



# StretchMED ClubReady Foundations

User Guide

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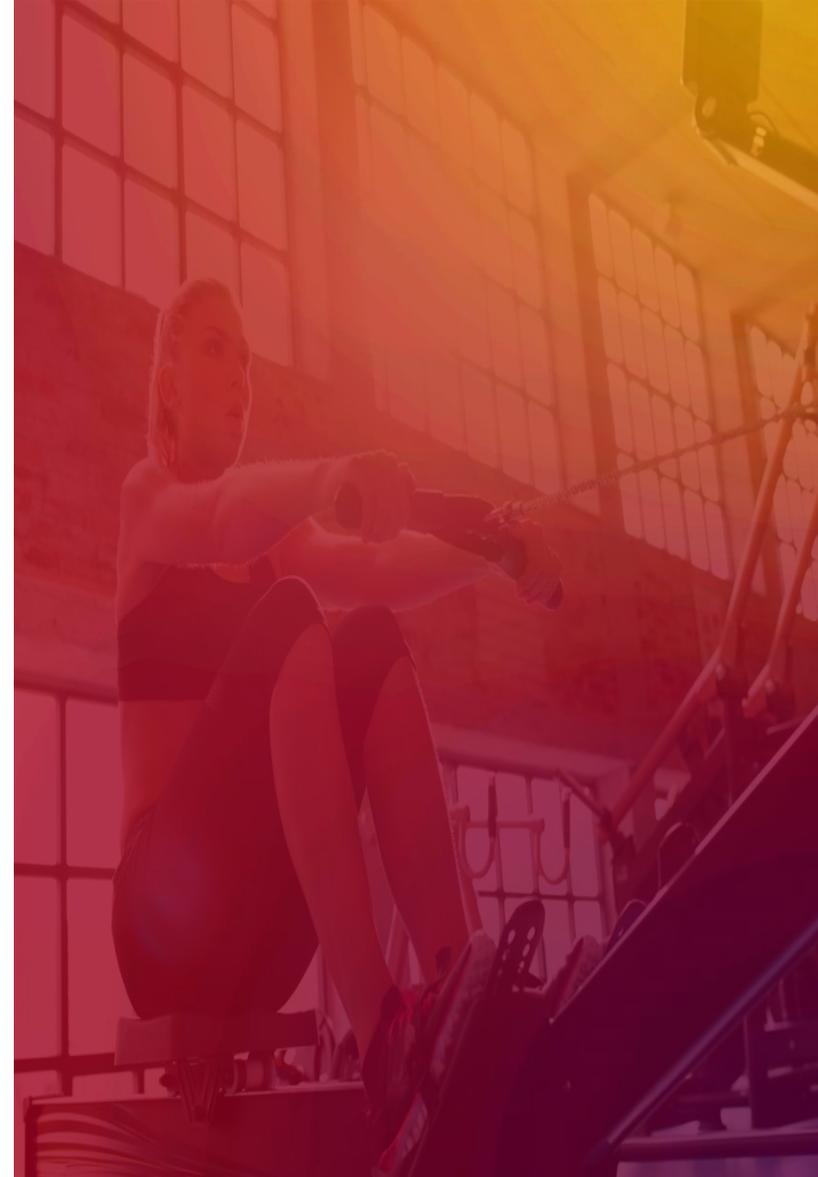
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# Recommended Hardware

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

After the units have been received and setup in place please email [support@clubready.com](mailto:support@clubready.com) to schedule a remote computer setup session.

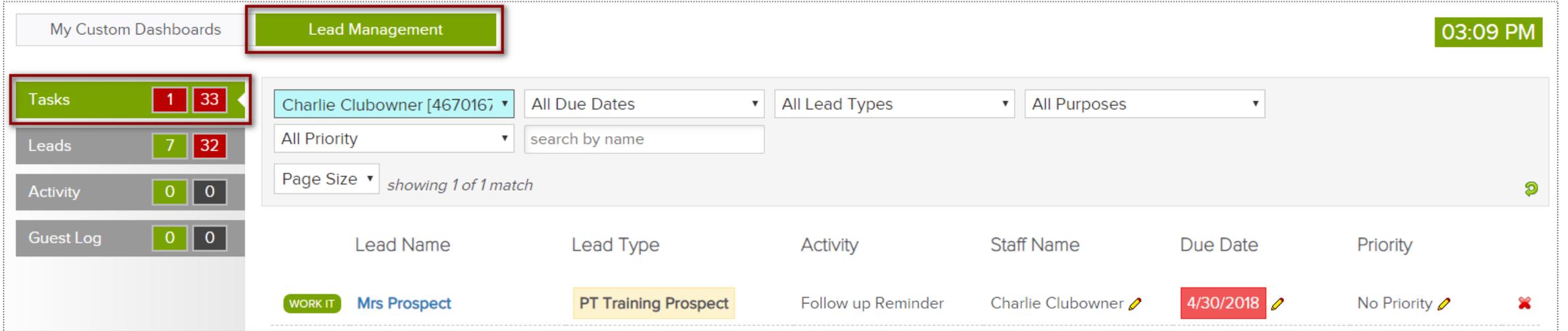




# Lead Management Dashboard

# 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
<b>WORK IT</b> 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 Assigned

No Sales Contacted Filter All Contact Methods search by name Unassigned

Page Size showing 7 of 7 matches

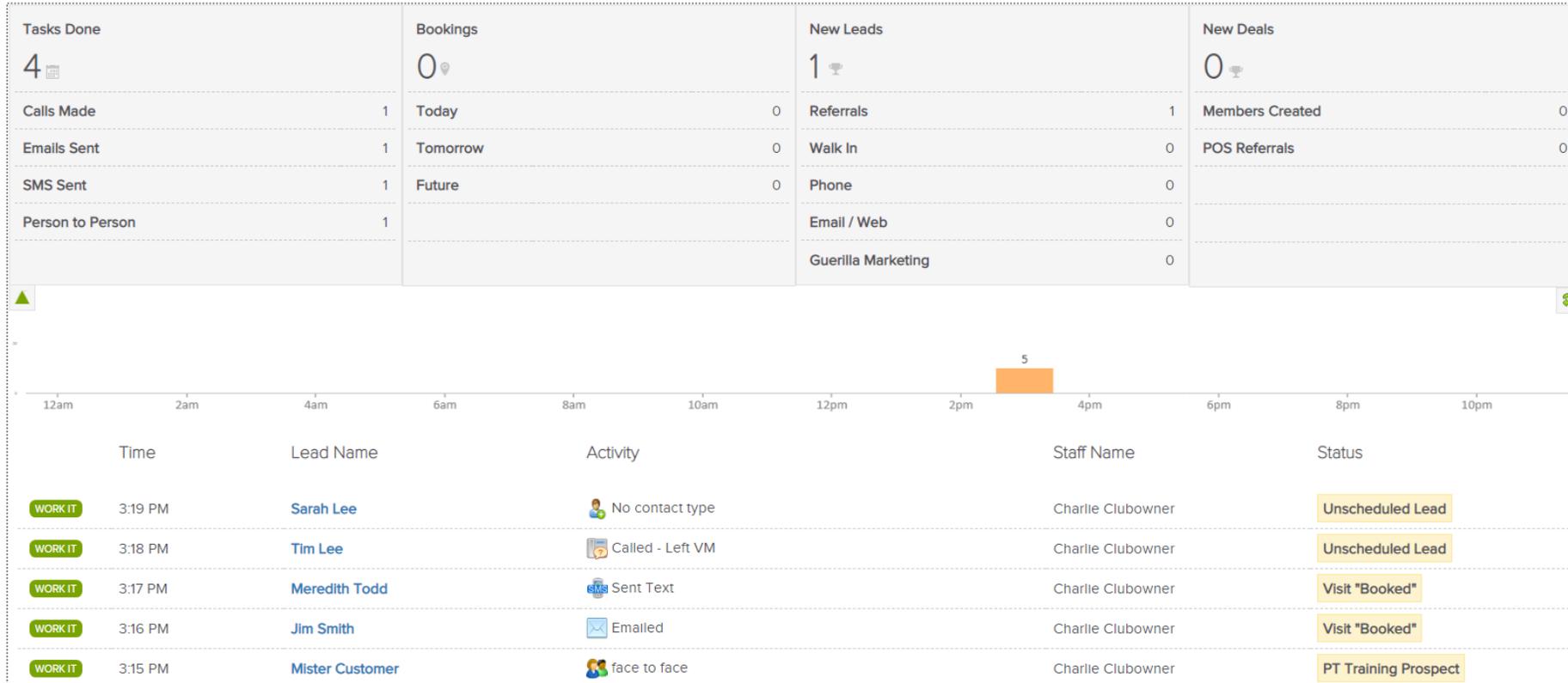
Lead Name	Lead Type	Referral Type	Contact Method	Entry Time	Contacts
<b>WORK IT</b> Jason Smith	Unscheduled Lead	Flyer	Telephone Inquiry	Added 4 days ago	✓ 1 contact
<b>WORK IT</b> Jon Martin	Visit "Booked"	Instagram	Telephone Inquiry	Added last month	✓ 1 contact

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

Appointments	Failed Appointments	Guests	Units Sold
1  6 tomorrow	1	1	0
First Appointment: 1	Cancelled: 0	Walk In: 0	First Visit Sold: 0
Additional Appointments: 0	No Show: 1	Appt Show: 1	Be-Back Sold: 0
Rescheduled: 0			

12am 2am 4am 6am 8am 10am 12pm 2pm 4pm 6pm 8pm 10pm

Booking Information	Customer	Status
10:30 AM - 11:30 AM min with Jane Doe #70070823	<b>Tom Jenkins</b> <span>WORK IT</span> cell : (310) 555-9999 ⚠️ no completed e-waiver	<b>Inactive Member</b> Added 1 years ago Door hanger
10:30 AM - 11:30 AM min with Jane Doe #70070834	<b>Jill Jordan</b> <span>WORK IT</span> cell : (123) 456-6654 ⚠️ no completed e-waiver	<b>Inactive Member</b> Added last year

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

Appointments	Failed Appointments	Guests	Units Sold
1  6 tomorrow	1	1	0
First Appointment: 1	Cancelled: 0	Walk In: 0	First Visit Sold: 0
Additional Appointments: 0	No Show: 1	Appt Show: 1	Be-Back Sold: 0
Rescheduled: 0			

12am 2am 4am 6am 8am 10am 12pm 2pm 4pm 6pm 8pm 10pm

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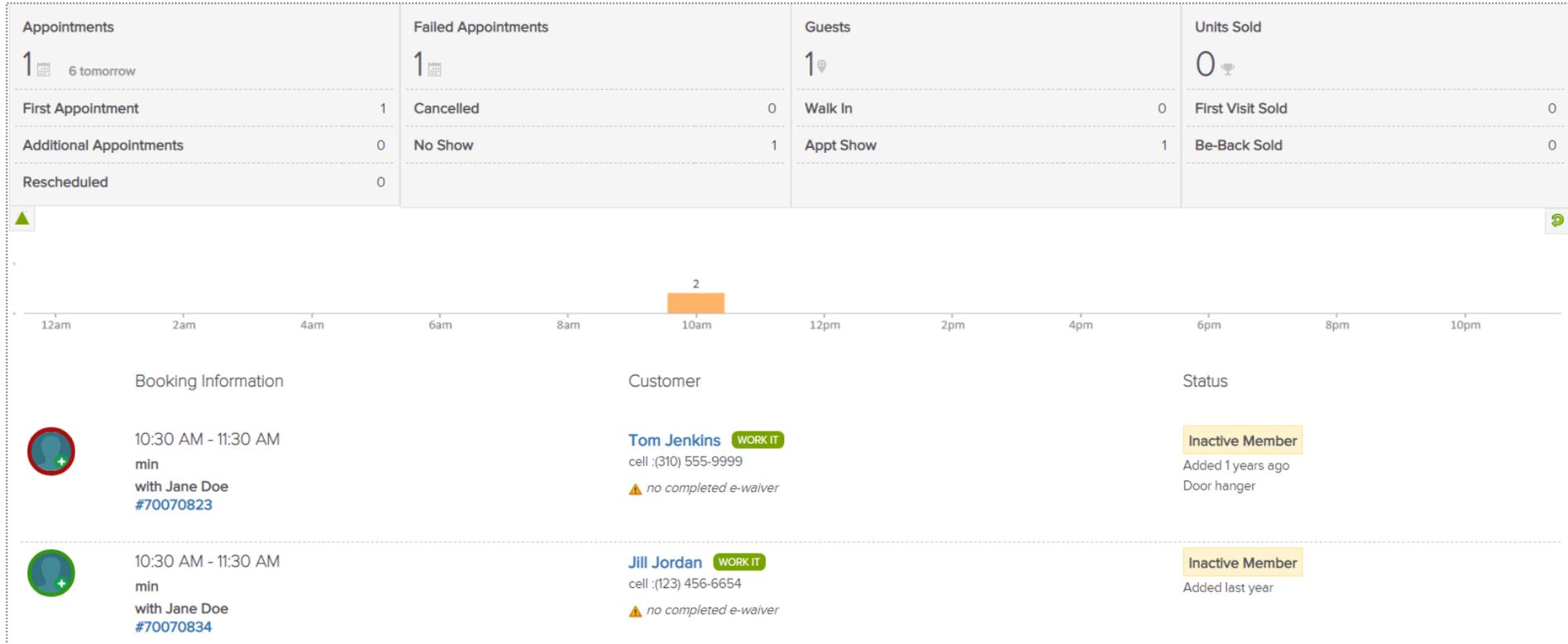
The **Guest Log** tab reflects guest information for a specific day. The report will display **Appointments, Failed Appointments, Guests** and **Units Sold**. A time bar lets you know when are these bookings happening throughout your club.





# 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.



# 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 <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"/> <small>start typing (at least 3 characters) to select from list</small>
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"/>
<input checked="" type="checkbox"/> Email Is Sent?	<input checked="" type="checkbox"/> Yes - New Prospect Email email template is used <a href="#">info about this</a>
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

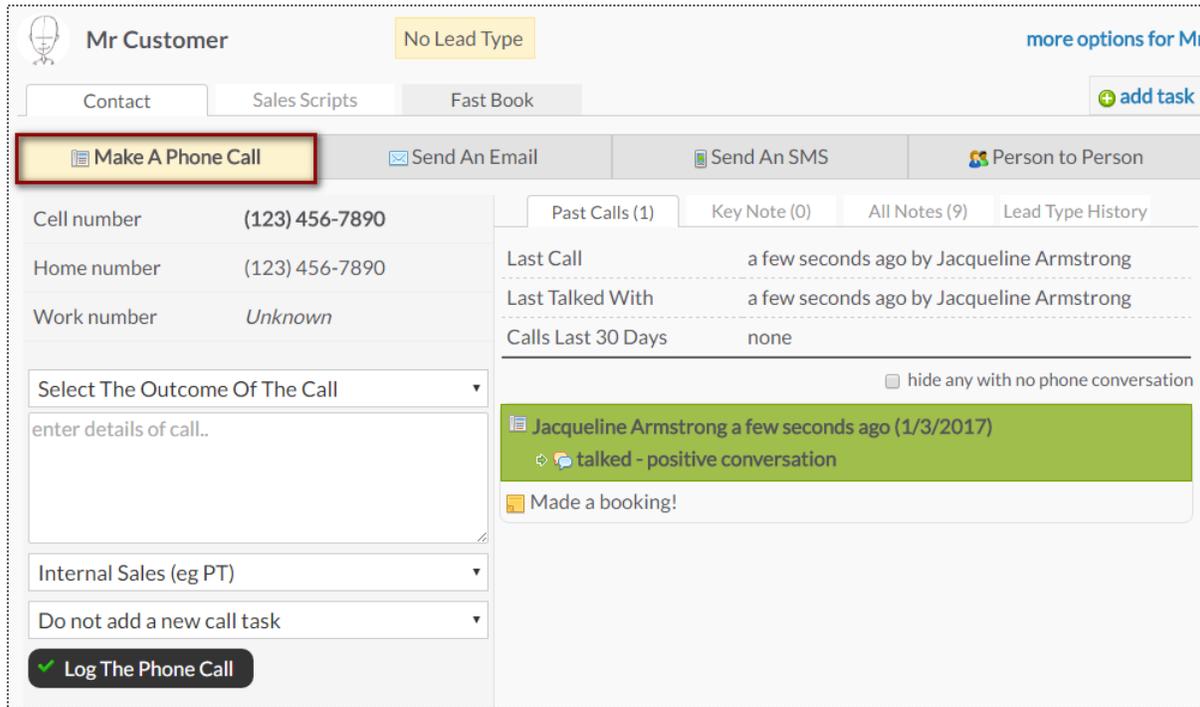
 **Tasks For Customers** Show all customer tasks  
click to filter tasks by team member assigned

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



The screenshot displays the 'Make A Phone Call' interface for a customer named 'Mr Customer'. The interface includes a header with the customer's name, a 'No Lead Type' label, and a 'more options for Mr' link. Below the header are tabs for 'Contact', 'Sales Scripts', and 'Fast Book', along with an 'add task' button. The main content area is divided into two columns. The left column contains contact information: Cell number (123) 456-7890, Home number (123) 456-7890, and Work number (Unknown). It also features a dropdown menu for 'Select The Outcome Of The Call', a text input field for 'enter details of call.', another dropdown for 'Internal Sales (eg PT)', and a dropdown for 'Do not add a new call task'. At the bottom of this column is a 'Log The Phone Call' button. The right column shows call history with tabs for 'Past Calls (1)', 'Key Note (0)', 'All Notes (9)', and 'Lead Type History'. It lists 'Last Call' and 'Last Talked With' as 'a few seconds ago by Jacqueline Armstrong', and 'Calls Last 30 Days' as 'none'. A checkbox for 'hide any with no phone conversation' is present. A call log entry for 'Jacqueline Armstrong a few seconds ago (1/3/2017)' is highlighted in green, with a note 'talked - positive conversation'. Below this is a note '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

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

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

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

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

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

enter details of call..

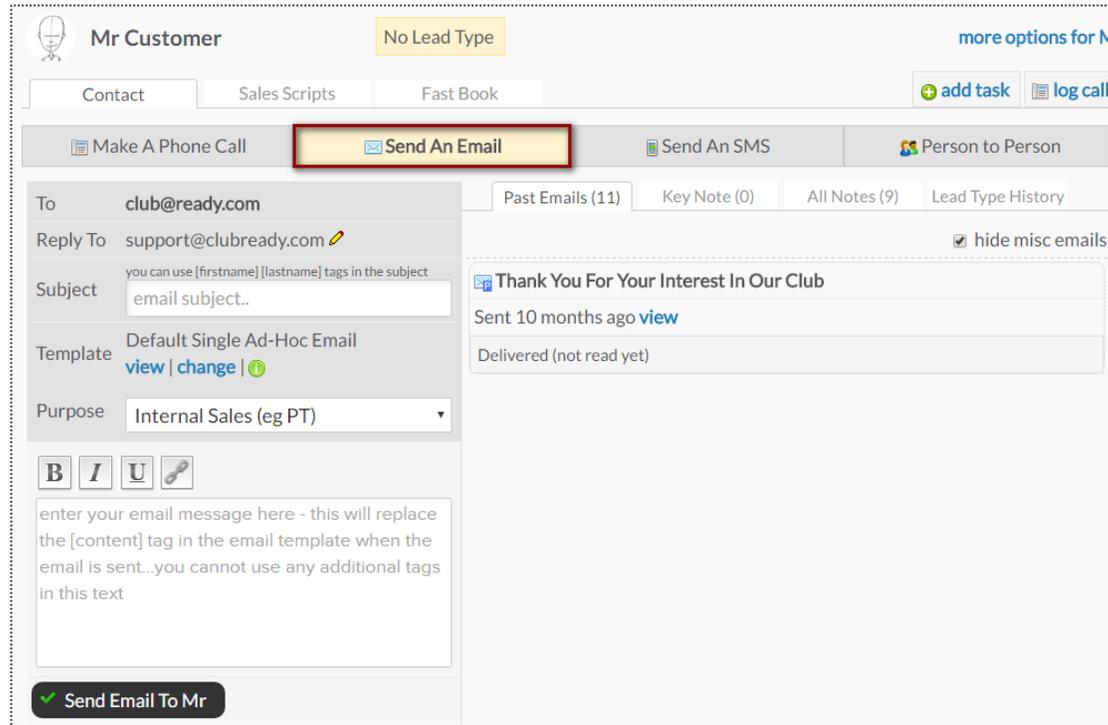
Internal Sales (eg PT)

Do not add a new call task

Log The Phone Call

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

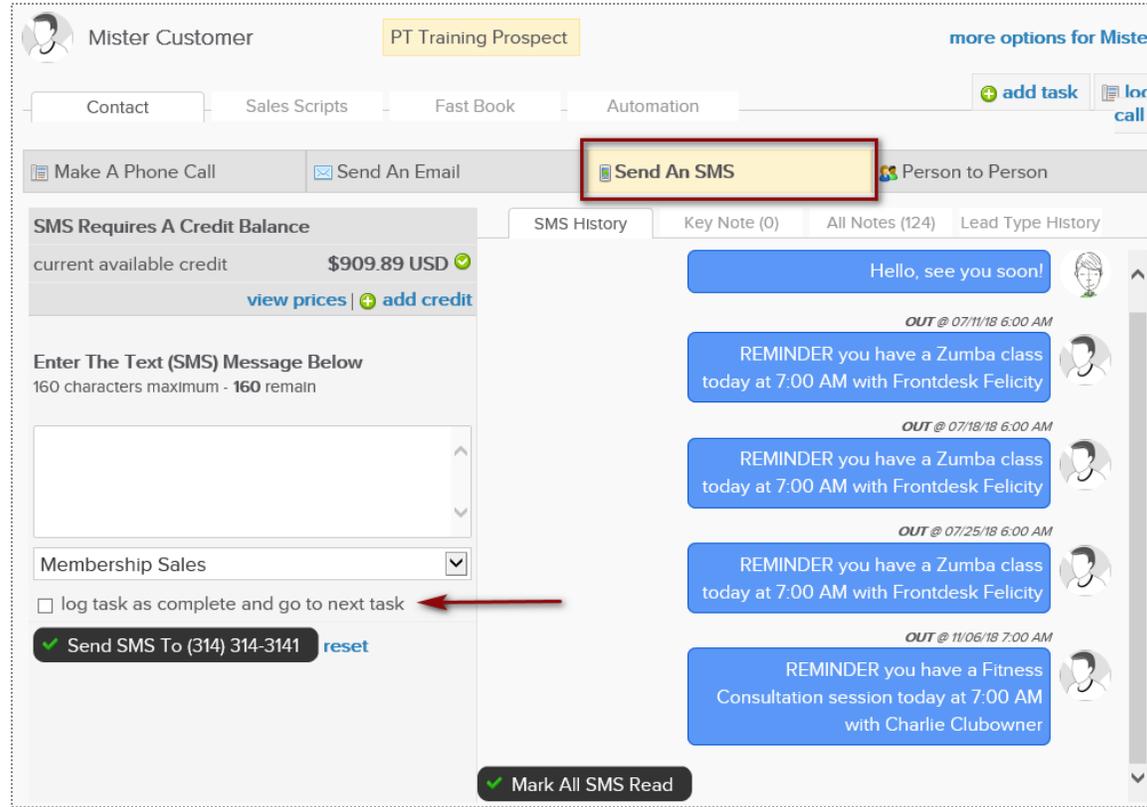
# Work It – Emails



The screenshot displays a CRM interface for a client named "Mr Customer" with "No Lead Type". The "Send An Email" tab is highlighted with a red box. The interface includes a header with navigation options like "Contact", "Sales Scripts", and "Fast Book", along with "add task" and "log call" buttons. Below the header, there are tabs for "Make A Phone Call", "Send An Email", "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" (with a placeholder for tags), "Template" (Default Single Ad-Hoc Email), and "Purpose" (Internal Sales (eg PT)). A rich text editor with bold, italic, and underline buttons is present, along with a "Send Email To Mr" button. On the right side, there is a history of email correspondence, including a "Thank You For Your Interest In Our Club" email sent 10 months ago, which has been delivered but not read yet.

The **Send An Email** tab allows you to make contact with the client through email. The right side of the screen will show a history of email correspondence between the client and staff member.

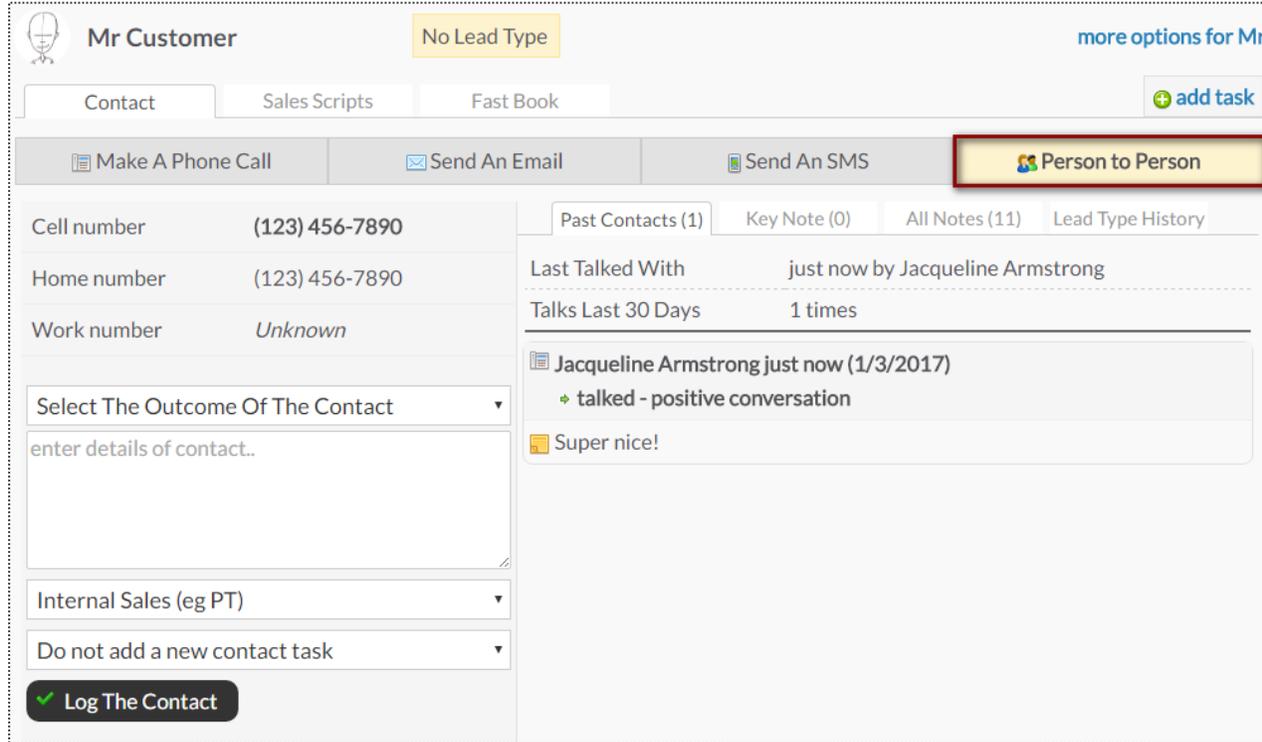
# Work It – SMS (Text Messages)



The screenshot displays the CRM interface for a client named "Mister Customer" (PT Training Prospect). The "Send An SMS" tab is highlighted with a red box. The interface includes a navigation bar with "Contact", "Sales Scripts", "Fast Book", and "Automation". Below this, there are buttons for "Make A Phone Call", "Send An Email", "Send An SMS", and "Person to Person". The "Send An SMS" section shows a credit balance of \$909.89 USD and a text input field with a character count of 160. A dropdown menu is set to "Membership Sales". A checkbox labeled "log task as complete and go to next task" is checked, with a red arrow pointing to it. The "Send SMS To (314) 314-3141" button is visible. The SMS history on the right shows several messages, including a "Hello, see you soon!" message and multiple "REMINDER you have a Zumba class today at 7:00 AM with Frontdesk Felicity" messages. A "Mark All SMS Read" button is at the bottom.

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 the 'Person to Person' interface for a contact named 'Mr Customer'. The contact's information is shown on the left, including cell, home, and work numbers. The right side features a chronological list of interactions, such as a recent conversation with Jacqueline Armstrong. A red box highlights the 'Person to Person' tab in the top navigation bar.

