



ClubReady Foundations User Guide

TITLE Boxing Club Demo Site

www.clubready.com/cl/titleboxingclub.asp

Username: Franchisee-test

Password: Boxing.1

Table of Contents

Hardware			
Hardware: Required	5		
Hardware: Optional & Removal	6		
Lead Management			
Working a Task	8		
Work It: Phone Calls	9		
Work It: Emails	10		
Work It: SMS (Text Message)	11		
Widget: Unread Incoming SMS	12		
Work It: Person to Person	13		
Work It: Sales Scripts	14		
Work It: Fast Book – Book a Class	15-16		
Lead Management Dashboard: Tasks	17		
Lead Management Dashboard: Leads	18		
Lead Management Dashboard: Activity	19		
Lead Management Dashboard: Guest Log	20		
Entering a Prospect	21		
Manually Edit Lead Type	22		
Issue Trial Membership: POS	23		
Issue Trial Membership: New Deal	24		
Writing an Agreement			
Writing an Agreement	26-34		
Apply a Package Discount	29-30		
Taking Signatures	32-34		
Member Payment Management			
Refund an Invoice	36		
Adding an New Invoice (Cancel Fee, etc..)	37		
Freeze an Agreement	38		
Cancel an Agreement	39		
Add/Update Credit Card On File	40		
Member Profile			
Update Member's Profile	42		
Add a Photo	43		
Member Notes	44		
Add a Member Alert	45		
Email Login & Reset Password	46		
View Check-in History	47		
Update Member's Check-in Code	48		
Point of Sale (POS)			
Point of Sale Setup	50		
Point of Sale	51		
POS: Selecting a Product	52		
POS: Editing and Checking Out	53		
POS: Applying a Promo Code for a Product	54		
POS: Finalizing the Purchase	55-56		
POS: Adding Credit on Account	57		
Report: Declined Charges	58		
Inventory			
Report: Bulk Upload Inventory	60-62		
Schedule Management			
Initial Class Details Setup (class size, etc..)	64		
Grid View: Schedule a Service	65		
Grid View: Cancel a Booking	66		
Grid View: Manually Log a Session	67		
Add A Class to the Schedule	68-69		
Schedule a Class Booking	70		
Classes: Manually Log a Session	71		

Table of Contents

First Time Visitor

Consult Benefits & Requirements	73
Execution	74
Adding Prospect to First Visitor Consult	76
Reporting	77

PerformanceIQ Admin Panel

Admin Panel: What Is It?	83
Admin Panel: Logging In	84
Admin Panel: Locations	85
Admin Panel: Reservations	86
Admin Panel: Class Types	87
Admin Panel: Users	88
Admin Panel: Class Packages	89
Admin Panel: Instructors	90
Admin Panel: Room Layout	91

Check-in Management

Check In Kiosk: Logging In	93
Check In Kiosk: Enter URL	94
Check In Kiosk: Class List	95
Check In Kiosk: Checking In	96
Check In Kiosk: New Booking	97

Member App

Member App: Download	99
Member App: Logging In	100
Member App: Login Troubleshooting	101
Member App: New User Sign Up	102
Member App: Menu Screen	103
Member App: Book A Class	104
Member App: Spot Booking	105
Member App: Cross-Club Book	106
Member App: Join The Waitlist	107
Member App: Book A Class Troubleshooting	108

Member App: Buy Classes	109
Member App: Bookings	110
Member App: Profile	111

Member Portal

Member Portal Logging In	113
Member Portal: Home Screen	114
Member Portal: Book Classes	115
Member Portal: Buy Classes	116
Member Portal: Bookings	117
Member Portal: Purchases	118
Member Portal: Credits	119
Member Portal: Profile	120

Member Task Management

Working Member Task (Past Due, etc..)	122
---------------------------------------	-----

Staff Management

Add Staff	124
Add Staff to Class/Service Types	125
Add Staff to Class/Service Types (Option 2)	126
Staff Member Availability Setup	127
Add Staff to POS Access	128
Staff Member Time Clock Setup	129
Staff Member Clock In/Out	130

Misc.

Key Reports	132
CRUniversity	134
Support + Get Help	136
Training: ClubReady Foundations Webinar	137
Training: Recorded Training Sessions	139
Stay Connected With ClubReady	140

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

Credit Card Reader:

Manufacturer: Magtek, Inc.

Model Name: CENTURION

Part Number: mag-21073145

Security Level: 2

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)*

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

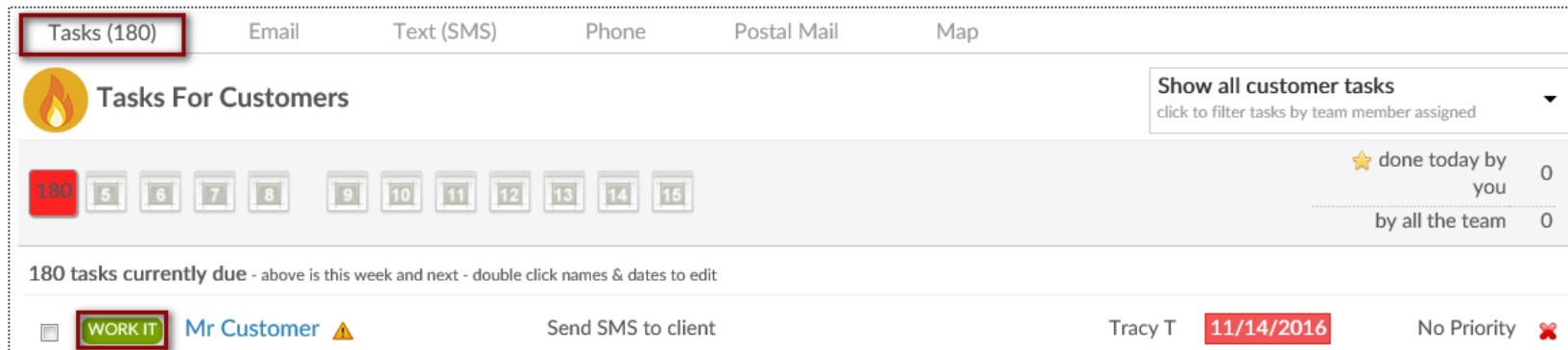
Working a Task (Follow Up, Next Action)

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.



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

 Mister Customer

PT Training Prospect

[more options for Mister](#)

ContactSales ScriptsFast BookAutomation

Make A Phone Call

Send An Email

Send An SMS

Person to Person

+ add task

TASK: call (314) 314-3141 (cell) Due 20 Days Ago

Cell number(314) 314-3141

Home numberUnknown

Work numberUnknown

Select The Outcome Of The Call

enter details of call..

Membership Sales

Do not add a new call task

☐ go to next task

Log The Phone Call

Past Calls (5)Key NoteAll Notes (124)Lead Type History

Last Call04/19/19 1:56 PM by Atena Martin

Last Talked With04/19/19 1:56 PM by Atena Martin

Calls Last 30 Days2 times

☐ hide any with no phone conversation

Atena Martin @ 04/19/19 1:56 PM

talked - positive conversation

Customer called wanting to book a private session.

Charlie Clubowner @ 04/09/19 12:11 PM


phone rang but no pickup

Nobody was home, left a message.

Charlie Clubowner @ 11/02/18 1:25 PM

talked - positive conversation

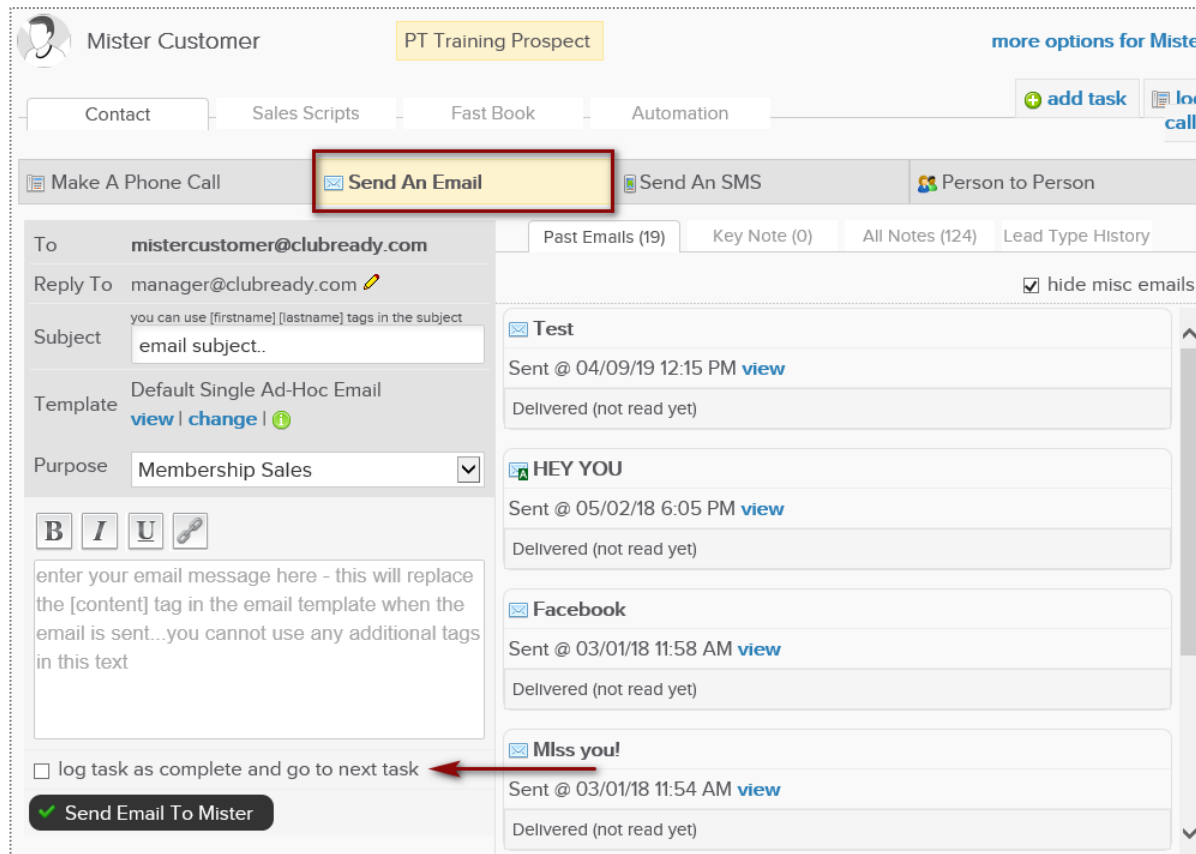
Customer called and they wanted to book a club tour to check out the new updated club.

 TITLE BOXING CLUB

9

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.



The screenshot shows the 'Send An Email' interface for a client named 'Mister Customer' (PT Training Prospect). The interface is divided into two main sections: a form on the left for composing an email and a history of past emails on the right.

Form Section (Left):

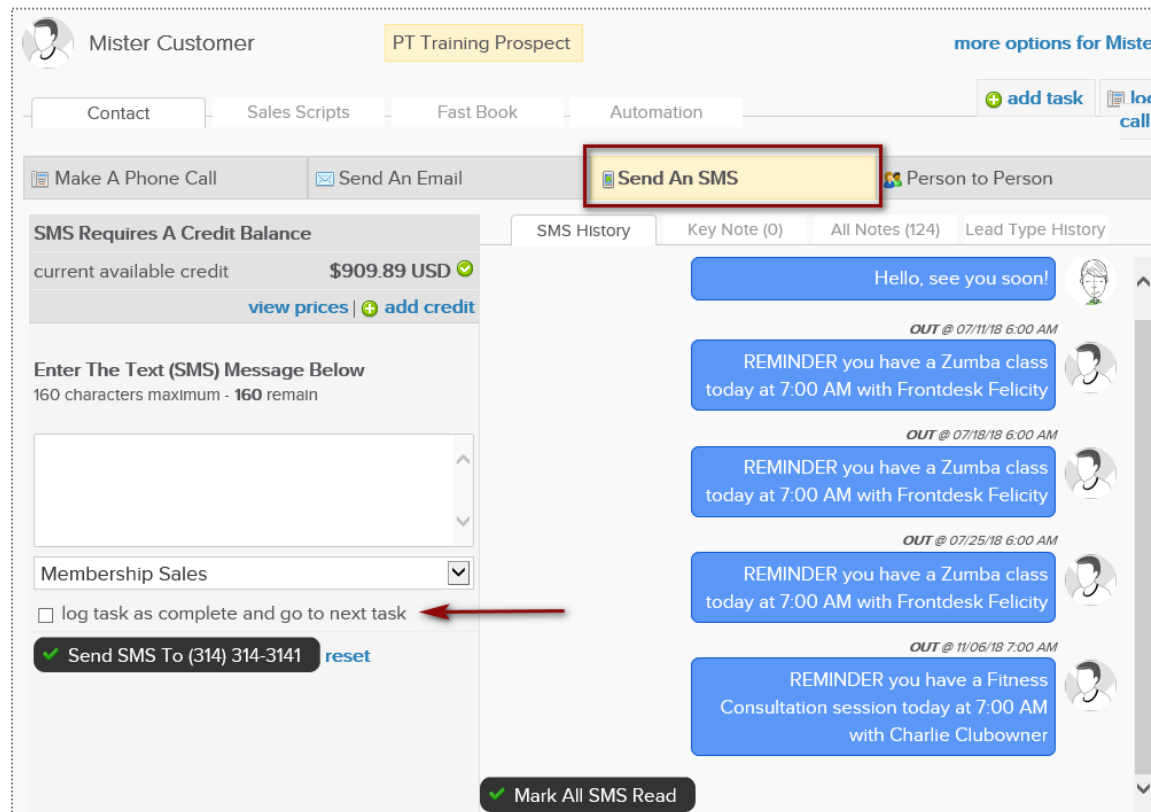
- To:** mistercustomer@clubready.com
- Reply To:** manager@clubready.com
- Subject:** you can use [firstname] [lastname] tags in the subject email subject..
- Template:** Default Single Ad-Hoc Email (view | change | i)
- Purpose:** Membership Sales
- Rich Text Editor:** Includes bold (B), italic (I), underline (U), and link icons. The text area contains a placeholder: "enter your email message here - this will replace the [content] tag in the email template when the email is sent...you cannot use any additional tags in this text".
- Checkboxes:** ☐ log task as complete and go to next task
- Buttons:**

History Section (Right):

- Buttons:** Past Emails (19), Key Note (0), All Notes (124), Lead Type History
- Filter:** ☒ hide misc emails
- Email History:**
 - Test**
Sent @ 04/09/19 12:15 PM [view](#)
Delivered (not read yet)
 - HEY YOU**
Sent @ 05/02/18 6:05 PM [view](#)
Delivered (not read yet)
 - Facebook**
Sent @ 03/01/18 11:58 AM [view](#)
Delivered (not read yet)
 - Miss you!**
Sent @ 03/01/18 11:54 AM [view](#)
Delivered (not read yet)

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.



The screenshot displays the ClubReady 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 sidebar with tabs for "Contact", "Sales Scripts", "Fast Book", and "Automation". The main content area shows the "Send An SMS" tab with a "SMS Requires A Credit Balance" section indicating a current available credit of \$909.89 USD. Below this is a text input field for the message, a dropdown menu for "Membership Sales", and a checkbox for "log task as complete and go to next task". A red arrow points to this checkbox. The "Send SMS To (314) 314-3141" button is visible, along with a "reset" link. The right side of the interface shows a list of sent SMS messages, including a "Hello, see you soon!" message and several "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.

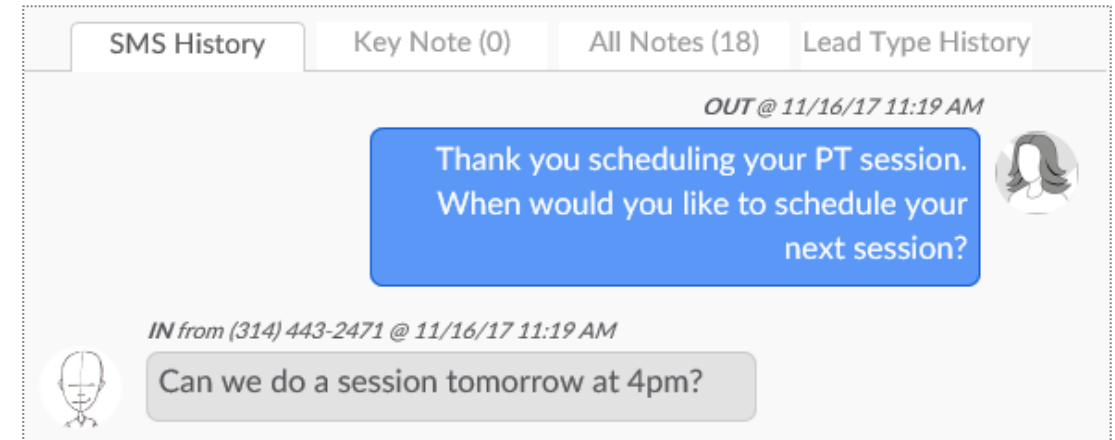
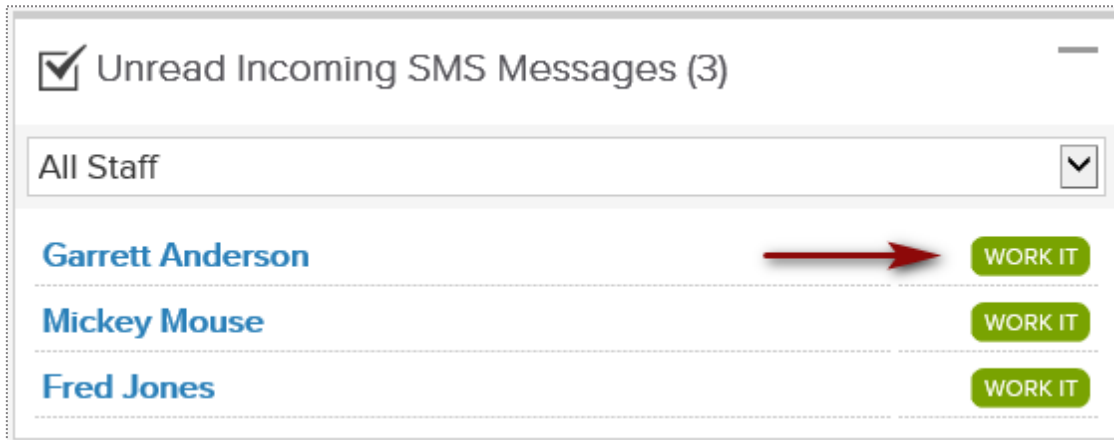
Widget: Unread Incoming SMS

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.


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


ContactSales ScriptsFast Book

[add task](#)

 Make A Phone Call

 Send An Email


 Send An SMS


 **Person to Person**


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

Last Talked Withjust now by Jacqueline Armstrong

Talks Last 30 Days1 times

 Jacqueline Armstrong just now (1/3/2017)

 talked - positive conversation


 Super nice!


Select The Outcome Of The Contact

enter details of contact..

Internal Sales (eg PT)

Do not add a new contact task


 Log The Contact

 **TITLE BOXING CLUB**

13

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.

 **Mr Customer**


No Lead Type


[more options for Mr](#)

Contact

Sales Scripts

Fast Book

 add task

 log call

Book That Prospect

Hi there. My name is _____, and I'm a personal trainer here. Are you new to the club?

I thought so. How exciting!

Well, welcome to the club, _____. Hey, I know when you first join a new club, you sometimes have questions about the equipment, where things are, or proper club etiquette. I'd love to take you through a complimentary tour—all new members get one.

Have you always exercised, or are you just getting started?

Do you have any injuries?


What are your goals?

Why don't I book you for some time in the next few days to get you started off on the right foot?

Great!

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.

 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

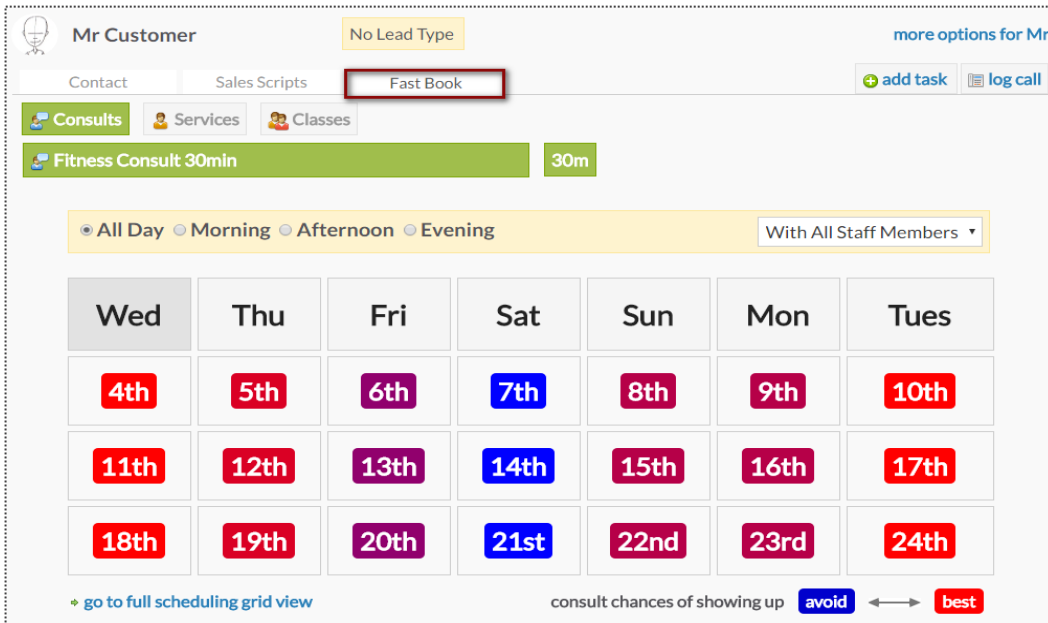
 Consults

 Services

 Classes

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.



