ClubReady Foundations User Guide

TITLE Boxing Club Demo Site

www.clubready.com/cl/titleboxingclub.asp

Username: Franchisee-test

Password: Boxing.1

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TITLE BOXING CLUB

Hardware

Hardware: Required

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

Windows 7-10 PC with Internet Access:
Intel Core 2 Duo or better processor
4-8 GB of RAM
At least six USB ports (USB port expanders can be added)
Microsoft Office or Open Office (version that includes Word & Excel)
Internet Explorer 11

Tablet(s): (depending on club volume you'll need 1-4 tablets)

- *Andriod or Apple (wifi required)*
- *Apps to download*
  - *ClubReady Class Kiosk (member class check-in)*
  - *ClubReady Presentation Viewer (User friendly tool to enroll memberships, complete guest registrations, and much more)*

Credit Card Reader:
Manufacturer: Magtek, Inc.
Model Name: CENTURION
Part Number: mag-21073145
Security Level: 2

Hand Held Scanner:

- *Existing CLeaR hand held will work*

Hardware: Optional & Removal

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

Electronic Signature Pad:
Manufacturer: Topaz Systems
Model Name: Topaz SigLite Backlit LCD 1x5
Part Number: T-LBK460-HSB-R

Receipt Printer:
Manufacturer: Star Micronics
Model Name: TSP100
Part Number: TSP143U

Cash Drawer:
Manufacturer: LOGIC CONTROLS
Model Name: Titan Jr (Dark Grey)
Part Number: log-cr1000gy

Hardware that will no longer be of use

- *3rd party merchant cc machine no longer required & is required to be removed from club*
- *Orbital scanner (for membership card check-ins) to be removed; replaced with tablet*

Lead Management

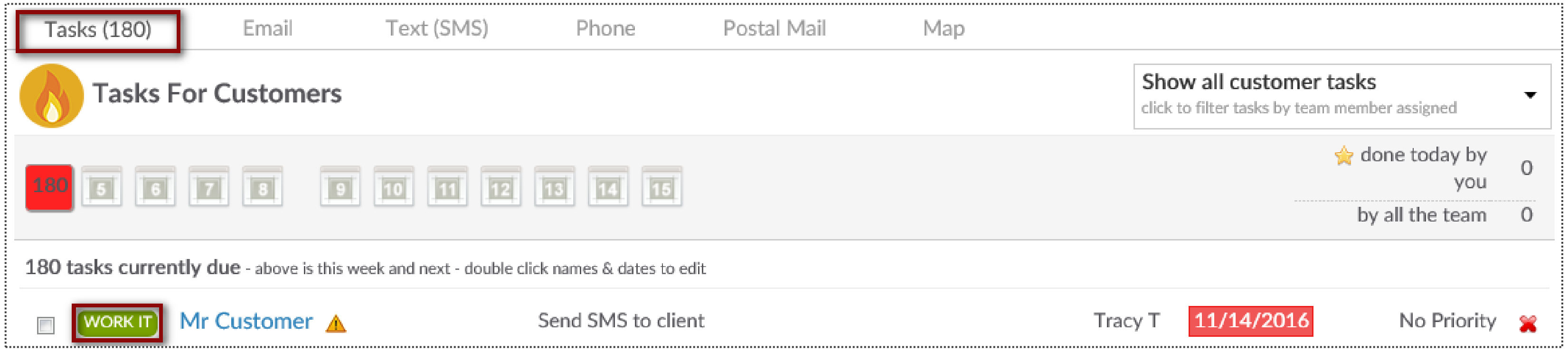
Working a Task (Follow Up, Next Action)

Prospects/Members tab > Tasks

Locate all tasks assigned to you under **Prospects/Members** > **Tasks** -or- from **Main** > **Lead Management** > Dropdown to assigned staff member or All. The list will display the prospect/member name, the task that needs to be completed, staff assigned to the task, due date and priority.

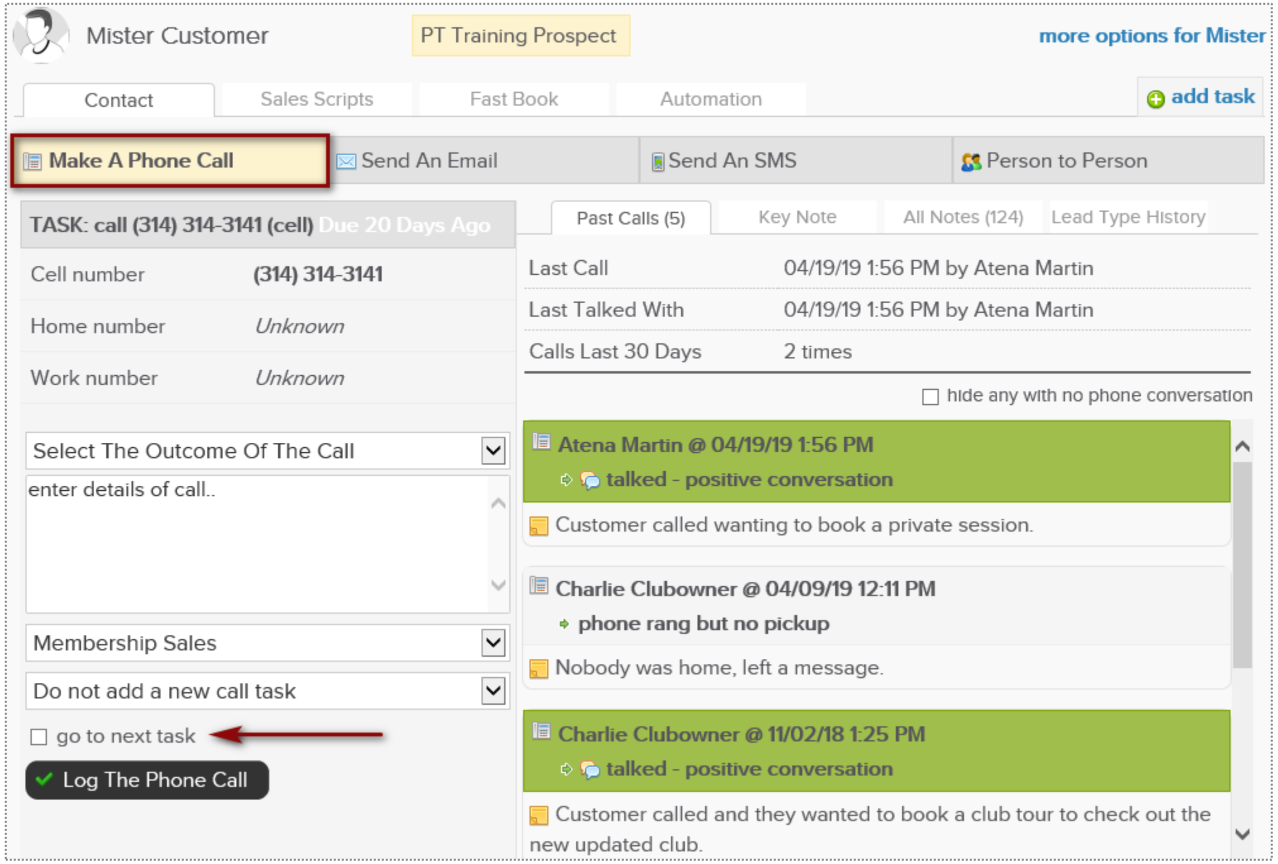
Click the **Work It** to work on a specific task; Activity column will notify type of contact required. Once completed, make sure to select the check box next to the Work It button.

NOTE: Task will auto populate based of life cycle and lead type. A task date can be edited or set by a team member.



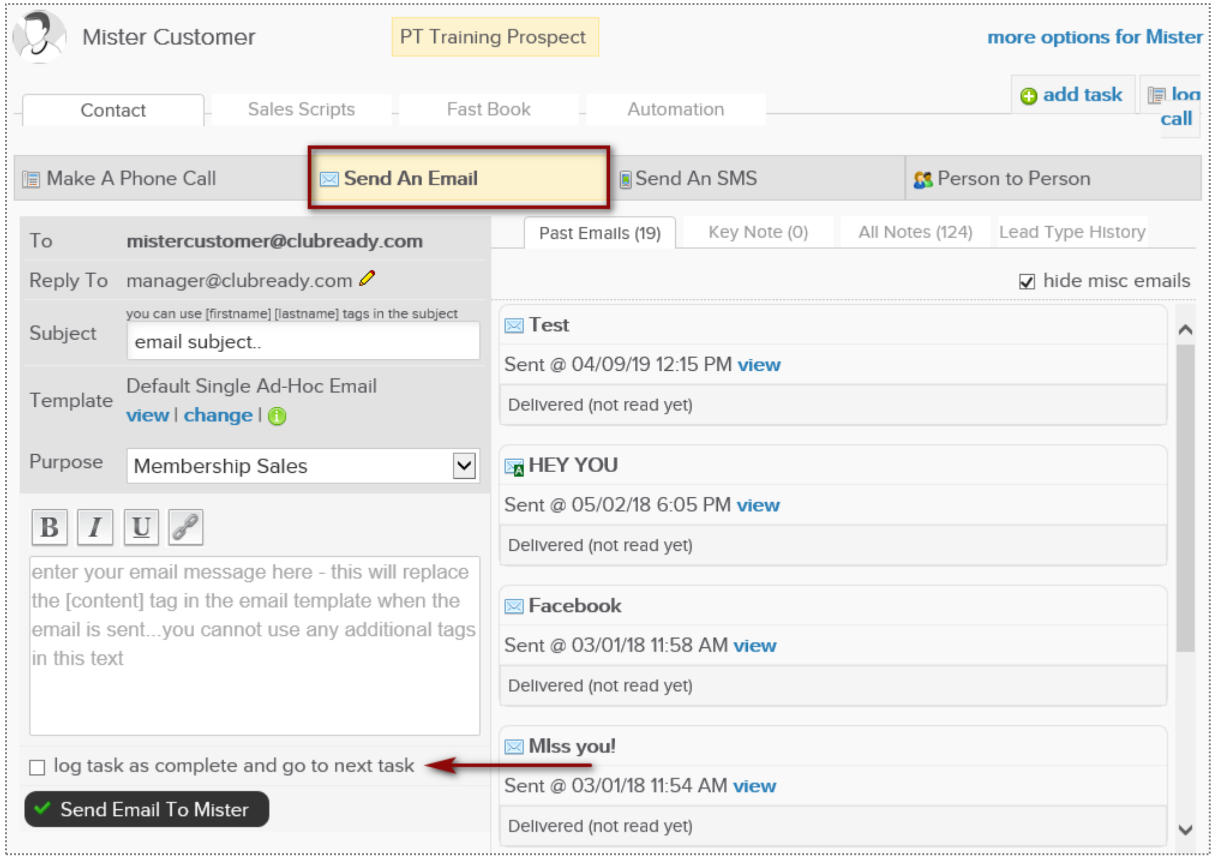
Work It: Phone Calls

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



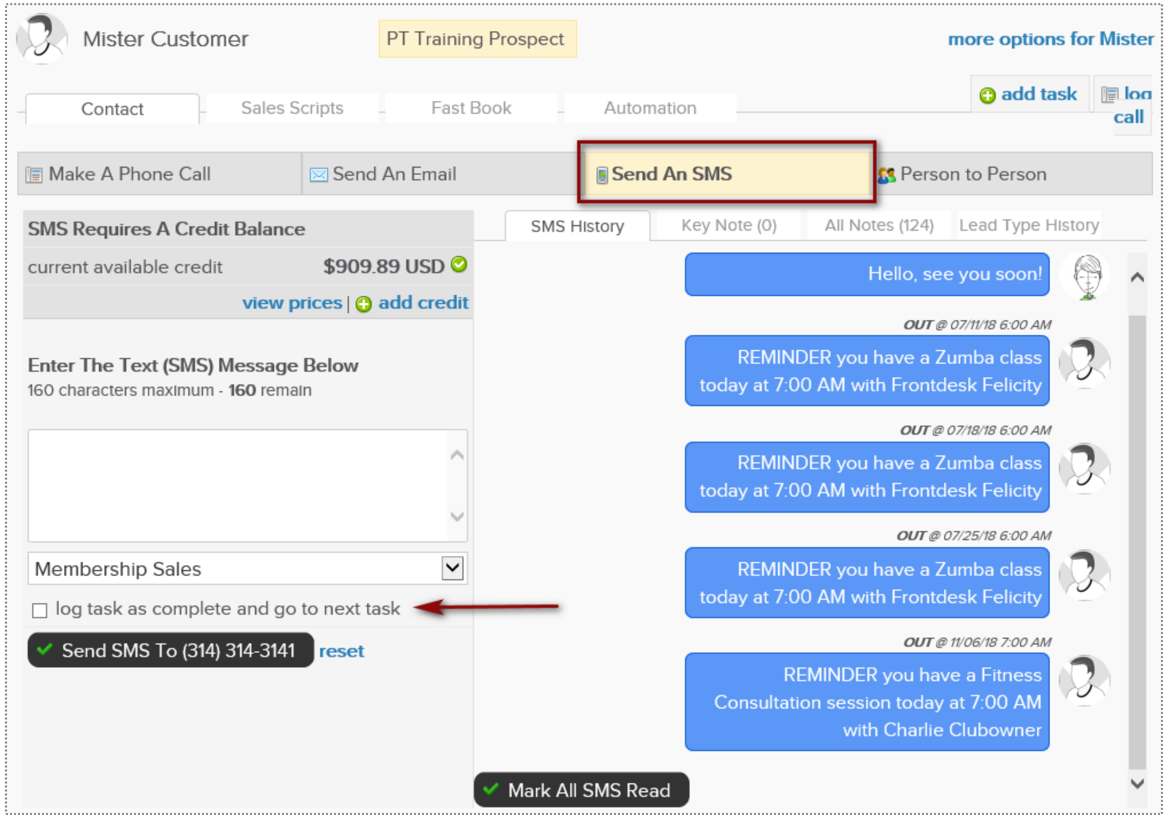
Work It: Emails

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



Work It: SMS (Text Messages)

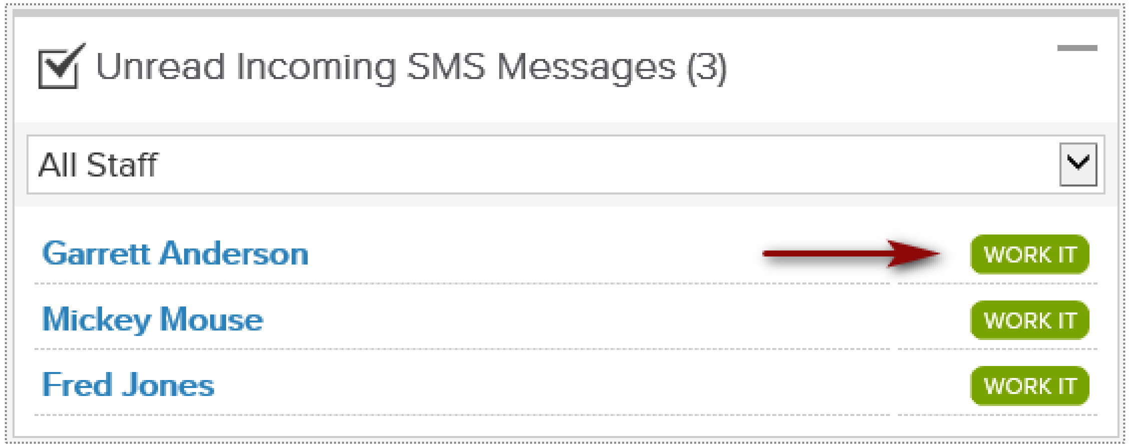
The **Send An SMS** tab allows you to send a text message to your client as well as view any past texts. If your site is not integrated with Zipwhip, you'll need to use ClubReady "Send An SMS"; this will require a balance of credits to be uploaded to site. See CR for pricing.

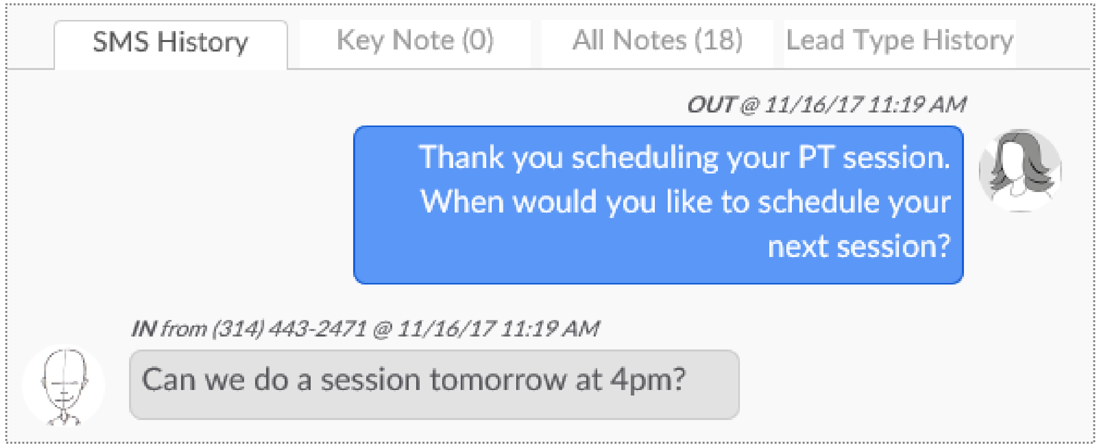


Widget: Unread Incoming SMS

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.

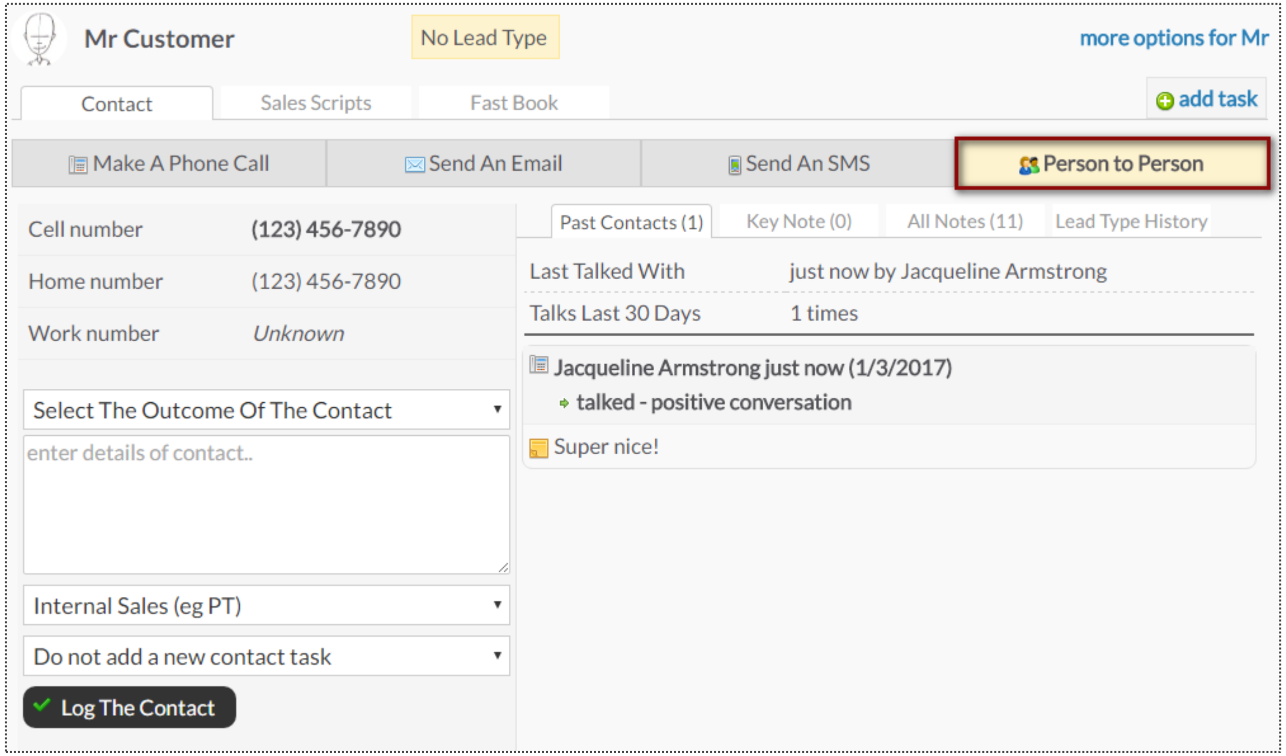
To confirm that you have read the new message, and remove this customer from your Unread SMS widget list, click **Mark All SMS Read.**





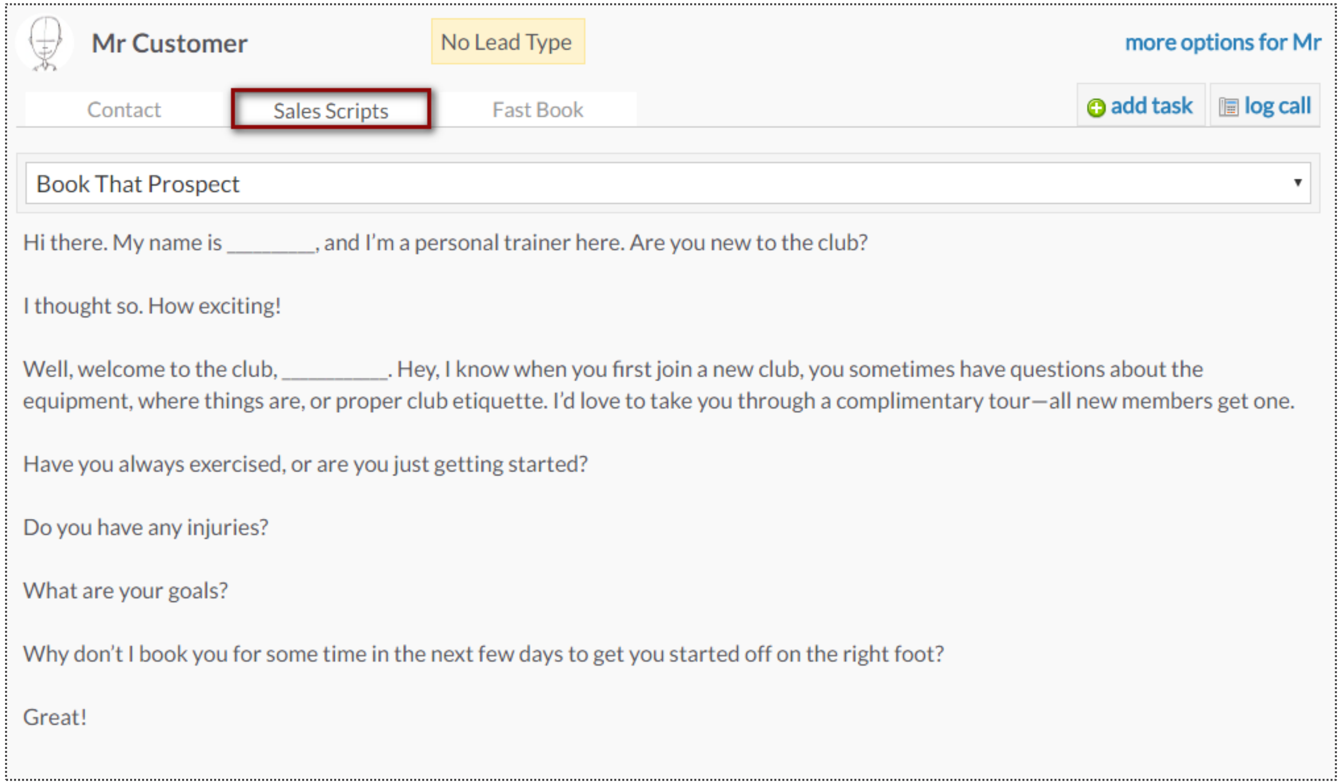
Work It: Person to Person

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



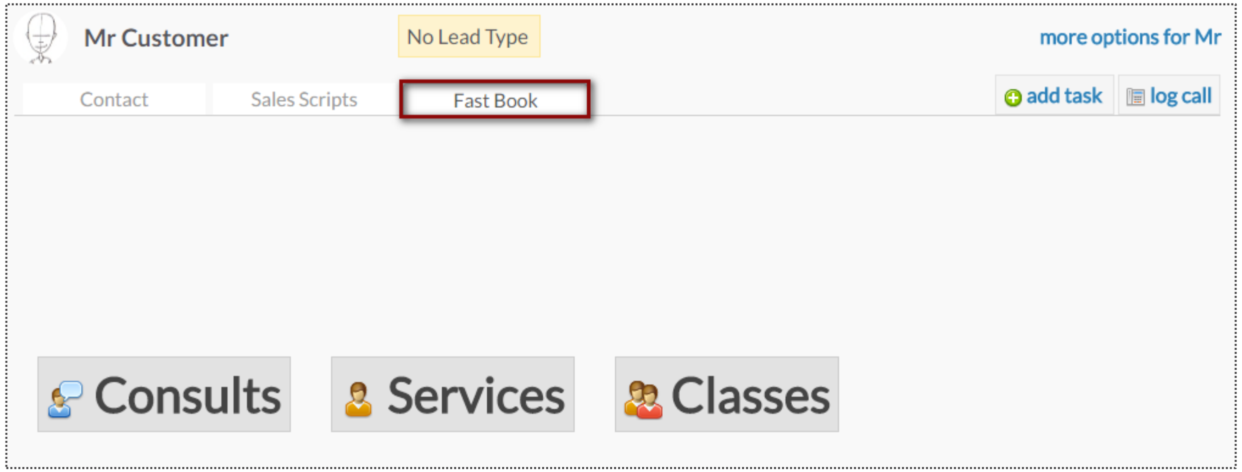
Work It: Sales Scripts

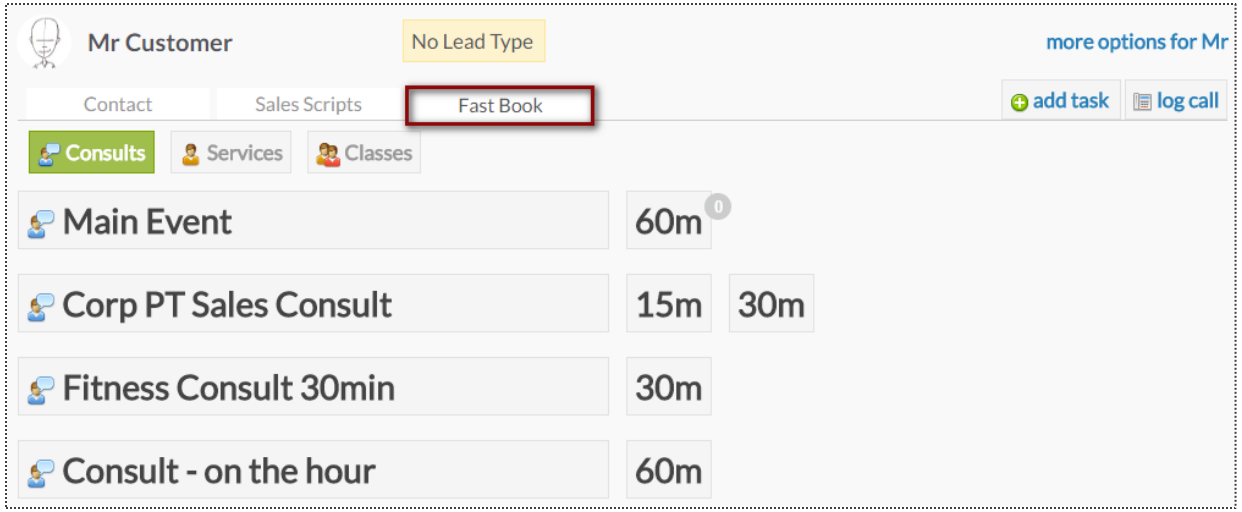
Scripts can help narrate a call between a client and staff member. Select the desired script from the drop-down in the top left corner and the content will appear below for the employee to follow.



Work It: Fast Book – Book a Class

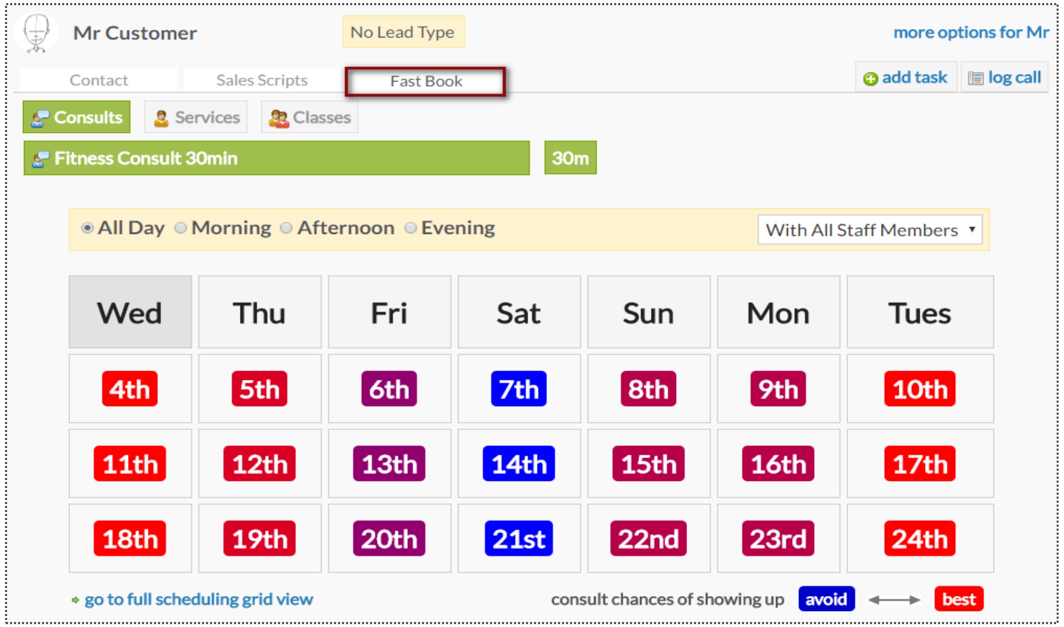
The **Fast Book** tab allows you a fast and easy way to book your client into **Consults**, **Services** or **Classes.** Simply select the type of service you wish to book as well as the duration.

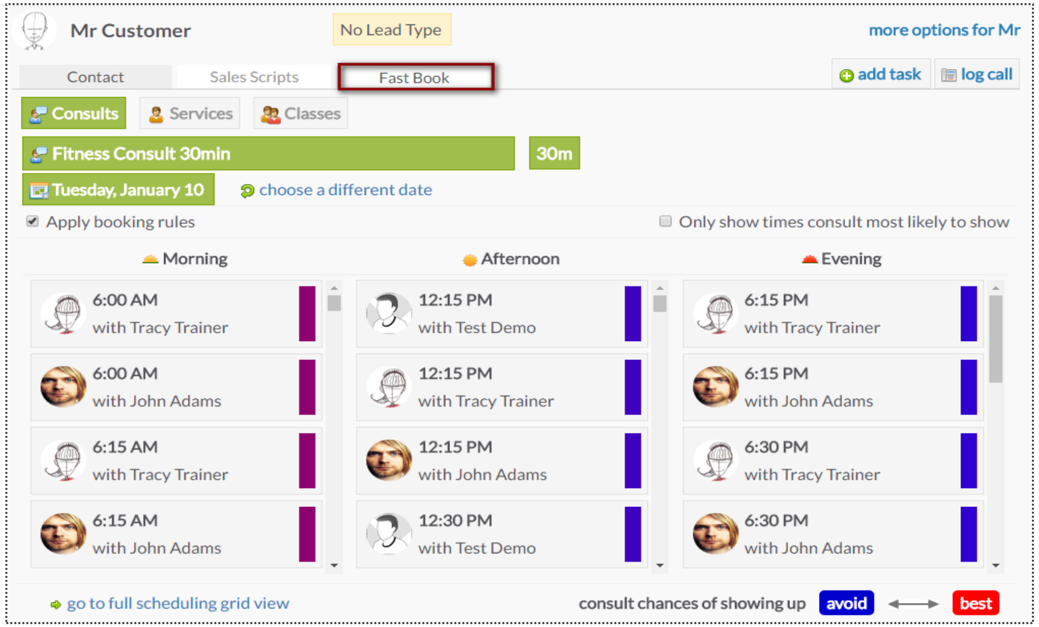




Work It: Fast Book

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.

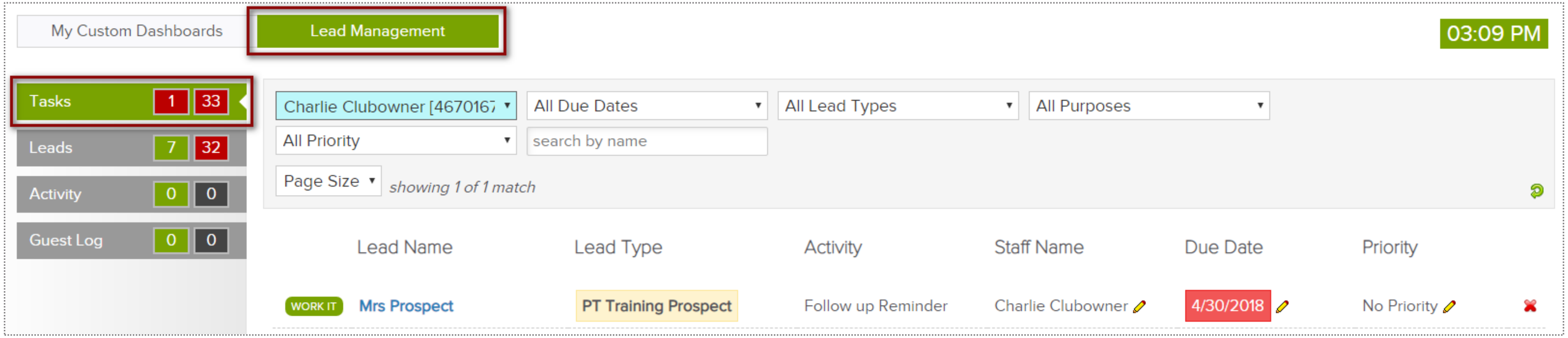




Lead Management Dashboard: Tasks

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.

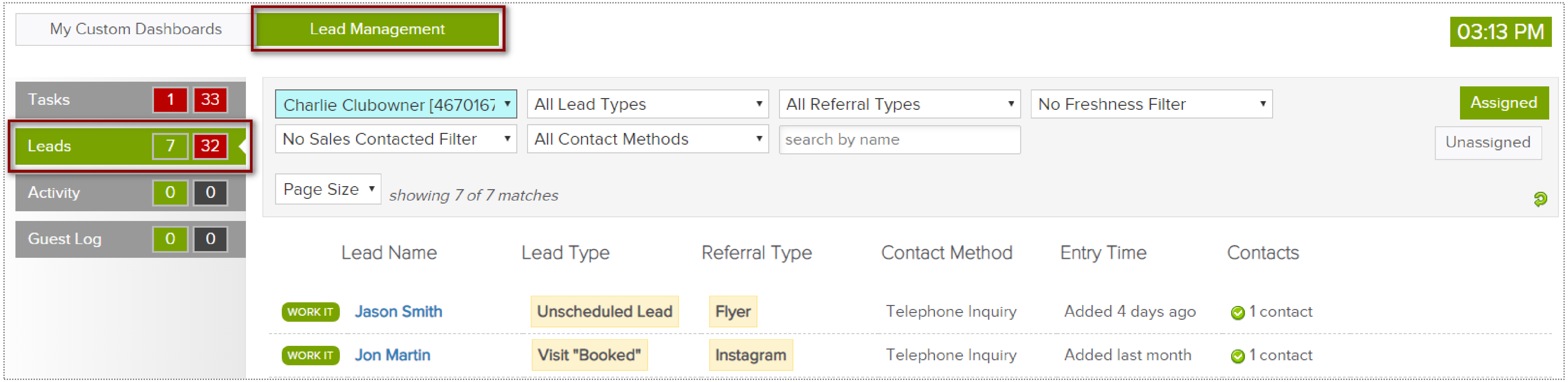
The screen will display a list of tasks with the **Lead Name**, **Lead Type**, **Activity** that needs to be completed, **Staff Name** assigned to the task, **Due Date** and **Priority**. Select the **WORK IT** button to add details and log the task as completed.



Lead Management Dashboard: Leads

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.

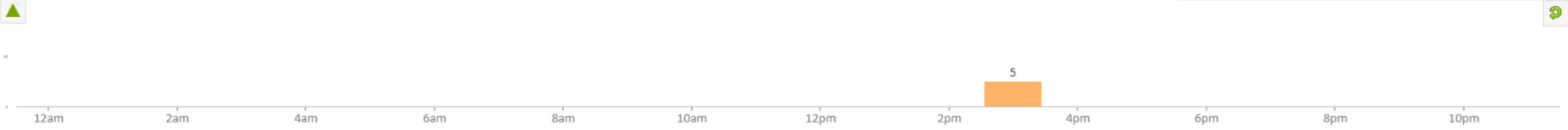
The screen will display a list with the **Lead Name**, **Lead Type**, **Referral Type**, **Contact Method**, **Entry Time** and **Contacts**. Click on **WORK IT** if you need to follow up with the lead and log the contact details.



Lead Management Dashboard: Activity

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.

