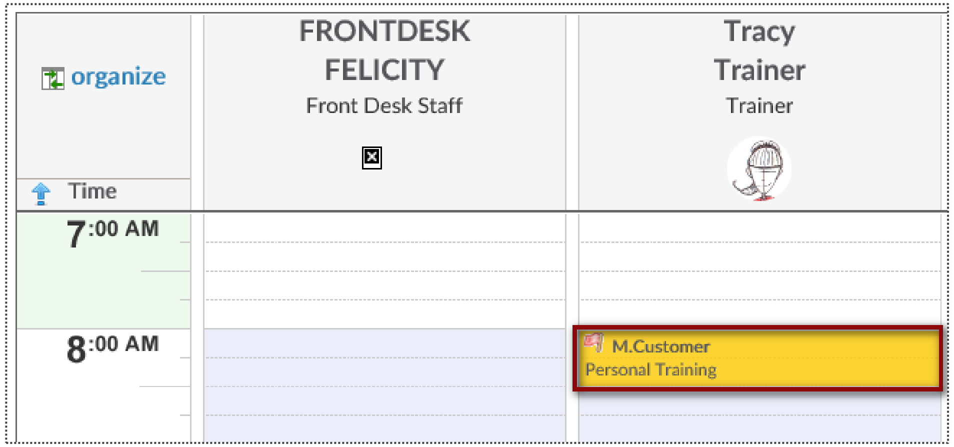


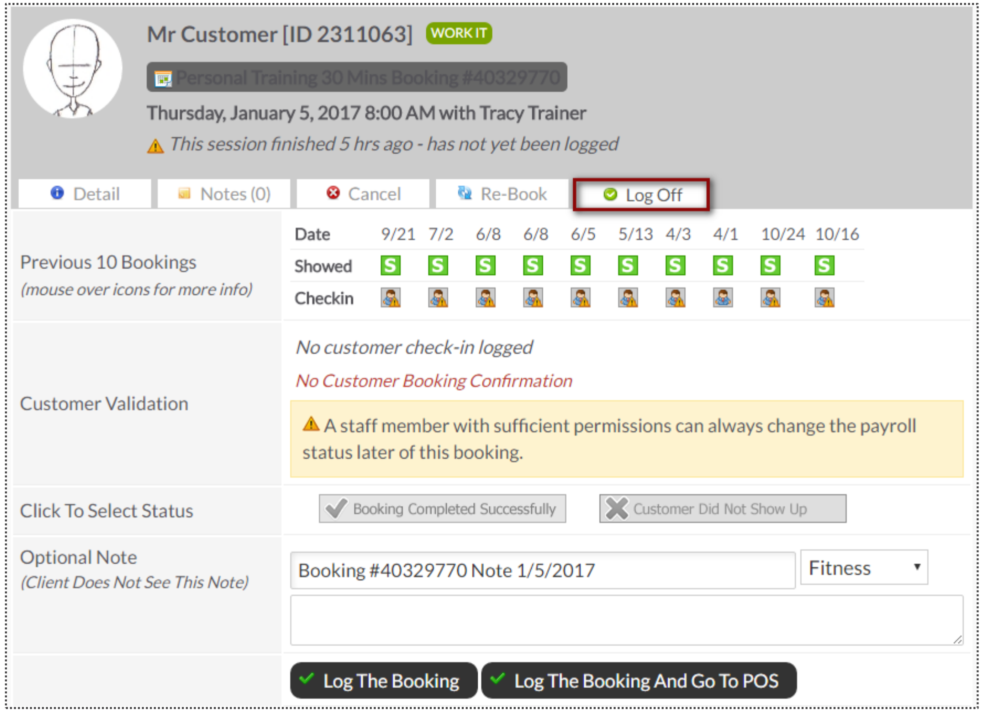
Select the session you wish to cancel and a window will open with management options.