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

**Person to Person** (highlighted)

Interactions:

- 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 – 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](#)

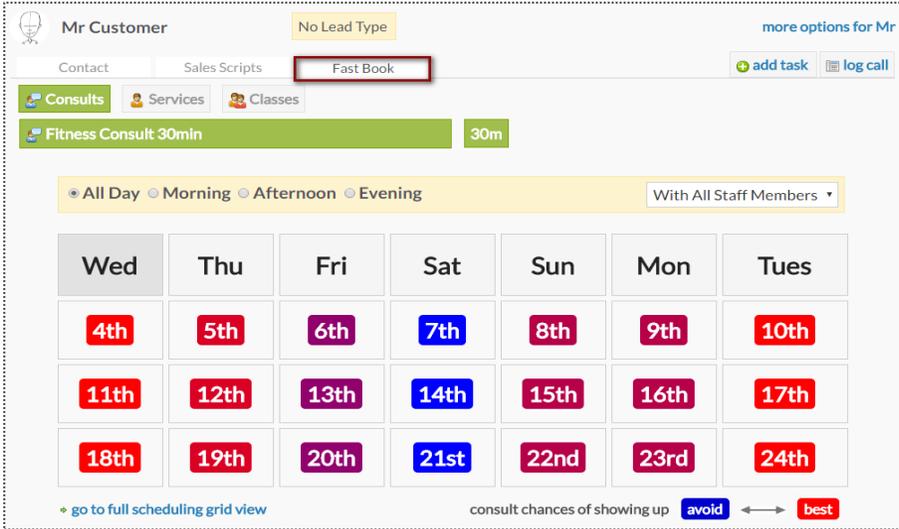
Contact Sales Scripts **Fast Book** [+ add task](#) [log call](#)

**Consults**  Services  Classes

 Main Event	60m <sup>0</sup>	
 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

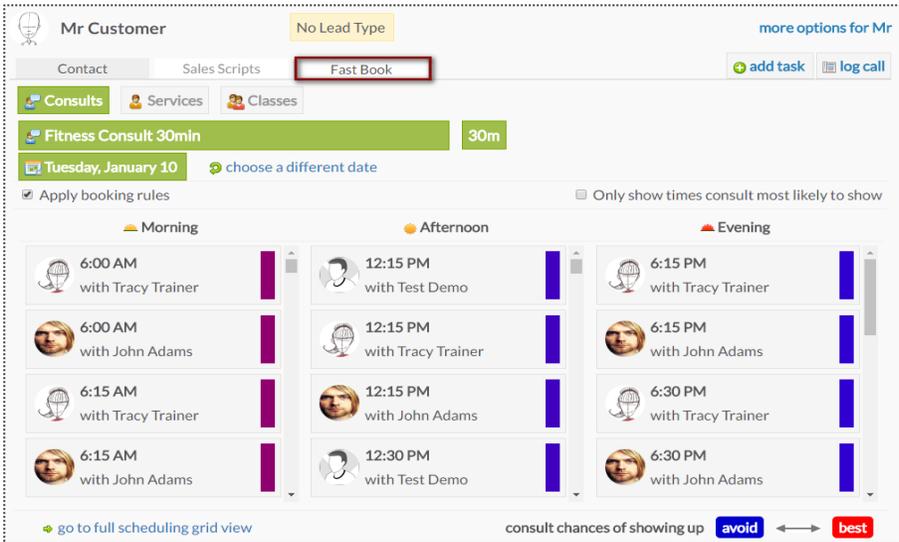
Fitness Consult 30min | 30m

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

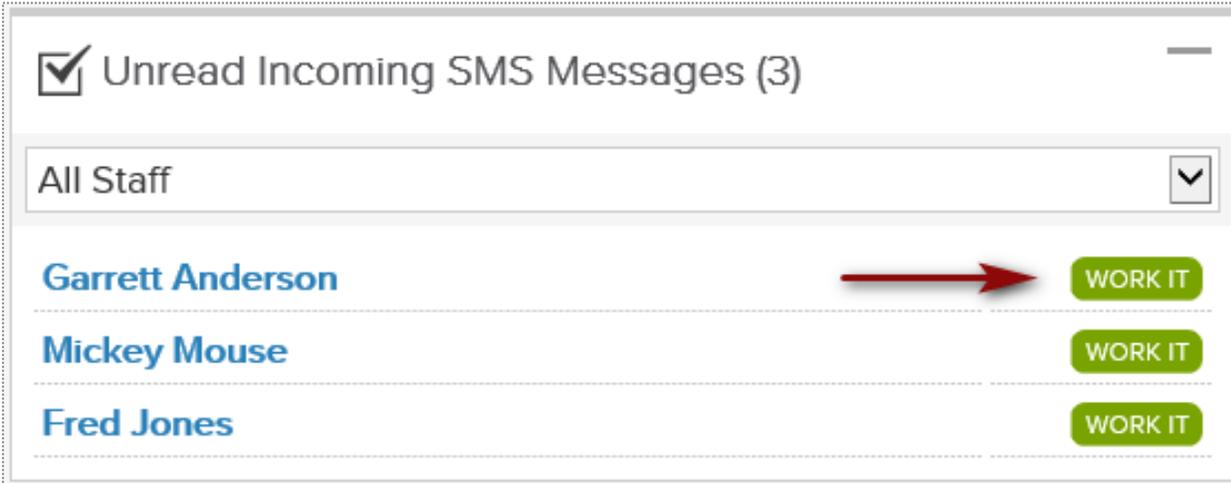
Apply booking rules |  Only show times consult most likely to show

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

# Widget – Unread Incoming SMS

Main > Dashboard



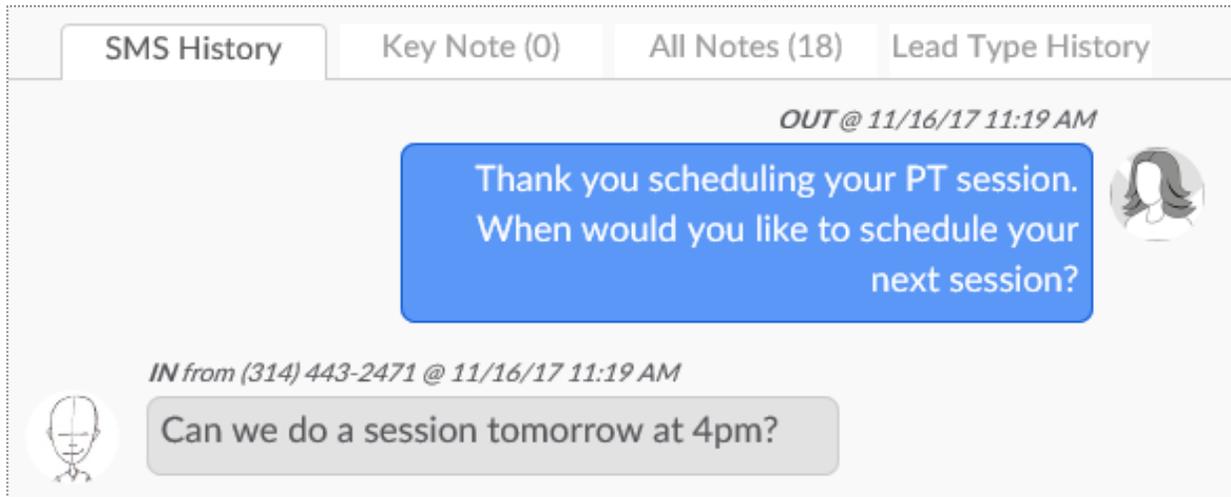
Unread Incoming SMS Messages (3)

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**.



# 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 <b>REQ</b>	Mr
<input checked="" type="checkbox"/> include in duplicate search	
Last Name <b>REQ</b>	Customer
<input checked="" type="checkbox"/> include in duplicate search	
Gender <b>REQ</b>	<input checked="" type="radio"/> MALE <input type="radio"/> FEMALE
<input type="checkbox"/> include in duplicate search	
Email	customer@cp.com
<input type="checkbox"/> include in duplicate search	
Cell Phone <b>REQ</b>	85512147946
Home Phone	
Work Phone	
<input type="checkbox"/> include in duplicate search	
Date Of Birth	Month ▾ Day ▾ Year ▾
Address <b>REQ</b>	1 Main Street
City <b>REQ</b>	Anywhere
State <b>REQ</b>	MO
ZIP Code <b>REQ</b>	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.

# Write Up New Agreement

Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup [minimize installment list](#)

\$  [Update All 6 Installment Prices](#)

# 1	<a href="#">Down</a>	\$ <input type="text" value="50"/>	<input type="text" value="11/10/2017"/>
# 2	<a href="#">Draft</a>	\$ <input type="text" value="50"/>	<input type="text" value="12/10/2017"/>
# 3	<a href="#">Draft</a>	\$ <input type="text" value="50"/>	<input type="text" value="1/10/2018"/>
# 4	<a href="#">Draft</a>	\$ <input type="text" value="50"/>	<input type="text" value="2/10/2018"/>
# 5	<a href="#">Draft</a>	\$ <input type="text" value="50"/>	<input type="text" value="3/10/2018"/>
# 6	<a href="#">Draft</a>	\$ <input type="text" value="50"/>	<input type="text" value="4/10/2018"/>

[Auto-Renew Evergreen explain](#)  Yes  No (Basic Membership Plan) At \$

[Annual Enhancement Fee](#)  Yes  No \$  on  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
<b>Total Due Today</b>	<b>\$50.00</b> <a href="#">PTP Option</a>

**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  [Reset Discount](#)

# 1	<input type="button" value="Down"/>	\$ 29.99 <small>+ tax</small>	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	
<b>Total Due Today</b> <input type="checkbox"/>		<b>\$32.09</b>	

**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

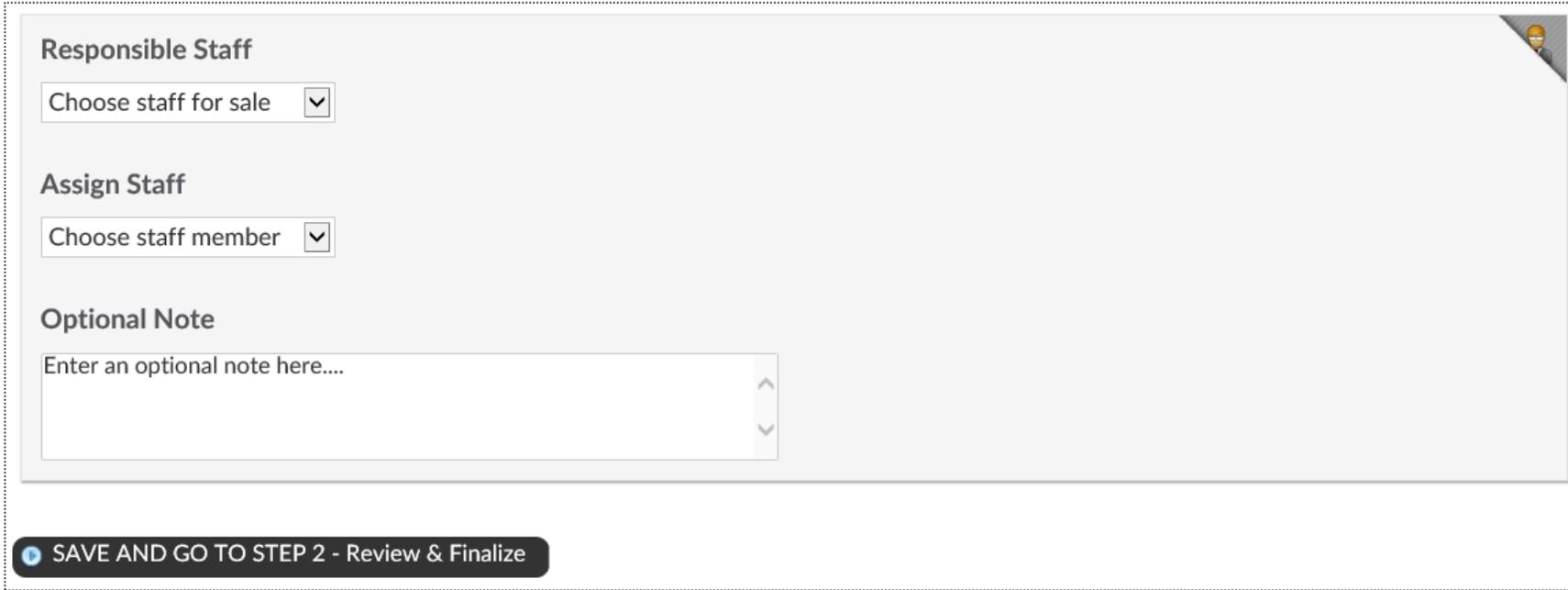
Select Plan > Adjust Pricing & Pay Dates

Opportunity Setup		Brooks Discount	Enter Promo Code	<input checked="" type="checkbox"/> Apply Discount	<a href="#">Reset Discount</a>
# 1		\$ 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	
<b>Total Due Today</b> 		<b>\$32.09</b>		<b>\$28.88</b>	

Once applied, it will automatically display the discount.

# Write Up New Agreement

## Assigning Sales Commission & Member Contact



**Responsible Staff**  
Choose staff for sale ▼

**Assign Staff**  
Choose staff member ▼

**Optional Note**  
Enter an optional note here....

**SAVE AND GO TO STEP 2 - Review & Finalize**

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

# 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

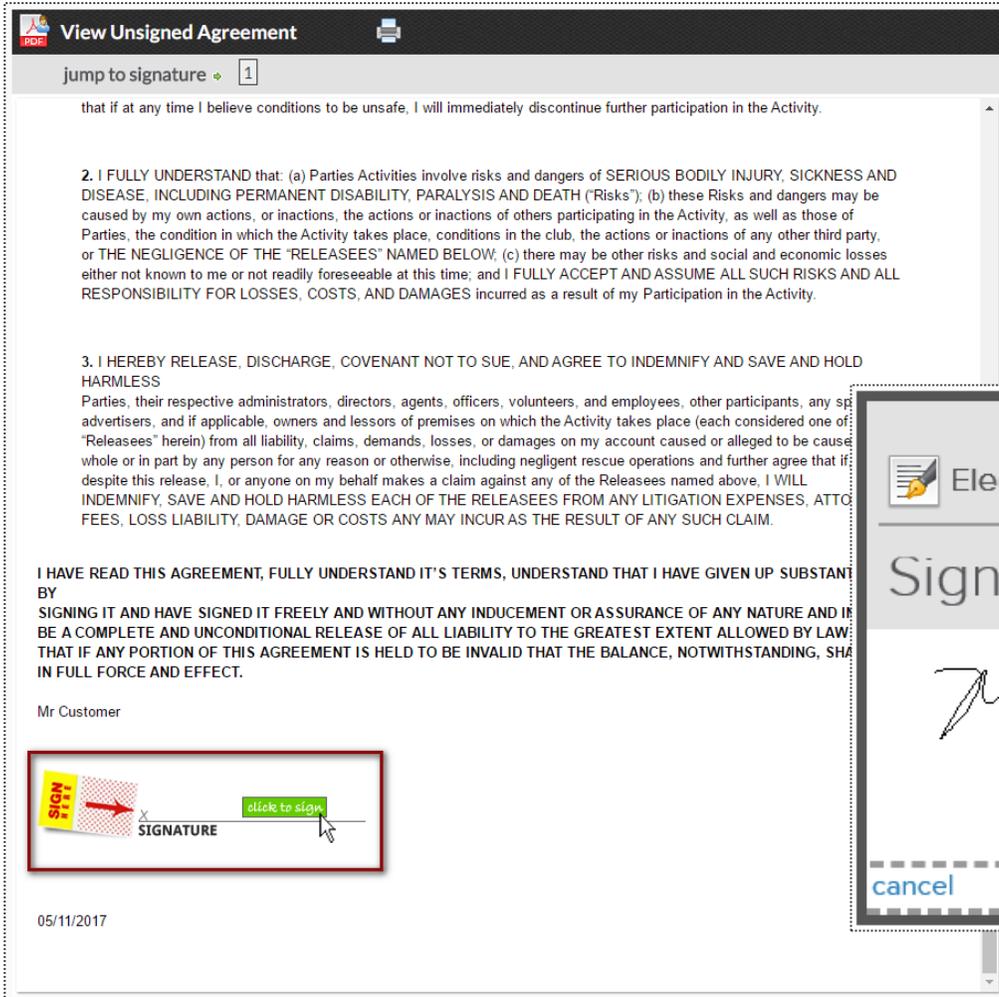
 **CLICK HERE TO ONLY TAKE SIGNATURES**

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 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 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 I WILL 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](#)

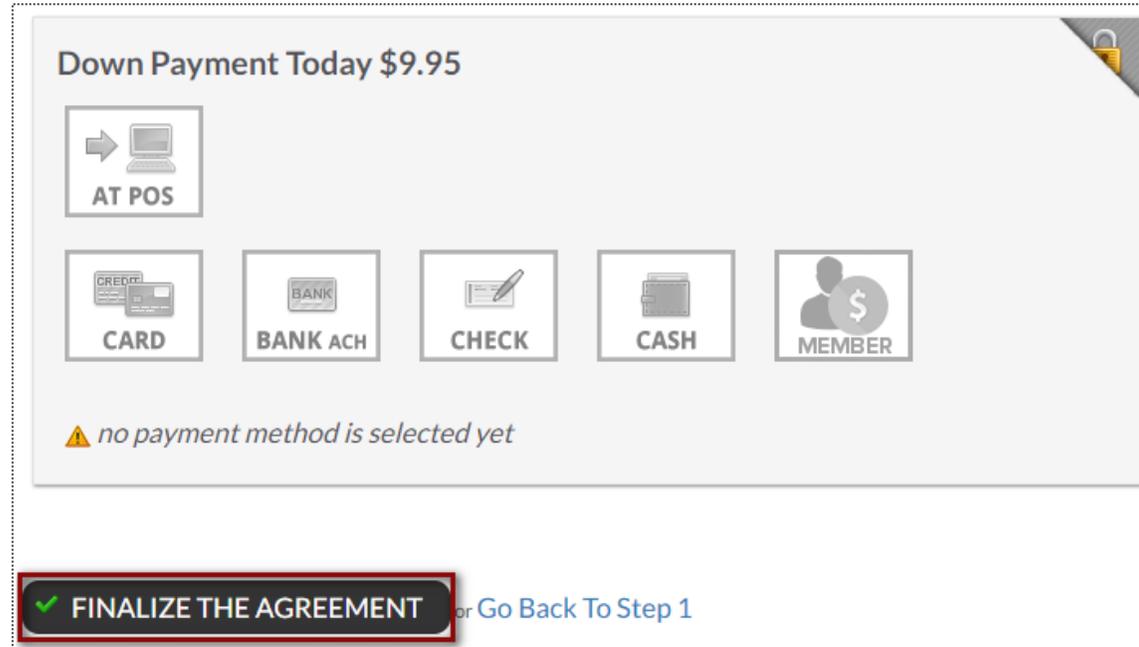
Sign here!



[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 [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'.



# 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**

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

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

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

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

Change Package Type

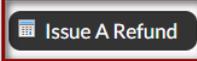
Optional Note

or cancel

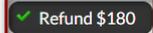
Selecting the option **Adjust The Invoice Details** will update the screen to display all options you can adjust for this one invoice. Make the desired changes to the invoice. Click the **Update** button to save changes.

# 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.

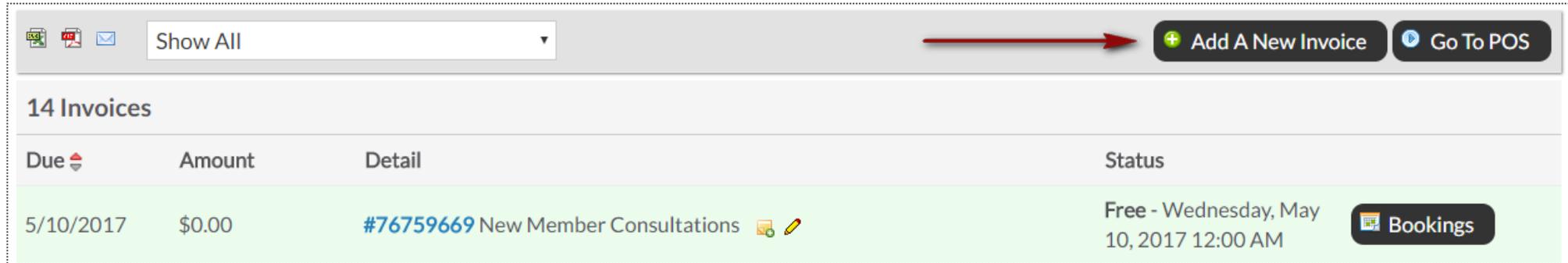
#76811337 Refund Paid Invoice Mister Customer	
\$180.00	
30Min Personal Training 4xMonth (monthly)	
Paid 5/11/2017 By Cash	
Customer Refund	
Refund Method	Select
Send Notification Email	Select
Partial Refund	Cash Written Check Client Credit Balance
Status of any associated bookings / credits	
Past bookings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

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

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

# Adding a New Invoice

Member > Billing > Invoices



The screenshot shows the 'Invoices' section of a software interface. At the top, there are icons for a calendar, a document, and an envelope, followed by a 'Show All' dropdown menu. To the right of the dropdown are two buttons: 'Add A New Invoice' (with a green plus icon) and 'Go To POS' (with a blue location pin icon). A red arrow points from the 'Show All' dropdown towards the 'Add A New Invoice' button. Below this is a section titled '14 Invoices'. A table lists the invoices with columns for 'Due', 'Amount', 'Detail', and 'Status'. The first row is highlighted in light green and shows a due date of 5/10/2017, an amount of \$0.00, a detail of '#76759669 New Member Consultations' with a calendar and pencil icon, and a status of 'Free - Wednesday, May 10, 2017 12:00 AM' with a 'Bookings' button.

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.

# Adding a New Invoice

Member > Billing > Invoices > Add A New Invoice

**+ Add A New Invoice**

Don't Tie To An Existing Agreement ▾

Select Sales Package or Fee Type

None  
Cancellation Fee  
Freeze Fee

Enter Invoice Description

Enter Invoice \$ Amount

\$

Enter Payment Due Date

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	<b>Full Details</b>
-----------	--------------	---	---------------------

### Agreement Freeze Options

A freeze puts an agreement on hold for either a specific or an indefinite period. A freeze can be reversed or updated at any later date.

Freeze Type	<input checked="" type="radio"/> Freeze A Specific Number Of Months <input type="radio"/> Freeze Indefinitely (Disabled In Setup)
	<input type="text" value="1"/> months
Start Freeze	<input checked="" type="radio"/> Immediately <input type="radio"/> On A Future Date
Charge A One Time Freeze Fee	\$ <input type="text"/>
Monthly Freeze Invoice At	\$ <input type="text"/>
Email A Notification Of Freeze?	<input checked="" type="radio"/> Yes <input type="radio"/> No to <input type="text" value="mr.customer@email.com"/>
Add An Optional Internal Note	<input type="text"/>
	<input checked="" type="checkbox"/> This freeze requires a signed freeze agreement
	<b>Implement Agreement Freeze</b>

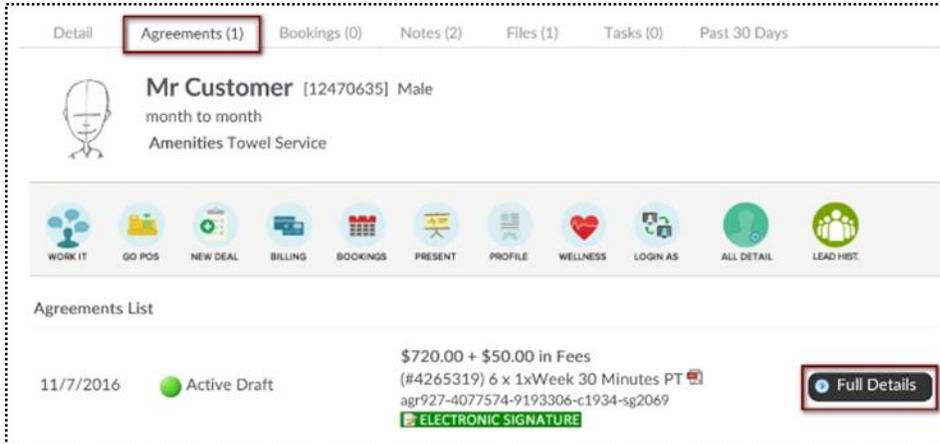
From this screen you can select the following: **Freeze Type, Start Freeze, Charge A One Time Freeze Fee / Monthly Freeze Invoice, Membership Expiration, Email Notification of Freeze.**

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



# Cancel an Agreement

Member Account > Agreements > Full Details > Cancel This Agreement



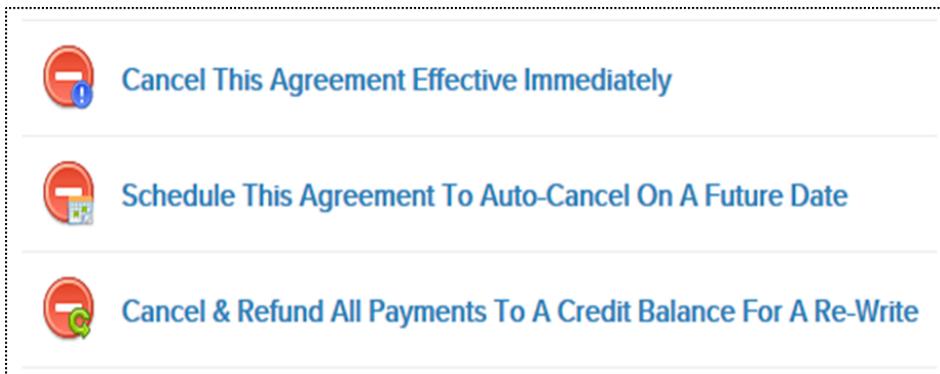
Detail **Agreements (1)** Bookings (0) Notes (2) Files (1) Tasks (0) Past 30 Days

 **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](#)

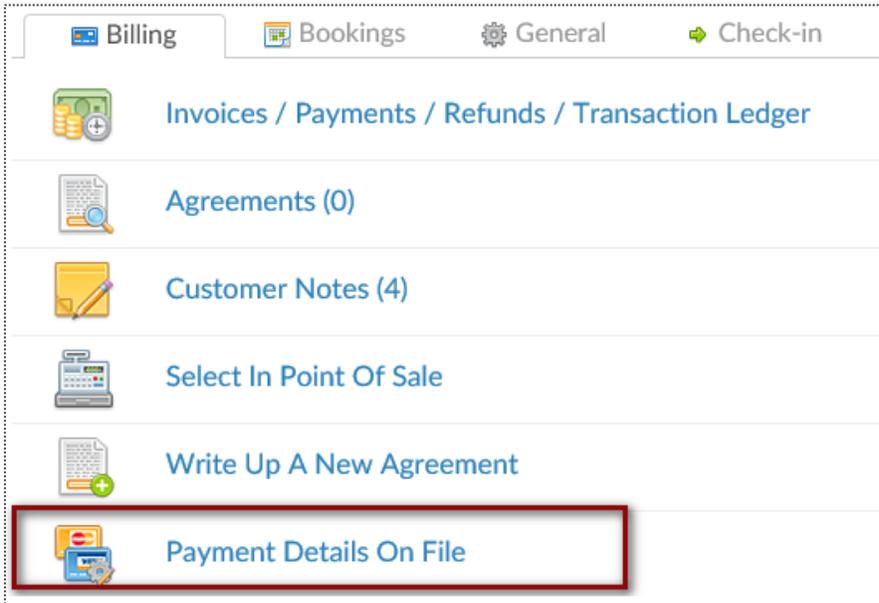
**Cancel This Agreement Effective Immediately:** This agreement will be cancelled today. All unpaid invoices will be cancelled.

**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

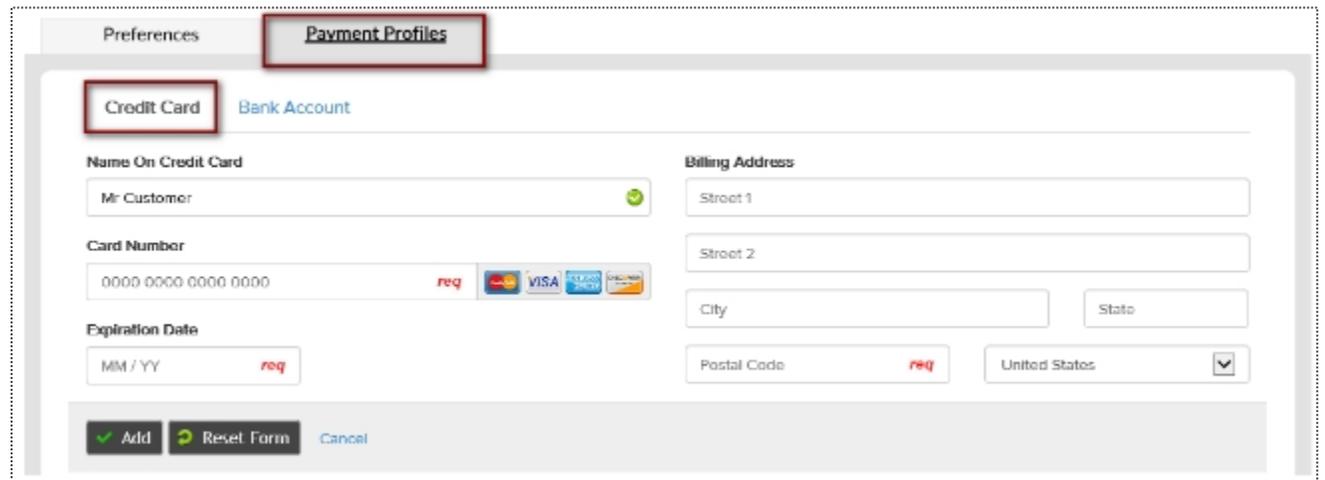


The screenshot shows a navigation menu with the following items:

- 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 includes the following fields:

- Name On Credit Card:** Mr Customer
- Card Number:** 0000 0000 0000 0000 (with a 'req' label and card icons for Visa, Mastercard, American Express, and Discover)
- Expiration Date:** MM / YY (with a 'req' label)
- Billing Address:** Street 1, Street 2, City, State, Postal Code (with a 'req' label), and United States (dropdown menu)

At the bottom of the form, there are three buttons: **Add** (with a green checkmark), **Reset Form** (with a circular arrow), and **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 <input type="checkbox"/>
Phone	(314) 457-5454
Cell Phone	
Work Phone	
Email Address	mrcustomer@clubready.com

The options available to edit are **Member Type**, **Name**, **Address**, **Phone Numbers**, **Email**, **Emergency Contacts**, **Date of Birth**, 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	<input type="text" value="2/13/2015"/>
Membership Expiration Date	<input type="text" value="1/21/2017"/>
Internal Prospect Type	<input type="text" value="PT Training Prospect"/>
Add A Note <i>(Optional)</i>	<input type="text"/>

[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



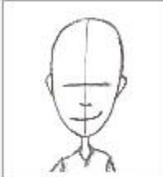
**Mr Customer** [18351389] Male  
Amenities None

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

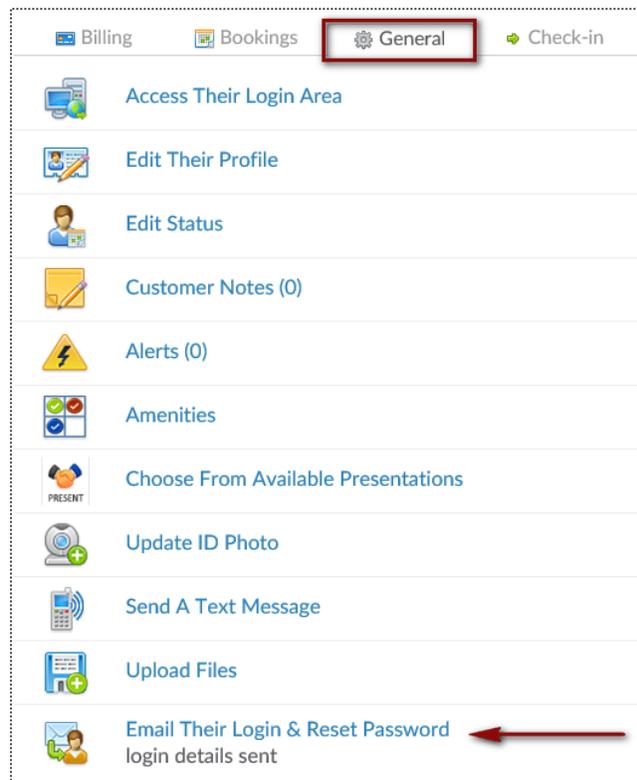
This **Alerts** function is particularly helpful in reminding staff to take a member's signature on an unsigned agreement. (Such as when the agreement was sold over the phone)

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.