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

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

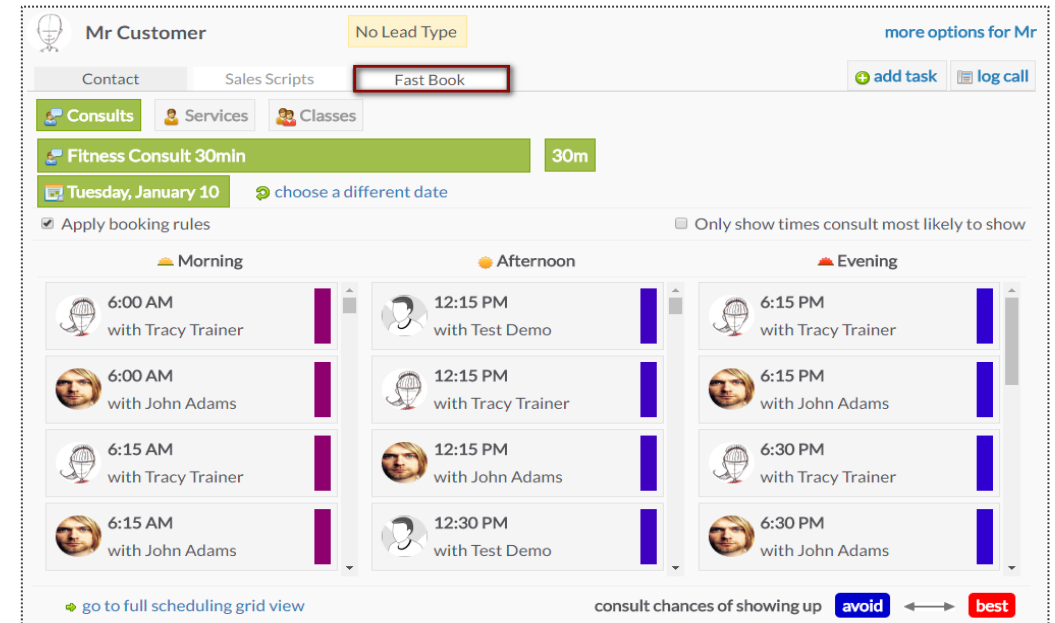
[Consults](#) [Services](#) [Classes](#)

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



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

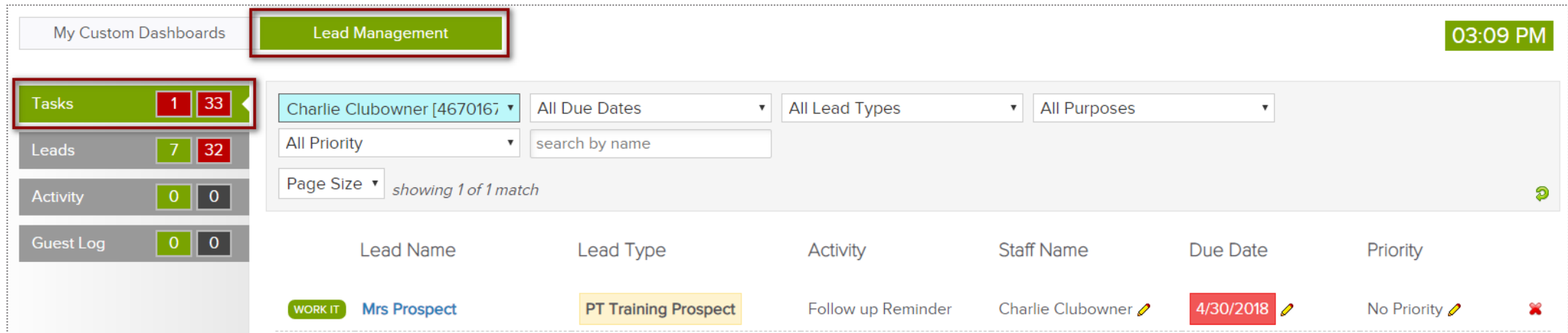
Morning	Afternoon	Evening
6:00 AM with Tracy Trainer	12:15 PM with Test Demo	6:15 PM with Tracy Trainer
6:00 AM with John Adams	12:15 PM with Tracy Trainer	6:15 PM with John Adams
6:15 AM with Tracy Trainer	12:15 PM with John Adams	6:30 PM with Tracy Trainer
6:15 AM with John Adams	12:30 PM with Test Demo	6:30 PM with John Adams

[go to full scheduling grid view](#) consult chances of showing up avoid best

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.



My Custom Dashboards **Lead Management** 03:09 PM

Tasks 1 33

Leads 7 32

Activity 0 0

Guest Log 0 0

Charlie Clubowner [4670167] All Due Dates All Lead Types All Purposes

All Priority search by name

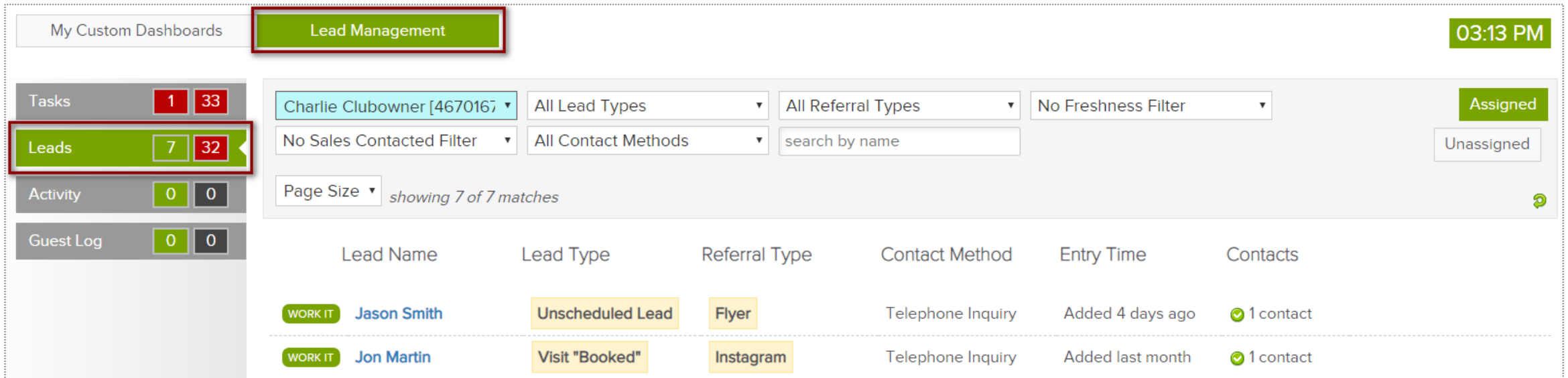
Page Size showing 1 of 1 match

Lead Name	Lead Type	Activity	Staff Name	Due Date	Priority
WORK IT Mrs Prospect	PT Training Prospect	Follow up Reminder	Charlie Clubowner	4/30/2018	No Priority

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.



My Custom Dashboards **Lead Management** 03:13 PM

Tasks 1 33
Leads 7 32
Activity 0 0
Guest Log 0 0

Charlie Clubowner [4670167] All Lead Types All Referral Types No Freshness Filter
No Sales Contacted Filter All Contact Methods search by name
Page Size showing 7 of 7 matches

Assigned
Unassigned

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

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

4

Calls Made

1

Emails Sent

1

SMS Sent

1

Person to Person

1

Bookings

0

Today

0

Tomorrow

0

Future

0

New Leads

1

Referrals

1

Walk In

0

Phone

0

Email / Web

0

Guerilla Marketing

0

New Deals

0

Members Created

0

POS Referrals

0

12am

2am

4am

6am

8am

10am

12pm

2pm

4pm

6pm

8pm

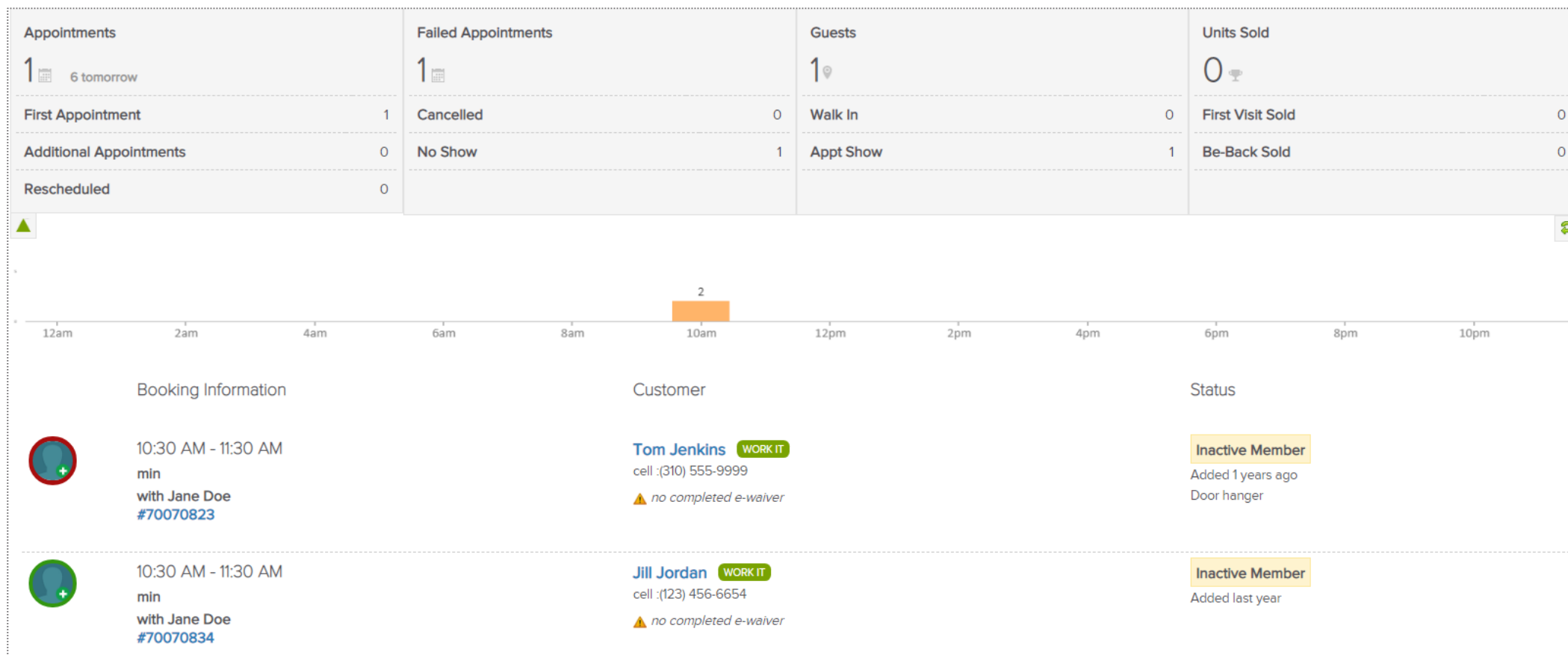
10pm

5

	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

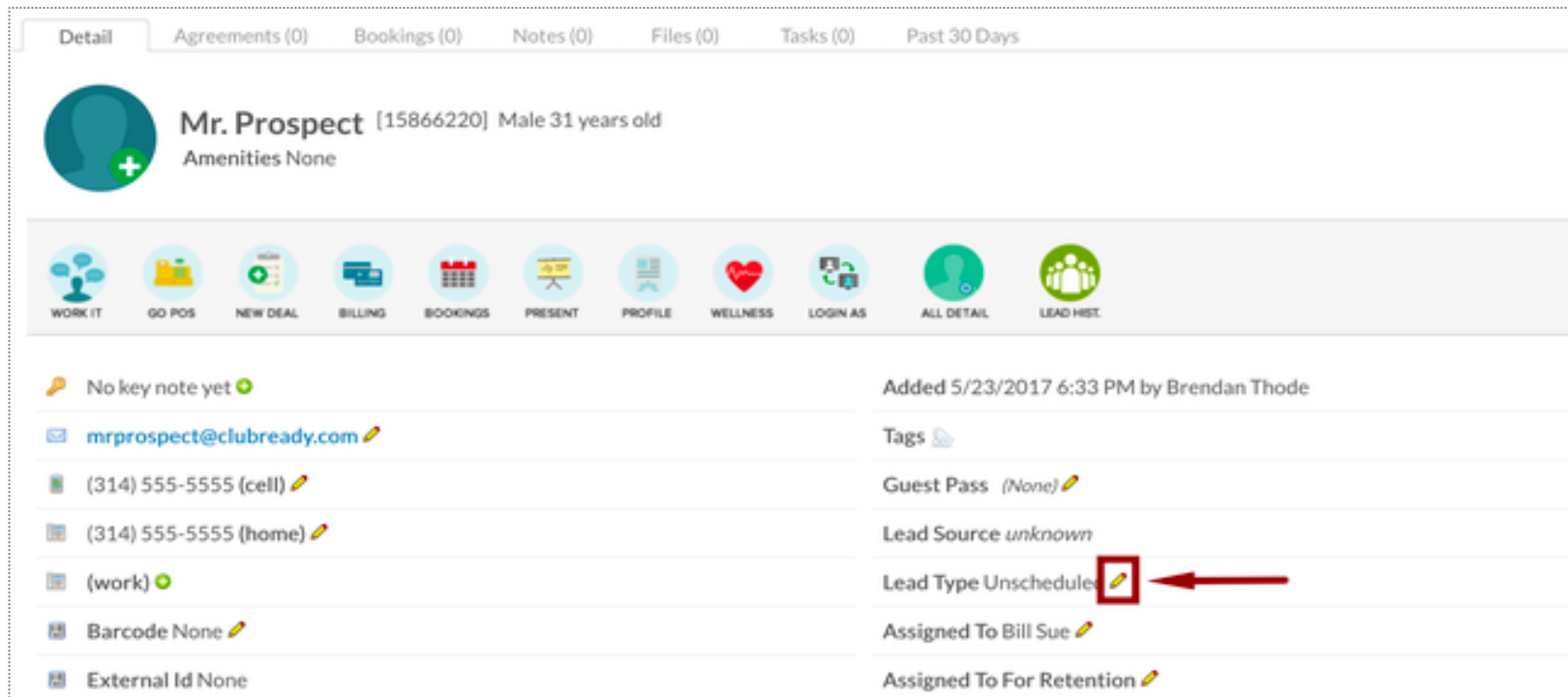
Gender <small>REQ</small>	<input type="radio"/> Male <input type="radio"/> Female
<input checked="" type="checkbox"/> include in duplicate search	
First Name <small>REQ</small>	<input type="text"/>
<input checked="" type="checkbox"/> include in duplicate search	
Last Name <small>REQ</small>	<input type="text"/>
<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  (this is never visible to the prospect)	
Referred by Customer	<input type="text"/> start typing (at least 3 characters) to select from list
Heard About Club How?	Select How They Heard 
Lead Type <small>REQ</small>	Select A Prospect Type 
<input checked="" type="checkbox"/> Email Is Sent?	<input checked="" type="checkbox"/> Yes - New Prospect Email email template is used info about this
ClubReady Login Available? <small>REQ</small>	Select 

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.







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



 **Mr. Prospect** [15866220] Male 31 years old
Amenities None



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



 No key note yet 


 mrprospect@clubready.com 

 (314) 555-5555 (cell) 


 (314) 555-5555 (home) 


 (work) 

 Barcode None 



 External Id None


Added 5/23/2017 6:33 PM by Brendan Thode


Tags 

Guest Pass (None) 

Lead Source unknown

Lead Type Unschedule  

Assigned To Bill Sue 

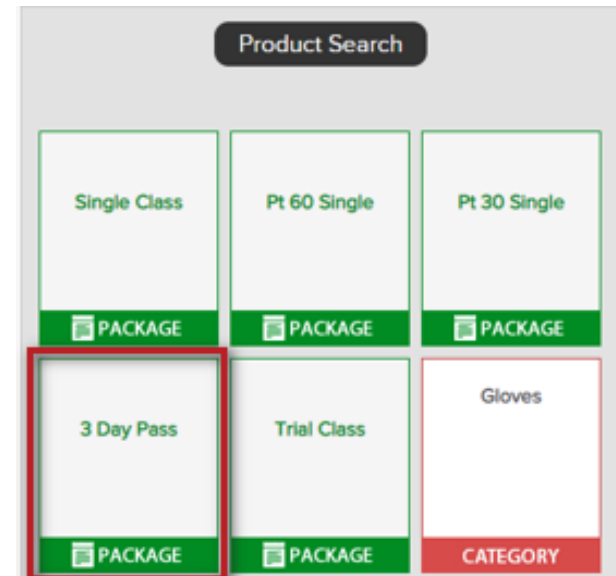
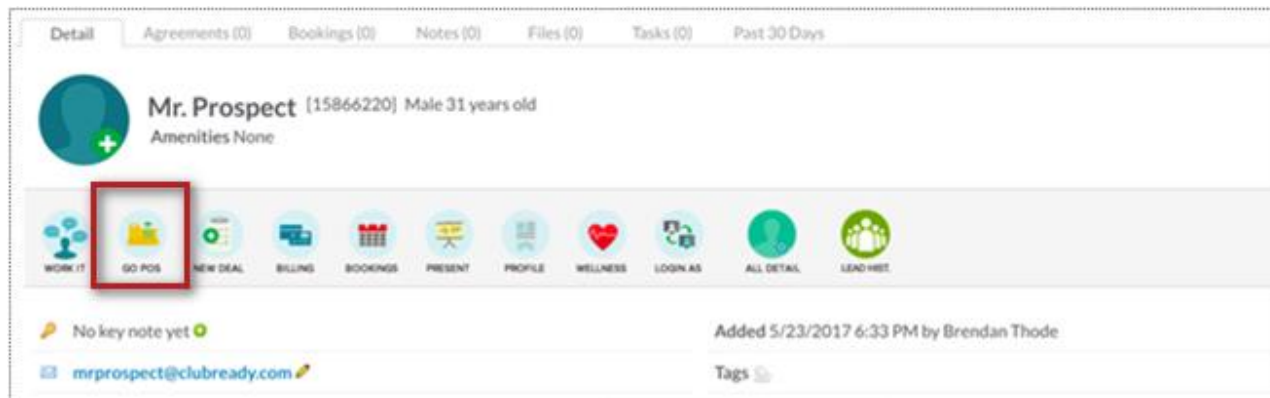
Assigned To For Retention 

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.





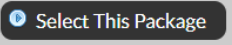


Issue Trial Membership: New Deal

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.


 Trial Memberships - Pass [go back](#)


	\$0.00 - Trial Class view details	
	\$0.00 - 3 Day Pass view details	
	\$0.00 - 7-Day Pass view details	

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 <small>(REQ)</small>	Mr
<input checked="" type="checkbox"/> include in duplicate search	
Last Name <small>(REQ)</small>	Customer
<input checked="" type="checkbox"/> include in duplicate search	
Gender <small>(REQ)</small>	<input checked="" type="radio"/> MALE <input type="radio"/> FEMALE
<input checked="" type="checkbox"/> include in duplicate search	
Date Of Birth	Month <input type="text"/> Day <input type="text"/> Year <input type="text"/>
Address <small>(REQ)</small>	1 Main Street
City <small>(REQ)</small>	Anywhere
State <small>(REQ)</small>	MO
ZIP Code <small>(REQ)</small>	63001
Email <small>(REQ)</small>	customer@clubready.com
<input checked="" type="checkbox"/> include in duplicate search	
Cell Phone <small>(REQ)</small>	(555) 123-4141
<input checked="" type="checkbox"/> include in duplicate search	
Home Phone <small>(REQ)</small>	(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.

Write Up A New Agreement For Mr Customer [4941563]

Step 1 Agreement Setup

Step 2 Review & Finalize

Step 3 Complete

SECURE

Basic Membership Plan (\$50.00)
[choose a different sales package](#) | [go to setup for this sales package](#)

Installment Duration 1 Month

Buyers Name
Mr Customer

Select Initial Term Below (click to select)

6 Months At \$50.00 each installment

12 Months At \$50.00 each installment

Included Amenities (click amenity to open description)

Choose Up To 2 Of The Following 1 Amenities

Yes No

Unlimited Classes (adds \$10.00 + \$0.00 tax per installment)

Agreement Classification

Show Agreement Classification

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.

Opportunity Setup

minimize installment list

\$

Update All 6 Installment Prices

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

Auto-Renew Evergreen

explain

Yes

No

(Basic Membership Plan) At \$ 50

Annual Enhancement Fee

Yes

No

\$ 50 on 5/10/2018 every 12 months

Term Total Price	\$300.00
Term Amount Paid Today	\$50.00
Amenity Term Total	\$0.00
Amenity Total Today	\$0.00
Subtotal	\$50.00
Sales Tax	\$0.00
Account Credit Balance	\$0.00
Total Due Today	\$50.00

PTP Option

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**.


Opportunity Setup

Select Package Discount ▾

Enter Promo Code

✓ Apply Discount

Reset Discount

# 1	 Down	\$ 29.99 + tax	11/10/2017
Total Price (taxed @ 7.000%)		\$29.99	
Amenity Term Total		\$0.00	
Amenity Total Today		\$0.00	
Subtotal		\$29.99	
Sales Tax		\$2.10	
Account Credit Balance		\$0.00	
Total Due Today ✓		\$32.09	

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**.



The screenshot shows a form with three main sections: 'Responsible Staff', 'Assign Staff', and 'Optional Note'. The 'Responsible Staff' section has a dropdown menu labeled 'Choose staff for sale'. The 'Assign Staff' section has a dropdown menu labeled 'Choose staff member'. The 'Optional Note' section has a text area with the placeholder 'Enter an optional note here....'. At the bottom of the form is a dark button with a blue icon and the text 'SAVE AND GO TO STEP 2 - Review & Finalize'. A small profile icon is visible in the top right corner of the form area.

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**

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.

Step 1
Agreement Setup

Step 2
Review & Finalize

Step 3
Complete



Review [hide review details](#)

✓ Base Monthly

✓ Total initial term price is \$9.95

✓ Initiation: \$40.00 to be paid today

✓ Total Down Payment Today \$49.95


✓ Installment payment is today for \$9.95


✓ Then auto-renew at \$9.95

✓ Crunch Enhancement Fee every 12 months starting on 8/1/2017 (\$39.00)

Agreement

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

 UNSIGNED AGREEMENT
CLICK TO REVIEW & SIGN

 CLICK HERE TO
ONLY TAKE 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

Signature

05/11/2017



Electronic Signature 1 of 1

CLICK TO SKIP THIS SIGNATURE

Sign here!

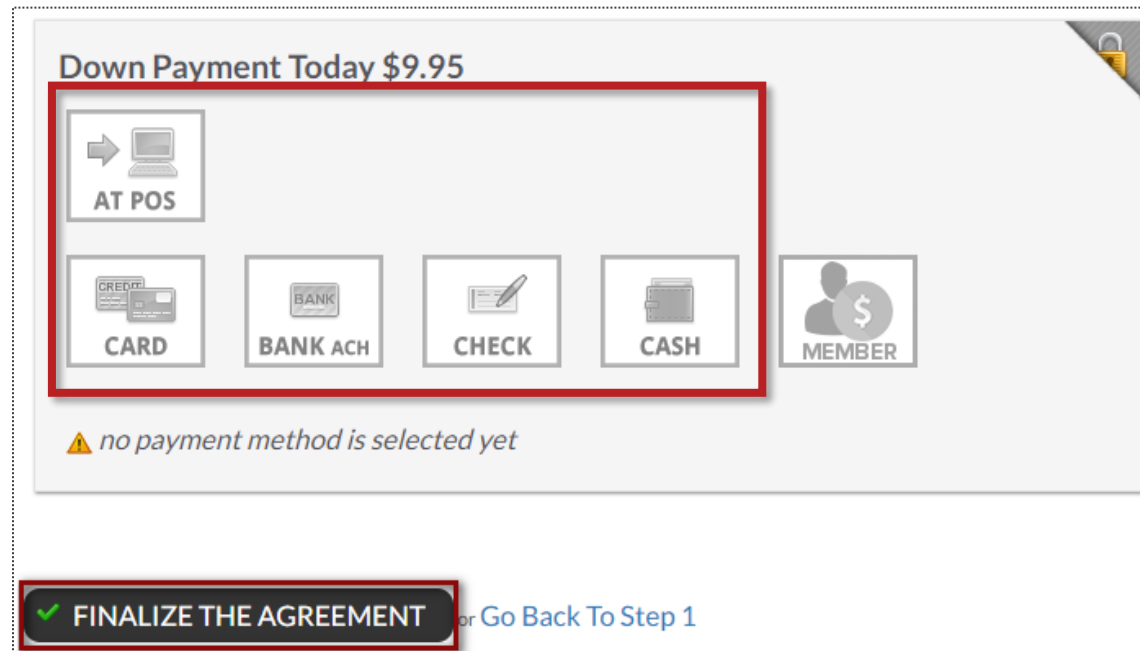
M. Carstone

cancel

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'.



The screenshot displays a payment interface with the title "Down Payment Today \$9.95" in the top left corner. A red rectangular box highlights a group of five payment options: "AT POS" (with a laptop icon), "CARD" (with a credit card icon), "BANK ACH" (with a bank icon), "CHECK" (with a check icon), and "CASH" (with a cash icon). To the right of this group is a "MEMBER" option with a person and dollar sign icon. Below the payment options, a yellow warning icon is followed by the text "no payment method is selected yet". At the bottom of the screen, there is a dark button with a green checkmark and the text "FINALIZE THE AGREEMENT", and a blue link that says "or Go Back To Step 1".



