



9Round

Intro User Guide

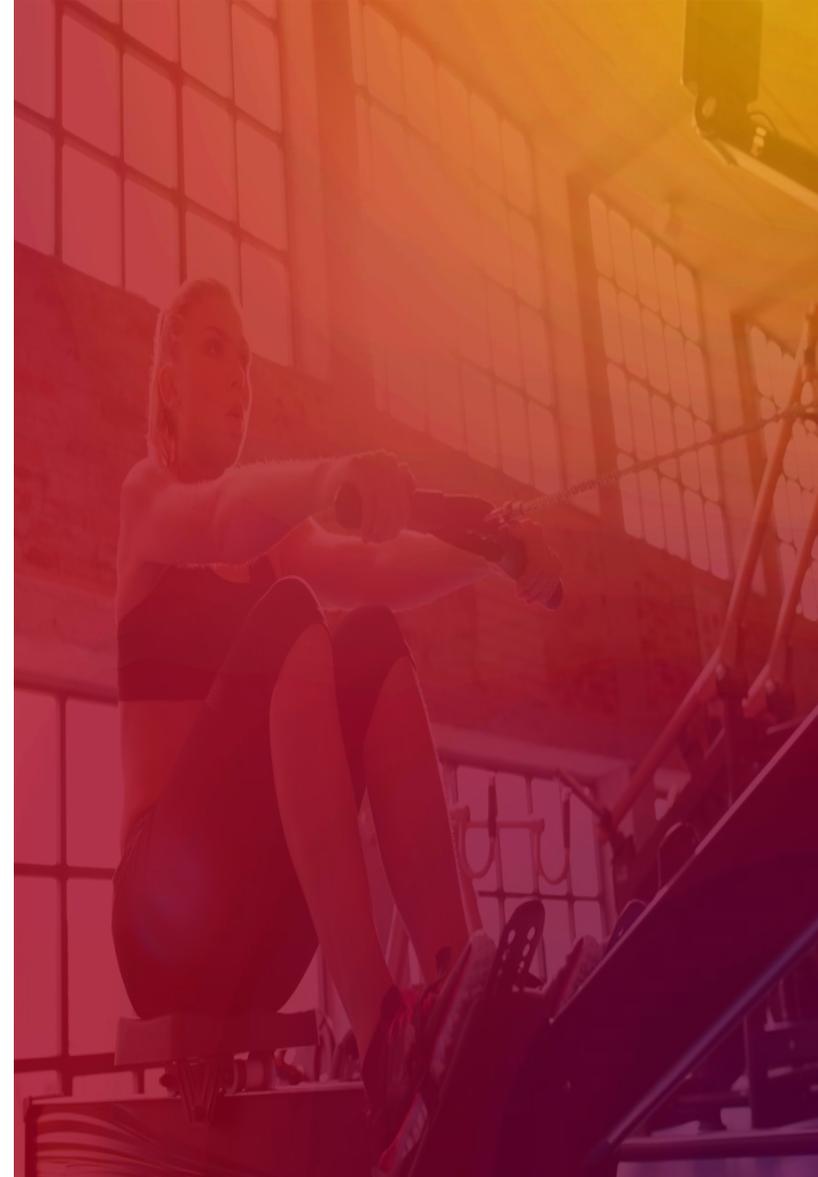
9Round Demo

- 9Round Demo Site
- www.9rounddemo.clubready.com
 - Username: 9roundmanager
 - Password: password

Recommended Hardware

<https://clubready.zendesk.com/hc/en-us/articles/360042090312-Recommended-Hardware>

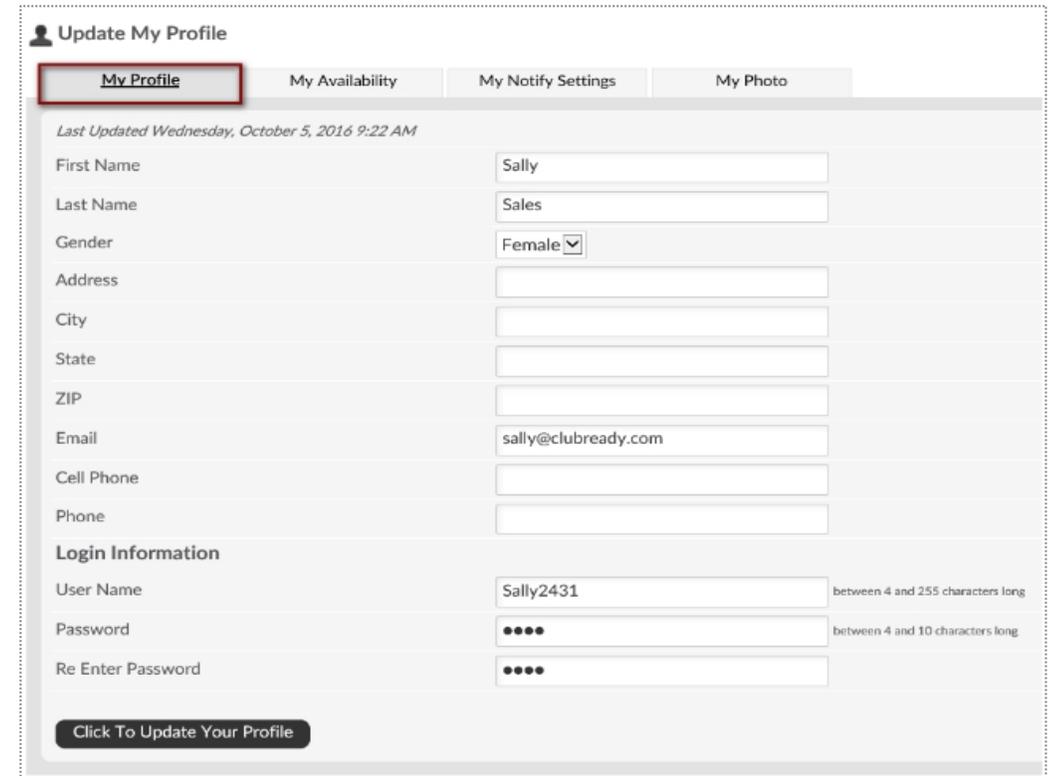
After the units have been received and setup in place please email support@clubready.com to schedule a remote computer setup session.



Employee Profile



Log into your site. In the top-right corner click on the drop down menu. Select option **Edit My Profile**



Update My Profile

My Profile | My Availability | My Notify Settings | My Photo

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

First Name: Sally

Last Name: Sales

Gender: Female

Address:

City:

State:

ZIP:

Email: sally@clubready.com

Cell Phone:

Phone:

Login Information

User Name: Sally2431 (between 4 and 255 characters long)

Password: (between 4 and 10 characters long)

Re Enter Password:

Click To Update Your Profile

From the Profile screen you can update your information. Entering your email is important for notifications from ClubReady. The login section will allow you to change your username and password.

