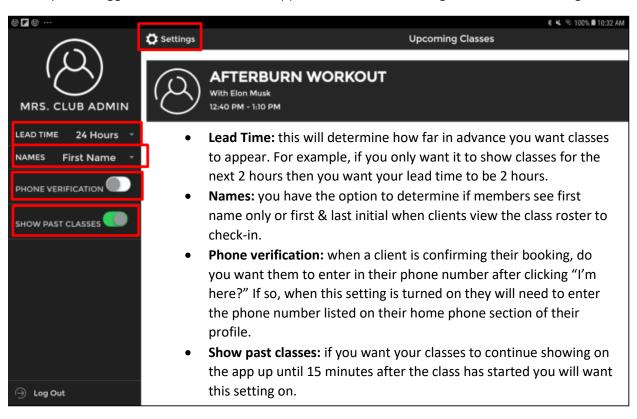
Using ClubReady for Fit Body Boot Camp

Member Check-in:

Members will check in with the ClubReady Class Kiosk application at the studio. The studio will have a tablet with the Class Kiosk App pulled up and facing members as they come into the studio. Members who previously booked into the class will be able to confirm their booking and members who haven't booked in yet will be able to book themselves into the class if space is available.

Once the application is downloaded staff will use their ClubReady username & password to login to the application. Please note that if your profile has access to multiple locations the application will pull the schedule of your profile's home club.

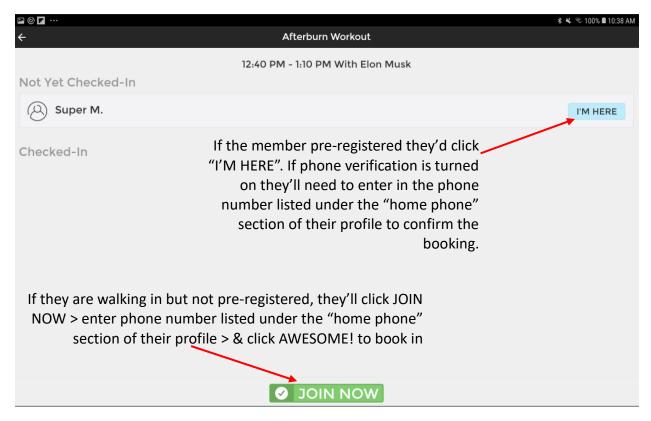
When you're logged in to the Class Kiosk App there are a few settings the club can manage:







The member will click on the class they're scheduled for or want to book into and will see this page:



Once they book in or click "I'm here" this will register a check in to the studio and will also mark them as a "show" into the class, logging off their booking.

In ClubReady, you will determine how far in advance a member can confirm their booking. This setting is located in the site under setup > scheduling > scheduling settings > when can bookings be logged off?:

When Can Bookings Be Logged Off?	Can log off 6 ▼ hours before booking start time
	Can log off Any • hours after booking end time

If "can log off ____ hours before booking start time" is set to 0 then that means bookings cannot be logged off before a class starts. This number will need to be 1 or more for members to be able to confirm their bookings before the class starts.

If you want more information on the Class Kiosk App, please refer to our Knowledge Base article:

https://www.clubready.com/wiki/WK30631316984

If you notice the application crashing or loading a white screen, please refer to this document on how to resolve the issue: https://www.clubready.com/wiki/WK34986756198





Sales Packages:

There Corporate level sales packages that clubs can use to sell agreements. Sales packages are located under setup > sales > sales packages. Some of the available sales packages are 3 Day Pass, 7 Day Trial, Unlimited Membership, Month to Month Membership & Paid in Full options. Please keep in mind that you will not be able to edit Corporate level sales packages.

Membership vs. Service Packages

There are different types of sales packages – membership & service packages. Membership packages are designed to affect a client's membership status (expiration date) when sold and is what classifies if someone is an active member. Service packages do not affect a client's membership since or expiration date and is designed for Trial packages.

Package Durations & Installments

Package durations in combination with installments will determine how often invoices will drop and for how long when this sales package is sold. Package duration is how often you would like invoices created. For example, if you would like invoices created every month you'd set the package duration to 1 month. If you an invoice to drop every 15 days, then the package duration should be 15 days. Installment plans are used to set the initial term of the package. The system will generate each installment based on the Package Duration entered under the package Settings tab. For example, if you have a 12-installment plan and a package duration of 1 month this will create an invoice every month for 12 months. If the package duration is set to 7 days and you have 52 installments, then an invoice will drop every 7 days for a year (52 weeks).