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.

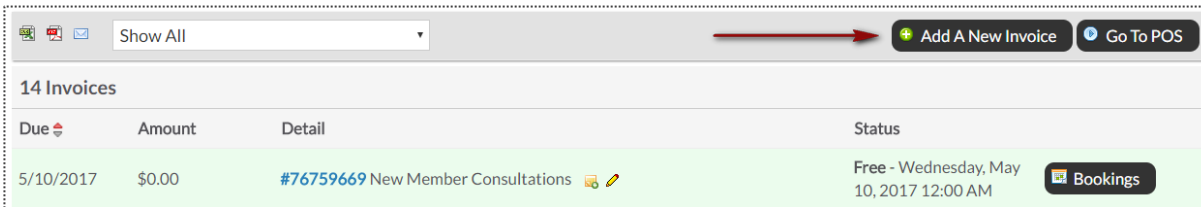
Invoice Detail (#76811337) PAID 	
Name	Mister Customer
Amount	\$180.00  Issue A Refund
Payment Due Date	5/11/2017
Detail	30Min Personal Training 4xMonth (monthly)

#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 <small>credits will be automatically deleted</small>
Optional Note	
 Refund \$180 or cancel	

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**



14 Invoices

Due	Amount	Detail	Status
5/10/2017	\$0.00	#76759669 New Member Consultations	Free - Wednesday, May 10, 2017 12:00 AM

Add A New Invoice **Go To POS**

+ Add A New Invoice

Don't Tie To An Existing Agreement

Select Sales Package or Fee Type

None
Cancellation Fee
Freeze Fee

Enter Invoice Description

Enter Invoice \$ Amount

\$

Enter Payment Due Date

6/9/2017

Enter An Optional Note

+ Create New Invoice or cancel


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.

[Detail](#) [Agreements \(2\)](#) [Bookings \(0\)](#) [Notes \(9\)](#) [Files \(2\)](#) [Tasks \(0\)](#) [Past 30 Days](#)

**Mister Customer** [15430951] Male
Member since 5/10/2017 ends 3/1/2019

[WORK IT](#) [GO POS](#) [NEW DEAL](#) [BILLING](#) [BOOKINGS](#) [PRESENT](#) [PROFILE](#) [ALL DETAIL](#) [LEAD HIST.](#)

Agreements List

5/11/2017	Active Draft	\$1,080.00 (#4920210) 6 x 30Min Personal Training 4xMonth (monthly)  agr5844-15430951-11174724-c20273-sg2402 ELECTRONIC SIGNATURE	Full Details
-----------	---------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------

Agreement Freeze Options

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

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


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.


[Detail](#) [Agreements \(2\)](#) [Bookings \(0\)](#) [Notes \(9\)](#) [Files \(2\)](#) [Tasks \(0\)](#) [Past 30 Days](#)


**Mister Customer** [15430951] Male
Member since 5/10/2017 ends 3/1/2019


[WORK IT](#) [GO POS](#) [NEW DEAL](#) [BILLING](#) [BOOKINGS](#) [PRESENT](#) [PROFILE](#) [ALL DETAIL](#) [LEAD HIST.](#)

Agreements List

5/11/2017	 Active Draft	\$1,080.00 (#4920210) 6 x 30Min Personal Training 4xMonth (monthly)  agr5844-15430951-11174724-c20273-sg2402  ELECTRONIC SIGNATURE	Full Details
-----------	--------------------------------------------------------------------------------------------------	----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	------------------------------

 [Cancel This Agreement Effective Immediately](#)

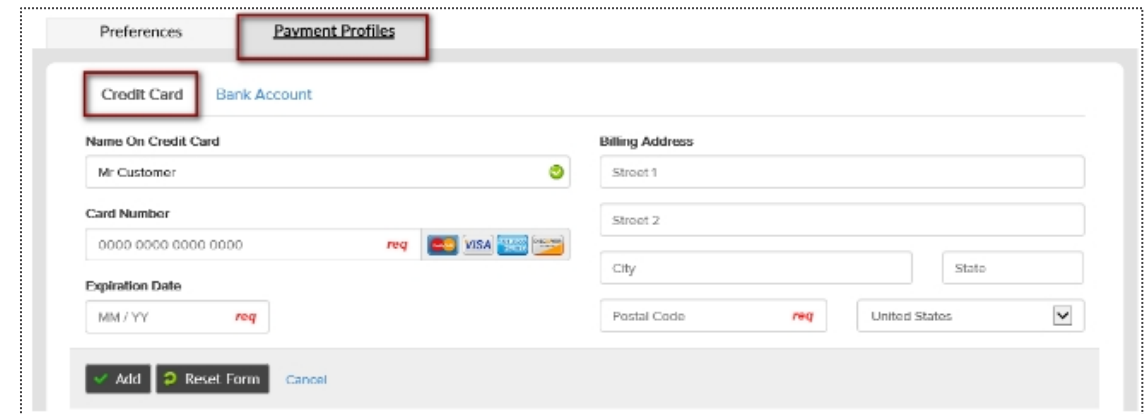
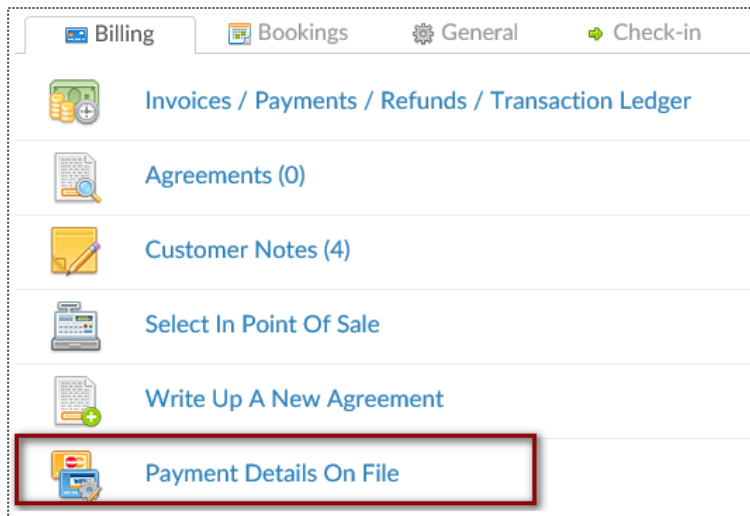
 [Schedule This Agreement To Auto-Cancel On A Future Date](#)

 [Cancel & Refund All Payments To A Credit Balance For A Re-Write](#)

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.



The screenshot shows the 'Payment Profiles' form. The 'Credit Card' tab is selected and highlighted with a red box. The form contains the following fields and options:

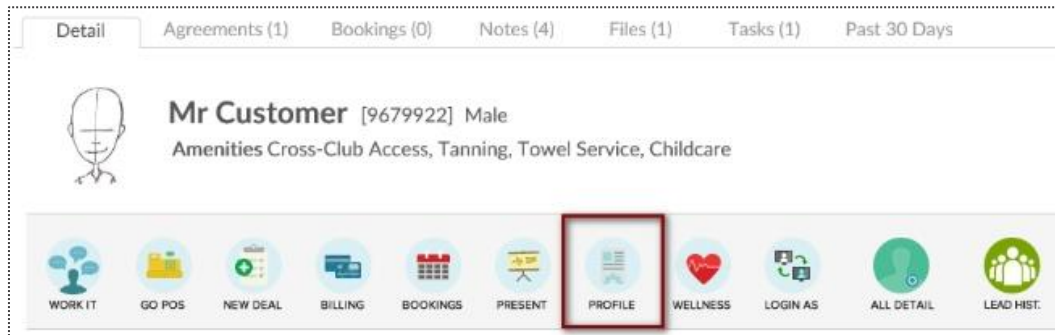
- Payment Profiles** (tab selected)
- Credit Card** (tab selected)
- Bank Account** (tab)
- Name On Credit Card**: Text field with 'Mr Customer' and a green checkmark.
- Card Number**: Text field with '0000 0000 0000 0000' and a red 'req' label. Below the field are icons for MasterCard, VISA, American Express, and Discover.
- Expiration Date**: Text field with 'MM / YY' and a red 'req' label.
- Billing Address**: Text field with 'Street 1'.
- Street 2**: Text field.
- City**: Text field.
- State**: Text field.
- Postal Code**: Text field with a red 'req' label.
- United States**: Dropdown menu with a checkmark.
- Buttons**: 'Add' (green checkmark), 'Reset Form' (pencil icon), and 'Cancel' (blue text).

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.



Detail | Agreements (1) | Bookings (0) | Notes (4) | Files (1) | Tasks (1) | Past 30 Days

 **Mr Customer** [9679922] Male
Amenities Cross-Club Access, Tanning, Towel Service, Childcare

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

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

Add a Photo

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

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

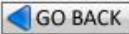
PROFILE

WELLNESS

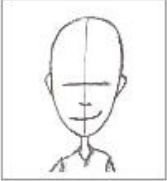
LOGIN AS


ALL DETAIL


LEAD HIST.

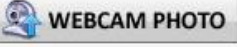
GO BACK

Added on 3/26/2013 4:35:10 PM



REMOVE PHOTO

UPLOAD A PHOTO

WEBCAM PHOTO

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.

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](#)



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.

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

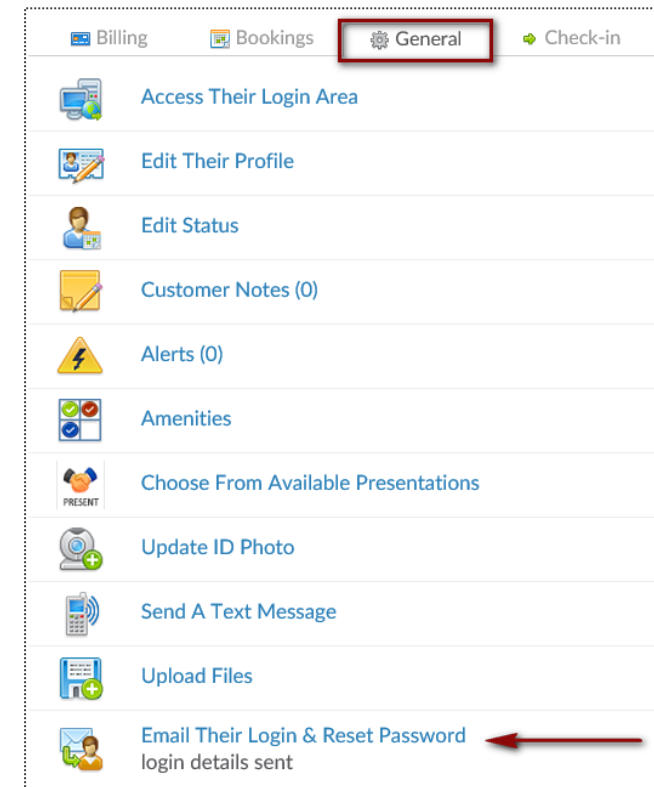
Add Alert

Existing Alerts

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.

1/1/2016

Jan

2016

Sun Mon Tue Wed Thu Fri Sat

					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

12/31/2016

Dec

2016

Sun Mon Tue Wed Thu Fri Sat

					1	2	3
4	5	6	7	8	9	10	
11	12	13	14	15	16	17	
18	19	20	21	22	23	24	
25	26	27	28	29	30	31	

Generate Report

Preset Date Ranges

Today	Yesterday	Prev 2 Days
This Week	Prev 7 Days	Prev 14 Days
This Month (Jan)	Jan 1 - 15	Jan 16 - 31
Prev Month (Dec)	Dec 1 - 15	Dec 16 - 31
Nov '16	Oct '16	Sep '16
2017	2016	2015

export to Excel

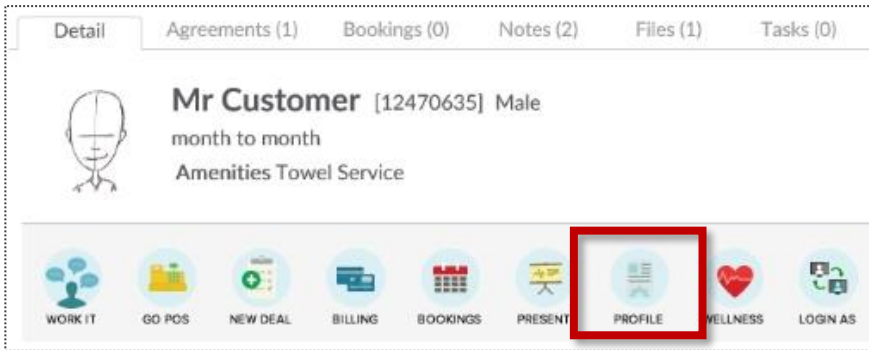
export to PDF

2 Check-ins found.

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]


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.



The screenshot shows a member profile for 'Mr Customer [12470635] Male'. The profile includes a headshot, subscription details ('month to month', 'Amenities Towel Service'), and a row of navigation icons. The 'PROFILE' icon, which depicts a person with a checkmark, is highlighted with a red rectangular box.

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



The screenshot displays a form for updating member information. Fields include 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, and Email Address (mrcustomer@clubready.com). A red rectangular box highlights the 'Phone' and 'Cell Phone' fields.

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 Managment	-	✓
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.


 Click To Lookup A Person

 Scan

 Last 5

\$0.00


Item	Quantity	Taxable	Price	Extended Price
------	----------	---------	-------	----------------

 Mister Customer [24062008]

\$89.00

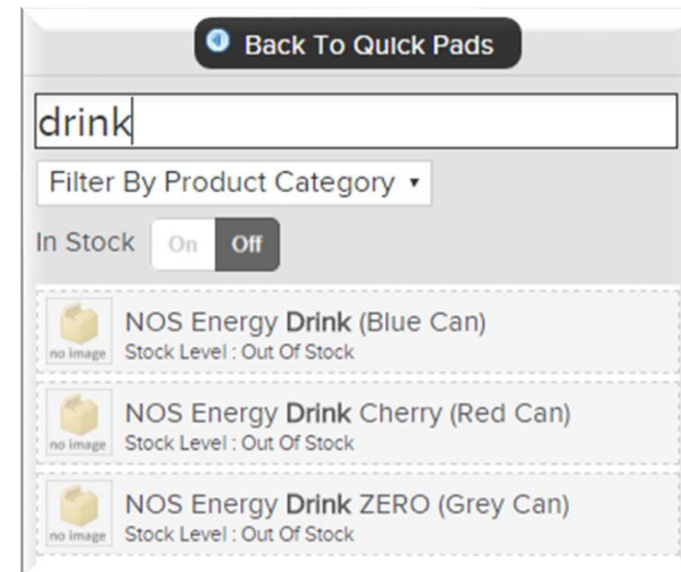
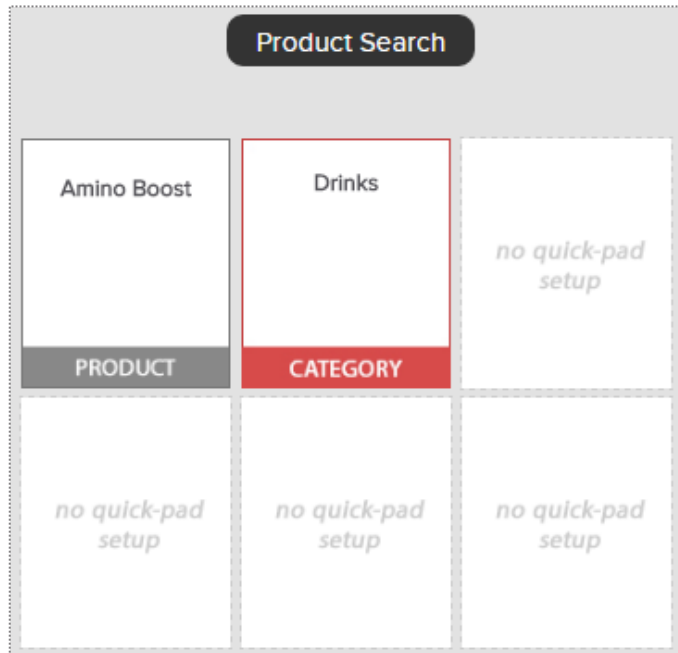
0 Open Carts

[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

POS: Selecting a Product

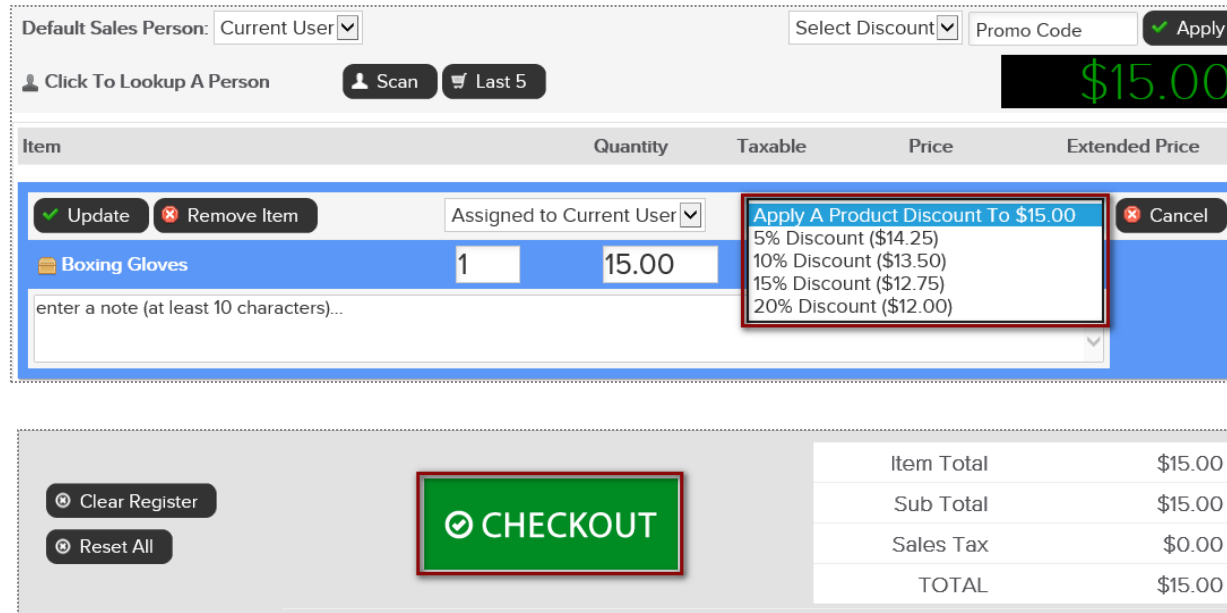
Select the individual product or choose a category. This can be done by selecting the quick pad or performing a **Product Search**. Clicking on the product will place it in the shopping cart.



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.



The screenshot displays the POS interface. At the top, there's a header with 'Default Sales Person: Current User', 'Select Discount', 'Promo Code', and an 'Apply' button. Below this is a section with 'Click To Lookup A Person', 'Scan', and 'Last 5' buttons. A large green price tag shows '\$15.00'. The main area is a table with columns: Item, Quantity, Taxable, Price, and Extended Price. The table contains one item: 'Boxing Gloves' with a quantity of 1 and a price of 15.00. Below the table, there's a note field and a dropdown menu for discounts. The dropdown menu is open, showing options: 'Apply A Product Discount To \$15.00', '5% Discount (\$14.25)', '10% Discount (\$13.50)', '15% Discount (\$12.75)', and '20% Discount (\$12.00)'. At the bottom, there's a 'CHECKOUT' button, 'Clear Register', and 'Reset All' buttons. To the right, a summary table shows: Item Total \$15.00, Sub Total \$15.00, Sales Tax \$0.00, and TOTAL \$15.00.

Item	Quantity	Taxable	Price	Extended Price
Boxing Gloves	1		15.00	

Item Total	\$15.00
Sub Total	\$15.00
Sales Tax	\$0.00
TOTAL	\$15.00

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.



Default Sales Person: Current User
Click To Lookup A Person **\$22.50**

Item	Quantity	Taxable	Price	Extended Price
Yoga Mat <input type="button" value="v"/> Blue <input type="button" value="v"/>	1	-	\$22.50	\$22.50
★ Discount: VIP Discount Applied (Saves \$7.50)				

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.

BALANCE DUE

\$15.00



+ ADD

123

456

789

0.


+ EXACT


✖ CLEAR + BILLS


Cash Tendered
\$0.00


CHANGE

\$0.00

 POS setup


 my permissions





Sale Assigned To 


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

Add Payments


CARD

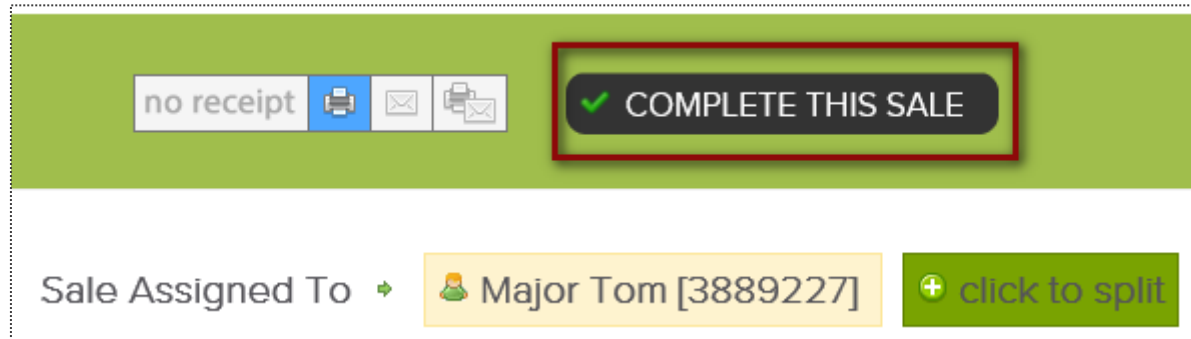

BANK ACH


EXTERNAL


CHECK

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.

