

TRAINING MANUAL

EXERP

Exerp Training Manual v20

FITNESS
fernwood[®]

The Expert's in Women's Health & Fitness

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Exerp App Summary

What's processed where?

Front Desk App



This is where you process POS purchases, sign in members and view the sales menu.

Membership Sale App



This is where all memberships, trials, subscription sales and recurring clip cards are processed and changes are made.

Person App



This is where you can view and edit a person's profile and view all details about their membership.

Cash Register App



This is where the start of day (open cash register) and end of day (close cash register) is done. You can also view transaction history.

CRM App



This is your lead management system. Schedules calls, sales appointments, manage and view incoming leads.

Calendar App



Manage and create bookings for all the club's services.

Reports App



View and pull easy extract reports.

Planning App



This is where you can manage the calendars. Open up shifts, change working times etc.

Finance App



This is where franchisees can view their direct debit information each fortnight.

Front Desk App

Signing in a member

Automatically – swipe the member card against the reader to automatically sign the member into the club. If they are booked into any classes or appointments within a 2 hour window of checking in to the club it will automatically attend them to the booking.

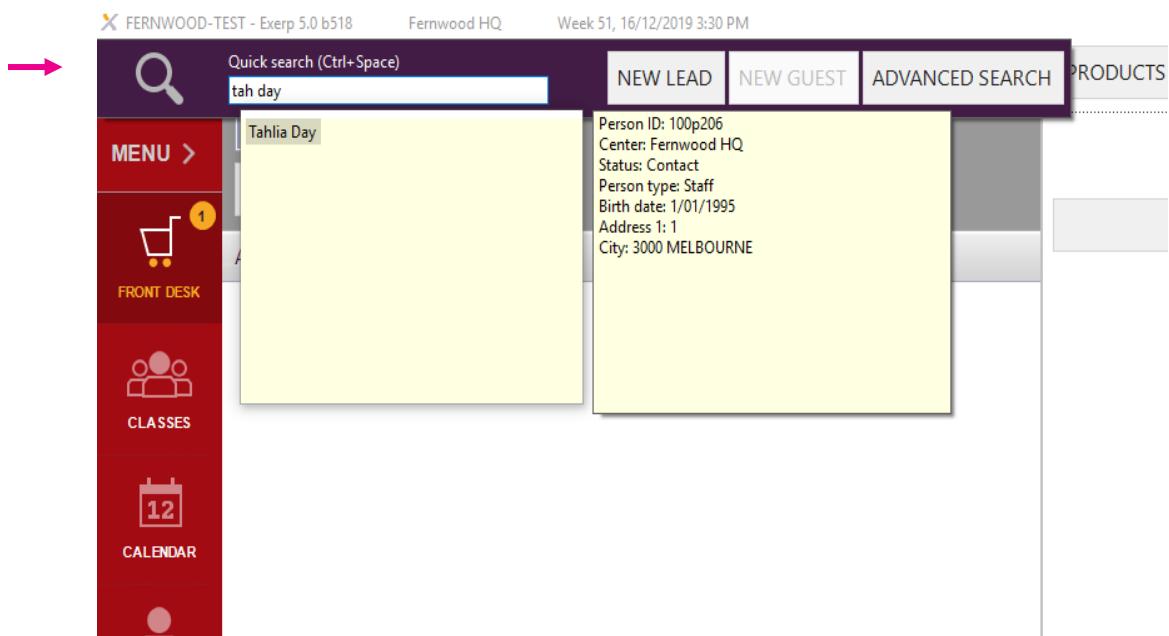
PLEASE NOTE: the Front Desk App doesn't have to be open for members sign themselves in via the card scanner. You can be processing a membership or booking into the calendar and it will log in member visits, whichever window you have open.

EXISTING FERNWOOD MEMBERS: You can still *Quick Search* a member by using their FCM Member ID on their card, by typing it into the Quick Search using the magnifying glass.

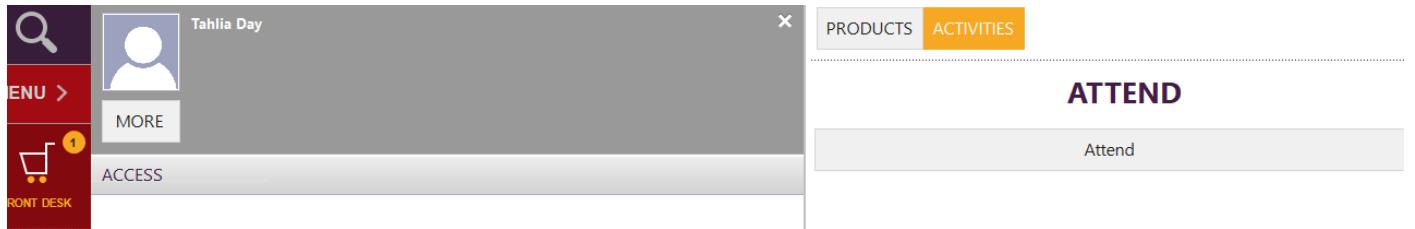
Manually – if a member doesn't have their card, you can manually sign them into the club but following the steps below.

Front Desk App > Search member > Select member > Activities > Attend

1. Click on the Front Desk app
2. Click on the magnifying glass and search the member (first 3 letters of the first name and first 3 letters of the last name)



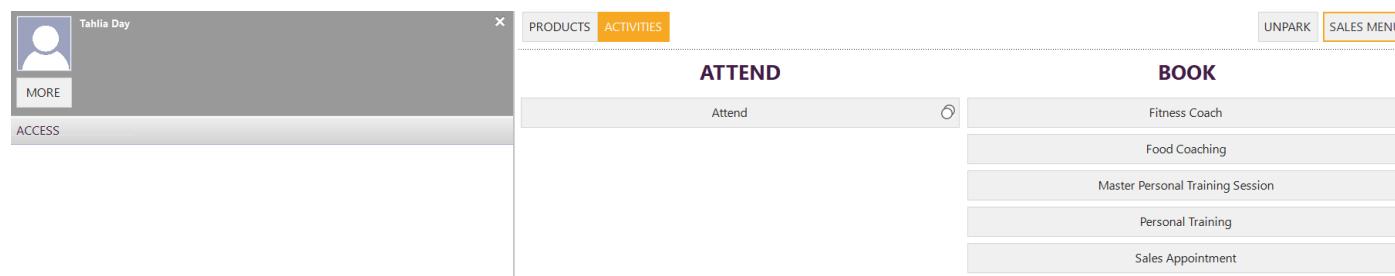
3. Double click on the members name
4. In the activities tab – click the attend button



Booking a member into a class from sign in

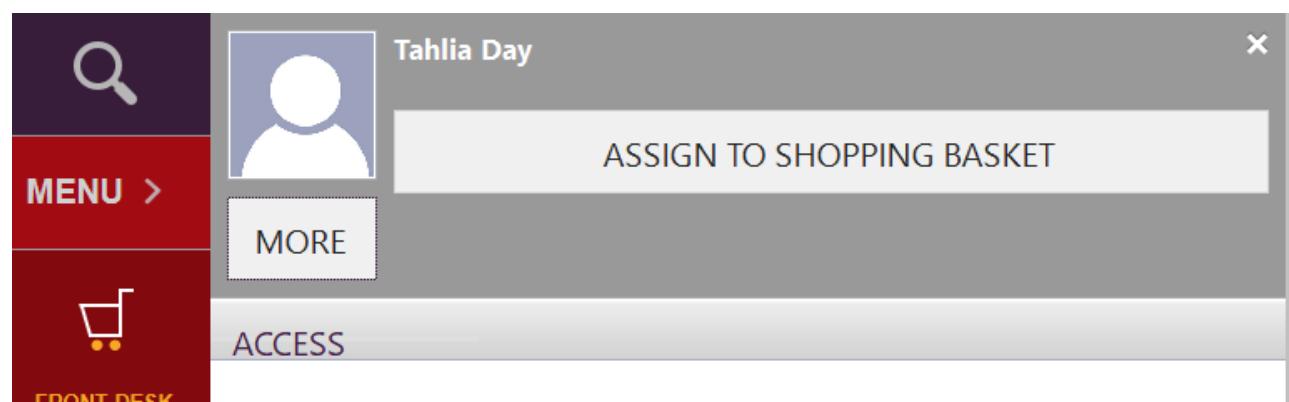
You can also book a member straight into a class or appointment from the front desk app.

- Once you have selected the member, you can sign them into the club by selecting the activity or class they are attending.



Processing a POS product

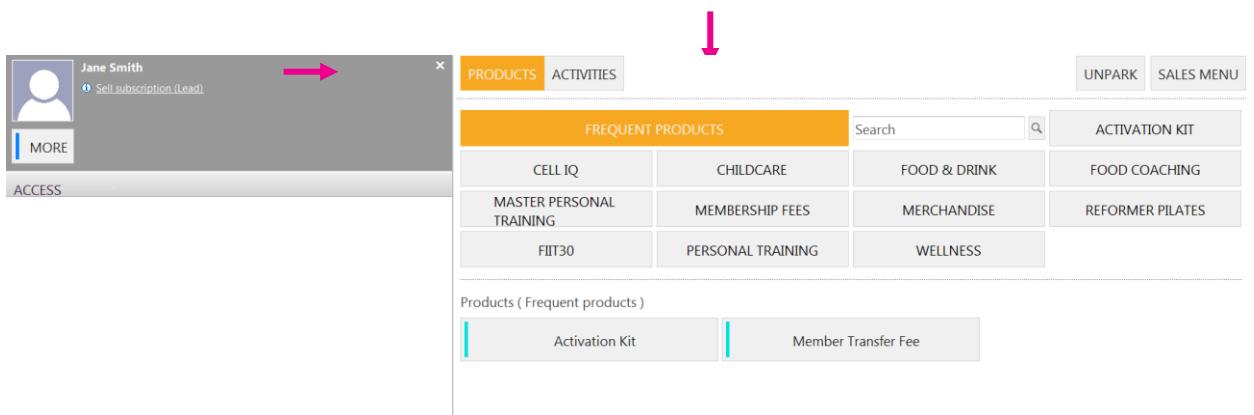
IMPORTANT NOTE: If a POS product requires a member to be linked to it (e.g. Personal Training 5 pack) it will be greyed out until you assign the sale to a member. To assign a sale to a member search for them in the magnifying glass in the top left corner of the screen. For items such as Merchandise they will not have to be assigned to a member.



To process a product under a staff or member's name:

Front desk > Search member > Select product > Cash register will open > Select payment method

1. Open the Front Desk app
2. Search the member's name (using first 3 letters of first and last name) using the magnifying search glass in the top left hand side of the menu bar
3. Click on 'Products' tab to search the product or service the person would like to purchase.
Select the product to purchase.



4. The cash register will drop down.



FREQUENT PRODUCTS		Search <input type="text"/> 🔍	ACTIVATION KIT
CELL IQ	CHILDCARE	FOOD & DRINK	FOOD COACHING
MASTER PERSONAL TRAINING	MEMBERSHIP FEES	MERCHANDISE	REFORMER PILATES
FIIT30	PERSONAL TRAINING	WELLNESS	

Products (Food Drink)

Protein Bar Choc Mint	RTD Protein Shake Chocolate
-----------------------	-----------------------------

1 Protein Bar Choc Mint	4.95	X
		Jane
\$4.95		
CARD (4.95)	CASH (5.00)	
OTHER PAYMENTS		

5. Select payment type and finish the transaction.

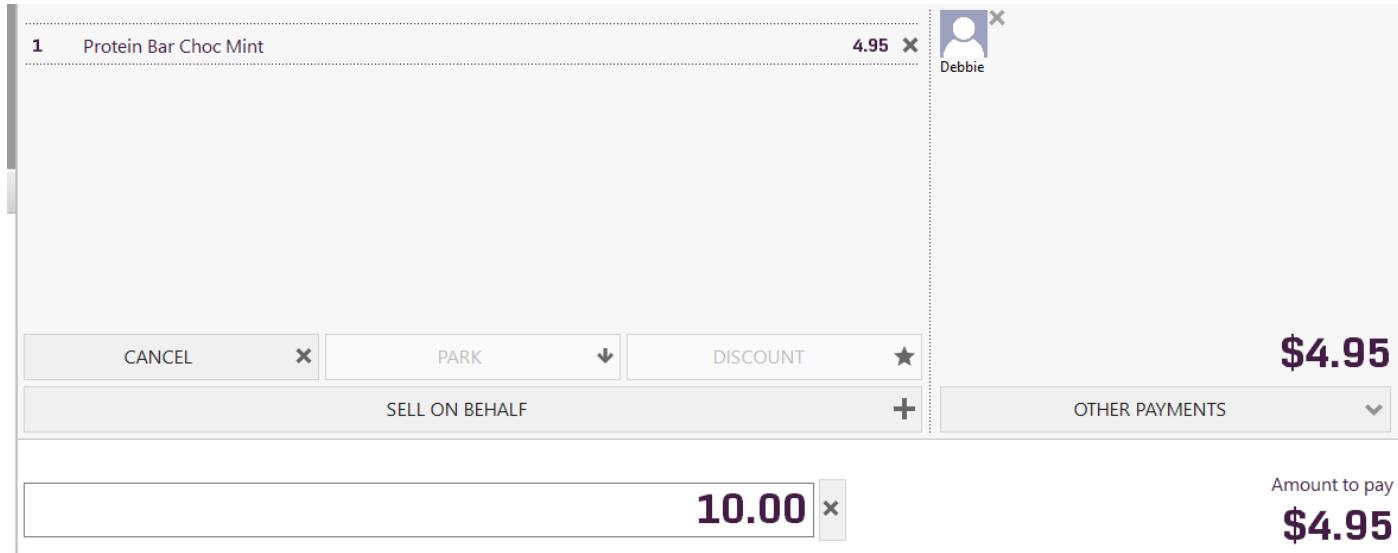
- a. If the member purchases something by card, ensure this is processed on the card terminal as well

Jane	
\$4.95	
CARD (4.95)	CASH (5.00)
OTHER PAYMENTS	

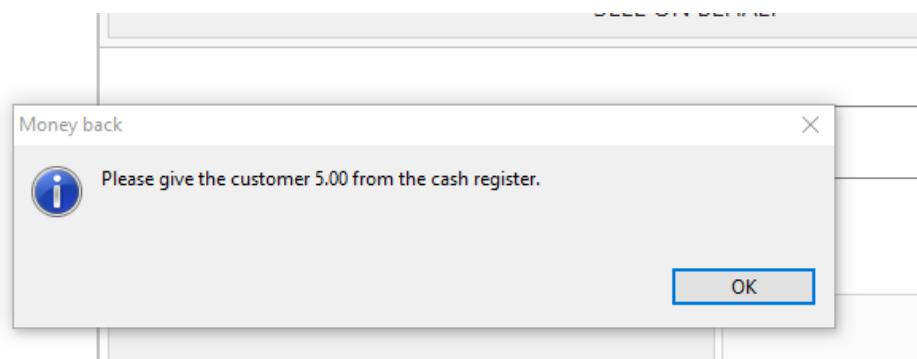
Giving the correct change to a member

Process the POS product > Other Payments > Enter cash given > Click CASH > Transaction will save and give you the amount of change to hand to the member.

1. If a member pays for an item with cash, to ensure you are giving the member the right amount back. Simply click on OTHER PAYMENTS and enter the amount of cash the member is handing over. For example, \$10 cash handed over for the protein bar.



2. Click on CASH and the system will tell you how much change to give to the member.



Pushing an item to their next direct debit

Front desk > Select Item > Other Payments > Payment Account

Payment account can be used so that any item in POS can be pushed directly onto the member's next direct debit. The member won't have to pay anything up front for the item and the full amount will be processed on their next membership debit.

CANCEL X PARK ↴ DISCOUNT ★

\$19.95

SELL ON BEHALF + OTHER PAYMENTS ▾

Amount to pay **\$19.95**

CHEQUE			PAYOUT ACCOUNT 0.00 \$
GIFT CARD		CASH ACCOUNT	
7	8	9	CASH (19.95) ⚙
4	5	6	
1	2	3	
00	.	0	CREDIT CARD 📲

Other Payment Method

Front Desk > Find member > Select product > Select 'Other Payments' > Select 'Paid into Account'

'Paid into Account' is a payment method for those other payment methods that are not cash or card.