Entering a Prospect

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

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

Gender REQ	<input type="radio"/> Male <input type="radio"/> Female
<input checked="" type="checkbox"/> include in duplicate search	
First Name REQ	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Last Name REQ	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Email Address (important) REQ	<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 REQ	Select A Prospect Type <input type="button" value="v"/>
<input checked="" type="checkbox"/> Email Is Sent?	<input checked="" type="checkbox"/> Yes - New Prospect Email email template is used info about this
ClubReady Login Available? REQ	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.



Presentations

Prospects/Members > Prospect/Member Detail > PRESENT

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

 **Young Adams** [18030401] Female 56 years old

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

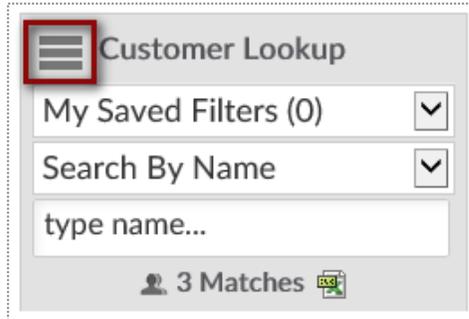
Available Presentations [close](#)

[9Round Adult Waiver \(4 steps\)](#)

[9Round Minor Waiver \(4 steps\)](#)

A list of available presentations will display for the selected prospect/member. Choose the correct presentation to walk through with the client and have them complete the form.

Email Blasts



Customer Lookup

My Saved Filters (0) ▼

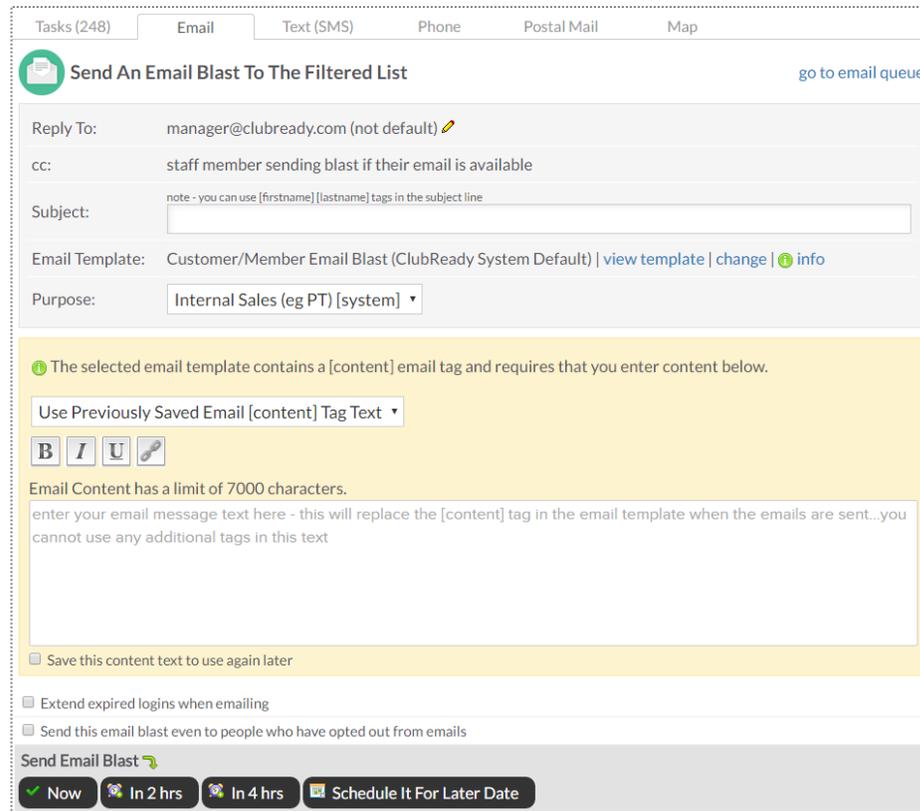
Search By Name ▼

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

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:

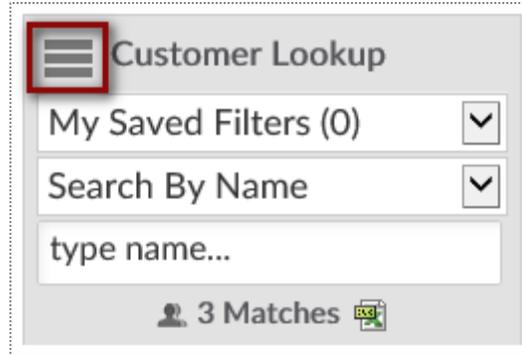
Save this content text to use again later - If you are going to send this out on a regular basis.

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

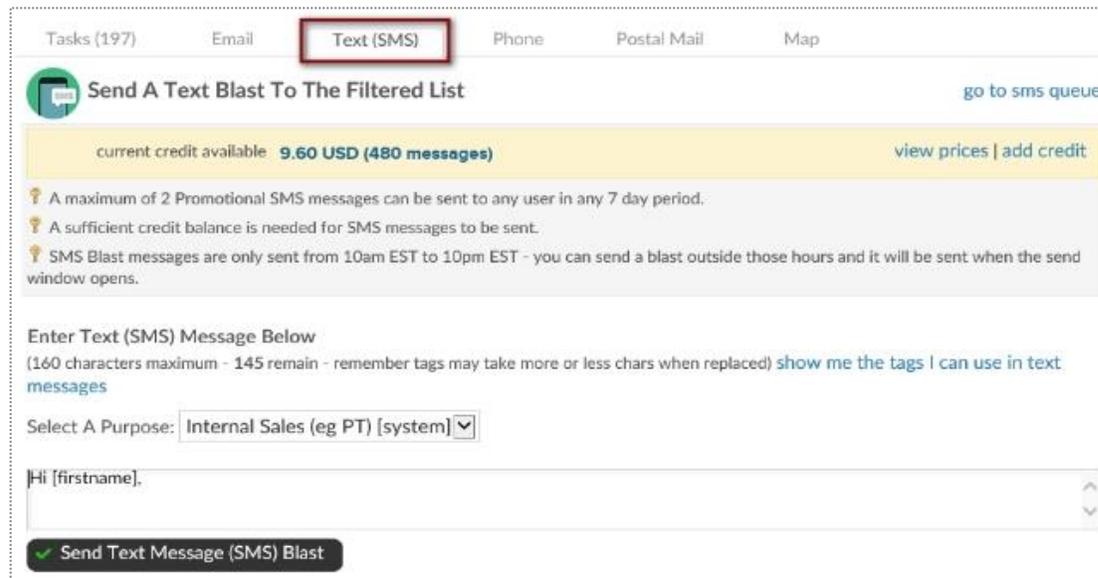
Prospects/Members > Text (SMS)



A dropdown menu titled "Customer Lookup" with a red box around the three-bar icon. 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 message 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 "Text (SMS)" tab is selected in the navigation bar. The main heading is "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)" and "view prices | add credit". Three informational messages are listed below. The "Enter Text (SMS) Message Below" section includes character limits and a link to "show me the tags I can use in text messages". A "Select A Purpose:" dropdown is set to "Internal Sales (eg PT) [system]". A text input field contains "Hi [firstname]". A "Send Text Message (SMS) Blast" button is at the bottom.

