ClubReady

9Round

Intro User Guide

9Round Demo

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

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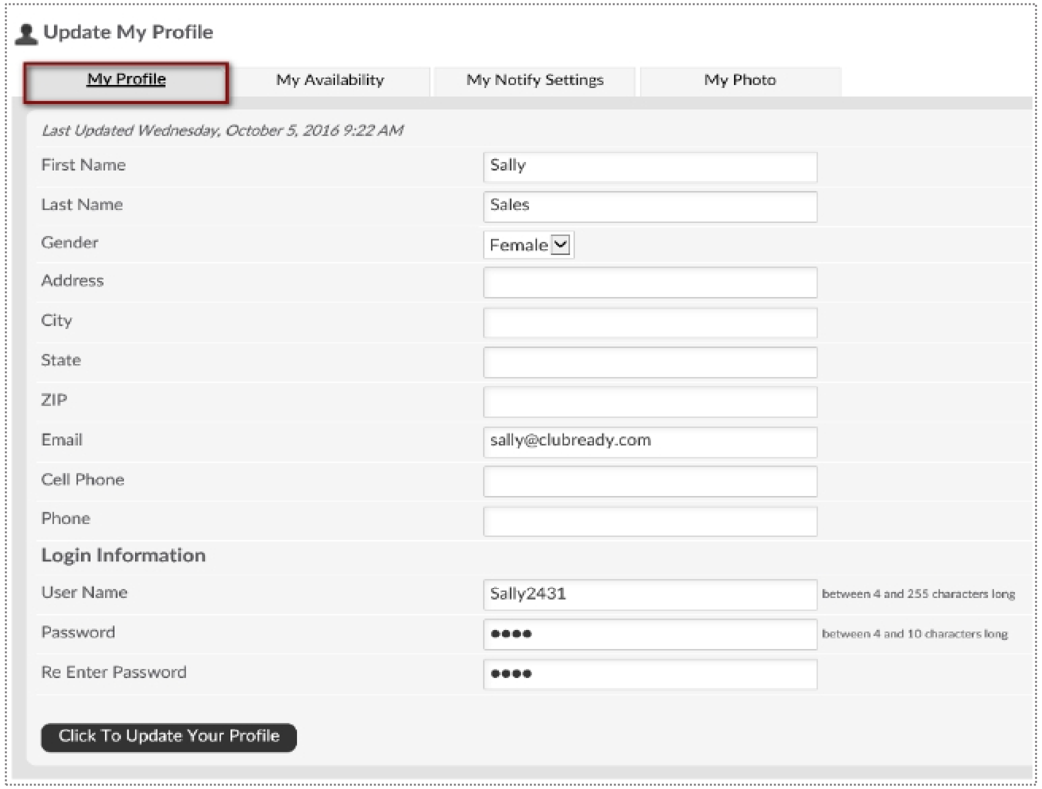
Recommended Hardware

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

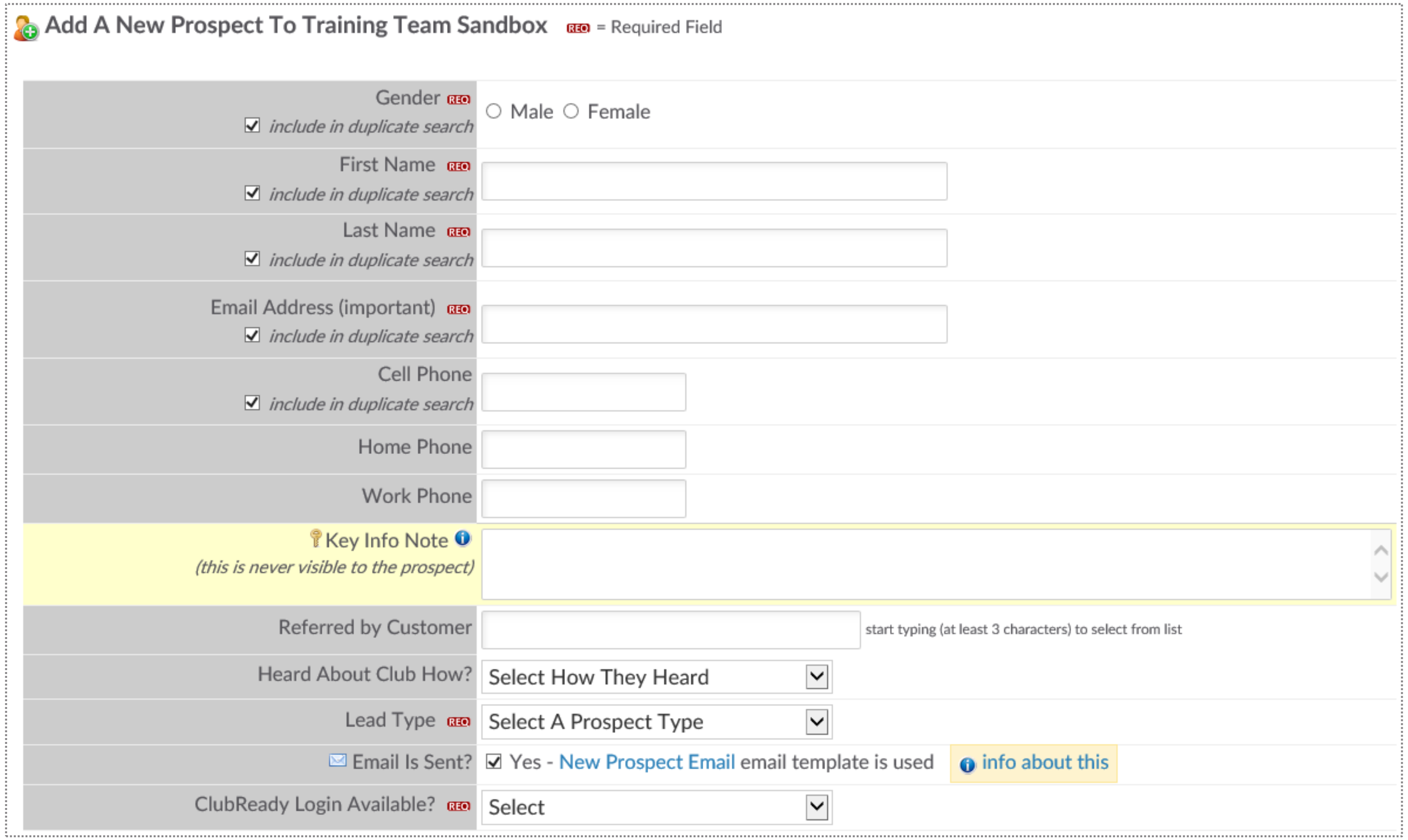
Log into your site. In the top-right corner click on the drop down menu. Select option **Edit My Profile**



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

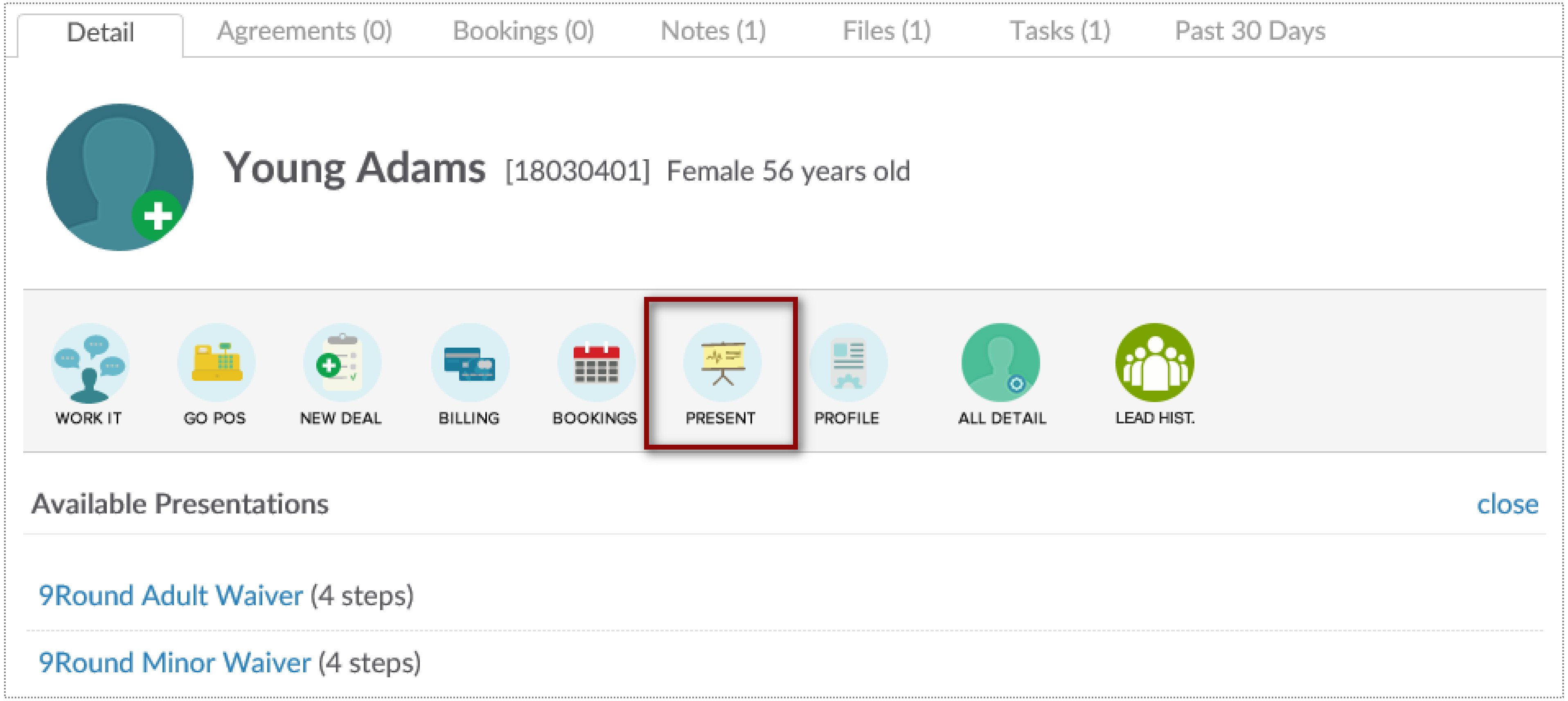

Add A New Prospect To Training Team Sandbox REQ = Required Field

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

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

Presentations

Prospects/Members > Prospect/Member Detail > PRESENT



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.

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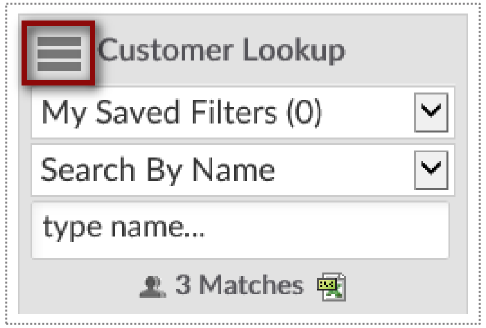
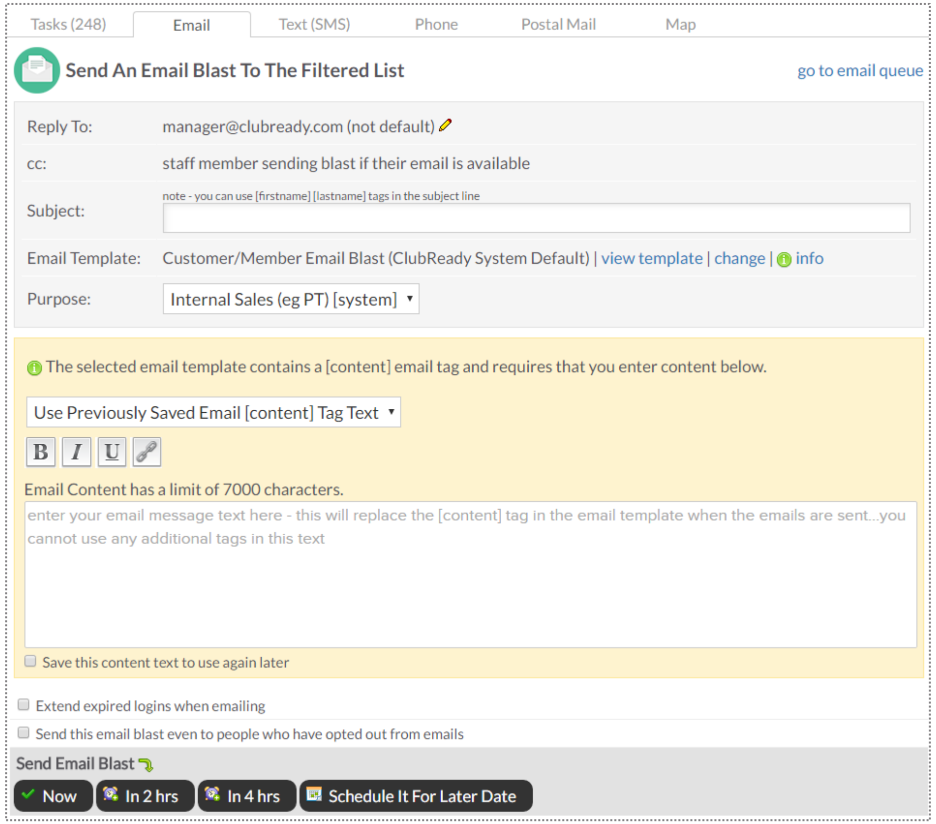
Email Blasts





Prospects/Members > Email

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

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

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

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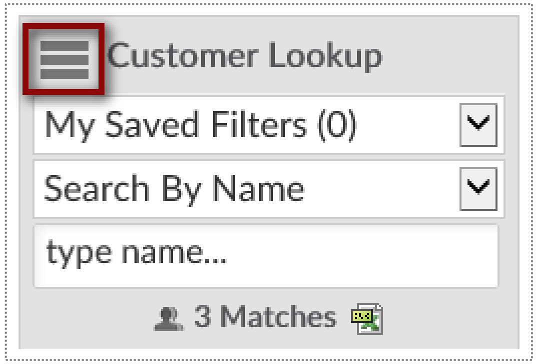
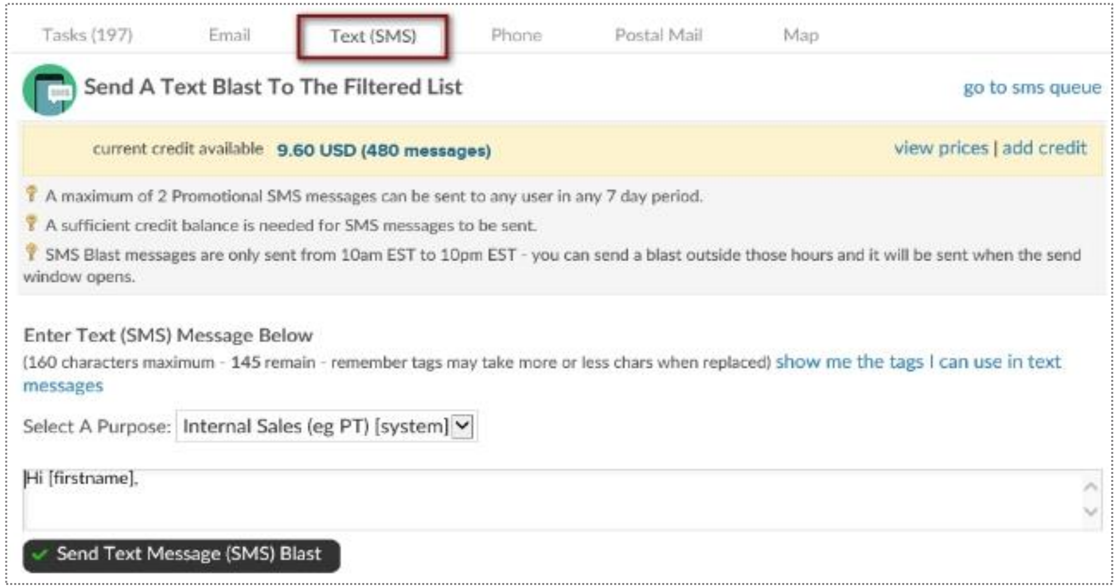
Text Blasts

Prospects/Members > Text (SMS)





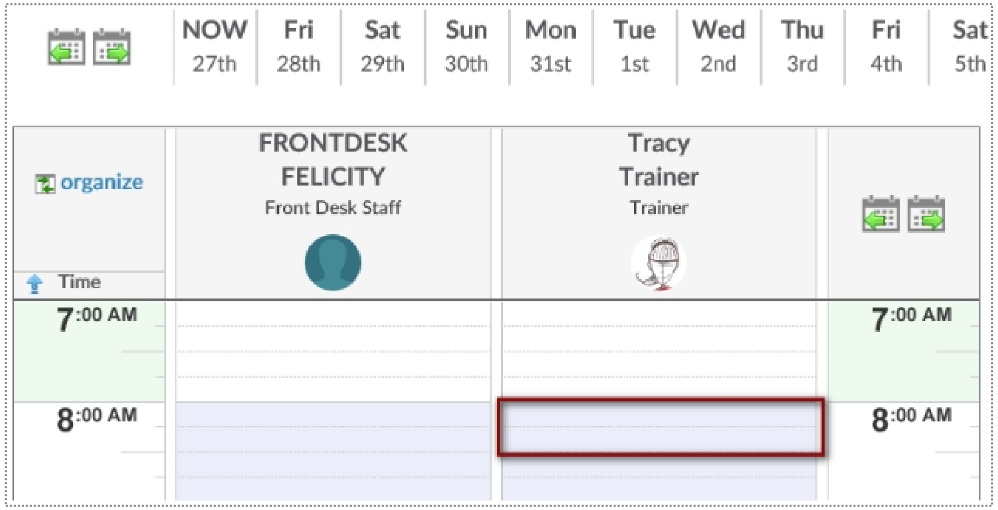
To start narrowing who will receive a text blast, click on the 3 bars. This will provide you with options to narrow the search.