1. Bring up item in front desk
2. Select 'Other Payment'
3. Select 'Paid into Account'

1 PT Pack - 5 Sessions **215.00** X

Julia

CANCEL X PARK ↴ DISCOUNT ★

\$215.00

SELL ON BEHALF + OTHER PAYMENTS ▾

Amount to pay **\$215.00**

CHEQUE			PAID INTO ACCOUNT
GIFT CARD		CASH ACCOUNT	PAYOUT ACCOUNT 0.00 \$
7	8	9	CASH (215.00) ⚙
4	5	6	
1	2	3	
00	.	0	CREDIT CARD 📲

The screenshot shows a software interface for managing products and activities. At the top, there are tabs for 'PRODUCTS' and 'ACTIVITIES'. In the top right corner, there are buttons for 'UNPARK' and 'SALES MENU'. Below the tabs is a grid titled 'FREQUENT PRODUCTS' containing various categories: ACTIVATION KIT, CASUAL VISIT, CELL IQ; CHILDCARE, FERNWOOD FOUNDATION, FOOD & DRINK; MEMBERSHIP FEES, MERCHANTISE, OTHER; FIIT30, PERSONAL TRAINING, REFORMER PILATES; and FOOD COACHING.

Below the grid, a section titled 'Products (Personal Training)' displays a selected item: 'PT Comp Session'. To the right of this item is a search bar labeled 'Search' with a magnifying glass icon. The selected item has a yellow border. Other items in the list include 'PT Pack - 1 Session' and 'PT Pack - 10 Sessions'. A detailed view of the 'PT Comp Session' is shown on the right, featuring a profile picture of a woman named Julia and a large '\$215.00' price. Below the price are buttons for 'CARD (215.00)' and 'CASH (215.00)'. A red oval highlights the 'OTHER PAYMENTS' button, which is located at the bottom right of the payment method section.

Splitting an item over an instalment plan

On some items in the Front Desk members can pay for an item by splitting it over an instalment plan of 2 or more direct debits, they will have the option to do so.

Search member > Front Desk > Select Item



with icon

PRODUCTS

ACTIVITIES

UNPARK

SALES MENU

FREQUENT PRODUCTS

Search



ACTIVATION KIT

CELL IQ

CHILDCARE

FERNWOOD FOUNDATION

FOOD & DRINK

MASTER PERSONAL TRAINING

MEMBERSHIP FEES

MERCHANDISE

FIIT30

PERSONAL TRAINING

REFORMER PILATES

FOOD COACHING

WELLNESS

Products (Personal Training)

PT Comp Session

PT Pack - 100 Sessions

PT Pack - 1 Session

PT Pack - 10 Sessions



PT Pack - 15 Sessions



PT Pack - 20 Sessions



PT Pack - 3 Sessions

PT Pack - 5 Sessions

1. Open the Front Desk App > Find your member > Select the product they wish to purchase.
2. Select the number of instalments the member wishes to pay over

Select payment type for product:

"PT Pack - 15 Sessions"

PAY NOW!

3 INSTALMENTS

2 INSTALMENTS

By selecting the credit option "Installment", the customer then does not have to pay the full amount up front, but will be collected over several months using a valid payment agreement.

Cancel

3. This will automatically use the details that are stored on their profile already.

- The receipt for the purchase will pop up for you to either print or save and email to the member.

Applying a discount to a POS Product

Front Desk App > Select your POS product > Cash Register will appear > Select Discount > Enter campaign code

Once you select 'Ok' to the campaign code, the relevant discount will be applied and then you can proceed with the purchase by selecting the payment type to finalise transaction.

The screenshot shows the 'PRODUCTS' tab selected in the top navigation bar. Below it is a grid of categories:

FREQUENT PRODUCTS		ACTIVATION KIT	
CELL IQ	CHILDCARE	FERNWOOD FOUNDATION	FOOD & DRINK
MASTER PERSONAL TRAINING	MEMBERSHIP FEES	MERCHANDISE	FIIT30
PERSONAL TRAINING	REFORMER PILATES	FOOD COACHING	WELLNESS

Below the grid, a search bar is visible with the placeholder 'Search' and a magnifying glass icon. The text 'Products (Frequent products)' is displayed at the bottom left of the main content area.

The screenshot shows a cash register interface. On the left, a purchase is listed: '1 Fernwood Drink Bottle' with a price of '7.50'. To the right of the purchase is a customer profile for 'Tahlia'. At the bottom right, the total amount '\$7.50' is displayed. Below the total are payment method options: 'CARD (7.50)' and 'CASH (7.50)'. At the very bottom, there are buttons for 'CANCEL', 'PARK', 'DISCOUNT', and 'OTHER PAYMENTS'.

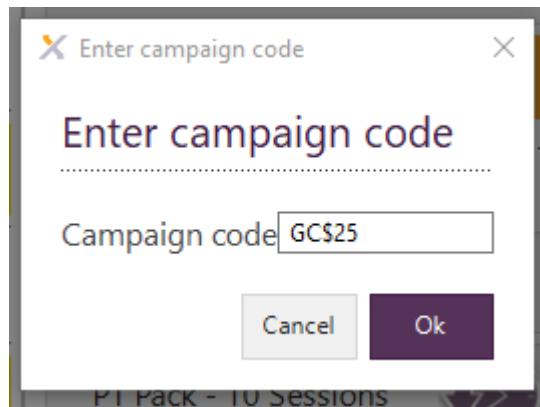
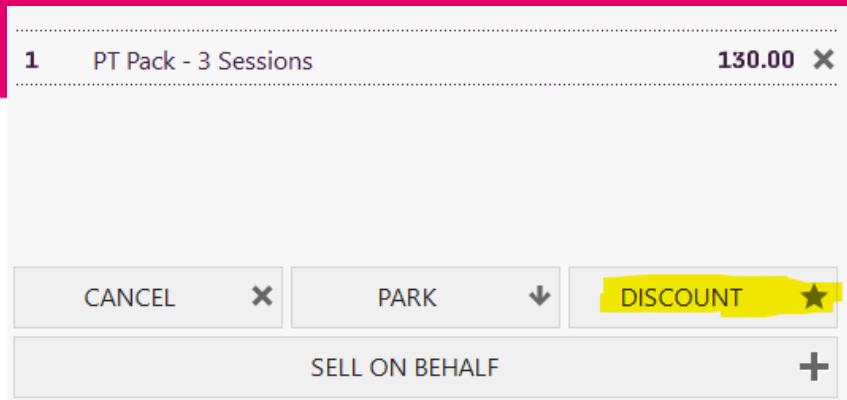
Giftcards

We have set up the following campaign codes for gift cards that are redeemed in club. These would be applied on a POS product in the Front Desk App.

Use the code GC\$25 - \$25 GIFTCARD

Use the code GC\$100 - \$100 GIFTCARD

For a full list of campaign codes please refer to the list on the Fernwood Intranet under the Operations page > Exerp Training Manual.



Park a sale in POS

When processing a product or service through POS, Exerp has the ability to park a sale half way through the transaction and then move to another computer to finish off the sale or return to the transaction later in the day.

This function can be used if another staff member needs to use the computer you are on or if the member needs to get to a session and will return to pay later in the day.

If you are wanting to park a sale, a product must be allocated to a person first. When you have added the products to the cash register, select the 'Park' tab down the bottom of the cash register to park the sale.

The screenshot shows a POS system interface with the following components:

- Top Navigation:** PRODUCTS (selected), ACTIVITIES, UNPARK, SALES MENU.
- Category Selection:** FREQUENT PRODUCTS, FOOD & DRINK (selected), ACTIVATION KIT.
- Product Categories:** CELL IQ, CHILD CARE, FOOD COACHING; MASTER PERSONAL TRAINING, MEMBERSHIP FEES, REFORMER PILATES; FIIT30, PERSONAL TRAINING, WELLNESS.
- Search Bar:** Search []
- Product List:** Products (Food Drink) - Protein Bar Choc Mint, RTD Protein Shake Chocolate.
- Parking Screen:**
 - Item: 1 Protein Bar Choc Mint, Price: 4.95, Remove button (X).
 - User: Jane (represented by a person icon).
 - Total: \$4.95.
 - Payment Options: CARD (4.95), CASH (5.00).
 - Buttons: CANCEL (with X), PARK (with dropdown arrow), DISCOUNT (with star), OTHER PAYMENTS (with up arrow).

Unpark a sale in POS

To 'Unpark' the sale to complete the transaction, all you need to do click on 'UNPARK' in the top right hand side of the screen of the cash register



An 'Unpark basket session' page will pop up and you will be able to select which product you would like to 'unpark' to complete the transaction for the particular person. Be sure to select the correct person to finish off transaction. The cash register will now and you will be able to select the payment method the person will be paying with. Transaction is now complete.

Unpark basket session

A table showing a list of items in the basket. The first row, which corresponds to the item for Jane Smith, has a red arrow pointing to it.

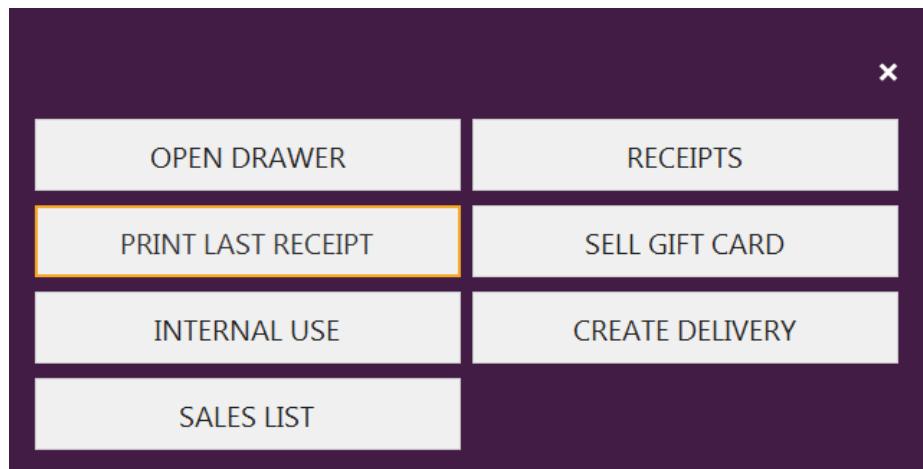
Name	Products	Amount
Jane Smith	Protein Bar Choc ...	4.95
Naomi Test	Childcare 10 Sessi...	50.00
	RTD Protein Shake...	4.95
Membership And PT	ProRata Personal T...	0.00
Membership And PT	Activation Kit (1); ...	385.14





Sales menu tab

PRODUCTS ACTIVITIES UNPARK SALES MENU



Sales list

View the transaction list of everything that is sold on a particular day, date range period or under a customer/member. This is where you can also cancel a sale – Club Manager Access Only

Sales list

Date	Text	Amount	Customer	Center	Sales rec...	Credit	Employee	Date printed	Fis...	Invoice r...	Date issued

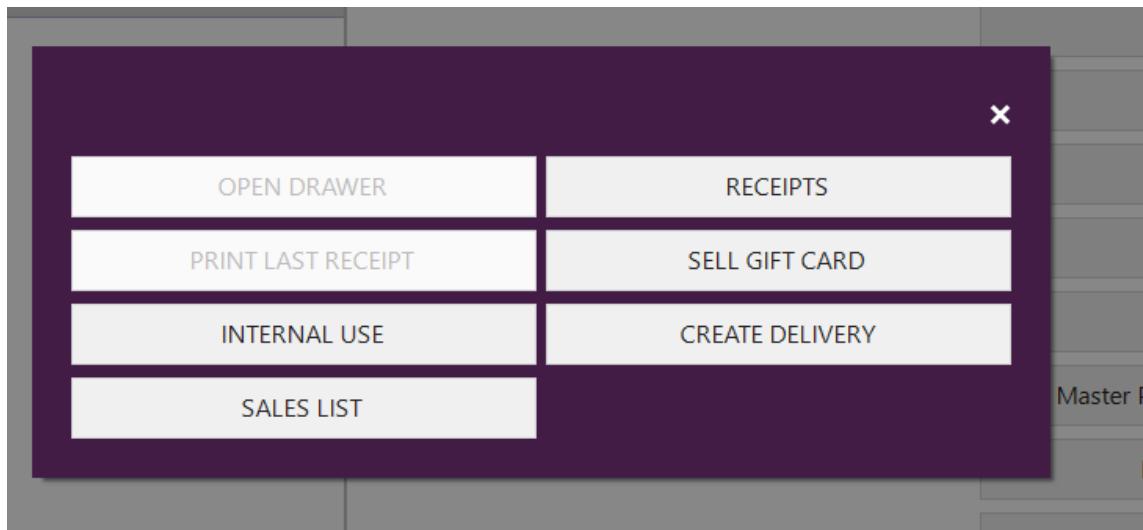
[View sales receipt](#)[View credit note](#)[Cancel sale](#)[Print fiscal receipt](#)[Print invoice](#)[Close](#)

Cancelling a transaction

Front desk app > Sales Menu tab > Sales List > Select transaction > Cancel Sale > Select Credit Sales Line

To cancel a transaction that has been put through the cash register:

1. Open the front desk app > select the Sales Menu tab in the top right corner of the screen > select Sales List.



2. Select your chosen transaction and click the 'Cancel Sale' button

Sales list

Date	Text	Amount	Customer	Center	Sales re...	Credit	Employee	Date printed	Fis...	Invoice ...	Date issued
1/02/2020 2:17 AM	Activation Kit	149.00	100p1202	Fernwo...	100inv1...		Sabrina...	1/02/2020 2:18 AM	No		

POINT OF SALE
Center Fernwood HQ Cash register Cashregister

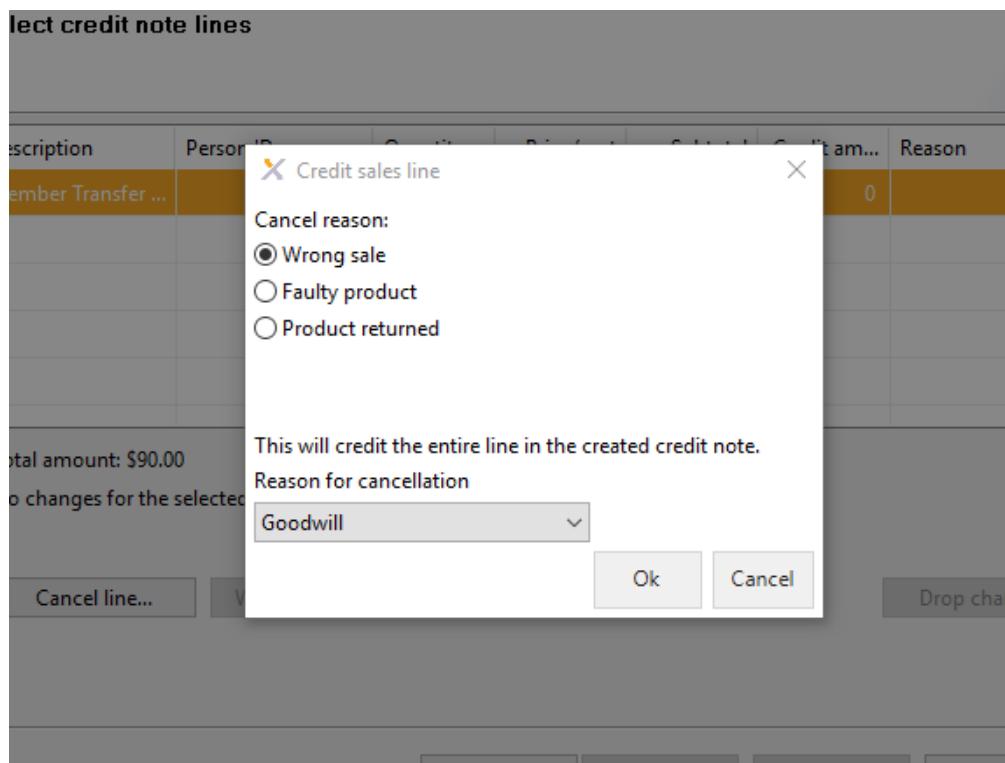
PERIOD
Date interval Today 1/02/20 1/02/20

CUSTOMER
Receipt
Person

Buttons at the bottom: View sales receipt, View credit note, **Cancel sale** (circled in red), Print fiscal receipt, Print invoice, Close

3. Select credit sales line
4. Select the item of the sales transaction you wish to cancel > Cancel Line

5. Select reason for the transaction being cancelled > Click OK



6. Enter the reason for cancelling the sale.

Create credit note

Enter reason

Header text

Note that the header text above is visible to the member on his account.