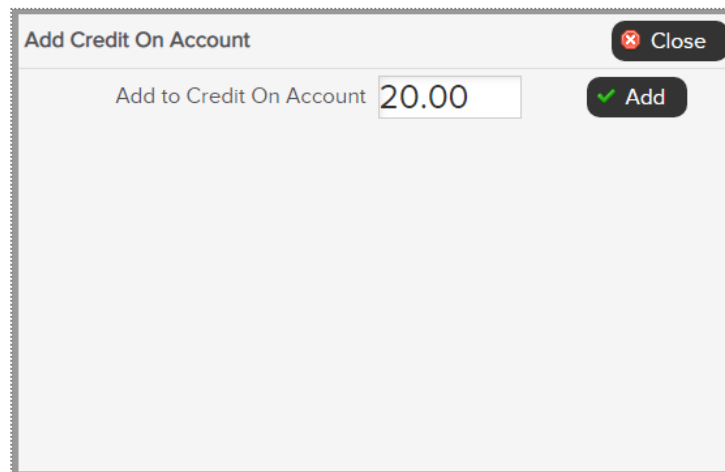
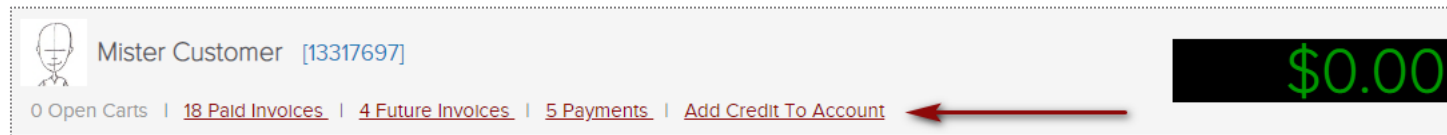


POS: Adding Credit on Account*

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 ☆

All Charges Unique Invoices ←

1/1/2018 12/31/2018

Mon Tue Wed Thu Fri Sat Sun

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 31

Mon Tue Wed Thu Fri Sat Sun

1 2

3 4 5 6 7 8 9

10 11 12 13 14 15 16

17 18 19 20 21 22 23

24 25 26 27 28 29 30

31

Only Show Automatic (Drafted) Charges: ☐ ⓘ

Excel Export Only ☐

RUN REPORT

Preset Date Ranges

Today	Yesterday	Prev 2 Days
This Week	Prev 7 Days	Prev 14 Days
This Month (Apr)	Apr 1 - 15	Apr 16 - 30
Prev Month (Mar)	Mar 1 - 15	Mar 16 - 31
Feb '19	Jan '19	Dec '18
2019	2018	2017

 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

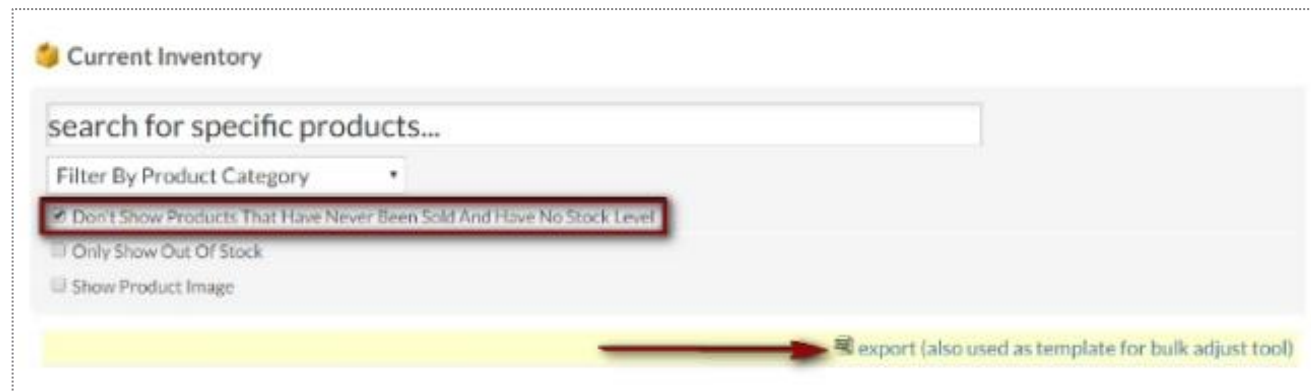
Report: Bulk Upload Inventory

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.



Current Inventory


search for specific products...

Filter By Product Category ▾

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

☐ Only Show Out Of Stock

☐ Show Product Image

 export (also used as template for bulk adjust tool)

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	88	\$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**.

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.

No file chosen

After you click upload your file will be examined. No adjustments are made until you confirm on the next page.

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.


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

	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	

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)


Make The Booking For Mr


Back


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 loses session) or **Cancellation is not Customer's fault** (client retains session).

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

 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](#)


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.

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





















 **Mr Customer [ID 2311063]** WORK IT

 **Personal Training 30 Mins Booking #40329770**


Thursday, January 5, 2017 8:00 AM with Tracy Trainer
 This session finished 5 hrs ago - has not yet been logged

Detail Notes (0) Cancel Re-Book **Log Off**

Previous 10 Bookings
(mouse over icons for more info)

Date	9/21	7/2	6/8	6/8	6/5	5/13	4/3	4/1	10/24	10/16
Shown										
Checkin										

Customer Validation

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

Click To Select Status

☒ Booking Completed Successfully ☐ Customer Did Not Show Up

Optional Note
(Client Does Not See This Note)

Booking #40329770 Note 1/5/2017 Fitness

☒ Log The Booking ☒ Log The Booking And Go To POS

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.

TIME / DATE	<div><div><div><div><div></div><div>+</div></div><div>ADD A CLASS</div></div></div><div>MON JAN 22</div></div>	<div><div><div><div><div></div><div>+</div></div><div>ADD A CLASS</div></div></div><div>TUE JAN 23</div></div>
6:00 AM	<div><div>50</div><div>Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div></div>	<div><div>50</div><div>Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div></div>
8:00 AM		
9:00 AM	<div><div>50</div><div>Connect (45 Mins) 9:00 AM - 9:45 AM No Instructor</div></div>	

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)

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.

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

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.


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

TIME / DATE	<small>ADD A CLASS</small> MON JAN 22	<small>ADD A CLASS</small> TUE JAN 23
6:00 AM	50 Classic (60 Mins) 6:00 AM - 7:00 AM Demo L	50 Classic (60 Mins) 6:00 AM - 7:00 AM Demo L
8:00 AM		
9:00 AM	50 Connect (45 Mins) 9:00 AM - 9:45 AM No Instructor	

MON JAN 22nd

Classic (60 Mins) Class
6:00 AM - 7:00 AM
Demo Login

Book This For
Mr Customer



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

Customer Notification

☒ Send Mr An Email To
customer@email.com

☐ Send A Text Message (requires credits)

Optional Internal Note (Mr will not see it)

Make The Class Booking For Mr



Back





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.

TIME / DATE	 ADD A CLASS MON JAN 22	 ADD A CLASS TUE JAN 23
6:00 AM	<div>50 Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div>	<div>50 Classic (60 Mins) 6:00 AM - 7:00 AM Demo L</div>
8:00 AM		
9:00 AM	<div>50 Connect (45 Mins) 9:00 AM - 9:45 AM No Instructor</div>	


 Mr Customer [ID 9679922] 
 Green Training 60 Mins Class Booking #39312657
Monday, November 28, 2016 10:00 AM with Major Tom
 This session finished 3 days and 3 hrs ago - has not yet been logged

 Detail  Notes (0)  Cancel  Re-Book  Log Off

Previous 10 Bookings
(mouse over icons for more info)

There are no previous bookings

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 #39312657 Note 11/28/2016 Fitness

This booking currently has no associated session credit (is unpaid).
Please select one of the options below.

☒ Do nothing - an invoice can be created later
☐ Create an invoice, due for the single session price of \$

 Log The Booking  Log The Booking And Go To POS

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:

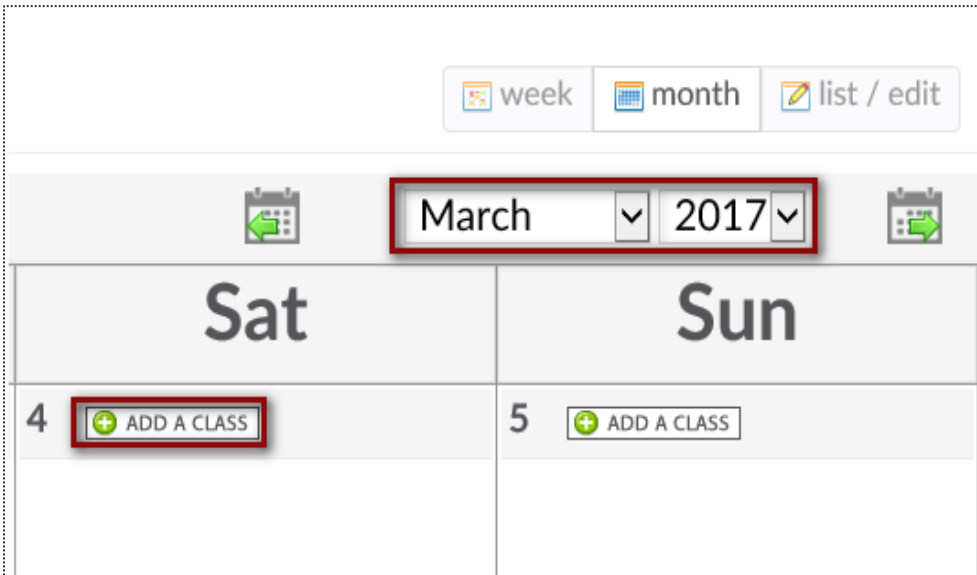
1. All Sales staff members must be enabled for scheduling of the class type/consult “First Visitor(s)”.
2. Must have Sales staff permission type or higher.

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.



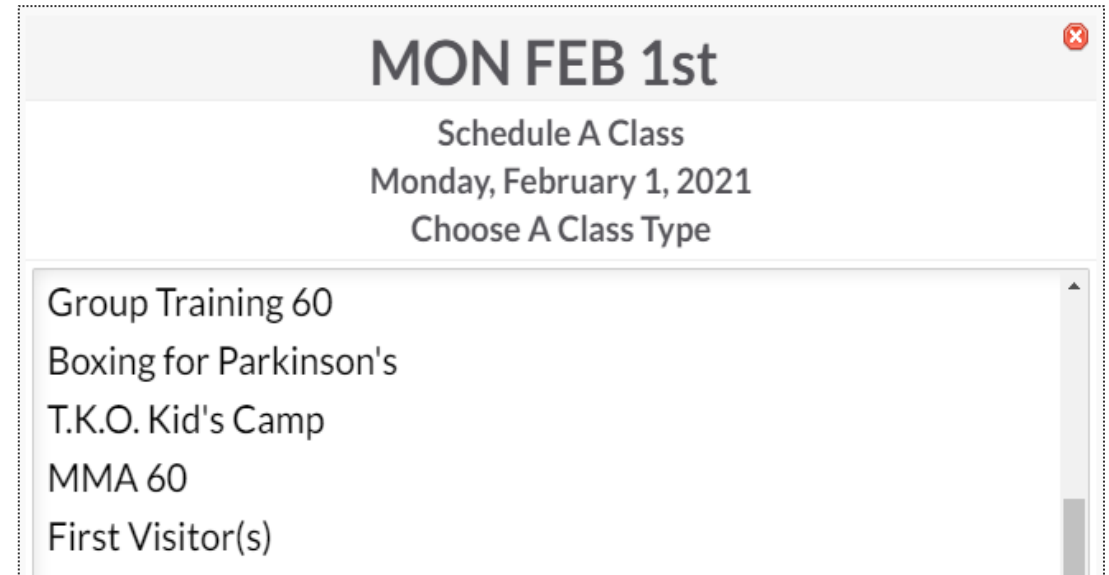
week month list / edit

March 2017

Sat Sun

4 + ADD A CLASS

5 + ADD A CLASS



MON FEB 1st

Schedule A Class

Monday, February 1, 2021

Choose A Class Type

Group Training 60

Boxing for Parkinson's

T.K.O. Kid's Camp

MMA 60

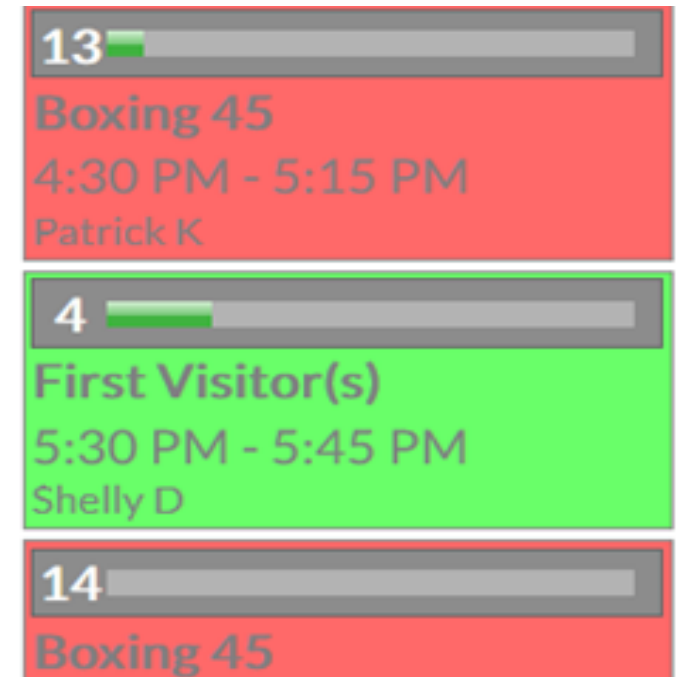
First Visitor(s)

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@tr

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 <i>leads added during report range</i>	New Waiver Members <i>lead added during report range has waiver</i>	All New Members <i>during report range</i>	Conversion % <i>All New Members / Waiver Count</i>
	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)

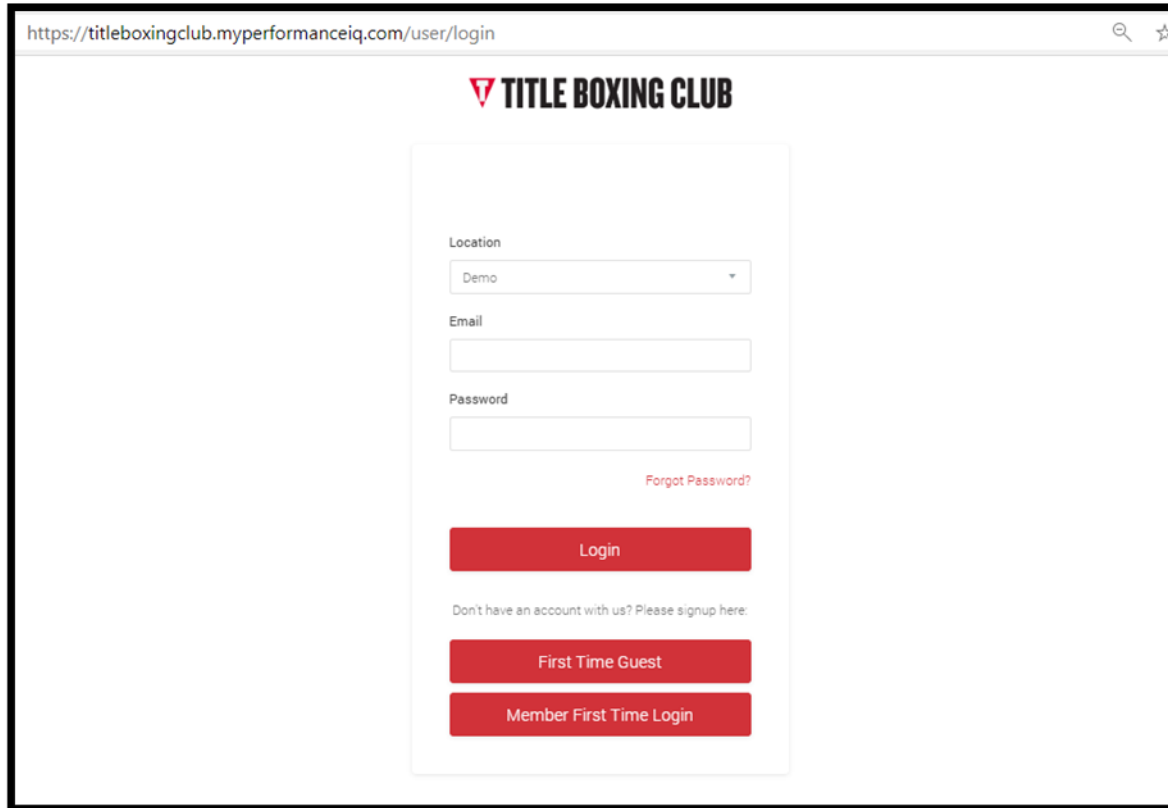
1 Classes - 1 Instructors - 9 Members

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
<input type="checkbox"/> 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?



The screenshot shows a web browser window with the URL `https://titleboxingclub.myperformanceiq.com/user/login`. The page features the TITLE BOXING CLUB logo at the top. Below the logo is a login form with the following fields and options:

- Location:** A dropdown menu currently showing "Demo".
- Email:** A text input field.
- Password:** A text input field.
- Forgot Password?** A link in red text below the password field.
- Login:** A red button.
- Don't have an account with us? Please signup here:** A text prompt.
- First Time Guest:** A red button.
- Member First Time Login:** A red button.

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

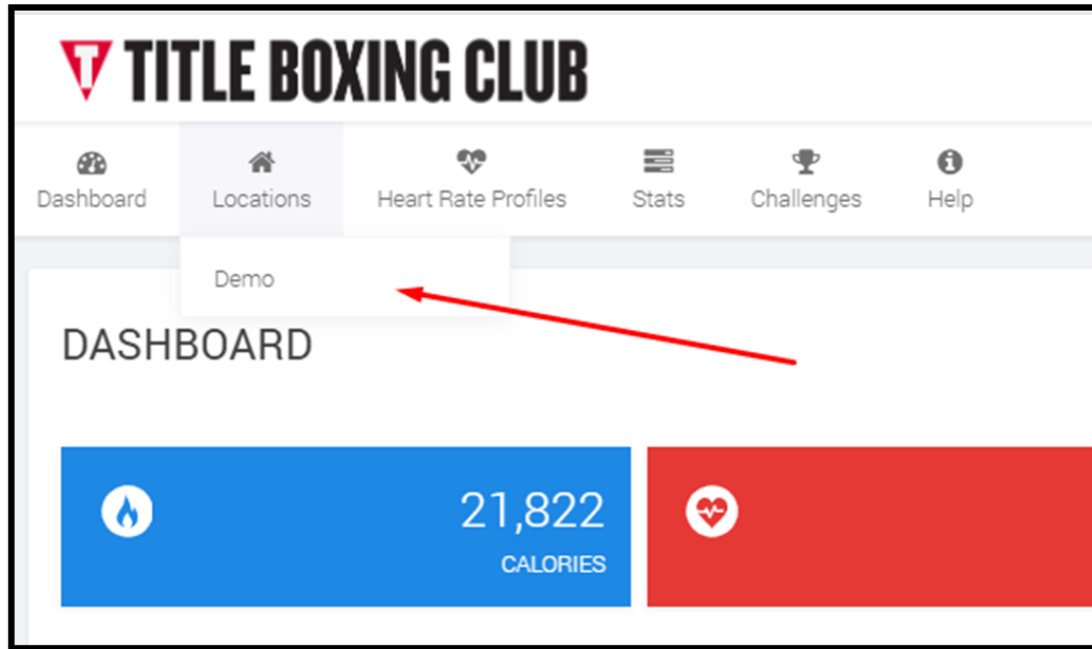


Login URL: <https://titleboxingclub.myperformanceiq.com/user/login>

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

TITLE BOXING CLUB

Dashboard Locations Heart Rate Profiles Stats Challenges Help

Reservations Class Types Users Class Packages Instructors Room Layout

09-14-2020 to 09-20-2020

Mon Sept 14, 2020

08:30 am	Boxing 45	(0/45)
12:00 pm	Boxing 45	(1/45)
05:30 pm	Boxing 45	(1/45)

Tue Sept 15, 2020

08:30 am	Boxing 45	(0/45)
12:00 pm	Boxing 45	(0/45)
04:30 pm	Boxing 45	(0/45)
05:30 pm	Boxing 45	(0/45)
06:30 pm	Boxing 45	(0/45)

Wed Sept 16, 2020

Please select

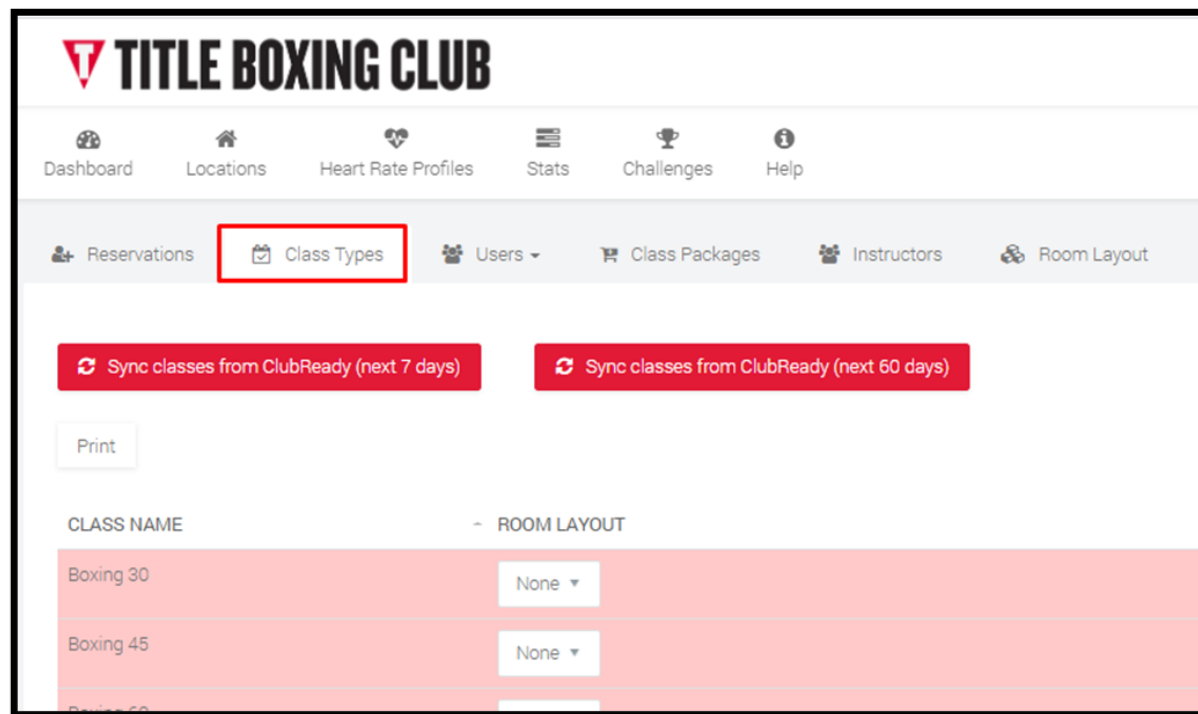
Shows class schedule, class details, and attendees.

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

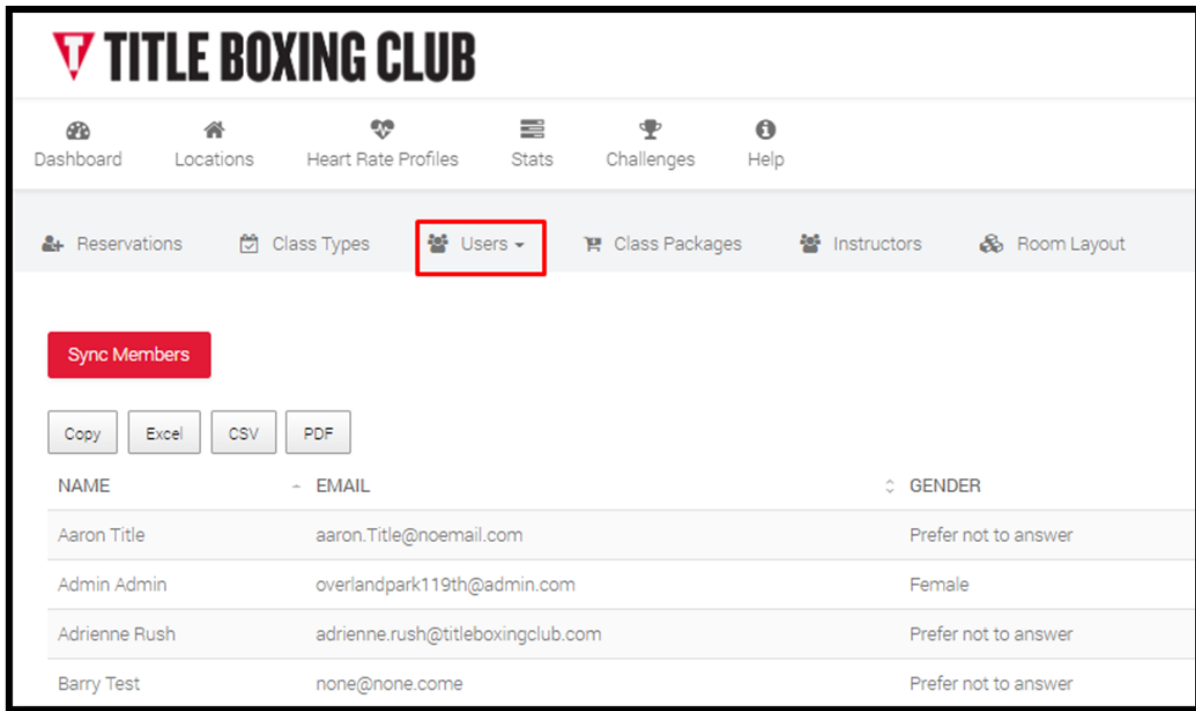


Shows all class types that have been synced from ClubReady that are enabled and visible in the app.