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



Grid View: Schedule a First Time Workout

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
mrcustomer@clubready.com

Send A Text Message ⚠ No Cell Phone

Optional Internal Note (Mr will not see it)

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.



Grid View: Cancel a Booking

Bookings > Grid View

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

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

Mr Customer [ID 2311063] WORK IT
 Personal Training 30 Mins Booking #40329770
Thursday, January 5, 2017 8:00 AM with Tracy Trainer
 This session finished 5 hrs ago - has not yet been logged

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

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

Mr Customer wants to cancel (loses session credit)
 Cancellation is not Mr Customer's fault (does not lose session credit)

Notification
 Send An Email To

 Send A Text Message (requires credits)

Optional Internal Note

[Cancel This Booking](#)

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

Grid View: Reschedule a Service Booking

Bookings > Grid View

 organize	FRONTDESK FELICITY Front Desk Staff	Tracy Trainer Trainer
Time		
7:00 AM		
8:00 AM		<div style="border: 2px solid red; background-color: yellow; padding: 2px;">M.Customer Personal Training</div>

Select the session you wish to reschedule 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](#)

Only show times that match your rules for Personal Training - (on the hour, half-hour)

Only show times with Tracy Trainer (un-select to also show possible times with other staff members)

Availability Not available

Find An Available Time On Friday, January 6

Morning	Afternoon	Evening
<input checked="" type="checkbox"/> 6:00 AM Tracy Trainer	<input checked="" type="checkbox"/> 12:30 PM Tracy Trainer	<input checked="" type="checkbox"/> 5:30 PM Tracy Trainer
<input checked="" type="checkbox"/> 6:30 AM Tracy Trainer	<input checked="" type="checkbox"/> 1:00 PM Tracy Trainer	<input checked="" type="checkbox"/> 6:00 PM Tracy Trainer
<input checked="" type="checkbox"/> 7:00 AM Tracy Trainer	<input checked="" type="checkbox"/> 1:30 PM Tracy Trainer	<input checked="" type="checkbox"/> 6:30 PM Tracy Trainer
<input checked="" type="checkbox"/> 7:30 AM Tracy Trainer	<input checked="" type="checkbox"/> 2:00 PM Tracy Trainer	<input checked="" type="checkbox"/> 7:00 PM Tracy Trainer
<input checked="" type="checkbox"/> 8:00 AM Tracy Trainer	<input checked="" type="checkbox"/> 2:30 PM Tracy Trainer	<input checked="" type="checkbox"/> 7:30 PM Tracy Trainer

Choose a date that you would like to reschedule to. Select if you want to email or text the customer. After you hit the **Reschedule** button your booking will now be rescheduled!



Writing an Agreement

Main > New Agreement > Select Person > Confirm

Write Up A New Agreement At Training Team Sandbox

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

Mr Customer

Before Proceeding To The Agreement Selection Please Confirm Their Details

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

Confirm

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



Writing an Agreement

Select Plan > Adjust Pricing & Pay Dates > Save and Go to Step 2

Write Up A New Agreement For Mister Customer [18525094]

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

Champion VIP (\$58.00)
[choose a different sales package](#) | [go to setup for this sales package](#)

Installation Duration 1 Month

Buyers Name
 Mister Customer

Included Amenities *(click amenity to open description)*
 Always Included: All Club Access

Opportunity Setup

# 1	Down	\$ 58	9/15/2017
-----	------	-------	-----------

Auto-Renew Evergreen explain Yes No (Champion VIP) At \$ 58

Total Price	\$58.00
+ Enrollment Fee <input checked="" type="checkbox"/> not taxed	\$ 548.00
+ Processing Fee <input checked="" type="checkbox"/> not taxed	\$ 0.00
+ Last Month's Dues <input checked="" type="checkbox"/> not taxed	\$ 58.00
Subtotal	\$664.00
Sales Tax	\$0.00
Account Credit Balance	\$0.00
Total Due Today <input checked="" type="checkbox"/>	\$664.00 <input type="checkbox"/> PTP Option

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

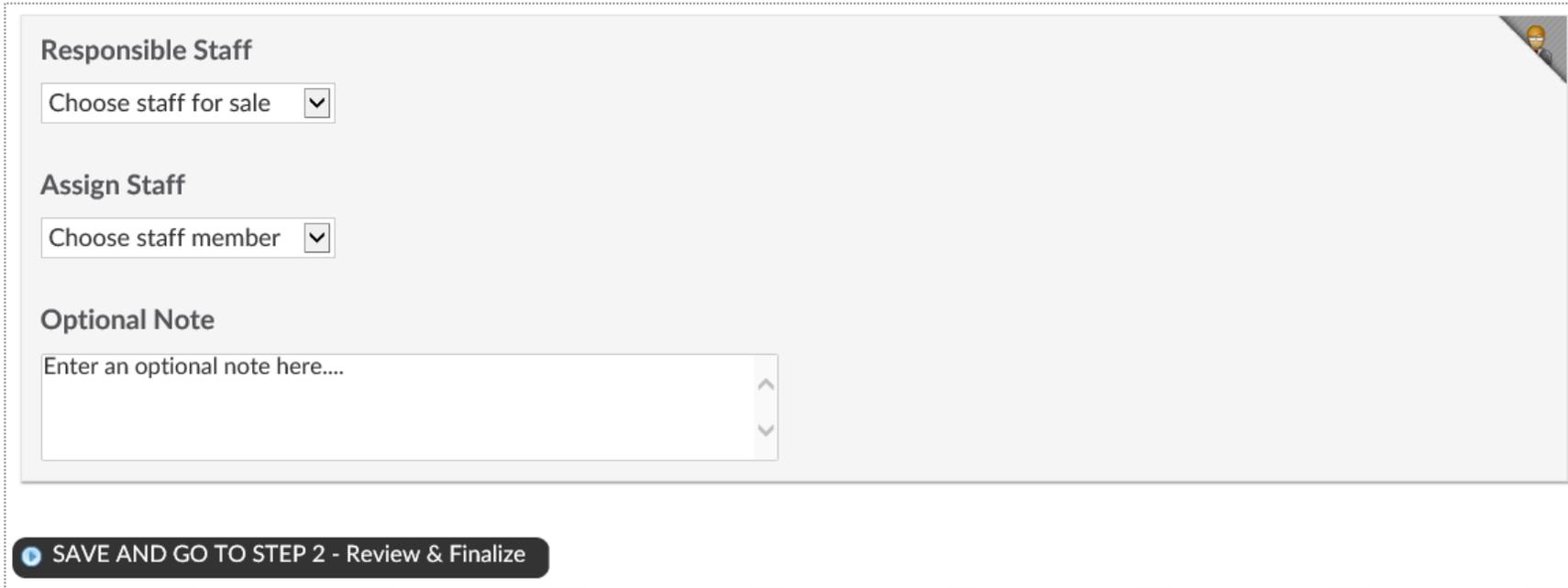
Opportunity Setup - Shows initial planned payments and their due dates. You have the option to adjust both the amount coming due and their due dates.

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.

