



ClubReady Foundations for Pure Barre

User Guide

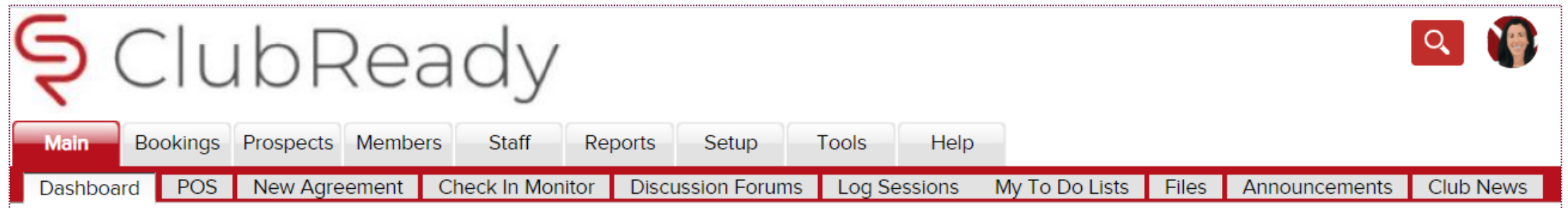
Table of Content

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



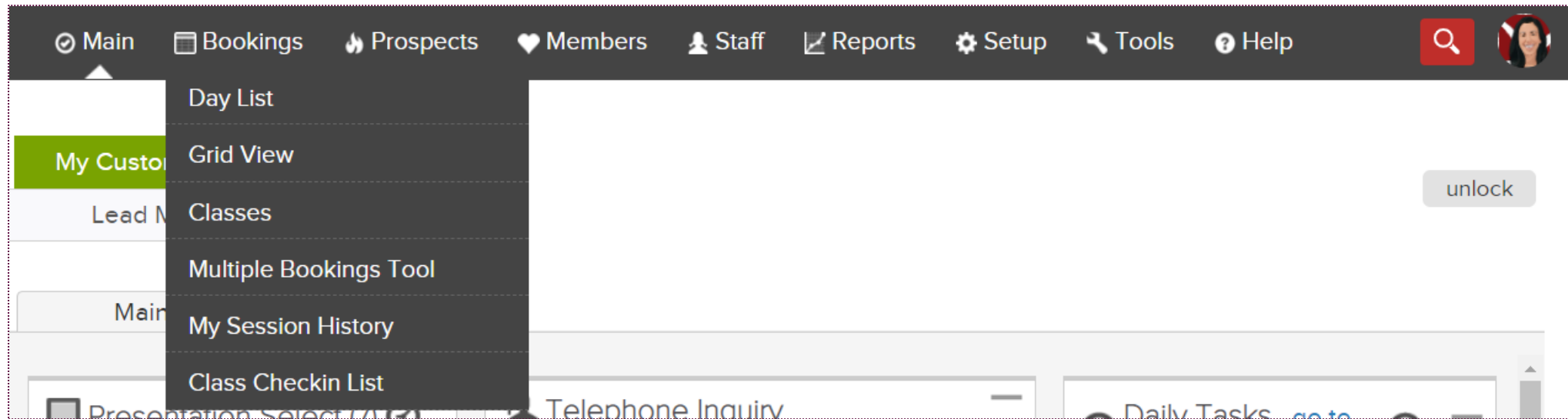
Menu & Navigation

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

○ Main

📅 Bookings

🔥 Prospects

♥ Members

👤 Staff

📊 Reports

⚙️ Setup

📖 Learn

🔍 Additional Filters

📌 PIN-OPEN

Lead Assigned To ▾

Lead Added ▾

All Lead Types ▾

All Contact Types ▾

All Genders ▾

Last Action on Lead ▾

Last Change to Lead Type ▾

Lead Has Amenity ▾

No Misc. Filter ▾

All Referral Types ▾

☰ Lead Lookup

My Saved Filters (1) ▾

Search By Name ▾

type name...

👤 4 Matches

[show lead assignments](#)

[show recent](#) | [reset all](#)

Awesome, Lady

Inc, Robert

Rowley, Brett

Testleifi, Justin

Tasks (3)

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:

Prospect Email Blast (ClubReady Sys

Purpose:

Membership Sales [system] ▾

📘 The selected email template contains a [content] email

B

I

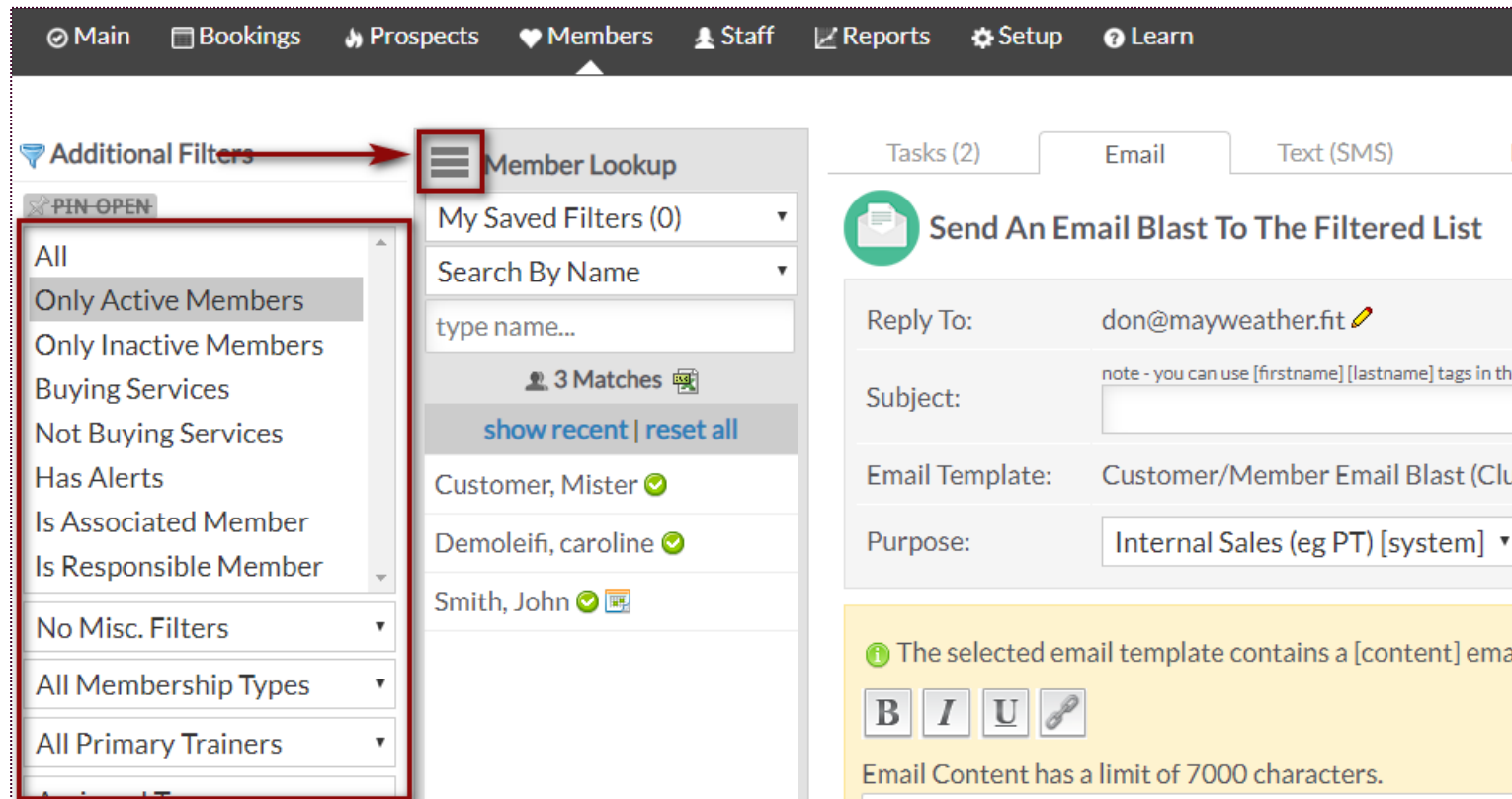
U

🔗

Email Content has a limit of 7000 characters.

Lookup Members

Members > Lookup



The screenshot displays the 'Members > Lookup' interface. At the top is a navigation bar with links: Main, Bookings, Prospects, Members, Staff, Reports, Setup, and Learn. Below this, the 'Additional Filters' section is highlighted with a red box and an arrow pointing to the 'Member Lookup' tab. The 'Additional Filters' dropdown menu is open, showing options like 'All', 'Only Active Members', 'Only Inactive Members', 'Buying Services', 'Not Buying Services', 'Has Alerts', 'Is Associated Member', 'Is Responsible Member', 'No Misc. Filters', 'All Membership Types', and 'All Primary Trainers'. The 'Member Lookup' panel shows 'My Saved Filters (0)', a 'Search By Name' dropdown, a search input field with the placeholder 'type name...', and a list of 3 matches: 'Customer, Mister', 'Demoleifi, caroline', and 'Smith, John'. To the right, the 'Send An Email Blast To The Filtered List' form is visible, with fields for 'Reply To' (don@mayweather.fit), 'Subject' (with a note about tags), 'Email Template' (Customer/Member Email Blast (Club)), and 'Purpose' (Internal Sales (eg PT) [system]). A yellow warning box at the bottom states: 'The selected email template contains a [content] email' and '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

No Sales Contacted Filter

All Contact Methods

search by name

Assigned

Unassigned

Page Size showing 7 of 7 matches

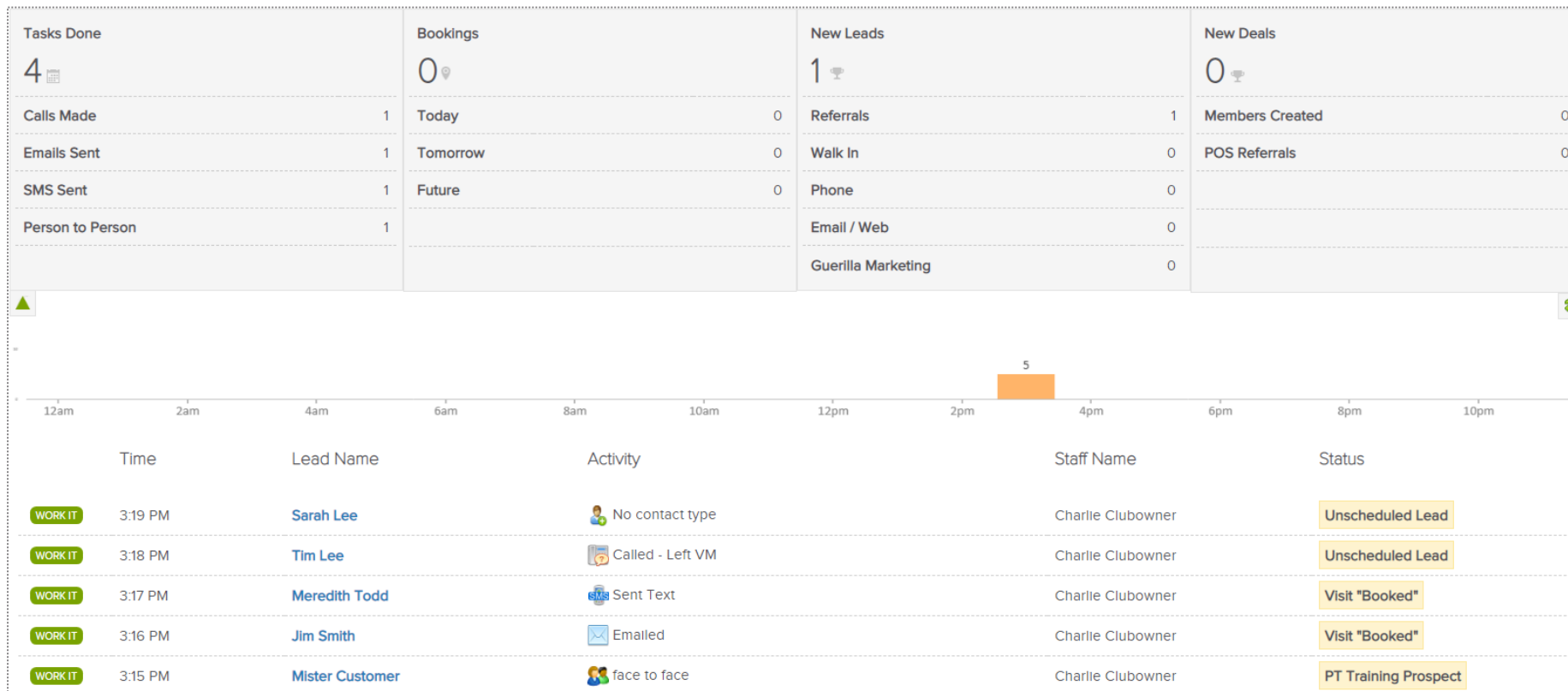
Lead Name	Lead Type	Referral Type	Contact Method	Entry Time	Contacts
WORK IT Jason Smith	Unscheduled Lead	Flyer	Telephone Inquiry	Added 4 days ago	✓ 1 contact
WORK IT Jon Martin	Visit "Booked"	Instagram	Telephone Inquiry	Added last month	✓ 1 contact

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

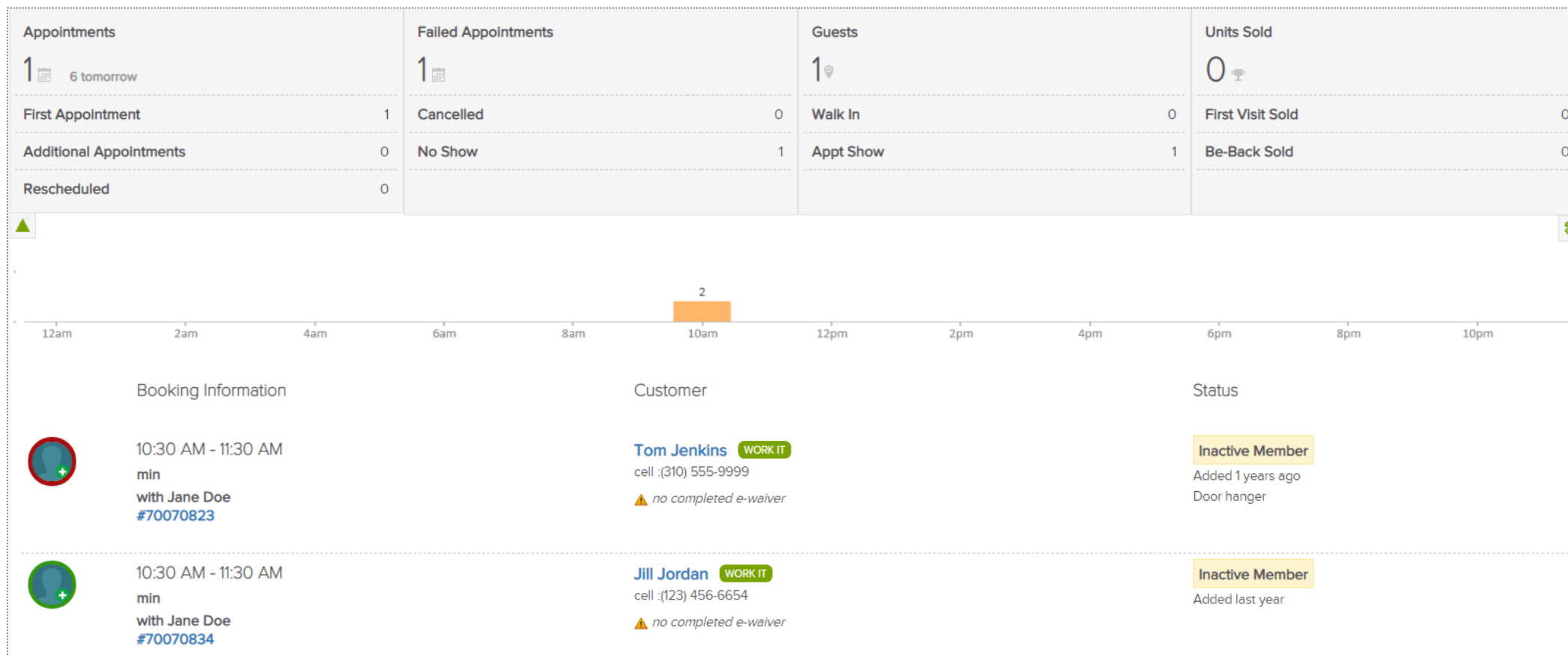


The **Activity** tab reflects current data or activity for a specific day. The report will display **Tasks Done**, **Bookings**, **New Leads** and **New Deals**. A time bar lets you know when are these activities happening throughout your club.



Lead Management Dashboard – Guest Log

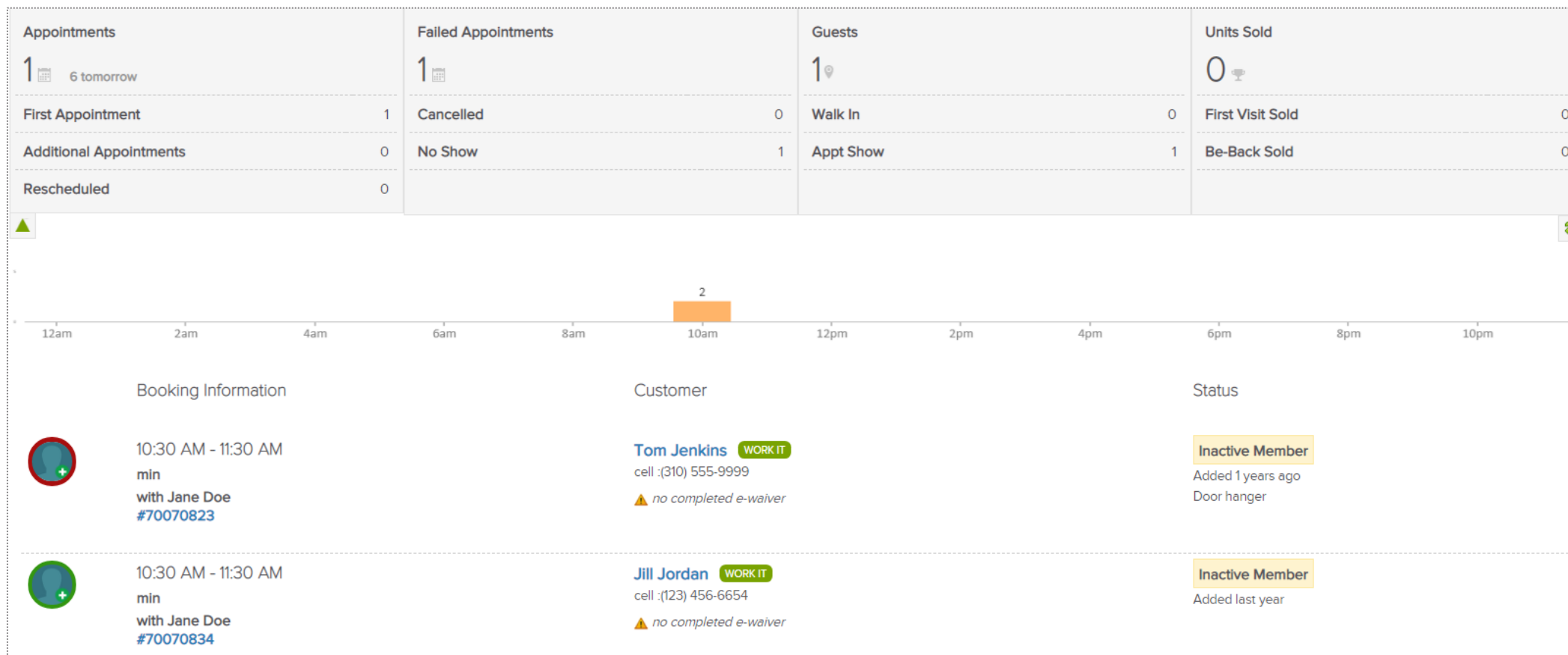
Main > Dashboard



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

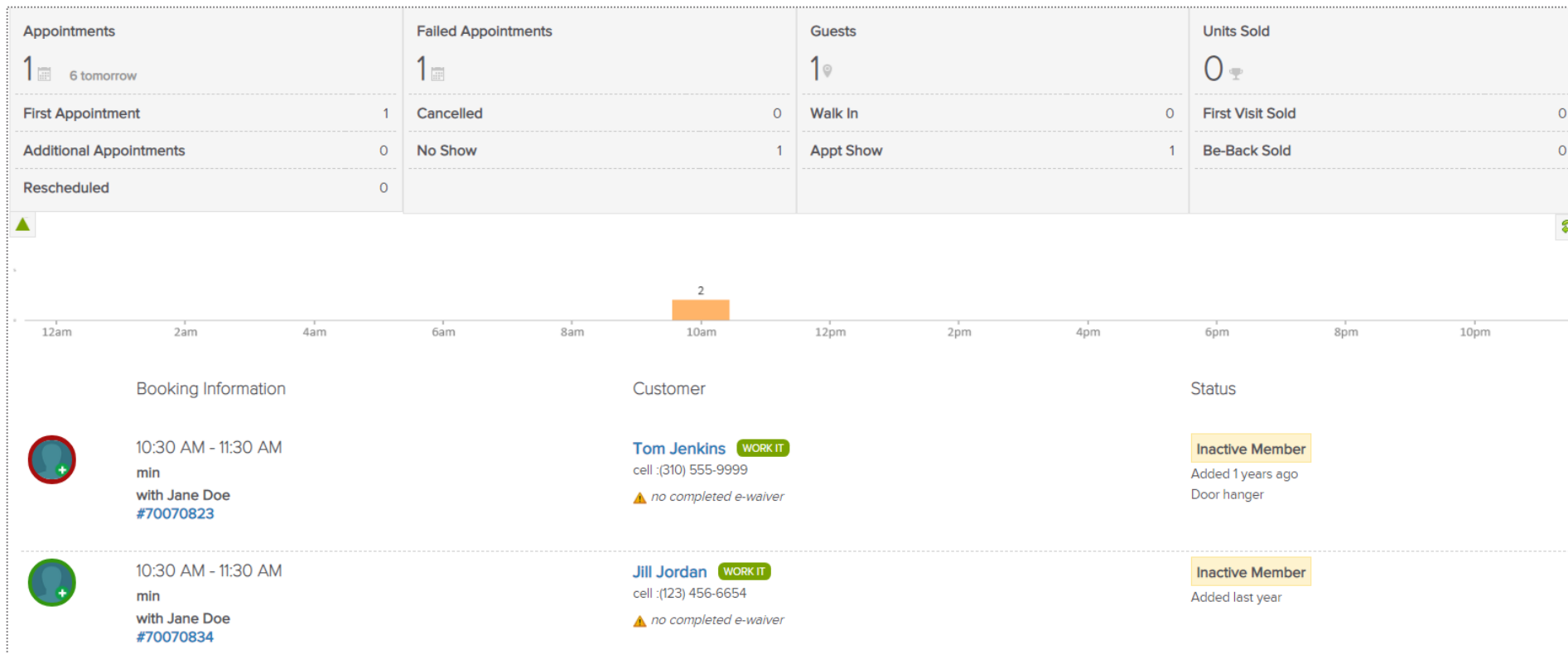
Main > Dashboard



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.




Waivers


Entering a Prospect – Sign a Waiver

Adding in a Prospect who will be taking a Class

☐ Presentation Select (1)

Only presentations enabled in [presentations setup](#) that also allow anonymous access show below. Click any to open

 [Liability Waiver](#)



Click on **Main > Dashboard**. To begin a presentation (Liability Waiver) from the Presentations widget, select the blue presentation title.