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



The screenshot shows the TITLE Boxing Club Admin Panel. The top navigation bar includes links for Dashboard, Locations, Heart Rate Profiles, Stats, Challenges, and Help. Below this, a secondary navigation bar features links for Reservations, Class Types, Users (highlighted with a red box), Class Packages, Instructors, and Room Layout. The main content area displays a 'Sync Members' button and export options (Copy, Excel, CSV, PDF). A table lists user accounts with columns for NAME, EMAIL, and GENDER.

NAME	EMAIL	GENDER
Aaron Title	aaron.Title@noemail.com	Prefer not to answer
Admin Admin	overlandpark119th@admin.com	Female
Adrienne Rush	adrienne.rush@titleboxingclub.com	Prefer not to answer
Barry Test	none@none.come	Prefer not to answer

Users tab will show all accounts from your ClubReady site

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

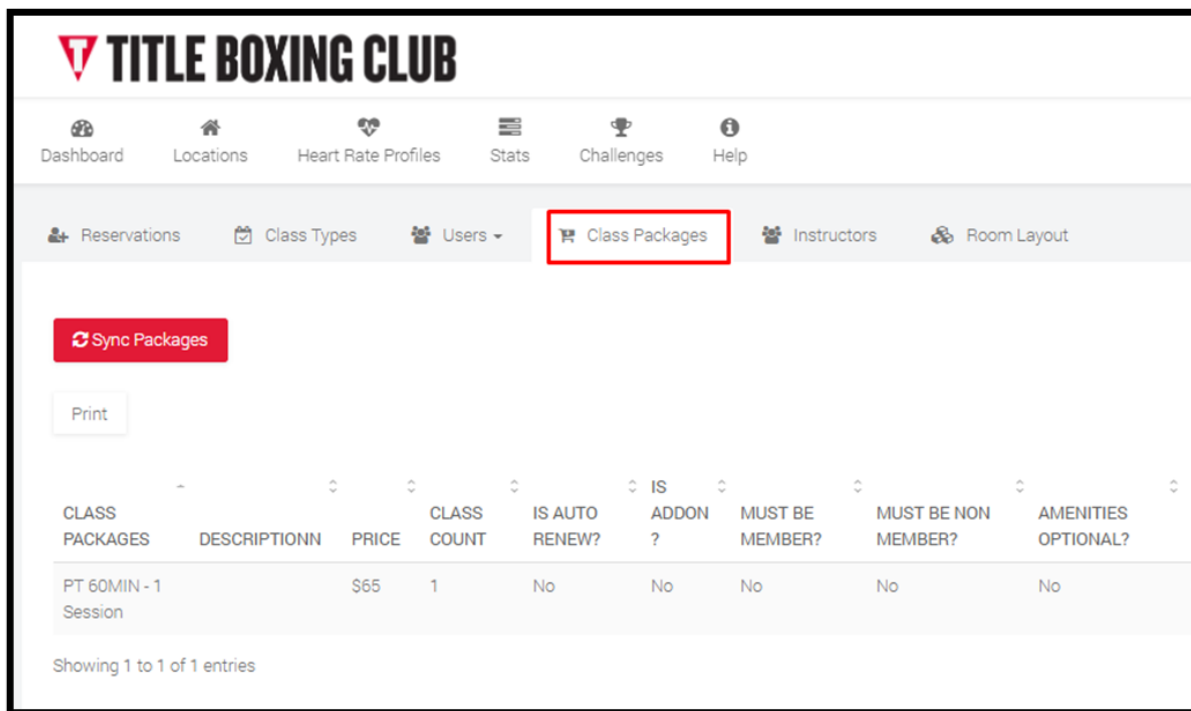
Members = all members

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)

TITLE Boxing Club Admin Panel: Locations > Class Packages



The screenshot displays the TITLE Boxing Club Admin Panel interface. At the top, the logo and name 'TITLE BOXING CLUB' are visible. Below this is a navigation bar with icons for Dashboard, Locations, Heart Rate Profiles, Stats, Challenges, and Help. A secondary navigation bar contains links for Reservations, Class Types, Users, Class Packages (highlighted with a red box), Instructors, and Room Layout. The main content area features a red 'Sync Packages' button and a 'Print' button. Below these is a table with the following columns: CLASS PACKAGES, DESCRIPTION, PRICE, CLASS COUNT, IS AUTO RENEW?, IS ADDON?, MUST BE MEMBER?, MUST BE NON MEMBER?, and AMENITIES OPTIONAL?. A single entry is listed: 'PT 60MIN - 1 Session' with a price of '\$65' and a count of '1'. The bottom of the table indicates 'Showing 1 to 1 of 1 entries'.

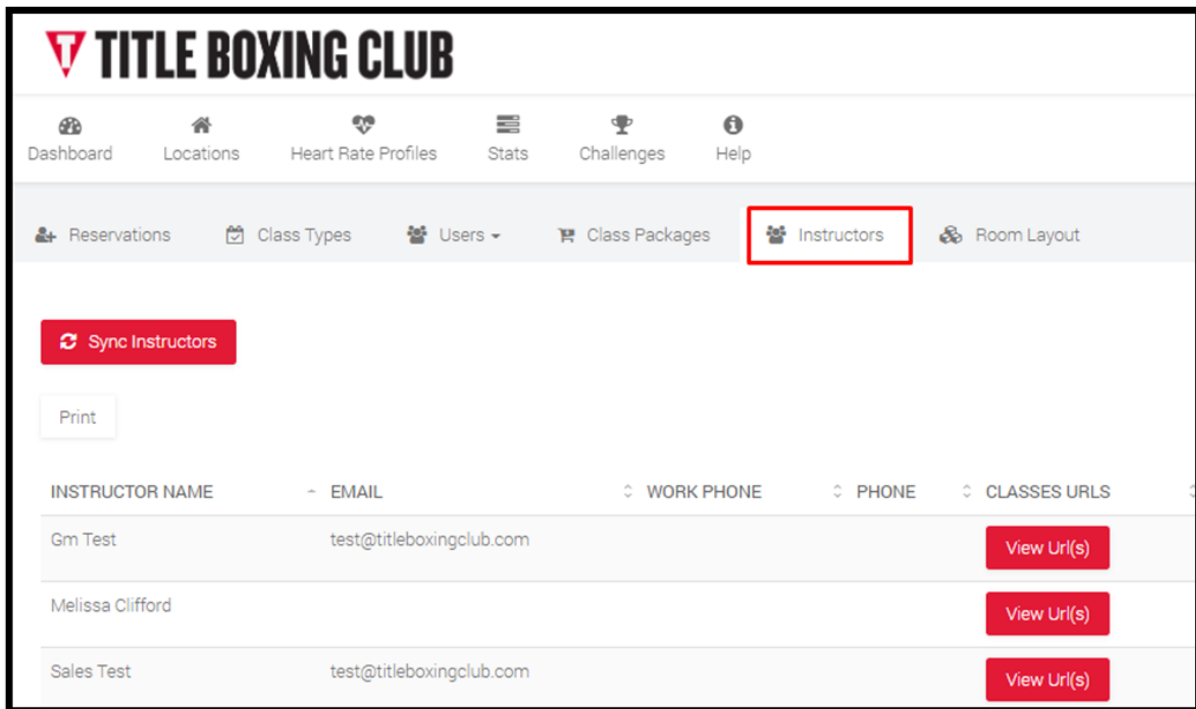
CLASS PACKAGES	DESCRIPTION	PRICE	CLASS COUNT	IS AUTO RENEW?	IS ADDON?	MUST BE MEMBER?	MUST BE NON MEMBER?	AMENITIES OPTIONAL?
PT 60MIN - 1 Session		\$65	1	No	No	No	No	No

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



TITLE BOXING CLUB

Dashboard Locations Heart Rate Profiles Stats Challenges Help

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

[Sync Instructors](#)

[Print](#)

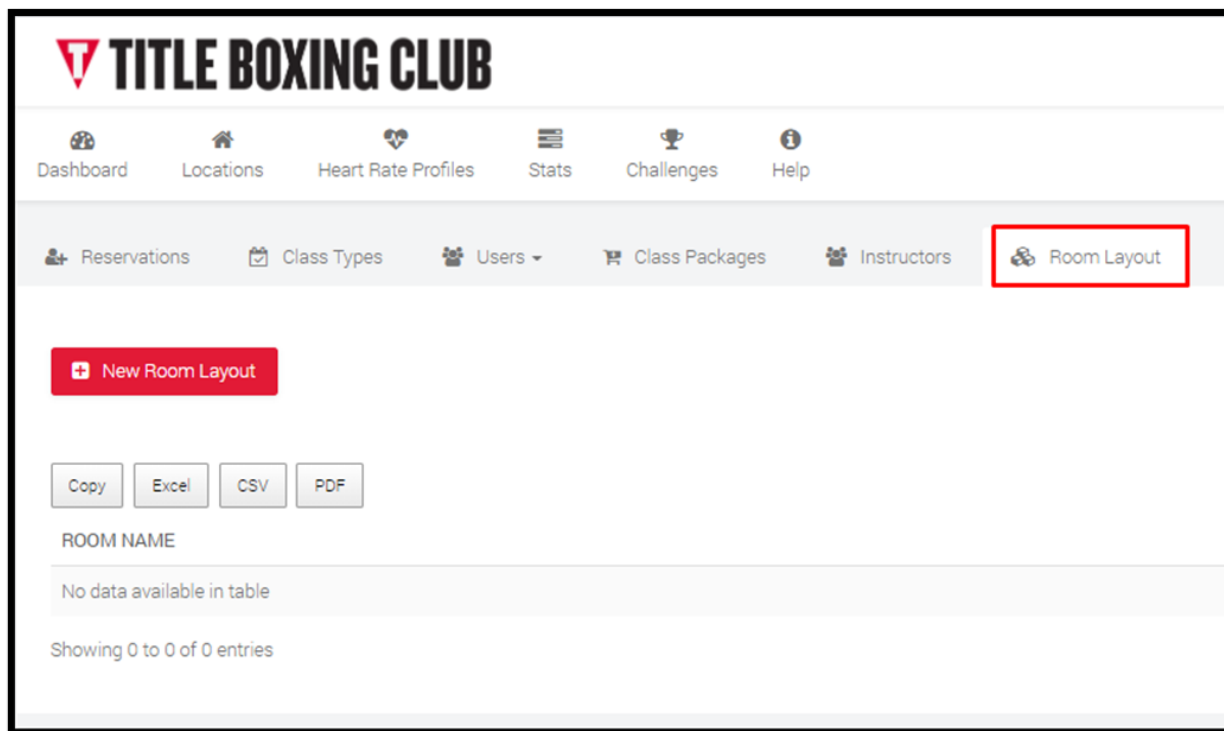
INSTRUCTOR NAME	EMAIL	WORK PHONE	PHONE	CLASSES URLS
Gm Test	test@titleboxingclub.com			View Url(s)
Melissa Clifford				View Url(s)
Sales Test	test@titleboxingclub.com			View Url(s)

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.

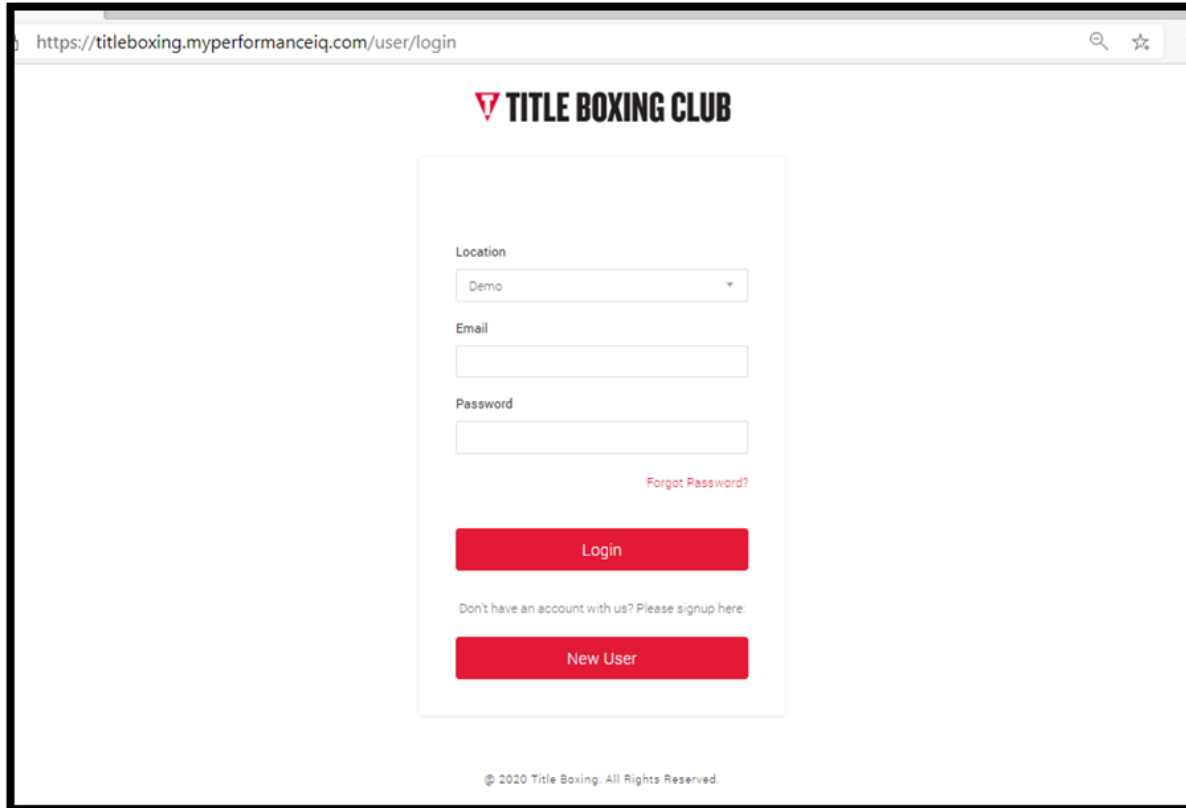
Ensure that the number of spots in the room layout is equal to the max attendee limit in the class type settings.

Creating A Room Layout:

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

Check-in Management

TITLE Boxing Club Check In Kiosk: Logging In



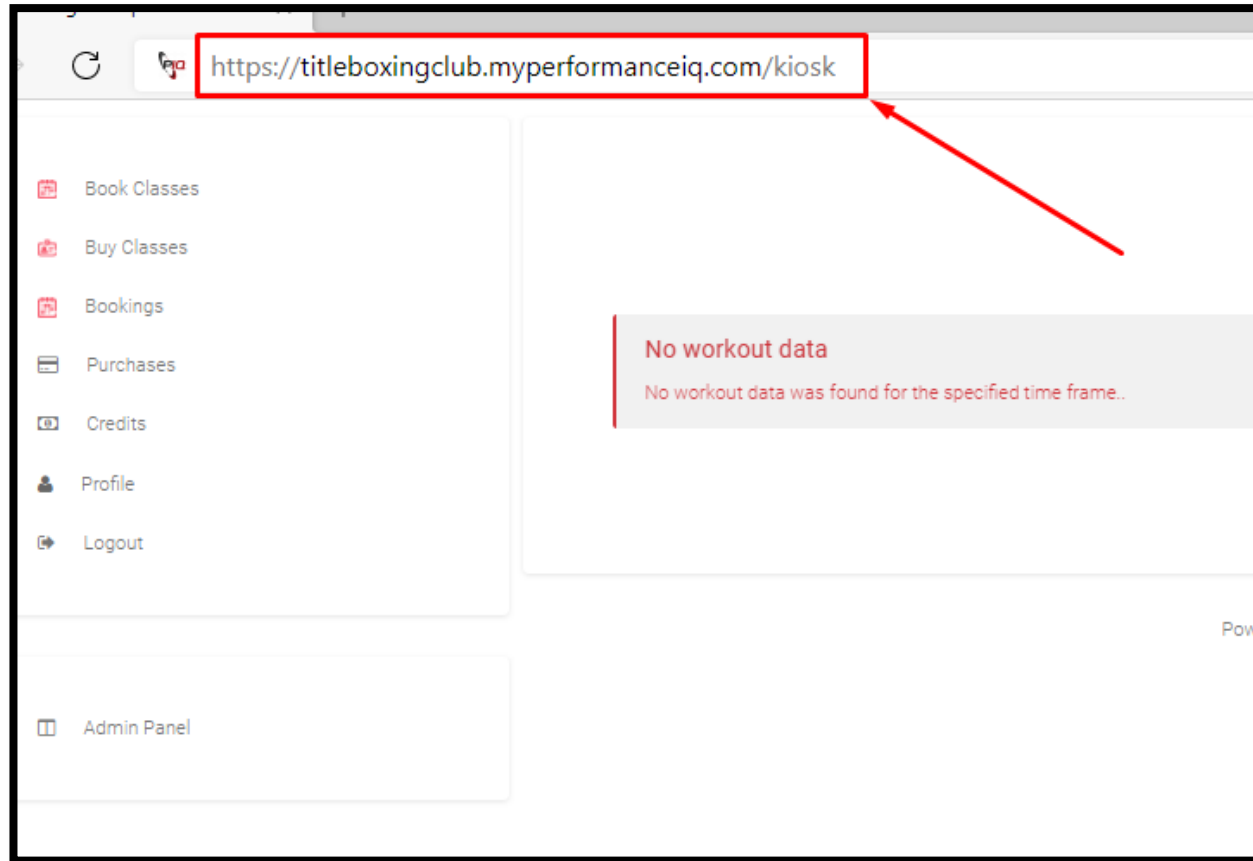
The screenshot shows a web browser window with the URL <https://titleboxing.myperformanceiq.com/user/login>. The page features the TITLE BOXING CLUB logo at the top. Below the logo is a login form with the following fields: a dropdown menu for 'Location' (currently showing 'Demo'), an 'Email' text input, and a 'Password' text input. A red 'Forgot Password?' link is positioned below the password field. At the bottom of the form are two red buttons: 'Login' and 'New User'. A link for users without an account is also present: 'Don't have an account with us? Please signup here:'. The footer of the page reads '© 2020 Title Boxing. All Rights Reserved.'

Use the login URL:

<https://titleboxing.myperformanceiq.com/user/login>

Each location will use their PIQ admin login credentials.

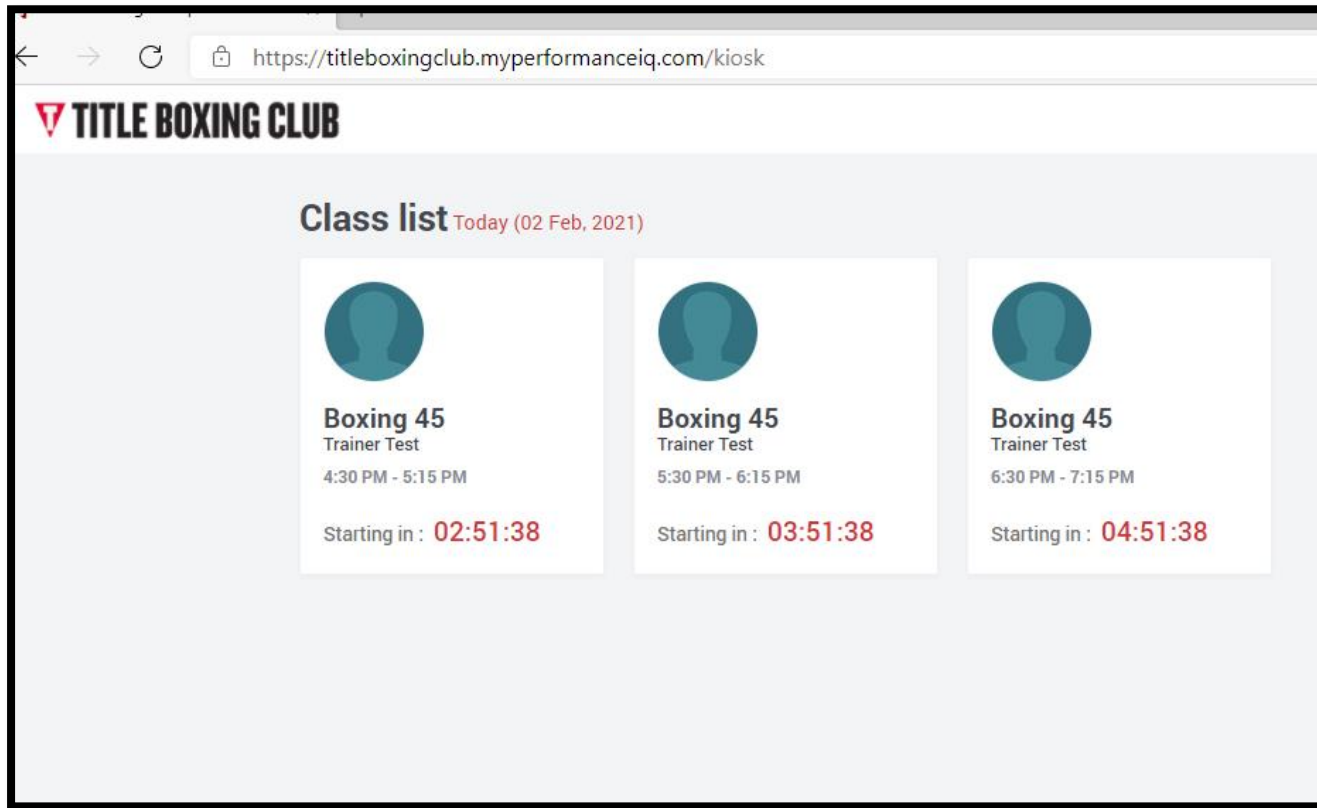
TITLE Boxing Club Check In Kiosk: Enter URL



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.

