ClubReady

StretchMED ClubReady Foundations

User Guide

Table of Contents

Recommended Hardware

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

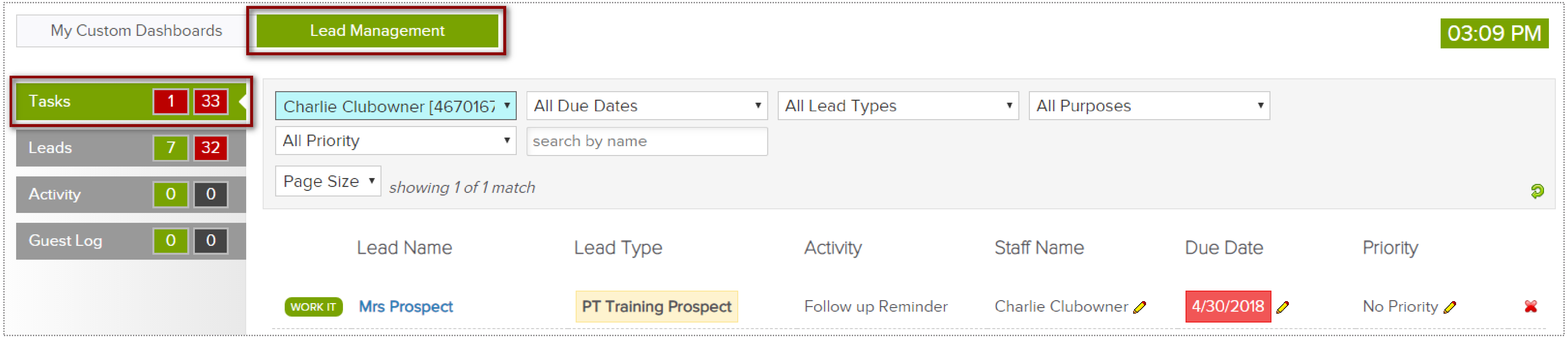
After the units have been received and setup in place please email support@clubready.com to schedule a remote computer setup session.

ClubReady

Lead Management Dashboard

Lead Management Dashboard - Tasks

Main > Dashboard



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

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

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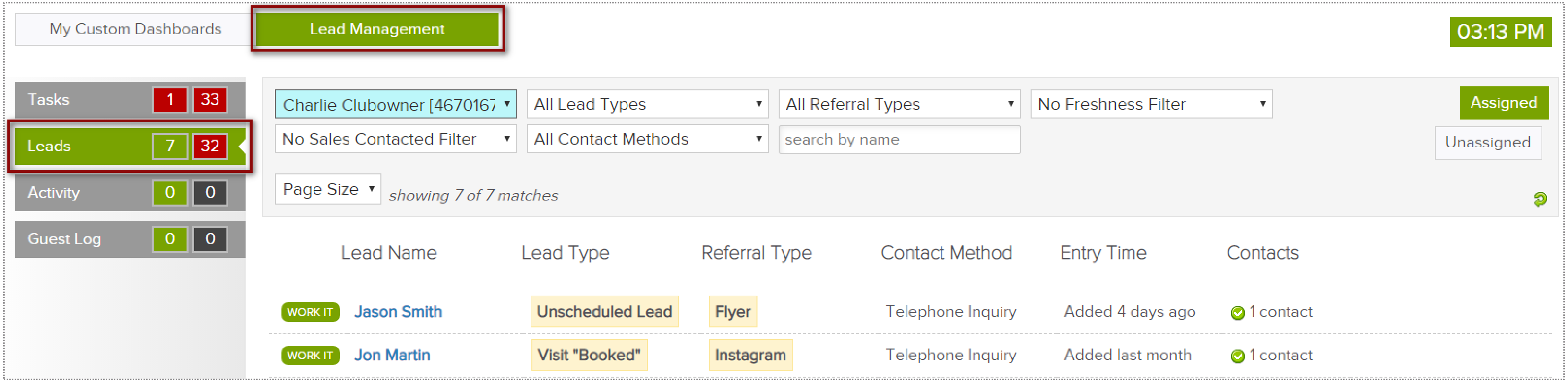
Lead Management Dashboard - Leads

Main > Dashboard



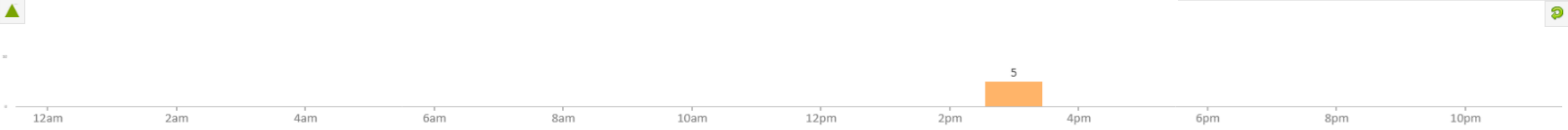
The **Leads** tab will display all of the leads added. The number displayed to the left show leads assigned to the staff member currently logged in. The number displayed to the right show all of the club's leads.

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

Lead Management Dashboard – Activity

Main > Dashboard

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



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

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

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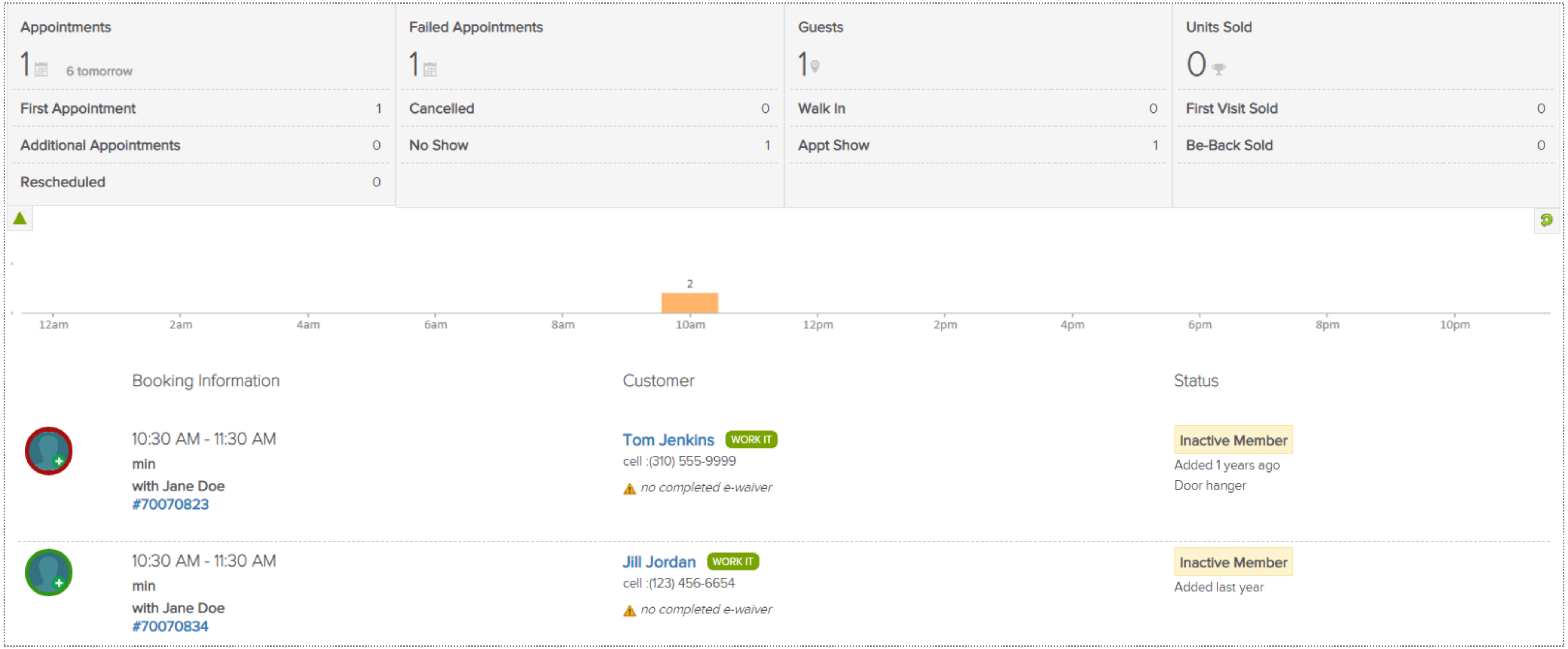
Lead Management Dashboard – Guest Log

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.

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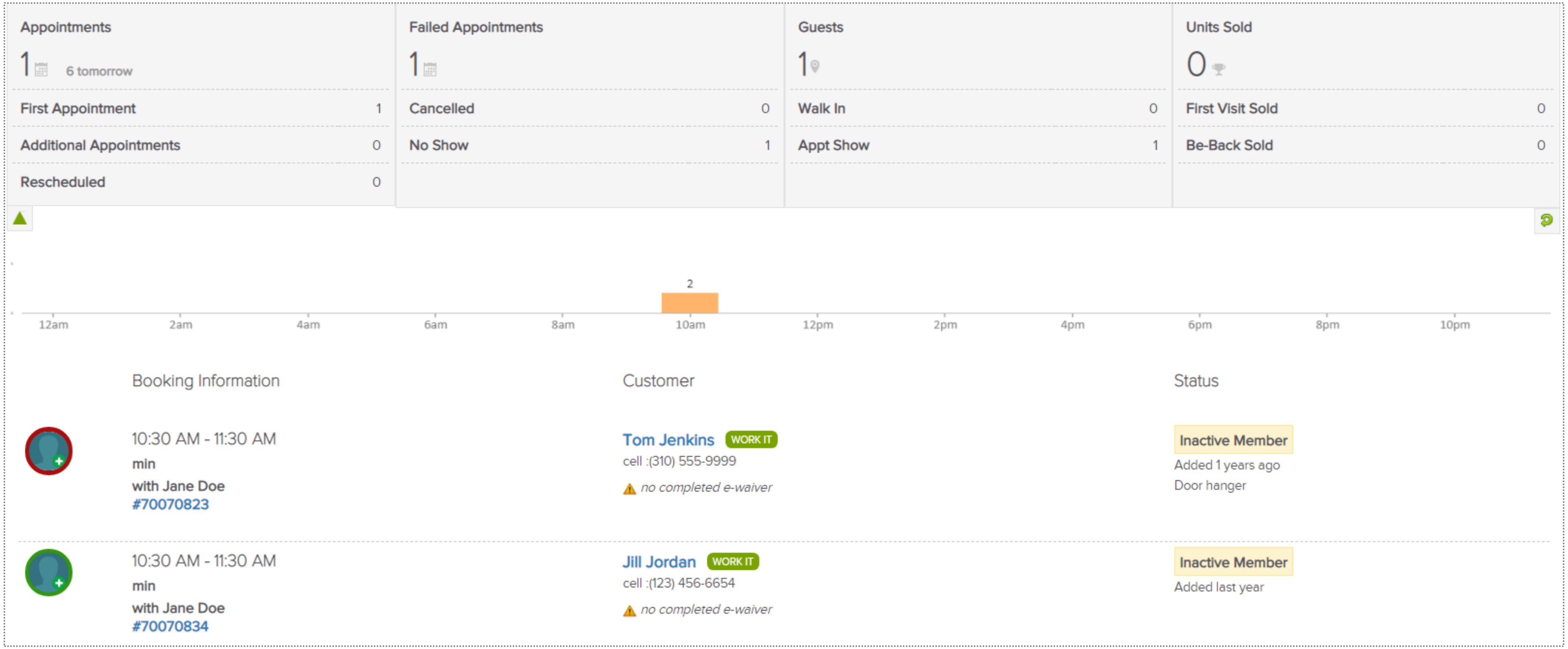
Lead Management Dashboard – Guest Log

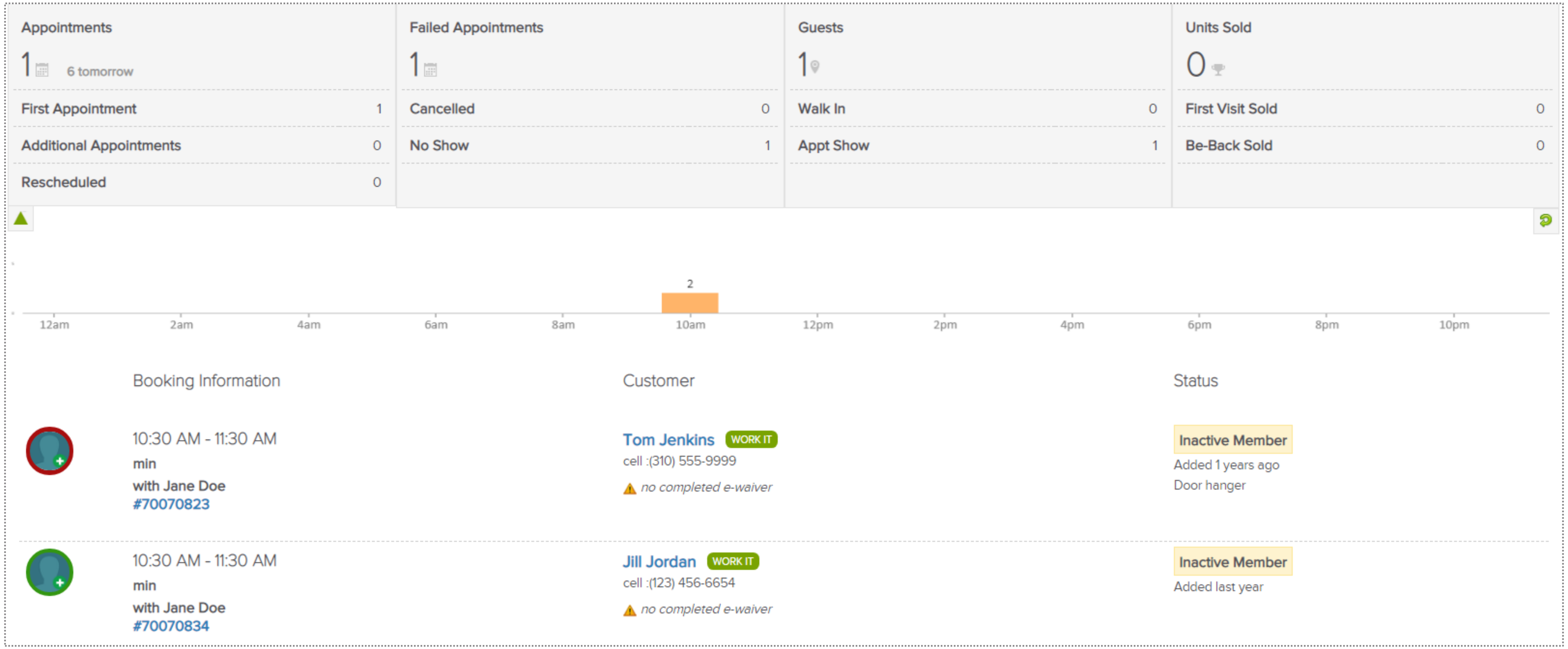
Main > Dashboard



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.

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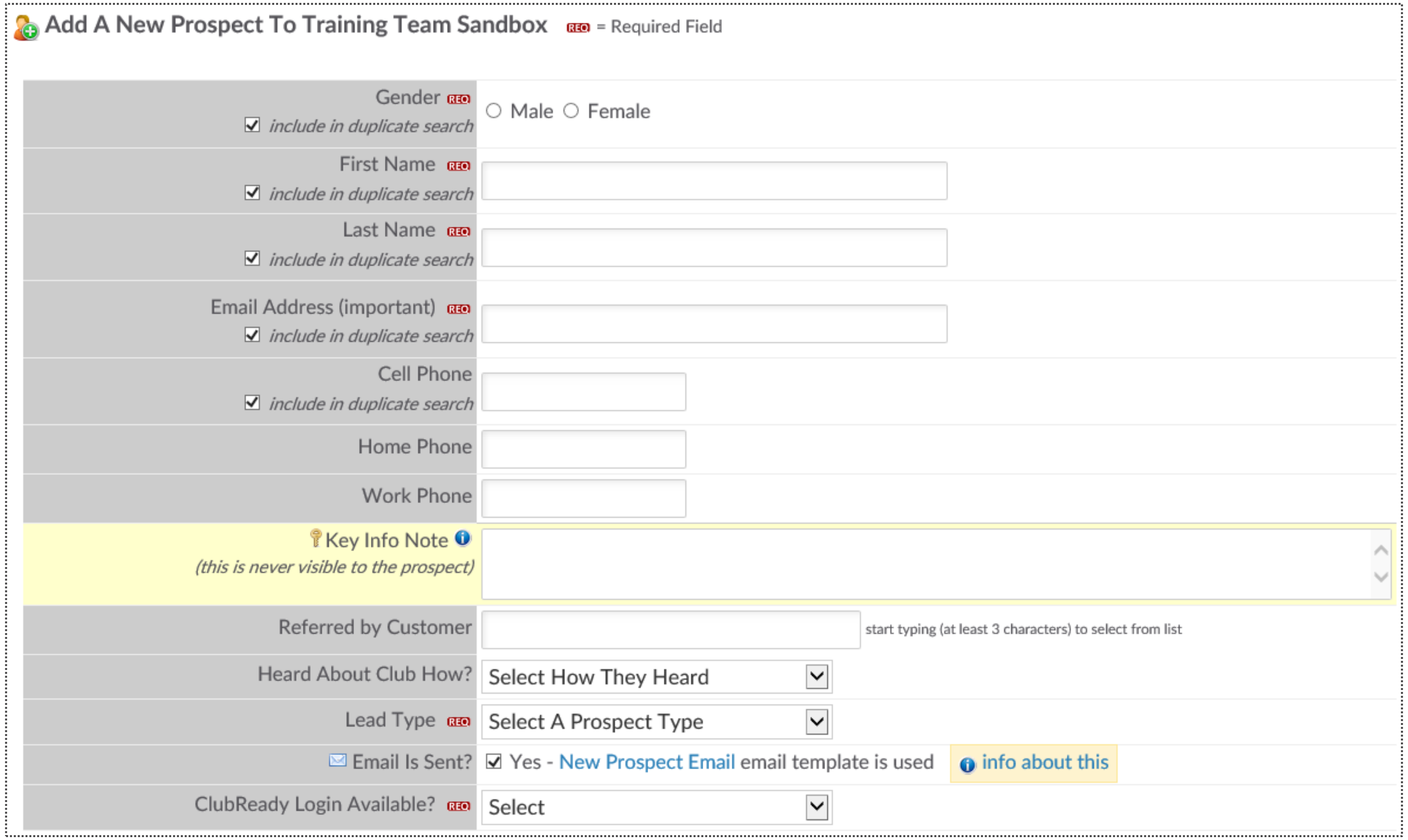
Prospect Management / Tasks / Emails & Texts

Entering a Prospect

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

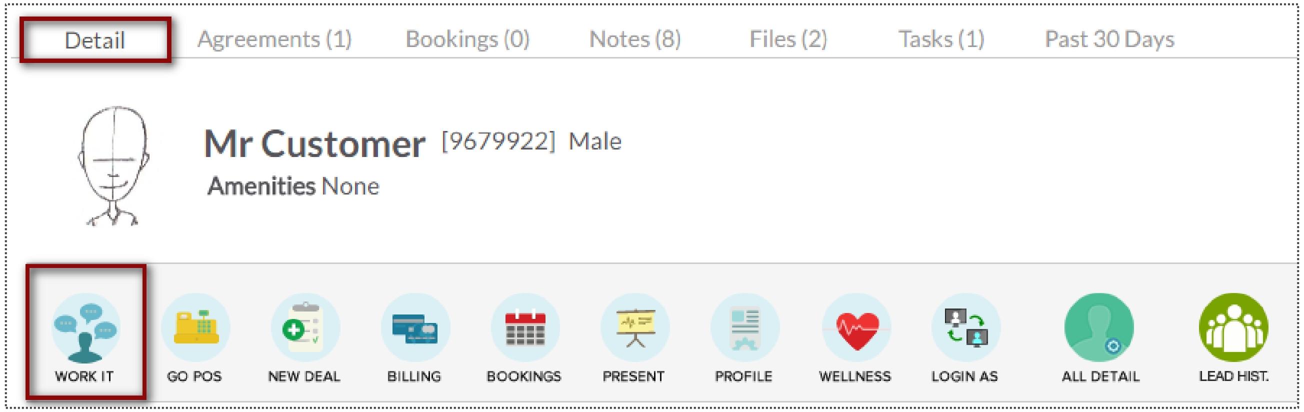

Add A New Prospect To Training Team Sandbox REQ = Required Field

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

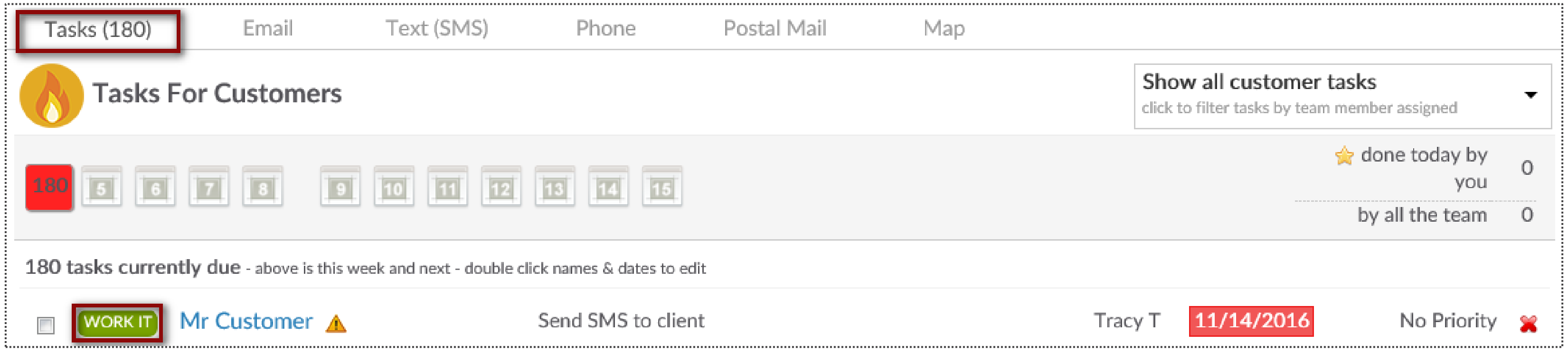
Click on **Prospect > Add New Prospect.** Any fields with the REQ icon will have to be completed to save your prospect.

Access the Work It

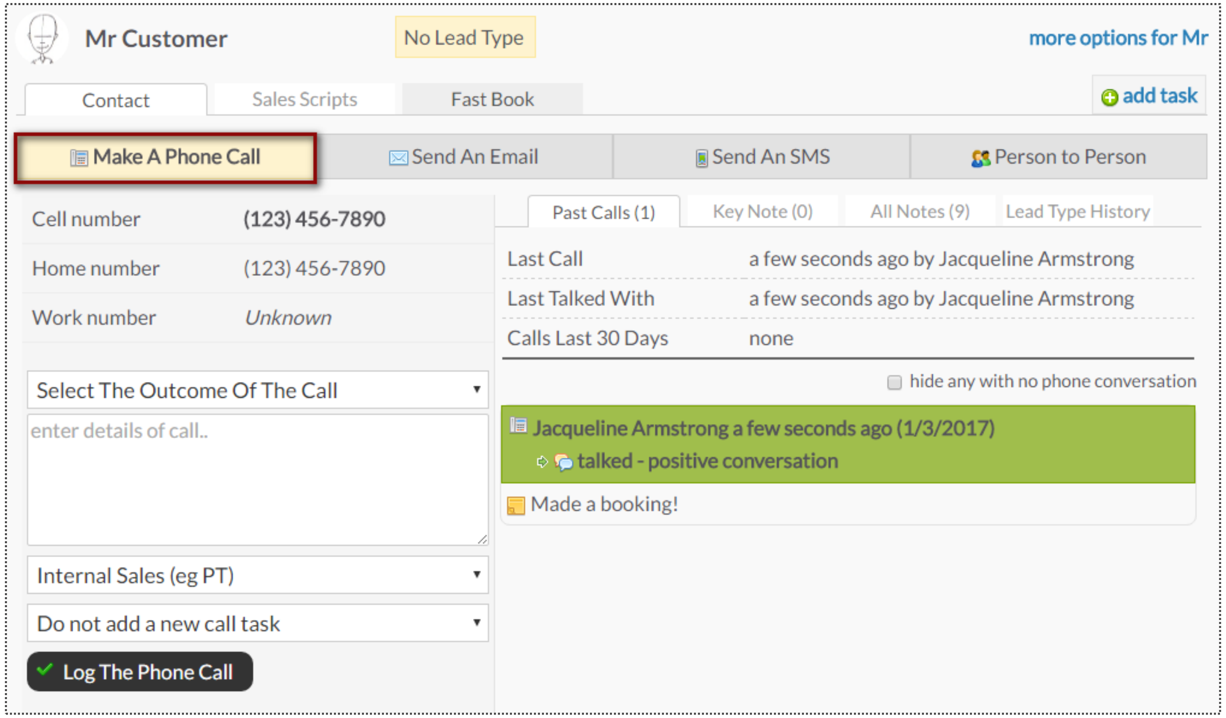
Prospects/Members tab > Tasks



OR



Work It – Phone Calls



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

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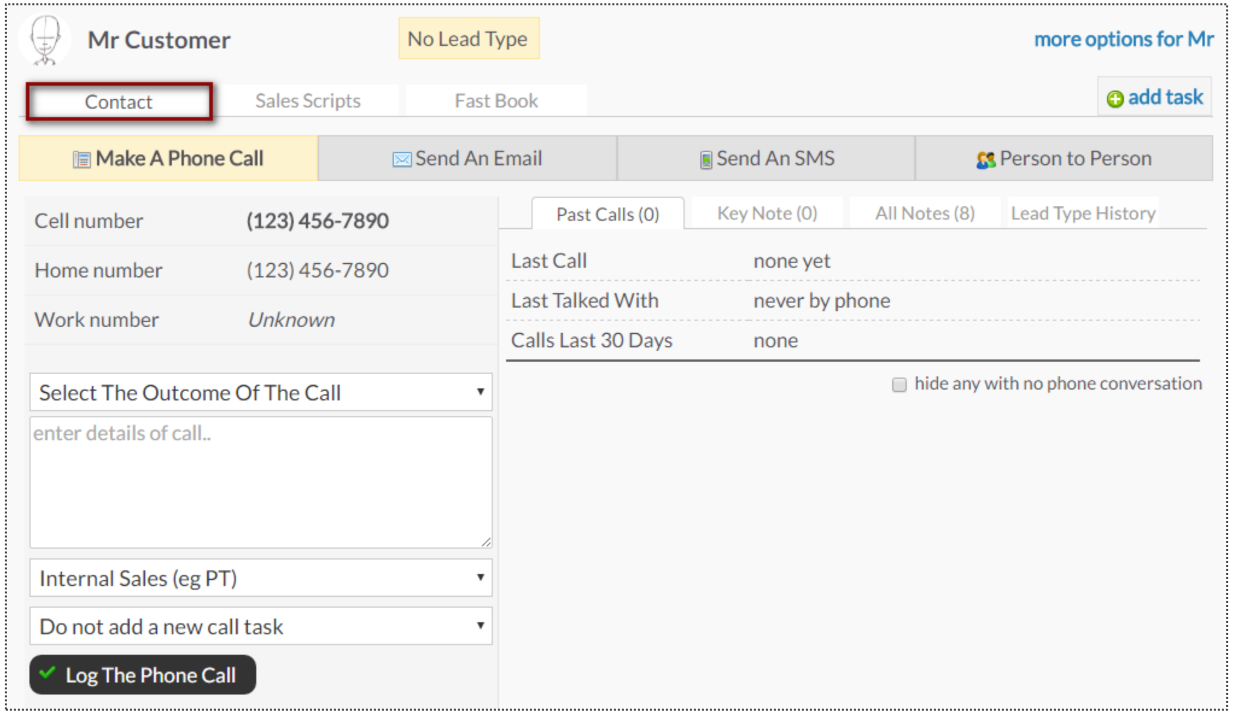
Work It - Contact



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

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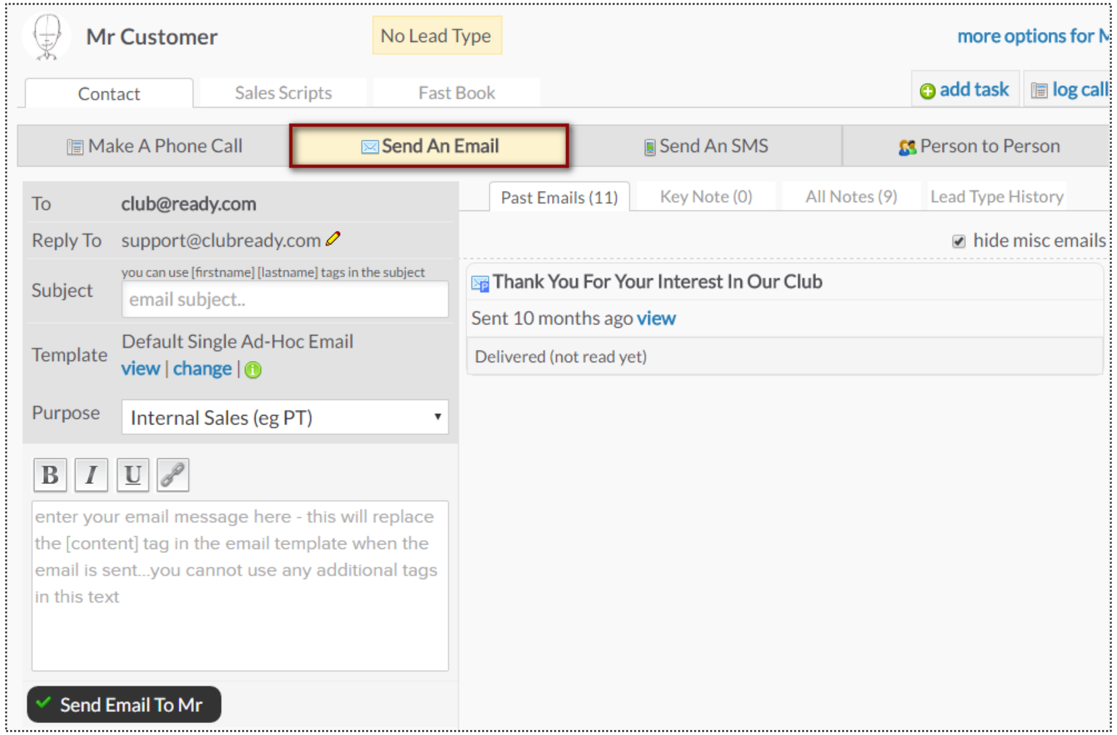
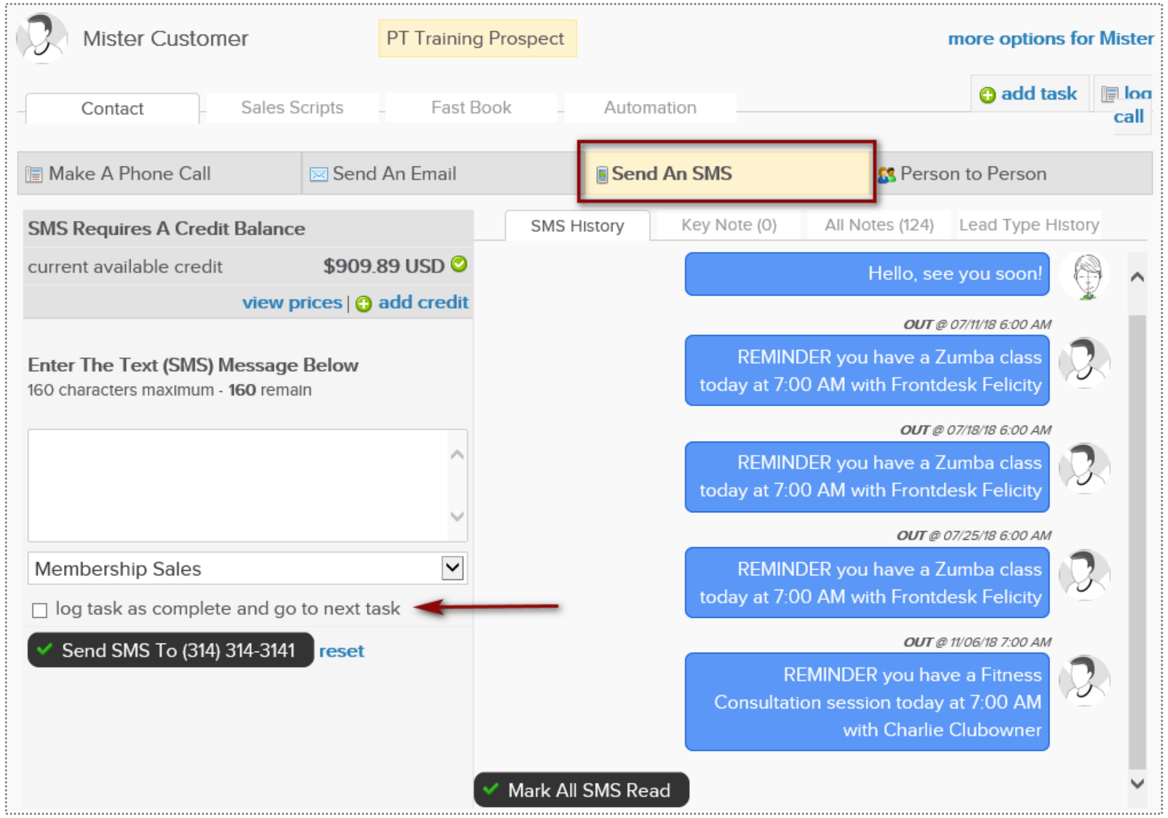
Work It – Emails



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)



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

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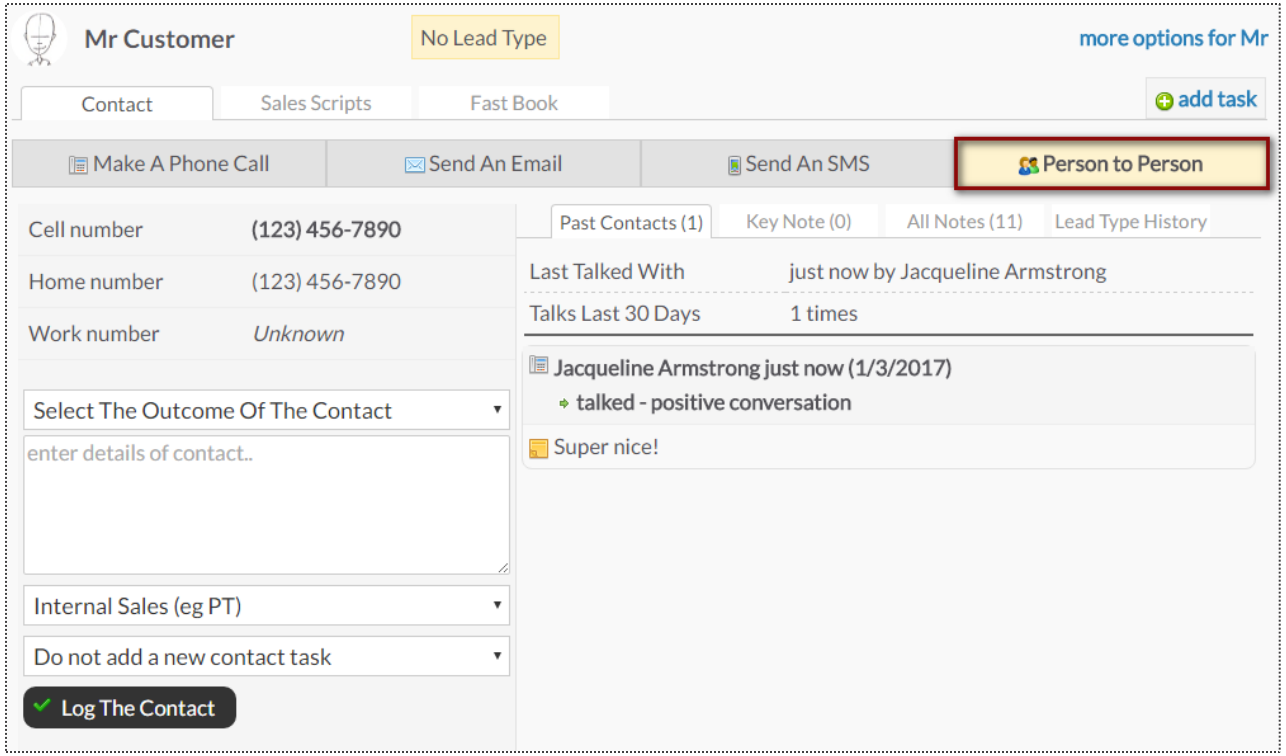
Work It – Person to Person



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

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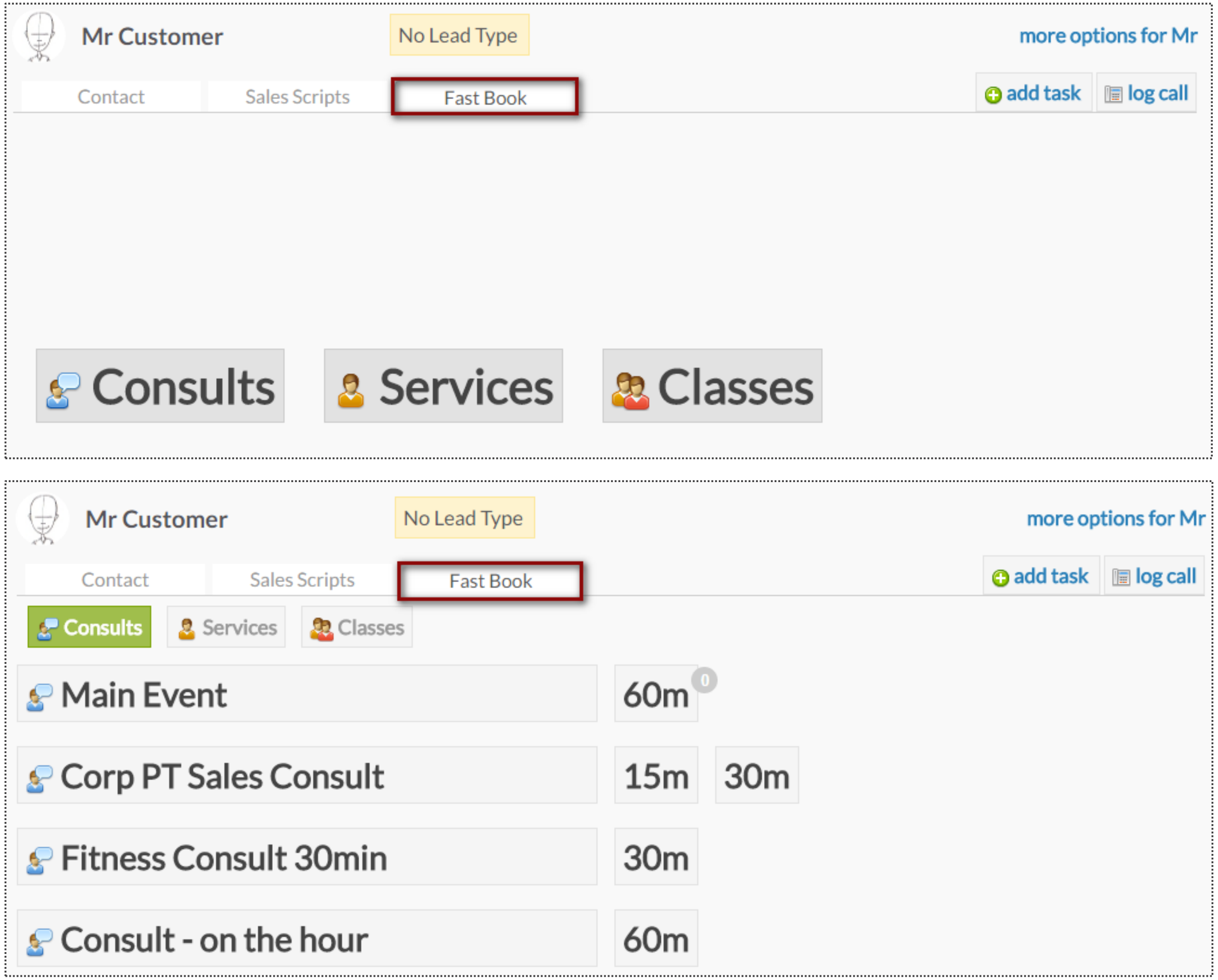
Work It – Fast Book



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.

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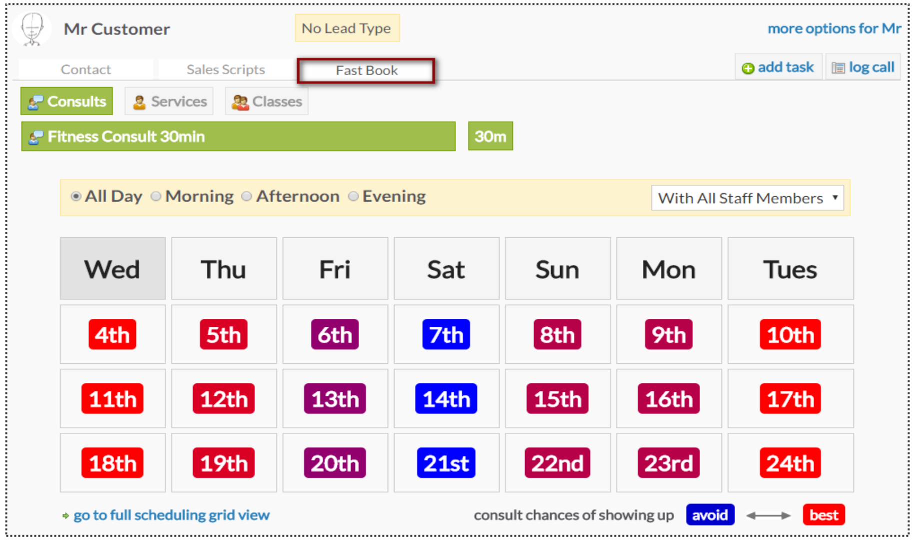
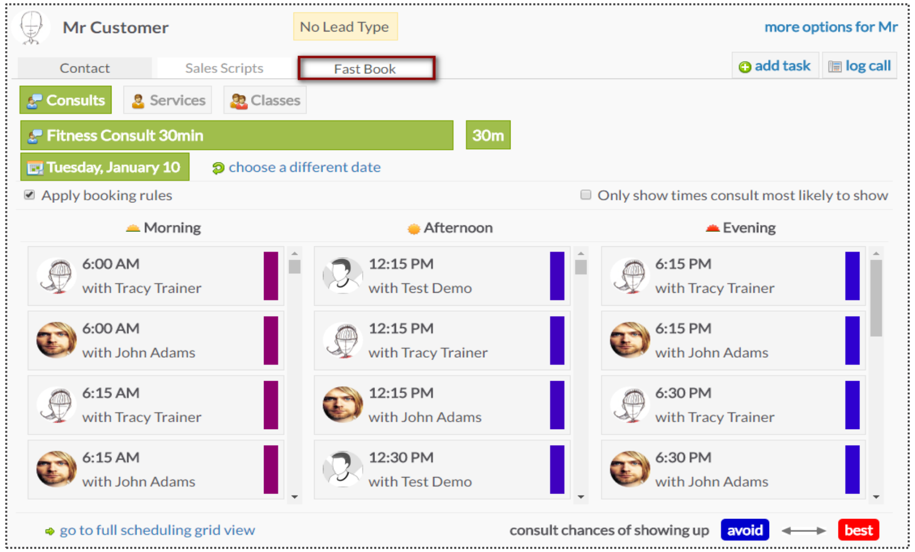
Work It – Fast Book

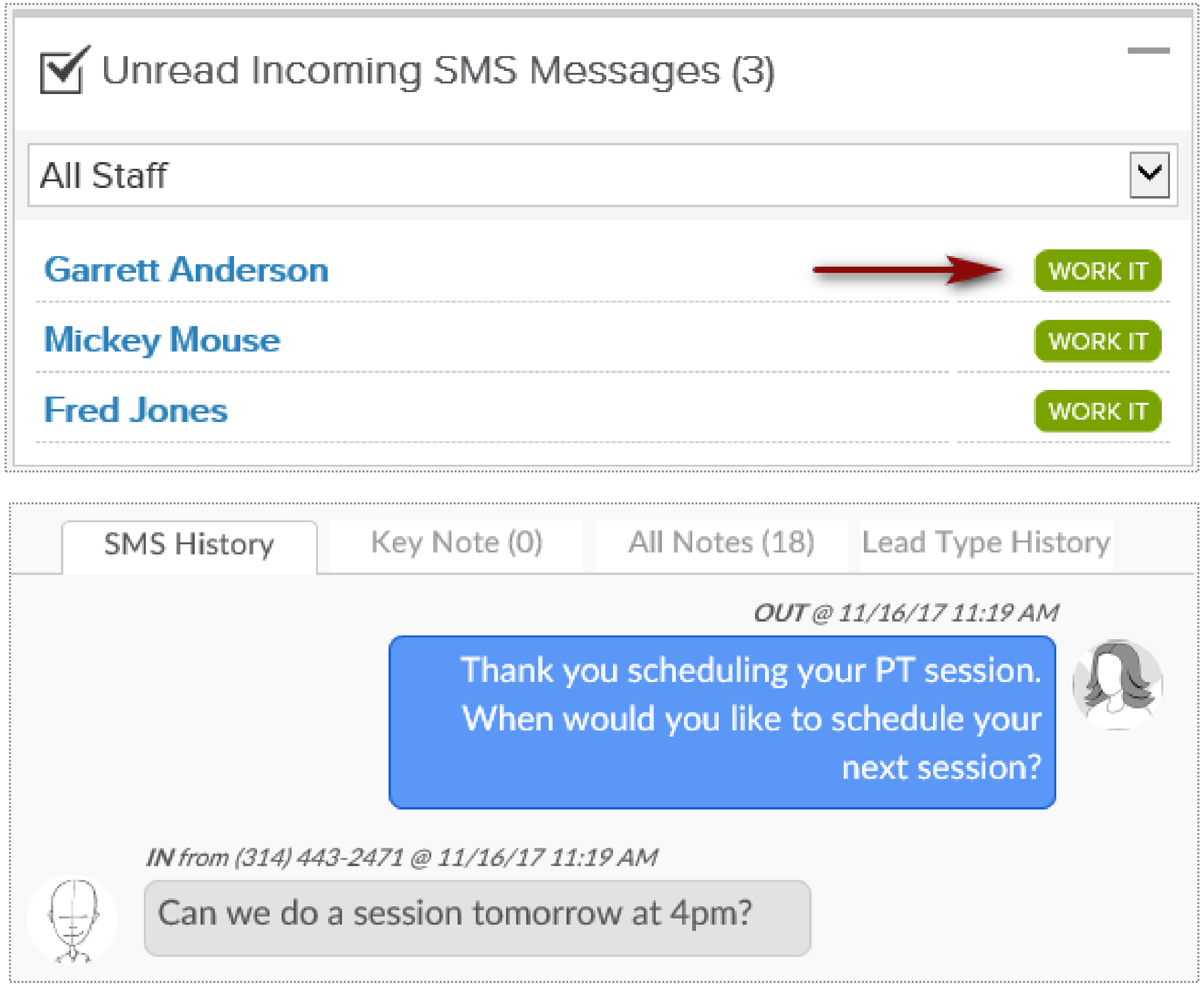




Once you've selected the type of service, you can then select the client's preference for a morning, afternoon or evening appointment, as well as the trainer.

Widget – Unread Incoming SMS

Main > Dashboard



All Staff Dropdown Menu - This will show you all of your staff members. You will be able to view the texts that are replies to a specific staff member or across all staff.
Select Customer - if you click the customer name in blue from your list, you will be taken to the customer's profile all detail view.
Work It - By clicking on the **Work It** button, you will be able to access the work it tool. This will take you directly the **Send SMS (Text Message)** option, where you will see the history of texts.

