



ClubReady Foundations for Club Pilates

User Guide



Table of Content

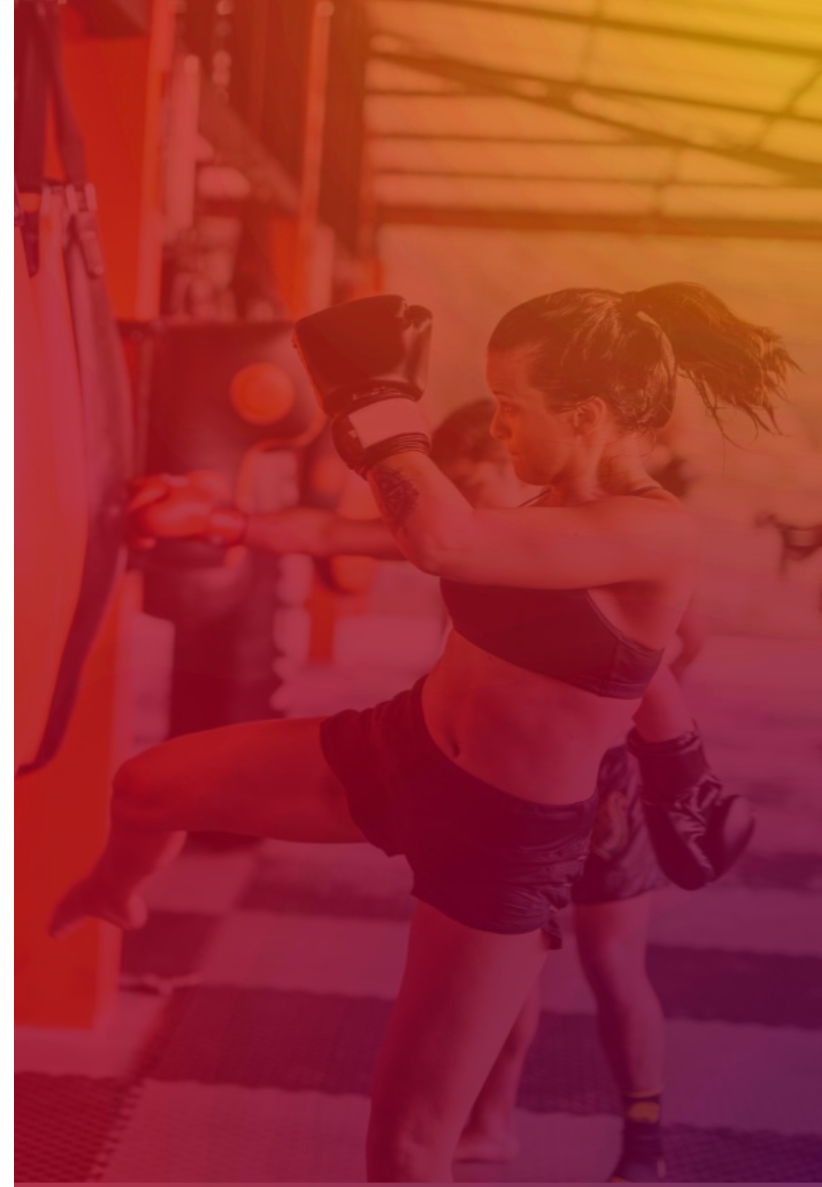
- Menu and Navigation
- Waivers
- Lead Management Dashboard
- Prospect Management / Tasks
- Communications
- Agreement Write Up
- Member Management
- POS & Inventory
- Schedule Management
- Staff Management
- Reports
- Training & Support

ClubReady Demo Site

<http://www.cpdemo.clubready.com>

Username: cpmanager

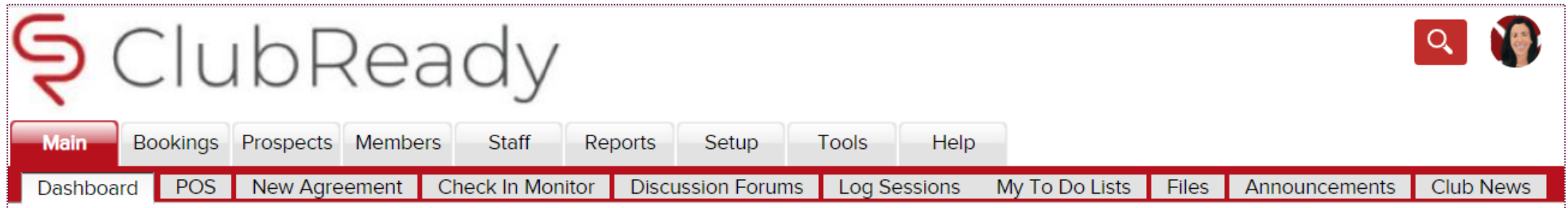
Password: password





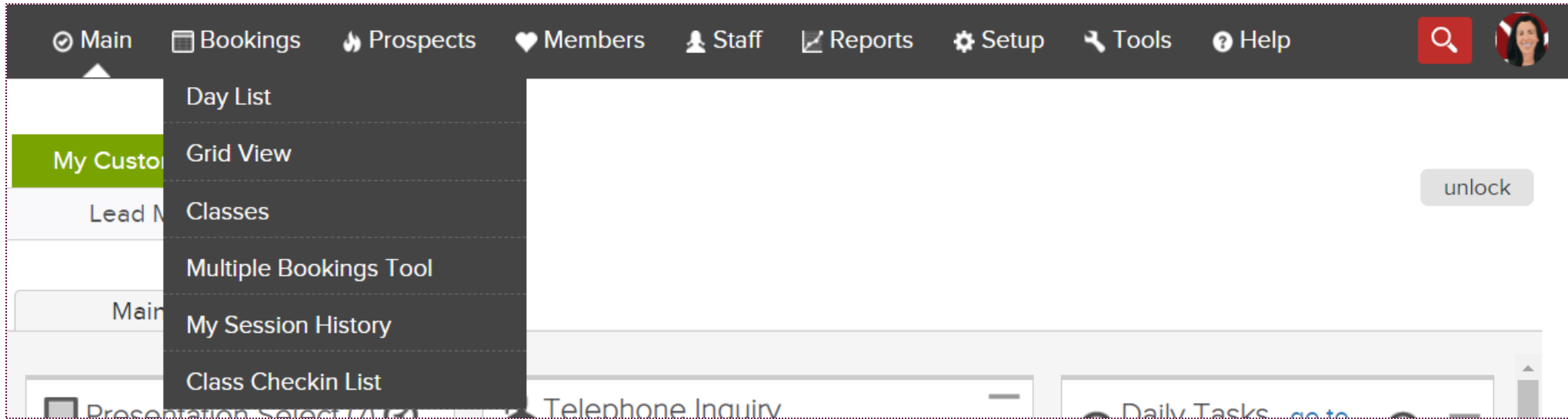
Menu & Navigation

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

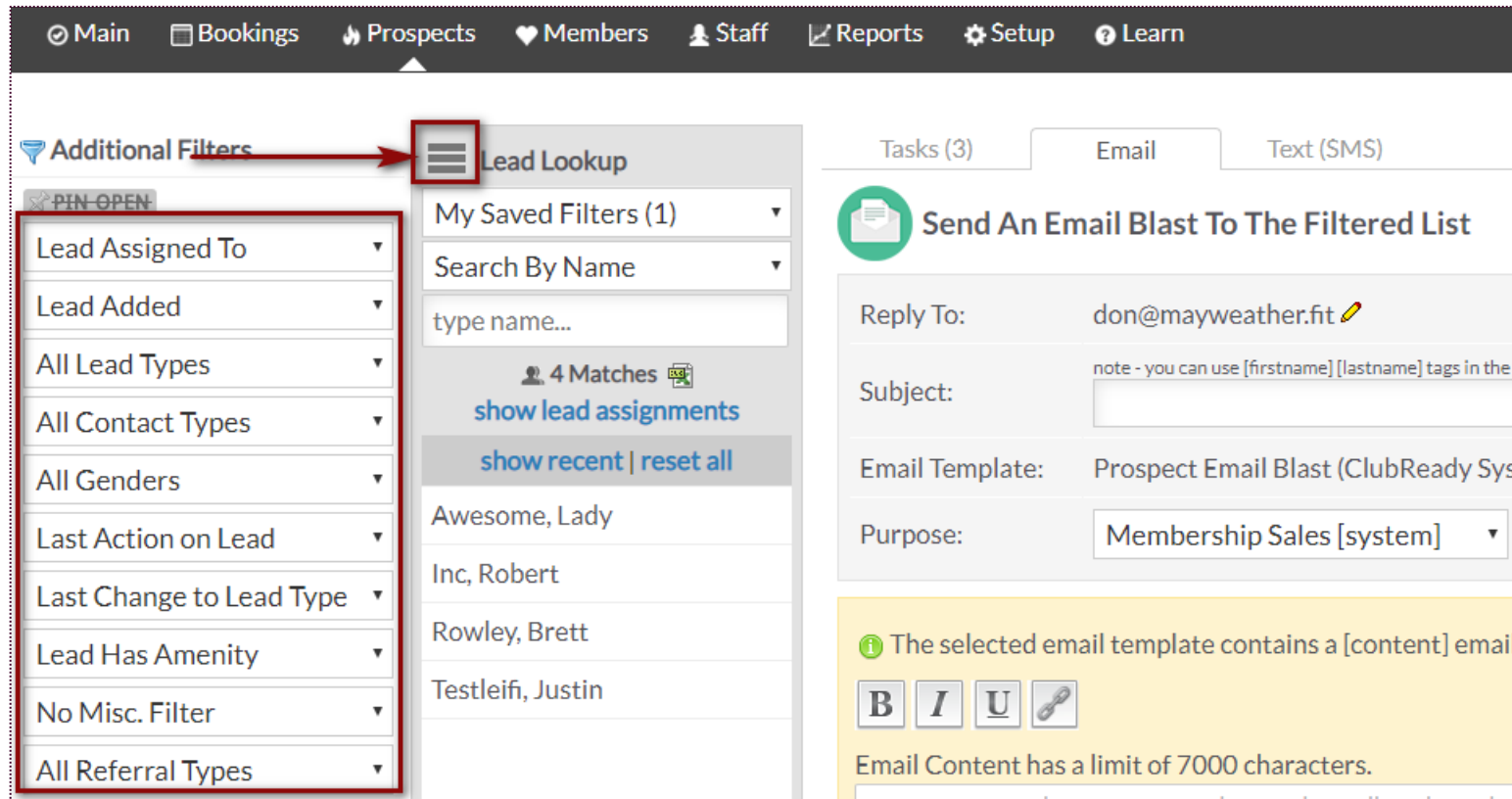


This menu style takes up less space but has no club logo. This menu style offers the same menu options, with a drop down menu's as a single menu strip along the top of the page.

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

Lookup Prospect

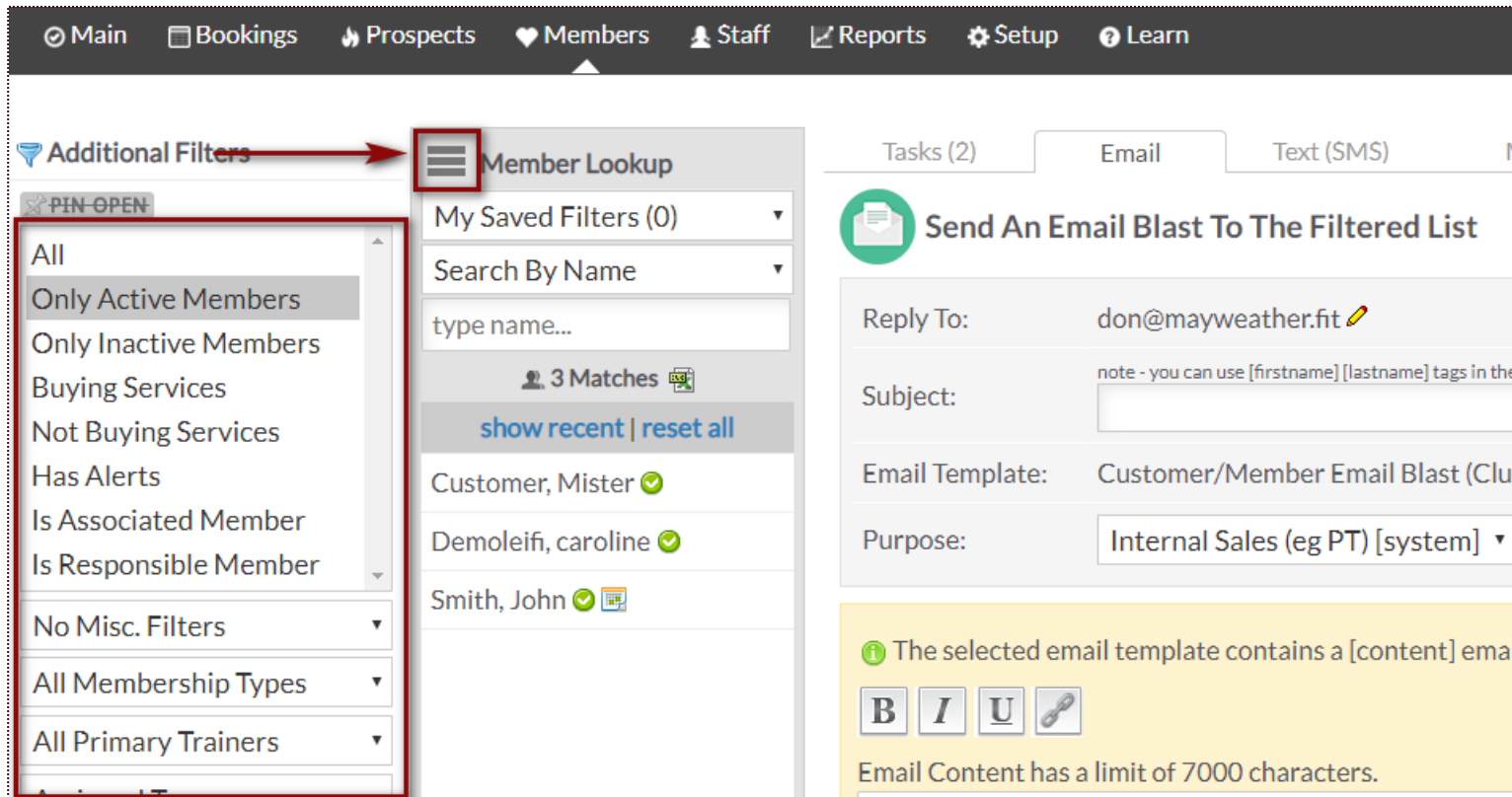
Prospects > Membership Prospects



The screenshot displays the Club Pilates software interface. At the top, a navigation bar includes links for Main, Bookings, Prospects, Members, Staff, Reports, Setup, and Learn. The 'Prospects' section is active, showing a sidebar with 'Additional Filters' and a 'Lead Lookup' panel. The 'Lead Lookup' panel is highlighted with a red box and contains a search bar, a list of filters (e.g., Lead Assigned To, Lead Added, All Lead Types), and a list of 4 matches: 'Awesome, Lady', 'Inc, Robert', 'Rowley, Brett', and 'Testleifi, Justin'. To the right, the 'Send An Email Blast To The Filtered List' configuration screen is visible, showing fields for Reply To (don@mayweather.fit), Subject, 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 placeholder and that the email content has a limit of 7000 characters.

Lookup Members

Members > Lookup



Navigation: Main | Bookings | Prospects | Members | Staff | Reports | Setup | Learn

Additional Filters

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

Member Lookup

My Saved Filters (0)

Search By Name

type name...

3 Matches

show recent | reset all

Customer, Mister ✓

Demoleifi, caroline ✓

Smith, John ✓

Tasks (2) | Email | Text (SMS)

Send An Email Blast To The Filtered List

Reply To: don@mayweather.fit

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

Email Template: Customer/Member Email Blast (Club Pilates)

Purpose: Internal Sales (eg PT) [system]

i The selected email template contains a [content] email

B I U

Email Content has a limit of 7000 characters.