# Email Login & Reset Password

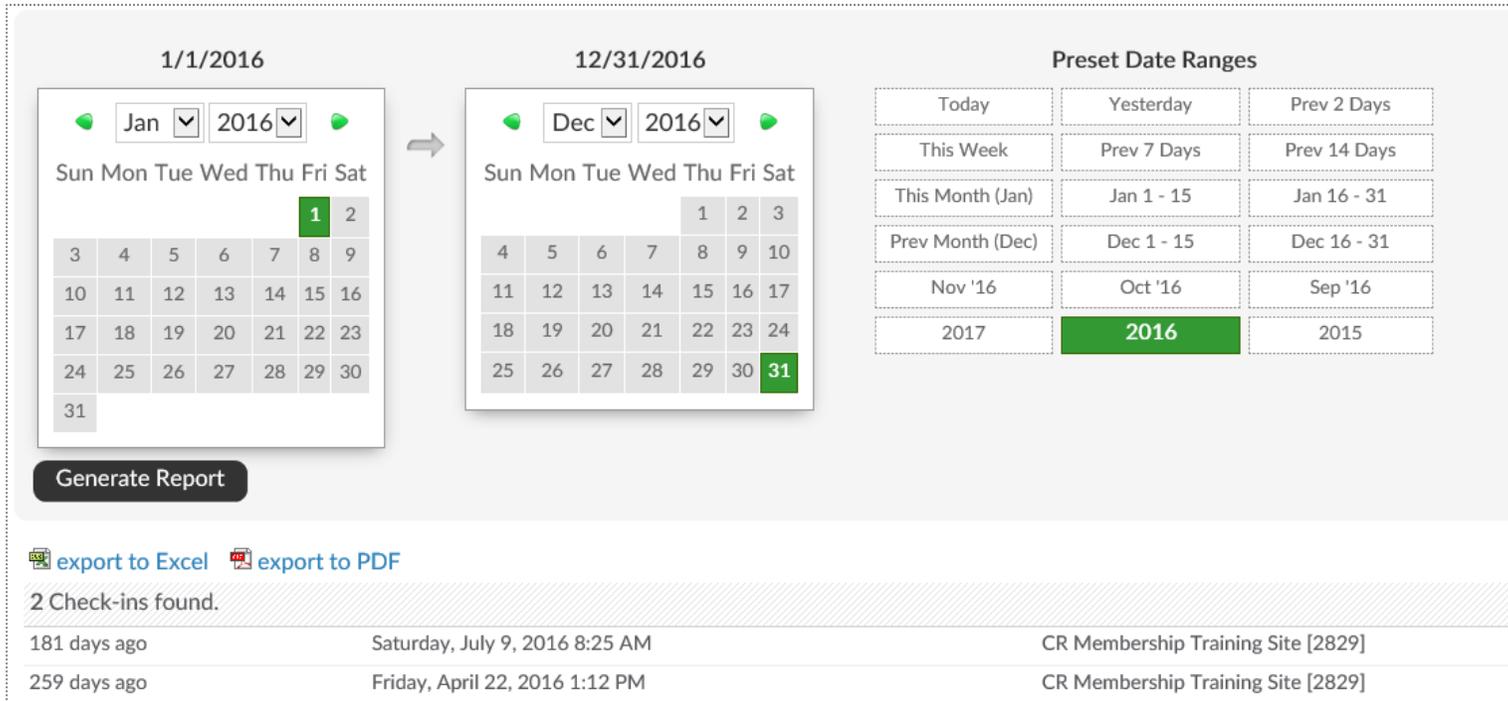


To access this screen click search and select the desired client. Verify the client has an email address, if not click the edit pencil to enter one. Click the **All Detail** button.

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



The screenshot displays the 'View Check In History' interface. It features two calendar views for date selection: '1/1/2016' (January 2016) and '12/31/2016' (December 2016). A 'Preset Date Ranges' table is also visible. Below the calendars is a 'Generate Report' button and export options for Excel and PDF. The report shows 2 check-ins found.

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

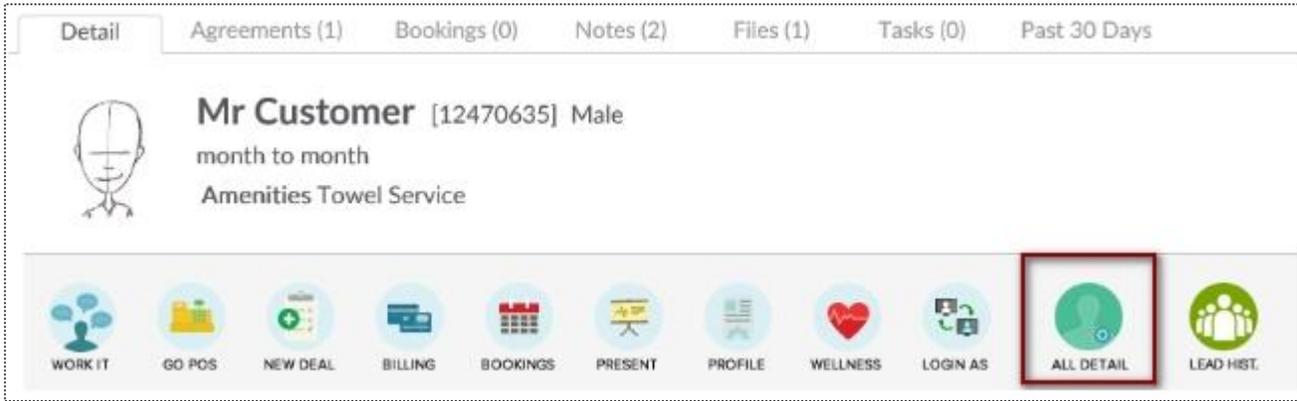
  

2 Check-ins found.		
181 days ago	Saturday, July 9, 2016 8:25 AM	CR Membership Training Site [2829]
259 days ago	Friday, April 22, 2016 1:12 PM	CR Membership Training Site [2829]

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

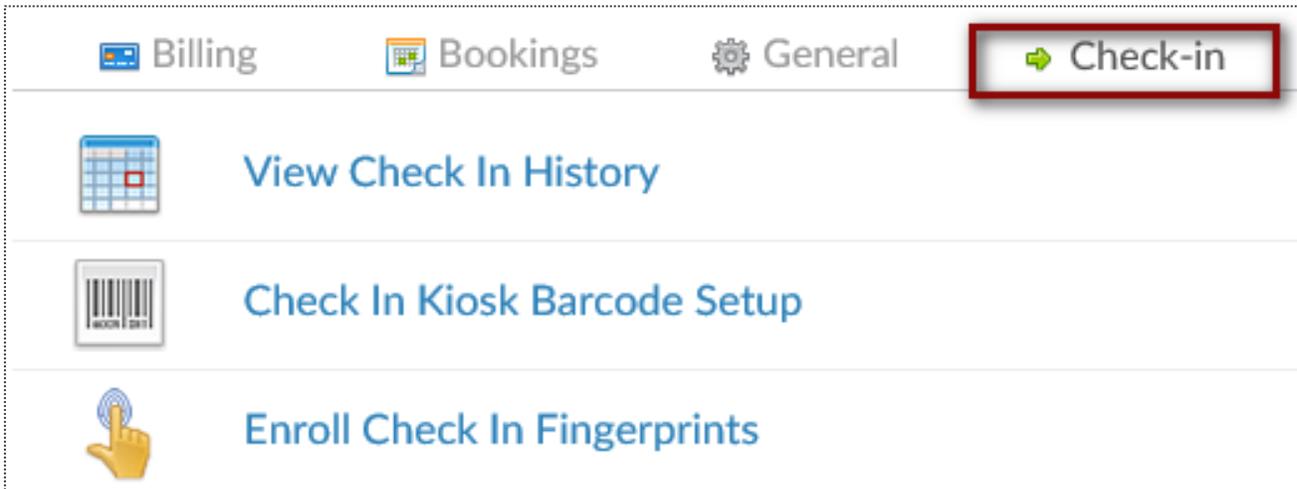


Detail | Agreements (1) | Bookings (0) | Notes (2) | Files (1) | Tasks (0) | Past 30 Days

 **Mr Customer** [12470635] Male  
month to month  
Amenities Towel Service

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

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



Billing | Bookings | General | **Check-in**

 **View Check In History**

 **Check In Kiosk Barcode Setup**

 **Enroll Check In Fingerprints**

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

# Update Barcode/Fingerprint



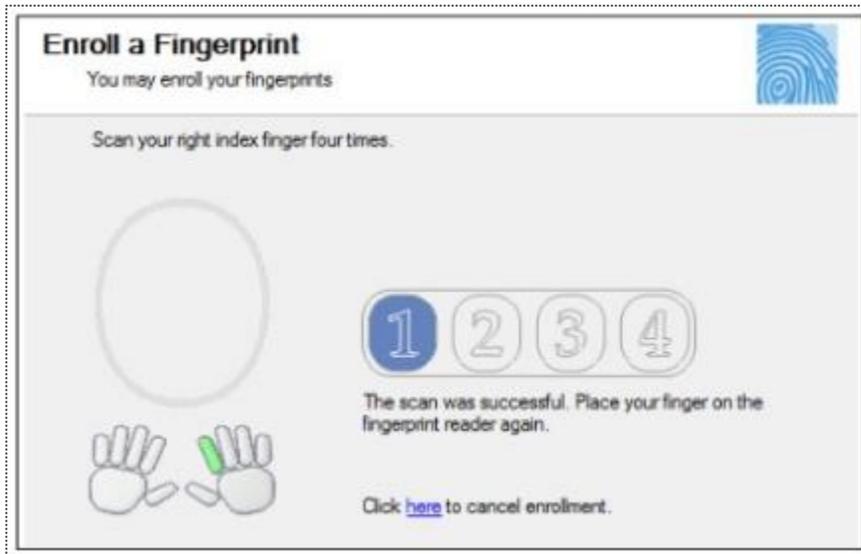
The screenshot shows a user interface for updating a barcode or fingerprint. It features three main options, each with a barcode icon and a plus sign:

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

**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 screenshot shows the "Enroll a Fingerprint" interface. It includes the following elements:

- Enroll a Fingerprint**: Title at the top left.
- You may enroll your fingerprints**: Subtitle below the title.
- Scan your right index finger four times.**: Instructional text.
- Scan window**: A large oval area for the fingerprint scan.
- Progress indicator**: A row of four numbered circles (1, 2, 3, 4). The number 1 is highlighted in blue.
- Success message**: "The scan was successful. Place your finger on the fingerprint reader again."
- Hand diagram**: A diagram of a hand with the right index finger highlighted in green.
- Cancel link**: "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

01:33:49 PM

 ClubReady

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](#).



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](#)

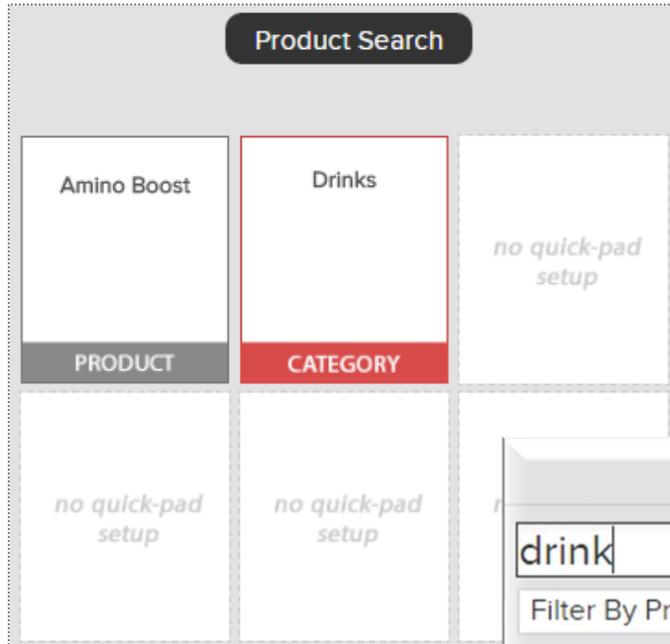
Item	Quantity	Taxable	Price	Extended Price
 Founders Unlimited Monthly Recurring Due 6/15/2018	1	-	\$89.00	\$89.00

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.

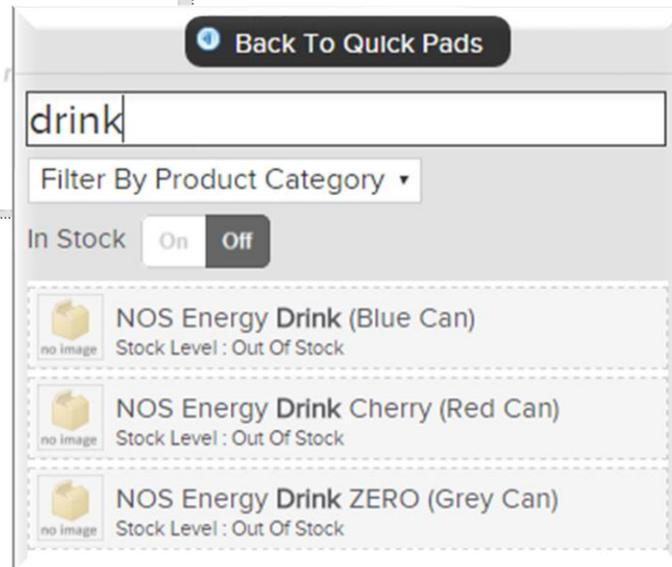
If the client has any invoices that are due, they will automatically populate in the POS shopping cart. You can also access the client's **Future Invoices** to take payment on an invoice not yet due. Any unfinished transactions can be resumed by selecting the **Incomplete Carts** button. Select **Add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

\$15.00

Item	Quantity	Taxable	Price	Extended Price
<input type="button" value="Update"/> <input type="button" value="Remove Item"/> <input type="button" value="Assigned to Current User"/>	<input type="text" value="1"/>		<input type="text" value="15.00"/>	
<input type="button" value="Apply A Product Discount To \$15.00"/> 5% Discount (\$14.25) 10% Discount (\$13.50) 15% Discount (\$12.75) 20% Discount (\$12.00)				
<input type="button" value="Cancel"/>				
<input type="text" value="enter a note (at least 10 characters)..."/>				

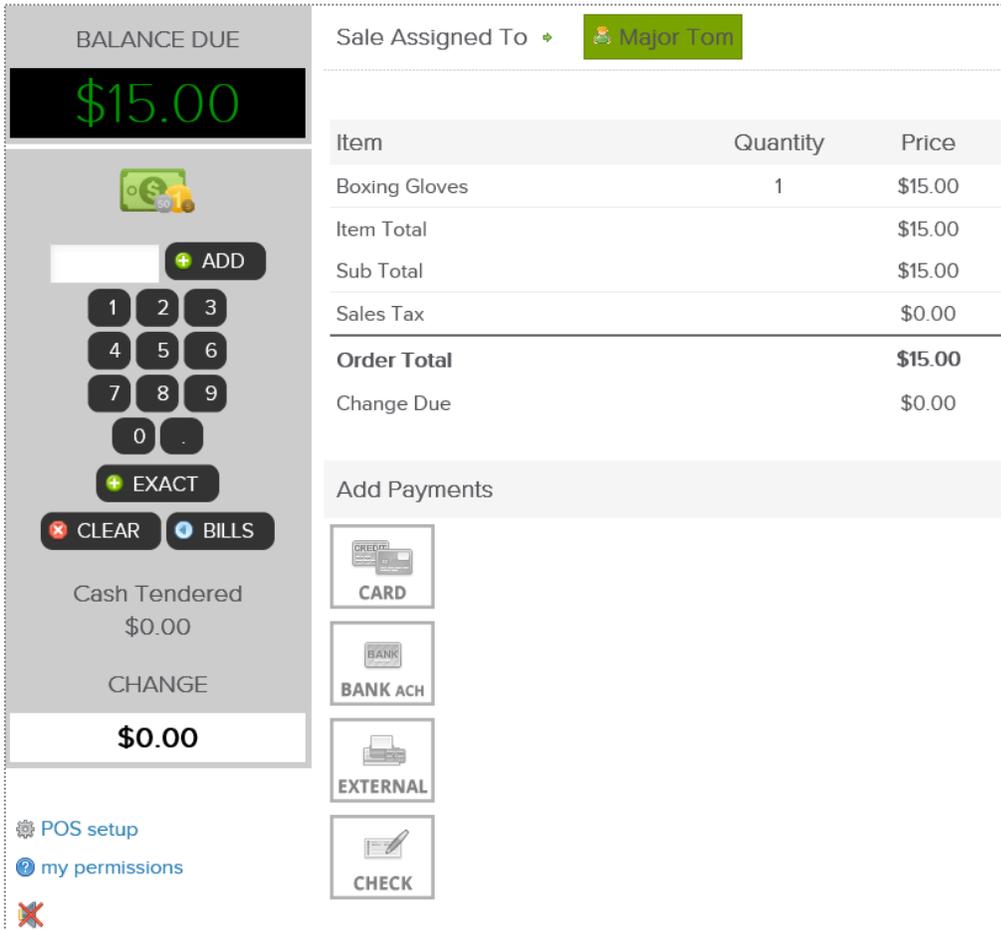
Adjustments may include; modifying the quantity, price, applying a discount or removing the product from the shopping cart.

Item Total	\$15.00
Sub Total	\$15.00
Sales Tax	\$0.00
<b>TOTAL</b>	<b>\$15.00</b>

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

# Finalizing the Purchase

Select the appropriate payment method.



The screenshot displays the StretchMed Point of Sale (POS) interface. On the left, a 'BALANCE DUE' section shows '\$15.00' in green. Below this is a numeric keypad with buttons for digits 1-9, 0, and a decimal point, along with '+ ADD', '+ EXACT', 'x CLEAR', and '+ BILLS' buttons. The 'Cash Tended' field shows '\$0.00' and the 'CHANGE' field shows '\$0.00'. At the bottom left, there are links for 'POS setup' and 'my permissions', and a red 'X' icon.

The main area shows 'Sale Assigned To' as 'Major Tom'. Below this is a table with the following items:

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

Below the table is the 'Add Payments' section with four options: 'CARD' (with a credit card icon), 'BANK ACH' (with a bank icon), 'EXTERNAL' (with a printer icon), and 'CHECK' (with a check icon).

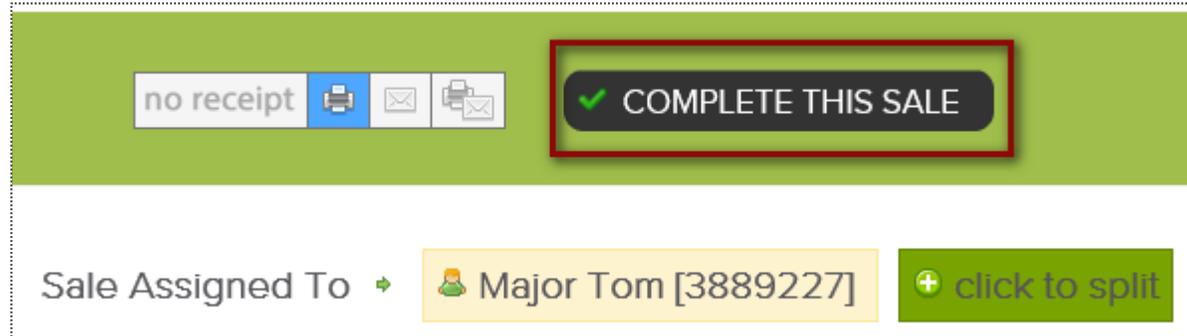
Select the appropriate payment method. If paying by credit card you will be prompted to select card on file, swipe or enter the card information.

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

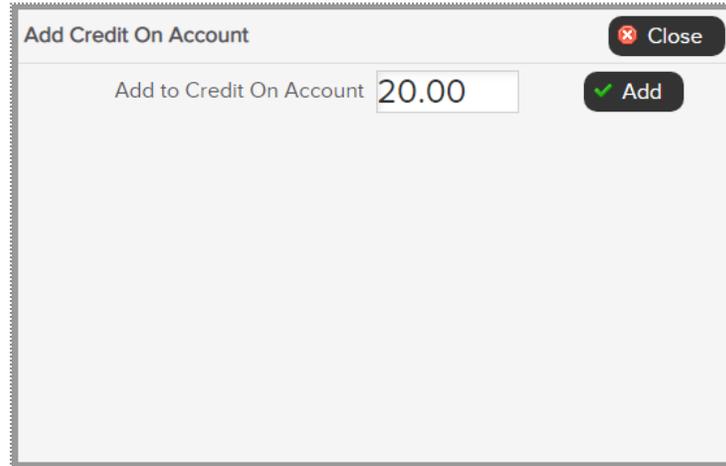
Main > POS



Mister Customer [13317697]

0 Open Carts | [18 Paid Invoices](#) | [4 Future Invoices](#) | [5 Payments](#) | [Add Credit To Account](#)

\$0.00



Add Credit On Account

Add to Credit On Account

Close

Add

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	InventoryValuc	SetInventoryTo	IncreaseInventoryBy	DecreaseInventoryBy
4	121835	SKU121835		\$25 Gift Card	98	\$0.00			
5	101760	SKU18957		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

# Classes: Add a Class to the Schedule

Bookings > Classes

TIME / DATE	MON JAN 22 <span>+ ADD A CLASS</span>	TUE JAN 23 <span>+ ADD A CLASS</span>
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](#)

### 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 [HELP](#)

[Schedule The Class](#)

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 schedule.

# Classes: Schedule a Class Booking

Bookings > Classes

TIME / DATE	<span>+ ADD A CLASS</span> MON JAN 22	<span>+ ADD A CLASS</span> TUE JAN 23
6:00 AM	<div style="border: 2px solid red; padding: 2px;">50 Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div>	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 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

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)

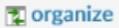
'Session Credits' are pre-paid sessions that do not have any booking tied to them yet. If these paid sessions have an expiration date then they will be lost after that date if they remain unused

[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  
mrcustomer@clubready.com

Send A Text Message No Cell Phone

Optional Internal Note (Mr will not see it)

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		

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

 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 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)*

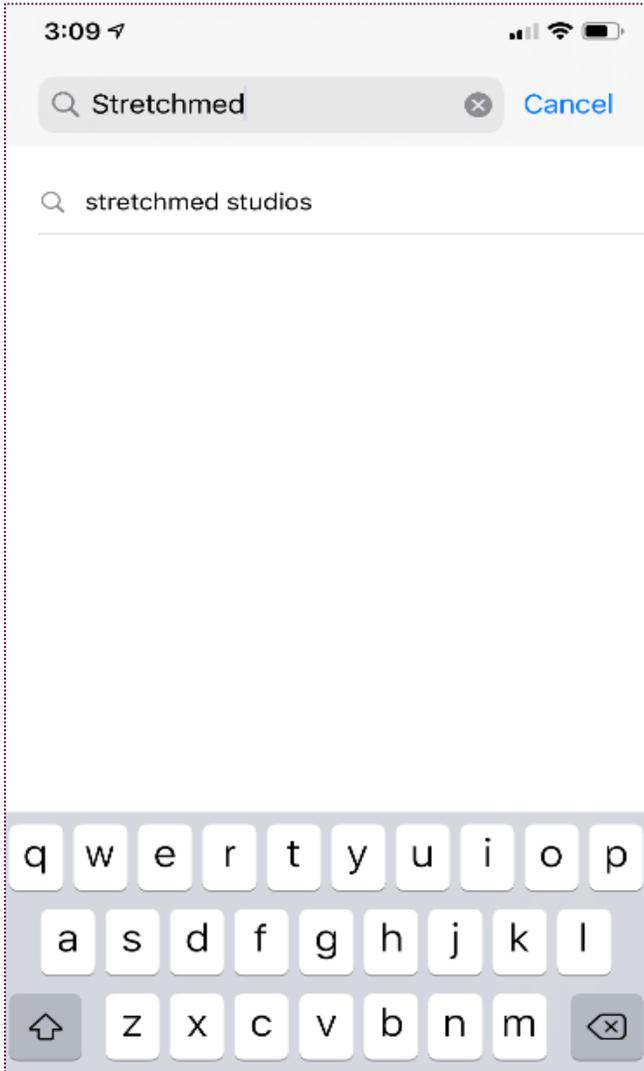
Booking #40329770 Note 1/5/2017 Fitness

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.



Mobile App

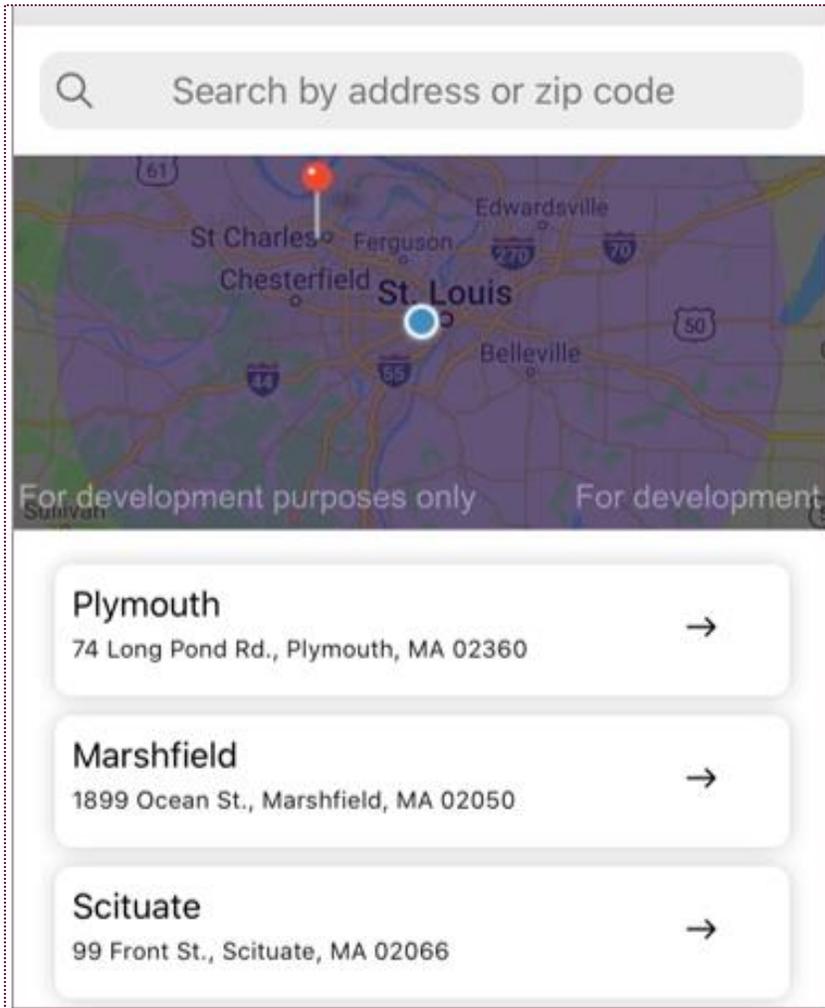
# Searching and Downloading



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

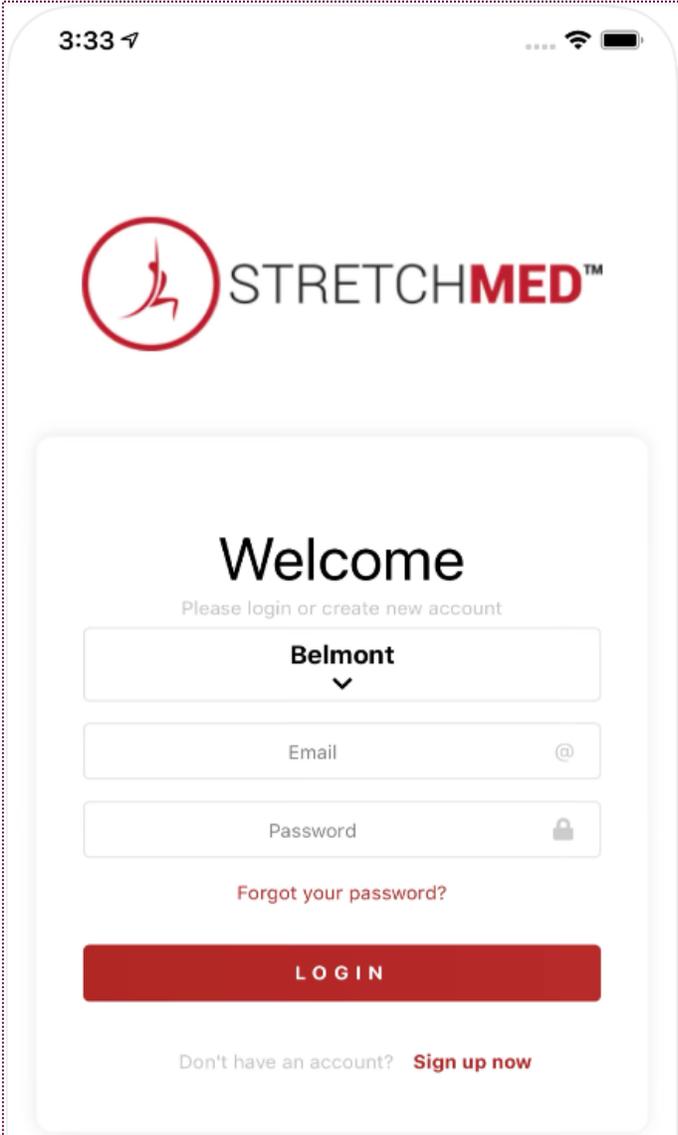


The user can search nearby locations by entering an address or zip code.