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

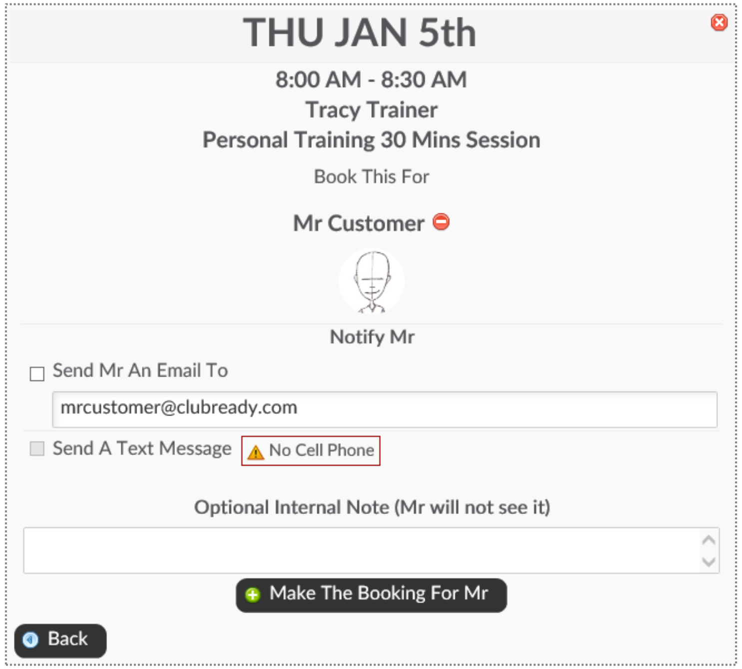
The last section is where you will actually compose the message. Click the button **Send Text Message (SMS) Blast** to start the send process.

Grid View: Schedule a First Time Workout

Bookings > Grid View



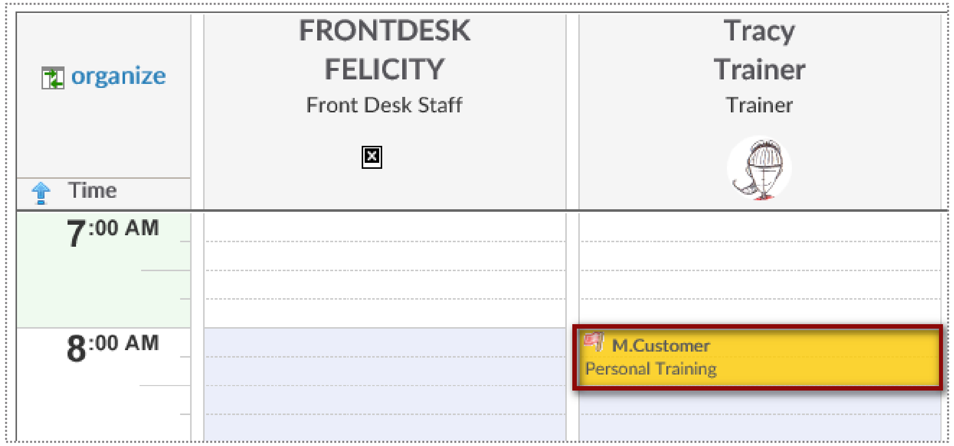
1-on-1 services are scheduled via the Grid View. Select the date and click on the beginning time block under the provider performing the service.

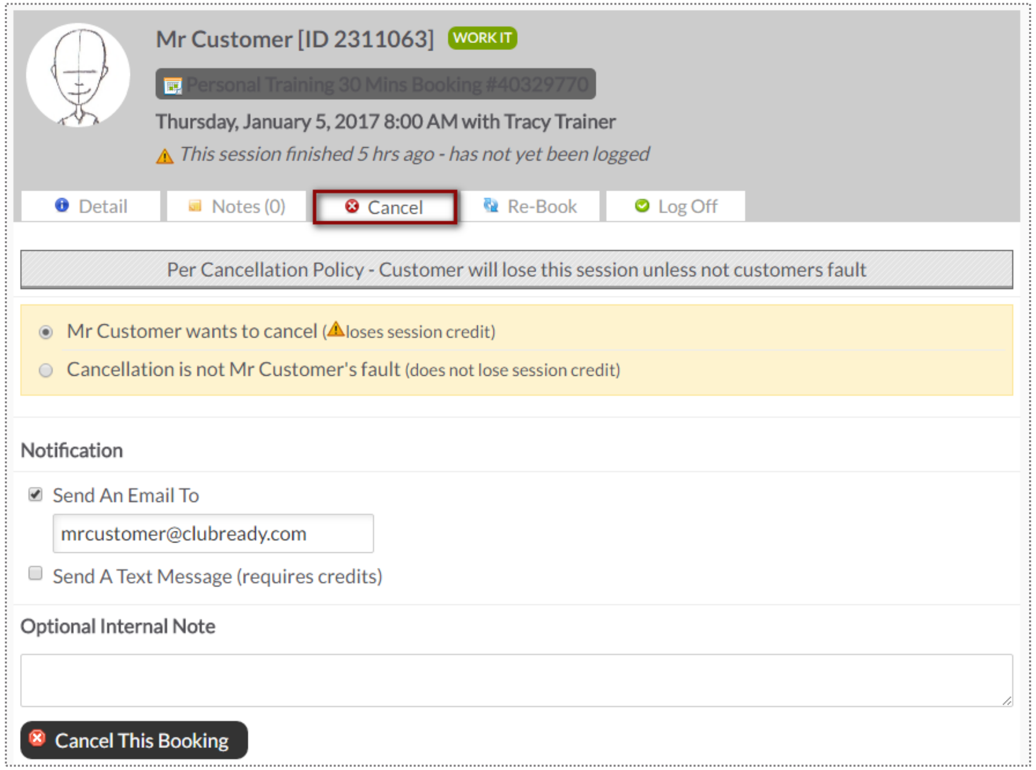


Click the **Add New Booking** button. Select the desired service and use the search box to search for your client.
Send An Email To or Send A Text Message to notify your client of their booking.
Select **Make The Booking** to complete.

Grid View: Cancel a Booking

Bookings > Grid View





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

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

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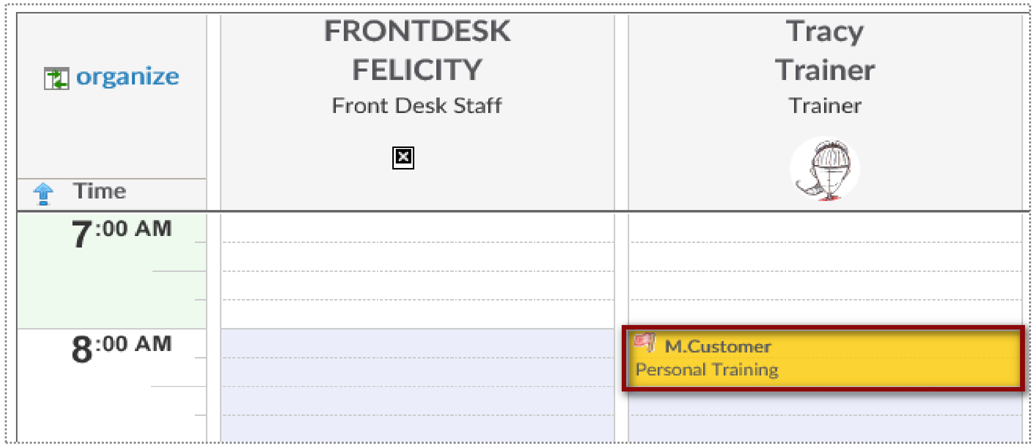
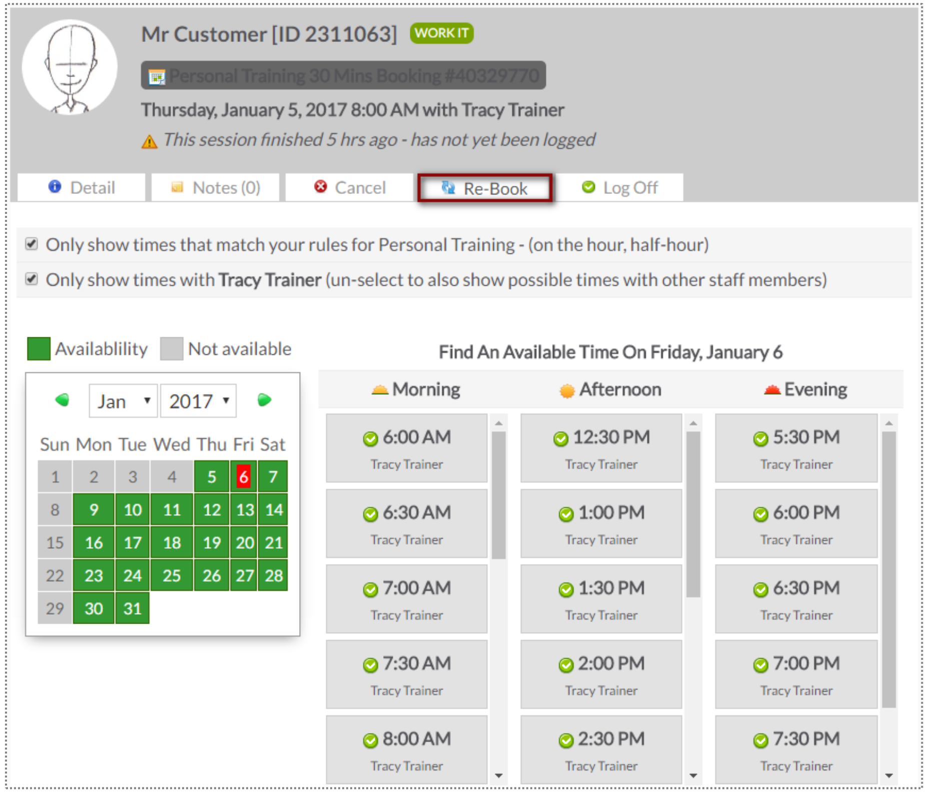
Grid View: Reschedule a Service Booking

Bookings > Grid View





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

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!

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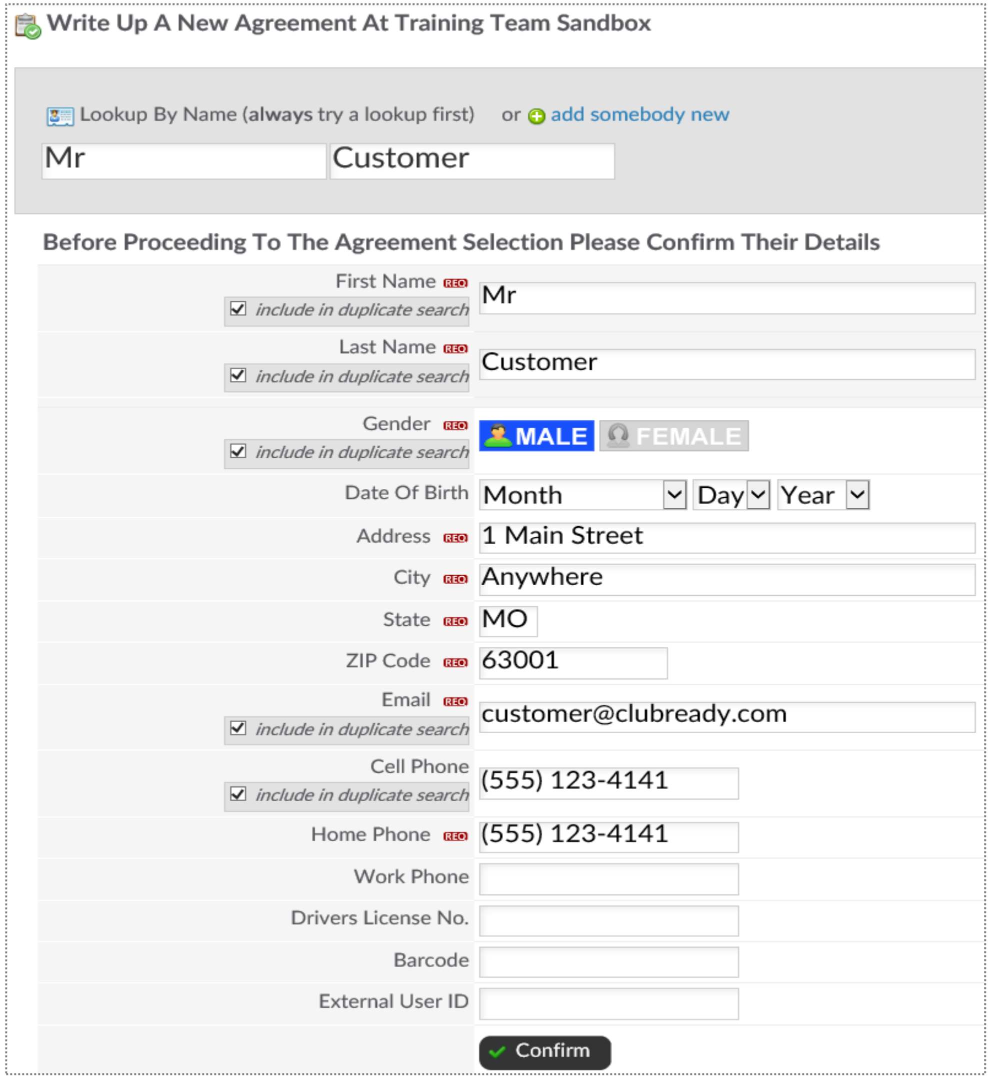
Writing an Agreement