Service Package Example: 7 Day Trial

Settings

- O You will notice at the top of the package settings it says it's a Service Package. This means it will not add a membership since or expiration date to the client, so they will remain in the prospect tab.
- o Package duration is set to 7 days, which means the package will last for 7 days.
- o Monthly or Package Standard Price is set to \$0 so the client will not be charged.
- o Terms of Sales/Client Contract is the contract used when selling the agreement.
- Auto-renew evergreen? Is set to No so the contract will not renew after 7 days.
- Assign Prospect Type is set to 7 Day Trial, so when this package is sold the client's lead type will update to 7 Day Trial.

Installments

• There is only 1 installment for this package, which means only 1 invoice will drop when the package is sold.





Included

 This shows that when the package is sold 7 Afterburn Workout class credits will drop on the client's account. The client will use those session credits to book their 7 workouts.

Membership Package Example: Unlimited Membership

Settings

- You will notice at the top of the package settings it says it's a Membership Package. This means that when it's sold it will affect the client's membership since & expiration date.
- o **Package duration** is set to 1 month, so this package will bill monthly for the client.
- o **Monthly or Package Standard Price** is the standard price of the package, but the invoice price will depend on the price set on the installment.
- o Sales Tax Schedule lets you select what sales tax schedule this package should follow when it's sold (if your state has you tax on membership packages).
- o **Terms of Sale/Client Contract** is for you to select which contract should be used when this package is sold. This portion is managed by the club and is up to them to select which contract should be used.
- Auto-Renew Evergreen? Is set to Yes and will auto renew into the same package.
 This means that after the installments of the package has completed the package will continue in monthly durations until the agreement is cancelled.
- o **Membership Type** is set to Month to Month. This will automatically drop on the member's account when this package is sold and is what will allow a member to book their unlimited classes.

Installments

- o You will notice that there are three different installment options: 6-months, 12-months and 18-months. During write up, staff will be able to pick which installment the member wants. If 6-months is selected that means 6 invoices will drop on the client's agreement and the invoice due dates will separate in monthly durations (since our package duration is set to 1 month). After the 6 monthly invoices, the package will go into auto-renew at a month to month duration until the agreement is cancelled.
 - Regarding membership since & expiration date with this package, the since date will be the date the package was sold. The expiration date will be 6 months after the package is sold (if 6-month installment is selected). If that package goes into auto renew then the expiration date will extend in monthly durations, once each monthly invoice is paid, until the agreement is cancelled.
- o Installment price is set to \$147 so each invoice that drops will be \$147.
- o There are not any setup fees associated with any installments on this package.





- o For each of these installments, the online signup URL is enabled. You can share this link with client's if they want to purchase the package online. Depending on which installment option they want determines which link you will want to provide to them.
 - On each online signup URL you will want to click the edit pencil and select which contract you want to be used when this is sold.

Membership Package Example: 12 Month Paid in Full

Settings

- o For this package, you'll notice that the **package duration** is set to 12 months. Since the client is paying for a full year upfront, they don't need monthly invoices
- o The Monthly or Package Standard Price is set to \$1,470.00
- o Sales Tax Schedule lets you select what sales tax schedule this package should follow when it's sold (if your state has you tax on membership packages).
- Terms of Sale/Client Contract is for you to select which contract should be used when this package is sold. This portion is managed by the club and is up to them to select which contract should be used.
- Auto-Renew Evergreen is set to No. After the 12 months, the agreement will end and will not auto-renew. The client will want to purchase a new package after the 12 months.
- o **Membership Type** selected is Paid In Full and is what will allow the client to book their unlimited classes.

Installments

- o There is only 1 installment on this package. Since the package duration is 12 months and there is only 1 installment, this means that at the time of sale one invoice will drop and it will be the price of the installment price setup (\$1,470).
 - Regarding membership since and expiration, the since date will be the date the agreement was sold, and the expiration date will be 12 months after the agreement is sold. The membership expiration date will not update after the 12 months unless they purchase a new membership package.
- o No setup fees are associated with this package.
- o There is an online URL if the client wants to purchase this package online
 - On each online signup URL you will want to click the edit pencil and select which contract you want to be used when this is sold.