Lead Management Dashboard





Lead Management Dashboard - Tasks

Main > Dashboard

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

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.

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

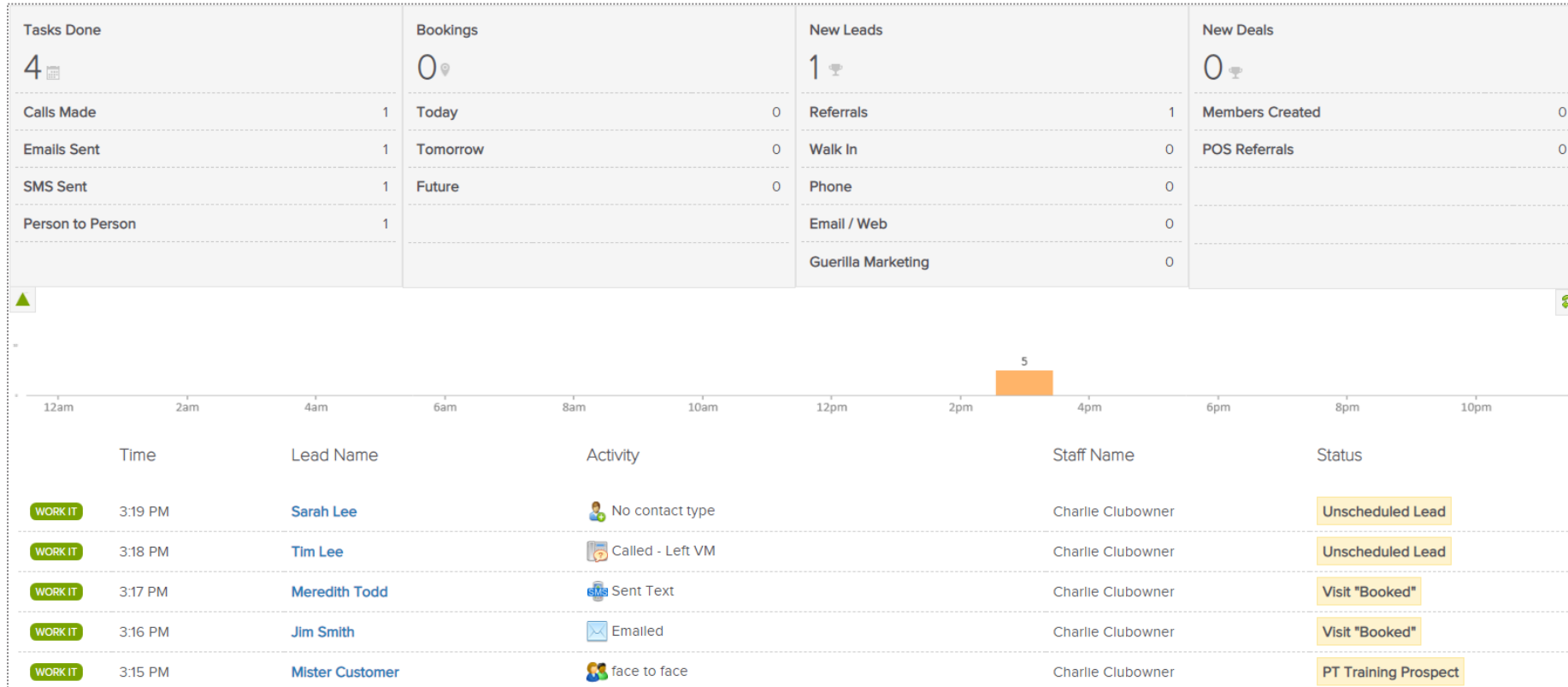
Lead Name	Lead Type	Referral Type	Contact Method	Entry Time	Contacts
WORK IT Jason Smith	Unscheduled Lead	Flyer	Telephone Inquiry	Added 4 days ago	✓ 1 contact
WORK IT Jon Martin	Visit "Booked"	Instagram	Telephone Inquiry	Added last month	✓ 1 contact

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.

Lead Management Dashboard – Activity

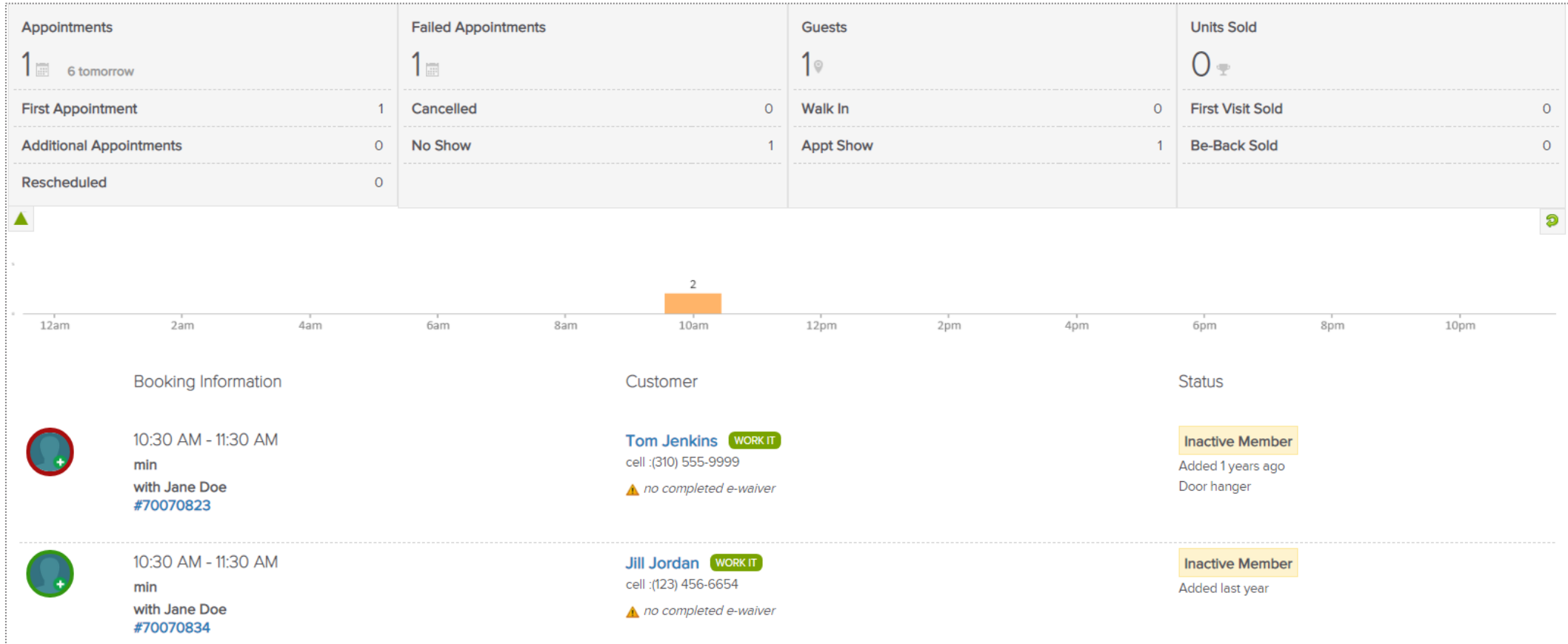
Main > Dashboard



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

Lead Management Dashboard – Guest Log

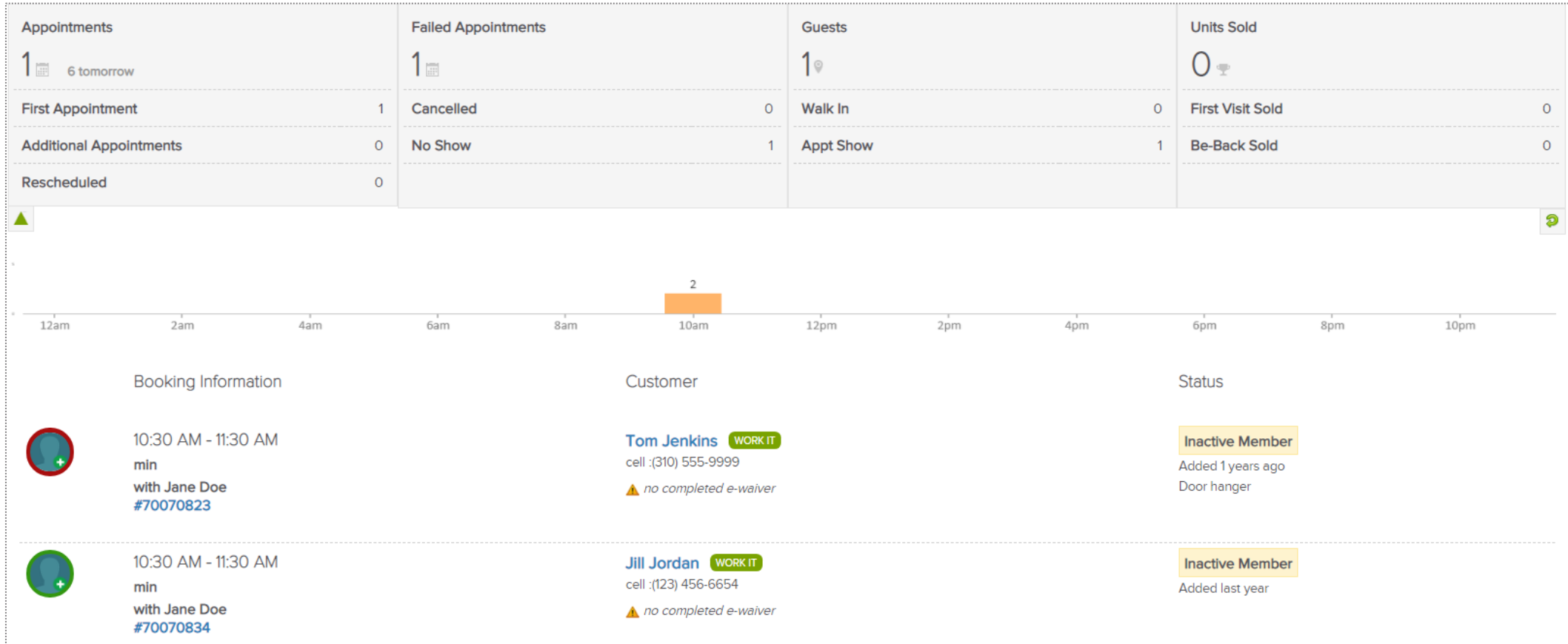
Main > Dashboard



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

Lead Management Dashboard – Guest Log

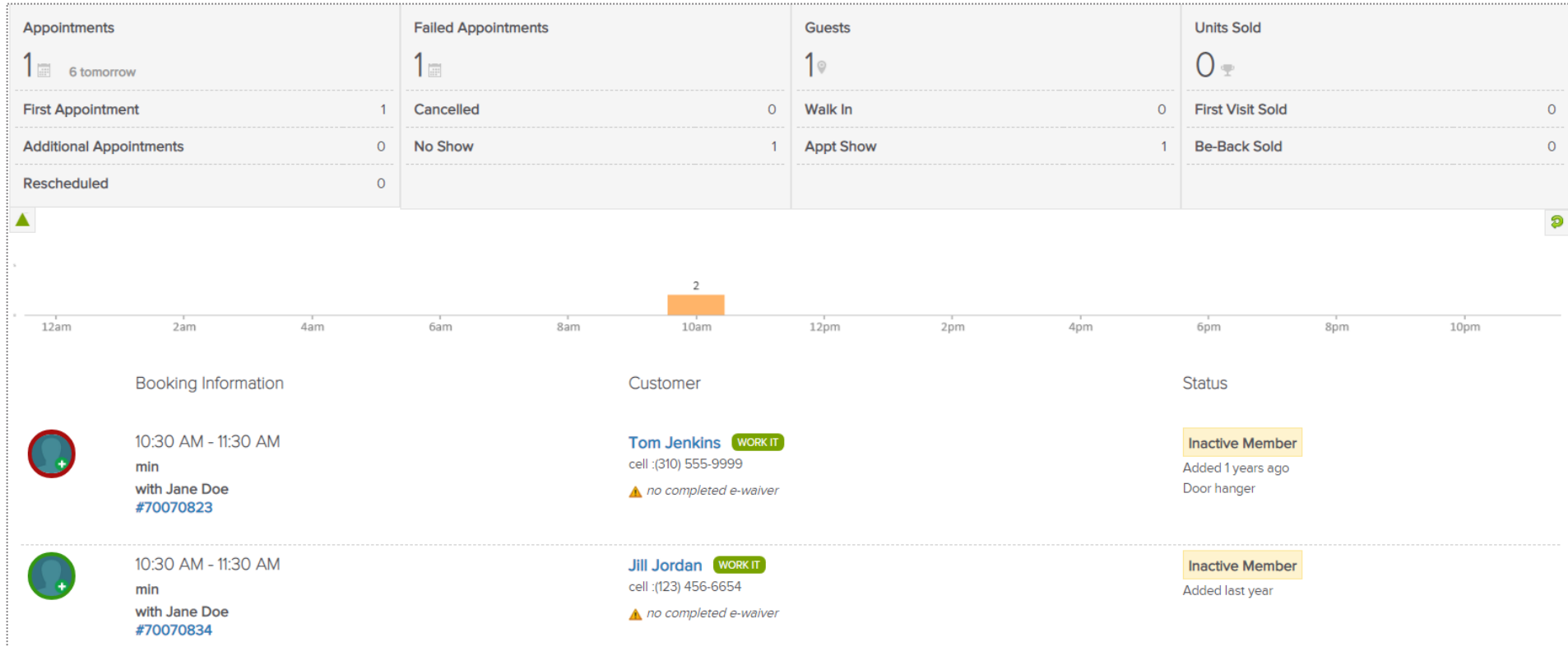
Main > Dashboard



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

Lead Management Dashboard – Guest Log

Main > Dashboard



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



Prospect Management / Tasks



Entering a Prospect

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

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

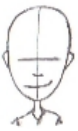
Gender <small>REQ</small>	<input type="checkbox"/> Male <input type="checkbox"/> Female
<input checked="" type="checkbox"/> include in duplicate search	
First Name <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Last Name <small>REQ</small>	<input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

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

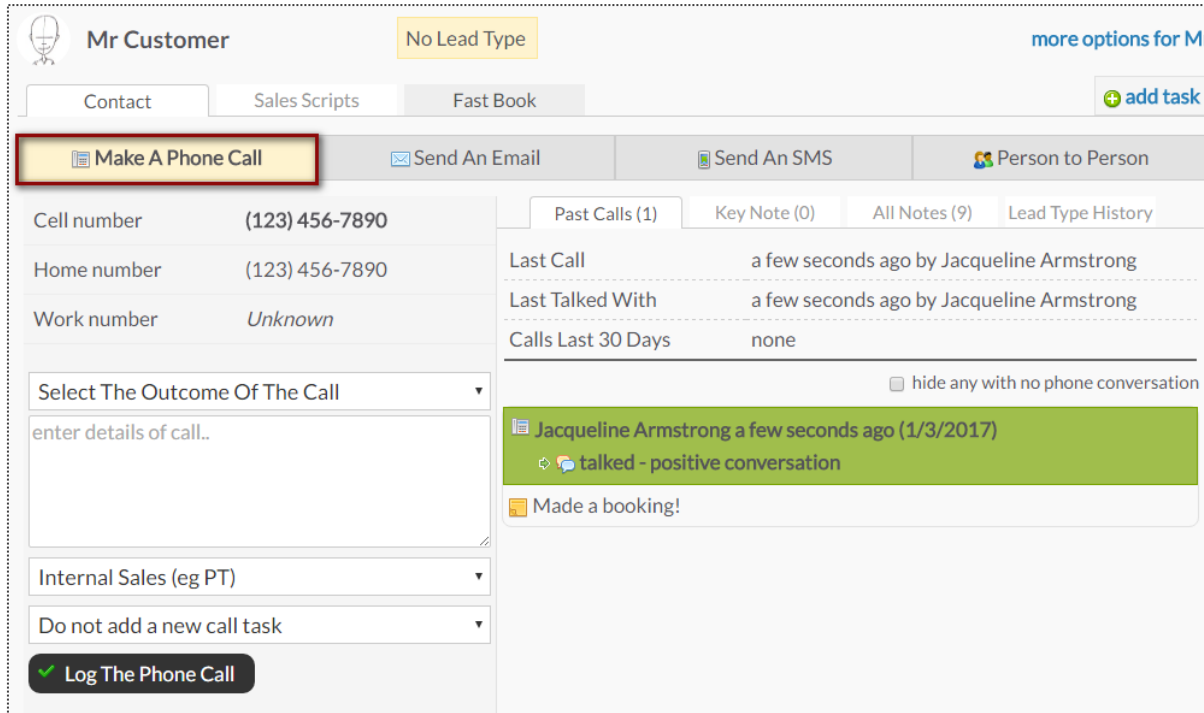
 **Tasks For Customers** Show all customer tasks
click to filter tasks by team member assigned