You can choose to begin a presentation from a tablet by downloading the following app:

ClubReady Presentation Viewer App -
<https://www.clubready.com/wiki/WK31559918315>

Entering a Prospect – Sign a Waiver

Adding in a Prospect who will be taking a Class

My Club Guest Register

Liability Waiver

Waiver of Liability

Your Information

First Name

Last Name

Gender

Select Gender

Email Address

ASSUMPTION OF RISK, WAIVER AND INDEMNITY. I, the client, acknowledge that I know, understand and appreciate the inherent risks of participating in aerobic and athletic activities. I know that these risks range from minor injuries such as muscle strains and sprains to significant problems such as knee injuries or broken bones to the rare catastrophic events such as heart attacks, paralysis and death. I hereby assert that I am voluntarily participating in the activities and that I fully assume the inherent risks of such participation.

I certify that (1) I possess a sufficient degree of physical fitness to participate in aerobics and physical activity; (2) I understand that I am to discontinue activity at any time I feel undue discomfort or stress; and (3) I will indicate below any health concerns that might affect my ability to participate in the activities and I will verbally inform the instructor immediately.

In consideration of being permitted to participate in the activities at, I hereby release (on behalf of myself, my family, my heirs and my assigns) the Club, their respective employees, agents, successors and assigns from liability for any and all claims involving injury, death, or property loss suffered by me or any person entering the Club as my guest including those injuries which result from ordinary negligence of the Club, Club Franchising, LLC and their respective employees, agents or sponsors. This includes incidents that occur while participating in the activities, while using the Club facilities, or while engaging in any activities incidental thereto, wherever, whenever, or however the same may occur.

I further agree to hold harmless, defend and indemnify the Club and from any and all claims (including ordinary negligence of Club, or their employees or agents) arising directly or indirectly from my participation in the activities. I further agree to pay all costs and attorneys' fees incurred by Club in investigating and defending a claim brought by me or on my behalf by my heirs, personal representatives or assigns, or by a third party.

Parent/Guardian: In exchange for Club allowing my minor child to use the Club, I agree to the Assumption of Risk, Waiver and Indemnity clause in this Agreement. I also agree to defend and indemnify Club, or its officers and employees to the fullest extent permitted by law for any claim brought by my minor child against them. I also promise to pay any financial obligation incurred by my minor child for any reason and acknowledge that the banking information provided is my account. I understand that any child of mine under the age of 16 must be accompanied by an adult at all times while in a location

Customer agrees and acknowledges that various aspects of Club's business are protected intellectual property belonging exclusively to club. This intellectual property shall include, but not be limited to, the distinctive nine-round workout will demonstrate to Customer, the distinctive appearance, layout, stations, and look and feel of the location Customer is invited to view and participate in, as well as any copyrights, trademarks, designs, logos, or trade dress related thereto. Customer acknowledges that club's business and franchising model depends on the protection and enforcement of club's intellectual property throughout the United States and other areas where it may offer and advertise services. As a result, and in further consideration of the services being offered to Customer by club and club's disclosure and demonstration of intellectual property to Customer, Customer agrees not to copy, duplicate, photograph, record, reproduce, distribute, republish, perform, display, post, transmit, sell, or make into derivative works or substantially similar works or formats, in any form or by any means, including, but not limited to, electronic, mechanical, photocopying, recording, or otherwise, club's intellectual property without the express, written permission of club

What is your goal?

☐ I agreed to the terms


Please sign here

NON
STOP

SIGNATURE 1

click to sign

A pop-up window will automatically display with the waiver for the prospect to sign. Once all fields have been entered and signatures taking, select **Submit**. The prospect will now be listed in ClubReady under the **Prospects** tab.


 pure barre®






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="radio"/> Male <input type="radio"/> Female
<input checked="" type="checkbox"/> include in duplicate search	
First Name <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Last Name <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Email Address (important) <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Cell Phone	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Home Phone	<input type="text"/>
Work Phone	<input type="text"/>
 Key Info Note  <i>(this is never visible to the prospect)</i>	<input type="text"/>
Referred by Customer	<input type="text"/> 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)

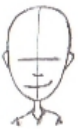
Bookings (0)

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

★ done today by you 0

by all the team 0

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

 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

Home number(123) 456-7890

Work numberUnknown

Select The Outcome Of The Call

enter details of call..

Internal Sales (eg PT)

Do not add a new call task

Log The Phone Call


Past Calls (1)Key Note (0)All Notes (9)Lead Type History


Last Calla few seconds ago by Jacqueline Armstrong


Last Talked Witha few seconds ago by Jacqueline Armstrong

Calls Last 30 Daysnone

☐ hide any with no phone conversation

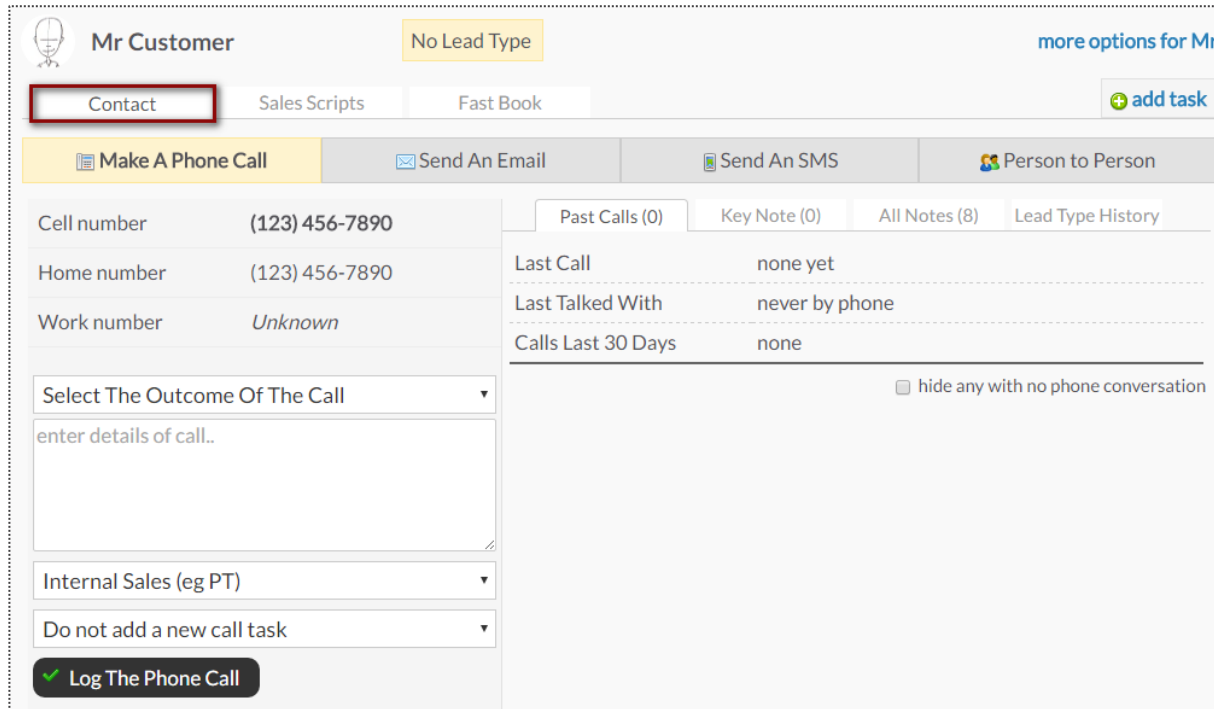
 Jacqueline Armstrong a few seconds ago (1/3/2017)

 talked - positive conversation

 Made a booking!

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

Work It - Contact



The screenshot shows the 'Contact' tab for a contact named 'Mr Customer'. The interface includes a header with the contact's name, a 'No Lead Type' label, and a 'more options for Mr' link. Below the header are tabs for 'Contact' (highlighted with a red box), 'Sales Scripts', and 'Fast Book', along with an 'add task' button. A row of action buttons includes 'Make A Phone Call' (highlighted), 'Send An Email', 'Send An SMS', and 'Person to Person'. The main content area is divided into two sections. The left section contains contact details: 'Cell number (123) 456-7890', 'Home number (123) 456-7890', and 'Work number Unknown'. Below these are dropdown menus for 'Select The Outcome Of The Call', 'Internal Sales (eg PT)', and 'Do not add a new call task', followed by a 'Log The Phone Call' button. The right section contains a summary of call history: 'Past Calls (0)', 'Key Note (0)', 'All Notes (8)', and 'Lead Type History'. It lists 'Last Call' as 'none yet', 'Last Talked With' as 'never by phone', and 'Calls Last 30 Days' as 'none'. A checkbox for 'hide any with no phone conversation' is also present.

Cell number	(123) 456-7890
Home number	(123) 456-7890
Work number	Unknown

Select The Outcome Of The Call ▼
enter details of call..

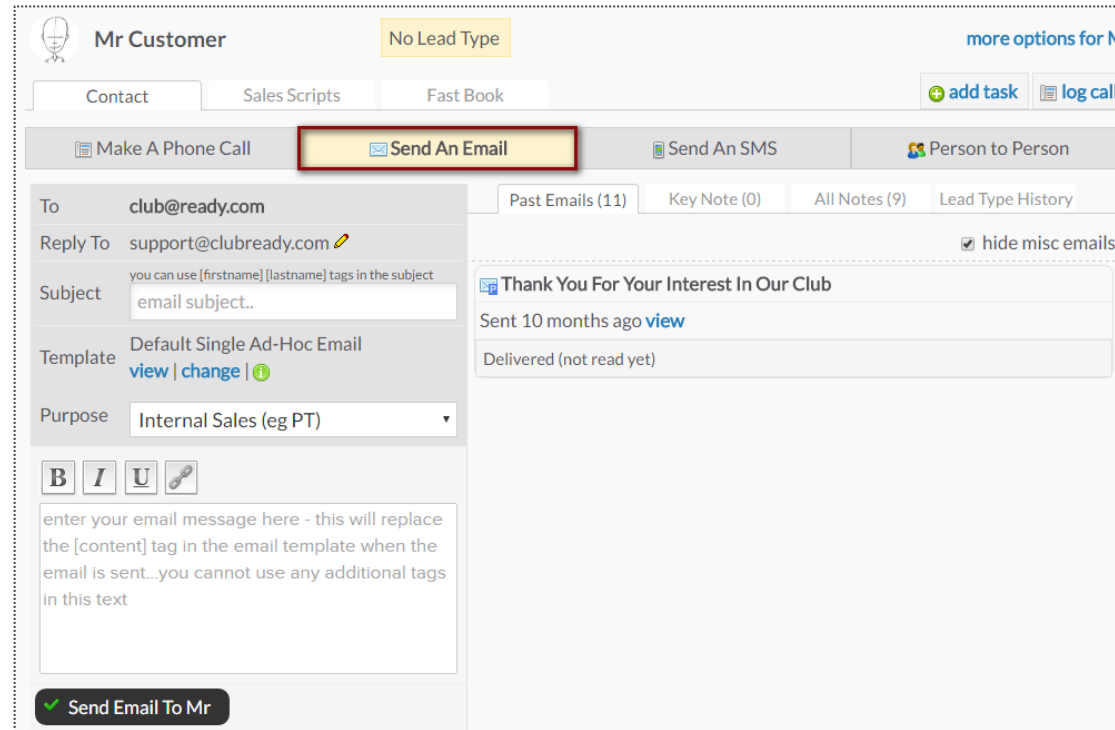
Internal Sales (eg PT) ▼
Do not add a new call task ▼
Log The Phone Call

Past Calls (0)	Key Note (0)	All Notes (8)	Lead Type History
Last Call	none yet		
Last Talked With	never by phone		
Calls Last 30 Days	none		

☐ hide any with no phone conversation

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.

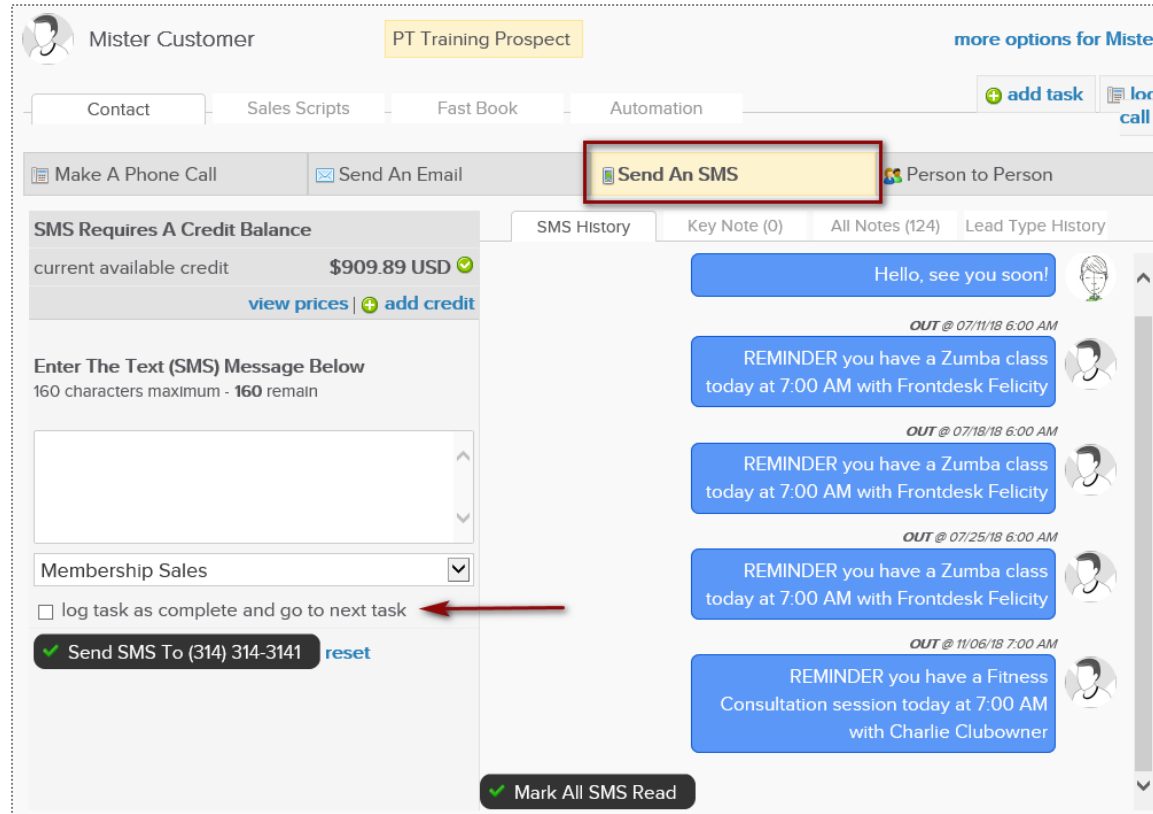
Work It – Emails



The screenshot shows a user interface for sending an email to a client named 'Mr Customer'. The interface includes a header with the client's name, a 'No Lead Type' label, and a 'more options for Mr Customer' link. Below the header are tabs for 'Contact', 'Sales Scripts', and 'Fast Book'. A 'Send An Email' tab is highlighted with a red box. To the right of the tabs are buttons for '+ add task' and 'log call'. Below the tabs are buttons for 'Make A Phone Call', 'Send An SMS', and 'Person to Person'. The 'Send An Email' tab is active, showing a form with fields for '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)). Below the form is a text area for the email message, with a placeholder text: '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'. At the bottom of the form is a 'Send Email To Mr' button. To the right of the form is a sidebar with a 'hide misc emails' checkbox and a list of email history items, including 'Thank You For Your Interest In Our Club' and 'Sent 10 months ago view'.

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

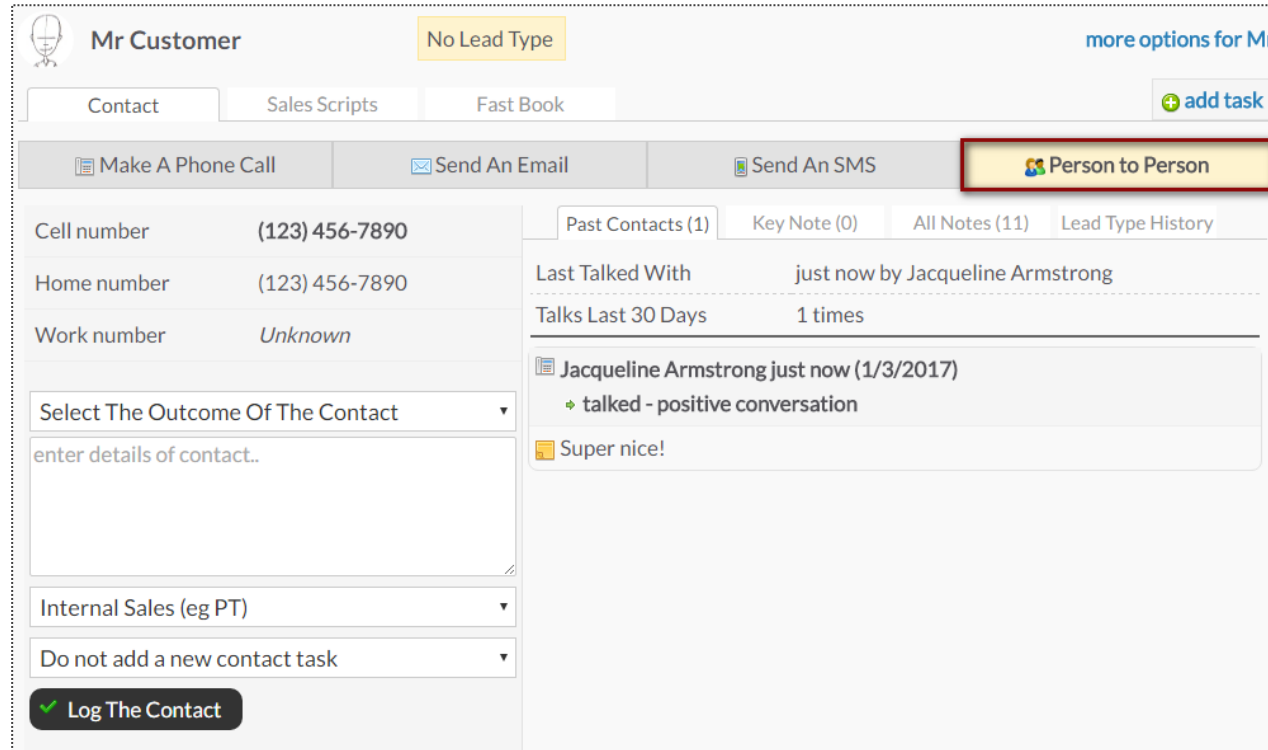
REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity 

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 customer named 'Mr Customer'. At the top, there's a header with the customer's name, a 'No Lead Type' label, and a 'more options for Mr' link. Below this is a navigation bar with tabs for 'Contact', 'Sales Scripts', and 'Fast Book', along with an 'add task' button. A secondary bar contains action buttons: 'Make A Phone Call', 'Send An Email', 'Send An SMS', and the 'Person to Person' tab, which is highlighted with a red border. The main content area is split into two columns. The left column shows contact details: '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..', another dropdown for 'Internal Sales (eg PT)', and a third dropdown for 'Do not add a new contact task'. At the bottom of this column is a 'Log The Contact' button. 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'. Below this is a list of interactions, including 'Jacqueline Armstrong just now (1/3/2017)' with a note 'talked - positive conversation' and a sticky note 'Super nice!'.

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
Home number (123) 456-7890
Work number Unknown

Select The Outcome Of The Contact
enter details of contact..

Internal Sales (eg PT)
Do not add a new contact task

Log The Contact

Past Contacts (1) Key Note (0) All Notes (11) Lead Type History


Last Talked With just now by Jacqueline Armstrong

Talks Last 30 Days 1 times

Jacqueline Armstrong just now (1/3/2017)
talked - positive conversation
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

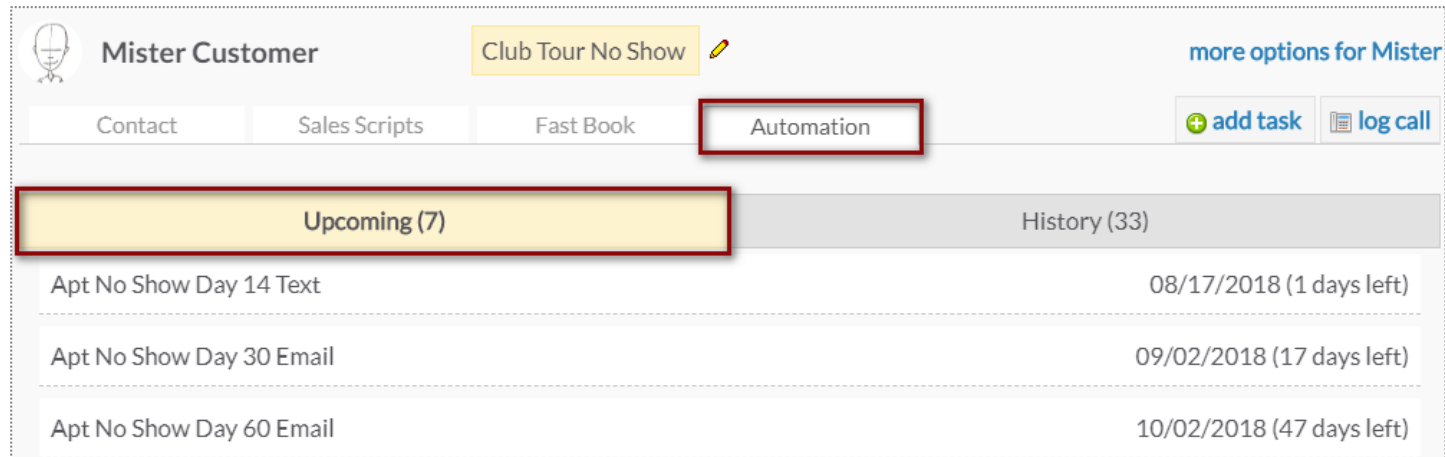
Tuesday, January 10 [choose a different date](#)

☒ 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

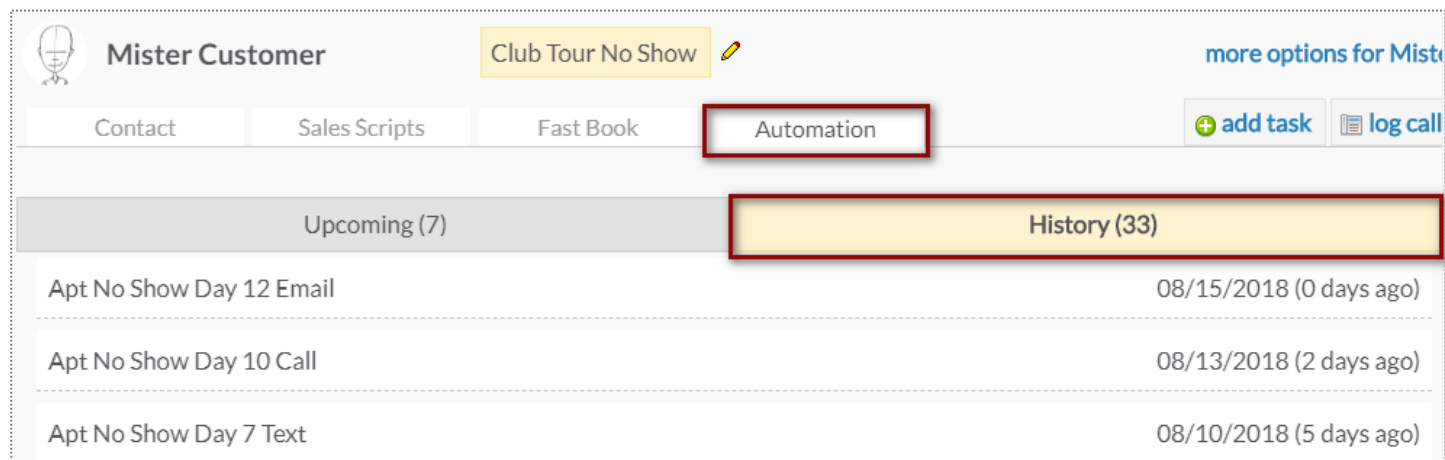


The screenshot shows the 'Automation' tab for 'Mister Customer'. The 'Upcoming (7)' tab is selected and highlighted in yellow. Below the tabs, three automation rules are listed:

Automation Rule	Due Date
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.