Writing an Agreement

Assigning Sales Commission & Member Contact



The screenshot shows a web form with three main sections: 'Responsible Staff', 'Assign Staff', and 'Optional Note'. Below the form is a dark button with a blue circular icon and the text 'SAVE AND GO TO STEP 2 - Review & Finalize'.

Responsible Staff
Choose staff for sale

Assign Staff
Choose staff member

Optional Note
Enter an optional note here....



 SAVE AND GO TO STEP 2 - Review & Finalize

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

Writing an Agreement

Review Terms > Take Signatures

Step 1  Agreement Setup

Step 2  Review & Finalize

Step 3 Complete

 **SECURE**

Review [hide review details](#)

- ✓ **Champion VIP**
- ✓ Total initial term price is \$58.00
- ✓ Enrollment Fee: \$548.00 to be paid today
- ✓ Last Month's Dues: \$58.00 to be paid today
- ✓ **Total Down Payment Today \$664.00**

✓ **Installment payment is today for \$58.00**

✓ **Then auto-renew at \$58.00**

✓ **Included Amenities: [All Club Access](#) |**

Agreement

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

 **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 Signature

Review Contract & Take Signatures

View Unsigned Agreement

jump to signature

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

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

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

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

Mr Customer



05/11/2017

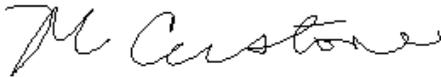
You will take the clients signatures using the **Topaz Signature Pad** or **On-Screen** option.

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

 Electronic Signature 1 of 1

[CLICK TO SKIP THIS SIGNATURE](#)

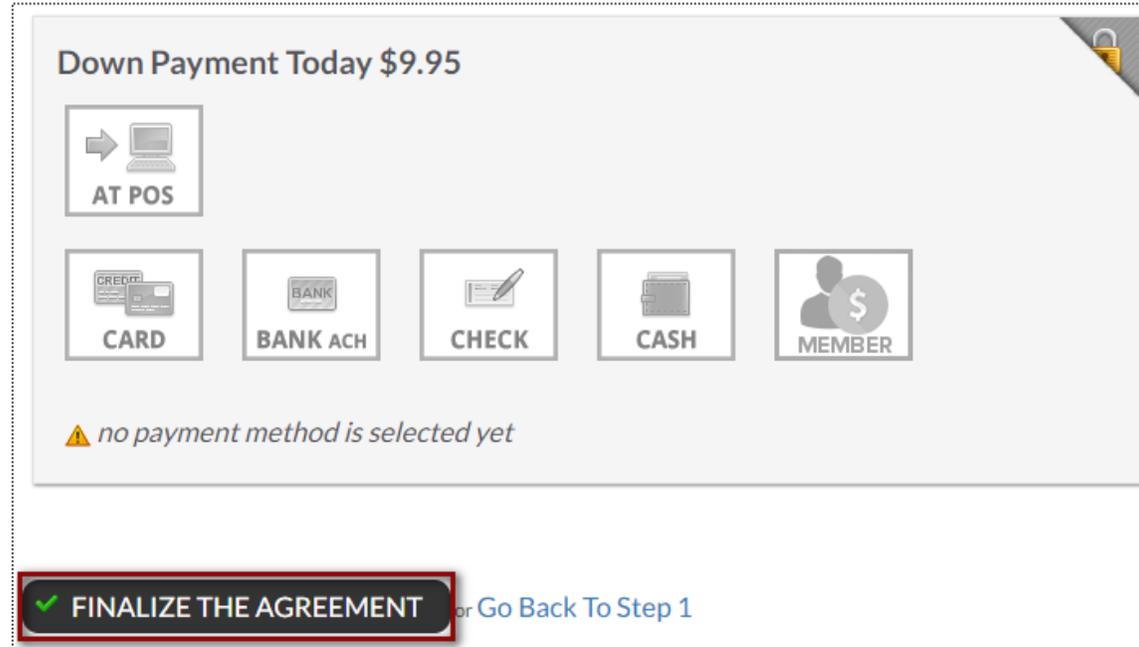
Sign here!



cancel

Writing an 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](#)

Select **AT POS** to take payment from the member. Click on **FINALIZE THE AGREEMENT** to complete the agreement write up process.



POS: Selecting a Product and Checkout

Your selected item will appear in the shopping cart. Click directly on the item to make adjustments, and when ready, select CHECKOUT.

The screenshot displays a POS interface with a 'Product Search' sidebar on the left containing categories like Apparel, Food & Beverages, Other, Parking, Supplements, Uniforms, Donations, Promo, and Misc. The main area shows a customer profile for 'Mister Customer [18525094]', a total of '\$59.36', and a shopping cart table with one item: 'Core Mens Jacket' (Quantity: 1, Price: \$54.95, Taxable: 8.025%). Below the table is a note field and buttons for 'Update' and 'Remove Item'. At the bottom, there are buttons for 'Clear Register', 'Reset All', and a prominent green 'CHECKOUT' button. A summary table on the right shows: Item Total \$54.95, Sub Total \$54.95, Sales Tax \$4.41, and TOTAL \$59.36.

Item	Quantity	Taxable	Price	Extended Price
Core Mens Jacket	1	8.025%	54.95	\$54.95