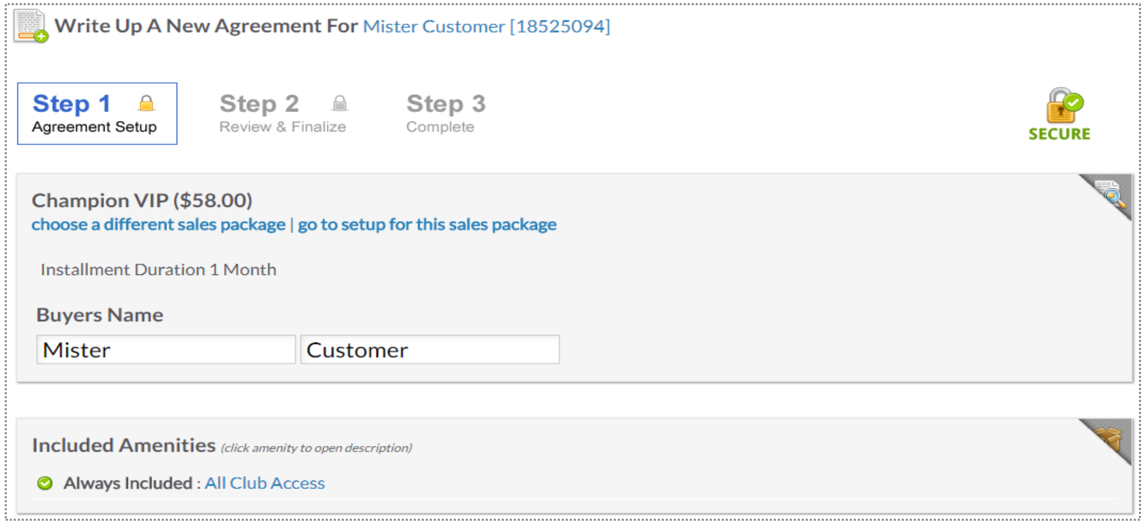
Main > New Agreement > Select Person > Confirm

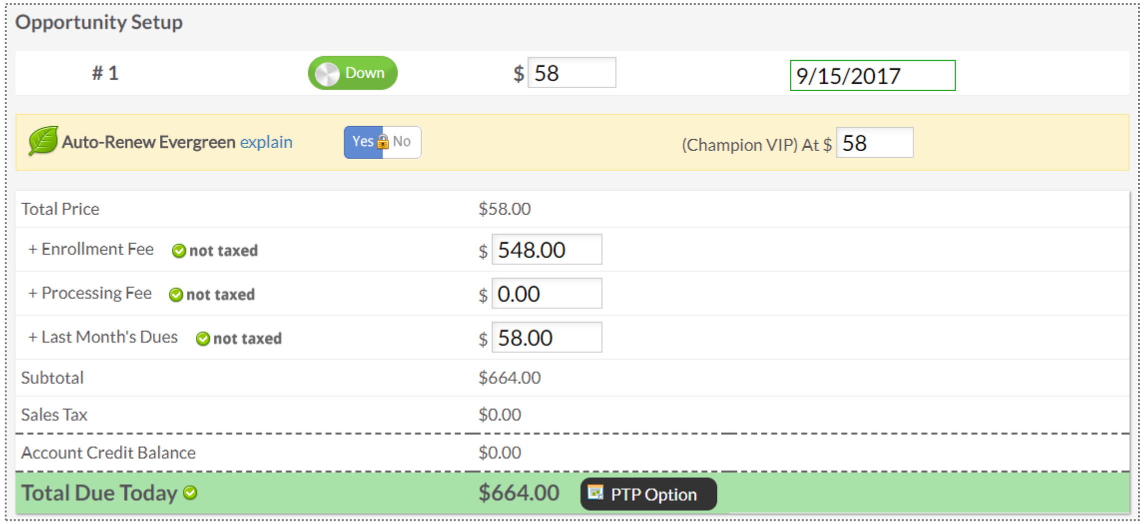


All fields that have the required icon (**REQ**) need to be filled out. All other fields are optional. Once you have verified all information click **Confirm** to continue.

Writing an Agreement

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





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.

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Writing an Agreement

Assigning Sales Commission & Member Contact

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

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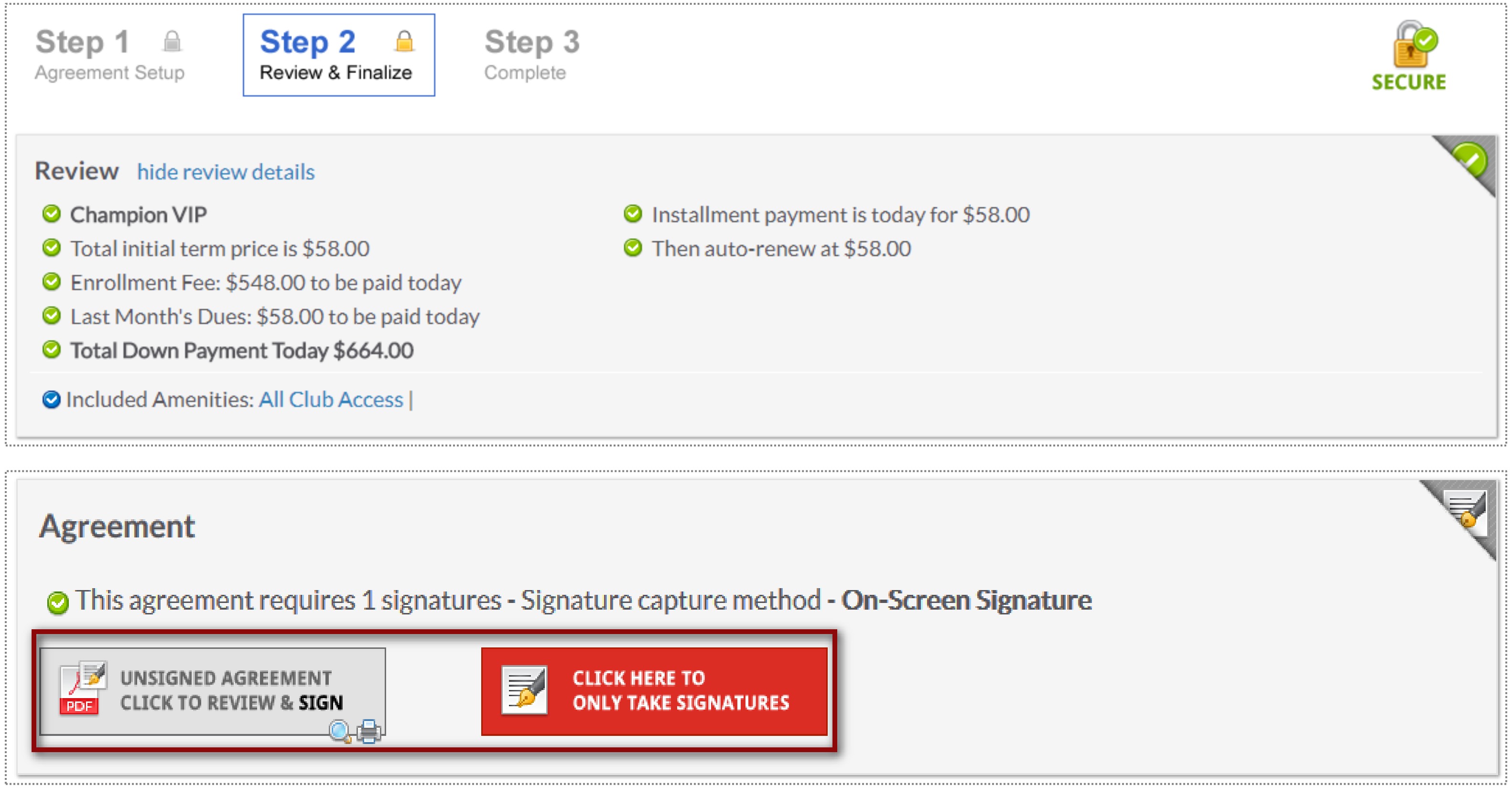
Writing an Agreement

Review Terms > Take Signatures



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

Select here to open full agreements for signatures.

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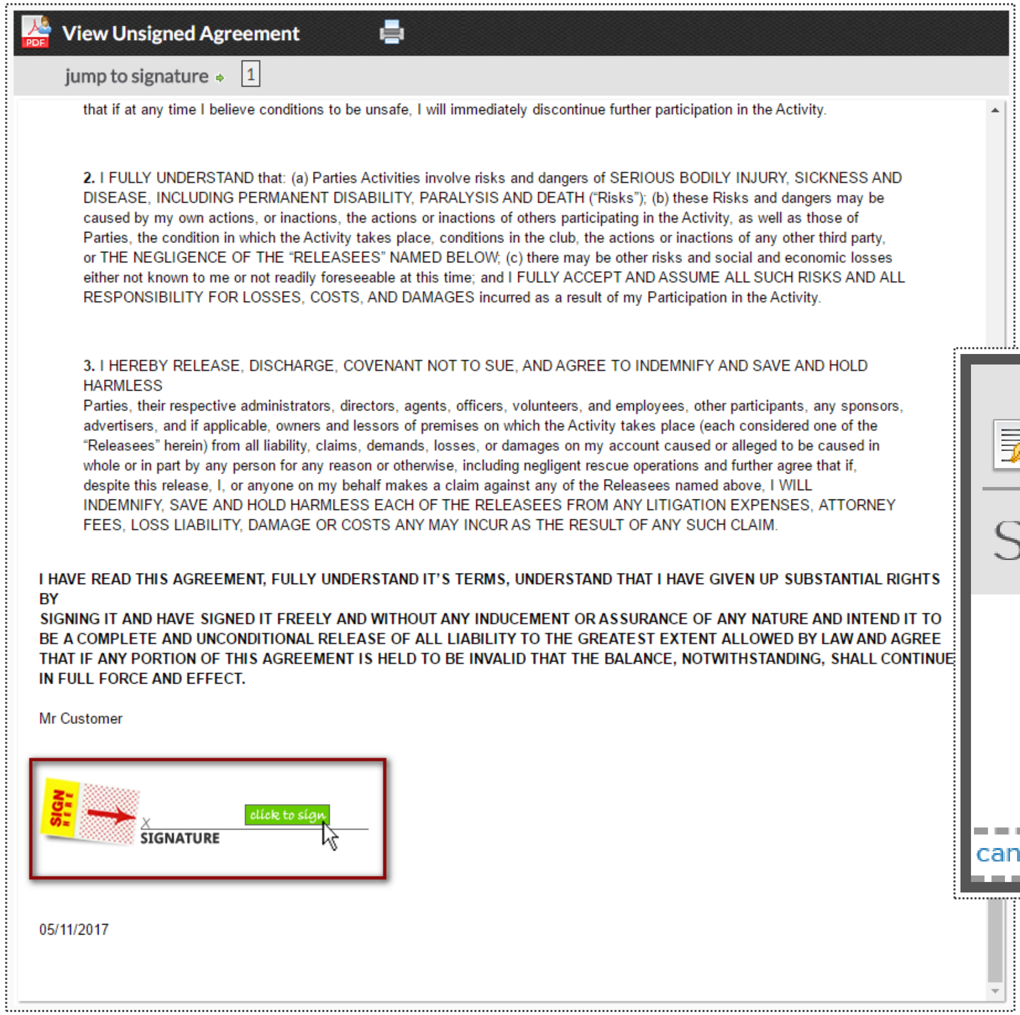
Taking Signature

Review Contract & Take Signatures


View Unsigned Agreement

jump to signature 1

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

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

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

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

Mr Customer

SIGN HERE x click to sign
SIGNATURE

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.

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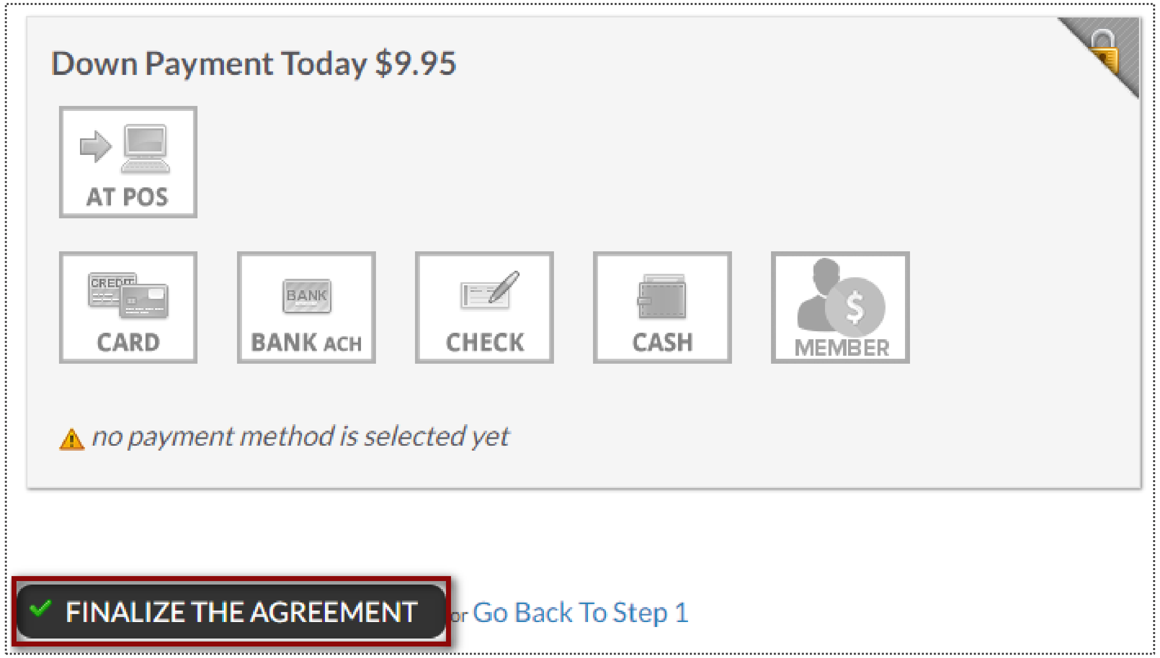
Writing an Agreement

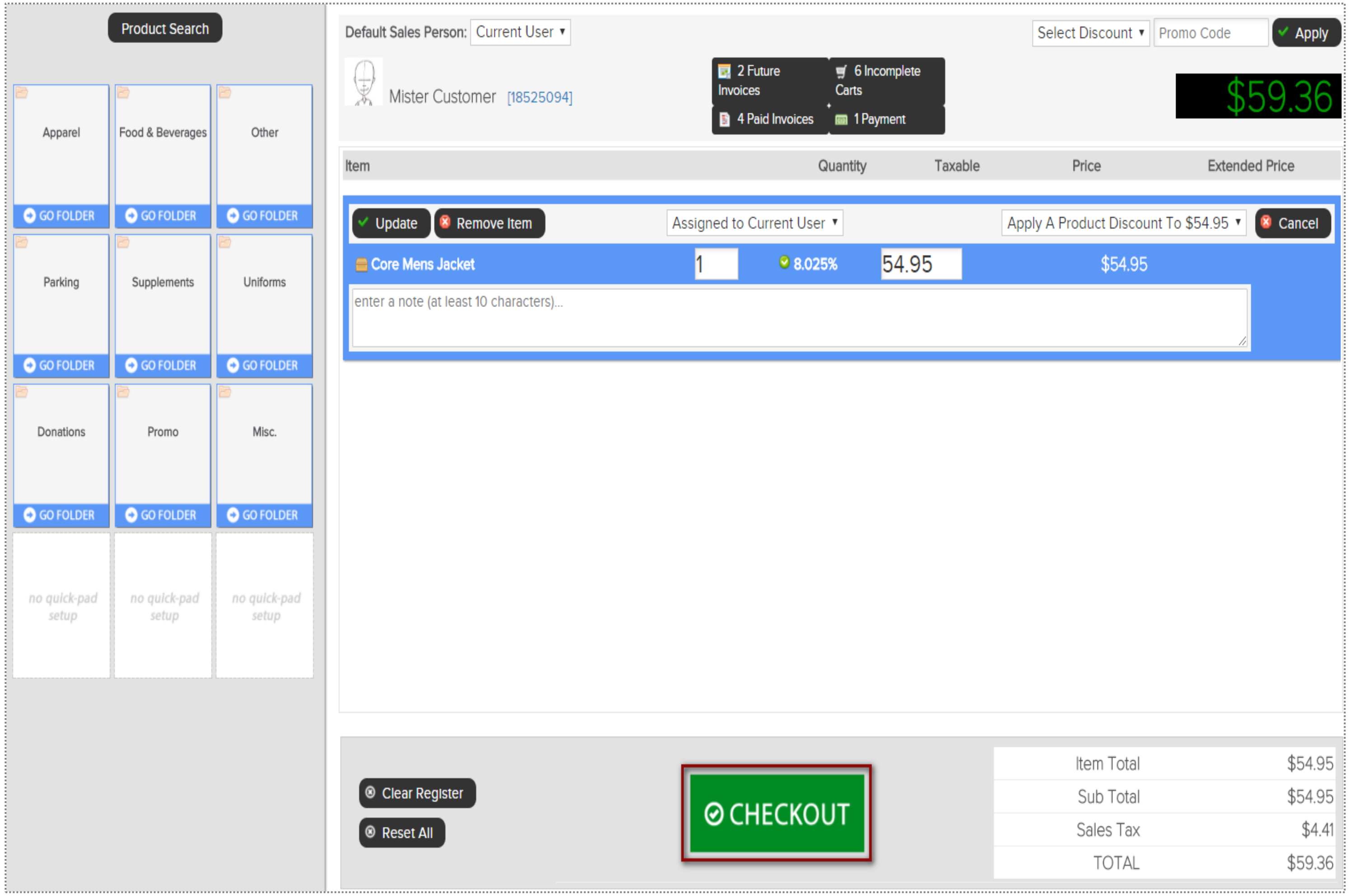
Take Payment & Finalize the Deal



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.