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

WORK IT Mr Customer ⚠ Send SMS to client Tracy T 11/14/2016 No Priority ✖

Work It – Phone Calls




The screenshot displays a CRM interface for a customer named "Mr Customer". The interface is divided into several sections:

- Header:** "Mr Customer" with a "No Lead Type" tag and a "more options for Mr" link.
- Navigation:** Tabs for "Contact", "Sales Scripts", and "Fast Book". A "add task" button is visible.
- Action Bar:** Buttons for "Make A Phone Call" (highlighted with a red box), "Send An Email", "Send An SMS", and "Person to Person".
- Contact Information:**
 - Cell number: (123) 456-7890
 - Home number: (123) 456-7890
 - Work number: Unknown
- Call History:**
 - Buttons: "Past Calls (1)", "Key Note (0)", "All Notes (9)", "Lead Type History".
 - Summary: "Last Call" and "Last Talked With" both occurred "a few seconds ago" by "Jacqueline Armstrong". "Calls Last 30 Days" are "none".
 - Filter: "hide any with no phone conversation" (unchecked).
 - Log: "Jacqueline Armstrong a few seconds ago (1/3/2017)" with a note "talked - positive conversation".
 - Log: "Made a booking!"
- Form Fields:**
 - "Select The Outcome Of The Call" dropdown.
 - Text area: "enter details of call..".
 - "Internal Sales (eg PT)" dropdown.
 - "Do not add a new call task" dropdown.
 - "Log The Phone Call" button with a green checkmark.

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

Work It - Contact

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

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

Make A Phone Call Send An Email Send An SMS Person to Person

Cell number	(123) 456-7890	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..

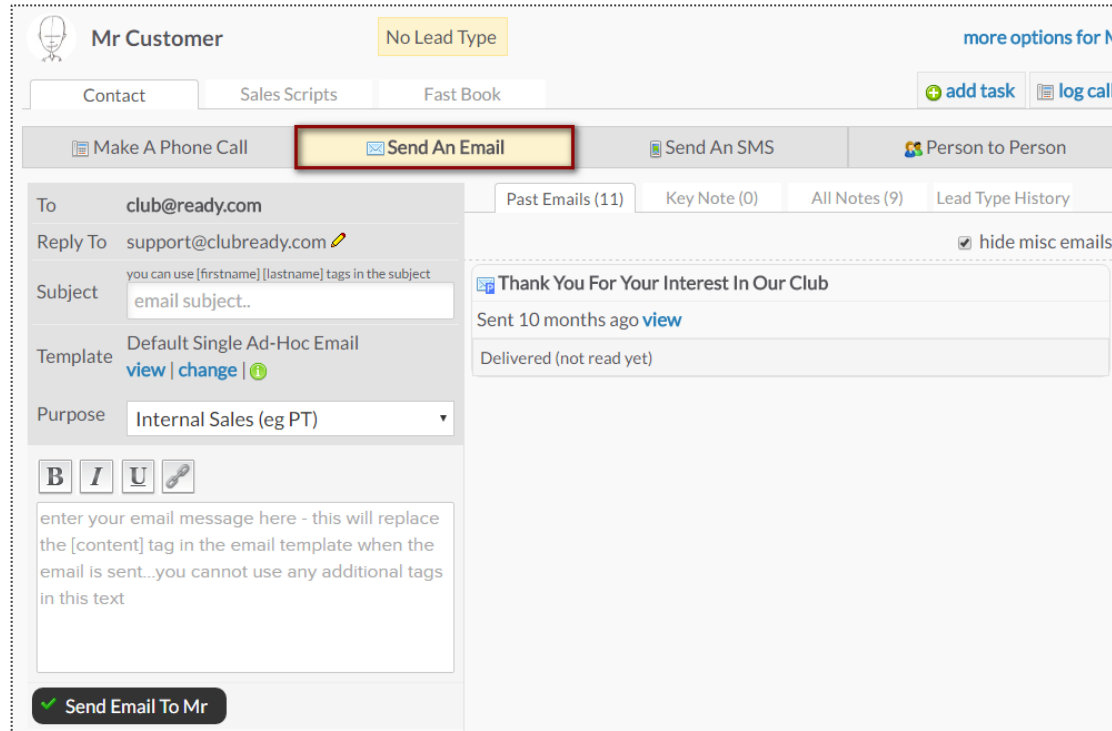
Internal Sales (eg PT)

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 – Emails



The screenshot displays a CRM interface for a lead named "Mr Customer" with a "No Lead Type". The interface includes several tabs: "Contact", "Sales Scripts", "Fast Book", "Make A Phone Call", "Send An Email" (highlighted with a red box), "Send An SMS", and "Person to Person". There are also buttons for "add task" and "log call".

The "Send An Email" tab is active, showing the following details:

- To:** club@ready.com
- Reply To:** support@clubready.com
- Subject:** you can use [firstname] [lastname] tags in the subject email subject..
- Template:** Default Single Ad-Hoc Email (with "view" and "change" links)
- Purpose:** Internal Sales (eg PT)

Below the form fields are formatting icons (B, I, U, link) and a text area with the instruction: "enter your email message here - this will replace the [content] tag in the email template when the email is sent...you cannot use any additional tags in this text". A "Send Email To Mr" button is at the bottom left.

On the right side, there is a "hide misc emails" checkbox and a list of email history. The first entry is:

- 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 – SMS (Text Messages)

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

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

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

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

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

Membership Sales

log task as complete and go to next task

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

✓ Mark All SMS Read

SMS History Key Note (0) All Notes (124) Lead Type History

Hello, see you soon!

OUT @ 07/11/18 6:00 AM

REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity

OUT @ 07/18/18 6:00 AM

REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity

OUT @ 07/25/18 6:00 AM

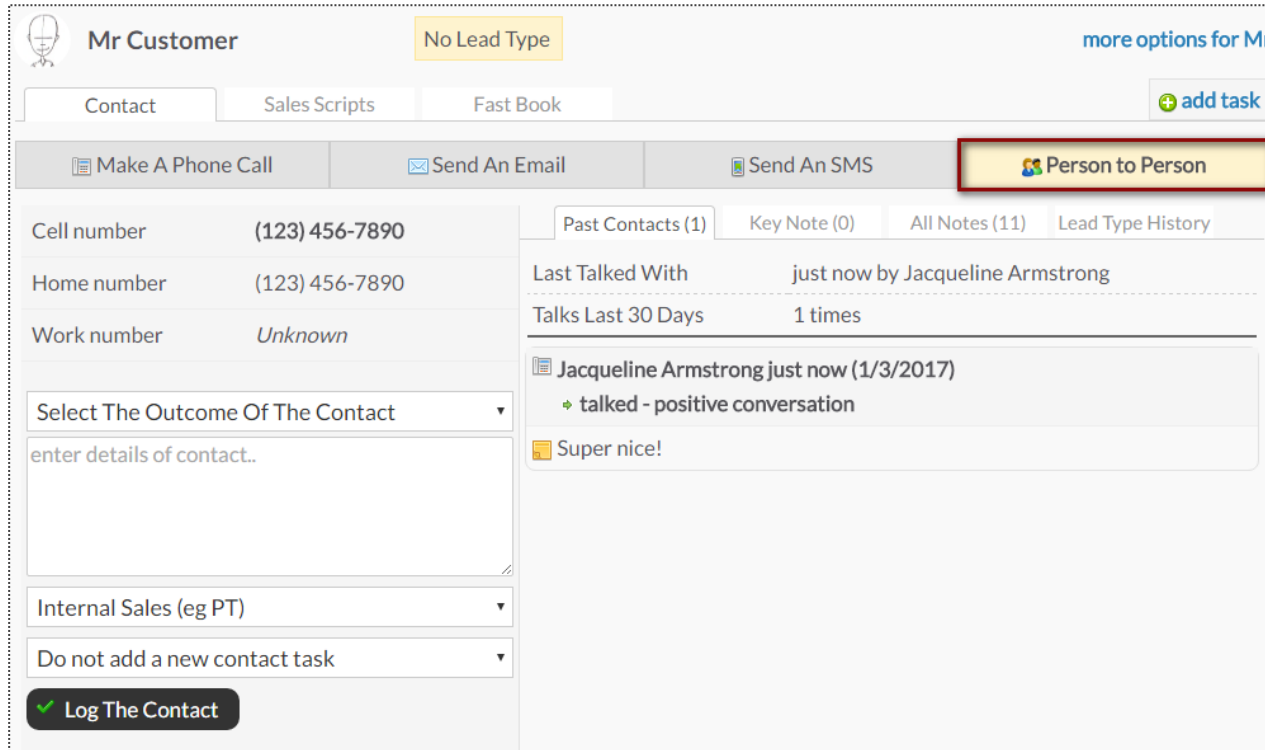
REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity

OUT @ 11/06/18 7:00 AM

REMINDER you have a Fitness Consultation session today at 7:00 AM with Charlie Clubowner

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 screenshot displays a CRM interface for a contact named "Mr Customer". At the top, there is a profile icon, the name "Mr Customer", a "No Lead Type" tag, and a "more options for Mr" link. Below this are tabs for "Contact", "Sales Scripts", and "Fast Book", along with an "add task" button. A navigation bar contains "Make A Phone Call", "Send An Email", "Send An SMS", and a highlighted "Person to Person" tab. The main content area is split into two columns. The left column shows contact information: Cell number (123) 456-7890, Home number (123) 456-7890, and Work number Unknown. It also includes a dropdown for "Select The Outcome Of The Contact", a text area for "enter details of contact..", a dropdown for "Internal Sales (eg PT)", and another dropdown for "Do not add a new contact task". A "Log The Contact" button is at the bottom left. The right column shows interaction history with tabs for "Past Contacts (1)", "Key Note (0)", "All Notes (11)", and "Lead Type History". It displays "Last Talked With just now by Jacqueline Armstrong" and "Talks Last 30 Days 1 times". A list of interactions includes "Jacqueline Armstrong just now (1/3/2017)" with a note "talked - positive conversation" and a sticky note "Super nice!".

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

Work It – Sales Scripts

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

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

Book That Prospect ▼

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

I thought so. How exciting!

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

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

Do you have any injuries?

What are your goals?

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




Great!

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

Work It – Fast Book



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





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

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

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

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

Consults  Services  Classes

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

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

Work It – Fast Book

Mr Customer | No Lead Type | more options for Mr

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

Consults | Services | Classes

Fitness Consult 30min | 30m

All Day | Morning | Afternoon | Evening | With All Staff Members

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

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

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

Mr Customer | No Lead Type | more options for Mr

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

Consults | Services | Classes

Fitness Consult 30min | 30m



Tuesday, January 10 | choose a different date

Apply booking rules | Only show times consult most likely to show

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

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

Work It – Automation

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



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

Upcoming (7) History (33)

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

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

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

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

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

Upcoming (7) **History (33)**

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


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

Widget – Unread Incoming SMS

Main > Dashboard

Unread Incoming SMS Messages (3) —

All Staff ▼

Garrett Anderson		WORK IT
Mickey Mouse		WORK IT
Fred Jones		WORK IT

SMS History | Key Note (0) | All Notes (18) | Lead Type History

OUT @ 11/16/17 11:19 AM

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

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

Can we do a session tomorrow at 4pm?

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

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

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

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

Creating & Editing Sales Scripts

Setup > Leads > Sales Scripts

Book That Prospect!!

TITLE B I U      

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

I thought so. How exciting!

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

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

Do you have any injuries?

What are your goals?

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

Great!

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

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

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







When finished click **Update Sales Script**.



Communications

Create Announcement

Setup > Communications > Announcements

Announcement Title	<input type="text"/>
Shows To Who	Select Who Should See It ▾
Always Show Announcement	<input type="checkbox"/>
Start Date	<input type="text"/> <small>(if blank announcement will start immediately)</small>
End Date	4/2/2015 <small>(if blank will always show to relevant users who have not seen it yet - even new staff added months later - you should typically always include an end date)</small>
Include a Poll? <small>(the poll question should be in the announcement title or text)</small>	<input type="radio"/> Yes <input checked="" type="radio"/> No
The Announcement <small>note - you can use the tag [firstname] and it will get replaced by the first name of the person who reads the announcement note - you can use the tag [daysUntil(date)], replacing (date) with a valid date, and it will be replaced with the number of Days between the current date and the given date</small>	<div><p>TITLE B I U      </p><p><small>Note - This WYSIWYG editor is a HTML5 editor - which is not supported by Internet Explorer 9 and below. Use a more modern browser such as Chrome / Firefox or IE 10+</small></p><div style="border: 1px solid #ccc; height: 150px;"></div></div>
Include Acknowledgement Text / Checkbox <small>If this is included then text tied to a checkbox is added to the end of the announcement and the announcement cannot be closed until the checkbox is selected.</small>	<input type="checkbox"/>
Display in Past Announcements Page	Show In Archive Page Forever ▾

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

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

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

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

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

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




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

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

Create A New File Folder

Folder Name

Choose A Parent Folder.

Root Level (No Parent)

Select Who can See The Folder.

Select Who Should See It

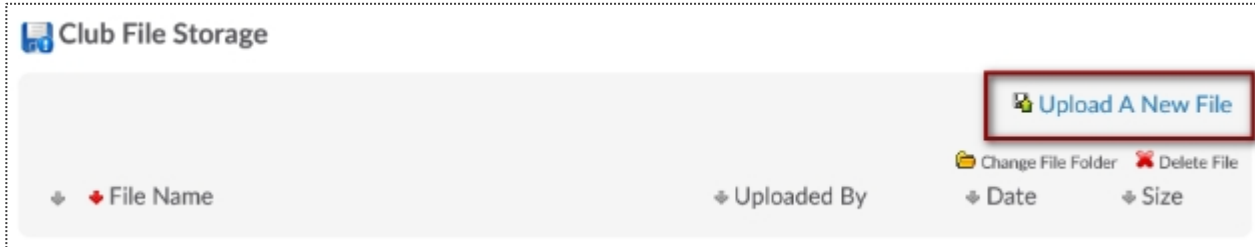
Folder Name: Type in the desired name for the file folder.