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





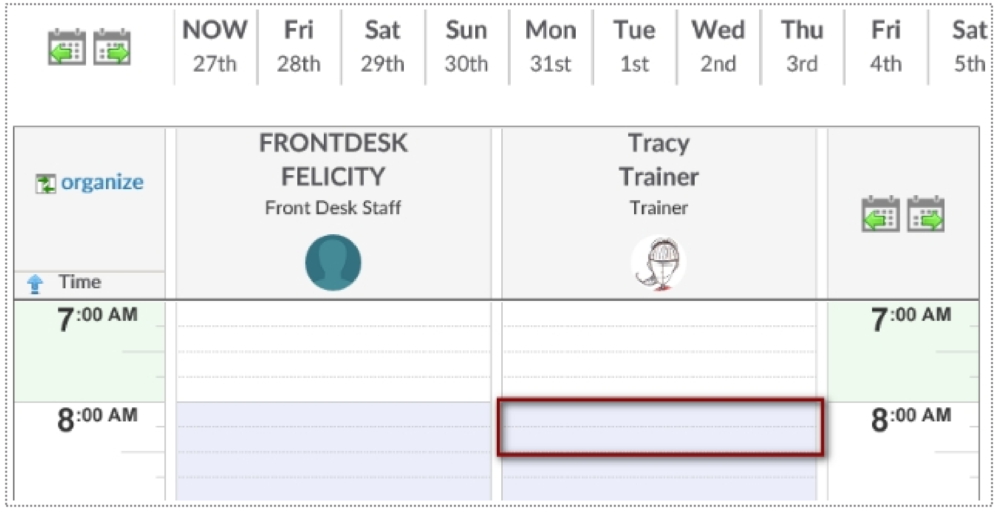
Select the session you wish to log off and a window will open with management options.

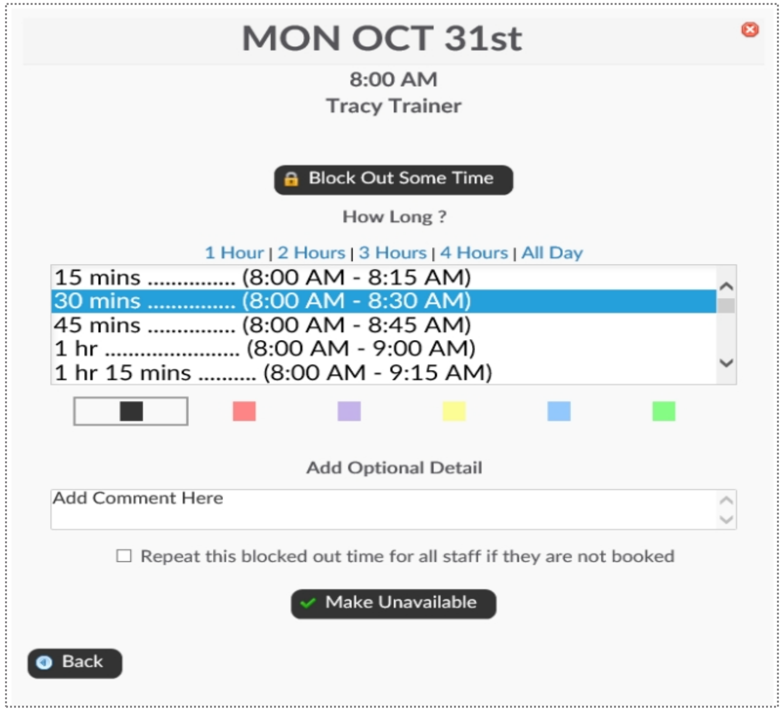
To log a booking click the **Log Off** tab.
Select whether to log the session as successfully completed or as a no show. Click **Log This Booking** to complete the process.