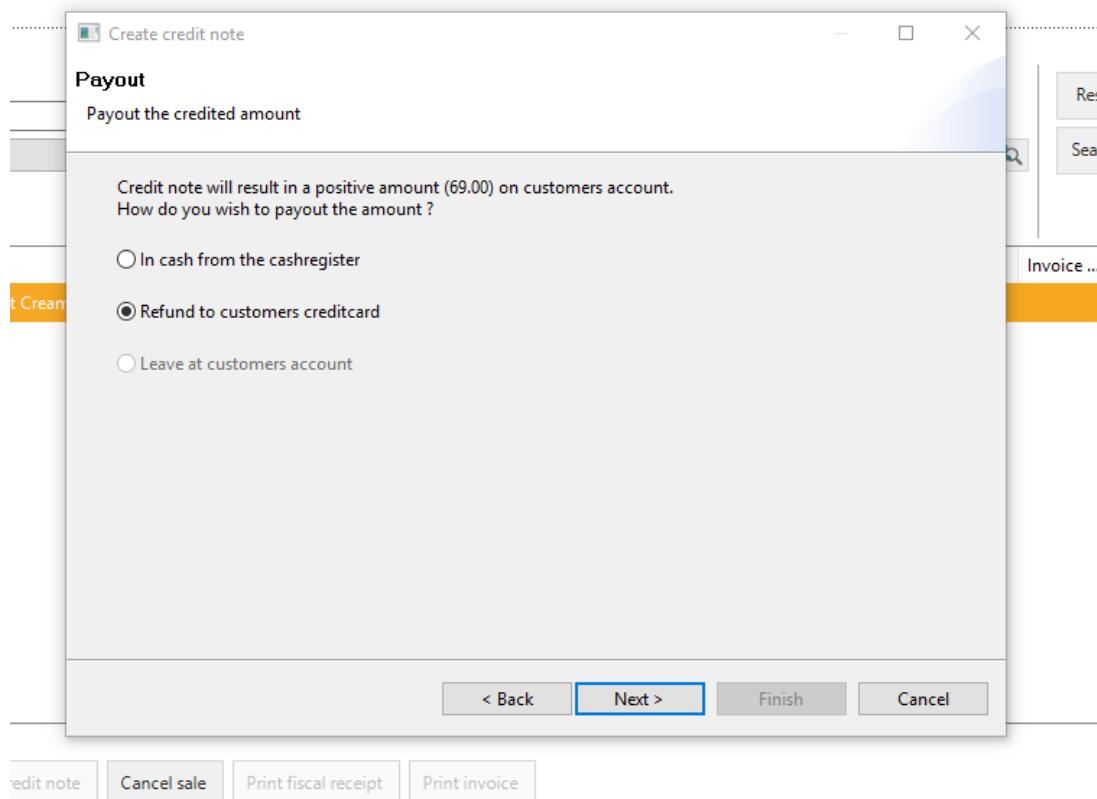
Enter the reason for creating the credit note:

Date the credit note back in time 17/03/20

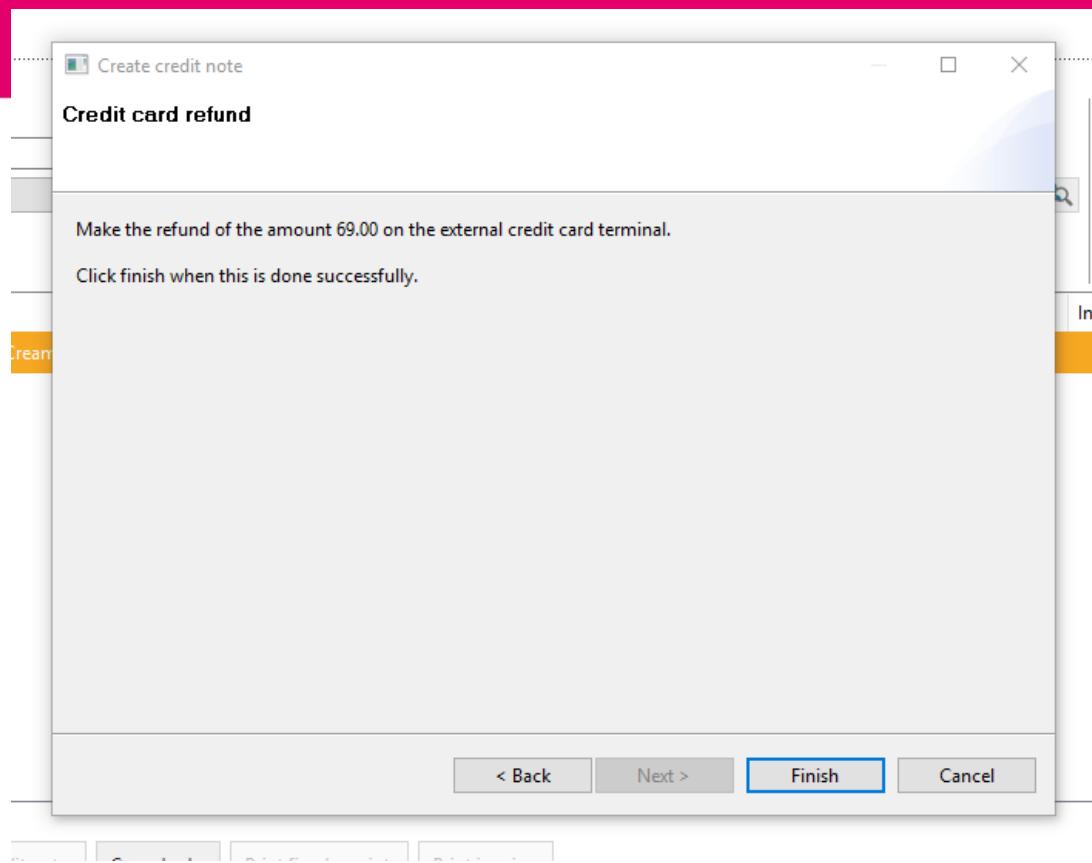
< Back Next > Finish Cancel

credit note Cancel sale Print fiscal receipt Print invoice

7. Select the refund to either cash register (cash sale) or to the members card (EFTPOS payments). This won't refund anything to the member as the EFTPOS terminal is not linked to EXERP. Once you have finished this process, refund the amount to the members cards on the EFTPOS TERMINAL.



8. Select FINISH – and the sale will now be successful cancelled.



Membership Sale App

How to create a lead

1. Click on the magnifying search glass in the top left hand side of the menu bar and select 'New lead'



2. Enter in member's details. The centre name should appear for your club. Click next

Create lead

Center	<input type="text" value="Fernwood HQ"/> 	COMMUNICATION	
PERSON DETAILS			
Name	<input type="text" value="Jane"/>	<input type="text" value="Smith"/>	Home phone <input type="text"/>
Gender	<input type="text" value="Female"/>	Mobile phone <input type="text" value="+61 4 2234 0789"/>	E-mail <input type="text" value="jane.smith@smith.co"/>
Birth date	<input type="text" value="15/03/1991"/>	28 years	
Comment	<input type="text"/>		

POSSIBLE DUPLICATES

No duplicates found

Next  **Cancel**

3. Leave all communication channels ticked or change if need be. Select next



The communication channels that are selected here refer to **Service Messaging**. This is all emails and SMS related to appointments, deferrals, membership administration tasks etc. that are sent through Exerp. If they opt out of these, they won't receive any of these type of communications so we definitely recommend to gather the correct information here. This does not refer to marketing and 3rd party communications.

Communication channels

Select available communication form

Letter
 E-mail
jane.smith@smith.com
 Phone
 SMS
Mobile phone +61 4 2234 078
 Charged SMS

Select preferred communication form

No channel
 E-mail
 SMS

We can send you details on special offers, promotions and activities. Please choose selected services below.

Is accepting email newsletters
 Is accepting third party offers



[Previous](#) [Next](#) [Cancel](#)

4. Enter in postal information. Select next

Postal information

SSN	<input type="text"/>
First name	Jane
Last name	Smith
Sex	Female
C/O name	<input type="text"/>
Address 1	49 Elizabeth Street Richmond
Address 2	<input type="text"/>
Country	Australia
Postcode	3121 VIC <input type="text" value="RICHMOND"/>
Birth date	15/03/1991 d/MM/yyyy

↓

[Previous](#) [Next](#) [Cancel](#)

5. Complete the GTKYF

Tell us all about you

Let us know how we can help you

Have you been a member of a fitness club before?

- Yes
- No

What are your top 3 health and fitness goals?

- Weight Loss
- Energy / Lifestyle
- Toning / Shaping
- Wellness
- General Health
- Other

When do you want to achieve your goals by?

- ASAP
- 4 Weeks
- 3 Months
- 6 Months
- Other

What time of day would you be planning on visiting

- Early Morning
- Mid Morning
- Lunctime
- Afternoon
- Evening

How often will you visit the club?

- 1-2 times a week
- 3-5 times a week
- Daily

Is anyone joining you for your first visit?

- Yes
- No

How committed are you right now to change?

- Very Committed
- A little committed
- Unsure

Print 

Previous  Next  Cancel

6. Select the person type. Click on finish.



Relation

- Private
This is the default person type, the person type of an ordinary member.
- Student
 Staff
 Friend
 Corporate
 One man corporate
 Family
 Senior
 Guest
 External staff

Previous **Finish** Cancel



Processing a Membership Sale

Membership Sale App > Search for person using the magnifying glass > Select your membership type, NEXT > Select any membership add-ons (i.e. FIIT30 Flexi) > Personal Details > Set up Payment Agreement, NEXT > Membership Summary Screen > Member Card, Member Photo & Signature Pad > Front Desk Payment/Instalment plan > SAVE.

1. Click on the 'Membership sale' app in the menu bar on the left hand side of the screen



2. Search the member's name by clicking on the magnifying search glass on the top left hand side of the menu bar. Either quick search the member (first 3 letters first name & first 3 letters last name) OR click on advanced search.



3. Enter in the person's name, select find and then open profile.

Person search

STANDARD SEARCH

Name	Mary
Address	
Postcode	
Birth date	
Other	
Account number	
Scope	Fernwood HQ
Person type	All

SEARCH RESULTS

Name	Birth d...	Person type	Status	Center
Mary Smith	20/04/...	Private	Lead	Fernwood HQ

EXTRACT

Use extract

Search limit

PREVIEW

Id 100p601
 Center Fernwood HQ (100)
 Status Lead
 Type Private
 Address 47 Elizabeth Street
 City MELBOURNE

4. You will now see the member's name up the top in a new tab. Select the type of membership the member would like to purchase. Click on 'Next' to continue.



New membership Mary Smith X Add +

SELECT PRODUCT

Mary Smith (Lead) - Private

PRIVATE ▼ PERSON PROFILE * ENTER CAMPAIGN CODE

TRIALS	FLEXI	18 MONTHS	12 MONTHS	6 MONTHS	3 MONTHS	FIIT30	PERSONAL TRAINING
--------	-------	-----------	-----------	----------	----------	--------	-------------------

Subscriptions (18 Months)

18 Month Fixed Term \$46.00	18 Month Ongoing \$46.00
--------------------------------	-----------------------------

18 Month Ongoing X

Price \$46.00/week
Joining fee \$199.00

Total

Joining fee \$199.00
Administration fee \$348.00
Period Price \$46.00/week



Select product Personal details Summary Signature BACK » NEXT »

5. Select any Add-Ons the member wishes to add onto their gym membership i.e. FIIT30 Flexi

SELECT ADD-ONS

ALL	FIIT30	REFORMER PILATES	WELLNESS	WELLNESS WEDNESDAYS	CHILDCARE
-----	--------	------------------	----------	---------------------	-----------

Add-ons

Wellness Wednesdays \$18.00	FIIT30 Flexi \$50.00	Reformer Pilates Flexi \$50.00	Childcare Flexi 1 Child \$30.00	Wellness Flexi \$50.00	
--------------------------------	-------------------------	-----------------------------------	------------------------------------	---------------------------	--

12 Month Ongoing X

Price \$52.00/2 weeks
Joining fee \$199.00

FIIT30 Flexi
\$50.00/2 weeks

Total

Joining fee \$199.00
Administration fee \$348.00
Period Price \$102.00/2 wee

✓ Select product » Select add-ons Personal details Summary Signature BACK » NEXT »

6. Check personal details or edit/update as required. Set up payment agreement information.

PERSONAL DETAILS

Gender	<input type="radio"/> Male	<input checked="" type="radio"/> Female		
First/last name	Sarah	Smith		
Birth date	15/03/1991	d/MM/yyyy		
Age	28			
C/O name				
Address 1	20 Mills Road Glenhaven			
Address 2				
Postcode	2000	NSW	SYDNEY	Australia
<input type="checkbox"/> Use different invoice address				
Mobile phone	<input type="checkbox"/> Allow SMS			
Home phone	<input type="checkbox"/> Allow charged SMS			
E-mail	ssmith@gmail.com.au <input checked="" type="checkbox"/> Allow service messages			
Preferred channel	None <input type="checkbox"/>			
<input type="checkbox"/> Is accepting email newsletters <input type="checkbox"/> Is accepting third party offers				

Who will pay?

<input checked="" type="radio"/> Person self (Sarah Smith)
<input type="radio"/> Search
<input type="checkbox"/> Create new agreement

Payment agreement

How would Sarah Smith like to pay ?

<input checked="" type="radio"/> Direct Debit

Clearinghouse creditor

Clearinghouse creditor	Fortnightly DD
------------------------	----------------

Payment cycle

Payment cycle	Fortnightly
Individual deduction day	Thursday (Even Weeks)

Bank account

Account holder	SMITH SARAH
Bank registration number	923-100
Bank account number	0000000
Bank name	ING Direct
Bank extra info	Level 28 60 Margaret Street Sydney NSW 2000

Select product Select add-ons Personal details Summary Signature BACK NEXT

Direct Debit: Member paying for their membership via bank account – enter details on this page

Credit Card: Member paying for their membership via credit card – redirect to “open completion web page”. This will redirect you to a webpage to securely enter the members credit card details.

How would Tahlia Day like to pay ?

- Direct Debit
- Credit card

Agreement

How should the agreement be completed?

- Send mail with link
- Use card terminal
- Open completion web page
- Manual

- Membership Summary page – check all details of the membership are correct. You can adjust the start date of the membership. Click NEXT.

Club Managers will have the access to override prices on this page if required. To override a price click on the 'Override' tab next to the type of product you want to change the price for and enter in the new price in the pop up screen. Click on 'Next' to continue.