The screenshot shows the 'Automation' tab for 'Mister Customer'. The 'History (33)' tab is selected and highlighted in yellow. Below the tabs, three completed automation rules are listed:

Automation Rule	Completed Date
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"/> (if blank announcement will start immediately)
End Date	4/2/2015 (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)
Include a Poll? (the poll question should be in the announcement title or text)	<input type="radio"/> Yes <input checked="" type="radio"/> No
The Announcement 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	<div>TITLE B I U     </div> <p>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+</p> <div></div>
Include Acknowledgement Text / Checkbox 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.	<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 word 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 New Discussion

Setup > Communication > Discussion Categories

Add A New Discussion Category

Name of New Category *(new additions will initially be set to disabled)*

eg General Chat

Category Description (Optional)


☒ Customers Can View / Participate In Category

☒ Trainers Can View / Participate In Category


Add The New Category



Discussion categories allow your customers and/or staff to hold conversations in the form of posed messages. When creating a new discussion category, add the name and choose if customer and/or trainers can participate in this forum.

View Discussions: Staff & Clients

 **Community Discussion**


[Discussion Home](#) > What is your favorite workout?




Discussion Subjects In What is your favorite workout?	Last Post	Replies	Views
 Treadmill! 	By JacquelineCR Friday, November 11, 2016 10:15 AM	0	7

Staff View – **Reports > Community.**


Trainers can participate by clicking on the Add New Discussion button in the discussion forum they select.


 **Community Discussion**

 **My Discussion Settings**

☒ Show My Photo
☐ Don't Show My Photo

☐ Use My Real Name In Posts
☒ Use My Username [edit](#)

 **outside workouts** 2 Discussions
Post your Outdoor workouts

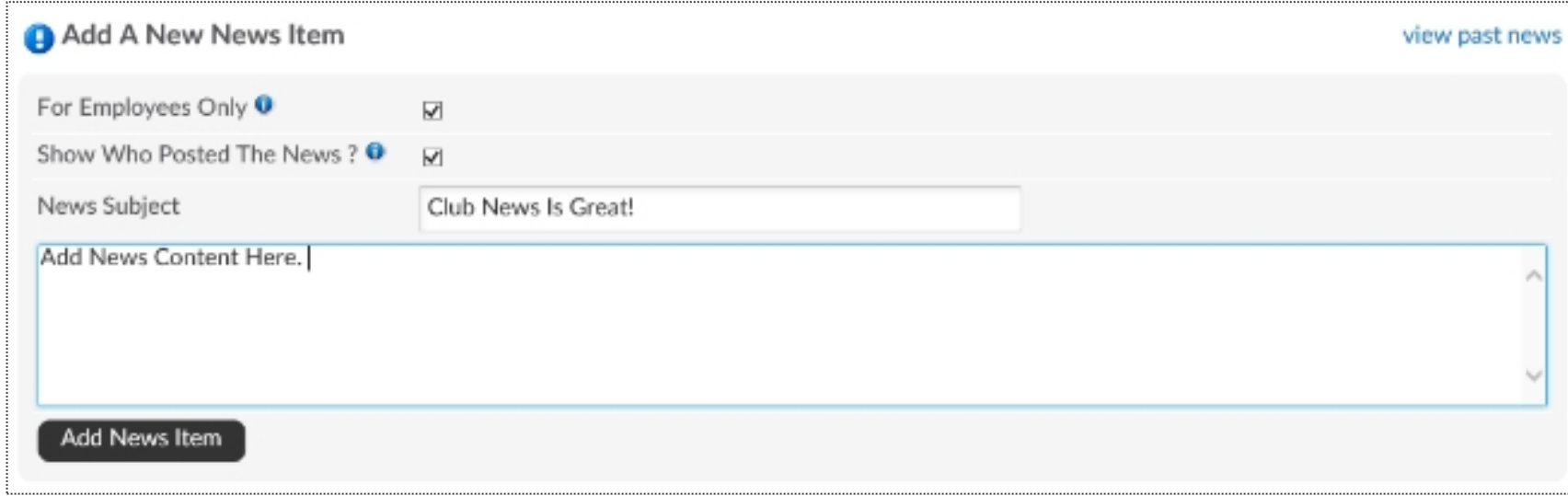
 **Favorite Post Workout Meal** 2 Discussions

Client View – **Discuss > Community Discussion.**

Clients can view all available forum and select their discussion settings. To add a new discussion, they need to select on the forum link and Add New Discussion.

Create Club News

Main > Club News



The screenshot shows a web form titled "Add A New News Item" with a "view past news" link in the top right. The form contains three sections: "For Employees Only" with a checked checkbox, "Show Who Posted The News ?" with a checked checkbox, and a "News Subject" field containing the text "Club News Is Great!". Below these is a large text area labeled "Add News Content Here." with a vertical scrollbar. At the bottom left is a dark button labeled "Add News Item".

To add a new club news item, click on the link Add New News Item which is located in the far right of the Club News tab.

For Employees Only – if checked, members will not see the news. If you are creating a news post that will be visible to members, they will be able to view this on their wellness dashboard.

Show Who Posted The News – will show the employee's name and photo.

News Subject – type the subject line and content you want to share. To complete, click on Add News Item.


View Club News: Staff & Clients

Main > Club News

Past News Items add new news item			
Date	News Item - Click To Read	For Employees Only?	Delete
10/10/2014	Mercy's Class 10/14/2014 10:00 AM CANCELLED 		
8/20/2014	New News 		
6/4/2014	Hola amigo! 		
6/2/2014	Hello there. 		

Staff View – Main > Reports.

Trainers can view news item as well as edit them and delete (if they have the permissions).

! Latest News	
11/11/2016 - Gym Expansion!	
9/6/2016 - Fundamentals of Yoga 9/6/2016 9:00 AM CANCELLED	
8/24/2016 - Bathroom Reno	
 view all news	

Client View – Home > Overview

Clients can view all available news items. To view past news they can select Home > Past News. Clicking the news link will show the content.

Create A File Folder

Setup > General > File Folders

Create A New File Folder

Folder Name

folder name

Choose A Parent Folder.

Root Level (No Parent) ▼

Select Who can See The Folder.

Select Who Should See It ▼

Create New File Folder

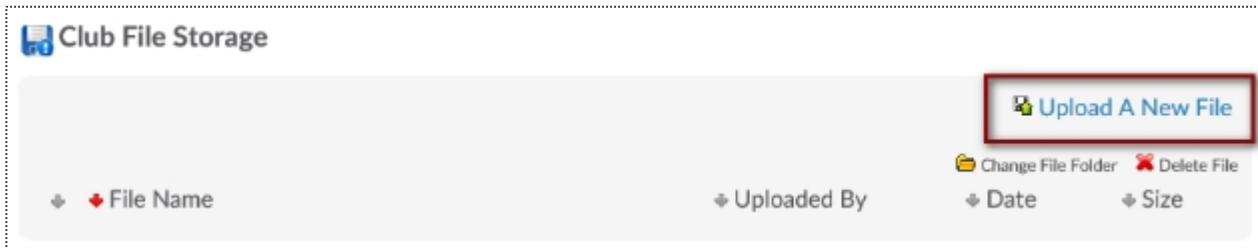
Folder Name: Type in the desired name for the file folder.

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



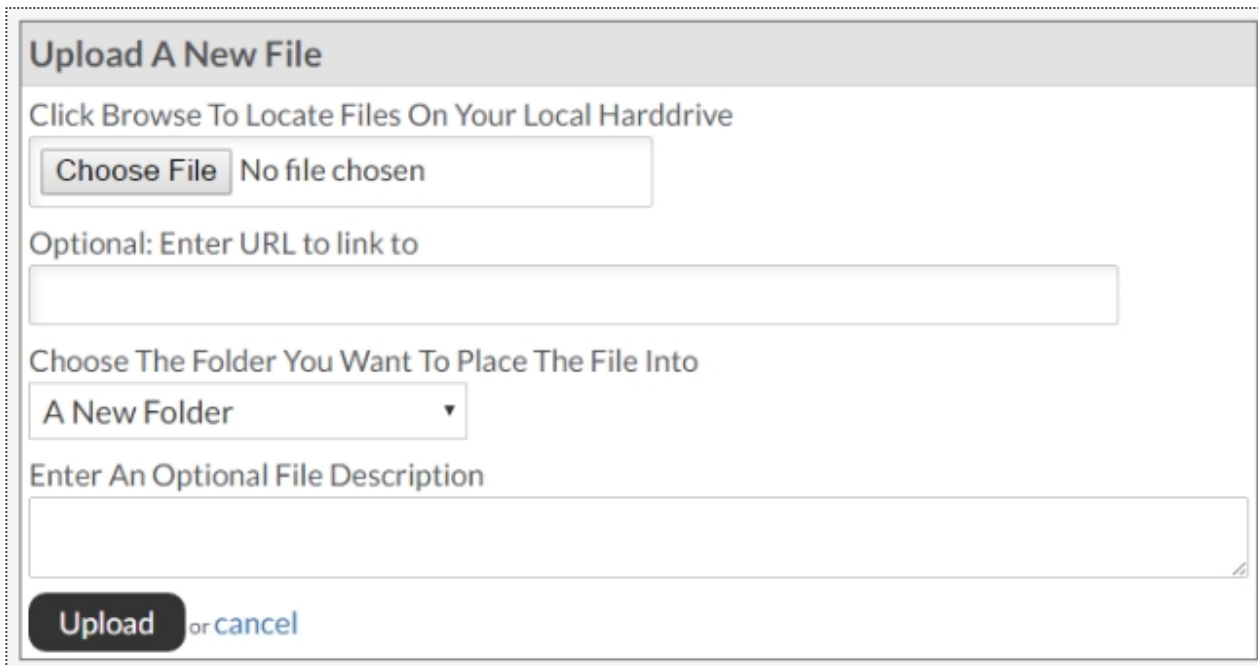
Club File Storage

[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	


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.


Important Club Files

 [Yummy Recipe](#)

 [Black Friday Special_\[1\]11-24-2015.jpg](#)

 [LetsDoThis.png](#)

 [Gym FAQ](#)

 [Employee_Handbook.pdf](#)



Email Templates

Setup > Communications > Email Templates

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

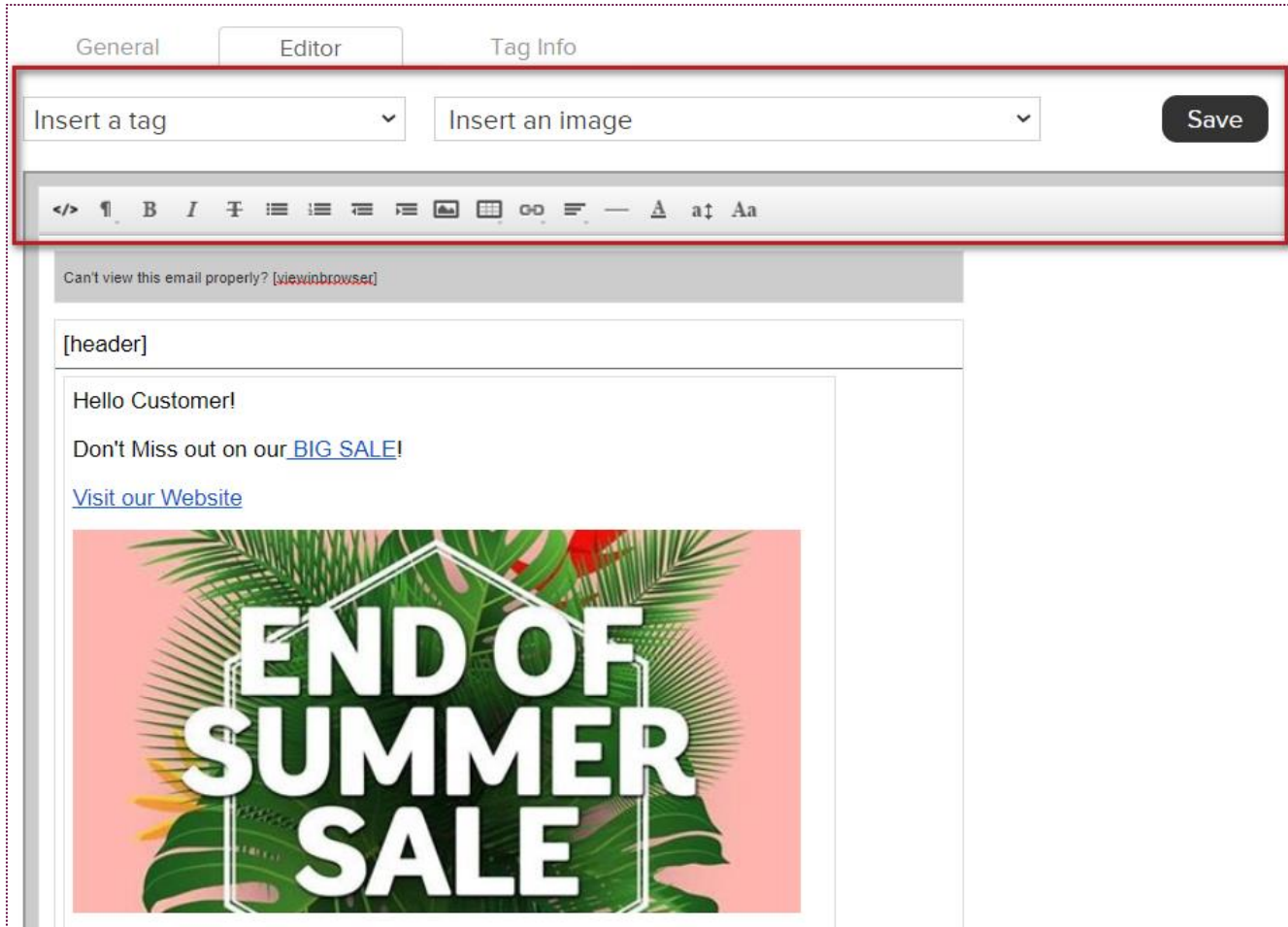
Create a blank template, Cloning an existing template, Cloning system default template or Clone a newsletter template

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



Email Templates

Setup > Communications > Email Templates



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

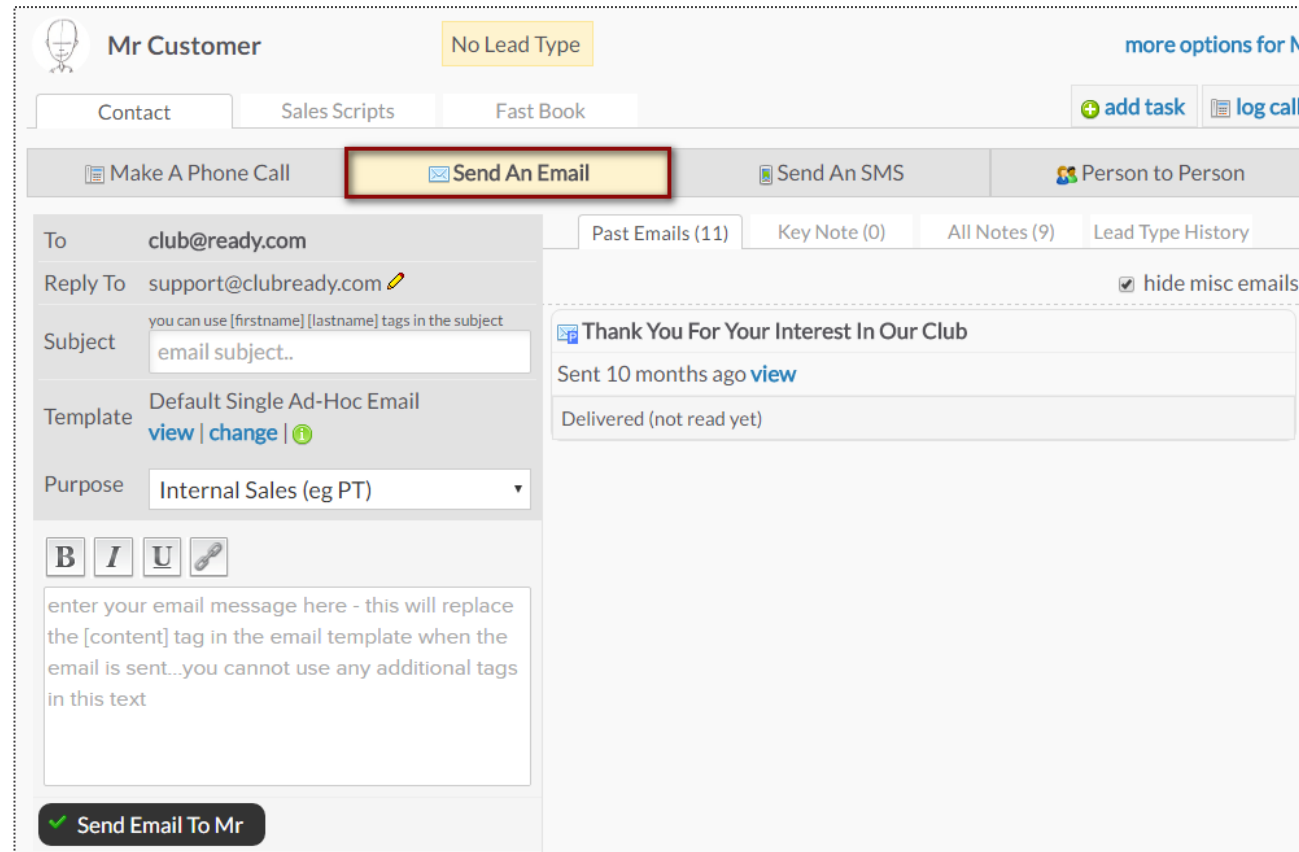
Choose from **Inserting a Tag** or **Inserting an image** to display for your users.

NOTE:

- Avoid using copy + paste from Microsoft Word.

Individual Emails

Prospect/Member Account > Work It

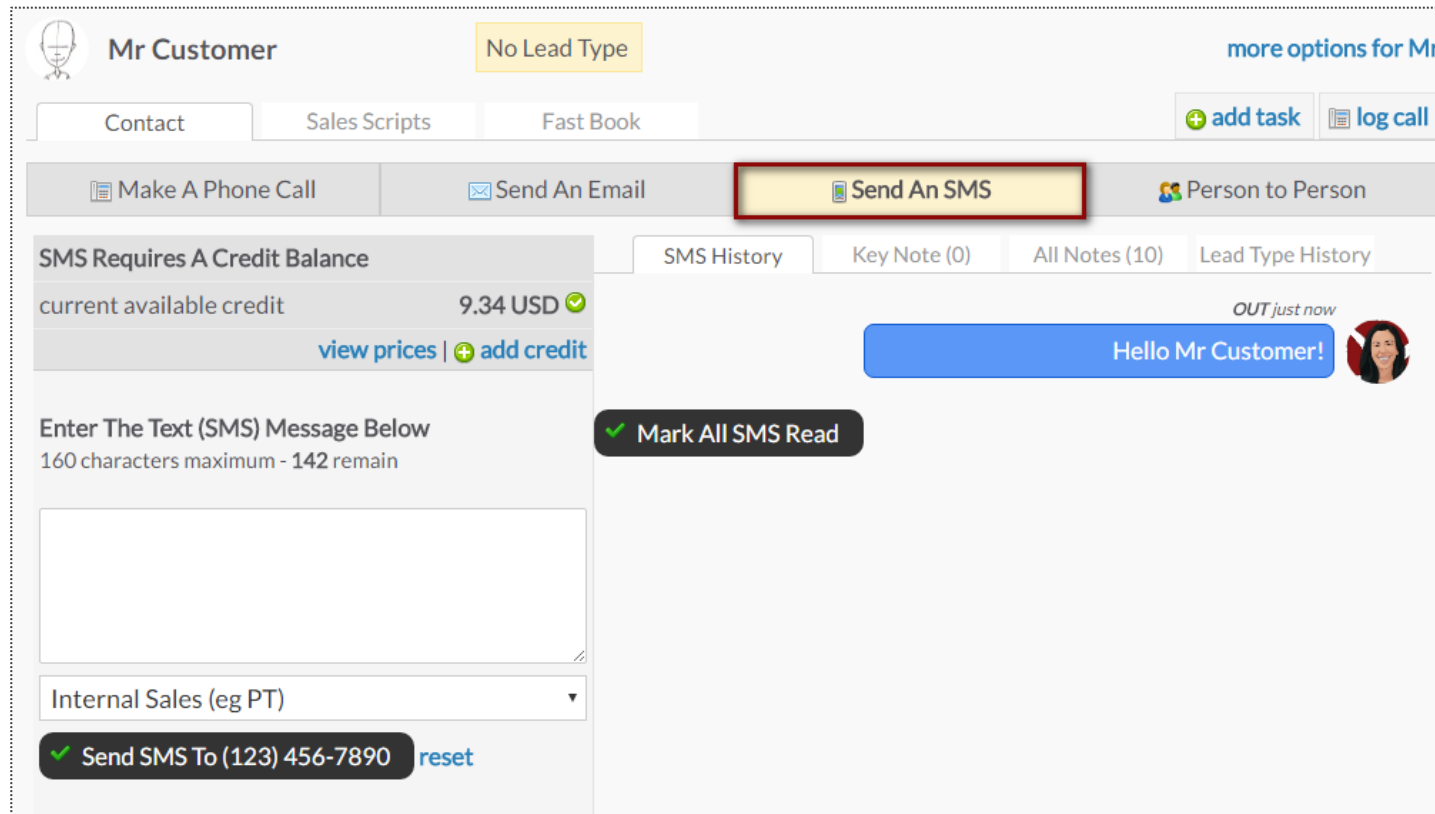


The screenshot shows a web interface for managing a prospect/member account. At the top, there's a header with a profile icon, the name 'Mr Customer', a 'No Lead Type' badge, and a 'more options for M' link. Below this is a navigation bar with tabs for 'Contact', 'Sales Scripts', and 'Fast Book', along with '+ add task' and 'log call' buttons. A secondary bar contains 'Make A Phone Call', 'Send An Email' (highlighted with a red box), 'Send An SMS', and 'Person to Person'. The main area is split into two columns. The left column contains fields for 'To' (club@ready.com), 'Reply To' (support@clubready.com), 'Subject' (with a placeholder for tags), 'Template' (Default Single Ad-Hoc Email with view/change/info links), and 'Purpose' (Internal Sales (eg PT)). Below these are formatting icons (B, I, U, link) and a text area with instructions. A 'Send Email To Mr' button is at the bottom. The right column has tabs for 'Past Emails (11)', 'Key Note (0)', 'All Notes (9)', and 'Lead Type History', a 'hide misc emails' checkbox, and a list of email history entries, including one titled 'Thank You For Your Interest In Our Club' sent 10 months ago.