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.

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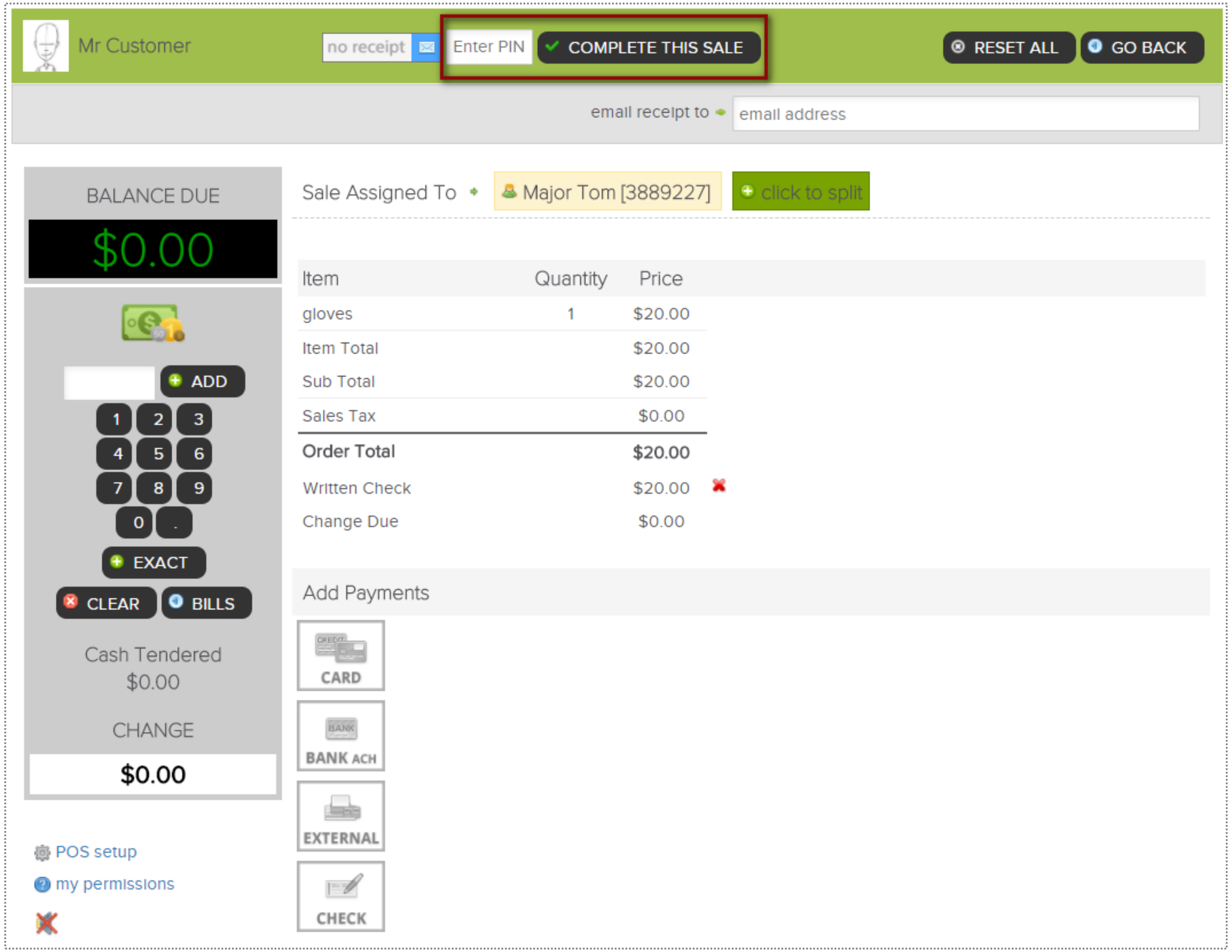
Finalizing the Purchase

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



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

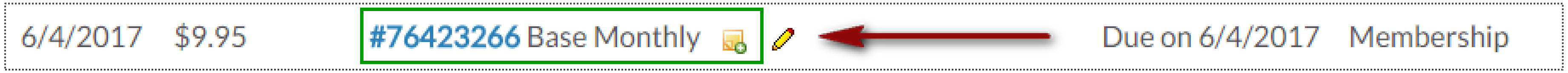
If a customer is paying by cash, select the EXACT option or select from the pad to enter a specific dollar amount.

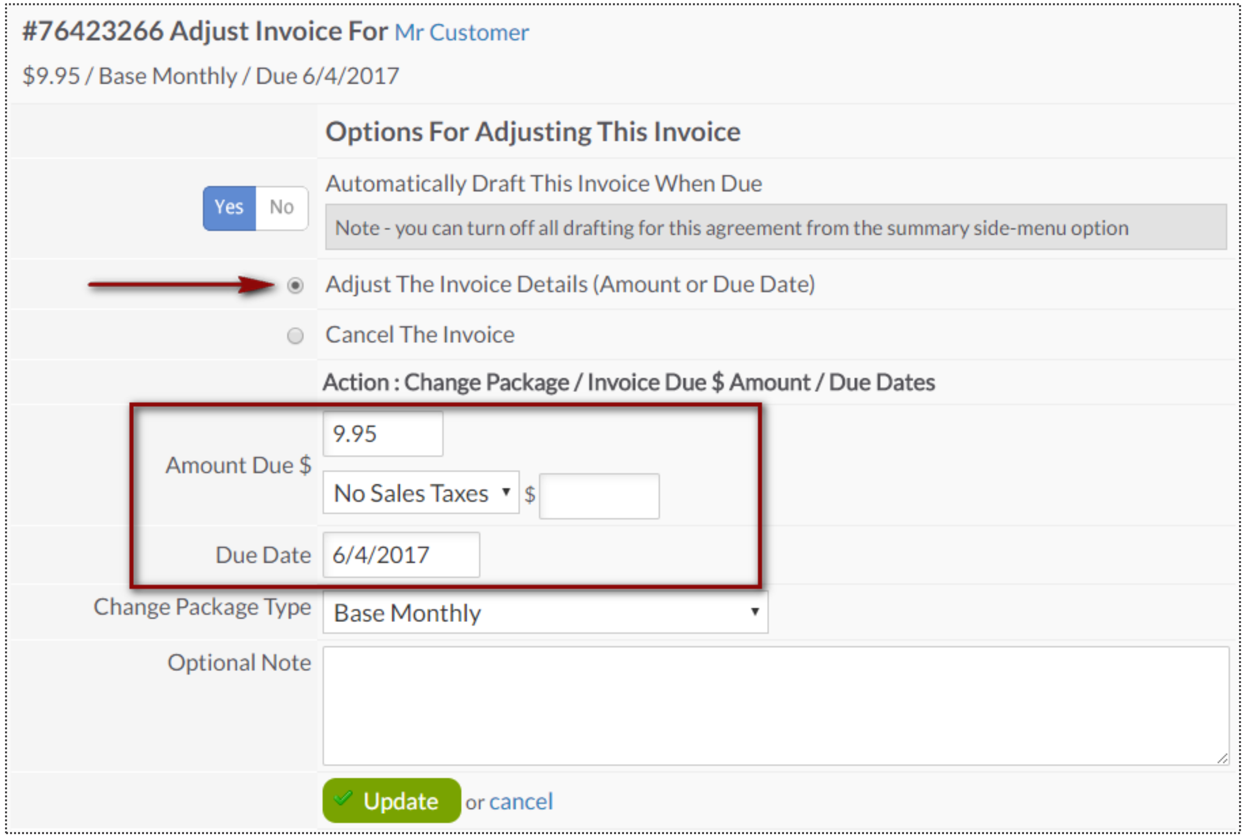
The sale will be assigned to the staff person currently logged in, however this person can be changed if needed. To change who the sale is assigned to, click on the existing name and then choose from a list of staff.

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

Invoice Adjustment

Member > Billing > Invoices > Edit Pencil





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.

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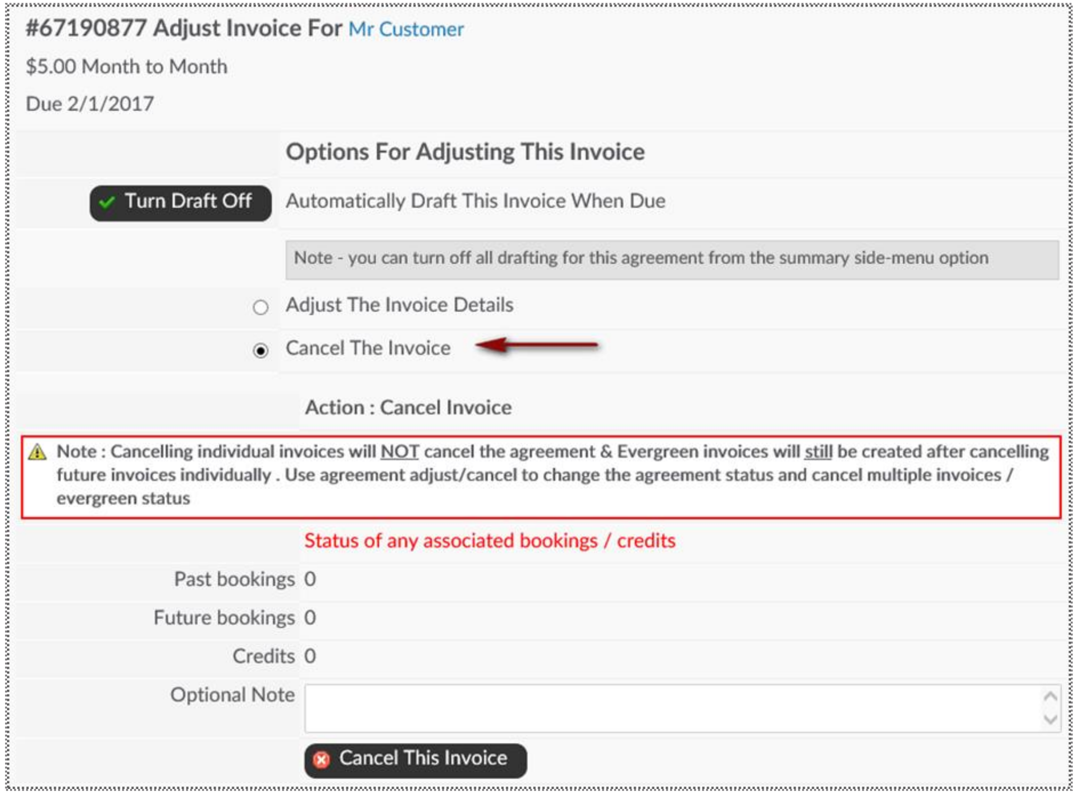
Cancel an Invoice

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

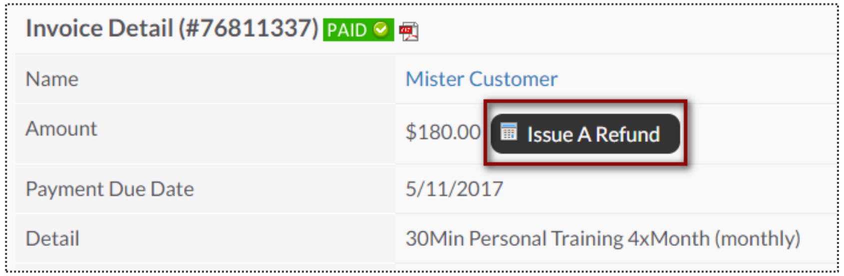


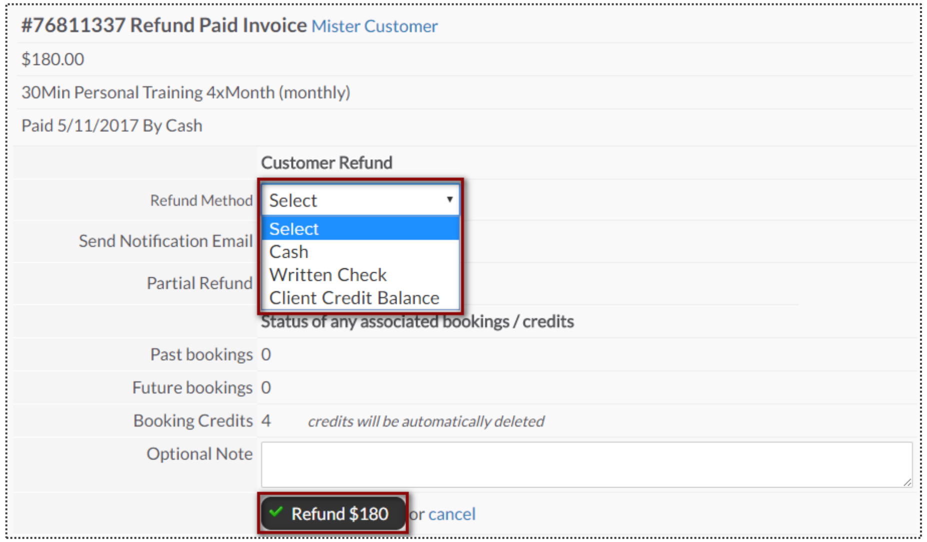
Selecting the option **Cancel The Invoice** will update the screen to display all options for adjusting the invoice. Click the **Cancel This Invoice button** to complete the cancellation.

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



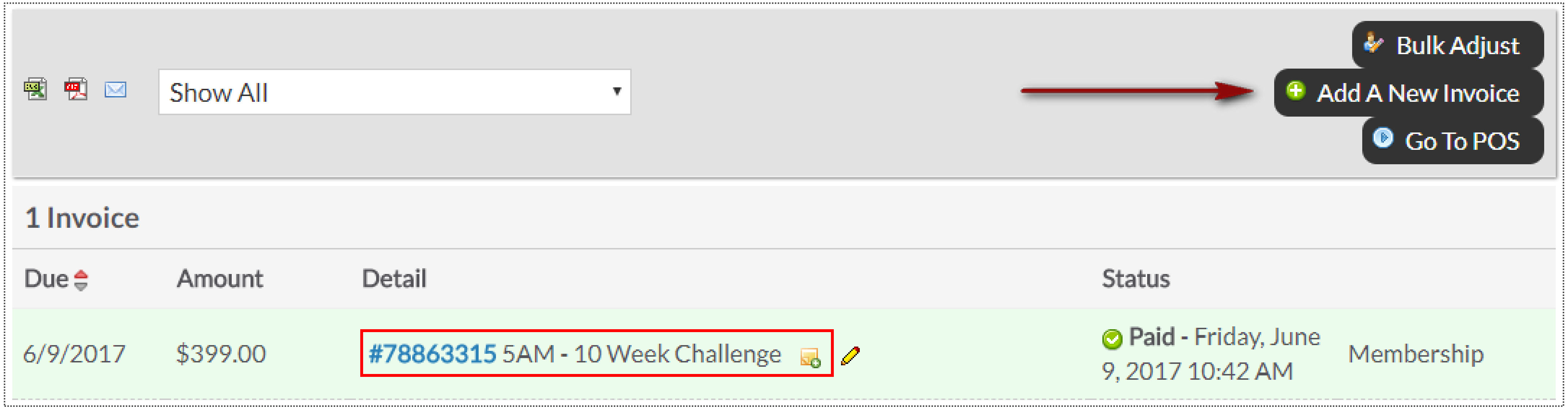


After select the blue invoice id#, Select **Issue A Refund** for refund options.