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

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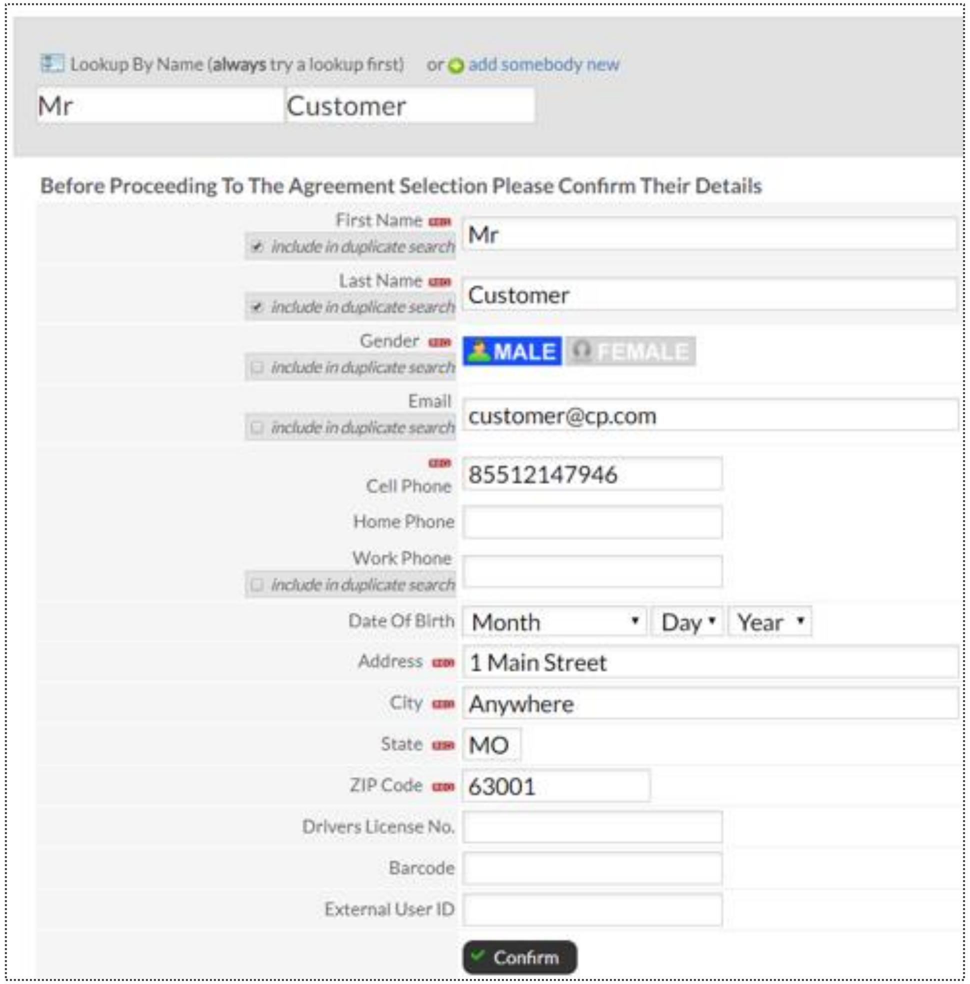
Agreement Write Up

Write Up New Agreement – Search For User

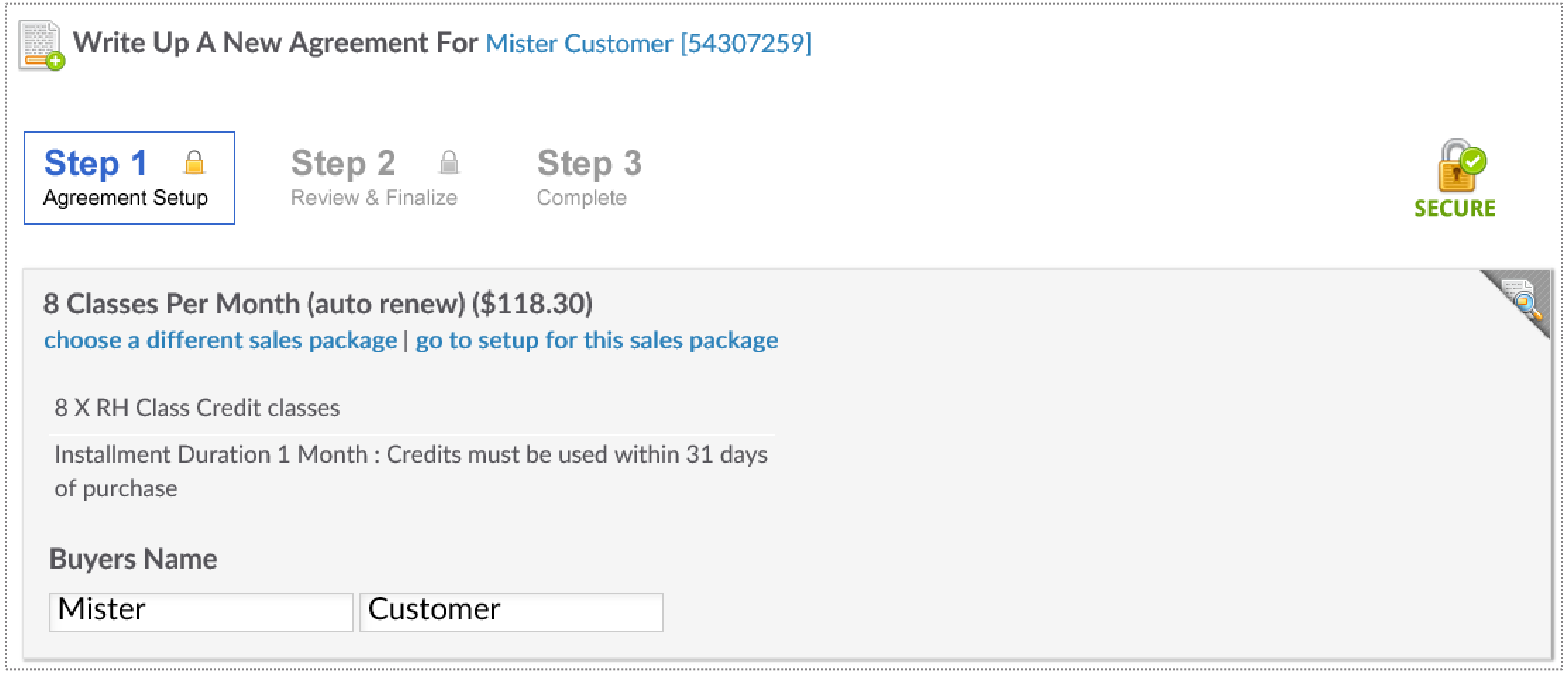
Main > Write up New Agreement > Search for client



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



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.

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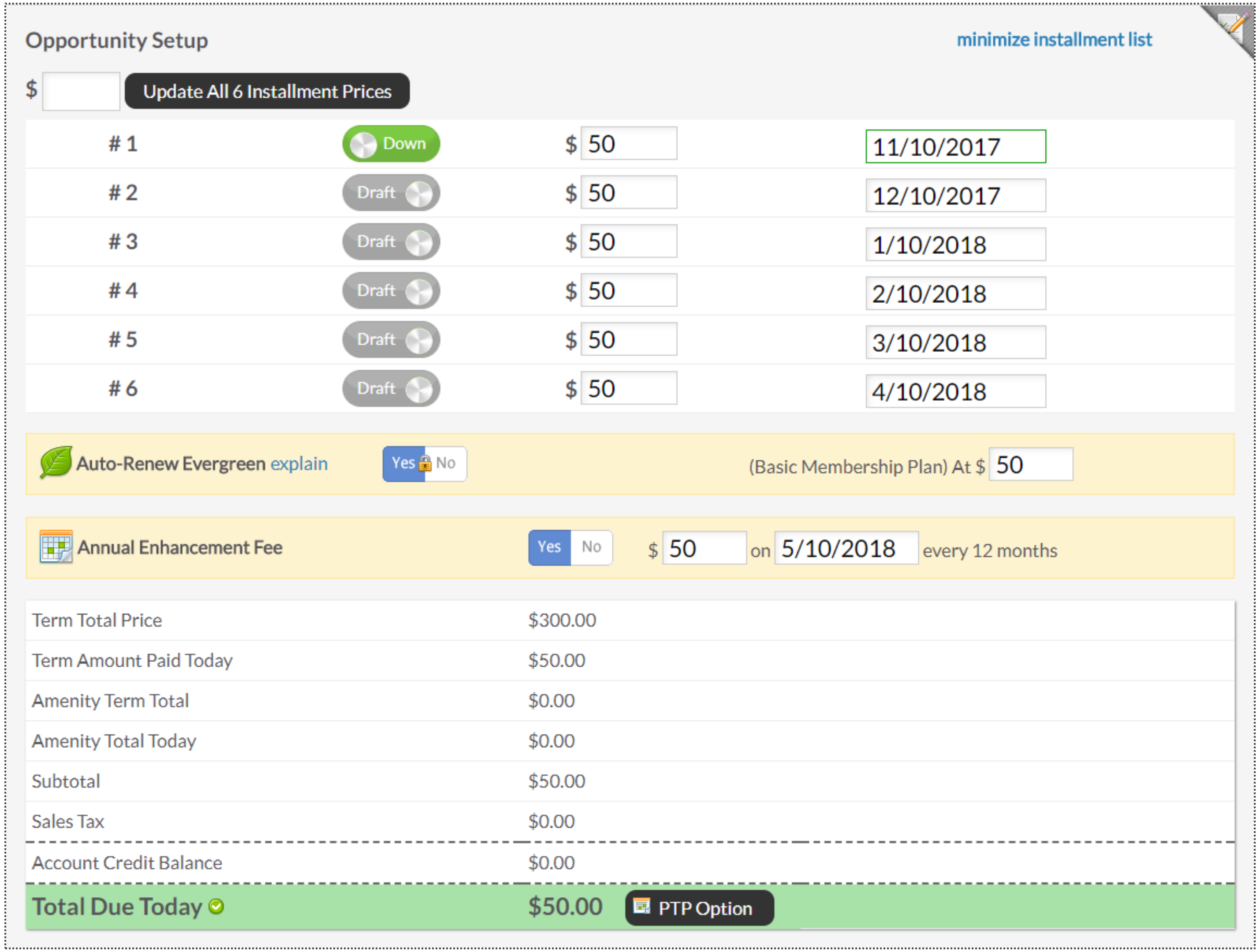
Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates



Opportunity Setup - Shows initial planned payments and their due dates. You have the option to adjust both the amount coming due and their due dates.
Auto-Renew Evergreen - The status of an auto-renew agreement will be detailed here. Select **No** if the customer does not want this agreement to be on Auto-Renew.
Enhancement Fee - If an Enhancement Fee is included in this package it will be detailed here.

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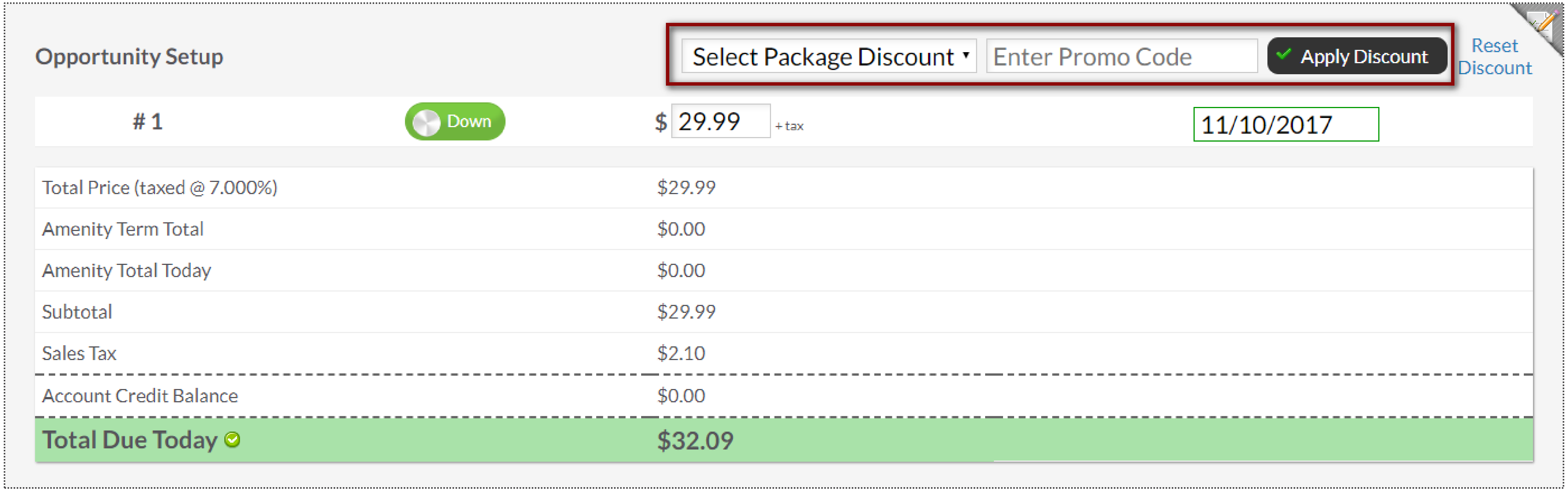
Apply a Package Discount

Select Plan > Adjust Pricing & Pay Dates



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**.

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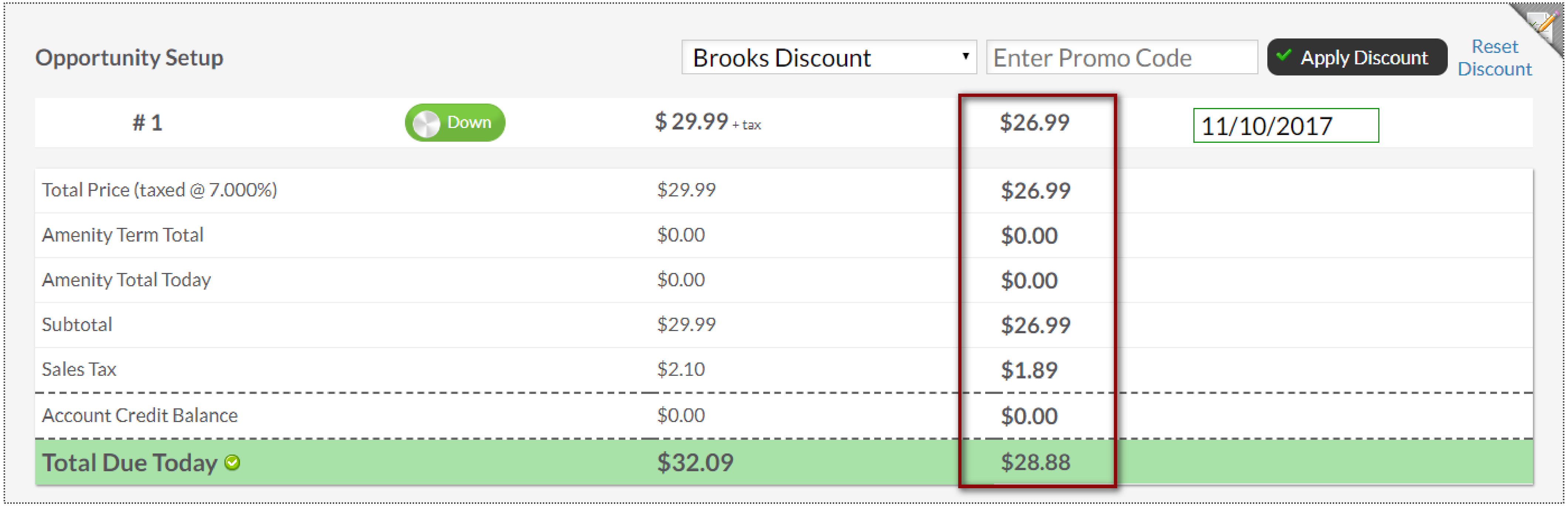
Apply a Package Discount

Select Plan > Adjust Pricing & Pay Dates



Once applied, it will automatically display the discount.

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Write Up New Agreement

Assigning Sales Commission & Member Contact

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

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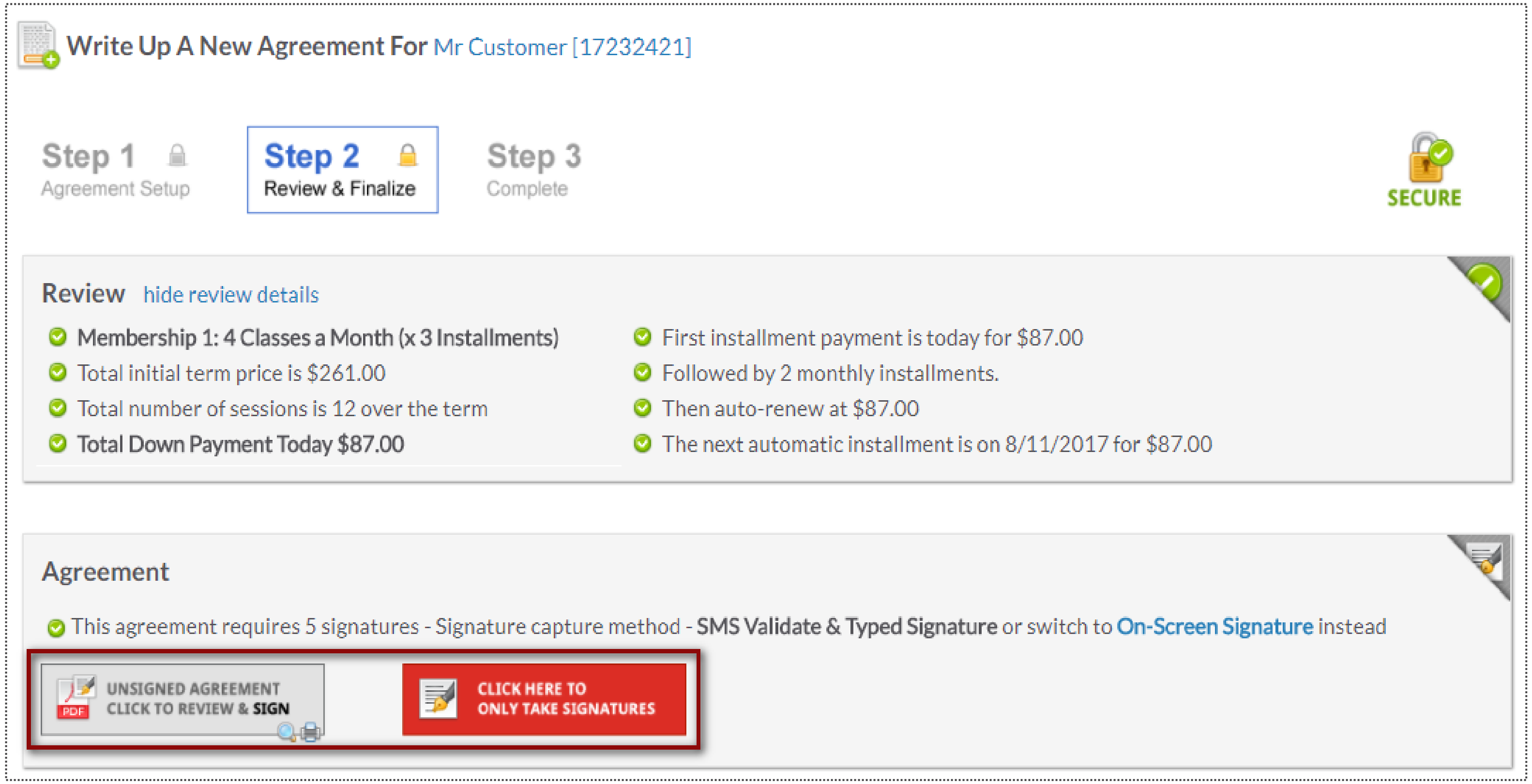
Write Up New Agreement

Review Terms > Take Signatures

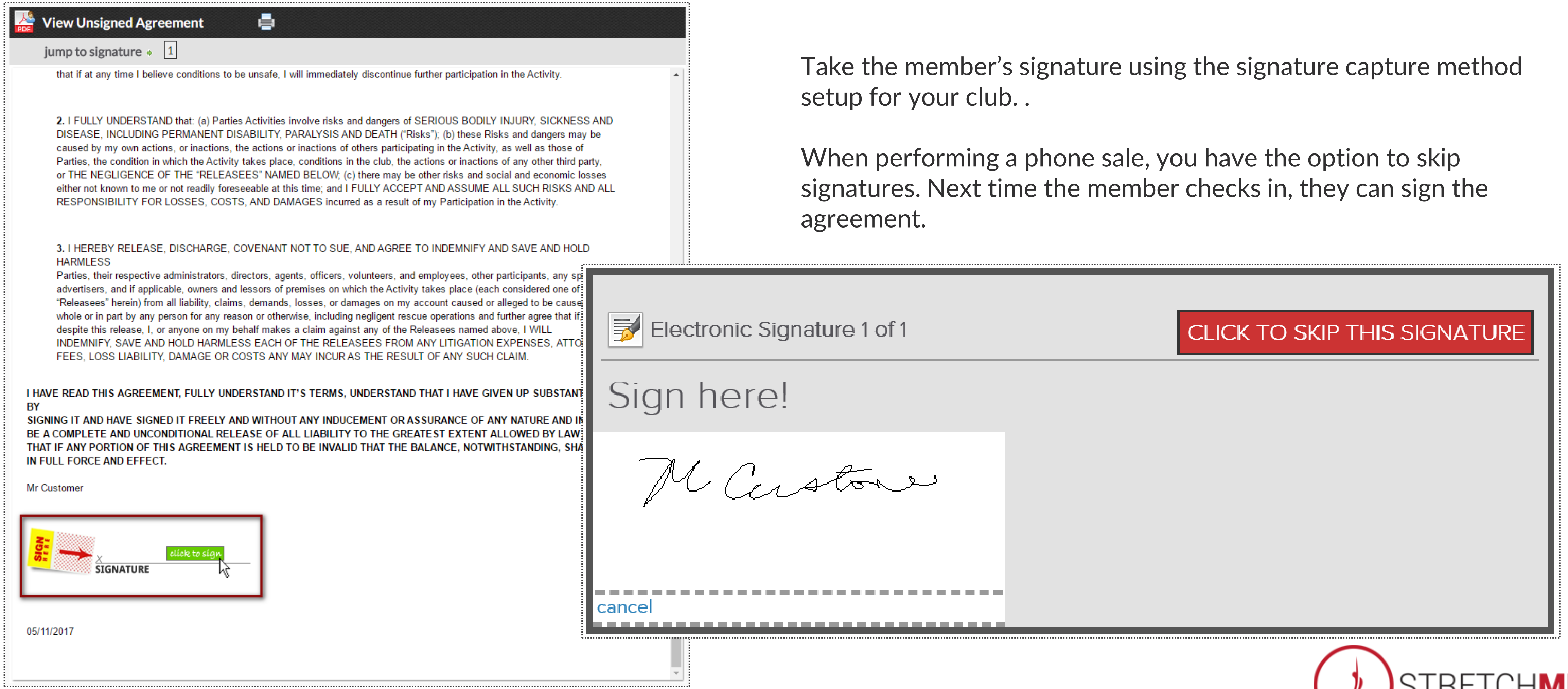


Take a minute to review the terms of the agreement and confirm they are accurate.

Select here to open full agreements for signatures.

Taking Signatures

Review Contract & Take Signatures



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

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

3. I HEREBY RELEASE, DISCHARGE, COVENANT NOT TO SUE, AND AGREE TO INDEMNIFY AND SAVE AND HOLD HARMLESS
Parties, their respective administrators, directors, agents, officers, volunteers, and employees, other participants, any sp advertisers, and if applicable, owners and lessors of premises on which the Activity takes place (each considered one of "Releasees" herein) from all liability, claims, demands, losses, or damages on my account caused or alleged to be cause 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, ATTO 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 SUBSTANT BY
SIGNING IT AND HAVE SIGNED IT FREELY AND WITHOUT ANY INDUCEMENT OR ASSURANCE OF ANY NATURE AND IN 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, SHA 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.

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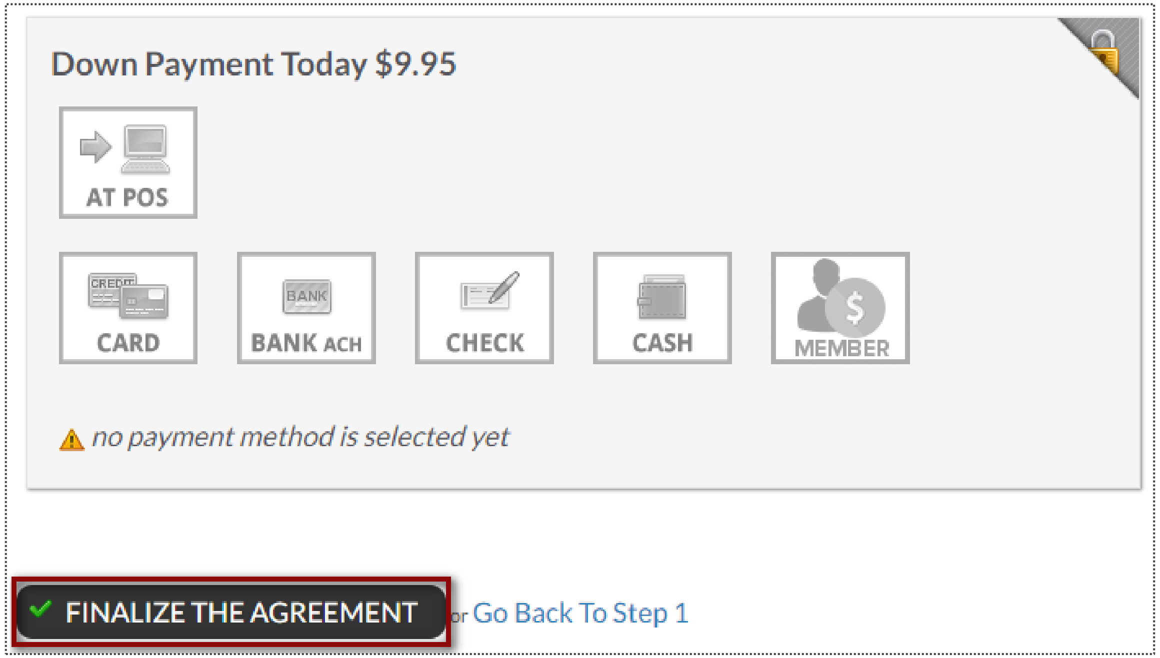
Writing a Membership Agreement

Take Payment & Finalize the Deal



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’.

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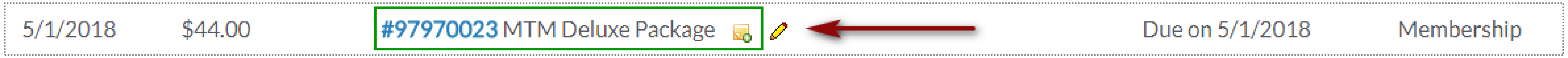
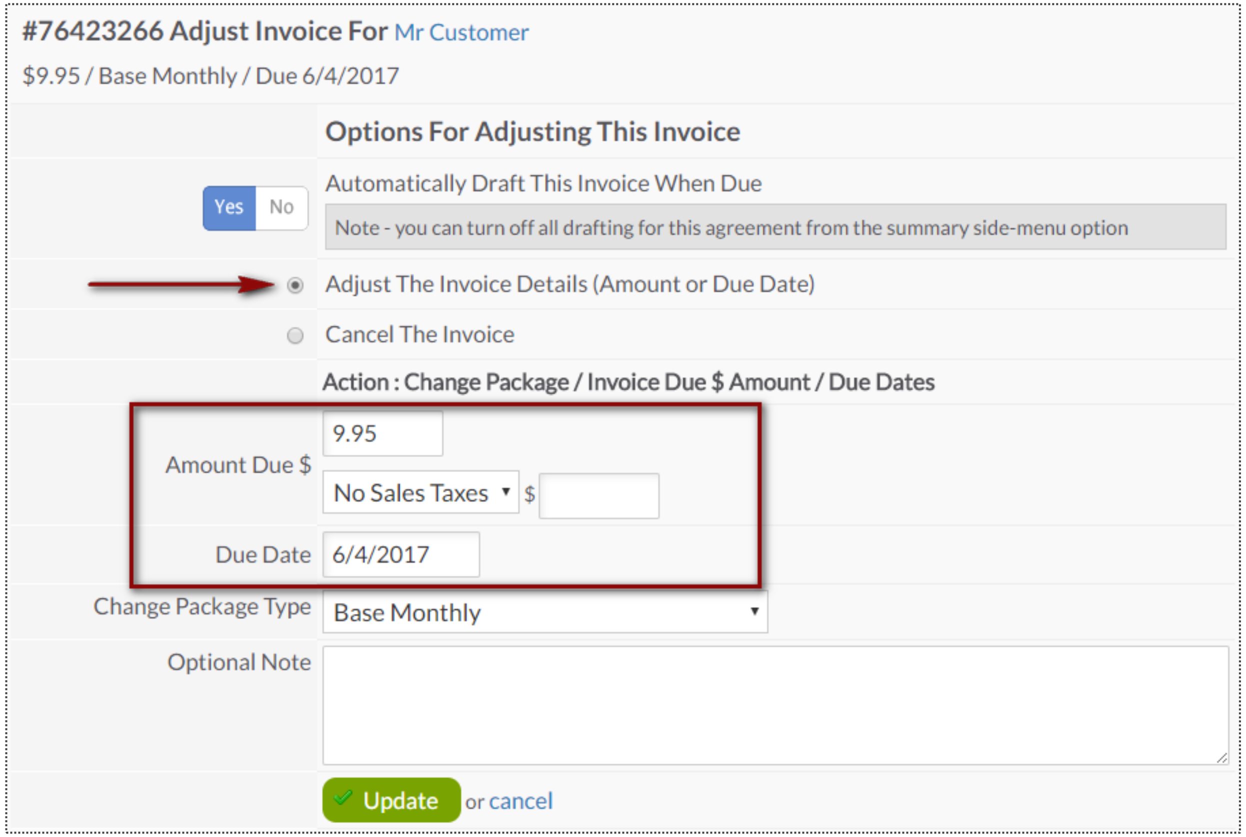
Member Management

Invoice Adjustments

Member > Billing > Invoices > Edit Pencil





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

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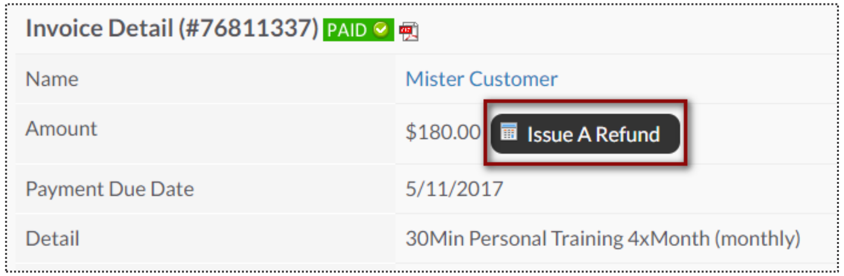
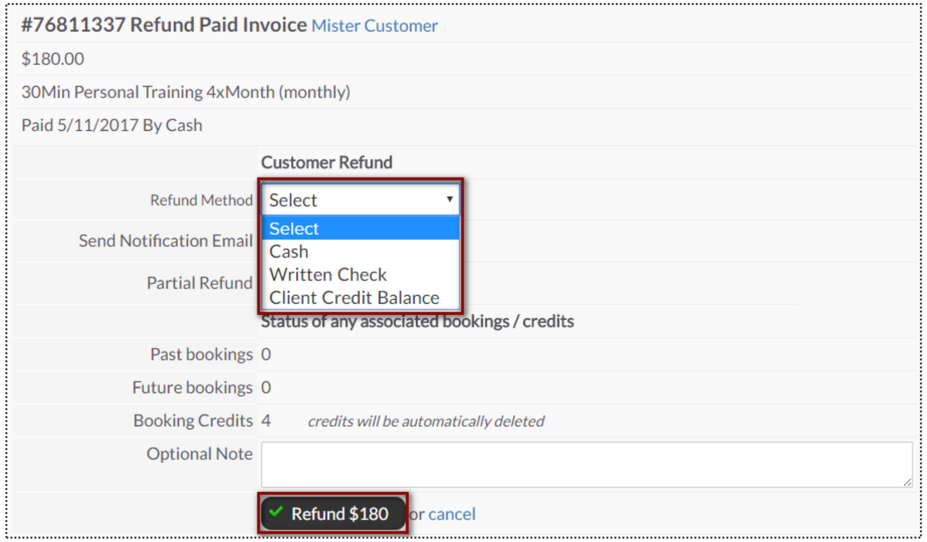
Refund an Invoice

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



Invoice Detail (#76811337) PAID	
Name	Mister Customer
Amount	$180.00 Issue A Refund
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
	Select Cash Written Check Client Credit Balance
Send Notification Email	
Partial Refund	
	Status of any associated bookings / credits
Past bookings	0
Future bookings	0
Booking Credits	4 *credits will be automatically deleted*
Optional Note	
	Refund $180 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.

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Adding a New Invoice

Member > Billing > Invoices

Once you are on the Billing screen, click the **Add A New Invoice** button.

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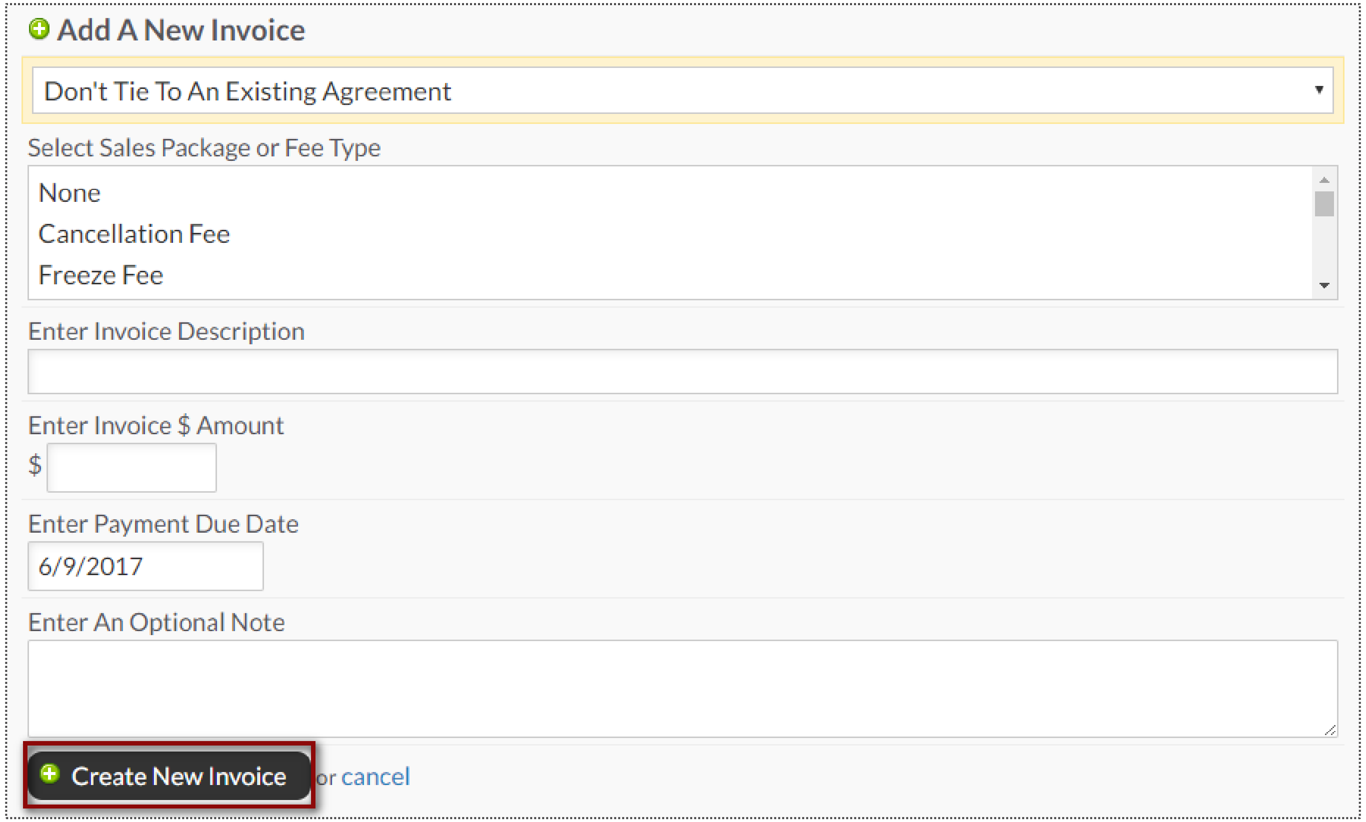
Adding a New Invoice

Member > Billing > Invoices > Add A New Invoice



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

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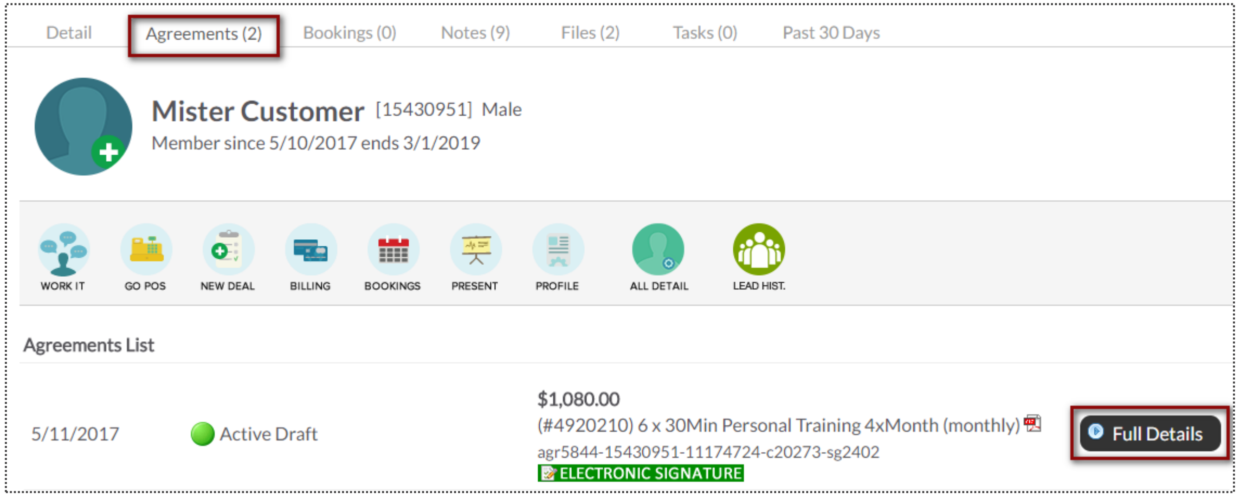
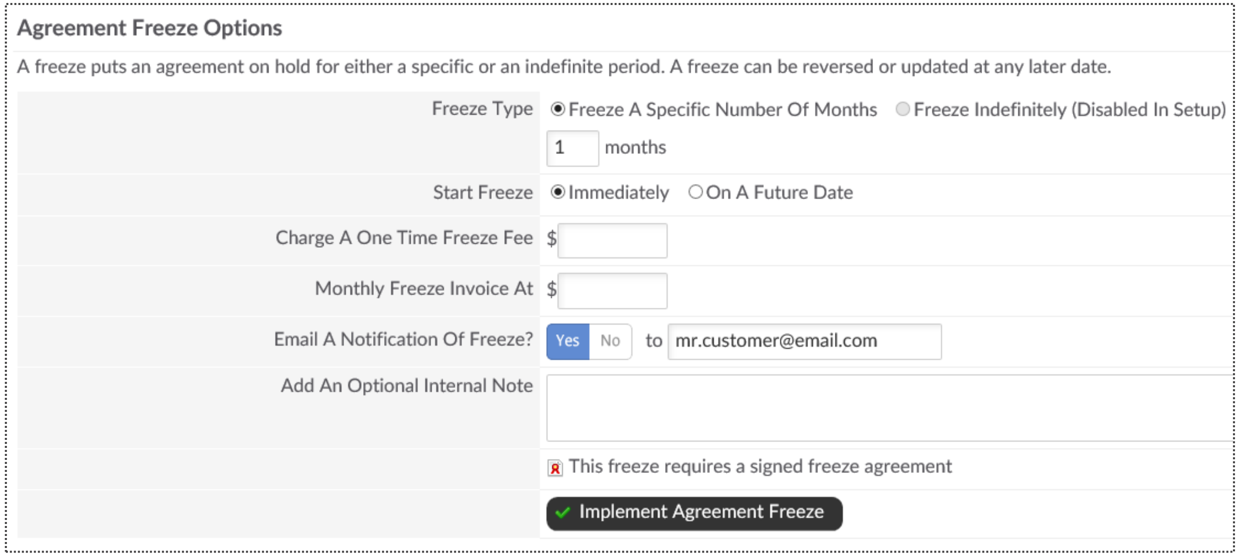
Freeze an Agreement

Member Account > Agreements > Full Details > Freeze Options



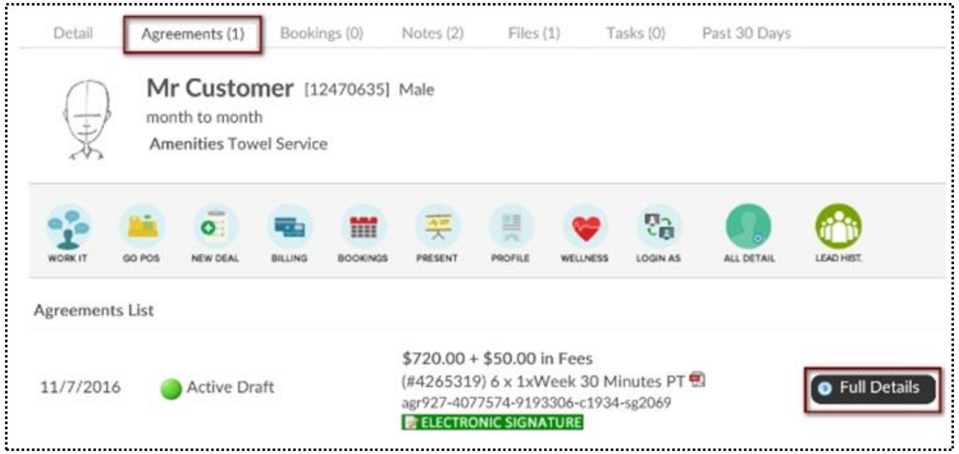


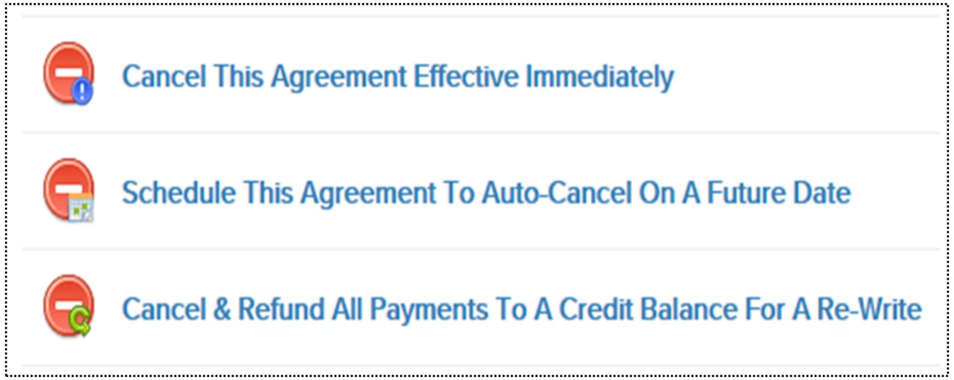
From this screen you can select the following: **Freeze Type, Start Freeze, Charge A One Time Freeze Fee / Monthly Freeze Invoice, Membership Expiration, Email Notification of Freeze.**

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

Cancel an Agreement

Member Account > Agreements > Full Details > Cancel This Agreement





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.

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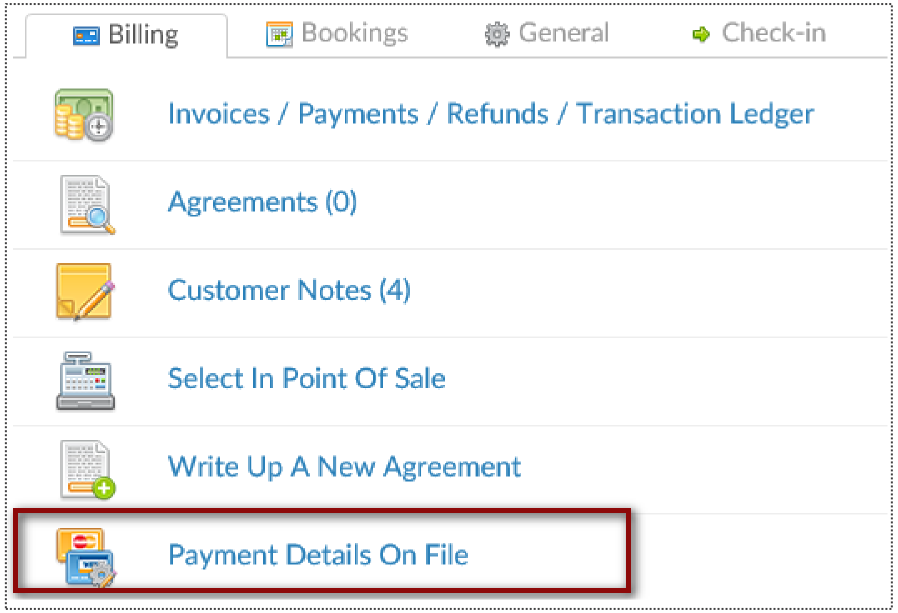
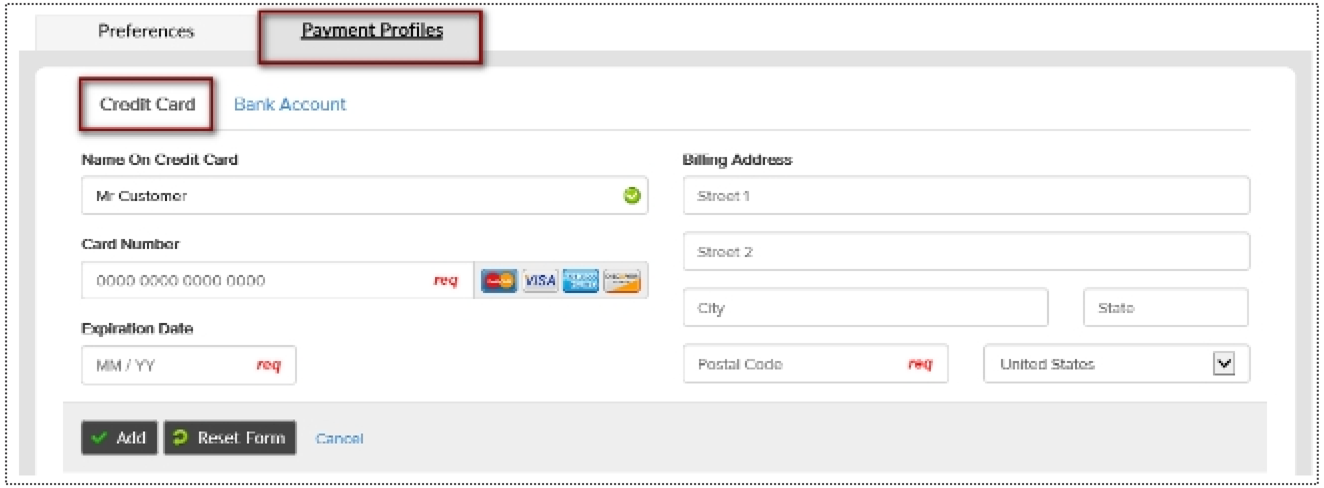
Add/Update Credit Card on File

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



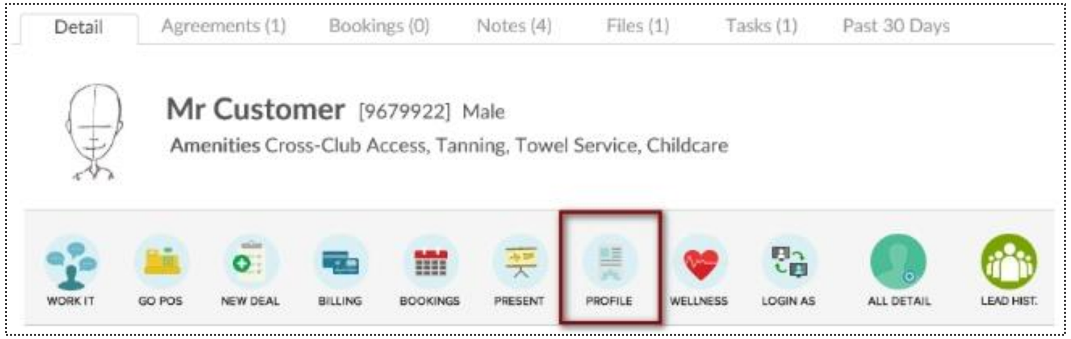
To add a new credit card select **New Payment Profile** button. Click on Credit Card tab to enter the client's credit card information. Select the **Add** button to save the information. If you just need to update the expiration date click the edit pencil next to the existing payment profile.