If you would like more information on sales packages, please refer to our Complete Guide to Sales Packages: https://www.clubready.com/wiki/WK32644566504





Selling Agreements

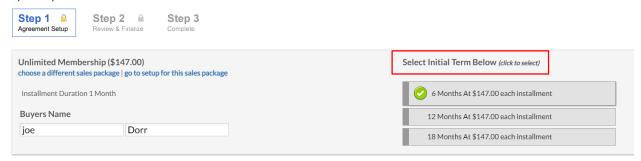
There are a few different ways that agreements can be sold to clients.

- Staff selling agreements under Main > New Agreements
- Clients purchasing packages through online URL's
- Clients purchasing packages through their Wellness Portal

Selling Agreements in Club

If a staff member is going to sell a client a package in the club they will navigate to Main > New Agreement > search & select their client > confirm their details before proceeding to packages > select the package folder the sales package is located under > select the package the client wants to purchase > and this will take you to Step 1 of the agreement write up.

If the package has more than one installment, staff will select which installment the client wants to purchase (the installment list goes in numerical order and will default to the first installment option).



After selecting the installment, you will see the list of invoices that will drop on the agreement. The first invoice will default to "Down", saying that this is the invoice that will be paid today and will have today's due date. Since I selected the 6-installment option 6 invoices dropped in monthly durations due to how the sales package is setup. You will also see that the package is going to auto-renew at the same price after the 6 months:



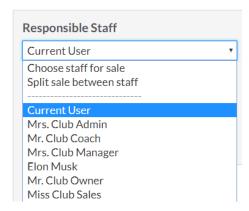




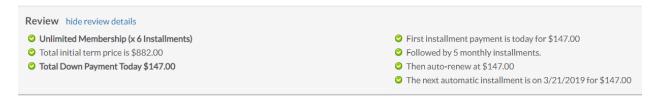
We will then see the sub total of what the member owes today.

Total Due Today ♥	\$147.00
Account Credit Balance	\$0.00
Sales Tax	\$0.00
Subtotal	\$147.00
Amenity Total Today	\$0.00
Amenity Term Total	\$0.00
Term Amount Paid Today	\$147.00
Term Total Price	\$882.00

Responsible staff will be the person that sold this agreement – if the club has commission tiers setup then it will be commissioning the person selected under Responsible Staff. This section will default to the person logged in but if that needs to be changed or the sale needs to be split click on the drop down to select the new staff member or click "split sale between staff" to then have the option to select two staff members.



After proceeding to Step 2 of agreement write up you will notice a Review section that will go over the details of the agreement the client is about to purchase:



If the sales package has a contract selected that requires signatures the next step will for the client to sign their new agreement. On this example, the only way a signature can be taken is On-screen (or with a mouse) but if you wanted to change the signature option the club can do this setting is under setup > sales > sales settings > new agreements > electronic signature settings.





When signing an agreement there are two options: unsigned agreement in gray or quick sign in red:



The unsigned option will display the contract, so the client can read & review the contract when signing. If the client just wants to sign and doesn't want to read & review the contract, then click on the red "click here to only take signatures" box to only take signatures and no display the contract.

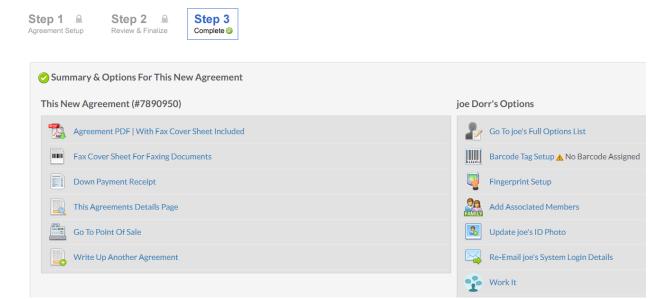
The final step is to select the client's payment option – how they will be paying for the agreement. In our example, the available payment options are At POS, Card, Check, Cash or Other Member.