CLUB PILATES

Block Time as Unavailable

Bookings > Grid view



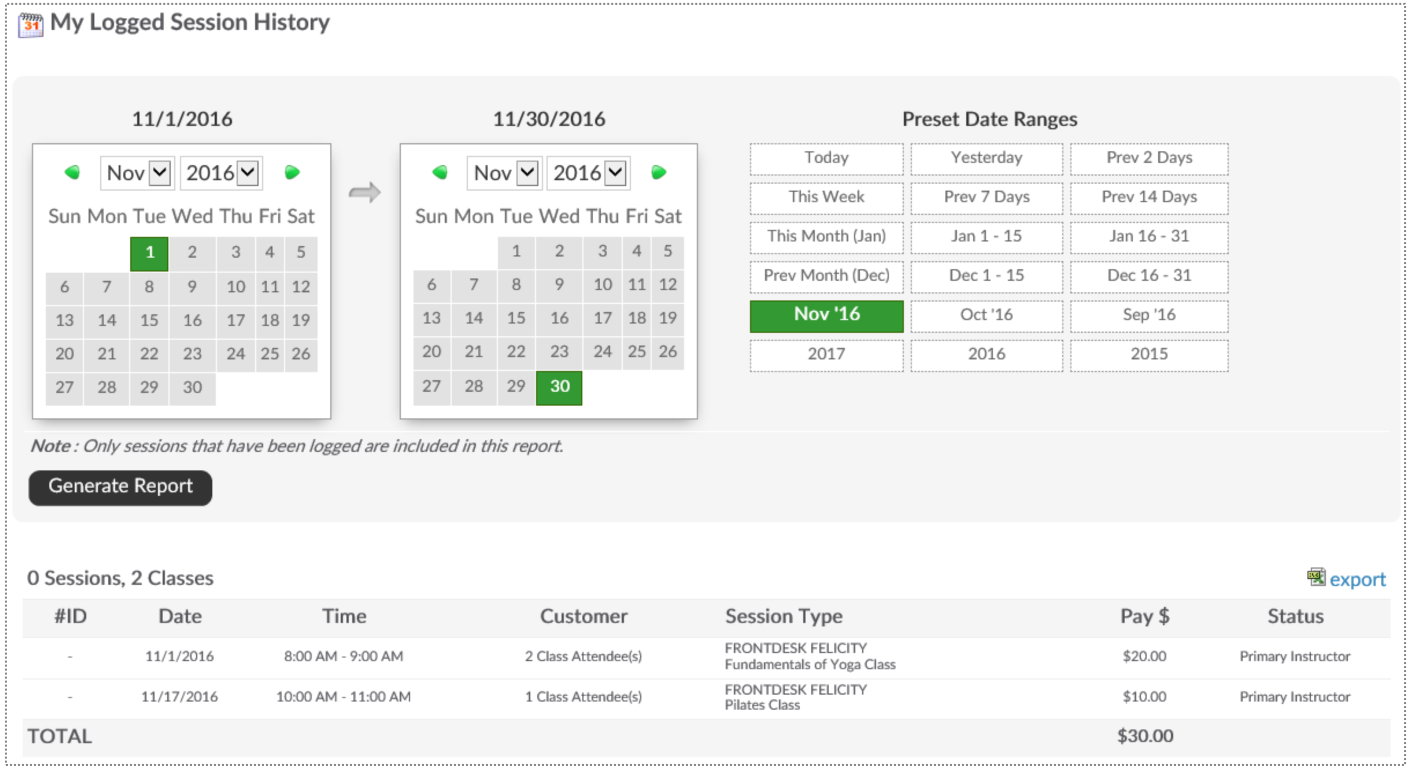


Locate the day and time you wish to mark as unavailable and click on the calendar to open your options.