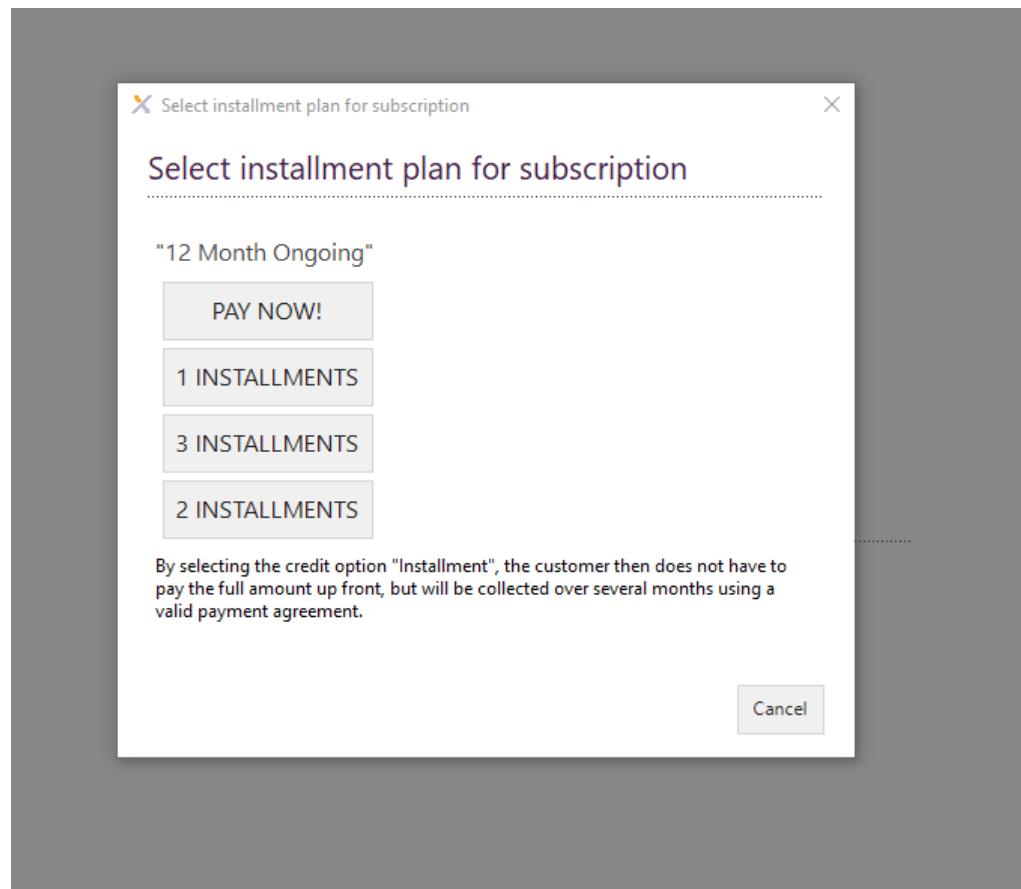
8. Take the member photo > Assign a member card/24 Hour FOB if applicable and go through membership paperwork and digital signature process with the member.

9. Complete the sale and process any up front payments of the membership or split any outstanding payments over an instalment plan.

The screenshot shows a software interface for managing customer profiles and sales. On the left, a sidebar displays a user profile for "Jane Test" with a status of "Sell subscription (Lead)". Below this are sections for "MORE" and "ACCESS". At the bottom of the sidebar are buttons for "IN CENTER" and "ATTENTION". The main area features a navigation bar with tabs for "PRODUCTS" and "ACTIVITIES". Under "PRODUCTS", there's a section for "FREQUENT PRODUCTS" with categories like CELL IQ, CHILD CARE, FOOD & DRINK, etc. A search bar and a "SALES MENU" button are also present. The right side shows a transaction summary for "Activation Kit" and "Member Transfer Fee" totaling \$175.00. Payment methods listed are CARD (175.00) and CASH (175.00). A red arrow points from the text "Splitting an Activation Kit or Start-Up Fees over Direct Debit" to the "CASH (175.00)" button.

Splitting an Activation Kit or Start-Up Fees over Direct Debit

If the member wants to split their Activation Kit or start-up fees (joining fee, pro-rata) over their first few direct debits, when you complete the membership sale process it will bring an instalment screen before you complete the sale. You have the option to split their start-up payments over 1,2,3,4,5,10 or 26 debits.



Signature Pad Process

1. Ensure your signature pad has been successfully set up using the signature pad installation document available to you on the Intranet (Operations page > Exerp Training Manual)
2. When you get to the signature section of the sign-up process you can select **View on Device** which will bring up the membership agreement on the signature pad for members to review prior to signing.
3. Once the member is ready to sign > select the **Sign** button. It will load on the signature pad, the member signs or initials and it will load back onto the Exerp screen. It is critical you wait for their signature to populate in the signature image box before selecting Next. This can take a few seconds depending on your internet.

The screenshot shows the Exerp membership sign-up process. On the left, there is a 'Member picture' placeholder with a 'Take picture' button below it. On the right, a red box highlights the 'Customer Initial 1 (1/4)' step, which includes a 'Signature image' box, a 'Sign' button, a 'Preview document' button, and a 'View on device' button. Below this, there is a 'Choose what to do with member card' section with two options: 'Assign a new member card' (selected) and 'Continue with no member card'. To the right of this is a navigation bar with buttons for 'Customer', 'BACK', and 'NEXT'.

Member picture

Customer Initial 1 (1/4)

Choose what to do with member card

- Assign a new member card
- Continue with no member card

Customer Initial 1 (1/4)

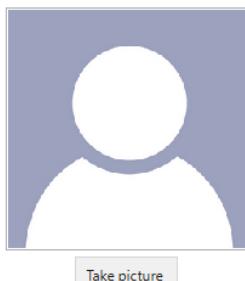
Choose what to do with member card

- Assign a new member card
- Continue with no member card

4. Once the signature has loaded as per the image above, you can then select next to move through each signature step.
5. There are 4 signatures required in total for the membership sign up.

- a. Initials from the member agreeing to the 24/7 policy, privacy policy and membership terms & conditions
- b. A customer signature agreeing to the membership agreement
- c. A staff signature of the staff member who is processing the sale
- d. A customer signature for the direct debit request

Member picture



Customer Signature (2/4)

Signature image

Sign

Preview document

Stop viewing document

Choose what to do with member card

Assign a new member card

Card type

Card number

Continue with no member card

✓ Customer Initial 1

Custome

BACK

NEXT

Viewing a signed membership agreement

When a member has successfully signed up through Exerp, they will receive their welcome email with their membership agreement attached. This copy will be an unsigned version.

1. To review their membership agreement go into their person profile > Journal > Documents. You will notice a little padlock next to the PDF document indicating it has been signed.

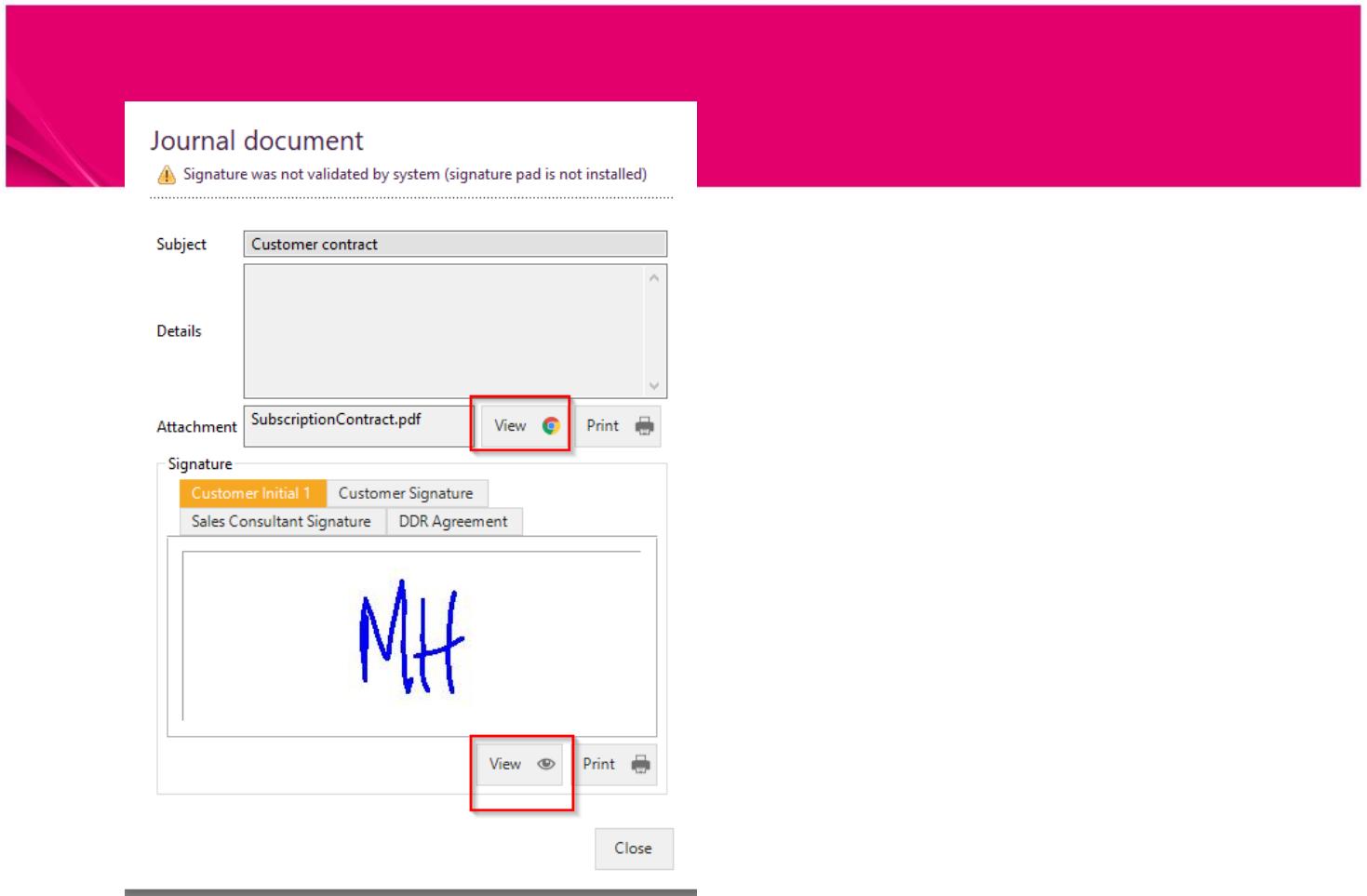
Markayla Hanna

Summary Details Membership Journal Account Booking Relations

Attend log Documents Messages Questionnaires To-do's Tasks Log Status history Change history

Created date	Subject	Created by	Person	Filename	Type	Signed time
5/08/2020 4:38 PM	Payment note	Mark Hanna	708p8602		Payment note	
5/08/2020 4:38 PM	Customer contract	Mark Hanna	708p8602	SubscriptionContract.pdf	Subscription contract	2020-08-05 16:34
5/08/2020 4:32 PM	EFT agreement	Mark Hanna	708p8602		Payment agreement contract	
5/08/2020 4:32 PM	Person created	Mark Hanna	708p8602		Note	

2. A new window will pop up with two sections – the top section is the unsigned PDF version of the contract, however the section below where the signatures are located will produce the signed copy of the contract.



IN-CLUB RECOMMENDATIONS FOR THE SIGNATURE PAD

- Print off a template version of the membership agreement that you can have laminated at reception. This way for any members that are having difficulties reading the smaller text on the signature pad they can read through a paper copy.
- If you have any members that have signed up through Exerp and you have completed a paper sign-up, you will notice they have an alert on their profile "**Missing document to be signed**".
 - To remove this alert you can simply click on the text and it will bring up the document that needs to be signed. Provided that the member has signed a copy of their agreement, you can get a staff member to go through the signature pad process and where it prompts a signature just write Paper Copy so you have reference.
- For those clubs on Gantner this is very important as if there is a missing document to be signed, it will block their entry to the club.

Unsigned paperwork report

We have put together a report for clubs to pull to see which members have unsigned paperwork so it is easy to track on your end in club.

Reports App > Extract Wizard > Franchisee > Unsigned Member Contracts

View a completed membership

Person profile > Membership Tab > Subscriptions

Membership subscription is now complete and will appear under the 'Membership' tab, under 'Subscriptions.'

Jane Test

Summary Details **Membership** Journal Account Booking Relations

Subscriptions Clip cards Privileges Privilege usages

Name	Center	Status	Sub-state	Current ...	Start	Stop	Bind. exp	Billed un...
12 Month Ongoing	Fernwood HQ	Active	None	\$2.00	5/12/20...	2/12/20...		11/12/2...

View Change Edit members New add-on Prepay Reactivate Regret sub. Stop Delete Subscription

Freeze Free periods Blocked periods

Contractual Unrestricted No upcoming freeze Include old Include cancelled

Start date	Stop date	Days	Entry time	Comment	Type	Created	Created by
------------	-----------	------	------------	---------	------	---------	------------

Create Edit Cancel Stop

Processing a Referral as part of the Membership Sale

When processing a membership you can also link them to an existing member to action them as a referred member. This is a really useful tool when processing girlfriend memberships or doing a referral campaigns in club.

In the membership sale app, on the first screen when you select the membership type the member is joining on, you can select the box **IS REFERRED**.

New membership

SELECT PRODUCT

Person type **PRIVATE** Is referred

EXTRAS **TRIALS** **FLEXI** **18 MONTHS** **12 MONTHS** **6 MONTHS** **3 MONTHS**

Subscriptions

When this box is checked, on the personal details screen of the membership, you will then be prompted to link the referring member to the referred member.

12 Month Ongoing X Add +

PERSONAL DETAILS

Gender Male Female

First/last name

Birth date d/MM/yyyy

Age

Referred by Search

Who will pay? Person self (Anonymous) Search

Payment agreement

Simply search for the member by typing their first 3 letters of their first and last name into the field and double click to select them.

This will link them once the membership sales has been completed and you can track any referrals campaigns that you run in the club.

Campaign Codes

Campaign codes will be used to apply any membership promotions that clubs are running at any given time, as well as apply a direct discount on the subscription e.g. waive a joining fee.

Campaign codes can be applied in the membership sale to apply a discount on a membership, as well as in the Front Desk when purchasing a POS product.

PLEASE NOTE: When entering a campaign code during the membership sale process ensure you enter the code before you select the membership type to ensure it applies correctly. Once you have applied the code you will notice a star next to the memberships which implies the discount has been applied.

New membership X Add +

SELECT PRODUCT

Person type PRIVATE Is referred Sydenham

TRIALS	FLEXI	18 MONTHS	12 MONTHS	6 MONTHS	3 MONTHS	<input checked="" type="radio"/> Rebated
FIIT30	PERSONAL TRAINING	REFORMER PILATES				<input type="radio"/> Recurring

Subscriptions (12 Months)

12 Month Fixed Term \$54.00	12 Month Ongoing \$54.00	12 Month PIF \$1200.00
--------------------------------	-----------------------------	---------------------------

To waive the joining fee on a sale

During the subscription sale process you will need to enter the campaign code **ZJF** to waive the joining fee.

ZJF10 – 10% discount off membership + zero joining fee

ZJF15 – 15% discount off membership + zero joining fee

For a full list of campaign codes refer to the Intranet on the Operations page > Exerp Training Manual

How to change the staff member who sold the membership

If you need to update who sold the membership after the sale has gone through – follow the below steps to update.

1. Go into the member's profile in Exerp > Summary tab > Sales List.

Tahlia Day

Summary Details Membership Journal Account Booking Relations Employee

INFO

Status	Active: member for 90 days (Carlton)
Accumulated membership	90 days
Person type	Staff
Deduction day	Thursday (Odd Weeks)

RECENT NOTES

22/04/2020 1:08 PM Note: Chatbot conversation

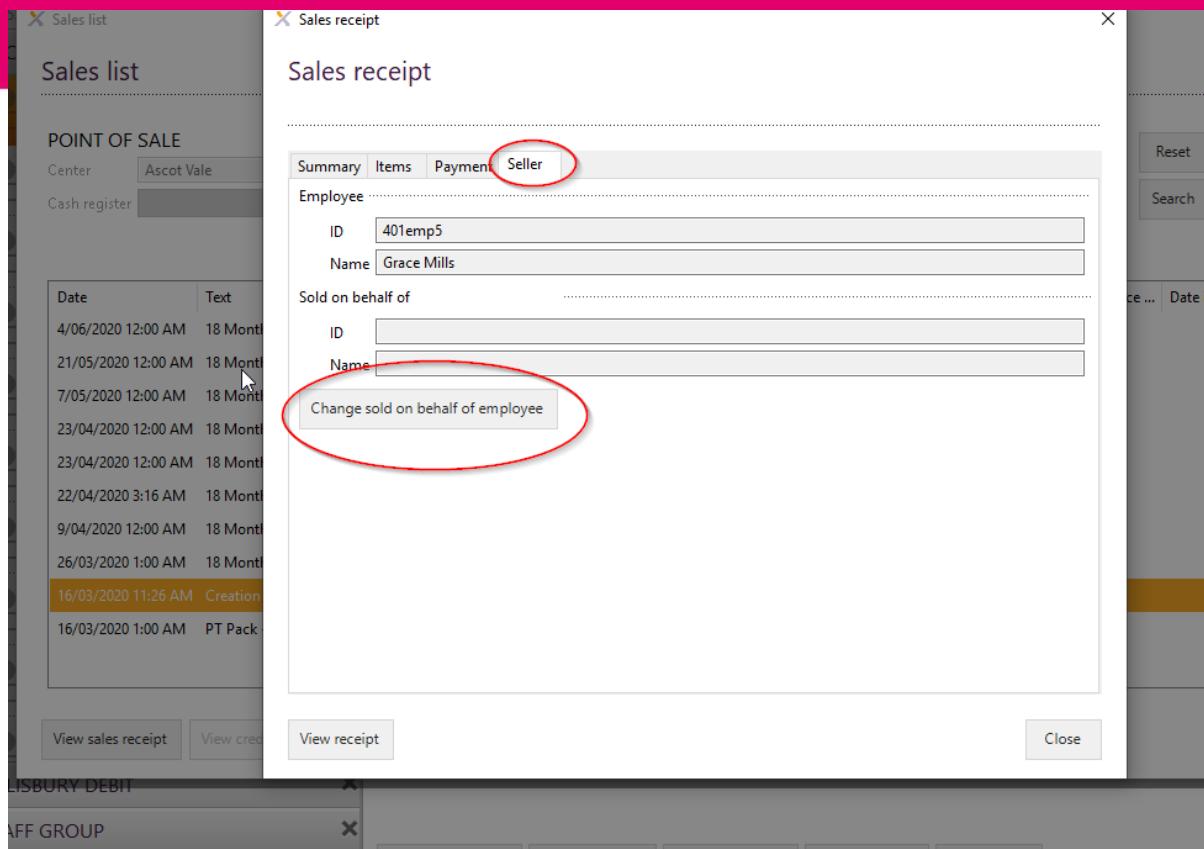
17/04/2020 9:57 AM Apply: Change person attribute: Extended attribute: false;myfernwood=Yes

30/03/2020 7:53 PM Apply: Export to 3rd party system: Select event hook: Recreate Person on Wellne...