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

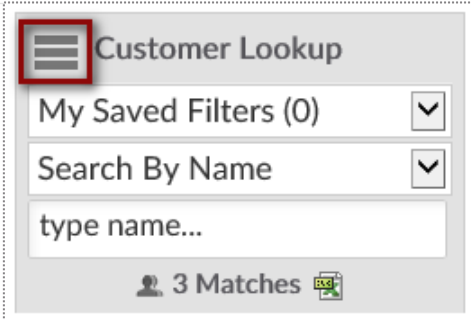
Prospect/Member Account > Work It



The screenshot shows a user interface for sending an SMS to a client named 'Mr Customer'. At the top, there's a header with the customer's name, a 'No Lead Type' tag, and a 'more options for Mr' link. Below this is a navigation bar with tabs for 'Contact', 'Sales Scripts', and 'Fast Book', along with 'add task' and 'log call' buttons. A secondary bar contains 'Make A Phone Call', 'Send An Email', 'Send An SMS' (highlighted with a red box), and 'Person to Person'. The main content area is divided into two columns. The left column shows the 'SMS Requires A Credit Balance' section with a current available credit of 9.34 USD, a 'view prices' link, and an 'add credit' button. Below this is a text input field for the message, a dropdown menu for 'Internal Sales (eg PT)', and a 'Send SMS To (123) 456-7890' button with a 'reset' link. The right column features tabs for 'SMS History', 'Key Note (0)', 'All Notes (10)', and 'Lead Type History'. It also displays a status 'OUT just now', a blue button saying 'Hello Mr Customer!' with a profile picture, and a 'Mark All SMS Read' button.

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: 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 

 Now  In 2 hrs  In 4 hrs  Schedule It For Later Date

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:

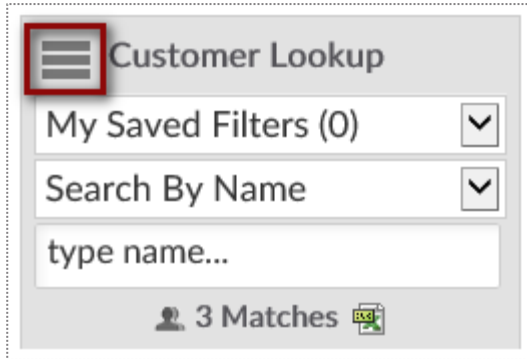
Save this content text to use again later - If you are going to send this out on a regular basis.

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

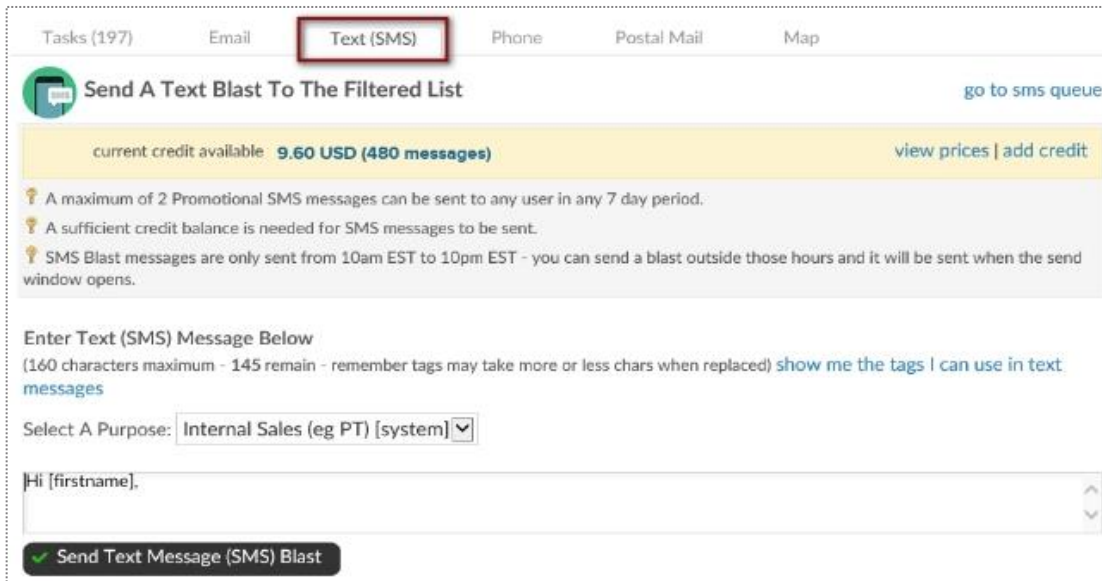
Prospects/Members > Text (SMS)



A sidebar titled "Customer Lookup" with a red box around a three-bar menu icon. Below the title is a dropdown menu labeled "My Saved Filters (0)". Underneath is a search box labeled "Search By Name" with a dropdown arrow and the placeholder text "type name...". At the bottom, it shows "3 Matches" with a person icon and a download 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 main interface for sending a text blast. At the top, there's a navigation bar with tabs: "Tasks (197)", "Email", "Text (SMS)" (highlighted with a red box), "Phone", "Postal Mail", and "Map". Below the tabs 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 links for "view prices" and "add credit". Below this are three informational icons and text: "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". Below this is a "Select A Purpose:" dropdown menu with "Internal Sales (eg PT) [system]" selected. A text input field contains "Hi [firstname],". At the bottom is a green button labeled "Send Text Message (SMS) Blast".

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 ▾

 Kill this Blast

☐ 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>	<div>Yours In Health And Wellness ClubReady Fitness</div>
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.



Members Weekly Email

Setup > Communications > Communication Settings

Customers Weekly Email

ClubReady can send your active Customers a weekly email / newsletter. You can design the look, branding and content to be whatever you want using email HTML templates. To set the mail template that is used for weekly emails go to [system emails setup](#) and adjust the email settings for weekly emails. Mail tags exist that enable you to make this email a rich source of information including info on bookings, nutrition tracking and so on.;

Weekly Emails Active? ⓘ	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Day of Week Email Is Sent ⓘ	Monday ▾
Weekly Email Subject Line	<input type="text" value="Your Weekly Fitness Update"/> <i>eg Your Weekly Fitness Update</i>


Weekly Emails Active? - select this check-box if you want to activate weekly fitness email tips.

Day of Week Email Is Sent - select the day you want the fitness email to be sent





Weekly Email Subject Line - you can change the title of the weekly fitness email

System Emails

Setup > Communications > System Emails

 Default New Prospect Email **ENABLED**

This is the default email setting when adding new prospects. Each [prospect type](#) can either send no email, use these defaults or have their own settings. If no prospect type is defined then these default settings are used. If a default prospect type is defined then the setting for that prospect type will be used.

Email Subject	<input type="text" value="Thank You For Your Interest In Our Club"/>
Default Email Reply To Address	<input type="text" value="yourclubinfo@com.com"/>
Email And Reply To Address Options <small>(default will be used if other options are not possible due to lack of email address etc)</small>	<div><input checked="" type="radio"/> Always send from default from address</div> <div><input type="radio"/> Send from assigned sales consultant</div> <div><input type="radio"/> Send from default but cc assigned sales consultant</div>
<div> Any template used by this email type must contain the following email tags [unsubscribe] - only templates that contain these mail tags will shown in the drop down of available email templates below</div>	
Emails Use This Email Template view add new	<input type="text" value="New Prospect Email [System Default]"/>
Optional Email Attachment	<input type="text" value="No Attachment"/> 
<div> Update This Email Type</div>	
<div><input type="text" value="manager@clubready.com"/><div> Send A Test Email</div></div>	

System emails are the type of emails that ClubReady sends (mostly automatically) as part of the day to day operation of a club.

This allows you to have full control over the branding of all emails that are sent.

From the system email settings screen you are able to adjust the following:

Email Subject
Default Email Reply To Address
Email And Reply To Address Options
Required template tags
Emails Use This Email Template
Optional Email Attachment



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
☐ include in duplicate search

Last Name REQ Customer
☐ include in duplicate search

Gender REQ ☒ MALE ☐ FEMALE
☐ include in duplicate search

Email REQ customer@cp.com
☐ include in duplicate search

Cell Phone REQ 85512147946

Home Phone

Work Phone
☐ 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.

Agreement Classification: Post Date Agreement

Select Plan > Adjust Pricing & Pay Dates



The screenshot shows a web form titled "Agreement Classification". In the top right corner, there is a link "Minimize Agreement Classification" and a close icon. The form contains two main fields: "Start Date" with a text input showing "3/29/2019" and "Select Classification" with a dropdown menu. The dropdown menu is open, showing four options: "New" (highlighted in blue), "Upgrade", "Downgrade", and "Renewal". Two red arrows point from the right towards the "Start Date" input and the "Select Classification" dropdown.

Agreement Classification - You have the ability to mark the current agreement as either a **New**, **Downgrade**, **Upgrade** or **Renewal** agreement. From here, you are able to adjust the **Start Date** if it is different from the date the agreement is written up. For example, you may start a renewal agreement for a member in the future while allowing their current agreement to expire.



Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup

minimize installment list

\$

Update All 6 Installment Prices

# 1	<div>Down</div>	\$ 50	11/10/2017
# 2	<div>Draft</div>	\$ 50	12/10/2017
# 3	<div>Draft</div>	\$ 50	1/10/2018
# 4	<div>Draft</div>	\$ 50	2/10/2018
# 5	<div>Draft</div>	\$ 50	3/10/2018
# 6	<div>Draft</div>	\$ 50	4/10/2018

Auto-Renew Evergreen

explain

Yes

No

(Basic Membership Plan) At \$ 50

Annual Enhancement Fee

Yes

No

\$ 50

on 5/10/2018

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

✓ Apply Discount

Reset Discount

# 1	Down	\$ 29.99 + tax	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 ✓		\$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

✓ Apply Discount

Reset Discount

# 1	Down	\$ 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



The screenshot shows a web form with a light gray background. In the top right corner, there is a small icon of a person wearing a hard hat. The form contains three sections: 'Responsible Staff' with a dropdown menu labeled 'Choose staff for sale'; 'Assign Staff' with a dropdown menu labeled 'Choose staff member'; and 'Optional Note' with a text area labeled 'Enter an optional note here....'. At the bottom of the form, there is a dark button with a blue icon and the text '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 sponsors, 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 IT SHALL 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



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](#)

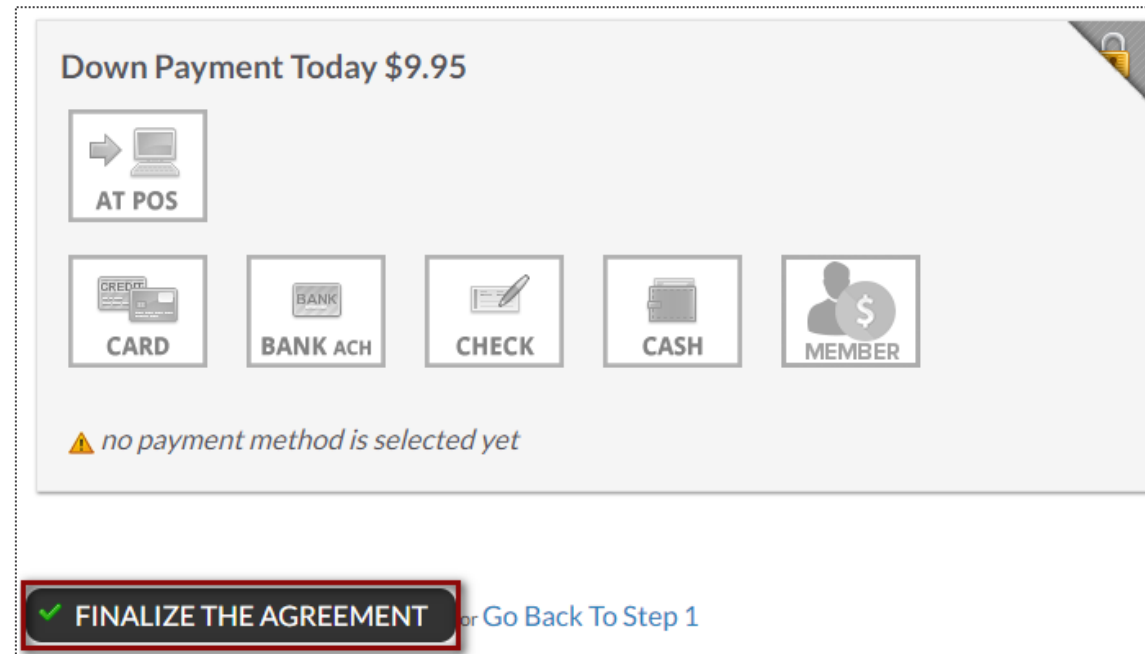
Sign here!



[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 \$

Due Date

Change Package Type


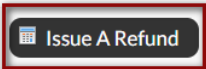
Optional Note

or [cancel](#)

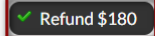
Selecting the option **Adjust The Invoice Details** will update the screen to display all options you can adjust for this one invoice. Make the desired changes to the invoice. Click the **Update** button to save changes.

Refund an Invoice

Member > Billing > Invoices > Select Invoice ID #> Issue A Refund

Invoice Detail (#76811337) PAID 	
Name	Mister Customer
Amount	\$180.00 
Payment Due Date	5/11/2017
Detail	30Min Personal Training 4xMonth (monthly)

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




#76811337 Refund Paid Invoice Mister Customer	
\$180.00	
30Min Personal Training 4xMonth (monthly)	
Paid 5/11/2017 By Cash	
Customer Refund	
Refund Method	Select
Send Notification Email	Select
Partial Refund	Cash Written Check Client Credit Balance
Status of any associated bookings / credits	
Past bookings	0
Future bookings	0
Booking Credits	4 <i>credits will be automatically deleted</i>
Optional Note	
 or cancel	

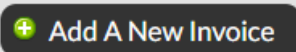
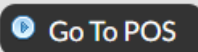
From this detail screen, select the desired form of payment to be refunded back to the member. Options will be **CC/Bank ACH on file, Written Check, Cash, or Client Credit Balance**. You may also choose to send an email notification or leave a note.

To finalize, click the **Refund** button.




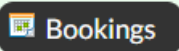
Adding a New Invoice

Member > Billing > Invoices



14 Invoices

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.



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.

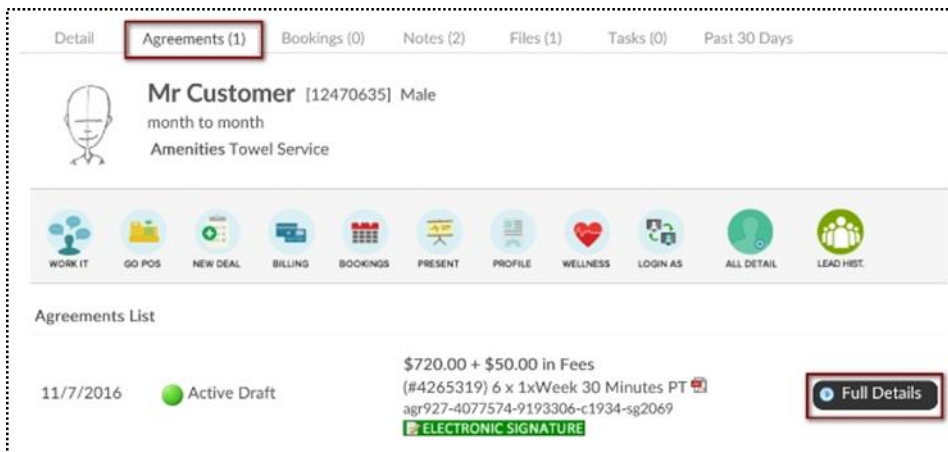
Freeze Type	<input checked="" type="radio"/> Freeze A Specific Number Of Months <input type="radio"/> Freeze Indefinitely (Disabled In Setup)	
	<input type="text" value="1"/>	months
Start Freeze	<input checked="" type="radio"/> Immediately <input type="radio"/> On A Future Date	
Charge A One Time Freeze Fee	\$ <input type="text"/>	
Monthly Freeze Invoice At	\$ <input type="text"/>	
Email A Notification Of Freeze?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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		
Implement Agreement Freeze		

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

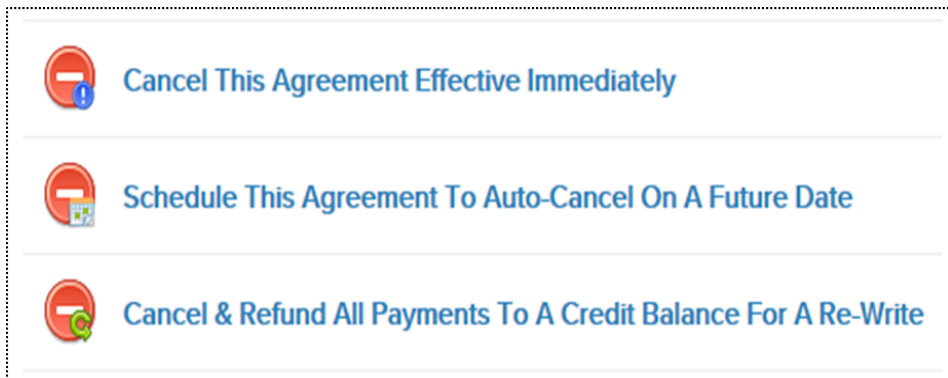
WORK IT GO POS NEW DEAL BILLING BOOKINGS PRESENT PROFILE WELLNESS LOGIN AS ALL DETAIL LEAD HIST.


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



 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

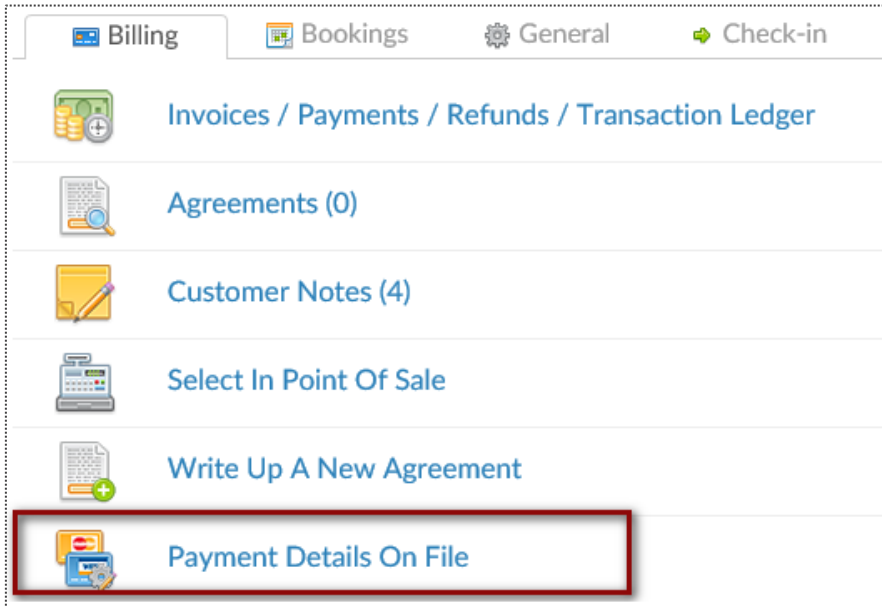
Cancel This Agreement Effective Immediately: This agreement will be cancelled today. All unpaid invoices will be cancelled.

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

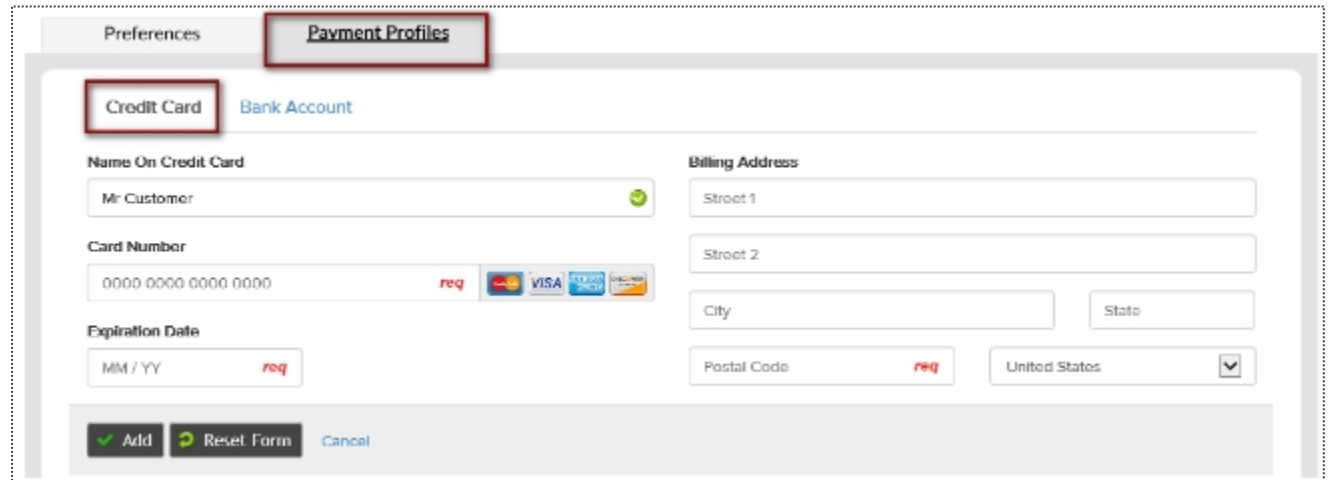


The screenshot shows a navigation menu with the following items:

- 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 fields are:


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

Buttons at the bottom: Add, Reset Form, 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 
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

2/13/2015

Membership Expiration Date

1/21/2017

Internal Prospect Type

PT Training Prospect ▾

Add A Note
(Optional)

✓ Update Status

Member Since Date -This date is set by the member's original membership purchase date. You may alter manually here.

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


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

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

Add A Photo

Member Account > Green Plus Sign

[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

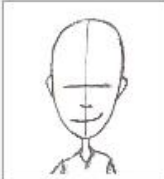
LOGIN AS


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)

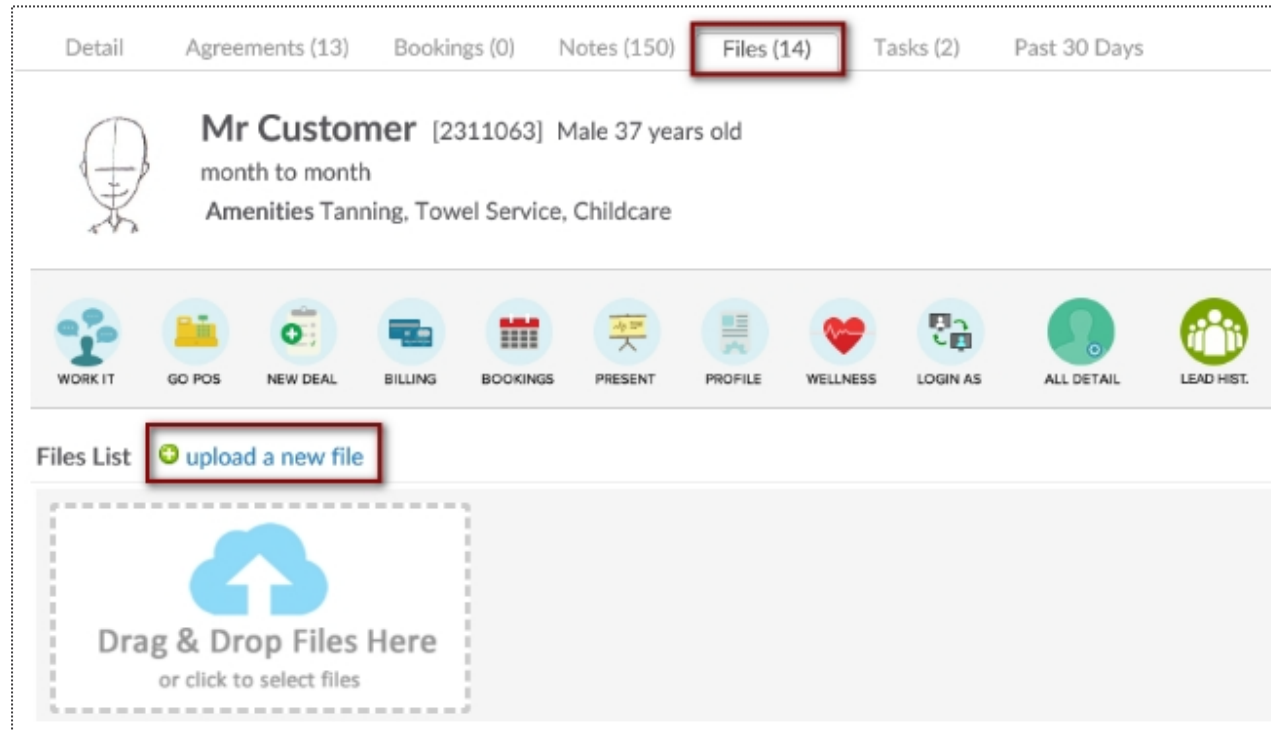
The **Add A New Alert** field allows you to enter a new message for staff.