- At POS allows the agreement to be sold without taking payment at the time of sale. This should be used if the customer would like to purchase an agreement but also wants to purchase a clothing item and have it run under the same transaction. If At POS is selected and the agreement is finalized the staff will navigate to the POS and search & select the client > their first due invoice will populate in the cart and the staff can select any other items the client would like to purchase and continue checking them out.
- Card once you click on the card option the amount due will populate and you can select to swipe the card if you have credit card swipe, enter if you want to manually enter in their card information, or if the client already has a card on file there will be an "on file" option to select.
- Check will be used if the client physically writes you a check for their payment. If this is selected, the system will prompt you to add a card on file to collect future payments. If you have the permissions, you can click "skip" to not add card information.
- Cash will be used if the client is physically giving you cash for their payment. If this is selected, the system will prompt you to add a card on file to collect future payments. If you have the permissions, you can click "skip" to not add card information.
- Other member will be used if they have another user selected in their payment details on file that has agreed to pay for the agreement.





After payment is selected staff will click "Finalize Agreement" and once this happens the agreement has been sold! The system will take you to Step 3 where you can quickly access their full details, WorkIt or Go To Point of Sale.

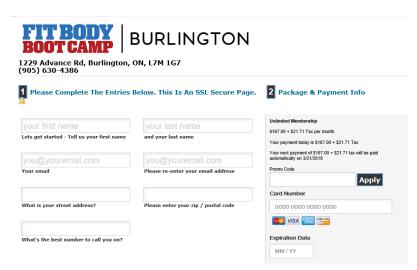


If you'd like to watch a video on how to sell a membership agreement, click here: https://www.clubready.com/wiki/WK29598460031

If you'd like to watch a video on how to sell a paid in full agreement click here: https://www.clubready.com/wiki/WK34166107729

Online URL Agreement Sales

Under setup > sales > sales packages > select the sales package > installments > If the package is enabled for online sale a URL will appear. You can send this URL to your client, so they can purchase an agreement anywhere they have internet access. When they use this URL their page will look like this:

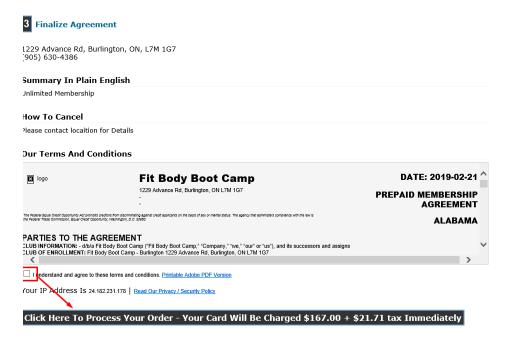






The client will enter in their first & last name, their email, their address, their phone number and then to the right they'll see how much they'll pay today, when their next payment is due and for how much. They will be able to enter in a Promo Code if they have a valid one and their card information.

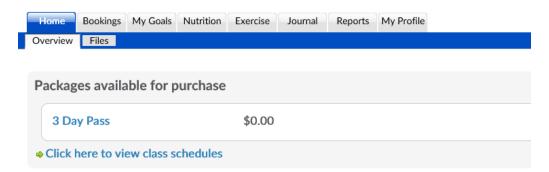
If the sales package has a contract selected it will appear at the bottom of the page for the client to read & review. They will click the box saying they understand the terms (this will be their signature) and then they will click "click here to process your order".



Wellness Portal Purchases

The only Corporate level package that is available to be purchased through the Wellness Portal is the 3 Day Pass. This package is setup to only be sold to non-members, so it will only show if a prospect is logged in and will not show if a member is logged in. A prospect also won't be able to purchase this if they've already purchased this package before.

When the prospect is logged into their Wellness Portal their page will look like this:



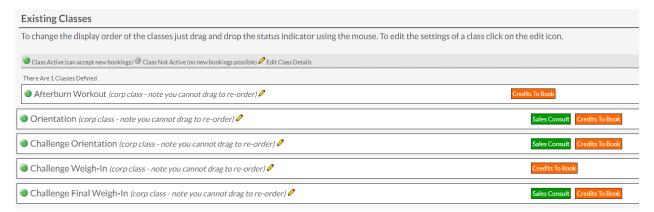




Once they click 3 Day Pass it will take them to that online signup page. The information that they already have on file (their name, email, etc) will auto populate > they'll enter in their card information (it will stay on file but will not charge them) > they will select that they understand the terms & conditions > and finalize the agreement.