[View all...](#)

Sales list

2. Find the Sales Line of **Creation 12 Month Ongoing** (or whatever the name of their membership type is) and open this sales line.
3. From here a new window should pop up > go to the Seller tab > Select Change sold on behalf of employee
4. Enter the name of the staff member and click Save.



Complimentary membership

Please note the default access to process a complimentary membership is club manager

Membership Sale App > Select Subscription length > Tick Paid in full > Select Complimentary subscription

SELECT PRODUCT

Princess Anne (Lead) - Private

PRIVATE

PERSON PROFILE

ENTER CAMPAIGN CODE

TRIALS	FLEXI	18 MONTHS	12 MONTHS	6 MONTHS	3 MONTHS	FIIT30
PERSONAL TRAINING	REFORMER PILATES					

Subscriptions (6 Months)

6 Month PIF \$525.00	6 Month Complimentary \$0.00
-------------------------	---------------------------------

Rebated
 Recurring
 Paid in full

6 Month Complimentary
 Price \$0.00
 Joining fee \$0.00

Total
 Joining fee \$0.00
 Full price \$0.00

Recurring Clip Cards

Adding on any session based services such as personal training, food coaching or FIIT30 to a member's direct debit. This will charge the member for the sessions with their membership payment and drop the sessions into their account each fortnight.

A recurring clip card subscription has to be processed after a member has a subscription.

How to process a recurring clip subscription.

Membership Sale App > Search for member > Select Recurring Clip Card > Select Service > Add the amount of sessions the member will do each fortnight

1. Click on the 'Membership sale' app in the menu bar
2. Search for the member by using the magnifying search glass in the top left hand side of the screen.



3. You will now see the member's name up the top in a new tab. Select the type of 'Clipcard' subscription the member would like to purchase (FIIT30, Personal Training or Reformer Pilates). Now click on the appropriate clip card below.

A screenshot of the 'SELECT PRODUCT' page for member 'Mary Smith'. At the top, there is a 'View membership' link, the member's name 'Mary Smith', and an 'Add +' button. Below this is a 'SELECT PRODUCT' section. A red arrow points to the 'Add +' button. The member is listed as 'Mary Smith (Lead) - Private'. To the right are buttons for 'PRIVATE', 'PERSON PROFILE', and 'ENTER CAMPAIGN CODE'. Below this is a row of service options: 'TRIALS', 'FLEXI', '18 MONTHS', '12 MONTHS', '6 MONTHS', '3 MONTHS', 'FIIT30' (which is highlighted in orange), and 'PERSONAL TRAINING' (also highlighted in orange). A red arrow points to the 'PERSONAL TRAINING' button. Further down, under 'Subscriptions (Personal Training)', there is a box for 'Personal Training Clip Card' priced at '\$40.00 per clip'.

4. You will now see a pop up screen to ask you how many clip cards you would like to add onto the members account on a fortnightly basis (1 personal training session per week is 2 clip cards a fortnight). Enter in amount of clip cards to add on and then select Ok.

Select recurring clipcard clips



Select clip card size. Must be between 1 and 12

Price: \$80.00



Ok

Cancel

5. You will now see on the right hand side of the screen the amount that will be added onto the direct debit. Once you are happy with the amount, click on 'Next' to continue in the bottom right hand side of the screen.

Personal Training Clip Card X
Price \$80.00/2 weeks
Joining fee \$0.00
Clips 2/2 weeks

Total

Joining fee \$0.00
Period Price \$80.00/2 weeks

BACK ⏪ **NEXT ⏩** ←

6. The next screen will show all personal details. Here you will enter in payment details if they haven't already been added in. Click on 'Next' to continue.

PERSONAL DETAILS

Gender	<input type="radio"/> Male <input checked="" type="radio"/> Female
First/last name	Mary Smith
Birth date	20/04/1989 d/MM/yyyy
Age	30
C/O name	
Address 1	47 Elizabeth Street
Address 2	
Postcode	3000 VIC MELBOURNE Australia
<input type="checkbox"/> Use different invoice address	
Mobile phone	+61 4 5678 9678 <input checked="" type="checkbox"/> Allow SMS
Home phone	
E-mail	mary.smith@gmail.com.au <input checked="" type="checkbox"/> Allow service messages
Preferred channel	None <input type="checkbox"/> Is accepting email newsletters <input type="checkbox"/> Is accepting third party offers

Who will pay?	<input checked="" type="radio"/> Person self (Mary Smith) <input type="radio"/> Search										
Payment agreement	<input checked="" type="radio"/> Create new agreement <input type="radio"/> Direct Debit										
How would Mary Smith like to pay ?											
Bank account	<table border="1"> <tr> <td>Account holder</td> <td>SMITH MARY</td> </tr> <tr> <td>Bank registration number</td> <td>923-100</td> </tr> <tr> <td>Bank account number</td> <td>123456</td> </tr> <tr> <td>Bank name</td> <td>ING Direct</td> </tr> <tr> <td>Bank extra info</td> <td>Level 28 60 Margaret Street Sydney NSW 2000</td> </tr> </table>	Account holder	SMITH MARY	Bank registration number	923-100	Bank account number	123456	Bank name	ING Direct	Bank extra info	Level 28 60 Margaret Street Sydney NSW 2000
Account holder	SMITH MARY										
Bank registration number	923-100										
Bank account number	123456										
Bank name	ING Direct										
Bank extra info	Level 28 60 Margaret Street Sydney NSW 2000										

✓ Select product Personal details Summary Signature

BACK NEXT

7. PLEASE NOTE: if the recurring clip card is processed in between a debit and the member wishes to book straight in for Personal Training that week the system will prompt you for an upfront payment for a session straight away.
 8. A summary screen will now pop up. Please ensure that all amounts are correct before proceeding. Click on Next to continue.

New membership Naomi - Personal Training Clip Card Add +

SUMMARY

Subscription

Subscription	Personal Training Clip Card
Clips / 2 weeks	2
Start date	9/01/2020
Price / 2 weeks	\$56.00
Add-on	\$0.00
Total / 2 weeks	\$56.00
Last date in binding period	22/01/2020

Initial payment

Administration fee	\$0.00
Joining fee	\$0.00
Total amount	\$0.00

First deduction for subscription

Amount	\$56.00
Deduction day	9/01/2020
Period	9/01/2020 - 22/01/2020

✓ Select product ✓ Personal details ✓ Questionnaire Summary Signature

BACK NEXT

[Putting your Recurring Clip Card on freeze](#)

When processing a freeze on a member's recurring clip card, you must process this any time before midnight the Tuesday before your debit run, otherwise the member will still be charged for this component and receive the clips from that week's debit.

[Processing a downgrade](#)

To remove a recurring clip card from a member's account, you will follow the same process as a cancellation of membership.

1. Go into the member's profile in Exerp > Membership tab
2. Select the Recurring Clip Card line item (will be highlighted in orange) > Select Stop.
3. Complete the details for their cancellation, keeping in mind the 14 days' notice period, members need to provide in downgrade
4. Select SAVE

This will trigger an automated email to the member advising them of their membership downgrade.

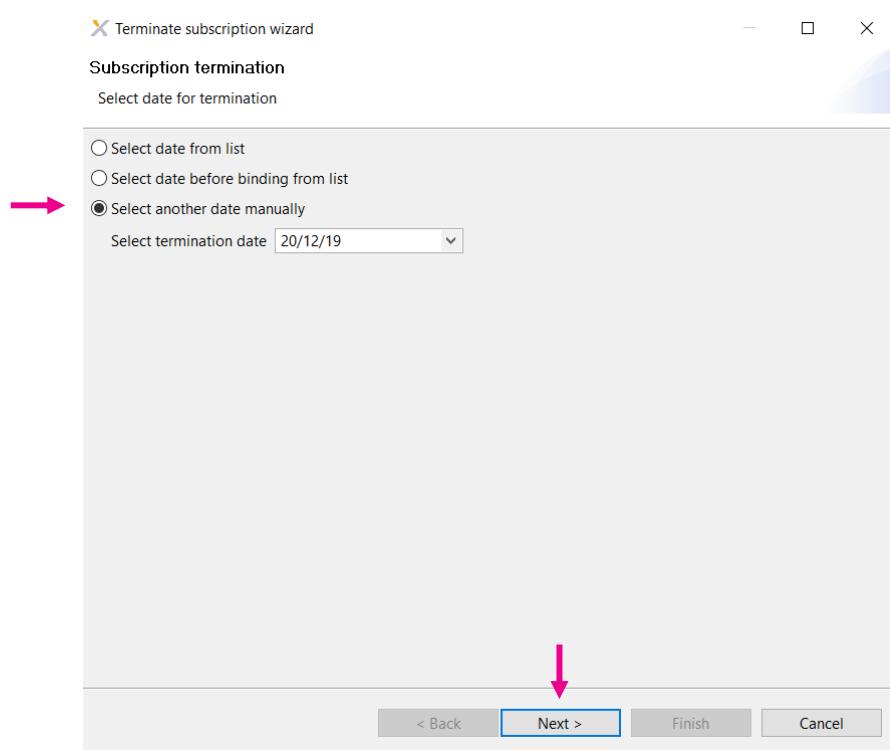
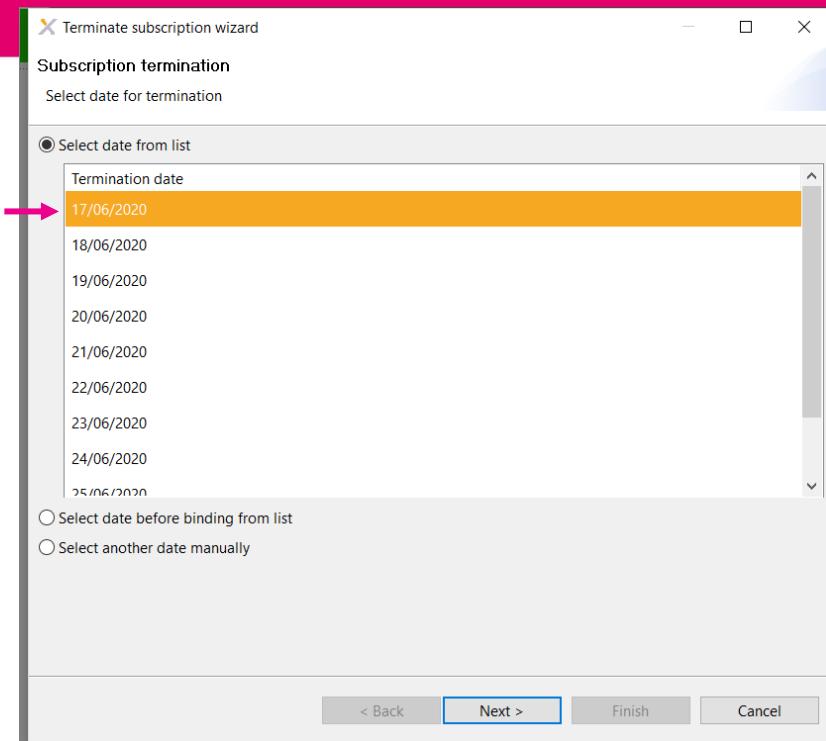
[Processing a membership cancellation](#)

[Stop Subscription](#)

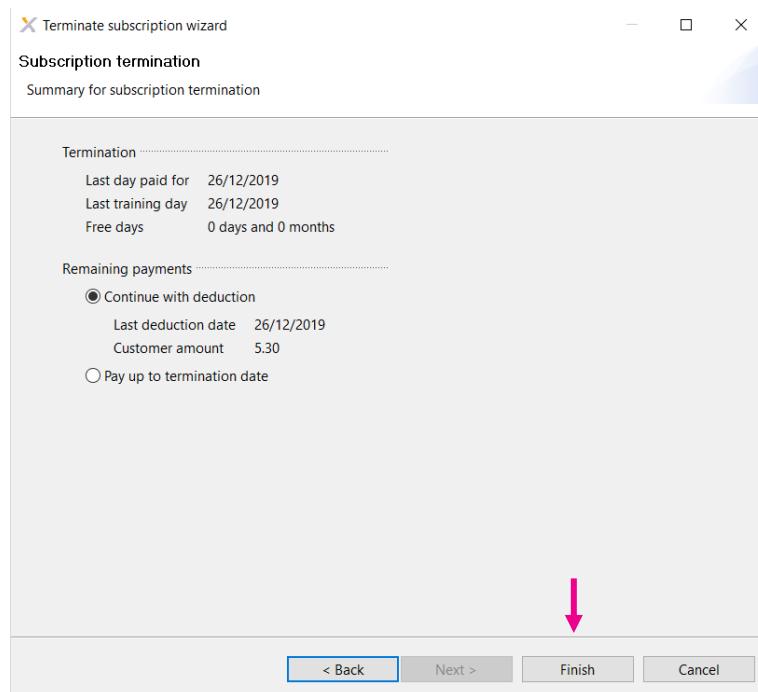
Club Manager Access & Club Member Admin access only

This will only ever be used when a member wishes to cancel their subscription outside their cooling off period.

1. Go into the member's profile
2. Membership tab > Subscriptions
3. Select their current subscription
4. Click the  button
5. Select the appropriate termination date by choosing a date from list or select another date manually (last day of access to the club)



6. You will see a summary of the members cancellation including last deduction date (direct debit date). Select finish to complete task.



Cancel Stop Membership

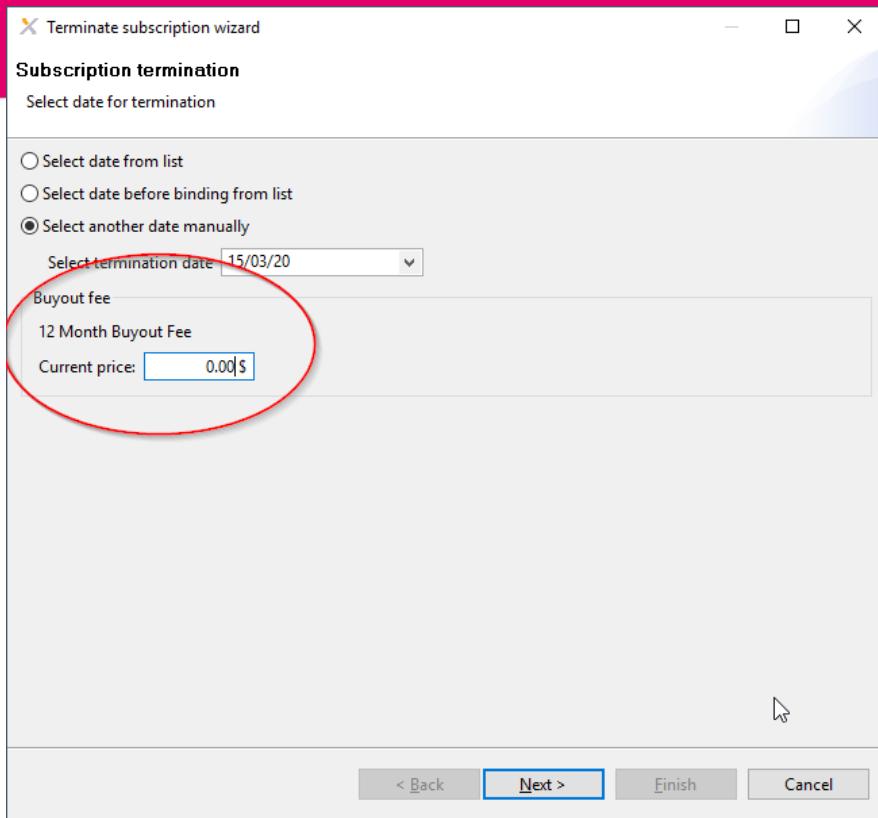
PLEASE NOTE: If the member changes their mind (which we hope they do!) and you need to cancel the cancellation, you will see in the same tab a button.