Item Total	\$54.95
Sub Total	\$54.95
Sales Tax	\$4.41
TOTAL	\$59.36

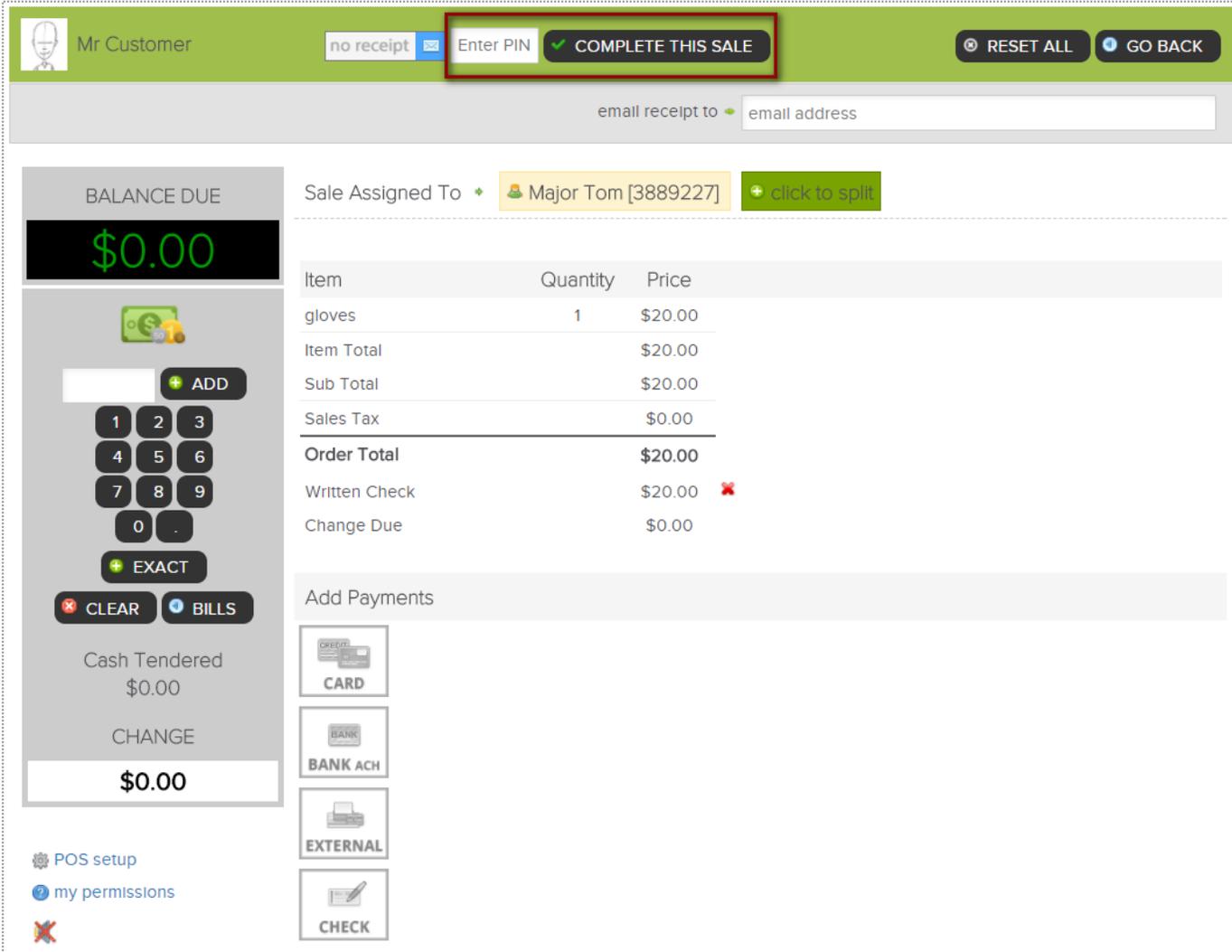
Select the product using the quick pad or performing a **Product Search**. Clicking on the product will place it in the shopping cart.

Adjust from here the amount that is supposed to be collected and add a note, if necessary. Click **Update** to save your changes.

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

Finalizing the Purchase

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



Mr Customer no receipt Enter PIN **COMPLETE THIS SALE** RESET ALL GO BACK

email receipt to email address

Sale Assigned To Major Tom [3889227] click to split

BALANCE DUE
\$0.00

ADD

1 2 3
4 5 6
7 8 9
0 .

EXACT

CLEAR BILLS

Cash Tended
\$0.00

CHANGE
\$0.00

Item	Quantity	Price
gloves	1	\$20.00
Item Total		\$20.00
Sub Total		\$20.00
Sales Tax		\$0.00
Order Total		\$20.00
Written Check		\$20.00 ✖
Change Due		\$0.00

Add Payments

CREDIT CARD

BANK BANK ACH

EXTERNAL

CHECK

POS setup
my permissions

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

If a customer is paying by cash, select the EXACT option or select from the 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.

Enter your staff PIN code and click **COMPLETE THIS SALE**.

Invoice Adjustment

Member > Billing > Invoices > Edit Pencil

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

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

Options For Adjusting This Invoice

Yes No Automatically Draft This Invoice When Due
Note - you can turn off all drafting for this agreement from the summary side-menu option

 Adjust The Invoice Details (Amount or Due Date)
 Cancel The Invoice

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

Amount Due \$	<input type="text" value="9.95"/>
	<input type="text" value="No Sales Taxes"/> \$ <input type="text"/>
Due Date	<input type="text" value="6/4/2017"/>

Change Package Type

Optional Note

or

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.



Cancel an Invoice

Member Account > Billing > Invoices > Edit Pencil
> Billing > Invoices > Edit Pencil

9/3/2017 \$99.00 #77856288 10AM Legacy Membership   ← Due on 9/3/2017 Membership

#67190877 Adjust Invoice For Mr Customer
\$5.00 Month to Month
Due 2/1/2017

Options For Adjusting This Invoice

Turn Draft Off Automatically Draft This Invoice When Due

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

Adjust The Invoice Details

Cancel The Invoice ←

Action : Cancel Invoice

⚠ Note : Cancelling individual invoices will NOT cancel the agreement & Evergreen invoices will still be created after cancelling future invoices individually . Use agreement adjust/cancel to change the agreement status and cancel multiple invoices / evergreen status

Status of any associated bookings / credits

Past bookings 0

Future bookings 0

Credits 0

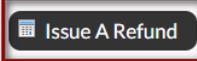
Optional Note

Selecting the option **Cancel The Invoice** will update the screen to display all options for adjusting the invoice. Click the **Cancel This Invoice** button to complete the cancellation.

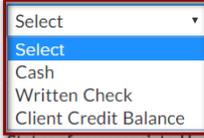
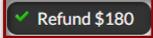
NOTE: Cancelling individual invoices will NOT cancel the agreement or credits, and evergreen invoices will still be created.

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	<input type="checkbox"/>
Partial Refund	<input type="checkbox"/>
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

Due	Amount	Detail	Status
6/9/2017	\$399.00	#78863315 5AM - 10 Week Challenge	✔ Paid - Friday, June 9, 2017 10:42 AM

Once you are on the **Invoices and Payments** 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	Full Details
-----------	---	--	------------------------------

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 checked="" type="radio"/> Yes <input type="radio"/> No to <input type="text" value="mr.customer@email.com"/>
Add An Optional Internal Note	<input type="text"/>
	 This freeze requires a signed freeze agreement
	<input checked="" type="checkbox"/> Implement Agreement Freeze

From this screen you can select the following: **Freeze Type, Start Freeze, Membership Expiration Date and 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
-----------	--------------	--	--------------

- [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 Card on File

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

The screenshot shows a navigation menu with four tabs: Billing, Bookings, General, and Check-in. Below the tabs are several menu items: 'Invoices / Payments / Refunds / Transaction Ledger', 'Agreements (0)', 'Customer Notes (4)', 'Select In Point Of Sale', 'Write Up A New Agreement', and 'Payment Details On File'. The 'Payment Details On File' item is highlighted with a red rectangular border.

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

The screenshot shows the 'Payment Profiles' form. At the top, there are two tabs: 'Credit Card' and 'Bank Account'. The 'Credit Card' tab is selected and highlighted with a red border. The form contains several input fields: 'Name On Credit Card' (with a dropdown menu showing 'Mr Customer'), 'Card Number' (with a 'req' label and icons for MasterCard, VISA, American Express, and Discover), 'Expiration Date' (with a 'req' label and 'MM / YY' format), 'Billing Address' (with fields for Street 1, Street 2, City, and State), and 'Postal Code' (with a 'req' label and a dropdown menu for 'United States'). At the bottom, there are three buttons: 'Add', 'Reset Form', and 'Cancel'.

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

Note: In the event of a hard decline from the CC company/bank, the payment profile will need to be replaced.