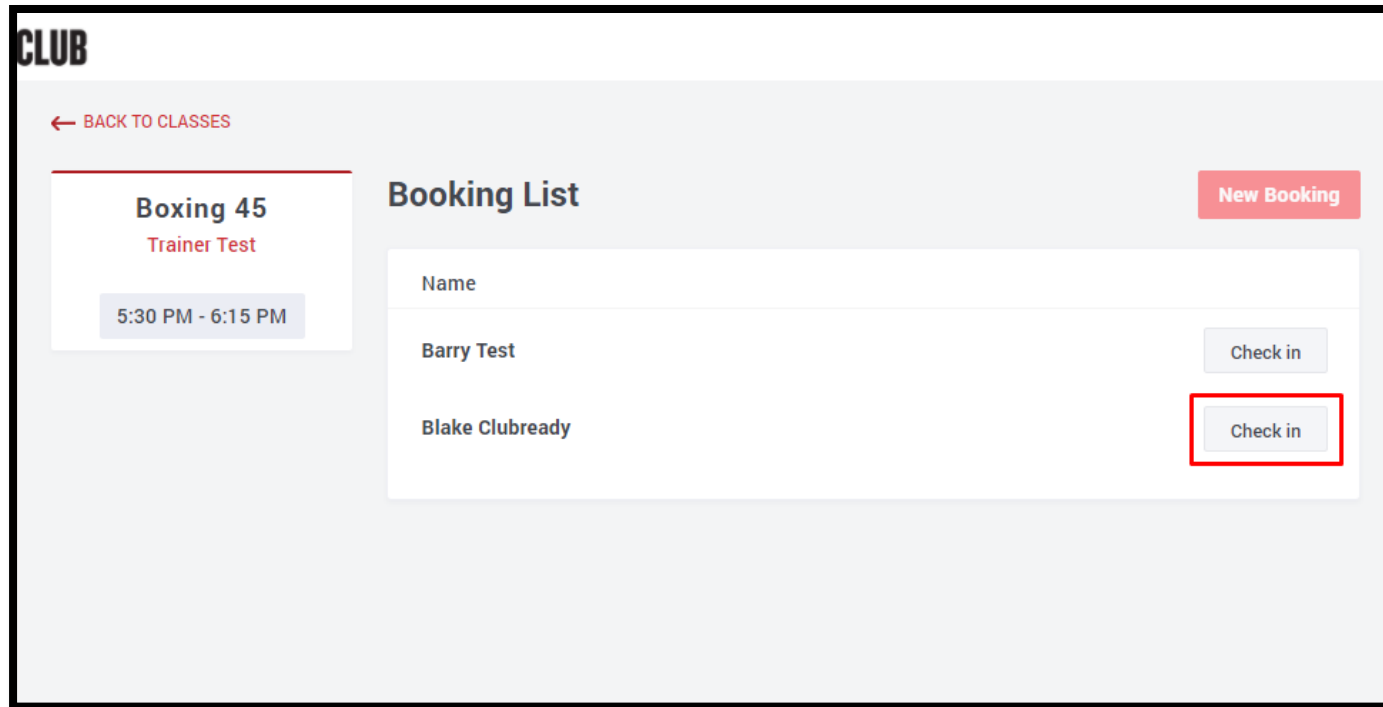
TITLE Boxing Club Check In Kiosk: Class List



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.

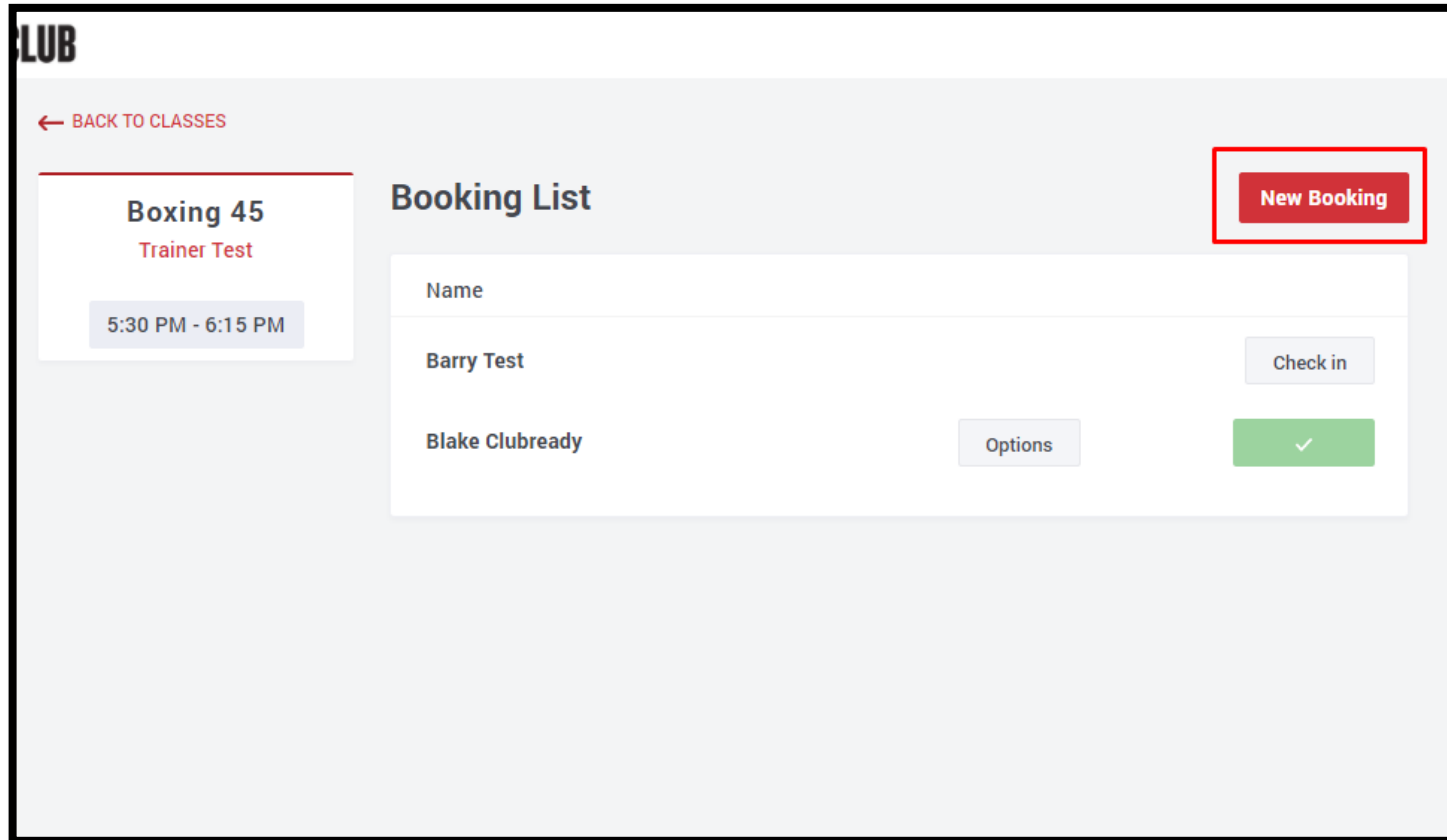
TITLE Boxing Club Check In Kiosk: Checking In



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



The screenshot shows a kiosk interface for the TITLE Boxing Club. At the top left, there is a red arrow pointing left with the text '← BACK TO CLASSES'. Below this, on the left side, is a box for 'Boxing 45' with 'Trainer Test' underneath and a time slot '5:30 PM - 6:15 PM' in a light blue box. To the right of this is a 'Booking List' section. At the top right of the booking list area is a red button labeled 'New Booking', which is highlighted with a red rectangle. Below the 'New Booking' button is a table with two rows of names: 'Barry Test' and 'Blake Clubready'. To the right of 'Barry Test' is a 'Check in' button. To the right of 'Blake Clubready' is an 'Options' button and a green button with a white checkmark.

Name	Options
Barry Test	Check in
Blake Clubready	Options

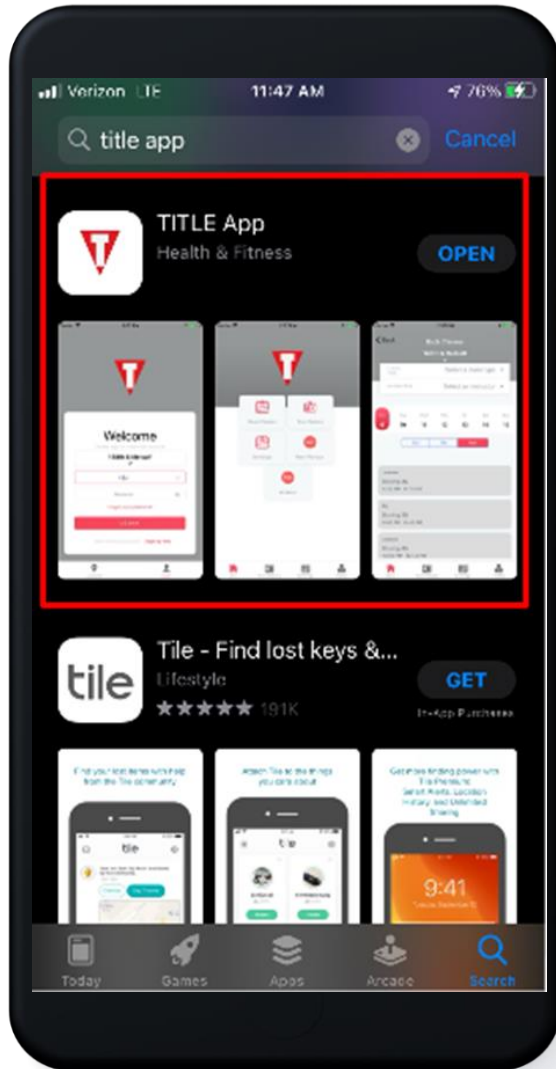
A new booking can be added through the kiosk by selecting the 'New Booking' button.

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.

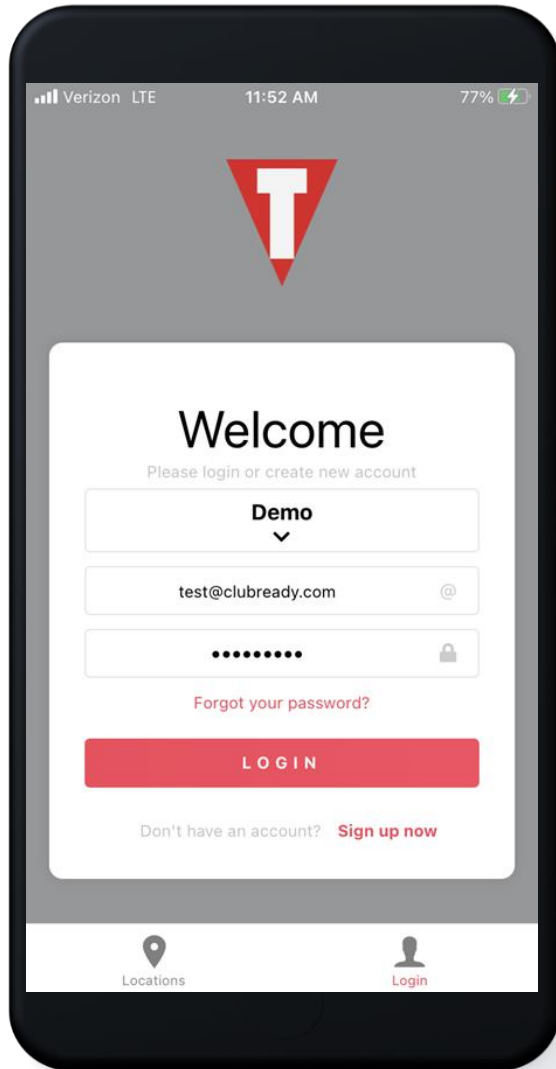
Member App

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.

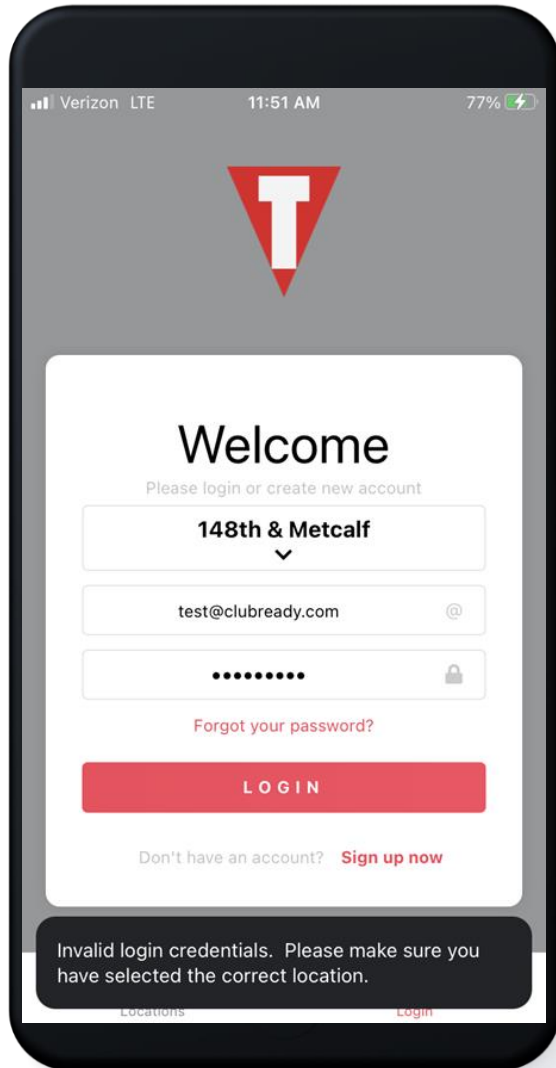
NOTE: The user will not use their ClubReady username.

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):

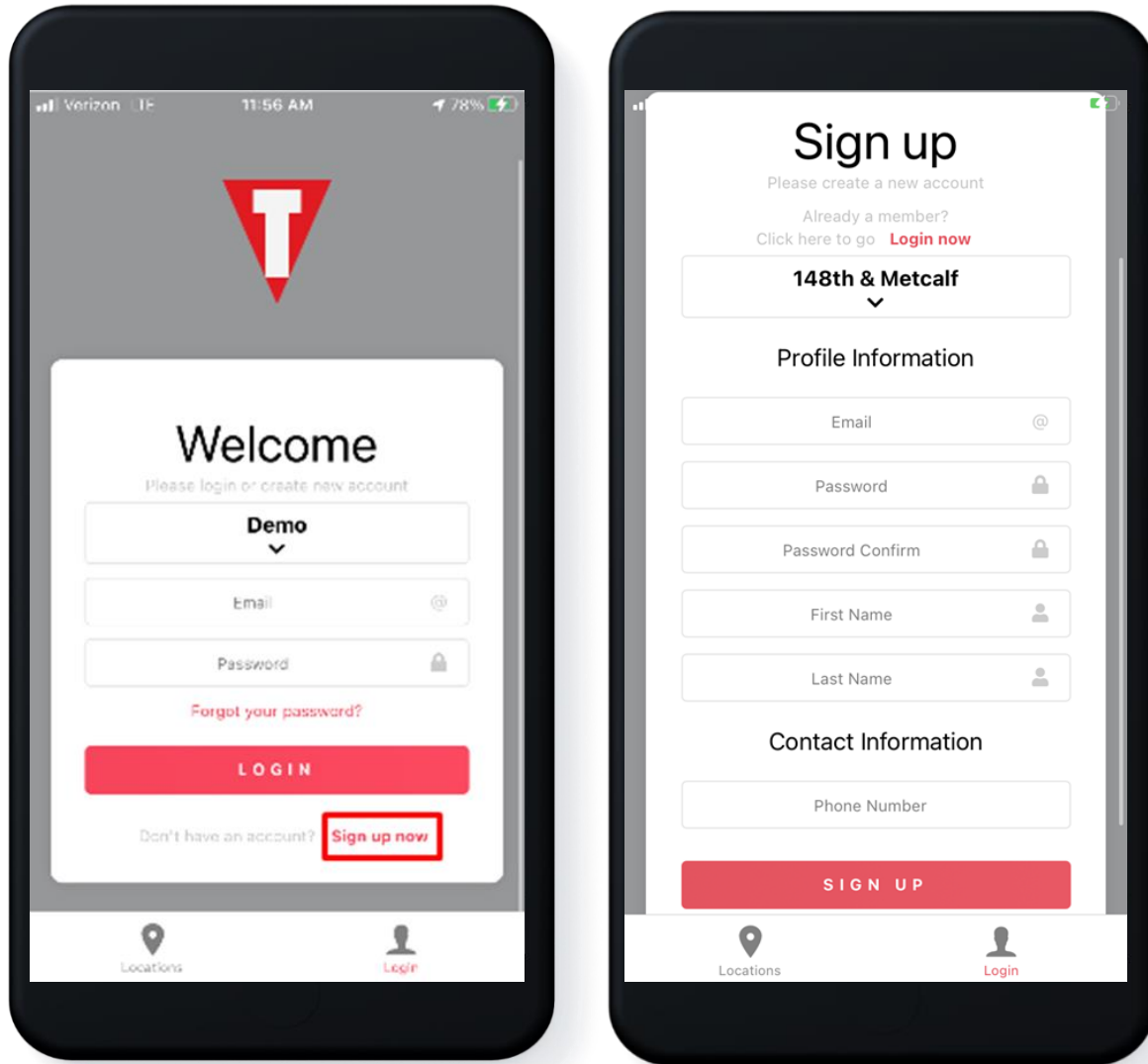
<https://www.clubready.com/wiki/WK26067540987>

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

Delete A Member / Customer / Prospect:

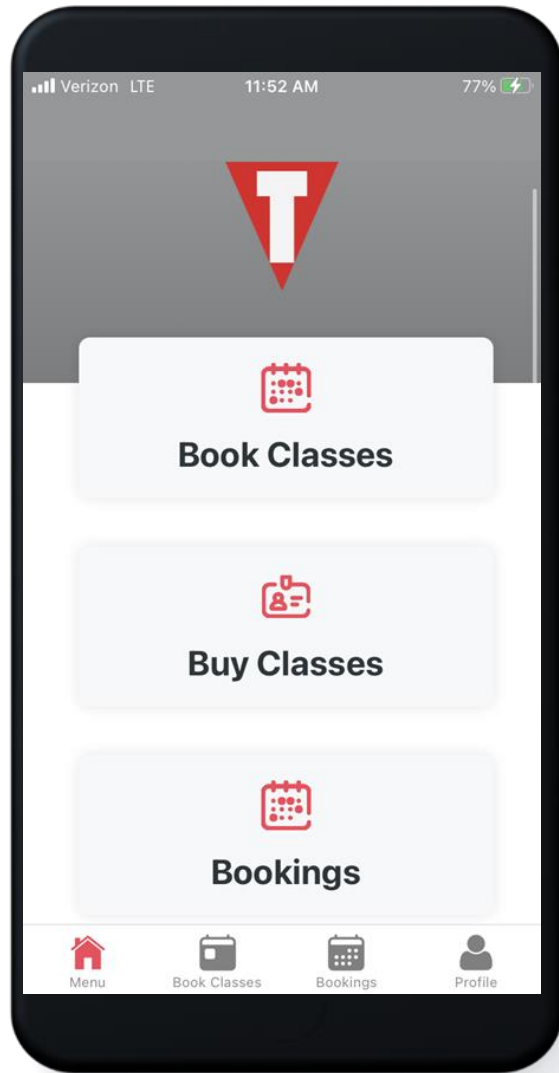
<https://www.clubready.com/wiki/WK18327804136>

TITLE Boxing Club Member App: New User Sign Up



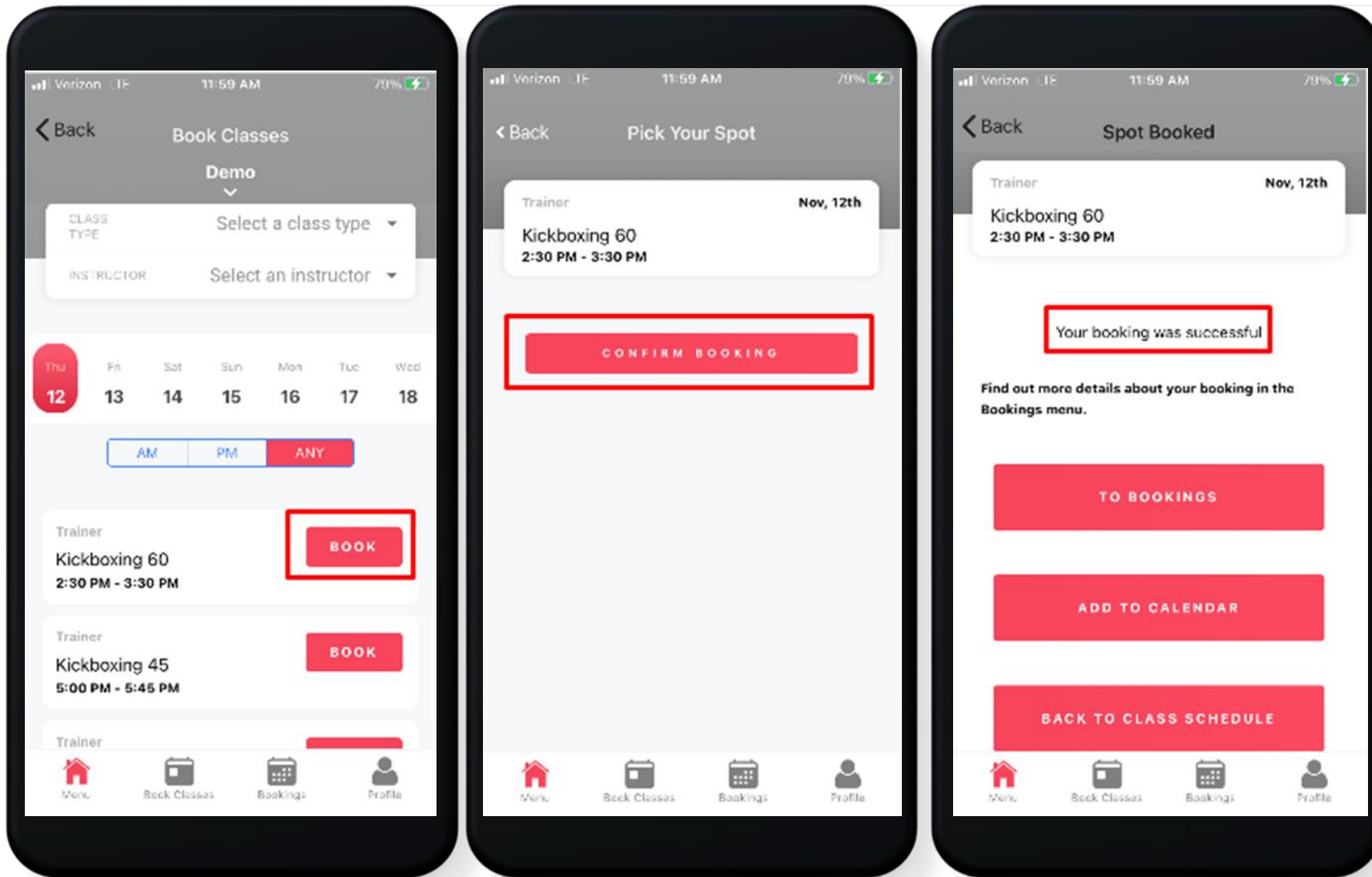
If it is a new user, they can click the 'Sign Up' link to create a new account.