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

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

Upload A File To A File Folder

Setup > General > File Folders



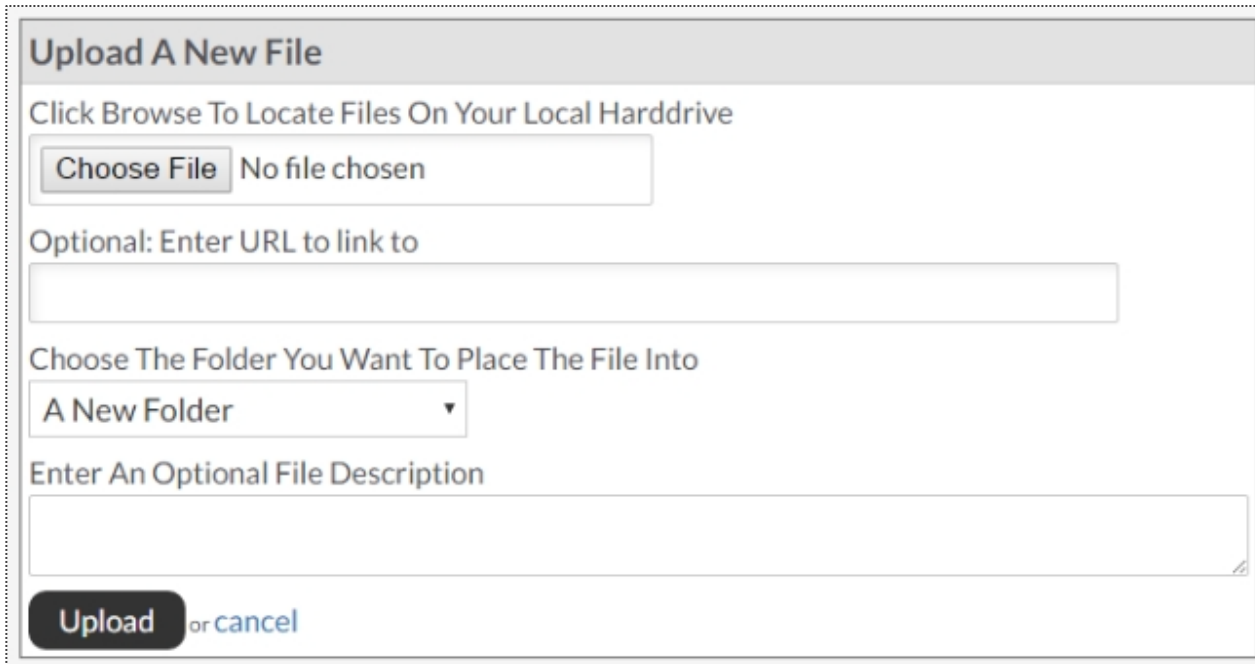
Club File Storage

Upload A New File

Change File Folder Delete File

File Name Uploaded By Date Size

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



Upload A New File

Click Browse To Locate Files On Your Local Harddrive

Choose File No file chosen

Optional: Enter URL to link to

Choose The Folder You Want To Place The File Into

A New Folder

Enter An Optional File Description

Upload or cancel

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











Important Files Widget


Setup > Staff > Files Widget






Add A File To The Files Dashboard Widget

Select A File Category There are no files in this folder

Current Files Shown On The Files Dashboard Widget (5)

 Yummy Recipe	13 KB	
 Black Friday Special_[1]11-24-2015.jpg	217 KB	
 LetsDoThis.png	26 KB	
 Gym FAQ	82 KB	
 Employee_Handbook.pdf	82 KB	

 **Important Club Files**

 Yummy Recipe
 Black Friday Special_[1]11-24-2015.jpg
 LetsDoThis.png
 Gym FAQ
 Employee_Handbook.pdf

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

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

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

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

Big Sale!

CREATE A BLANK TEMPLATE

CLONE AN EXISTING TEMPLATE

CLONE A SYSTEM DEFAULT

CLONE A NEWSLETTER TEMPLATE

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

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

Add The New Email Template

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

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

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



Email Templates

Setup > Communications > Email Templates

General Editor Tag Info

Insert a tag ▼ Insert an image ▼ Save

</> ¶ B I T [List Icons] [Image Icon] [Table Icon] [Link Icon] [Unlink Icon] [Text Color] [Background Color]

Can't view this email properly? [view in browser](#)

[header]

Hello Customer!

Don't Miss out on our [BIG SALE!](#)

[Visit our Website](#)

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

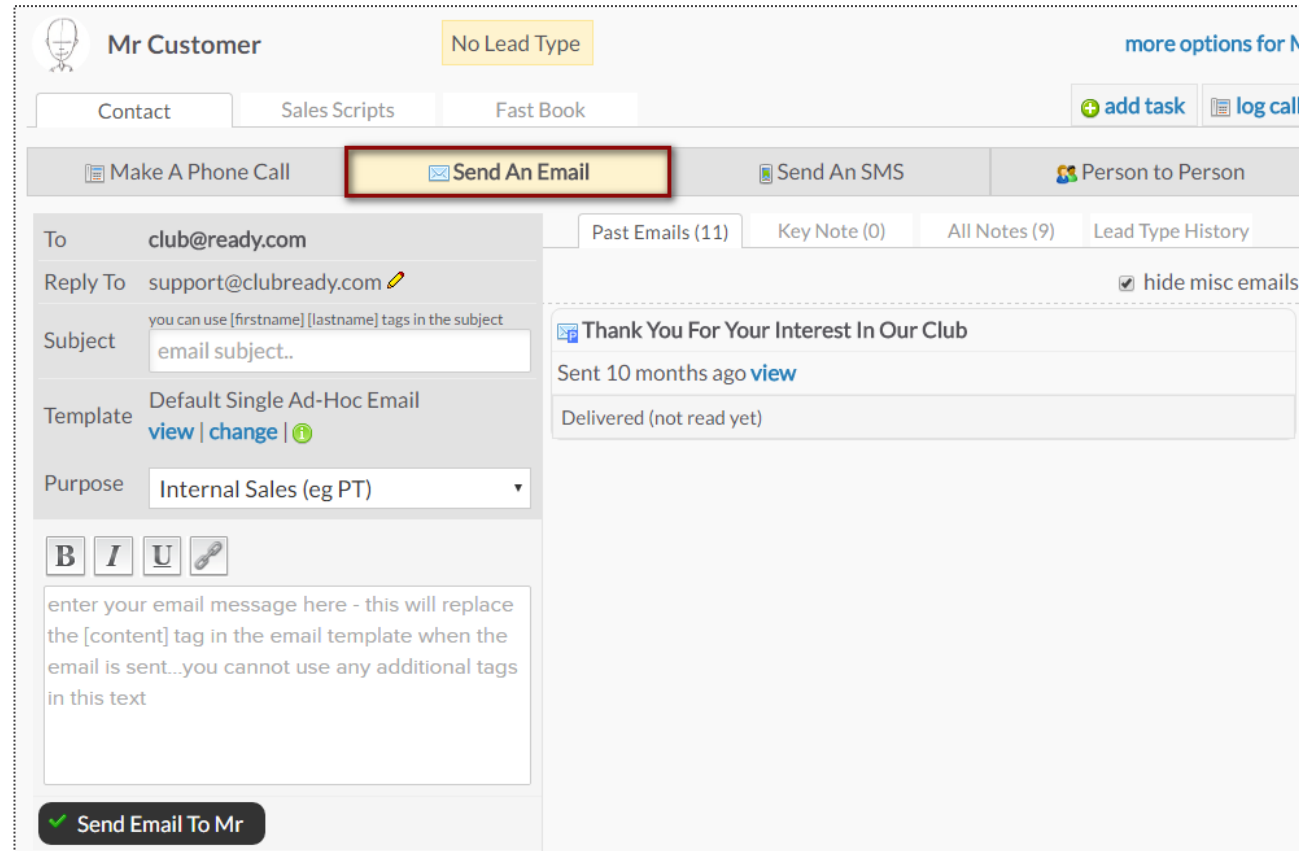
Choose from **Inserting a Tag** or **Inserting an image** to display for your users.

NOTE:

- Avoid using copy + paste from Microsoft Word.

Individual Emails

Prospect/Member Account > Work It

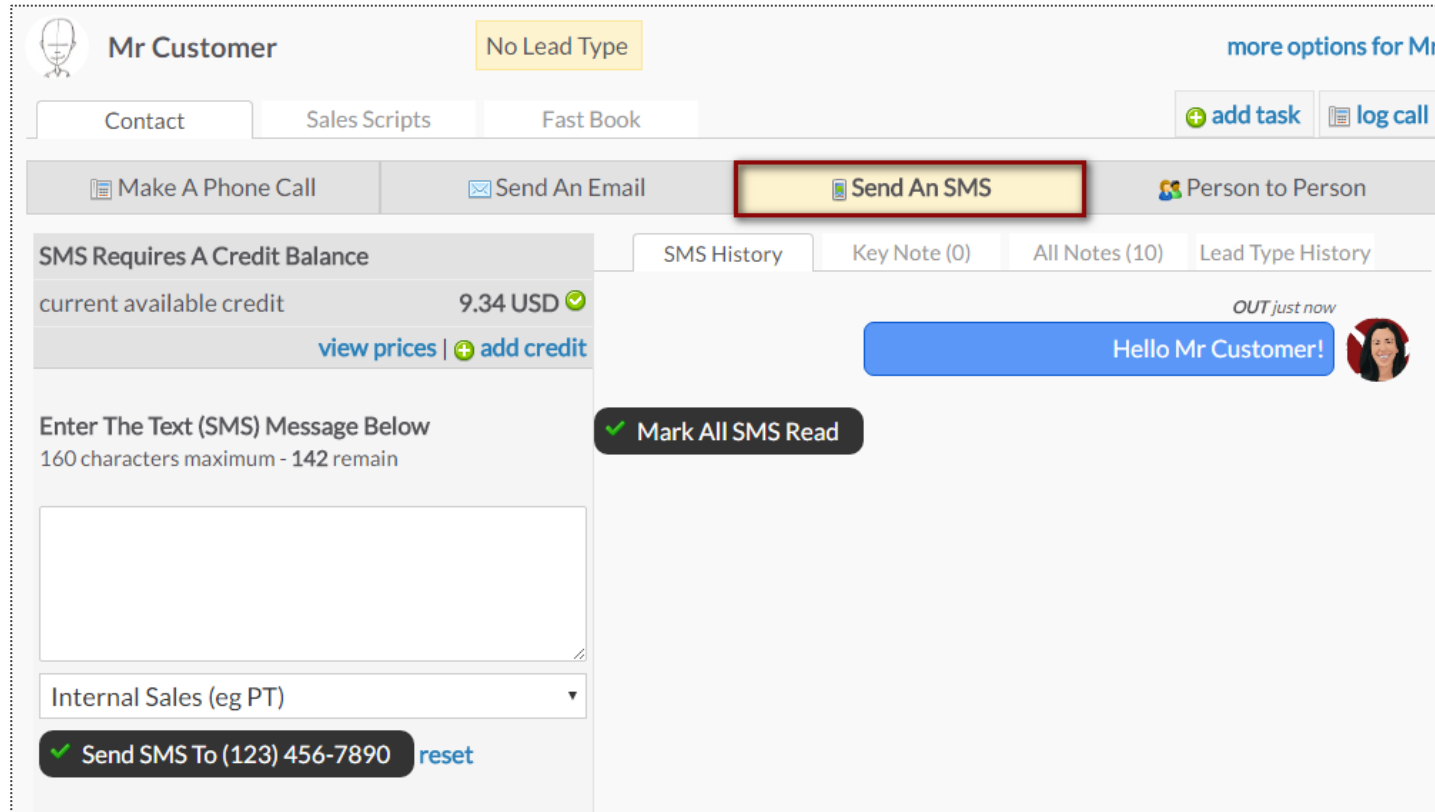


The screenshot shows a CRM interface for a prospect/member account. The top navigation bar includes 'Mr Customer', 'No Lead Type', and 'more options for M'. Below this are tabs for 'Contact', 'Sales Scripts', and 'Fast Book', along with '+ add task' and 'log call' buttons. A central action bar contains 'Make A Phone Call', 'Send An Email' (highlighted with a red box), 'Send An SMS', and 'Person to Person'. The left sidebar shows email details: 'To: club@ready.com', 'Reply To: support@clubready.com', 'Subject: you can use [firstname] [lastname] tags in the subject email subject..', 'Template: Default Single Ad-Hoc Email', and 'Purpose: Internal Sales (eg PT)'. The right sidebar shows a list of past emails, with the most recent one titled 'Thank You For Your Interest In Our Club' sent 10 months ago. The bottom of the interface features a 'Send Email To Mr' button.

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

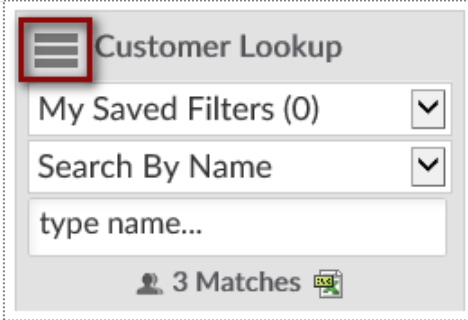
Prospect/Member Account > Work It



The screenshot shows the 'Send An SMS' interface for a prospect/member account. The account name is 'Mr Customer' with a 'No Lead Type' tag. The interface includes a navigation bar with 'Contact', 'Sales Scripts', and 'Fast Book' tabs, and buttons for '+ add task' and 'log call'. The 'Send An SMS' button is highlighted with a red box. Below the navigation bar, there are tabs for 'Make A Phone Call', 'Send An Email', 'Send An SMS', and 'Person to Person'. The 'Send An SMS' section displays 'SMS Requires A Credit Balance' with a current available credit of 9.34 USD and a 'view prices | + add credit' link. A text input field is provided for the message, with a character count of 160 characters maximum - 142 remain. A dropdown menu for 'Internal Sales (eg PT)' is visible. A 'Send SMS To (123) 456-7890' button is shown with a 'reset' link. The message history shows a blue bubble with the text 'Hello Mr Customer!' and a profile picture of a woman, with the status 'OUT just now'. A 'Mark All SMS Read' button is also present.

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




Customer Lookup

My Saved Filters (0) ▼

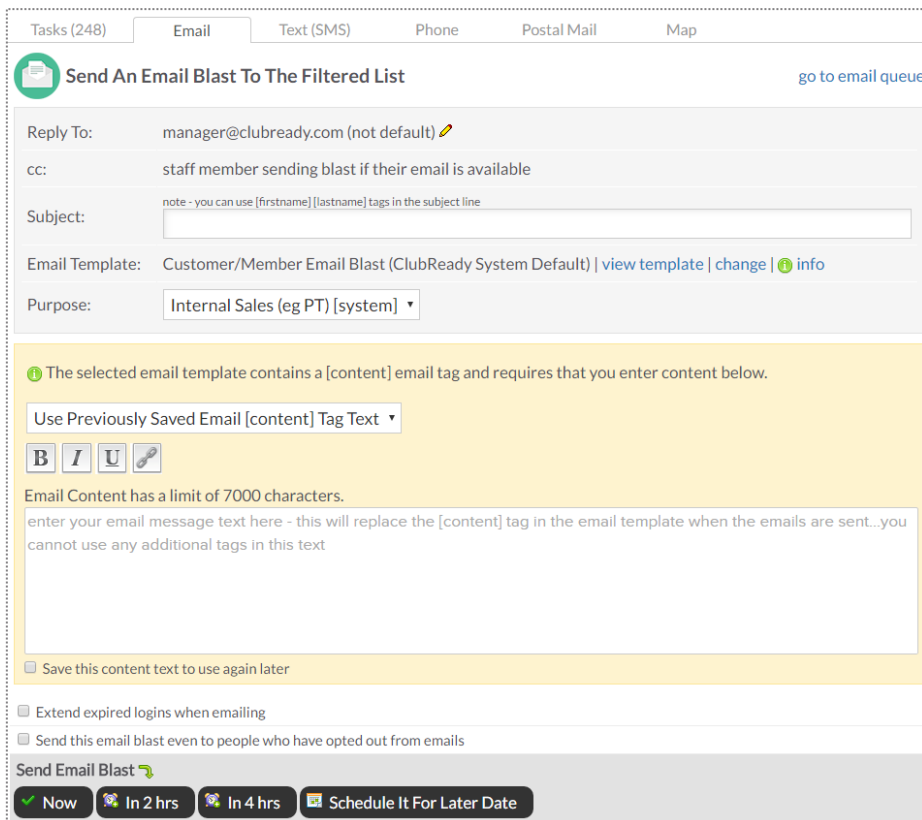
Search By Name ▼

type name...