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

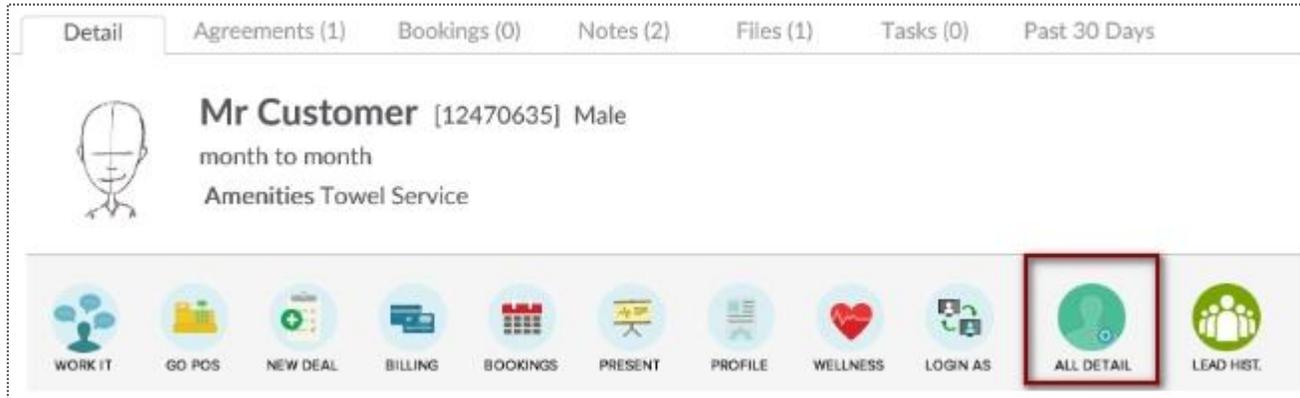
WORK IT | GO POS | NEW DEAL | BILLING | BOOKINGS | PRESENT | **PROFILE** | WELLNESS | LOGIN AS | ALL DETAIL | LEAD HIST.

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, App Login, etc.** To save your changes, click the button **Click to Update**.

Add/Update Check In Barcode

Member Account > All Detail > Check-in

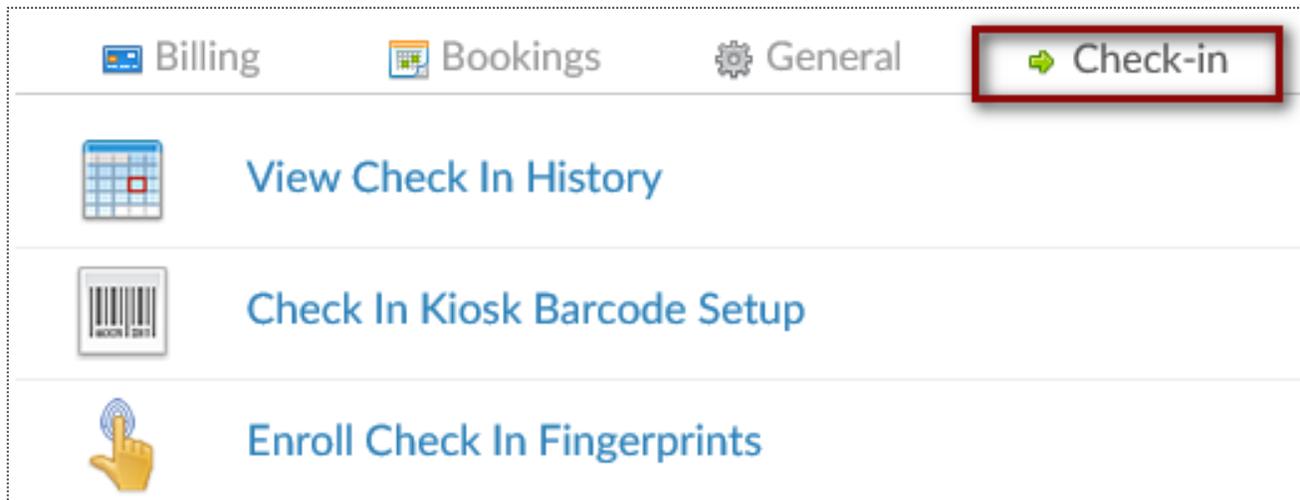


Detail Agreements (1) Bookings (0) Notes (2) Files (1) Tasks (0) Past 30 Days

 **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.



Add/Update Check In Barcode

Member Account > All Detail > Check-in



Manually Enter Barcode

Update



Generate And Assign A Barcode



Scan And Assign An Existing Barcode

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



Adding Staff

Member Account > All Detail > Check-in

Add A New Staff Member: General Details

Gender *	Select	▼				
Date of Birth	Select	▼	Select	▼	Select	▼
Date of Hire	(10) October	▼	7	▼	2016	▼
Select Staff Type	Club Master Admin	▼	⚠ Club Master Admins Have Full System Access			
First Name *	<input type="text"/>					
Last Name *	<input type="text"/>					
Social Security Number	<input type="text"/>					
Address	<input type="text"/>					
City	<input type="text"/>					
State	<input type="text"/>					
ZIP Code	<input type="text"/>					
Cell Phone	<input type="text"/>					
Phone	<input type="text"/>					
Alt Phone	<input type="text"/>					
Email Address	<input type="text"/>					

Emergency Contact Information

Contact Name	<input type="text"/>					
Contact Phone	<input type="text"/>					
Relationship	<input type="text"/> example - Spouse					

ADP Payroll Specific Fields

Company Code	<input type="text"/>	(3 digit code)
File Number	<input type="text"/>	(8 digit code)
Home Department	<input type="text"/>	(8 digit code)

Send Login Details To New Staff Member

Email New Staff Member Their Login Details

Enter the new staff member's information such as **Name**, **Date of Birth**, **Date of Hire**, **Staff Type**, and contact information.



Work It: Contact

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

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

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

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

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

enter details of call.

Internal Sales (eg PT)

Do not add a new call task

Log The Phone Call

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



Work It: Phone Call

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

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

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: Email

The screenshot displays a CRM interface for a contact named "Mr Customer". At the top, there is a profile icon, the name "Mr Customer", and a "No Lead Type" label. Below this are tabs for "Contact", "Sales Scripts", and "Fast Book". On the right, there are buttons for "add task" and "log call". A row of action buttons includes "Make A Phone Call", "Send An Email" (highlighted with a red box), "Send An SMS", and "Person to Person".

The "Send An Email" form contains the following fields:

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

Below the form is a rich text editor with bold (B), italic (I), underline (U), and link icons. The text area contains 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 are tabs for "Past Emails (11)", "Key Note (0)", "All Notes (9)", and "Lead Type History". A "hide misc emails" checkbox is also present. An email history entry is shown with the subject "Thank You For Your Interest In Our Club", a "view" link, and a status of "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 Message)

The screenshot shows a CRM interface for a contact named 'Mr Customer'. The 'Send An SMS' tab is highlighted with a red box. The interface includes a credit balance section showing '9.34 USD' and a 'Send SMS To' button with the number '(123) 456-7890'. A blue message bubble says 'Hello Mr Customer!' and a 'Mark All SMS Read' button is visible.

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

Note: Outgoing text messages have a cost of \$0.02.