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

My Session History

Bookings > My Session History

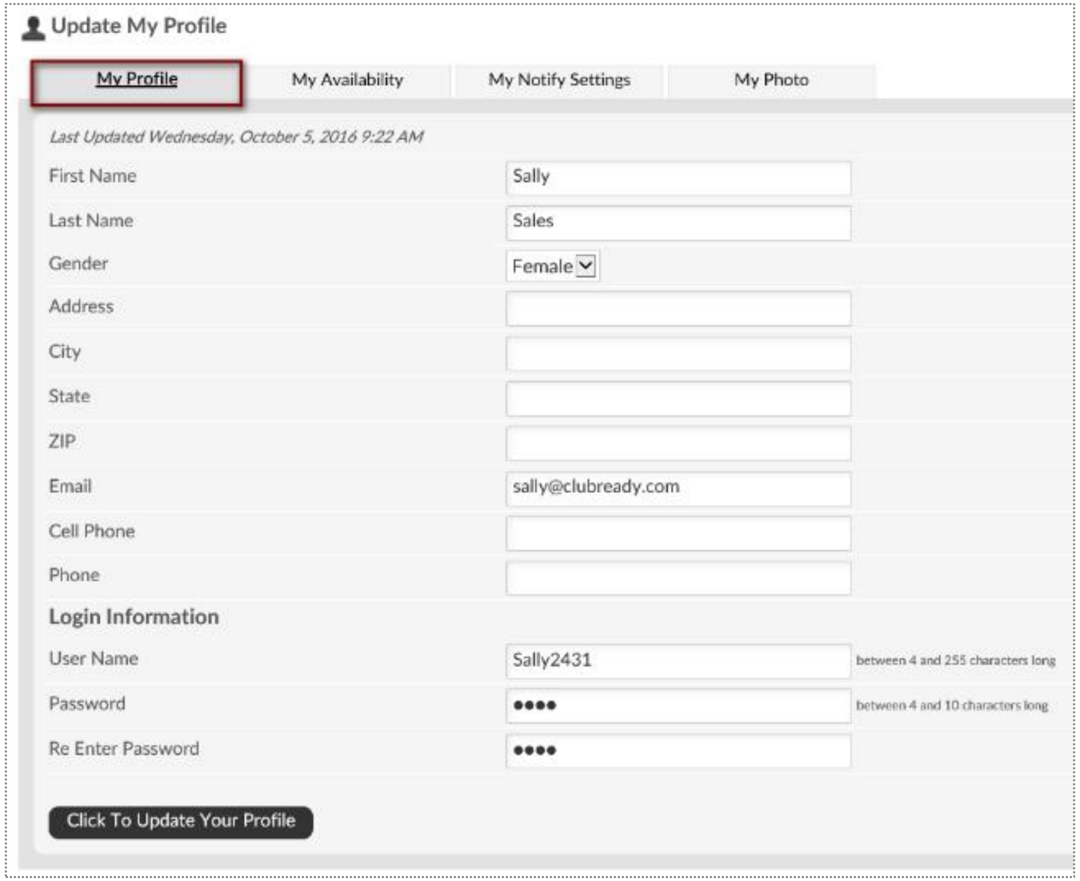


Select the dates you wish to generate the report for by clicking on the to and from calendar or choosing a Preset Date Range. Click **Generate Report**. Your results will show on the webpage and includes the booking ID, date and time of the booking, customer name, type of session, your pay for the booking,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

Staff Management

Your Login: Profile

Updating your profile and availability

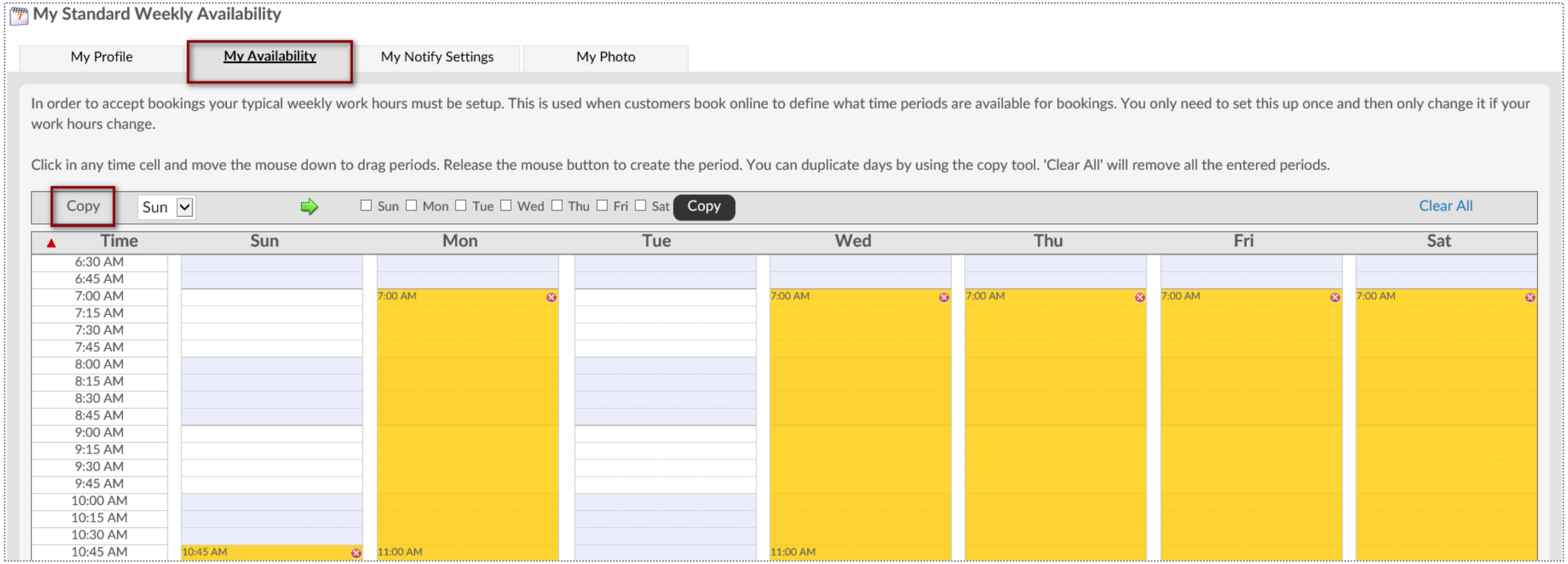


Select the **My Profile** tab. Update your information. Entering your email is important for notifications from ClubReady.
The log in section will allow you to change your username (if what you want is not already taken) and password. Click update to save your changes.

CLUB PILATES

Your Login: Availability

Updating your profile and availability

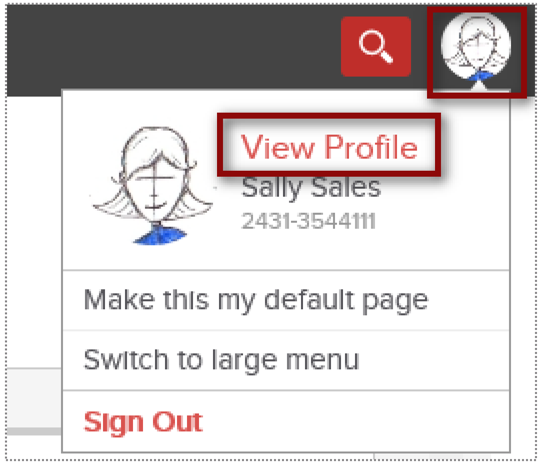


Select **My Availability** tab. To select a time period as available click on the day and starting time that you are available. You will want to hold down the left mouse button as you drag to highlight the desired length time.
Copy - You can copy the available time from one day to another using this tool.
Select Location - if you have access to more than one location, you will be able to set your availability at each location using this drop-down.
Clear All - will remove all available times.