3 Matches 


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.




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 

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:

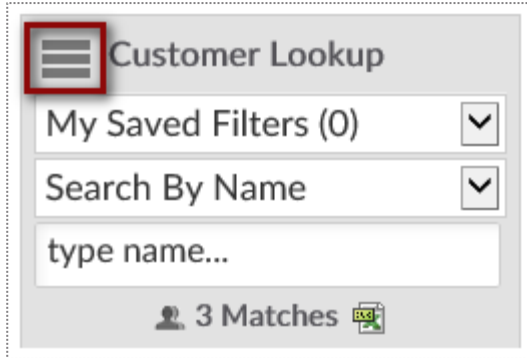
Save this content text to use again later - If you are going to send this out on a regular basis.

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

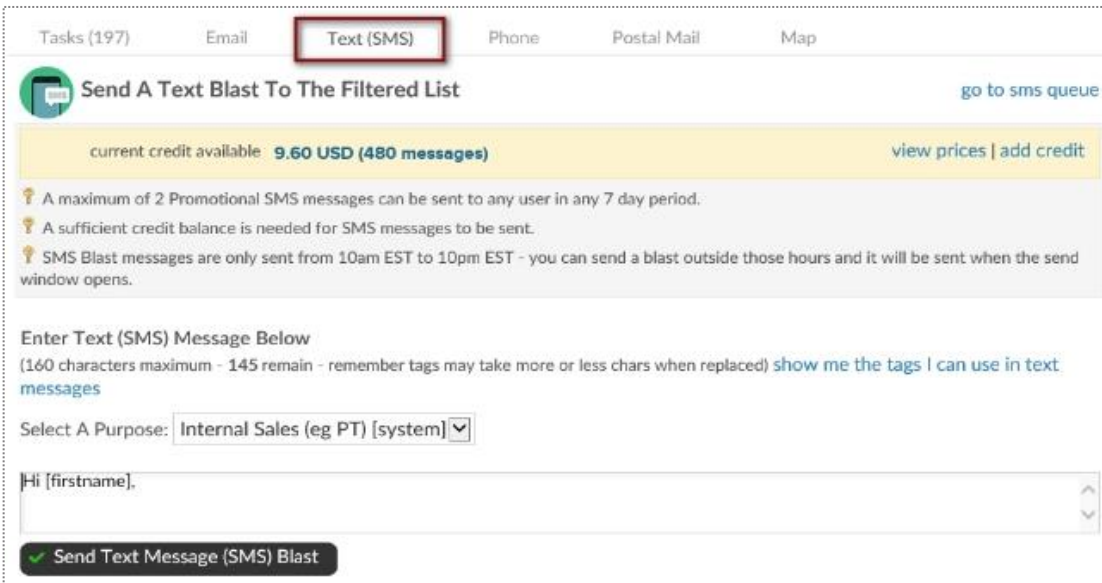
Prospects/Members > Text (SMS)



A dropdown menu titled "Customer Lookup" is shown. It contains a hamburger menu icon (three horizontal bars) highlighted with a red box. Below the title are two dropdown menus: "My Saved Filters (0)" and "Search By Name". A search input field contains the placeholder text "type name...". At the bottom, it shows "3 Matches" with a person icon and a document icon.

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 screen displays the "Send A Text Blast To The Filtered List" interface. At the top, there are navigation tabs: "Tasks (197)", "Email", "Text (SMS)" (highlighted with a red box), "Phone", "Postal Mail", and "Map". Below the tabs, there is a header "Send A Text Blast To The Filtered List" with a "go to sms queue" link. A yellow banner shows "current credit available 9.60 USD (480 messages)" with "view prices | add credit" links. Below this, there are three informational messages: "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.", and "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." The main section is titled "Enter Text (SMS) Message Below" with a character count "(160 characters maximum - 145 remain - remember tags may take more or less chars when replaced)" and a link "show me the tags I can use in text messages". There is a "Select A Purpose:" dropdown menu with "Internal Sales (eg PT) [system]" selected. Below this is a text input field containing "Hi [firstname]". At the bottom, there is a "Send Text Message (SMS) Blast" button with a green checkmark icon.

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


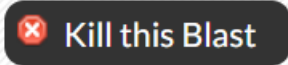
Live Send Queue

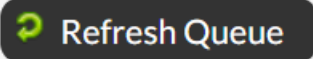
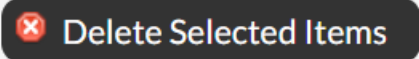
Reports > Communications > Live Send Queue

Communications Live Queue

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

Email | SMS (Text) | Mobile Push

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

Select All transactional | blasts  Refresh Queue  Delete Selected Items

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

Basic Email Settings

Setup > Communications > Communication Settings

Basic Email Settings

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

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

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

Default Email Signature - what you would like clients to see for your email signature. In any email blast you can use the tag [defaultsignature] 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.



Agreement Write Up

Write Up New Agreement – Search For User

Main > Write up New Agreement > Search for client

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

Mr Customer

Before Proceeding To The Agreement Selection Please Confirm Their Details


First Name REQ	Mr
<input checked="" type="checkbox"/> include in duplicate search	
Last Name REQ	Customer
<input checked="" type="checkbox"/> include in duplicate search	
Gender REQ	<input checked="" type="radio"/> MALE <input type="radio"/> FEMALE
<input type="checkbox"/> include in duplicate search	
Email	customer@cp.com
<input type="checkbox"/> include in duplicate search	
Cell Phone REQ	85512147946
Home Phone	
Work Phone	
<input type="checkbox"/> include in duplicate search	
Date Of Birth	Month ▾ Day ▾ Year ▾
Address REQ	1 Main Street
City REQ	Anywhere
State REQ	MO
ZIP Code REQ	63001
Drivers License No.	
Barcode	
External User ID	



Confirm


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

Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates

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

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

 **SECURE**

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

8 X RH Class Credit classes

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

Buyers Name

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

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

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

Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates


Opportunity Setup [minimize installment list](#)

\$ [Update All 6 Installment Prices](#)

# 1	Down	\$ <input type="text" value="50"/>	<input type="text" value="11/10/2017"/>
# 2	Draft	\$ <input type="text" value="50"/>	<input type="text" value="12/10/2017"/>
# 3	Draft	\$ <input type="text" value="50"/>	<input type="text" value="1/10/2018"/>
# 4	Draft	\$ <input type="text" value="50"/>	<input type="text" value="2/10/2018"/>
# 5	Draft	\$ <input type="text" value="50"/>	<input type="text" value="3/10/2018"/>
# 6	Draft	\$ <input type="text" value="50"/>	<input type="text" value="4/10/2018"/>

[Auto-Renew Evergreen explain](#) Yes No (Basic Membership Plan) At \$

[Annual Enhancement Fee](#) Yes No \$ on every 12 months

Term Total Price	\$300.00
Term Amount Paid Today	\$50.00
Amenity Term Total	\$0.00
Amenity Total Today	\$0.00
Subtotal	\$50.00
Sales Tax	\$0.00
Account Credit Balance	\$0.00
Total Due Today 	\$50.00 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.

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

Apply a Package Discount

Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup



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

# 1	<input type="button" value="Down"/>	\$ 29.99 <small>+ tax</small>	11/10/2017
Total Price (taxed @ 7.000%)		\$29.99	
Amenity Term Total		\$0.00	
Amenity Total Today		\$0.00	
Subtotal		\$29.99	
Sales Tax		\$2.10	
Account Credit Balance		\$0.00	
Total Due Today <input type="checkbox"/>		\$32.09	

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

Opportunity Setup		Brooks Discount	Enter Promo Code	<input checked="" type="checkbox"/> Apply Discount	Reset Discount
# 1		\$ 29.99 + tax		\$26.99	11/10/2017
Total Price (taxed @ 7.000%)		\$29.99		\$26.99	
Amenity Term Total		\$0.00		\$0.00	
Amenity Total Today		\$0.00		\$0.00	
Subtotal		\$29.99		\$26.99	
Sales Tax		\$2.10		\$1.89	
Account Credit Balance		\$0.00		\$0.00	
Total Due Today 		\$32.09		\$28.88	

Once applied, it will automatically display the discount.

Write Up New Agreement

Assigning Sales Commission & Member Contact

Responsible Staff
Choose staff for sale

Assign Staff
Choose staff member

Optional Note
Enter an optional note here....





 SAVE AND GO TO STEP 2 - Review & Finalize


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


Write Up New Agreement


Review Terms > Take Signatures

 Write Up A New Agreement For Mr Customer [17232421]

Step 1  Agreement Setup

Step 2  Review & Finalize

Step 3  Complete


 **SECURE**


Review [hide review details](#)

- ✔ Membership 1: 4 Classes a Month (x 3 Installments)
- ✔ Total initial term price is \$261.00
- ✔ Total number of sessions is 12 over the term
- ✔ Total Down Payment Today \$87.00
- ✔ First installment payment is today for \$87.00
- ✔ Followed by 2 monthly installments.
- ✔ Then auto-renew at \$87.00
- ✔ The next automatic installment is on 8/11/2017 for \$87.00

Agreement

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

 **UNSIGNED AGREEMENT**
CLICK TO REVIEW & SIGN

 **CLICK HERE TO ONLY TAKE SIGNATURES**

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

Select here to open full agreements for signatures.

Taking Signatures

Review Contract & Take Signatures

View Unsigned Agreement

jump to signature ▾ 1

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

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

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

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

Mr Customer

SIGN NOW SIGNATURE [click to sign](#)

05/11/2017

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

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

Electronic Signature 1 of 1

[CLICK TO SKIP THIS SIGNATURE](#)

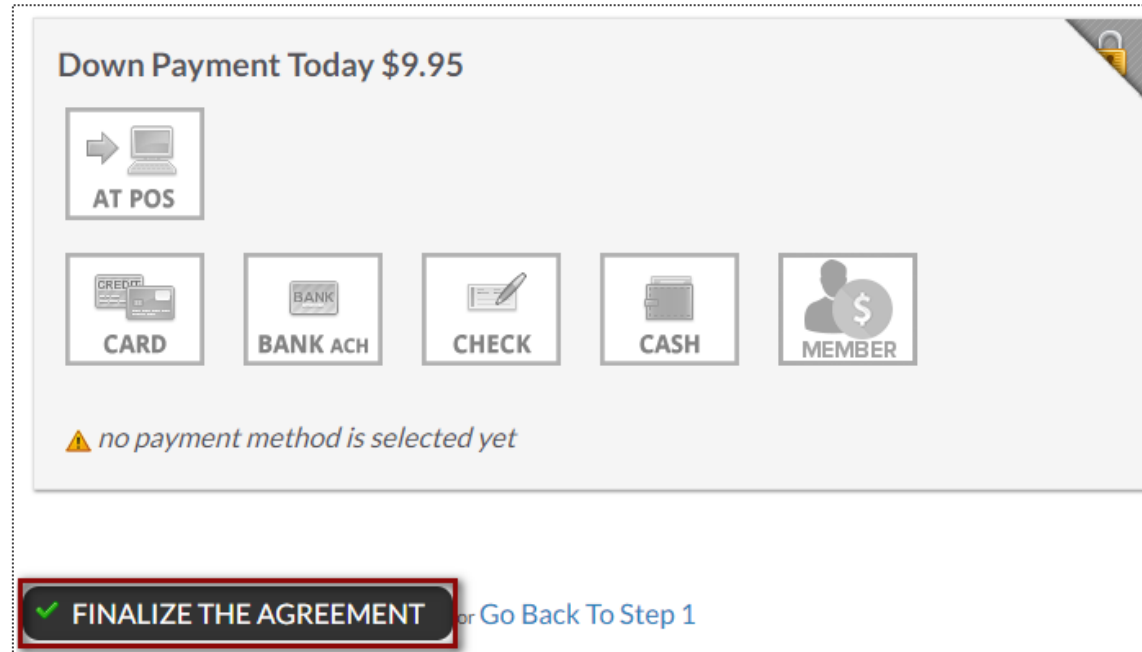
Sign here!

M. Custone

cancel

Writing a Membership Agreement

Take Payment & Finalize the Deal



Down Payment Today \$9.95

AT POS

CARD

BANK ACH

CHECK

CASH

MEMBER

⚠ no payment method is selected yet

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

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

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

Managing Agreement – Draft Status

Member > Agreement > Full Details

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

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

Managing Agreement – Auto Renew Evergreen

Member > Agreement > Full Details

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

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

Notes:

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

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



Member Management



Invoice Adjustments

Member > Billing > Invoices > Edit Pencil

5/1/2018	\$44.00	#97970023 MTM Deluxe Package 	Due on 5/1/2018	Membership
----------	---------	--	-----------------	------------

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

Options For Adjusting This Invoice

Automatically Draft This Invoice When Due
 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 \$	9.95
No Sales Taxes	\$
Due Date	6/4/2017

Change Package Type: Base Monthly


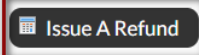
Optional Note

or cancel

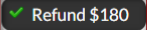
Selecting the option **Adjust The Invoice Details** will update the screen to display all options you can adjust for this one invoice. Make the desired changes to the invoice. Click the **Update** button to save changes.

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.

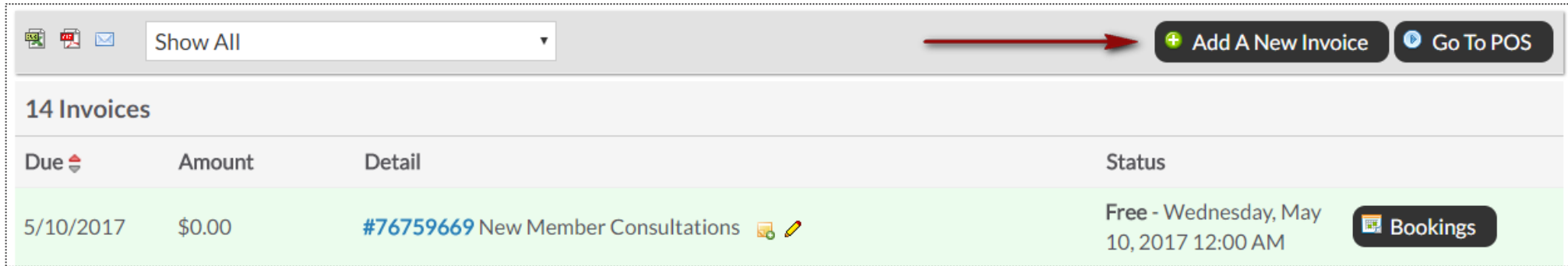
#76811337 Refund Paid Invoice Mister Customer	
\$180.00	
30Min Personal Training 4xMonth (monthly)	
Paid 5/11/2017 By Cash	
Customer Refund	
Refund Method	Select
Send Notification Email	Select
Partial Refund	Cash Written Check Client Credit Balance
Status of any associated bookings / credits	
Past bookings	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



The screenshot shows the 'Invoices' section of a software interface. At the top, there is a search bar with 'Show All' and a dropdown arrow. To the right of the search bar are two buttons: 'Add A New Invoice' (with a green plus icon) and 'Go To POS' (with a blue circular icon). A red arrow points from the search bar area towards the 'Add A New Invoice' button. Below the buttons, the text '14 Invoices' is displayed. A table with four columns is shown: 'Due', 'Amount', 'Detail', and 'Status'. The first row of the table is highlighted in light green and contains the following information: '5/10/2017', '\$0.00', '#76759669 New Member Consultations' (with a calendar and pencil icon), and 'Free - Wednesday, May 10, 2017 12:00 AM'. A 'Bookings' button is located to the right of the status text in this row.