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

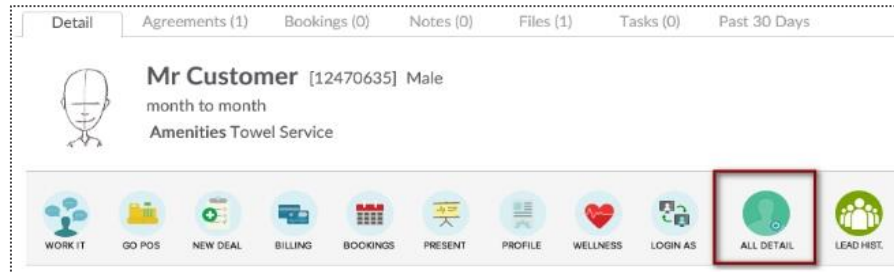
Setup > General > File Folders



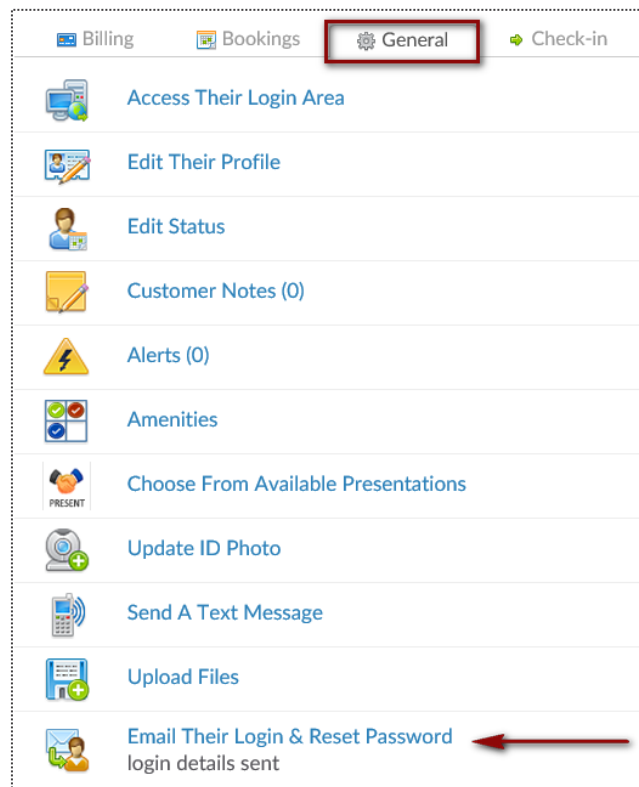
The screenshot displays the client profile interface for 'Mr Customer'. At the top, a navigation bar includes tabs for 'Detail', 'Agreements (13)', 'Bookings (0)', 'Notes (150)', 'Files (14)', 'Tasks (2)', and 'Past 30 Days'. The 'Files (14)' tab is highlighted with a red box. Below the navigation bar, the client's name 'Mr Customer' is followed by '[2311063] Male 37 years old', 'month to month', and 'Amenities Tanning, Towel Service, Childcare'. A row of icons represents various functions: WORK IT, GO POS, NEW DEAL, BILLING, BOOKINGS, PRESENT, PROFILE, WELLNESS, LOGIN AS, ALL DETAIL, and LEAD HIST. Below this row, the 'Files List' section features a red box around the '+ upload a new file' button. Underneath the button is a large dashed box containing a 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						

Generate Report

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

 export to Excel

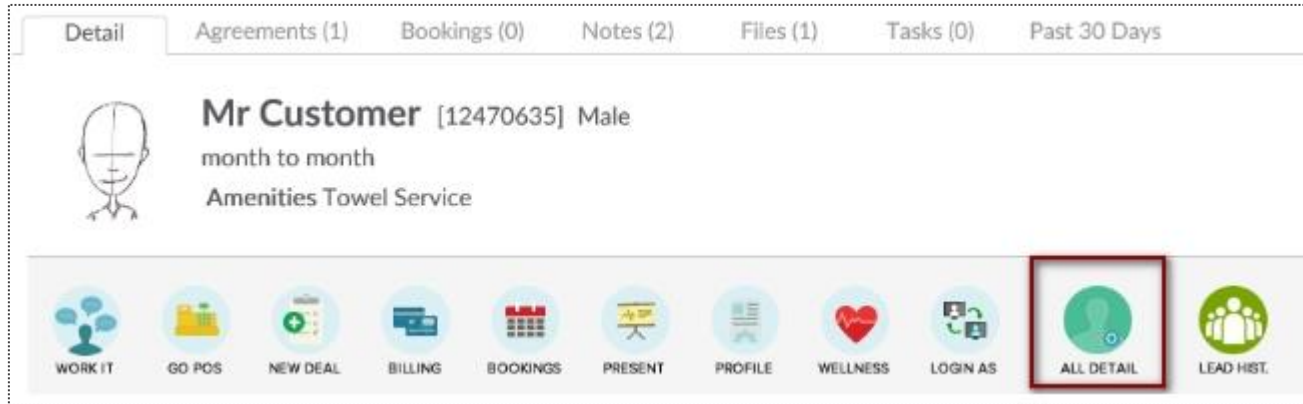
 export to PDF

2 Check-ins found.

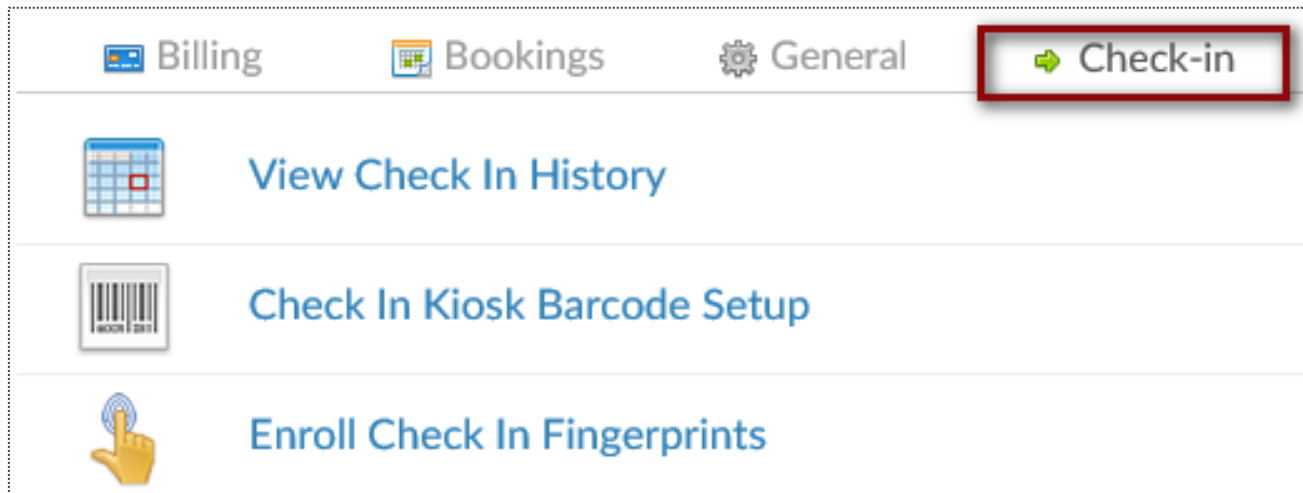
To generate this report, select the date range and click to **Generate Report**. The results will display on screen and show the number of check-ins, date of the check-ins, and the club location of the check-ins.

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



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



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

Update Barcode/Fingerprint



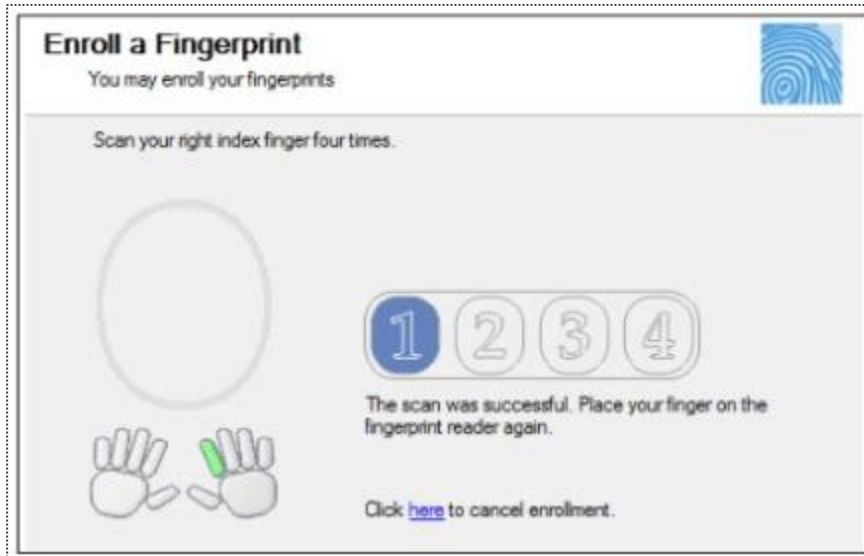
The interface for updating a barcode or fingerprint. It features three options, each with a barcode icon and a green plus sign:

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

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



The fingerprint enrollment interface. It includes a title "Enroll a Fingerprint", a sub-header "You may enroll your fingerprints", and an instruction "Scan your right index finger four times." Below this is a large oval scan window and a row of four numbered circles (1, 2, 3, 4). The first circle is highlighted in blue. At the bottom, there is a diagram of hands with the right index finger highlighted in green, and a link to cancel enrollment.

Click [here](#) to cancel enrollment.

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

Setup > General > Check In Web Kiosk

Your Check-In Kiosk Can Be Found At
<http://www.CRMembershipTest.clubready.com/kiosk>

The Kiosk Setup tab will show **Your Check-In Kiosk Can Be Found At** and copy the link (right click, choose Copy Link Address)

01:35:46 PM



An Admin / Provider Must Activate
This Check In Kiosk
With Their Username And Password
Before It Can Be Used

cowner2829




Activate Check In Kiosk


To activate the kiosk, have a staff member with a login to the club type in their username, password and click the **Activate Check In Kiosk** button.

Check In Web Kiosk

01:04:52 PM

 **pure barre**
lift • tone • burn

Client Check In



43864 065100

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 staff or client with the method you have setup.

To learn about the different Web Kiosk check in options, [click here](#).



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.

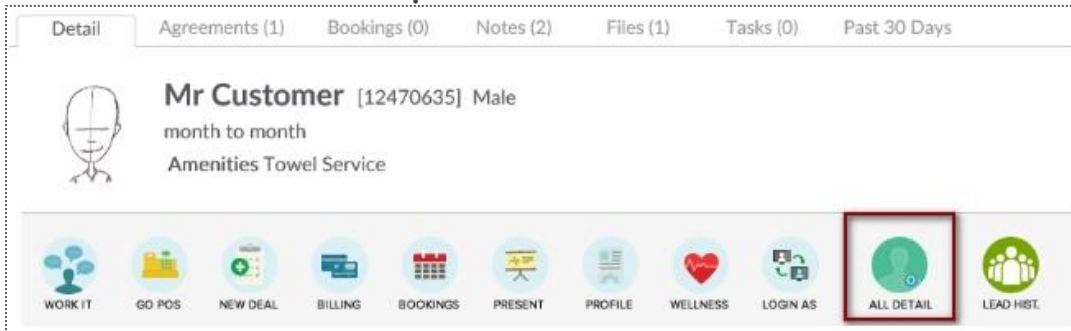
Open Bookings Tab: Bookings not yet completed, or bookings in the past that have not yet been logged to determine their status.

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

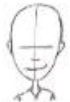
Lost Tab: Paid bookings that were lost due to either the session expiring before it was used, being cancelled outside the allowed cancellation policy for the session, or the customer not showing up for the session.

Completed Tab: Bookings that have been successfully completed

Assign Primary Trainer

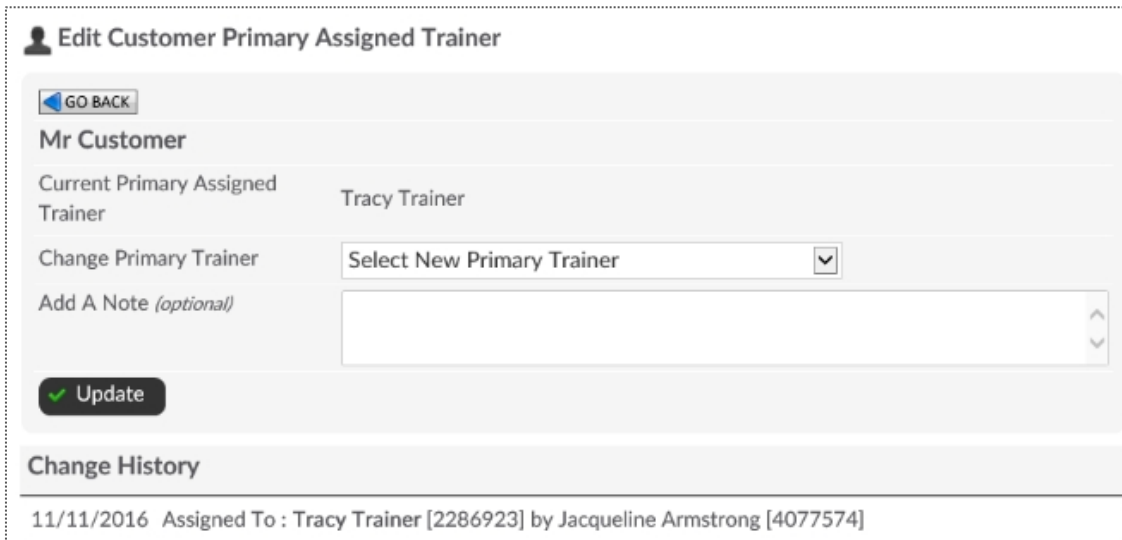



Detail | Agreements (1) | Bookings (0) | Notes (2) | Files (1) | Tasks (0) | Past 30 Days

 **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):

 **Update**

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](#)

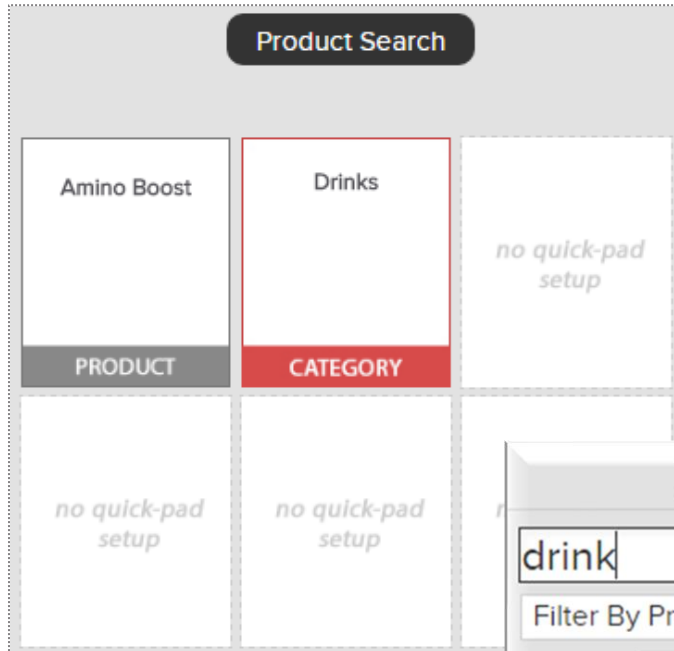
Item	Quantity	Taxable	Price	Extended Price
 Founders Unlimited Monthly Recurring Due 6/15/2018	1	-	\$89.00	\$89.00

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.

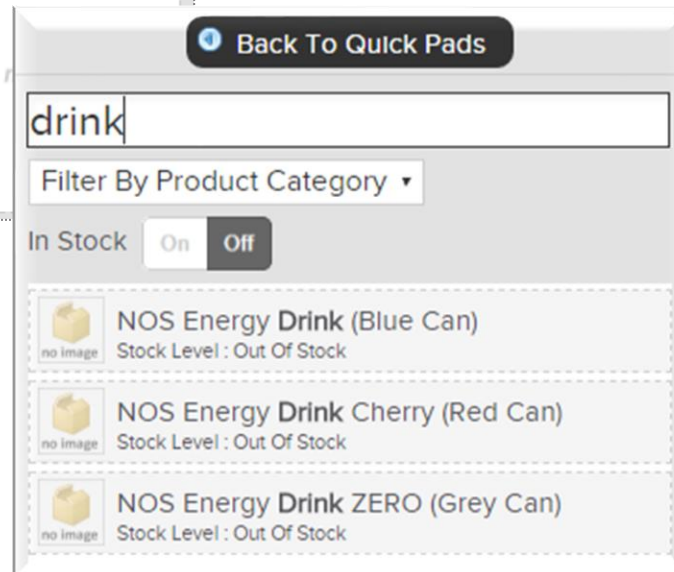
If the client has any invoices that are due, they will automatically populate in the POS shopping cart. You can also access the client's **Future Invoices** to take payment on an invoice not yet due. Any unfinished transactions can be resumed by selecting the **Incomplete Carts** button. Select **Add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

\$15.00

Item	Quantity	Taxable	Price	Extended Price
<div><input type="button" value="✓ Update"/> <input type="button" value="✗ Remove Item"/> <input type="text" value="Assigned to Current User"/> <input type="button" value="✗ Cancel"/></div> <div><div>🥊 Boxing Gloves</div><div>115.00</div></div> <div><input type="text" value="enter a note (at least 10 characters)..."/></div> <div><div>Apply A Product Discount To \$15.00</div><div>5% Discount (\$14.25)</div><div>10% Discount (\$13.50)</div><div>15% Discount (\$12.75)</div><div>20% Discount (\$12.00)</div></div>				

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

⌛ CHECKOUT

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

1234567890.

+ EXACT


✖ CLEAR + BILLS


Cash Tendered
\$0.00

CHANGE
\$0.00

POS setup


my permissions





Sale Assigned To  Major Tom


Item	Quantity	Price
Boxing Gloves	1	\$15.00
Item Total		\$15.00
Sub Total		\$15.00
Sales Tax		\$0.00
Order Total		\$15.00
Change Due		\$0.00

Add Payments


CARD


BANK ACH


EXTERNAL


CHECK

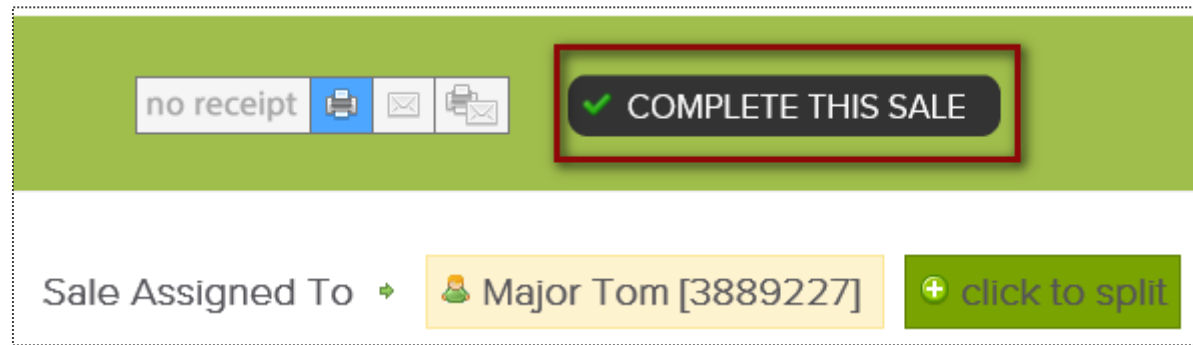
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

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

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

Finalizing the Purchase

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



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.

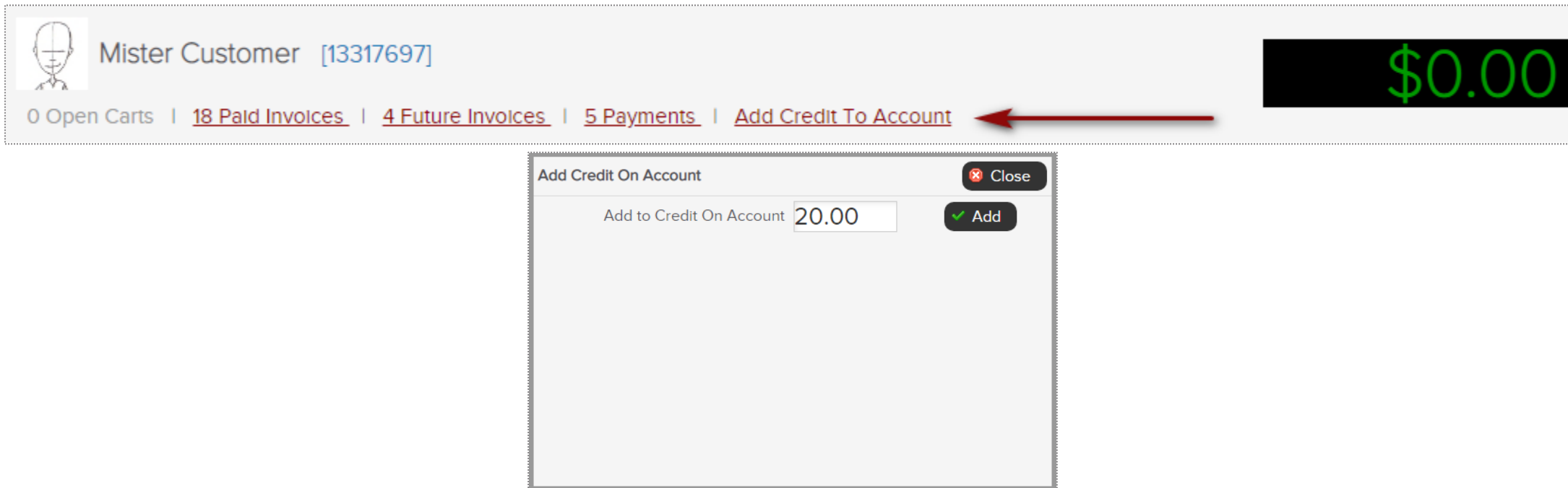
Restricted Card - The customer’s bank has declined the transaction as the card has some restrictions.