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.

# New User Sign Up



3:33

 STRETCHMED™

Welcome

Please login or create new account

Belmont  
▼

Email @

Password 🔒

[Forgot your password?](#)

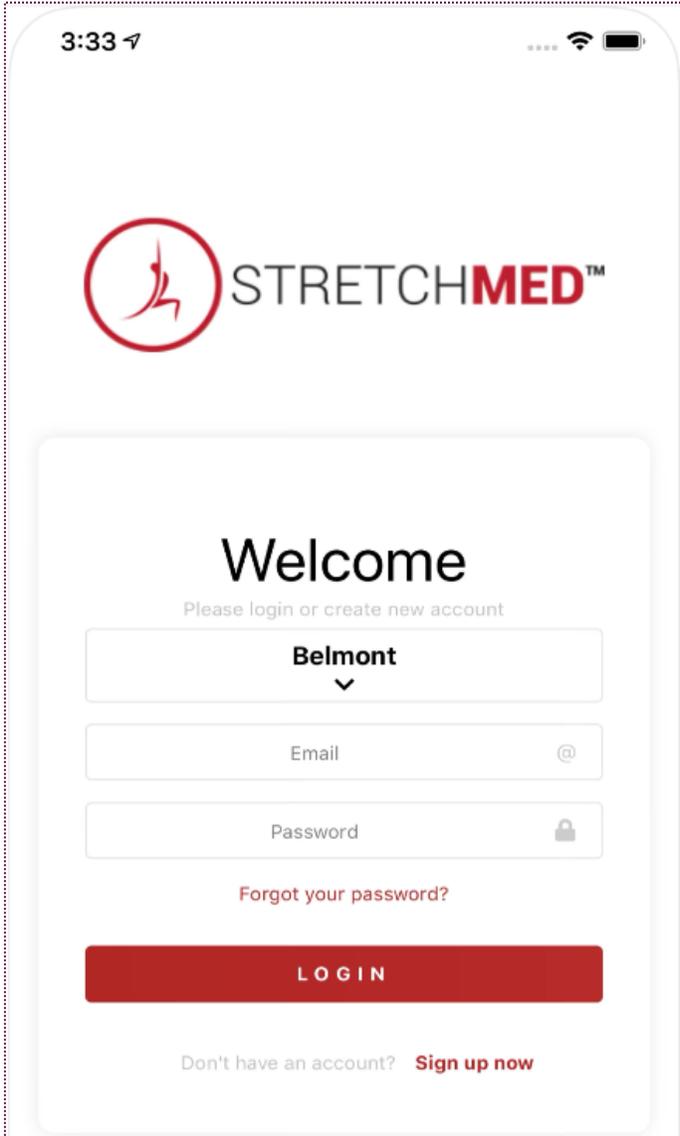
**LOGIN**

Don't have an account? [Sign up now](#)

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.



# Login Page



3:33

 STRETCHMED™

**Welcome**  
Please login or create new account

**Belmont** ▼

Email @

Password 🔒

[Forgot your password?](#)

**LOGIN**

Don't have an account? [Sign up now](#)

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.

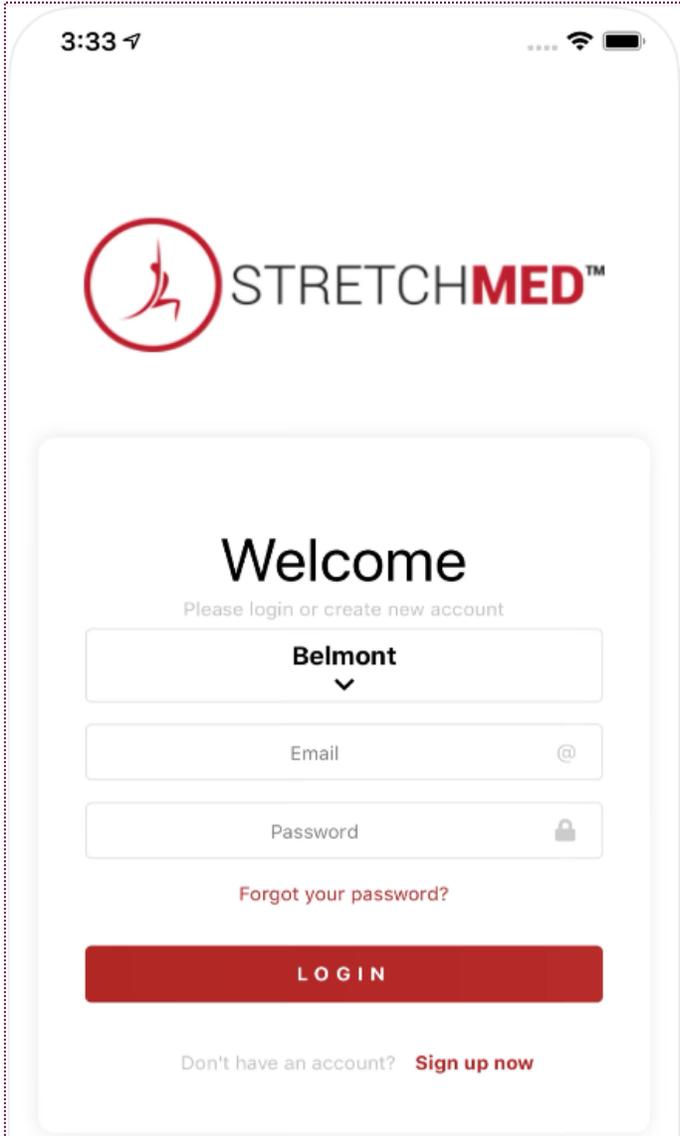
If the user does not know their password, the user can reset by using the 'Forgot Your Password?' link.

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>



# Login Troubleshooting



3:33

 STRETCHMED™

**Welcome**  
Please login or create new account

Belmont  
▼

Email @

Password 🔒

[Forgot your password?](#)

**LOGIN**

Don't have an account? [Sign up now](#)

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>

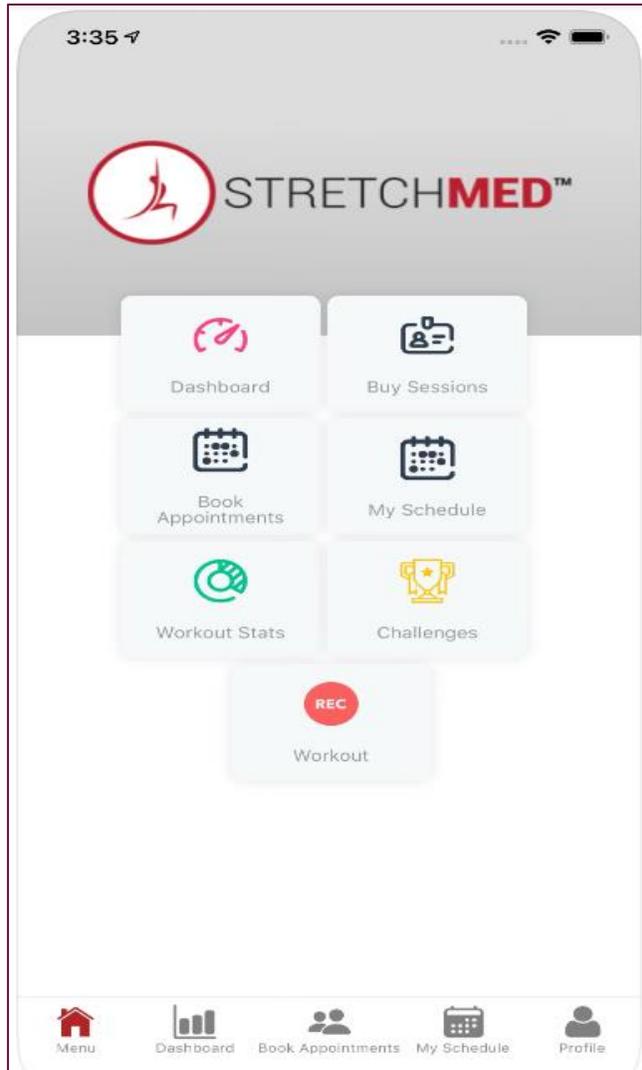
**Merge A Duplicate Profile:** <https://www.clubready.com/wiki/WK19128952393>

**Delete A Member / Customer / Prospect:**

<https://www.clubready.com/wiki/WK18327804136>



# Menu Screen



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



# Dashboard

**1**  
SMALL GROUP 30

**BOOK**

My Next Booking

Your next session

Trainer 3 **Sep, 8th**

**Small Group 60**  
**4:00 PM - 5:00 PM**

**My Spot: 1**

Past 30 days

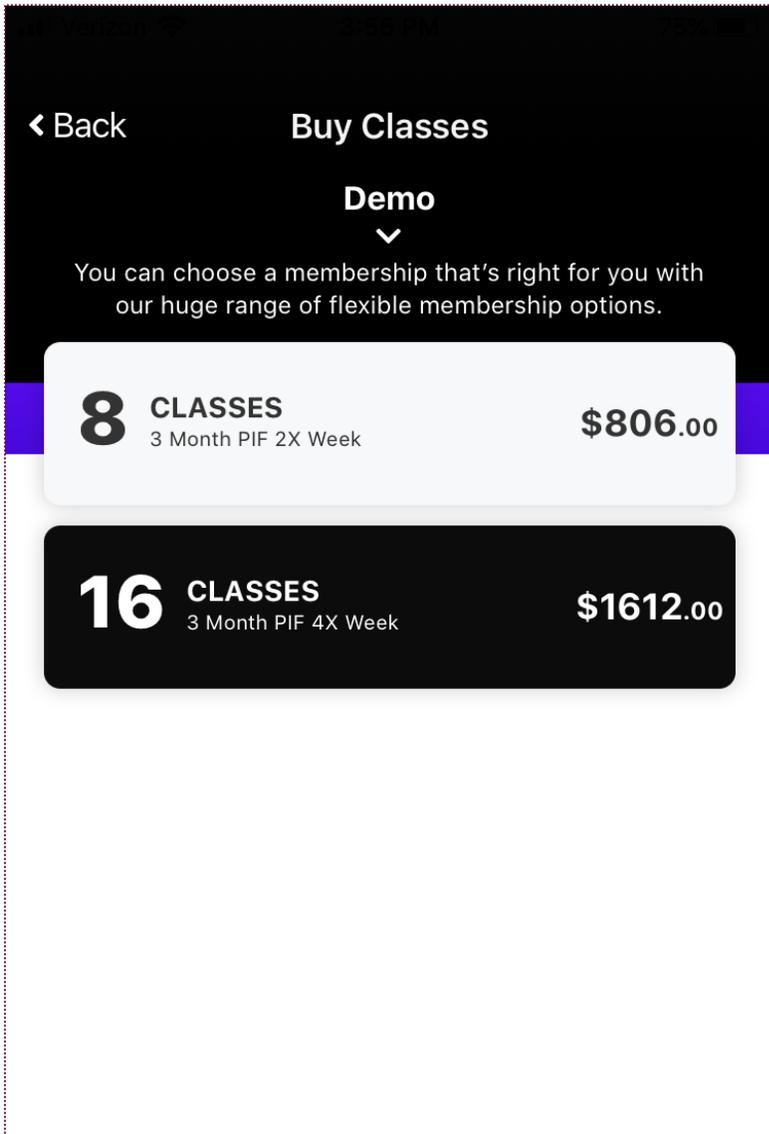
**0** **0**

Number of Class Credits Remaining

Upcoming Bookings

Workout Stats

# Buy Classes



← Back      Buy Classes

**Demo**  
▼

You can choose a membership that's right for you with our huge range of flexible membership options.

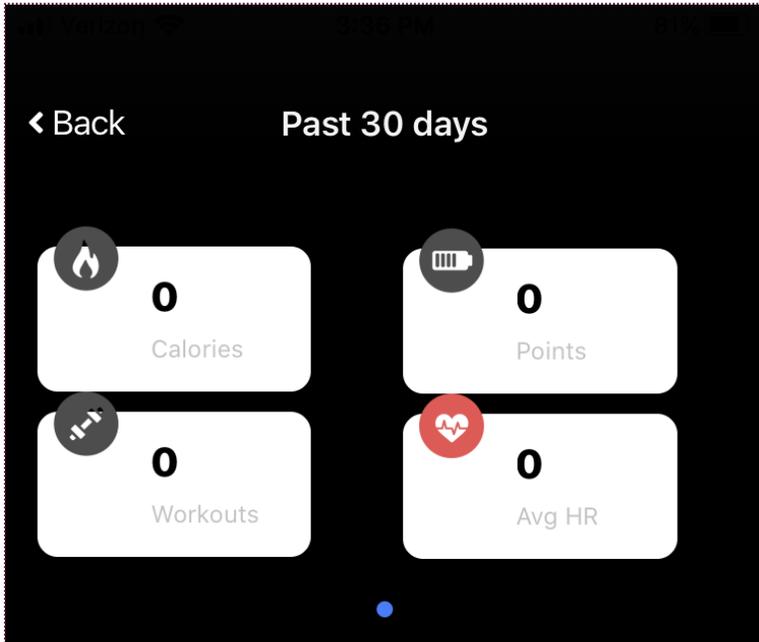
<b>8</b> CLASSES 3 Month PIF 2X Week	<b>\$806.00</b>
<b>16</b> CLASSES 3 Month PIF 4X Week	<b>\$1612.00</b>

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>

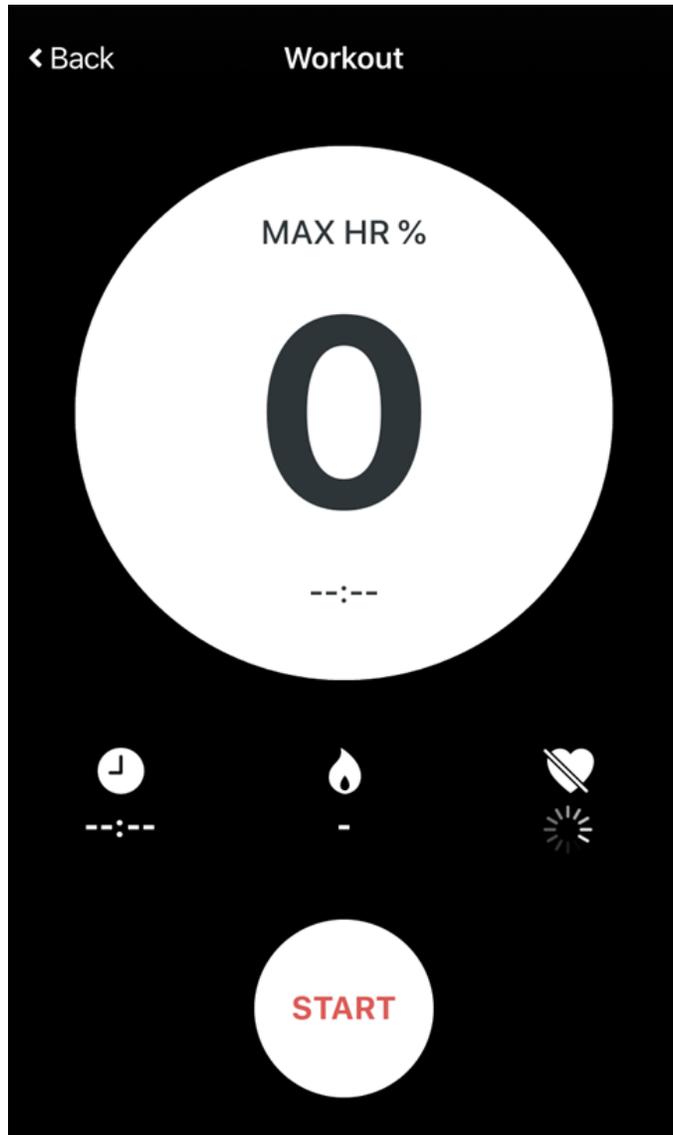
# Workout Stats



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

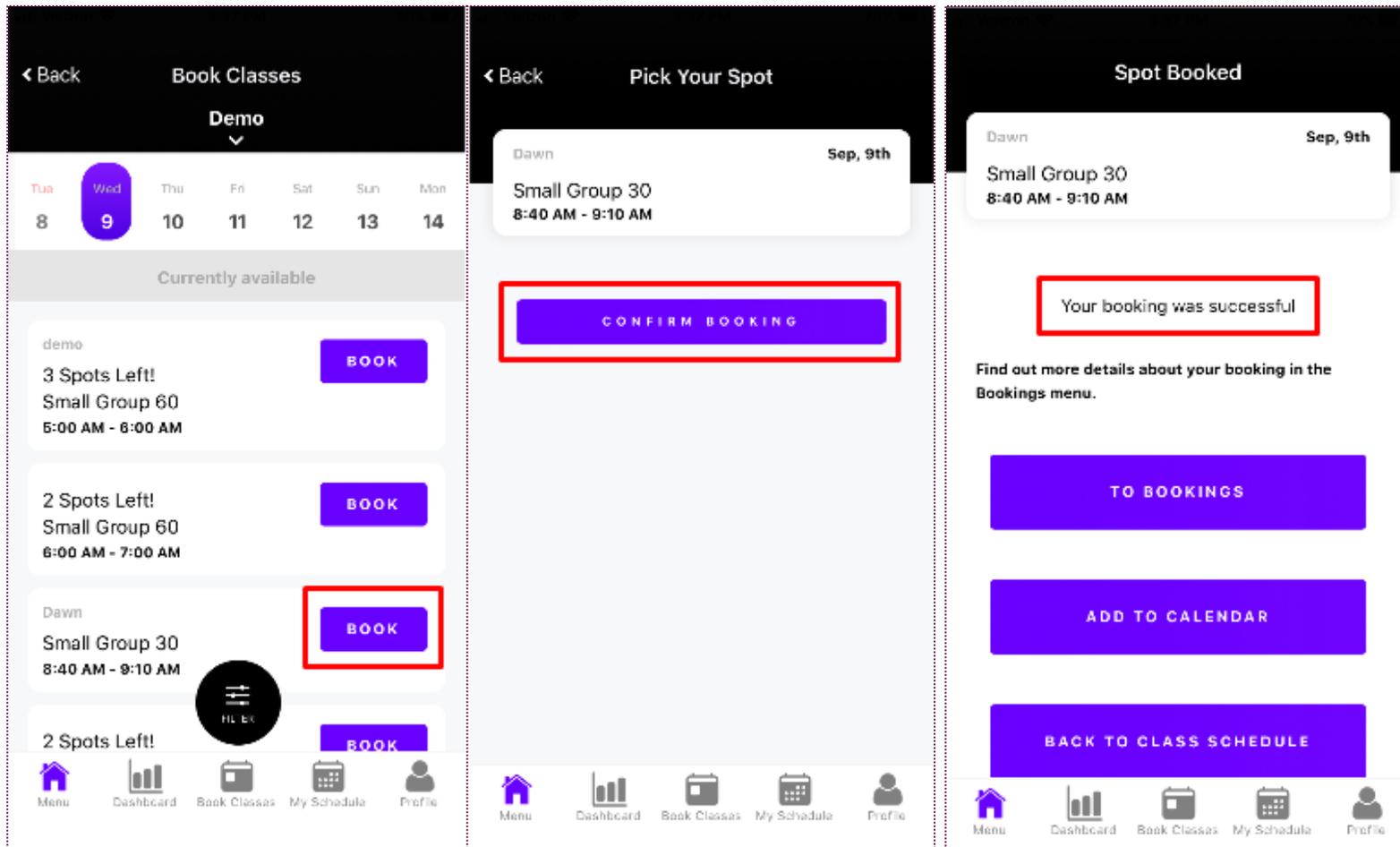
If user has a Bluetooth-enabled HRM/Apple watch, it can be connected to their phone and track stats for classes and/or at home.

# New Workout



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

# Book Classes



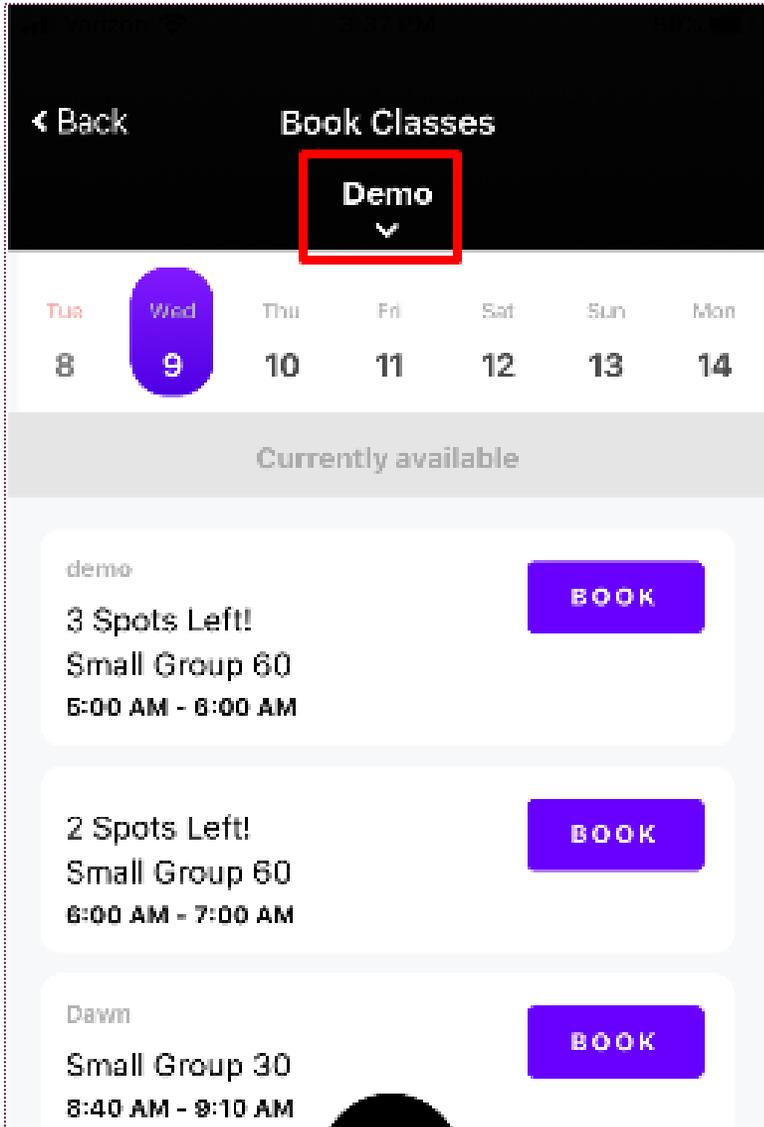
View home location's schedule to book classes.

Click 'Book' to begin the booking process.

User will be asked to confirm the booking.

Once confirmed, the user will receive a successful message.

# Cross-Club Book

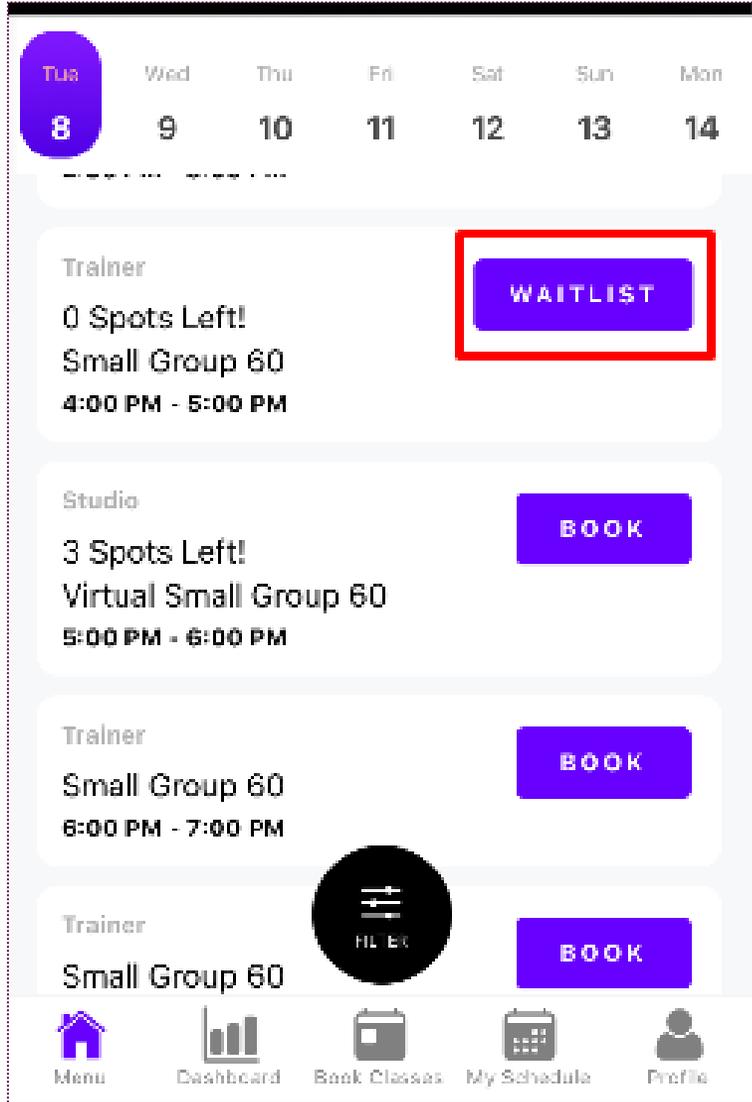


If cross-club bookings have been set up between multiple clubs, the user can navigate to the other location(s) class schedule to book a class.

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



The screenshot shows a mobile application interface for a fitness studio. At the top, there is a calendar view for the week of Tuesday, August 8th to Monday, August 14th. Below the calendar, there are four class listings, each with a button to either 'BOOK' or 'WAITLIST'.

Day	Date
Tue	8
Wed	9
Thu	10
Fri	11
Sat	12
Sun	13
Mon	14

Trainer	Spots Left!	Class Name	Time	Action
Trainer	0 Spots Left!	Small Group 60	4:00 PM - 5:00 PM	WAITLIST
Studio	3 Spots Left!	Virtual Small Group 60	5:00 PM - 6:00 PM	BOOK
Trainer	3 Spots Left!	Small Group 60	6:00 PM - 7:00 PM	BOOK
Trainer	3 Spots Left!	Small Group 60	6:00 PM - 7:00 PM	BOOK

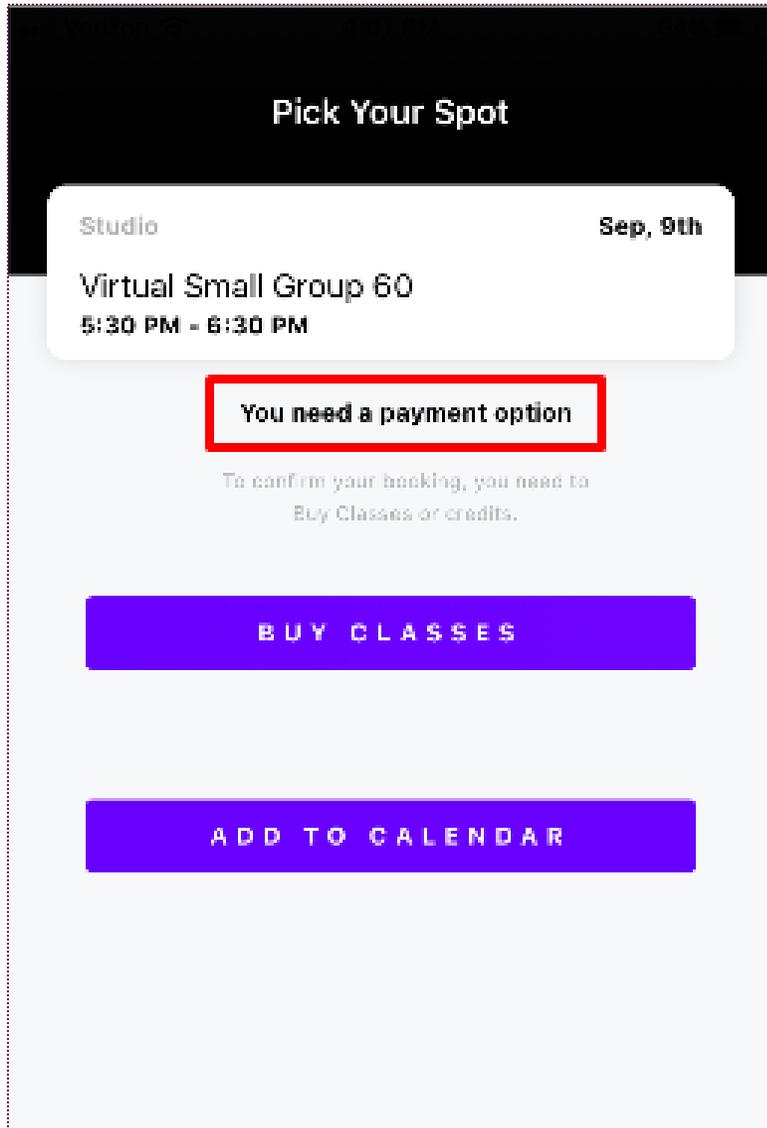
At the bottom of the screen, there is a navigation bar with five icons: Home, Dashboard, Book Classes, My Schedule, and Profile. A circular menu icon is also visible over the bottom class listing.