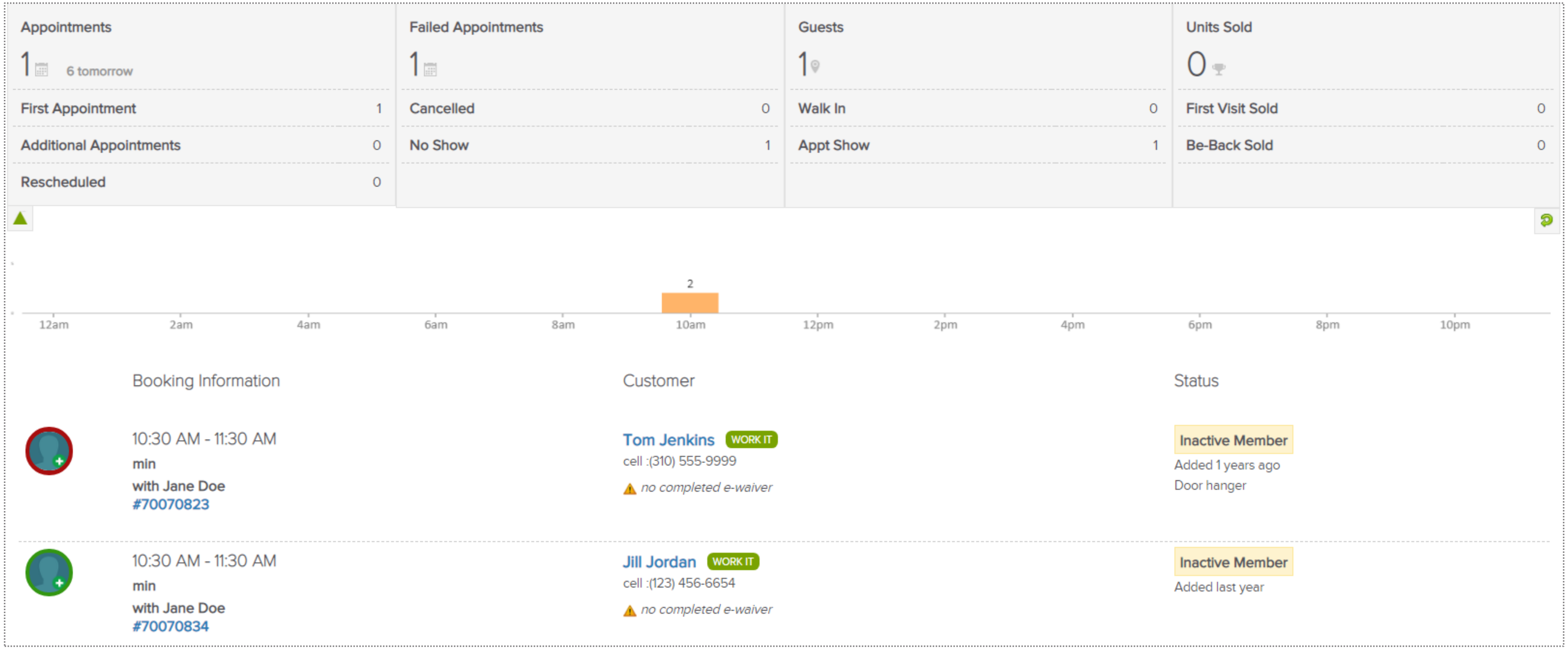
Tasks Done		Bookings		New Leads		New Deals	
4		0		1		0	
Calls Made	1	Today	0	Referrals	1	Members Created	0
Emails Sent	1	Tomorrow	0	Walk In	0	POS Referrals	0
SMS Sent	1	Future	0	Phone	0		
Person to Person	1			Email / Web	0		
				Guerilla Marketing	0		



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

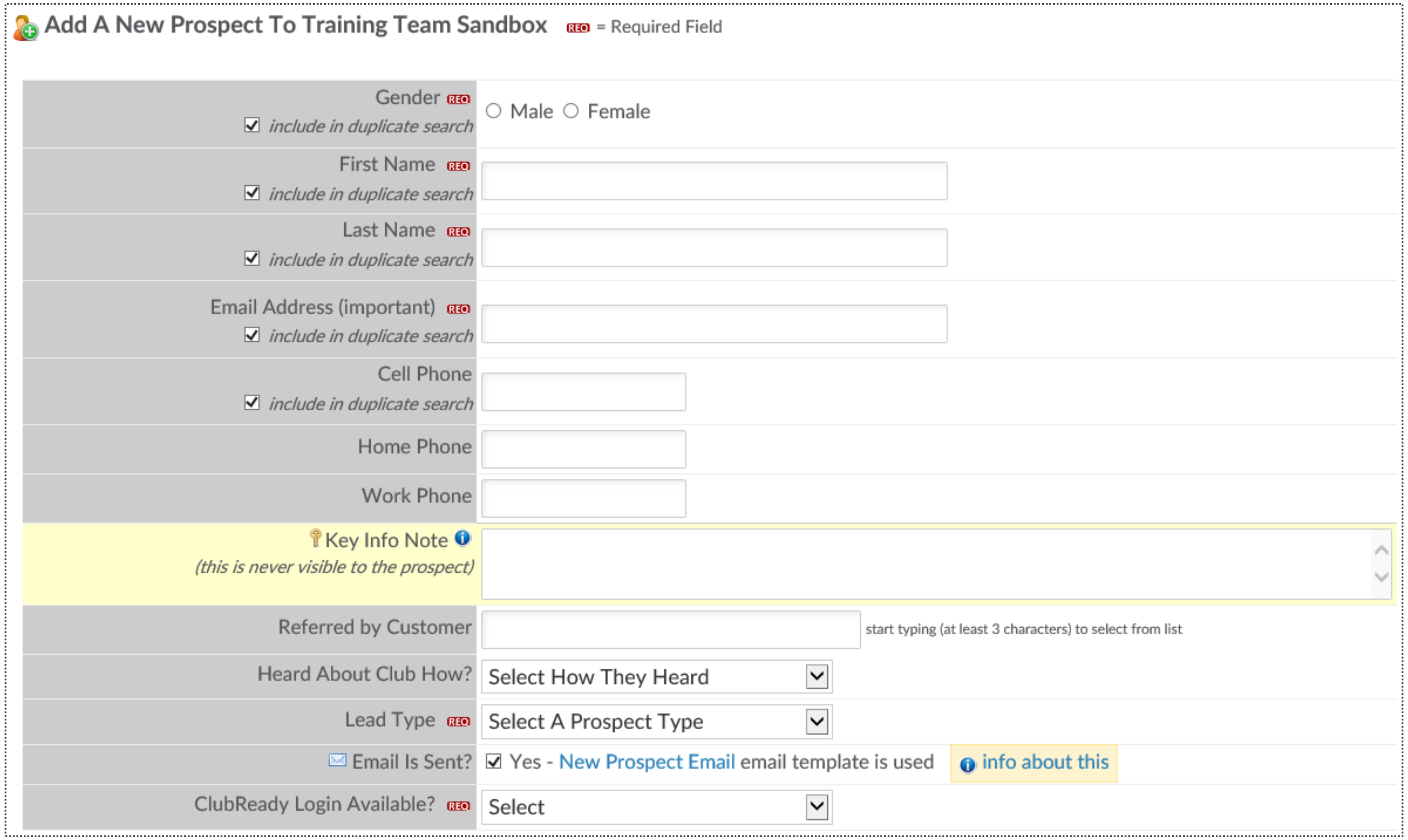
Lead Management Dashboard: Guest Log

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.



Entering a Prospect

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


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

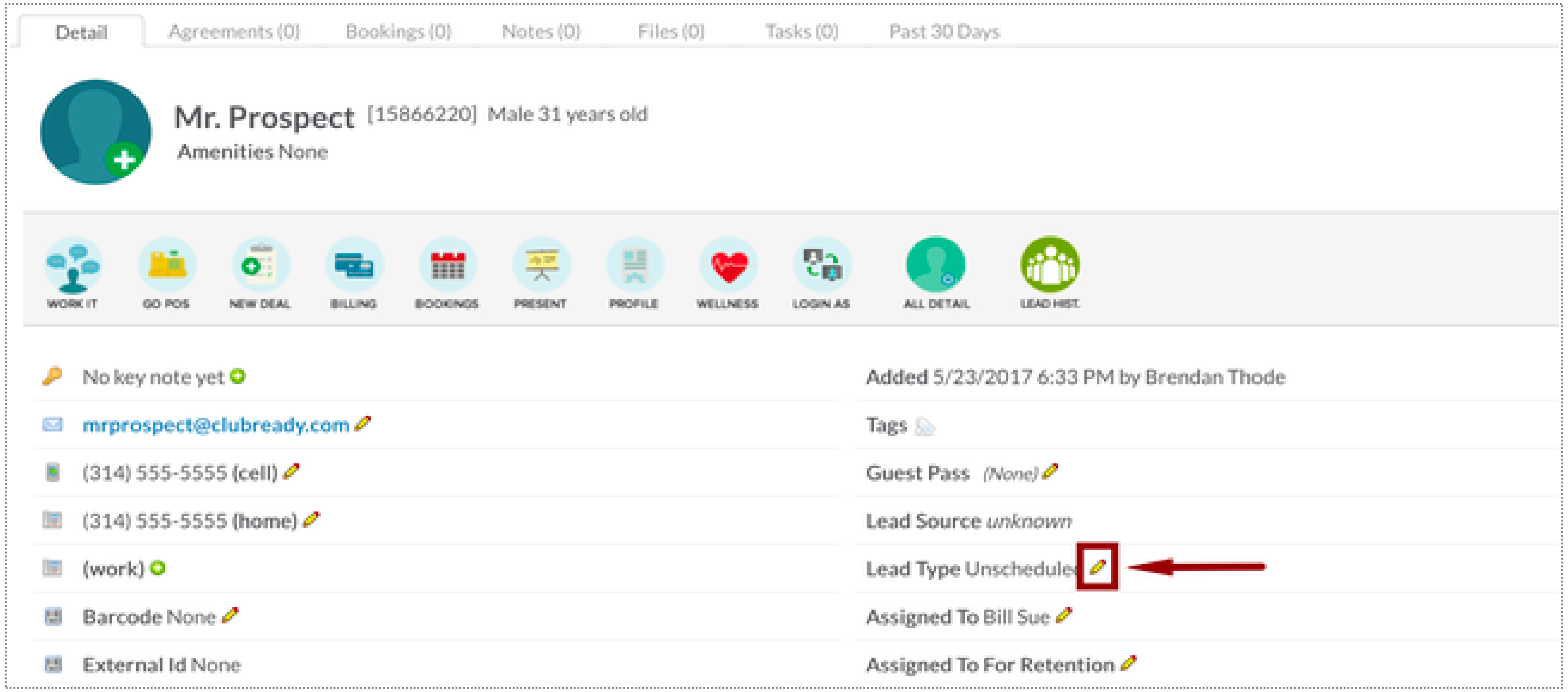
Gender REQ ☑ *include in duplicate search*	○ Male ○ Female
First Name REQ ☑ *include in duplicate search*	
Last Name REQ ☑ *include in duplicate search*	
Email Address (important) REQ ☑ *include in duplicate search*	
Cell Phone ☑ *include in duplicate search*	
Home Phone	
Work Phone	
Key Info Note *(this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

Manually Edit Lead Type

Prospects > Select Your Prospect

From the prospect summary page, select the edit pencil next to the **Lead Type** field. Select the desired lead type from the drop down menu. Click **Update** to save your changes.

Note: Lead Types are auto-populated based off life cycle and do not need to be manually changed. The Lead Type drives what type of tasks will trigger for the prospect.

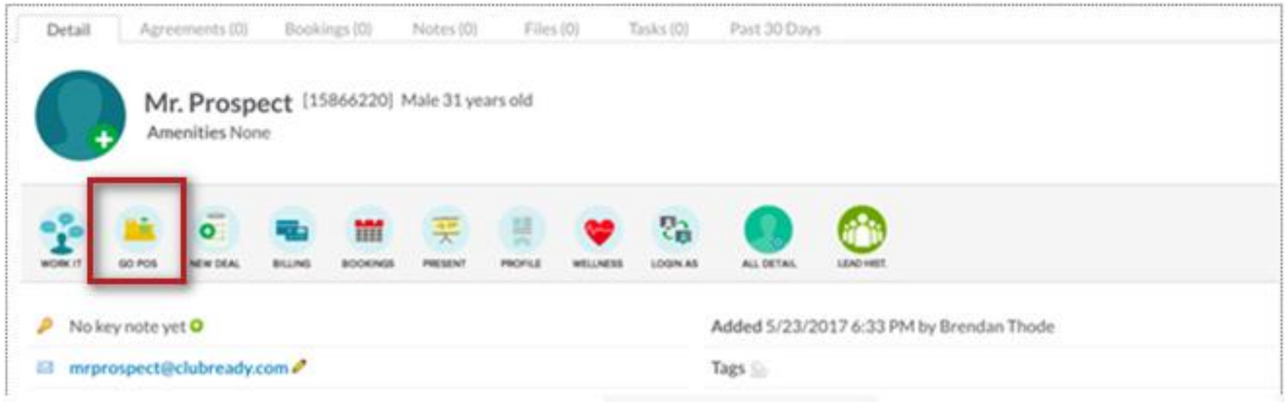


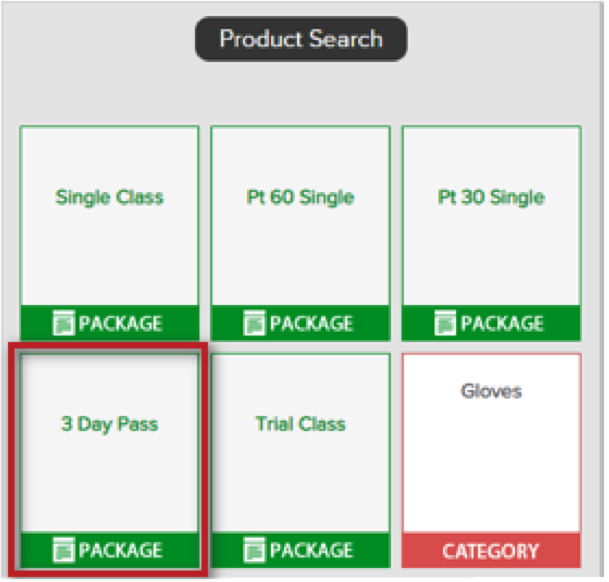
Issue Trial Membership: POS

Select Your Prospect > GO POS > POS Shortcut

From the prospect profile, select **GO POS**; this will direct you to the point of sale. For the POS Shortcuts, select the one of the two Trial Member options (3 Day Pass or Trial Class). Continue to complete the sale to finalize.

Note: this way to activate trial will not prompt to complete a waiver; see Issue Trial Membership: New Deal for waiver completion.





Issue Trial Membership: New Deal

Select Your Prospect > New Deal > Update Guest Details > Trial Memberships - Pass

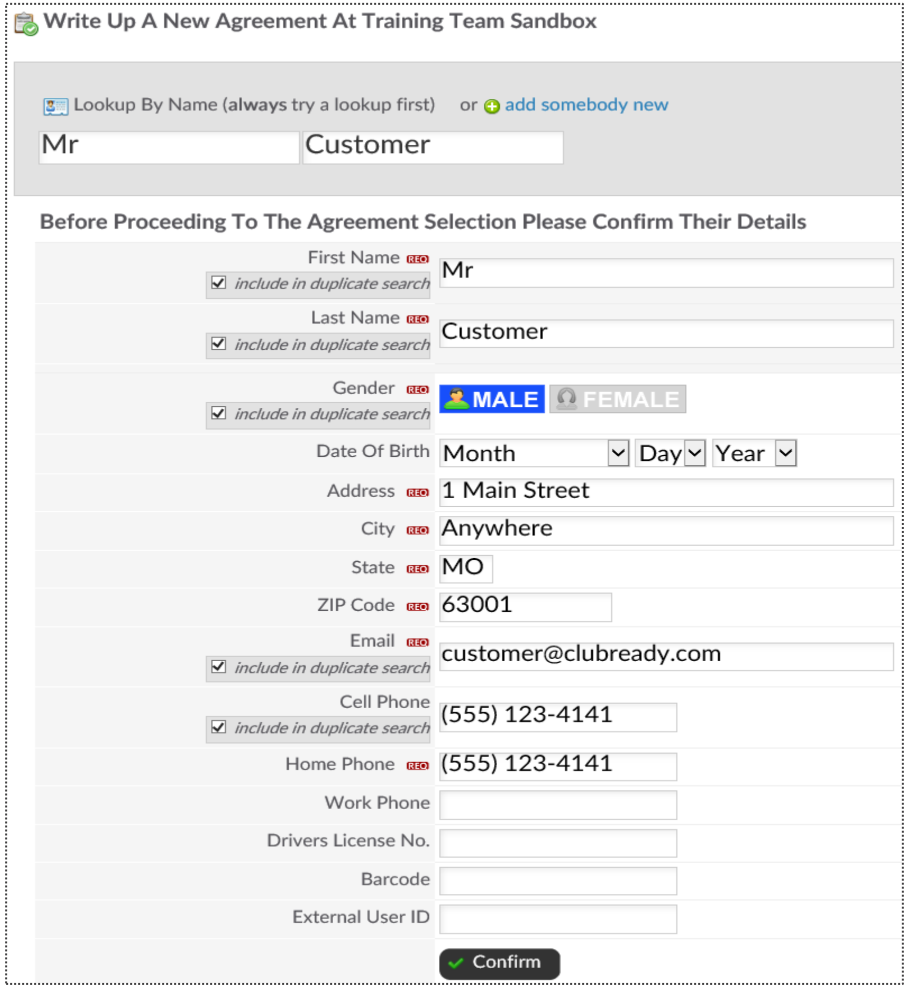
From the membership package Trial Memberships - Pass, choose Trial Membership option by clicking **Select This Package** to the left of the Trial Membership of your choice. This will take you to complete the remaining steps to sell a $0 agreement to the guest; please continue to Writing an Agreement for complete instructions.

Note: The will start on the day of Trial Membership sale; it is best to sell on first visit.

Writing An Agreement

Writing an Agreement

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


Write Up A New Agreement At Training Team Sandbox

Lookup By Name (**always** try a lookup first) or add somebody new

Mr | Customer

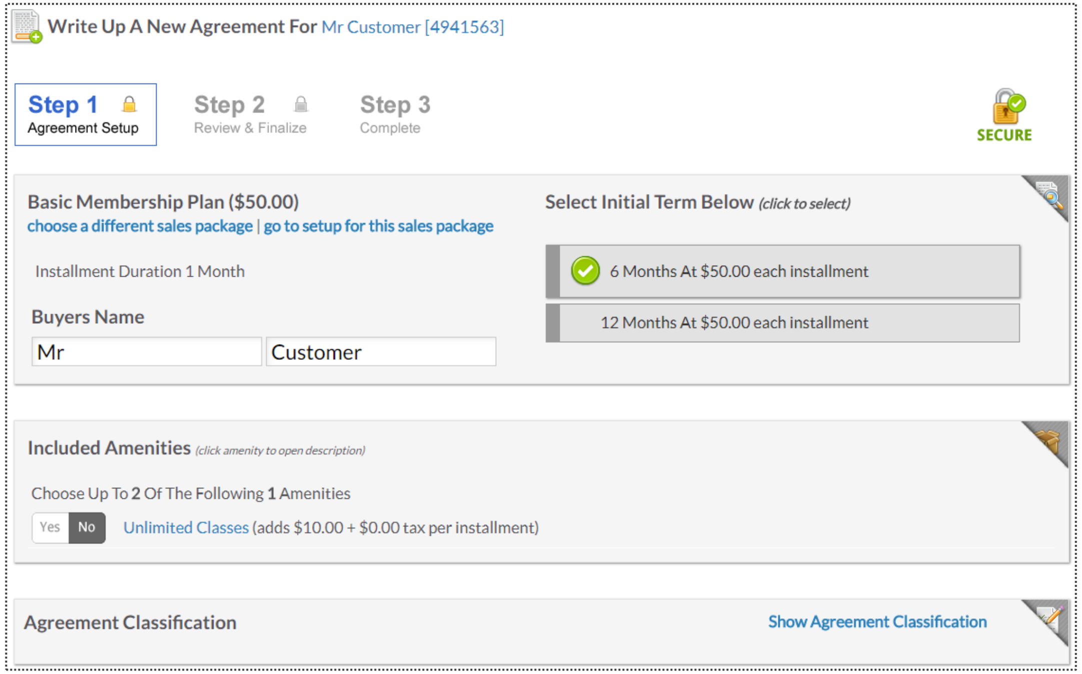
Before Proceeding To The Agreement Selection Please Confirm Their Details

First Name REQ ☑ *include in duplicate search*	Mr
Last Name REQ ☑ *include in duplicate search*	Customer
Gender REQ ☑ *include in duplicate search*	MALE FEMALE
Date Of Birth	Month Day Year
Address REQ	1 Main Street
City REQ	Anywhere
State REQ	MO
ZIP Code REQ	63001
Email REQ ☑ *include in duplicate search*	customer@clubready.com
Cell Phone ☑ *include in duplicate search*	(555) 123-4141
Home Phone REQ	(555) 123-4141
Work Phone	
Drivers License No.	
Barcode	
External User ID	
	Confirm

Writing a Membership Agreement

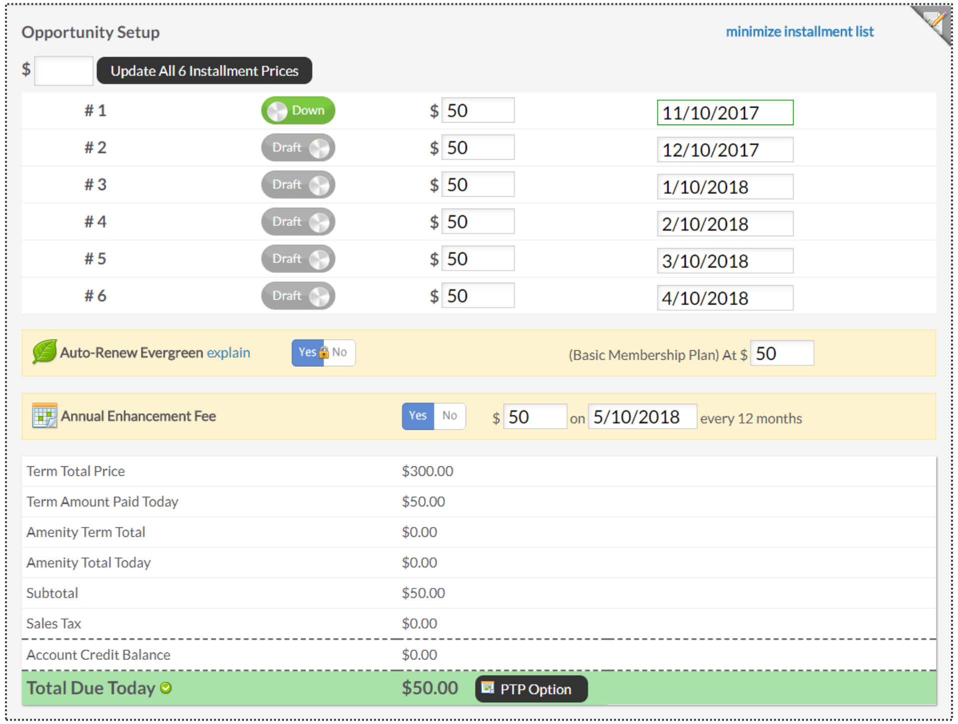
Step 1: After selecting the Sales Package Folder and desired package you will be taken to the **Write Up A Agreement For** screen.

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



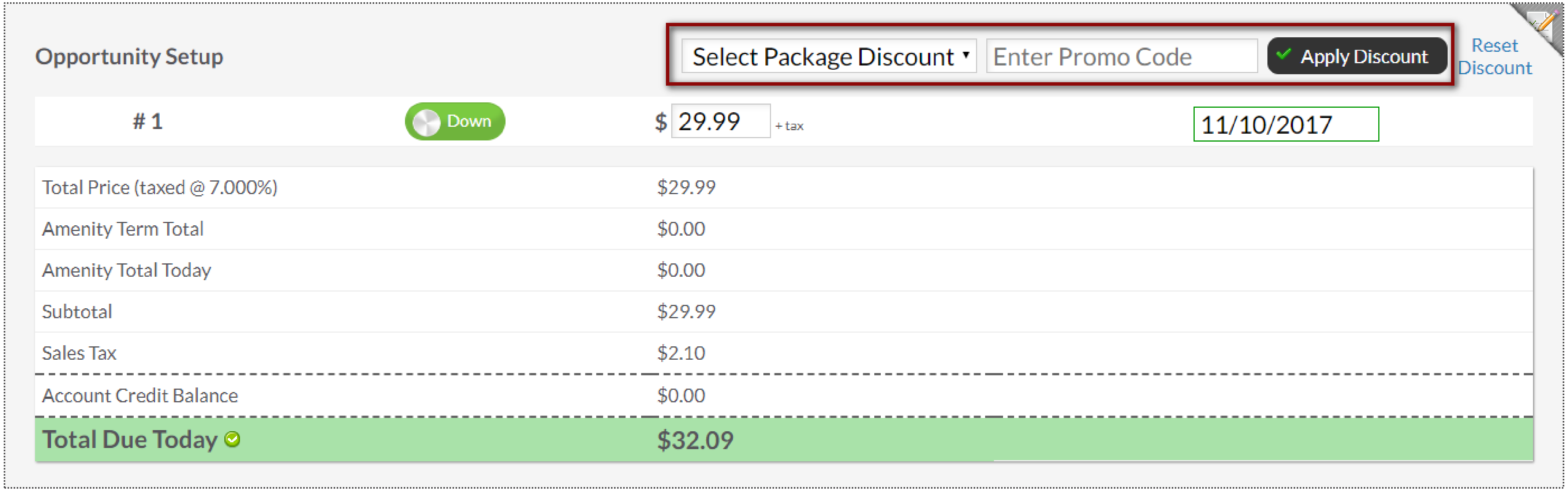
Writing a Membership Agreement

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.



Apply a Package Discount

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

Once applied, it will automatically display the discount.

Opportunity Setup

Brooks Discount | Enter Promo Code | Apply Discount | Reset Discount

# 1	Down	$ 29.99 + tax	$26.99	11/10/2017

Total Price (taxed @ 7.000%)	$29.99	$26.99
Amenity Term Total	$0.00	$0.00
Amenity Total Today	$0.00	$0.00
Subtotal	$29.99	$26.99
Sales Tax	$2.10	$1.89
Account Credit Balance	$0.00	$0.00
Total Due Today	**$32.09**	**$28.88**

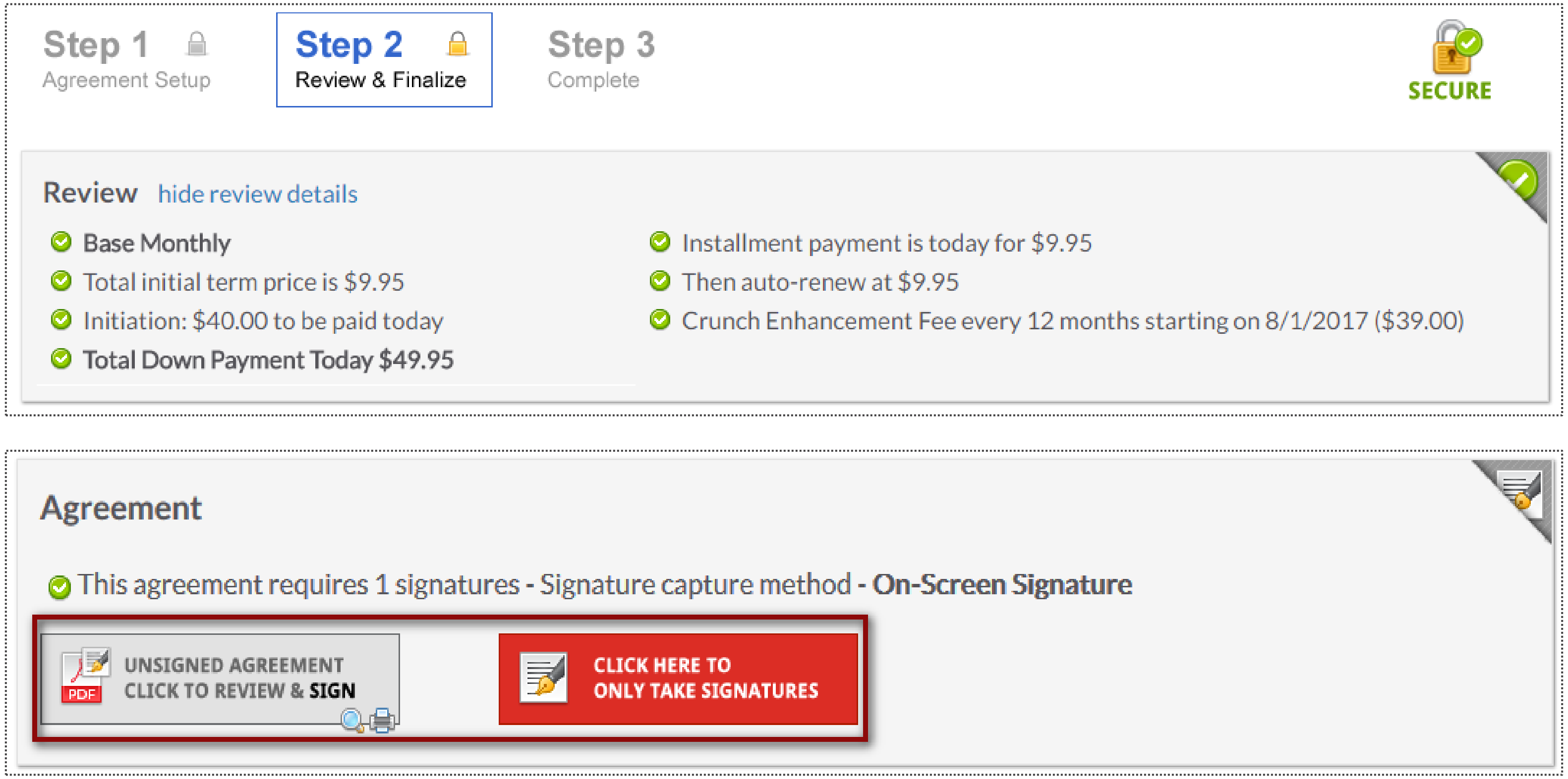
Writing a Membership Agreement

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.**

Writing a Membership Agreement

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

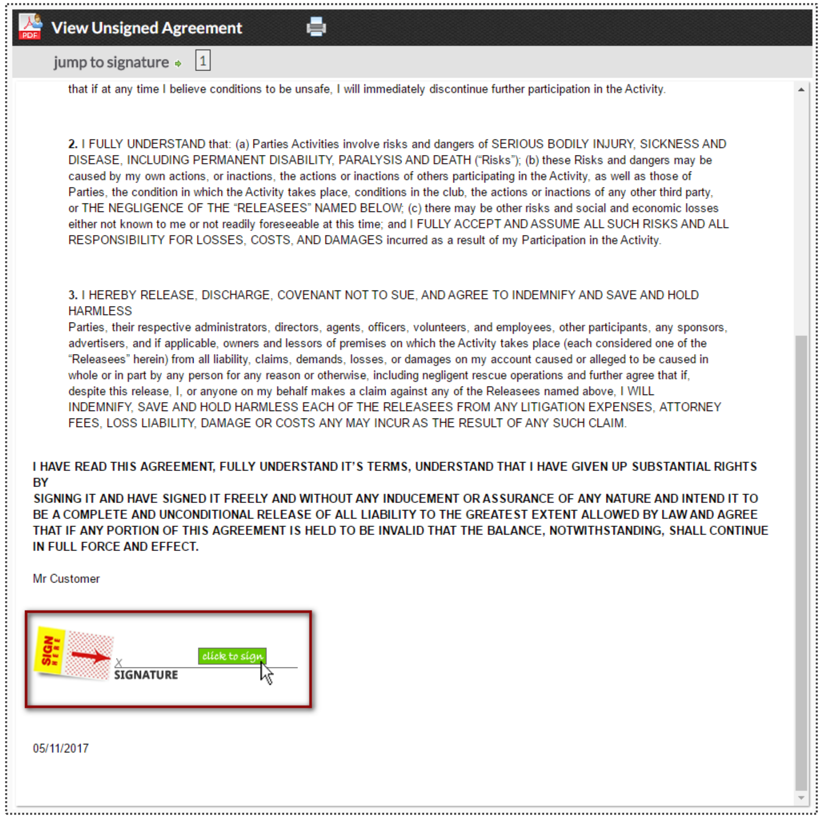
Select here to open full agreements for signatures.



Writing a Membership Agreement

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.


View Unsigned Agreement

jump to signature 1

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

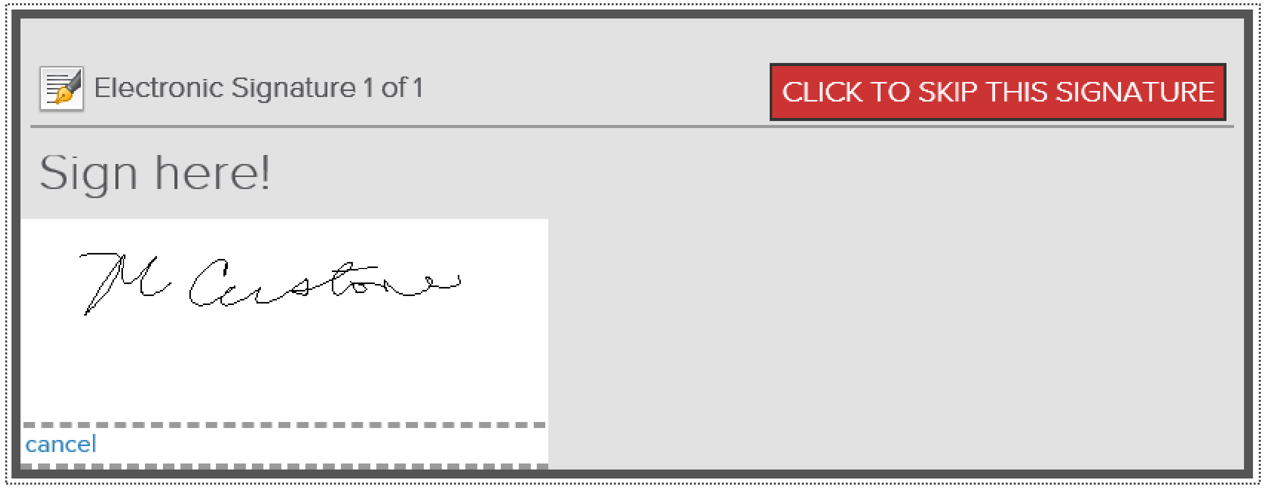
2. I FULLY UNDERSTAND that: (a) Parties Activities involve risks and dangers of SERIOUS BODILY INJURY, SICKNESS AND DISEASE, INCLUDING PERMANENT DISABILITY, PARALYSIS AND DEATH ("Risks"); (b) these Risks and dangers may be caused by my own actions, or inactions, the actions or inactions of others participating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

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

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

Mr Customer

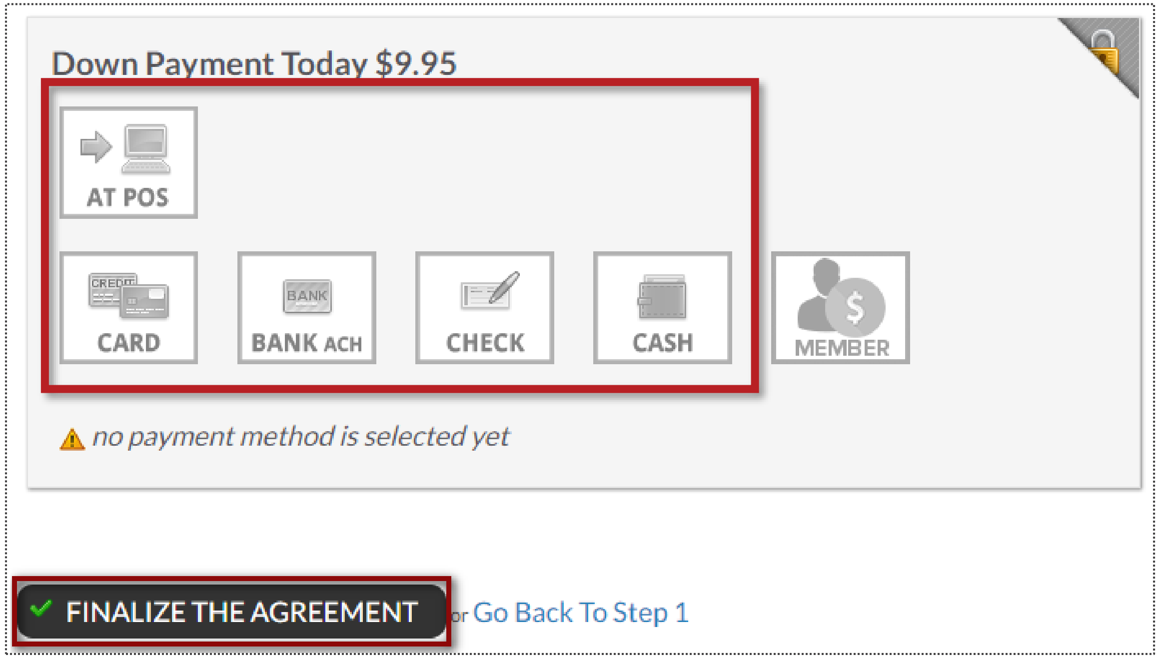
05/11/2017



Writing a Membership Agreement

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'.