Splitting the cancellation fee over an instalment plan

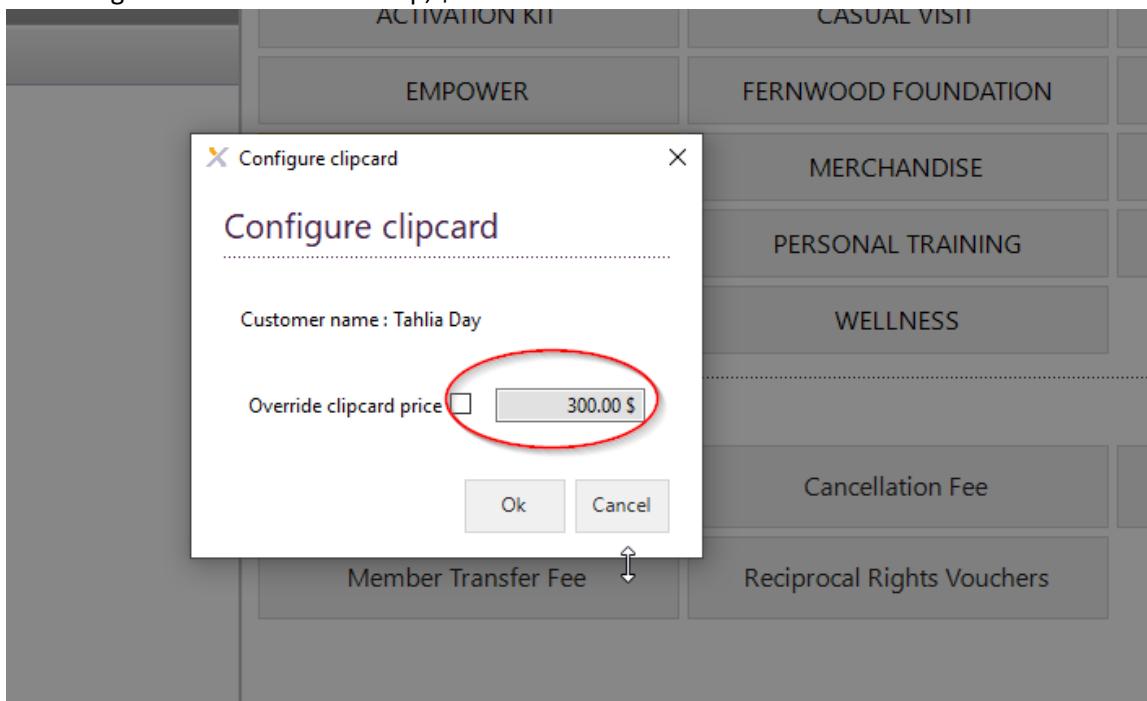
Club Manager Access & Club Member Admin access only

If a member cancels their membership within their binding period and needs to split their cancellation fee (buyout fee) over several direct debits, follow the steps below to process.

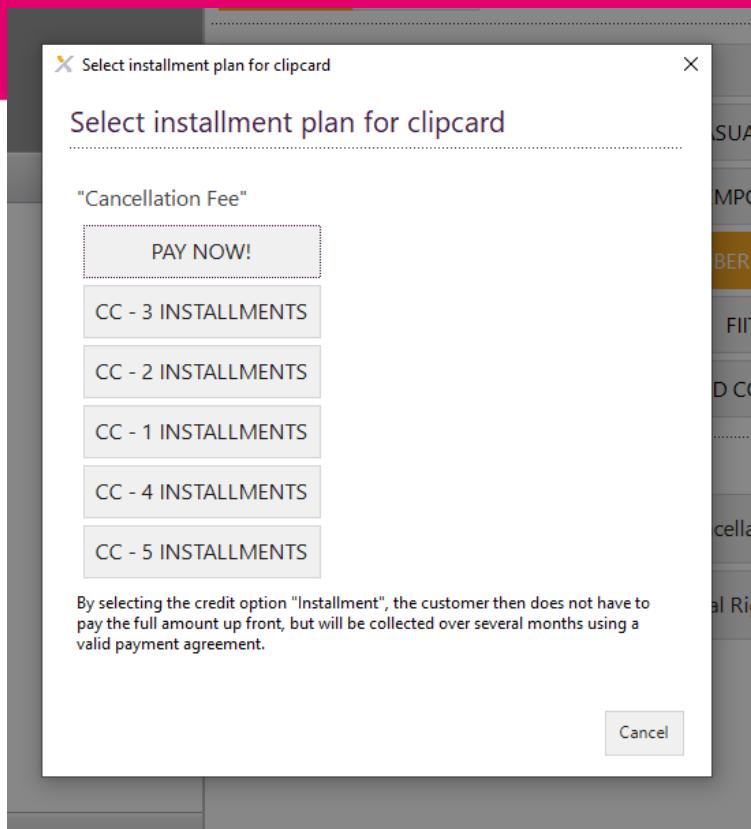
1. Process the membership cancellation as per the steps above under 'Processing a membership cancellation'
2. Change the buy out fee in the cancellation window to \$0.00



3. Complete the cancellation through the Terminate Subscription Wizard.
4. Open the Front Desk for that member
5. Select item “Cancellation Fee” under Membership Fees product group – override cancellation fee to the price the applies to that member i.e. change to \$200 if they are cancelling a 12 month membership, \$100 for a 6 month etc.



6. Select the instalment plan that applies to that member.



Missing payment agreement – alerts

Missing payment agreement is just a subscription that either has no banking details or credit card information linked to their account or they have incorrect banking details. If you have a member that signs into the club with this a missing payment agreement, it will prompt you on them signing in, you can click on the link “Missing Payment Agreement” and it will take you to their account screen where you can update this information.

Regret Subscription

Cancel in the cooling off period

Club Manager Access & Club Member Admin access only

This will only ever be used when a member wishes to cancel their subscription in their cooling off period of 48 hours.

1. Go into the member's profile
2. Membership tab > Subscriptions
3. Select their current subscription
4. Click the regret subscription button

PLEASE NOTE: after the 48 hours cooling off period has passed this button will automatically be disabled.

The screenshot shows a member profile for 'Tahlia Day'. The 'Membership' tab is active. Below the tabs, there are four buttons: 'Subscriptions' (highlighted in orange), 'Clip cards', 'Privileges', and 'Privilege usages'. The main area displays a table with the following data:

Name	Center	Status	Sub-state	Current pr...	Start	Stop	Bind. exp	Incl
12 Month Ongoing	Fernwood Ascot Vale	Active	None	0.00	11/03/2020		9/03/2021	

Below the table is a toolbar with the following buttons: View (eye icon), Change (gear icon), Edit members (gear icon), New add-on (+ icon), Prepay (gear icon), Reactivate, Regret sub. (button circled in red), Stop (trash bin icon), and Delete Subs. The 'Regret sub.' button is highlighted with a red oval.

At the bottom, there are three tabs: 'Freeze' (highlighted in orange), 'Free periods', and 'Blocked periods'. Below these tabs, it says 'Contractual 0 Unrestricted 0 No upcoming freeze'.

Before binding (contract is up) – cancellation fees will be applied

Select another date manually – this will bring up a calendar for you to manually select a date to end the membership.

Person App

Member IDs

In the member profile you will see in the right hand corner their Member IDs.



ID: 100p652
External ID: 658

ID: 100p652 – this is their unique member ID in Exerp that is linked to their club.

100 p 652

 Club ID Person type Unique member ID

External ID: Another unique ID that will never change against a person, even if they transfer to another club.

Old System Person ID: Members that have been migrated over from our legacy system (FCM) will show their old membership ID.

Person Types

Private: Selected for majority of new members and leads – no discount associated with this person type

Student: Student memberships have a pre-defined 10% discount on their membership fees and will be prompted to present their student card on joining. This can then also be scanned and stored under their profile for reference.

Senior: Student memberships have a pre-defined 10% discount on their membership fees and will be prompted to present their student card on joining. This can then also be scanned and stored under their profile for reference.

Corporate: If you have lots of local corporate deals in your club please log a helpdesk ticket (helpdesk@fernwoodfitness.com.au) and we can look into setting these up for the club with the pre-defined discount.

Staff: This is chosen for all employees within the club and when you are setting up a new staff member. Please refer to the Staff Member section of the Person App chapter for more information on setting up staff.

Staff will automatically receive a 30% discount on products and services in the club.

Person profile

Summary Tab

Provides a snap shot of the person's membership.

Jane Test

Summary Details Membership Journal Account Booking Relations

INFO

Status	Active: member for 1 days (Fernwood HQ)
Accumulated membership	1 days
Person type	Private
Mobile phone	+61 4 2344 5678
Binding period	Person is within binding period
Deduction day	Thursday (Even Weeks)



RECENT NOTES

[Today 13:14](#) Person created: The person has been created

ID: [100p652](#)
External ID: [658](#)

Send message  Create note  Create to-do  Create task  Sales list 

Status of the member – active or inactive and how long the person has been a member for
Active: A current paying member (includes members on deferral)

Inactive: A cancelled member

Accumulated membership – number of days they have been a member for

Person type – Whether the person is a private, senior, staff or student member

Mobile number – contact details

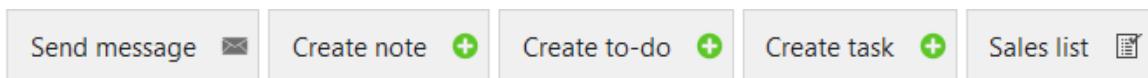
Binding period – snapshot of whether the member is inside or outside their binding period

Deduction day – their subscription payment cycle

[Create Journal Note](#)

Person Profile > Summary tab > Create note

1. Click on 'create note' to open journal document



2. Click on the dropdown menu to select the subject of journal document

Journal document

→

Subject	Freeze
	Cancellation
	Complaint
Details	Empower Program
	Fitness Coach Session
	FIIT30
	Food Coaching
Attachment	Freeze
	General Enquiry
	Group Fitness
	Payments & Rejections
	Personal Training
	Retention

3. Type the contact note in the details section.
4. Upload any assisting documentation with the journal note i.e. a medical certificate, health screen questionnaire etc.

Journal document

→

Subject	Freeze
Details	Requested a freeze for 4 weeks starting today. Request has been sent to NSO for processing.
Attachment	<input type="button" value="Browse"/> <input type="button" value="View"/> <input type="button" value="Print"/>
	<input type="button" value="Ok"/> <input type="button" value="Cancel"/>

Once you select OK the most recent contact note will appear under the summary tab of a members' profile

Summary

[Details](#)[Membership](#)[Journal](#)[Account](#)[Booking](#)[Relations](#)

INFO

Status	Active: member for 1 days (Fernwood HQ)
Accumulated membership	1 days
Person type	Private
Mobile phone	+61 0 4566 7890
Binding period	Person is within binding period
Future price changes for subscription	12 Month Ongoing will change price to 36.40 \$ on the 26/12/2019
Deduction day	Thursday (Even Weeks)

RECENT NOTES

[Today 09:40](#) Freeze: Requested a freeze for 4 weeks starting today

[Today 09:35](#) Person created: The person has been created

[View Previous Transactions for a Member](#)

Person Profile > Summary > Sales List

This screen will show the sales transactions that the member has made. Click on this to see a list of all transactions made under a subscription, to view the sales receipt, to cancel a sale (only club managers will have this access) or to re-print an invoice.

[Send message](#)[Create note](#)[Create to-do](#)[Create task](#)[Sales list](#)

Sales list

POINT OF SALE
 Center: Fernwood HQ
 Cash register:

PERIOD
 Date interval: Last 3 months
 From: 6/09/19
 To: 5/12/19

CUSTOMER
 Receipt:
 Person: Jane Test

Date	Text	Amount	Customer	Center	Sales rec...	Credit	Employee	Date printed	Fis...	Invoice r...	Date issued
5/12/2019 1:21 PM	Creation 12 Month Ongoing	175.00	100p652	Fernwoo...	100inv45		Naomi ...		No		

Printing off a POS receipt

To print off a PDF POS receipt for the members from any purchase they have made in club, this can be done from their profile under their Sales List.

Person profile > Summary tab > Sales List > Select transaction > View Sales receipt > View receipt > Print PDF.



Fernwood
Morayfield
ABN: 76 096 546 075
Mega Centre 379 Morayfield Road
MORAYFIELD
4508 AU
+61 7 5433 1187

Invoice #: 708inv12747
Club: Morayfield
Transaction date: 05/08/2020
Member: Hanna Markayla
Sales person: Mark Hanna
(100emp601)

Product Name	Qty	Item Disc	Total
Creation 12 Month Ongoing	1	\$ 0,00	\$ 199.00
Activation Kit	1	\$ 0,00	\$ 89.00
ProRata 12 Month Ongoing	1	\$ 0,00	\$ 3.32

* Prices include

TOTAL DISCOUNT	\$ 0.00
TOTAL GST	\$ 26.48
TOTAL (incl. GST)	\$ 291.32

Details Tab

Person Profile > Details tab

View a members' personal details and communication preferences.

Jane Test



Summary Details Membership Journal Account Booking Relations

MEMBER

Full name Jane Test
SSN
Sex Female
Birthday 15/03/1991
Age 28
No comment
Person type Private

ADDRESS

C/O name
Address 1 123 Victor Street
Address 2
Country Australia
Postcode 3000 VIC MELBOURNE



100p652
Fernwood HQ

[Invoice details](#)

COMMUNICATION

E-mail jane.t@gmail.com.au
Mobile phone +61 4 2344 5678
No home phone
No work phone

Accepted material:

Is accepting email newsletters
 Is accepting third party offers

Language Default
Preferred channel E-mail

[Edit](#)

[View extended attributes](#)

[Change photo](#)

[Set pincode](#)

[Set password](#)

[Member card](#)

[Transfer](#)

[Block/Blacklist/Suspend](#)

[Mark as duplicate](#)

[Delete](#)

Edit Member Details

1. *Personal Profile > Details tab > Edit*

[Edit](#)

[View extended attributes](#)

[Change photo](#)

[Set pincode](#)

[Set password](#)

[Member card](#)

[Transfer](#)

[Block/Blacklist/Suspend](#)

2. Make any necessary changes to personal details and click SAVE

Person Details

MEMBER

SSN:

Sex: Female

Birthday:

Age:

Comment:

Person type:

ADDRESS

Nick name:

First name:

Last name:

C/O name:

Address 1:

Address 2:

Country:

Postcode: VIC

[Invoice details](#)

COMMUNICATION

E-mail: <input type="text" value="jane.t@gmail.com.au"/>	Channels:	Accepted material:
Mobile phone: <input type="text" value="+61 4 2344 5678"/>	<input type="checkbox"/> Letter	<input type="checkbox"/> Is accepting email newsletters
Home phone: <input type="text"/>	<input checked="" type="checkbox"/> E-mail	<input type="checkbox"/> Is accepting third party offers
Work phone: <input type="text"/>	<input type="checkbox"/> Phone	
Language: <input type="text" value="Default"/>	<input checked="" type="checkbox"/> SMS	
	<input type="checkbox"/> App notification	
	<input type="checkbox"/> Charged SMS	
	Preferred channel:	
	<input type="text" value="E-mail"/>	

[Cancel](#) [Save](#)

Edit a person type from Private to Staff/Student

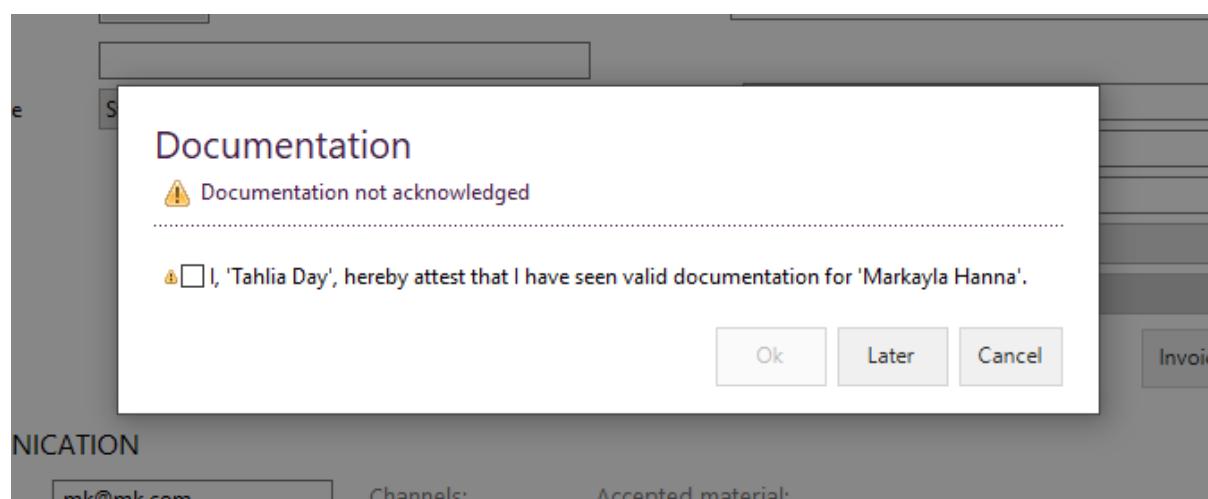
To update a member's person type from Private to a staff member or senior person type, simply go into their Person profile > Details and Edit.