Classes

Corporate has classes already created and available to be used at the studios:



Afterburn Workout is the class that will used the most as this is your daily workout class. If you click the edit pencil on that class > bookings settings > you can see how the class is currently setup.

Booking Settings

Attendees Must Booking A Place In Class is set to Yes – this means clients need to be booked into the class in order to prevent overbooking and to prevent prospects from showing up when they shouldn't be able to.

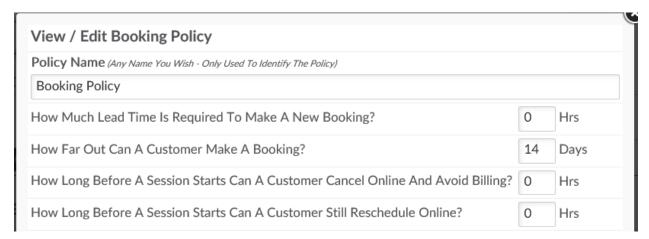
Max Attendees Per Class can be changed by the club as each studio space has a different number of clients that can be enrolled in one class.

Allow Customer Wait List For this Class is set to Yes — this means if the max attendee limit for the class has been met, clients will have the option to book themselves onto the wait list. Underneath, it says "Lead Time Required For Wait List Bookings 2 Hours". This means that if it's more than 2 hours before the class starts the first person on the wait list will automatically be moved into the class if someone cancels out of the class. If it's less than 2 hours before the class starts and someone cancels, no one will be automatically moved from the wait list into the class.





Booking Policy will default to the Corporate policy called "Booking Policy". Here is how that policy is currently setup:



Class Credit Required means that a credit will need to be used for the customer to make a booking. Underneath that setting is "Certain Membership Types Don't Need Class Credits". This means that if a customer has one of this membership types, and is an active member, they will be able to book into that class without needing a class credit:



Instructors

This tab will be used to determine how a staff member gets paid when they teach the class. For their name to appear here they will need to be enabled for scheduling under setup > scheduling > staff schedule > and the class will need to be selected saying they're able to teach this class.

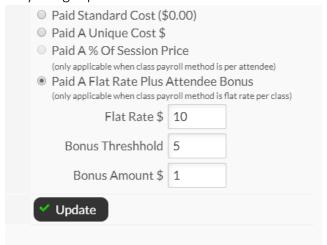
When you're on the instructor's tab of the class click the edit pencil to select how you want them to get paid when they teach that class.

- Paid A Unique Cost let's you enter in a specific dollar amount that you want to pay the instructor every time they teach this class.
- Paid A Flat Rate Plus Attendee Bonus let's you pay instructors based on the number of attendees that attend the class. If more than the threshold attend the class, then you can give them a bonus amount.





In this example, we've set it up to where this instructor will be getting paid \$10 if anywhere from 0-5 people attend the class. If more than 5 people attend the class, they will get paid an additional dollar for each extra attendee.



If pay rates for classes are setup here, then after an instructor teaches a class their pay will show up under reports > staff > session payroll.

If you want more information on classes, please refer to the complete guide to classes: https://www.clubready.com/wiki/WK23643603544





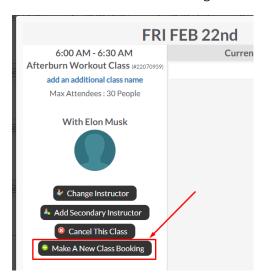
Making Bookings

There are a few different ways bookings can be made for and by clients:

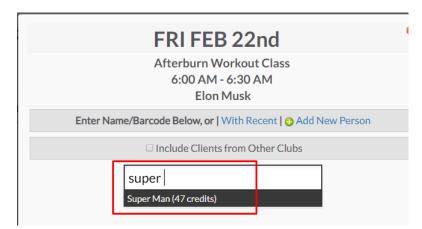
- Staff making client bookings in the ClubReady site
- Clients booking in their Wellness Portal
- Clients booking through the Fit Body Boot Camp App
- Clients booking through the ClubReady Members App
- Clients booking through the Class Kiosk App (as mentioned on page 1)