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



The screenshot displays the Point of Sale (POS) interface. At the top, a customer profile is shown with a placeholder icon and the name 'Mister Customer' followed by the ID '[13317697]'. To the right, a black box displays the current balance as '\$0.00' in green. Below the customer information, a navigation bar contains several links: '0 Open Carts', '18 Paid Invoices', '4 Future Invoices', '5 Payments', and 'Add Credit To Account'. A red arrow points to the 'Add Credit To Account' link. Below this bar, a modal window titled 'Add Credit On Account' is open. It features a text input field labeled 'Add to Credit On Account' with the value '20.00' entered. To the right of the input field is a green 'Add' button with a checkmark icon. In the top right corner of the modal is a 'Close' button with a red 'X' icon.


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



Current Inventory

search for specific products...

Filter By Product Category

☒ Don't Show Products That Have Never Been Sold And Have No Stock Level

☐ Only Show Out Of Stock

☐ Show Product Image

export (also used as template for bulk adjust tool)

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

Navigate to **Reports > Products > Inventory**. Use the drop down box to **Filter By Product Category** and use checkbox options if needed.

To create an Excel export with all products listed then leave the drop down menu blank and uncheck **Don't Show Products That Have Never Been Sold And Have No Stock Level**.

Click on the Excel **export (also used as template for bulk adjust tool)** link.

Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory

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

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

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

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

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

Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory

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
Acosta



Mister
Customer


Jon
Customer

1st



 6:00 PM - 6:45 PM : Connect Happy Hour Friday (45 mins) Class :
No Instructor 50 Open Spaces

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

17

AUG 2018

✓ today

tomorrow

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

 refresh


 3:30 PM : Endurance (75 Mins) - (48 Open Spaces)



 Make Booking


 Jon Customer

WORK IT

 Bryan Frisina

Show


No Show

 Marissa Acosta


WORK IT

Show

No Show


 Mister Customer


WORK IT

 Timmy CycleStar

Show

No Show

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

 Make Booking

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)

Yes


No

Duplicate This New Class

Schedule The Class

Assign instructor to the class.

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

 pure barre®

Classes: Schedule a Class Booking

Bookings > Classes

TIME / DATE	<div>ADD A CLASS</div> <div>MON JAN 22</div>	<div>ADD A CLASS</div> <div>TUE JAN 23</div>
6:00 AM	<div>50</div> <div>Classic (60 Mins)</div> <div>6:00 AM - 7:00 AM</div> <div>Demo L</div>	<div>50</div> <div>Classic (60 Mins)</div> <div>6:00 AM - 7:00 AM</div> <div>Demo L</div>
8:00 AM		
9:00 AM	<div>50</div> <div>Connect (45 Mins)</div> <div>9:00 AM - 9:45 AM</div> <div>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

Note : Mr has no available paid credits for this type of booking but per Rides session credit rules, an available Ride Credit Class session credit will be used to make this booking

Customer Notification
☒ Send Mr An Email To
customer@email.com
☐ Send A Text Message (requires credits)

Optional Internal Note (Mr will not see it)

Make The Class Booking For Mr

Back

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

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

Classes: 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	


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

THU JAN 5th


8:00 AM - 8:30 AM
Tracy Trainer
Personal Training 30 Mins Session
Book This For
Mr Customer 



Notify Mr

☐ Send Mr An Email To

☐ Send A Text Message  No Cell Phone

Optional Internal Note (Mr will not see it)

 Make The Booking For Mr

 Back

Click the **Add New Booking** button. Select the desired service and use the search box to search for your client.





Send An Email To or **Send A Text Message** to notify your client of their booking.

Select **Make The Booking** to complete.




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

Grid View: Cancel a Booking

Bookings > Grid View


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

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

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

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

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

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

Notification

☒ Send An Email To

☐ Send A Text Message (requires credits)





Optional Internal Note

[Cancel This Booking](#)


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


Grid View: Manually Log a Session


Bookings > Grid View

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

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





















**Mr Customer [ID 2311063]** 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										

Customer Validation
No customer check-in logged
No Customer Booking Confirmation
 A staff member with sufficient permissions can always change the payroll status later of this booking.

Click To Select Status
☒ Booking Completed Successfully ☐ Customer Did Not Show Up




Optional Note
(Client Does Not See This Note)
Booking #40329770 Note 1/5/2017 Fitness

[Log The Booking](#) [Log The Booking And Go To POS](#)

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 Trainer					
Time										
7:00 AM									7:00 AM	
8:00 AM									8:00 AM	

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

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

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

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

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.

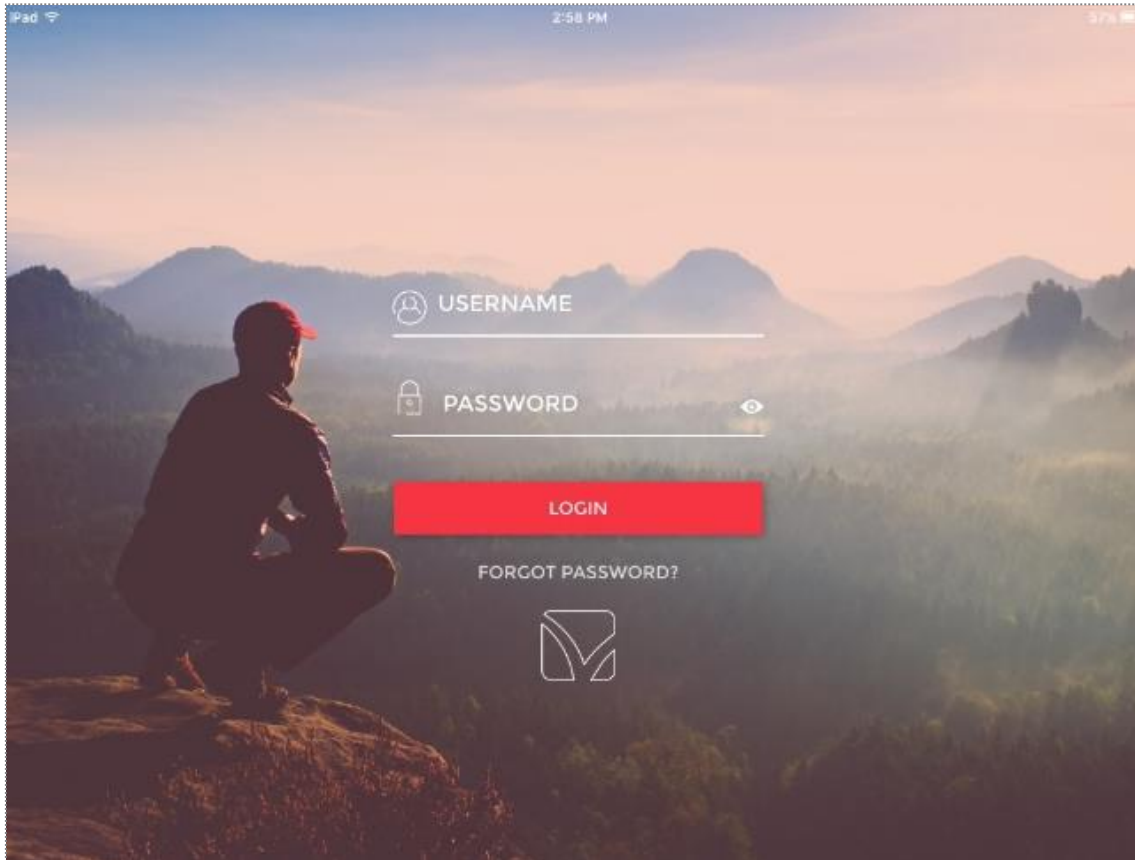


App



ClubReady Class Kiosk App: Login Screen

Use your staff login and password to access the ClubReady Class Kiosk App



The ClubReady Class Kiosk can be downloaded from the [App Store](#) or in [Google Play](#), and MUST be used on a tablet

Checking into the tablet will count towards your client's Milestones in ClubReady

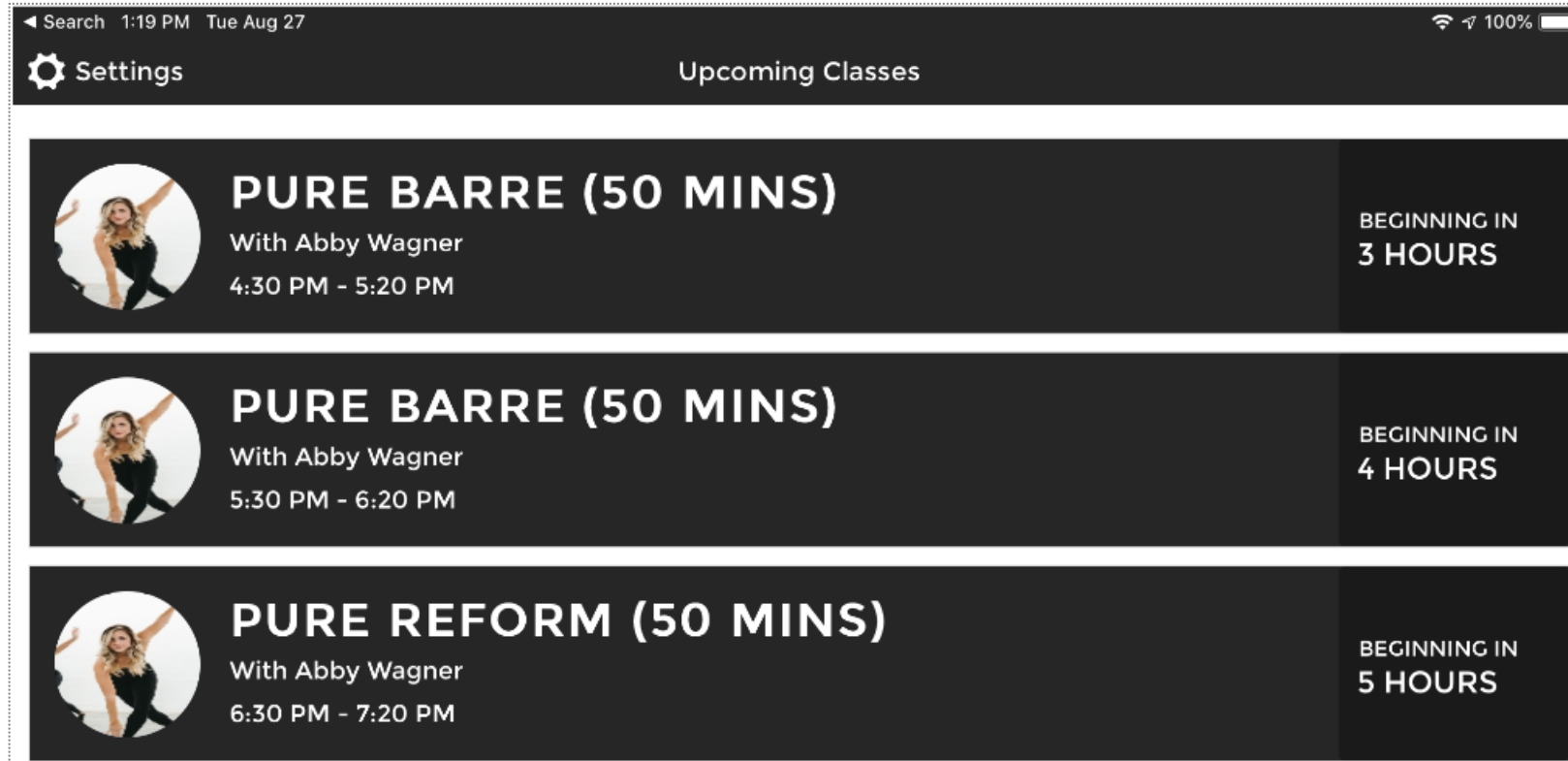
The app does not currently support showing past classes – please make any modifications to past bookings or classes in ClubReady

The app will support walk-in clients who 'Join Now' as long as their primary (home) phone number is listed in ClubReady AND they are signing up for a class in their home studio; if they are signing up at a visiting location, the staff must add them into class.



ClubReady Class Kiosk App: View Upcoming Classes

Use your staff login and password to access the ClubReady Class Kiosk App





ClubReady Class Kiosk App: View Current Bookings

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

Search 1:20 PM Tue Aug 27

< Back Pure Reform (50 Mins)

6:30 PM - 7:20 PM With Abby Wagner

Not Yet Checked-In

	Andrea L.	I'M HERE
	Brandy S.	I'M HERE
	Lisa E.	I'M HERE

Checked-In

JOIN NOW



ClubReady Class Kiosk App: Confirm Check In

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

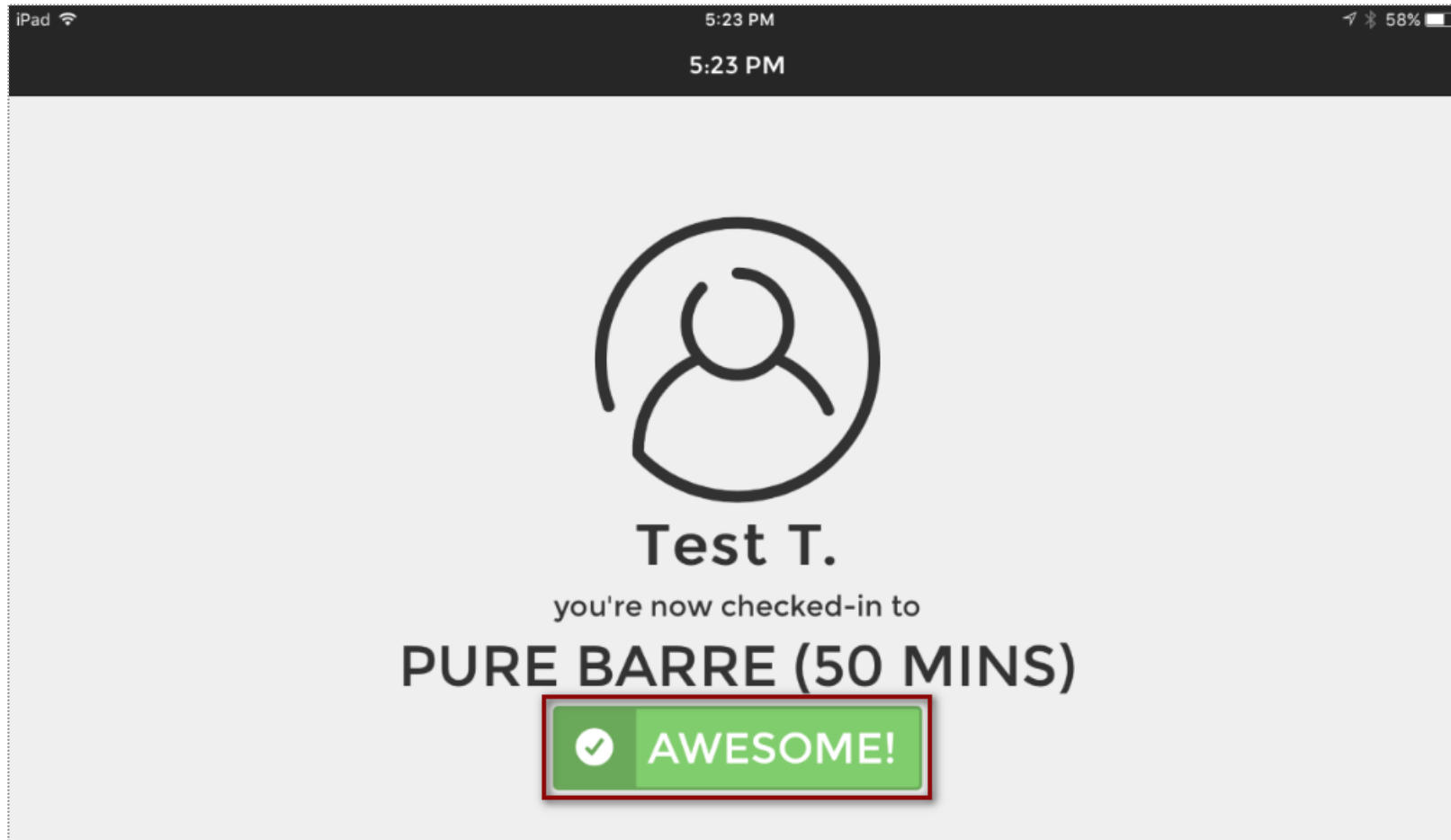
The screenshot shows a mobile app interface with a dark grey background. At the top, there's a status bar with 'Search 1:20 PM Tue Aug 27' and a battery icon at 100%. Below the status bar is a header with a '< Back' button and the title 'ENTER YOUR PHONE NUMBER'. The main content area is divided into two sections: 'Not Yet Checked-In' and 'Checked-In'. Under 'Not Yet Checked-In', there are three rows of names: 'Andrea L.', 'Brandy S.', and 'Lisa E.'. Each name has a corresponding 'I'M HERE' button to its right. A large white overlay with a black border is positioned in the center, displaying a numeric keypad with digits 1-9, 0, a red 'X' button, and a green checkmark button. At the bottom of the app, there is a green 'JOIN NOW' button with a checkmark icon.

Phone Verification will always be required when someone is joining a class, regardless of the button being toggled off.



ClubReady Class Kiosk App: Making a New Class Booking

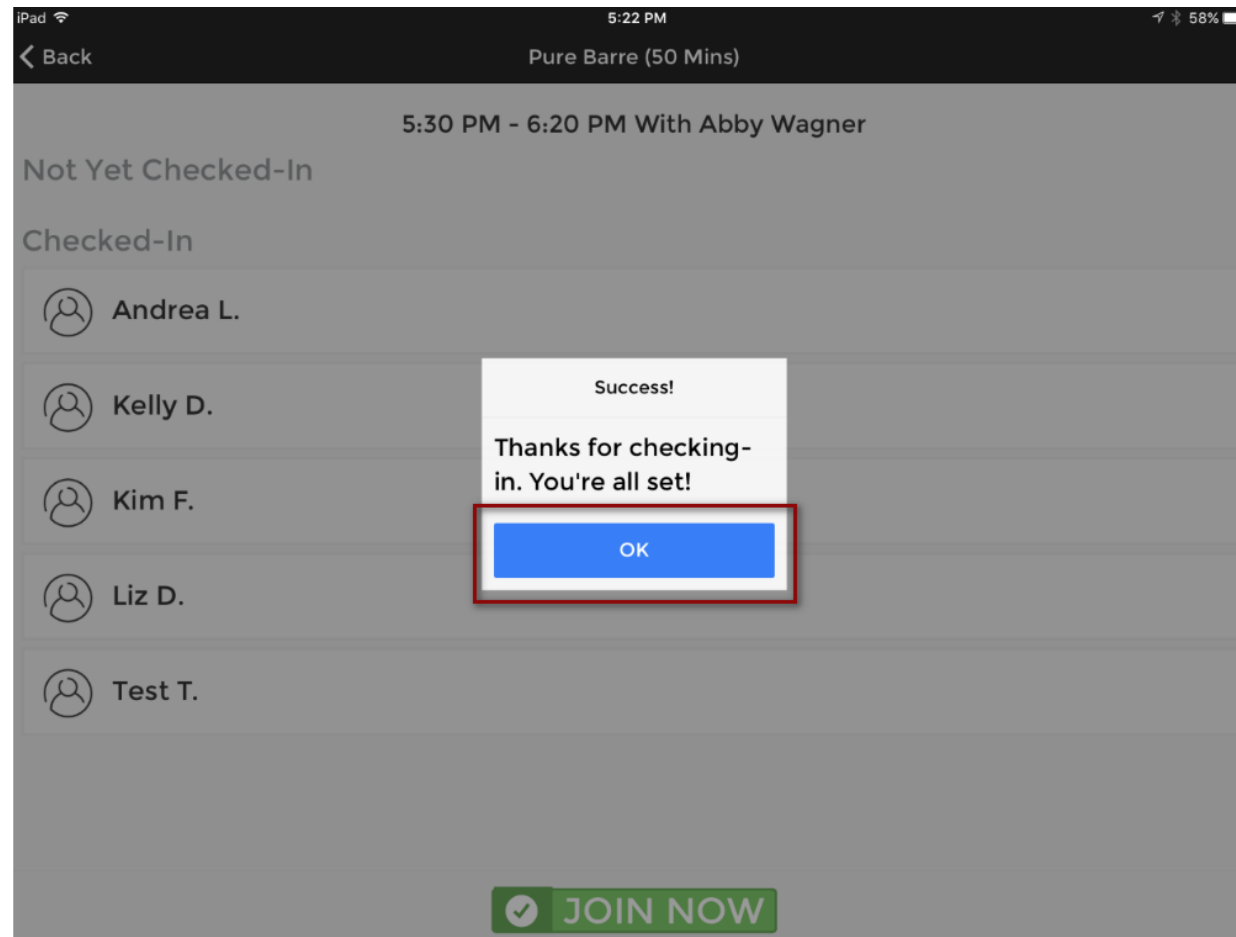
After a new member is booked, select AWESOME! to go back to the class list.





ClubReady Class Kiosk App: Making a New Class Booking

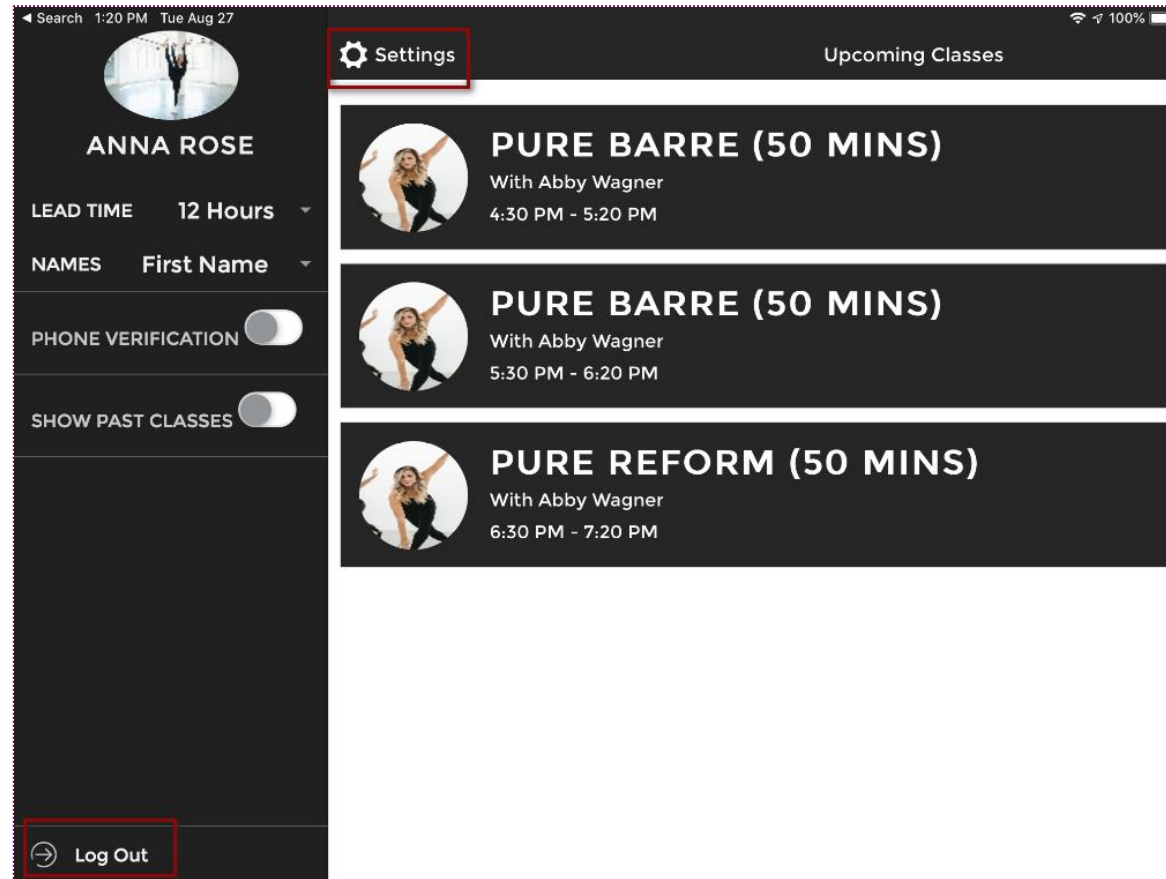
Confirmation will be seen for the member.