CLUB PILATES

Your Login

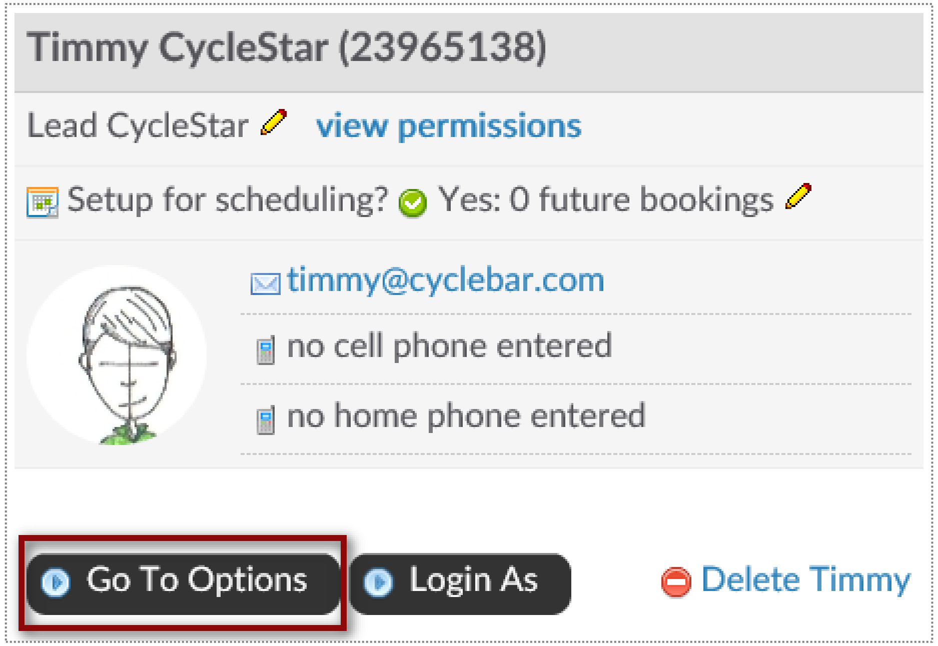
Updating your profile and availability

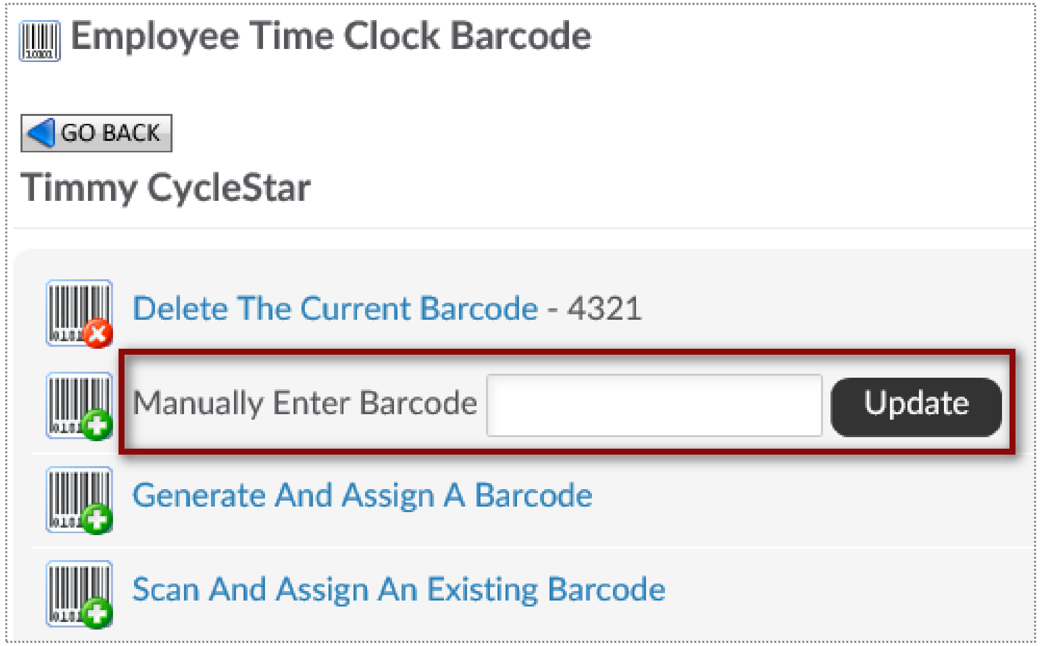


Log into your site. In the top-right corner click on your picture icon. Select option **View Profile.**