Due	Amount	Detail	Status
5/10/2017	\$0.00	#76759669 New Member Consultations  	Free - Wednesday, May 10, 2017 12:00 AM 

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

+ Add A New Invoice

Don't Tie To An Existing Agreement

Select Sales Package or Fee Type

None
Cancellation Fee
Freeze Fee

Enter Invoice Description

Enter Invoice \$ Amount

\$

Enter Payment Due Date

6/9/2017

Enter An Optional Note


+ Create New Invoice or cancel

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

Freeze an Agreement




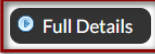
Member Account > Agreements > Full Details > Freeze Options

Detail **Agreements (2)** Bookings (0) Notes (9) Files (2) Tasks (0) Past 30 Days

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


WORK IT GO POS NEW DEAL BILLING BOOKINGS PRESENT PROFILE ALL DETAIL LEAD HIST.

Agreements List

5/11/2017	 Active Draft	\$1,080.00 (#4920210) 6 x 30Min Personal Training 4xMonth (monthly)  agr5844-15430951-11174724-c20273-sg2402  ELECTRONIC SIGNATURE	
-----------	--	---	---

Agreement Freeze Options

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

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

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

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

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

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

Agreements List

11/7/2016	● Active Draft	\$720.00 + \$50.00 in Fees (#4265319) 6 x 1xWeek 30 Minutes PT agr927-4077574-9193306-c1934-sg2069 ELECTRONIC SIGNATURE	Full Details
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- [Cancel This Agreement Effective Immediately](#)
- [Schedule This Agreement To Auto-Cancel On A Future Date](#)
- [Cancel & Refund All Payments To A Credit Balance For A Re-Write](#)

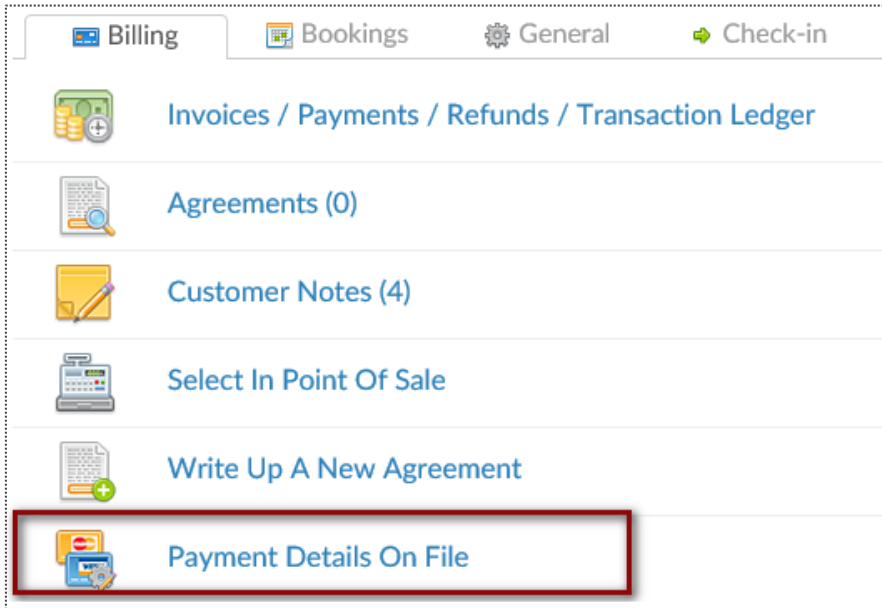
Cancel This Agreement Effective Immediately: This agreement will be cancelled today. All unpaid invoices will be cancelled.

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

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

Add/Update Credit Card on File

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

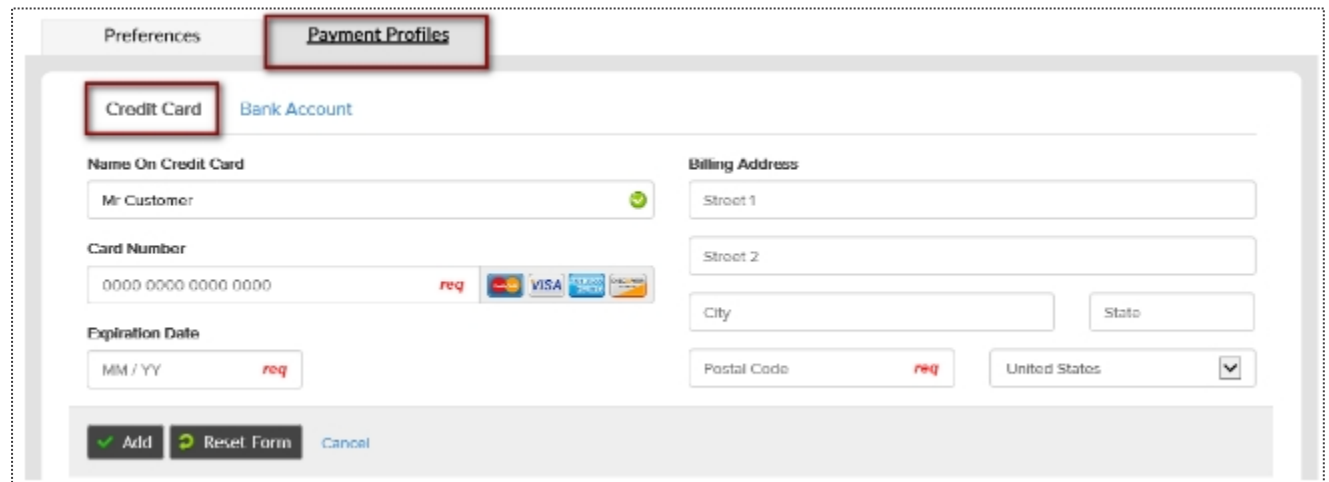


The screenshot shows a navigation menu with the following items:

- Billing
- Bookings
- General
- Check-in
- 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.

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.



The screenshot shows the 'Payment Profiles' form with the 'Credit Card' tab selected. The form includes the following fields:


- Name On Credit Card:** Mr Customer
- Card Number:** 0000 0000 0000 0000 (with a 'req' label and card icons for Visa, Mastercard, American Express, and Discover)
- Expiration Date:** MM / YY (with a 'req' label)
- Billing Address:** Street 1, Street 2, City, State, Postal Code (with a 'req' label), and United States (dropdown menu)

At the bottom of the form, there are three buttons: **Add** (with a green checkmark), **Reset Form** (with a circular arrow), and **Cancel**.

Update Member's Profile

Member Account > Profile

Detail | Agreements (1) | Bookings (0) | Notes (4) | Files (1) | Tasks (1) | Past 30 Days

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

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

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

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

Edit Membership Status

Member Account > All Detail > General > Edit Membership Status

[GO BACK](#)

MR CUSTOMER

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

Active Member - Buying Services

Member Since Date	<input type="text" value="2/13/2015"/>
Membership Expiration Date	<input type="text" value="1/21/2017"/>
Internal Prospect Type	<input type="text" value="PT Training Prospect"/>
Add A Note <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. Adjust the expiration date on PIF (Annual) members to **1 year after Opening Day**.


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












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

Add A Photo

Member Account > Green Plus Sign

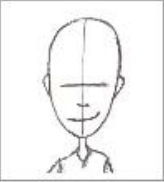
Detail | Agreements (0) | Bookings (0) | Notes (0) | Files (0) | Tasks (0) | Past 30 Days

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

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

[GO BACK](#)

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

 [REMOVE PHOTO](#)

[UPLOAD A PHOTO](#)

[WEBCAM PHOTO](#)

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

Member Notes

Member Account > All Detail > Member Notes

MR CUSTOMER

Select A Note Type



Was There Any Contact Involved?



Add a new note here...

Add



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

No Category Filter



No Date Filter



 NOV 21st 2016 : 9:05 AM  Email Blast : Holy Cow don't miss out! by : Natasha C.



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

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

Add a Member Alert

Member Account > All Detail > General > Alerts

MR CUSTOMER

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

Add A New Alert For MR

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

Notify Customer At Self Check-In

Add Alert

Existing Alerts

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

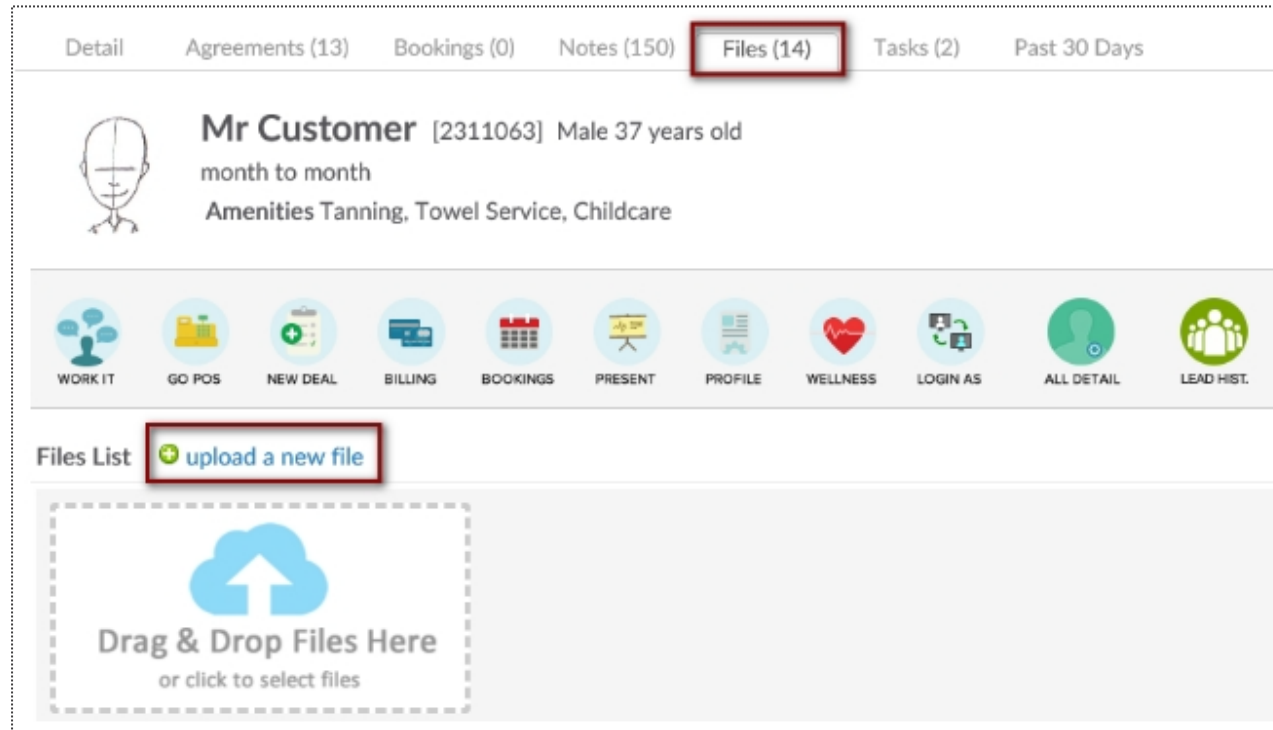
The **Add A New Alert** field allows you to enter a new message for staff.

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

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

Upload File To Client's Profile

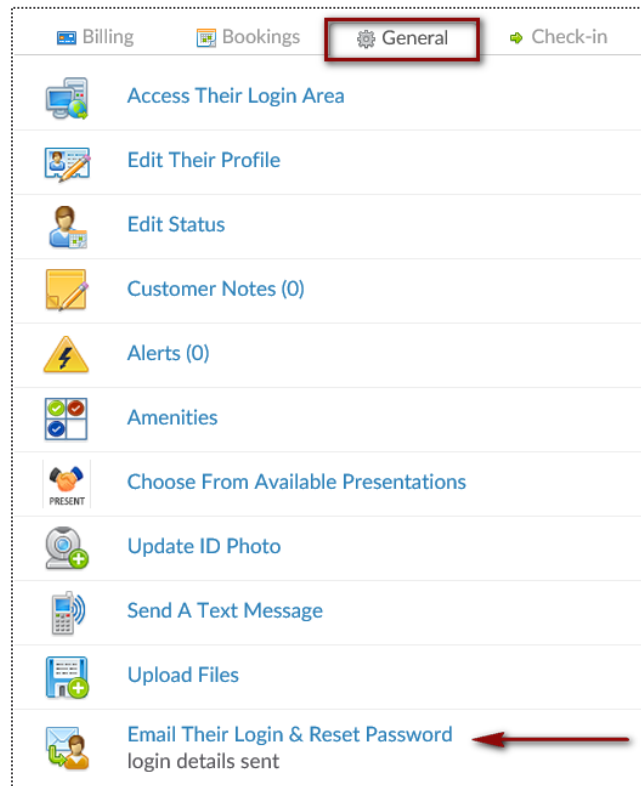
Setup > General > File Folders



The screenshot shows a user interface for a client profile. At the top, there are navigation tabs: Detail, Agreements (13), Bookings (0), Notes (150), **Files (14)**, Tasks (2), and Past 30 Days. Below the tabs is a profile card for 'Mr Customer' with ID [2311063], age 37, and gender Male. The card lists 'month to month' and 'Amenities Tanning, Towel Service, Childcare'. Below the profile card is a row of 11 icons representing different functions: WORK IT, GO POS, NEW DEAL, BILLING, BOOKINGS, PRESENT, PROFILE, WELLNESS, LOGIN AS, ALL DETAIL, and LEAD HIST. Below the icons is a 'Files List' section with a red-bordered button that says '+ upload a new file'. Below the button is a large dashed box containing a blue cloud icon with an upward arrow and the text 'Drag & Drop Files Here or click to select files'.

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

Email Login & Reset Password

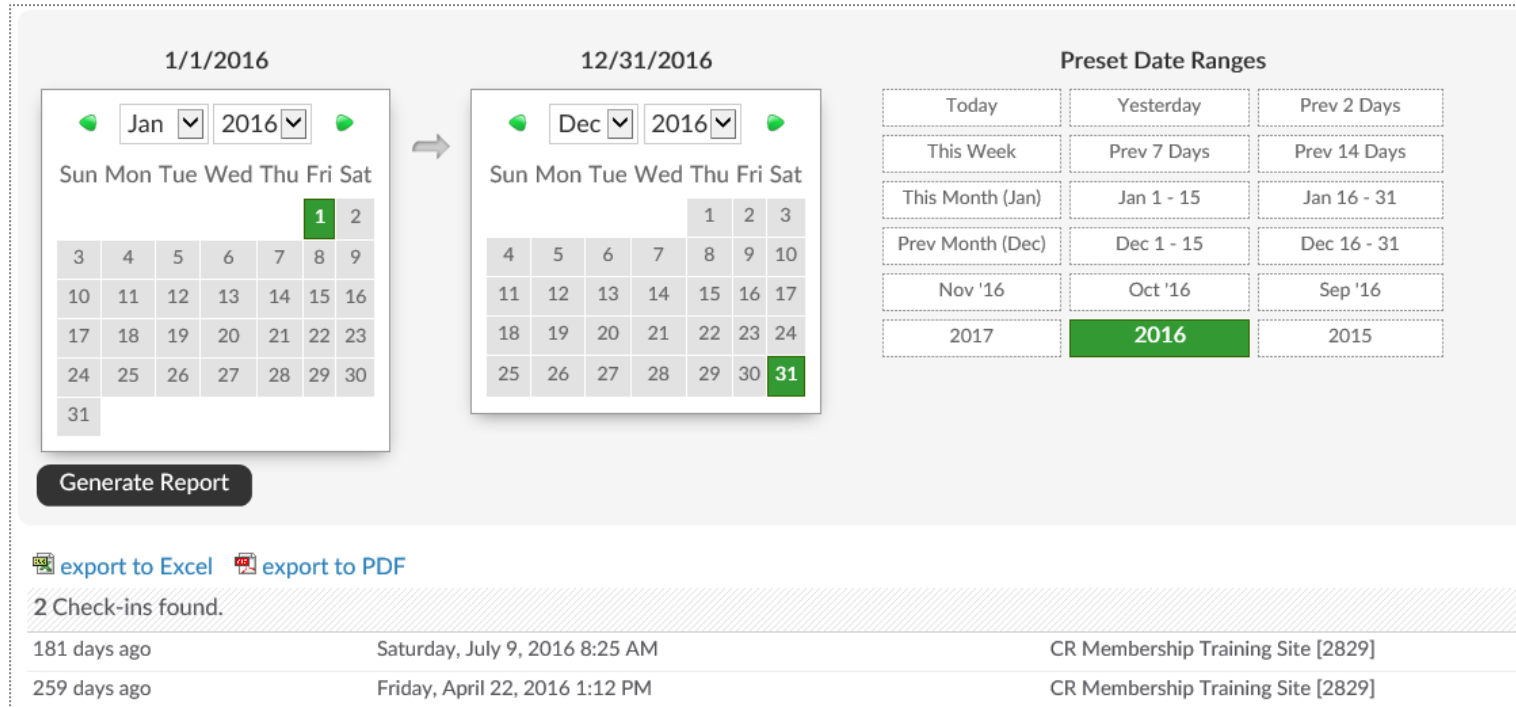


To access this screen click search and select the desired client. Verify the client has an email address, if not click the edit pencil to enter one. Click the **All Detail** button.