ClubReady Class Kiosk App: Editing Your Settings

Adjust your personal settings from the app, including Lead Time, Members Name Display and Log Out.






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"/>	between 4 and 255 characters long
Password	<input type="password" value="••••"/>	between 4 and 10 characters long
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  ☐ 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.

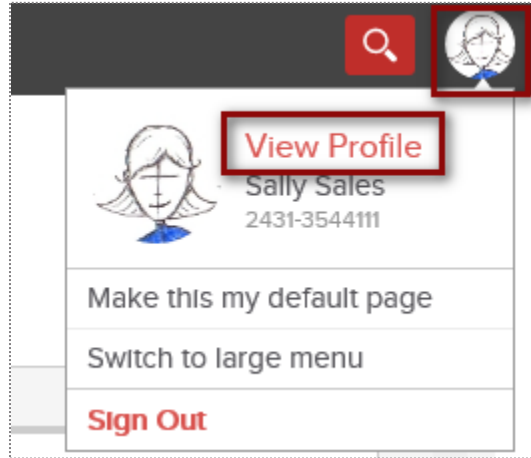
Copy - You can copy the available time from one day to another using this tool.

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**

 **Manually Enter Barcode** **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

01:33:49 PM

 ClubReady

Client Check In


43864 065100

Please Scan Your Barcode

– OR –

Type Your Barcode And Press Enter

Once the employee has a barcode 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.

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


Check In Web Kiosk

Setup > General > Check In Web Kiosk

01:04:52 PM


lift • tone • burn

Client Check In


43864 065100

Please Scan Your Barcode

– OR –

Type Your Barcode And Press Enter

Once the employee has a barcode 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.

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

Staff Time Clock

04:37:44 PM

Mister Manager [20168170]
General Manager



IN



OUT

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.

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

 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



FAQs

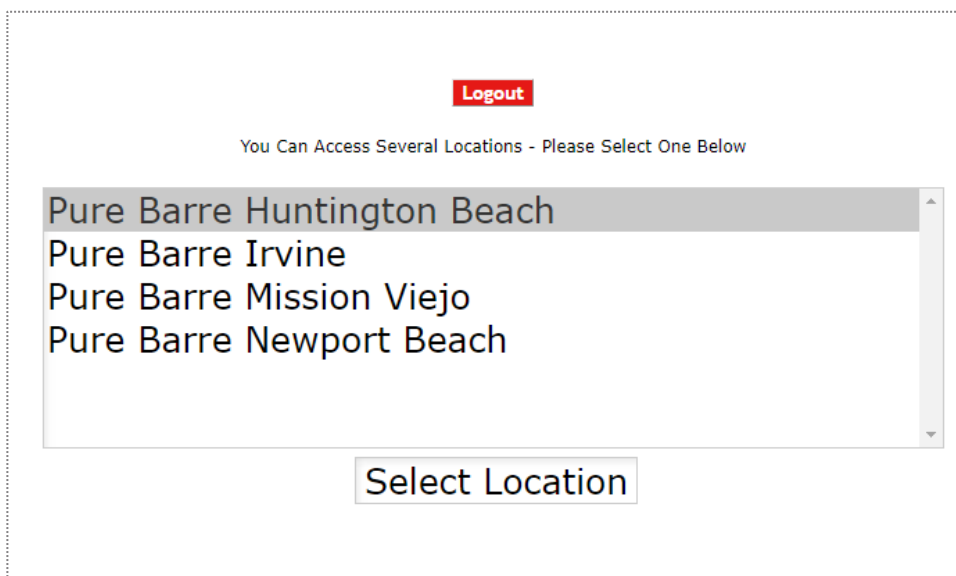
ClubReady FAQs

How do I direct the client to utilize the new mobile application?

Instruct them to download the **'Experience Pure Barre'** app to their phone; this app will only work with studios on ClubReady. If they previously received an email with login instructions, have them refer to that, if not, they can reset their password from the app by clicking on the 'Forgot your password?' link on the login screen and following the prompts.

How do I toggle between multiple locations in ClubReady?

Managers, staff and instructors will be able to access all locations within their district with their login (if an owner/administrator provided access); this will be useful to check schedules, bookings and class availability across all studios. In order to change locations, simply 'click' on the profile icon in the top right corner and select 'Sign Out'; this will take you to the following page, where you can change studios –



The screenshot shows a web interface with a red 'Logout' button at the top. Below it, a message reads 'You Can Access Several Locations - Please Select One Below'. A dropdown menu is open, displaying four location options: 'Pure Barre Huntington Beach' (highlighted), 'Pure Barre Irvine', 'Pure Barre Mission Viejo', and 'Pure Barre Newport Beach'. At the bottom of the dropdown is a 'Select Location' button.

ClubReady FAQs

Why is a client unable to join a class utilizing the check-in kiosk?

Although the kiosk is primarily used for checking-in, it can also be used for walk-ins to register for that class; they are able to do so by selecting the 'JOIN NOW' button and inputting their phone number. If this functionality doesn't work, the following reasons may be the cause –

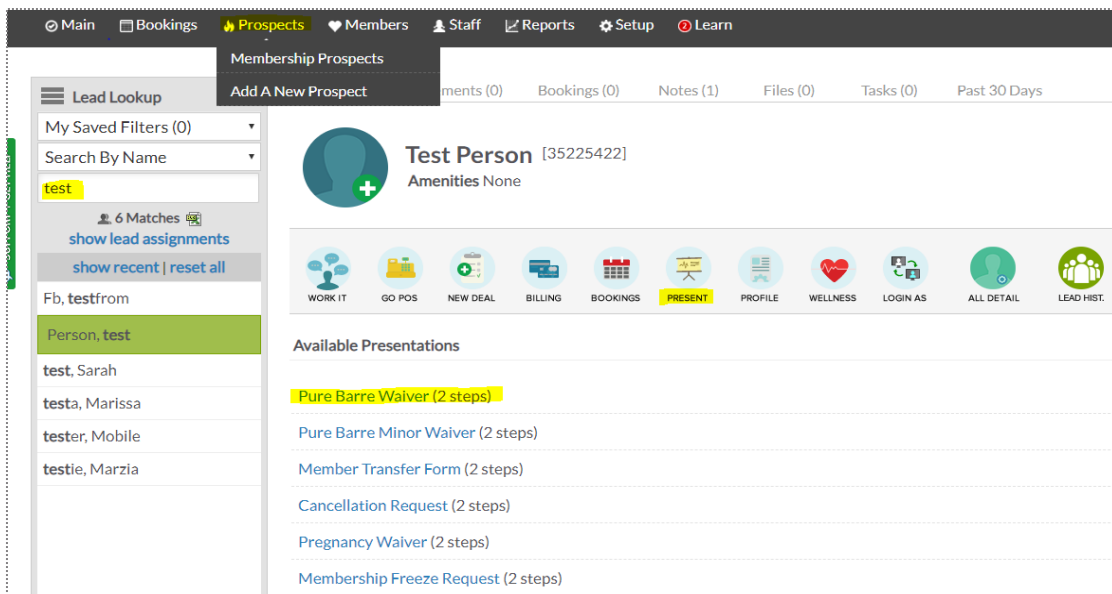
- 1. They are not inputting the correct phone number associated with their account.**
- 2. They do not have enough credits to book a class; this is a selling opportunity to encourage them to purchase more credits or better yet, a membership!**

ClubReady FAQs

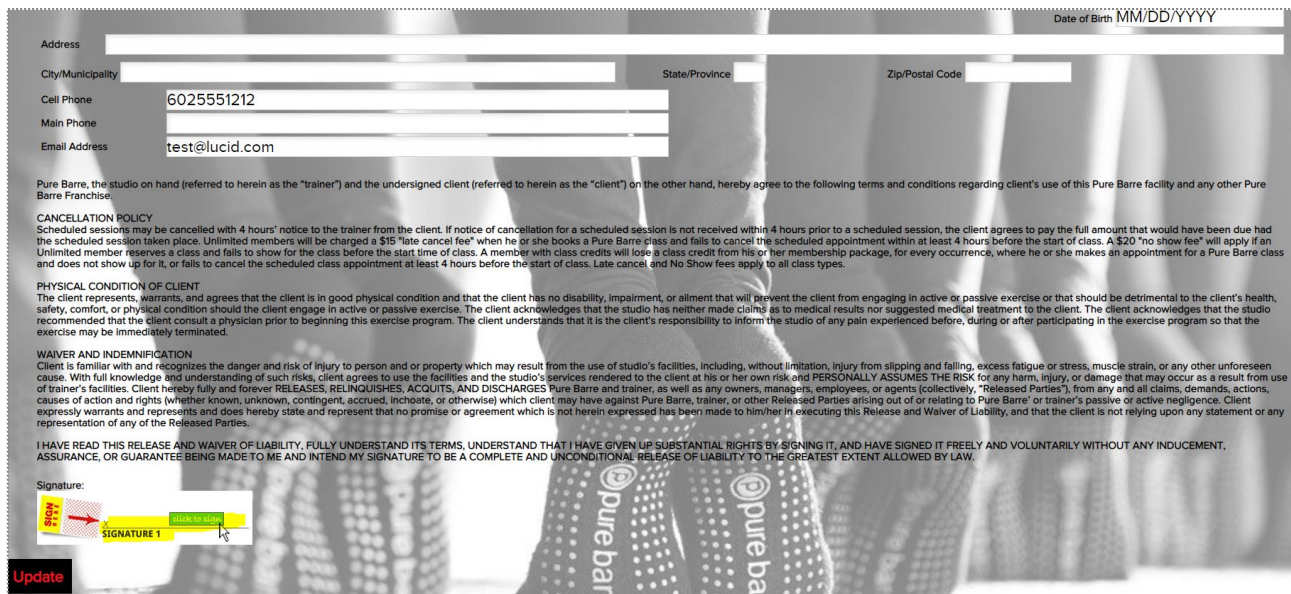
How does a prospect sign a waiver?

All waivers can be found under the 'PRESENT' button in the client's profile in ClubReady. In order to get there, follow these steps –

From the PC, select 'Prospects' on the top bar, search user by name, select 'PRESENT' and click on 'Pure Barre Waiver'. This will open the waiver; ensure that all information is correct, allow the client to read the waiver if they choose to and have them use the touchscreen feature of the PC to sign their name.



The screenshot shows the ClubReady software interface. The top navigation bar includes links for Main, Bookings, Prospects, Members, Staff, Reports, Setup, and Learn. The left sidebar has a 'Lead Lookup' section with a search bar containing 'test' and a list of results including 'test, Sarah', 'testa, Marissa', 'tester, Mobile', and 'testie, Marzia'. The main content area displays the profile for 'Test Person' with a phone number [35225422] and 'Amenities None'. Below the profile is a row of icons for various functions: WORK IT, GO POS, NEW DEAL, BILLING, BOOKINGS, PRESENT (highlighted), PROFILE, WELLNESS, LOGIN AS, ALL DETAIL, and LEAD HIST. Under the 'PRESENT' icon, there is a section titled 'Available Presentations' with a list of options: 'Pure Barre Waiver (2 steps)' (highlighted), 'Pure Barre Minor Waiver (2 steps)', 'Member Transfer Form (2 steps)', 'Cancellation Request (2 steps)', 'Pregnancy Waiver (2 steps)', and 'Membership Freeze Request (2 steps)'.




The screenshot shows the 'Pure Barre Waiver' form. It includes fields for Address, City/Municipality, State/Province, Zip/Postal Code, Cell Phone (6025551212), Main Phone, and Email Address (test@lucid.com). Below the form is a section titled 'Pure Barre, the studio on hand (referred to herein as the "trainer") and the undersigned client (referred to herein as the "client") on the other hand, hereby agree to the following terms and conditions regarding client's use of this Pure Barre facility and any other Pure Barre Franchise.' This is followed by sections for 'CANCELLATION POLICY', 'PHYSICAL CONDITION OF CLIENT', 'WAIVER AND INDEMNIFICATION', and a statement: 'I HAVE READ THIS RELEASE AND WAIVER OF LIABILITY, FULLY UNDERSTAND ITS TERMS, UNDERSTAND THAT I HAVE GIVEN UP SUBSTANTIAL RIGHTS BY SIGNING IT, AND HAVE SIGNED IT FREELY AND VOLUNTARILY WITHOUT ANY INDUCEMENT, ASSURANCE, OR GUARANTEE BEING MADE TO ME AND INTEND MY SIGNATURE TO BE A COMPLETE AND UNCONDITIONAL RELEASE OF LIABILITY TO THE GREATEST EXTENT ALLOWED BY LAW.' At the bottom, there is a 'Signature:' section with a 'SIGNATURE 1' field and an 'Update' button.


ClubReady FAQs


How do I book a client into a class in ClubReady?


Hover over the **'Bookings'** tab and select **'Day List'**. Find the desired class date and time, click on the class to open class details and select **'Make a New Class Booking'**. From there, you can search for a prospect/member that you want to add; if you are unable to locate them, check the box next to **'Include Clients from Other Clubs'** and search for the client again.


THU


7:45 PM - 8:45 PM
Pure Barre (50 Mins) Class
(#17427085)
Starts at 7:50 
Max Attendees : 28 People


With Lanae Malone


 Change Instructor


 Add Secondary Instructor

 Cancel This Class

 Make A New Class Booking

THU OCT 11th 

Pure Barre (50 Mins) Class
7:45 PM - 8:45 PM
Lanae Malone

Enter Name/Barcode Below, or | [With Recent](#) |  [Add New Person](#)

☒ Include Clients from Other Clubs


ClubReady FAQs

How do I apply Groupon credits in ClubReady?


Click on '**Prospects**' and search for the client (if client doesn't exist, add a new prospect and fill-out the required fields'. Under the client profile, select '**New Deal**' and then select '**Continue to Packages**'. From there, select the package named '**Intro's and Trials**', select the appropriate Groupon package, assign the responsible staff in the drop down and select '**Review & Finalize**'. Change the Agreement signature to '**On-screen signature**' and have the client review and sign the agreement. Under the '**Down Payment Today**' box, select '**External**' and ensure **NO** client credits are being used; if they are, remove them, select '**External**' again, select '**Add**' and '**Finalize the Agreement**', and ensure that the client signs the waiver prior to taking any class.


Agreement


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

 **UNSIGNED AGREEMENT**
CLICK TO REVIEW & SIGN

Down Payment Today \$209.00


 AT POS

 CARD


 BANK ACH


 **EXTERNAL**


177.36 **ADD**


 FROM CREDIT ON ACCOUNT (\$0.00 CREDIT WILL REMAIN) \$31.64 **X REMOVE**

Down Payment Today \$209.00

 AT POS

 CARD

 BANK ACH

 **EXTERNAL**

209.00 **ADD**

⚠ no payment method is selected yet

ClubReady FAQs

How do I use ClassPass with ClubReady?

ClassPass Integration process can be found [**HERE**](#)

ClubReady FAQs

How to handle gift certificates in ClubReady

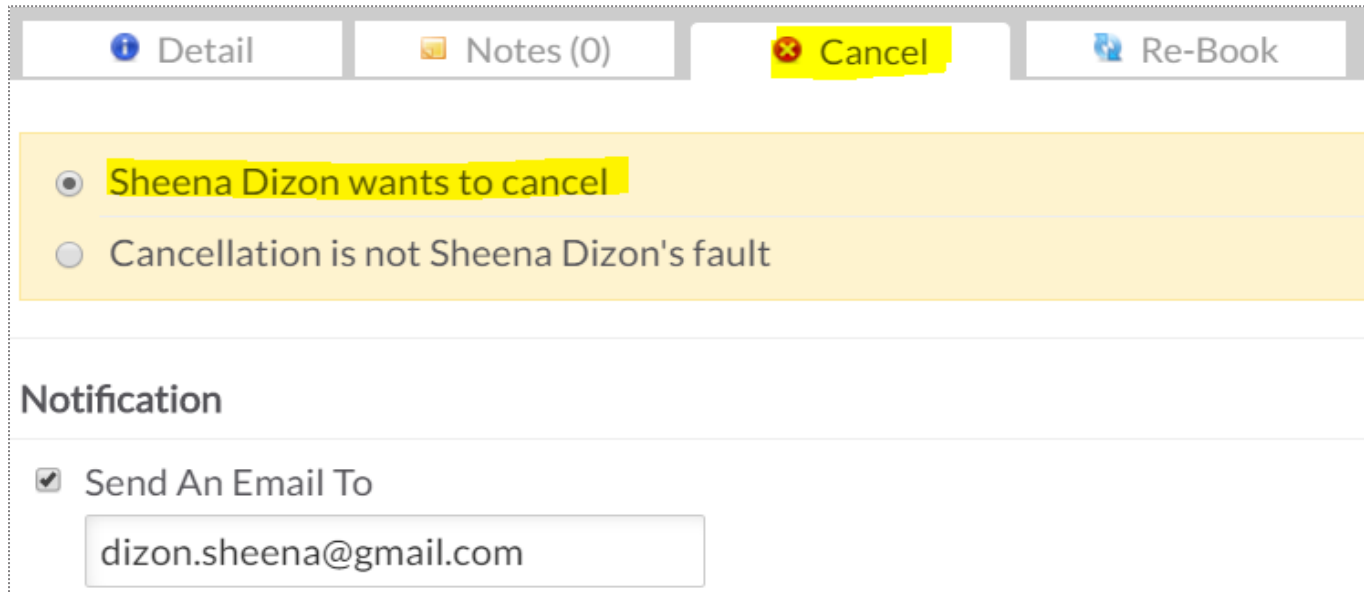
1. Find the Recipient's Prospect or Member Profile and bring them into the POS.
 - If it is a new client, create a new profile under their name. Add the Gift-Giver's contact information to the new profile and add the new client's information to the Key Notes section. Doing this will prevent emails going to the new client and alerting them of the Pure Barre purchase.
2. Select product named '**Gift Certificate**' and add the dollar amount requested by the Gift-Giver
3. Select '**Checkout**'
4. Select '**Card**' and '**Enter**'
5. Enter the gift-giver information into the credit card information field. Deselect '**Store this Credit Card for future purchases?**'
6. Select '**No Receipt**' or change the email address to the Gift-Giver's email address so that the email receipt does not go to the recipient.
7. When the Recipient comes to redeem the gift certificate, update their contact information and refund the purchase back to '**Client Credit Balance**'.
8. Bring the purchase to POS and apply credit to purchase (enable receipt with correct email address)





ClubReady FAQs

How do I **EARLY** cancel a booking in ClubReady (outside 4-hour cancellation window)?

Hover over the '**Bookings**' tab and select '**Day List**'. Find the desired class date and time, click on the individual asking to be early cancelled from class. Select the '**Cancel**' tab, and based on timing of cancellation relative to the class, you will be prompted to do one of the following –

If class is outside the 4-hour cancellation window, the client will not be charged regardless, so keep the first bubble selected. Best practice is to send a confirmation email as well!



 Detail	 Notes (0)	 Cancel	 Re-Book
--	--	--	---

☒ Sheena Dizon wants to cancel

☐ Cancellation is not Sheena Dizon's fault

Notification

☒ Send An Email To

dizon.sheena@gmail.com

ClubReady FAQs

How do I cancel a booking within the 4-hour window?

Hover over the **'Bookings' tab** and select **'Day List'**. Find the desired class date and time, click on the individual asking to be cancelled from class. Select the **'Cancel'** tab, and if the late cancellation is due to a client's request, select the first bubble (the client will be charged), however if the cancellation isn't the client's fault or they have an acceptable reason, select the second bubble, and the client **WILL NOT** be charged, as prompted by the system. See below -

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

☒ Samantha Shin wants to cancel (⚠loses session credit)

☐ Cancellation is not Samantha Shin's fault (does not lose session credit)

Notification


☒ Send An Email To


samvshin@gmail.com


ClubReady FAQs


How do I rebook a client in ClubReady?

Hover over the **'Bookings'** tab and select **'Day List'**. Find the originally booked class date and time, click on the individual asking to be rebooked from that class. Select the **'Re-Book'** tab, select the desired class they want to be rebooked into and select **'Reschedule'**

 Detail

 Notes (0)

 Cancel

 Re-Book

Fri 10/12 8:30 AM - Pure Barre (50 Mins) - Bahareh A

Fri 10/12 9:30 AM - Pure Empower (45 Mins) - Bahareh A - FULL

Fri 10/12 4:15 PM - Pure Barre (50 Mins) - Katie B

Fri 10/12 5:30 PM - Pure Barre (50 Mins) - Katie B


Sat 10/13 7:15 AM - Pure Reform (50 Mins) - Michelle H

Notification

☒ Send An Email To

☐ Send A Text Message (requires credits)

Optional Internal Note

 Reschedule

ClubReady FAQs

How do I mark 'Show/No-Show' in ClubReady?

Hover over the '**Bookings**' tab and select '**Day List**'. Find the desired class date and time, click on the class to open class details. From there, you will see all individuals who are registered for class – once the class starts, clients who checked-in on the kiosk will be marked as '**Show**' in green, those who did not attend class will be marked as a '**No-Show**' in red and will either be charged their credit if they have a package, or will be charged \$20 if they are 'Unlimited' members. Once they are marked as a '**No Show**', the system will automatically charge them that evening.