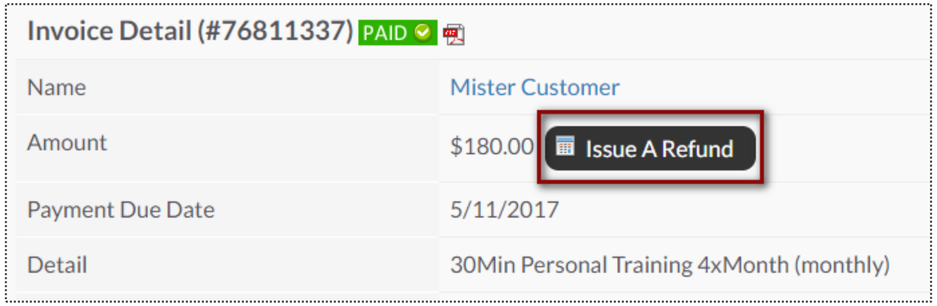
Member Payment Management

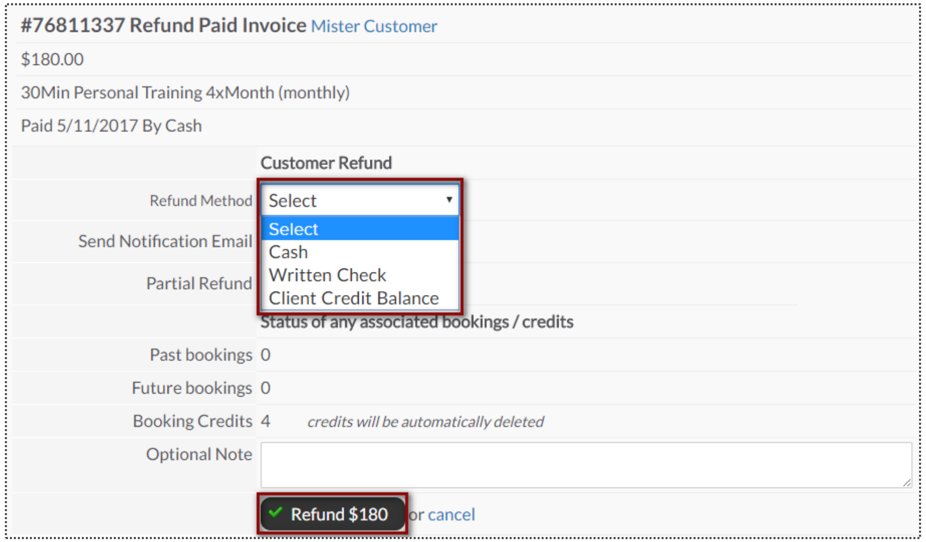
Refund an Invoice

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

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

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

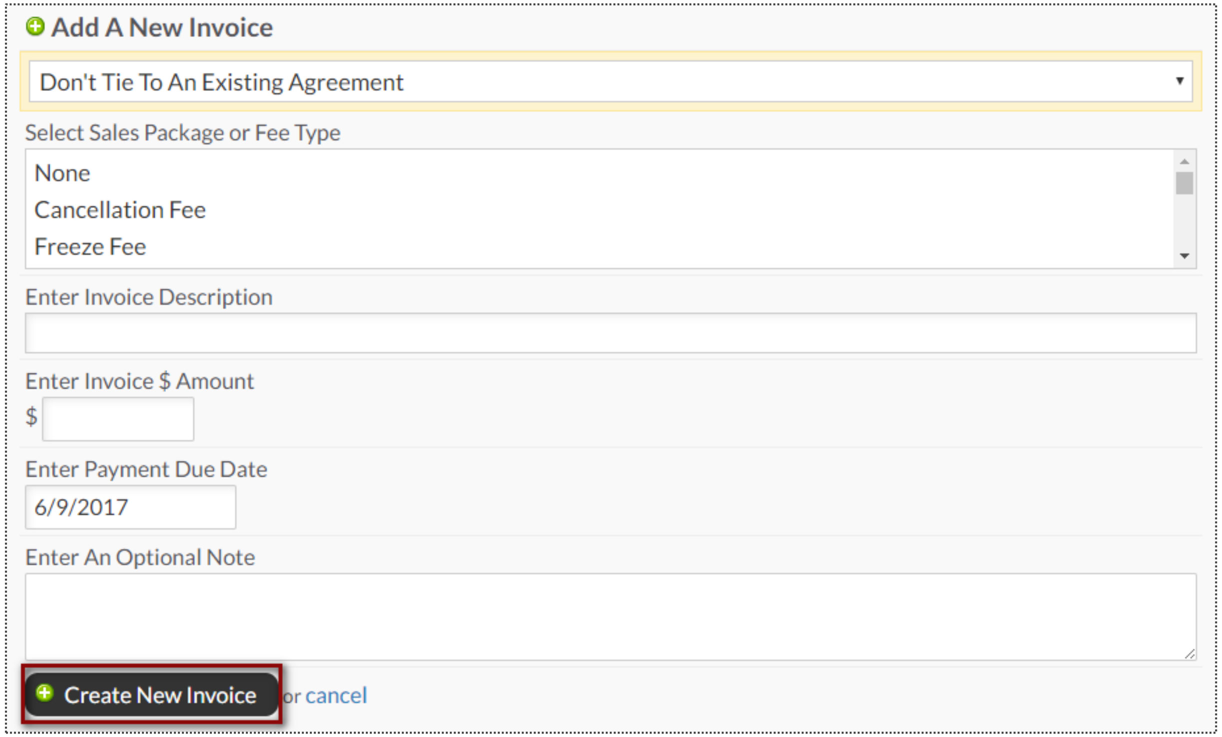




Adding a New Invoice (Cancel Fee, etc..)

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

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**

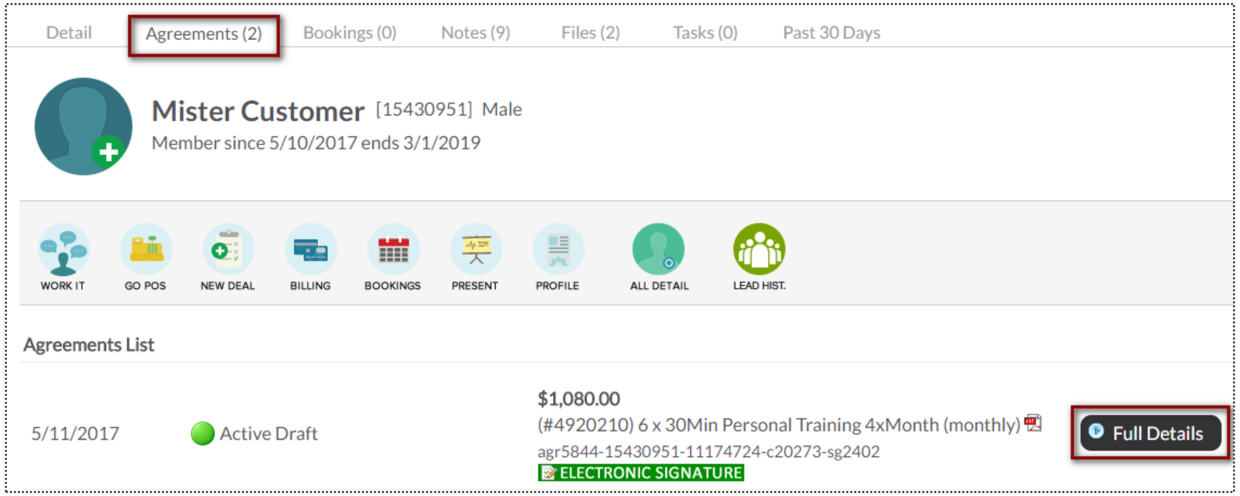


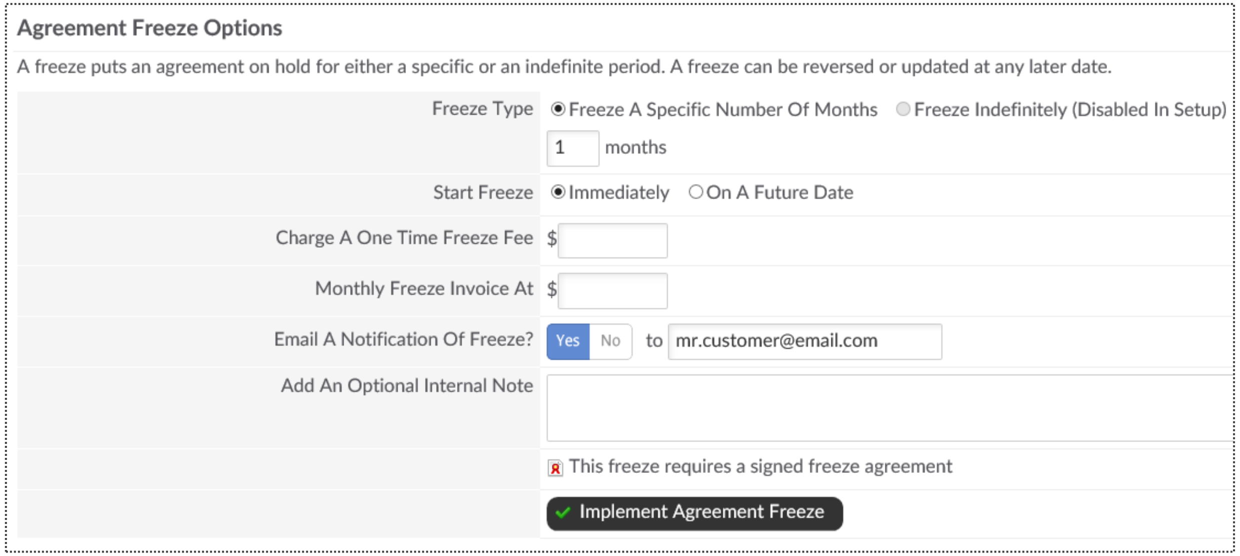
Freeze an Agreement

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.



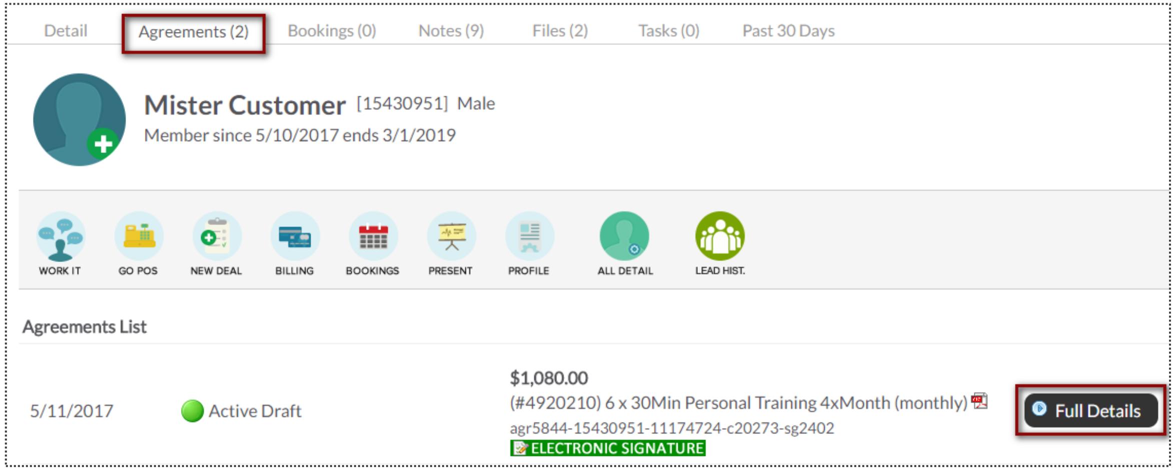


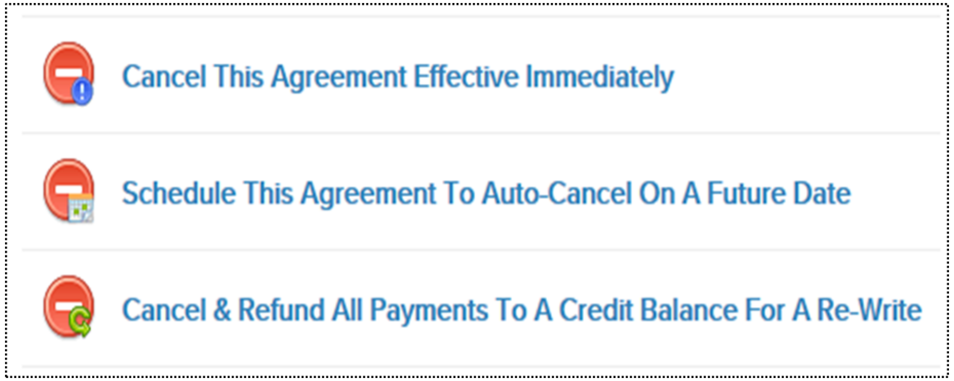
Cancel an Agreement

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.

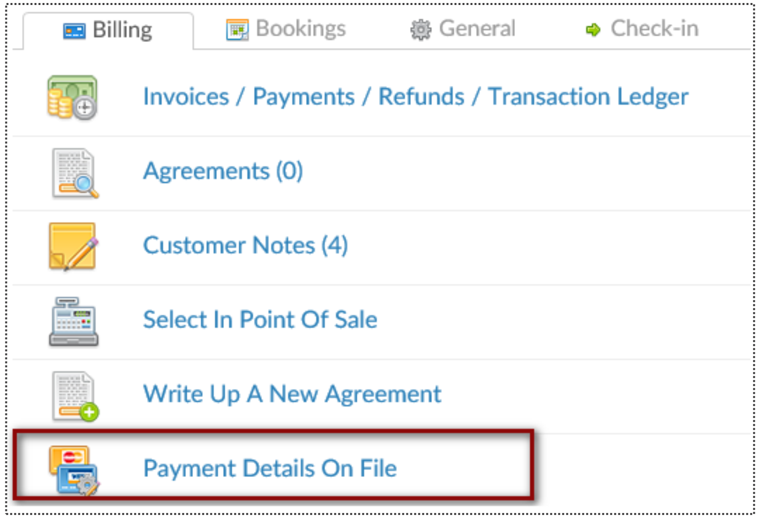


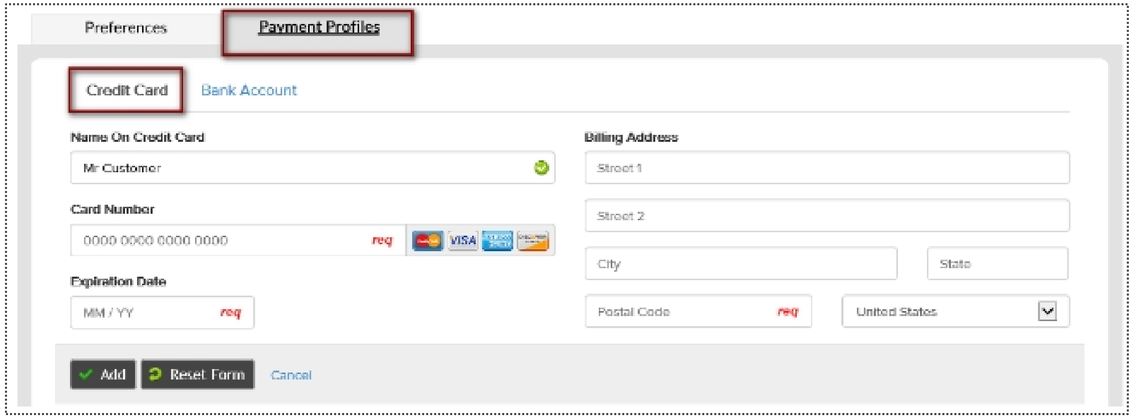


Add/Update Credit Card on File

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.



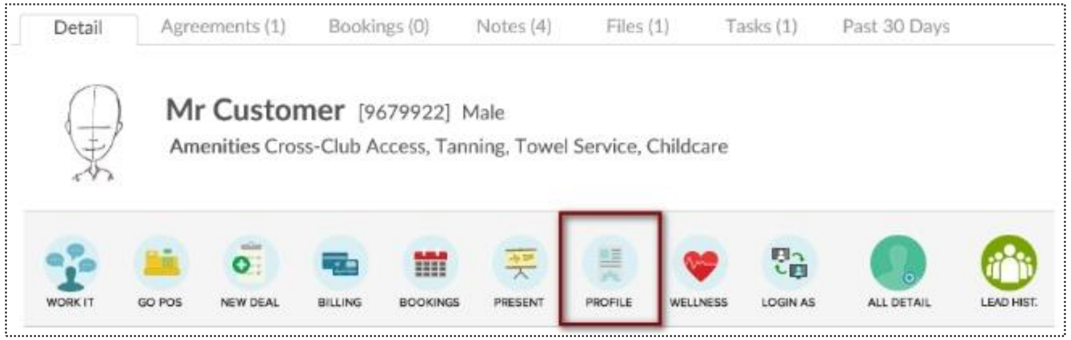


Member Profile

Update Member's Profile

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**.

NOTE: The user's email address (which serves as their login username) can only be adjusted in ClubReady and not PIQ.

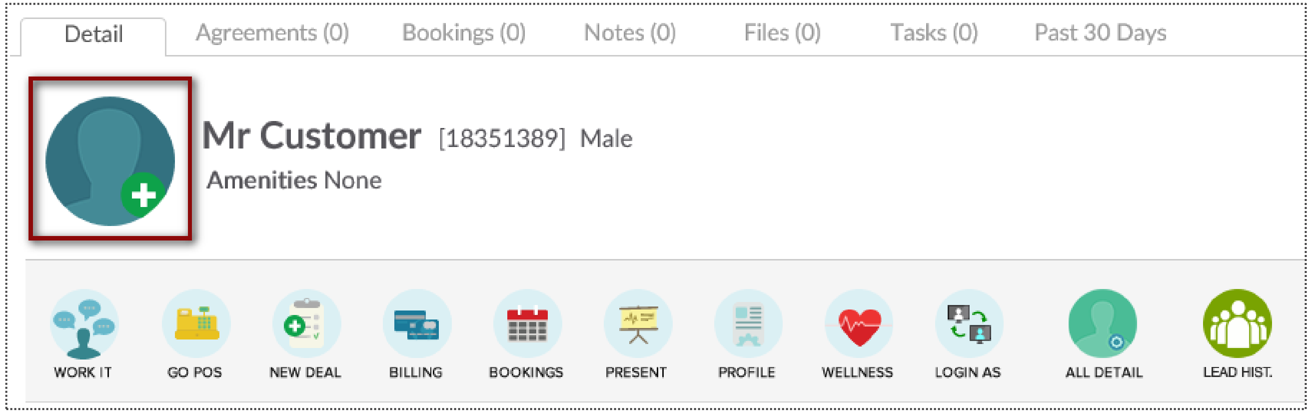


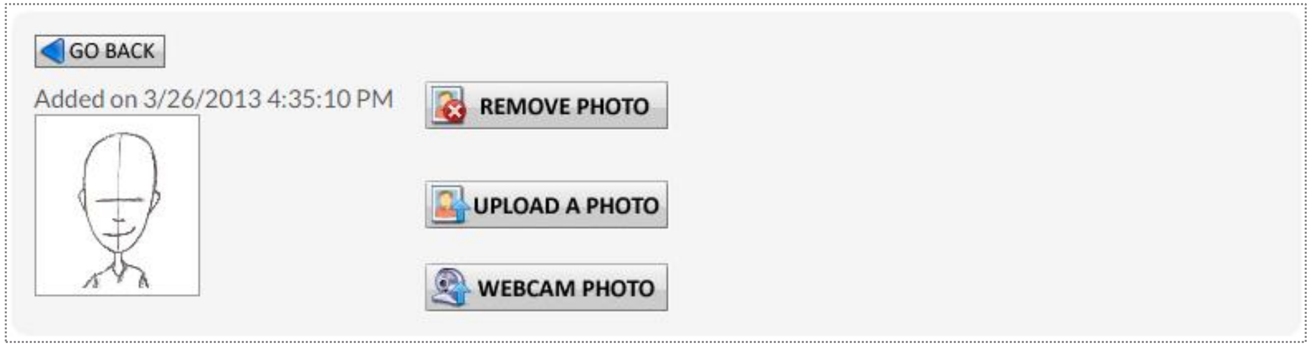
First Name	Mr
Family Name	Customer
Address	111 street st
City	st louis
State / Province	MO
ZIP Code	63116
Preferred Contact Method	Select
Phone	(314) 457-5454
Cell Phone	
Work Phone	
Email Address	mrcustomer@clubready.com

TITLE BOXING CLUB

Add a Photo

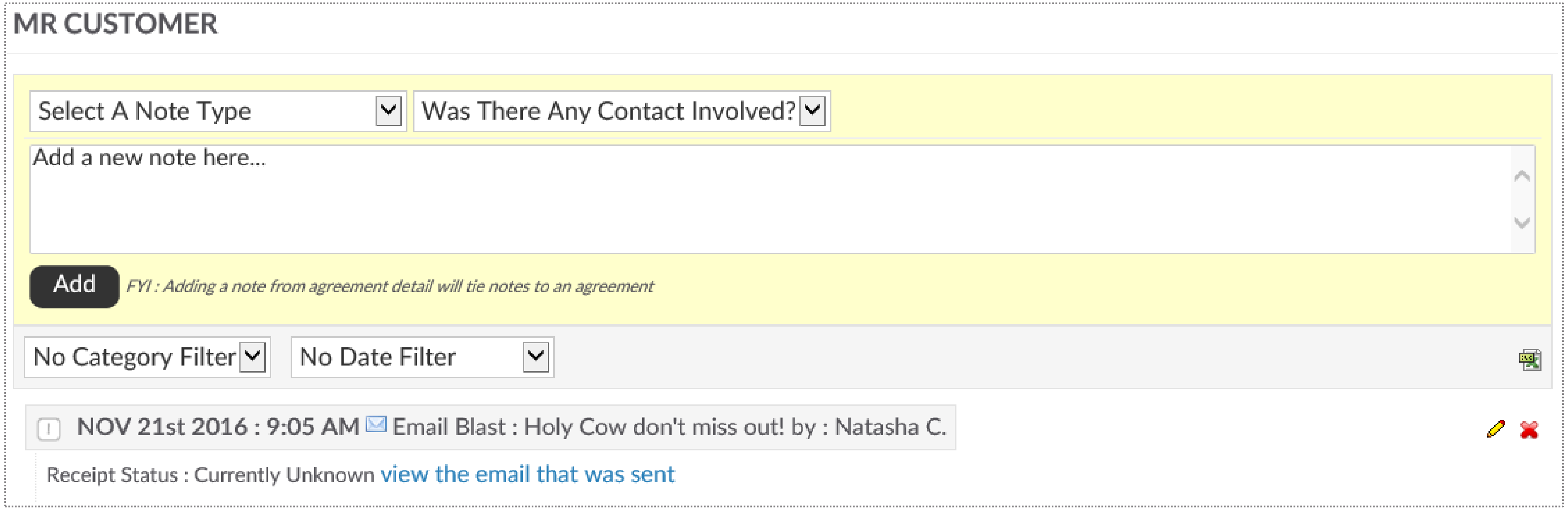
Click to **Upload A Photo** or **Webcam Photo** button and the photo will be successfully added to the client's profile.





Member Notes

Select A Note Type from the first drop down menu and indicate if there **Was There Any Contact Involved** with the member from the second drop down menu. Type your note into the text box and click **Add** to save the note.



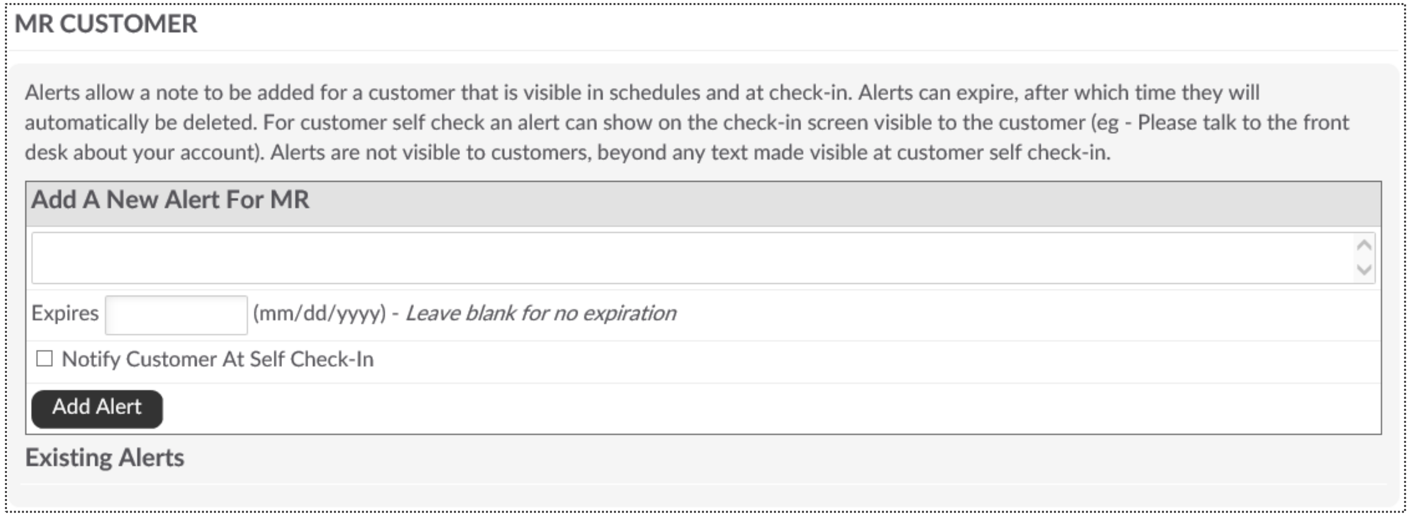
Add a Member Alert

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)

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

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.

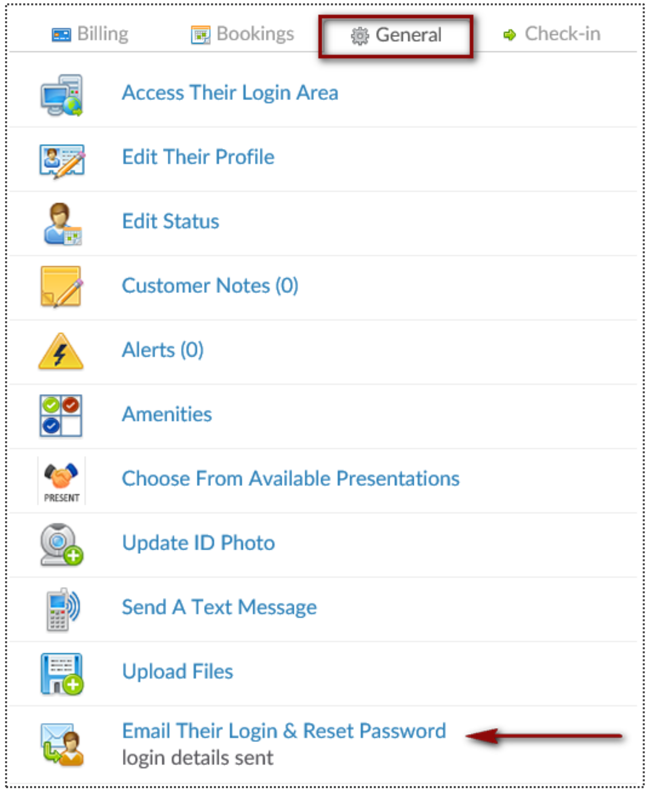
Notify Customer At Self Check-In box allows you to enter the message you wish the customer to see. If selected the customer would immediately be notified, upon check-in, of the alert.



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.

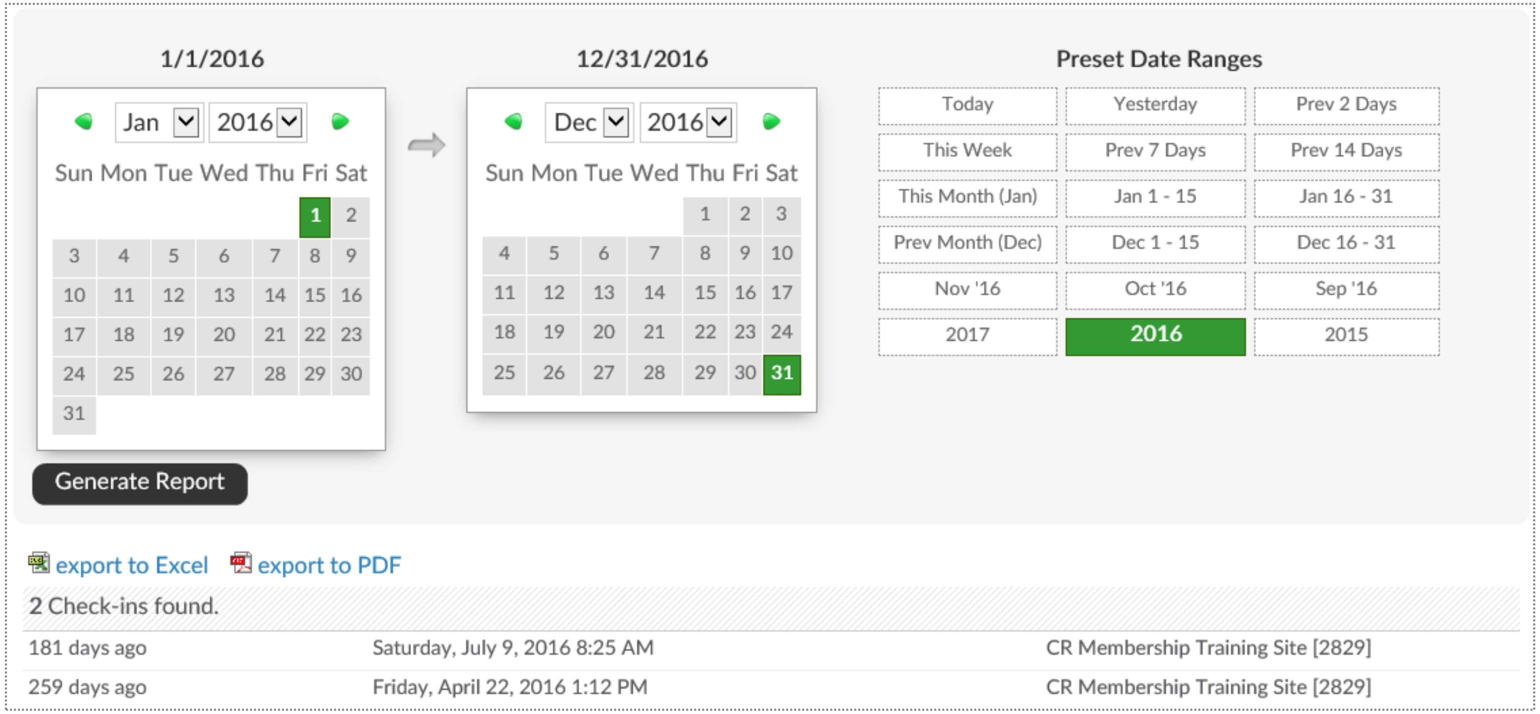
Select the link for **Email Their Login & Reset Password**, a confirmation message *login details sent* will appear.



View Check In History

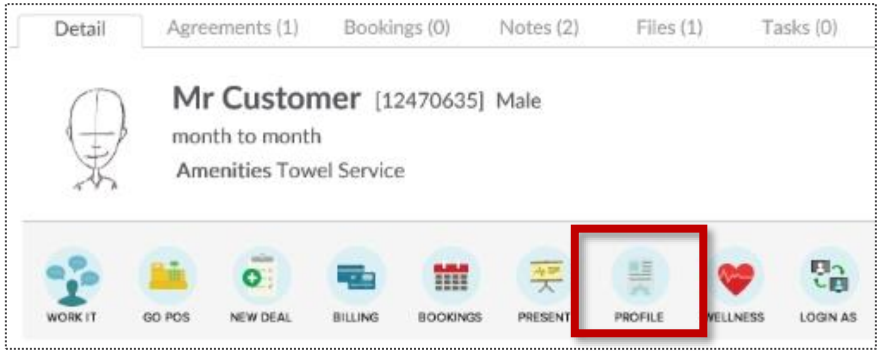
To generate this report, select the date range and click to **Generate Report.** The results will display on screen and show the number of check-ins, date of the check-ins, and the club location of the check-ins.

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 Member Check-in Code

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



NOTE: The Check In is based on the user's phone number. Make sure it is added on the **CELL PHONE** field.

Point of Sale (POS)

Point of Sale Setup

The POS is used for taking payment on past due and future invoices as well as for selling merchandise. The club will need to decide which type of POS terminal they will use a Simple POS or Full POS (differences below).

Note: Full POS will require staff members to assigned to POS.

Simple POS vs. Full POS

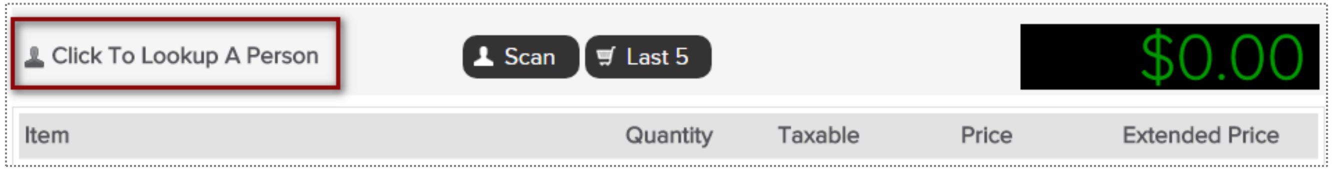
The simple POS does not have the level of controls that the full POS terminals have. A full breakdown of the difference can be found below.

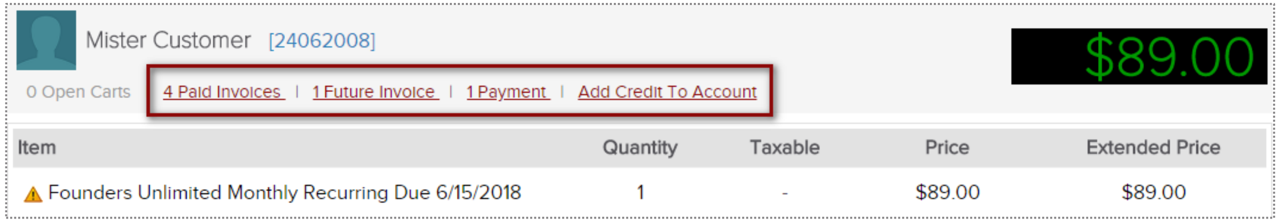
Functionality	Simple POS Terminal	Full POS Terminal
Used By Multiple Logins At Once	✓	Tied To 1 Login
Sell Merchandise	✓	✓
Pay Existing Invoices	✓	✓
Cash Drawer	-	✓
Receipt Printer	-	✓
Open / Close Management	-	✓
Cash Drawer Managament	-	✓
POS Reports	-	✓
Usage	Admin Permissions	Users Tied to POS
Drop / Add Cash	-	✓

Point of Sale

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.

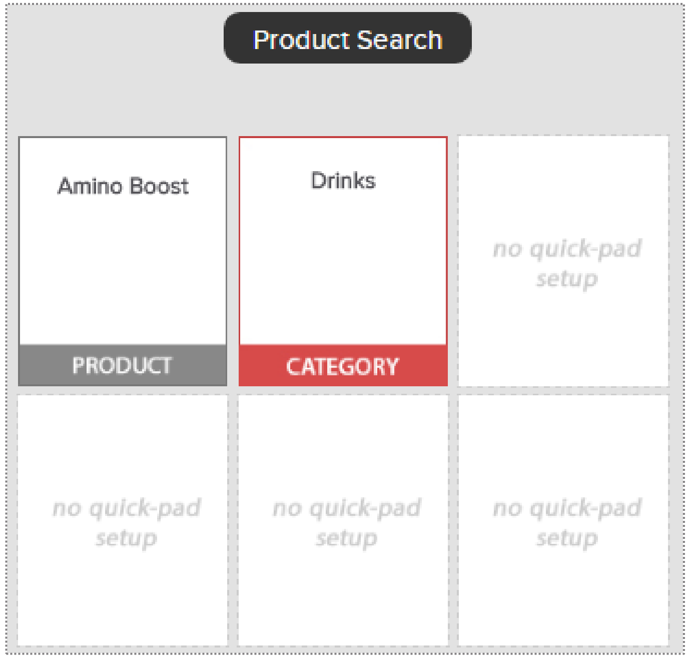
If the client has any invoices that are due, they will automatically populate in the POS shopping cart. You can also access the client's **Future Invoices** to take payment on an invoice not yet due. Any unfinished transactions can be resumed by selecting the **Incomplete Carts** button. **Paid Invoices**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

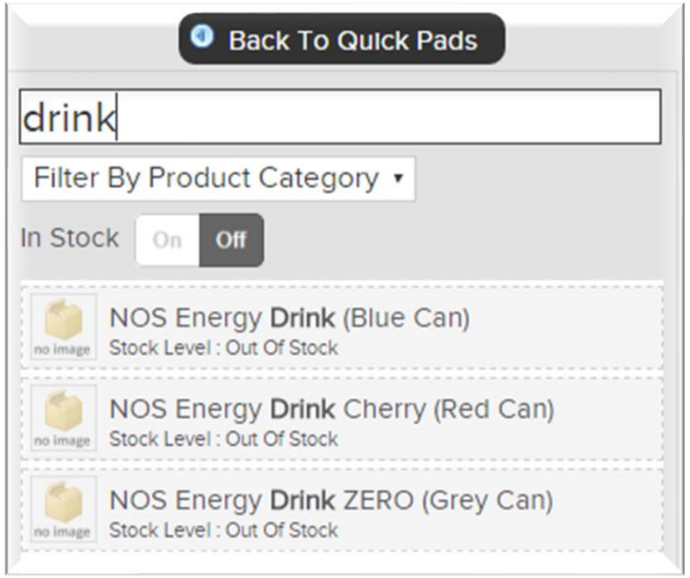




POS: Selecting a Product

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.

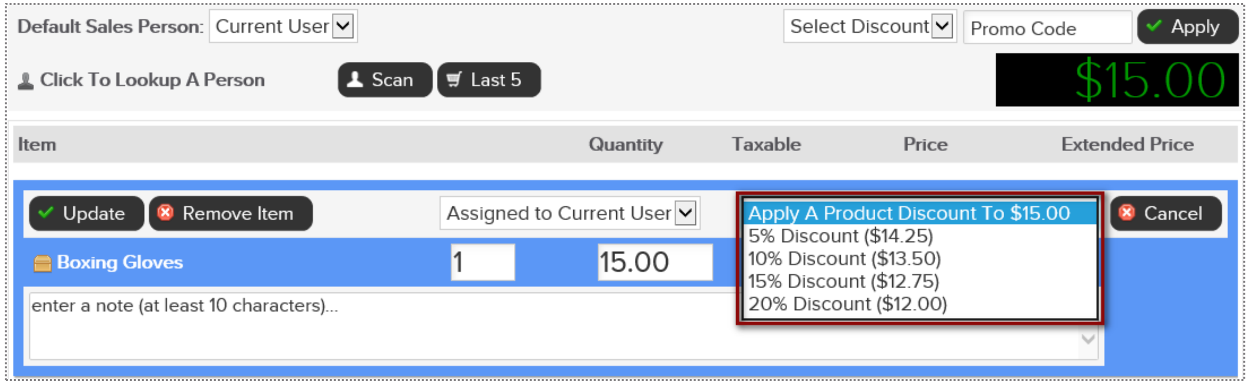


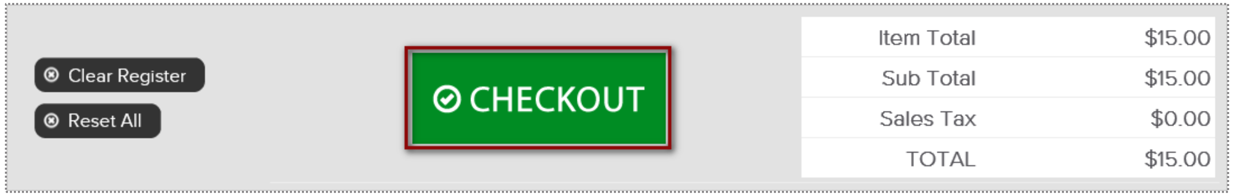


POS: Editing & Checking Out

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

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





POS: Applying a Promo Code

At the upper right hand corner of your register screen there is a drop down menu where you can **Select Discount.** Use the drop down menu to choose your desired discount, type in the optional promo code, and click on **Apply.**

Products that apply for the selected discount will display a star icon and a note of which discount was applied and how much was saved off of the product price.