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>

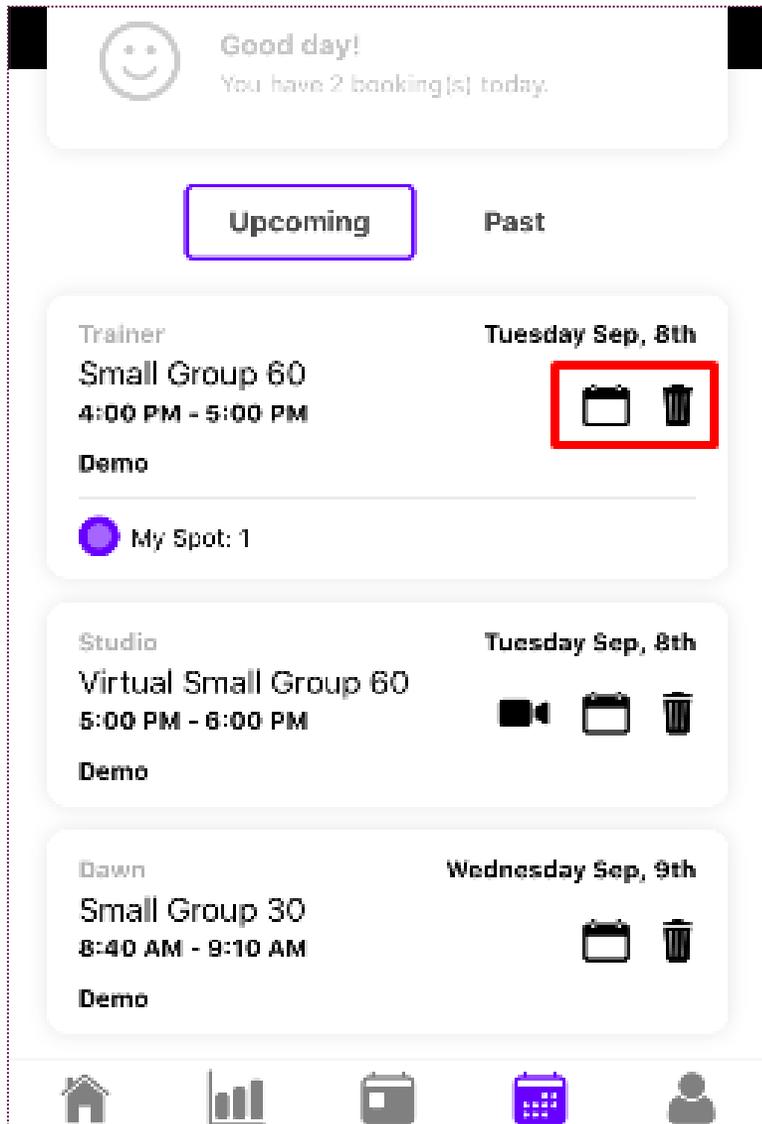
# Book Classes Troubleshooting



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.

# Bookings



Shows currently enrolled classes.

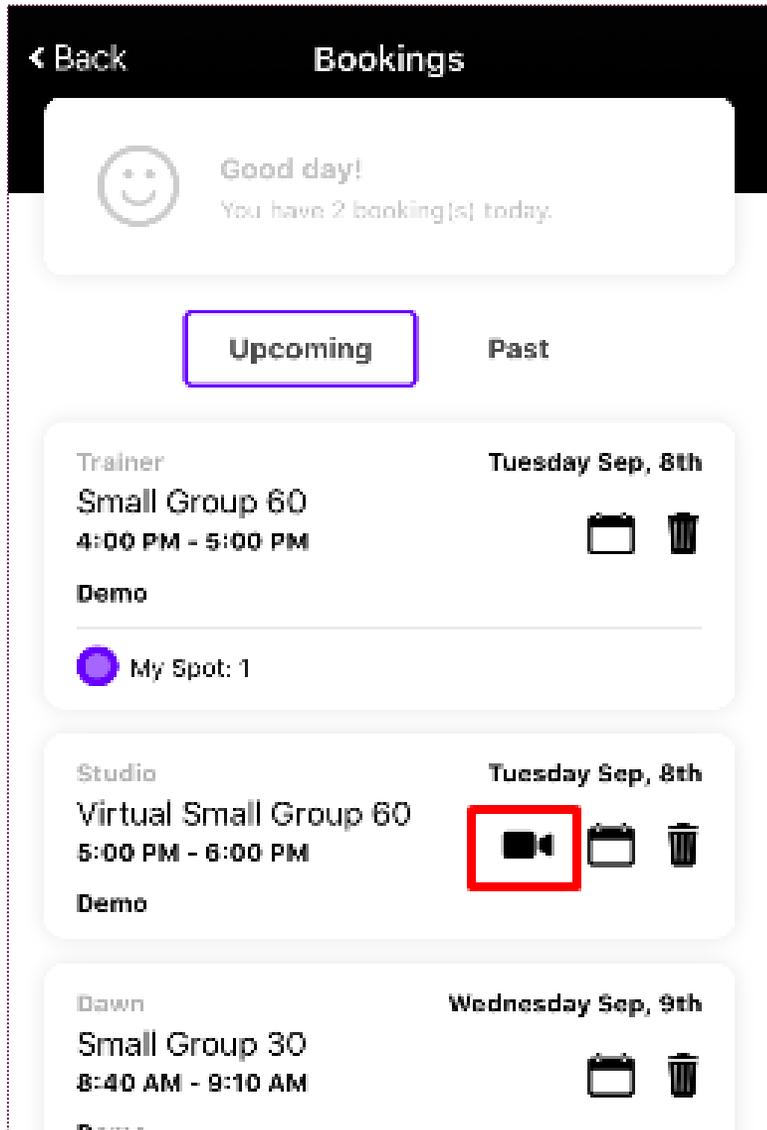
User can view past bookings as well.

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.

# 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.

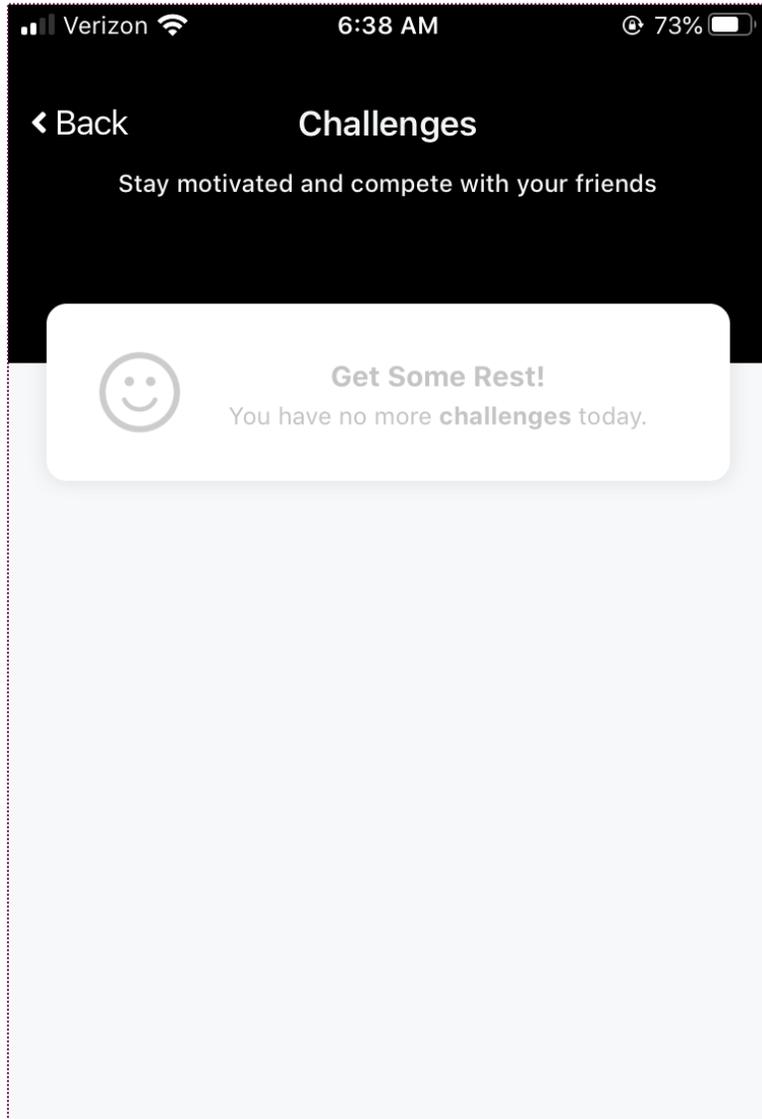
The Zoom app will need to be downloaded beforehand. If not, the user will be prompted to download the Zoom app when clicking this icon and then be brought to the Zoom meeting once downloaded.

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>

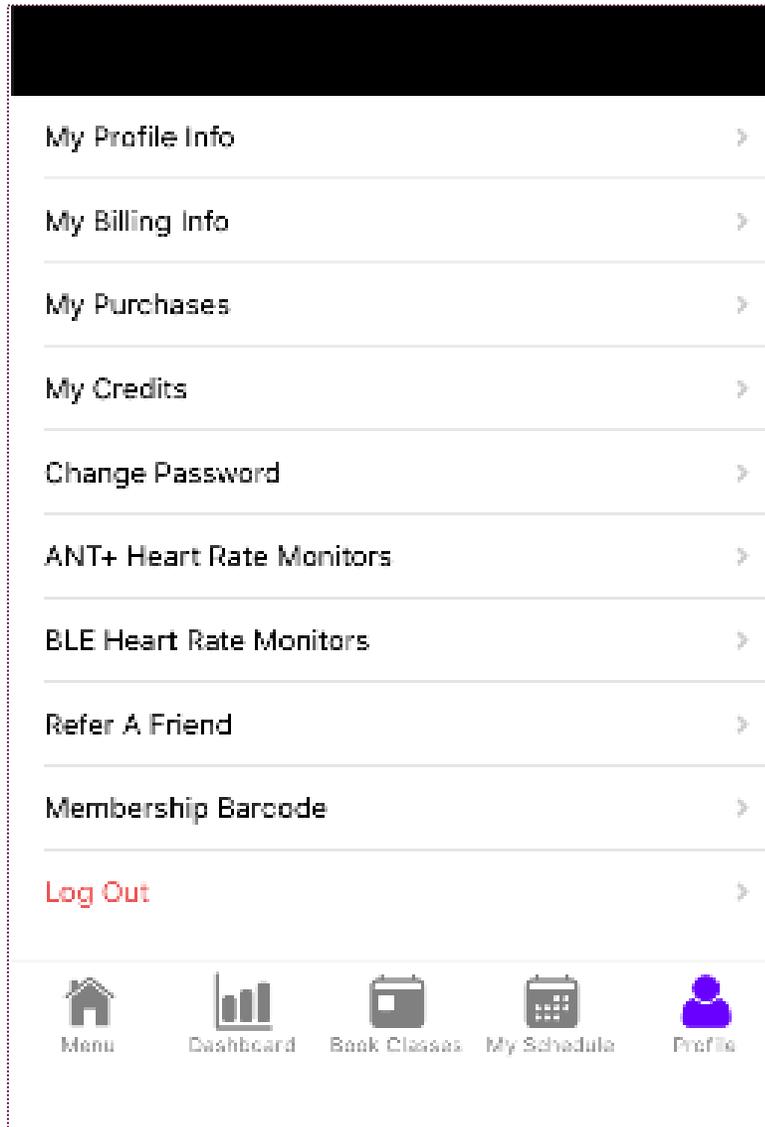
# Challenges



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

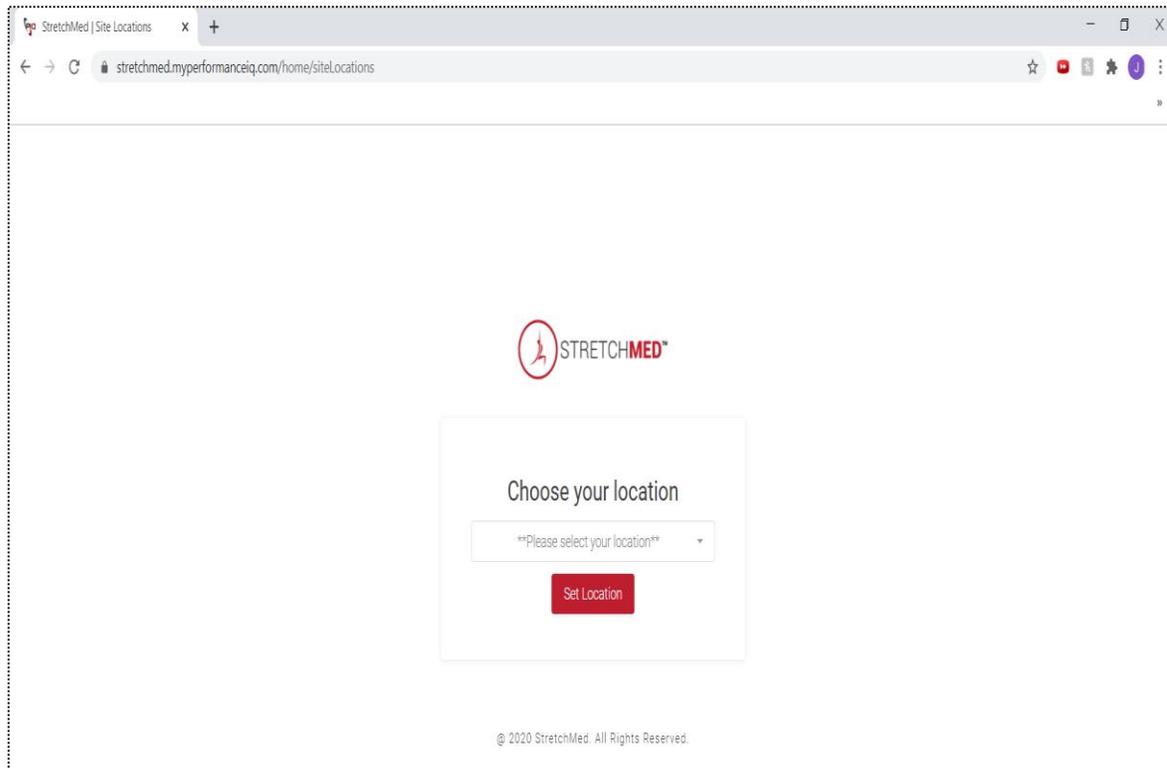


- My Profile Info = basic profile information
- My Billing Info = payment profile
- Change Password = reset password
- My Purchases = purchases made through the app
- My Credits = credits remaining
- ANT+ Heart Rate Monitors = register a new HRM
- BLE Heart Rate Monitors = pair a Bluetooth enabled HRM
- 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



Web Portal

# Web Account



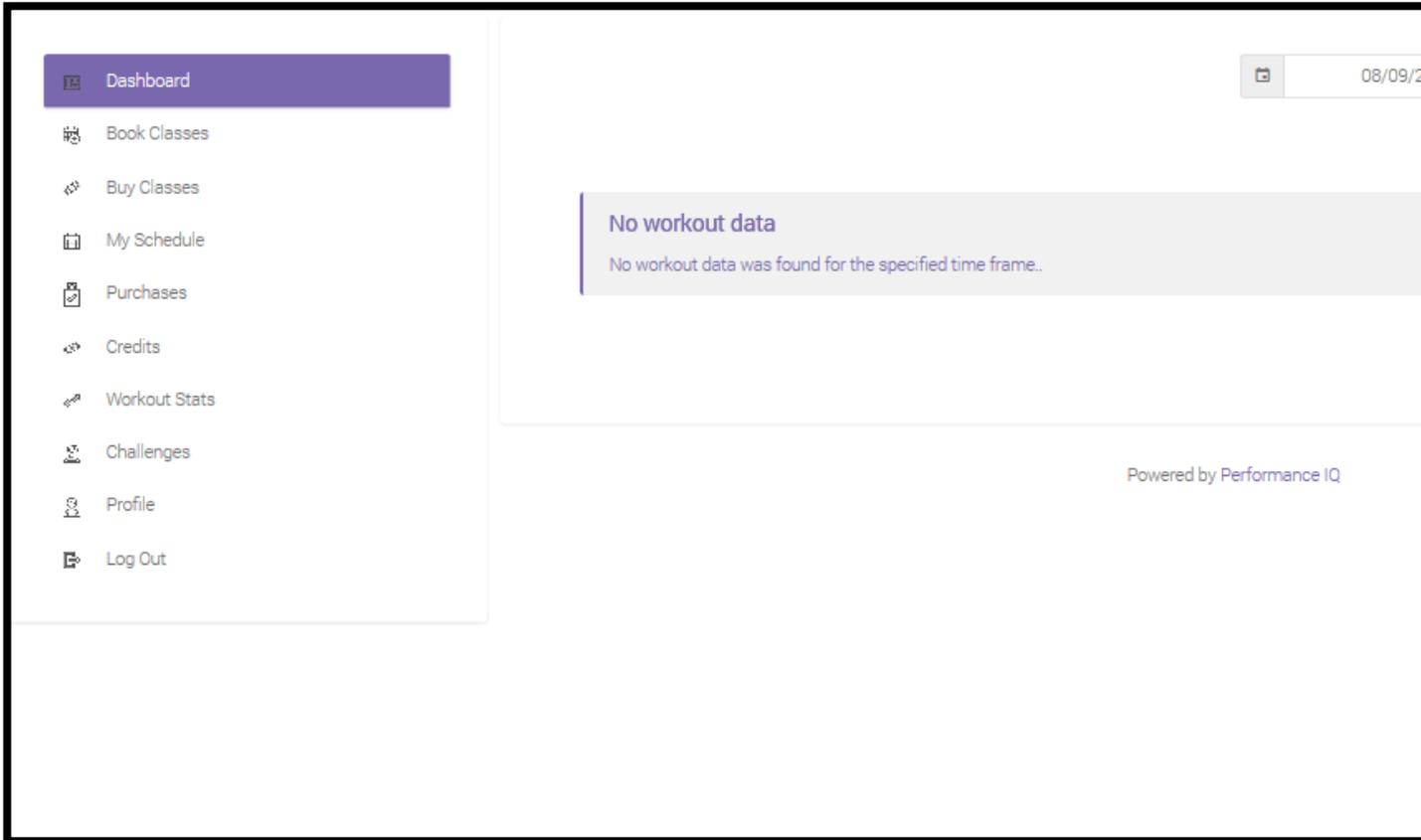
User can access their app account via the web.

**Login URL:** [stretchmed.myperformanceiq.com](https://stretchmed.myperformanceiq.com)

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

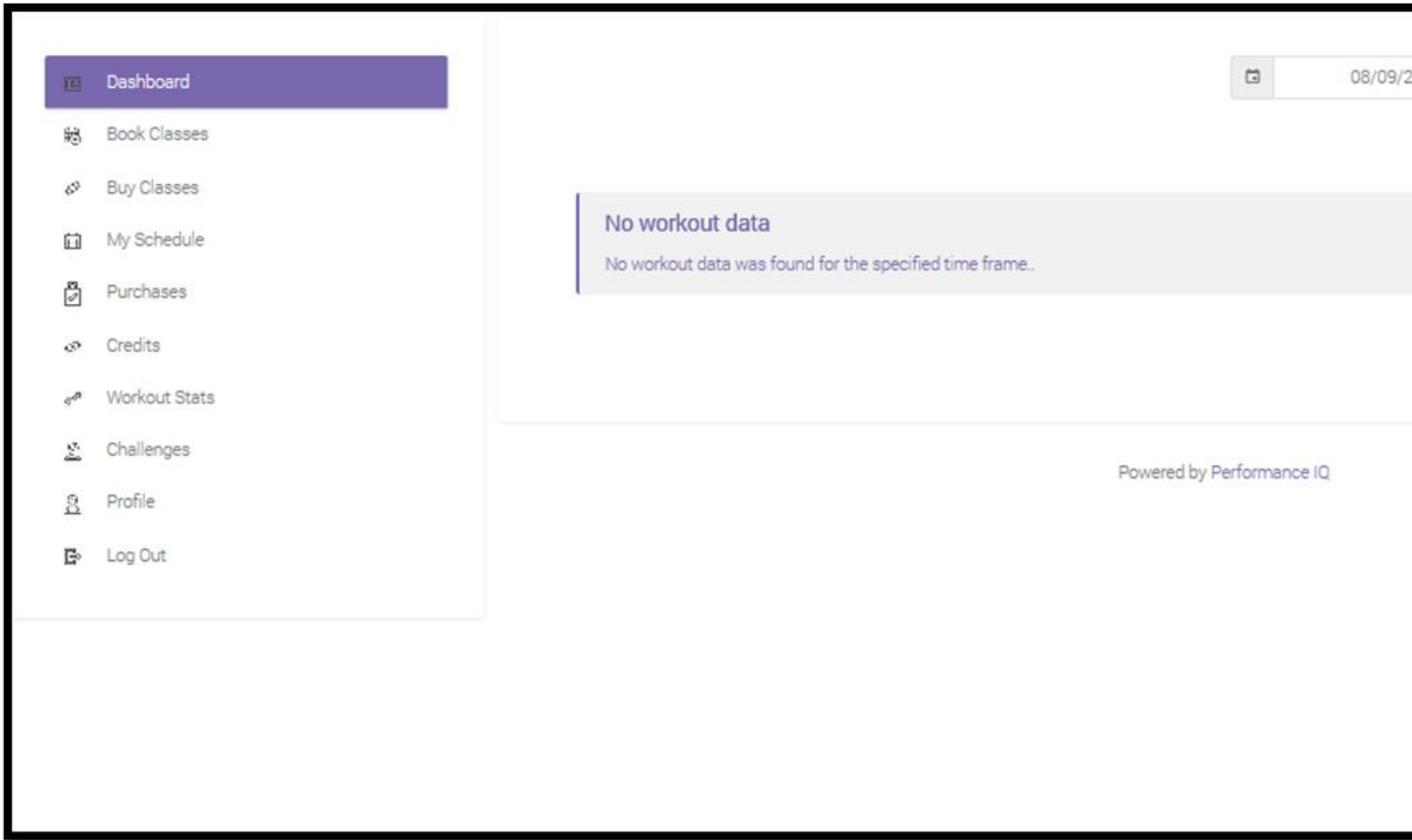
User can create an account if a new customer.

# Home Screen



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

# Dashboard



The screenshot displays a user dashboard with a purple navigation menu on the left containing the following items: Dashboard, Book Classes, Buy Classes, My Schedule, Purchases, Credits, Workout Stats, Challenges, Profile, and Log Out. The main content area features a date selector for '08/09/2' and a central message box that reads 'No workout data' followed by 'No workout data was found for the specified time frame..'. At the bottom right of the main area, it says 'Powered by Performance IQ'.

Shows workout stats.



# Book Classes

Demo Back to my account

1234 Test Way, Chesterfield, MO 63301

[Get Directions](#)

class:  Location:  Next ▶

	MON 9.7	TUE 9.8	WED 9.9	THU 9.10	FRI 9.11	SAT 9.12
Small Group 60 demo 5:00 am 60 mins.	Small Group 60 demo 5:00 am 60 mins.	Small Group 60 demo 5:00 am 60 mins.	Small Group 60 demo 5:00 am 60 mins.	Small Group 60 demo 5:00 am 60 mins.	Small Group 60 demo 5:00 am 60 mins.	Small Group 60 - 2:00 pm 60 mins.
Small Group 60 - 6:00 am 60 mins.	Small Group 60 - 6:00 am 60 mins.	Small Group 60 - 6:00 am 60 mins.	Small Group 60 - 6:00 am 60 mins.	Small Group 60 - 6:00 am 60 mins.	Small Group 60 - 6:00 am 60 mins.	
Virtual Small Group 60 - 6:30 am 60 mins.	Virtual Small Group 60 - 6:30 am 60 mins.	Virtual Small Group 60 - 6:30 am 60 mins.	Small Group 30 Dawn 8:40 am 30 mins.	Small Group 30 Dawn 8:40 am 30 mins.	Virtual Small Group 60 - 6:30 am 60 mins.	
Small Group 60 - 7:00 am 60 mins.	Small Group 60 - 7:00 am 60 mins.	Small Group 60 - 7:00 am 60 mins.	Small Group 60 - 10:00 am 60 mins.	Small Group 60 - 10:00 am 60 mins.	Small Group 60 - 7:00 am 60 mins.	
Small Group 60 - -	Small Group 60 - -	Small Group 60 - -	Small Group 60 - -	Small Group 60 - -	Small Group 60 - -	

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).

# Buy Classes

Buy Classes

Location  
Demo

<p>3 Month PIF 2X Week</p> <p><b>8</b> classes</p> <p><b>\$ 806.00</b></p> <p>→ Purchase</p>	<p>3 Month PIF 4X Week</p> <p><b>16</b> classes</p> <p><b>\$ 1,612.00</b></p> <p>→ Purchase</p>
--	---

Powered by Performance IQ

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

# Bookings

Dashboard

Book Classes

Buy Classes

**My Schedule**

Purchases

Credits

Workout Stats

Challenges

Profile

Log Out

## Bookings

Copy Excel CSV PDF

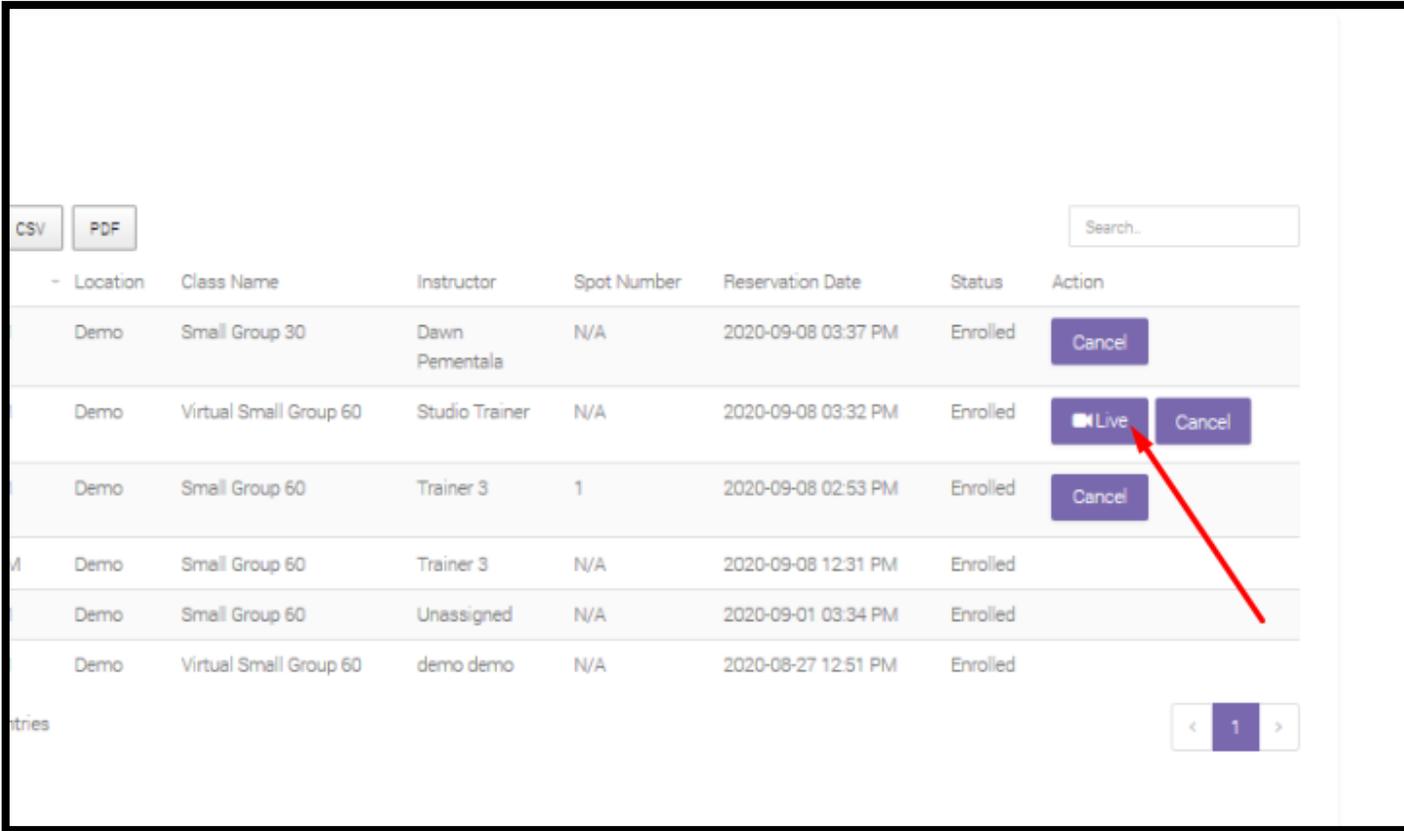
CLASS DATE	Location	Class Name	Instructor	Spot Number	Reservation Date	Status	Action
2020-09-09 8:40 AM	Demo	Small Group 30	Dawn Pementala	N/A	2020-09-08 03:37 PM	Enrolled	<a href="#">Cancel</a>
2020-09-08 5:00 PM	Demo	Virtual Small Group 60	Studio Trainer	N/A	2020-09-08 03:32 PM	Enrolled	<a href="#">Live</a> <a href="#">Cancel</a>
2020-09-08 4:00 PM	Demo	Small Group 60	Trainer 3	1	2020-09-08 02:53 PM	Enrolled	<a href="#">Cancel</a>
2020-09-08 12:35 PM	Demo	Small Group 60	Trainer 3	N/A	2020-09-08 12:31 PM	Enrolled	
2020-09-01 2:00 PM	Demo	Small Group 60	Unassigned	N/A	2020-09-01 03:34 PM	Enrolled	
2020-08-27 1:00 PM	Demo	Virtual Small Group 60	demo demo	N/A	2020-08-27 12:51 PM	Enrolled	

Showing 1 to 6 of 6 entries < 1

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).