Setup Staff Clock In/Out Barcode

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

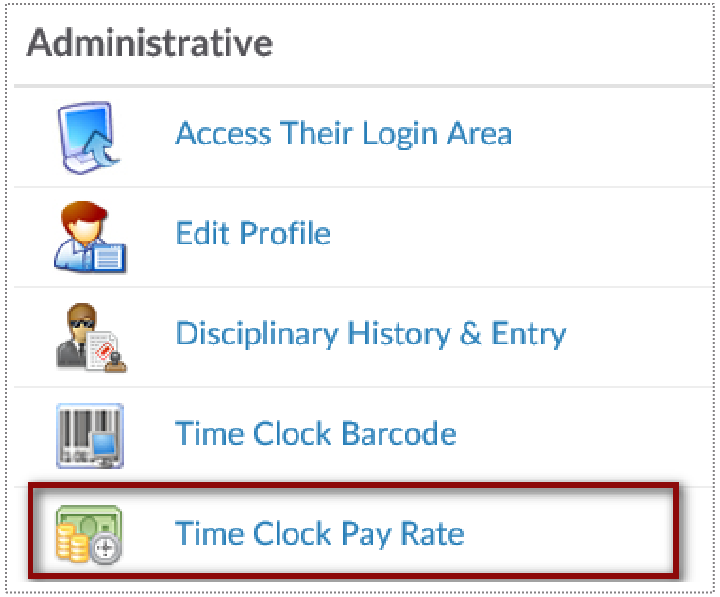




Employee must be assigned a barcode to keep track of their clocked hours. You can choose to **Manually Enter Barcode** for the staff. Any alpha numeric code that is more than 2 characters.

Setup Staff Hourly Pay Rate

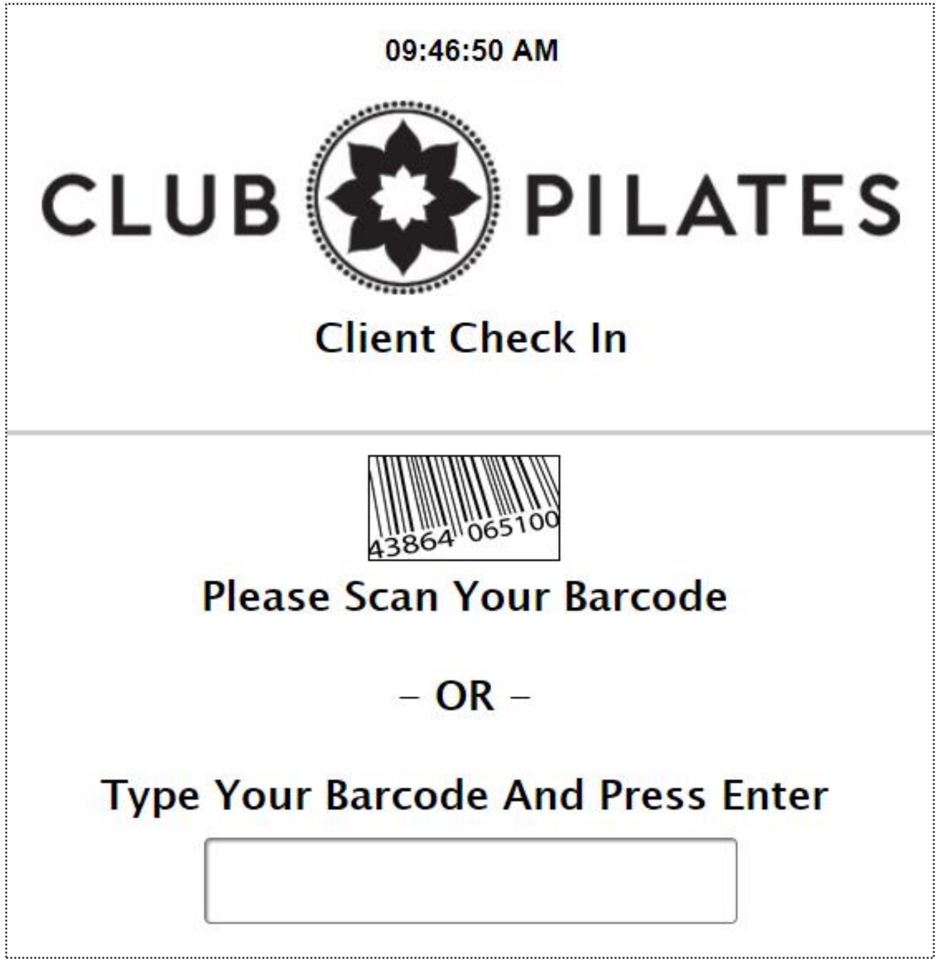
Staff > locate staff member > Go To Options > Time Clock Pay Rate