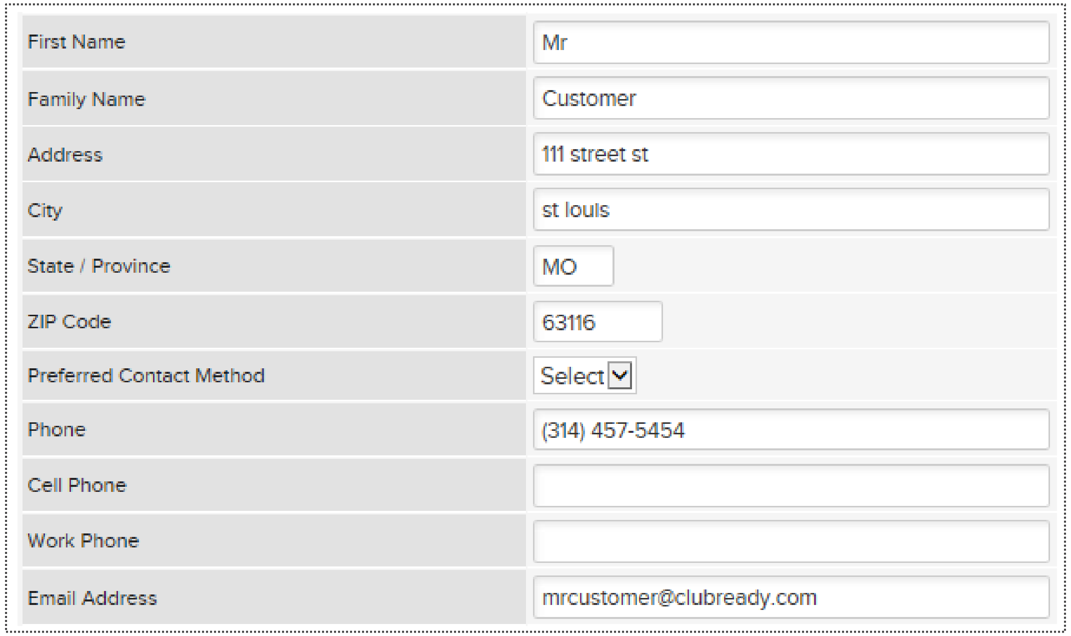


To add a new bank account select the **New Payment Profile** button. Click on Bank Account tab to enter the client's bank account information. Select the **Add** button to save the information.

Update Member's Profile

Member Account > Profile





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

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

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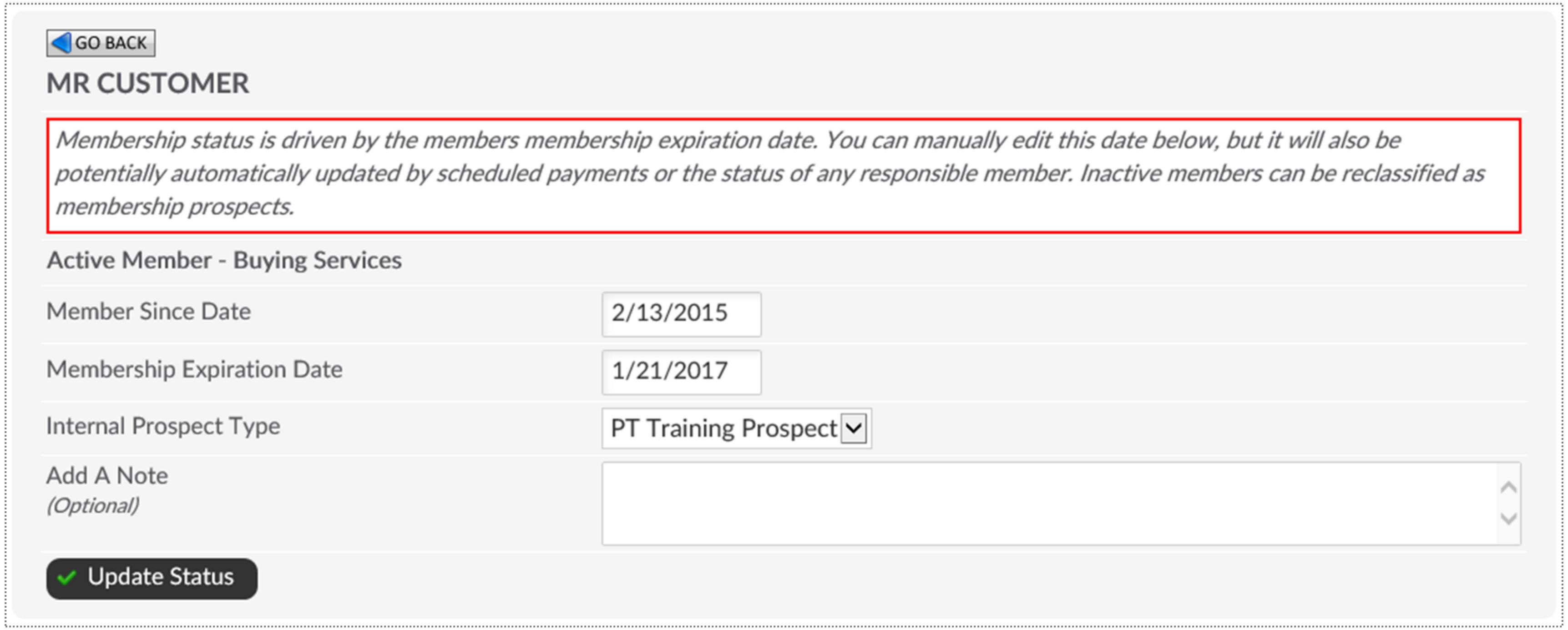
Edit Membership Status

Member Account > All Detail > General > Edit Membership 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.

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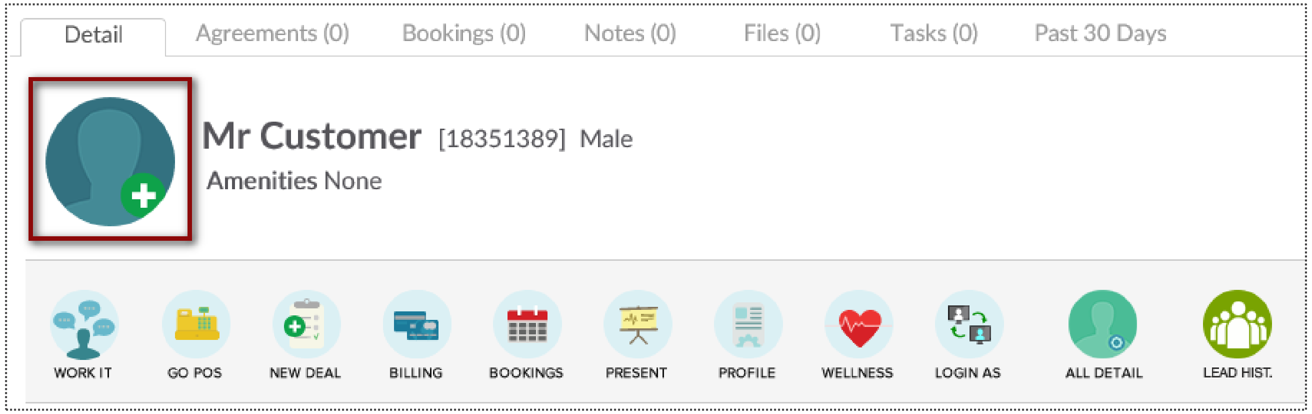
Add A Photo

Member Account > Green Plus Sign



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

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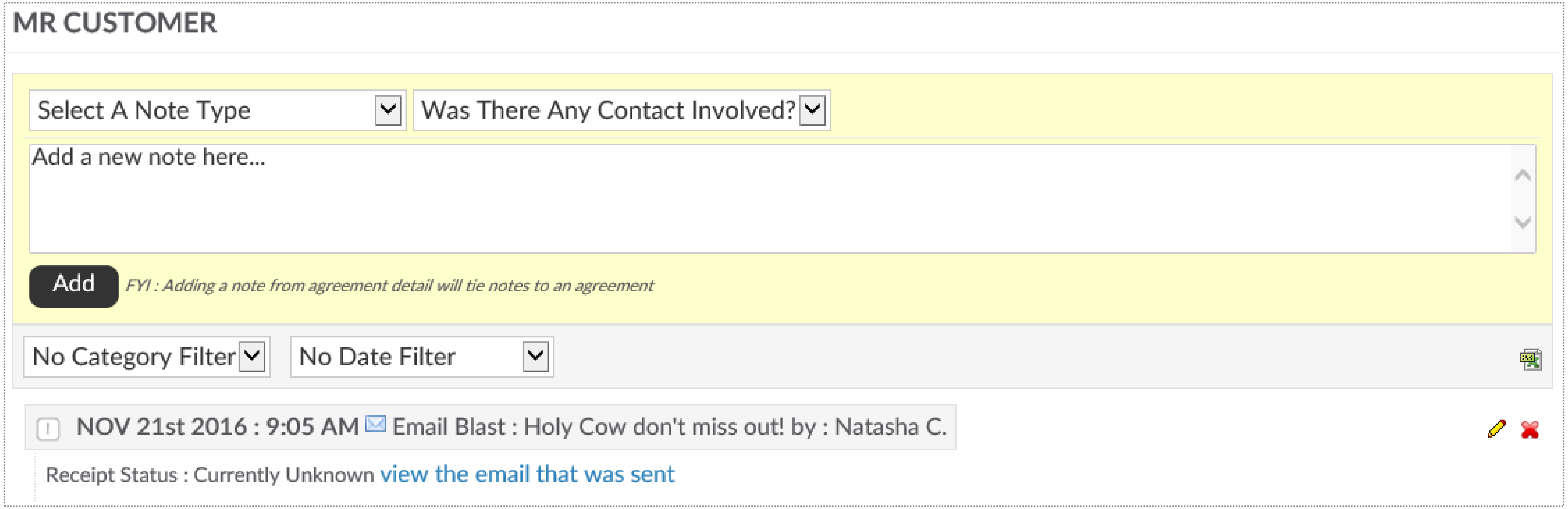
Member Notes

Member Account > All Detail > Member Notes



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.

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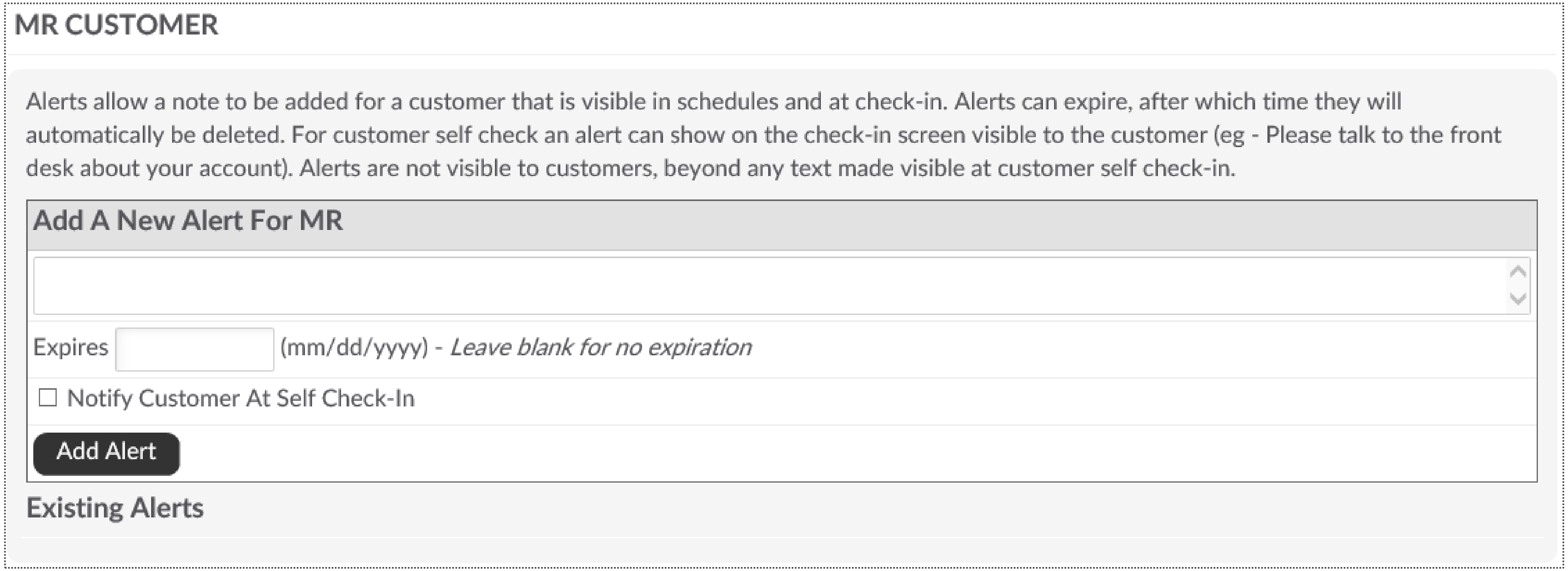
Add a Member Alert

Member Account > All Detail > General > 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.

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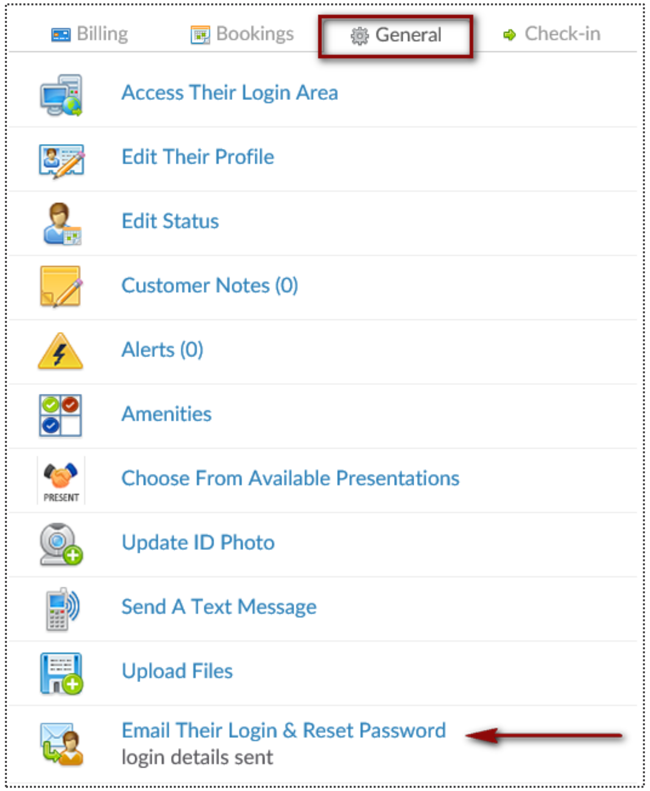
Email Login & Reset Password

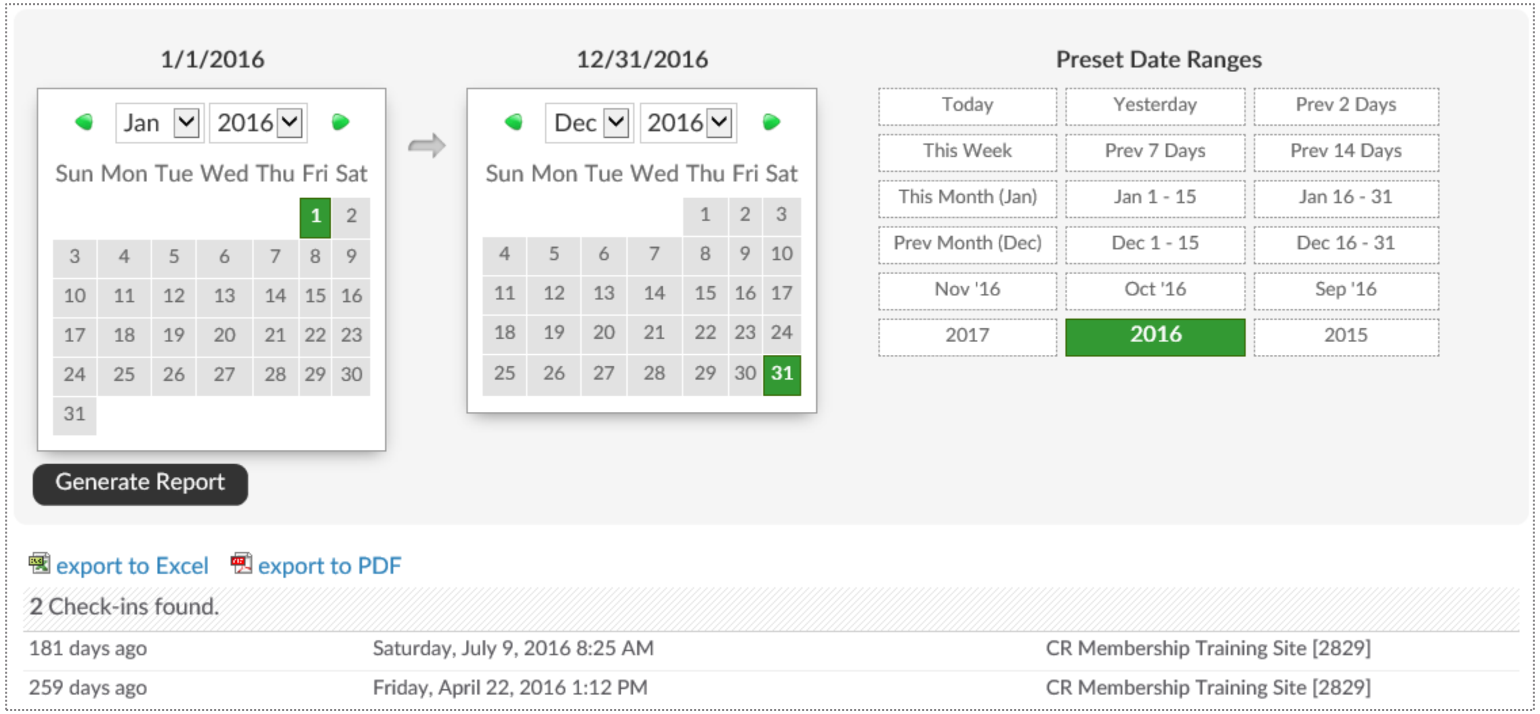
To access this screen click search and select the desired client. Verify the client has an email address, if not click the edit pencil to enter one. Click the **All Detail** button.



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

View Check – In History

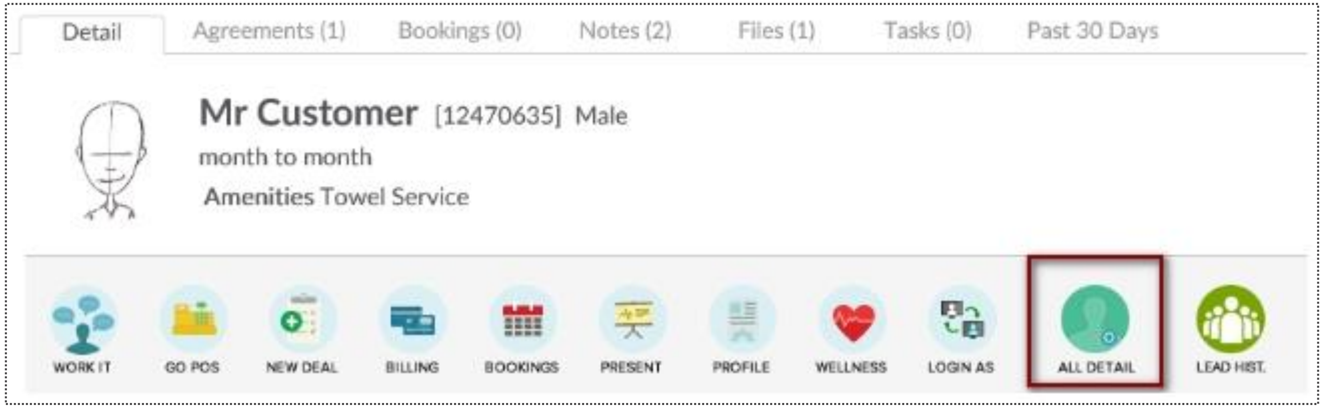
Member Account > All Detail > Check In > View Check In History



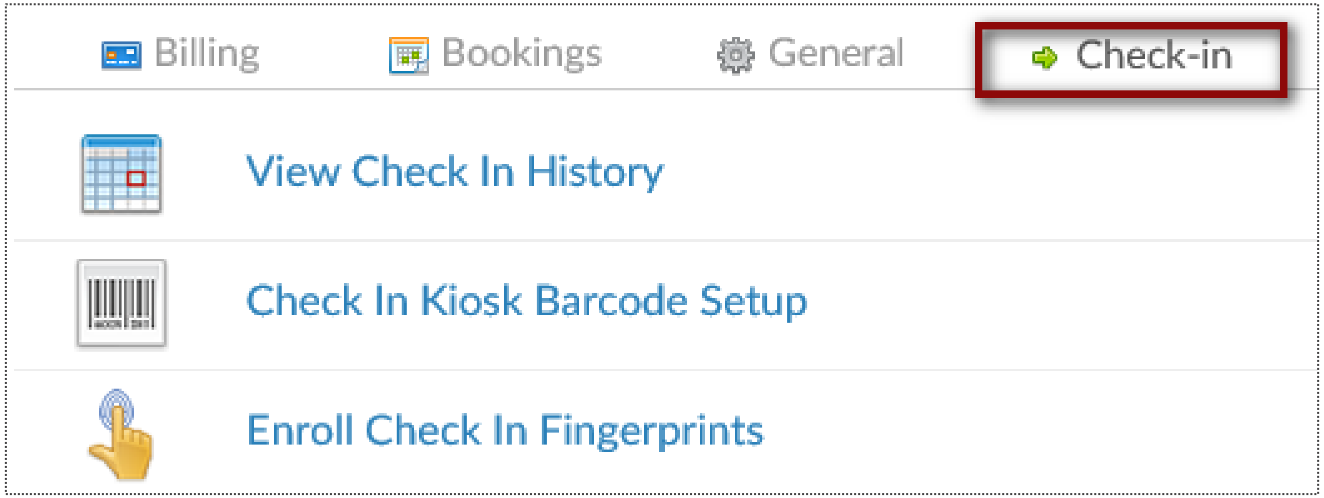
To generate this report, select the date range and click to **Generate Report.** The results will display on screen and show the number of check-ins, date of the check-ins, and the club location of the check-ins.

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.

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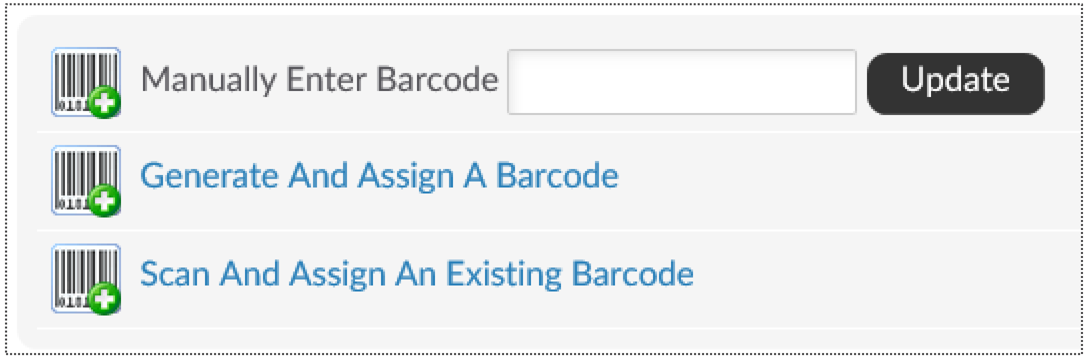
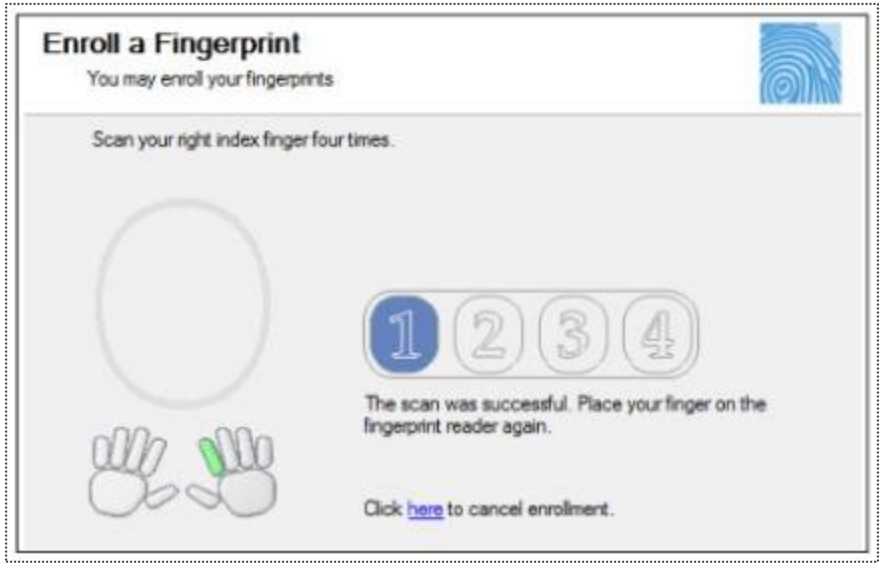
Update Barcode/Fingerprint





Manually Enter Barcode - type in the barcode number
Generate And Assign a Barcode - Have ClubReady assign a barcode number
Scan And Assign An Existing Barcode - If you have a ClubReady approved keytag scanner (not orbital) you can scan the barcode after clicking this option

Click on a digit to advance to the next step in the fingerprint enrollment process

The finger selected will highlight in green below the scan window.

Each time you scan the finger you will see the fingerprint show up in the oval window and the number will advance from none to 4. Scan the finger 4 times.

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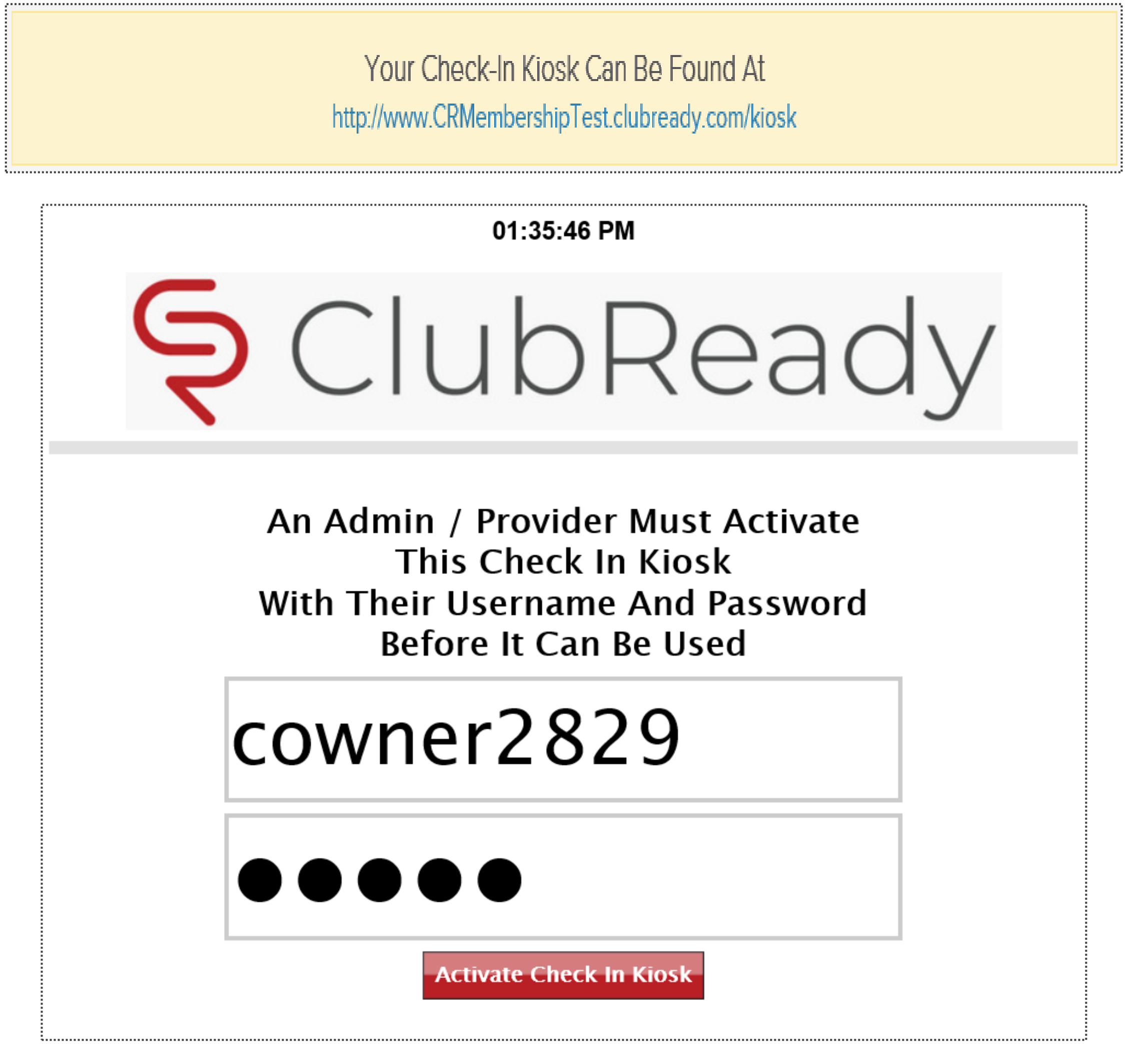
Check In Web Kiosk

Setup > General > Check In Web 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)

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

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.

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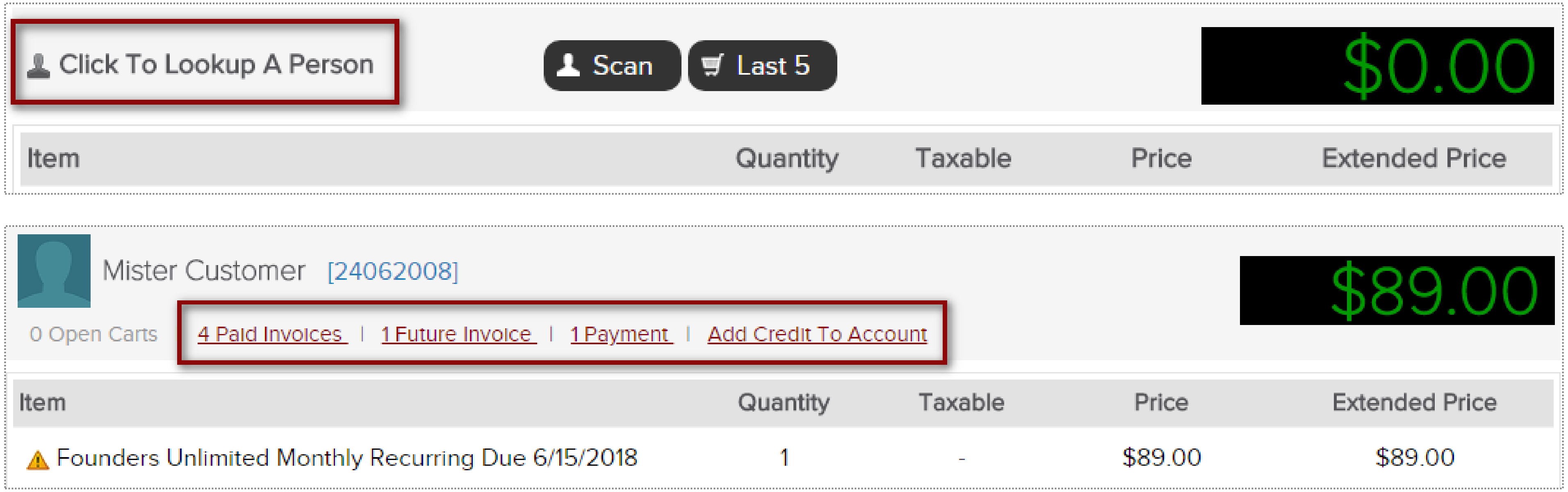
POS & Inventory

Point Of Sale

Main > POS

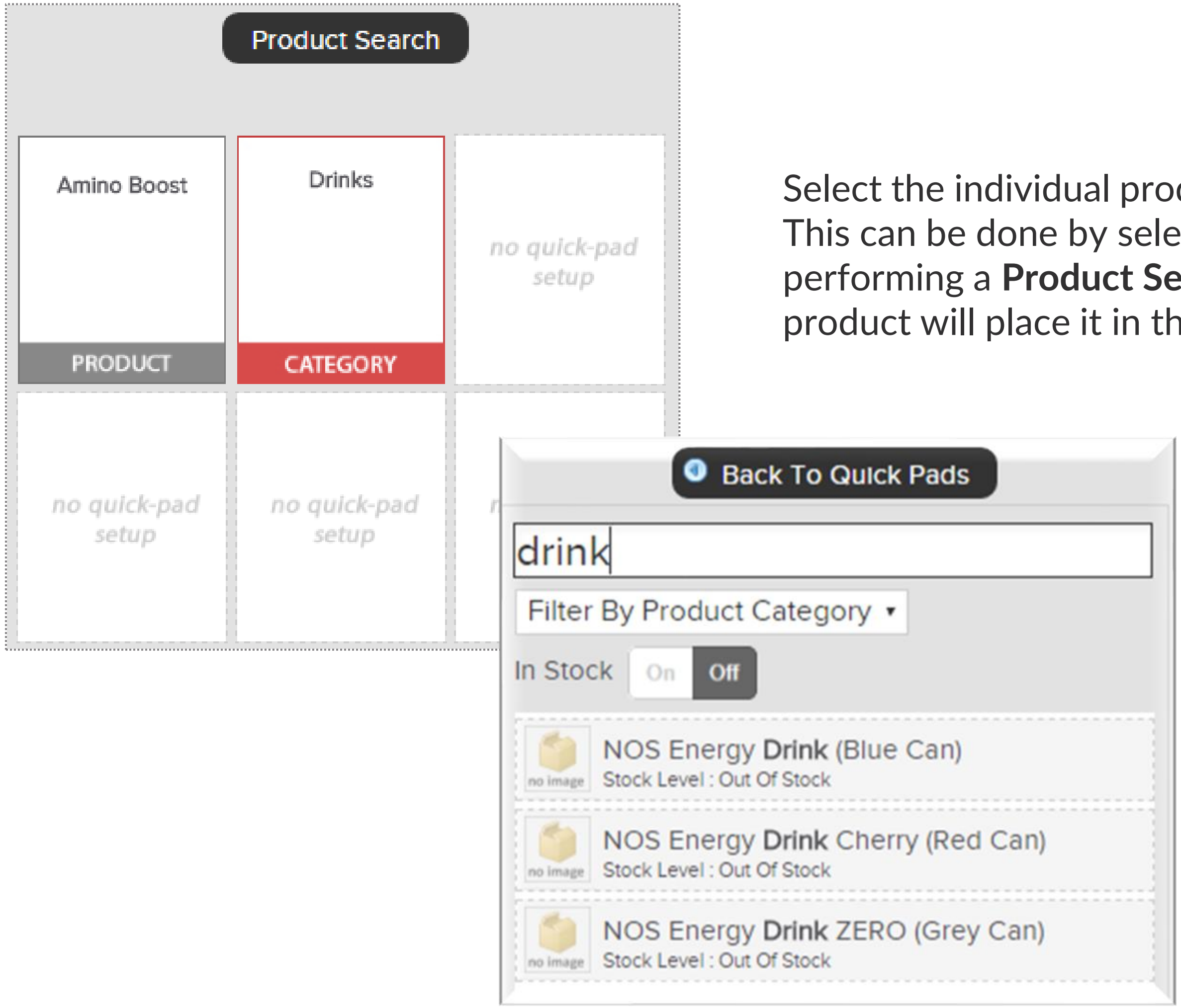


The POS is used for taking payment on past due and future invoices as well as for selling merchandise. To pull a client into the POS, select the **Click to Lookup a Person** button.

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.

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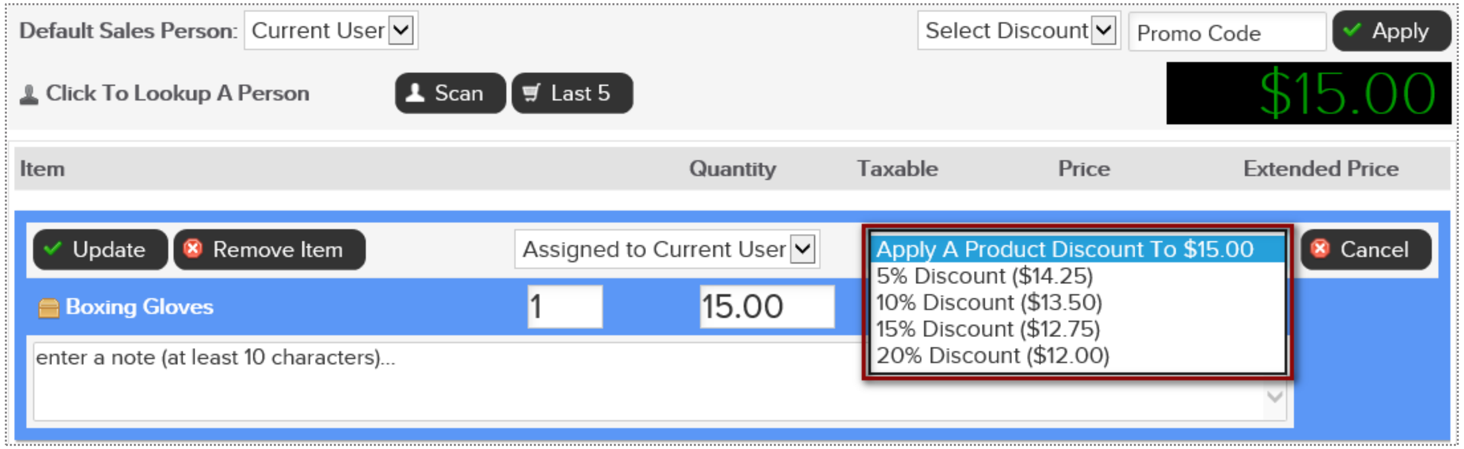
Editing an Checking Out

Once an item appears in the shopping cart, click on the item to make any adjustments that may be needed. When ready, select Checkout.

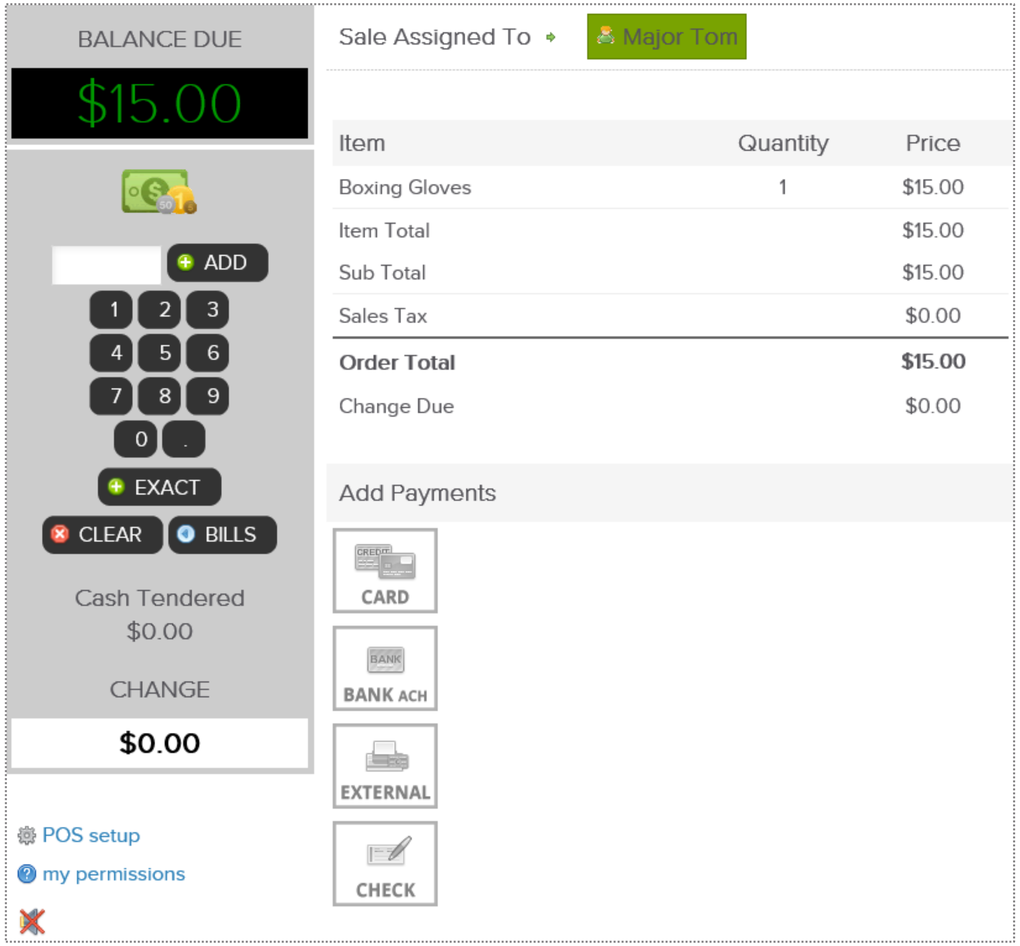


Adjustments may include; modifying the quantity, price, applying a discount or removing the product from the shopping cart.

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

Finalizing the Purchase

Select the appropriate payment method.



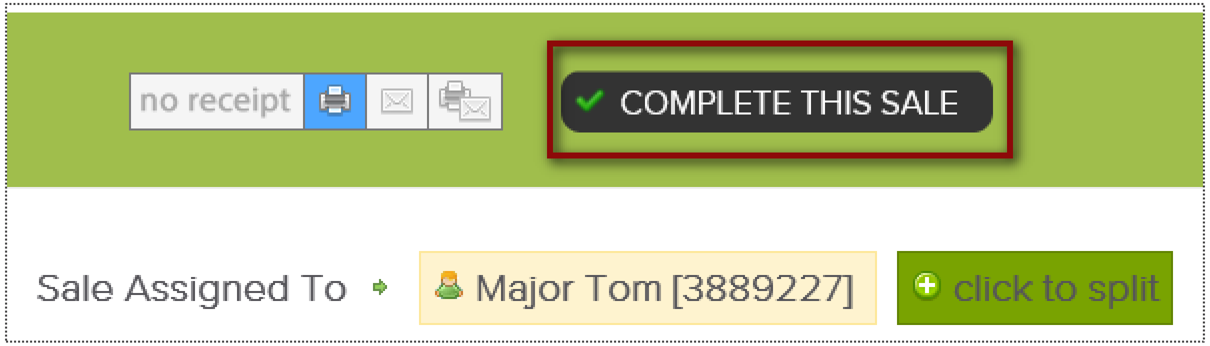
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

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

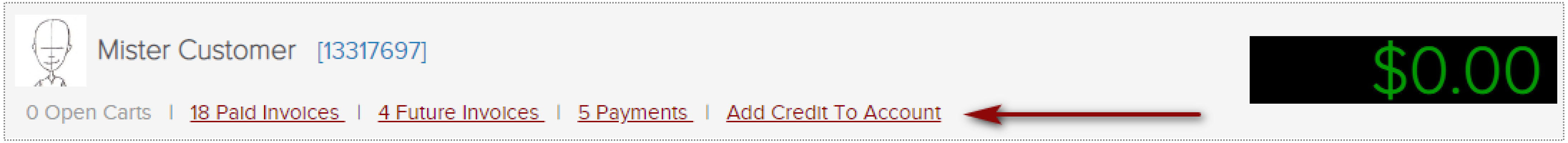
It is now time to complete the sale by processing payment.

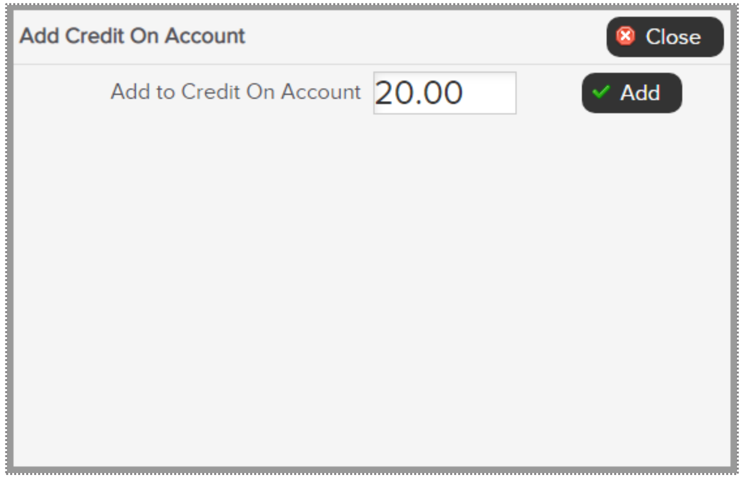


At **CHECKOUT** select the payment method and who will get credit for the sale by clicking on the staff name. Next, click **COMPLETE THIS SALE** to finalize purchase.

Point of Sale: Adding Credit on Account

Main > POS





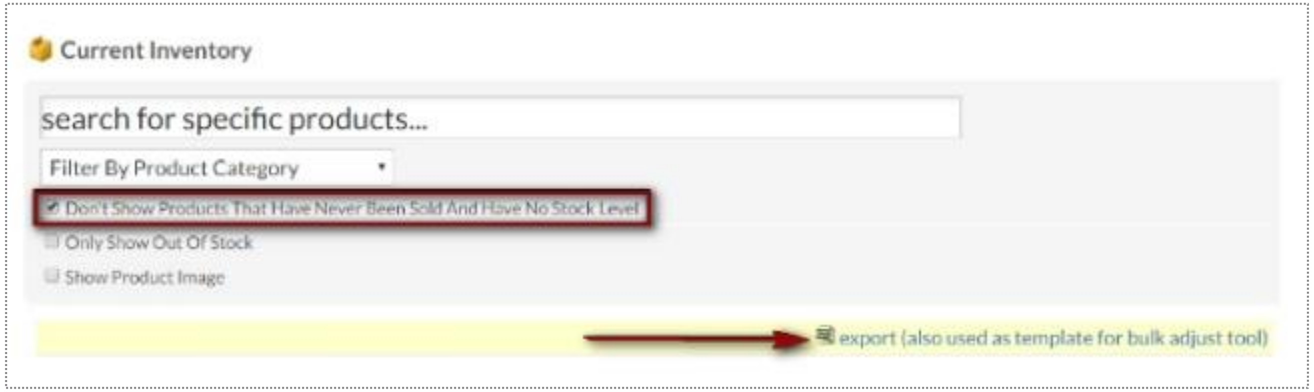
The POS also allows for staff to apply a gift card to a member's account. First, select the customer receive the gift card. Click **Add Credit To Account**. Type the amount that is being applied.

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.

Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory



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

Navigate to **Reports > Products > Inventory.** Use the drop down box to **Filter By Product Category** and use checkbox options if needed.
To create an Excel export with all products listed then leave the drop down menu blank and uncheck **Don't Show Products That Have Never Been Sold And Have No Stock Level.**
Click on the Excel **export (also used as template for bulk adjust tool)** link.

Bulk Upload Inventory

Tools > Products > Bulk Upload Inventory

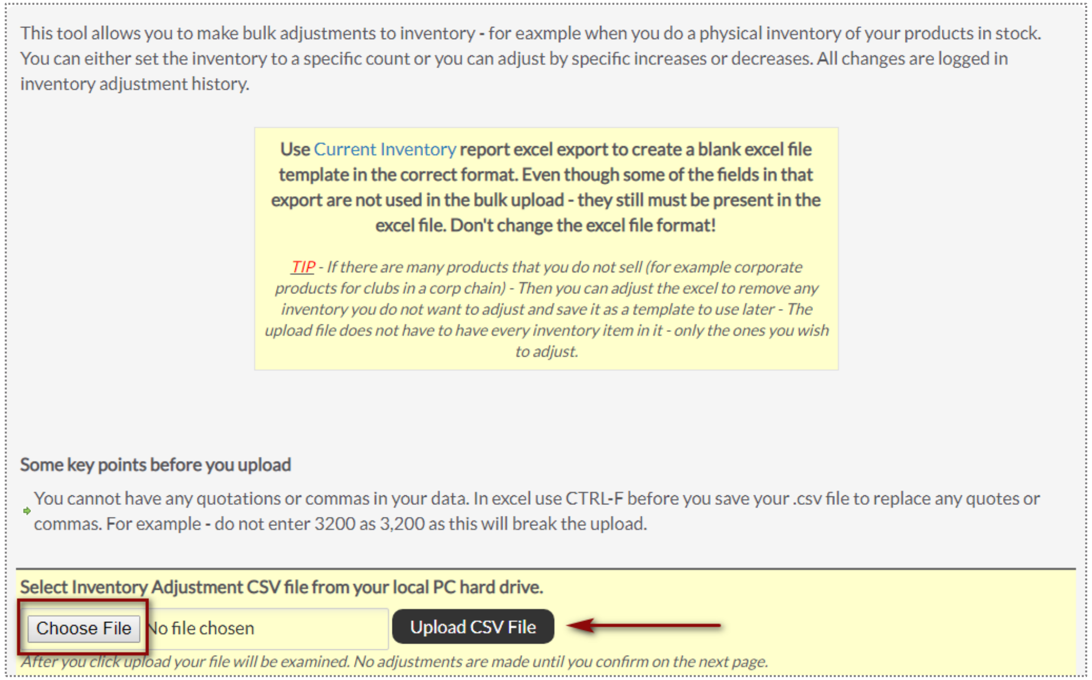
	A	B	C	D	E	F	G	H	I
1	**CR Membership Training Site - Filtered Product Inventory Listing : 5/24/2016**								
2	***This file can be used for bulk inventory adjustments - format must remain the same. After adding adjustment entries in green columns save as .csv file***								
3	**ProductID**	**ProductCode**	**OtherProductCod**	**ProductName**	**CurrentInventor**	**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



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.**

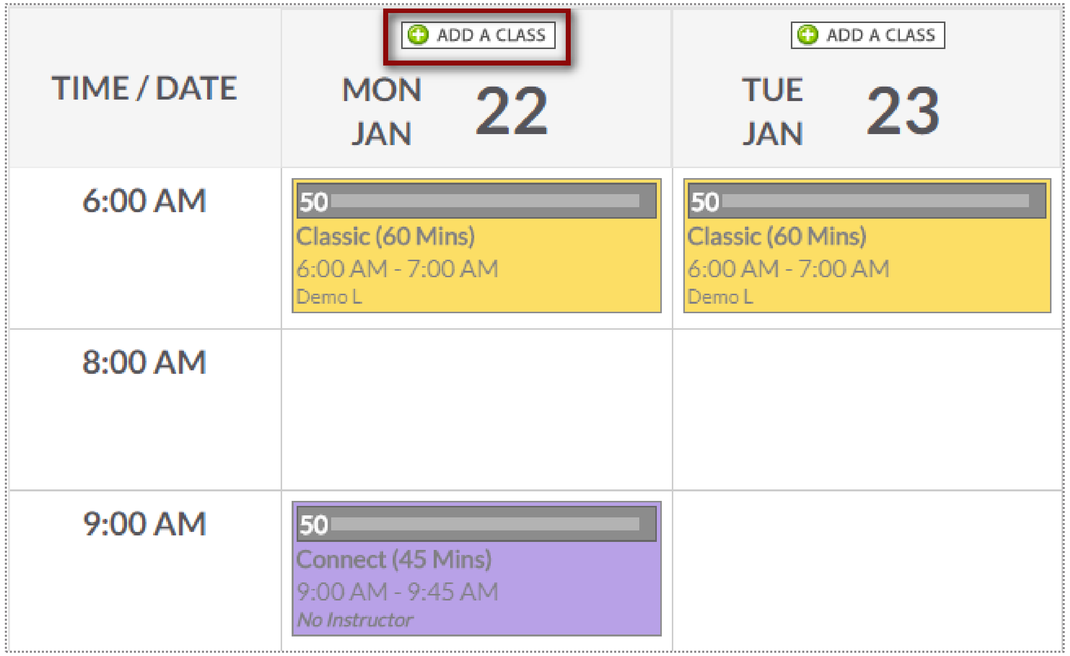
All adjustments will appear on screen and the inventory has now been changed. These changes are logged and can be found in **Reports > Products > Inventory Change Log.**

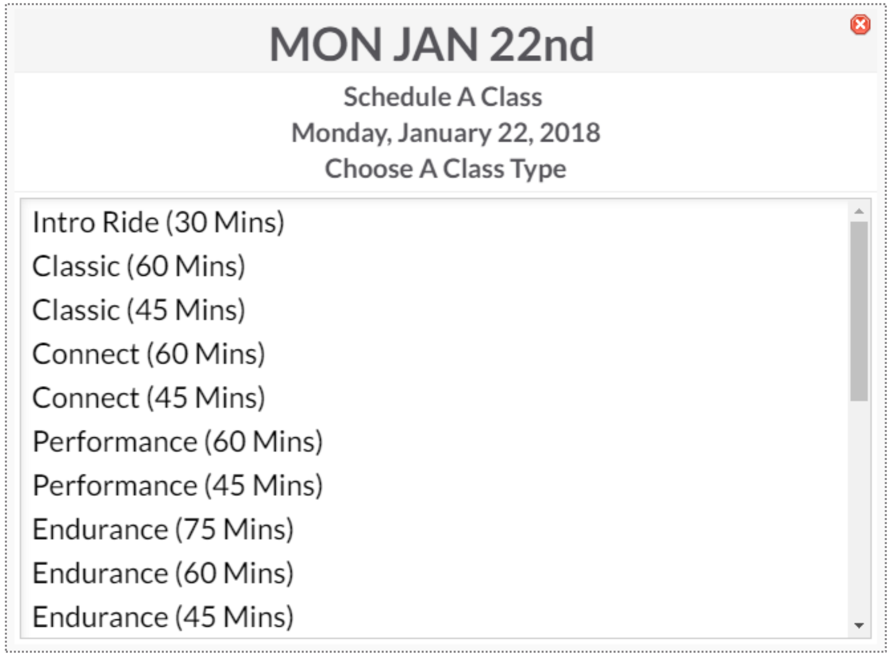
ClubReady

Schedule Management

Classes: Add a Class to the Schedule

Bookings > Classes





Locate and select the day you want to add the class on the schedule. Click **ADD A CLASS.**

Now **Choose A Class Type** for the date selected.

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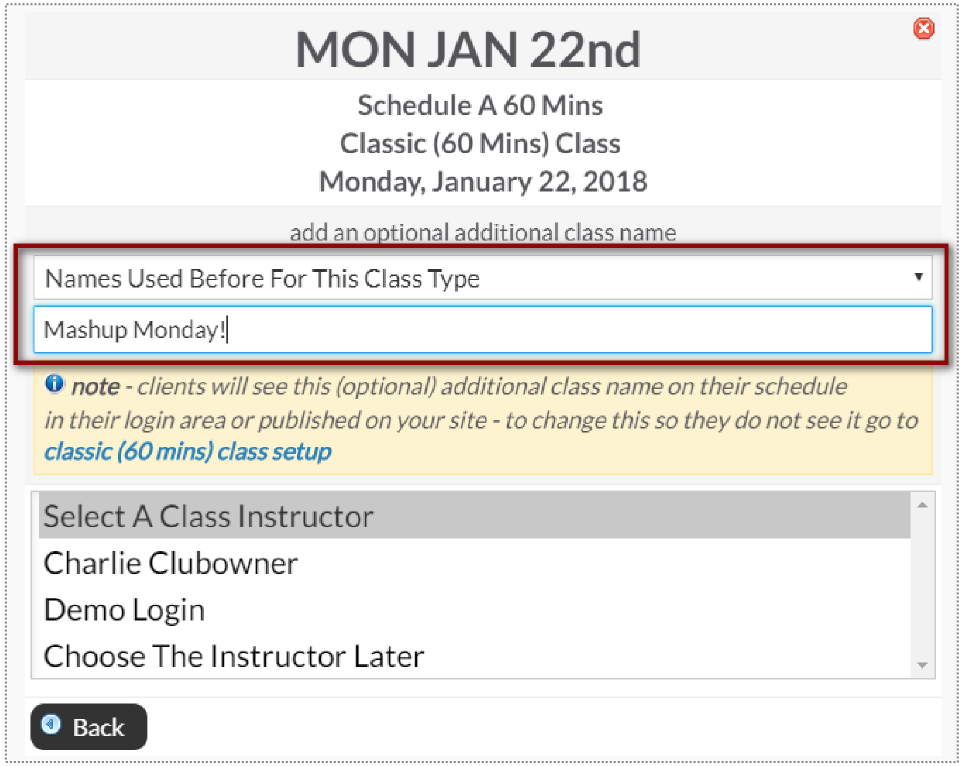
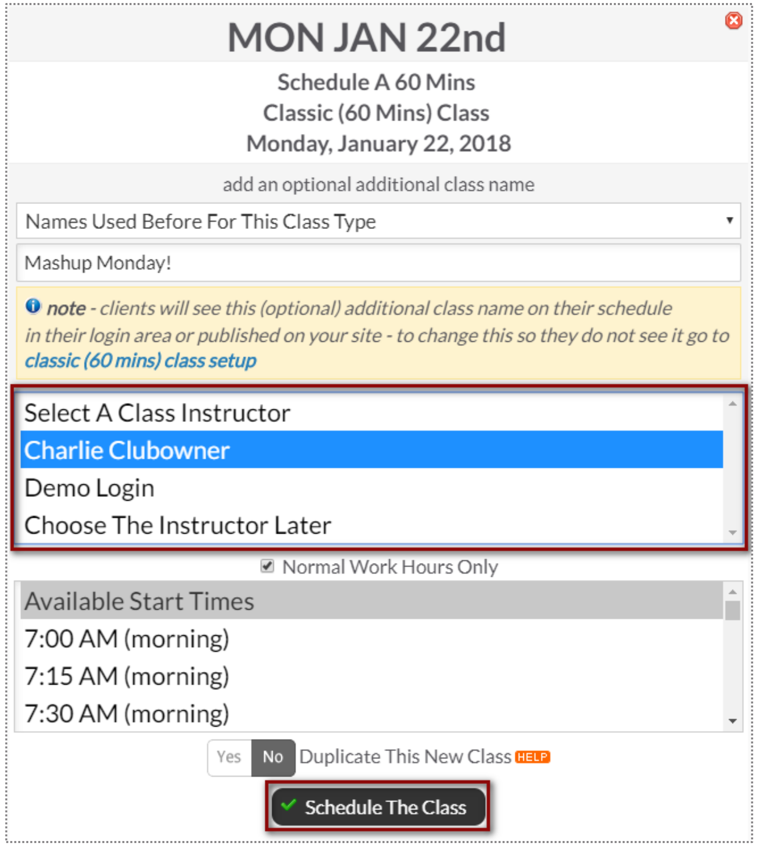
Classes: Add a Class to the Schedule

Bookings > Classes





Type or select if you want to use a secondary name for the class for members to view when they book into 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 sche

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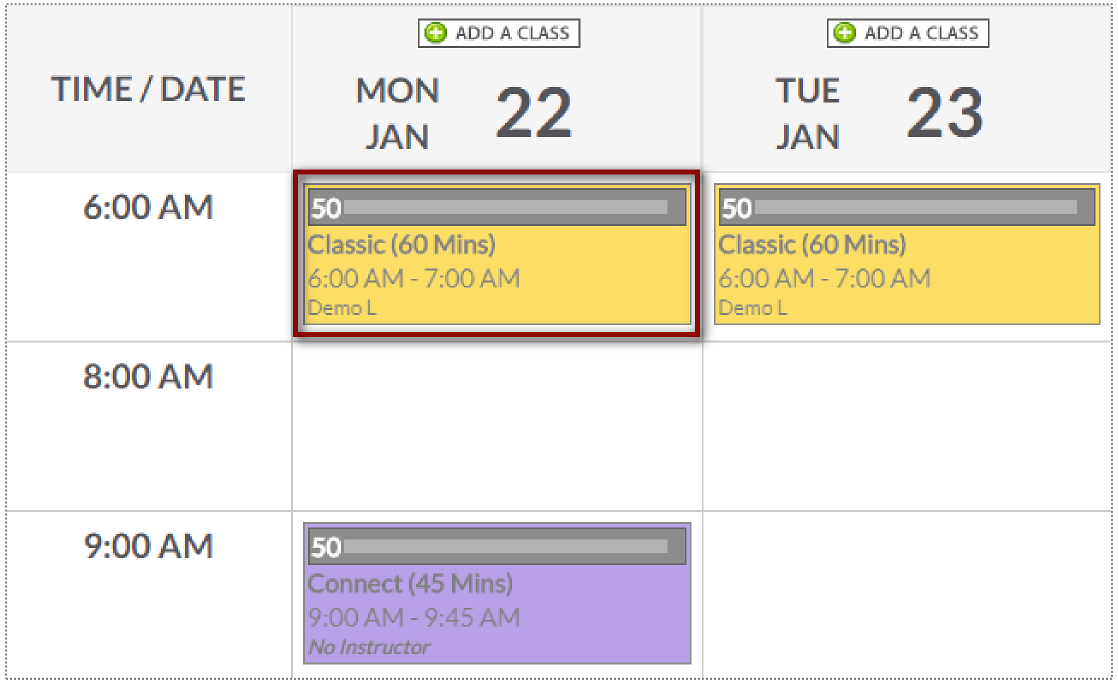
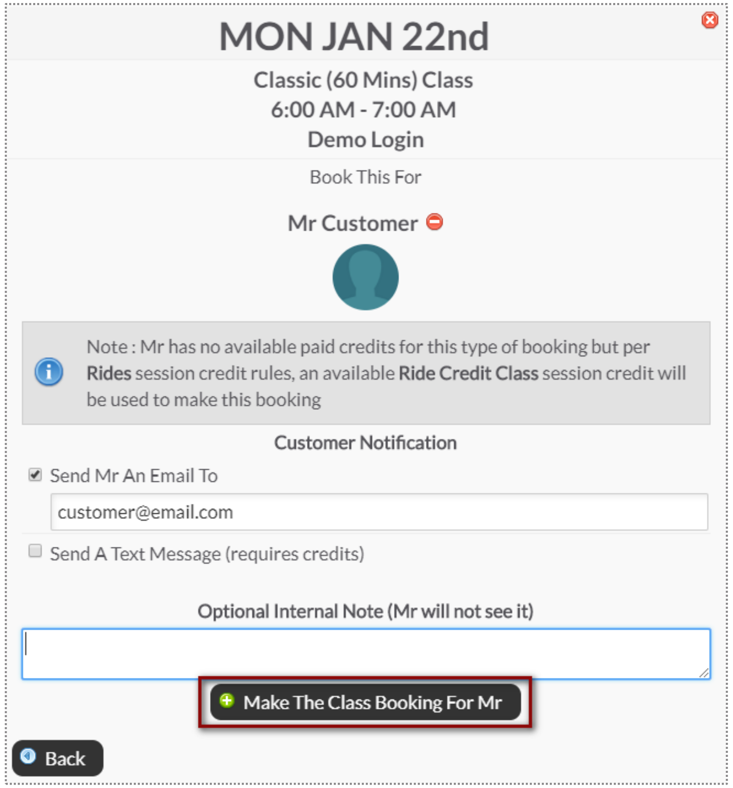
Classes: Schedule a Class Booking

Bookings > Classes





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

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.

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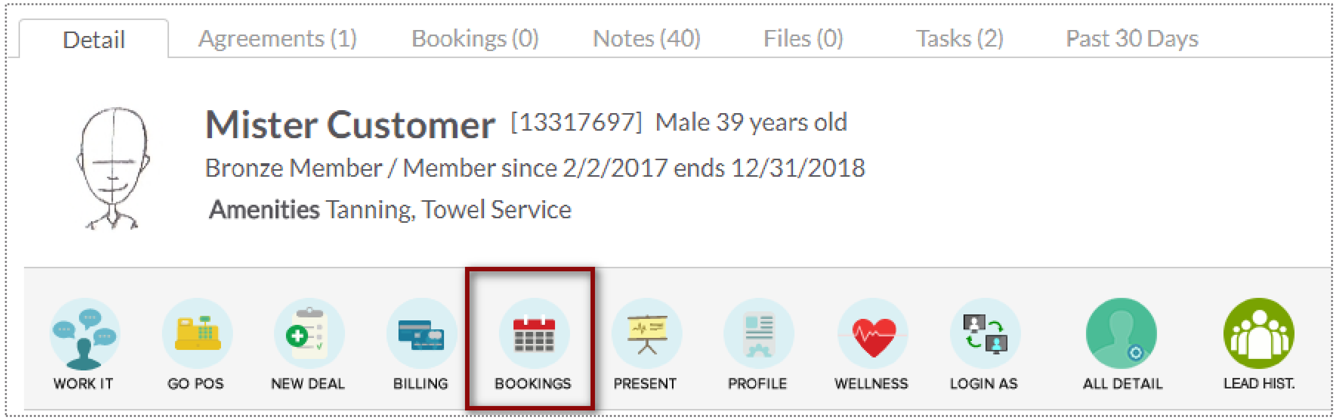
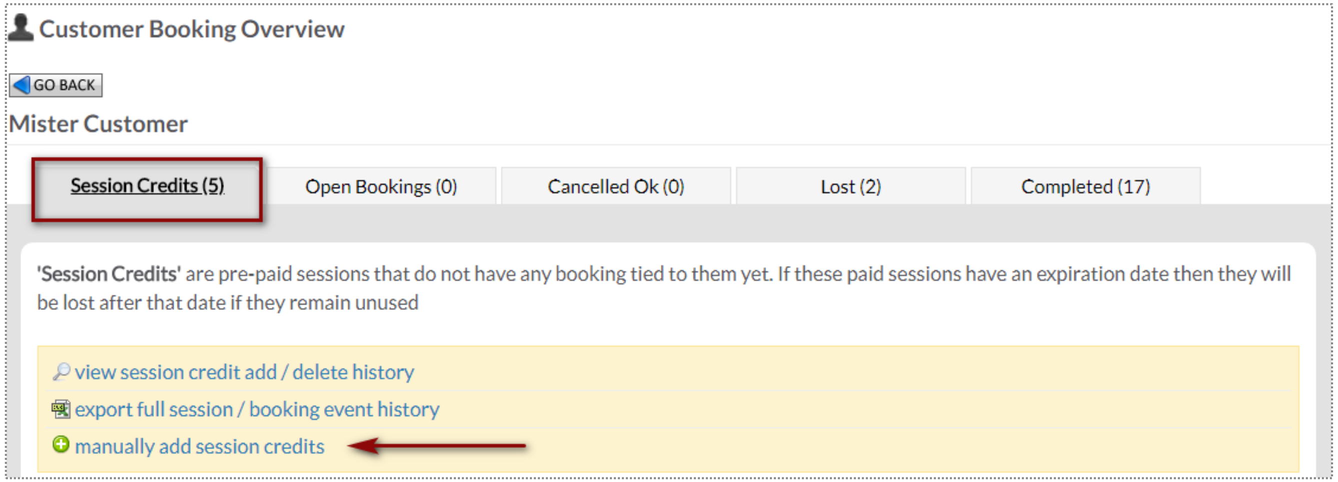
Classes: Adding Credits to Account

Member Account > Bookings



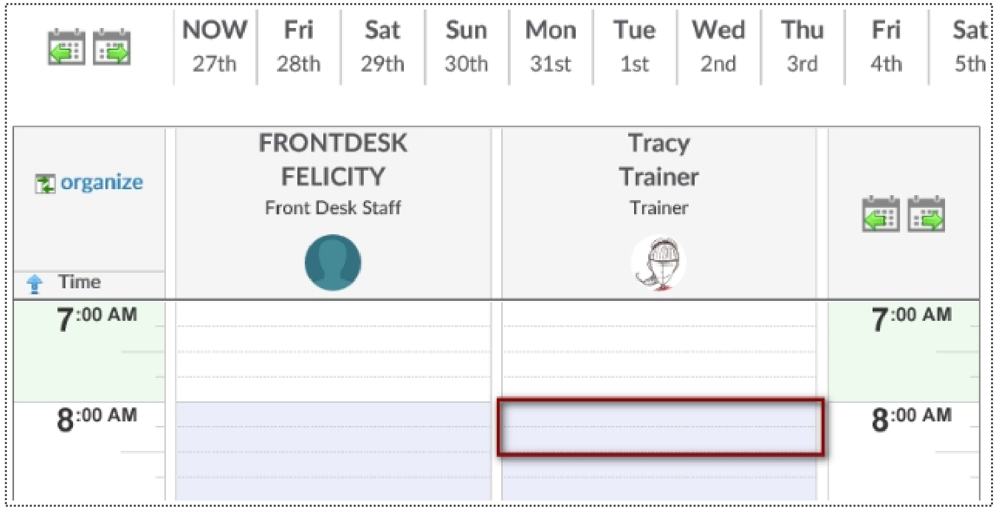
To access this screen search and select the desired client.

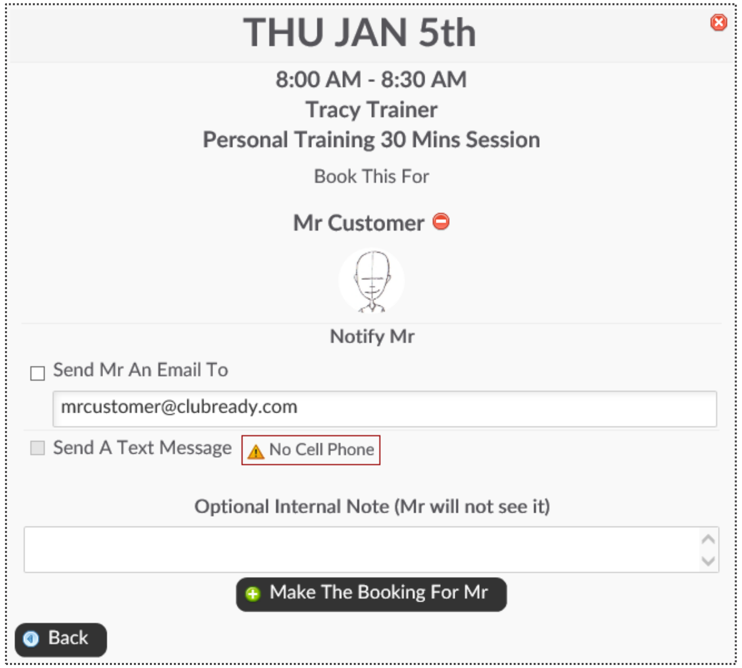


To start manually adding sessions click **manually add session credits.** Choose the **quantity, session credit type** and **session expiration date.**

Grid View: Schedule a Service

Bookings > Grid View





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

Click the **Add New Booking** button. Select the desired service and use the search box to search for your client. **Send An Email To or Send A Text Message** to notify your client of their booking.
Select **Make The Booking** to complete.
Note: Only staff with adequate permissions may book a member into a service without credits.

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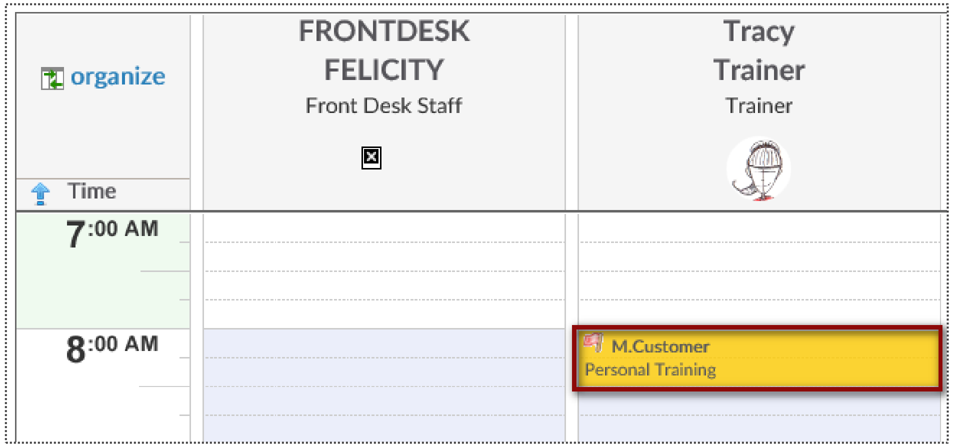
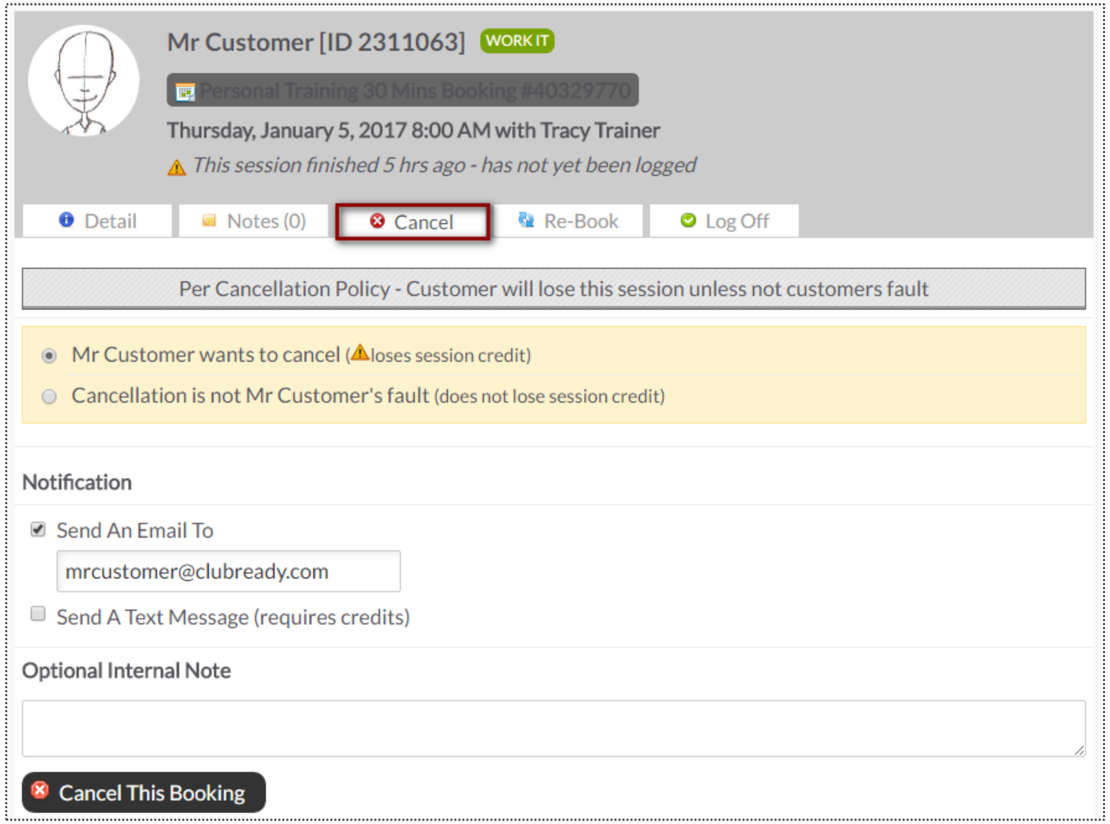
Grid View: Cancel a Booking

Bookings > Grid View



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



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

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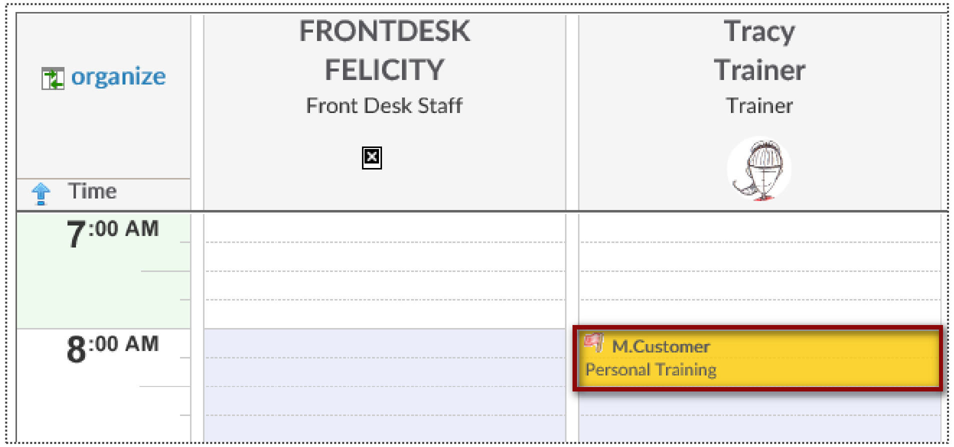
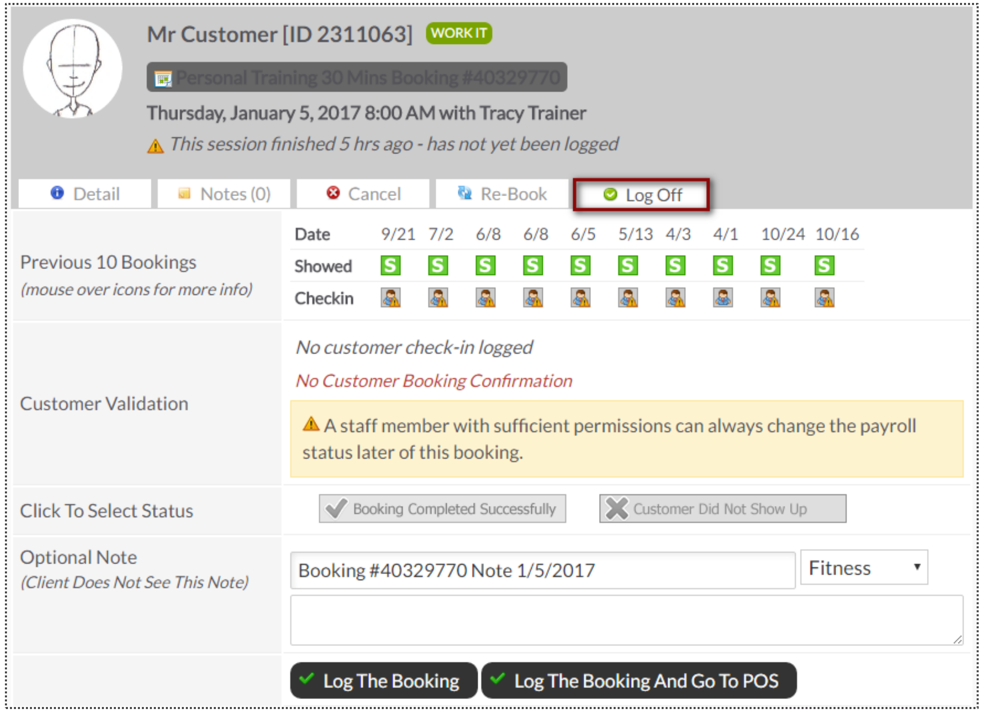
Grid View: Manually Log a Session

Bookings > Grid View





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

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.

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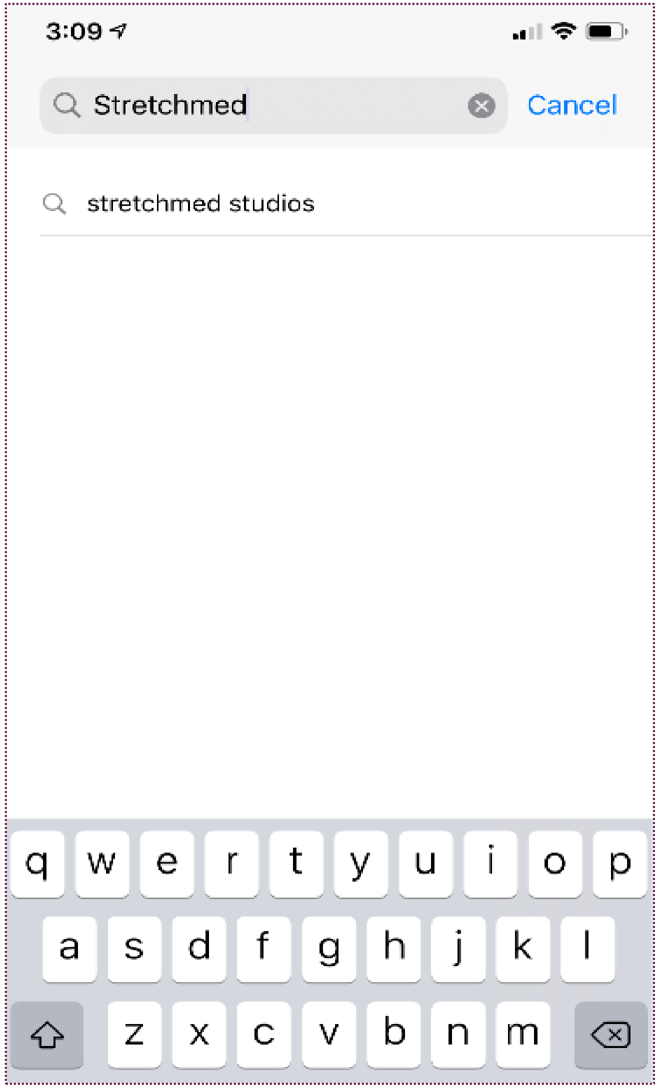
ClubReady

Mobile App

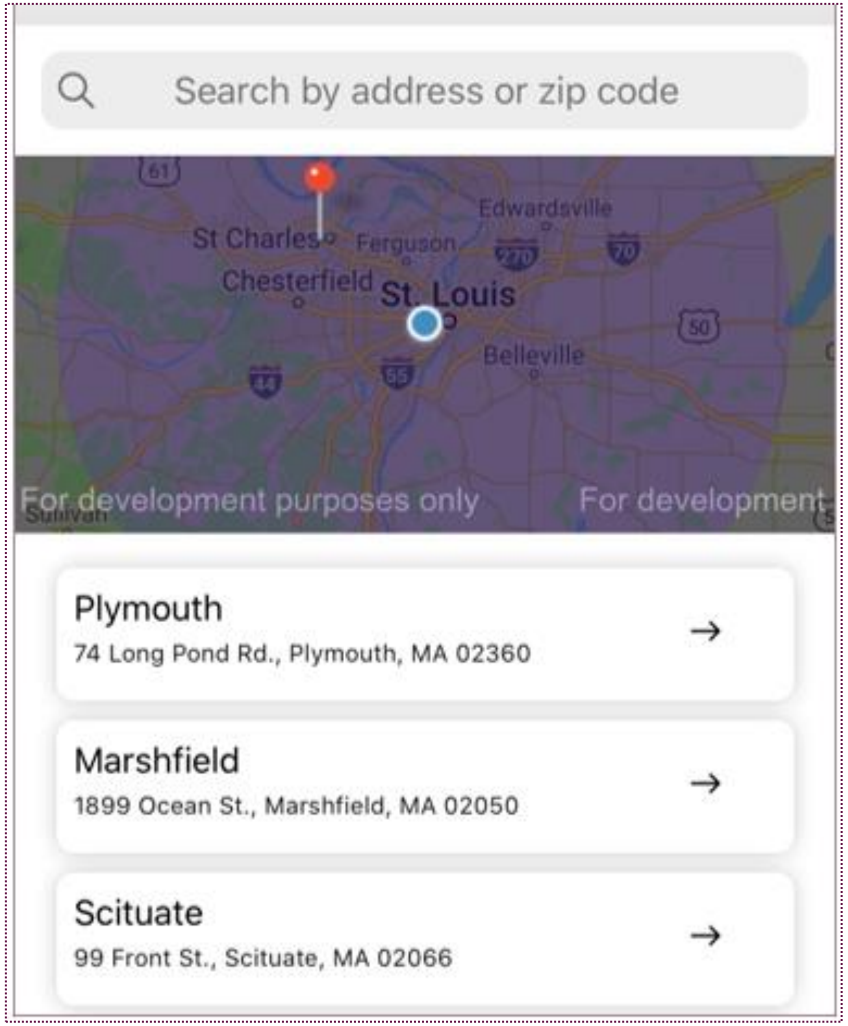
Searching and Downloading



The user will navigate to the App Store and search **"Get In Shape For Women"**.

Once downloaded, the user will open the app.

Locations Page



The user can search nearby locations by entering an address or zip code.

The user can also select one of locations listed below the map to then login.

The user can bypass this locations page by click the 'Login' icon located in the bottom right-hand corner of the screen.

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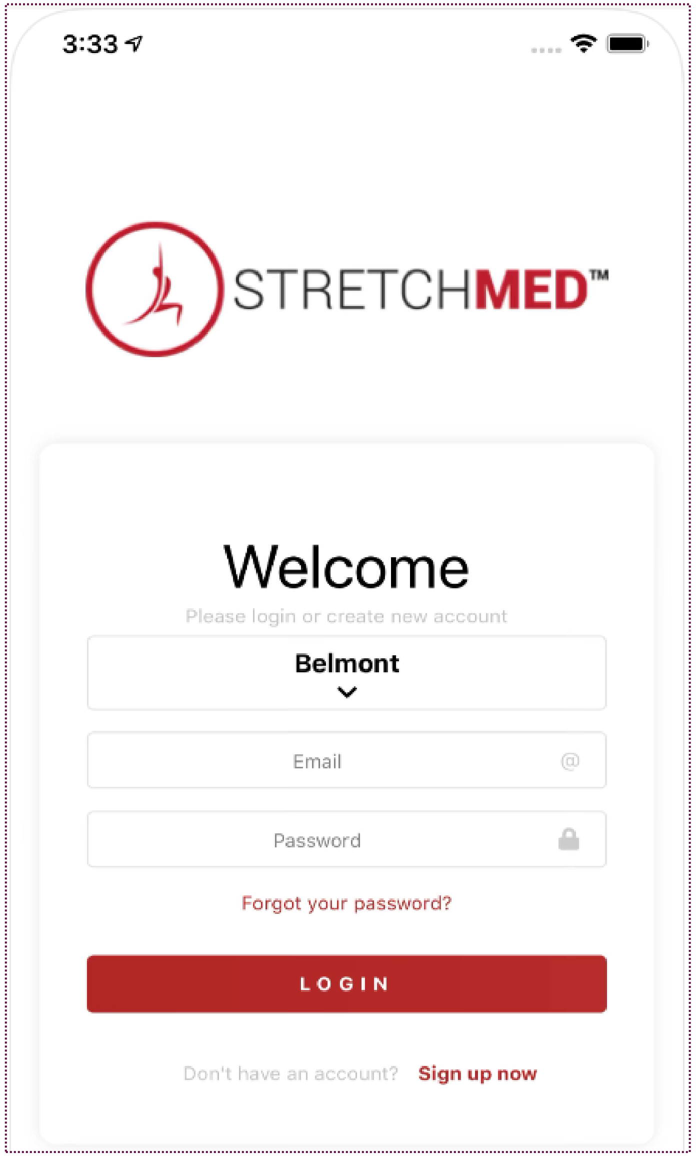
New User Sign Up



If it is a new user, they can click the **'Sign Up Now'** link to create a new account. This account will be created in ClubReady as well.

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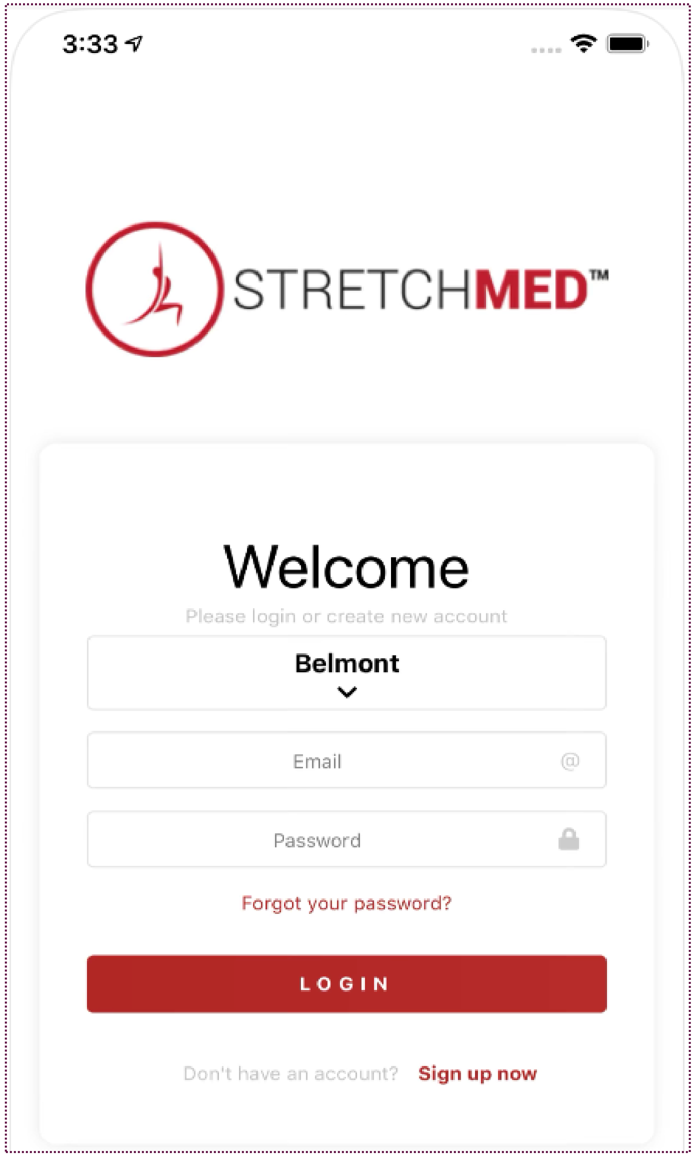
Login Page



If it is a returning user, the login page can be used to quickly log in.

The user will select their home location, enter the email on their ClubReady account, and use the password from their ClubReady account.

NOTE: The user will not use their ClubReady username.

If the user does not know their password, the user can reset by using the 'Forgot Your Password?' link.

The studio can also reset the user's password in ClubReady under their profile.

Edit A Customer Profile (where to reset the user's password): https://www.clubready.com/wiki/WK26067540987

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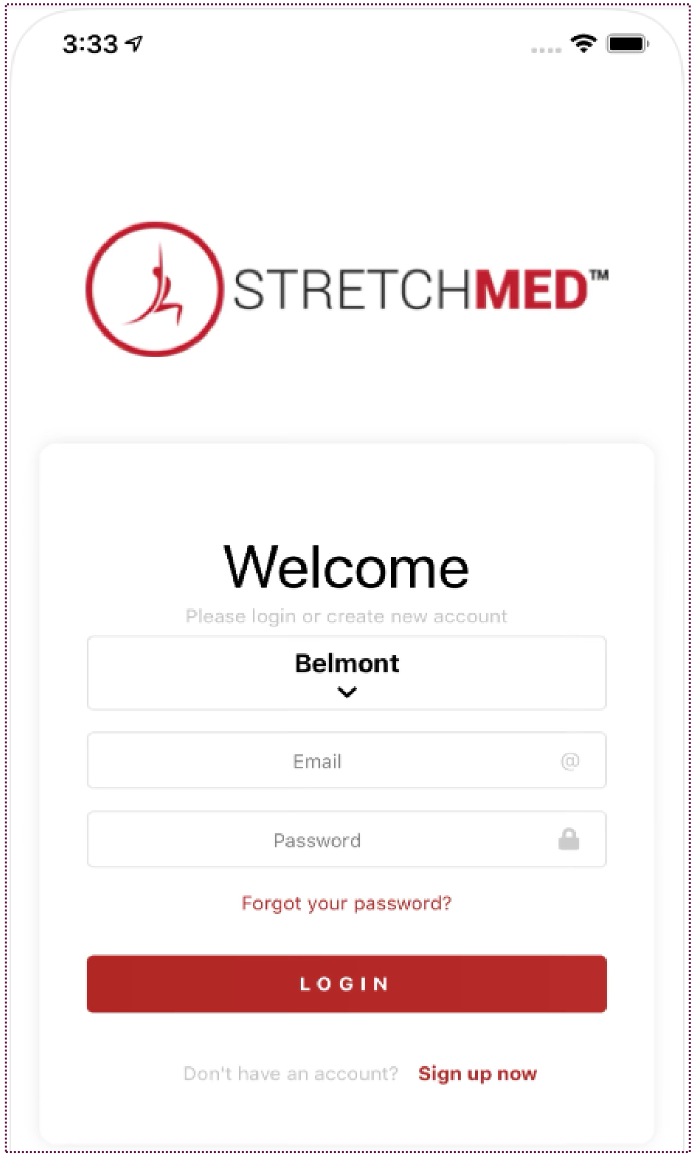
Login Troubleshooting



Confirm the user has selected their home location (user may have accounts with the same email at other CKO locations).

Confirm user has entered correct email and password.

Check to see if user's same email is being used for another account(s) in your ClubReady site. If so, delete these extra accounts or merge them into the true account. Then, reset the user's password in ClubReady and give to the user to login.

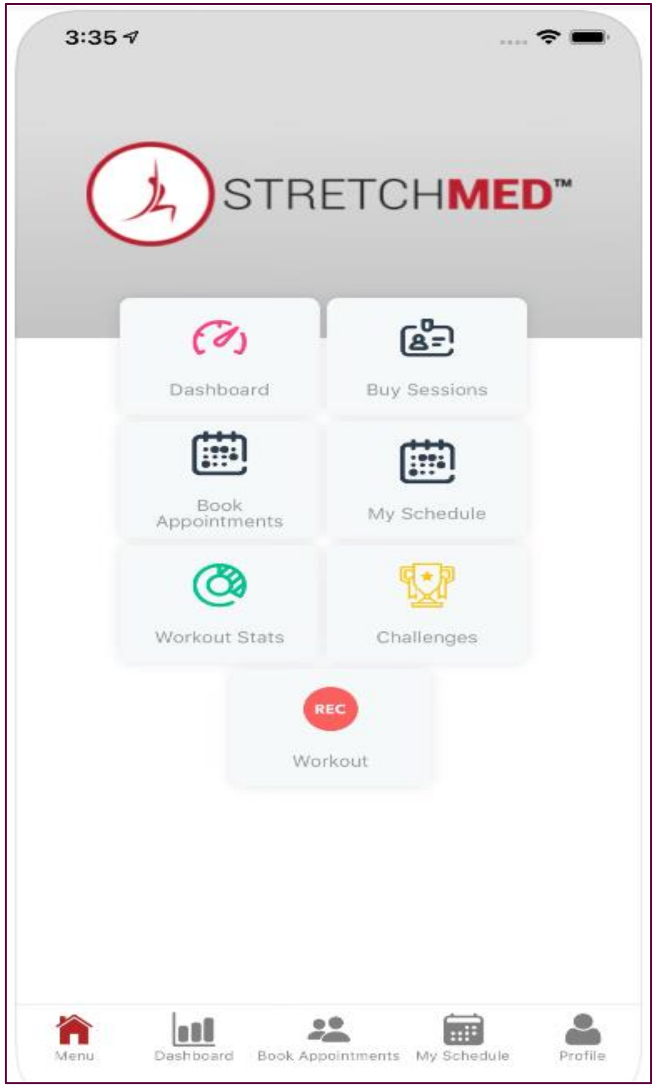
Helpful Tip: If user is having trouble logging in to the app, gain permission from the user to reset their password and attempt to login yourself.

