



Pure Barre Key Setup Checklist

Review this list to confirm key settings in your site are setup and correct

First Steps: ACTION REQUIRED!

- Complete Setup of Sales Tax and Sales Contracts before your first sale
 - If you aren't sure what your sales tax should be, please reach out to your Accountant/Lawyer
 - Choose a state-specific contract, please reach out to your Corporate Sales Team for any questions on contracts
 - PP – Pre-Paid or Paid in Full Package (annual, single class, class packs)
 - RD – Recurring Dues (any membership with a recurring monthly membership invoice)
- Complete Merchant Documents (will receive an email from merchantservices@clubready.com)
- Access ClubReady Training
 - Register for CRUniversity
 - Download the ClubReady user guide
 - Complete the CRUniversity learning path
 - Attend ClubReady Foundations webinar(s)
 - Login to the Demo Site and Practice, Practice, Practice
 - Ask a lot of questions!

Follow these steps!

1

- **Sales Tax Settings**
- Setup > Sales > Sales Settings > General
- Confirm your products, memberships, etc. are setup with the proper tax (if applicable)
- <https://clubready.zendesk.com/hc/en-us/articles/4406465269389-Create-A-Sales-Tax-Schedule>
- <https://clubready.zendesk.com/hc/en-us/articles/4406465891469-Creating-Sales-Tax-Defaults>



2

- **Sales Package Contract**
- Setup > Sales > Sales Packages
- Select the contract per sales package that your customer will need to sign.
- <https://clubready.zendesk.com/hc/en-us/articles/360042237571-How-To-Determine-What-Contract-Is-Being-Used-In-A-Sales-Package>



3

- **Add a New Staff Member**
- Staff > Add a New Staff Member
- Create a login for your employees to access ClubReady.
- <https://clubready.zendesk.com/hc/en-us/articles/360041847291-How-To-Add-A-New-Staff-Member>



4

- **Staff Scheduled**
- Setup > Scheduling > Staff Scheduled
- Select which staff are to be enabled for scheduling.
- <https://clubready.zendesk.com/hc/en-us/articles/360042527711-Assign-Staff-To-Scheduling>



Follow these steps!

5

- **Staff Hourly Pay Rate**
- Staff > Search for Staff > Go To Options > Time Clock Pay Rate
- Define the pay rate amount for your hourly employees.
- <https://clubready.zendesk.com/hc/en-us/articles/360042188092-Set-Hourly-Pay-Rates>



6

- **Staff Session Pay Rate**
- Setup > Scheduling > Services and/or Classes/Group
- Define the pay rate per session for your trainers and instructors.
- <https://clubready.zendesk.com/hc/en-us/articles/360042615531-Set-Staff-Pay-Rates-For-Services-And-Classes>



7

- **Adding Leads**
- Prospects > Add a New Prospect
- This allows to fill out a form to create an account for your lead.
- <https://clubready.zendesk.com/hc/en-us/articles/360042039052-Add-A-New-Prospect-Through-The-Prospect-Form->



8

- **Selling Memberships**
- Main > New Agreement
- Sell new memberships, services or add-ons to your leads or existing customers.
- <https://clubready.zendesk.com/hc/en-us/articles/360042416711-Selling-A-Membership-Agreement>



Follow these steps!

9

- Invoice/Package Management
- Members > Members Lookup
- Adjust customers invoices as needed by completing edits, refunds or cancellations.
- <https://clubready.zendesk.com/hc/en-us/articles/360042418331-Complete-Guide-To-Invoices>



10

- Internal Reports
- Setup > Communication > Internal Reports
- Set your email to receive emailed reports from ClubReady.
- <https://clubready.zendesk.com/hc/en-us/articles/360041410172-Internal-Reports>