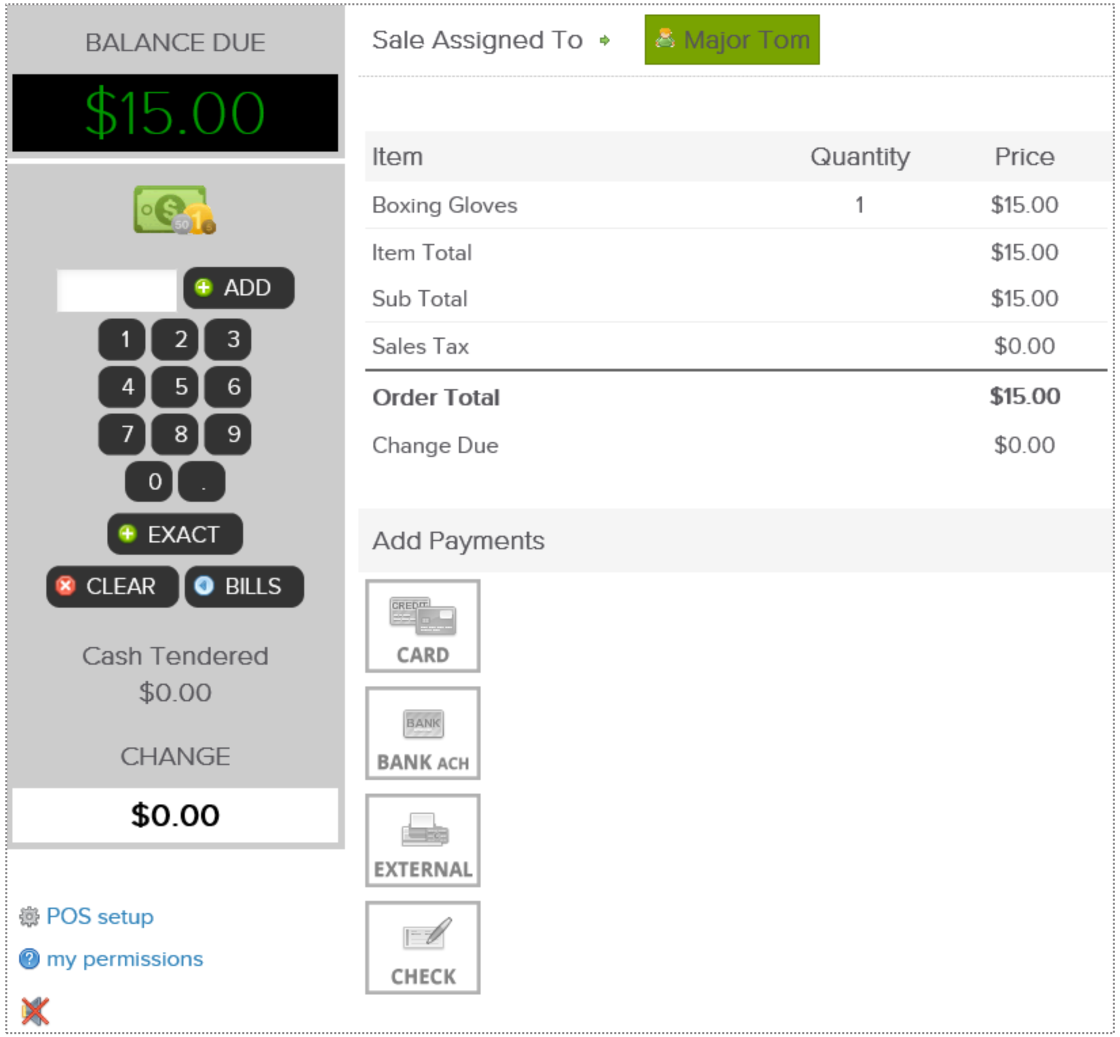
When ready, click the **CHECKOUT** button to advance to the payment screen.

POS: Finalizing the Purchase

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.

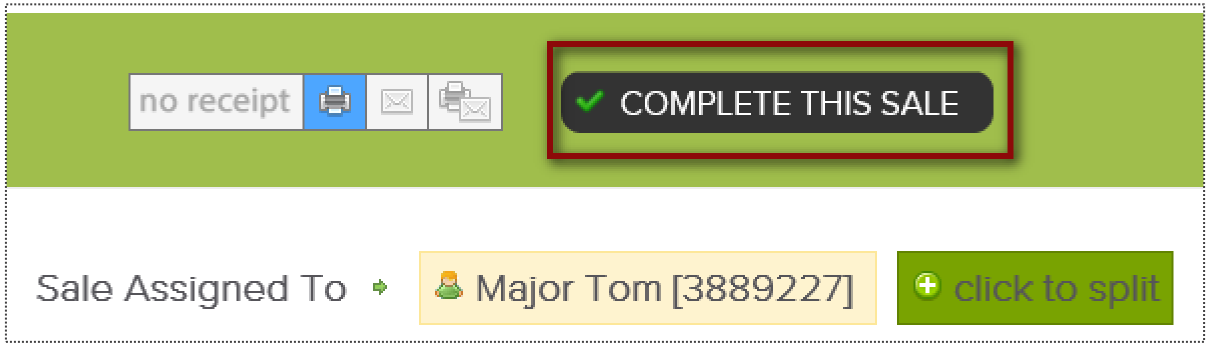
If a customer is paying by cash, select the quick cash amount or click PAD, to enter a specific dollar amount.

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.



POS: Finalizing the Purchase

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.

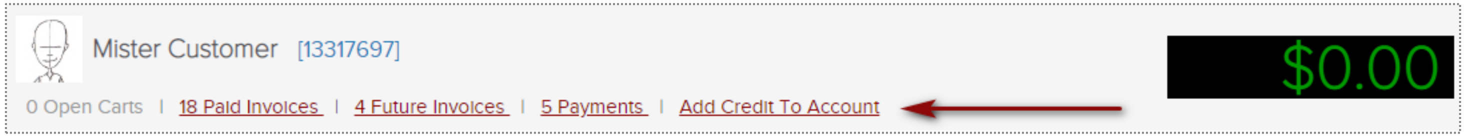


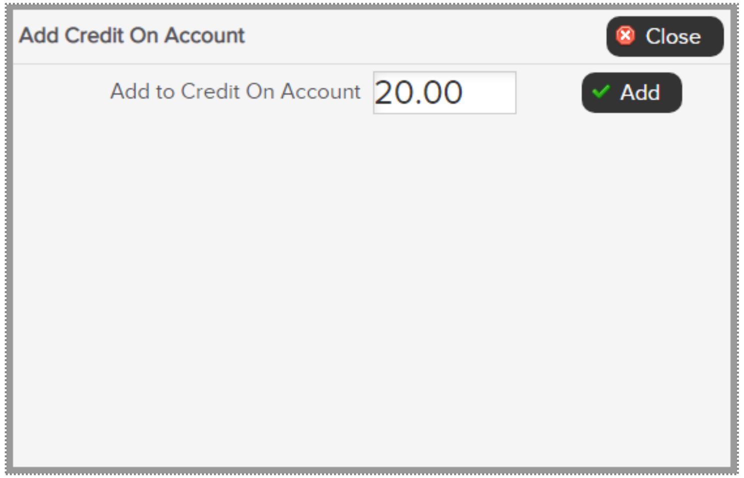
POS: Adding Credit on Account*

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.



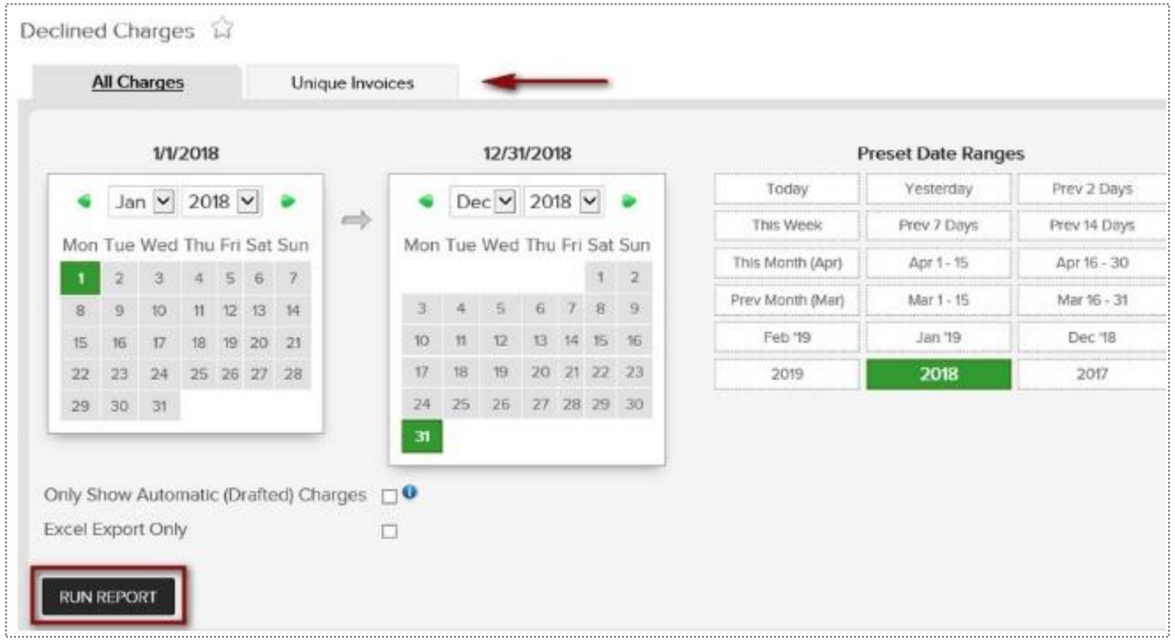


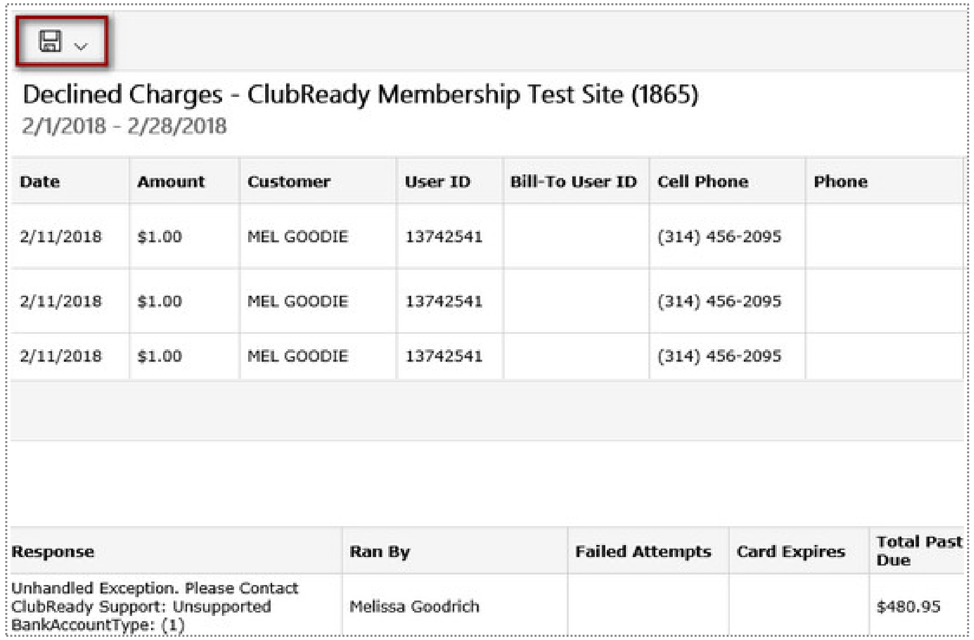
Report: Declined Charges

Reports > Sales > Declined Charges

Choose the date range and use the optional filters. Using filters will allow you to further customize the results of this report. After the report's date range and criteria has been selected, click the **Run Report** button.

The details will display **customer's name, decline reason, date, amount of the invoice, etc**.





Declined Charges - ClubReady Membership Test Site (1865)
2/1/2018 - 2/28/2018

Date	Amount	Customer	User ID	Bill-To User ID	Cell Phone	Phone
2/11/2018	$1.00	MEL GOODIE	13742541		(314) 456-2095	
2/11/2018	$1.00	MEL GOODIE	13742541		(314) 456-2095	
2/11/2018	$1.00	MEL GOODIE	13742541		(314) 456-2095	

Response	Ran By	Failed Attempts	Card Expires	Total Past Due
Unhandled Exception. Please Contact ClubReady Support: Unsupported BankAccountType: (1)	Melissa Goodrich			$480.95

Inventory

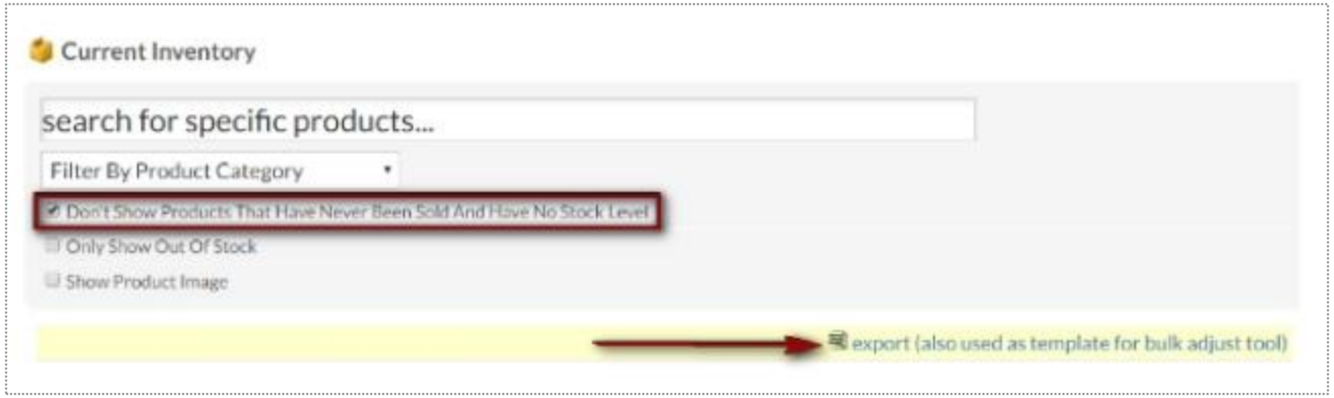
Report: Bulk Upload Inventory

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.



Report: Bulk Upload Inventory

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**.

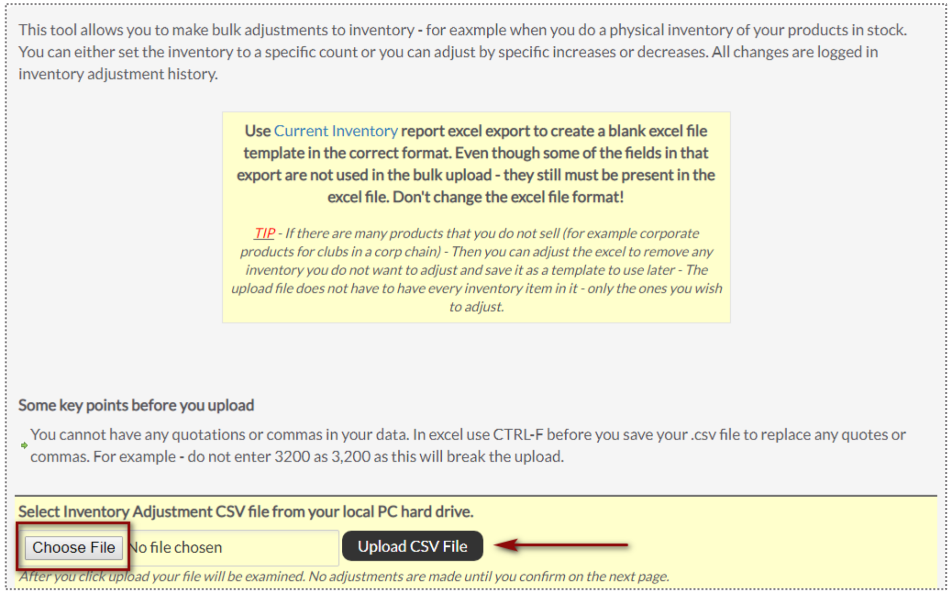
	A	B	C	D	E	F	G	H	I
1	**CR Membership Training Site - Filtered Product Inventory Listing : 5/24/2016**								
2	***This file can be used for bulk inventory adjustments - format must remain the same. After adding adjustment entries in green columns save as .csv file***								
3	**ProductID**	**ProductCode**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

Report: Bulk Upload Inventory

Navigate to **Reports > 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

Initial Class Details Setup

Prior to scheduling your classes, you will need to make sure to update your classes details. To edit classes click **Setup** > **Scheduling** tab > **Classes/Group** tab > click next to class to edit; things to edit down below:

Sales Tax dropdown. You can use the setup sales taxes button next to dropdown, if you have not already setup taxes for the club.

Standard Cost - Standard cost is your standard rate you pay an instructor. Instructors can have different costs setup, but this is the default. **Instructors** tab will allow for instructor specific pay.

Max Attendees Per Class - When this number of bookings is reached then the class will be full and no further bookings will be allowed.

Booking Policy – Preset Class Booking Policies are in system. For club specific policy changes, please reach out to DFO.

Note: Only staff with adequate permissions may change these settings.

Grid View: Schedule a Service

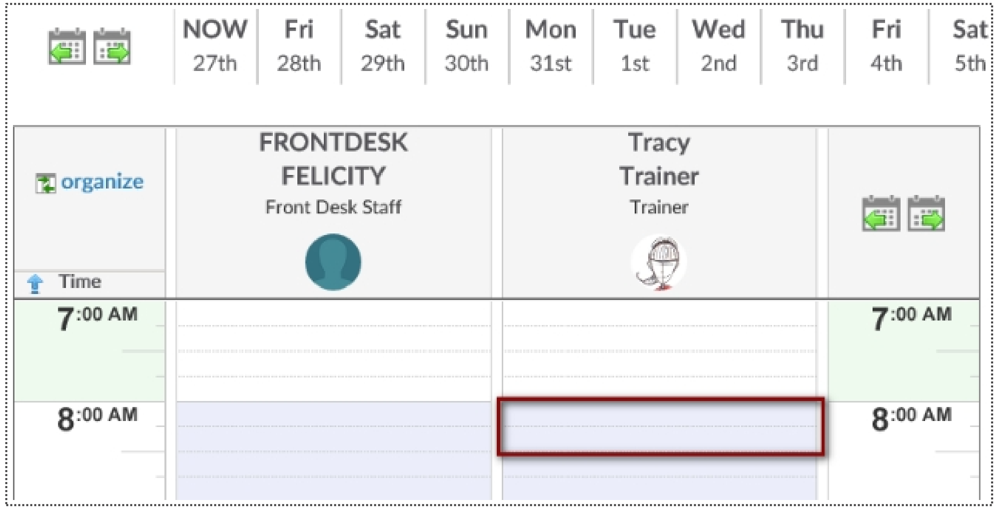
1-on-1 services are scheduled via the Grid View. Select the date and click on the beginning time block under the provider performing the service.

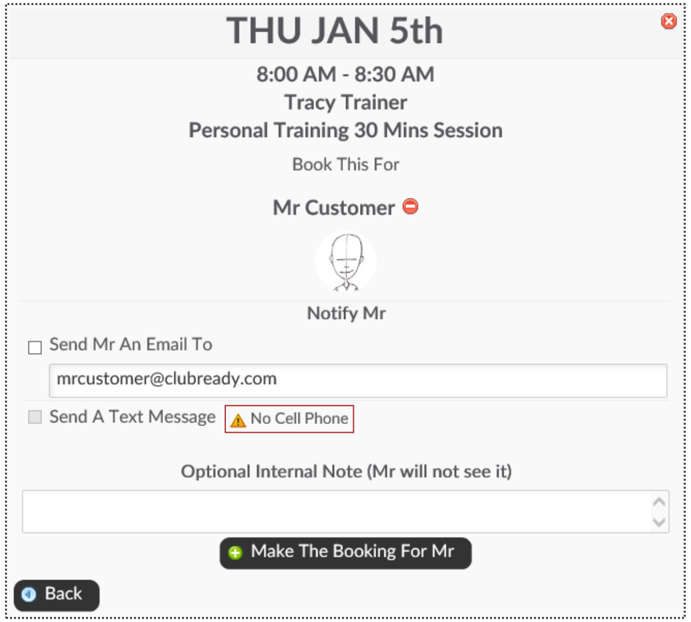
Click the **Add New Booking** button. Select the desired service and use the search box to search for your client.

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

Select **Make The Booking** to complete.

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

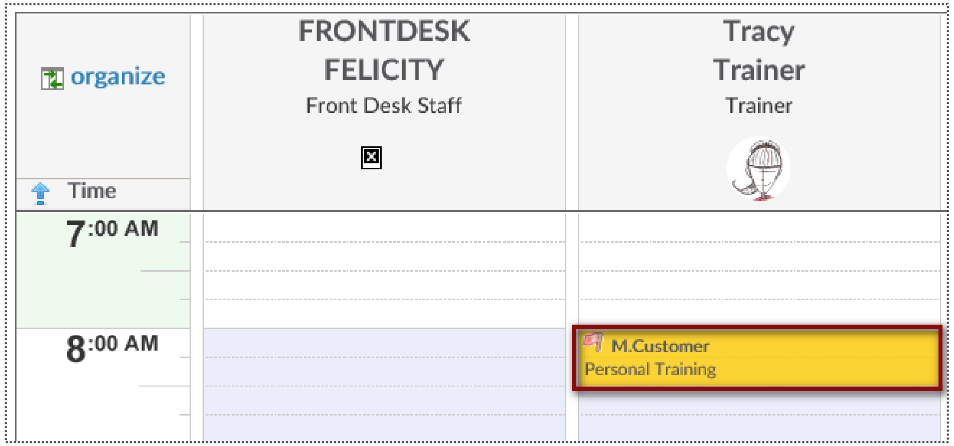


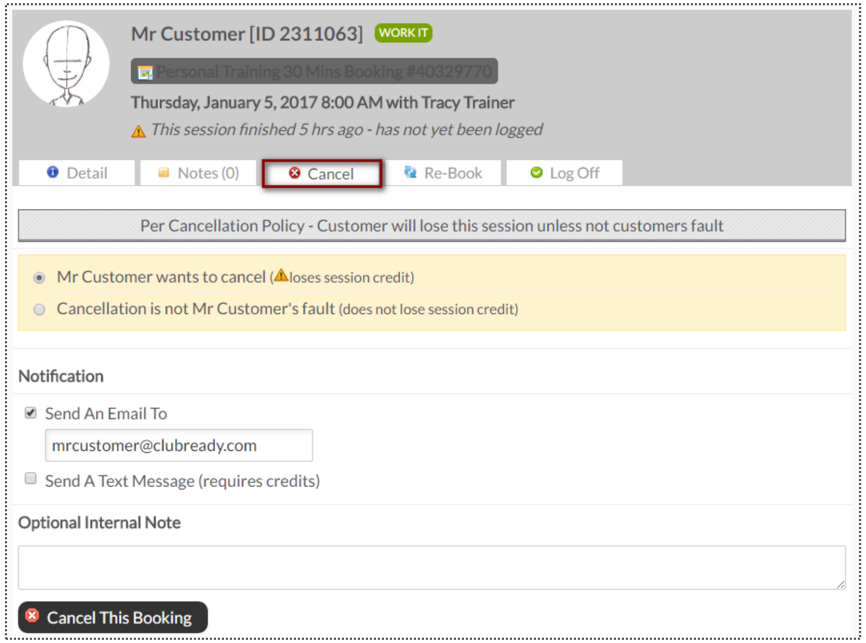


Grid View: Cancel a Booking

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

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



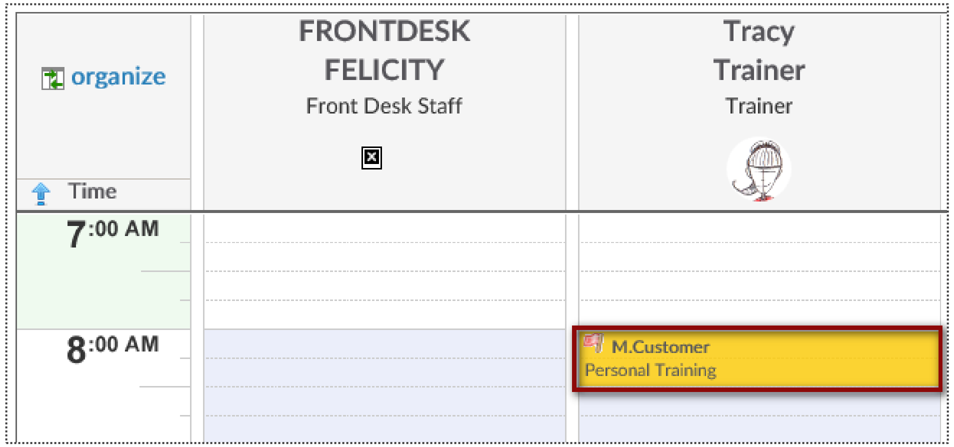


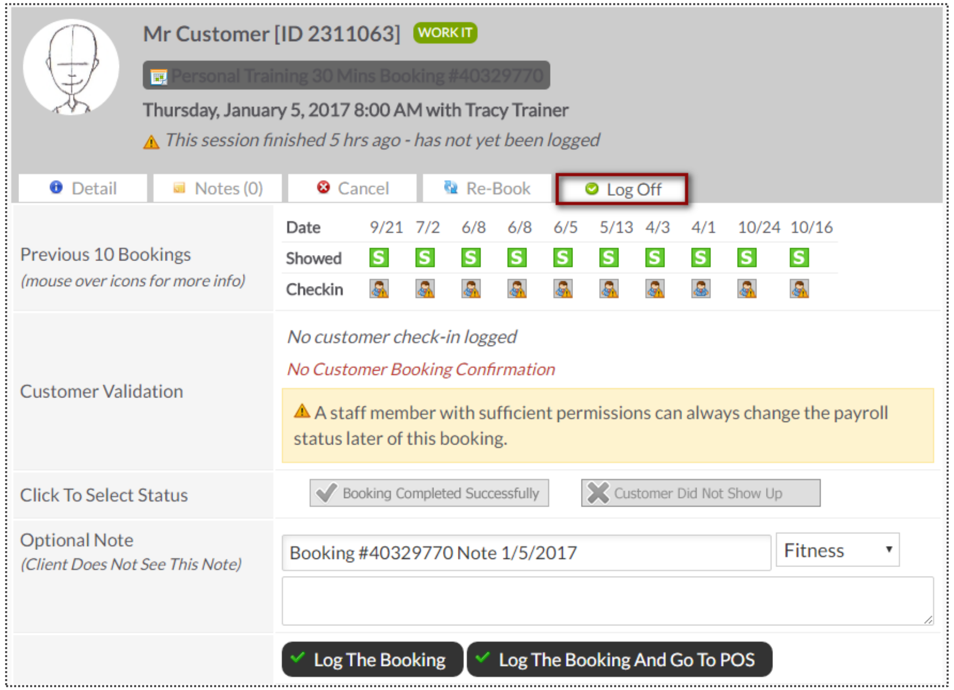
Grid View: Manually Log a Session

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

To log a booking click the **Log Off** tab.

Select whether to log the session as successfully completed or as a no show. Click **Log This Booking** to complete the process.

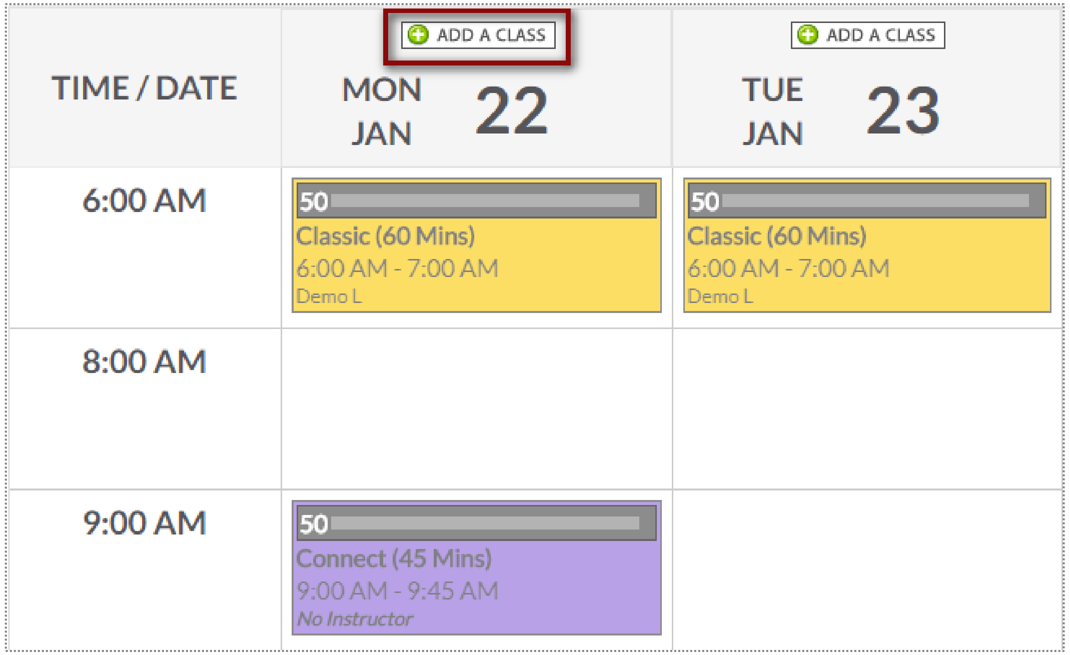


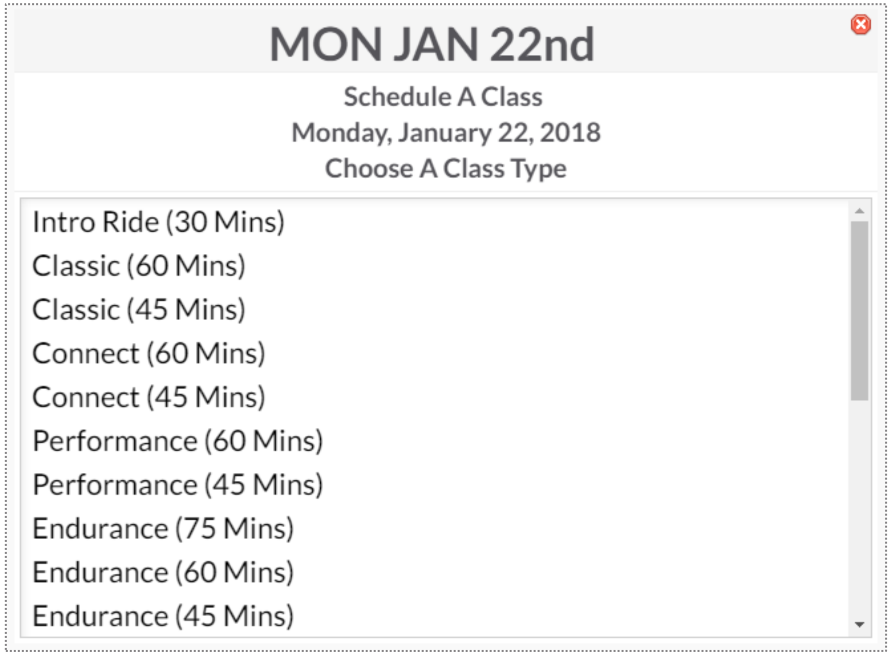


Classes: Add a Class to the Schedule

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

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



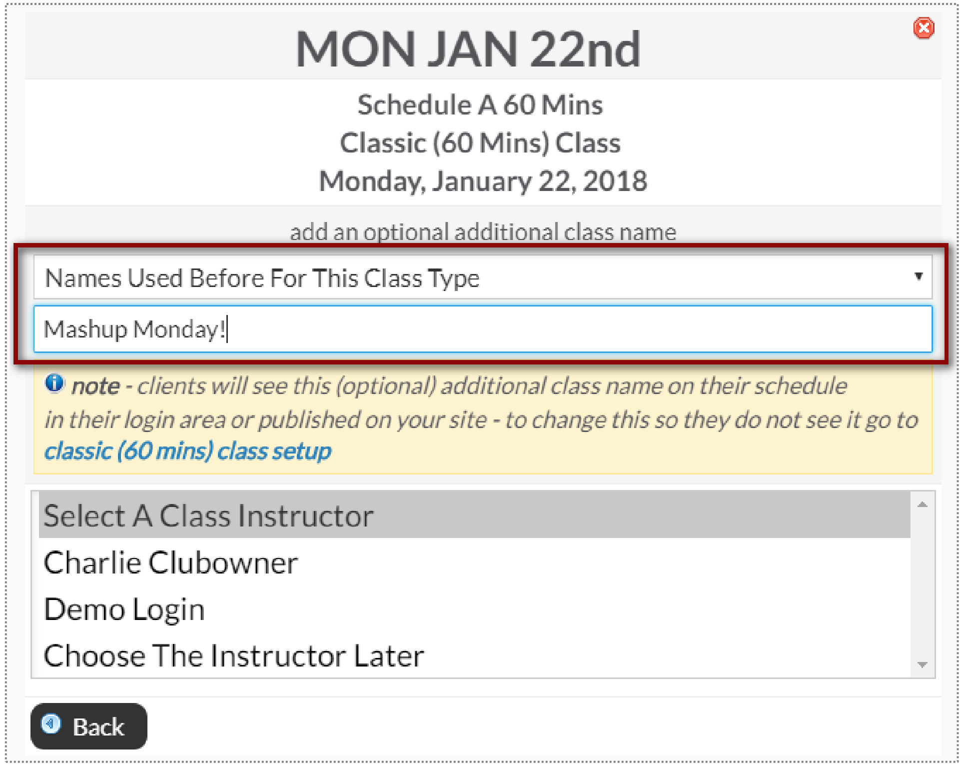


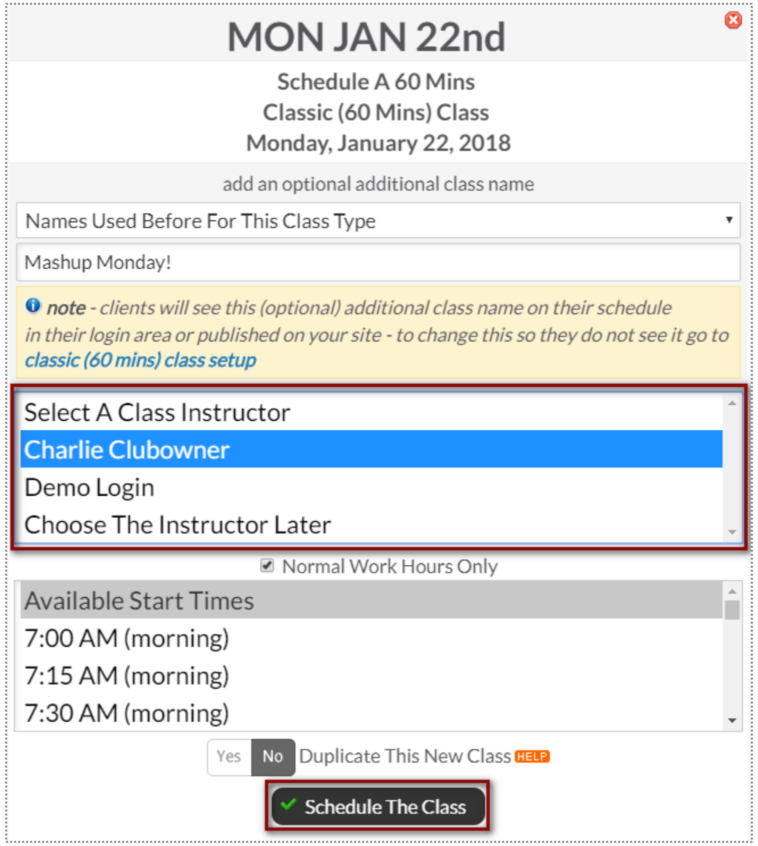
Classes: Add a Class to the Schedule

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.





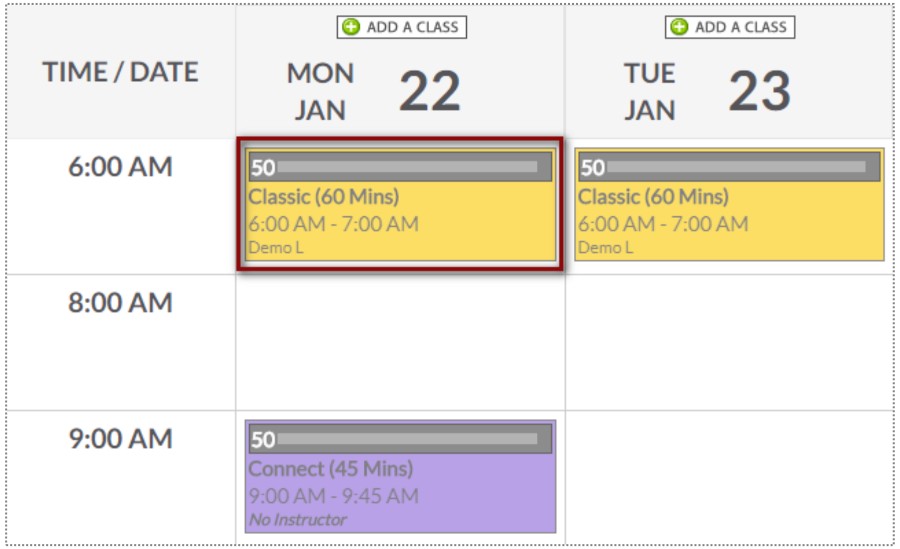
Classes: Schedule a Class Booking

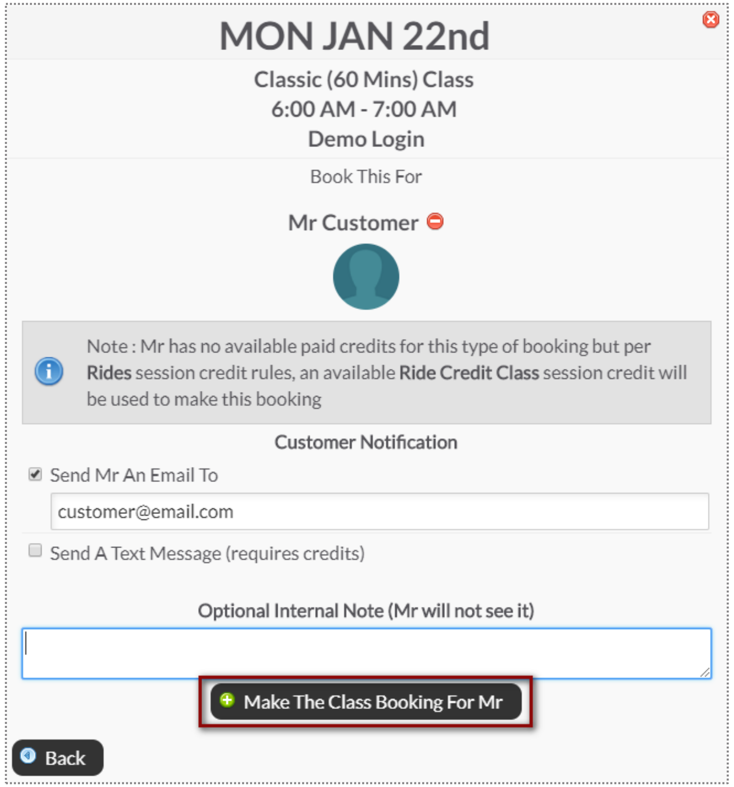
Locate and select the class you want to book customer into. Click the option to **Make A New Booking**.