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

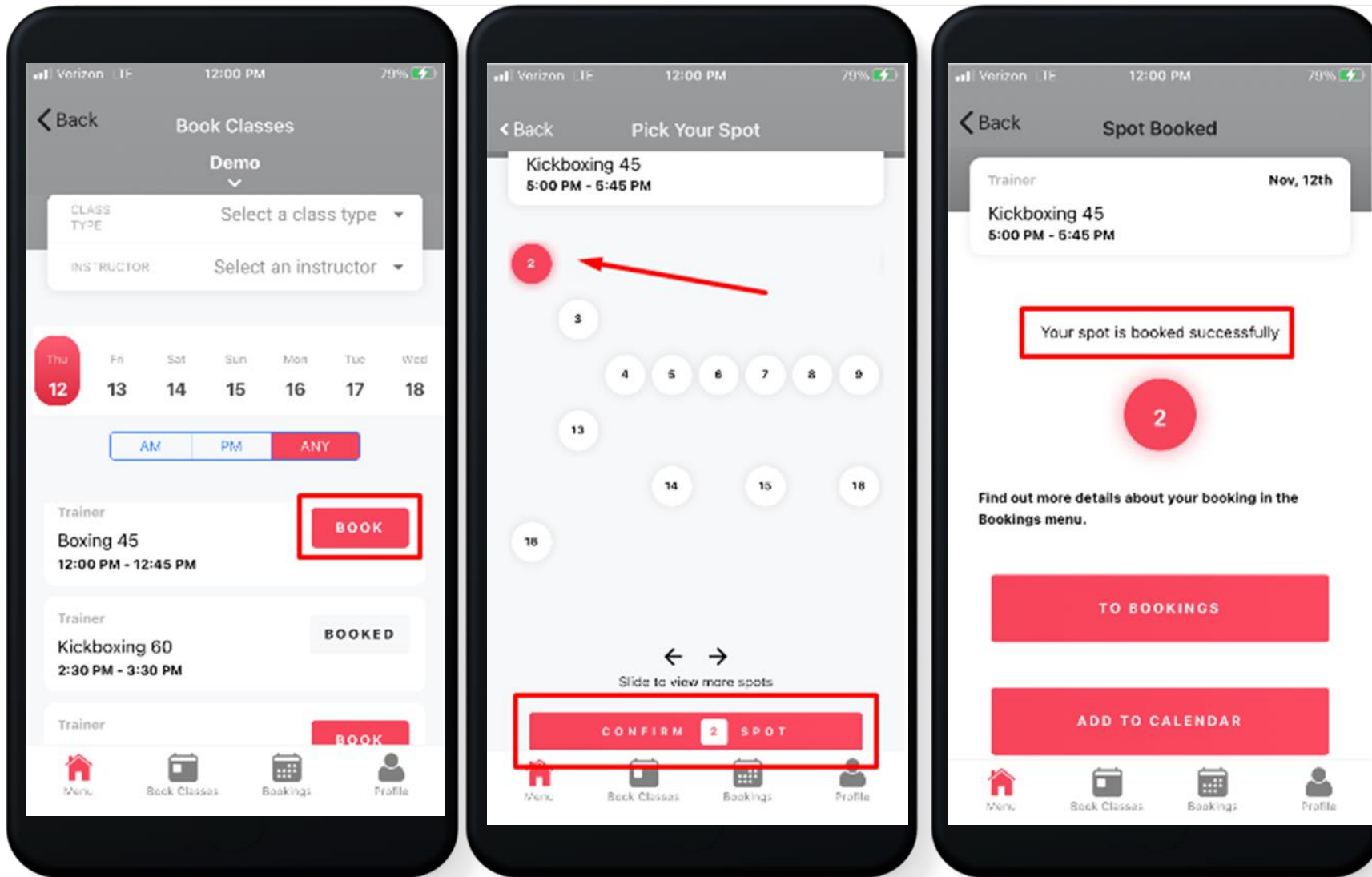


Select the preferred date and click **BOOK** next to the desired class.

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.

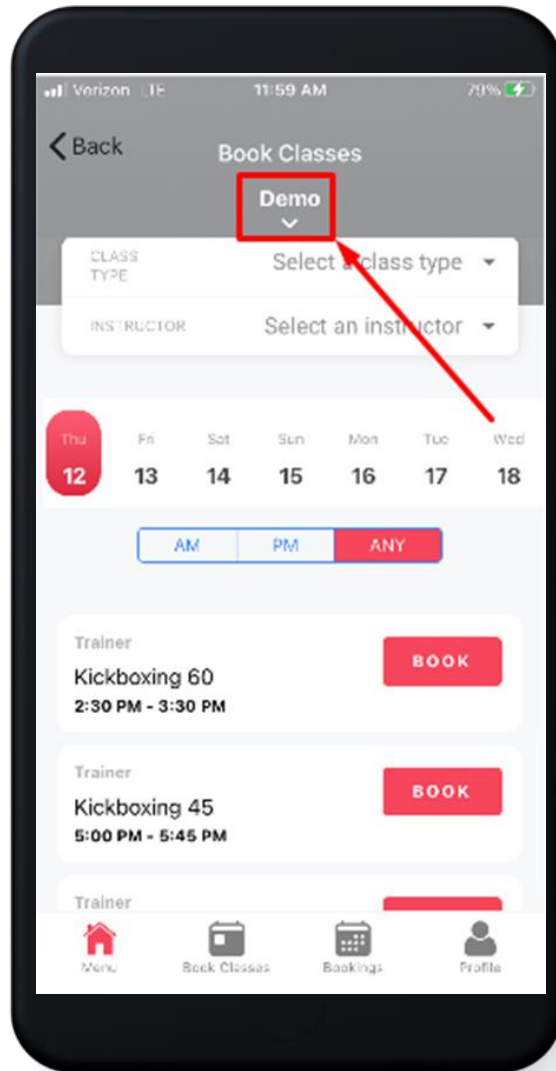
Once confirmed, the user will receive a successful message and their spot number.

Their spot number will also be listed in the bookings.

Create A Room Layout:

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

TITLE Boxing Club Member App: Cross-Club Book

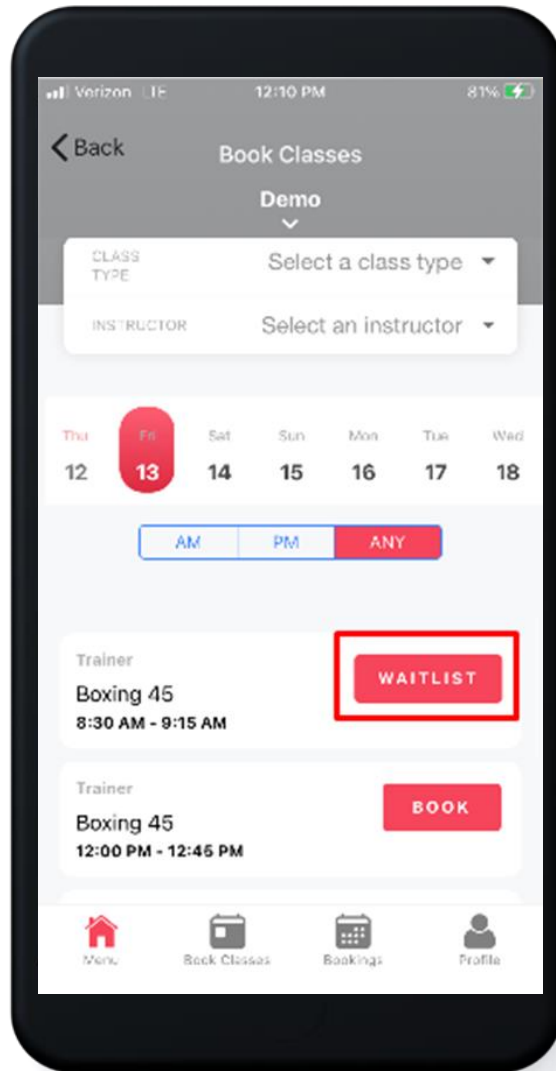


If cross-club bookings have been set up between multiple clubs, the user can navigate to the other location(s) class schedule to book a class.

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

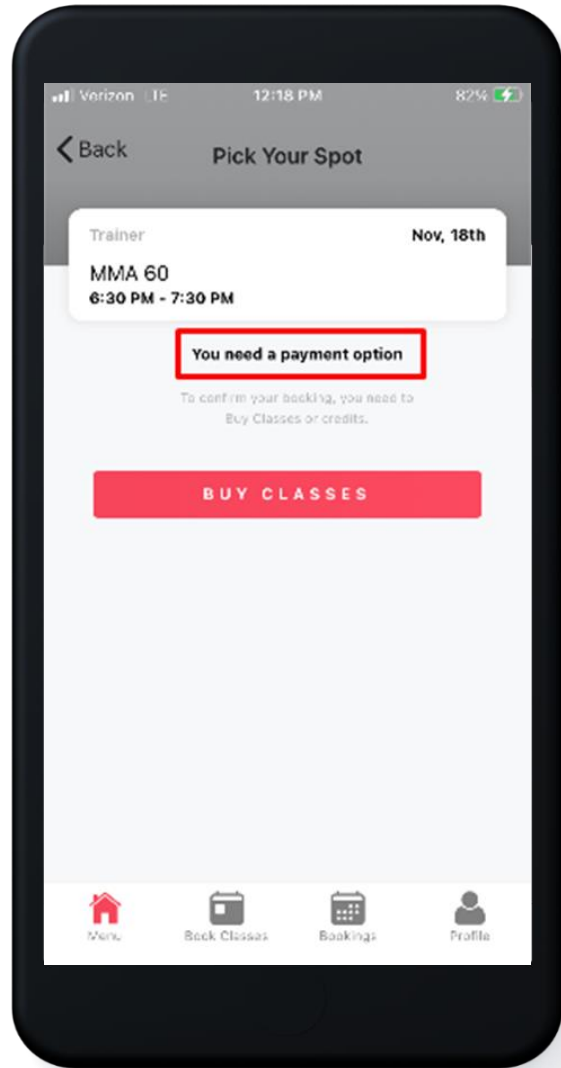
NOTE: Cross-club booking between locations will initially need to be set up at the Corporate level (if applicable). Once setup, ensure that the cross-club booking feature is enabled for the class type.

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.

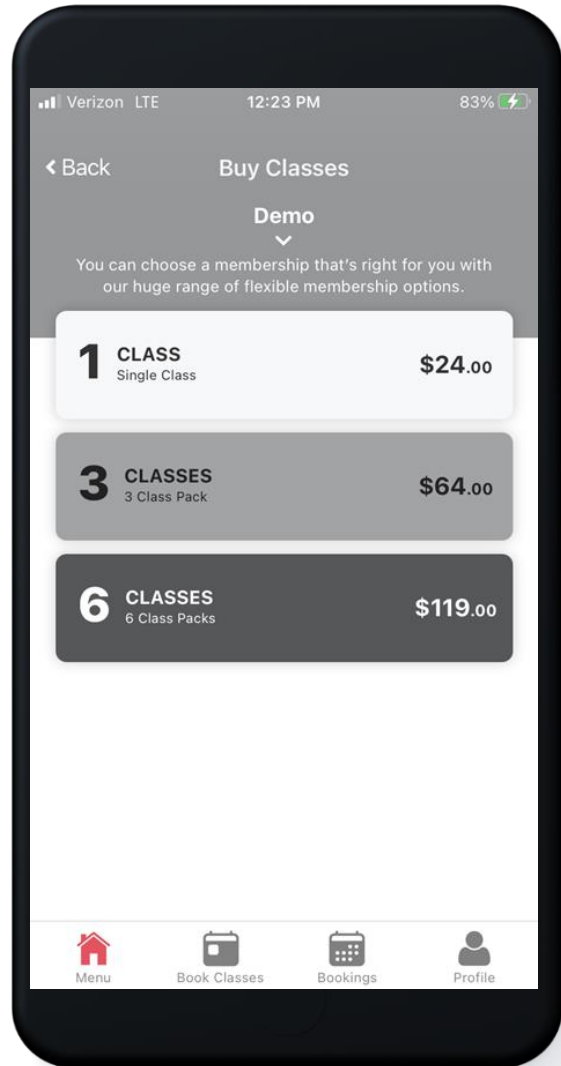
Creating a Booking Policy: <https://www.clubready.com/wiki/WK2339967002>

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.

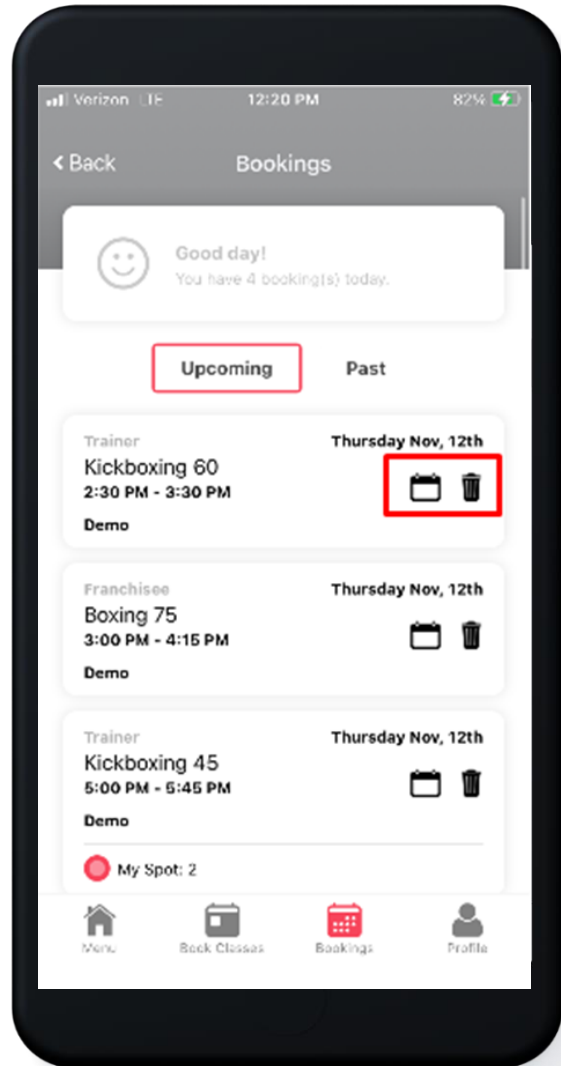
TITLE Boxing Club Member App: Buy Classes



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.

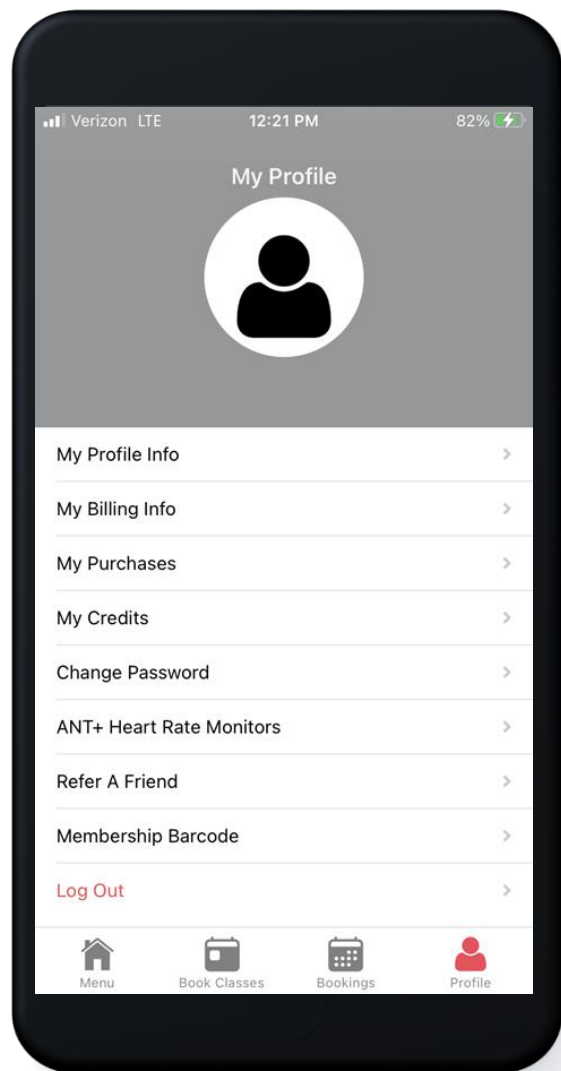
If a user booked a particular spot number, this would show under the booking.

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).

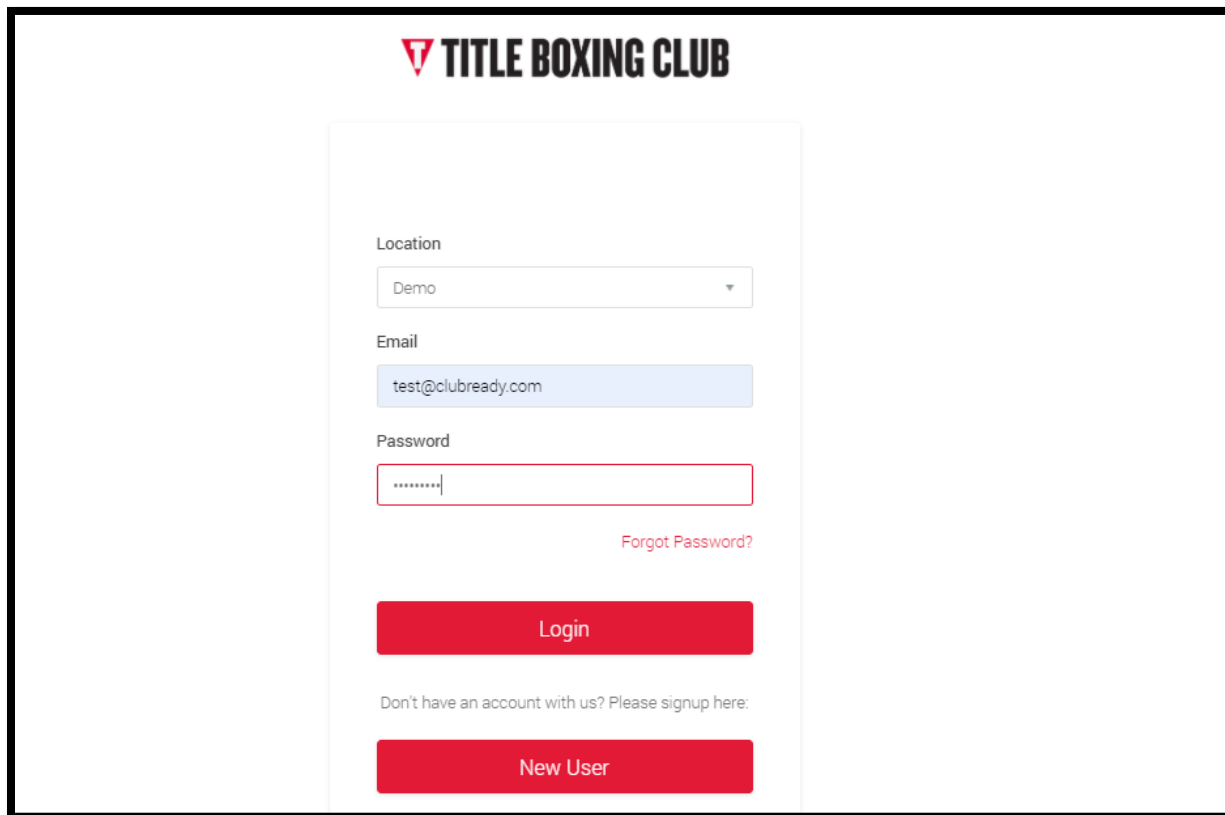
TITLE Boxing Club Member App: Profile



- 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



The screenshot shows the login interface for the TITLE Boxing Club Member Portal. At the top, the club's logo is displayed. Below it, the login form is centered and contains the following elements: a 'Location' dropdown menu with 'Demo' selected; an 'Email' text field containing 'test@clubready.com'; a 'Password' text field with masked characters; a red 'Forgot Password?' link; a red 'Login' button; and a link to the sign-up page. At the bottom of the form, there is a red 'New User' button.

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.

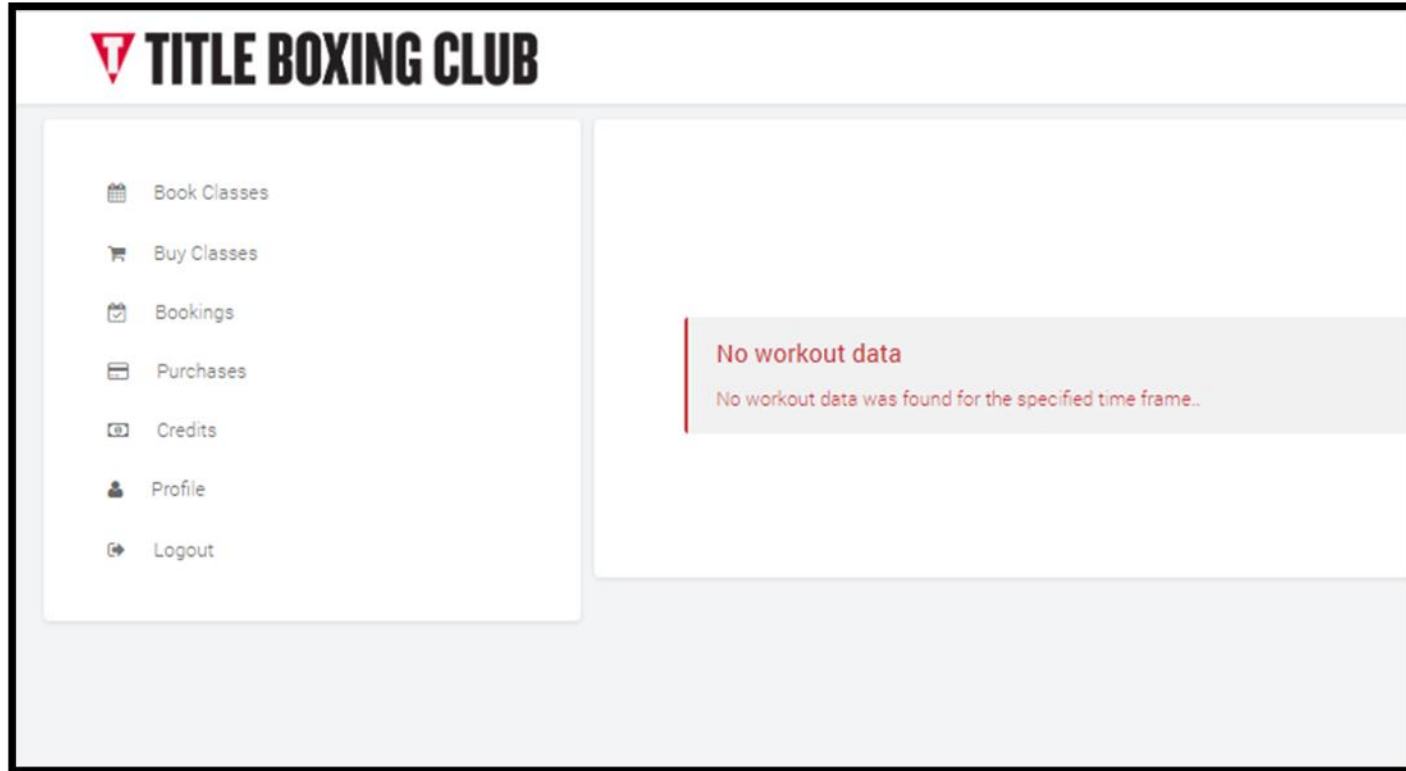
Staff can also reset the member's password on their ClubReady account.