# Launching Zoom



Location	Class Name	Instructor	Spot Number	Reservation Date	Status	Action
Demo	Small Group 30	Dawn Pementala	N/A	2020-09-08 03:37 PM	Enrolled	Cancel
Demo	Virtual Small Group 60	Studio Trainer	N/A	2020-09-08 03:32 PM	Enrolled	Live Cancel
Demo	Small Group 60	Trainer 3	1	2020-09-08 02:53 PM	Enrolled	Cancel
Demo	Small Group 60	Trainer 3	N/A	2020-09-08 12:31 PM	Enrolled	
Demo	Small Group 60	Unassigned	N/A	2020-09-01 03:34 PM	Enrolled	
Demo	Virtual Small Group 60	demo demo	N/A	2020-08-27 12:51 PM	Enrolled	

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.

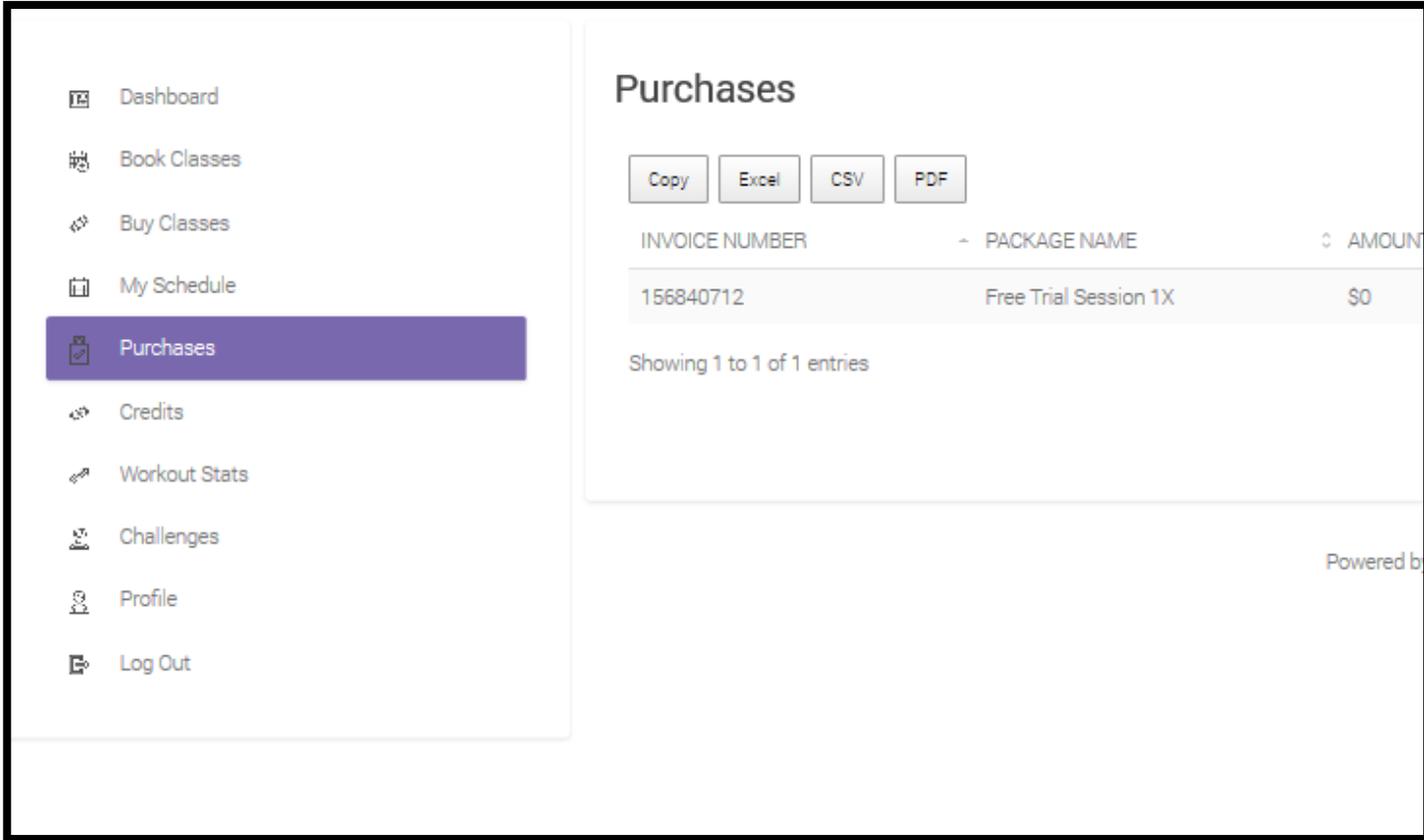
The user cannot join the Zoom meeting until it is within 15 minutes of the class start time.

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>

# Purchases



The screenshot shows a web application interface for viewing purchases. On the left is a navigation menu with the following items: Dashboard, Book Classes, Buy Classes, My Schedule, Purchases (highlighted in purple), Credits, Workout Stats, Challenges, Profile, and Log Out. The main content area is titled "Purchases" and contains four buttons: Copy, Excel, CSV, and PDF. Below the buttons is a table with three columns: INVOICE NUMBER, PACKAGE NAME, and AMOUNT. The table contains one entry: INVOICE NUMBER 156840712, PACKAGE NAME Free Trial Session 1X, and AMOUNT \$0. Below the table, it says "Showing 1 to 1 of 1 entries". At the bottom right of the main content area, it says "Powered by".

**Purchases**

Copy Excel CSV PDF

INVOICE NUMBER	PACKAGE NAME	AMOUNT
156840712	Free Trial Session 1X	\$0

Showing 1 to 1 of 1 entries

Powered by

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

# Credits

- Dashboard
- Book Classes
- Buy Classes
- My Schedule
- Purchases
- Credits**
- Workout Stats
- Challenges
- Profile
- Log Out

## Credits

[Copy](#) [Excel](#) [CSV](#) [PDF](#)

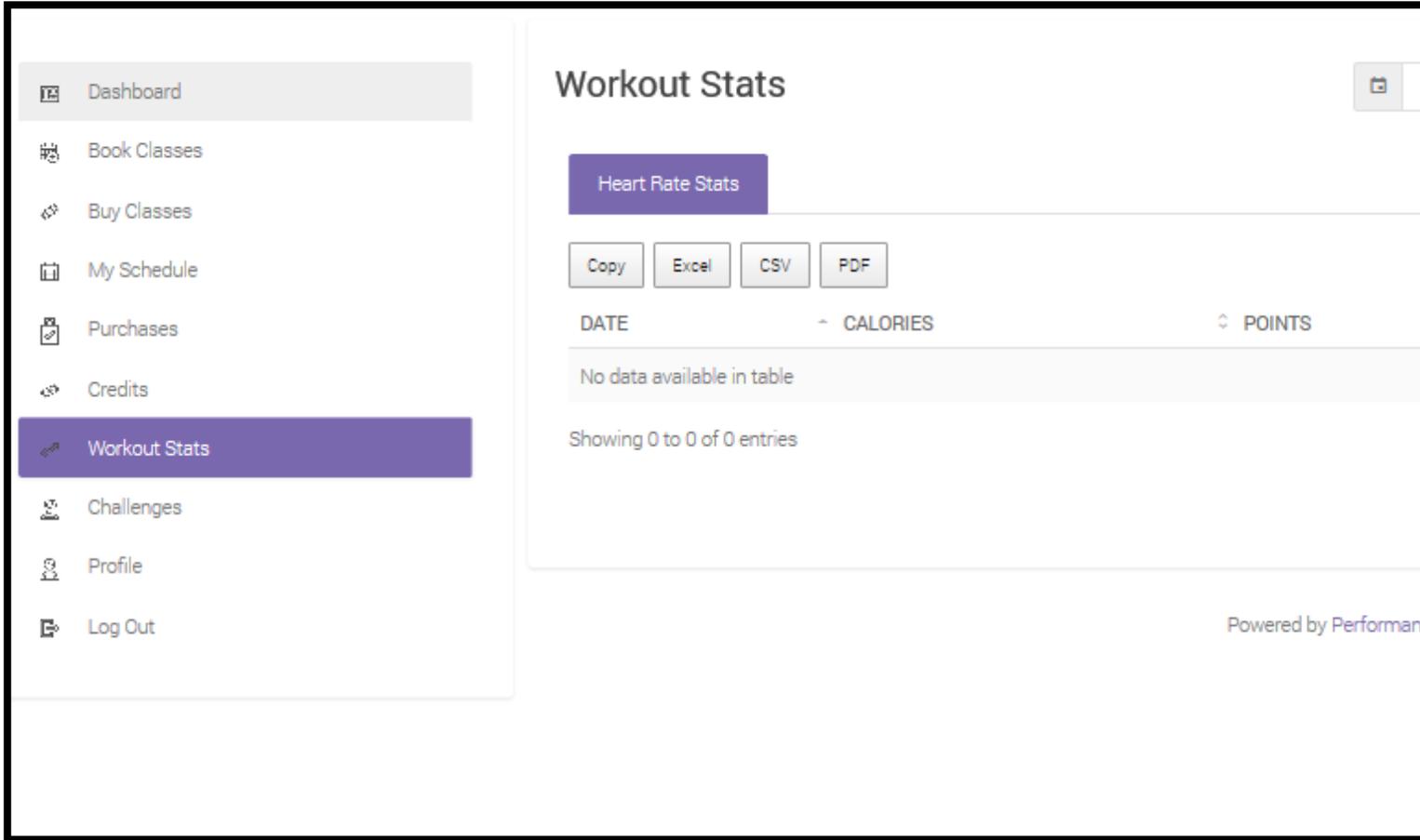
PACKAGE NAME	COUNT	REMAINING
Small Group 30	1	0

Showing 1 to 1 of 1 entries

Powered by Performance IQ

View remaining credits.

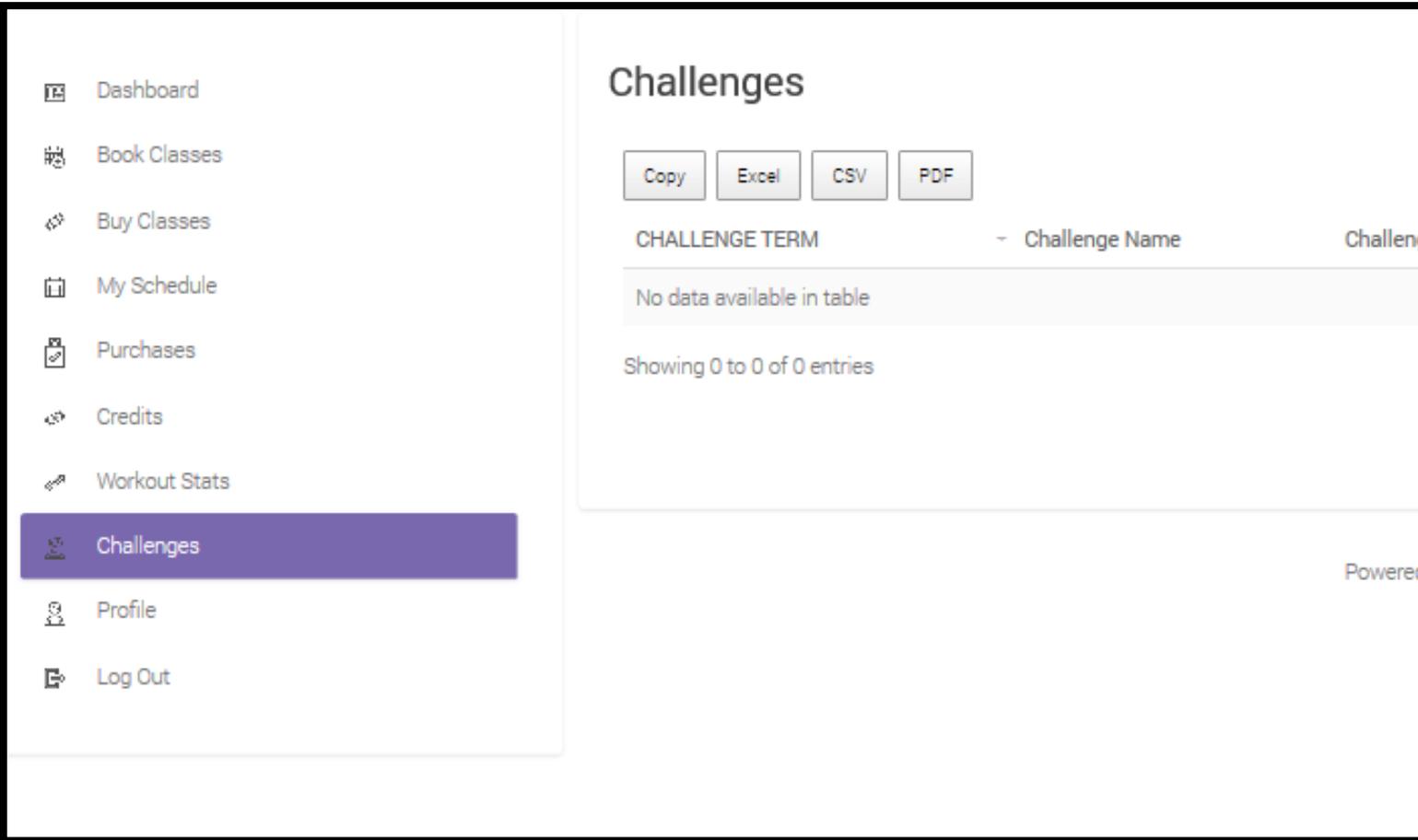
# Workout Stats



The screenshot shows a web application interface for 'Workout Stats'. On the left is a vertical navigation menu with the following items: Dashboard, Book Classes, Buy Classes, My Schedule, Purchases, Credits, Workout Stats (highlighted in purple), Challenges, Profile, and Log Out. The main content area is titled 'Workout Stats' and features a purple button labeled 'Heart Rate Stats'. Below this are four buttons for data export: 'Copy', 'Excel', 'CSV', and 'PDF'. A table header is visible with columns for 'DATE', 'CALORIES', and 'POINTS'. The table content area is currently empty, displaying the message 'No data available in table' and 'Showing 0 to 0 of 0 entries'. At the bottom right of the main content area, there is a small text element that reads 'Powered by Performance'.

View workout stats.

# Challenges



Dashboard

Book Classes

Buy Classes

My Schedule

Purchases

Credits

Workout Stats

**Challenges**

Profile

Log Out

## Challenges

Copy Excel CSV PDF

CHALLENGE TERM	Challenge Name	Challenge
No data available in table		

Showing 0 to 0 of 0 entries

Powered by

View challenge status.

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

# Profile

- Dashboard
- Book Classes
- Buy Classes
- My Schedule
- Purchases
- Credits
- Workout Stats
- Challenges
- Profile**
- Log Out

## Profile

**Info** | Payment Details | Files | App Connections | Heart Rate Monitors

**Profile**

Email: NONE@NONE.COM

New Password

New Password Confirm

First Name \*

Last Name \*

**Personal Information**

Gender \*

Male  Female  Prefer not to answer

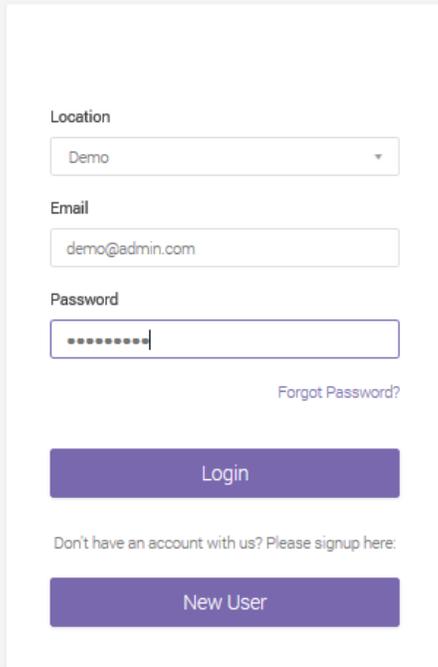
Screen Name

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



# Admin Dashboard

# What is it?



Location  
Demo

Email  
demo@admin.com

Password  
.....

[Forgot Password?](#)

Login

[Don't have an account with us? Please signup here:](#)

New User

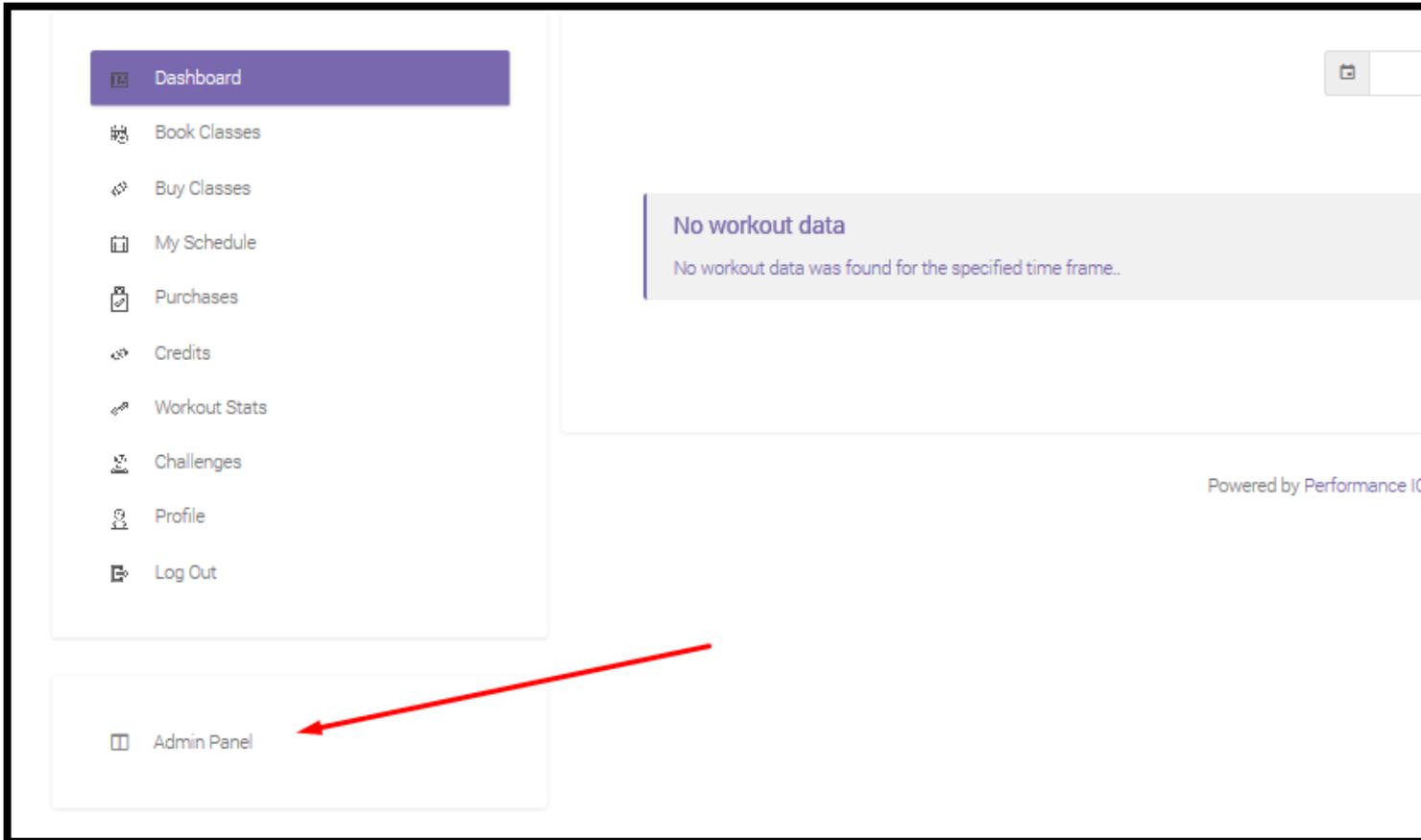
Powered by Performance IQ

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.

# Logging In

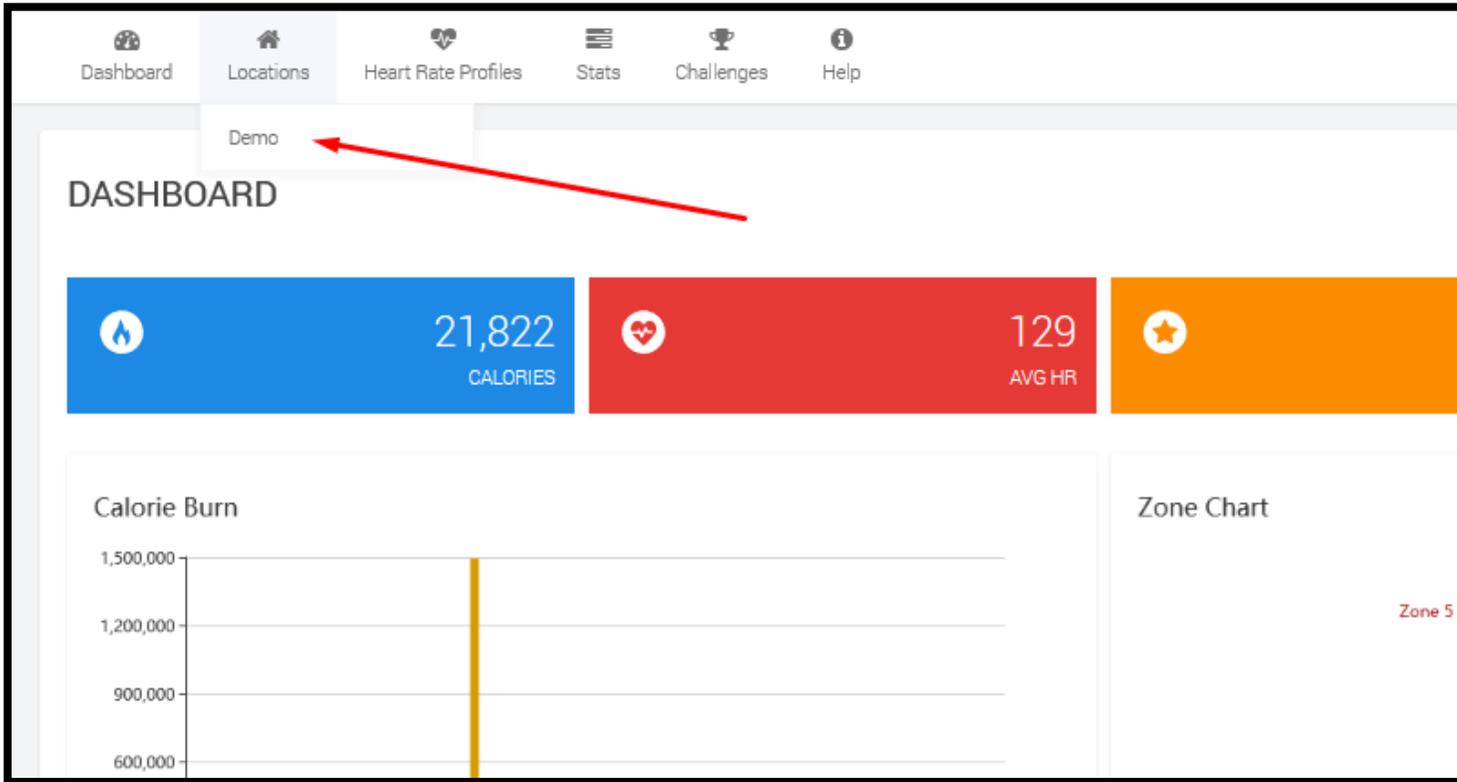


**Login URL:** [stretchmed.myperformanceiq.com](https://stretchmed.myperformanceiq.com)

Use admin account login credentials.

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

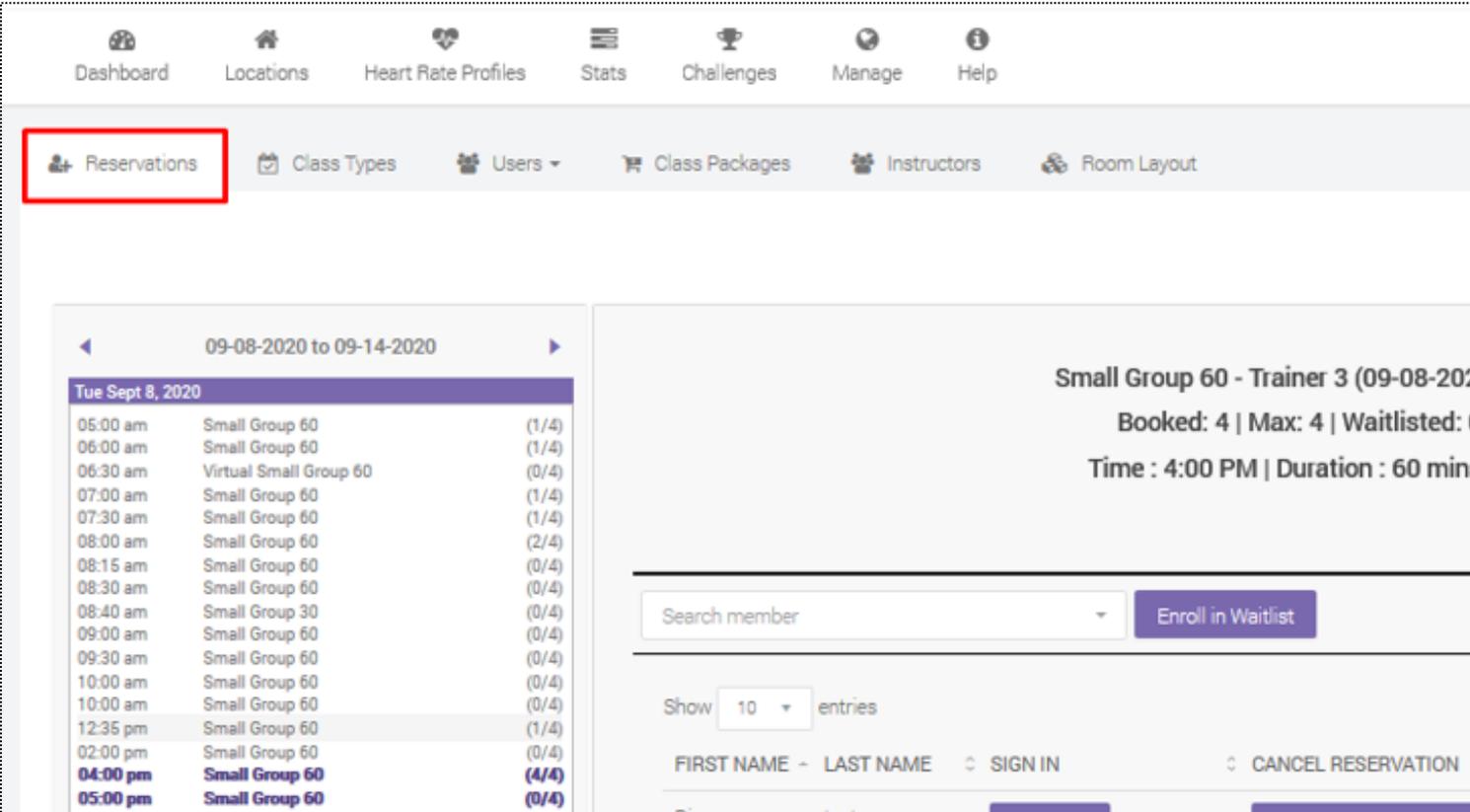
# Logging In



After clicking 'Admin Panel', a new tab will open.

Hover over 'Locations' and click on your location.