Staff Booking for Clients

Staff will navigate to bookings > classes > search & select the class the client wants to book into > and click "Make a new booking":



In the white box you will begin typing in the client's name & select the client that needs to be booked into the class:

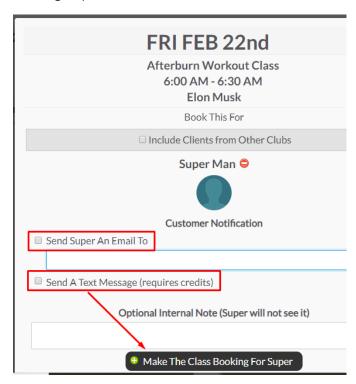






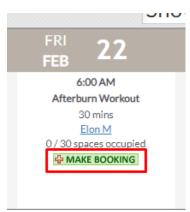
Please not that clients who have membership types to make their bookings will not say that they have credits but due to the Afterburn Workout class being setup to allow certain membership types to be able to book without credits you will be able to book those clients.

If the client wants to receive a New Booking Confirmation email you will select the email option and/or if they want to receive an SMS about the new booking you will select the Send A Text Message option > and then click "Make the Class Booking"



Wellness Portal Bookings

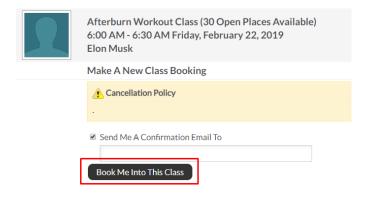
Clients can log into their Wellness Portal and navigate to Bookings > Class Schedules > search the class they want to book into and click "Make Booking" in green:





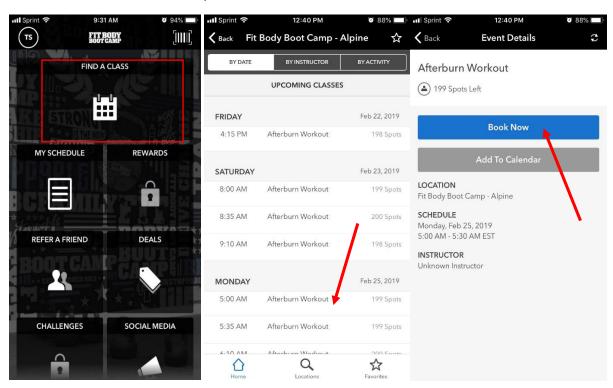


The system will default to want to send them a New Booking Confirmation email that they can choose to unselect, and then they will click "Book Me Into the Class":



Fit Body Boot Camp App

Clients will use their ClubReady username and passwords to book into the Fit Body Boot Camp App, run by Netpulse. Once they're logged into the FBBC App they will navigate to "Find a Class" > search & select the class they want to book into > and click "Book Now"



The system will automatically send them a New Booking Confirmation email when they book into a class through the FBBC App (if they have an email address on their ClubReady profile).

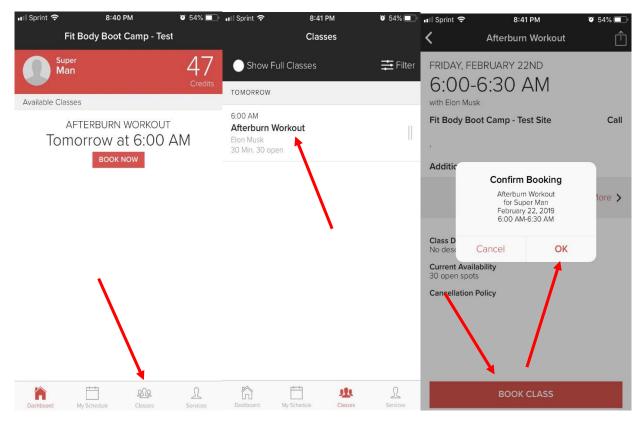
Add to Calendar will add the class to their phone's calendar but doing this <u>does not</u> book them into the class.





ClubReady Members App

Once the client is logged into the ClubReady Members App they'll click classes > search & select the class they want to book into > Book Now > and click OK to confirm & make their booking:



If the client has an email on file, they will receive the New Booking Confirmation email.

If you would like more information on the ClubReady Members App, please refer to the complete guide of this application: https://www.clubready.com/wiki/WK32267657677