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

View Check – In History

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



1/1/2016

Jan 2016

Sun Mon Tue Wed Thu Fri Sat

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

12/31/2016

Dec 2016

Sun Mon Tue Wed Thu Fri Sat

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

Preset Date Ranges

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

Generate Report

[export to Excel](#) [export to PDF](#)

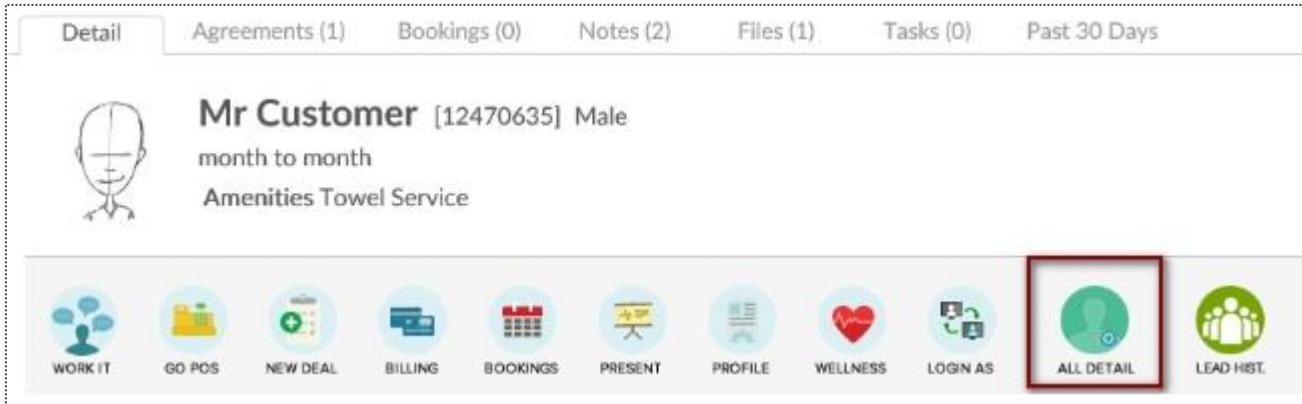
2 Check-ins found.

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]


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

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

Update Barcode/Fingerprint

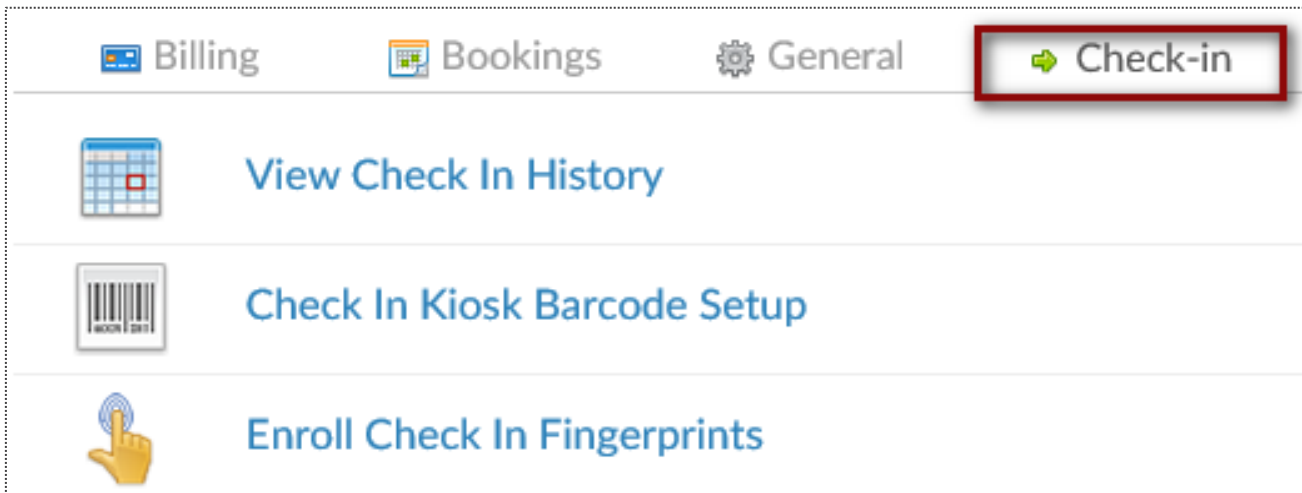


Detail | Agreements (1) | Bookings (0) | Notes (2) | Files (1) | Tasks (0) | Past 30 Days


 **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.


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



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

 **View Check In History**

 **Check In Kiosk Barcode Setup**

 **Enroll Check In Fingerprints**

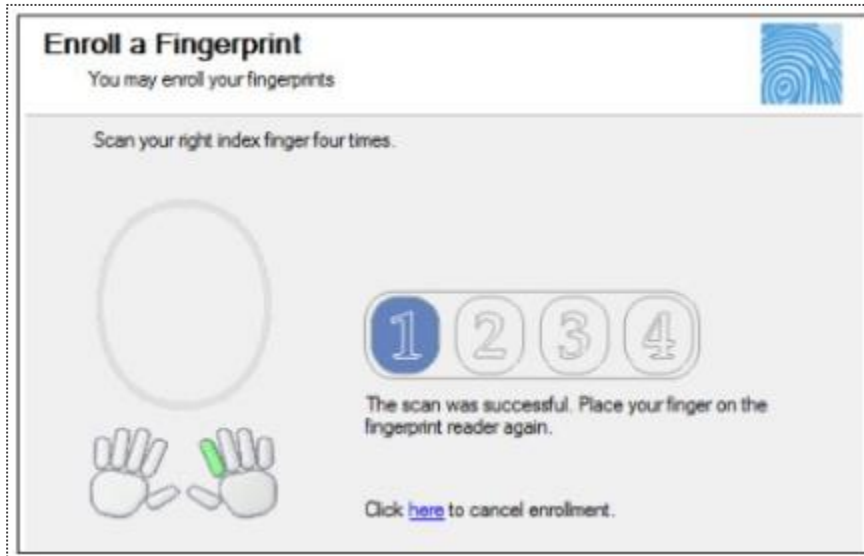
Choose if you are needing to update their barcode or fingerprint. This will be prompted by your Check In Web Kiosk settings under the Setup tab.

Update Barcode/Fingerprint



The screenshot shows a user interface for managing barcodes. It features three main options, each with a barcode icon and a green plus sign:

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



The screenshot shows the **Enroll a Fingerprint** interface. It includes the following elements:

- Title:** Enroll a Fingerprint
- Subtitle:** You may enroll your fingerprints
- Instruction:** Scan your right index finger four times.
- Visuals:** A large empty oval scan window, a fingerprint icon in the top right, and a progress indicator with four numbered circles (1, 2, 3, 4). The first circle is highlighted in blue.
- Feedback:** A message stating "The scan was successful. Place your finger on the fingerprint reader again." and a pair of hands with the right index finger highlighted in green.
- Footer:** A link to "Click [here](#) to cancel enrollment."

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.




Check In Web Kiosk

09:46:50 AM

CLUB  **PILATES**

Client Check In



Please Scan Your Barcode

– OR –

Type Your Barcode And Press Enter


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



Redeem Session Through The Kiosk

Confirm Member Booking Through The Kiosk

09:51:59 AM

CLUB  PILATES

Welcome Mr

You Have The Following Booking Today – Please Confirm

10:00 AM – 11:00 AM Private Session Session (💎 This booking is unpaid)
With Sarah Manager

Confirm

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

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

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

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

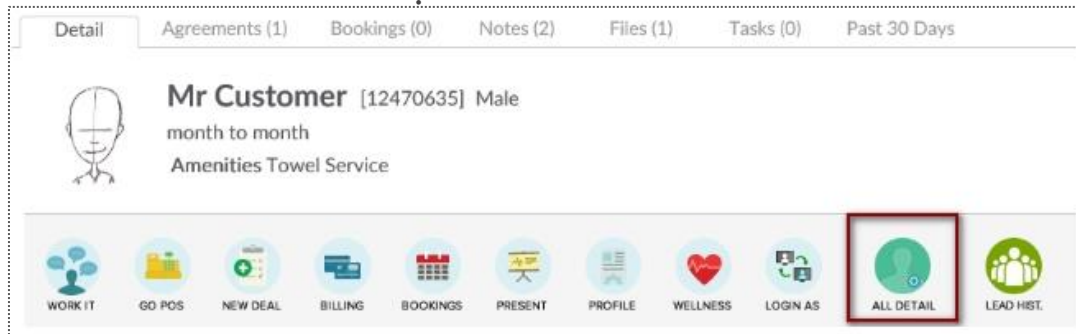
Open Bookings Tab: Bookings not yet completed, or bookings in the past that have not yet been logged to determine their status.

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

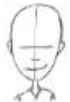
Lost Tab: Paid bookings that were lost due to either the session expiring before it was used, being cancelled outside the allowed cancellation policy for the session, or the customer not showing up for the session.

Completed Tab: Bookings that have been successfully completed

Assign Primary Trainer

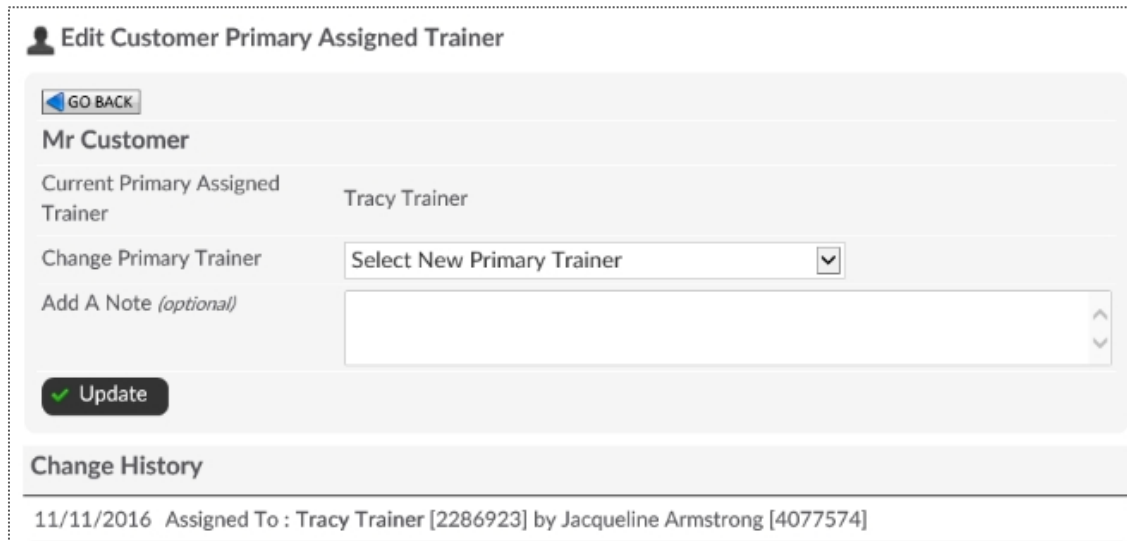



Detail | Agreements (1) | Bookings (0) | Notes (2) | Files (1) | Tasks (0) | Past 30 Days

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

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

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



 **Edit Customer Primary Assigned Trainer**

[GO BACK](#)

Mr Customer

Current Primary Assigned Trainer: Tracy Trainer

Change Primary Trainer:

Add A Note (optional):

Change History

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

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



POS & Inventory

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

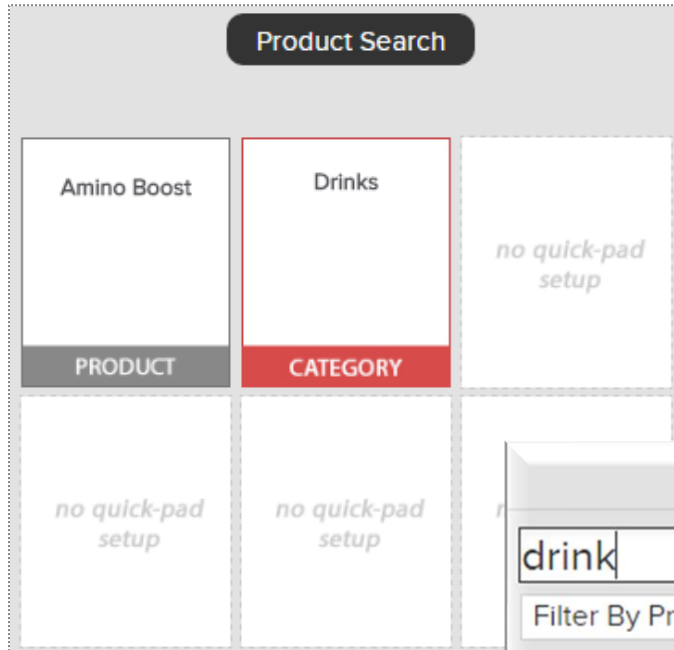
Item	Quantity	Taxable	Price	Extended Price
 Founders Unlimited Monthly Recurring Due 6/15/2018	1	-	\$89.00	\$89.00

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.

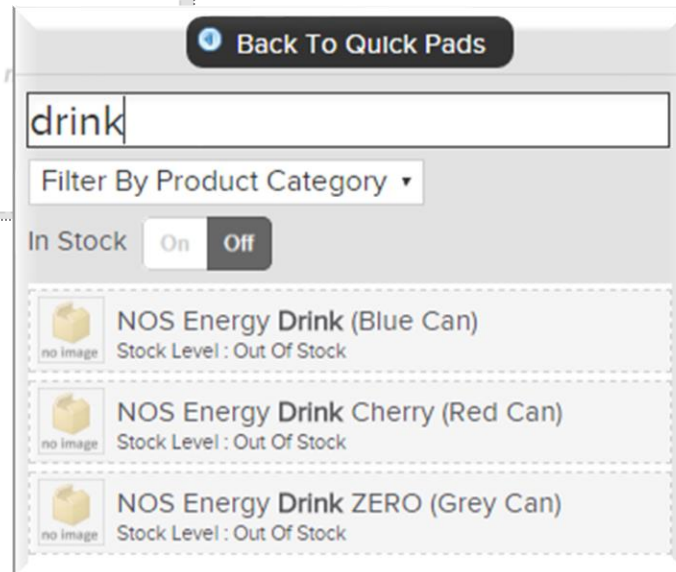
If the client has any invoices that are due, they will automatically populate in the POS shopping cart. You can also access the client's **Future Invoices** to take payment on an invoice not yet due. Any unfinished transactions can be resumed by selecting the **Incomplete Carts** button. Select **Add 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="button" value="Assigned to Current User"/>	<input type="text" value="1"/>	<input type="checkbox"/>	<input type="text" value="15.00"/>	
<input type="button" value="Apply A Product Discount To \$15.00"/> 5% Discount (\$14.25) 10% Discount (\$13.50) 15% Discount (\$12.75) 20% Discount (\$12.00)				
<input type="button" value="Cancel"/>				
<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.