# Reservation



Dashboard Locations Heart Rate Profiles Stats Challenges Manage Help

**Reservations** Class Types Users Class Packages Instructors Room Layout

09-08-2020 to 09-14-2020

Tue Sept 8, 2020

05:00 am	Small Group 60	(1/4)
06:00 am	Small Group 60	(1/4)
06:30 am	Virtual Small Group 60	(0/4)
07:00 am	Small Group 60	(1/4)
07:30 am	Small Group 60	(1/4)
08:00 am	Small Group 60	(2/4)
08:15 am	Small Group 60	(0/4)
08:30 am	Small Group 60	(0/4)
08:40 am	Small Group 30	(0/4)
09:00 am	Small Group 60	(0/4)
09:30 am	Small Group 60	(0/4)
10:00 am	Small Group 60	(0/4)
10:00 am	Small Group 60	(0/4)
12:35 pm	Small Group 60	(1/4)
02:00 pm	Small Group 60	(0/4)
<b>04:00 pm</b>	<b>Small Group 60</b>	<b>(4/4)</b>
<b>05:00 pm</b>	<b>Small Group 60</b>	<b>(0/4)</b>

Small Group 60 - Trainer 3 (09-08-2020)  
Booked: 4 | Max: 4 | Waitlisted: 0  
Time : 4:00 PM | Duration : 60 mins

Search member

Show 10 entries

FIRST NAME - LAST NAME

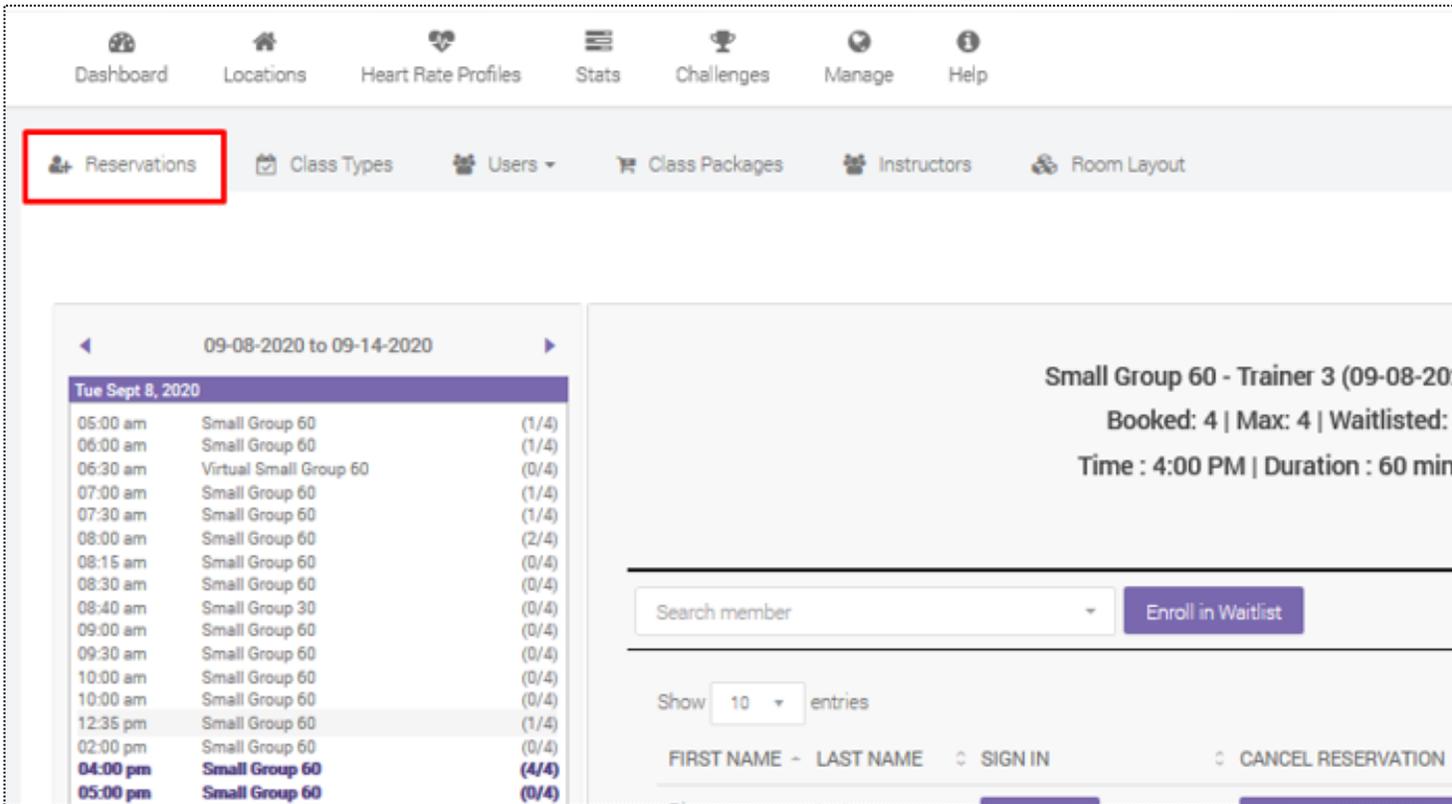
Shows class schedule, class details, and attendees.

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



The screenshot shows the ClubReady Reservations page. The top navigation bar includes Dashboard, Locations, Heart Rate Profiles, Stats, Challenges, Manage, and Help. Below this is a secondary navigation bar with Reservations (highlighted with a red box), Class Types, Users, Class Packages, Instructors, and Room Layout. The main content area displays a calendar for the week of 09-08-2020 to 09-14-2020. A table lists reservations for Tuesday, September 8, 2020, with columns for time, class name, and status. The 04:00 pm reservation for 'Small Group 60' is highlighted in blue and shows a status of (4/4). To the right, details for 'Small Group 60 - Trainer 3 (09-08-2020)' are shown, including 'Booked: 4 | Max: 4 | Waitlisted: 0' and 'Time: 4:00 PM | Duration: 60 mins'. Below this is a search bar for members and an 'Enroll in Waitlist' button. At the bottom, there is a 'Show 10 entries' dropdown and a table header with columns for FIRST NAME, LAST NAME, SIGN IN, and CANCEL RESERVATION.

Time	Class Name	Status
05:00 am	Small Group 60	(1/4)
06:00 am	Small Group 60	(1/4)
06:30 am	Virtual Small Group 60	(0/4)
07:00 am	Small Group 60	(1/4)
07:30 am	Small Group 60	(1/4)
08:00 am	Small Group 60	(2/4)
08:15 am	Small Group 60	(0/4)
08:30 am	Small Group 60	(0/4)
08:40 am	Small Group 30	(0/4)
09:00 am	Small Group 60	(0/4)
09:30 am	Small Group 60	(0/4)
10:00 am	Small Group 60	(0/4)
10:00 am	Small Group 60	(0/4)
12:35 pm	Small Group 60	(1/4)
02:00 pm	Small Group 60	(0/4)
<b>04:00 pm</b>	<b>Small Group 60</b>	<b>(4/4)</b>
05:00 pm	Small Group 60	(0/4)

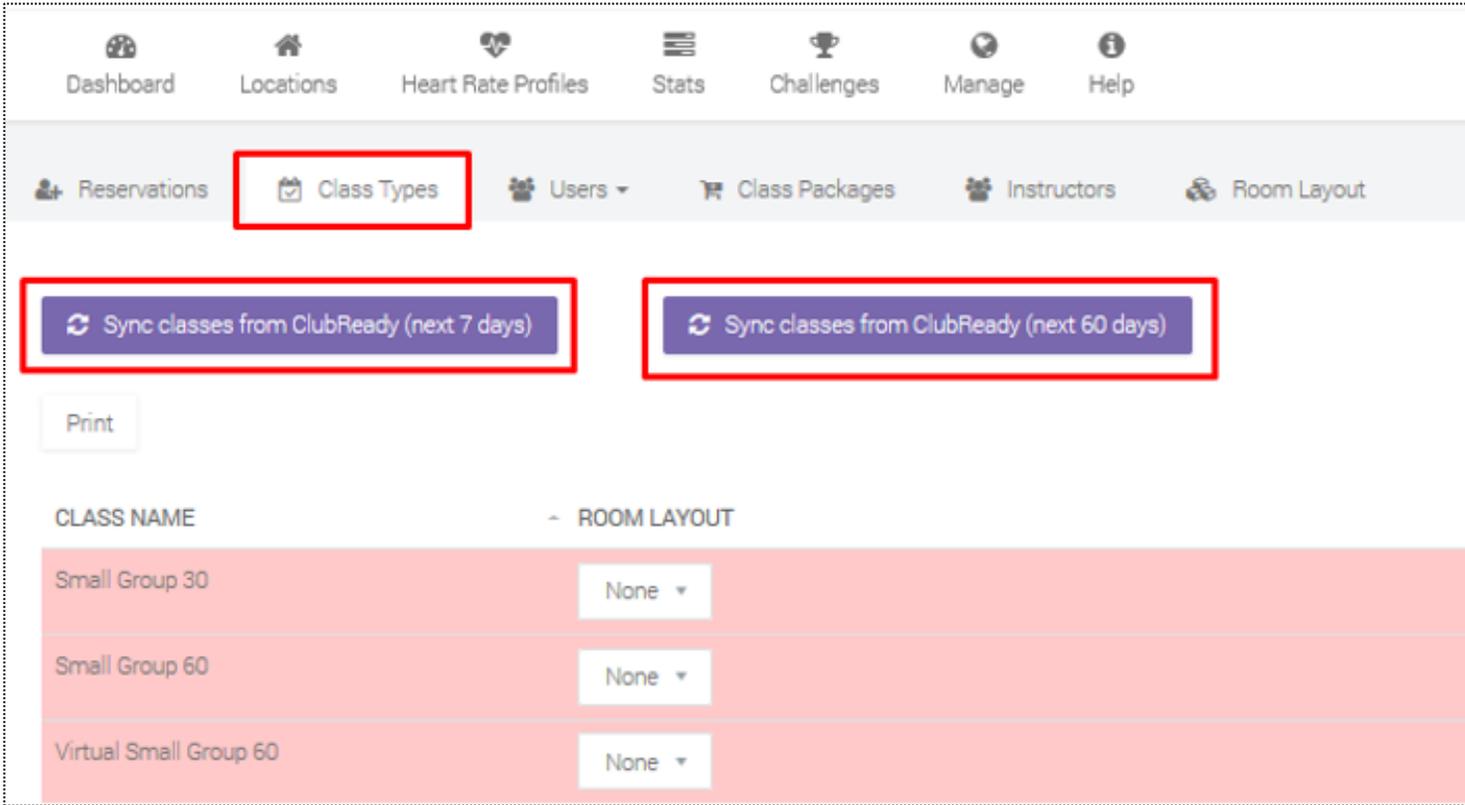
If a Zoom link has been entered for the class in ClubReady, it will appear here for the instructor to click and begin the meeting.

This link can also be accessed and selected through ClubReady.

**Virtual Meeting Links:**

<https://www.clubready.com/wiki/WK38651337395>

# Class Types



Dashboard Locations Heart Rate Profiles Stats Challenges Manage Help

Reservations **Class Types** Users Class Packages Instructors Room Layout

Sync classes from ClubReady (next 7 days) Sync classes from ClubReady (next 60 days)

Print

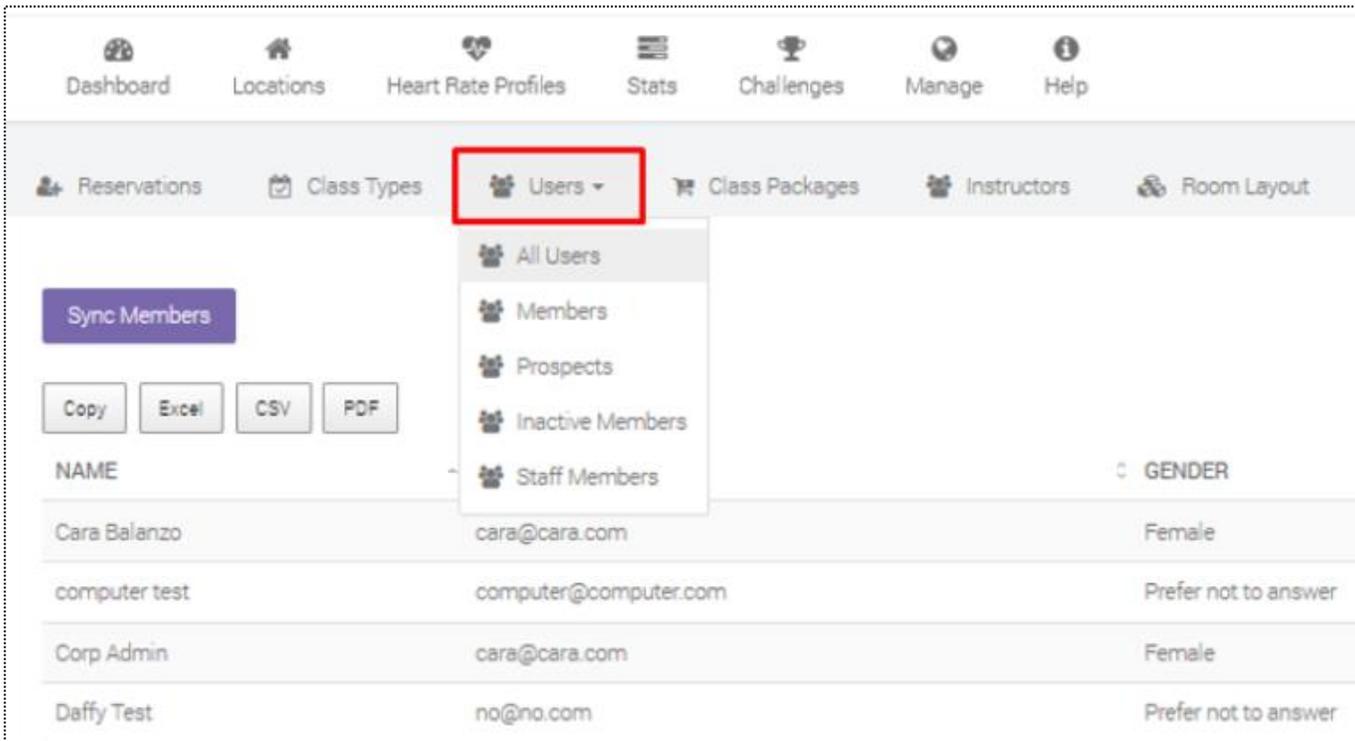
CLASS NAME	ROOM LAYOUT
Small Group 30	None ▾
Small Group 60	None ▾
Virtual Small Group 60	None ▾

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



Dashboard Locations Heart Rate Profiles Stats Challenges Manage Help

Reservations Class Types **Users** Class Packages Instructors Room Layout

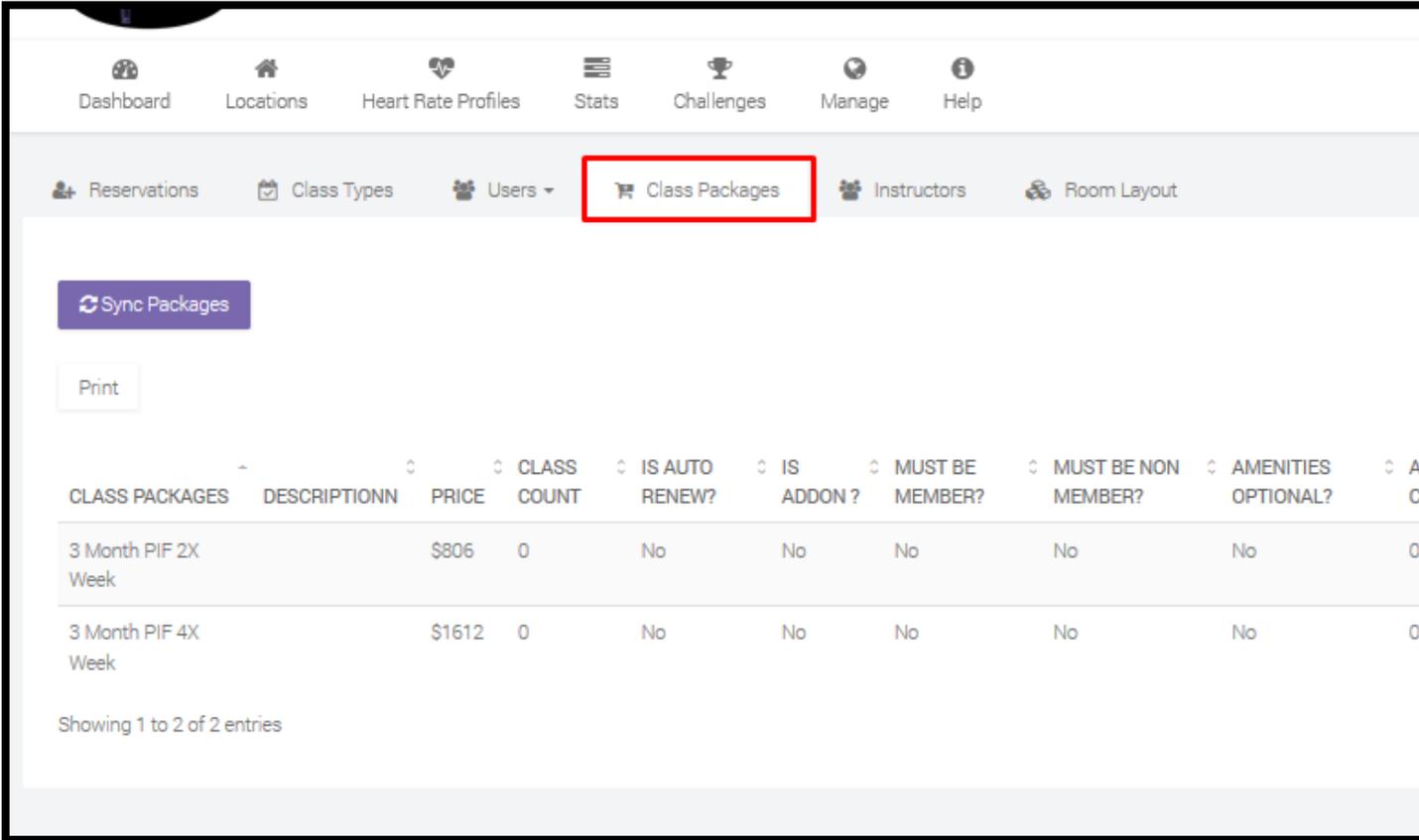
Sync Members

Copy Excel CSV PDF

NAME		GENDER
Cara Balanzo	cara@cara.com	Female
computer test	computer@computer.com	Prefer not to answer
Corp Admin	cara@cara.com	Female
Daffy Test	no@no.com	Prefer not to answer

- 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



Dashboard Locations Heart Rate Profiles Stats Challenges Manage Help

Reservations Class Types Users **Class Packages** Instructors Room Layout

Sync Packages

Print

CLASS PACKAGES	DESCRIPTION	PRICE	CLASS COUNT	IS AUTO RENEW?	IS ADDON?	MUST BE MEMBER?	MUST BE NON MEMBER?	AMENITIES OPTIONAL?	A
3 Month PIF 2X Week		\$806	0	No	No	No	No	No	0
3 Month PIF 4X Week		\$1612	0	No	No	No	No	No	0

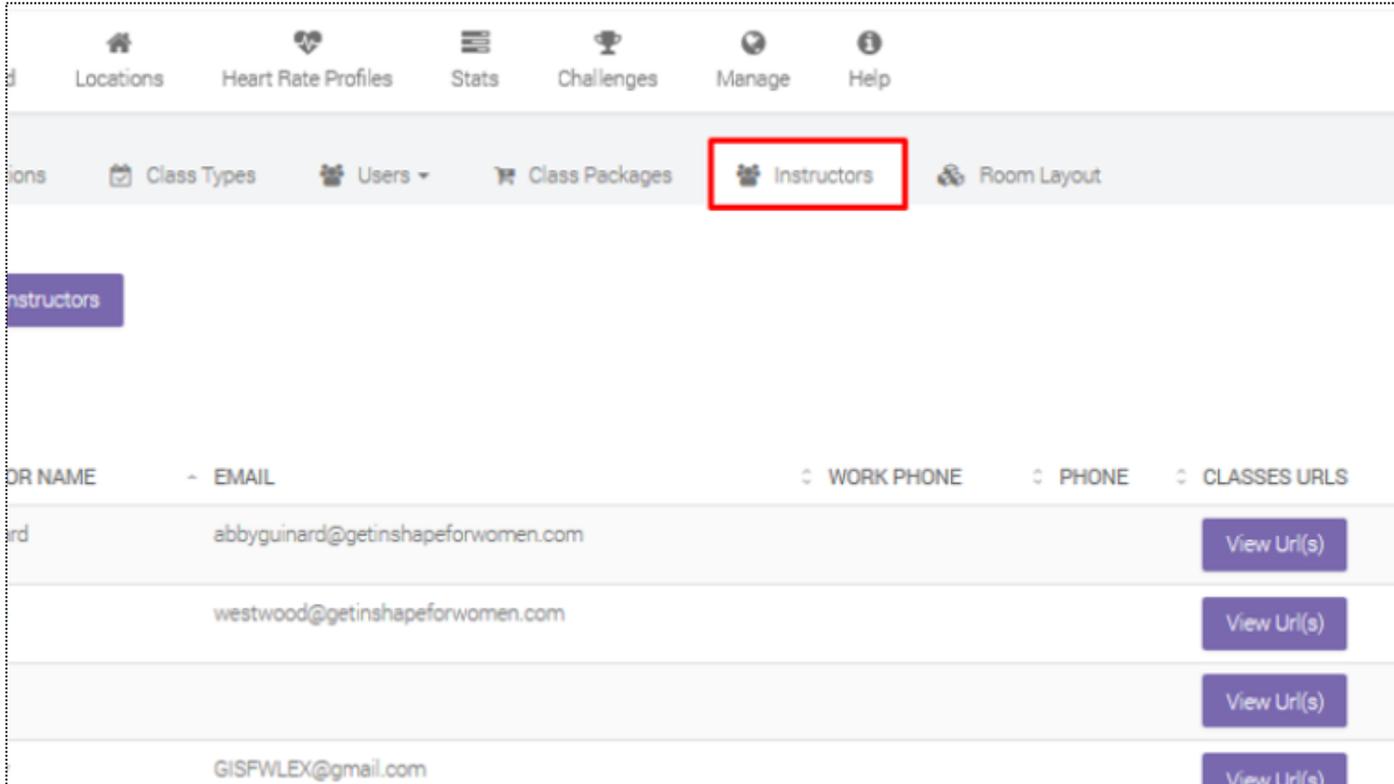
Showing 1 to 2 of 2 entries

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>

# Class Instructors

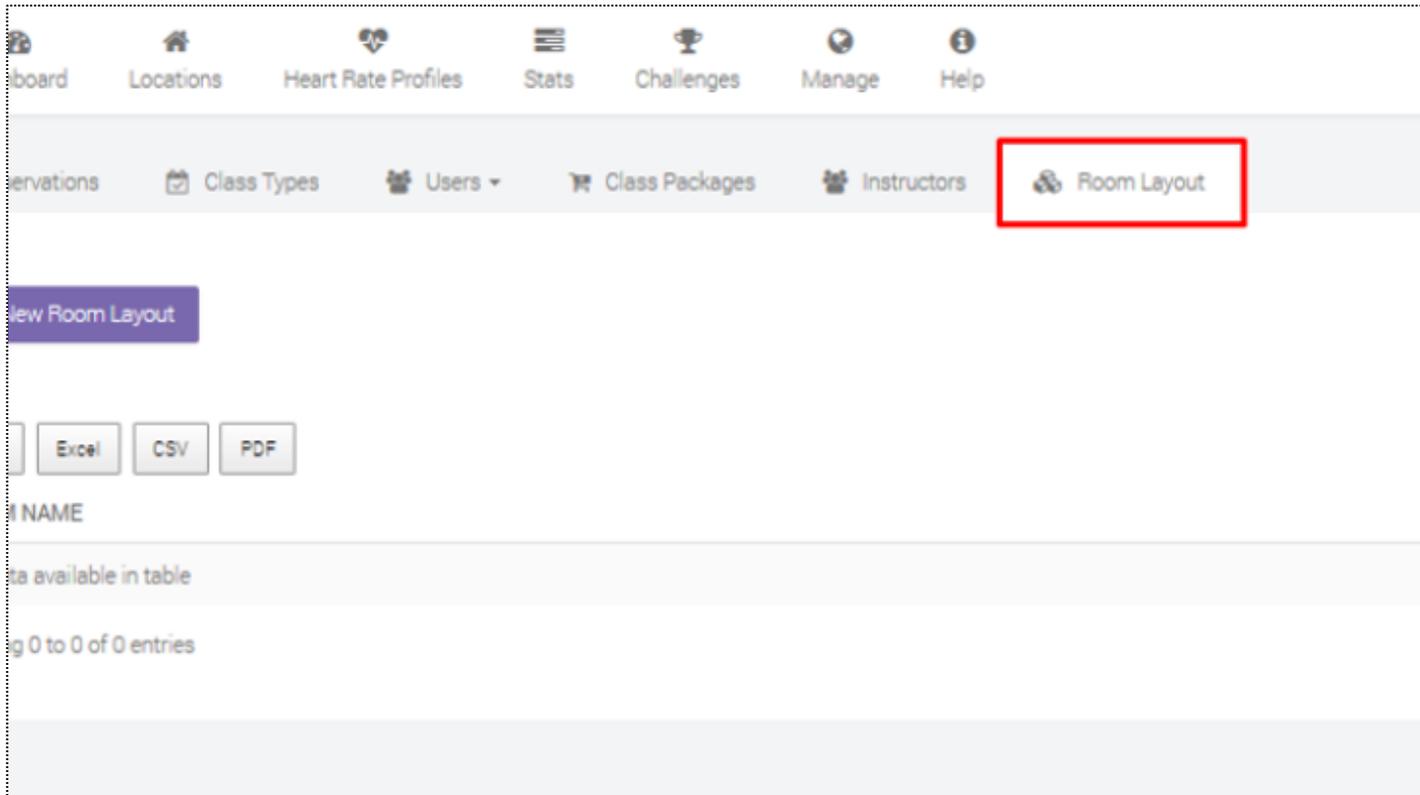


INSTRUCTOR NAME	EMAIL	WORK PHONE	PHONE	CLASSES URLS
Abby Guinard	abbyguinard@getinshapeforwomen.com			<a href="#">View Url(s)</a>
Westwood	westwood@getinshapeforwomen.com			<a href="#">View Url(s)</a>
				<a href="#">View Url(s)</a>
	GISFWLEX@gmail.com			<a href="#">View Url(s)</a>

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 max attendees limit in the class type settings.

**Creating A Room Layout:**

<https://www.clubready.com/wiki/WK39824202471>

# User View

Small Group 60  
Weight Training and Cardio  
Instructor : Unassigned  
Date : 2020-09-09  
Time : 2:00 PM | Duration : 60 mins.

1 2 3 4  
5 6 7  
8 9 10 11

< Back Pick Your Spot

Sep, 9th

Small Group 60  
10:00 AM - 11:00 AM

1 2 3 4  
5 6 7  
8 9 10 11

← →  
Slide to view more spots

CONFIRM 3 SPOT

Menu Dashboard Book Classes My Schedule



Check In Kiosk

# Class Check In Kiosk

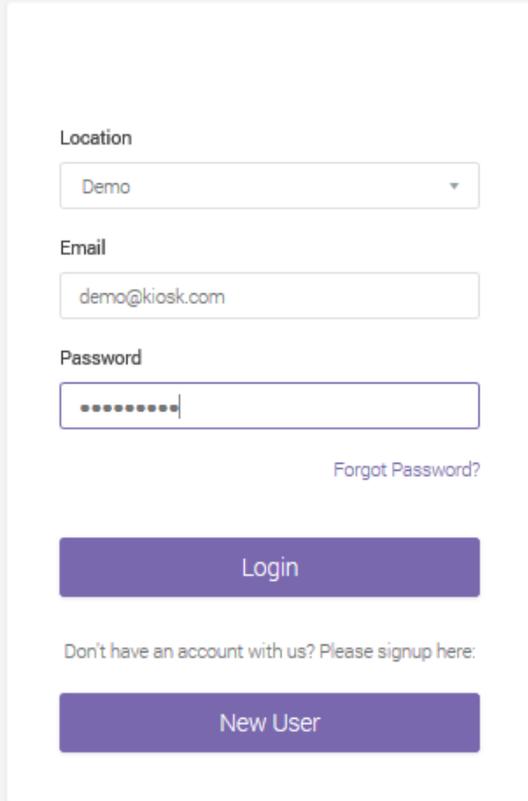
Location

	<b>Small Group 60</b> Trainer 3 4:00 PM - 5:00 PM	Starting in 49 mins
	<b>Small Group 60</b> Diane Test 5:00 PM - 6:00 PM	Starting in 1 hrs 49 mins
	<b>Small Group 60</b> Trainer 3 6:00 PM - 7:00 PM	Starting in 2 hrs 49 mins
	<b>Small Group 60</b> Trainer 3 7:00 PM - 8:00 PM	Starting in 3 hrs 49 mins

The PerformancelQ 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.