Use the search box to locate your client. **Send An Email To or Send A Text Message** to notify your client of their booking.

Select **Make The Class The Booking** to complete.

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



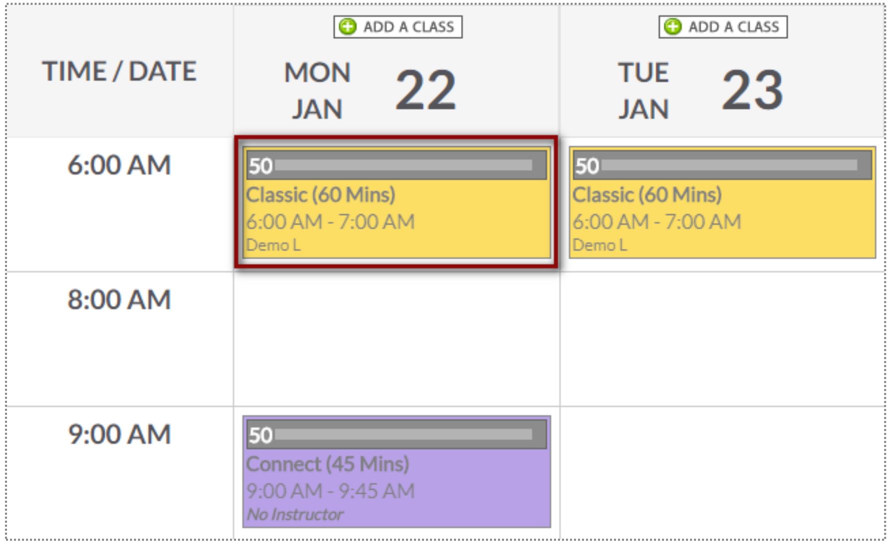


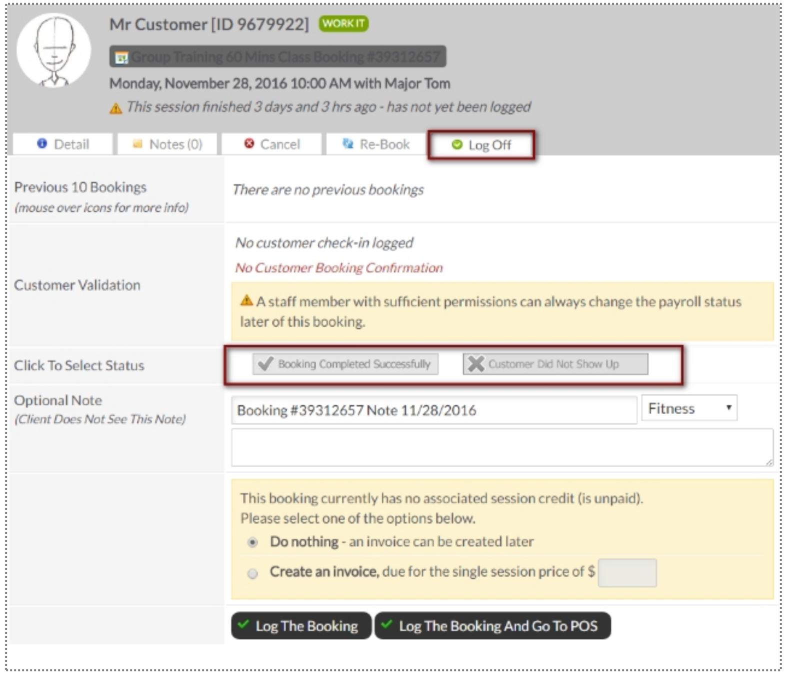
Classes: Manually Log a Session

Locate the desired class and click on it. Clicking on the class will open up the class detail screen. Locate the client that you wish to log their session and click on the **booking id** link.

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.





First Time Guest

How to book a first-time guest. With a specific class type, First Visitor(s), a club can track more granular data (using Sales Process report) as a membership consult.

Consult Benefits & Requirements

This can give a club incites into show percentage and closing percentage by staff type.

Another benefit to First Visitor(s) consult, a member/staff can book this consult at any time of the day and does not have to be into a class; which can allow for more personal one-on-one touch with the prospect.

Additionally, the prospect will receive a reminder of the start of the Consult and not the class; this can help with the prospect showing up with ample time prior to the start of class.

Requirements:

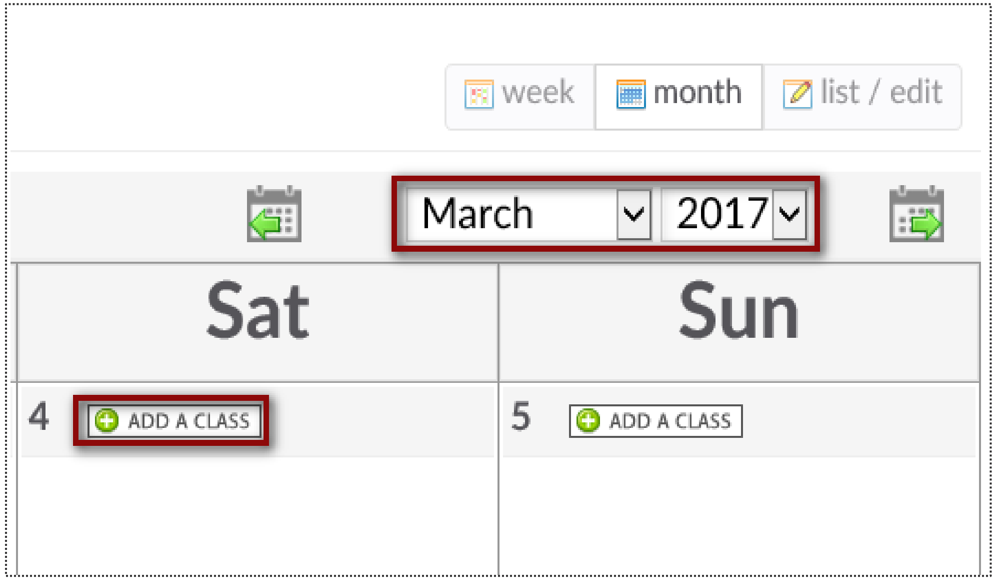
1. All Sales staff members must be enabled for scheduling of the class type/consult “First Visitor(s)”.
2. Must have Sales staff permission type or higher.

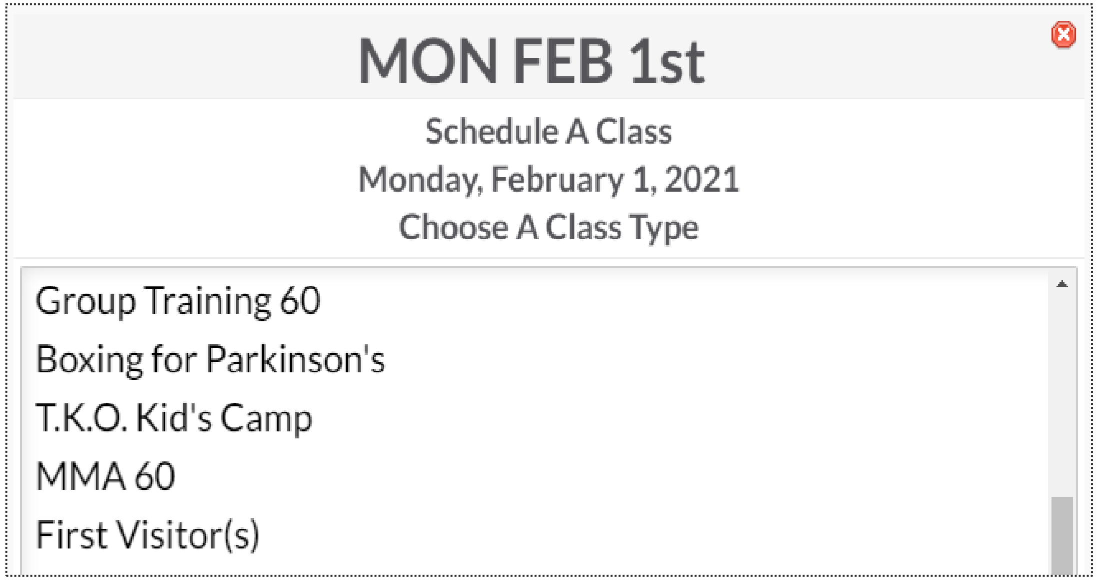
Execution

Schedule the First Visitor(s) class (typically scheduled at least 15mins before a class):

Bookings > Classes > Week view or Month view > Choose the day > “+ ADD A CLASS”

Choose day > Choose First Visitor.





Execution

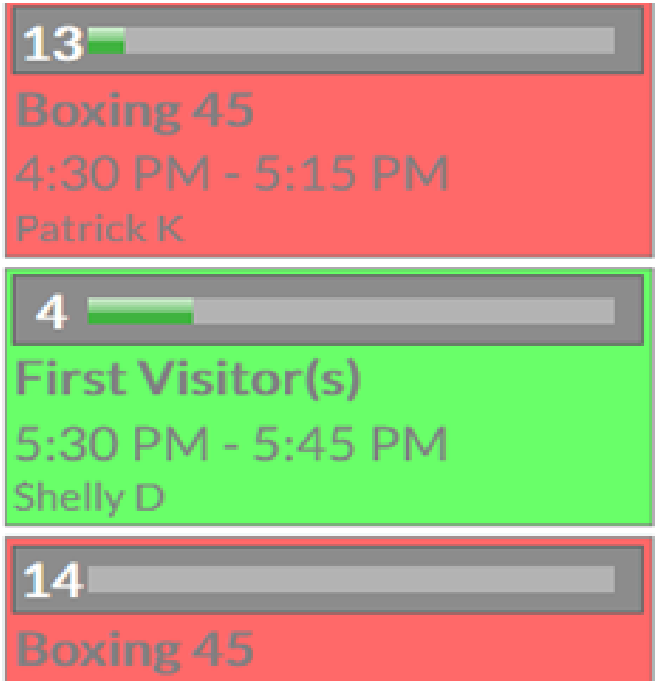
Choose Sales team member and time of day and click schedule

Once the booking is set, the appointment will appear on the staff calendar in “Grid View’, on the “Classes” view and in the “Day List” for the scheduled day

a. It will appear as a class, but will not be visible for members.

b. Day of, log the appointment as “Show” or “No Show”, just like a typical class attendee.

c. For the best experience, it is recommended 1 FTG per 1 staff member.



Adding a Prospect to the First Visitor Consult

Option 1 – from Classes screen

1. Bookings > Classes > any view > Click on specific First Visitor(s) consult; if the class is not at that specific time complete steps to schedule the First Visitor(s) class shown above.
2. Click “Make A New Class Book” > search/click prospect > “Make The Class Booking For XXXX”

Option 2 – from the prospect Work It tab

1. When working a prospect from the “Work It” screen > Fast Book > Consults > First Visitor(s) > pick day > pick time > make booking

NOTE: if a day and time are not available, you will need to schedule the class/consult first

If the prospect still wants to take a class before joining, we can book them in a class after their appointment (if space allows), or schedule them for another day/time. They are welcome to observe a class.

A trial class or intro offer will need to be sold to them in order to take a class.

If a prospect is going to try a class, we must book them into that specific class as well, but it is strongly encouraged to have them become a member prior to taking a class

Reporting: First Bookings

Prospects who have taken a first class can be found in Reports.

Reports > Members > Active Members > First Bookings

NOTE: As long as a prospect has been booked and showed into a class, they will show in this report.

13 Prospects with One Completed Booking- TITLE Boxing Club - Demo (8793)
As of 2/2/2021 10:31 AM (EST)

User ID	First Name	Last Name	Prospect Type	Booking ID	Booking Date	Booking Time	Booking Owner	Booking Type	Phone	Cell Phone	Email
74170083	Victoria	Feliciano	Show - Missed Sale	183309818	2/2/2021	9:30 AM	Sales Test	First Visitor(s)		1231234123	test@te

Reporting: Sales Process

Reports > Intelligence > Sales Process > Only Membership Consults

Sales Process Metrics - TITLE Boxing Club - Demo (8793)
Membership Consults - Close Tied to Staff Member Who Sold Deal
1/30/2021 - 2/1/2021

Staff Name	User Id	Prospects Added	Consults Scheduled By	Consults Scheduled With	Showed	Show Rate	Scheduled Converted	Close Rate	Converted Not Scheduled with Salesperson	Total Invoice	Total Gross
Sara Myers	74652682	0	0	0	0	0.0%	0	0.0%	1	$109.00	$0.00
Totals		**0**	**0**	**0**	**0**	**0.0%**	**0**	**0.0%**	**1**	**$109.00**	**$0.00**

Reporting: Waiver Conversions

Reports > Intelligence > Waiver Conversions

TOTALS	7	0	3	42.9%
	Waiver Count *leads added during report range*	New Waiver Members *lead added during report range has waiver*	All New Members *during report range*	Conversion % All New Members / Waiver Count
	7	0	3	42.9%

Reporting: Sales Package for Trial Class or Intro Offer

Reports > Members > Members by Package > Trial Class (Service) use dropdown

22 Unique Member Packages - TITLE Boxing Club -

Package Type: Trial Class (309078)

As of 2/03/2021 1:42 PM EST

Name	User ID	Email

Reporting: First Visitor Class Attendance

Reports > Members > Class Attendance

This report will show all shows and no shows to the First Visitor(s) class. Important the club Shows or No Shows the prospect on the day of appointment. Complete column will show completed visits

Class Attendance - TITLE Boxing Club - State Line (10678)

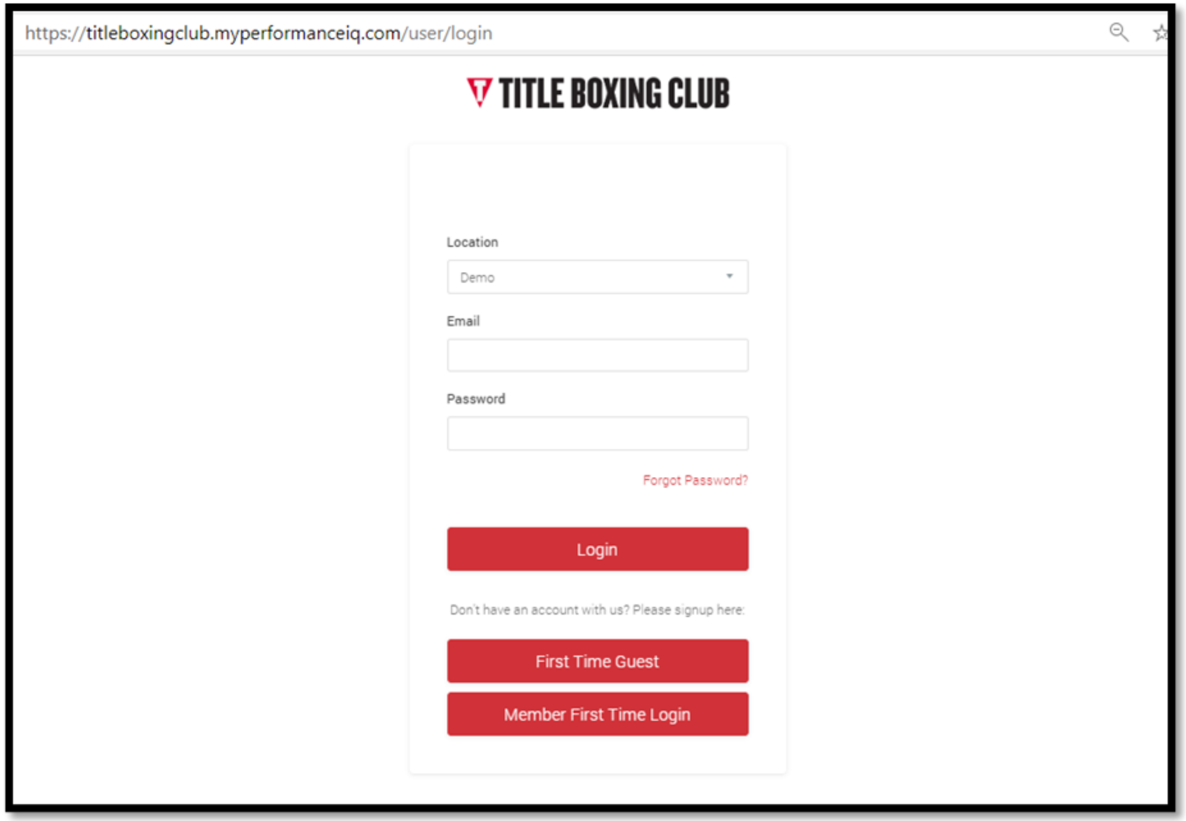
1 Classes - 1 Instructors - 9 Members

2/1/2021 - 2/3/2021

TOTALS:	7	25.7 %	22.9 %	35	9	8	0	0	1
TITLE Boxing Club - State Line (10678)	Occurrences	% Registered	% Show	Spots	Register	Complete	Cancel	Reschedule	No Show
⊟First Visitor(s) *(56058)*	7	25.7 %	22.9 %	35	9	8	0	0	1
2021-02-01 (Monday)		100.0 %	33.3 %	15	5	5	0	0	0

PerformanceIQ Admin Panel

TITLE Boxing Club Admin Panel: What Is It?

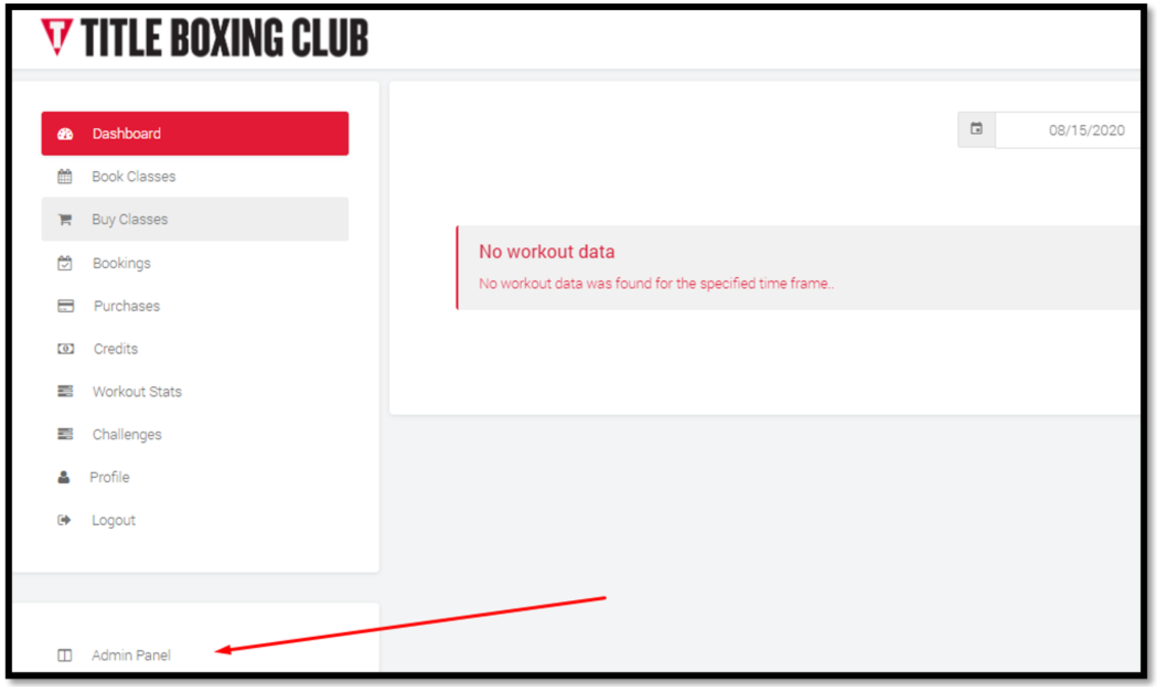


A management site for the app/member portal.

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

TITLE Boxing Club Admin Panel: Logging In

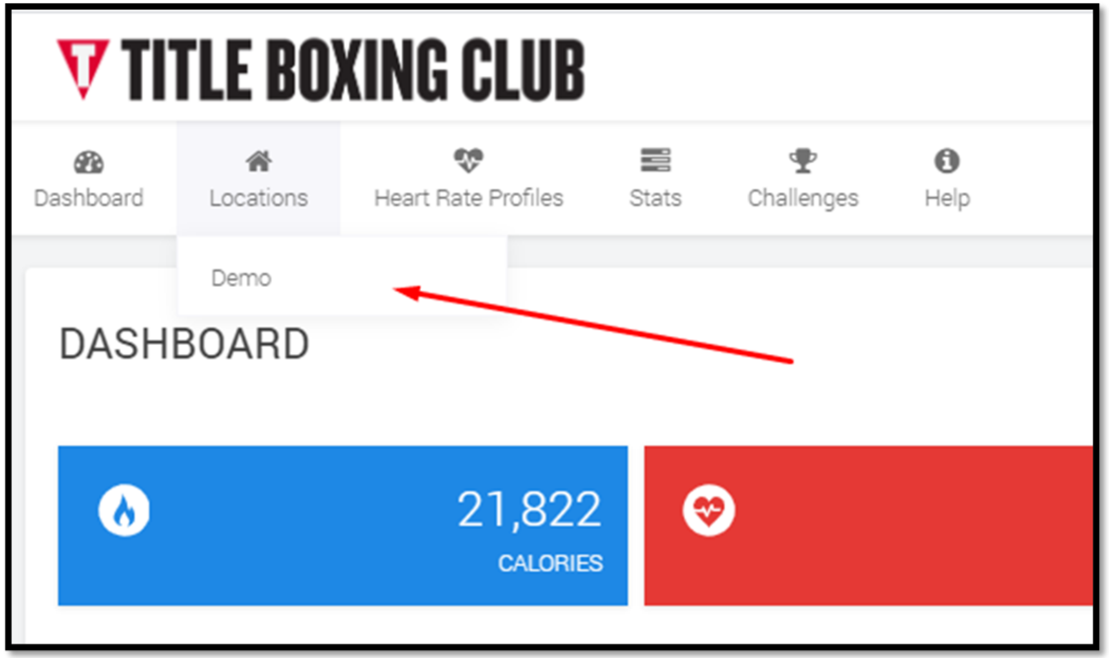


Login URL: https://titleboxingclub.myperformanceiq.com/user/login

Use admin account login credentials.

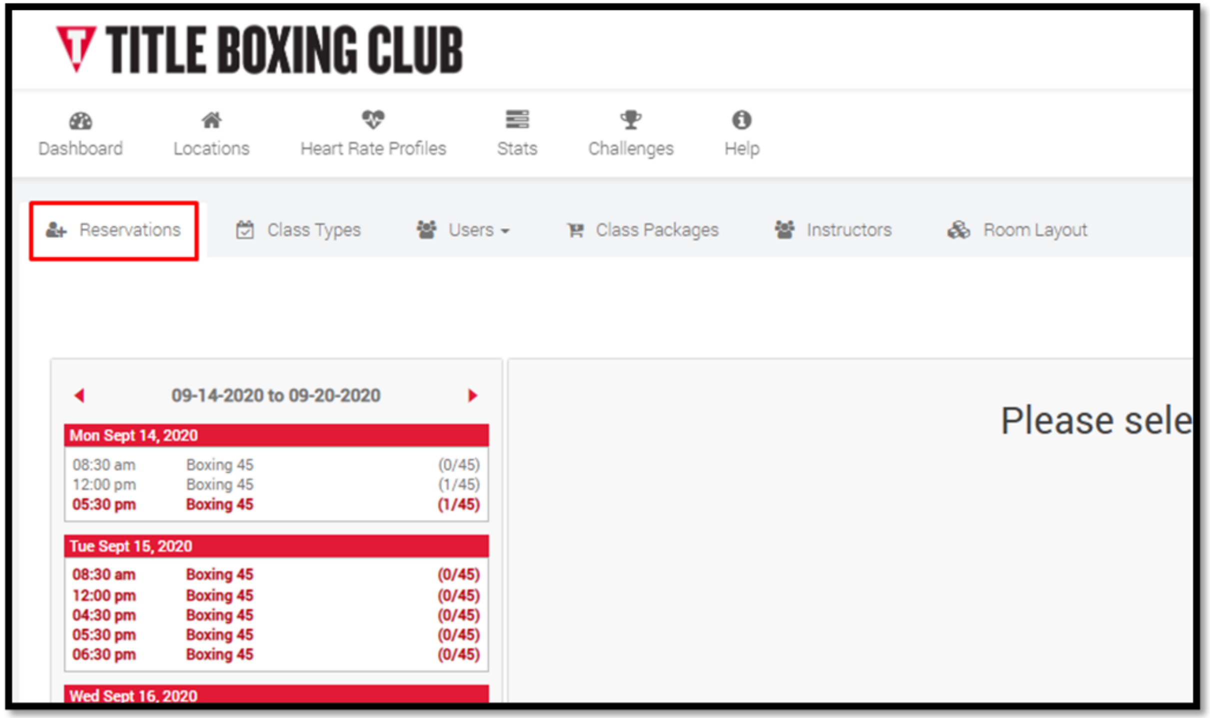
After logging in, click '**Admin Panel**' in the lower left-hand corner of the screen.

TITLE Boxing Club Admin Panel: Locations



To access your specific location, hover over **Locations** and click on your location.

TITLE Boxing Club Admin Panel: Locations > Reservations



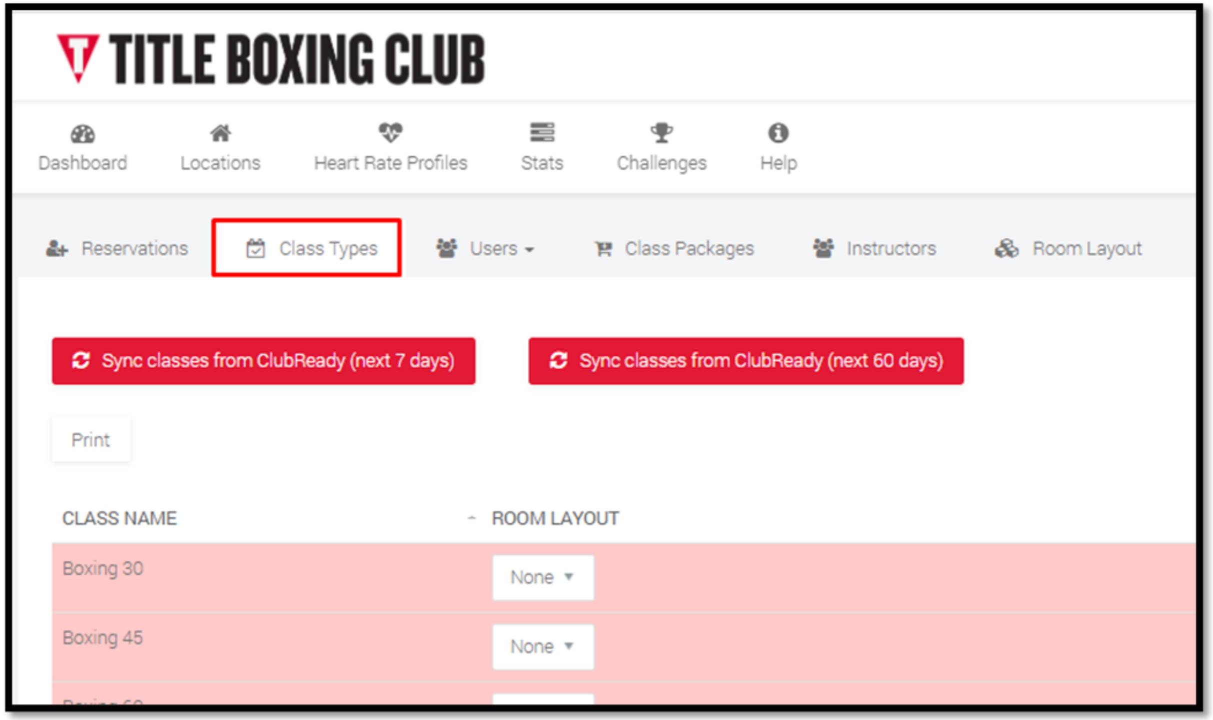
Shows class schedule, class details, and attendees.

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

The reservation can also be cancelled for the attendee.

Staff can also add a new booking in this view.

TITLE Boxing Club Admin Panel: Locations > Class Types

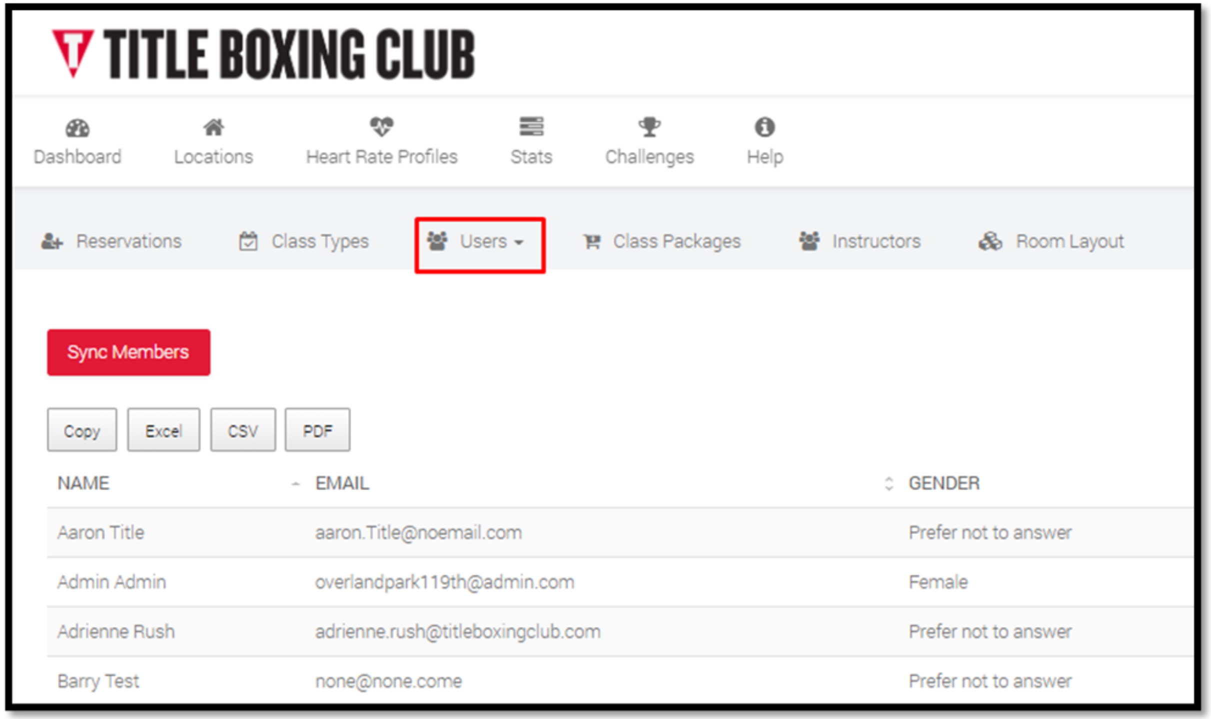


Shows all class types that have been synced from ClubReady that are enabled and visible in the app.

The system will auto sync any schedule changes and class type settings (e.g. max attendee, booking policy, etc.) made in ClubReady every 3 hours.

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

TITLE Boxing Club Admin Panel: Locations > Users



Users tab will show all accounts from your ClubReady site

All Users = all prospects, members, inactive members, staff members

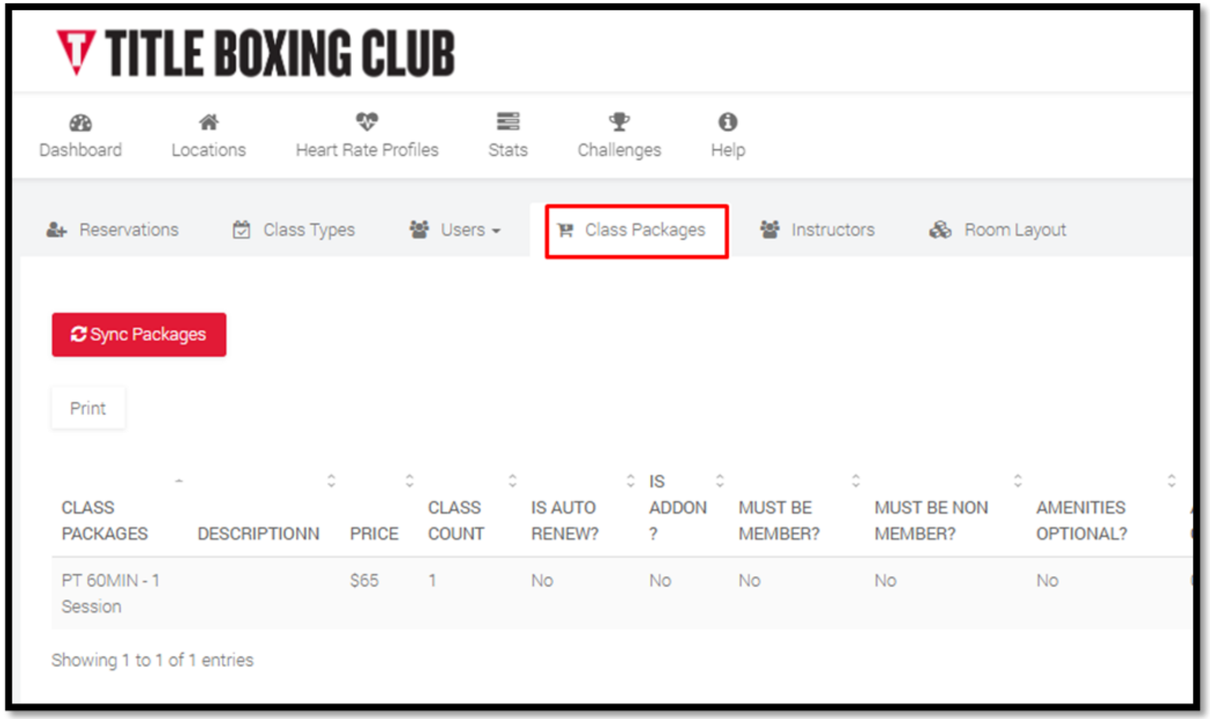
Members = all members

Prospects = all prospects

Inactive = all inactive members

Staff Members = any account with access to the admin dashboard (this is not staff from your ClubReady site)

TITLE Boxing Club Admin Panel: Locations > Class Packages

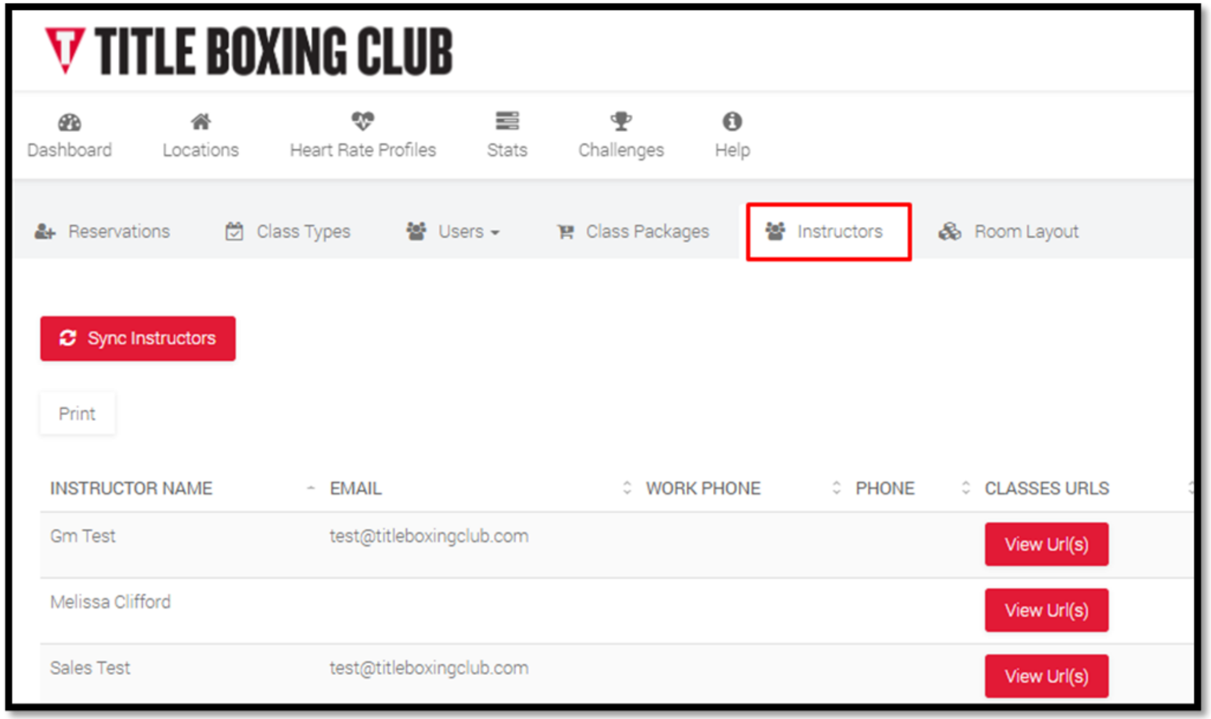


Shows any sales packages that has been setup in your ClubReady site to be sold in the app.