Edit A Customer Profile (where to reset the user's password): https://www.clubready.com/wiki/WK26067540987

Merge A Duplicate Profile: https://www.clubready.com/wiki/WK19128952393

Delete A Member / Customer / Prospect: https://www.clubready.com/wiki/WK18327804136

Menu Screen



- Dashboard
- Buy Classes
- Workout Stats
- Book Classes
- Bookings
- Challenges
- New Workout

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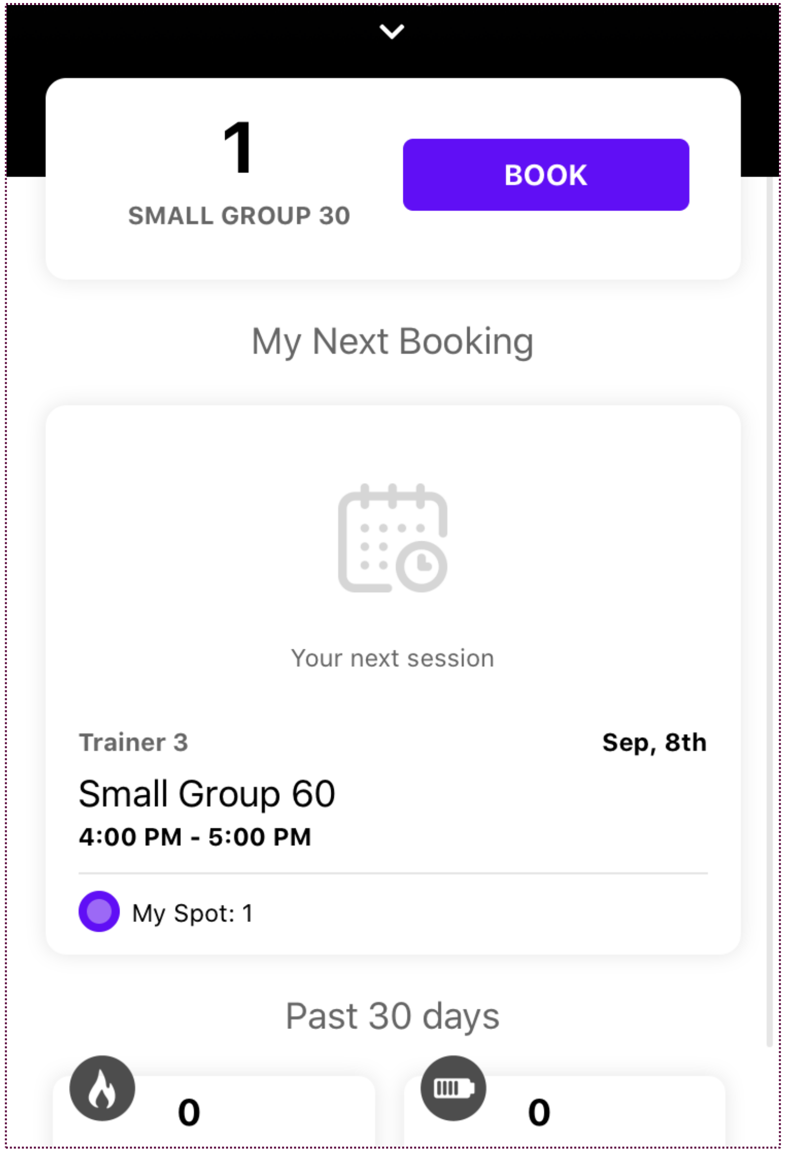
Dashboard

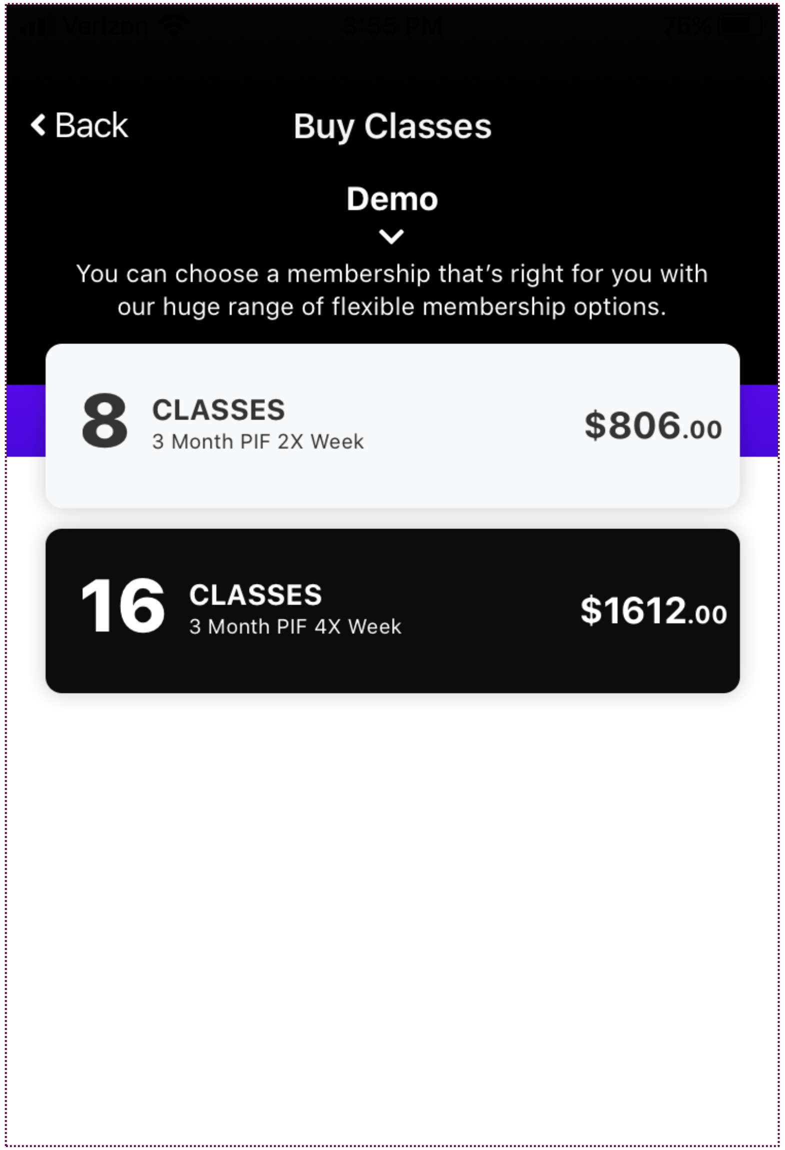


Number of Class Credits Remaining

Upcoming Bookings

Workout Stats

Buy Classes



Memberships that have been enabled to be sold through the app will be available for purchase by the user.

Enabling Sales Packages In P I Q / Custom Branded App:
https://www.clubready.com/wiki/WK39908408736

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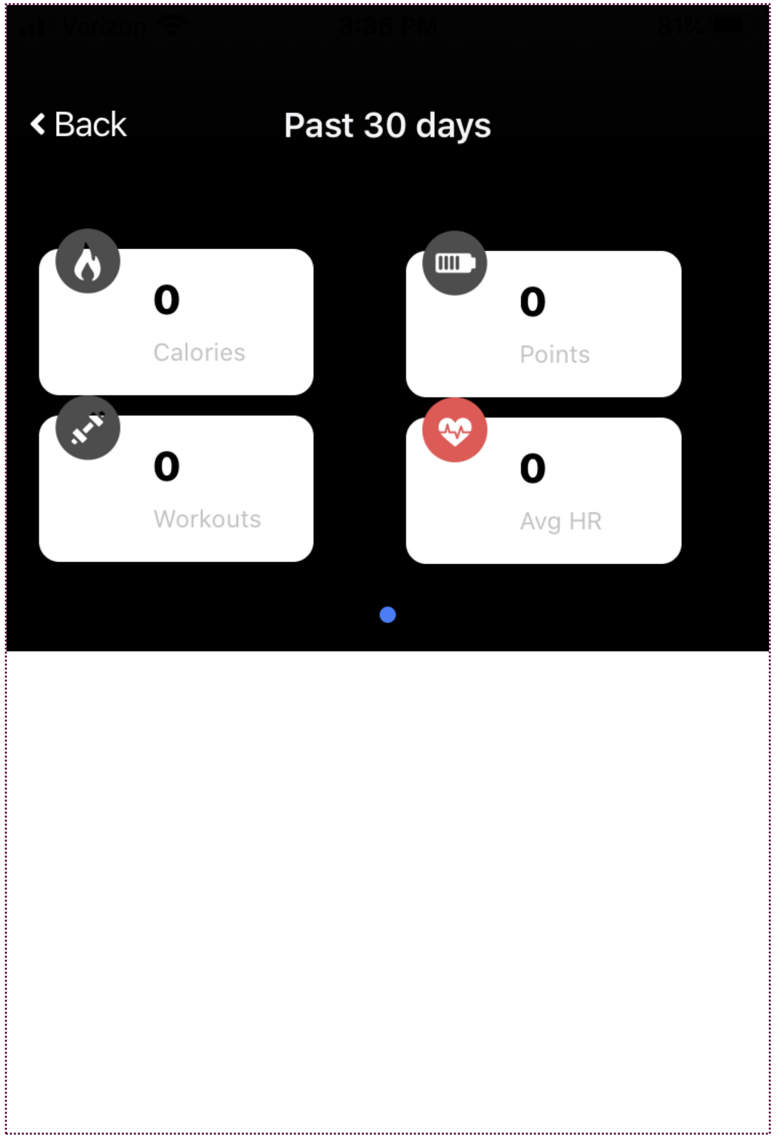
Workout Stats



Stats compiled from data tracking setup by the studio (a PerformanceIQ system)

If user has a Bluetooth-enabled HRM/Apple watch, it can be connected to their phone and track stats for classes and/or at home.

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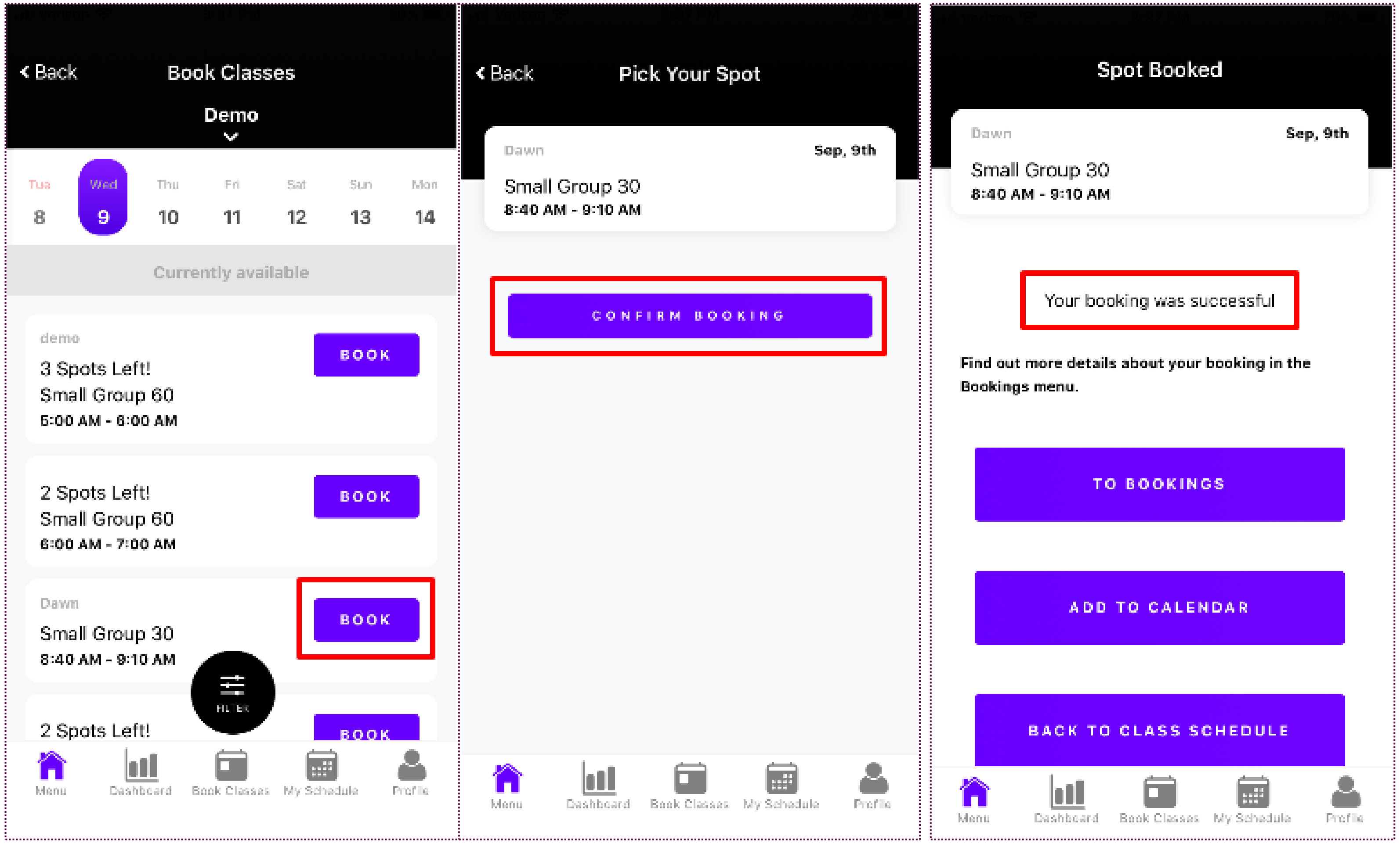
New Workout

User will connect their HRM to phone via Bluetooth and start a new workout.

Book Classes



View home location's schedule to book classes.

Click '**Book**' to begin the booking process.

User will be asked to confirm the booking.

Once confirmed, the user will receive a successful message.

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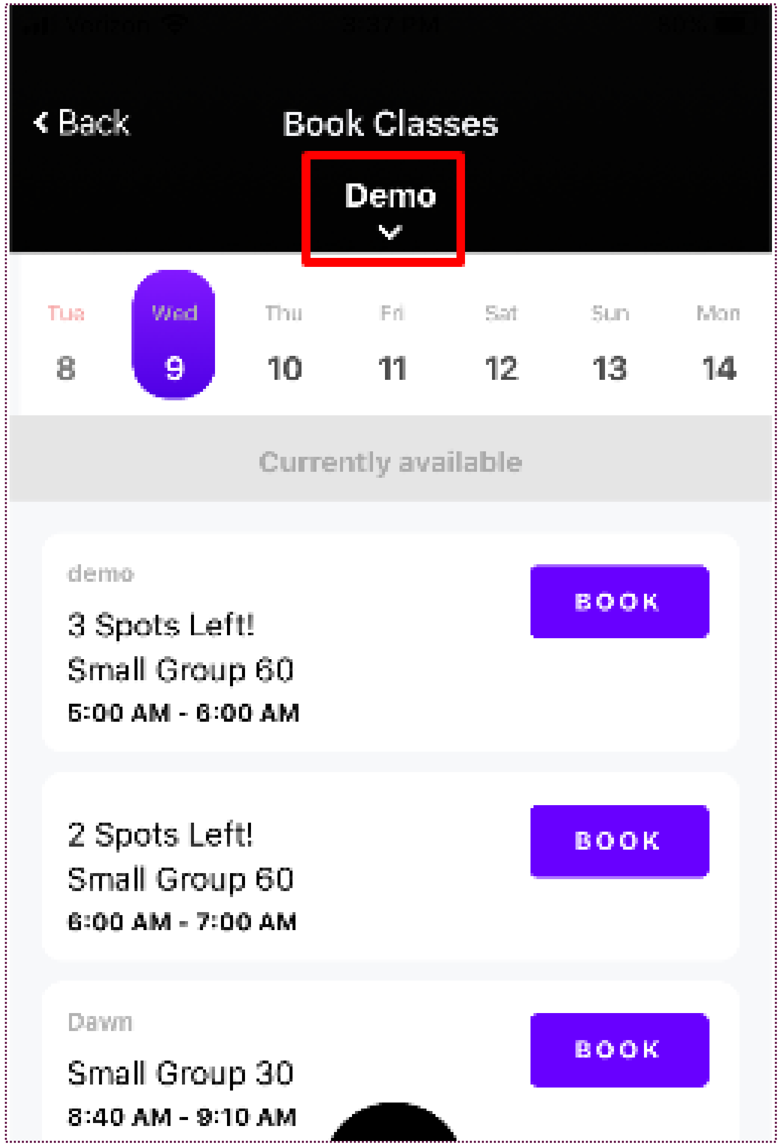
Cross-Club Book

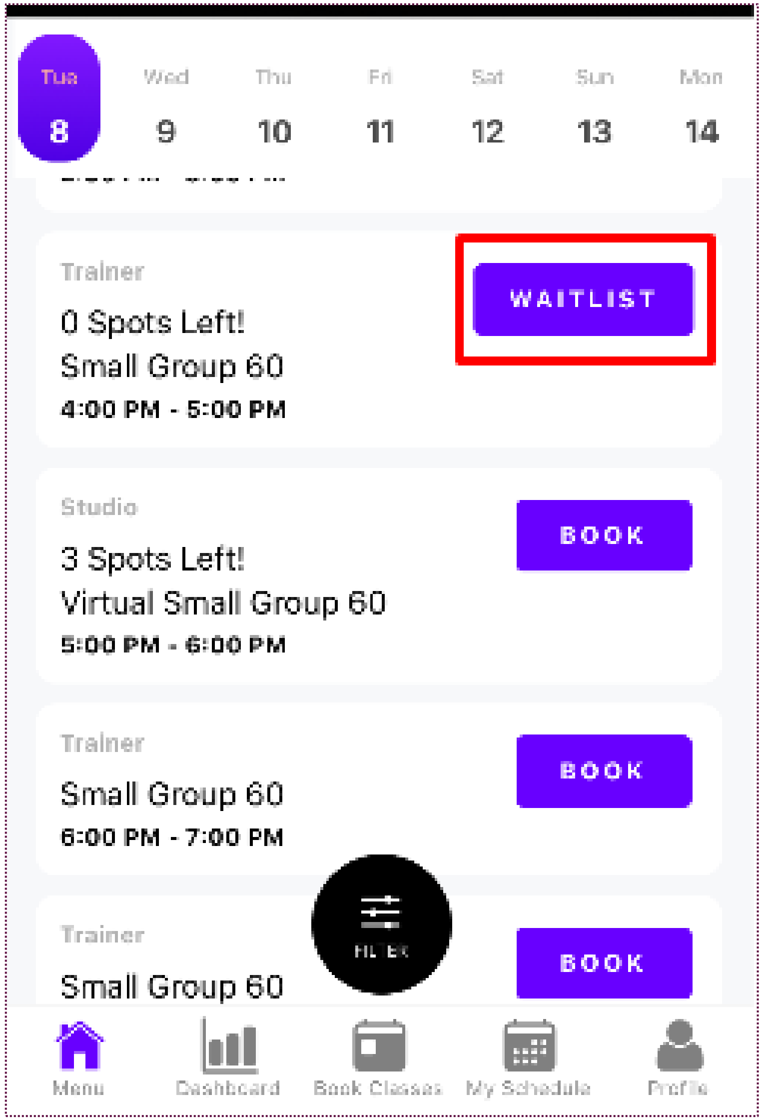


If cross-club bookings have been set up between multiple clubs, the user can navigate to the other location(s) class schedule to book a class.

Click the drop-down arrow at the top to change the location's class schedule.

Cross-club booking between locations will need to be set up at the Corporate level.

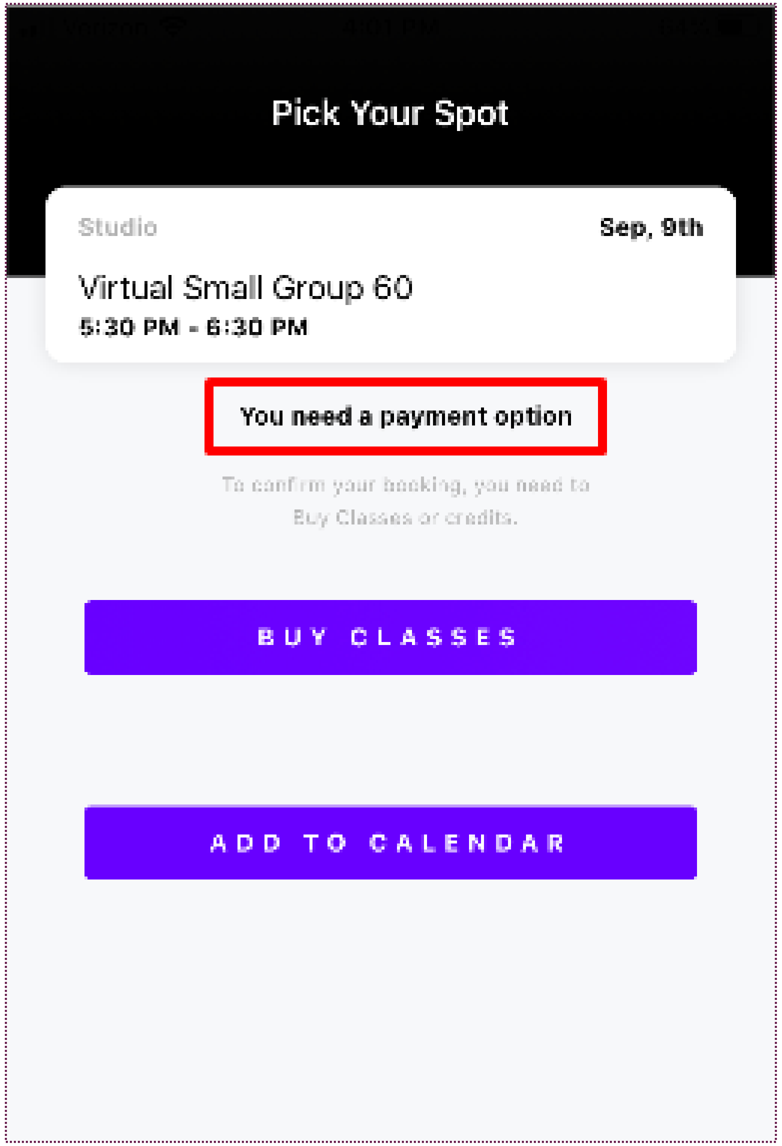
Join the Waitlist



If the waitlist feature has been enabled in the class type settings in ClubReady and the class is full, the user will select "WAITLIST".

Enable The Wait List Feature For Classes:
https://www.clubready.com/wiki/WK24964977981

Book Classes Troubleshooting



If a user cannot book into a class…

- Confirm user is in good standing (no past dues) and/or does not have a frozen agreement.
- Confirm user has an active membership (may need to adjust user's membership expiration date).
    - **Edit Membership Status:** https://www.clubready.com/wiki/WK23546050548
- If class type has membership types that do not need class credits, confirm user has the appropriate membership type and change it if necessary.
    - **Assign a Membership Type:** https://www.clubready.com/wiki/WK23729657038
- If user needs class credits, confirm user has available class credits and the right type of class credits.
    - **Manually Add Session Credits:** https://www.clubready.com/wiki/WK23347111511
- Confirm user is not attempting to book a class so far in advance that is outside what the booking policy allows as well checking the lead time set in the policy.
    - **Creating a Booking Policy:** https://www.clubready.com/wiki/WK2339967002
- If booking at another location, confirm the clubs have been set up for cross club bookings.

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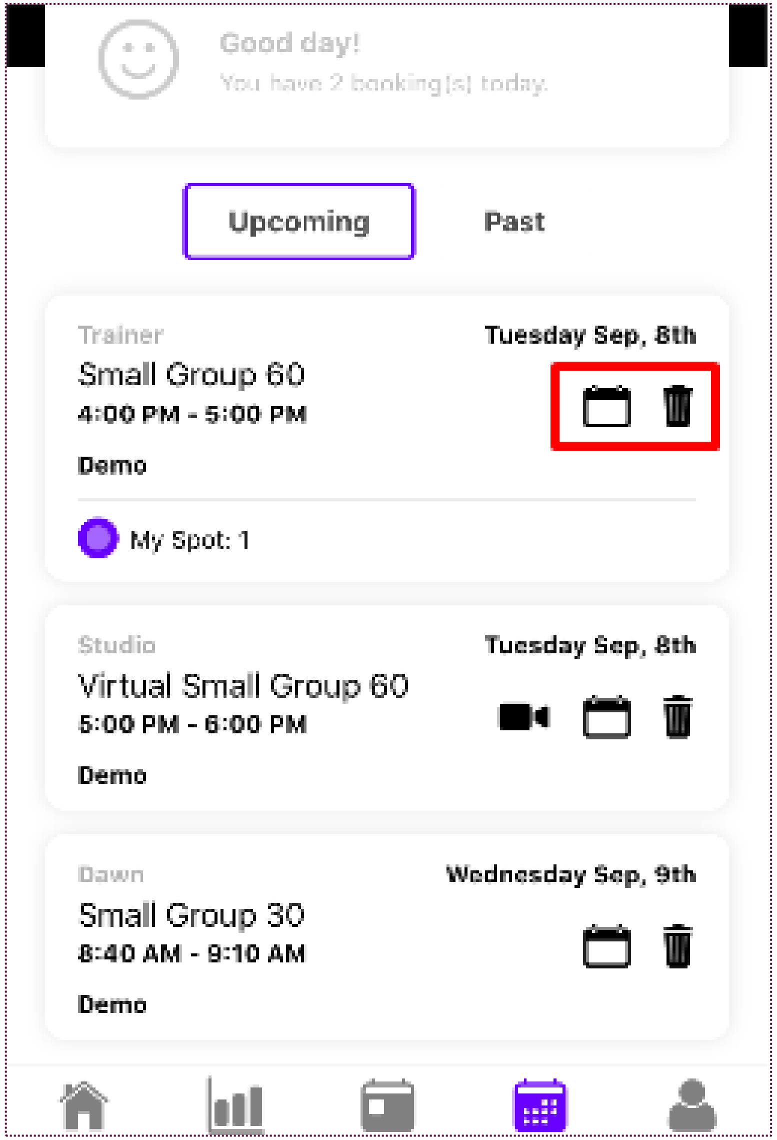
Bookings



Shows currently enrolled classes.

User can view past bookings as well.

If user allows the app to access to their calendar phone, class can be added to their calendar (calendar icon).

User can cancel the booking (click the trash bin icon).

User can launch Zoom from the app if the class is virtual and contains a Zoom link.

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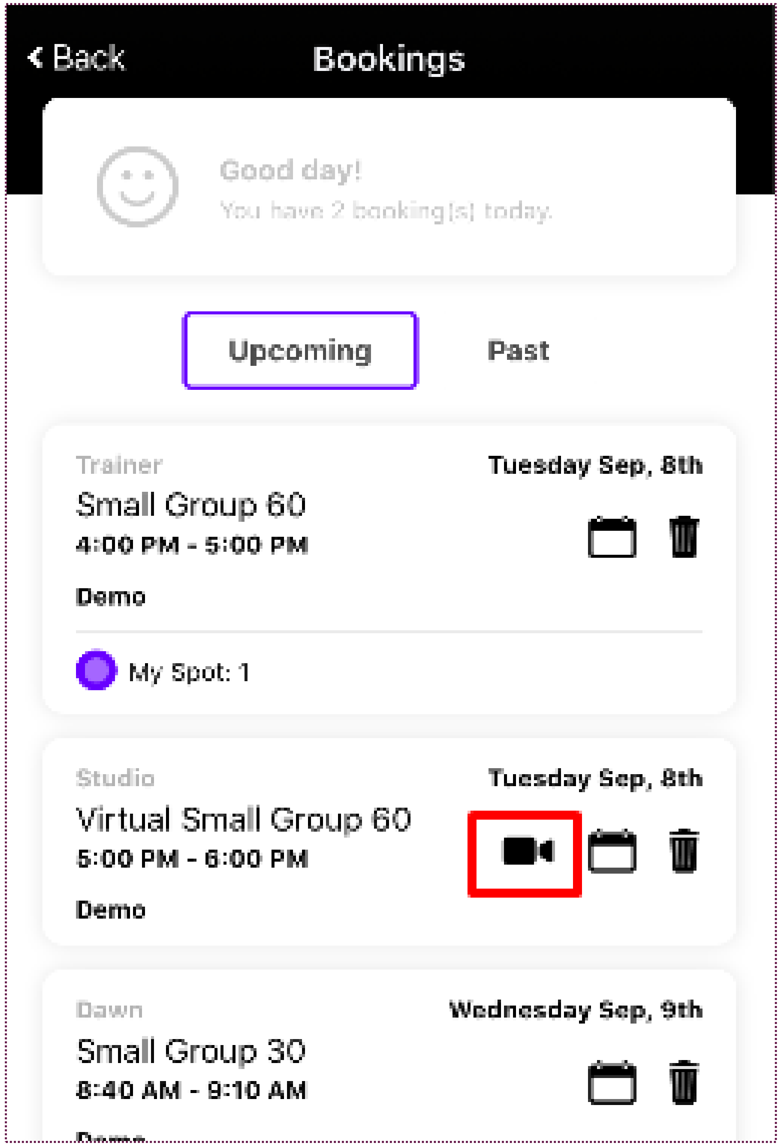
Launching Zoom



User can launch Zoom from the app if the class is virtual and contains a Zoom link.

User will click on the camera icon to launch Zoom.

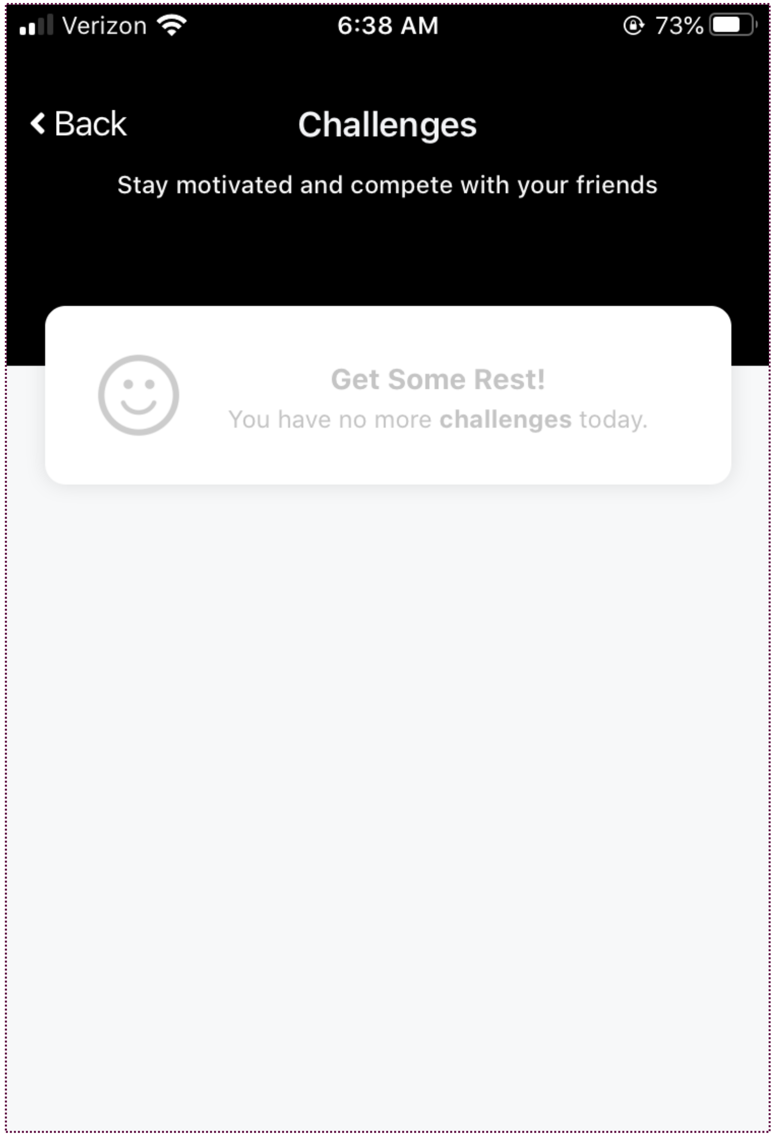
The Zoom app will need to be downloaded beforehand. If not, the user will be prompted to download the Zoom app when clicking this icon and then be brought to the Zoom meeting once downloaded.

The user cannot join the Zoom meeting until it is within 15 minutes of the class start time.

Once the icon is selected, the app will check the user into class (will be marked a 'Show' in ClubReady).

Virtual Meeting Links: https://www.clubready.com/wiki/WK38651337395

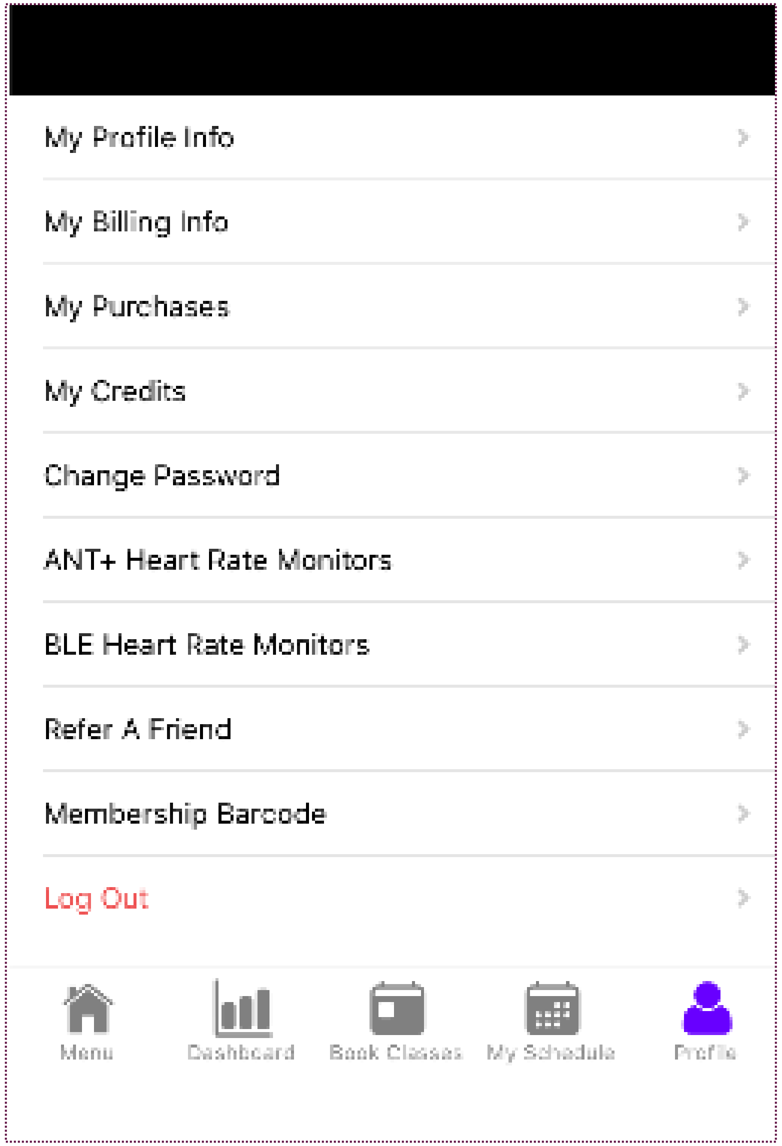
Challenges



User can view their status in current challenge that has been setup by the studio through the PerformanceIQ Admin Dashboard.

If you like to know more on this setup, please reach out individually and we can provide further training.

My Profile



- My Profile Info = basic profile information
- My Billing Info = payment profile
- Change Password = reset password
- My Purchases = purchases made through the app
- My Credits = credits remaining
- ANT+ Heart Rate Monitors = register a new HRM
- BLE Heart Rate Monitors = pair a Bluetooth enabled HRM
- Refer A Friend = can send a link to a friend to sign up at this studio (will say who user was referred by in ClubReady
- Membership Barcode = barcode for scanning into facility

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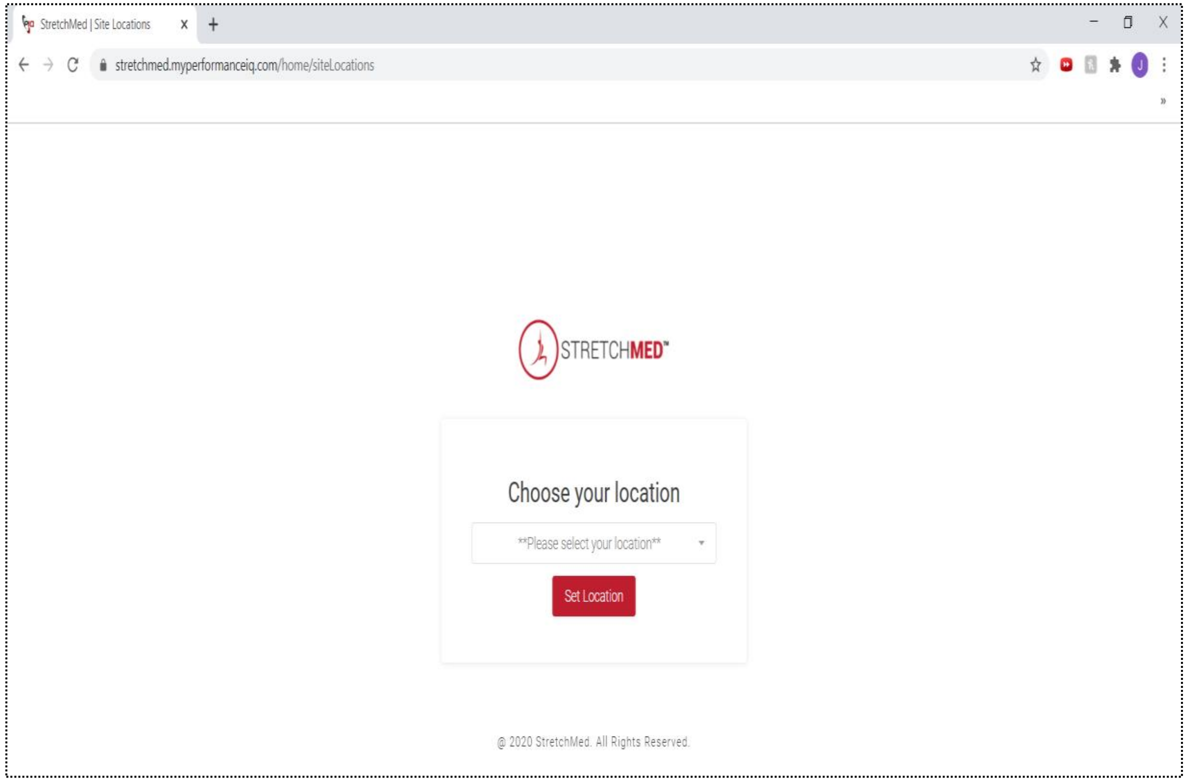
Web Portal

Web Account



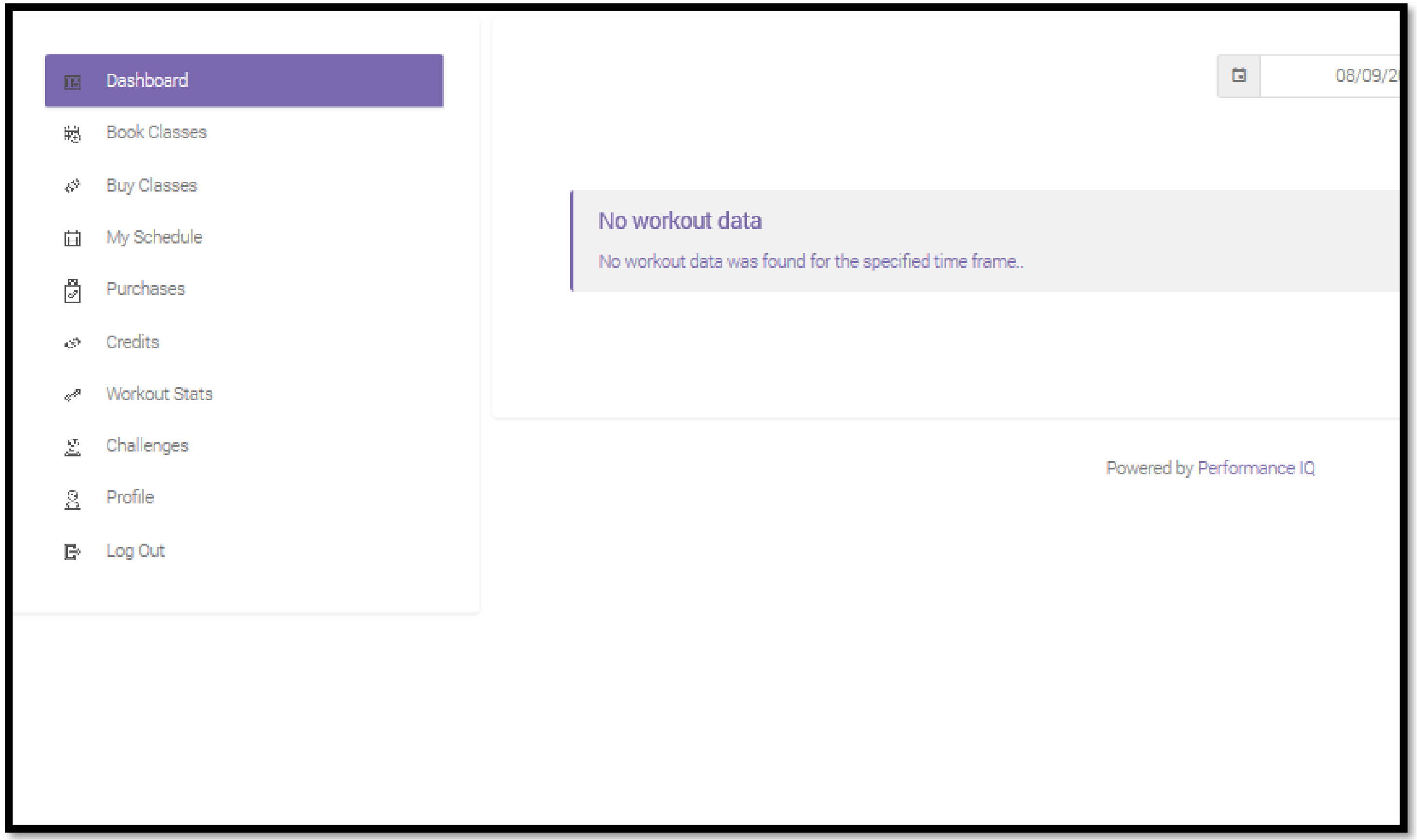
User can access their app account via the web.

Login URL: stretchmed.myperformanceiq.com

User will use same app login credentials and follow same login process as the app.

User can create an account if a new customer.

Home Screen



- Dashboard
- Book Classes
- Buy Classes
- Bookings
- Purchases
- Credits
- Workout Stats
- Challenges
- Profile

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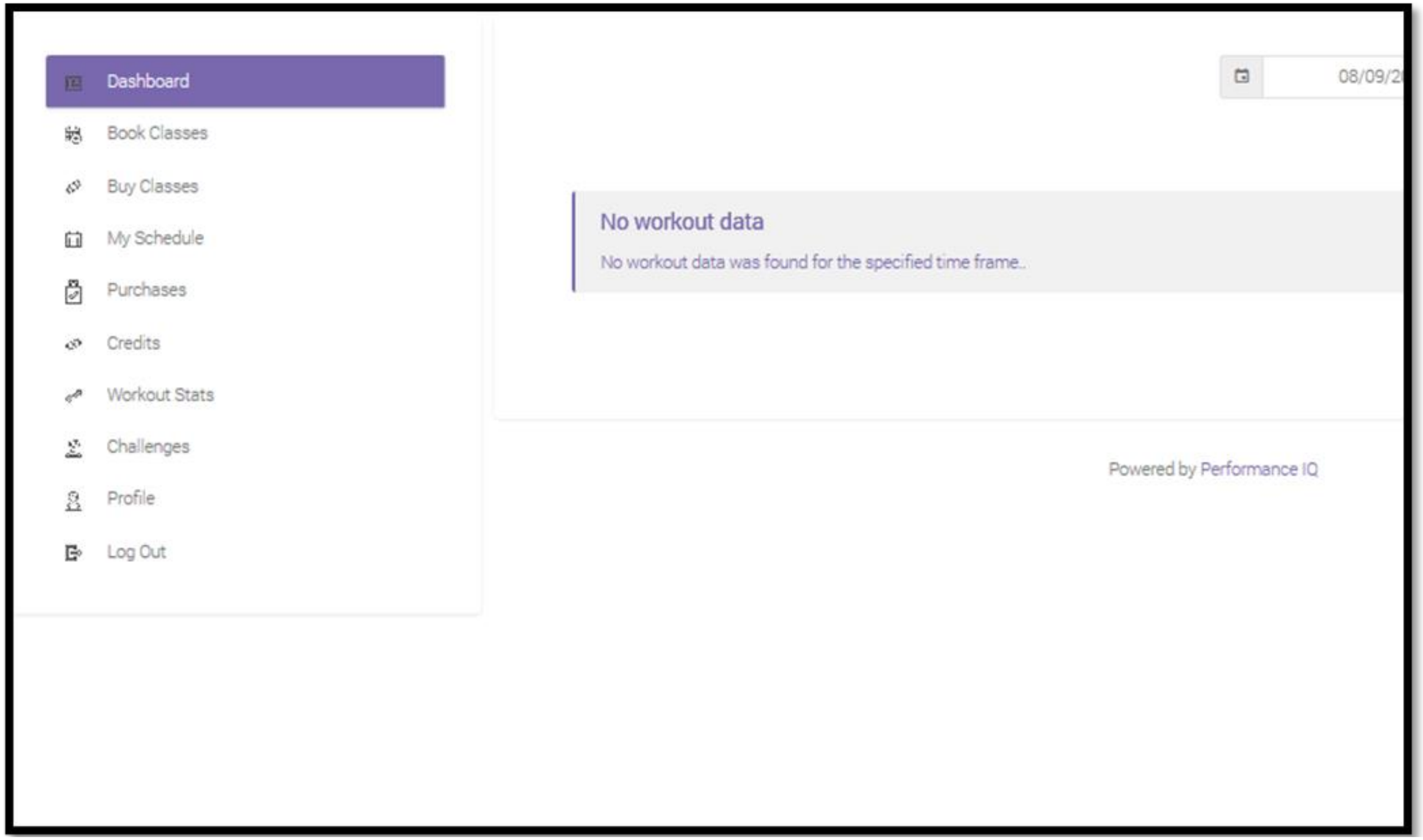
Dashboard



Shows workout stats.