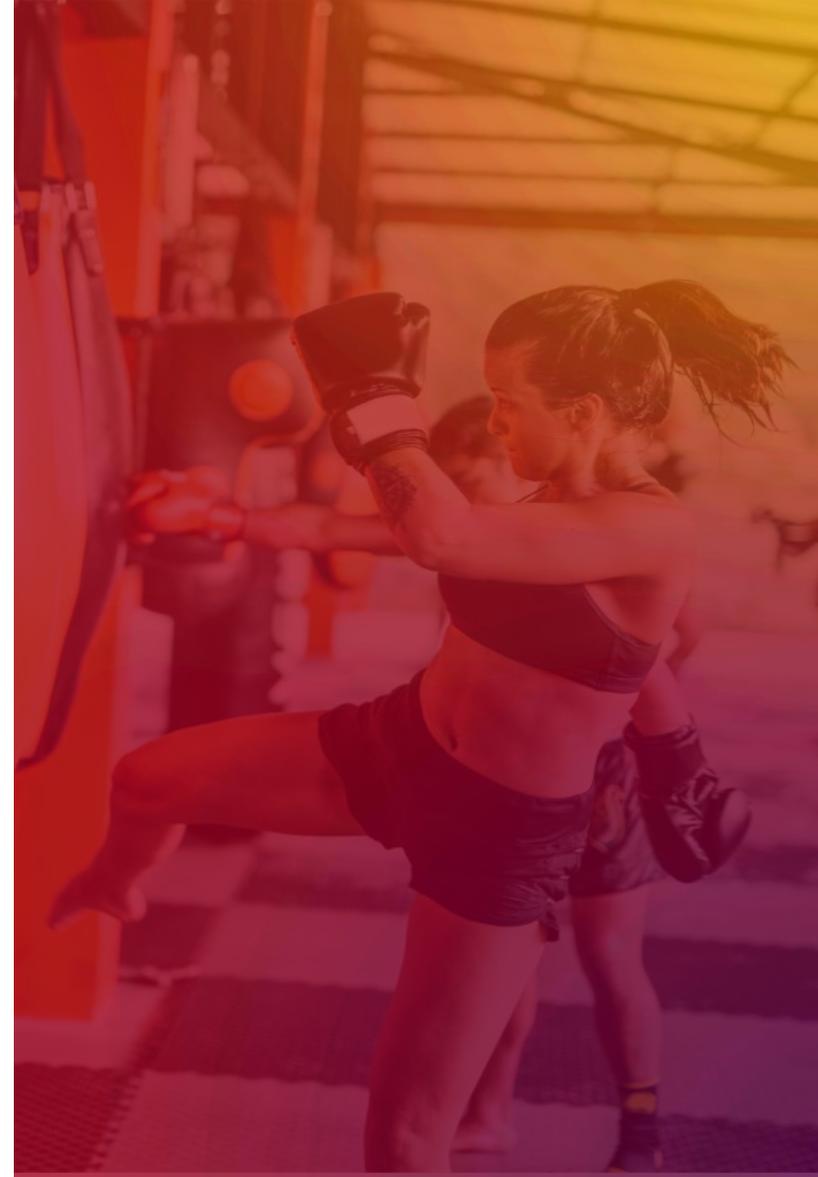
Training & Support

ClubReady Demo Site

Pure Barre Demo Site

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

Username: StudioManager
Password: password





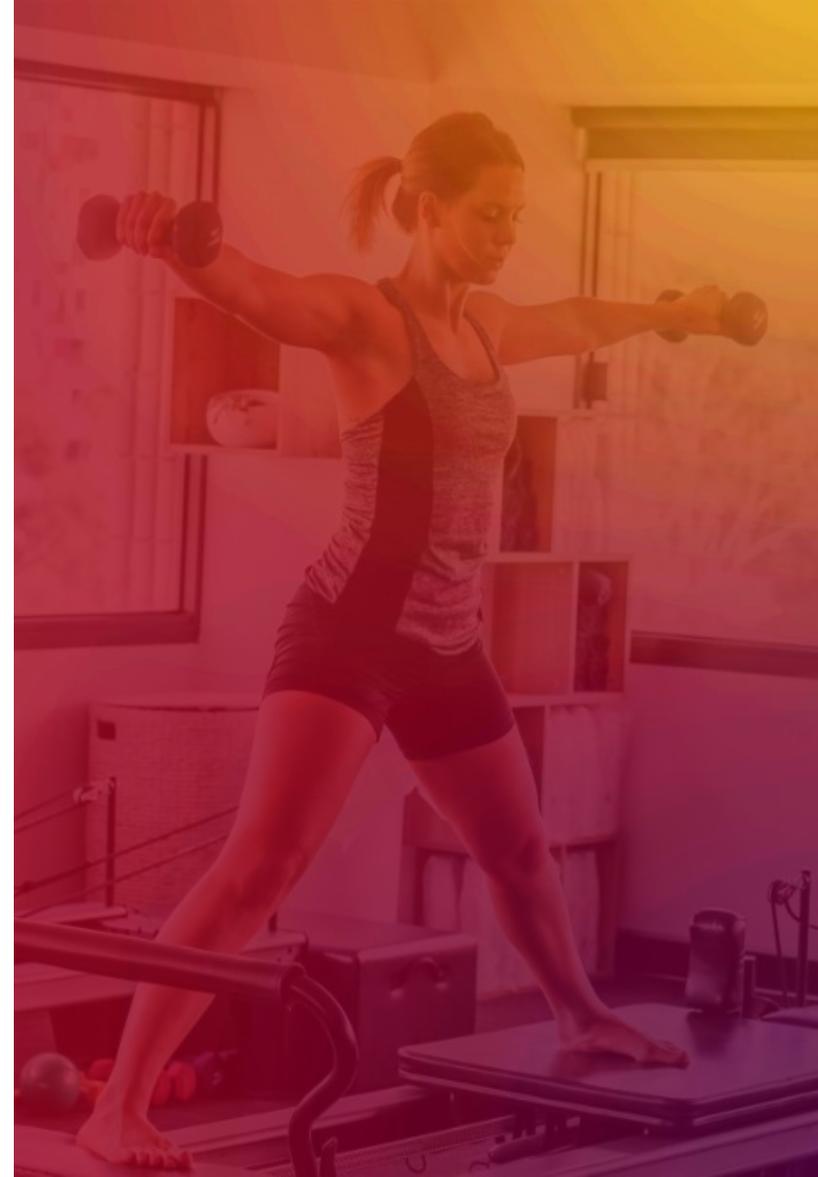
ClubReady Support Emails