Next slide will show how to view incoming text messages.



Widget: Unread Incoming SMS Messages

Main Dashboard

Unread Incoming SMS Messages (2)

All Staff

Tina Belcher WORK IT

Dave Clubready WORK IT

OUT yesterday

Thank you for being such a great customer, Mr Customer!

IN from (314) 456-2095 yesterday

Thanks for being an awesome place to work out!!

Mark All SMS Read

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**.



Work It: Person to Person

The screenshot displays a CRM profile for 'Mr Customer' with a 'No Lead Type' status. The interface includes tabs for 'Contact', 'Sales Scripts', and 'Fast Book', along with an 'add task' button. Action buttons for 'Make A Phone Call', 'Send An Email', and 'Send An SMS' are visible, with the 'Person to Person' button highlighted in a red box. The contact details section shows a cell number of (123) 456-7890, a home number of (123) 456-7890, and a work number listed as 'Unknown'. A dropdown menu for 'Select The Outcome Of The Contact' is set to 'Do not add a new contact task'. A 'Log The Contact' button is present at the bottom left. On the right side, a 'Person to Person' interaction log shows a recent contact with Jacqueline Armstrong on 1/3/2017, with a note: 'talked - positive conversation' and a sticky note saying '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

The screenshot displays a CRM interface for a customer named 'Mr Customer'. At the top, there is a profile icon, the name 'Mr Customer', and a yellow box labeled 'No Lead Type'. To the right, there is a link 'more options for Mr'. Below this, there are three tabs: 'Contact', 'Sales Scripts' (which is highlighted with a red border), and 'Fast Book'. To the right of the tabs are two buttons: '+ add task' and 'log call'. A dropdown menu is open, showing 'Book That Prospect'. Below the dropdown, the script content is displayed in a light gray box:

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?

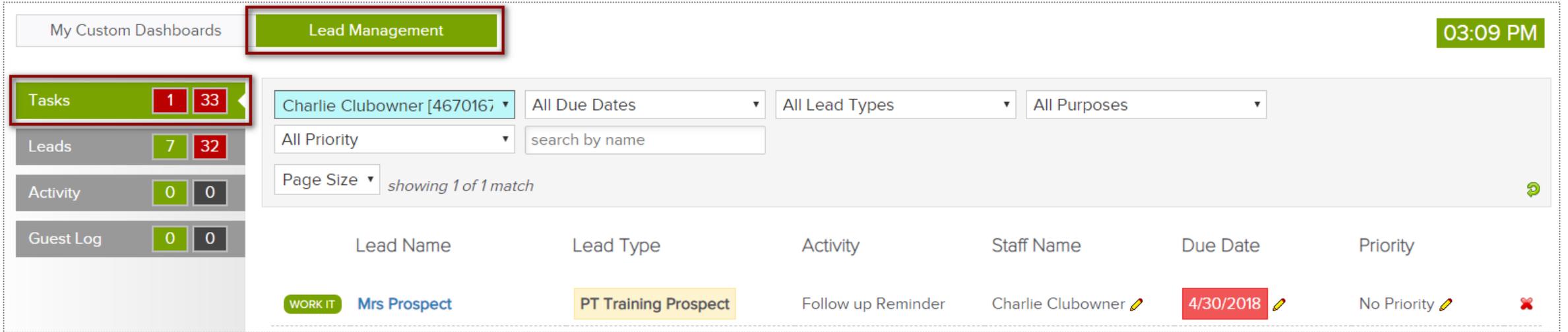
Why don't I book you for some time in the next few days to get you started off on the right foot?

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.

Lead Management Dashboard: Tasks

Main > Dashboard



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

Tasks 1 33

Leads 7 32

Activity 0 0

Guest Log 0 0

Charlie Clubowner [4670167] All Due Dates All Lead Types All Purposes

All Priority search by name

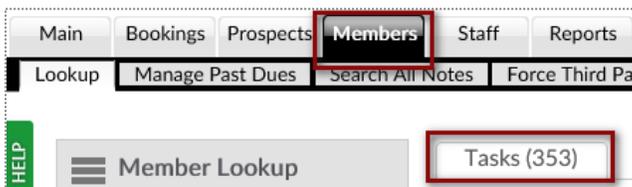
Page Size showing 1 of 1 match

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

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

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

Note: To locate Members tasks, navigate to the **Members** tab in ClubReady and select **Tasks** tab.



Main Bookings Prospects **Members** Staff Reports

Lookup Manage Past Dues Search All Notes Force Third Pa

HELP Member Lookup **Tasks (353)**

Lead Management Dashboard: Activity

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

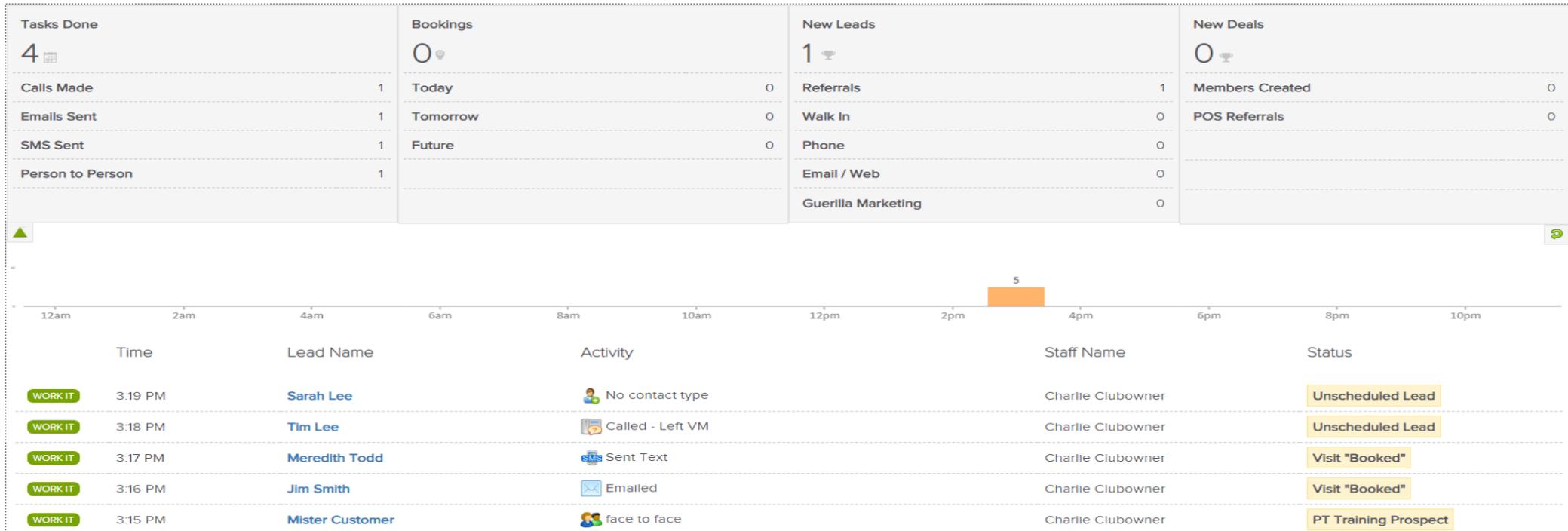
The **Leads** tab will display all of the leads added. The number displayed to the left show leads assigned to the staff member currently logged in. The number displayed to the right show all of the club's leads.