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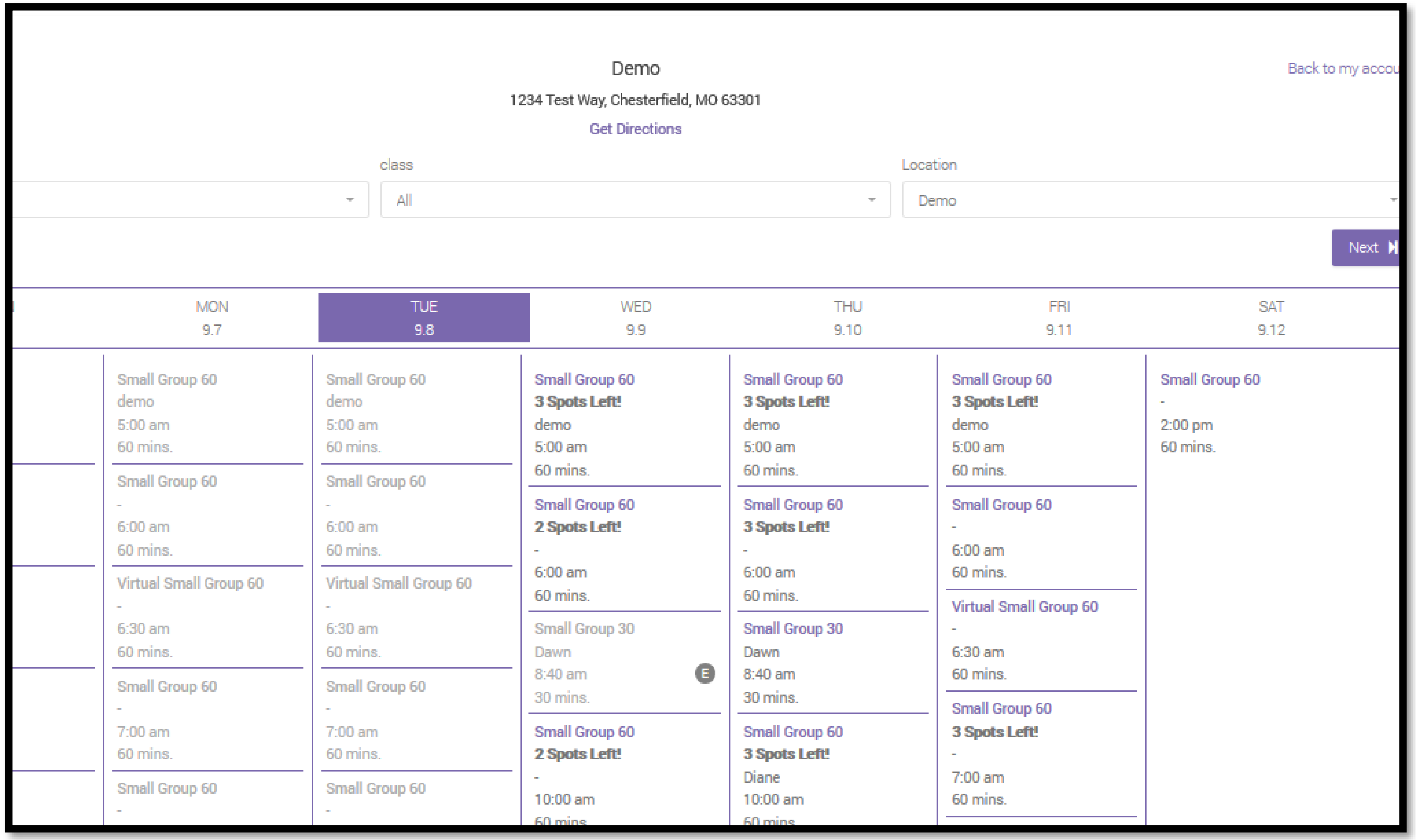
Book Classes



Book a class from the location’s schedule.

User can select another location’s class schedule here as well to cross-club book (if it has been enabled in ClubReady).

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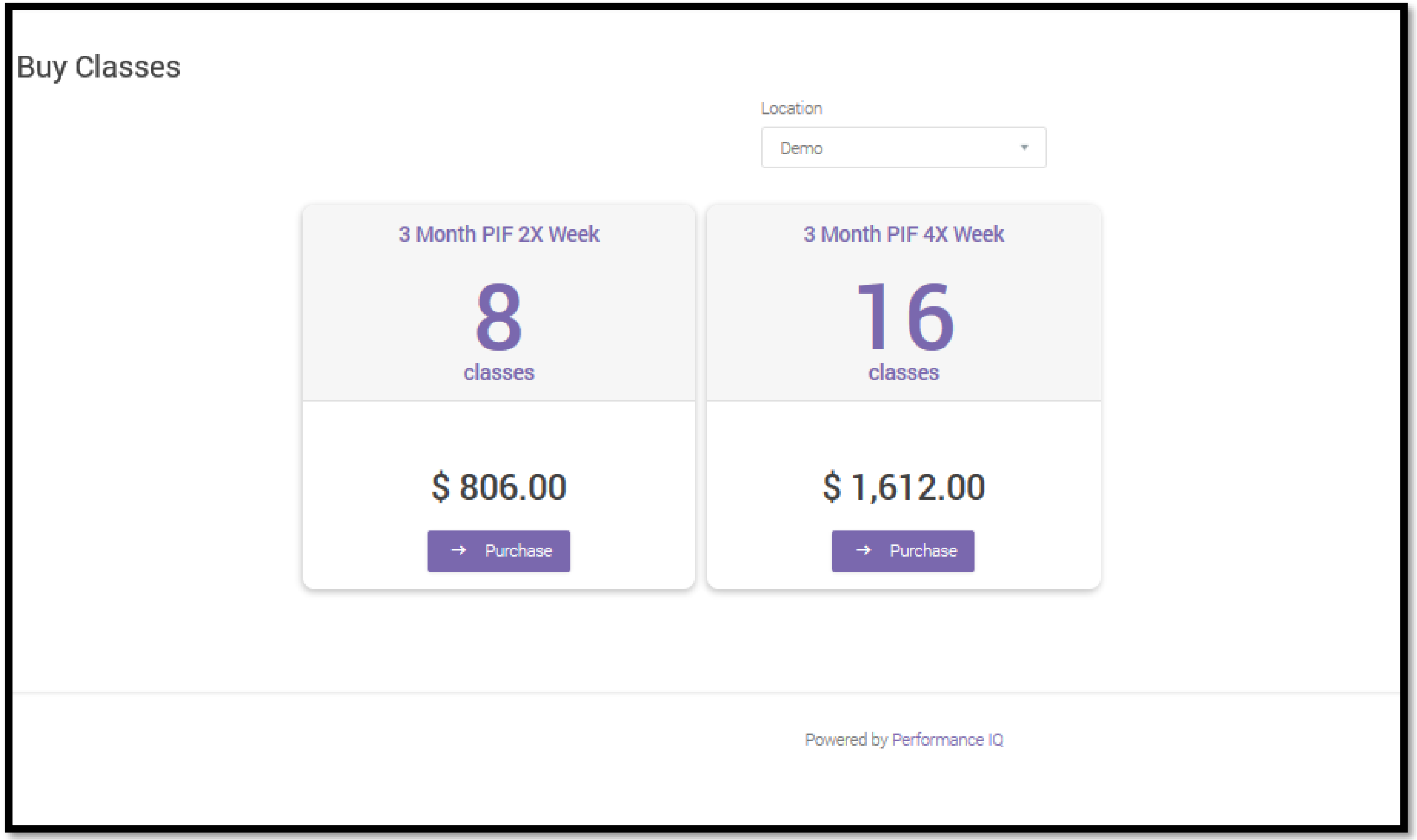
Buy Classes



Purchase a sales package that has been enabled through the app.

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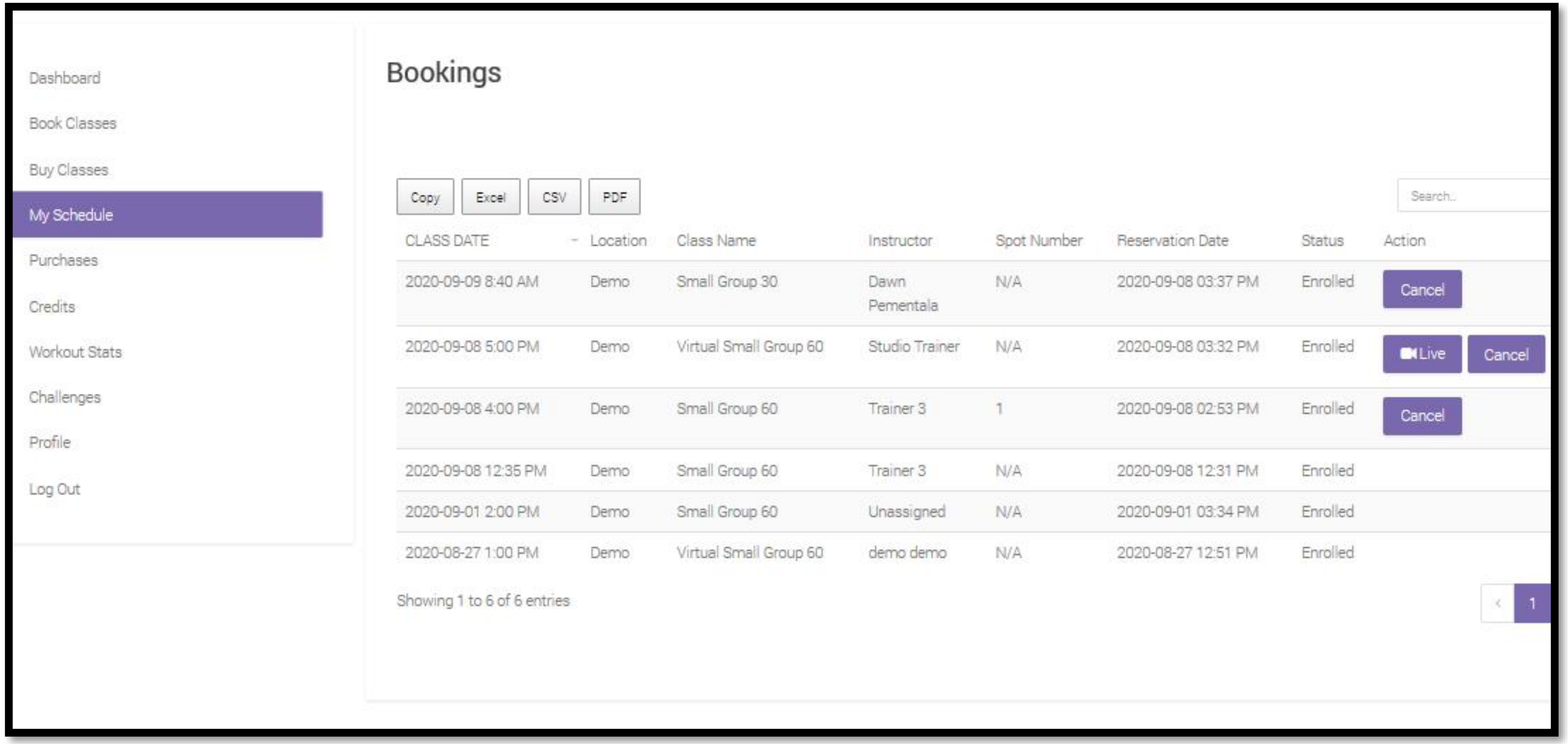
Bookings



View current and past bookings.

User can cancel a booking (user can check in to a class and launch Zoom if it is a virtual class with a Zoom link).

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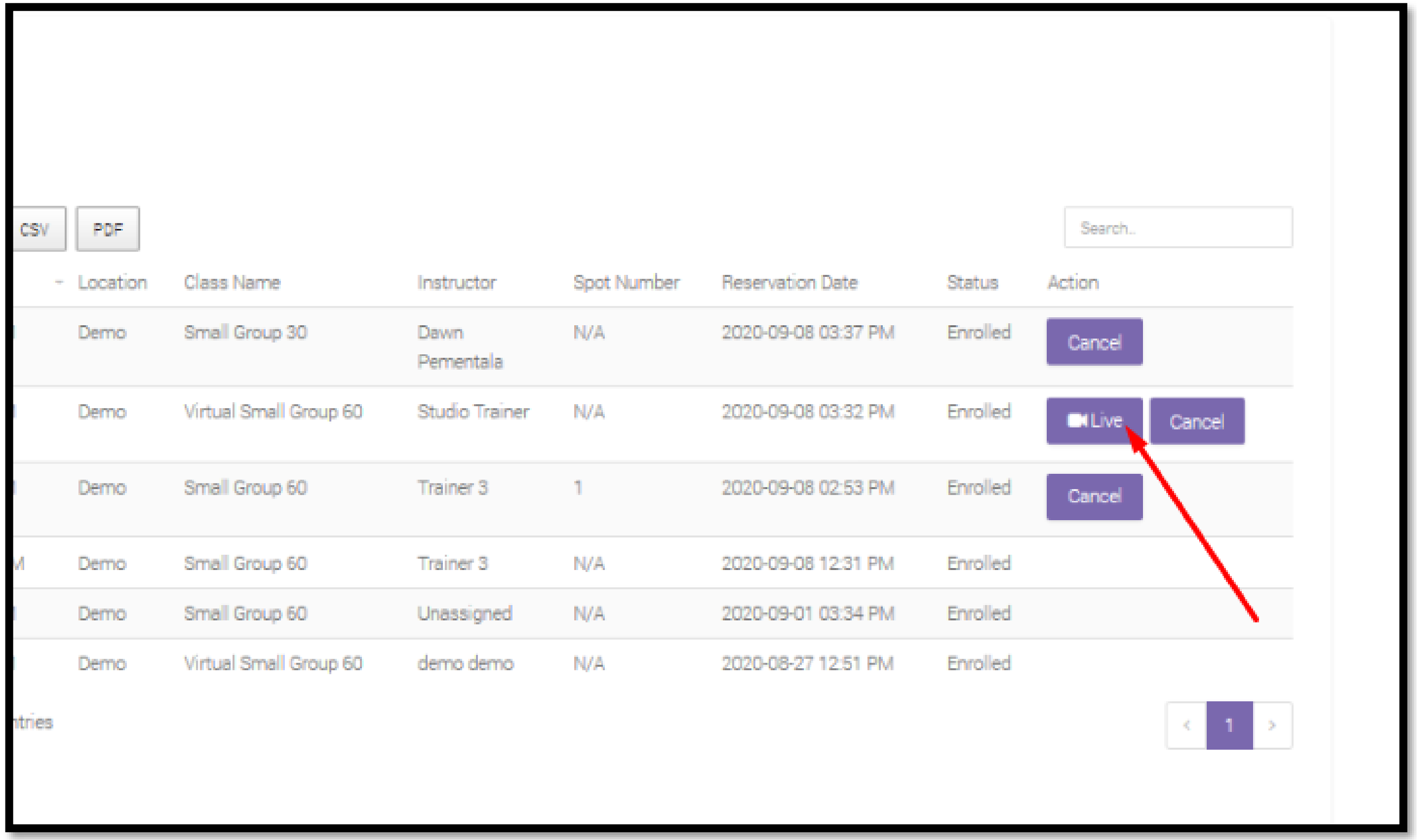
Launching Zoom



User can launch Zoom from the web account if the class is virtual and contains a Zoom link.

User will click on the **'Live'** button to launch Zoom.

The user cannot join the Zoom meeting until it is within 15 minutes of the class start time.

Once the 'Live' button is selected, the user will be checked into class (will be marked a 'Show' in ClubReady).

Virtual Meeting Links:
https://www.clubready.com/wiki/WK38651337395

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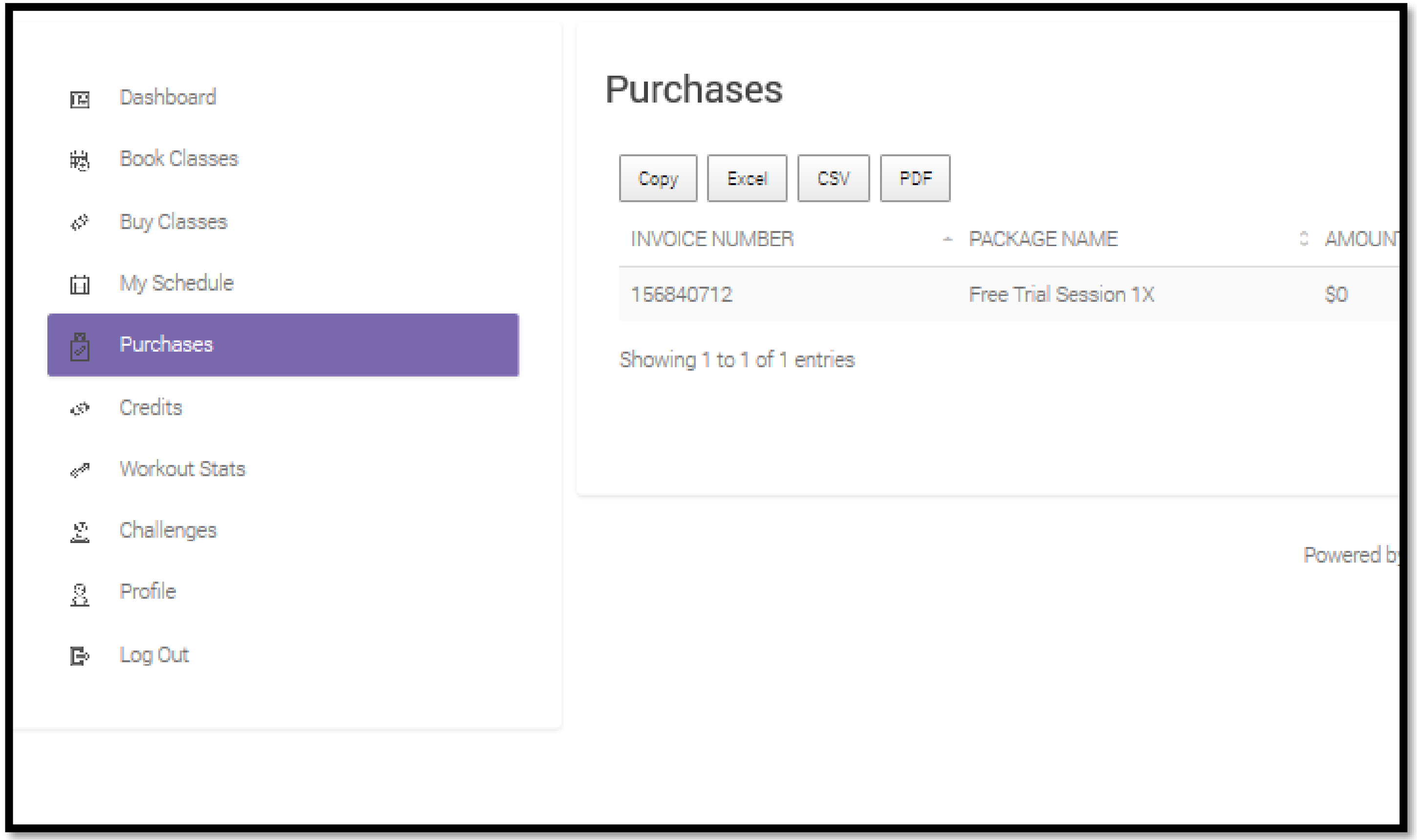
Purchases



View past sales package purchases through the app/web account.

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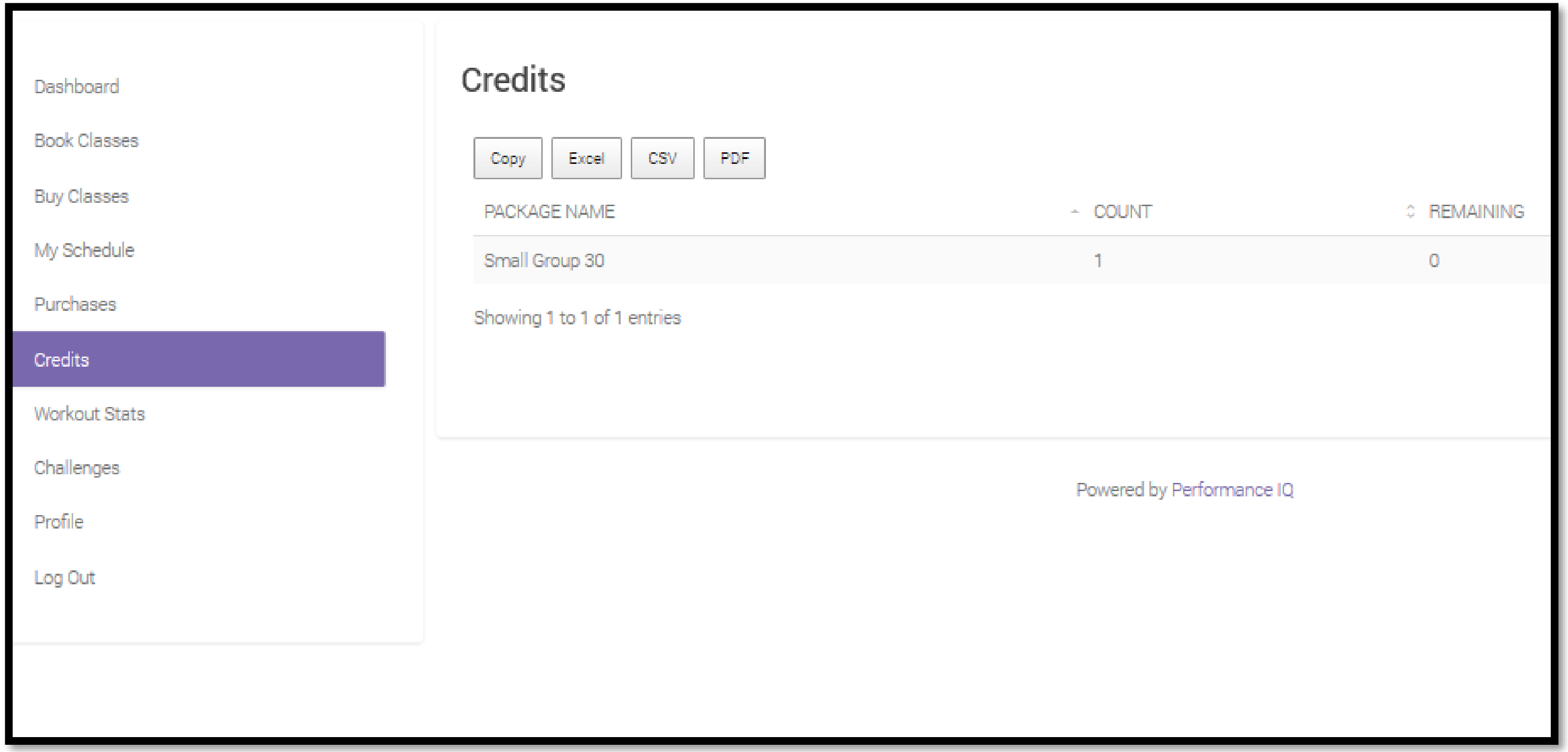
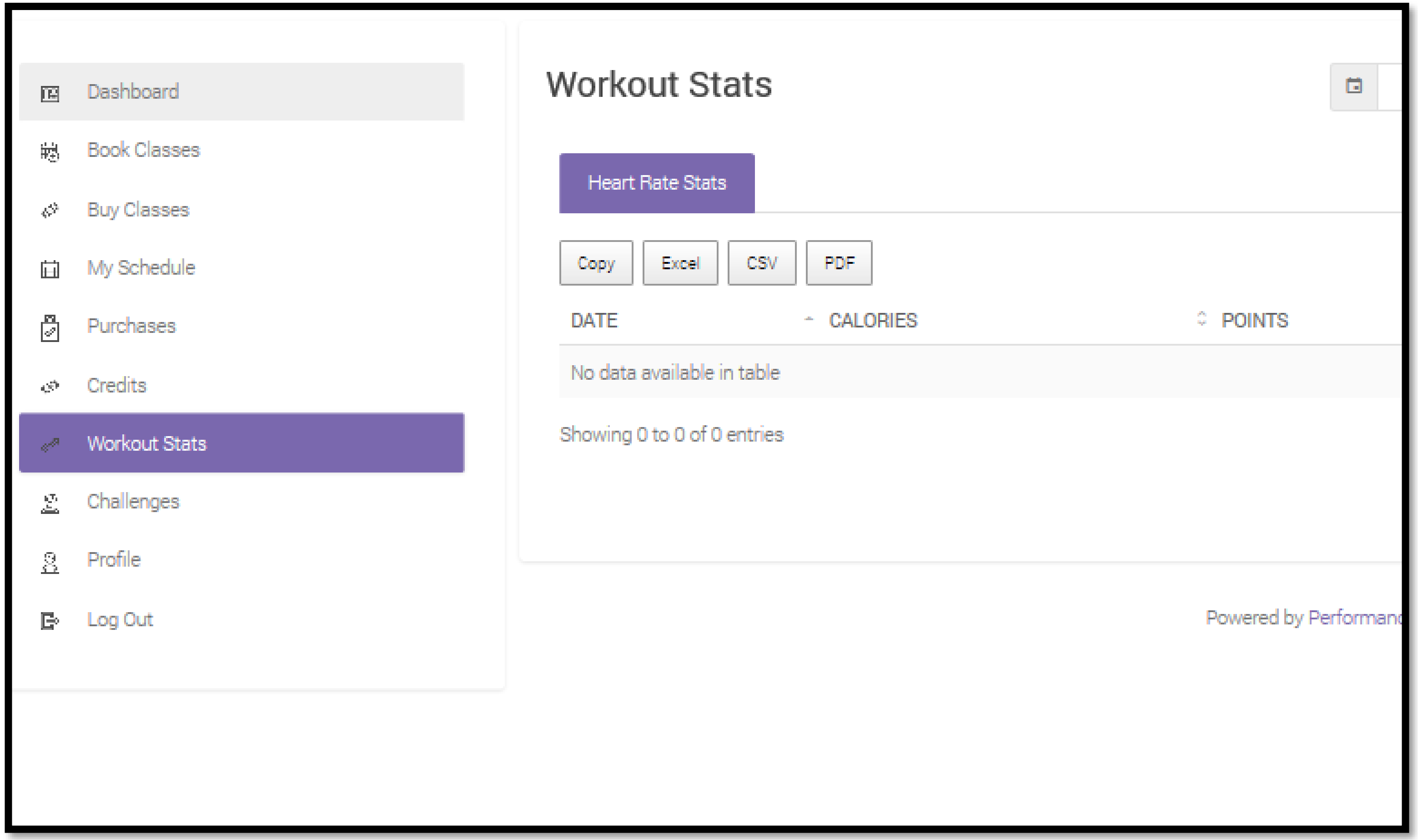
Credits



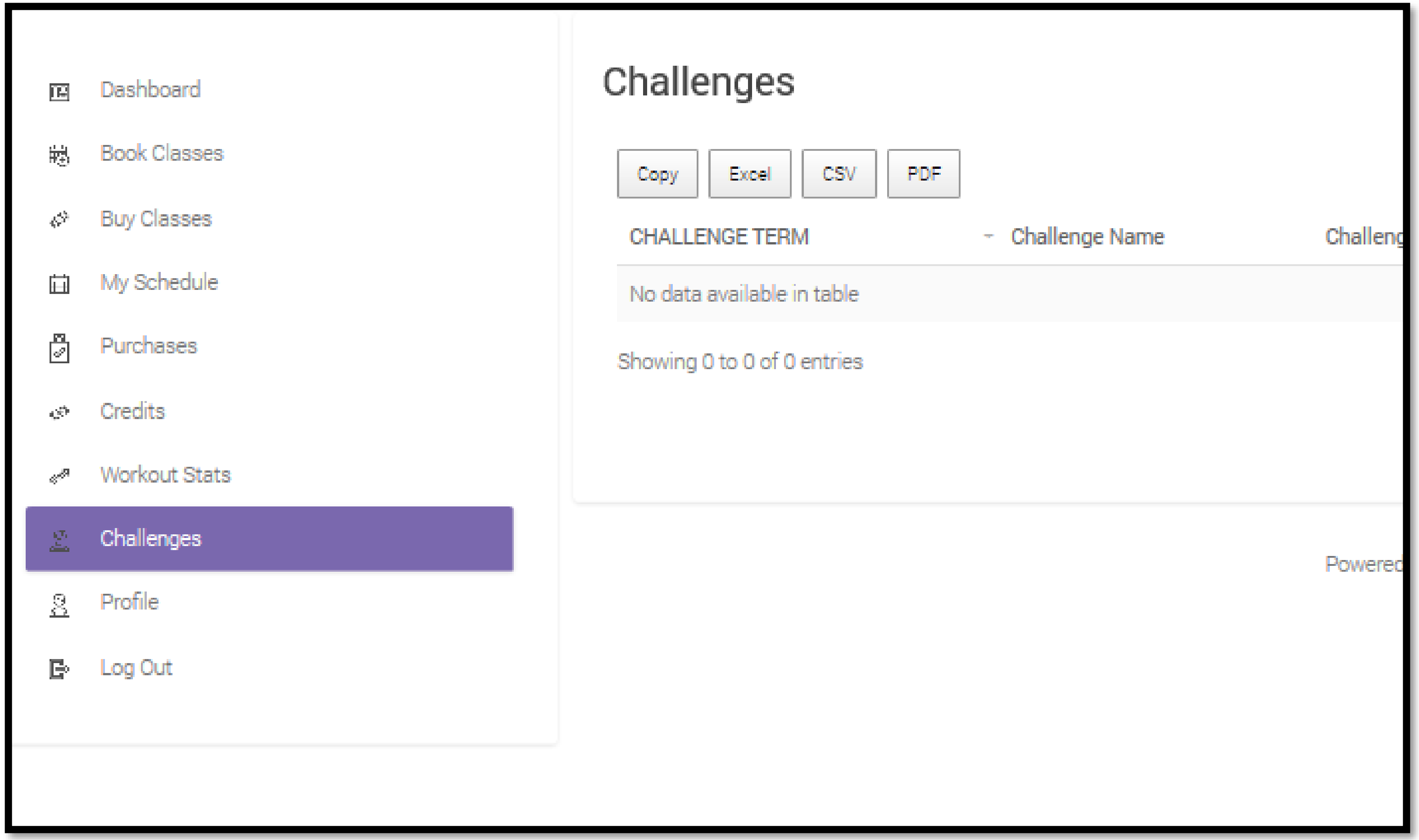
View remaining credits.

Workout Stats



View workout stats.

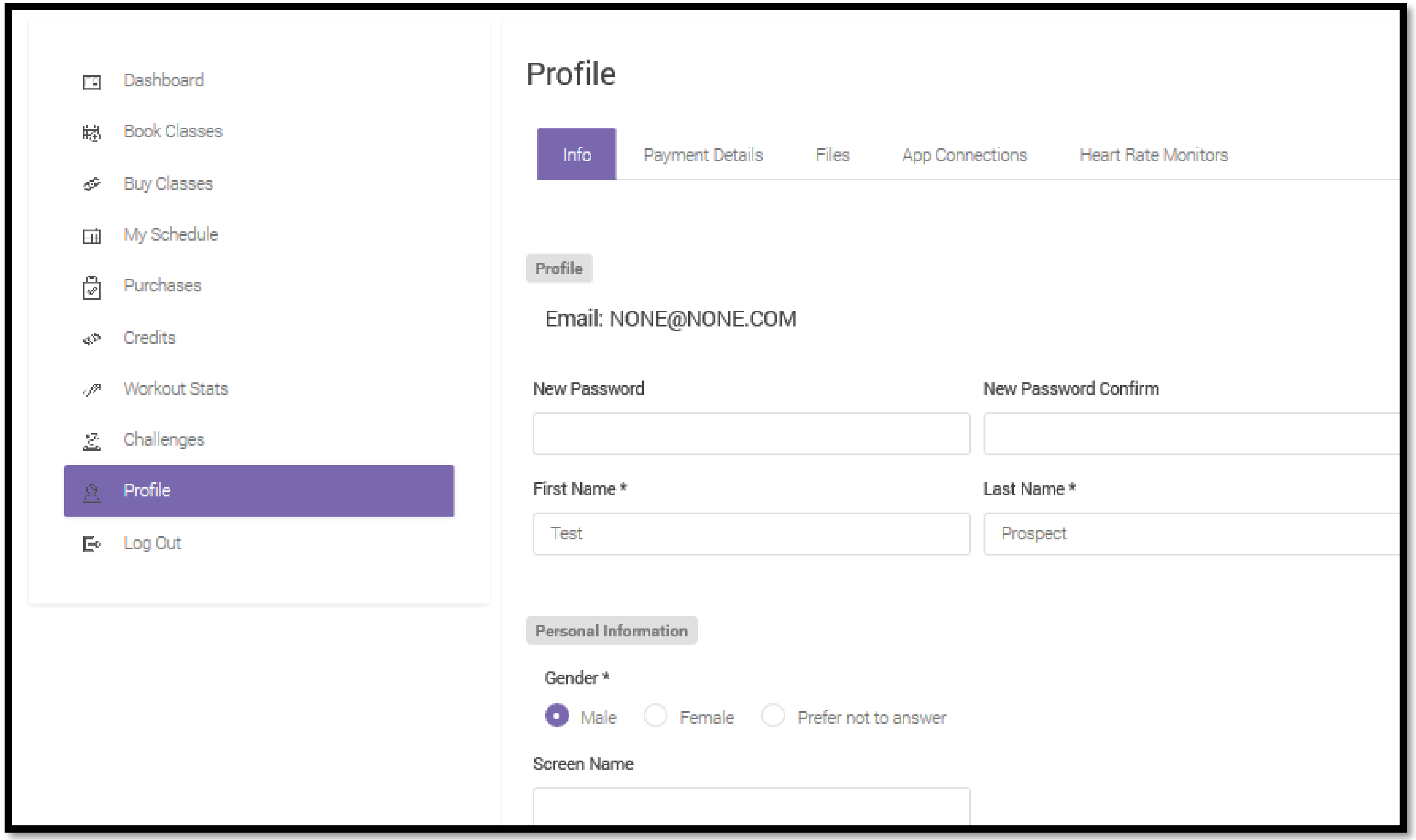
Challenges



View challenge status.

If you like to know more on this setup, please reach out individually and we can provide further training.

Profile



View/update contact information, payments profile, register new HRM.

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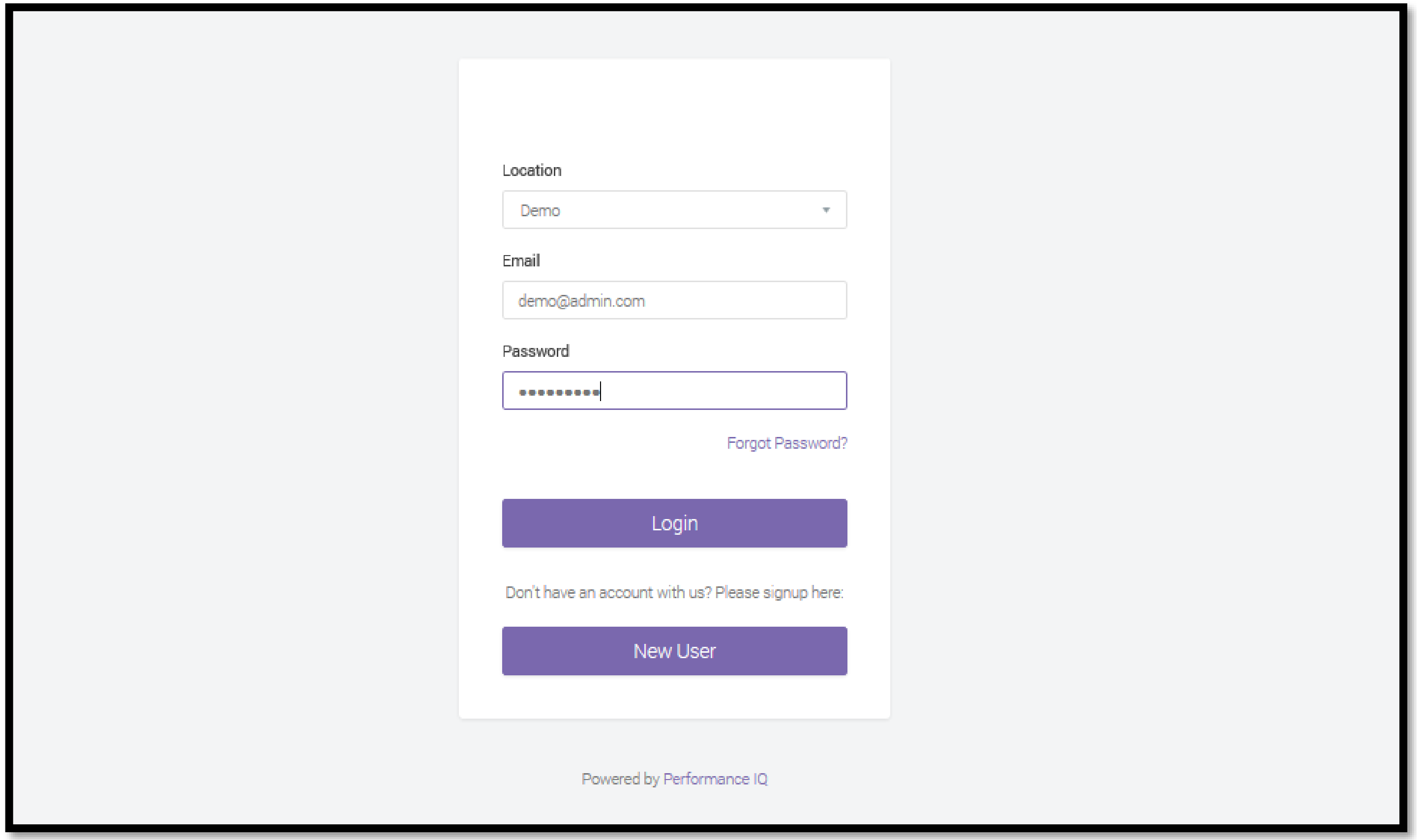
ClubReady

Admin Dashboard

What is it?



A staff/administration site for the app.

Purpose: Performing any necessary manual syncs from ClubReady, enabling sales packages to be sold through the app, creating room layouts for any class for social distancing.

An admin account will be set up for each location to access the admin dashboard and login credentials will be provided to each owner/management.

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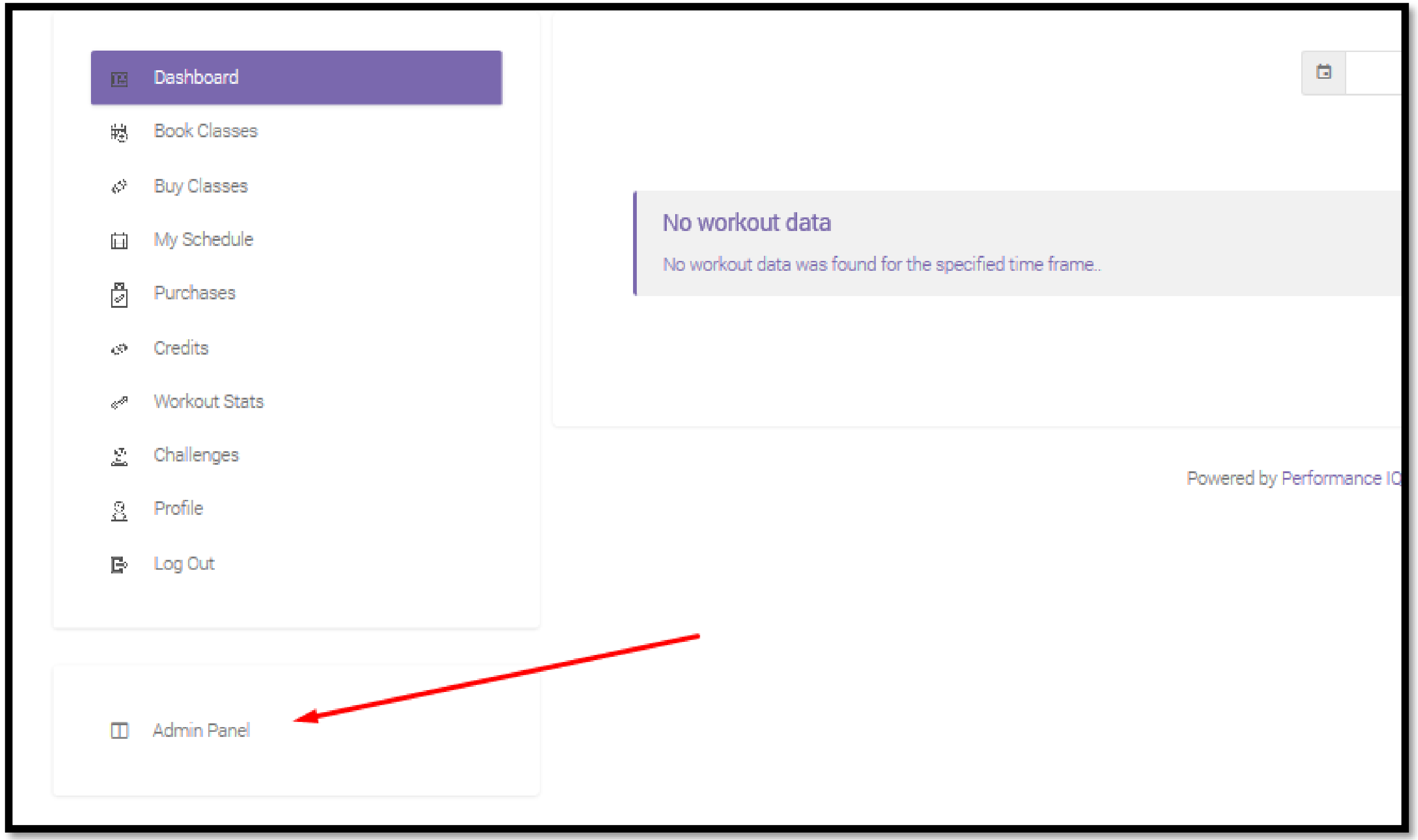
Logging In



Login URL: stretchmed.myperformanceiq.com

Use admin account login credentials.

After logging in, click ‘**Admin Panel**’ in the lower left-hand corner of the screen.

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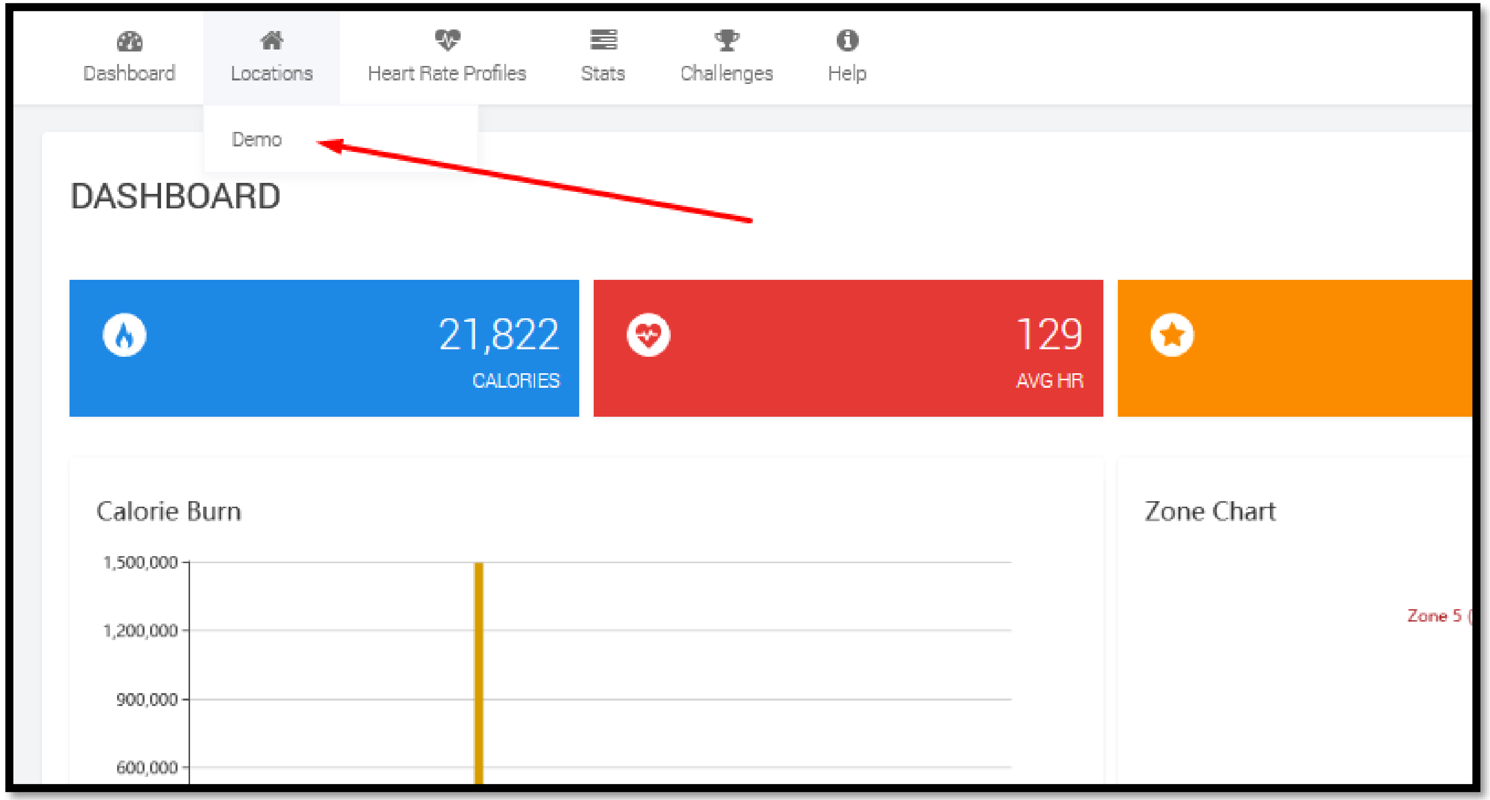
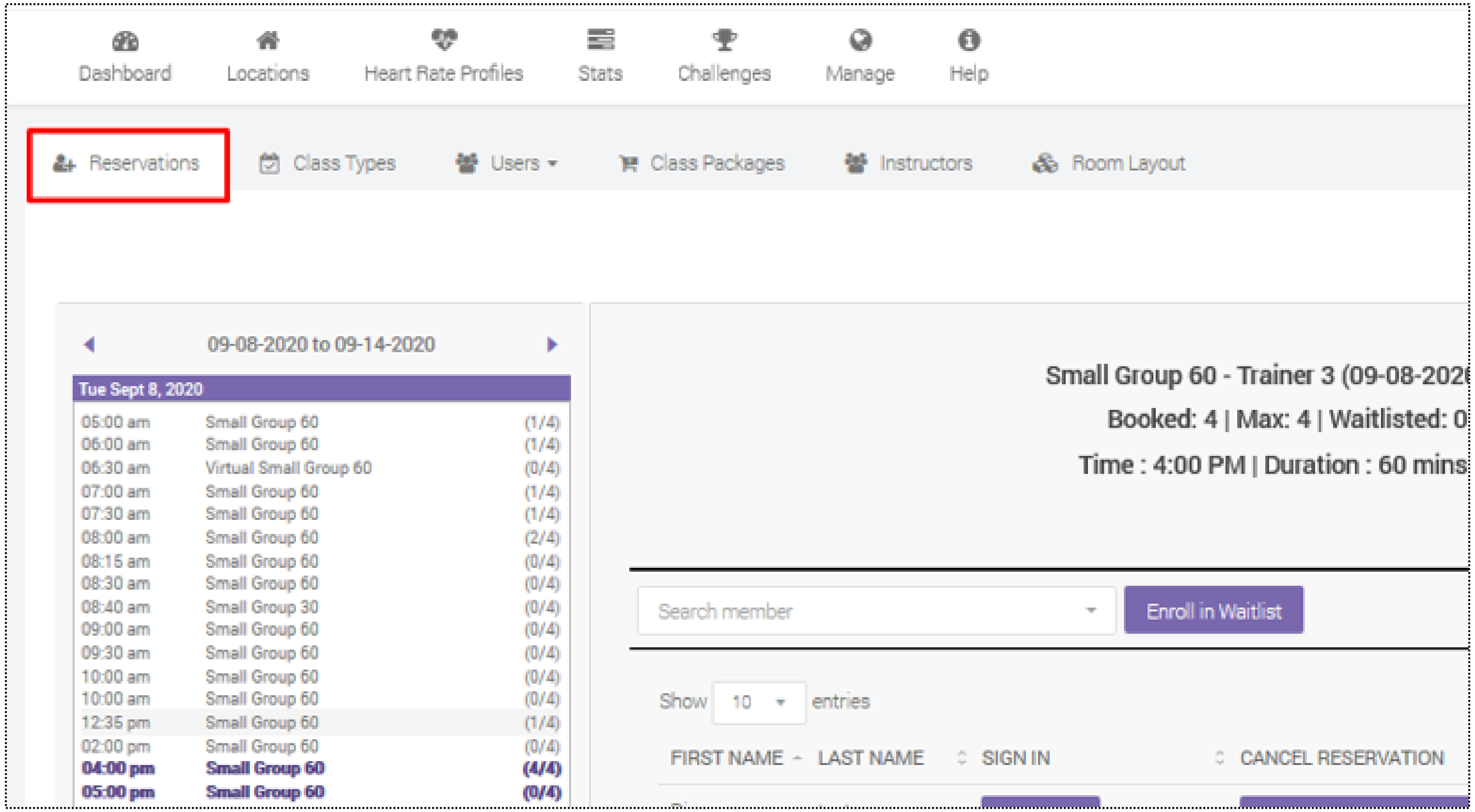
Logging In



After clicking ‘**Admin Panel**’, a new tab will open.