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

Adding a New Invoice

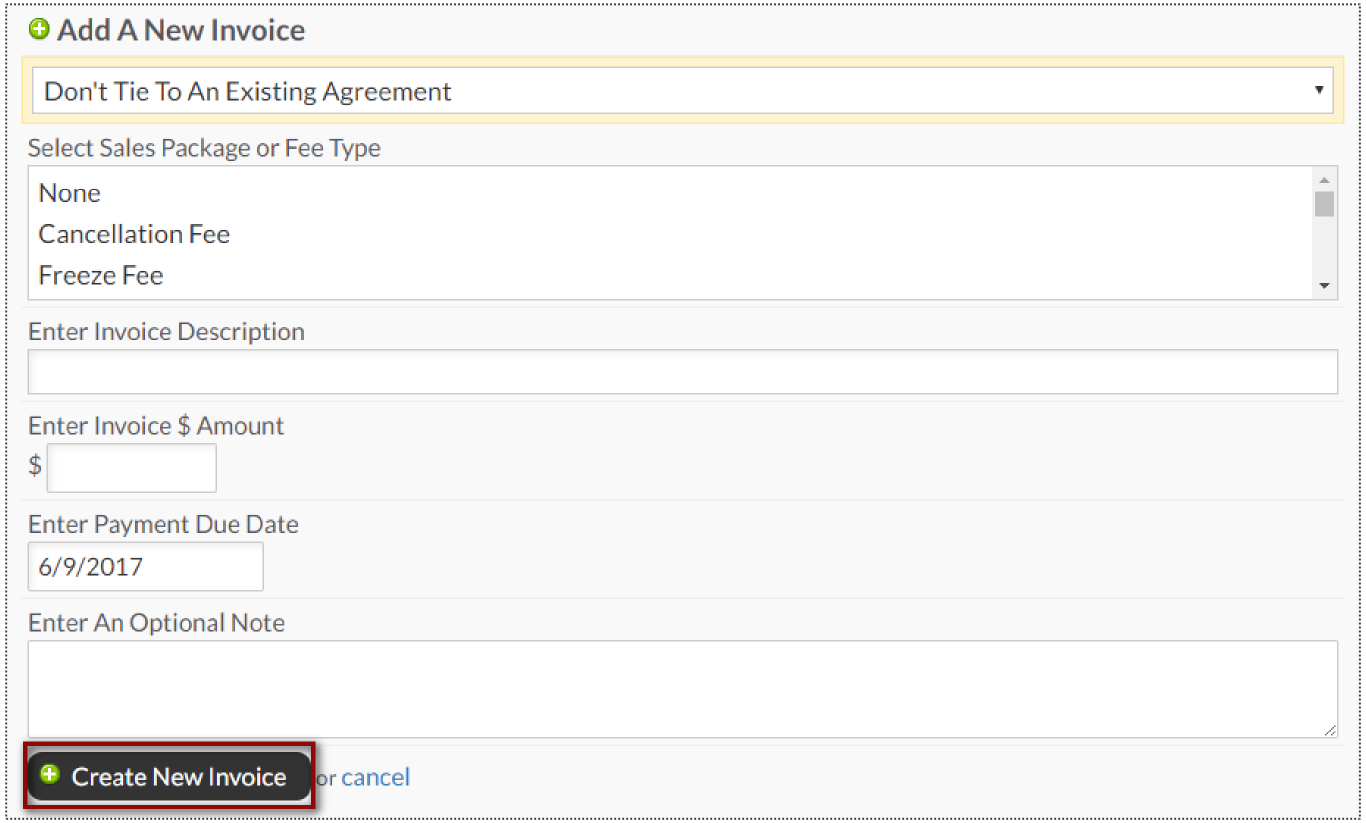
Member > Billing > Invoices



Once you are on the **Invoices and Payments** screen, click the **Add A New Invoice** button.

Adding a New Invoice

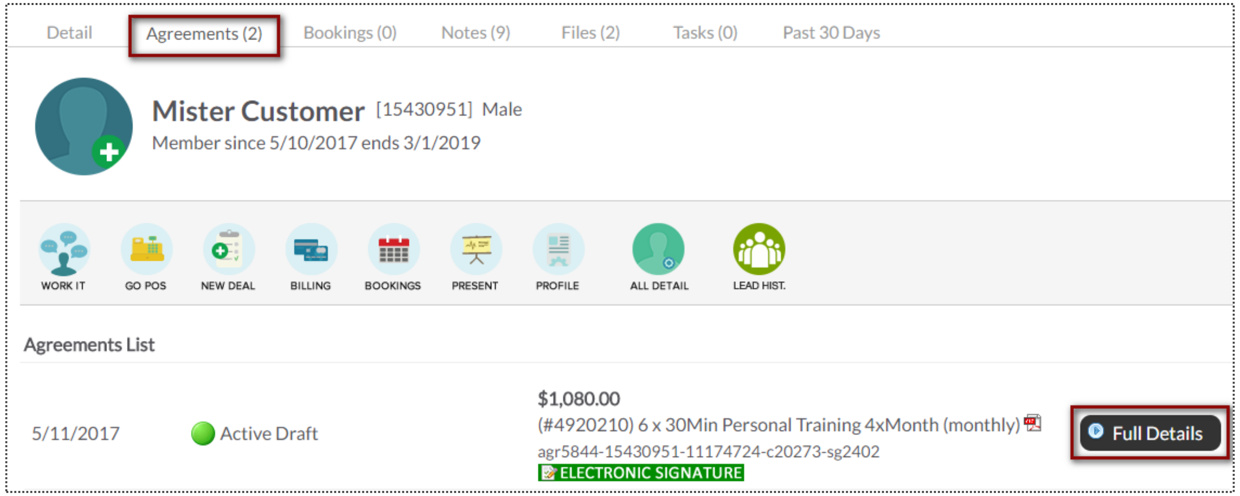
Member > Billing > Invoices > Add A New Invoice

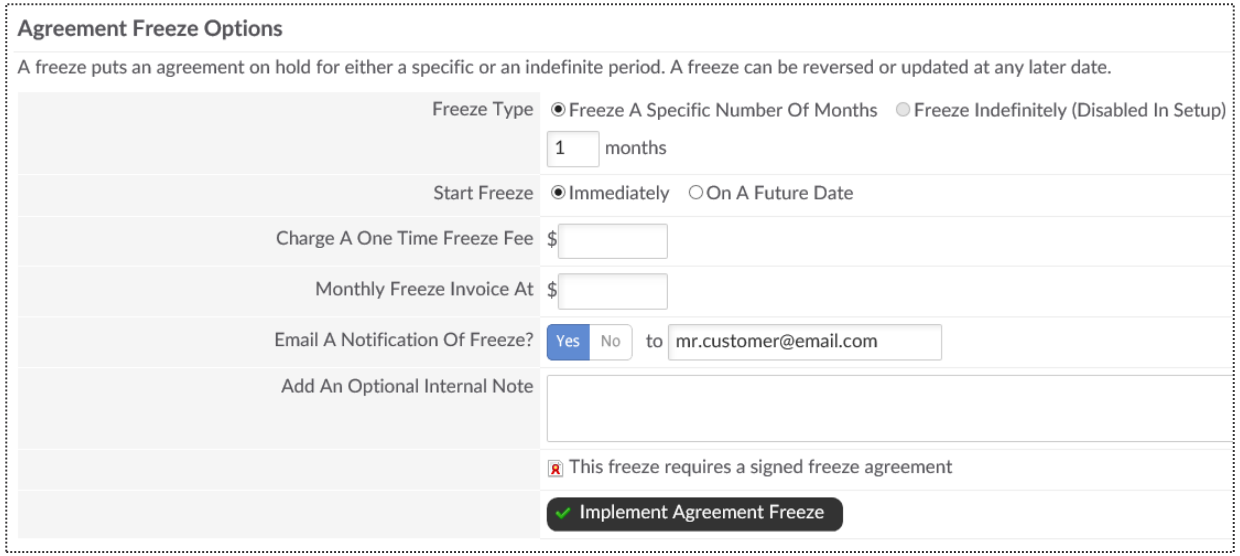


You have the option from here to **Tie to An Agreement, Select A Sales Package or Fee Type, Invoice Description, Invoice Amount, Payment Due Date and an Optional Note.** To finalize, click **Create New Invoice**

Freeze an Agreement

Member Account > Agreements > Full Details > Freeze Options





From this screen you can select the following: **Freeze Type, Start Freeze, Membership Expiration Date** and **Email Notification of Freeze.**

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

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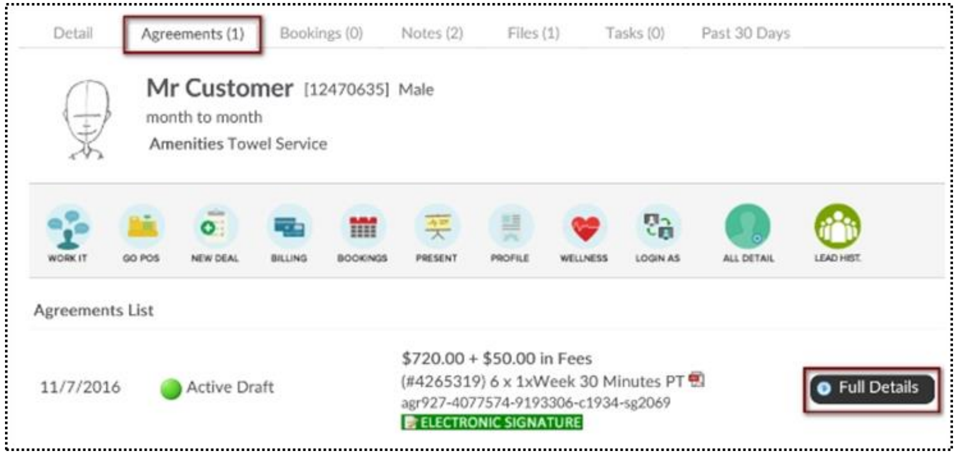
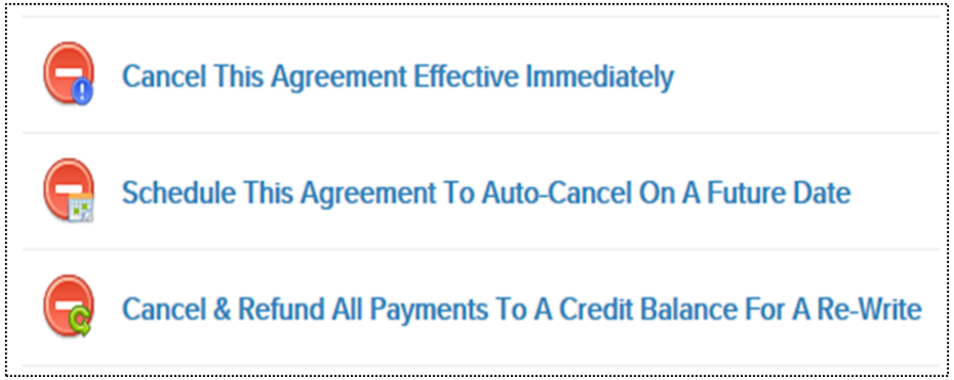
Cancel an Agreement

Member Account > Agreements > Full Details > Cancel This Agreement





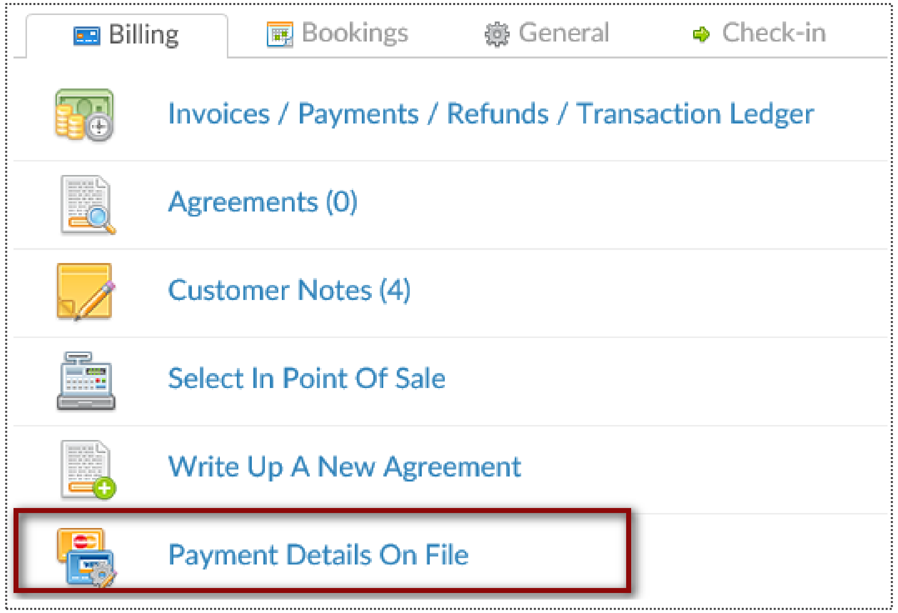
Cancel This Agreement Effective Immediately: This agreement will be cancelled today. All unpaid invoices will be cancelled.

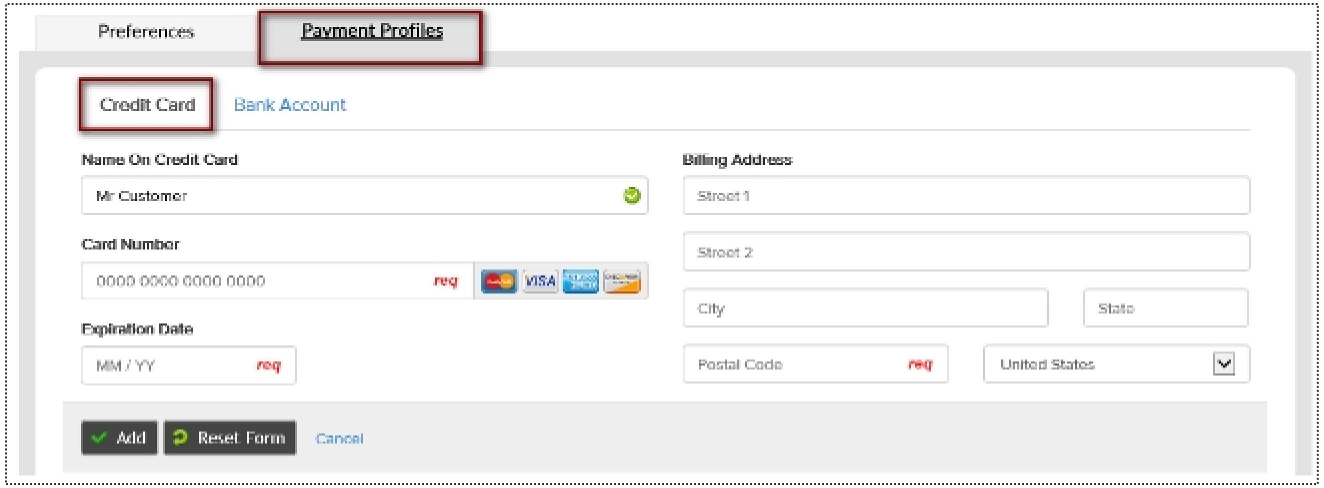
Schedule This Agreement To Auto-Cancel On A Future Date: This agreement will be auto-cancelled on a future date you select. The agreement will not change until that date.