In the person type drop down > select the person type you are needing to update their profile to and Click Save.

If you create a person type: Staff, this will update their profile in Exerp to include the Employee Tab.

PLEASE NOTE: If you change a person type to student or senior, it will adjust their membership rate to include the 10% standard discount that is applied to those members.

The system will also ask you to confirm that you have seen appropriate documentation for the student members – until this box is checked it will not apply the discount.



Extended Attributes

Person profile > Details > 'View extended attributes'

This section of the member profile is where you will need to add any additional information about the member.

- Lead Source (e.g. Walk-In, Social, Referral, Outreach)
- Emergency Contact Name
- Emergency Contact Number
- Preferred Personal Trainer
- Is 24/7?
- Whether or not the member is accepting email newsletters or if they are accepting third party offers

Edit Extended Attributes

1. Person Profile > Details > 'View extended attributes'



Extended attributes

Lead Source Select

Emergency Contact Name *

Emergency Contact Number *

Is accepting email newsletters *

Is accepting third party offers *

Edit Close

2. Click on edit, make appropriate changes and then click on 'Save'.

Extended attributes

Lead Source Walk In

Emergency Contact Name * Mary Poppins

Emergency Contact Number * 0411 111 111

Is accepting email newsletters *

Is accepting third party offers *

Edit Close

Extended attributes

Lead Source Walk In

Emergency Contact Name * Mary Poppins

Emergency Contact Number * 0411 111 111

Is accepting email newsletters *

Is accepting third party offers *

Cancel Save Close

Upload a Member Photo

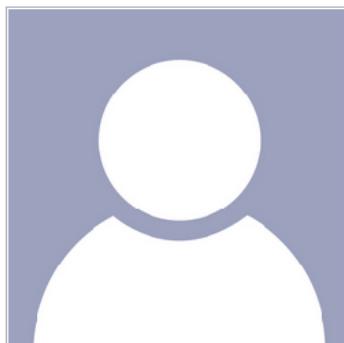
Change photo tab allows you to upload a new picture of the member. Make sure the camera is linked correctly to Exerp before selecting this option.

1. Click on 'Change photo'



2. Select 'Take picture' to take a new photo or select 'Upload picture'. Select OK to save photo

Take picture



Take picture

Upload picture

Ok

Cancel

Upload picture

Ok

Cancel



Set Password

The set password feature on the member's profile is linked through to their Fernwood account which gives them access to their Fernwood App and MyFernwood portal.

If you need to reset a member's password at any time to assist with their access, this can be done via their profile in Exerp.

Person profile > Details > Set password > change password & confirm new password > OK.

[Summary](#) [Details](#) [Membership](#) [Journal](#) [Account](#) [Booking](#) [Relations](#)

MEMBER

Full name **Markayla Hanna**
SSN
Sex **Female**
Birthday **1/01/1980**
Age **40**
No comment
Person type **Private**

ADDRESS

C/O name
Address 1 **45**
Address 2
Country **Australia**
Postcode **3000 VIC MELBOURNE**



708p8602
Morayfield

[Invoice details](#)

COMMUNICATION

E-mail **mk@mk.com**
No mobile phone
No home phone
No work phone

Accepted material:
 Email Marketing
 Phone Marketing
 SMS Marketing

Language **Default**
Preferred channel **No channel**

[Edit](#) [View extended attributes](#) [Change photo](#) [Set pincode](#) [Set password](#) [Member card](#) [Transfer](#) [Mark as duplicate](#) [Delete](#)

[Block/Blacklist/Suspend](#)

Member card

If you wish to assign a new member card to a member follow the steps below.

1. Click on 'Member card'



[Edit](#) [View extended attributes](#) [Change photo](#) [Set pincode](#) [Set password](#) [Member card](#) [Transfer](#) [Block/Blacklist/Suspend](#)

2. Enter in relevant information in the 'member card administration' pop up page and program a new swipe card for the member

Member card administration

Assign new card

If you wish to assign a new card to the member, just swipe the card now.

Card type [Barcode](#) Card ID Save

Return member card

If you wish to return members card, swipe the active card now.

Registered member cards

Show blocked

Start date	Stop date	ID	Card type	Status	Employee ID
5/12/2019		1	Barcode	Ok	Naomi Mik...

[Block](#)

[Close](#)

Block/Blacklist/Suspend a Member

NSO Member Admin access only.

Block: Blocks a members access to the gym due to debt or other specified reason by a club manager or senior management.

If the member's payment keep rejecting, club managers will be able to click on this button, so that an alert will pop up on the member profile when they scan in at reception for a visit explaining that they have been blocked from using the facilities until payment is made.

Duplicate Checks

Mark as duplicate tab – Club Manager access only.

Exerp has the ability to pick up on duplicates when a lead is created. A duplicate will either be a soft or a hard duplicate check in Exerp.

Soft duplicate check: can be overridden - for example if a mum and daughter join and decide to use the same email address, the duplicate warning will pop up when entering the email address in for the second time. You will be able to override this to state that there is two different members using the same email address and the daughter is a minor.

Hard duplicate check: The hard duplicate check will not allow you to override the details. For example if all details (first name, last name, DOB & mobile) match a person that is already in Exerp you will not be able to override this and will have to use the same member profile. This will only be the case if you are entering in the same person twice.

Only use this 'mark as duplicate' button if there are accidentally two records for the same person in Exerp that the duplicate check didn't pick up when entering the person in the first time.

Transfer Membership – Club-to-Club

- Nothing is required to be done by the original club (if a member comes to you to transfer out of your club, please direct her to go to the new club to look around and initiate the process from that club)
- All transfers must be initiated by the member at her new home club
- The new home club must discuss all fees with member and have her complete the following paperwork:
 - Manual Membership Agreement
 - Direct Debit Request
- Send all paperwork to your club administrator at NSO (if your administration is not processed by NSO please send this to membershipadmin@fernwoodfitness.com.au)
- NSO will then perform the transfer between clubs within Exerp on your behalf
 - You will be notified of any Clip Cards that the member may have which will be transferred to your club (for your purposes of invoicing the original home club for these sessions)
 - The original home club will also be notified of the transfer

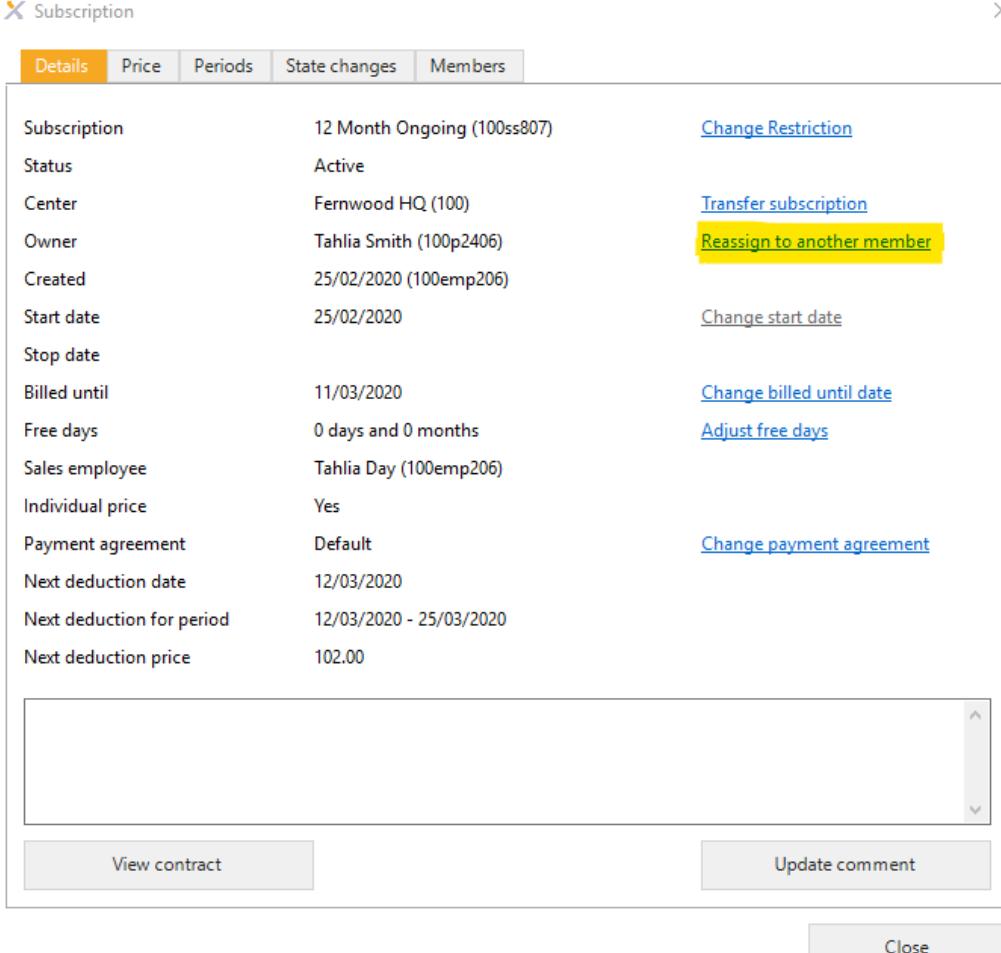
Transfer – Member-to-Member

Create a new lead in Exerp for the incoming member > Set them up with a payment agreement > Search for the current member > Person Profile > Membership Tab > Select membership > View > Assign to new member.

PLEASE NOTE: When you are processing a member to member transfer, you must enter the new incoming member into the system as a lead with a payment agreement (valid payment details) before you can action the transfer.

1. Person App > Search for existing member who wishes to transfer the membership

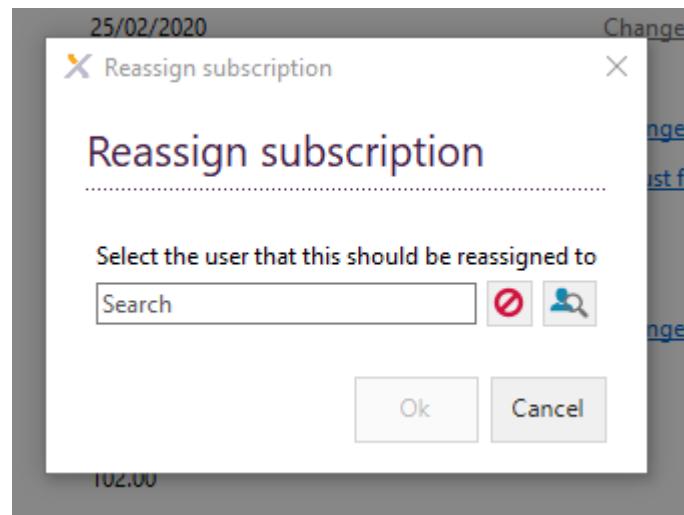
2. Go to their membership tab > Subscriptions and select the membership they are wanting to transfer > Click View
3. The below window will pop up > Select the *Reassign to another member* button

A screenshot of a software window titled "Subscription". The window has a header with tabs: Details (highlighted in orange), Price, Periods, State changes, and Members. Below the tabs is a table of subscription details. A yellow box highlights the "Reassign to another member" link under the "Owner" row. At the bottom are buttons for "View contract", "Update comment", and "Close".

Subscription	12 Month Ongoing (100ss807)	Change Restriction
Status	Active	
Center	Fernwood HQ (100)	Transfer subscription
Owner	Tahlia Smith (100p2406)	Reassign to another member
Created	25/02/2020 (100emp206)	
Start date	25/02/2020	Change start date
Stop date		
Billed until	11/03/2020	Change billed until date
Free days	0 days and 0 months	Adjust free days
Sales employee	Tahlia Day (100emp206)	
Individual price	Yes	
Payment agreement	Default	Change payment agreement
Next deduction date	12/03/2020	
Next deduction for period	12/03/2020 - 25/03/2020	
Next deduction price	102.00	

[View contract](#) [Update comment](#) [Close](#)

4. Search for the member you are wanting to transfer the membership to.



5. The membership transfer has been completed.

Subscription	12 Month Ongoing (100ss807)	Change Restriction
Status	Active	
Center	Fernwood HQ (100)	Transfer subscription
Owner	Tahlia Smith (100p2406)	Reassign to another member
Created	25/02/2020 (100emp206)	
Start date	25/02/2020	Change start date
Stop date		
Billed until		
Free days		
Sales emplo		
Individual p		
Payment ag		
Next deduction date	12/03/2020	
Next deduction for period	12/03/2020 - 25/03/2020	
Next deduction price	102.00	

Create a payment agreement for a lead

Create lead > Personal profile > Account tab > Payment Agreement > New

1. Ensure the lead is entered in Exerp
2. Person tab > Search for the lead and pull up their person profile.
3. Go to the Account tab > Payment Agreement > Add

Hanna Cup

Summary Details Membership Journal Account Booking Relations

Account information Payment Agreement Payment Requests Settlements Gift cards

PAYMENT AGREEMENTS

Other payer Search

D.. ID Clearinghouse Bank account/Car... Card token Expiry date Ref. Status Individual deduct... Max. ded...

LOG I PAY EFT FOR THESE PEOPLE:

Entry date	Date	Status	Text	File ID	Employ...	Name	Club

Add Replace Edit View Use as Default Cancel Failed

4. Follow the steps to enter their banking details by selecting either EFT (Bank account) or Credit Card

New payment agreement

Select agreement type

- EFT (Fernwood DD)
- Invoice (FF_INVOICE)
- Credit card (Fernwood CC)

Membership Tab

Person Profile > Membership

The ‘membership tab’ will show the following details:

Subscription tab

Summary of the members past, current and future subscriptions.

- Name – type of subscription the member has
- Centre – member’s home club
- Status - status of their subscription i.e. frozen, active etc.
- Sub-state – provides further details on the member’s status i.e. blocked or frozen (none = active)
- Current Price – current fortnightly membership amount
- Start – start date of that subscription
- Stop – will have their cancellation date if applicable
- Bind. Exp – binding period
- Billed until – the date their current direct debit is paid until



Summary Details Membership Journal Account Booking Relations

Subscriptions Clip cards Privileges Privilege usages Include inactive

Flexi Membership: Frozen

Name	Center	Status	Sub-state	Current ...	Start	Stop	Bind. exp	Billed un...
Flexi Membership	Fernwood HQ	Frozen	None	60.00	5/12/20...		1/01/20...	11/12/2...
L... FIIT30 Flexi	Fernwood HQ	Frozen		50.00	5/12/20...			