Hover over ‘**Locations**’ and click on your location.

Reservation



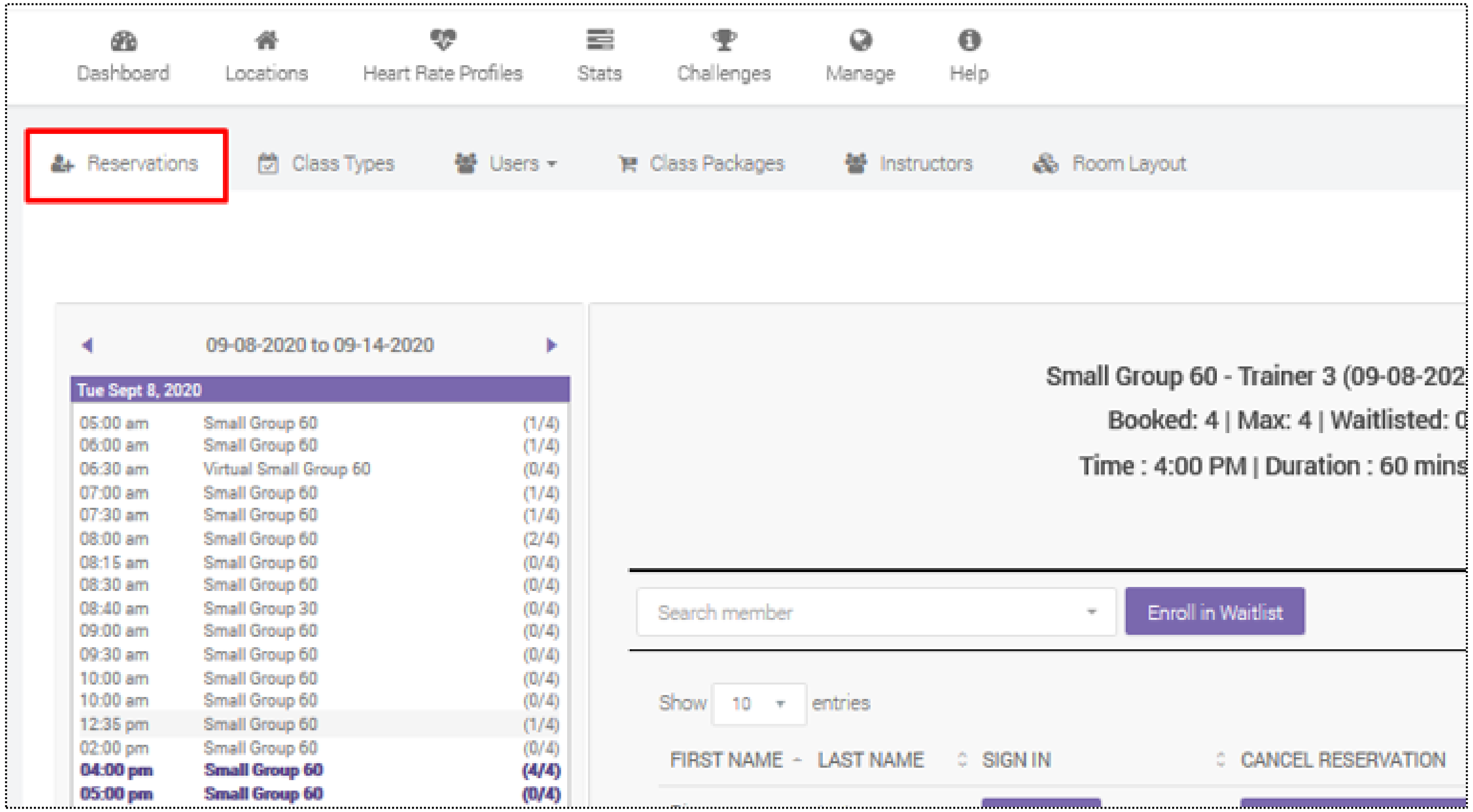
Shows class schedule, class details, and attendees.

Staff has the ability to check in a person from here and it will mark as a ‘Show’ in ClubReady for the attendee.

The reservation can also be cancelled for the attendee.

Staff can also add a new booking in this view.

Launching Zoom

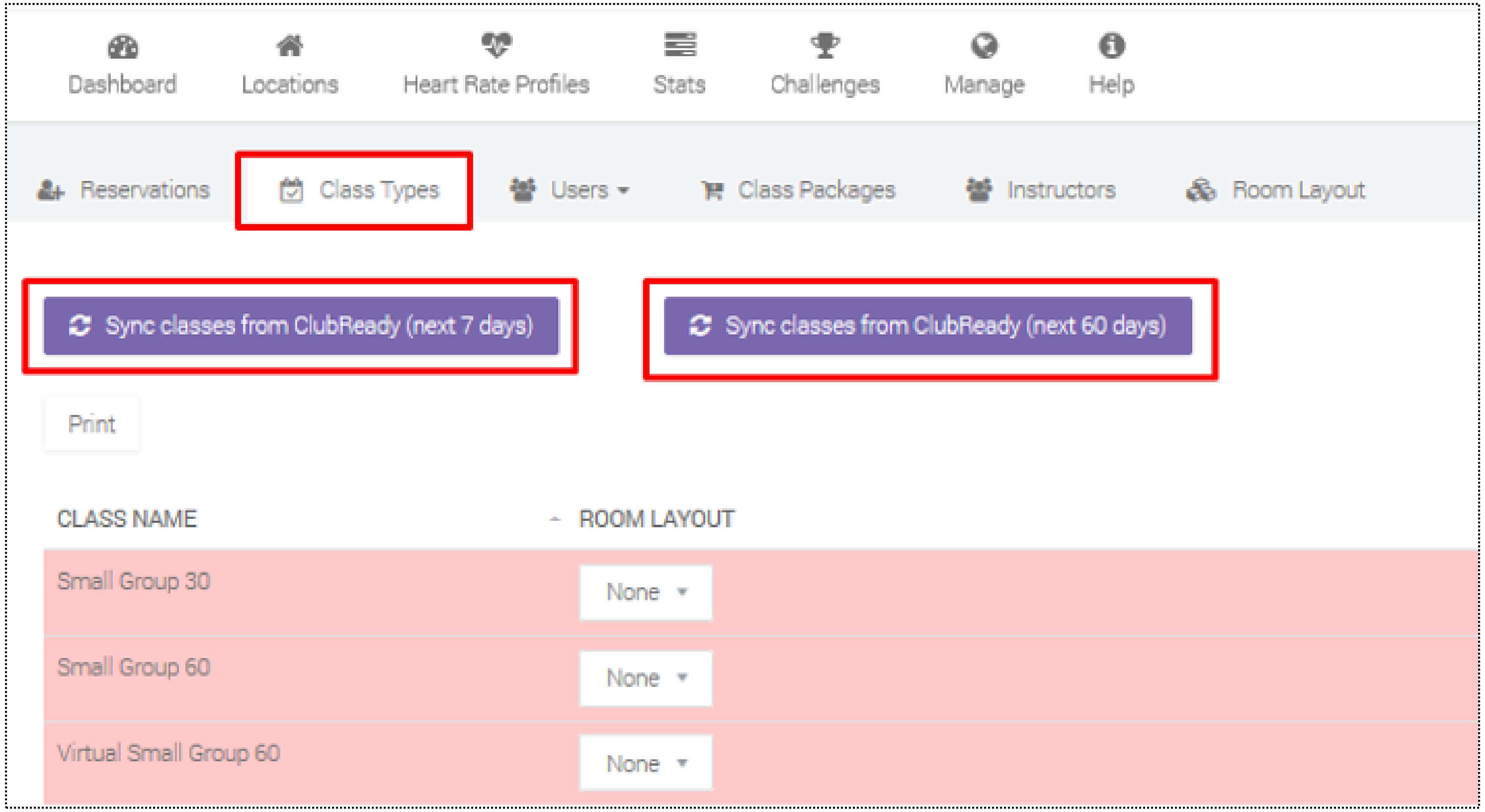


If a Zoom link has been entered for the class in ClubReady, it will appear here for the instructor to click and begin the meeting.

This link can also be accessed and selected through ClubReady.

Virtual Meeting Links:
https://www.clubready.com/wiki/WK38651337395

Class Types

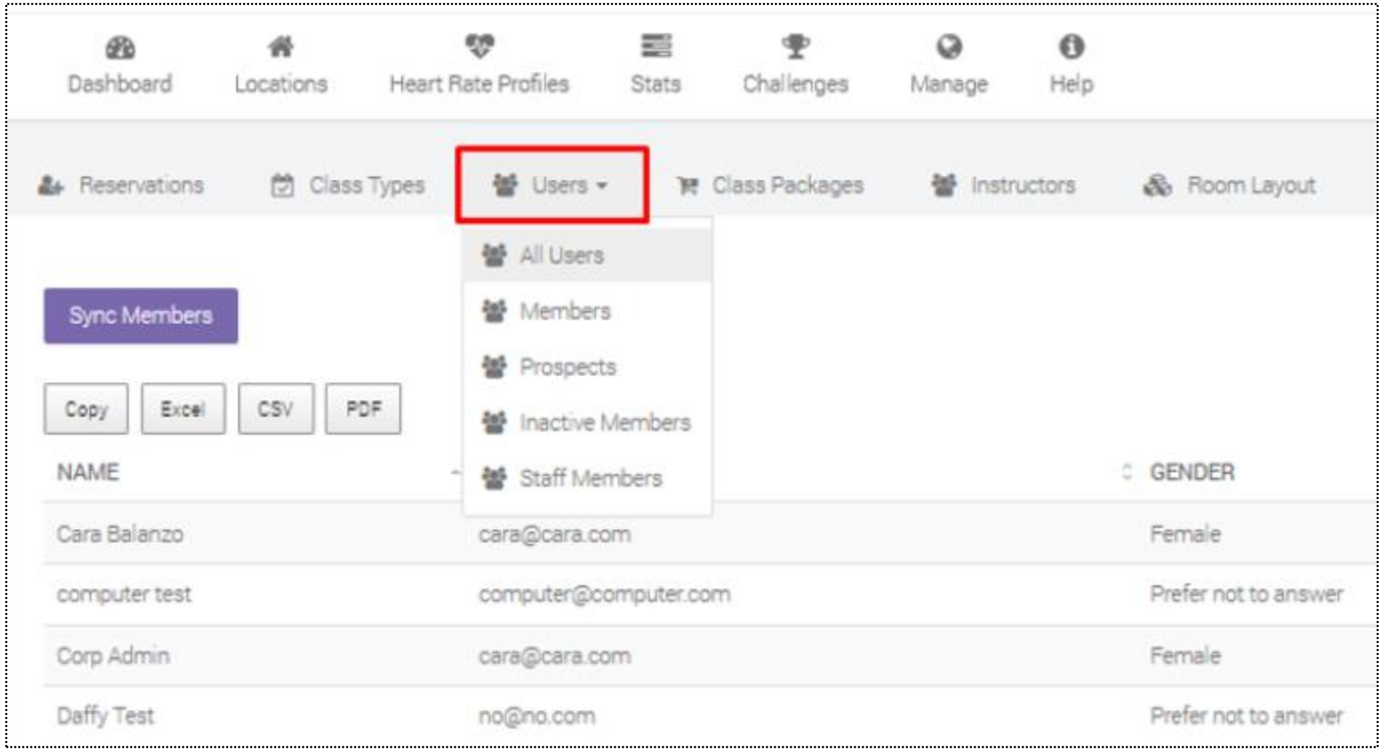


Shows all class types that have been synced from ClubReady that are enabled and visible in the app.

The system will auto sync any schedule changes made in ClubReady every 3 hours.

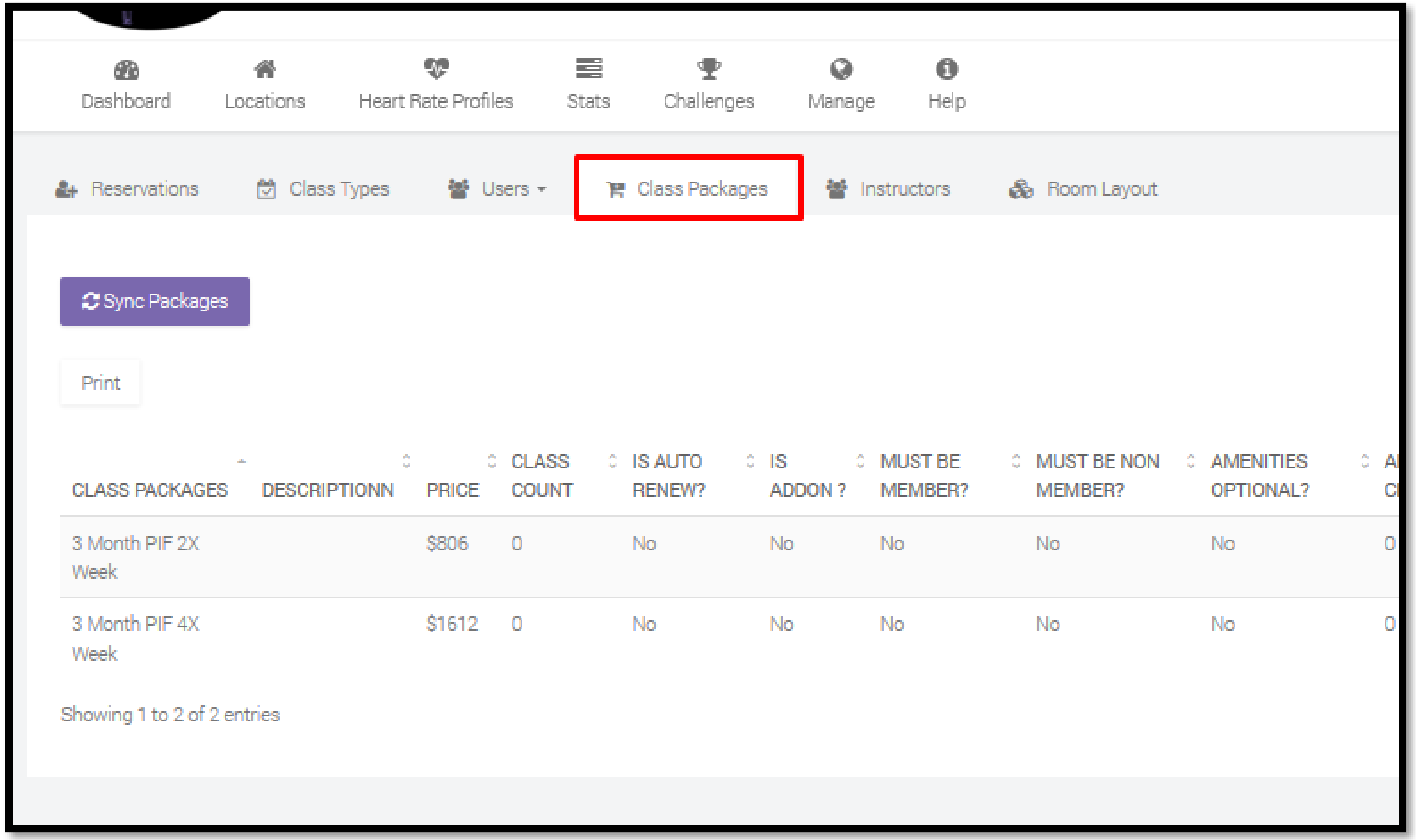
If a schedule change needs to be updated immediately, use the manual sync button.

Users



- Users tab will show all accounts from your ClubReady site
- All Users = all prospects, members, inactive members, staff members
- Members = all members
- Prospects = all prospects
- Inactive = all inactive members
- Staff Members = any account with access to the admin dashboard (this is not staff from your ClubReady site)

Class Packages



Shows any sales packages that has been setup in your ClubReady site to be sold in the app.

The sales packages listed still need to be activated in order to be viewable/purchased in the app.

Please refer to this knowledgebase article on setting up sales packages in the app: https://www.clubready.com/wiki/WK39908408736

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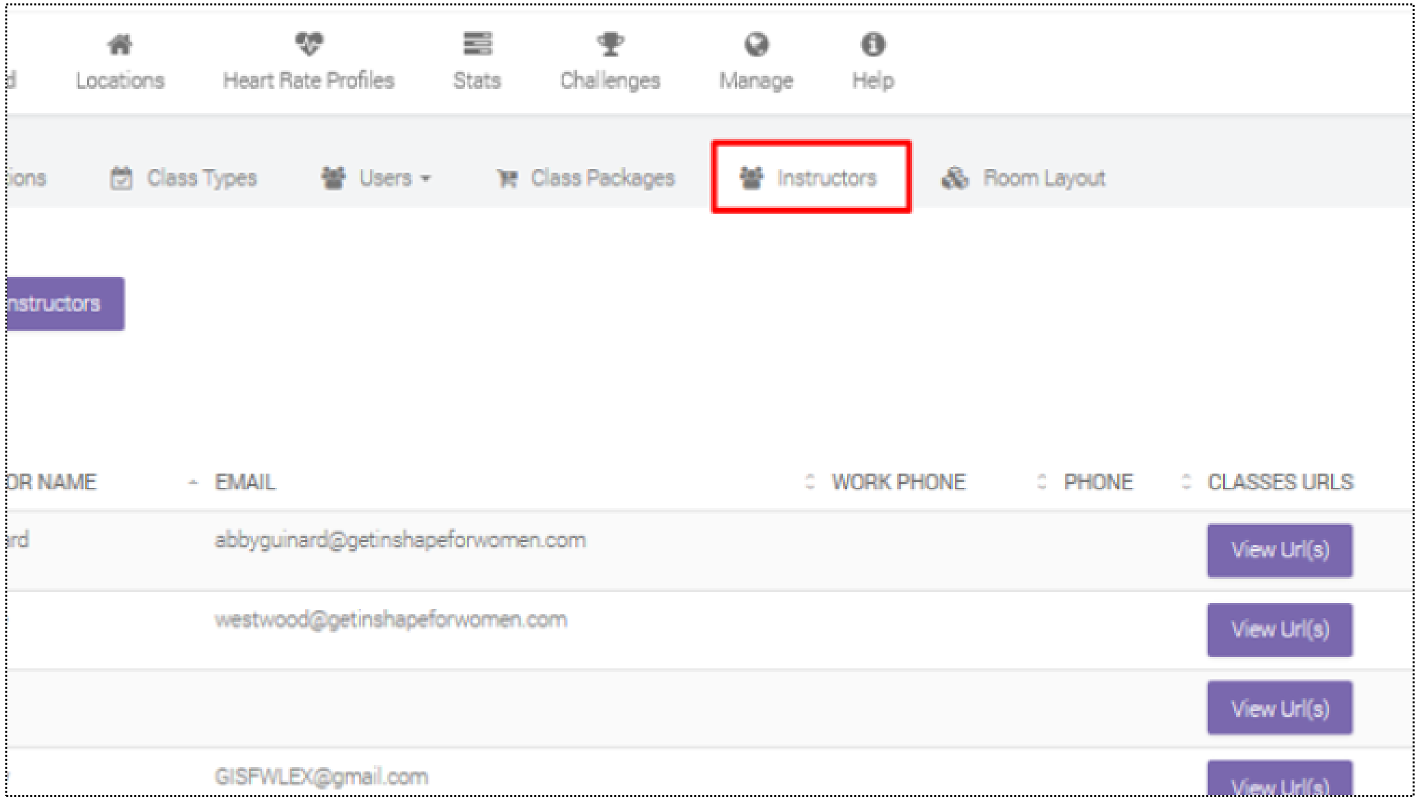
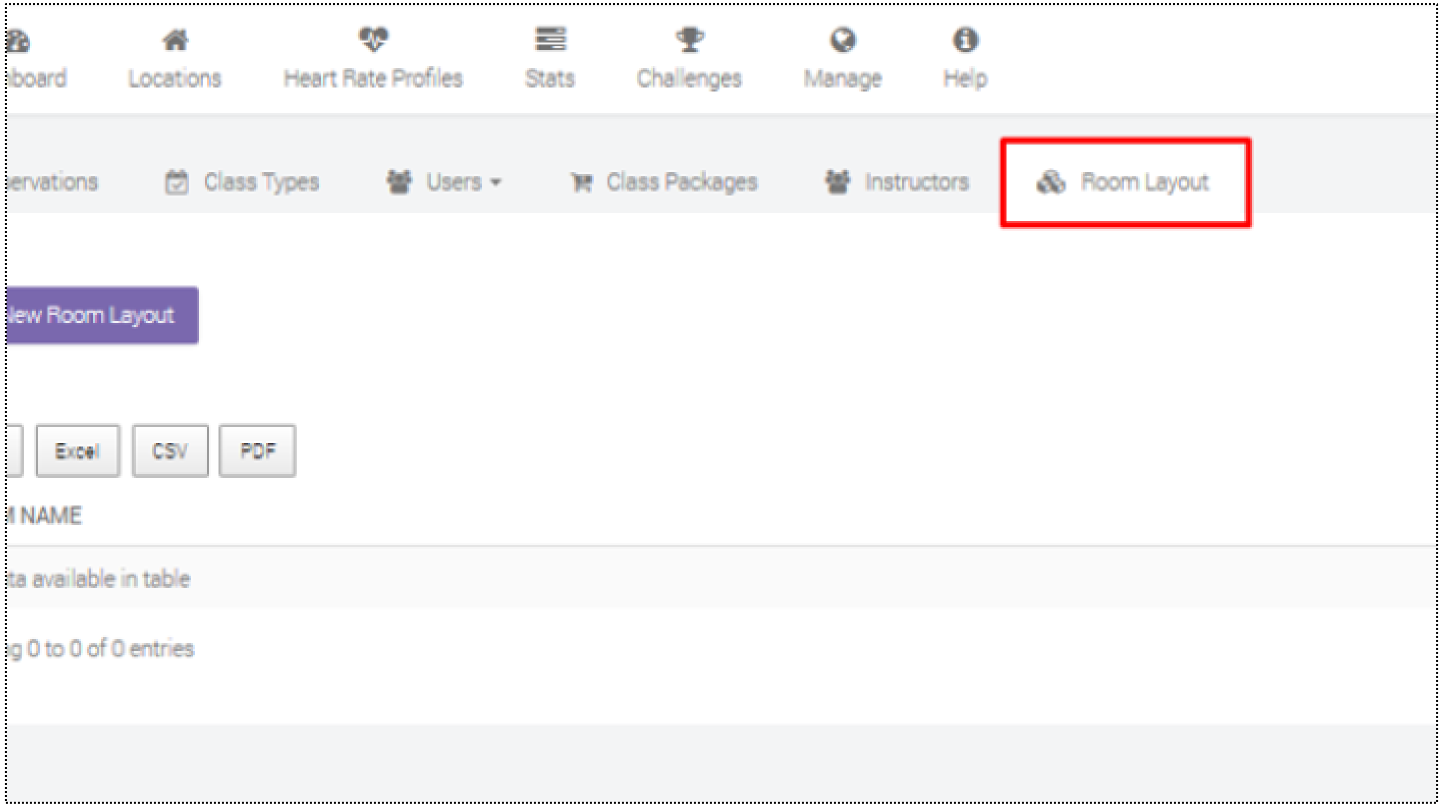
Class Instructors



Shows all staff setup for scheduling in your ClubReady site.

Please refer to this knowledgebase article on setting a staff member up for scheduling: https://www.clubready.com/wiki/WK18578876433

Room Layout



Creating a room layout allows for spot booking for a particular class type.

You can use the room layout feature to create social distancing, limit which bags are used, and give members direction on which bag to go to when arriving for class. (Make sure to number the bags).

Once your room layout is created, navigate back to the 'Class Types' tab and assign the room layout to the class type.

You can create as many different room layouts as needed.

Ensure that the number of spots in the room layout is equal to the mas attendees limit in the class type settings.

Creating A Room Layout:
https://www.clubready.com/wiki/WK39824202471

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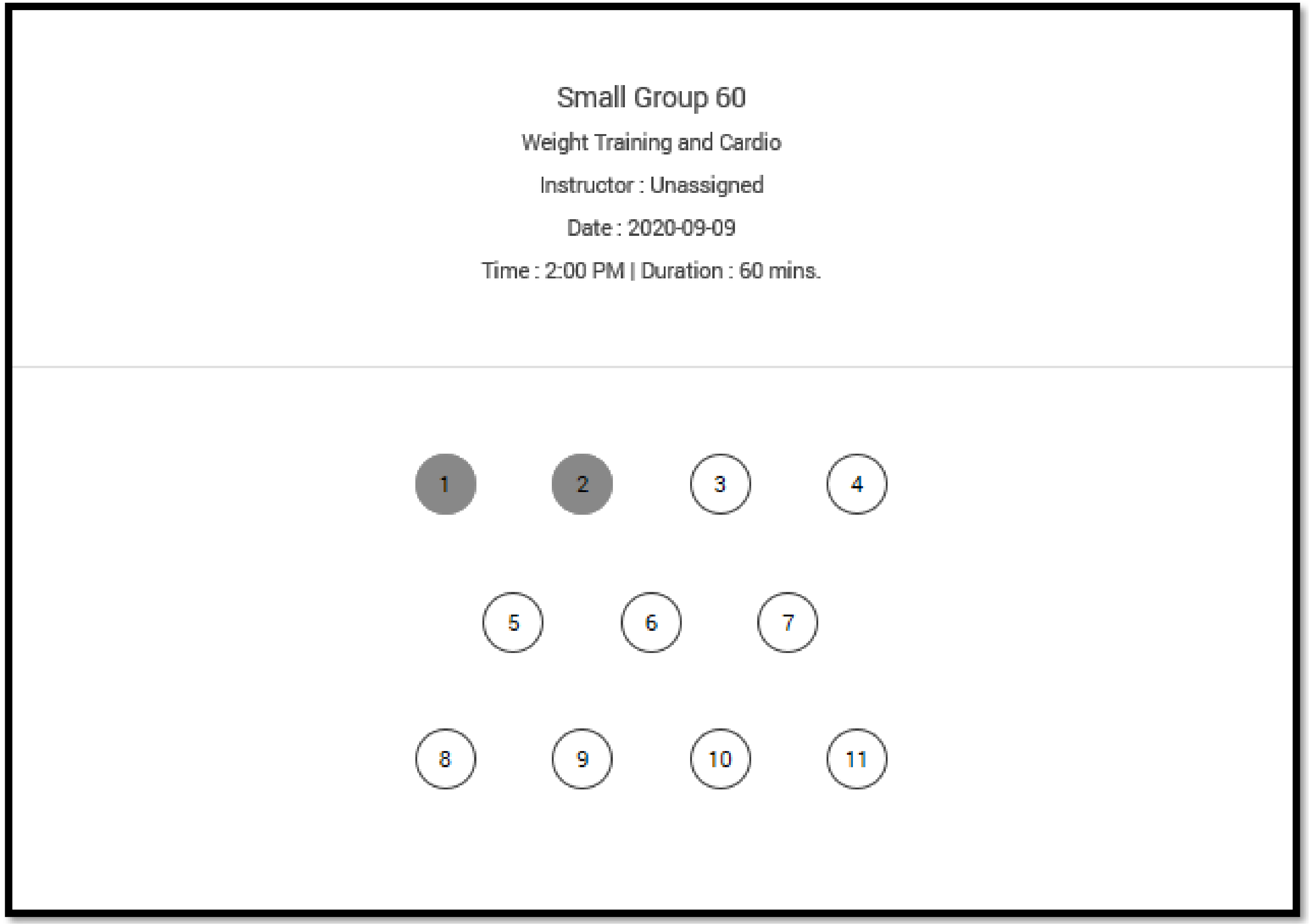
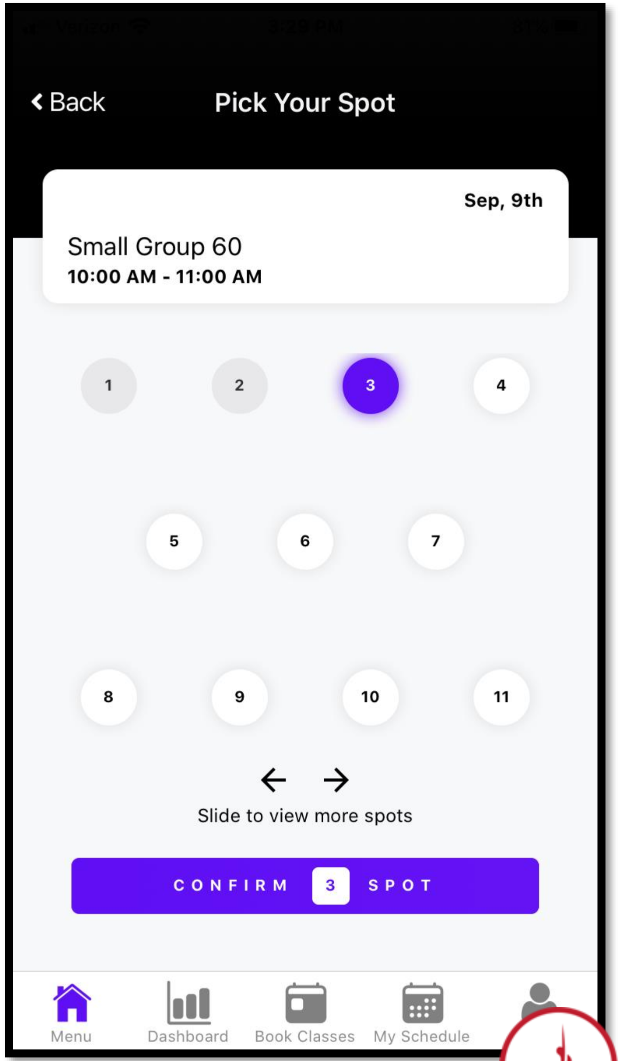
User View





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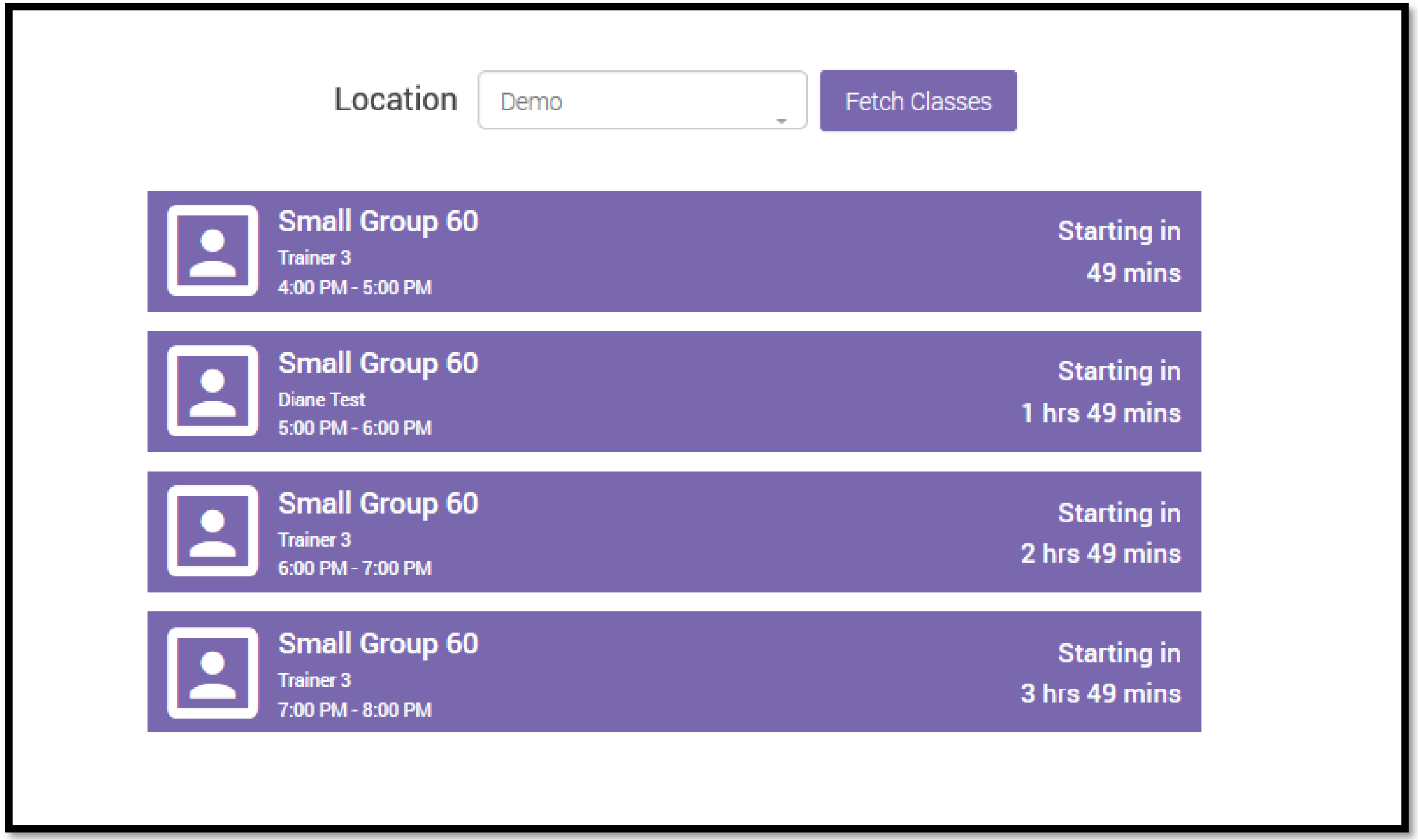
Check In Kiosk

Class Check In Kiosk



The PerformanceIQ class check-in kiosk can be opened on a tablet or iPad and allow for a quick, seamless check-in process.

It is web-based so there is no need to download an app and it immediately syncs with your ClubReady site.

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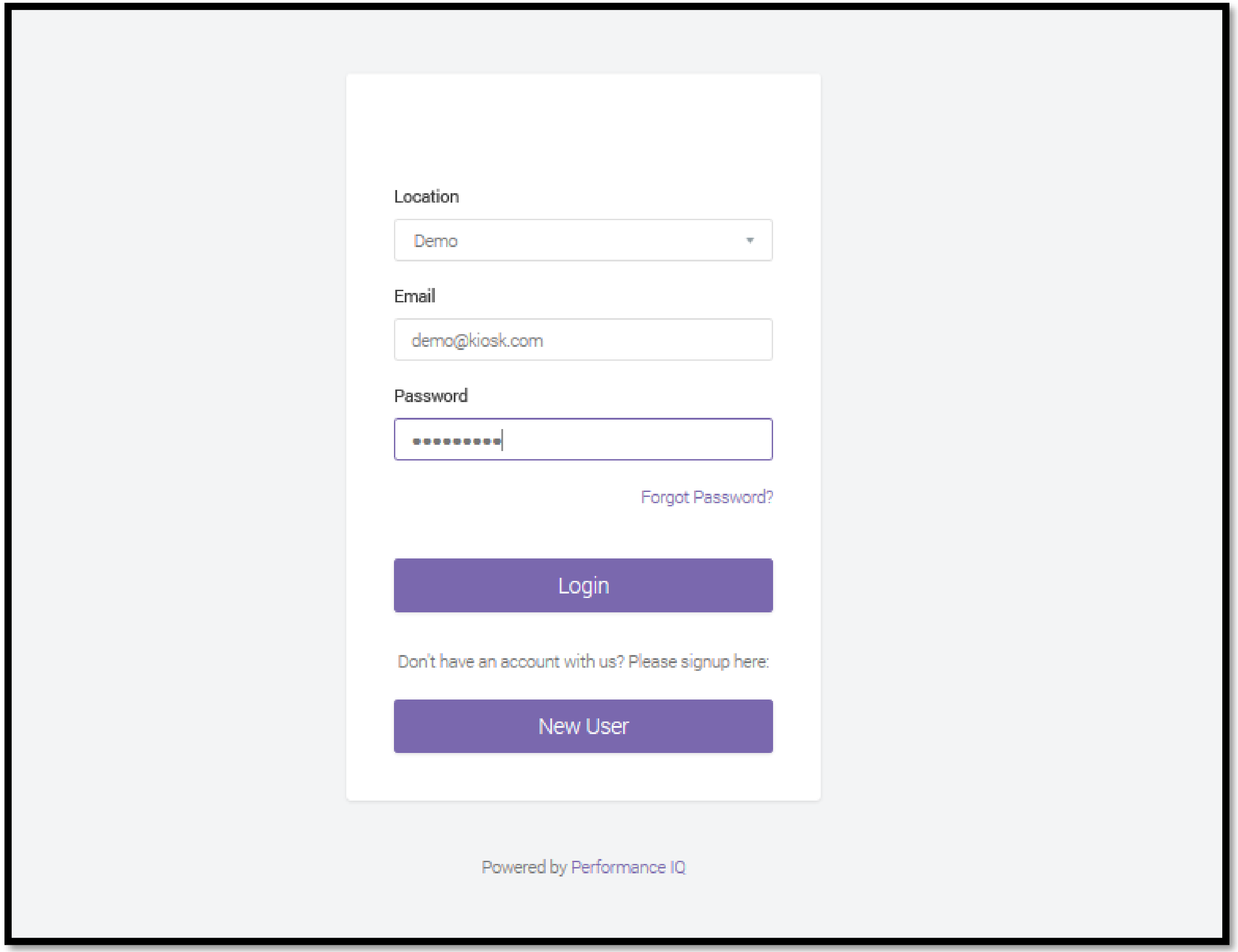
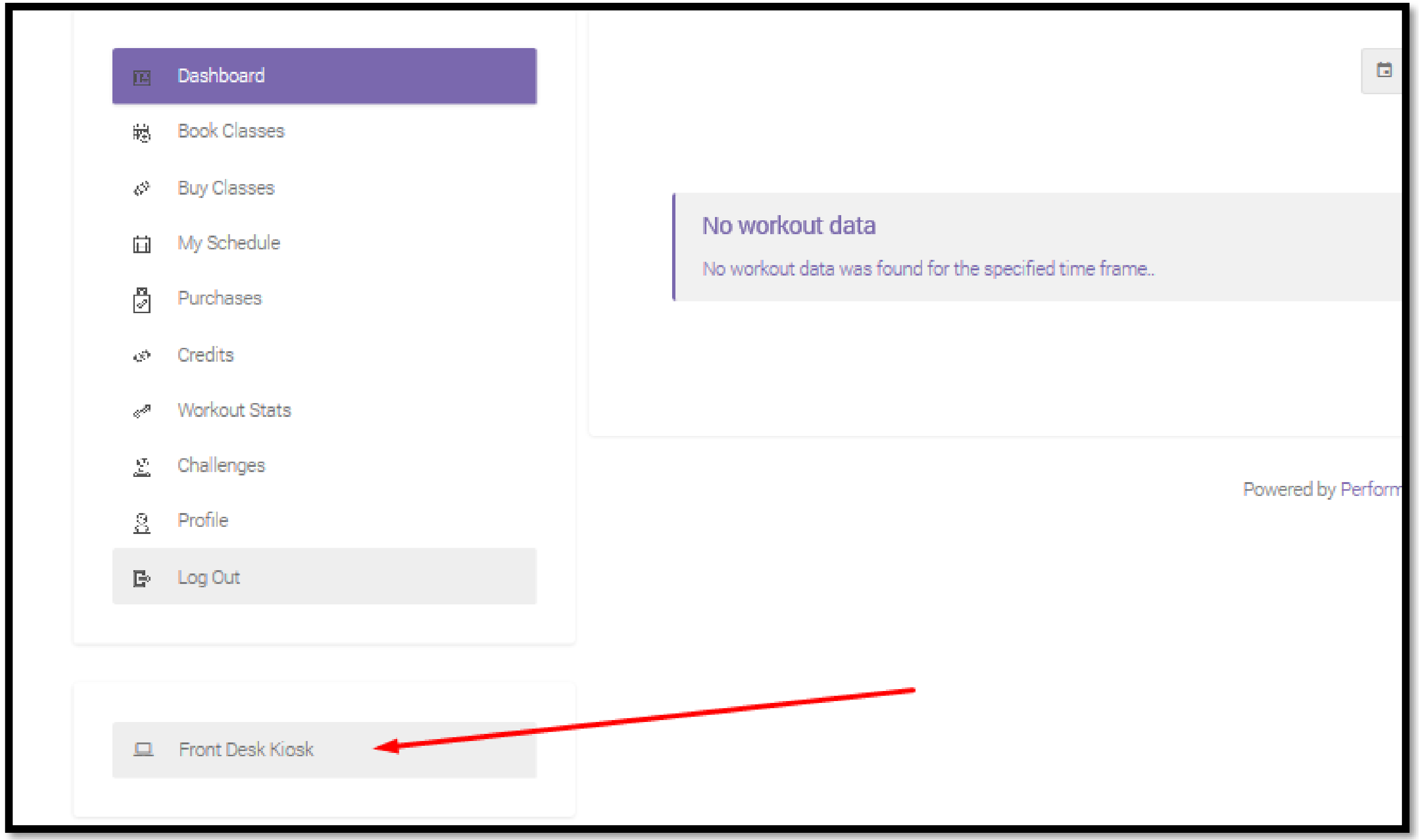
Logging In



Use the same login URL:
stretchmed.myperformanceiq.com

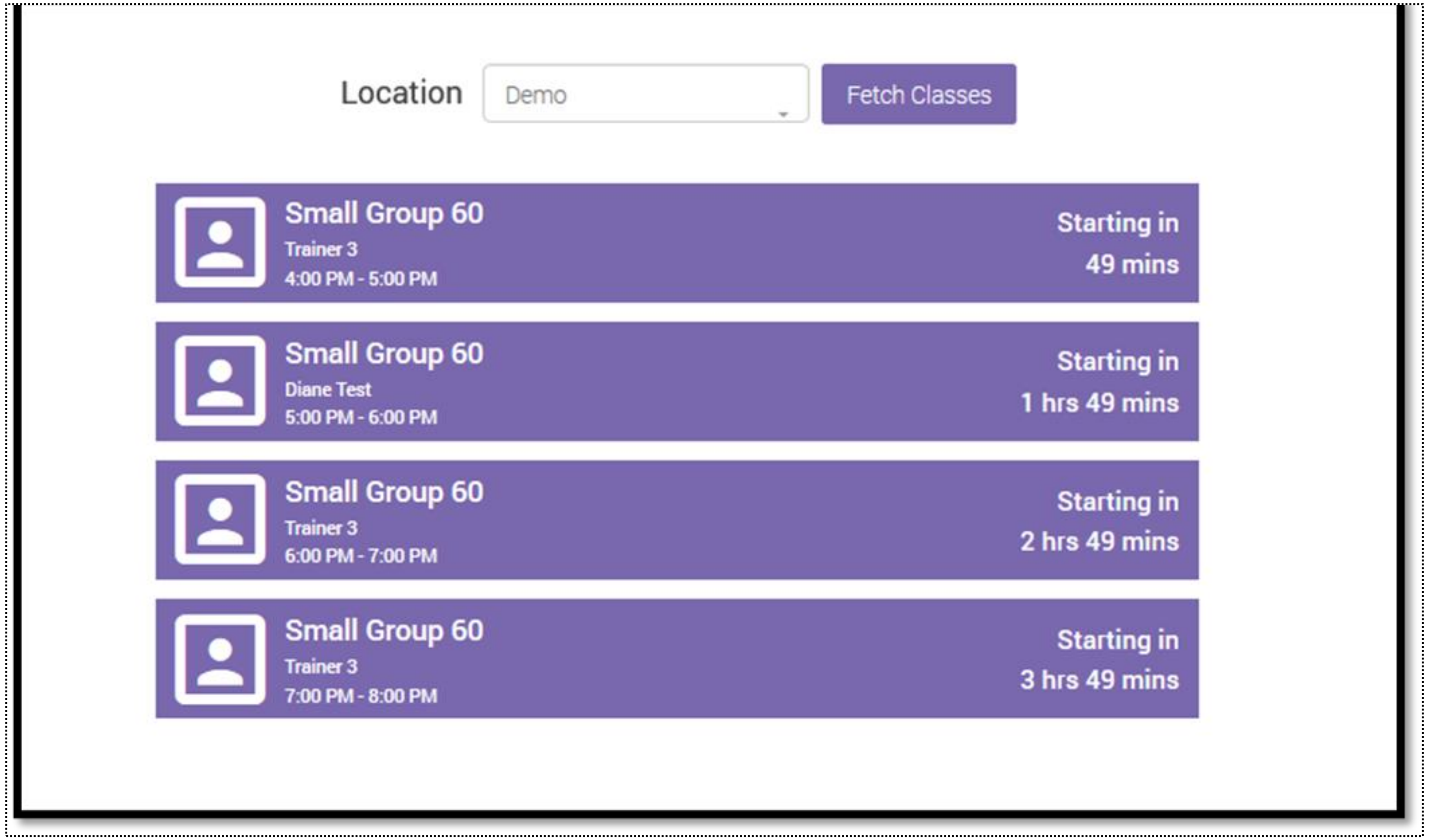
Each location will have their own kiosk login and will be sent upon request.

Logging In



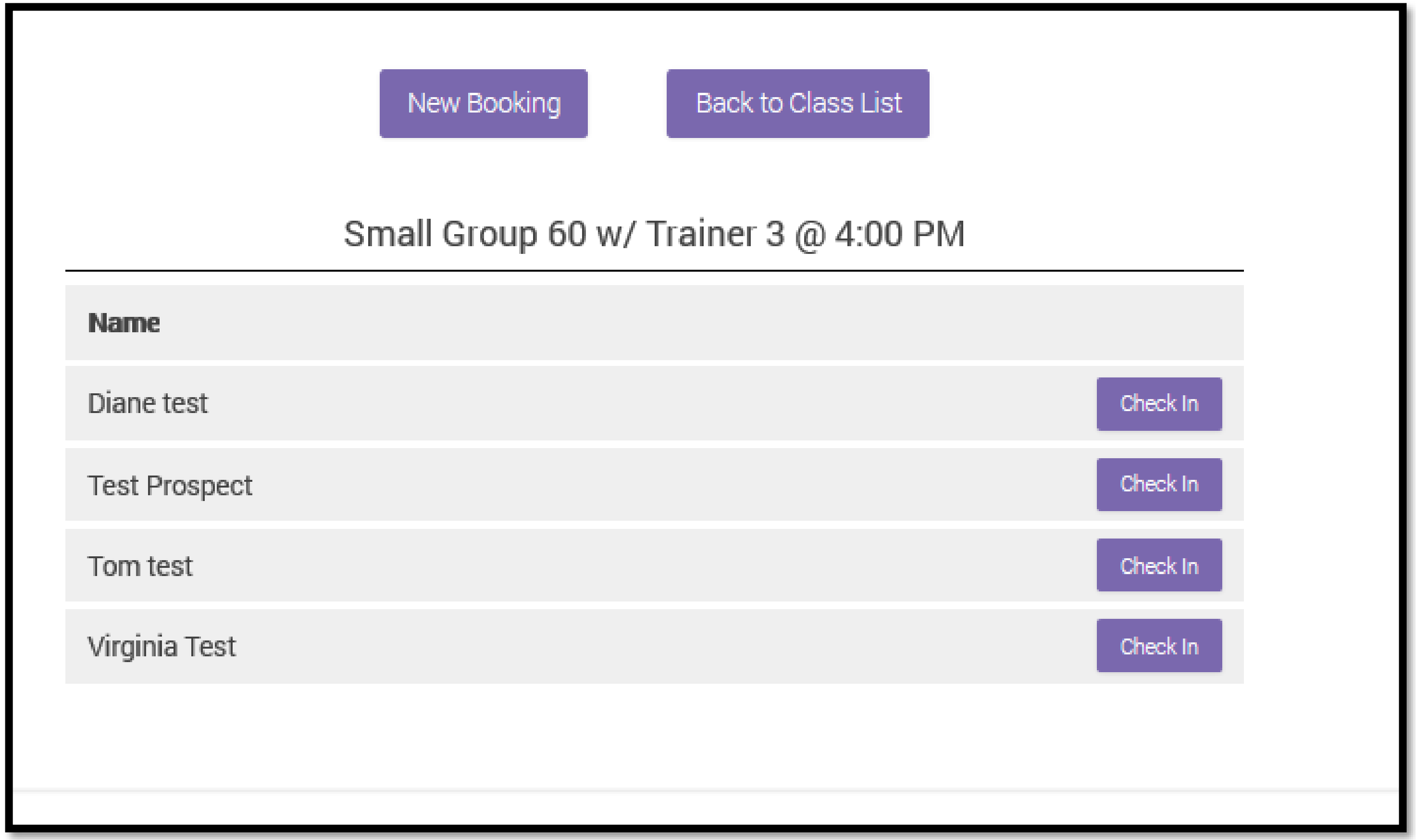
Once logged in, click **'Front Desk Kiosk'** in the lower left-hand corner.