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

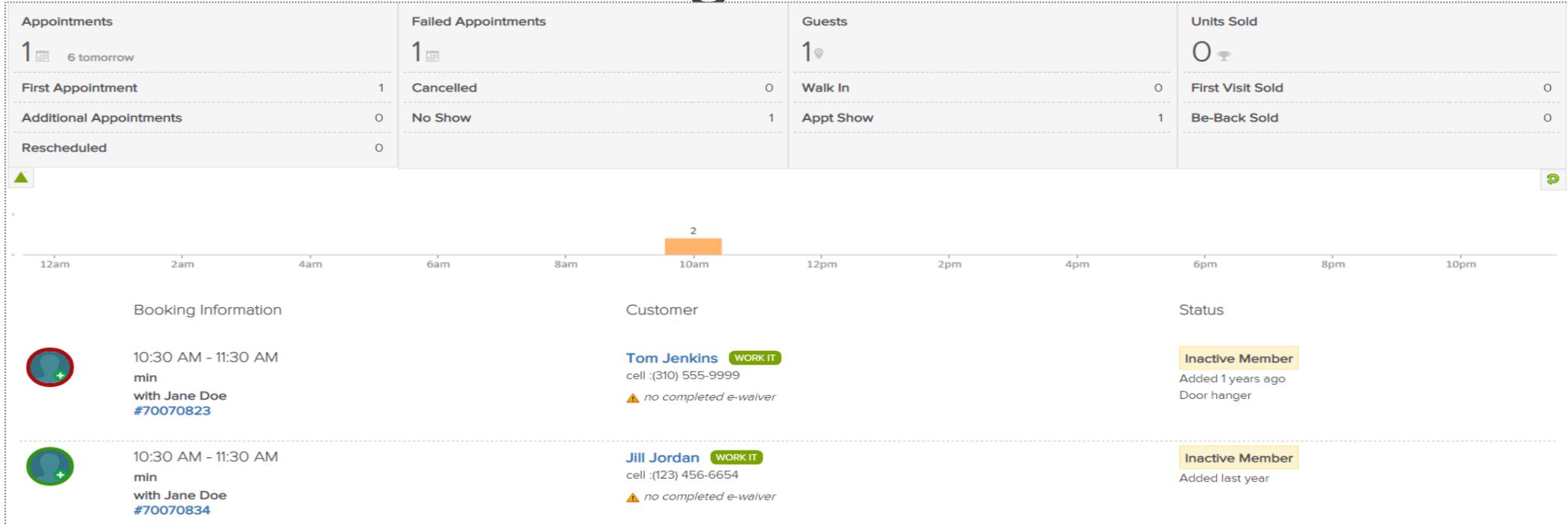


The **Activity** tab reflects current data or activity for a specific day. The report will display **Tasks Done**, **Bookings**, **New Leads** and **New Deals**. A time bar lets you know when are these activities happening throughout your club.



Lead Management Dashboard: Guest

Log > 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.



Additional Resources

If you ever are in a bind, just access these links also under Learn > Knowledge

Change A Members Expiration Date

<https://www.clubready.com/wiki/WK23546050548>

Update a Members Payment Preferences

<https://www.clubready.com/wiki/WK22609266981>

POS Pad Editing

<https://www.clubready.com/wiki/WK19528596374>

Add Products

<https://www.clubready.com/wiki/WK19292042369>

Complete Guide to Employee Time Clock Management

<https://www.clubready.com/wiki/WK23892333951>



Additional Resources: 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>



Additional Resources: Key Reports

Learn > Knowledge

Complete Guide To Product Reports:

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

Complete Guide To Communication Reports:

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

Complete Guide To Misc. Reports:

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

Training: Recorded Training Sessions

Learn > Training

The below training webinars are highly recommended for any 9Round owner. These topics will go into far more depth than the basic class for 9Round owners.

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 – 9Round Basics of ClubReady:

<http://vimeo.com/100509341> (password: 9Round)

Video – ClubReady Foundations for Staff Members:

<https://www.clubready.com/wiki/WK31035704214>

Training: New 9Round Owner Workshop

Learn > Training

Wednesday, August 7, 2019

3:00 PM EST

Corporate Staff

Experience level: New To ClubReady

Chain: 9Round

New 9 Round Owner Workshop (60 mins) Diane Stanzione [view details](#)

The New 9 Round Owner Workshop will cover Basic ClubReady Navigation, How to Make a Presale, Agreement Basics, Presentations, Prospects & Leads, and Staff Management.

maximum attendees 99

webinar URL <https://attendee.gotowebinar.com/rt/4326131141753926659>

dial-in number

access code

 Key Learning 1 Presale

 Key Learning 2 Agreements

 Key Learning 3 Staff

Training: New 9Round Owner Workshop

Learn > Training



New 9 Round Owner Workshop (60 mins)

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

Wed, Aug 7, 2019 2:00 PM - 3:00 PM CDT

[Show in My Time Zone](#)

The New 9 Round Owner Workshop will cover Basic ClubReady Navigation, How to Make a Presale, Agreement Basics, Presentations, Prospects & Leads, and Staff Management.



*Required field

First Name*

Last Name*

Email Address*

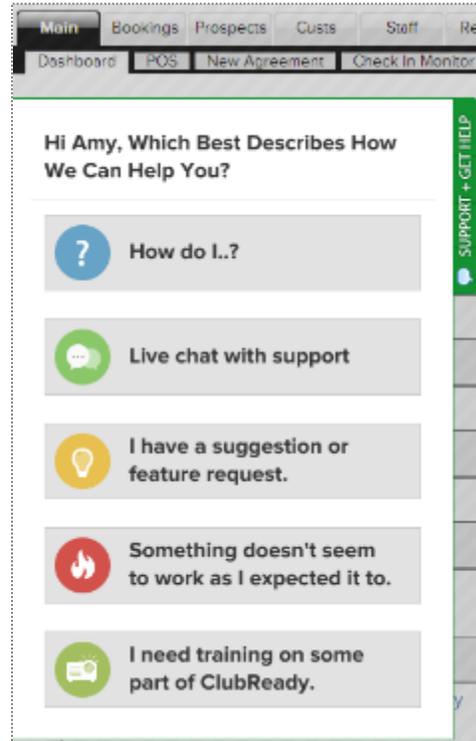
By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

Register

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

Support + Get Help

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



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



You can also reach our support team from 6AM - 9PM CST, Monday – Friday and Saturdays - Sundays 8AM – 5PM CST at 1-855-976-5787.

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For updates on enhancements and ClubReady news follow @ClubReady



Subscribe to receive status notifications on active incidents or upcoming maintenances
<http://status.clubready.com/>

Need Help? Here's How to Get It



Submit a ticket



Post on the Help Forums



Call for help: **1-800-405-4818**



Use Live Chat



Email us for help: support@clubready.com