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

TITLE BOXING CLUB						
Demo						
123 Jackson Avenue, Kansas City, MO 64123						
Phone: 555-555-5555 Get Directions						
class Location						
All Demo						
SUN 9.6	MON 9.7	TUE 9.8	WED 9.9	THU 9.10	FRI 9.11	
Boxing 60 Trainer 8:30 am 45 mins.	Boxing 45 Trainer 8:30 am 45 mins.	Boxing 45 Trainer 8:30 am 45 mins.	Boxing 45 Trainer 8:30 am 45 mins.	Boxing 45 Trainer 8:30 am 45 mins.	Boxing 45 Trainer 8:30 am 45 mins.	Boxing 45 Trainer 8:30 am 45 mins.
Boxing 45 Trainer 12:00 pm 45 mins.	Boxing 45 Trainer 12:00 pm 45 mins.	Boxing 45 Trainer 12:00 pm 45 mins.	Boxing 60 Trainer 9:30 am 60 mins.	Boxing 45 Trainer 12:00 pm 45 mins.	Boxing 45 Trainer 12:00 pm 45 mins.	Boxing 45 Trainer 12:00 pm 45 mins.
Boxing 45 Trainer 5:30 pm	Boxing 45 Trainer 5:30 pm	Boxing 45 Trainer 4:30 pm	Boxing 45 Trainer 12:00 pm	Kickboxing 45 Trainer 5:00 pm	Boxing 45 Trainer 5:30 pm	Boxing 45 Trainer 5:30 pm

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

Buy Packages

Location
Demo ▼

<p>Trial Class</p> <p>1 credit</p> <p>\$ 0.00</p> <p>→ Purchase</p>	<p>Single Class</p> <p>1 credit</p> <p>\$ 24.00</p> <p>→ Purchase</p>	<p>3 Class Pack</p> <p>3 credits</p> <p>\$ 64.00</p> <p>→ Purchase</p>
<p>6 Class Packs</p> <p>6 credits</p> <p>\$ 119.00</p>		

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

CopyExcelCSVPDF

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

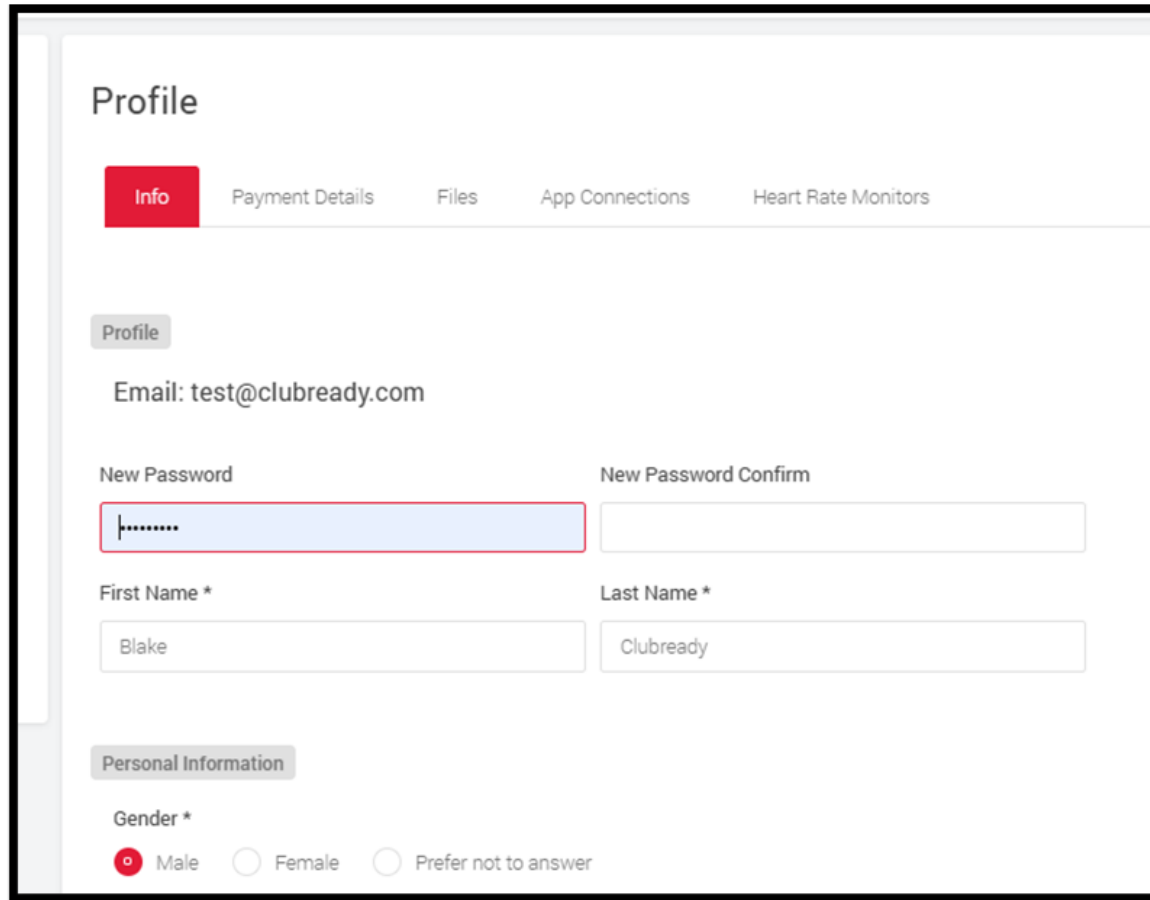
CopyExcelCSVPDF

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



The screenshot shows a web interface for a member's profile. At the top, there's a header with the title "Profile" and a navigation bar with tabs: "Info" (highlighted in red), "Payment Details", "Files", "App Connections", and "Heart Rate Monitors". Below the tabs, there's a "Profile" section with a button labeled "Profile". The main content area contains several form fields: "Email: test@clubready.com", "New Password" (with a red border and a red dot indicating a password field), "New Password Confirm", "First Name *" (with the value "Blake"), "Last Name *" (with the value "Clubready"), and "Personal Information" (with a button labeled "Personal Information"). At the bottom, there's a "Gender *" section with three radio buttons: "Male" (selected), "Female", and "Prefer not to answer".

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

Member Task Management

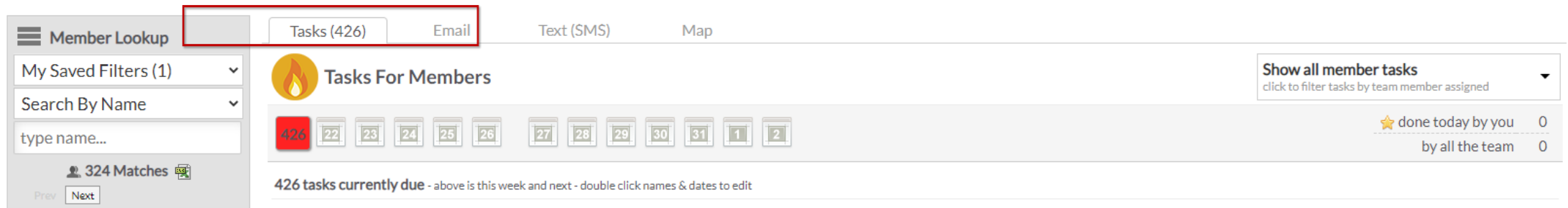
Working a Member Task (Past Due, etc..)

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.




The screenshot displays the 'Members > Tasks' interface. The 'Tasks (426)' tab is selected and highlighted with a red box. The interface shows a calendar view for the week of April 22nd to 28th, with 426 tasks currently due. A sidebar on the left shows 'Member Lookup' and 'My Saved Filters (1)'. A top right button says 'Show all member tasks'.

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

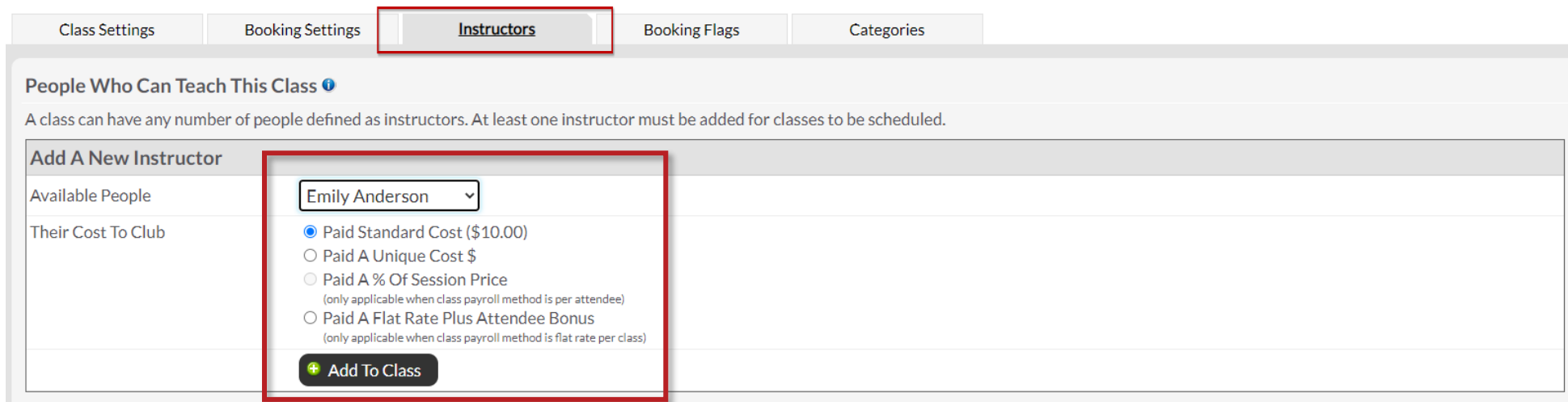
Emergency Contact Information

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.




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

People Who Can Teach This Class ⓘ

A class can have any number of people defined as instructors. At least one instructor must be added for classes to be scheduled.

Add A New Instructor

Available People	Emily Anderson ▼
Their Cost To Club	<p><input checked="" type="radio"/> Paid Standard Cost (\$10.00)</p> <p><input type="radio"/> Paid A Unique Cost \$</p> <p><input type="radio"/> Paid A % Of Session Price <small>(only applicable when class payroll method is per attendee)</small></p> <p><input type="radio"/> Paid A Flat Rate Plus Attendee Bonus <small>(only applicable when class payroll method is flat rate per class)</small></p> <p> Add To Class</p>

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 by clicking the “+” or “-” next to service.

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

What Services & Classes Can Hailey Perform? ⓘ

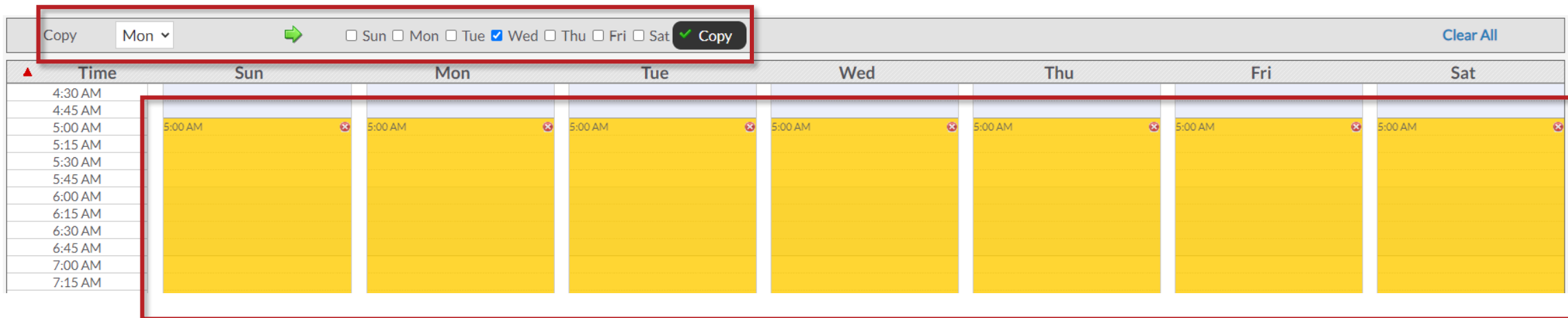
Available Services (5) - Can Provide (4)		Available Classes (10) - Can Teach (9)	
✓ Fitness Consultation 30min	-	✓ Boxing 30	-
✓ Fitness Consultation 60min	-	✓ Boxing 45	-
✓ Private Training 30min	-	✓ Boxing 60	-
✓ Private Training 60min	-	✓ Boxing 75	-
Appointment	+	✓ Kickboxing 30	-
		✓ Kickboxing 45	-
		✓ Kickboxing 60	-
		✓ Kickboxing 75	-
		MMA 60	+

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.



The screenshot displays the 'Weekly Availability' setup interface. At the top, there is a control bar with a 'Copy' button, a dropdown menu set to 'Mon', a green arrow icon, checkboxes for days of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat), and a 'Copy' button with a green checkmark. A 'Clear All' link is also present on the right. Below this is a grid with columns for each day of the week (Sun, Mon, Tue, Wed, Thu, Fri, Sat) and rows for time slots from 4:30 AM to 7:15 AM. The 5:00 AM slot is highlighted in yellow for all days, and each cell contains a small 'x' icon. A red box highlights the 'Copy' button and the 'Mon' dropdown in the control bar. Another red box highlights the entire grid area.

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

Admin Users Not Assigned (9)	Admin Users Assigned To This POS (0)
<div><div>Franchisee Test (Franchisee)</div><div>Sales Test (Sales)</div><div>Gm Test (General Manager)</div><div>Trainer Test (Trainers)</div><div>Mindstream Access (Master Admin)</div><div>Sarah Kalb (Master Admin)</div><div>Title Master (Master Admin)</div><div>Jaimie Knox (Master Admin)</div><div>Melissa Clifford (Franchisee)</div></div> <div><div>Add ></div></div>	<div>No employees have been added yet</div>

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

Administrative	
	Access Their Login Area
	Edit Profile
	Disciplinary History & Entry
	Time Clock Barcode
	Time Clock Pay Rate
	Door Access
	View Time Clock IN / OUT Log
	Add An Internal Note Related To This Staff Member
	List All Internal Notes Related To This Staff Member
	Edit Bio
	Add / Update Identification Photo

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 club's **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.



148TH & METCALF

Client Check In



Please Scan Your Barcode

– OR –

Type Your Barcode And Press Enter

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

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>



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!

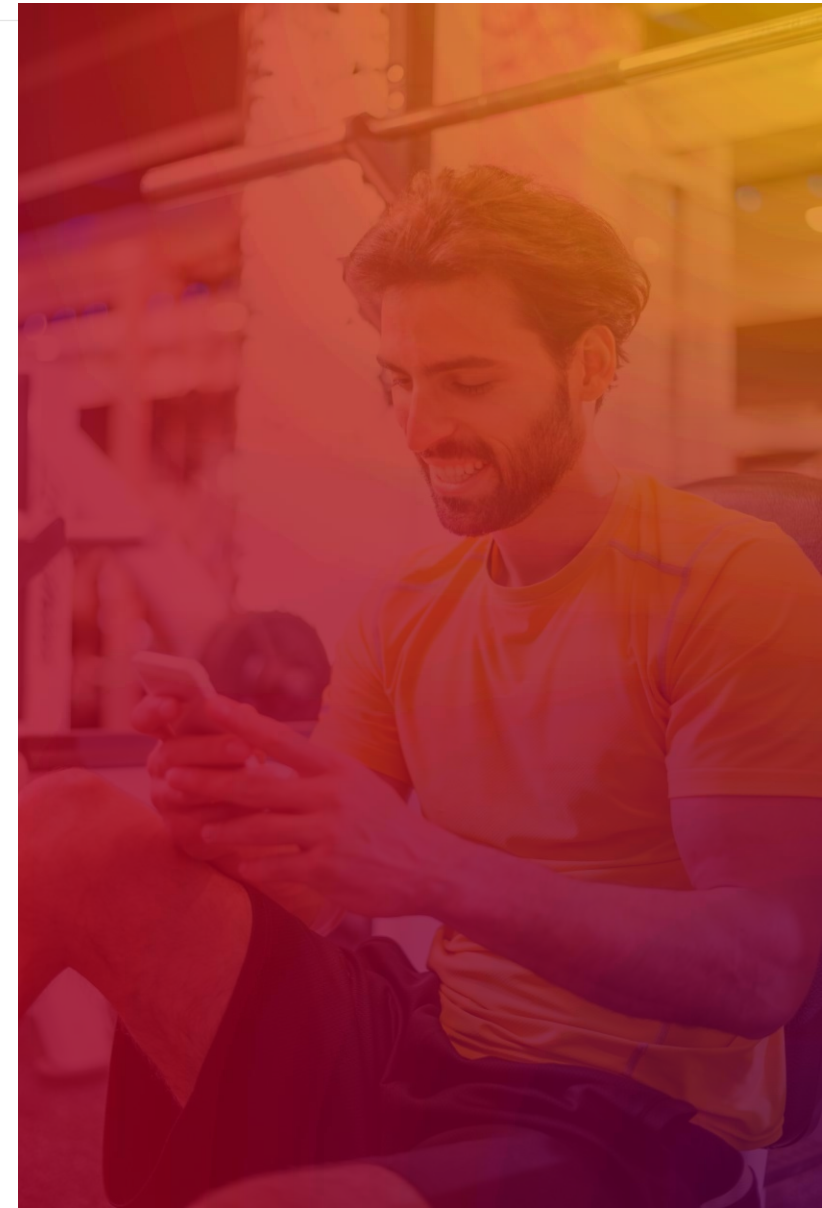
The following codes will automatically register you for the appropriate Foundations Learning Path:

- 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>

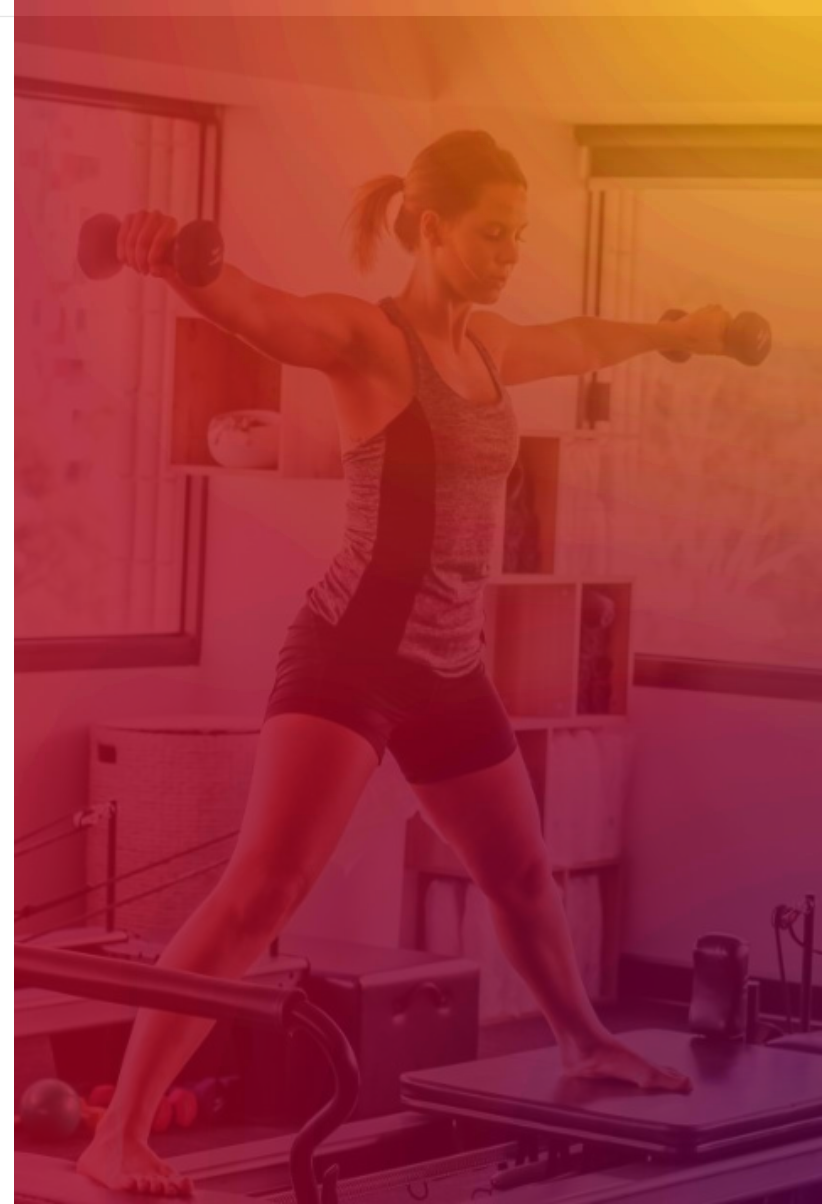
Each Learning Path is made up of several courses that train the user on using the ClubReady software. You can follow the Learning Path that has been constructed, or you can look at different courses based on your individual needs in the Course Library.



Training Home Page

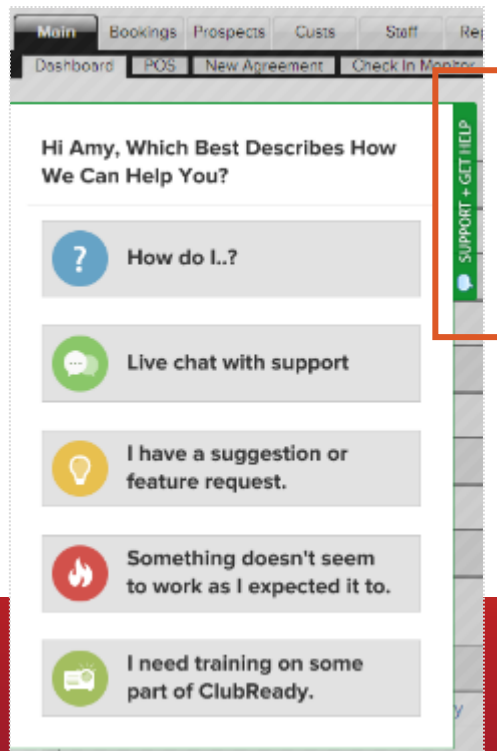
Locate all ClubReady resources in our customized Training Page from CRUniversity, User Guide, and On Demand Videos in a “one-stop” shop:

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

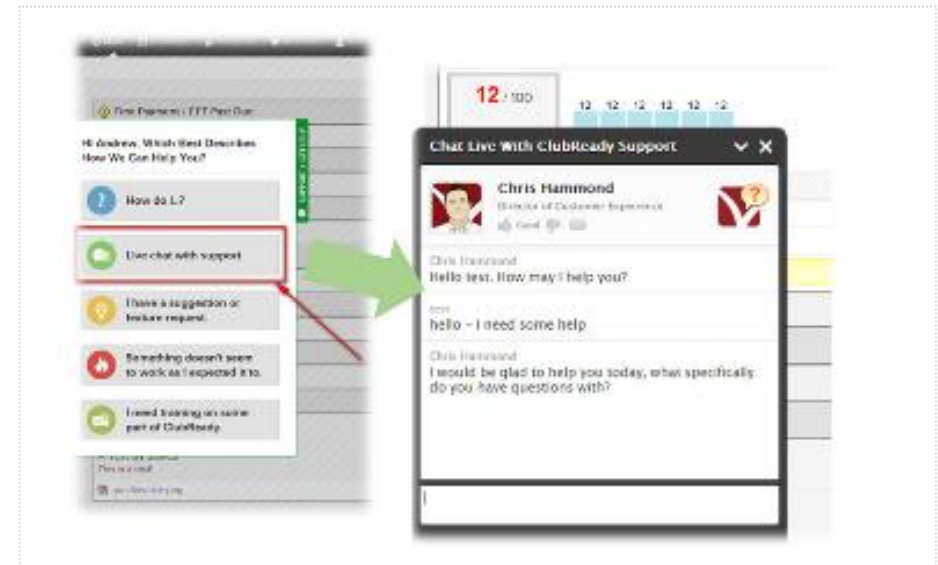


Support + Get Help

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

[Discuss](#) [Knowledge](#) [Training](#) [Network Status](#)



Review the training calendar below to find training webinars that you would like to attend. All times stated are Eastern Time. Click view can switch from list to calendar view using the icons far right.

If you do not find the subject matter you or your team needs [click here to request specific training](#) we will be happy to accomodate.

Filter By Staff Focus


 Search

Wednesday, August 12, 2020

10:00 AM EST	All Club Staff	
	ClubReady Foundations for Staff Members (Simulated)	view details 
	This class covers the basics of ClubReady for Staff, Trainers and Managers.	
	webinar URL	https://attendee.gotowebinar.com/rt/4935457410939114754 

Training: ClubReady Foundations Webinar

Learn > Training



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/>

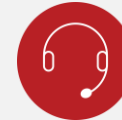
Need Help? Here's How to Get It



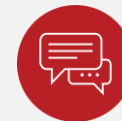
Submit a ticket



Post on the Help Forums



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



Use Live Chat



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