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

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

TITLE Boxing Club Admin Panel: Locations > Instructors

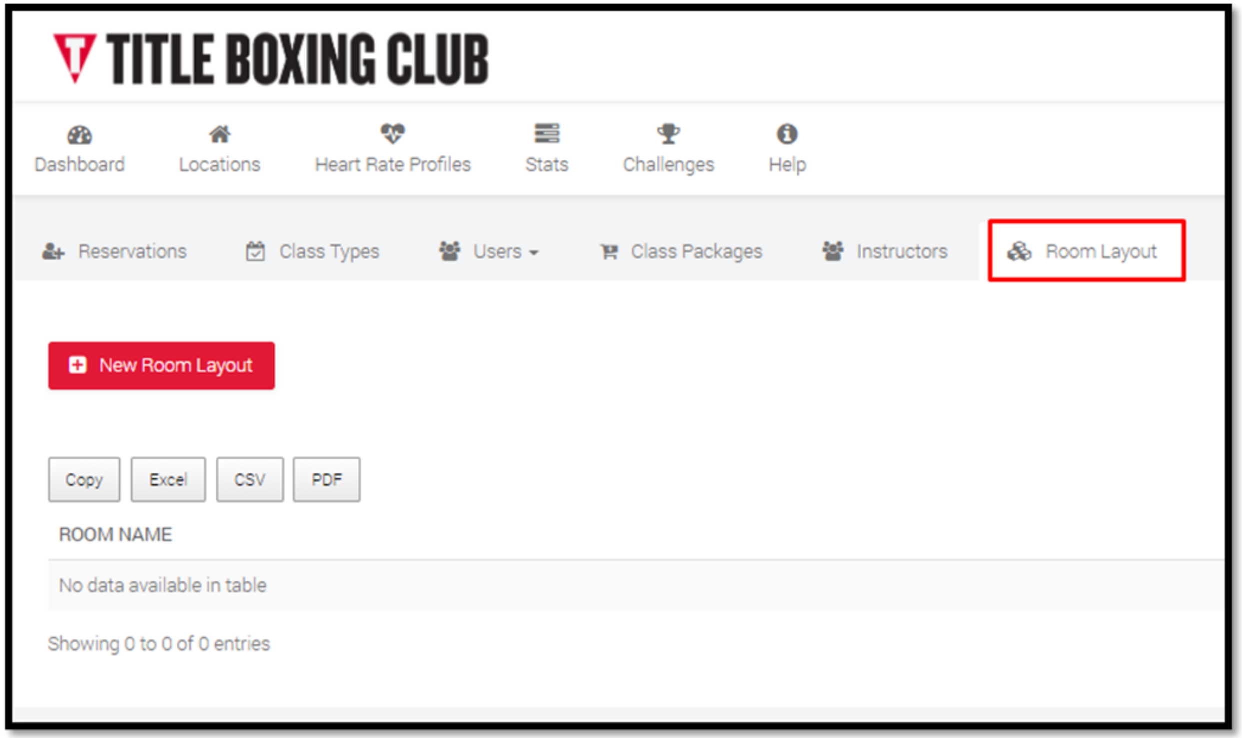


Shows all staff setup for scheduling in your ClubReady site.

If the instructor is not listed here, they will not show in the schedule for online booking. The instructor will need to be completely set up for scheduling in ClubReady.

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

TITLE Boxing Club Admin Panel: Locations > 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.

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

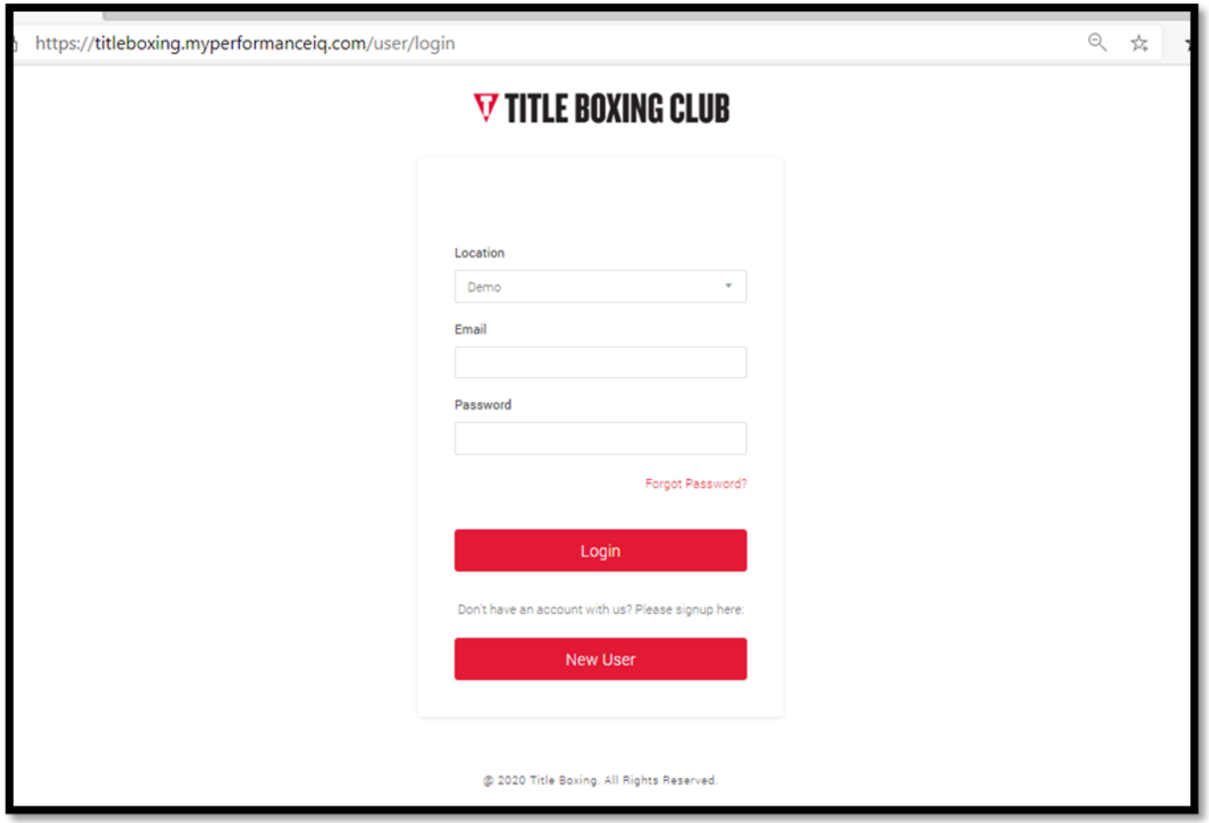
You can create as many different room layouts as needed.

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

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

Check-in Management

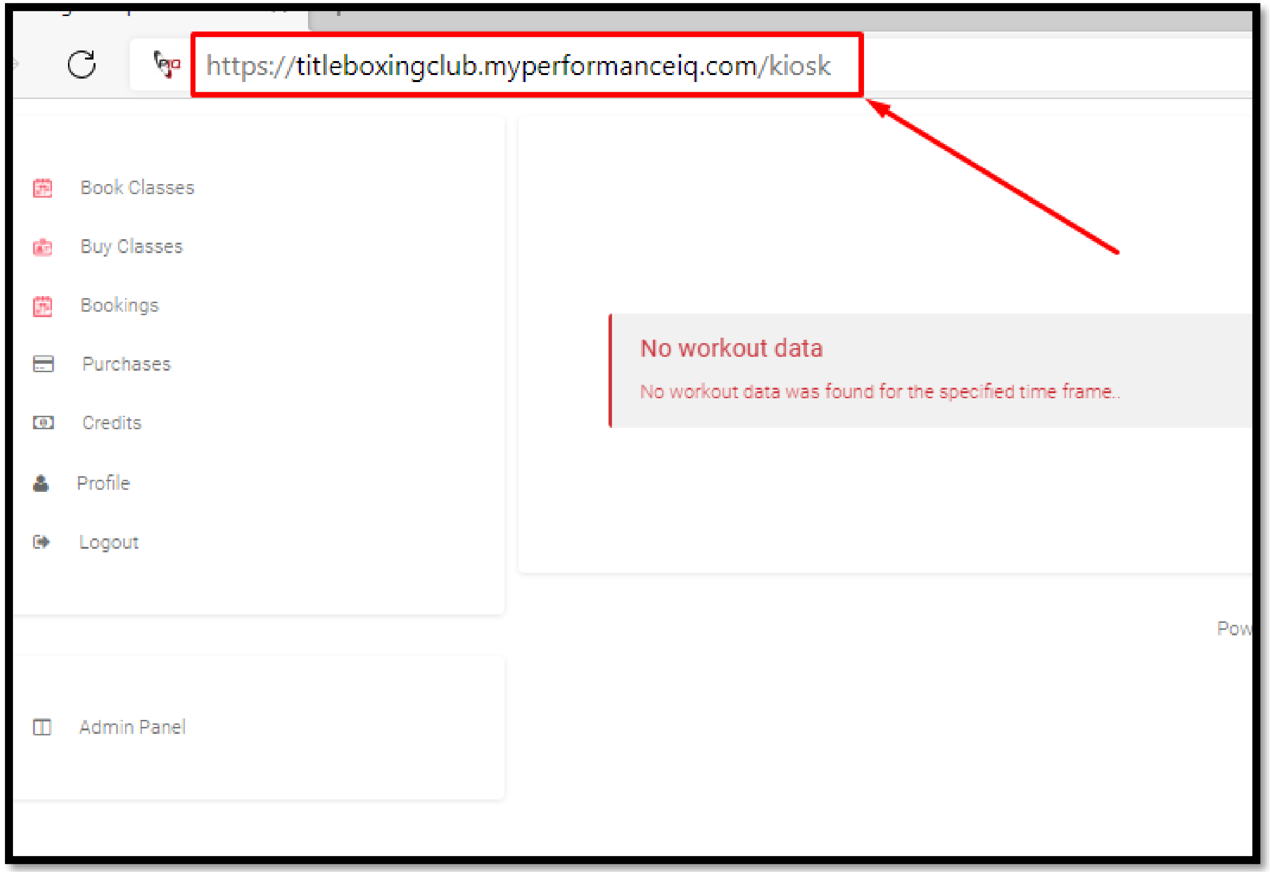
TITLE Boxing Club Check In Kiosk: Logging In



Use the login URL:
https://titleboxing.myperformanceiq.com/user/login

Each location will use their PIQ admin login credentials.

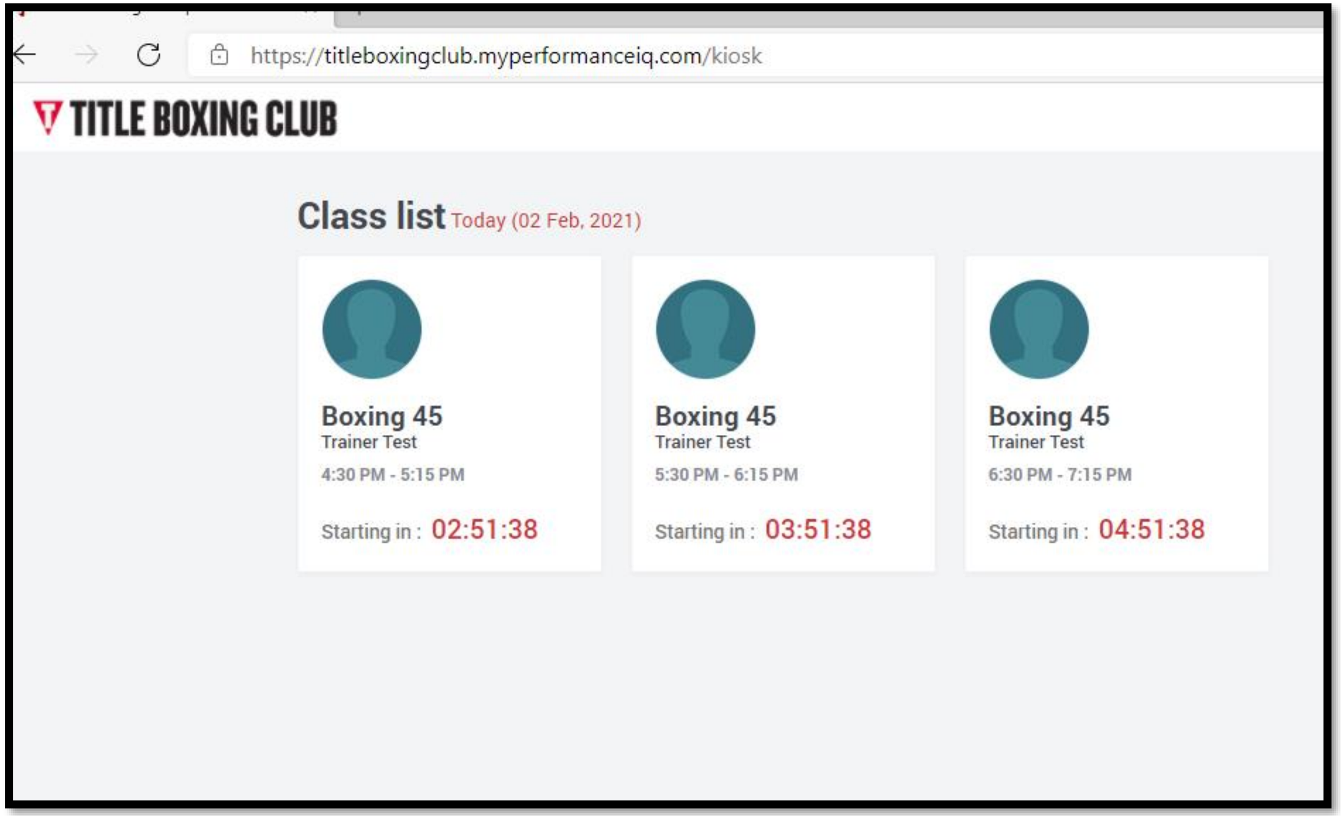
TITLE Boxing Club Check In Kiosk: Enter URL



Once logged in, enter the following URL address: https://titleboxingclub.myperformanceiq.com/kiosk

Be sure to include the 'https://' at the beginning of the URL address.

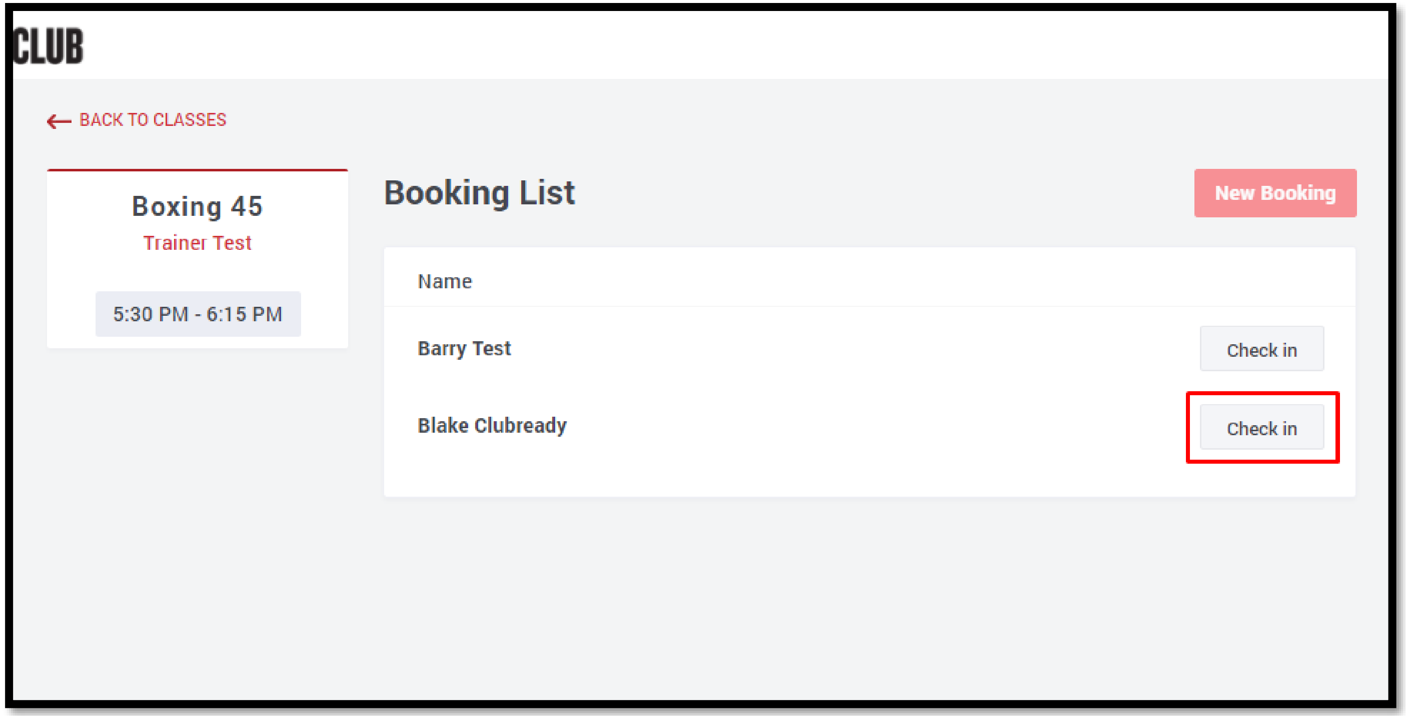
TITLE Boxing Club Check In Kiosk: Class List



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

To add a picture for the instructor, this will need to be uploaded into the instructor's profile in ClubReady.

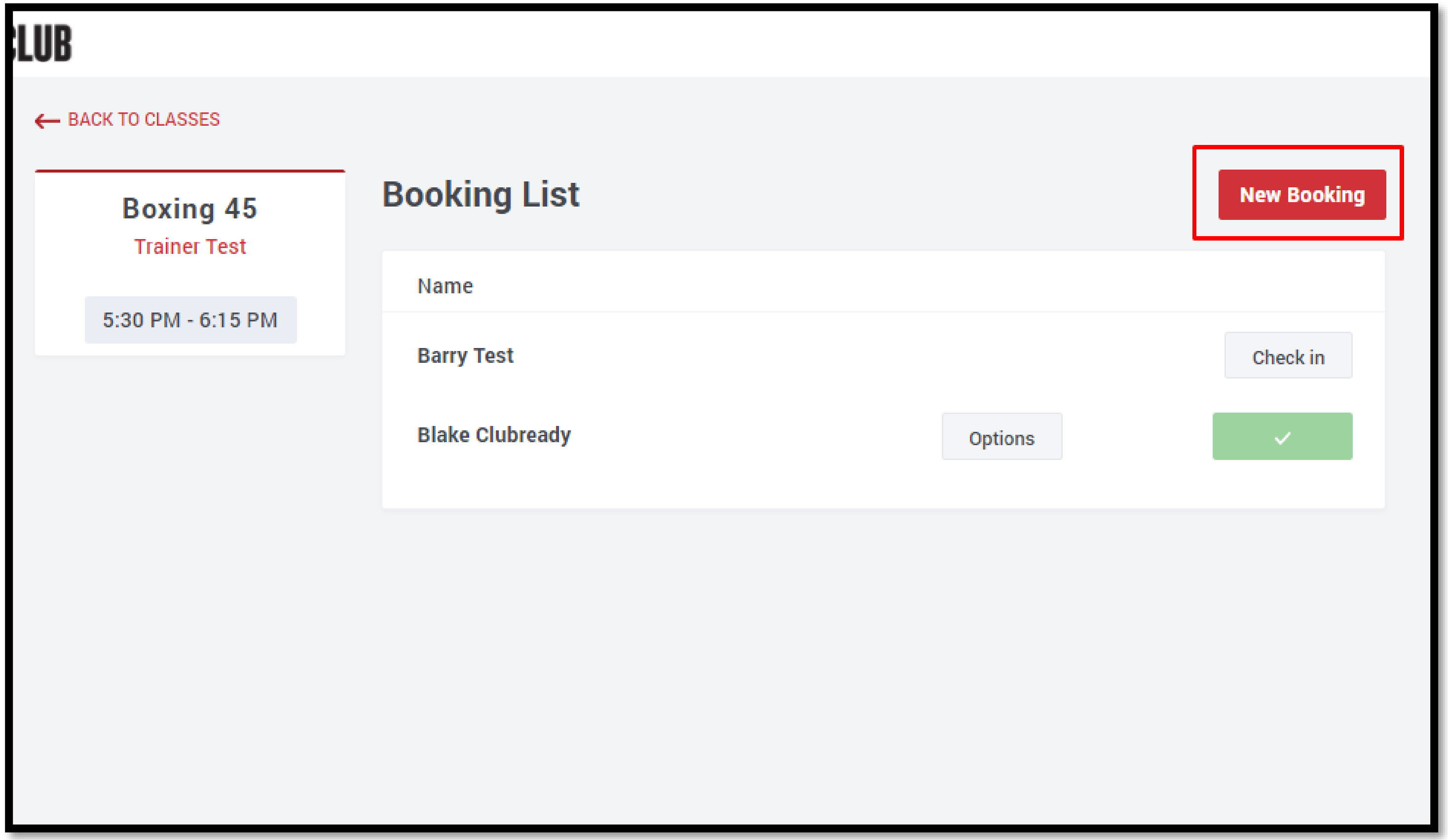
TITLE Boxing Club Check In Kiosk: Checking In



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

Click the ‘Check in’ button next to the attendee’s name to check in to class (will be marked as both a ‘Show’ and counted as a club check-in in ClubReady).

TITLE Boxing Club Check In Kiosk: New Booking



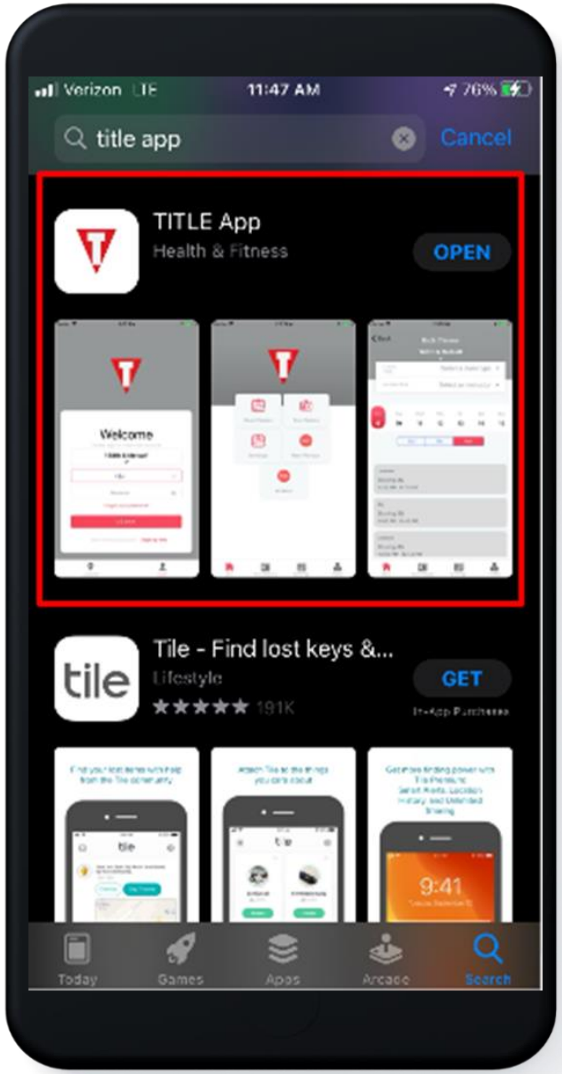
A new booking can be added through the kiosk by selecting the 'New Booking' button.

The user must already have an account in the system.

The user can either search by their phone number or email and will select their name. This will add the user to the class roster where they will then click the 'Check in' button next to their name.

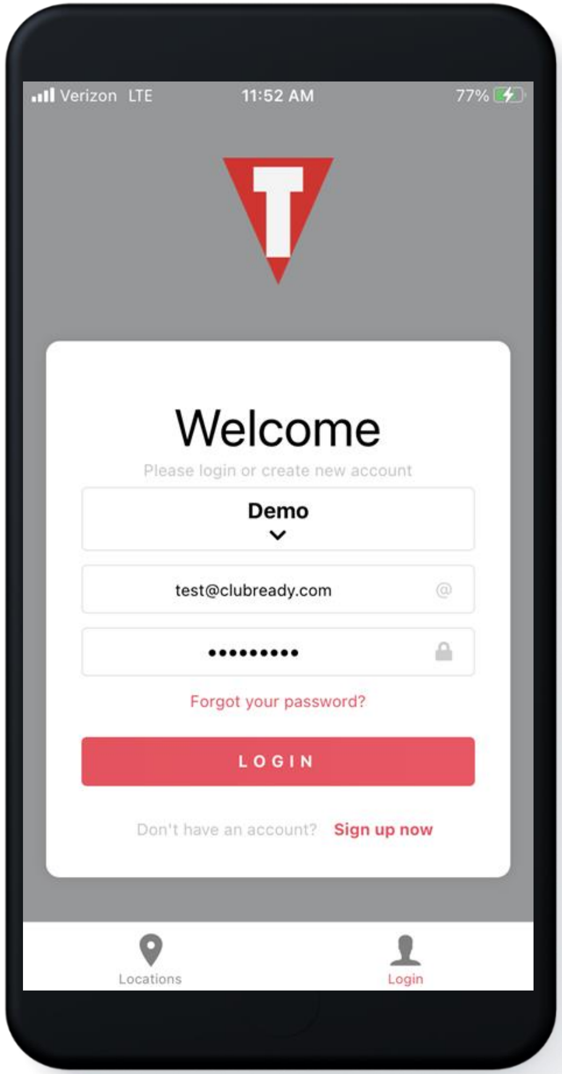
Member App

TITLE Boxing Club Member App: Download



The TITLE Boxing Club Members app is available for iPhone and Android. With your smart phone, search ‘Title App’ and download the app from the Google Play store (if using your Android) or iTunes App Store (if using the iPhone). If Android users have issues with downloading the app, the user will need to update their phone to version 10.

TITLE Boxing Club Member App: Logging In



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.

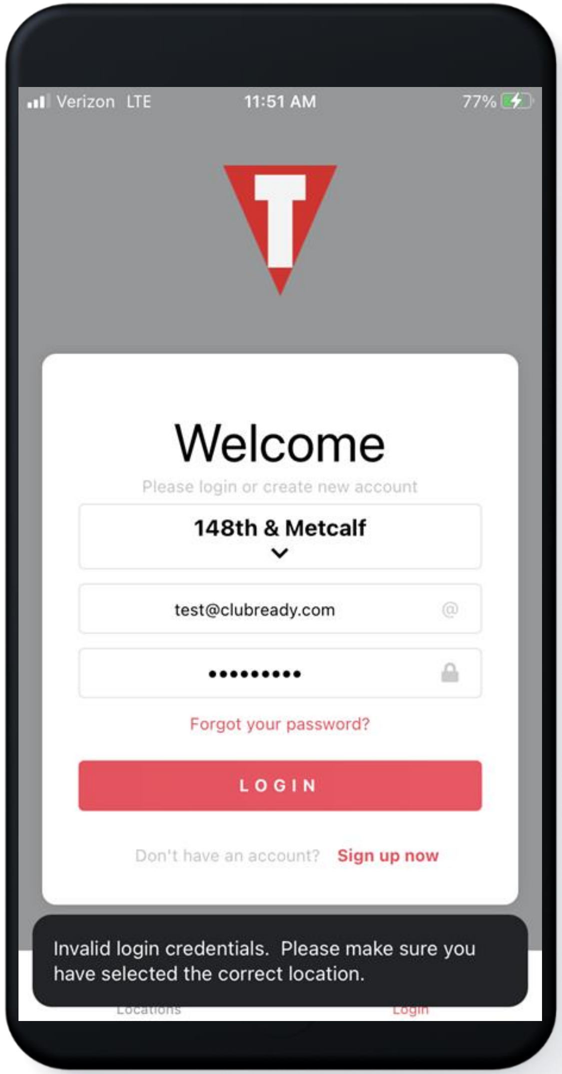
NOTE: The user will not use their ClubReady username.

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

TITLE Boxing Club Member App: Login Troubleshooting



Confirm the user has selected their home location (user may have accounts with the same email at other Title Boxing Club 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.

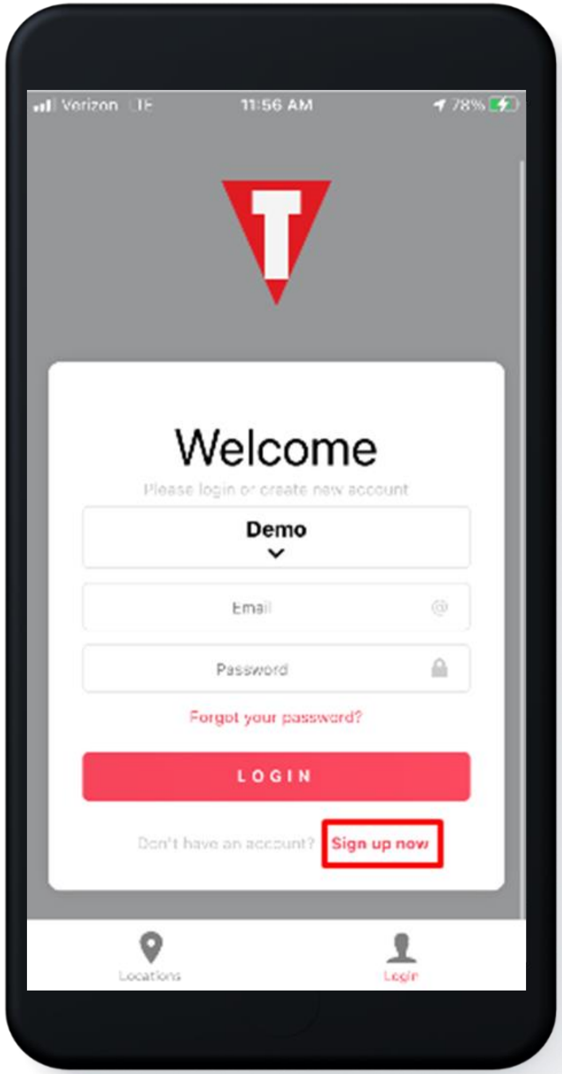
Edit A Customer Profile (where to reset the user's password): https://www.clubready.com/wiki/WK26067540987

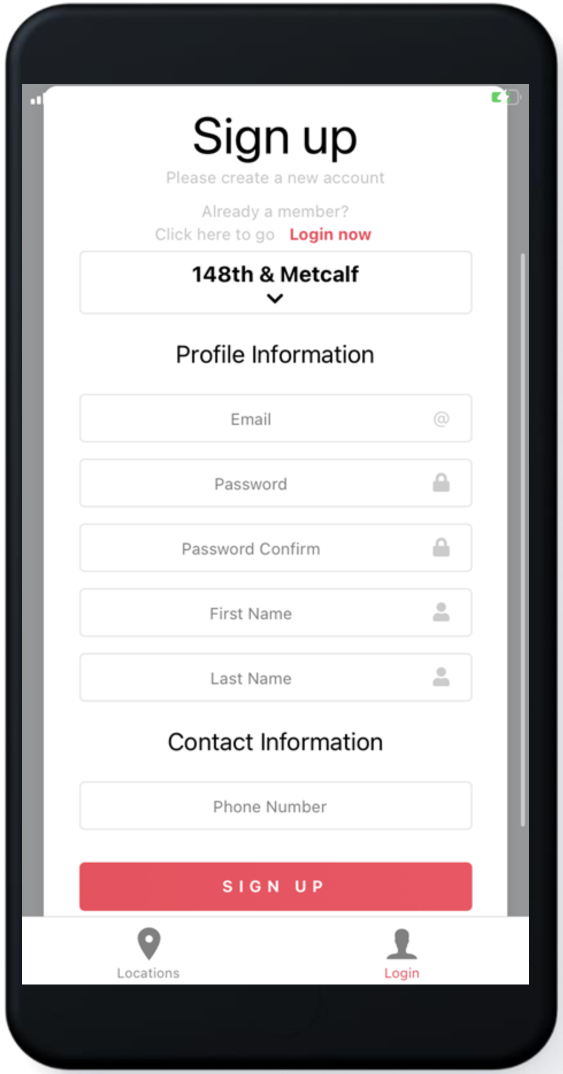
Merge A Duplicate Profile: https://www.clubready.com/wiki/WK19128952393

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

TITLE BOXING CLUB

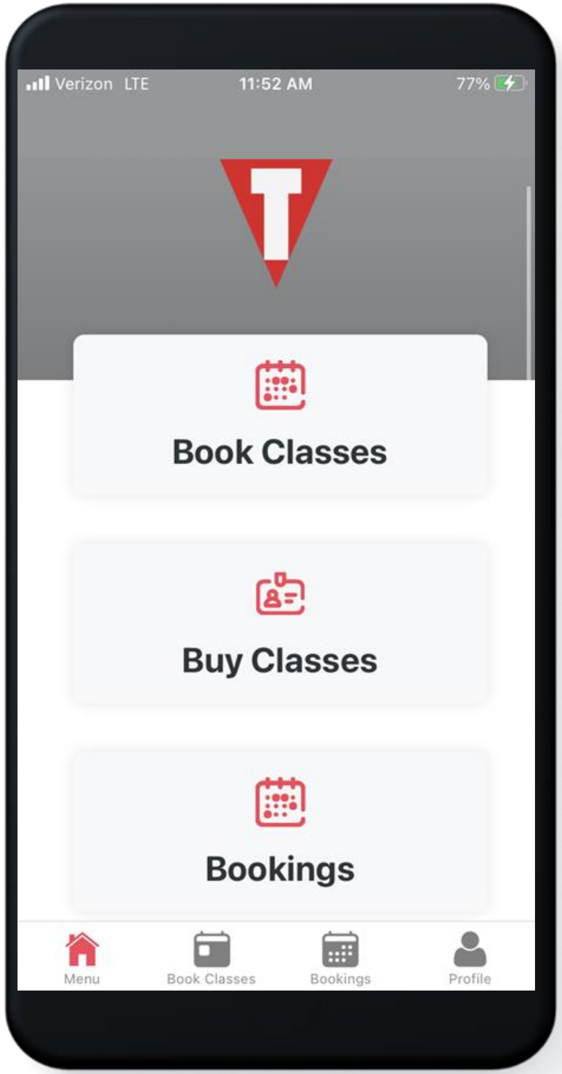
TITLE Boxing Club Member App: New User Sign Up





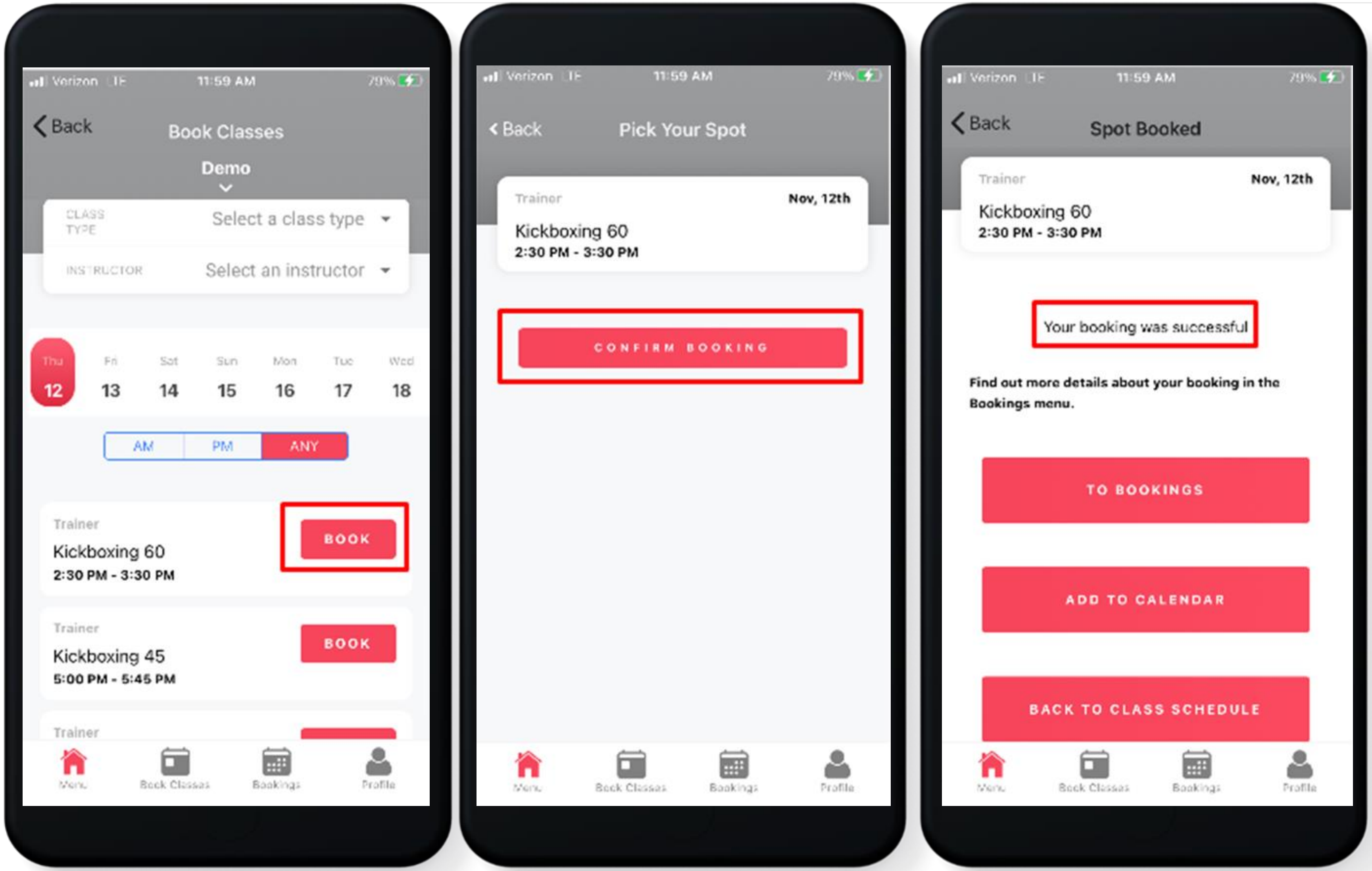
If it is a new user, they can click the **'Sign Up'** link to create a new account.