Finalizing the Purchase

Select the appropriate payment method.

BALANCE DUE

\$15.00

 **+ 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  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**

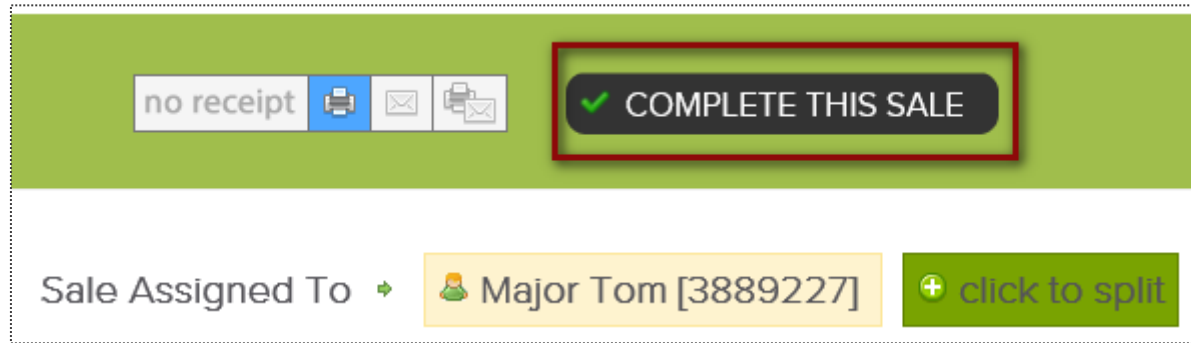
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.




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.

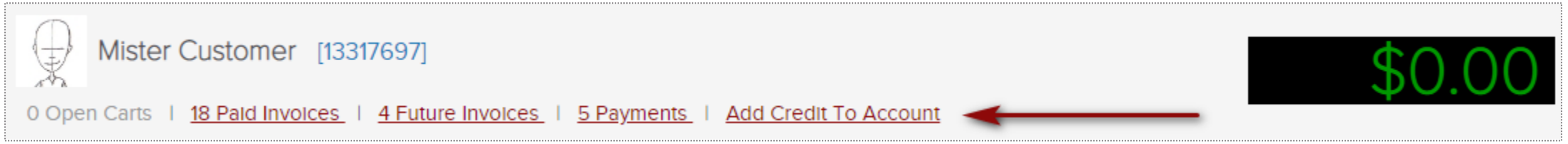
Restricted Card - The customer's bank has declined the transaction as the card has some restrictions.

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.

Point of Sale: Adding Credit on Account

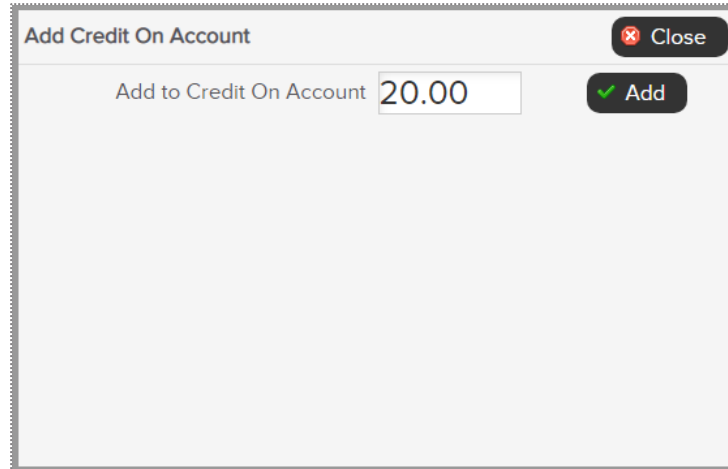
Main > POS



Mister Customer [13317697]

0 Open Carts | [18 Paid Invoices](#) | [4 Future Invoices](#) | [5 Payments](#) | [Add Credit To Account](#)

\$0.00



Add Credit On Account

Add to Credit On Account

Close

Add


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


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

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

Declined Charges Log Report

Reports > Sales > Declined Charges Log

Declined Charges 

All Charges Unique Invoices 

1/1/2018 12/31/2018

Jan 2018 Dec 2018

Mon Tue Wed Thu Fri Sat Sun

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31

Mon Tue Wed Thu Fri Sat Sun

1 2


3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23


24 25 26 27 28 29 30

31

Only Show Automatic (Drafted) Charges 

Excel Export Only

RUN REPORT

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

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

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

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

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

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	InventoryValuc	SetInventoryTo	IncreaseInventoryBy	DecreaseInventoryBy
4	121835	SKU121835		\$25 Gift Card	98	\$0.00			
5	101760	SKU18957		12oz Water	-26	\$0.00			
6	120105	SKU120105		Coconut Water	29	\$0.00			
7	101767	SKU23751		Credit on Account	50	\$0.00			
8	101773	SKU21484		Jamocha Xtra Protein Smoothie	-2	\$0.00			
9	101774	SKU19006		Mens TShirt Black	-28	\$0.00			
10	145815	SKU145815		Red Cheeks Tanning Lotion	-1	\$0.00			
11	31636	SKU31636		Water - corp	-1	\$0.00			

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

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

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

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

Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory

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

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

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

Some key points before you upload

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

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

Choose File

No file chosen

Upload CSV File

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

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

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

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



Schedule Management

Day List




Bookings > Day List > All

Friday, August 17, 2018 Hide The Past

All (3) Consults (0) Services (0) Classes Include photos in PDF

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

Marissa Mister Jon

 Acosta  Customer  Customer

1st ←

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

No Instructor

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

17

AUG 2018

Aug 2018

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

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

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








Day List


Bookings > Day List > Classes

Friday, August 17, 2018

All (3) Consults (0) Services (0) **Classes** Include photos in PDF

Filter By Name Filter by Status All

 3:30 PM : Endurance (75 Mins) - (48 Open Spaces)  <input type="button" value="+ Make Booking"/>	
 Jon Customer <input type="button" value="WORK IT"/>	 Bryan Frisina <input type="button" value="Show"/> <input type="button" value="No Show"/>
 Marissa Acosta <input type="button" value="WORK IT"/>	<input type="button" value="Show"/> <input type="button" value="No Show"/>
 Mister Customer <input type="button" value="WORK IT"/>	 Timmy CycleStar <input type="button" value="Show"/> <input type="button" value="No Show"/>

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

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

Classes: Add a Class to the Schedule

Bookings > Classes

TIME / DATE	MON JAN 22	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	 MON JAN 22	 TUE JAN 23
6:00 AM	<div style="border: 2px solid red; padding: 2px;"> 50 Classic (60 Mins) 6:00 AM - 7:00 AM Demo L </div>	<div style="border: 2px solid yellow; padding: 2px;"> 50 Classic (60 Mins) 6:00 AM - 7:00 AM Demo L </div>
8:00 AM		
9:00 AM	<div style="border: 2px solid purple; padding: 2px;"> 50 Connect (45 Mins) 9:00 AM - 9:45 AM No Instructor </div>	

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

MON JAN 22nd ✕

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

Book This For

Mr Customer -

i 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

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: Adding Credits to Account


Member Account > Bookings

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

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

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

To access this screen search and select the desired client.

 Customer Booking Overview

[GO BACK](#)

Mister Customer

Session Credits (5) | Open Bookings (0) | Cancelled Ok (0) | Lost (2) | Completed (17)



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

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


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


Grid View: Schedule a Service

Bookings > Grid View


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

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

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


 organize	FRONTDESK FELICITY Front Desk Staff	Tracy Trainer Trainer
Time		
7:00 AM		
8:00 AM		

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		


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



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





















 Personal Training 30 Mins Booking #40329770

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

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


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

Previous 10 Bookings
(mouse over icons for more info)

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

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.


Block Time as Unavailable

Bookings > Grid view

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

MON OCT 31st

8:00 AM
Tracy Trainer

 Block Out Some Time

How Long ?


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


- 15 mins (8:00 AM - 8:15 AM)
- 30 mins (8:00 AM - 8:30 AM)**
- 45 mins (8:00 AM - 8:45 AM)
- 1 hr (8:00 AM - 9:00 AM)
- 1 hr 15 mins (8:00 AM - 9:15 AM)

Add Optional Detail

Add Comment Here

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

 Make Unavailable

 Back

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

My Logged Session History

11/1/2016

Nov 2016

Sun Mon Tue Wed Thu Fri Sat

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

11/30/2016

Nov 2016

Sun Mon Tue Wed Thu Fri Sat

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

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

[Generate Report](#)

0 Sessions, 2 Classes [export](#)

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


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



Staff Management

Your Login: Profile

Updating your profile and availability

 Update My Profile

My Profile My Availability My Notify Settings My Photo

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

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

Login Information

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

[Click To Update Your Profile](#)

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

Your Login: Availability

Updating your profile and availability

My Standard Weekly Availability

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

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

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

Copy Sun Mon Tue Wed Thu Fri Sat Copy Clear All

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

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

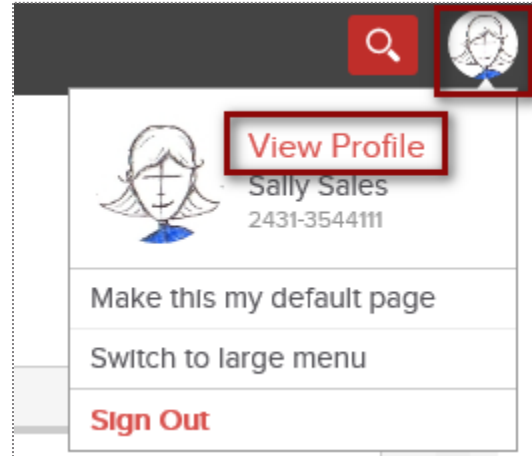
Copy - You can copy the available time from one day to another using this tool.

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

Clear All - will remove all available times.

Your Login

Updating your profile and availability



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



Setup Staff Clock In/Out Barcode

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

Timmy CycleStar (23965138)

Lead CycleStar [view permissions](#)

Setup for scheduling? Yes: 0 future bookings

timmy@cyclebar.com

no cell phone entered

no home phone entered

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

Employee Time Clock Barcode

[GO BACK](#)

Timmy CycleStar

[Delete The Current Barcode - 4321](#)

[Update](#)

[Generate And Assign A Barcode](#)






[Scan And Assign An Existing Barcode](#)

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

Setup Staff Hourly Pay Rate

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

Administrative

-  [Access Their Login Area](#)
-  [Edit Profile](#)
-  [Disciplinary History & Entry](#)
-  [Time Clock Barcode](#)
-  [Time Clock Pay Rate](#)

Employee Time Clock Pay Rate

[GO BACK](#)

Frontdesk Felicity

Time Clock Pay Rate \$ /hr


[Update](#)

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


Check In Web Kiosk

Setup > General > Check In Web Kiosk

09:46:50 AM

CLUB  PILATES

Client Check In


43864 065100

Please Scan Your Barcode

– OR –

Type Your Barcode And Press Enter

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

04:37:44 PM

Mister Manager [20168170]
General Manager




CURRENTLY CLOCKED IN

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

Time Clock Report

Reports > Staff > Time Clock Payroll

Time Clock Payroll 

7/1/2019

Jul 2019

Sun Mon Tue Wed Thu Fri Sat

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

7/31/2019

Jul 2019

Sun Mon Tue Wed Thu Fri Sat

1 2 3 4 5 6

7 8 9 10 11 12 13

14 15 16 17 18 19 20

21 22 23 24 25 26 27

28 29 30 31

Preset Date Ranges

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

Exclude Employees with No Hours

Include Deleted Staff

RUN REPORT

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

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

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

User ID	Employee Name	Home Location	Clocked Hours	Clocked Mins	Total Minutes	Pay Rate	Total Pay
4670167	Charlie Clubowner	CRTraining Membership Site	29	32	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

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



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>

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


Training: ClubReady Foundations Webinar

Learn > Training



ClubReady Foundations for Staff Members (Simulated)

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


Wed, Oct 21, 2020 9:00 AM - 10:30 AM CDT 

[Show in My Time Zone](#)

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

This includes:

- Prospect Management
- Work It
- Agreement Write Up
- Scheduling



*Required field

First Name*

Last Name*

Email Address*

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

Register

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

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:

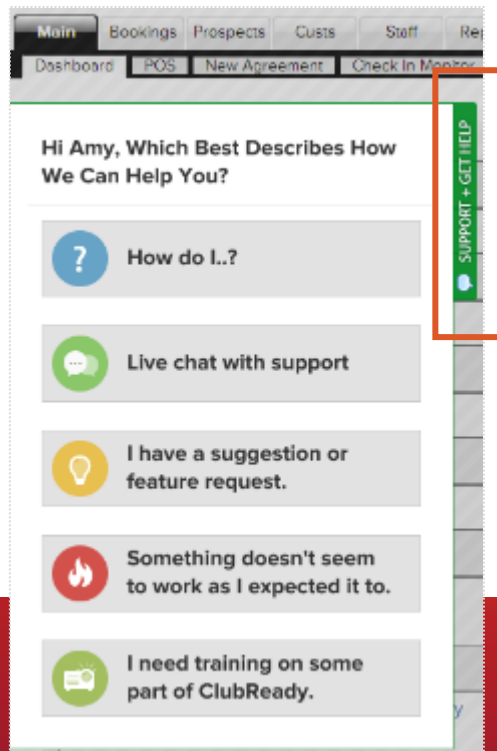
<https://www.clubready.com/wiki/WK31458733558>

Video - Managing Tasks And Using Work It Recorded Webinar:

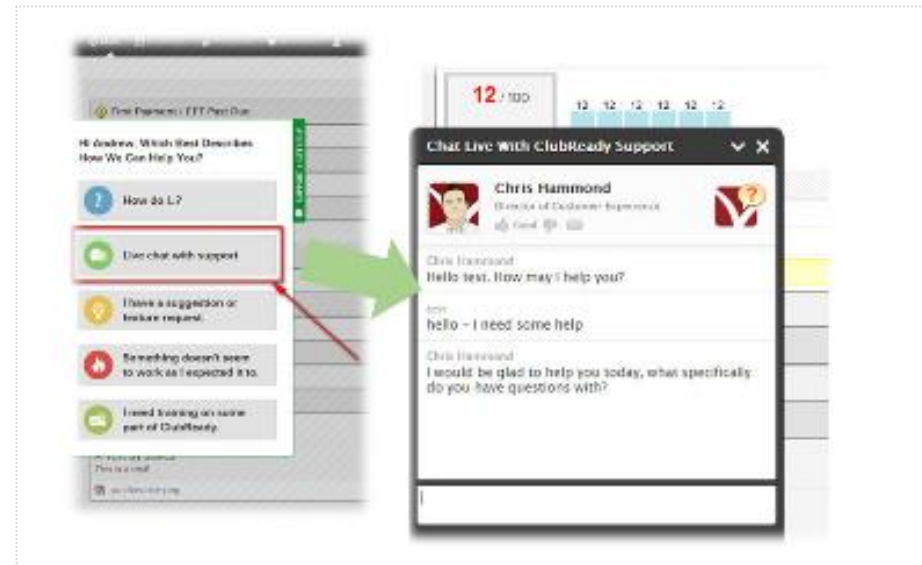
<https://www.clubready.com/wiki/WK27972088386>

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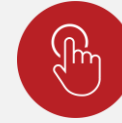


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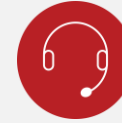
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