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

Add/Update Card on File

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





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

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

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

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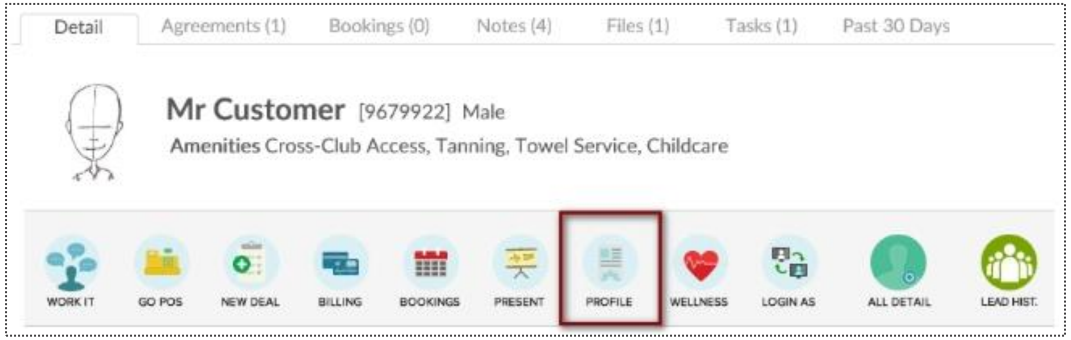
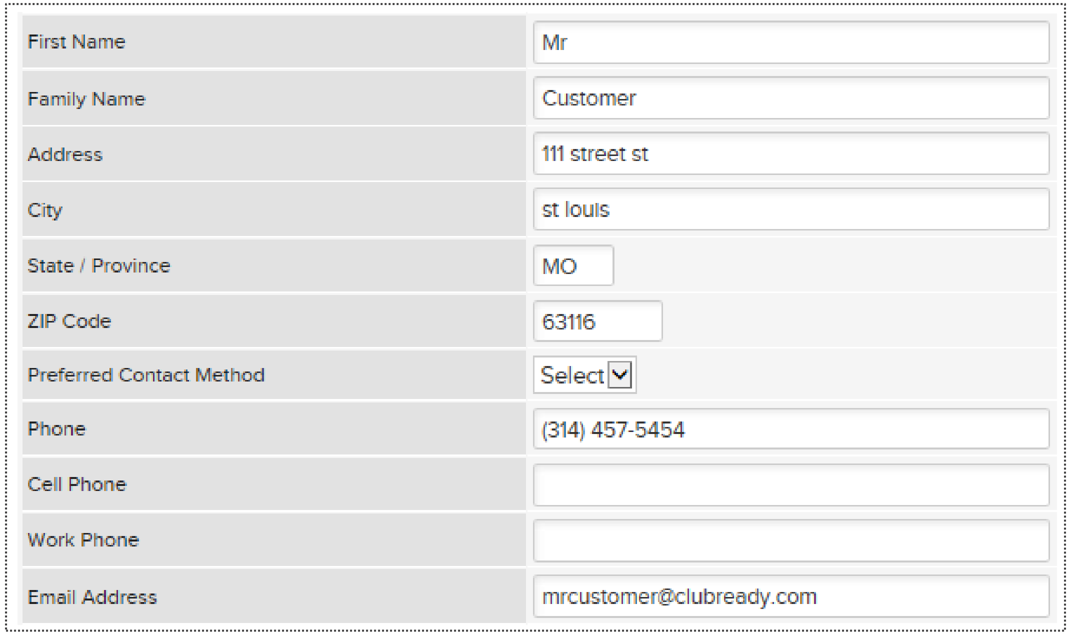
Update Member's Profile

Member Account > Profile





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

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

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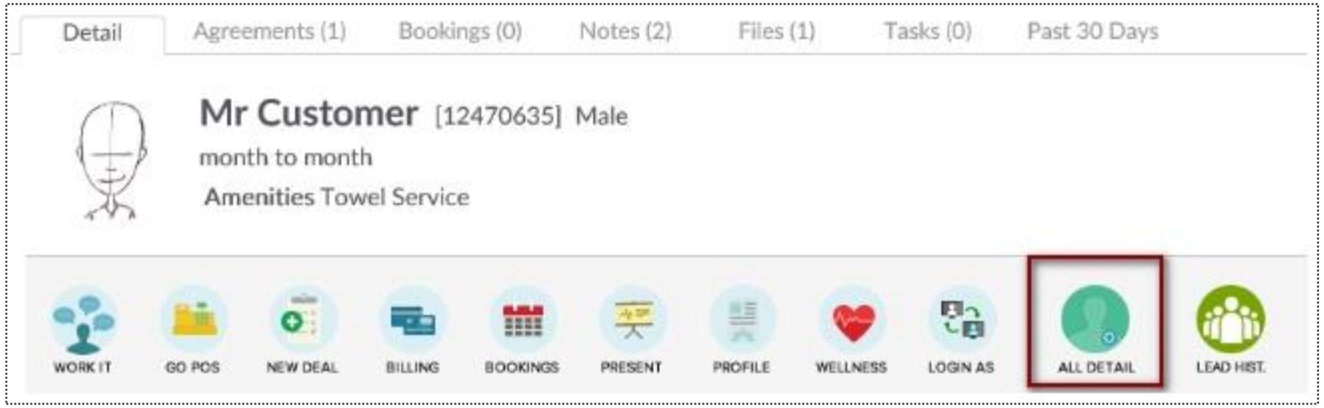
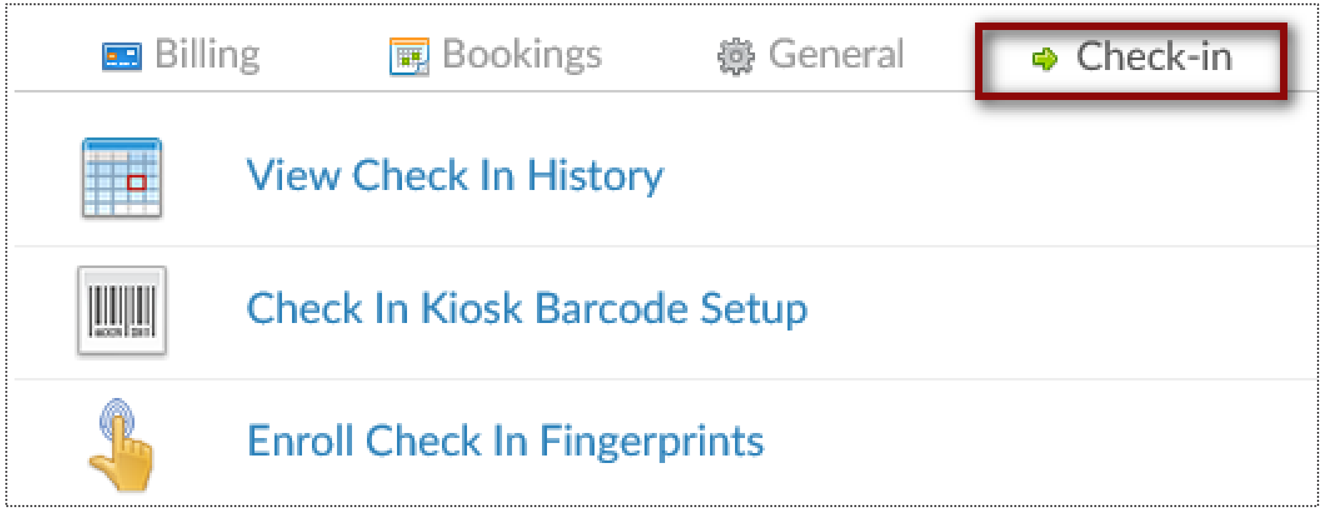
Add/Update Check In Barcode

Member Account > All Detail > Check-in



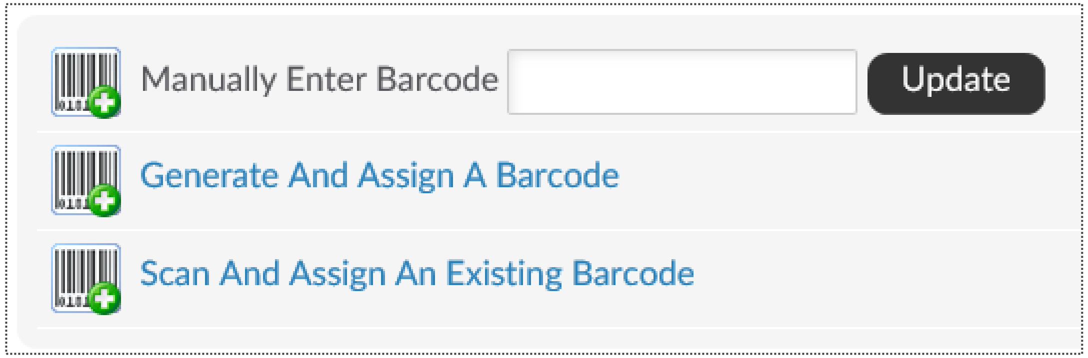
Find the Prospect or Member/Customer you wish to assign or update a barcode for. Click on the **All Detail** button > **Check In** tab.



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

Add/Update Check In Barcode

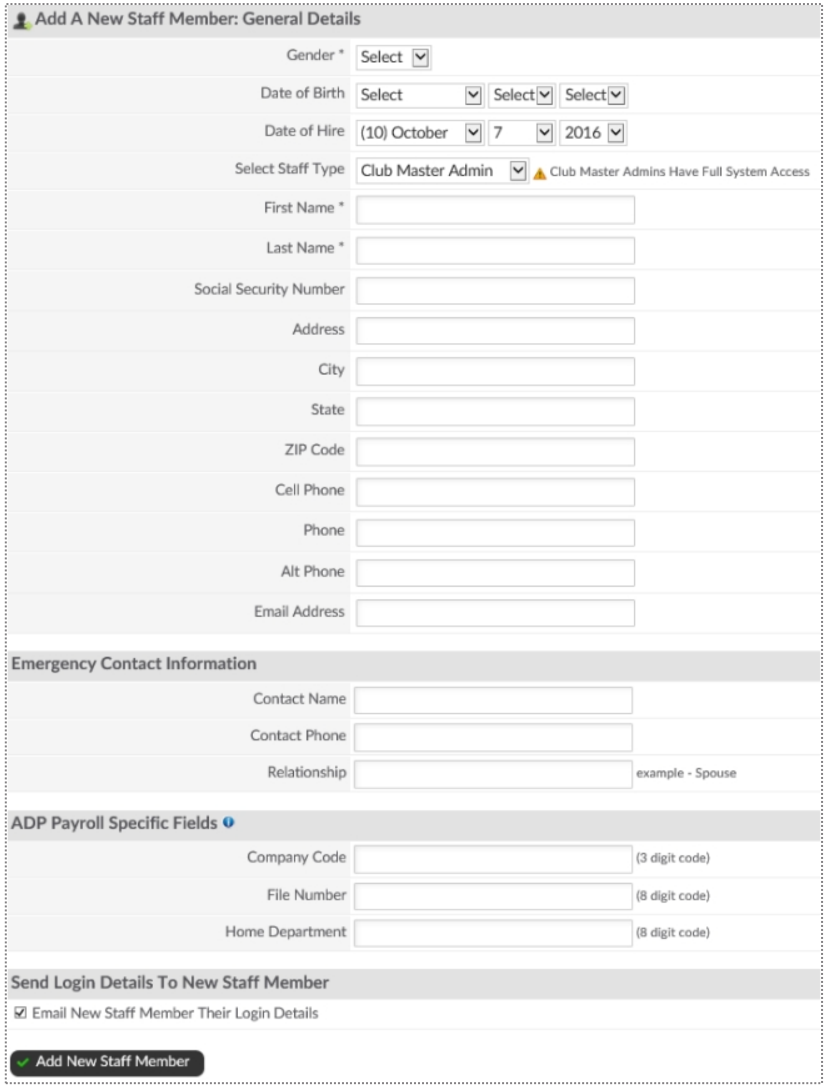
Member Account > All Detail > Check-in



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 *
Last Name *
Social Security Number
Address
City
State
ZIP Code
Cell Phone
Phone
Alt Phone
Email Address

Emergency Contact Information

Contact Name
Contact Phone
Relationship — example - Spouse

ADP Payroll Specific Fields

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

Send Login Details To New Staff Member

☑ Email New Staff Member Their Login Details

Add New Staff Member

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

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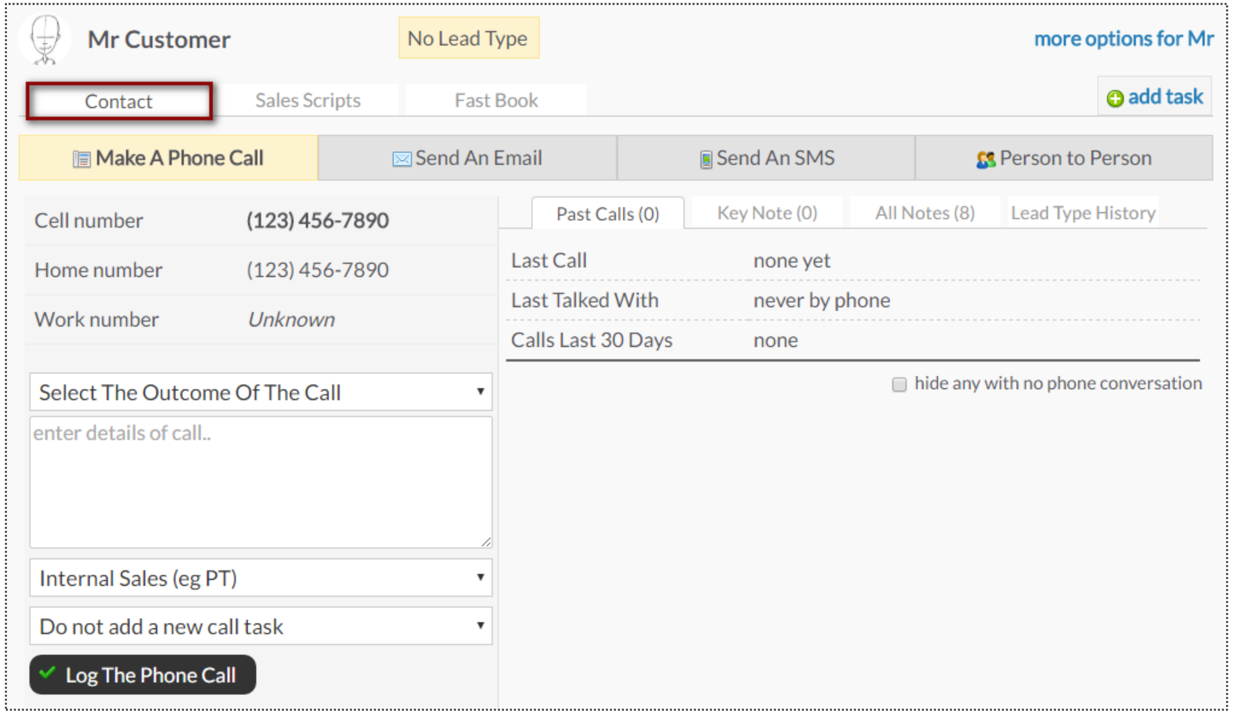
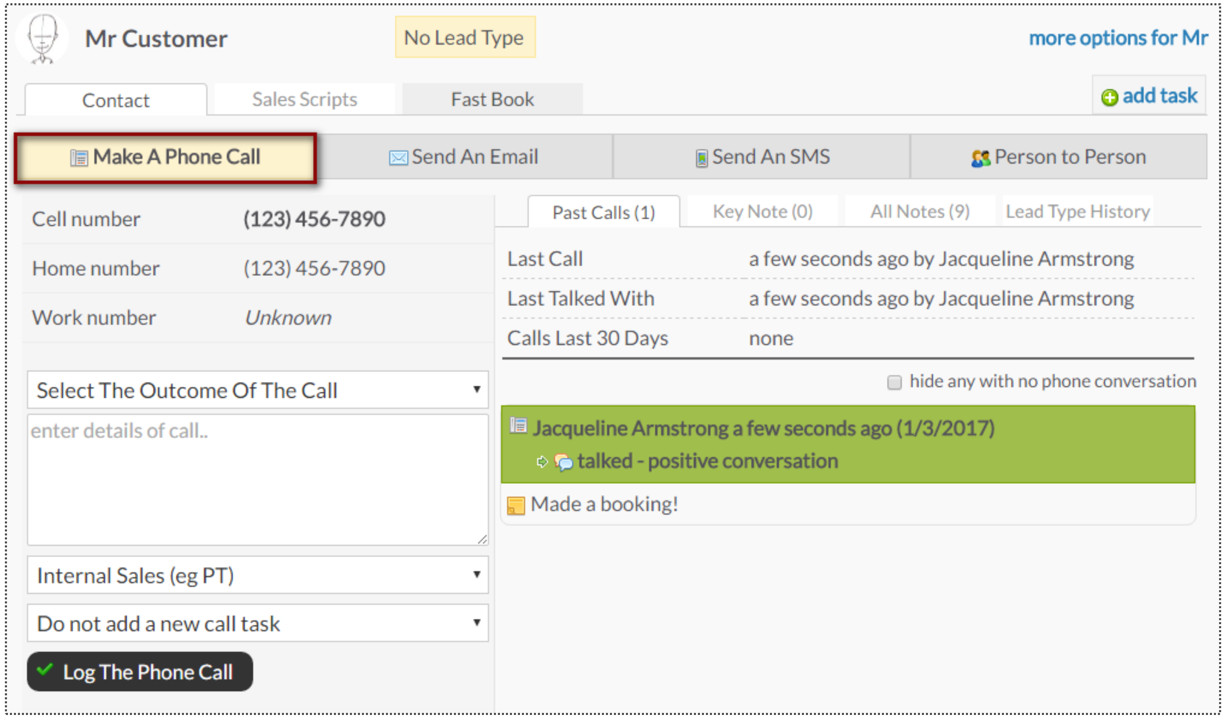
Work It: Contact