TITLE Boxing Club Member App: Menu Screen



To book a class, select the **BOOK CLASSES** icon in the main menu.

TITLE Boxing Club Member App: Book a Class

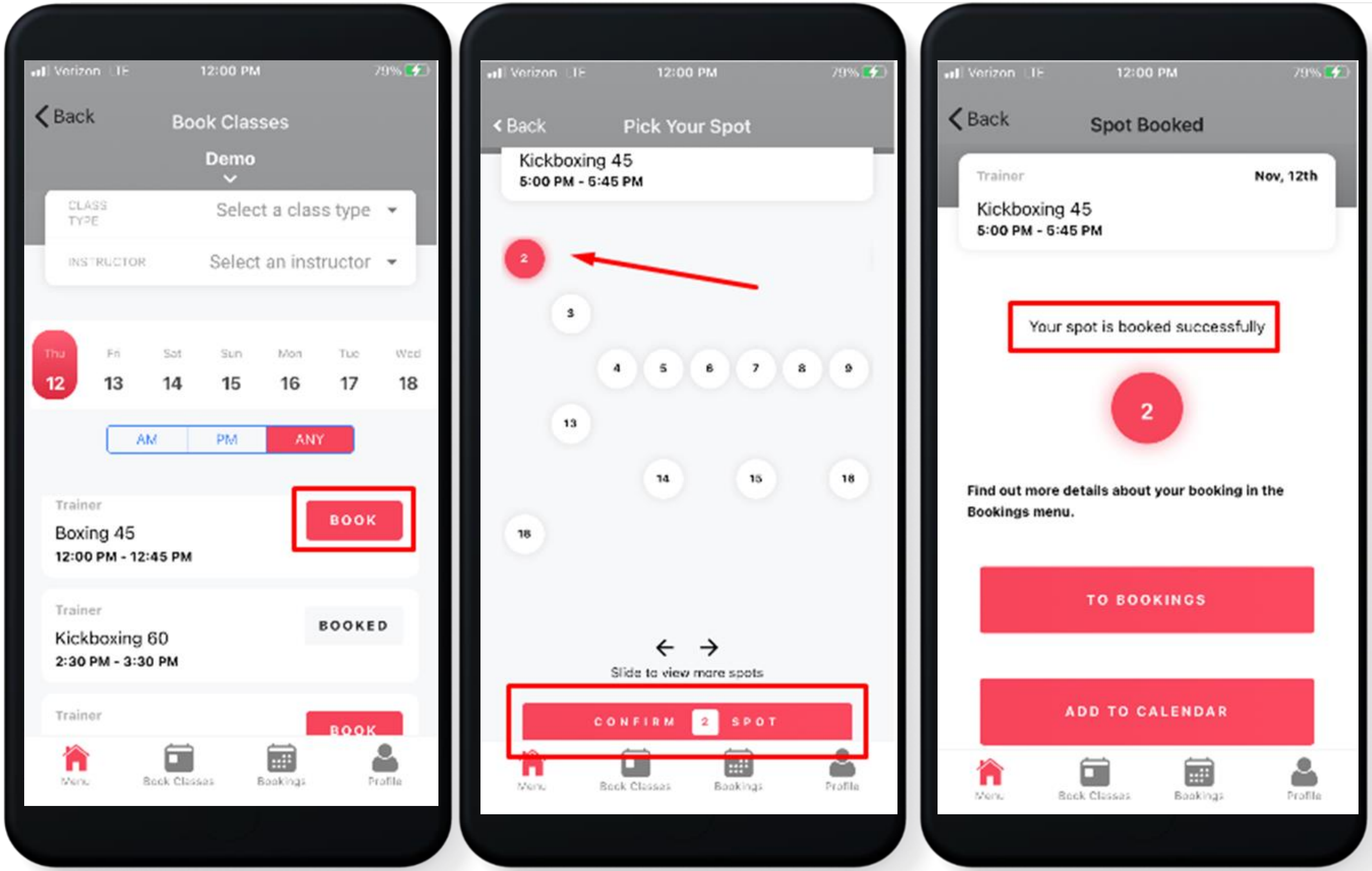


Select the preferred date and click **BOOK** next to the desired class.

Select **CONFIRM BOOKING.**

User will receive a successful booking message.

TITLE Boxing Club Member App: Spot Booking



If a room layout has been created for a class type, user can book a specific spot in the class.

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

User will be asked to choose a spot from the room layout.

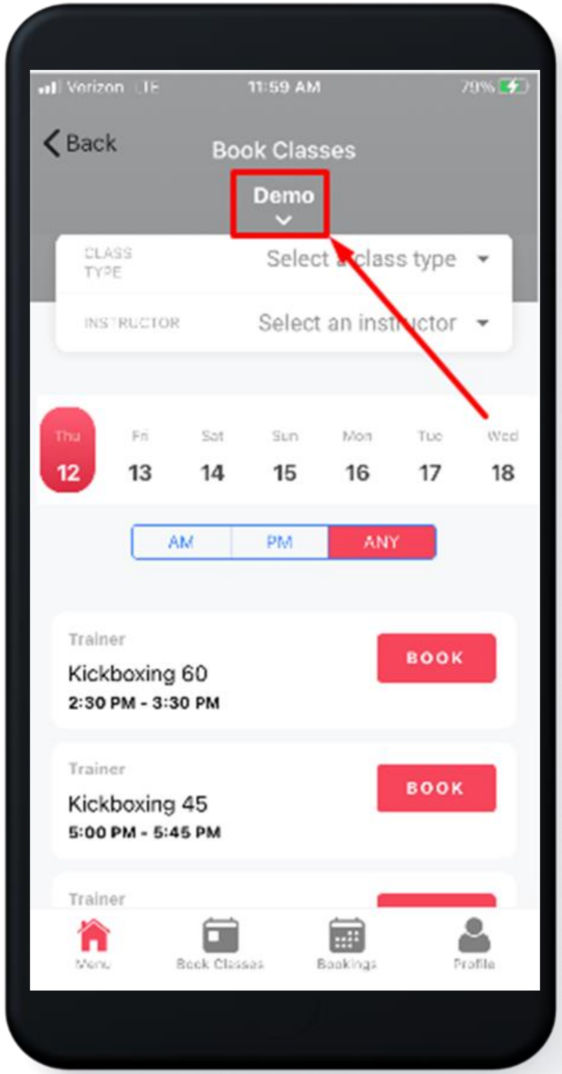
Once confirmed, the user will receive a successful message and their spot number.

Their spot number will also be listed in the bookings.

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

TITLE BOXING CLUB

TITLE Boxing Club Member App: Cross-Club Book

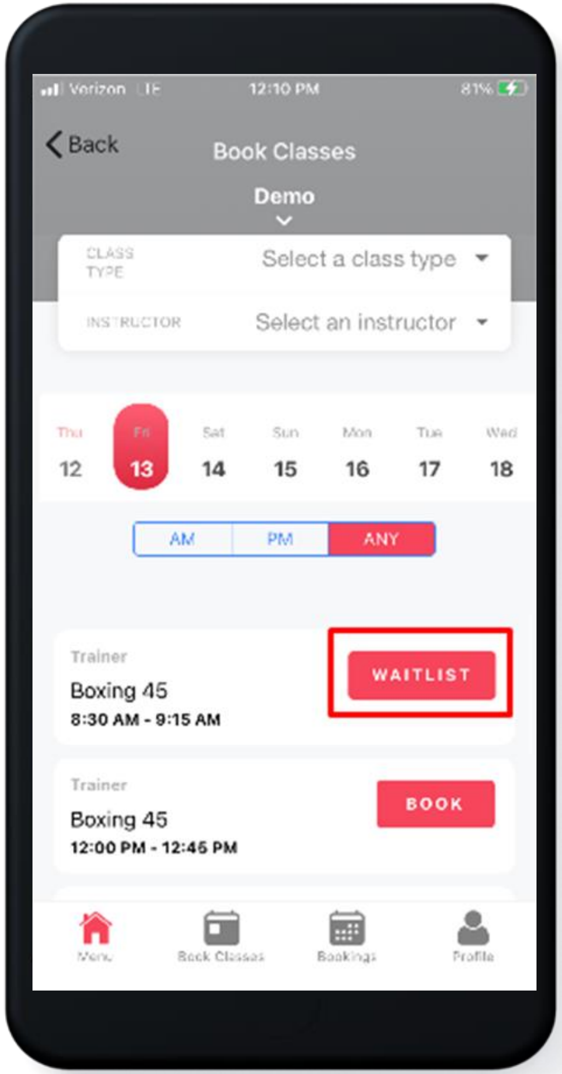


If cross-club bookings have been set up between multiple clubs, the user can navigate to the other location(s) class schedule to book a class.

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

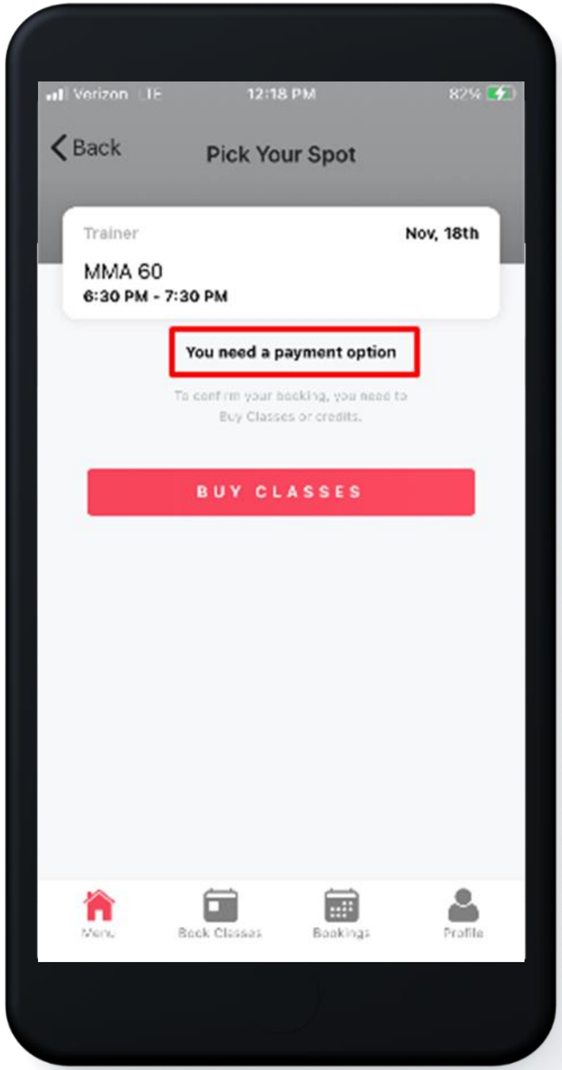
NOTE: Cross-club booking between locations will initially need to be set up at the Corporate level (if applicable). Once setup, ensure that the cross-club booking feature is enabled for the class type.

TITLE Boxing Club Member App: Join The Waitlist



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

TITLE Boxing Club Member App: Book a Class Troubleshooting



If a user cannot book into a class…

1- Confirm user is in good standing (no past dues) and/or does not have a frozen agreement.

2- Confirm user has an active membership (may need to adjust user's membership expiration date).

Edit Membership Status: https://www.clubready.com/wiki/WK23546050548

3- 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

4- 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

5- 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.

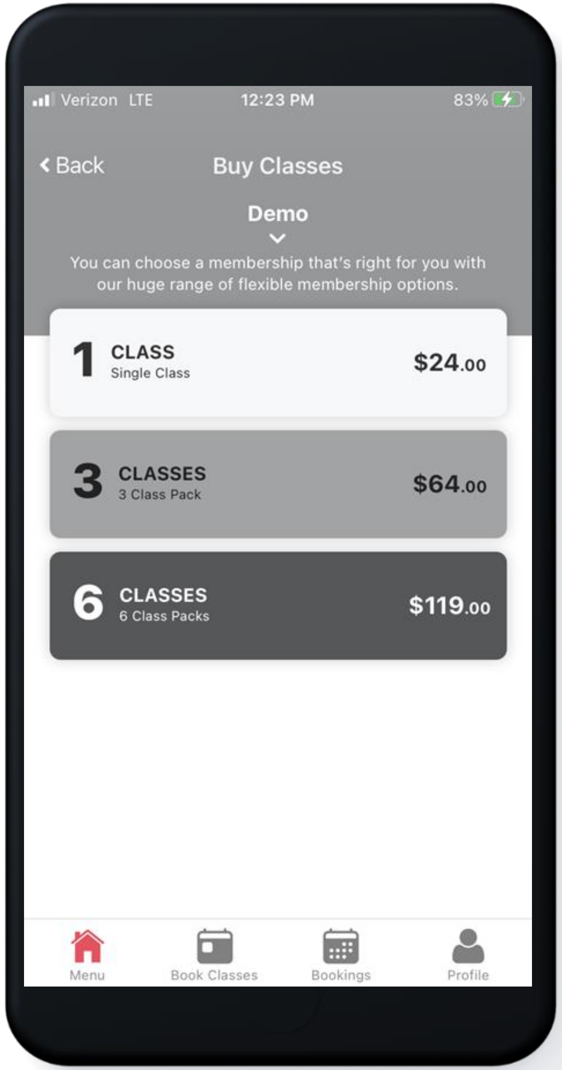
Creating a Booking Policy: https://www.clubready.com/wiki/WK2339967002

6- If booking at another location, confirm the class type has been enabled for cross club booking and the clubs have been set up for cross club bookings.

7- Confirm user is not logging into a duplicate account with the same email as their true member account.

If so, delete or merge the duplicate account and reset their password in ClubReady.

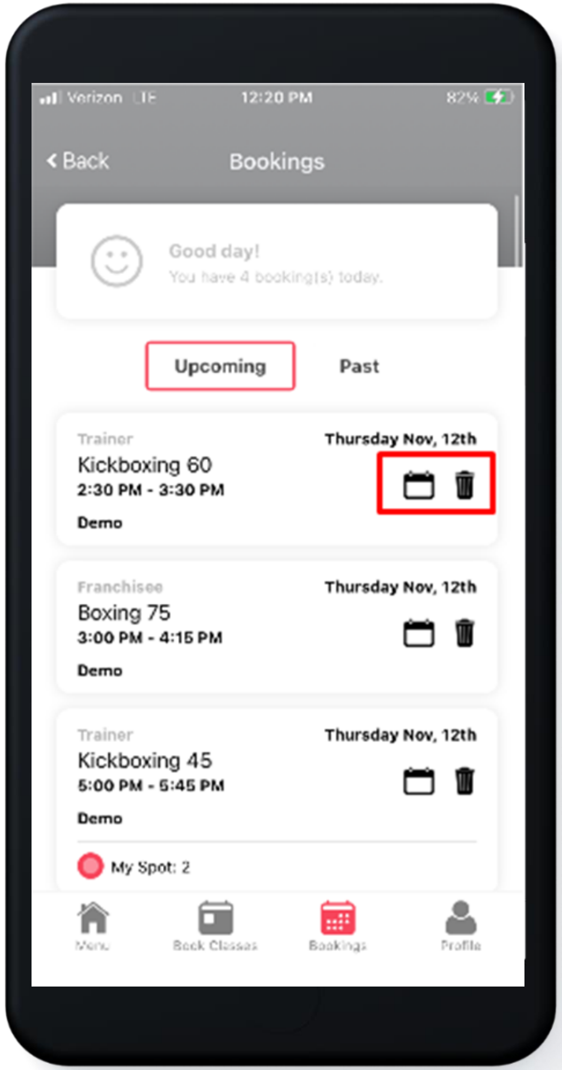
TITLE Boxing Club Member App: Buy Classes



Packages 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

TITLE Boxing Club Member App: Bookings



Shows currently enrolled classes.

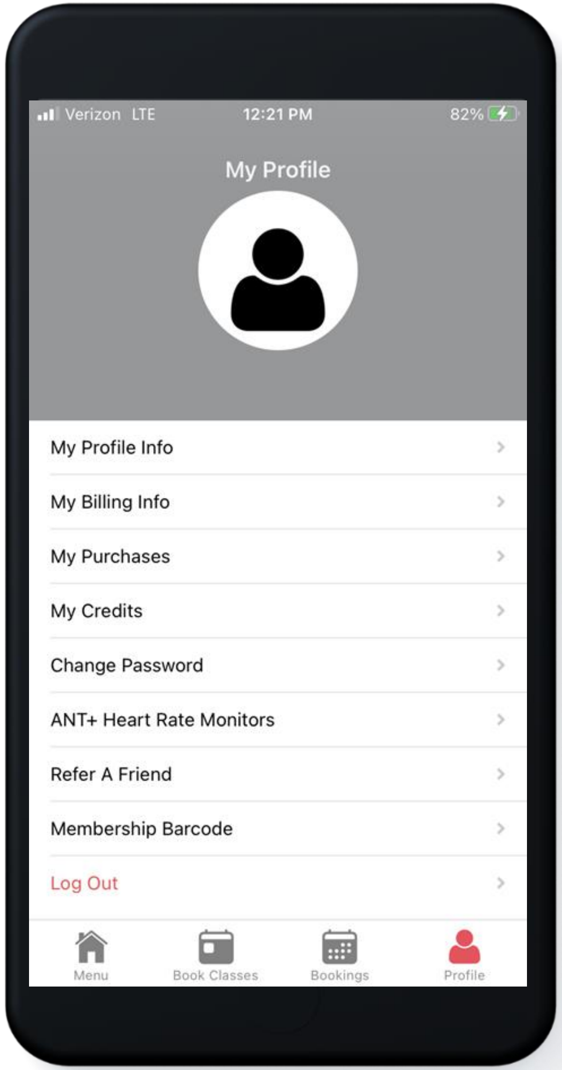
If a user booked a particular spot number, this would show under the booking.

The user can also 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).

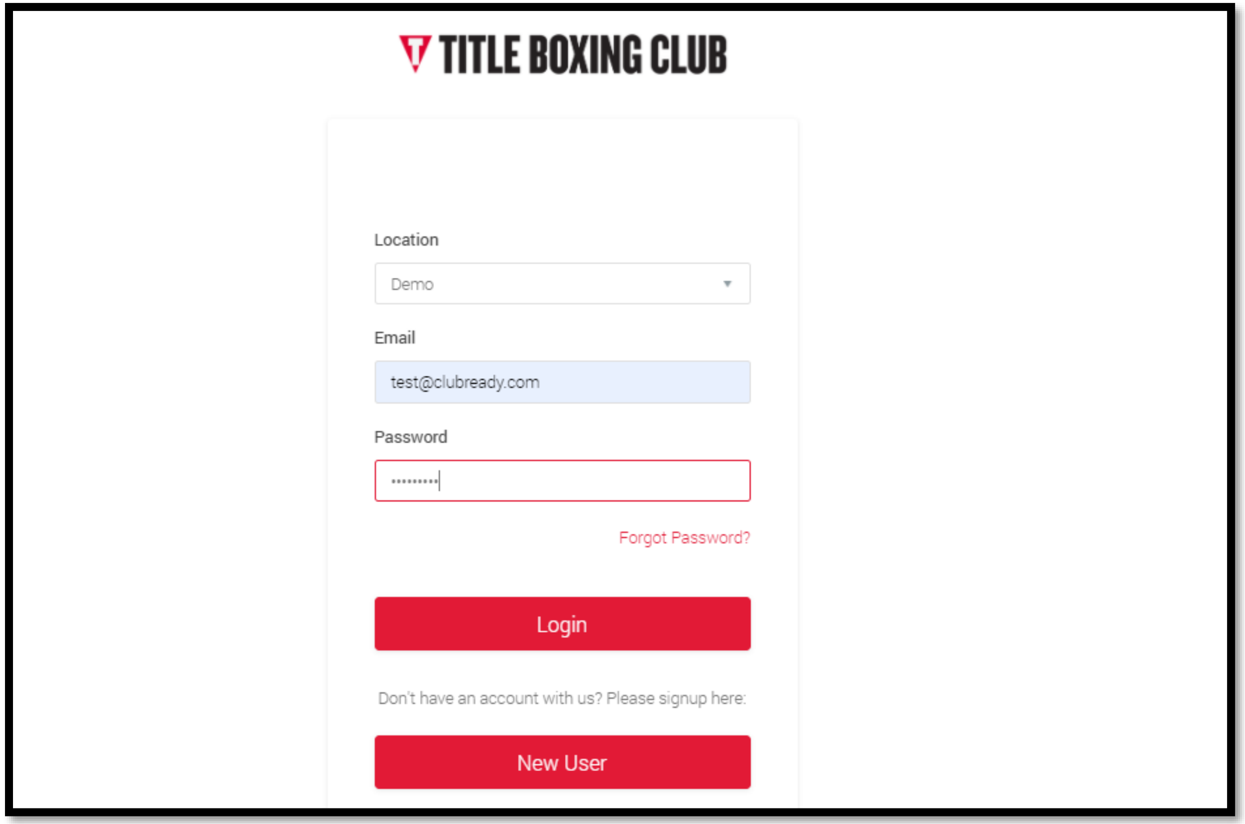
TITLE Boxing Club Member App: Profile



- My Profile Info = basic profile information
- My Billing Info = payment profile
- My Purchases = purchases made by user
- Change Password = reset password
- 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

Member Portal

TITLE Boxing Club Member Portal: Logging In



Login URL:
https://titleboxing.myperformanceiq.com/user/login

Member will select their home location.

Member will use the email on their ClubReady account and their ClubReady password.

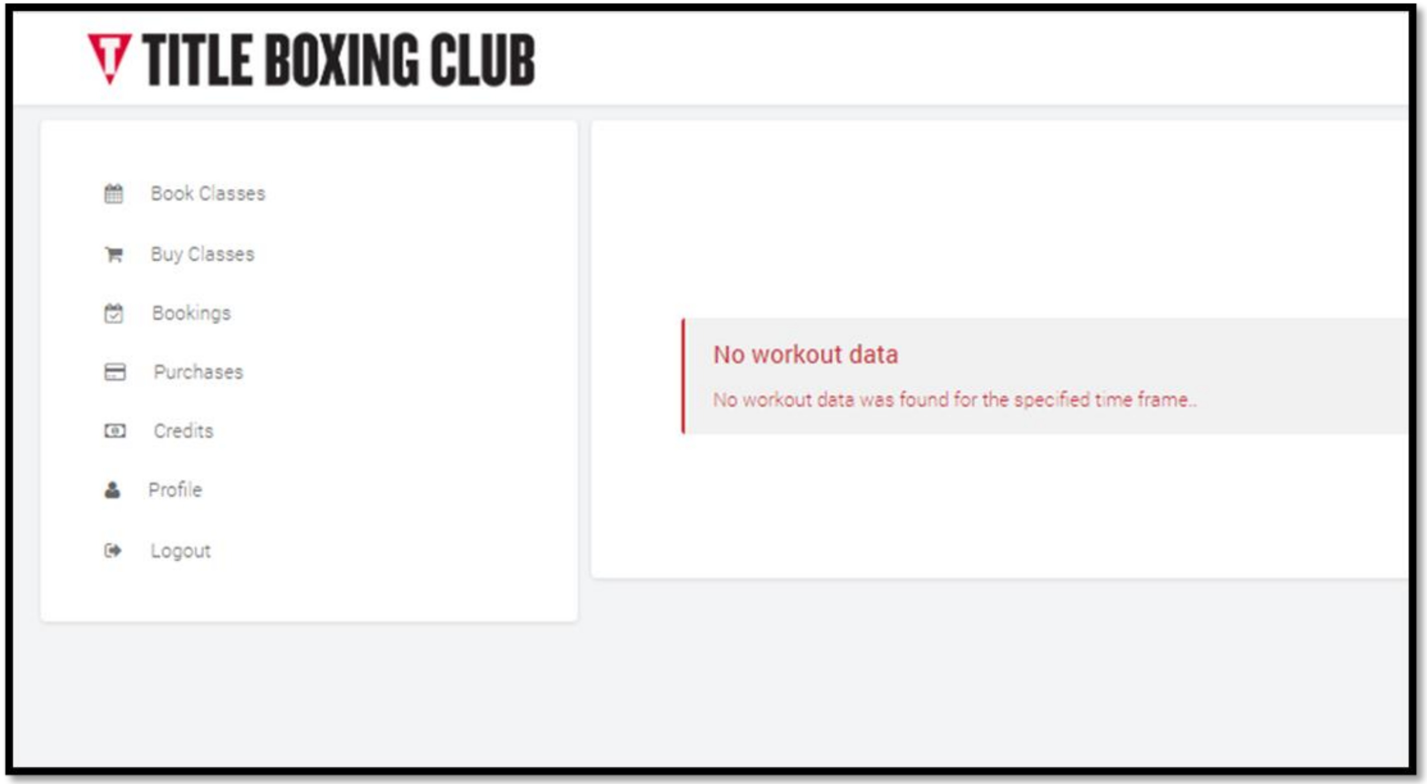
If member does not know their password, use the 'Forgot Password?' link to reset it.

Staff can also reset the member's password on their ClubReady account.

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

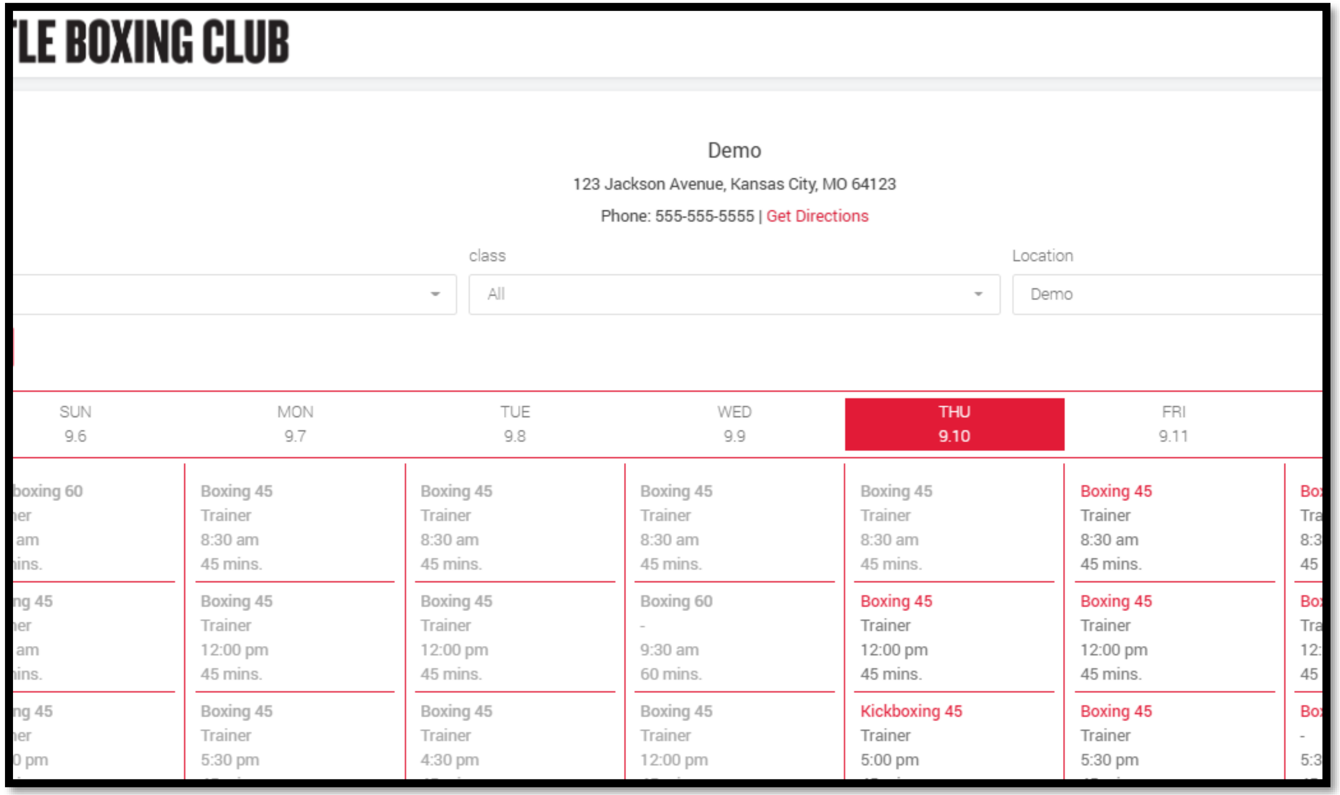
If new, the user can select the 'New User' option to create a new account.

TITLE Boxing Club Member Portal: Home Screen



- Book Classes
- Buy Classes
- Bookings
- Purchases
- Credits
- Profile

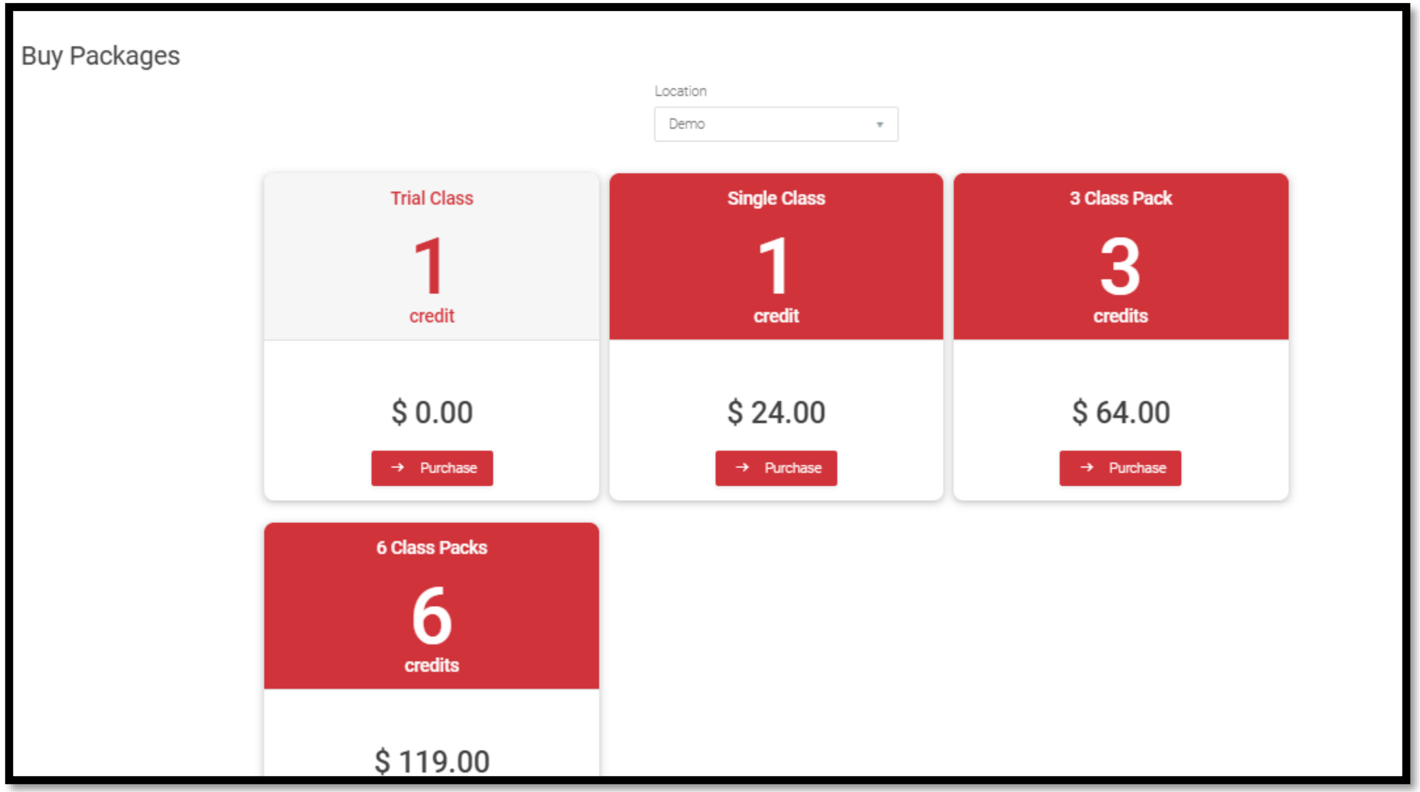
TITLE Boxing Club Member Portal: Book Classes



Book a class from the location’s schedule.

User can select another location’s class schedule here as well to cross-club book (if member has the all access membership).

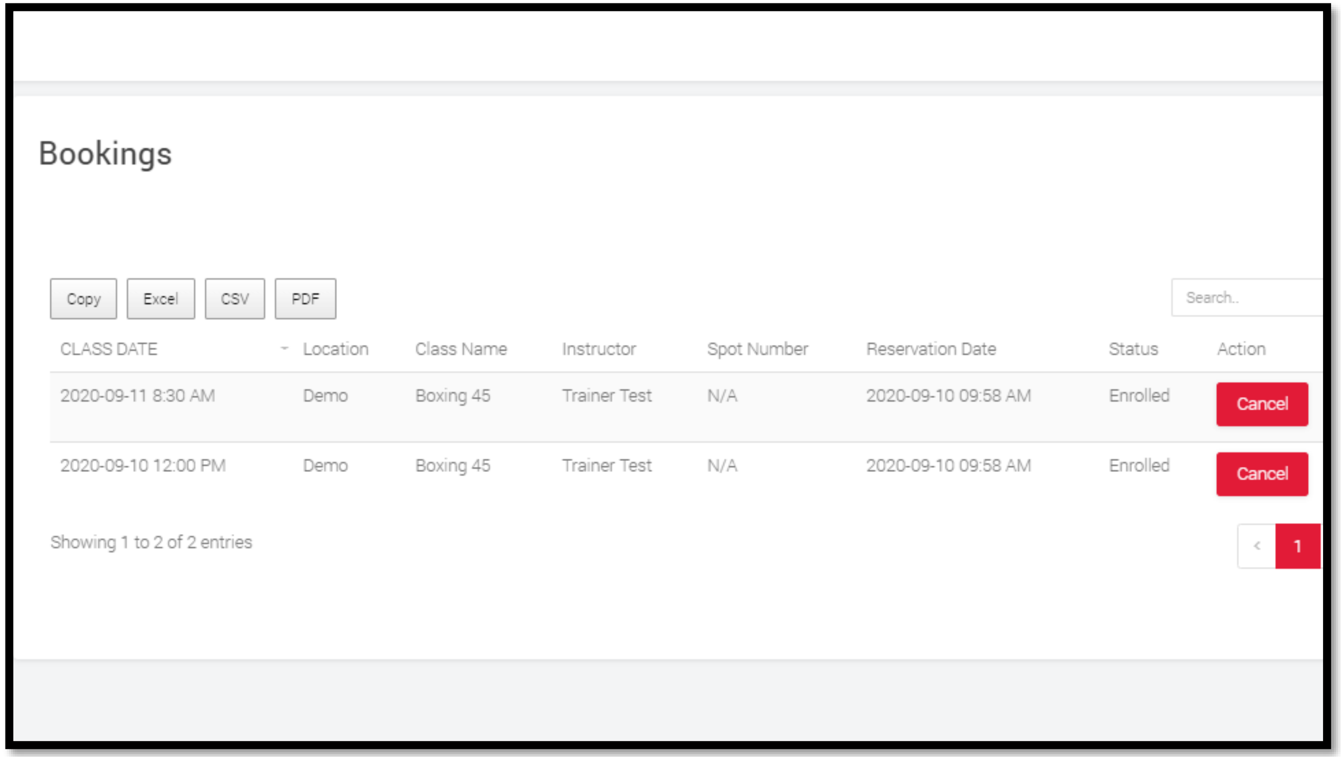
TITLE Boxing Club Member Portal: Buy Classes



Sales packages that have been enabled to be sold through the app/web portal will be available for purchase by the user.

Please refer to this knowledgebase article on setting up sales packages and enabling them for purchase: https://www.clubready.com/wiki/WK39908408736

TITLE Boxing Club Member Portal: Bookings



Bookings

Copy Excel CSV PDF

Search...

CLASS DATE	Location	Class Name	Instructor	Spot Number	Reservation Date	Status	Action
2020-09-11 8:30 AM	Demo	Boxing 45	Trainer Test	N/A	2020-09-10 09:58 AM	Enrolled	Cancel
2020-09-10 12:00 PM	Demo	Boxing 45	Trainer Test	N/A	2020-09-10 09:58 AM	Enrolled	Cancel

Showing 1 to 2 of 2 entries

‹ 1

View current and past bookings.

User can cancel a booking.

TITLE Boxing Club Member Portal: Purchases

Purchases

Copy | Excel | CSV | PDF

INVOICE NUMBER	PACKAGE NAME	AMOUNT	SALES TAX	PAYMENT DATE
158604587		$0	$0	09-10-2020
158604588		$0	$0	09-10-2020
158604589		$0	$0	09-10-2020
158604633		$0	$0	09-10-2020
158604634		$0	$0	09-10-2020
158604635		$0	$0	09-10-2020

Showing 1 to 6 of 6 entries

View past sales package purchases through the app/member portal.