THU OCT 11th

✓ This Class Is Now Over

8:30 AM - 9:30 AM
Pure Barre (50 Mins) Class
(#17426611)
[add an additional class name](#)
Max Attendees : 28 People

With Bahareh Ameri


Bookings (12)

☐ Show Photos

1. Iram Khan
Booking# [73943104](#)

Show No Show

2. Julie Terrazas
Booking# [73942928](#)

Show No Show

3. Winnie Liao
Booking# [74012718](#)

Show No Show

4. Grace Hsiung
Booking# [74073349](#)

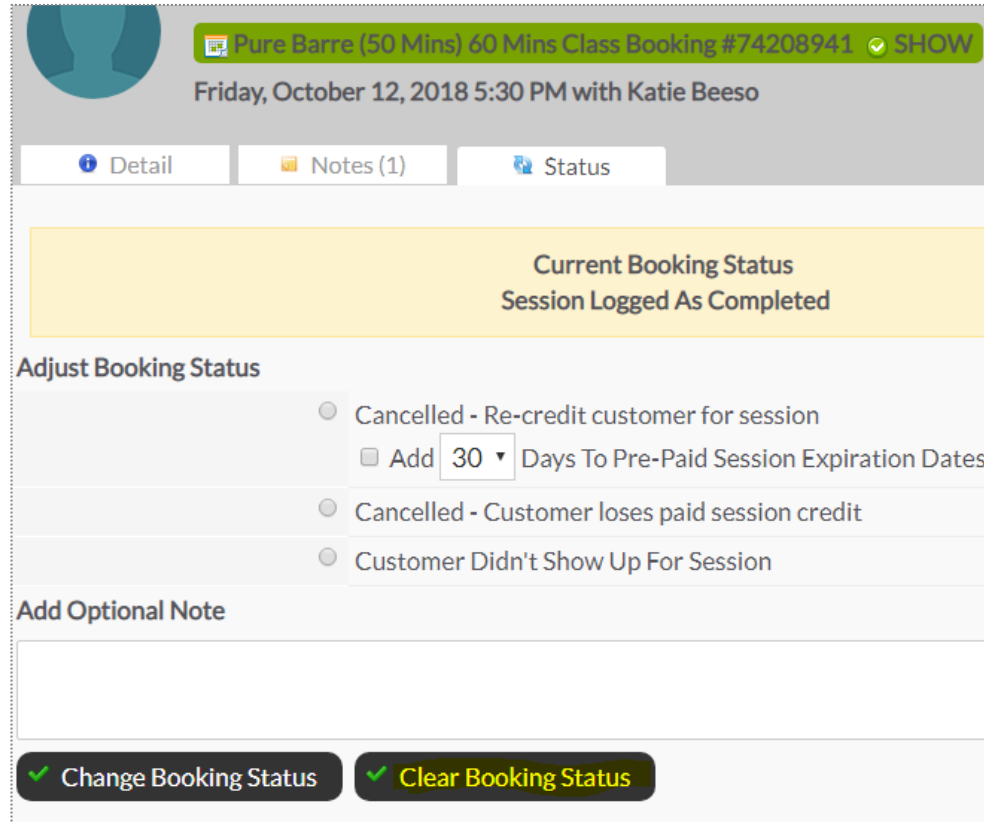
Show No Show


 pure barre®

ClubReady FAQs

How do I correct an 'accidental check-in' in ClubReady?

If someone accidentally checks-in for another member, follow these steps. Hover over the '**Bookings**' tab and select '**Day List**'. Find the desired class date and time, click on the class to open class details. From there, you will see all individuals who are checked into a class; locate the client who was accidentally checked-in, and select '**Clear Booking Status**'.



 **Pure Barre (50 Mins) 60 Mins Class Booking #74208941** ✓ [SHOW](#)

Friday, October 12, 2018 5:30 PM with Katie Beeso

[Detail](#) [Notes \(1\)](#) [Status](#)

Current Booking Status
Session Logged As Completed

Adjust Booking Status

☒ Cancelled - Re-credit customer for session
☐ Add Days To Pre-Paid Session Expiration Dates

☐ Cancelled - Customer loses paid session credit

☐ Customer Didn't Show Up For Session

Add Optional Note

✓ [Change Booking Status](#) ✓ [Clear Booking Status](#)

ClubReady FAQs

How Staff Can Change Their Notification Setting

If staff is receiving cancellation emails regarding clients, they can turn off their notification settings utilizing this [link](#)



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>

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



Reminder: Onboarding Steps

- ☐ Complete onboarding survey
- ☐ Schedule conversion date with conversion team
- ☐ Request exit file from current software company when conversion date is set
- ☐ Access ClubReady training page
 - ☐ Register for CRUniversity
 - ☐ Download the ClubReady user guide
 - ☐ Download the hardware guide
 - ☐ Complete the hardware form
- ☐ Complete the CRUniversity learning path
- ☐ Attend ClubReady Foundations webinar(s)
- ☐ Login to the Demo Site and Practice, Practice, Practice
- ☐ Ask a lot of questions!



ClubReady Support Emails


- support@clubready.com
- chargebackinquiries@clubready.com
- pdcc@clubready.com
- sales@clubready.com


Help Tab: Register for a Webinar

Click **Help > Training Calendar** in ClubReady to locate our available webinars.




 CRUniversity

 Video On Demand

 Training Calendar

 Recent Changes

 Knowledgebase
Articles



Thursday, September 30, 2021

10:00 AM EST

All Club Staff

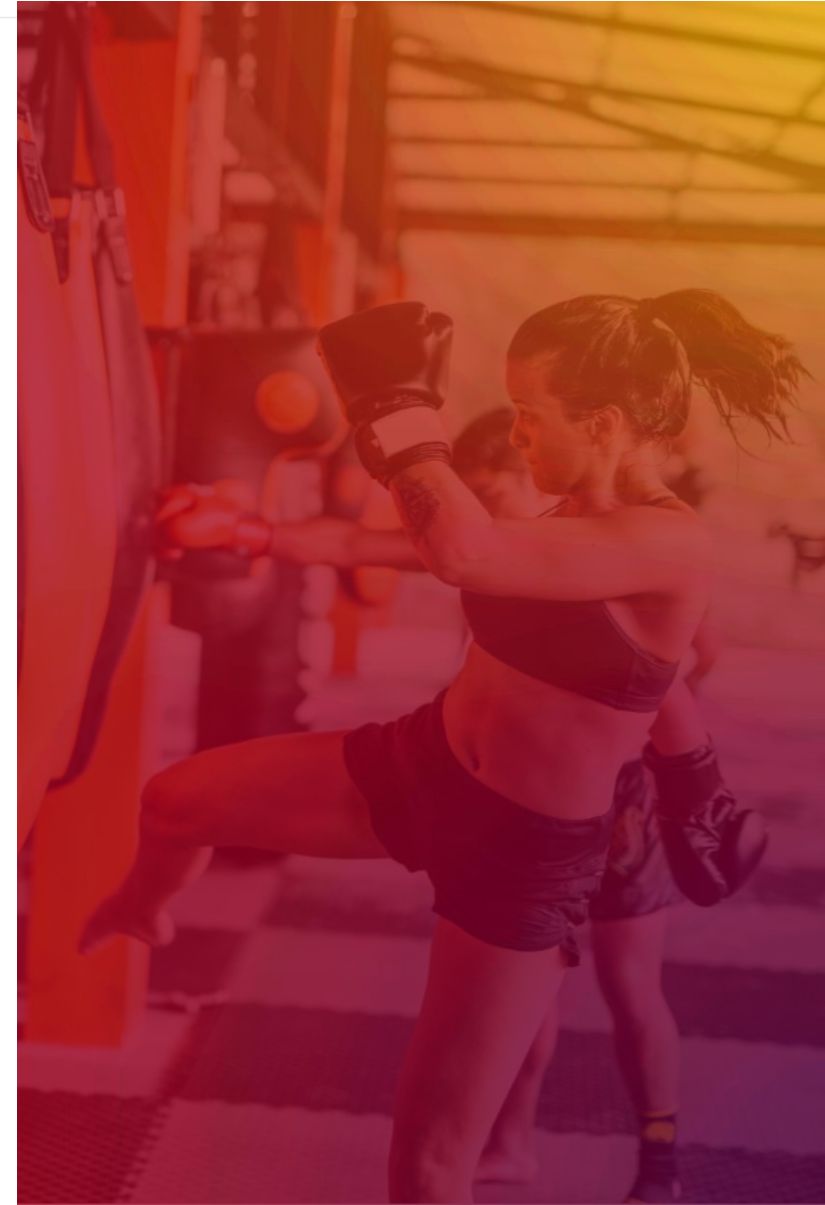
ClubReady Foundations for Staff Members (90 mins) [view details](#)



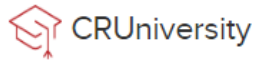
This class covers the basics of ClubReady for Staff, Trainers and Managers. This includes: • Prospect Management • Work It • Agreement Write Up • Scheduling

webinar URL

https://clubready.zoom.us/webinar/register/WN_2gHAQjEmRmGx8HLtBmQ0fw



Help Tab: Additional Resources



CRUniversity

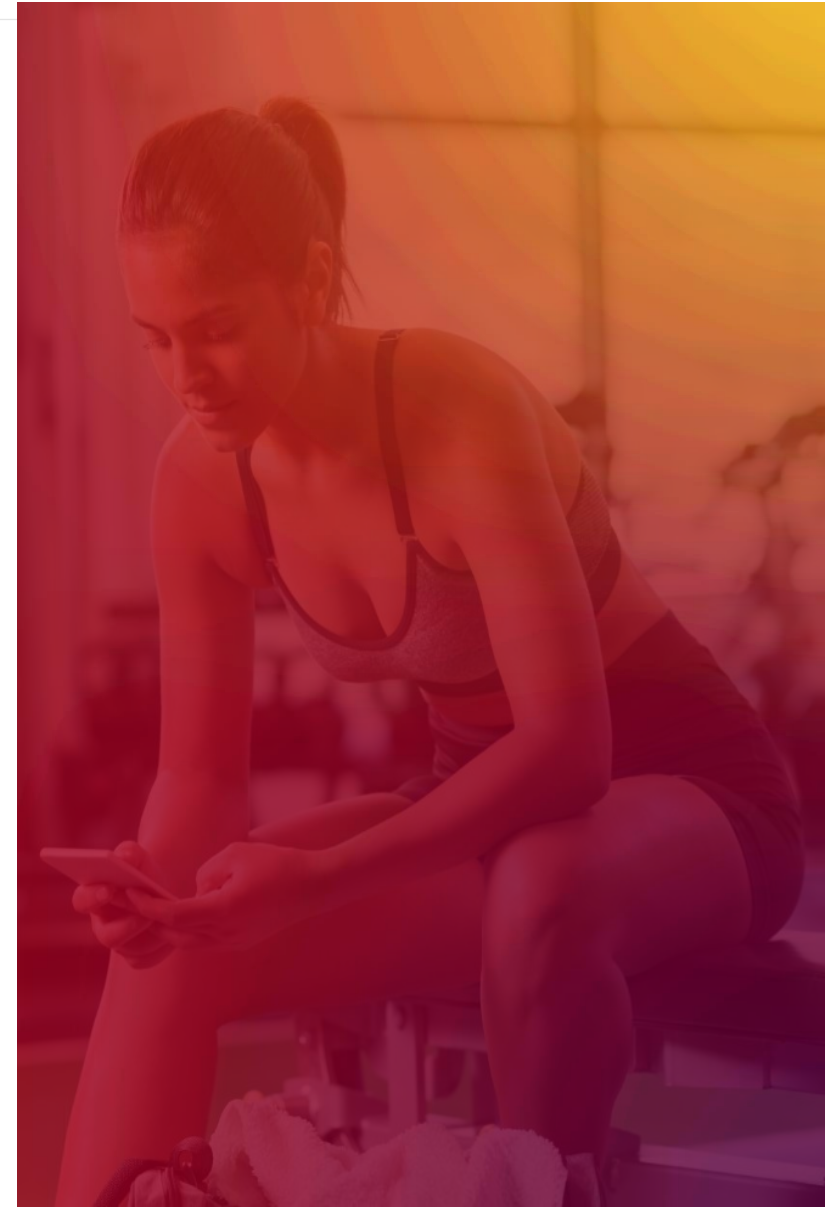
Video On Demand

Training Calendar

Knowledgebase
Articles

Click the **Help** tab in ClubReady to locate more resources such as:

- **CRUniversity** – Access our learning portal for video tutorials.
- **Recent Changes** – Read more on our latest updates.
- **Video On Demand** – Watch our key topic videos.
- **Knowledgebase Articles** – Search for our ‘how to’ guides.
- **Training Calendar** – View and register for available webinars.





CRUniversity provides Learning Paths and Courses designed to assist you in mastering ClubReady through a series of video tutorials. The Courses cover everything from the Menu and how to navigate the site, how to sell agreements, using the Point of Sale, Scheduling, and more!

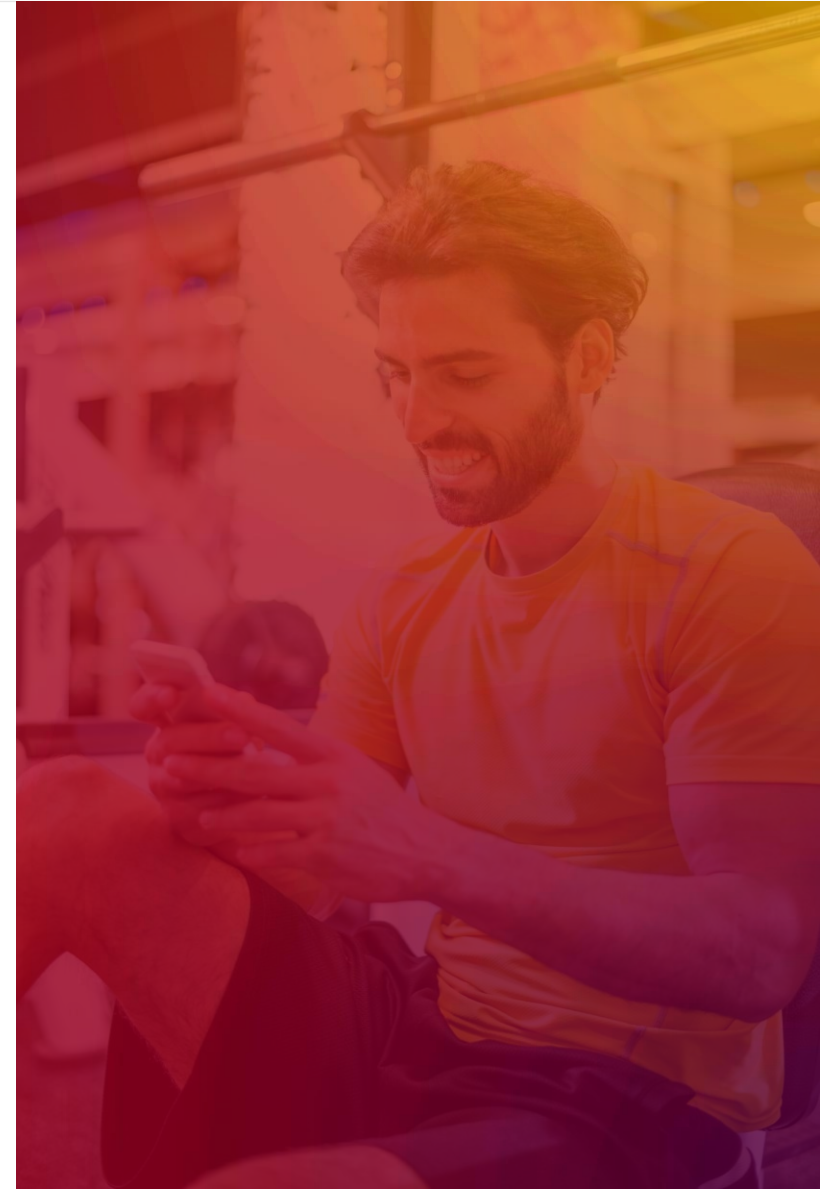
The following codes will automatically register you for the appropriate Foundations Learning Path:

- For Owners and Admins, enter the code: **PureBarreOwner**
- For Staff Members, enter the code: **PureBarreStaff**

Copy the corresponding code that applies to your location and click on the following link to create your account: <https://cruniversity.litmos.com/self-signup/>

You will then receive an email that creates your login and password at <https://cruniversity.litmos.com>

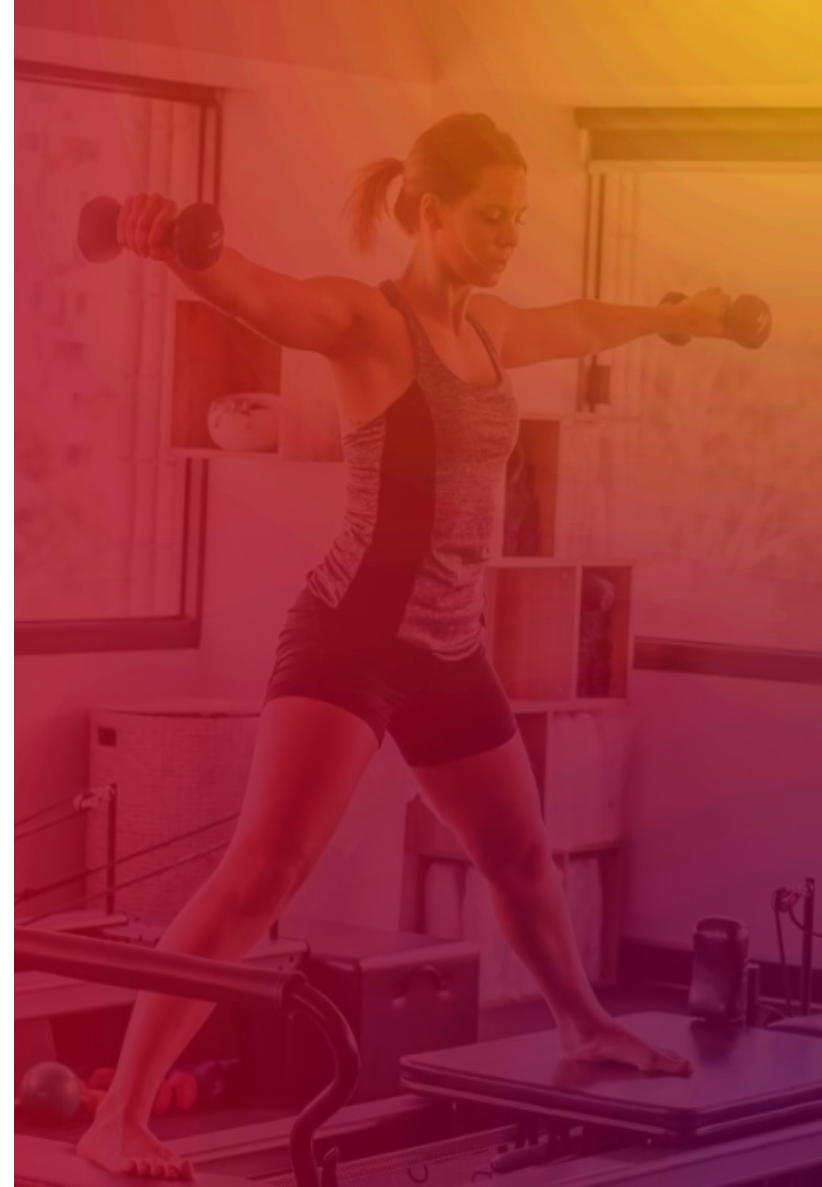
Each Learning Path is made up of several courses that train the user on using the ClubReady software. You can follow the Learning Path that has been constructed, or you can look at different courses based on your individual needs in the Course Library.



Training Home Page

Locate all ClubReady resources in our customized Training Page from CRUniversity, User Guide, and On Demand Videos in a “one-stop” shop:

<https://www.clubready.club/pure-barre-training>



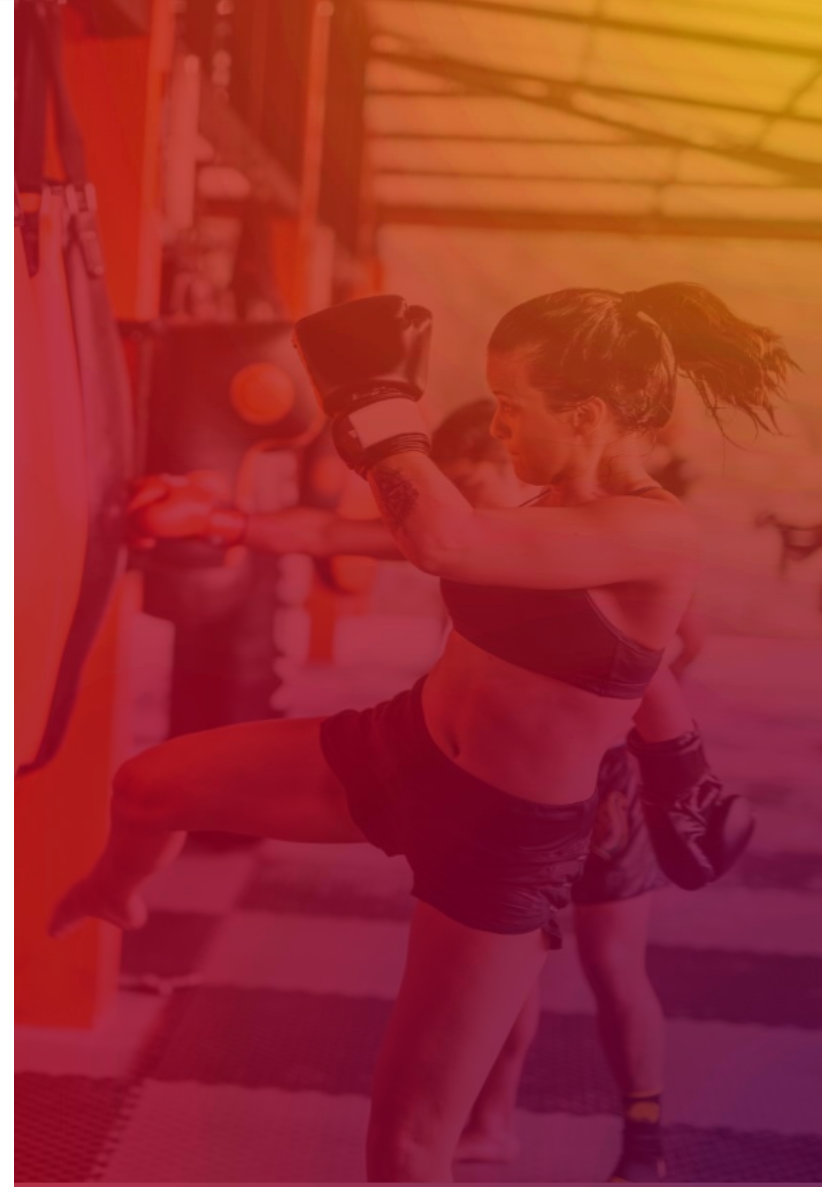
ClubReady Demo Site

Pure Barre Demo Site

<https://www.clubready.com/cl/purebarre.asp>

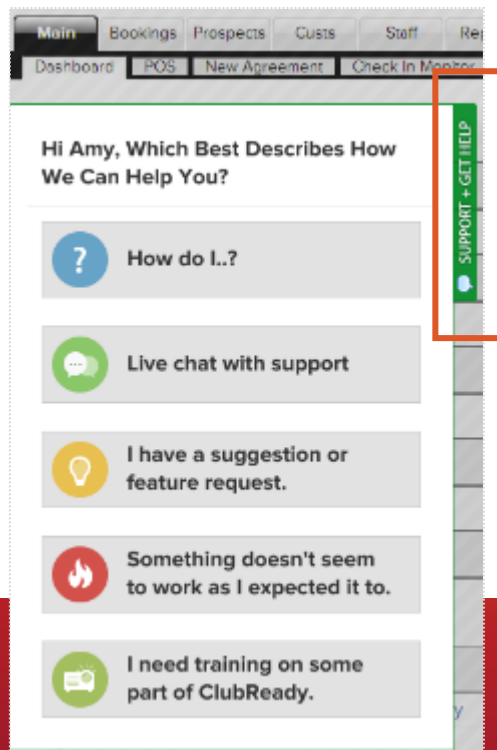
Username: StudioManager

Password: password



Support + Get Help

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



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



You can also reach our support team at 1-800-405-4818
MON – FRI: 6AM – 9PM CST | SAT – SUN: 8AM – 5PM CST

Stay Connected with ClubReady!



Like us on Facebook for updates on enhancements, how-to's and ClubReady news.



Follow us on Instagram for updates on enhancements, how-to's and ClubReady news.



For updates on enhancements and ClubReady news follow @ClubReady



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

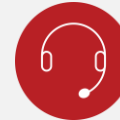
Need Help? Here's How to Get It



Submit a ticket



Post on the Help Forums



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



Use Live Chat



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