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

Check In Web Kiosk

Setup > General > Check In Web Kiosk



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

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

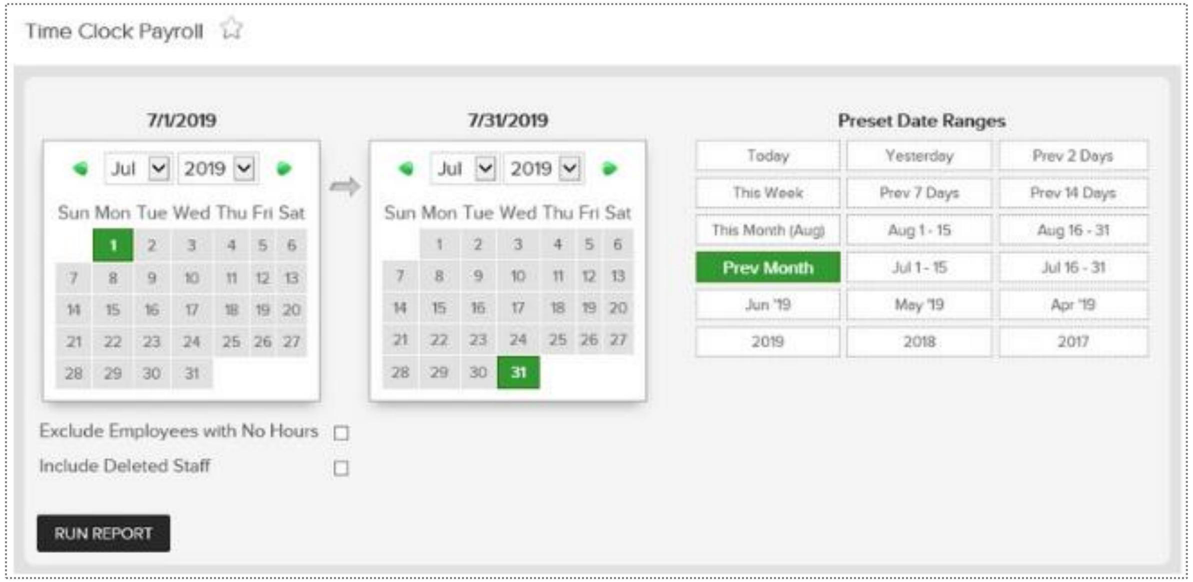
*The Check In Web Kiosk will be used for staff to document their worked hours.

Staff Time Clock

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

Time Clock Report

Reports > Staff > Time Clock Payroll



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

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

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

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

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

CLUB PILATES

ClubReady

Reports

Key Reports

Learn > Knowledge

Complete Guide To Intelligence & Sales Reports:

https://www.clubready.com/wiki/WK30115783534

Complete Guide To Credits / Bookings Reports:

https://www.clubready.com/wiki/WK30675265741

Complete Guide To Member Reports:

https://www.clubready.com/wiki/WK31187557746

Complete Guide To Staff Reports:

https://www.clubready.com/wiki/WK31164984962

Key Reports

Learn > Knowledge

Complete Guide To Product Reports:

https://www.clubready.com/wiki/WK31171452560

Complete Guide To Communication Reports:

https://www.clubready.com/wiki/WK3123932467

Complete Guide To Misc. Reports:

https://www.clubready.com/wiki/WK31244534454

Training & Support

Training: ClubReady Foundations Webinar

Learn > Training

Monday, October 12, 2020

10:00 AM EST

All Club Staff

ClubReady Foundations for Staff Members (90 mins) view details

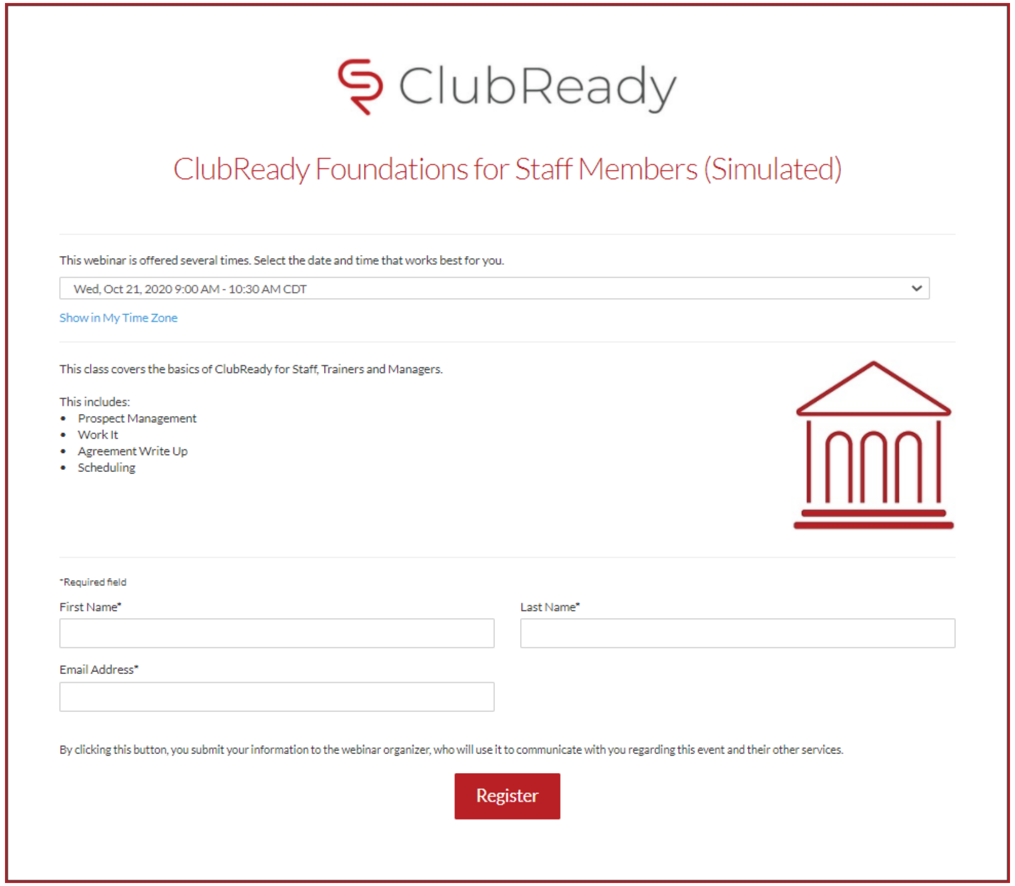
For the first 60 min, this class covers the basics of ClubReady for Staff, Trainers and Manager. Afterwards, an open Q&A regarding any questions pertaining to the webinar.

webinar URL	https://attendee.gotowebinar.com/rt/4935457410939114754
Key Learning 1	Basics

CLUB PILATES

Training: ClubReady Foundations Webinar

Learn > Training



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

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

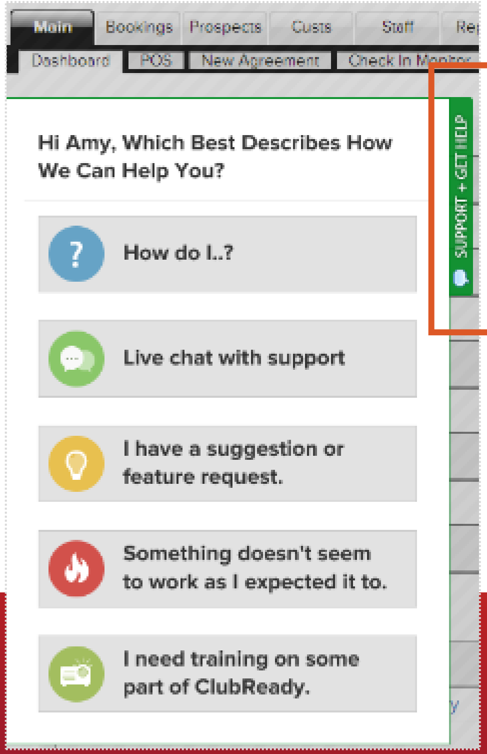
Video - Employee Time Clock:
https://www.clubready.com/wiki/WK31458733558

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

CLUB PILATES

Support + Get Help

Got a problem or need help? Please open a support request by using the green **"SUPPORT + GET HELP"** tab on the left-hand side of your screen or send an email to support@clubready.com



Live chat shows as an option in the support slide out and allows you to chat directly with the support team. Chats can also be converted into help desk support tickets if a resolution is not available during the chat session.

You can also reach our support team at 1-800-405-4818

MON – FRI: 6AM – 9PM CST | SAT – SUN: 8AM – 5PM CST

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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