Class List



The kiosk will show the current day's list of classes.

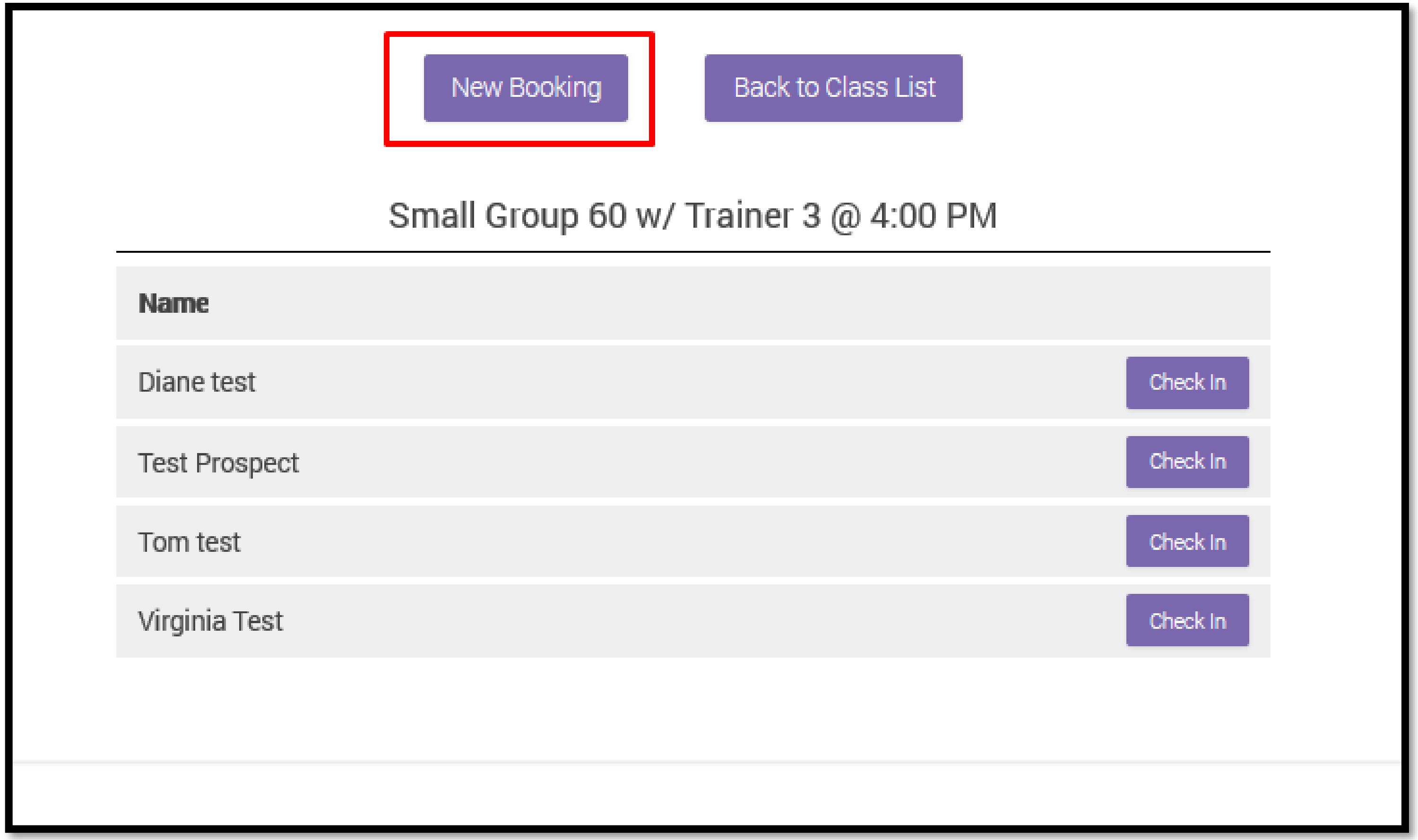
Checking In



When clicking on a class, the list of pre-booked attendees will appear.

Click the **'Check in'** button next to the attendee's name to check in to class (will be marked as a 'Show' in ClubReady).

New Booking



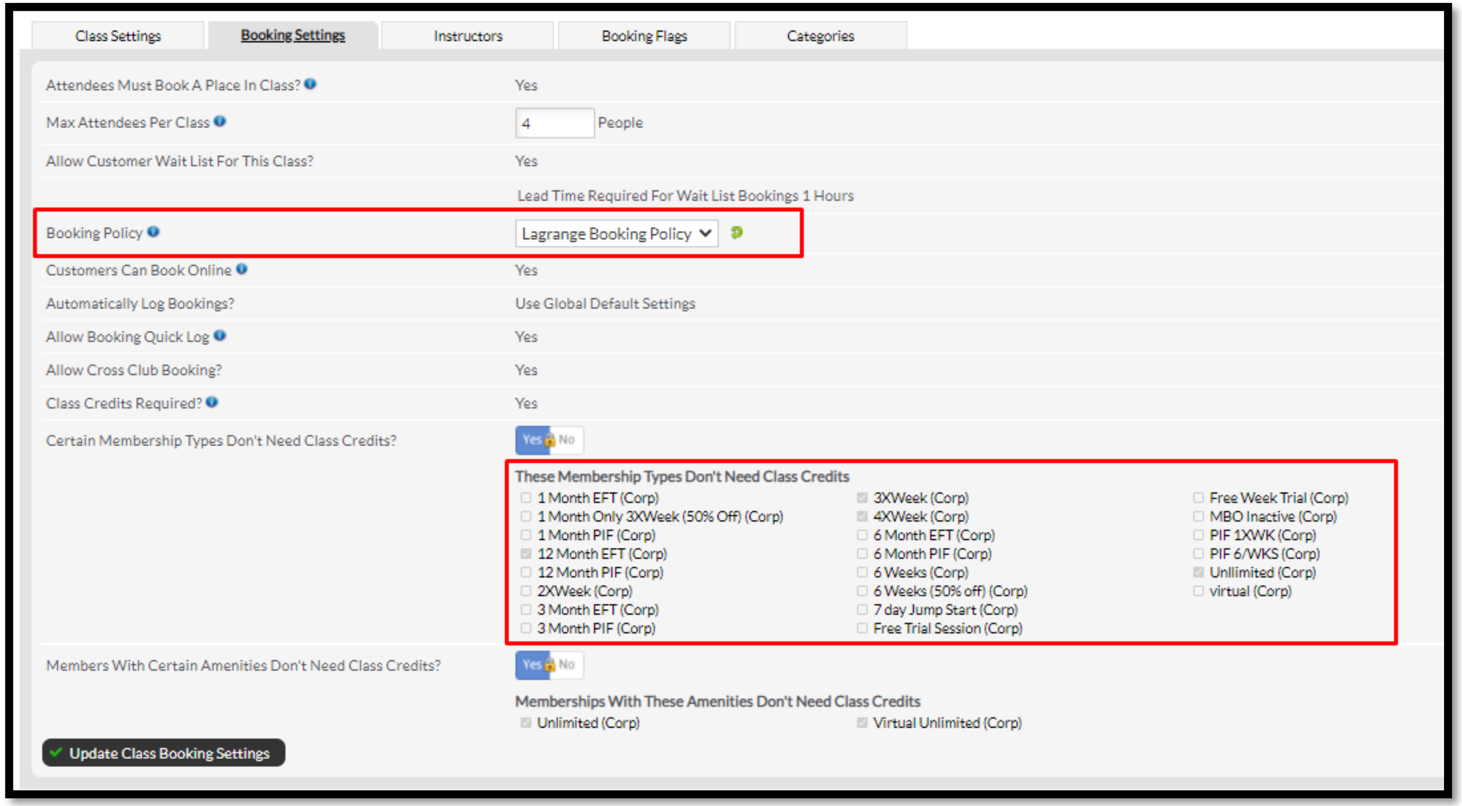
A new booking can be added through the kiosk by selecting the ‘New Booking’ button.

The user must already have an account in the system.

You will search the user by the phone number on their account and add them to the class.

PIQ Helpful Tips

Class Type Setup > Booking Settings



Setup > Scheduling > Classes/Group > Booking Settings

Check these class type settings:

- Booking Policy
- Membership Types That Don't Need Class Credits

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Booking Policy

View Booking Policy

Policy Name
Booking Policy

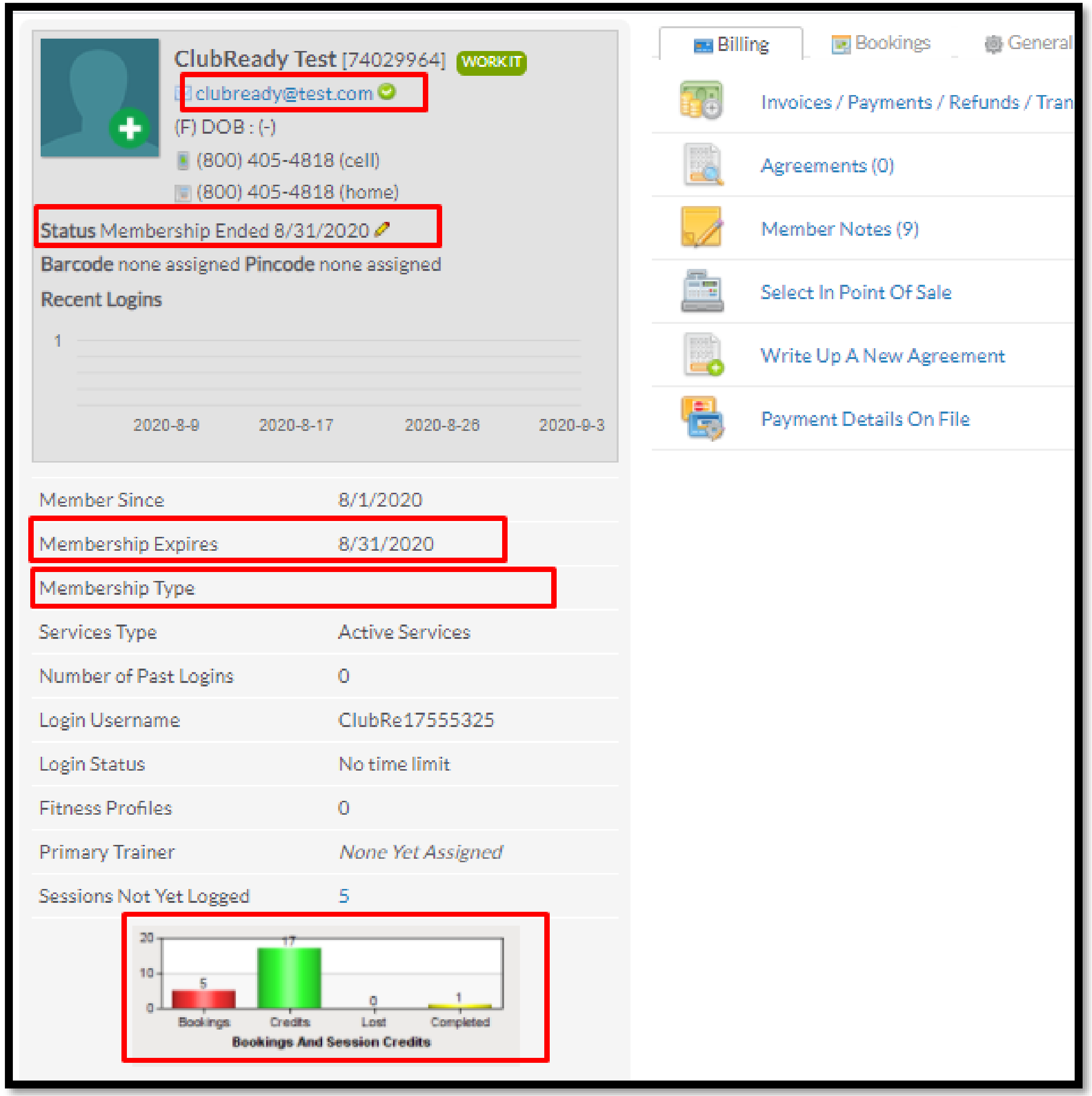
How Much Lead Time Is Required To Make A New Booking?	0 Hrs
How Far Out Can A Customer Make A Booking?	8 Days
How Long Before A Session Starts Can A Customer Cancel Online And Avoid Billing?	8 Hrs
How Long Before A Session Starts Can A Customer Still Reschedule Online?	8 Hrs

Cancellation Policy Description:
You may cancel your scheduled appointment 8 hours prior to the scheduled time. If you cancel an appointment less than 8 hours before your scheduled time, or fail to cancel it, you will lose your session.

Setup > Scheduling > Booking Policy

Check the booking policy that is attached to the class in the class type settings and ensure the booking policy is not preventing a member from booking into a class.

All Detail Member Page



This view will quickly provide a snapshot of any potential issue as to why a user cannot book.

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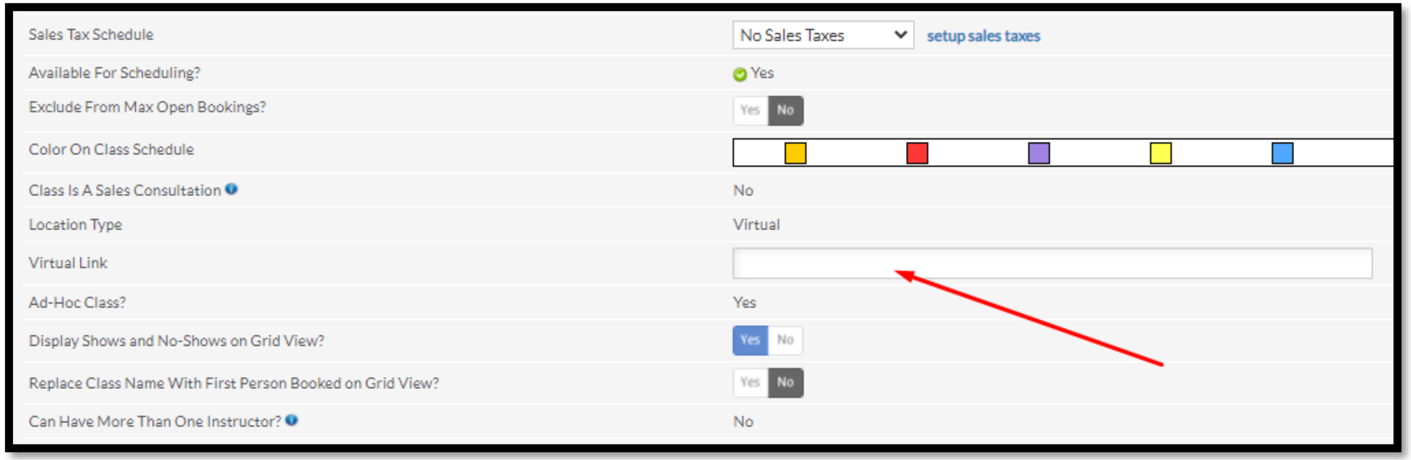
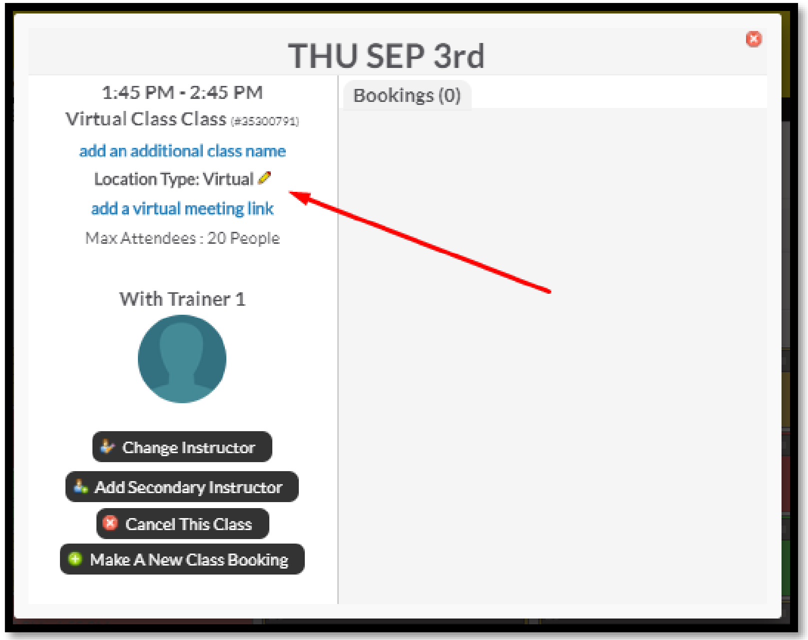
Setting Up Zoom in ClubReady





Navigate to the settings of the class type and select **'Virtual'** for the Location Type.

Then, enter the Zoom link. The link will be attached to any class of this type going forward.

You can also add the link, if needed, from clicking on the class in the monthly view of the class schedule.

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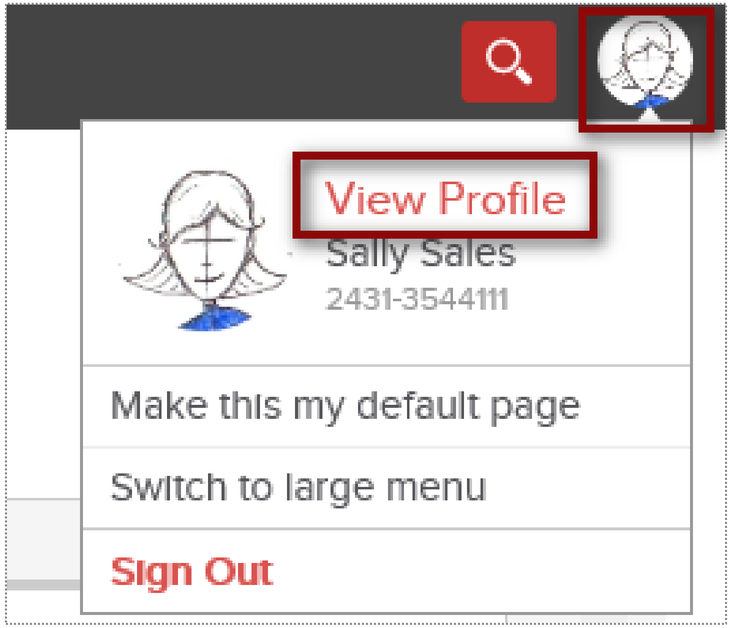
Knowledgebase Articles

- Virtual Meeting Links: https://www.clubready.com/wiki/WK38651337395
- Edit A Customer Profile (where to reset the user's password): https://www.clubready.com/wiki/WK26067540987
- Merge A Duplicate Profile: https://www.clubready.com/wiki/WK19128952393
- Delete A Member / Customer / Prospect: https://www.clubready.com/wiki/WK18327804136
- Enabling Sales Packages In P I Q / Custom Branded App: https://www.clubready.com/wiki/WK39908408736
- Leveraging Virtual Classes & Services In ClubReady: https://www.clubready.com/wiki/WK39057303563
- Create Booking Policies For Services And Classes: https://www.clubready.com/wiki/WK2339967002
- Creating A Room Layout: https://www.clubready.com/wiki/WK39824202471
- Assign a Membership Type: https://www.clubready.com/wiki/WK23729657038
- Edit Membership Status: https://www.clubready.com/wiki/WK23546050548
- Manually Add Session Credits: https://www.clubready.com/wiki/WK23347111511
- Creating a Booking Policy: https://www.clubready.com/wiki/WK2339967002

Staff Management

Your Login

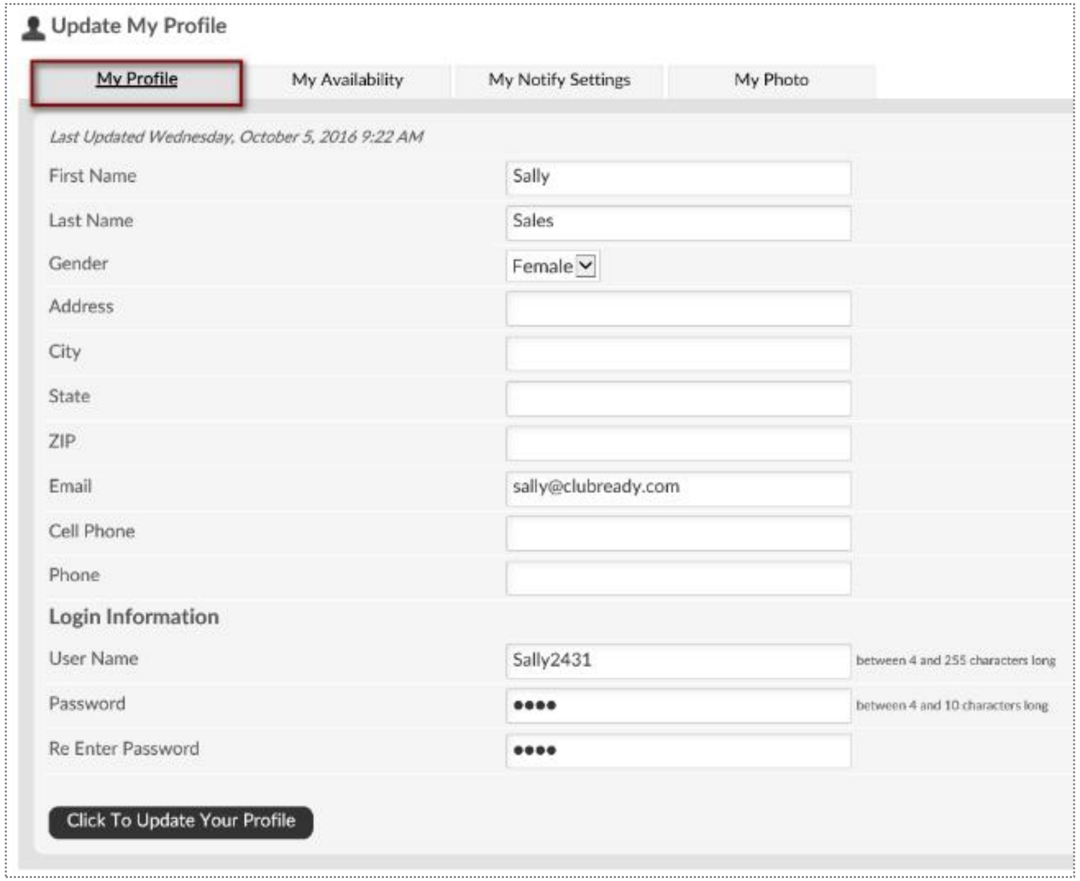
Updating your profile and availability



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

Your Login: Profile

Updating your profile and availability



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.

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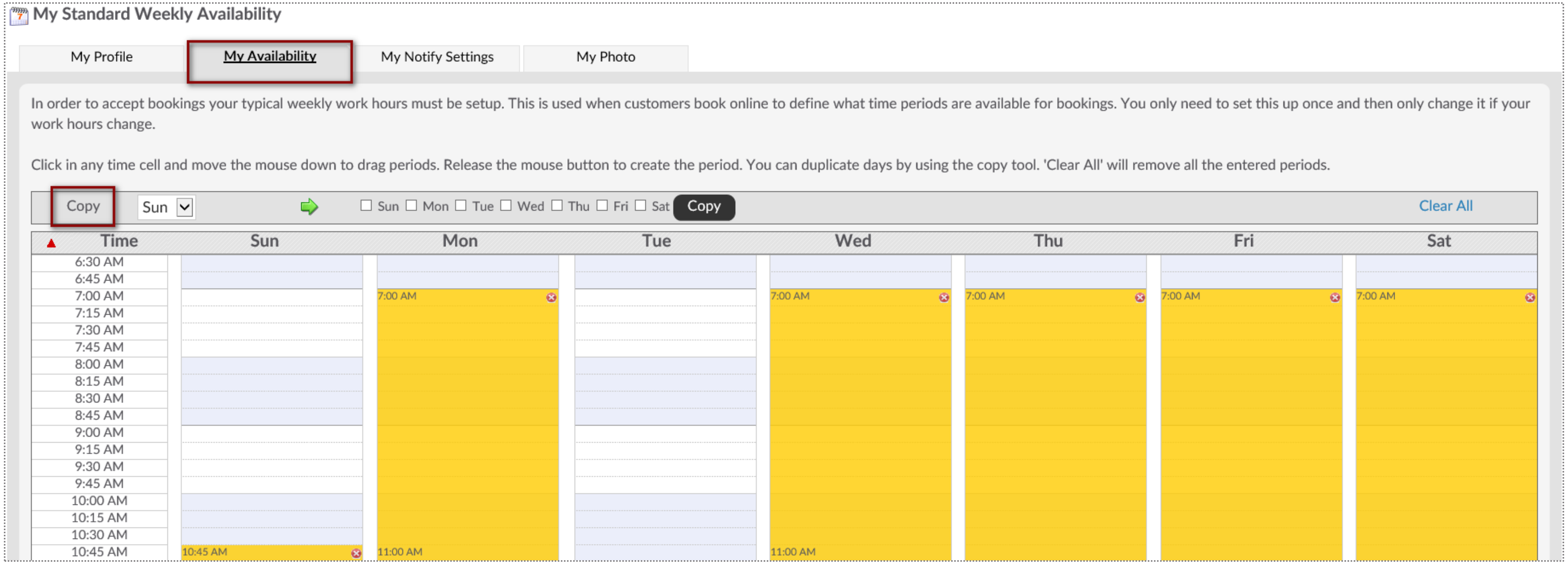
Your Login: Availability

Updating your profile and availability



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.

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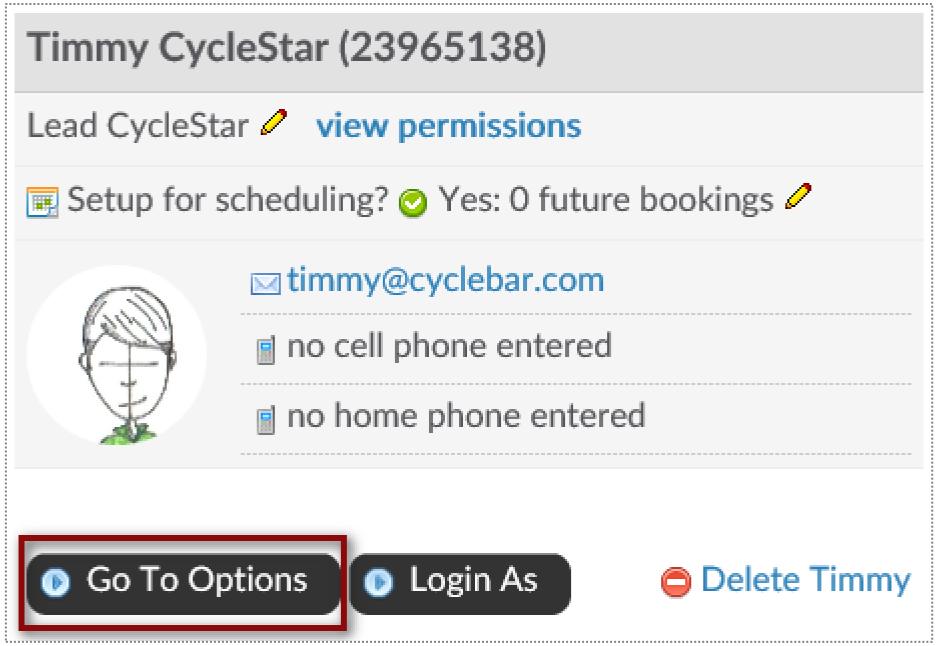
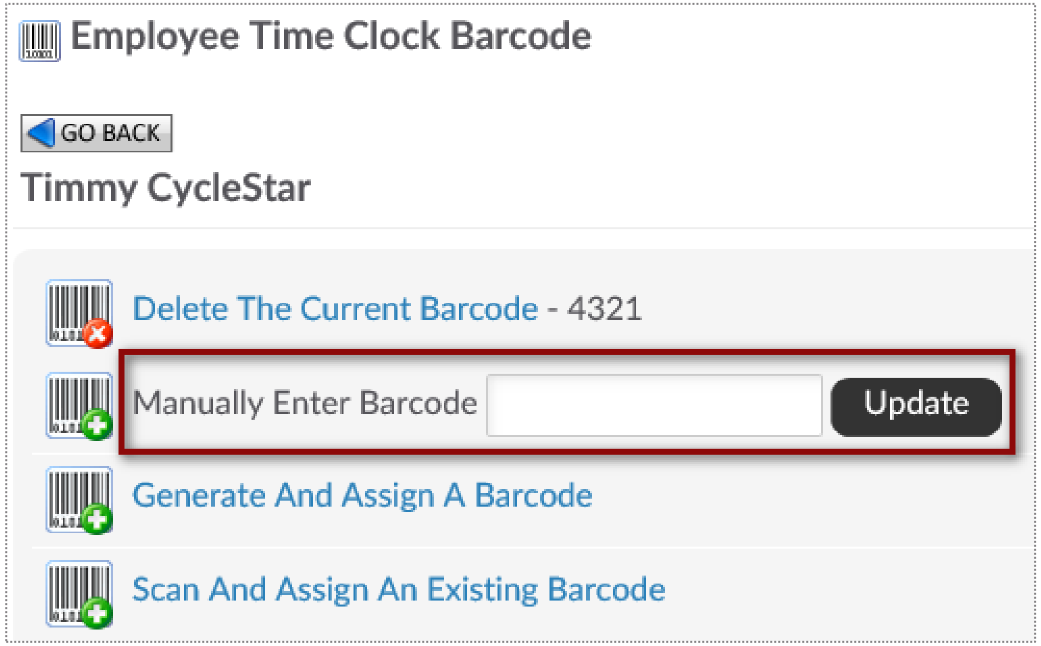
Setup Staff Clock In/Out Barcode

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

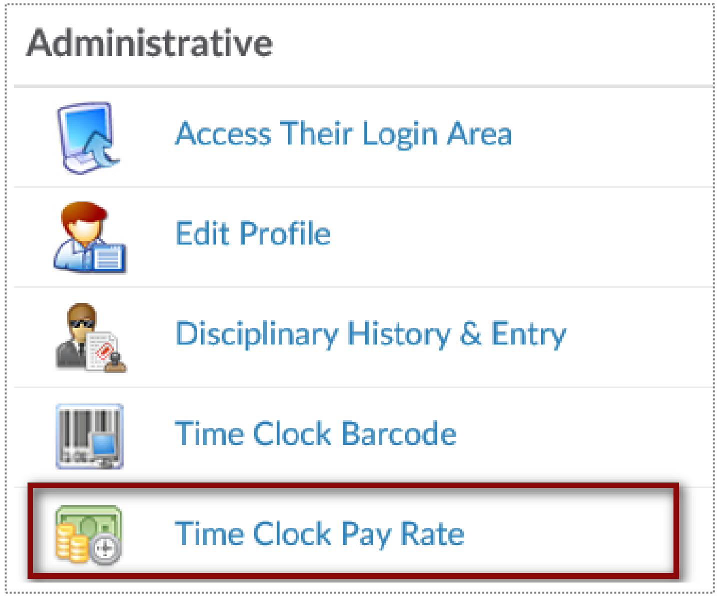




Employee must be assigned a barcode to keep track of their clocked hours. You can choose to **Manually Enter Barcode** for the staff. Any alpha numeric code that is more than 2 characters.

Setup Staff Hourly Pay Rate

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



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.**

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Check In Web Kiosk

Setup > General > Check In Web Kiosk

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.

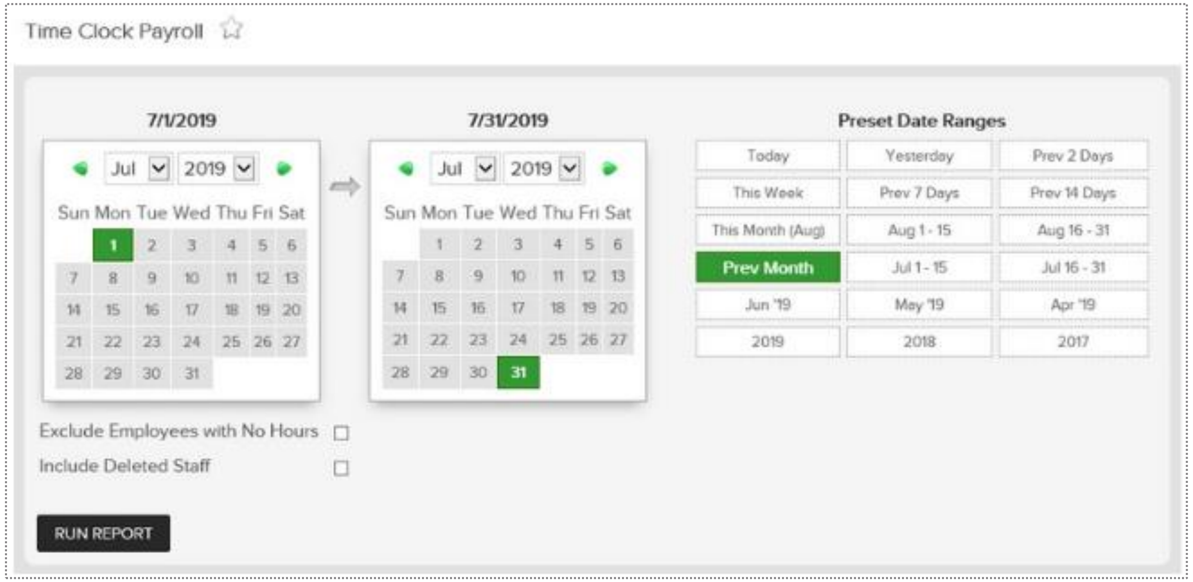
*The Check In Web Kiosk will only be used for staff to document their worked hours.

Staff Time Clock

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



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**.

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

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**.

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ClubReady

Training & Support

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

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Key Reports

Learn > Knowledge

Complete Guide To Product Reports:

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

Complete Guide To Communication Reports:

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

Complete Guide To Misc. Reports:

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

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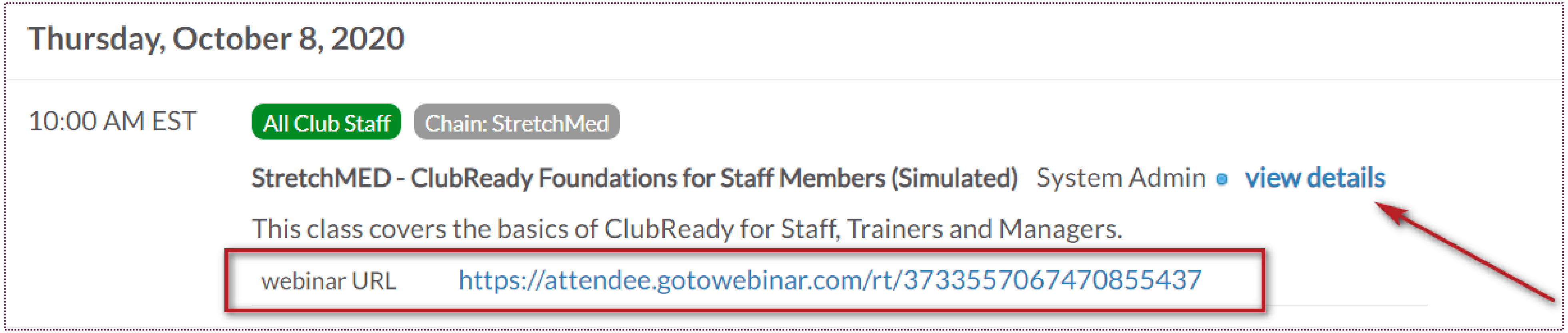
Training: ClubReady Foundations Webinar

Learn > Training



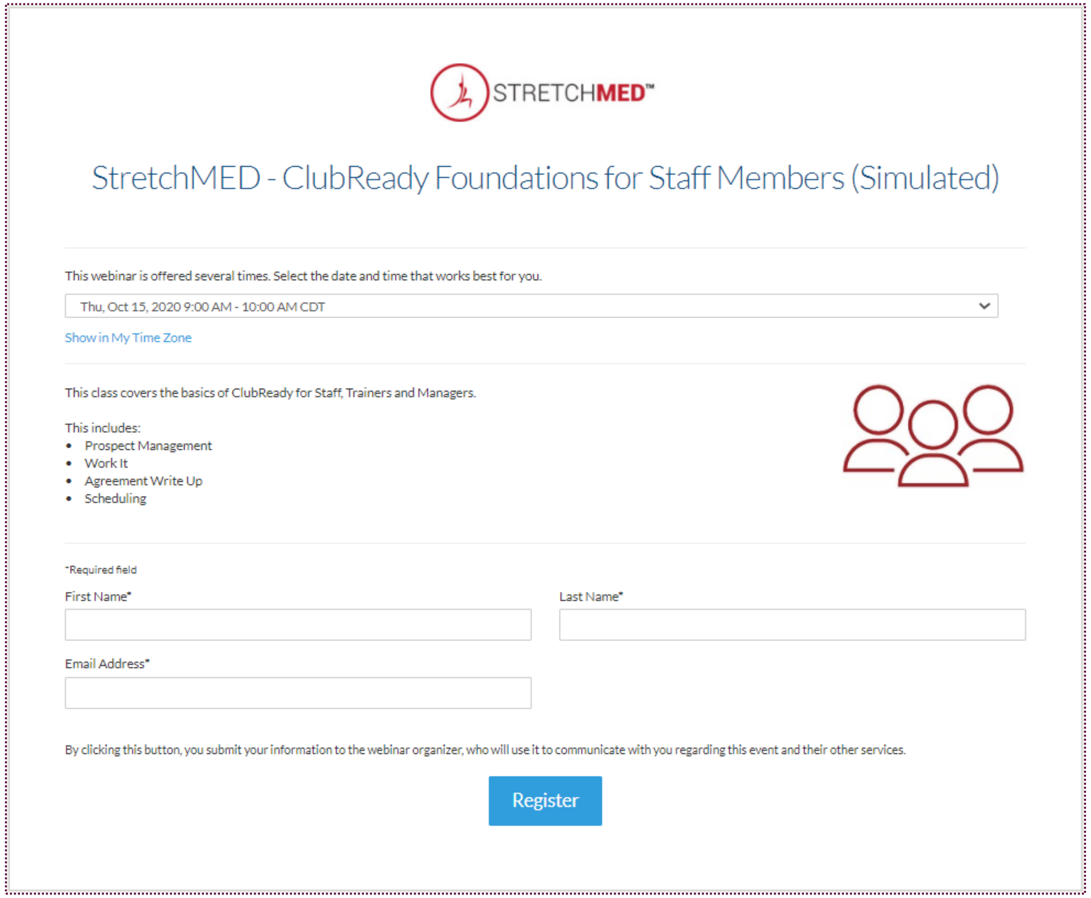
Click the links below to register and join our available custom webinars for StretchMED:

StretchMED - ClubReady Foundations for Owners / Admins (Simulated) - https://attendee.gotowebinar.com/rt/2623799090852275467

StretchMED - ClubReady Foundations for Staff Members (Simulated) - https://attendee.gotowebinar.com/rt/3733557067470855437

Training: ClubReady Foundations Webinar

Learn > Training

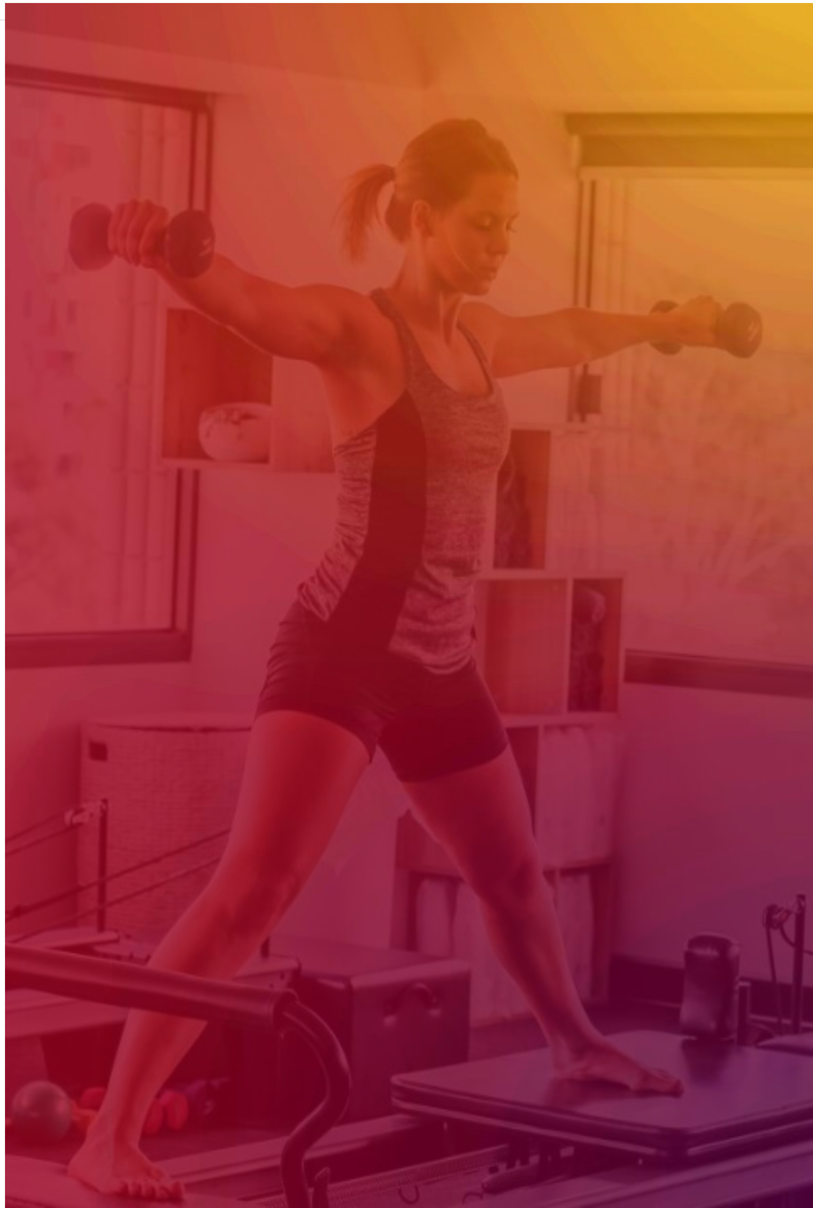


Complete the registration information and you will receive an email confirmation you have been registered to attend.

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/stretchmed-training



CRUniversity

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!

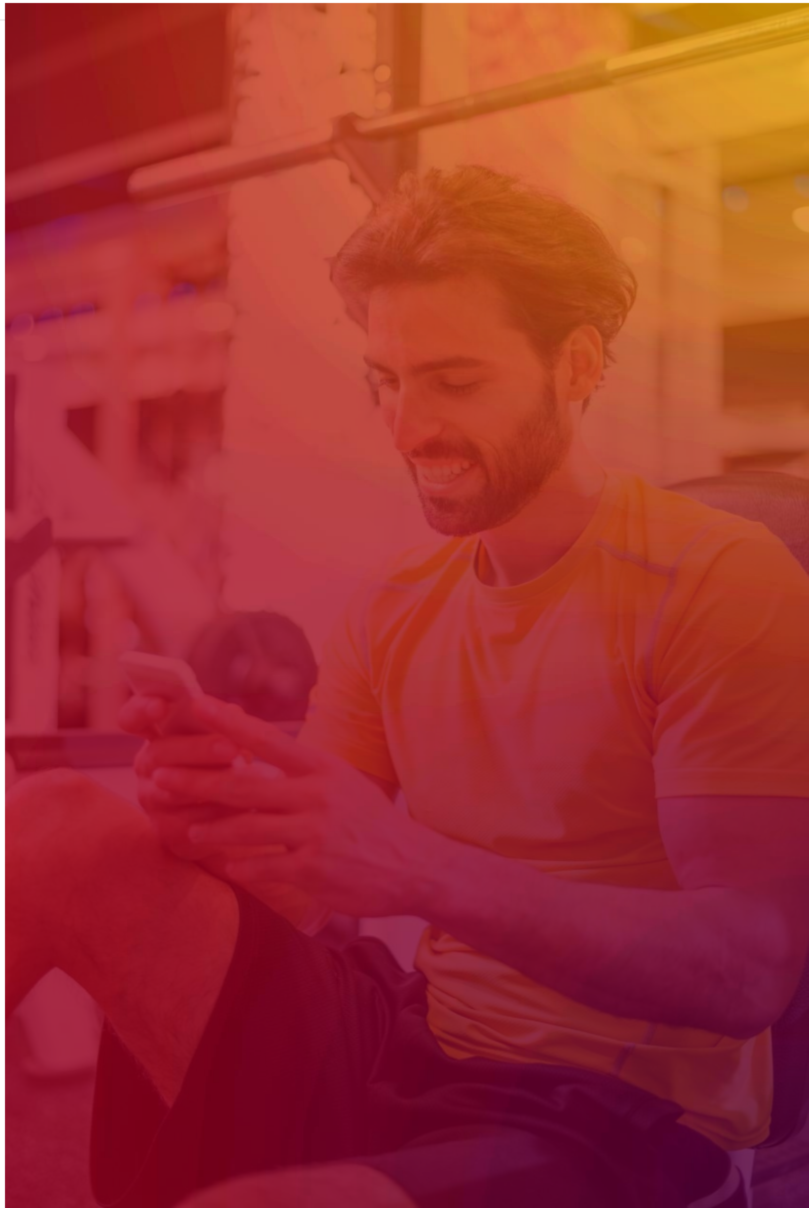
The following codes will automatically register you for the appropriate Foundations Learning Path:

- For Owners and Admins, enter the code: **StretchMEDOwner**
- For Staff Members, enter the code: **StretchMEDStaff**

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/

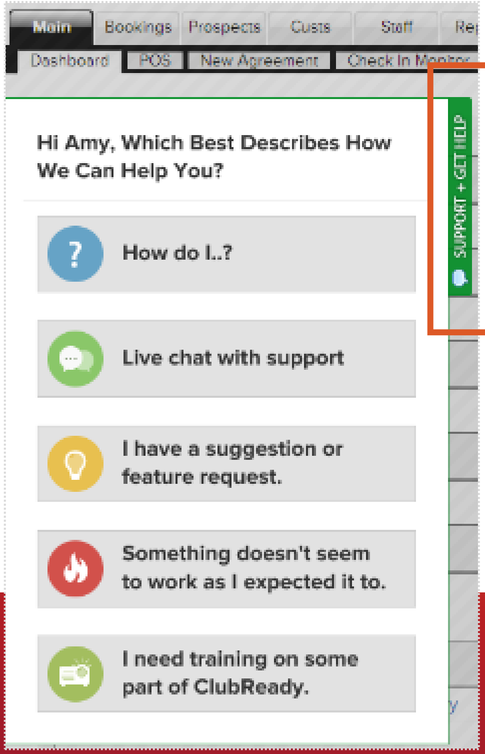
You will then receive an email that creates your login and password at https://cruniversity.litmos.com

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.



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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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**

ClubReady