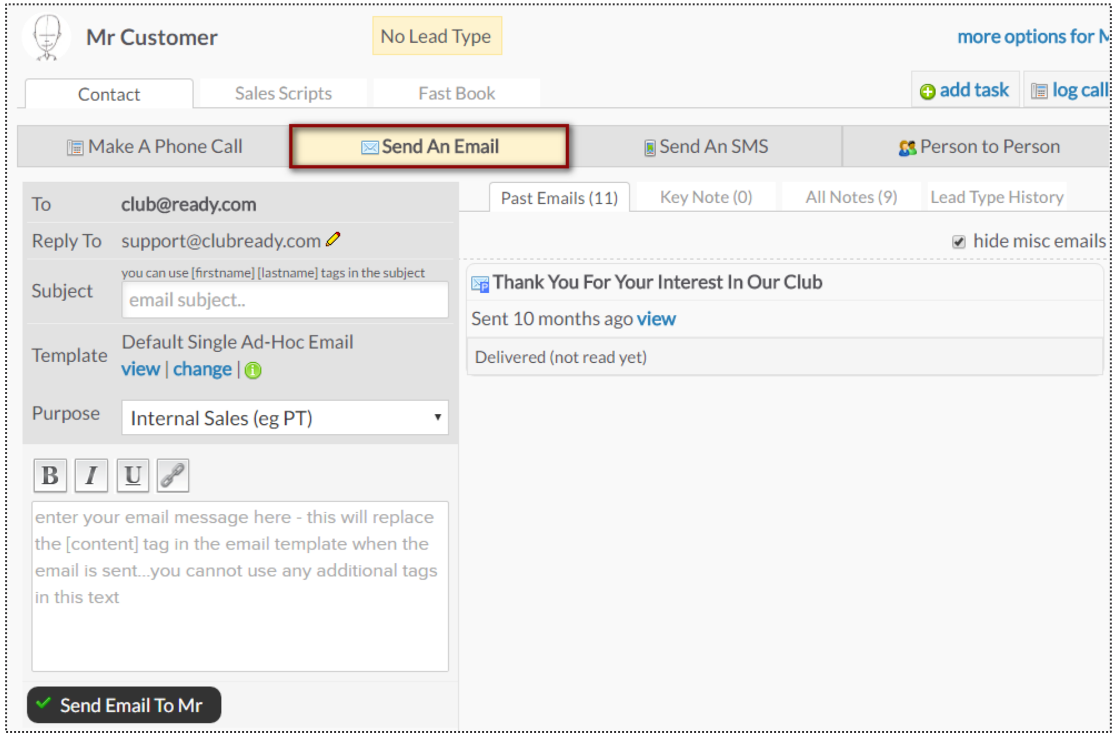
The **Contact** tab provides different contact methods that can be taken for your Prospects and Members. The options include logging phone calls, sending an email, sending an SMS (text) message, and logging person to person contact.

Work It: Phone Call



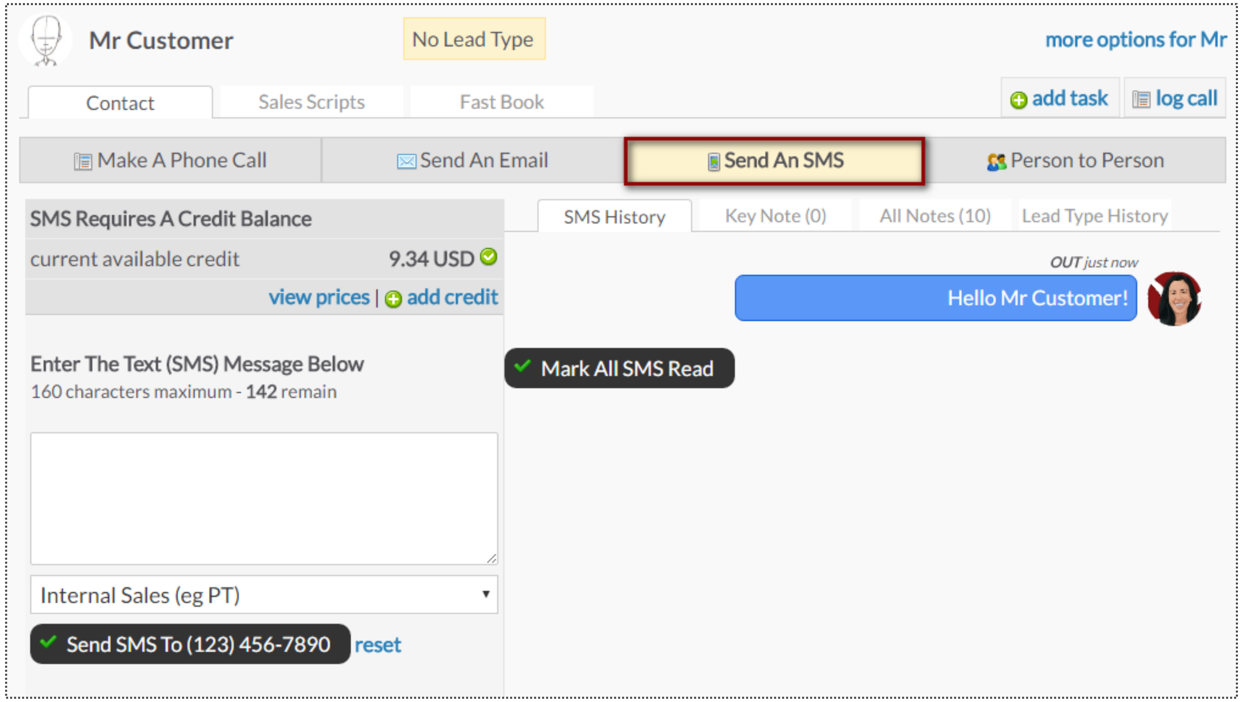
The **Make A Phone Call** tab will show the client's contact numbers, last call information, and a chronological history of the calls.

Work It: Email



The **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)



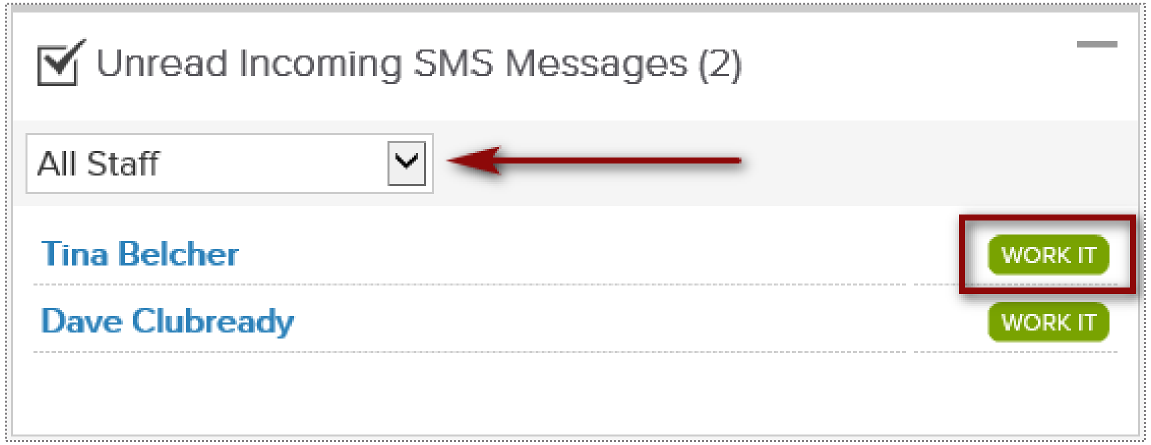
The **Send An SMS** tab allows you to send a text message to your client as well as view any past texts.

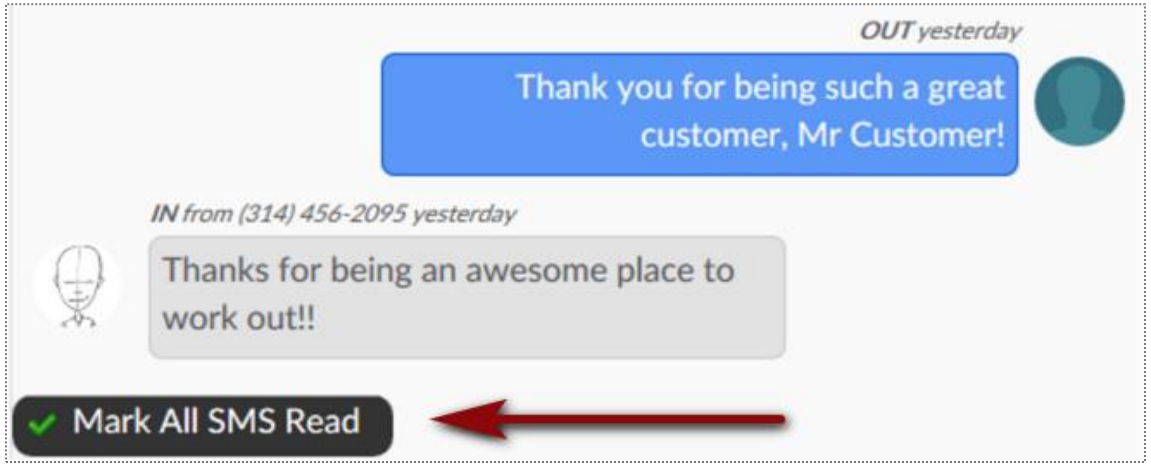
Note: Outgoing text messages have a cost of $0.02.

Next slide will show how to view incoming text messages.

Widget: Unread Incoming SMS Messages

Main Dashboard





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.**

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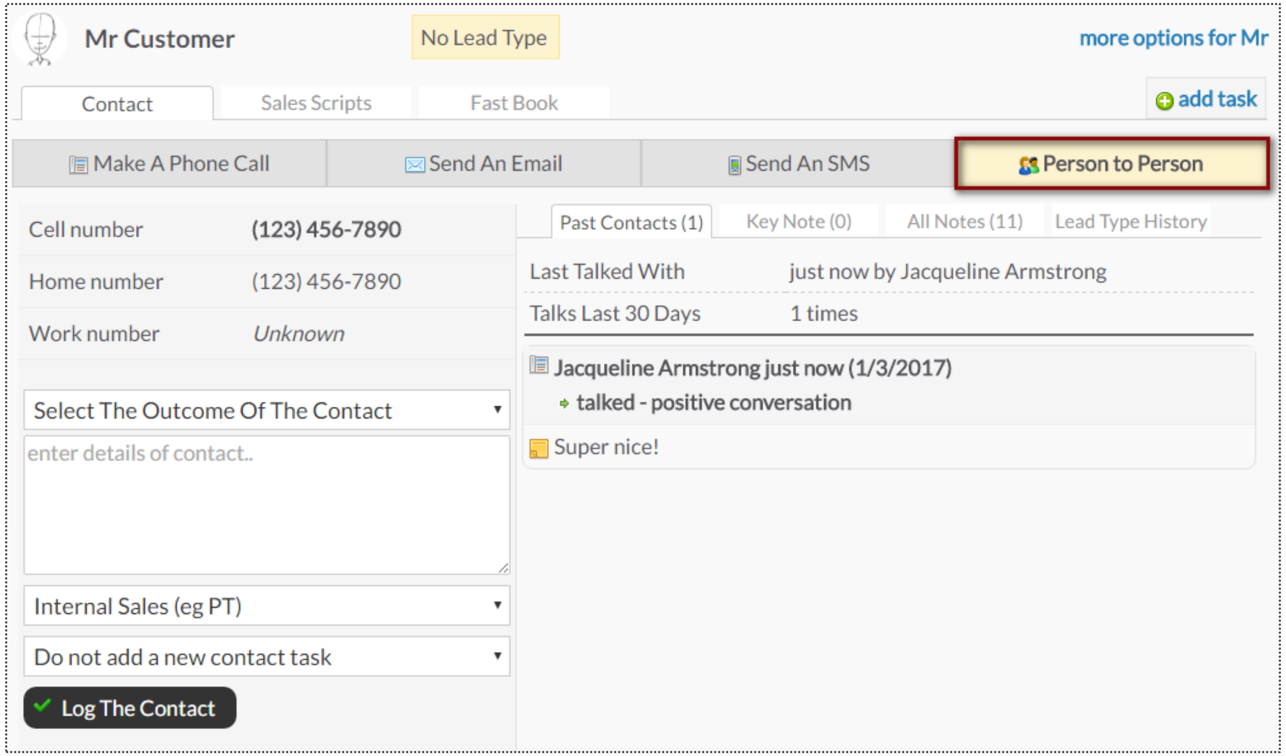
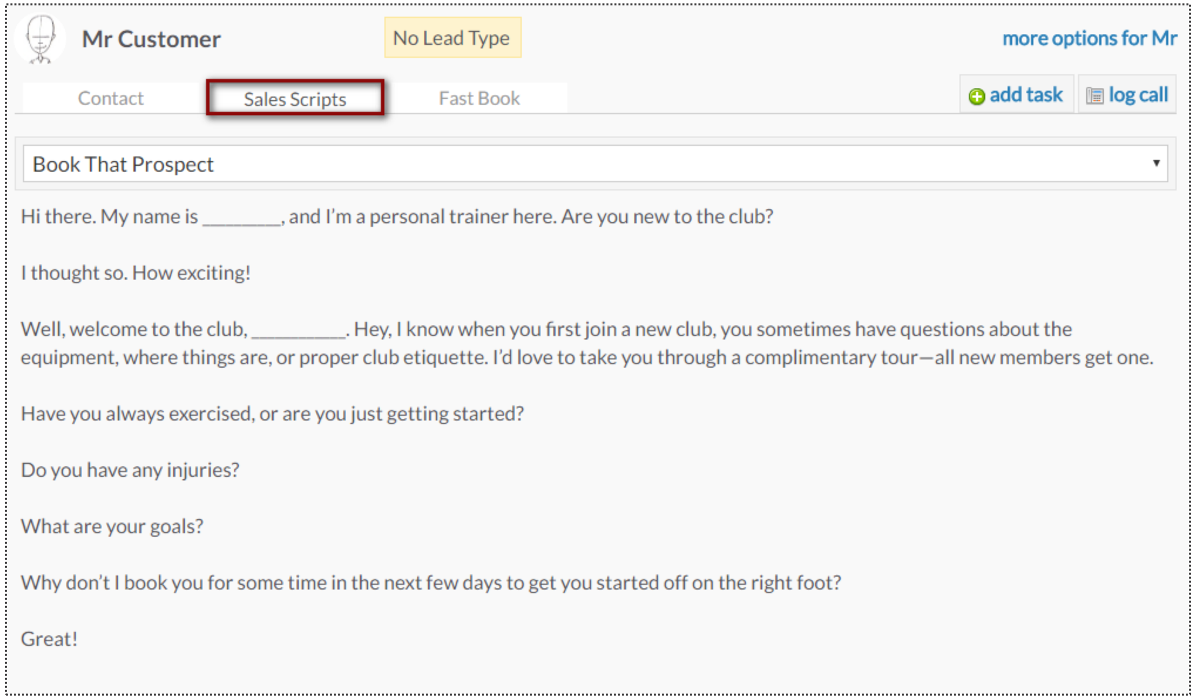
Work It: Person to Person