# Logging In



The screenshot shows a login form with the following fields and elements:

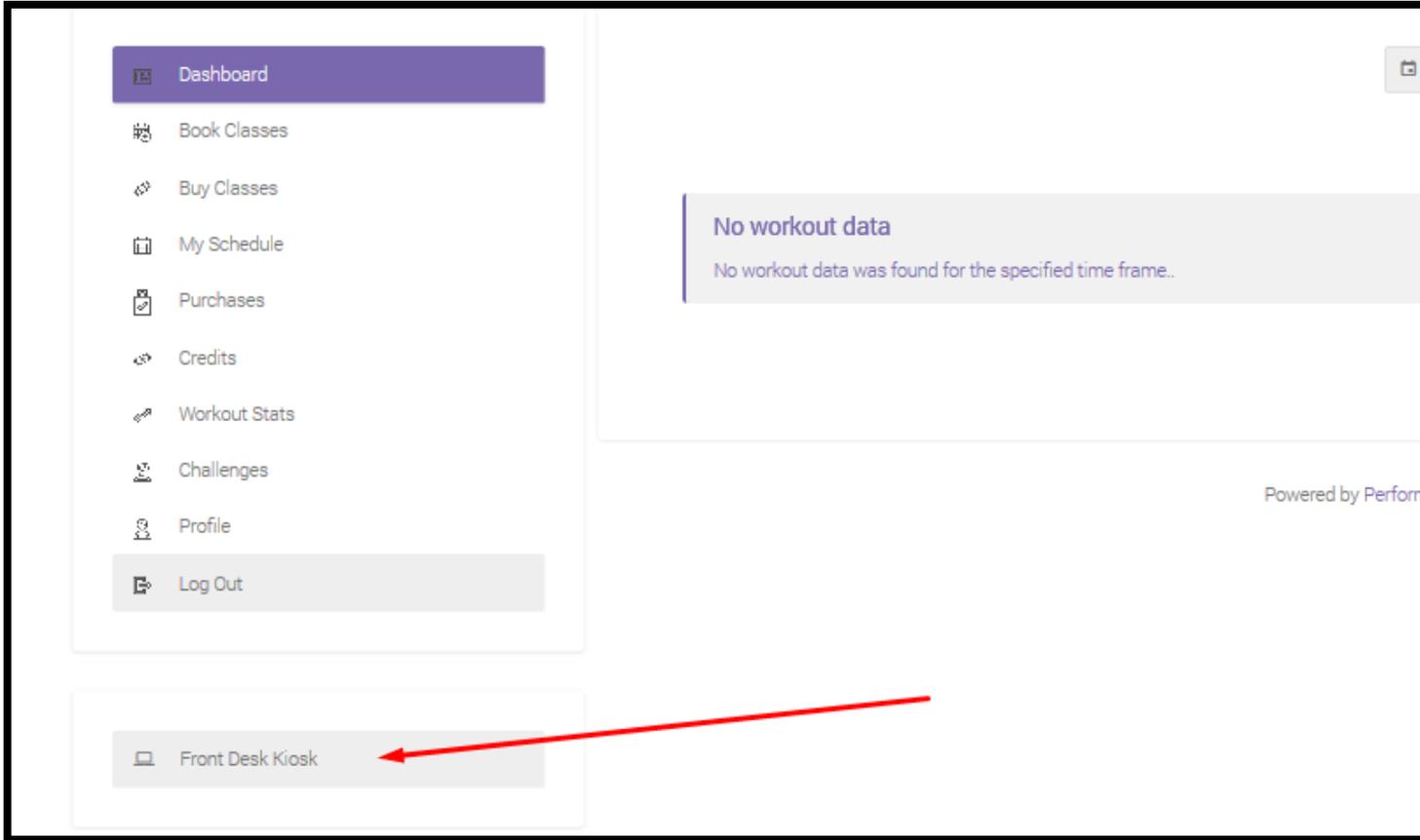
- Location:** A dropdown menu with "Demo" selected.
- Email:** A text input field containing "demo@kiosk.com".
- Password:** A text input field with masked characters ".....".
- Forgot Password?:** A link located below the password field.
- Login:** A purple button.
- Don't have an account with us? Please signup here:** A text prompt.
- New User:** A purple button.

Powered by Performance IQ

Use the same login URL:  
[stretchmed.myperformanceiq.com](https://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

Location

	<b>Small Group 60</b> Trainer 3 4:00 PM - 5:00 PM	Starting in 49 mins
	<b>Small Group 60</b> Diane Test 5:00 PM - 6:00 PM	Starting in 1 hrs 49 mins
	<b>Small Group 60</b> Trainer 3 6:00 PM - 7:00 PM	Starting in 2 hrs 49 mins
	<b>Small Group 60</b> Trainer 3 7:00 PM - 8:00 PM	Starting in 3 hrs 49 mins

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

# Checking In

New Booking

Back to Class List

## Small Group 60 w/ Trainer 3 @ 4:00 PM

Name	
Diane test	<a href="#">Check In</a>
Test Prospect	<a href="#">Check In</a>
Tom test	<a href="#">Check In</a>
Virginia Test	<a href="#">Check In</a>

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

[New Booking](#) [Back to Class List](#)

Small Group 60 w/ Trainer 3 @ 4:00 PM

Name	
Diane test	<a href="#">Check In</a>
Test Prospect	<a href="#">Check In</a>
Tom test	<a href="#">Check In</a>
Virginia Test	<a href="#">Check In</a>

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

Class Settings | **Booking Settings** | Instructors | Booking Flags | Categories

Attendees Must Book A Place In Class?  Yes

Max Attendees Per Class  People

Allow Customer Wait List For This Class?  Yes

Lead Time Required For Wait List Bookings 1 Hours

**Booking Policy**  Lagrange Booking Policy

Customers Can Book Online  Yes

Automatically Log Bookings?  Use Global Default Settings

Allow Booking Quick Log  Yes

Allow Cross Club Booking?  Yes

Class Credits Required?  Yes

Certain Membership Types Don't Need Class Credits?  Yes  No

**These Membership Types Don't Need Class Credits**

<input type="checkbox"/> 1 Month EFT (Corp)	<input type="checkbox"/> 3XWeek (Corp)	<input type="checkbox"/> Free Week Trial (Corp)
<input type="checkbox"/> 1 Month Only 3XWeek (50% Off) (Corp)	<input type="checkbox"/> 4XWeek (Corp)	<input type="checkbox"/> MBO Inactive (Corp)
<input type="checkbox"/> 1 Month PIF (Corp)	<input type="checkbox"/> 6 Month EFT (Corp)	<input type="checkbox"/> PIF 1XWK (Corp)
<input checked="" type="checkbox"/> 12 Month EFT (Corp)	<input type="checkbox"/> 6 Month PIF (Corp)	<input type="checkbox"/> PIF 6/WKS (Corp)
<input type="checkbox"/> 12 Month PIF (Corp)	<input type="checkbox"/> 6 Weeks (Corp)	<input checked="" type="checkbox"/> Unlimited (Corp)
<input type="checkbox"/> 2XWeek (Corp)	<input type="checkbox"/> 6 Weeks (50% off) (Corp)	<input type="checkbox"/> virtual (Corp)
<input type="checkbox"/> 3 Month EFT (Corp)	<input type="checkbox"/> 7 day Jump Start (Corp)	
<input type="checkbox"/> 3 Month PIF (Corp)	<input type="checkbox"/> Free Trial Session (Corp)	

Members With Certain Amenities Don't Need Class Credits?  Yes  No

Memberships With These Amenities Don't Need Class Credits

<input checked="" type="checkbox"/> Unlimited (Corp)	<input checked="" type="checkbox"/> Virtual Unlimited (Corp)
--	--

Setup > Scheduling > Classes/Group > Booking Settings

Check these class type settings:

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

# 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

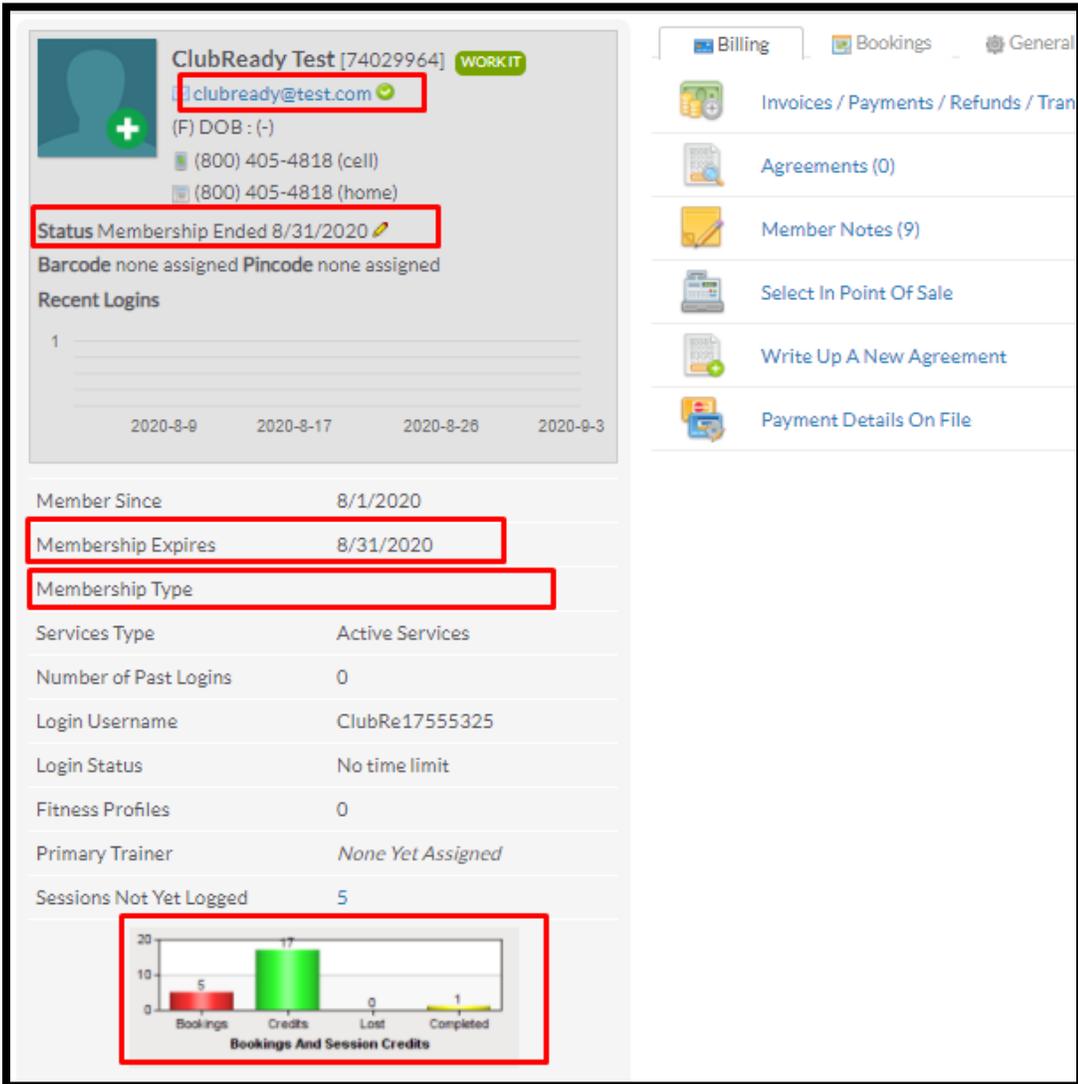
### Cancellation Policy Description:

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



**ClubReady Test [74029964]** WORK IT

[clubready@test.com](mailto:clubready@test.com) ✓  
(F) DOB : (-)  
(800) 405-4818 (cell)  
(800) 405-4818 (home)

**Status** Membership Ended 8/31/2020 ✎  
Barcode none assigned Pincode none assigned

**Recent Logins**

1				
	2020-8-9	2020-8-17	2020-8-26	2020-9-3

Member Since 8/1/2020  
Membership Expires 8/31/2020  
Membership Type  
Services Type Active Services  
Number of Past Logins 0  
Login Username ClubRe17555325  
Login Status No time limit  
Fitness Profiles 0  
Primary Trainer None Yet Assigned  
Sessions Not Yet Logged 5

**Bookings And Session Credits**

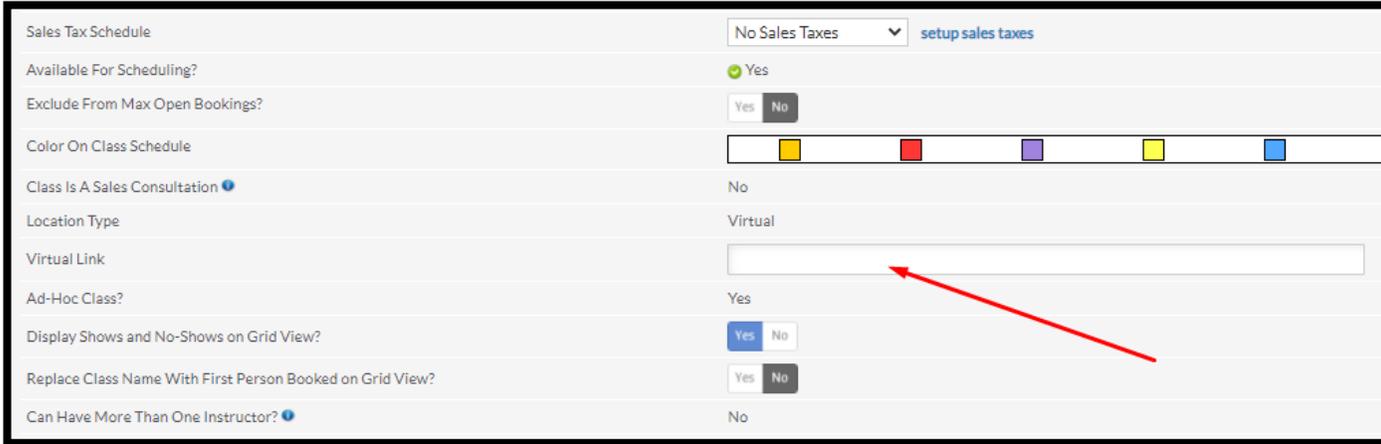
Bookings	5
Credits	17
Lost	0
Completed	1

Navigation: Billing, Bookings, General

- Invoices / Payments / Refunds / Tran
- Agreements (0)
- Member Notes (9)
- Select In Point Of Sale
- Write Up A New Agreement
- Payment Details On File

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

# Setting Up Zoom in ClubReady



Sales Tax Schedule: No Sales Taxes [setup sales taxes](#)

Available For Scheduling?  Yes

Exclude From Max Open Bookings?  Yes  No

Color On Class Schedule: 

Class Is A Sales Consultation  No

Location Type: Virtual

Virtual Link:

Ad-Hoc Class?  Yes

Display Shows and No-Shows on Grid View?  Yes  No

Replace Class Name With First Person Booked on Grid View?  Yes  No

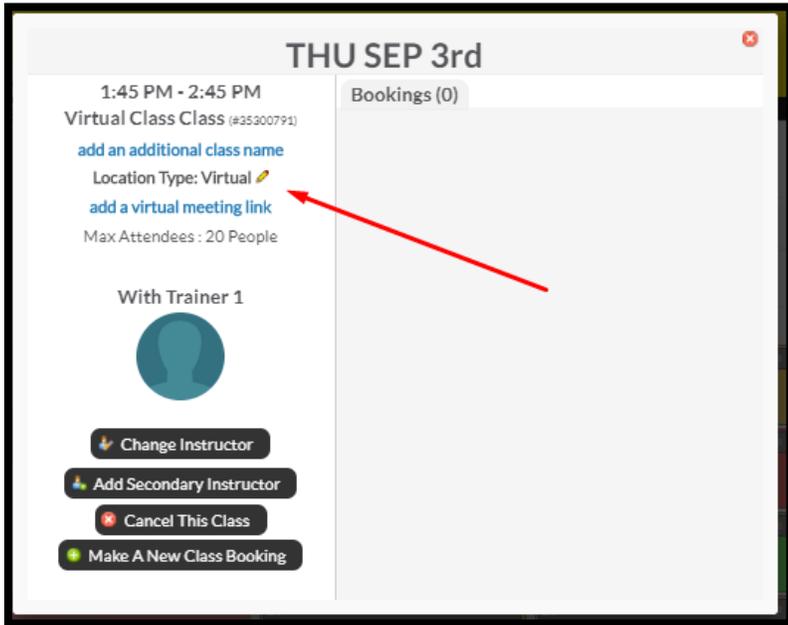
Can Have More Than One Instructor?  No

A red arrow points to the Virtual Link input field.

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.



THU SEP 3rd

1:45 PM - 2:45 PM

Virtual Class Class (#35300791)

[add an additional class name](#)

Location Type: Virtual 

[add a virtual meeting link](#)

Max Attendees: 20 People

With Trainer 1



[Change Instructor](#)

[Add Secondary Instructor](#)

[Cancel This Class](#)

[Make A New Class Booking](#)

Bookings (0)

A red arrow points to the "add a virtual meeting link" text.

# Knowledgebase Articles

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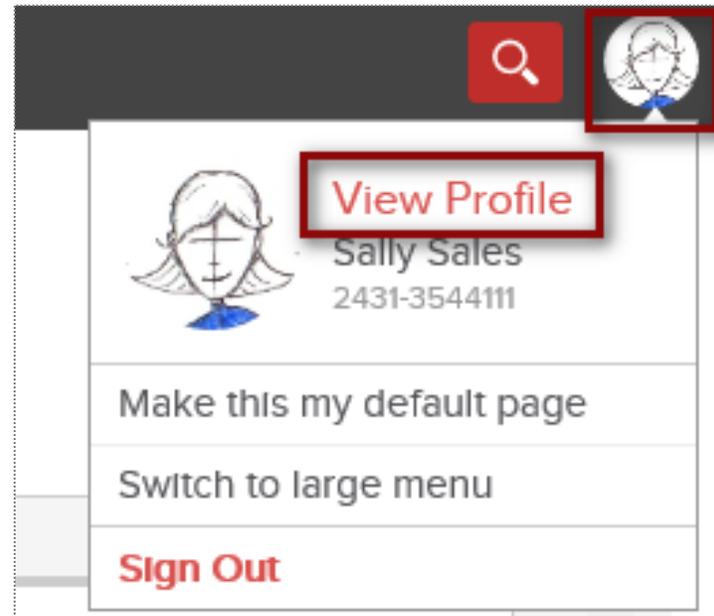
- Virtual Meeting Links: <https://www.clubready.com/wiki/WK38651337395>
- Edit A Customer Profile (where to reset the user's password): <https://www.clubready.com/wiki/WK26067540987>
- Merge A Duplicate Profile: <https://www.clubready.com/wiki/WK19128952393>
- Delete A Member / Customer / Prospect: <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

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

# 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](mailto: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](#)

  [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

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**

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**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



**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.

**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
<a href="#">4670167</a>	Charlie Clubowner	CRTraining Membership Site	29	32	<a href="#">1,772</a>	\$12.75	\$376.55
<a href="#">4711678</a>	Frontdesk Felicity	CRTraining Membership Site	10	35	<a href="#">635</a>	\$18.00	\$190.50
<a href="#">9618414</a>	John Cena	CRTraining Membership Site	9	42	<a href="#">582</a>	\$25.00	\$242.50
<a href="#">18351031</a>	Mike Trout	CRTraining Membership Site	14	30	<a href="#">870</a>	\$17.00	\$246.50
			62	139	3,859	\$72.75	\$1,056.05

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



Training & Support

# Key Reports

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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>

# Key Reports

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Learn > Knowledge

Complete Guide To Product Reports:

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

Complete Guide To Communication Reports:

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

Complete Guide To Misc. Reports:

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



# Training: ClubReady Foundations Webinar

Learn > Training

Thursday, October 8, 2020

10:00 AM EST

All Club Staff

Chain: StretchMed

StretchMED - ClubReady Foundations for Staff Members (Simulated) System Admin • [view details](#)

This class covers the basics of ClubReady for Staff, Trainers and Managers.

webinar URL <https://attendee.gotowebinar.com/rt/3733557067470855437>



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



## StretchMED - ClubReady Foundations for Staff Members (Simulated)

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

Thu, Oct 15, 2020 9:00 AM - 10:00 AM CDT

[Show in My Time Zone](#)

This class covers the basics of ClubReady for Staff, Trainers and Managers.

This includes:

- Prospect Management
- Work It
- Agreement Write Up
- Scheduling



\*Required field

First Name\*

Last Name\*

Email Address\*

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

[Register](#)

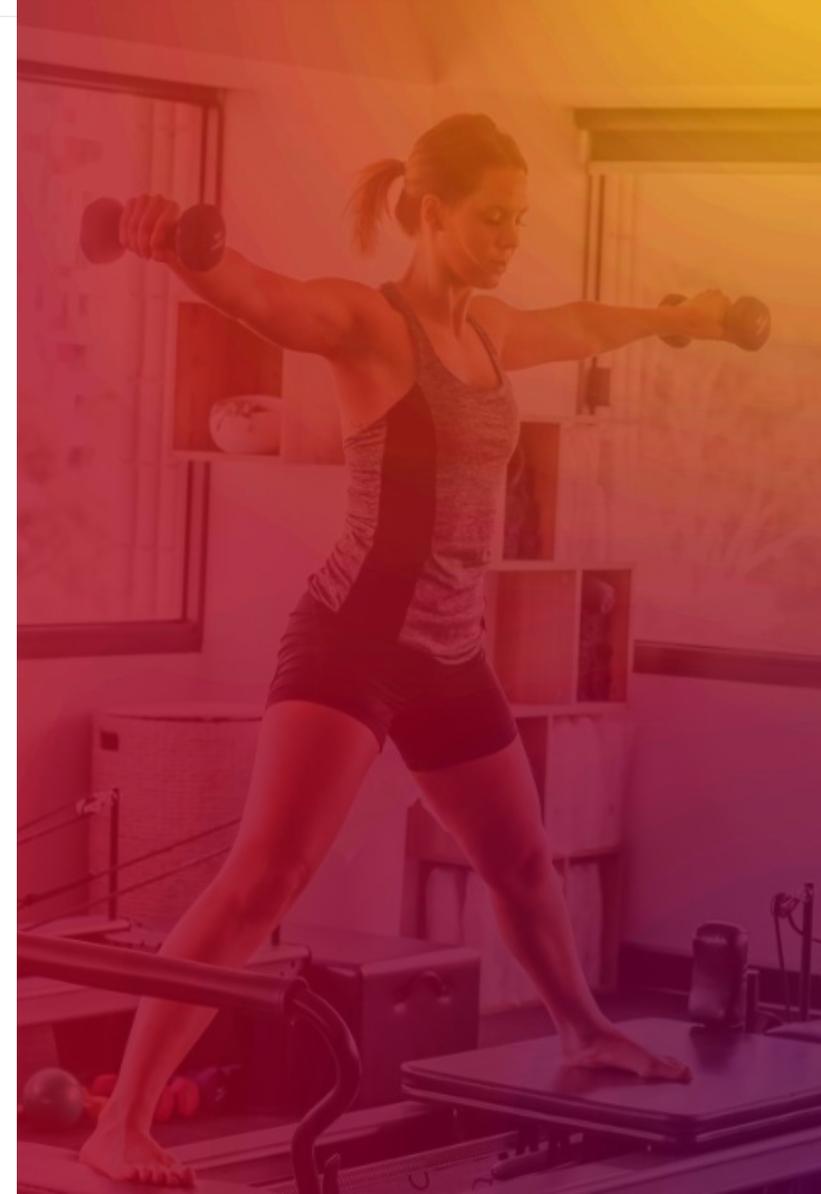
Complete the registration information and you will receive an email confirmation you have been registered to attend.

# Training Home Page

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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 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!

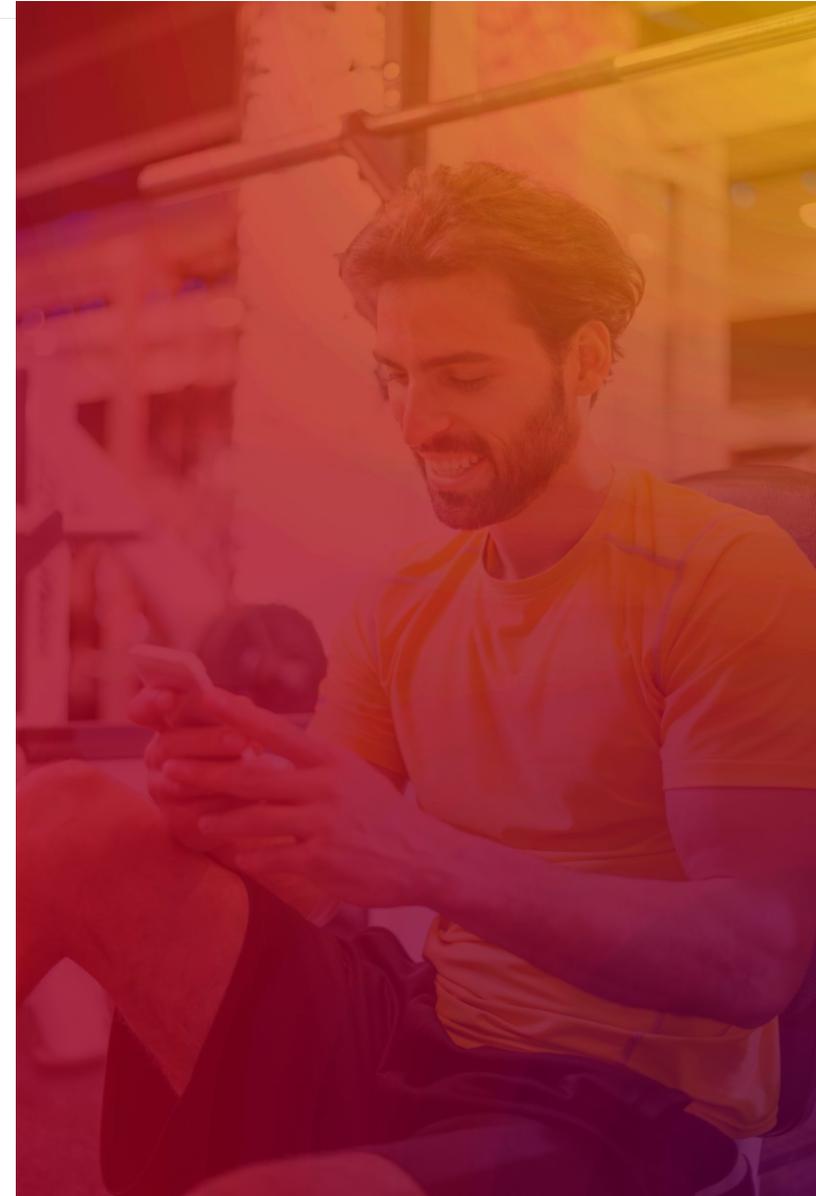
The following codes will automatically register you for the appropriate Foundations Learning Path:

- 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/>

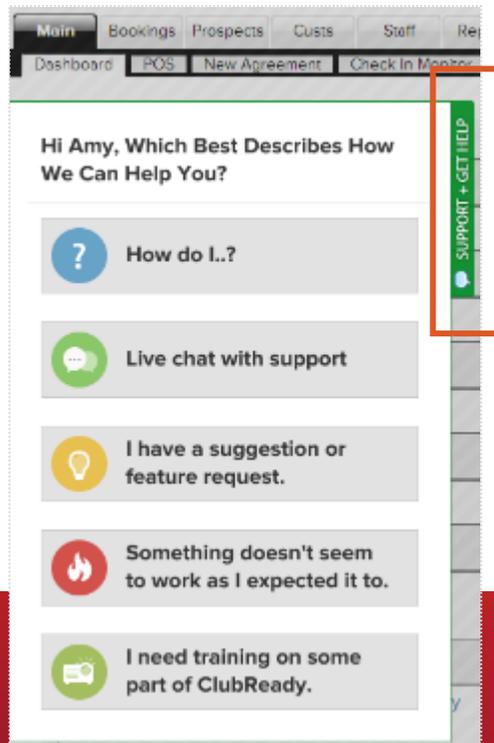
You will then receive an email that creates your login and password at <https://cruniversity.litmos.com>

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.

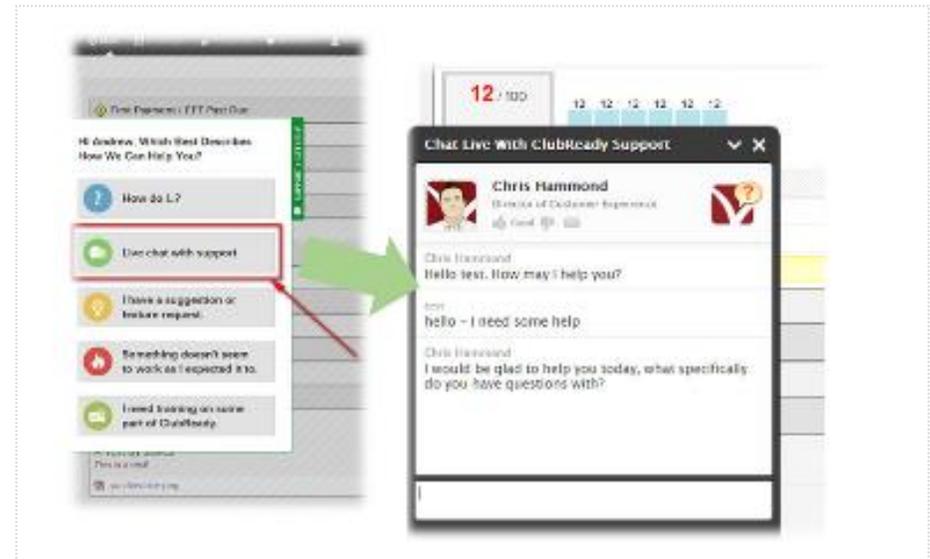


# Support + Get Help

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](mailto: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!

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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

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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](mailto:support@clubready.com)