TITLE Boxing Club Member Portal: Credits

Credits

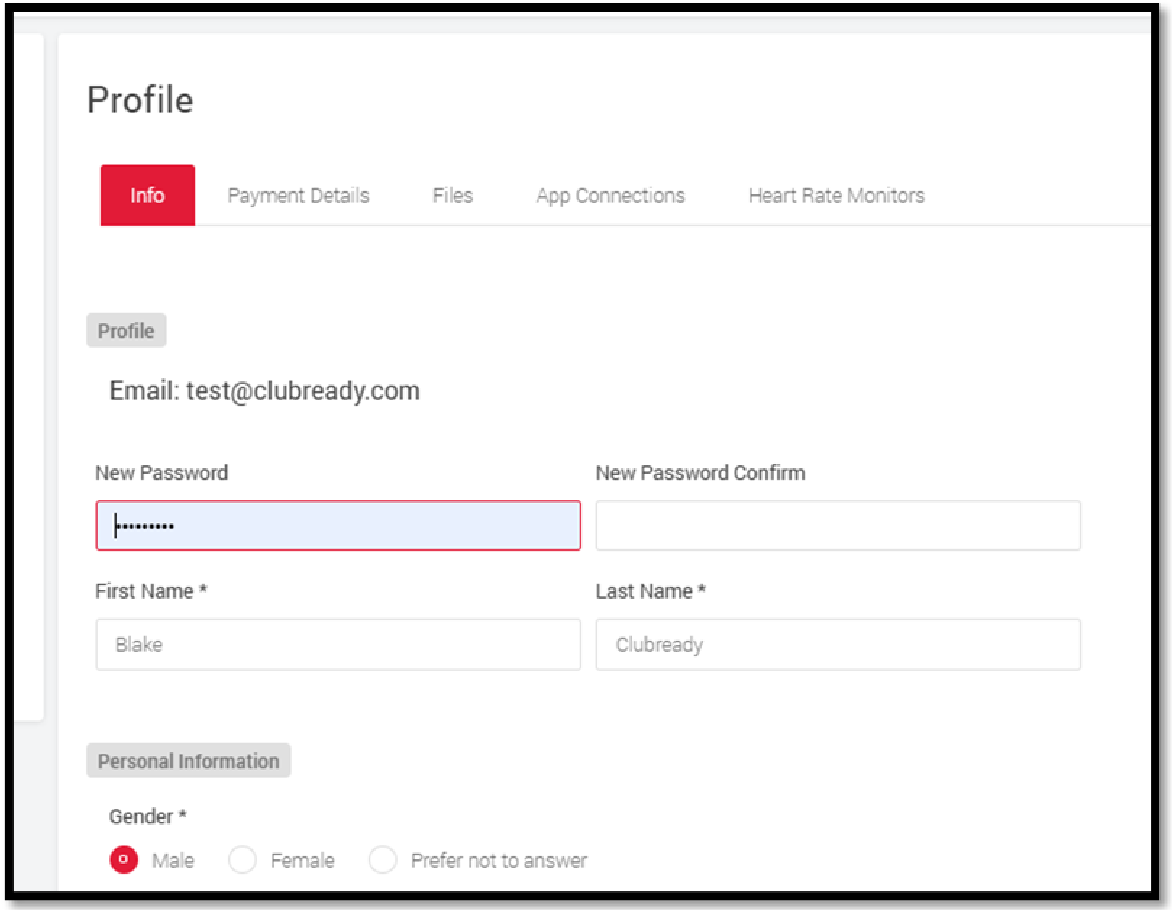
Copy Excel CSV PDF

PACKAGE NAME	COUNT	REMAINING
Boxing 30	3	2
Kickboxing 30	3	3

Showing 1 to 2 of 2 entries

View remaining credits and type of credits.

TITLE Boxing Club Member Portal: Profile



View/update contact information, payments profile, register a new heart rate monitor.

Member Task Management

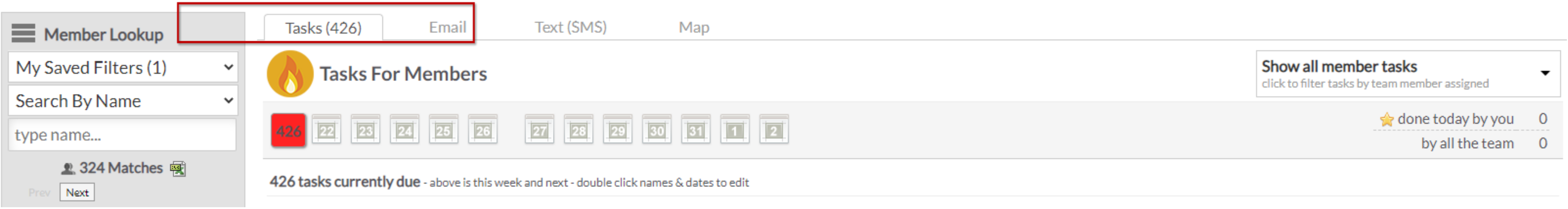
Working a Member Task (Past Due, etc..)

Members tab > Tasks

Locate all tasks assigned to you under **Members > Tasks**. The list will display the member name, the activity that needs to be completed, staff assigned to the task, due date and priority.

Click the **Work It** to work on a specific task; Activity column will notify type of contact required. Once completed, make sure to select the check box next to the Work It button.

NOTE: Similar to lead tasks, members will have task auto-populate based of specific triggers, and the activity will notify staff to that trigger and/or reason for contacting member.

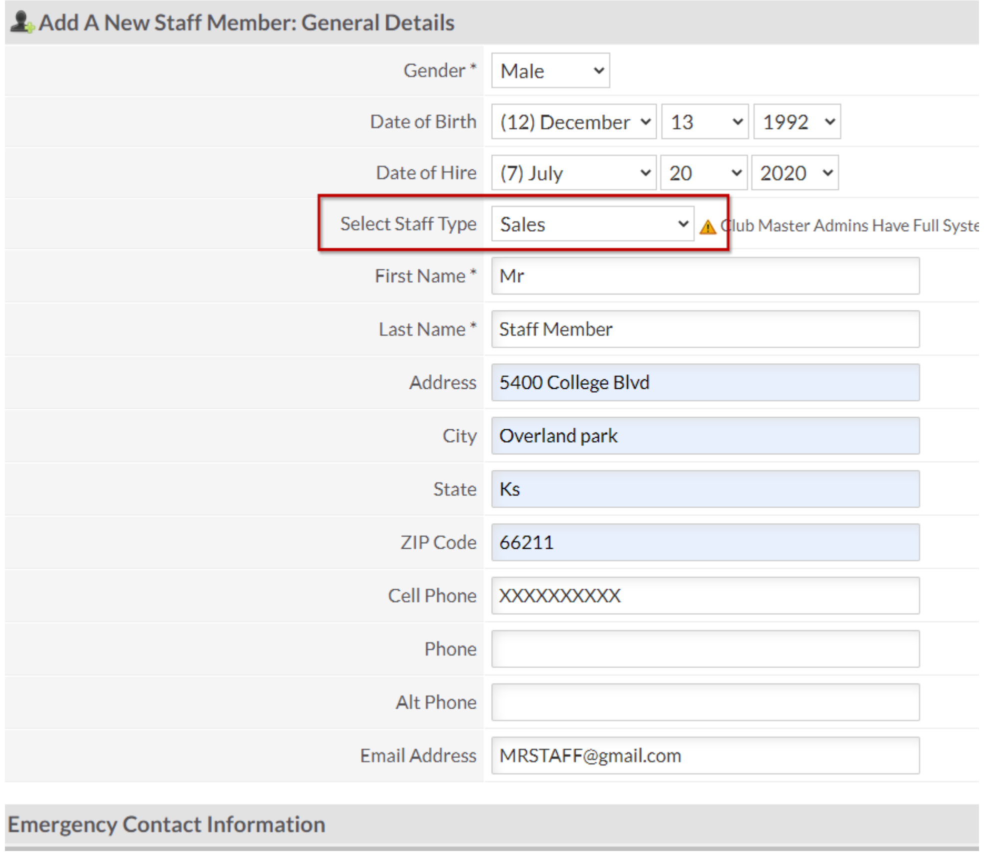


Staff Management

Add Staff

Navigate to **Staff > Add A New Staff Member >** complete staff details and login > **Add New Staff Member**

Note: The selected staff type will determine the permission level that the staff member will have access to club's site. These permission levels by staff type are preset in all systems, and cannot be adjusted.



Add A New Staff Member: General Details

Gender *	Male
Date of Birth	(12) December / 13 / 1992
Date of Hire	(7) July / 20 / 2020
Select Staff Type	Sales — Club Master Admins Have Full Syste
First Name *	Mr
Last Name *	Staff Member
Address	5400 College Blvd
City	Overland park
State	Ks
ZIP Code	66211
Cell Phone	XXXXXXXXXX
Phone	
Alt Phone	
Email Address	MRSTAFF@gmail.com

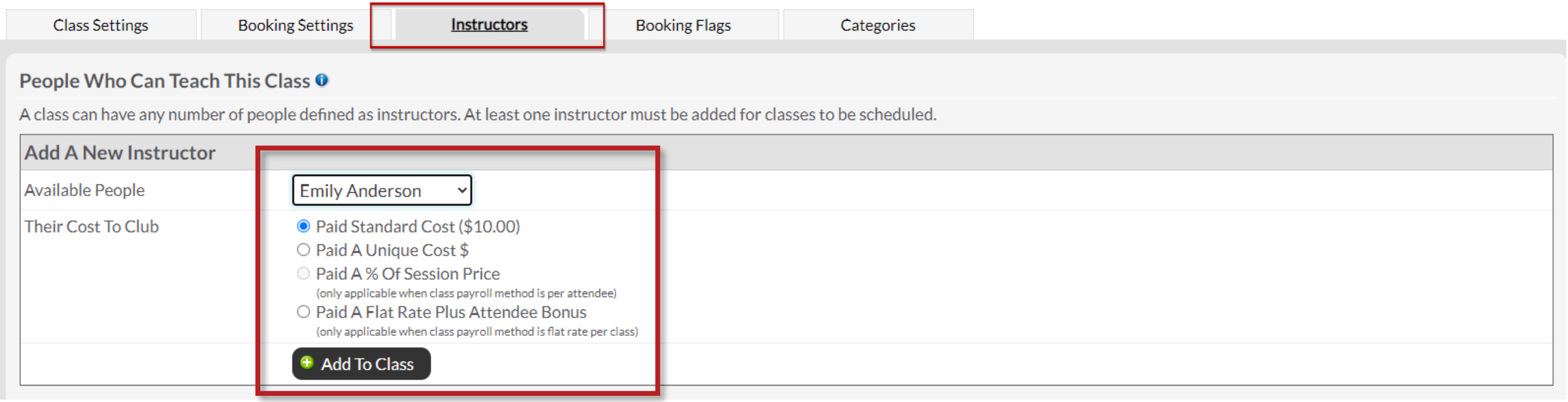
Emergency Contact Information

Add Staff to Class/Service Types

This allows a particular staff member to teach a class type

Navigate to **Setup** > **Scheduling** > **Classes / Group** > Find specific class type to add staff to and click pencil > **Instructors** tab > Complete available staff and their pay rate for class > **Add To Class**

Note: Must have trainer/staff assigned to class before scheduling them a class.

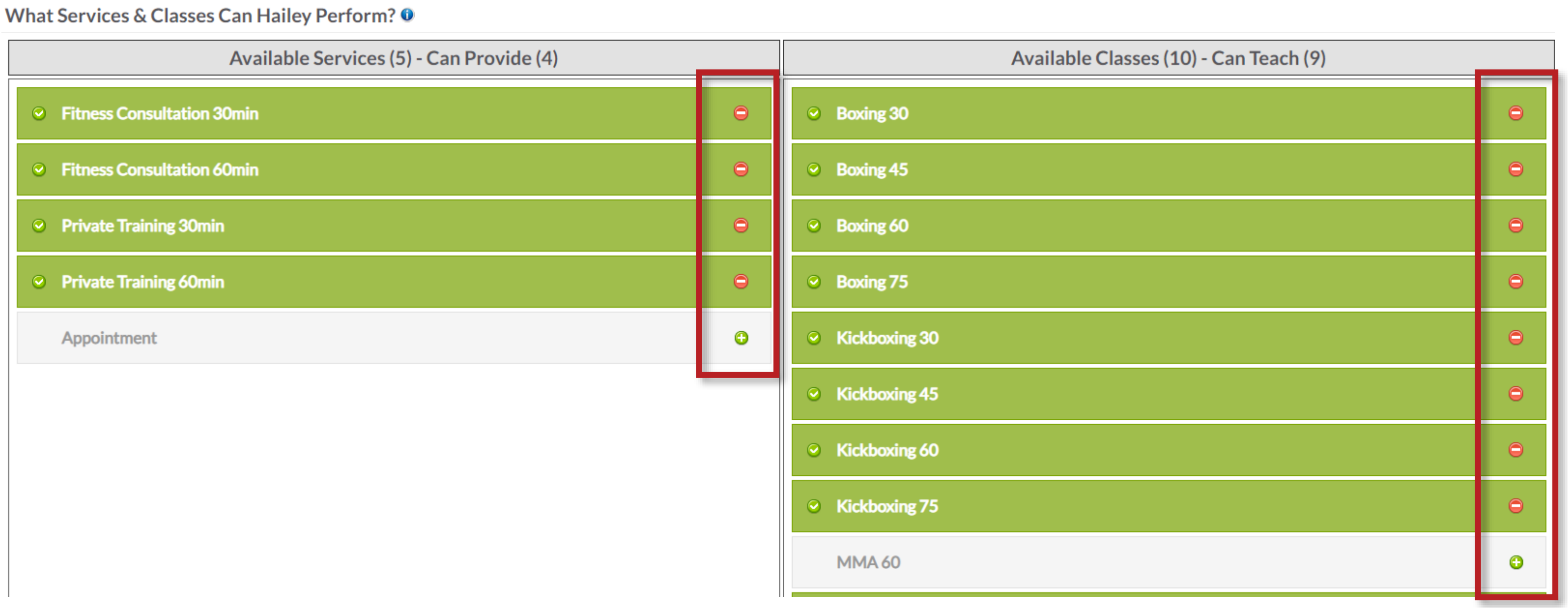


Add Staff to Class/Service Types (Option 2)

This allows a particular staff member to teach a class type

Navigate to **Staff >** Find staff member to grant access **> Go To Options** > **Scheduling Options Setup** > add or remove classes and/or services the staff member can schedule b click the “+” or “-” next to service.

Note: Must have trainer/staff assigned to class before scheduling them a class/service.

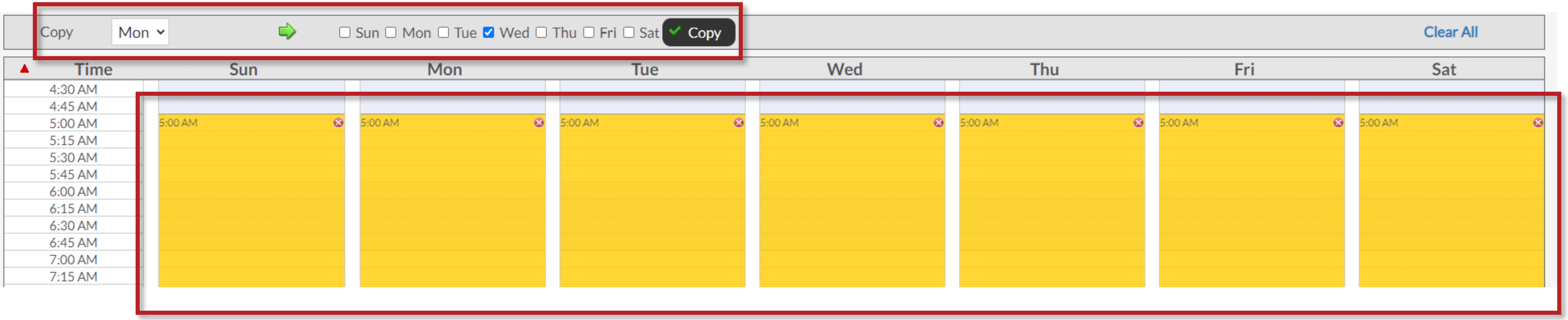


Staff Member Availability Setup

This allows a particular staff member to teach a class type

Navigate to **Staff >** Find staff member to grant access **> Go To Options** > **Weekly Availability** > add times to schedule.

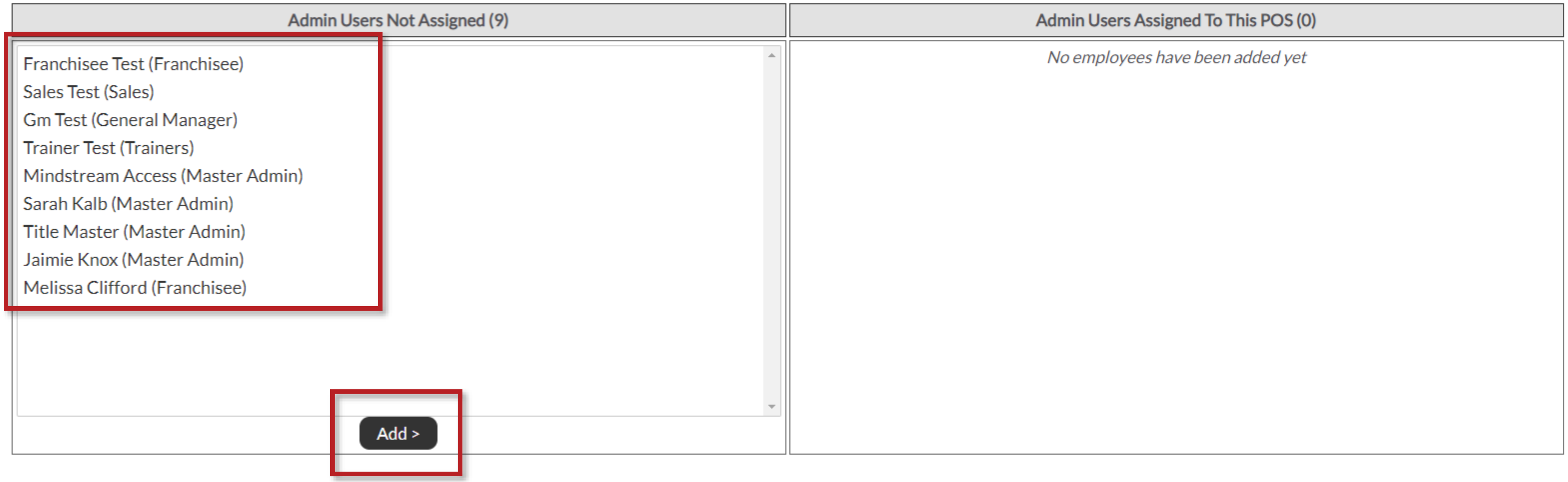
Note: For days with same availability, use the copy feature.



Add Staff to POS Access

Navigate to **Setup** > **Sales** > **POS Terminals** > Click pencil next to POS Full > **POS Users** > Click on staff to add > **Add**

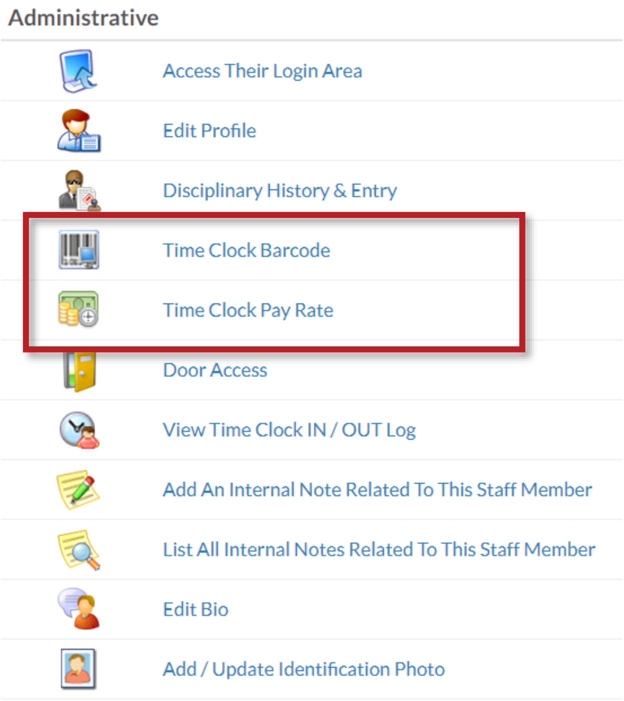
Note: This is only necessary for Full POS Terminal



Staff Member Time Clock Setup

Navigate to **Setup** > **Lookup Staff Member** > Search for staff member > **Go To Options**

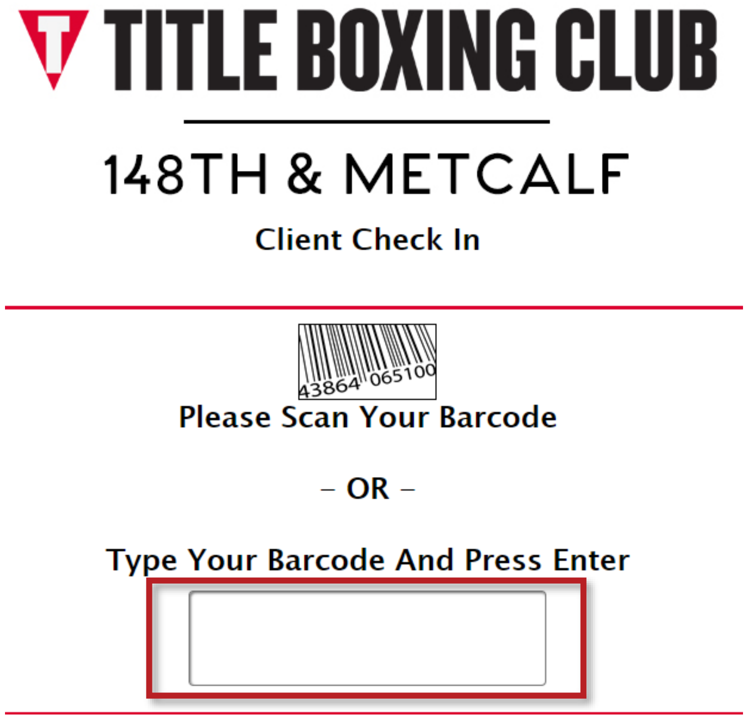
- Setup **Time Clock Barcode**
- Setup **Pay Rate**



Staff Member Clock In/Out

Team members will be able to clock-in and out using ClubReady web kiosk. Complete Time Clock Setup prior to requiring staff member clock-in.

First, you'll need to bookmark your club's Check-In Kiosk URL; this is your clubs **Site Standard Login URL** added "**/kiosk**" after ".com" (i.e. http://www.tbc148.clubready.com/kiosk). Once a the Kiosk a staff member is logged into the Kiosk, the team member will put in designated barcode; this will prompt member to verify clock-in or clock out.



Misc

Key Reports

Learn > Knowledge

Complete Guide To Intelligence & Sales Reports:

https://www.clubready.com/wiki/WK30115783534

Complete Guide To Credits / Bookings Reports:

https://www.clubready.com/wiki/WK30675265741

Complete Guide To Member Reports:

https://www.clubready.com/wiki/WK31187557746

Complete Guide To Staff Reports:

https://www.clubready.com/wiki/WK31164984962

Key Reports

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

CRUniversity

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

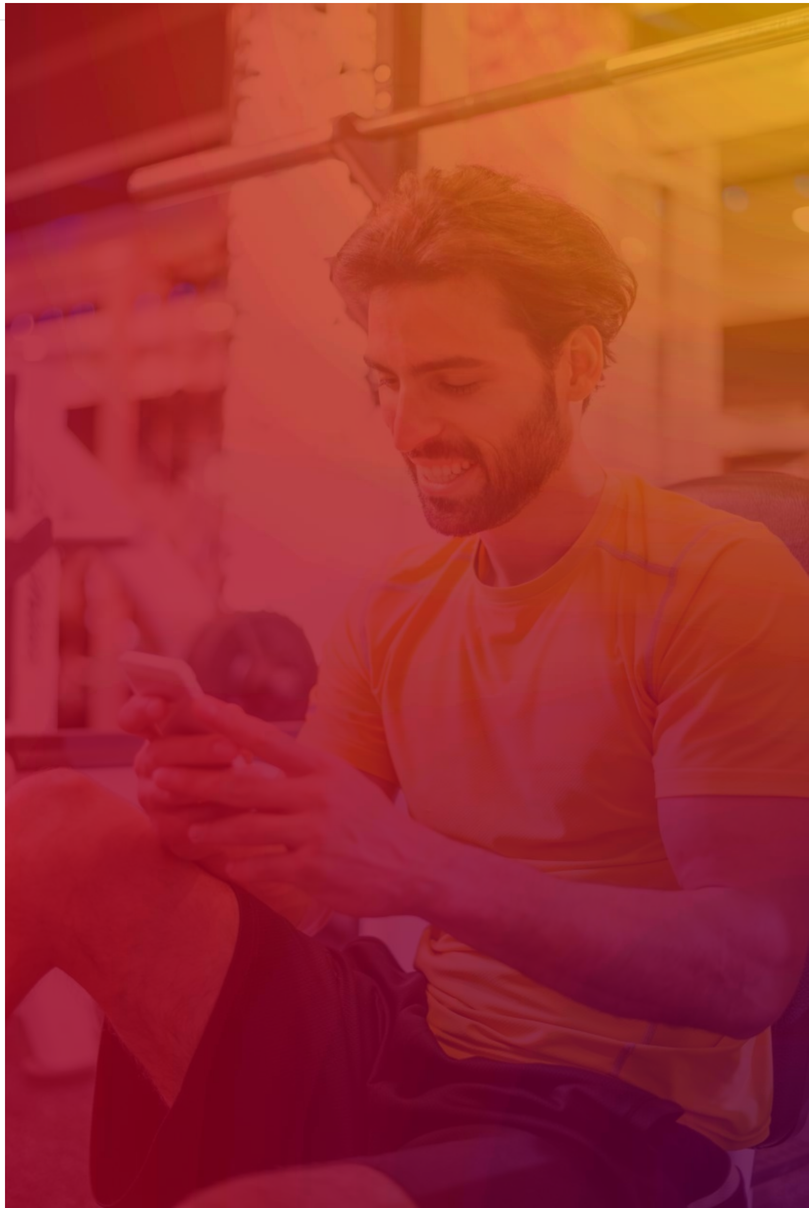
The following codes will automatically register you for the appropriate Foundations Learning Path:

- For Owners and Admins, enter the code: **TBCAdmin**
- For Staff Members, enter the code: **TBCStaff**

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

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

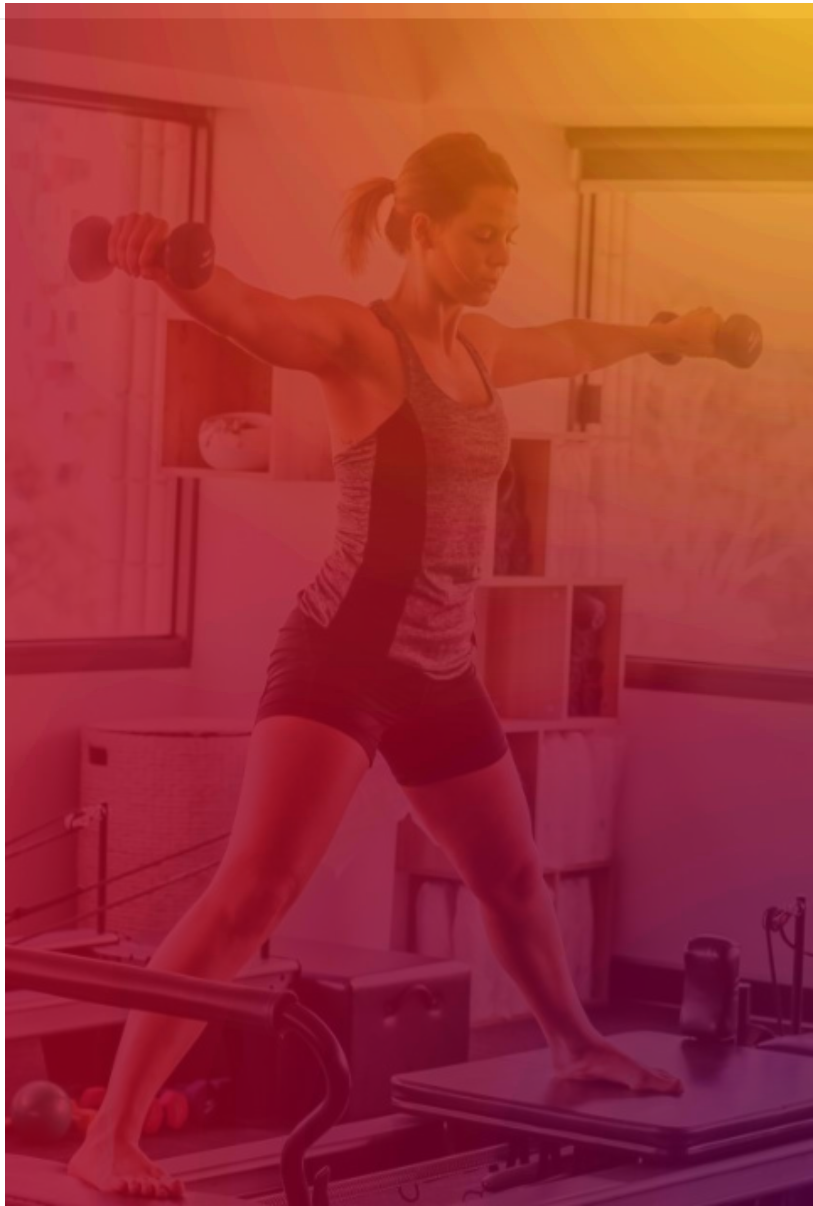
Each Learning Path is made up of several courses that train the user on using the ClubReady software. You can follow the Learning Path that has been constructed, or you can look at different courses based on your individual needs in the Course Library.



Training Home Page

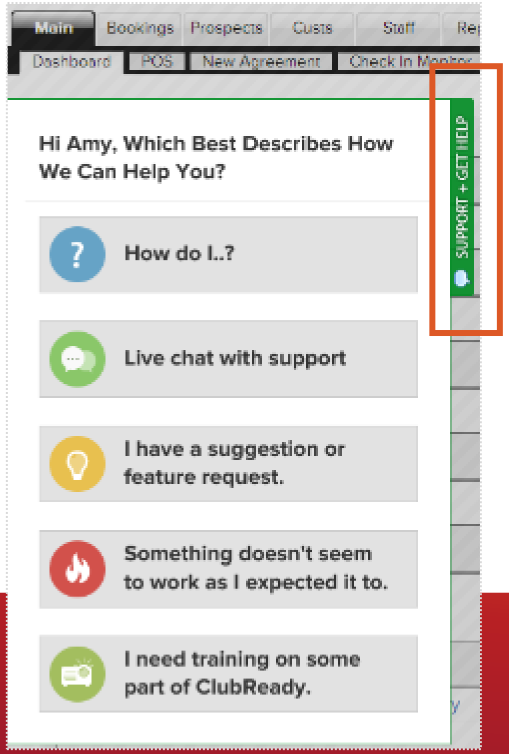
Locate all ClubReady resources in our customized Training Page from CRUniversity, User Guide, and On Demand Videos in a "one-stop" shop:

https://www.clubready.club/title-boxing-club-training



Support + Get Help

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

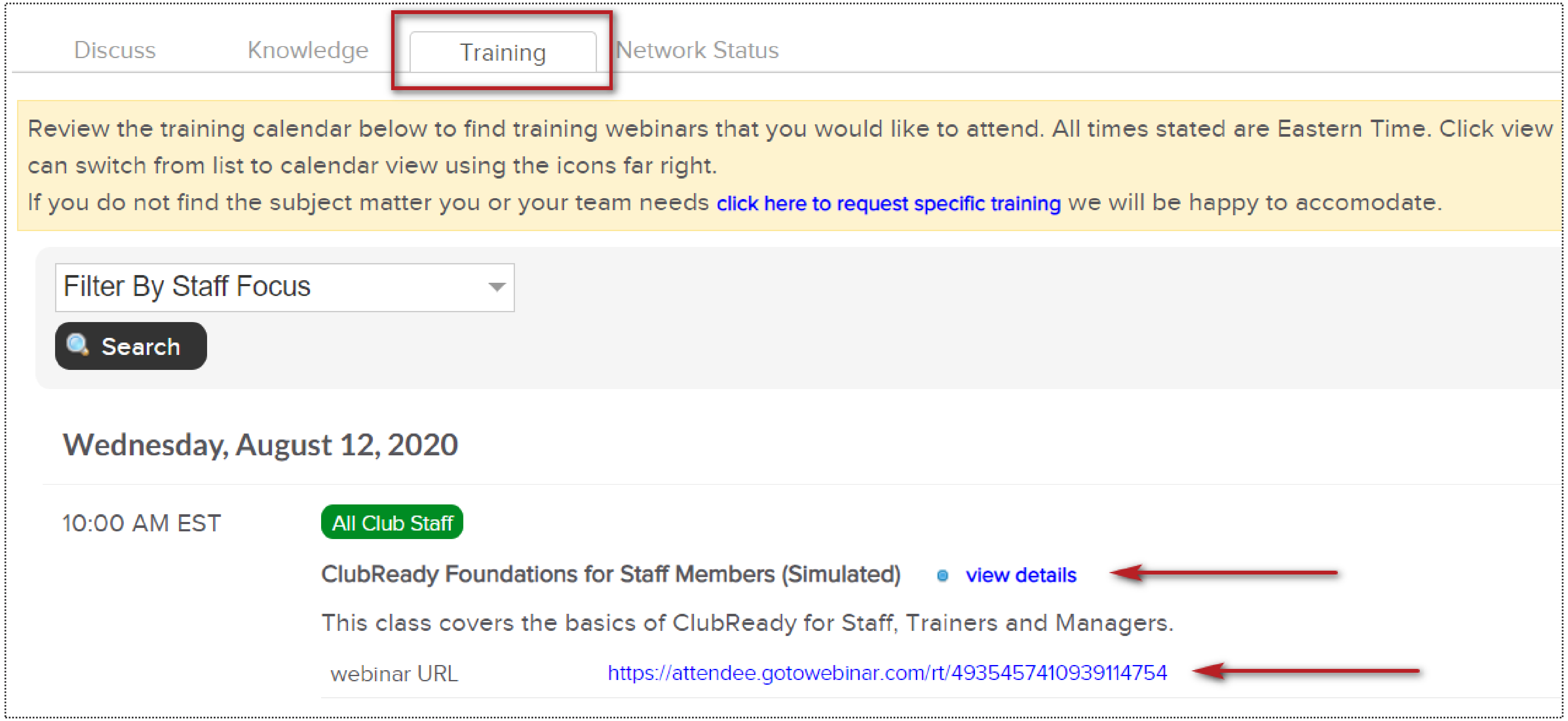


Live chat shows as an option in the support slide out and allows you to chat directly with the support team. Chats can also be converted into help desk support tickets if a resolution is not available during the chat session.

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

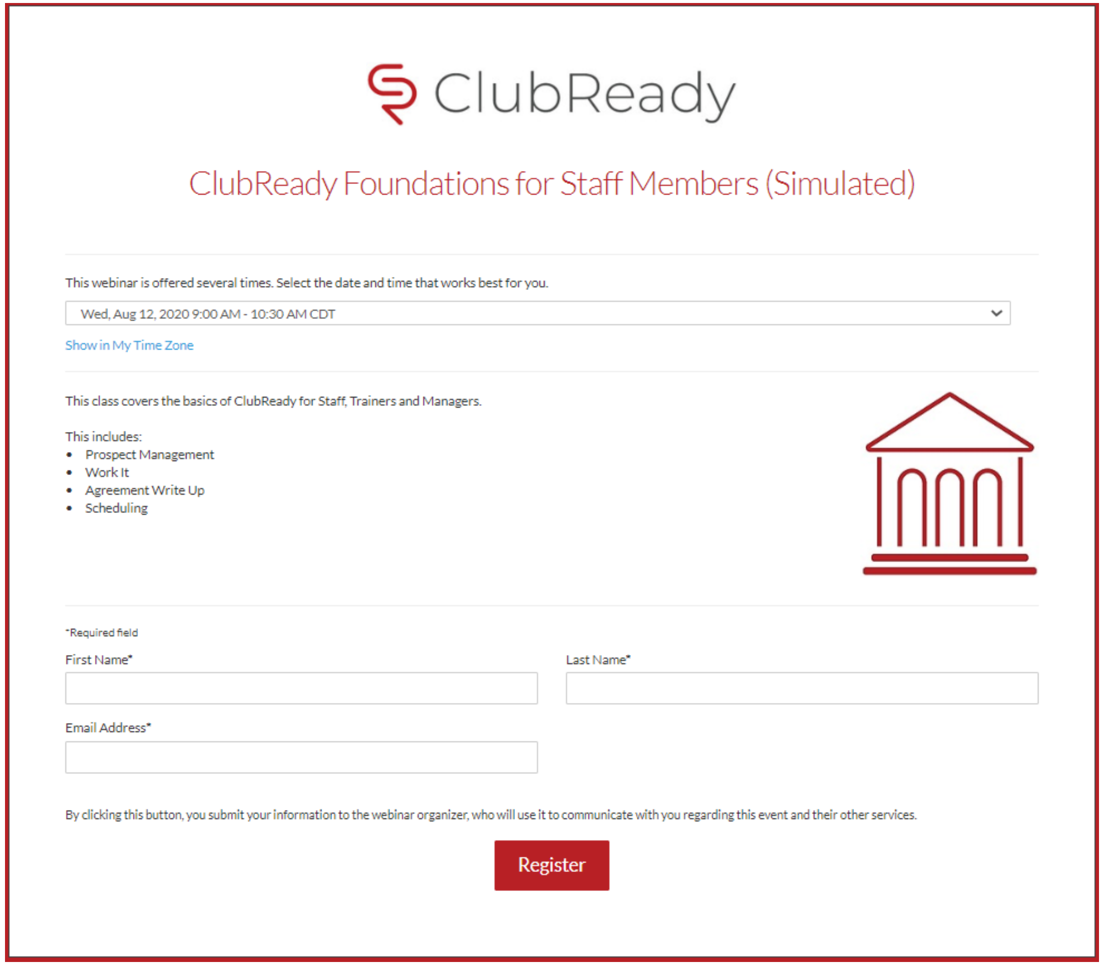
Training: ClubReady Foundations Webinar

Learn > Training



Training: ClubReady Foundations Webinar

Learn > Training



ClubReady

ClubReady Foundations for Staff Members (Simulated)

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

Wed, Aug 12, 2020 9:00 AM - 10:30 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: Recorded Training Sessions

You can play these recorded sessions at your convenience for extra learning anytime! To locate additional recorded training sessions, go to **Learn > Knowledge >** and enter the word **webinar** in your search. This will populate any of our pre-recorded sessions.

Video - Communications: https://www.clubready.com/wiki/WK26995751820

Video - Managing An Agreement: https://www.clubready.com/wiki/WK31035704214

Video - Reports: Intelligence, Sales And Misc Reports: https://www.clubready.com/wiki/WK31016141186

Video - Employee Time Clock: https://www.clubready.com/wiki/WK31458733558

Video - Managing Tasks And Using Work It Recorded Webinar: https://www.clubready.com/wiki/WK27972088386

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For updates on enhancements and ClubReady news follow @ClubReady

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

Need Help? Here's How to Get It

Submit a ticket

Post on the Help Forums

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

Use Live Chat

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

ClubReady