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

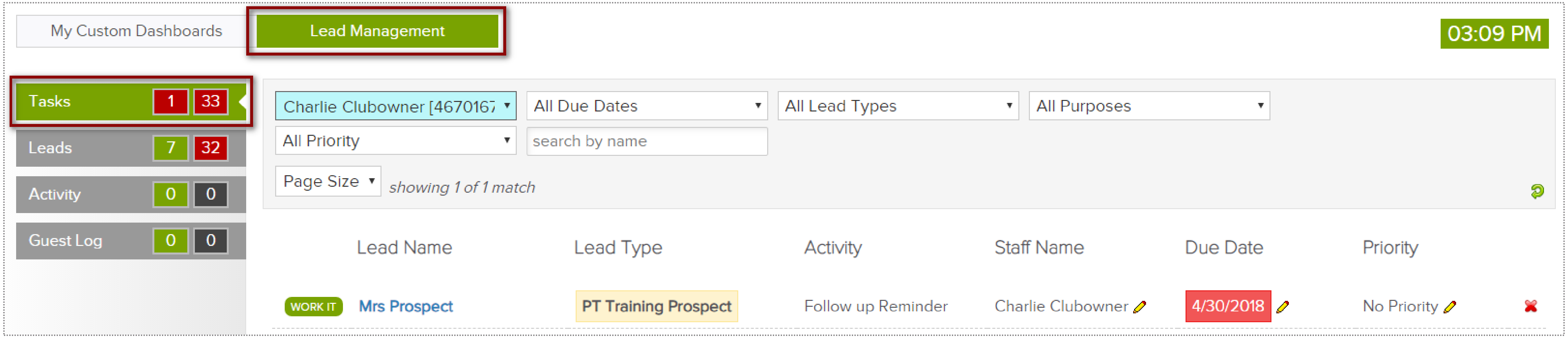
Work It: Sales Scripts



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

Lead Management Dashboard: Tasks

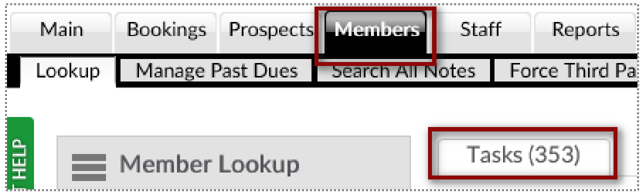
Main > Dashboard



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

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

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



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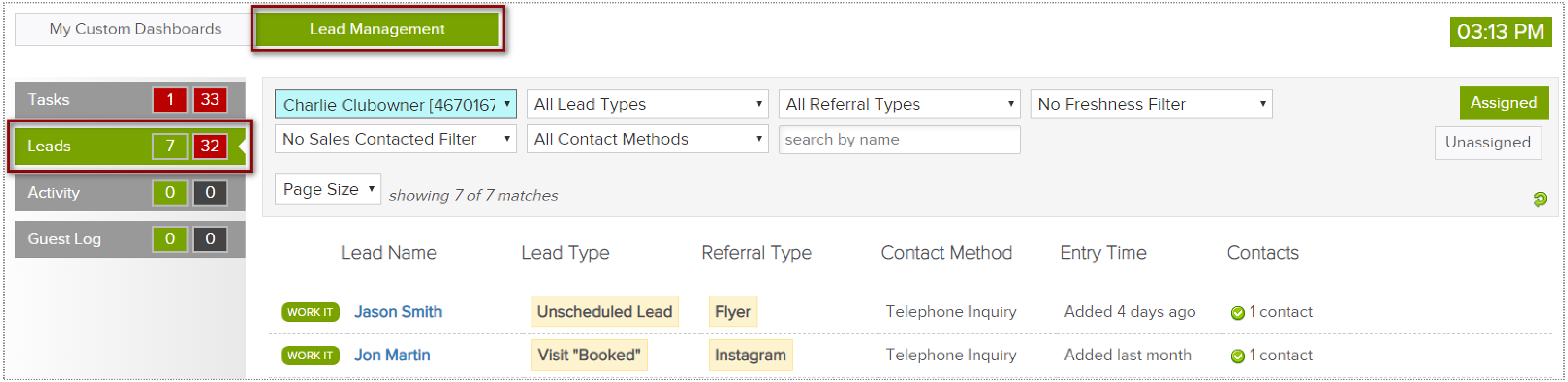
Lead Management Dashboard: Activity

Main > Dashboard

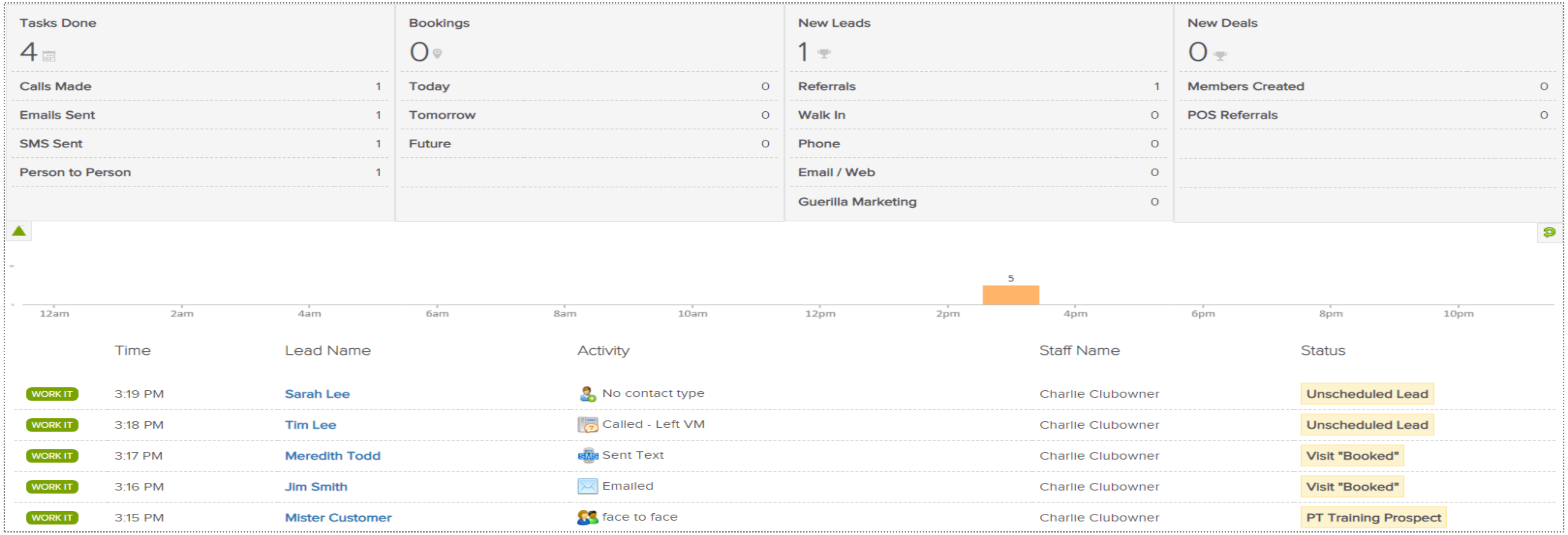


The **Leads** tab will display all of the leads added. The number displayed to the left show leads assigned to the staff member currently logged in. The number displayed to the right show all of the club's leads.

The screen will display a list with the **Lead Name**, **Lead Type**, **Referral Type**, **Contact Method**, **Entry Time** and **Contacts**. Click on **WORK IT** if you need to follow up with the lead and log the contact details.

Lead Management Dashboard: Activity

Main > Dashboard



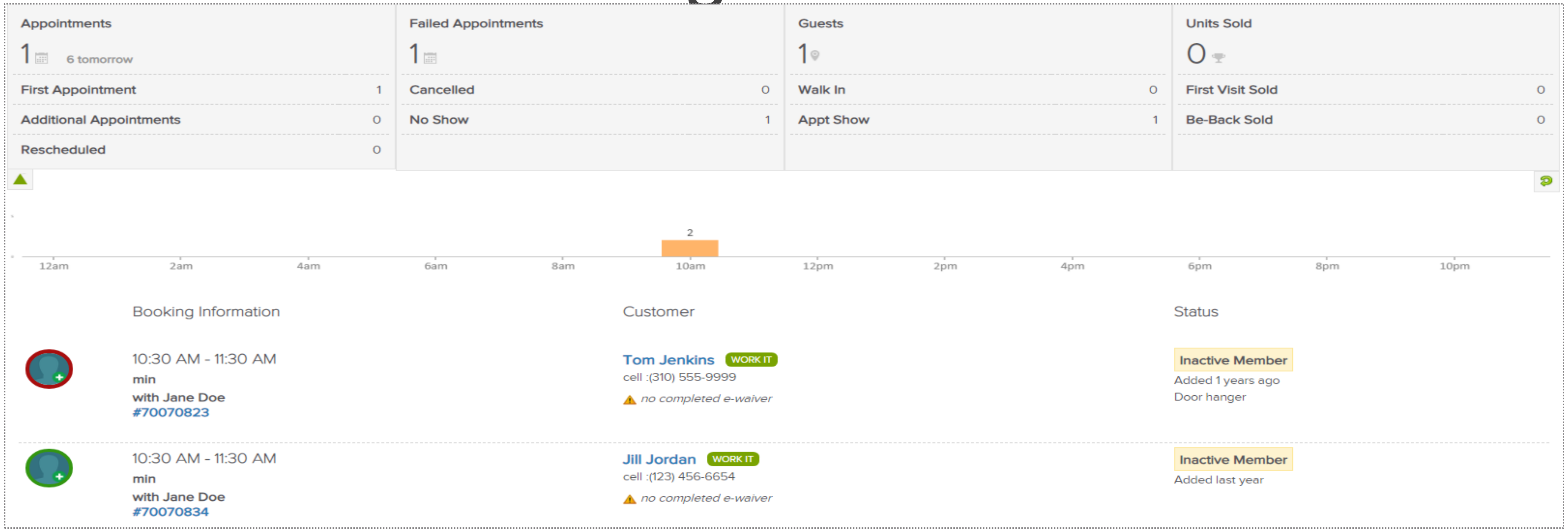
Tasks Done		Bookings		New Leads		New Deals	
4		0		1		0	
Calls Made	1	Today	0	Referrals	1	Members Created	0
Emails Sent	1	Tomorrow	0	Walk In	0	POS Referrals	0
SMS Sent	1	Future	0	Phone	0		
Person to Person	1			Email / Web	0		
				Guerilla Marketing	0		

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

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

Lead Management Dashboard: Guest Log

Main > Dashboard



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

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

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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

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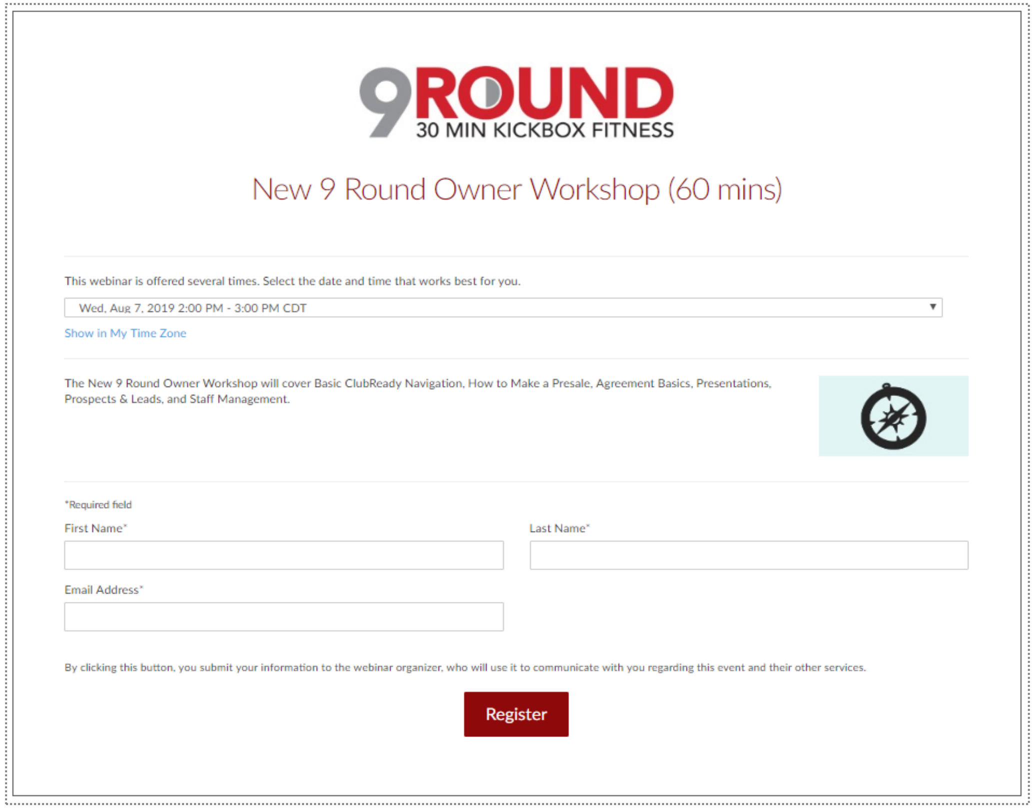
30 MIN KICKBOX FITNESS

Training: New 9Round Owner Workshop

Learn > Training


9ROUND
30 MIN KICKBOX FITNESS

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*

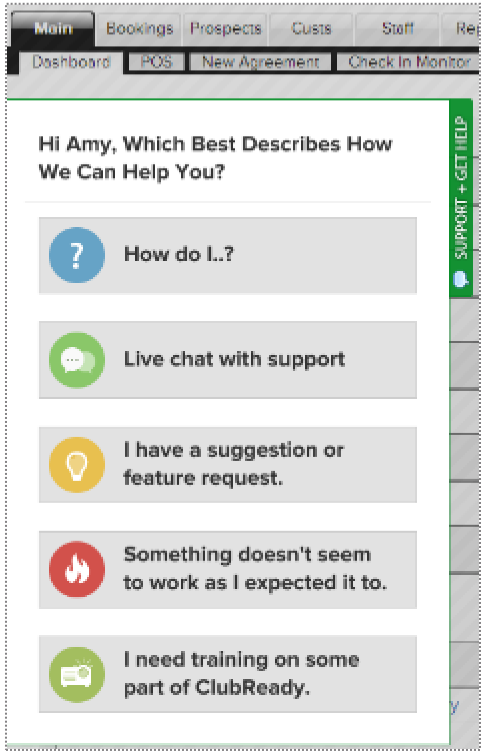
By clicking this button, you submit your information to the webinar organizer, who will use it to communicate with you regarding this event and their other services.

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

Need Help? Here's How to Get It

Submit a ticket

Post on the Help Forums

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

Use Live Chat

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

ClubReady