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

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>





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!

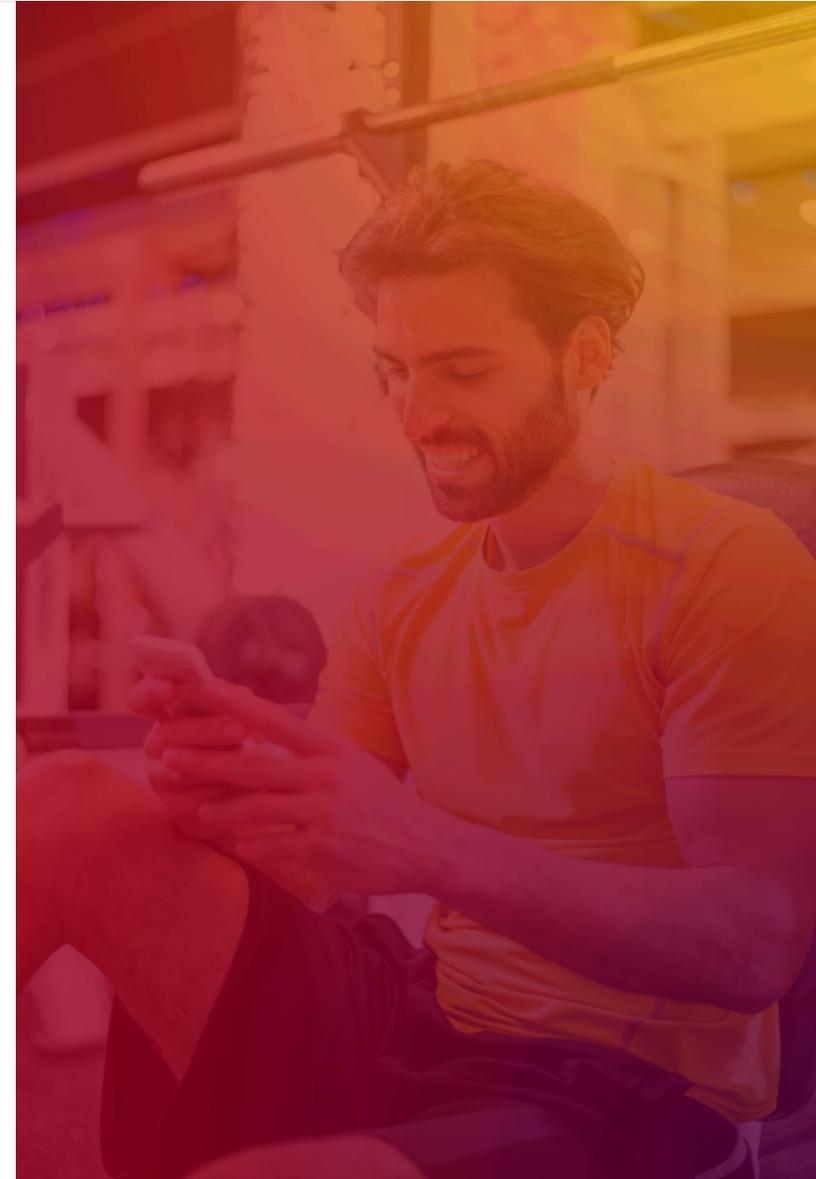
The following codes will automatically register you for the appropriate Foundations Learning Path:

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

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.



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

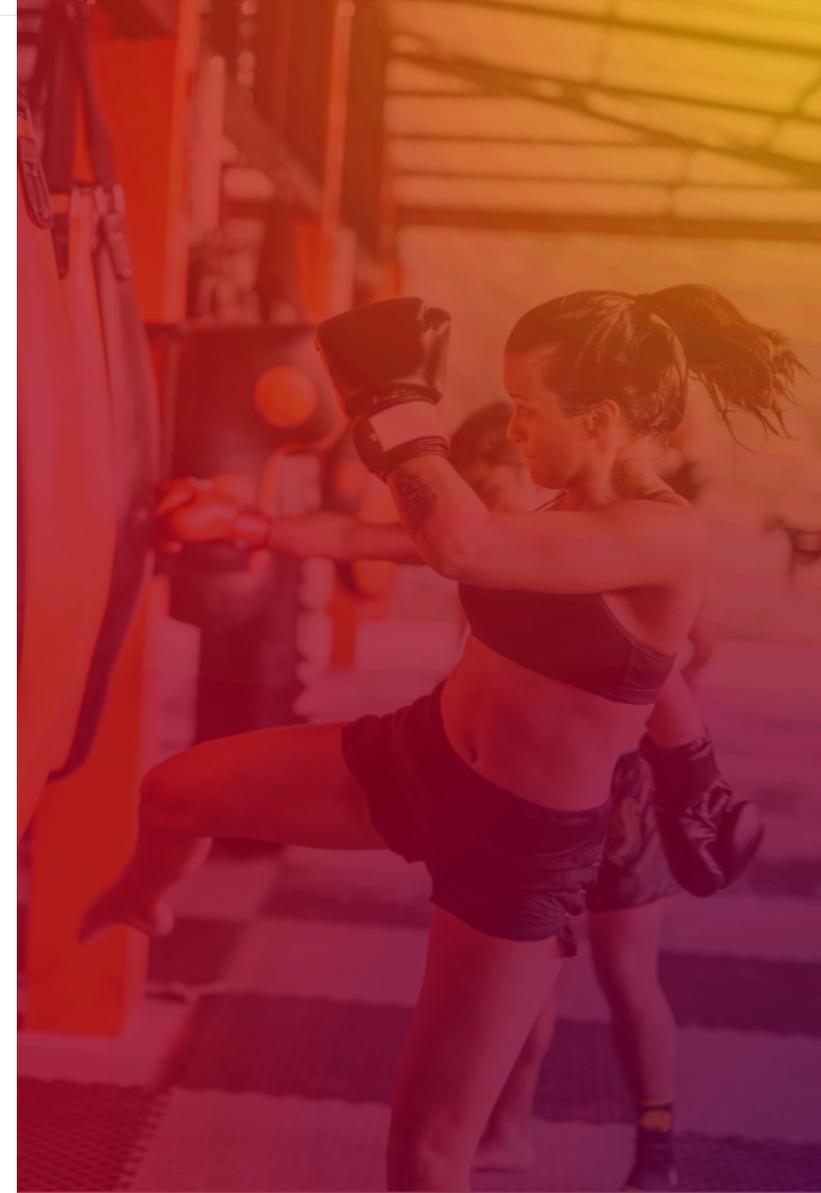
All Club Staff

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

CRHelp

 CRUniversity

 Video On Demand

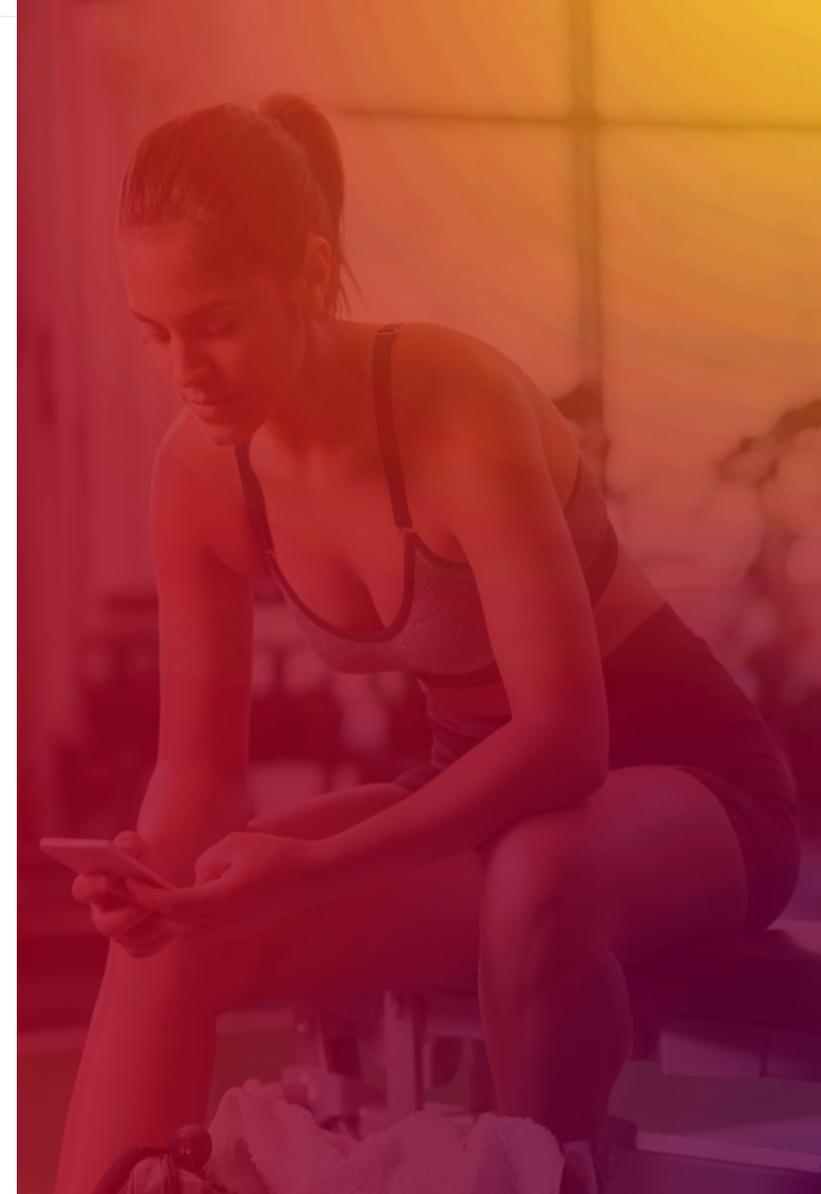
 Training Calendar

 Recent Changes

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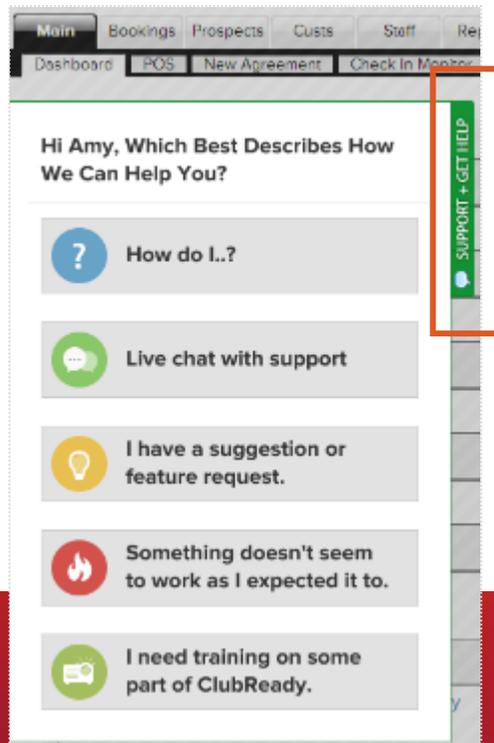
Click the **Help** tab in ClubReady to locate more resources such as:

- **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.



Support + Get Help

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



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



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

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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