View **Change** **Edit members** **New add-on** **Prepay**

Reactivate **Regret sub.** **Stop** **Delete Subscription**

To view more detail on a specific subscription:

1. Click on 'View' tab

Summary Details Membership Journal Account Booking Relations

Subscriptions Clip cards Privileges Privilege usages Include inactive

Flexi Membership: Frozen

Name	Center	Status	Sub-state	Current ...	Start	Stop	Bind. exp	Billed un...
Flexi Membership	Fernwood HQ	Frozen	None	60.00	5/12/20...		1/01/20...	11/12/2...
L... FIIT30 Flexi	Fernwood HQ	Frozen		50.00	5/12/20...			



View **Change** **Edit members** **New add-on** **Prepay**

Reactivate **Regret sub.** **Stop** **Delete Subscription**

To make a price adjustment/banking variation to a member's account

If you need to make an ongoing pricing adjustment to a member's account or a banking variation, this can be done through the member's profile – following the steps below.

Person Profile > Membership tab > Select the membership you wish to update so it is highlighted in orange > View > Price tab > Add > Change the price > check the date this is going to be effective from and adjust if required > Add a comment/reason for the change > OK > View the new price change > Close.

1. Go to the member's profile in Exerp > membership tab and select the membership you are wanting to update so that it is highlighted in orange.
2. Click on View

Beth Randolph

Summary Details Membership Journal Account Booking Relations

Subscriptions Clip cards Privileges Privilege usages Include inactive

Name	Center	Status	Sub-state	Current pr...	Start	Stop	Bind. exp	Billed until
12 Month Ongoing	Fernwood Belconnen	Active	None	40.00	28/09/2019		16/12/2020	12/08/2020

View **Change** **Edit members** **New add-on** **Prepay**

Reactivate Regret sub. Stop Delete Subscription

3. A new window will pop up > select the Price tab along the top. Click on Add down the bottom of the window to add a new price to the membership.

Subscription

Details **Price** Periods State changes Members

Current

Price **Change**

Price update excluded

From date

Binding period

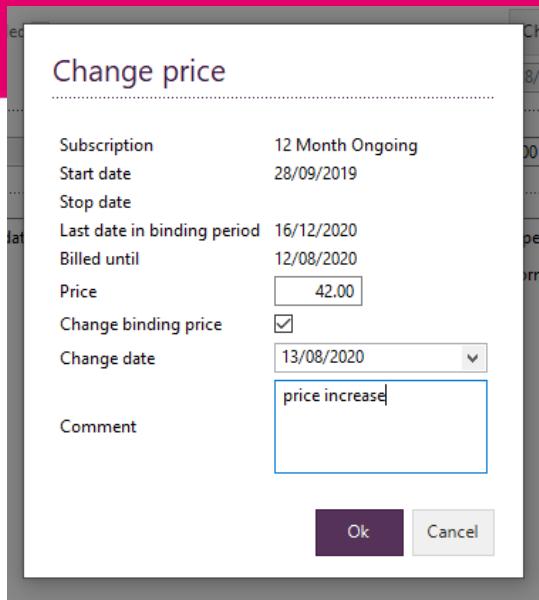
Stop date **Change** Remaining Contract Value

Prices

From date	To date	Binding	Price	Employee	Comment	Type	State
28/09/...		✓	40.00	Exerp Ad...		Normal	Applied

Add **Approve** **Delete** **Close**

4. This will bring up a new window where you can adjust the price of the membership and update the date it will take effect from. This will default to the next scheduled direct debit. Enter in a reason for the update for record and click OK.



PLEASE NOTE: If you are making an adjustment for a set period of time i.e. 5 direct debits you MUST add in a second price change to bring the rate back down to the membership fee. This feature is designed for ongoing membership price changes not instalments.

To make changes to a subscription

Club Manager Access Only

Person Profile > Membership > Subscriptions > Select Subscription > View

Once you open the view details tab, you will notice the underlined blue tabs on the right hand side of the pop up screen. These blue tabs allow you to make changes to the type of subscription i.e. change billed until date, adjust free days (if a member receive two weeks free for joining) or change payment agreement – to update payment details.

Details			Price	Periods	State changes	Members
Subscription	12 Month Ongoing (100ss28)			Change Restriction		
Status	Active			Transfer subscription		
Center	Fernwood HQ (100)			Reassign to another member		
Owner	Jane Test (100p652)					
Created	5/12/2019 (100emp603)					
Start date	5/12/2019			Change start date		
Stop date						
Billed until	11/12/2019			Change billed until date		
Free days	0 days and 0 months			Adjust free days		
Sales employee	Naomi Mikic (100emp603)					
Individual price	Yes					
Payment agreement	Default			Change payment agreement		
Next deduction date	12/12/2019					
Next deduction for period	12/12/2019 - 25/12/2019					
Next deduction price	52.00					
<div style="border: 1px solid #ccc; height: 100px; margin-top: 10px;"></div>						
View contract		Update comment				
Close						

Change tab

The change tab gives you access to upgrade or downgrade the person's subscription.

The change tab gives you access to change the type of subscription the member is on. For example if a member was on a 3 month membership but wanted to upgrade to the 12 month membership to reduce their membership rate this is where we can process this request.

Upgrade

Refers to increasing their membership term i.e. jumping from a 3 month membership to a 12 month membership.

Downgrade

Refers to decreasing their membership term i.e. jumping from a 12 month membership to a 3 month membership. This will only be able to be processed by Club Managers and if a member is in their minimum term they will also face the usual membership cancellation fees.

To upgrade or downgrade a subscription follow these steps:

1. Click on 'Change' tab

Subscriptions Clip cards Privileges Privilege usages

Name	Center
12 Month Ongoing	Fernwood HQ

↓

View Change Edit members New add-on Prepay

Freeze Free periods Blocked periods

2. Click on upgrade or downgrade depending on what you are wanting to process

Select upgrade/downgrade

Select the subscription the customer wishes to upgrade/downgrade to



Campaign code Set

Upgrades Downgrades Renew binding period Show only discounted

Start date

Name	Custom...	Rebate type	Campai...	Price period
Empower Non Member	399.00	Upgrade		
Flexi Membership	60.00	Upgrade		
3 Month Fixed Term	58.00	Upgrade		
3 Month Ongoing	58.00	Upgrade		
6 Month Fixed Term	56.00	Upgrade		
6 Month Ongoing	56.00	Upgrade		

↓

< Back Next > Finish Cancel

3. Select the name of upgrade or downgrade you would like to process. Click on 'Next'

- 4.

Select upgrade/downgrade

Select the subscription the customer wishes to upgrade/downgrade to

Campaign code

Set 

Upgrades

Downgrades

Renew binding period

Show only discounted

Start date

Name	Custom...	Rebate type	Campai...	Price period
Empower Non Member	399.00	Upgrade		
Flexi Membership	60.00	Upgrade		
3 Month Fixed Term	58.00	Upgrade		
3 Month Ongoing	58.00	Upgrade		
6 Month Fixed Term	56.00	Upgrade		
6 Month Ongoing	56.00	Upgrade		



< Back

Next >

Finish

Cancel

Override upgrade/downgrade price

If necessary, the price of the upgraded/downgraded subscription and change fee can be updated here

Customer price

60.00 \$

Change 

Normal price is \$60.00.

Change Fee

0.00 \$

Change 

Normal price is \$0.00.

< Back

Next >

Finish

Cancel

- Now select the add-ons that you would like to include in the upgrade. (add-ons are unlimited flexi components). Click 'Next' to continue.

Select add-ons

Select add-ons for subscription

Filter by product groups

All

FIIT30 Flexi

Price: \$50.00/2 weeks

Reformer Pilates Flexi

Price: \$50.00/2 weeks

Wellness Flexi

Price: \$50.00/2 weeks

Wellness Wednesdays

Price: \$18.00/2 weeks

Childcare 1 Child

Price: \$30.00/2 weeks



< Back

Next >

Finish

Cancel

6. The next page will show you what the member needs to pay to finish the upgrade/downgrade process and it will also give you a summary about the upgrade/downgrade.

PLEASE NOTE: Exerp calculates everything by a day by day pro-rata. For example if the member changes their membership from a 12 month to a flexi membership, as the rate is higher the system will calculate a pro-rata that would allow them to start accessing the club as a flexi member from the day of processing.

Pay upgrade/downgrade

Pay for the upgrade/downgrade

New extended binding period until 18/12/2019

Amount to pay: \$4.00

How would the customer like to pay for the change?

Amount remaining: \$4.00

Payments

Means of payment:

Amount:

Cash	
------	--

Cash account	
--------------	--

Remaining: 4.00

Pay

Credit card	
-------------	--

Payment account	
-----------------	--

Cancel

Other	
-------	--

Gift card	
-----------	--

Remaining: 4.00

< Back

Next >

Finish

Cancel

7. Now select 'Pay' and then 'Finish'.

Pay upgrade/downgrade

Pay for the upgrade/downgrade

New extended binding period until 18/12/2019

Amount to pay: \$4.00

How would the customer like to pay for the change?

Amount remaining: \$4.00

Payments

Means of payment:

Amount:

Cash	
------	--

Cash account	
--------------	--

4.00

Pay

Credit card	
-------------	--

Payment account	
-----------------	--

Cancel

Other	
-------	--

Gift card	
-----------	--

Remaining: 4.00

New Add On

An Add-on is a service that is added to the member's payment agreement on a fortnightly ongoing basis (unlimited flexi component) as a separate subscription.

To process an add-on new subscription under a **member's profile**, follows these steps.

1. Click on 'New Add-on' tab

Jane Test



Name	Center	Status	Sub-state	Current ...	Start	Stop	Bind. exp	Billed un...
12 Month Ongoing	Fernwood HQ	Active	None	52.00	5/12/20...		2/12/20...	11/12/2...

↓

View Change Edit members New add-on Prepay

Reactivate Regret sub. Stop Delete Subscription

2. Select the start date of the add-on followed by what type of service you would like to add-on i.e. FIIT30, Reformer Pilates
3. Click 'OK' to continue.

Add-on assignment

Settings → Start date 5/12/19

Select add-on products

Filter by product groups → All

FIIT30 Flexi —————
Price: \$50.00/2 weeks

Reformer Pilates Flexi —————
Price: \$50.00/2 weeks

Wellness Flexi —————
Price: \$50.00/2 weeks

Wellness Wednesdays —————
Price: \$18.00/2 weeks

Childcare 1 Child —————
Price: \$30.00/2 weeks

↓

Ok **Cancel**

4. The cash register will pop up and you will be able to select how the member will be paying for it.
If the upgrade start date occurs in between debits, the system will calculate the pro-rata and prompt the member to pay for this, it is assuming that as they start today, they wish to start using the service today i.e. FIIT30 which means they should also be paying for it from that date.
The amount the pops up can be pushed straight through to their next DD by selecting the Payment Account option in Front Desk.

PLEASE NOTE: If the member wishes to push the payment to their next direct debit just click on 'Other payments' to add it to the members' payment account (direct debit).

PRODUCTS ACTIVITIES

UNPARK SALES MENU

FREQUENT PRODUCTS

Search

ACTIVATION KIT

CELL IQ

CHILDCARE

FOOD & DRINK

FOOD COACHING

MASTER PERSONAL
TRAINING

MEMBERSHIP FEES

MERCHANDISE

REFORMER PILATES

FIIT30

PERSONAL TRAINING

WELLNESS

Products (Frequent products)

Activation Kit

Member Transfer Fee

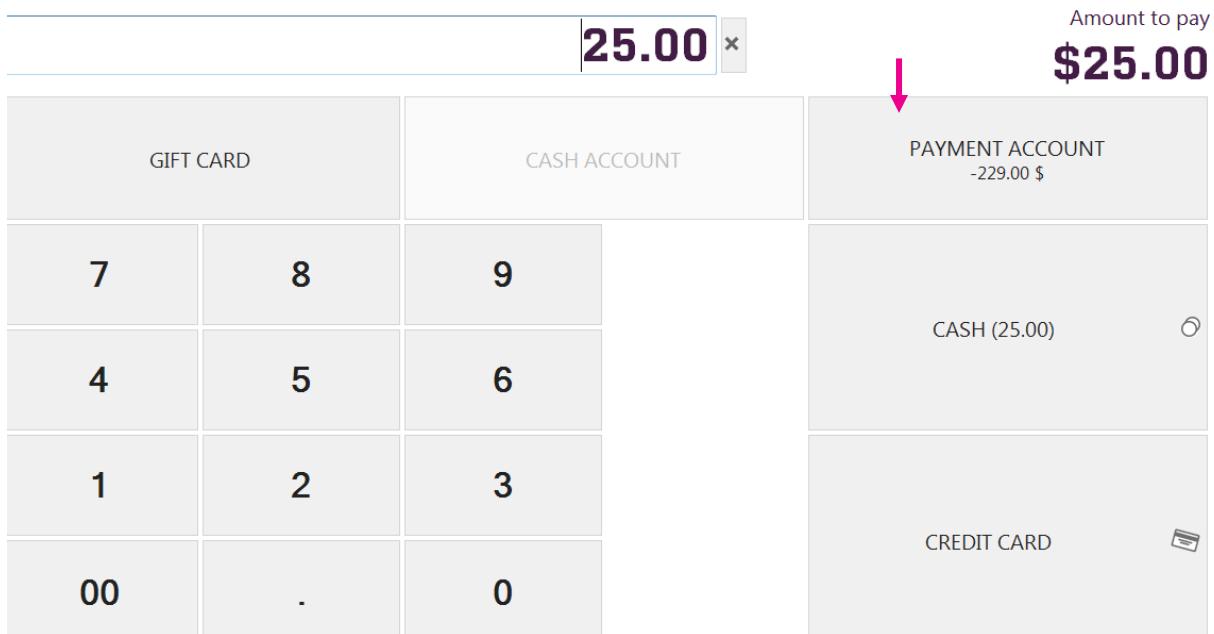
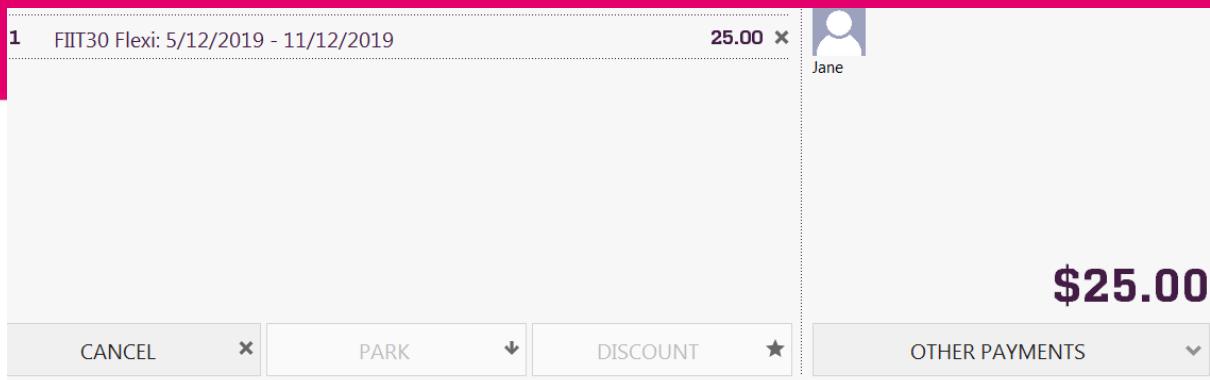
1 FIIT30 Flexi: 5/12/2019 - 11/12/2019 **25.00** **x**

\$25.00

Jane

CARD (25.00) CASH (25.00)

CANCEL X PARK DISCOUNT ★ OTHER PAYMENTS ^



Once the add-on is complete, you will now see two subscriptions under the membership tab, under subscriptions.

Jane Test

Summary Details **Membership** Journal Account Booking Relations

Subscriptions Clip cards Privileges Privilege usages

Name	Center	Status	Sub-state	Current ...	Start	Stop	Bind. exp	Billed un...
Flexi Membership	Fernwood HQ	Active	None	60.00	5/12/20...		18/12/2...	11/12/2...
└ FIIT30 Flexi	Fernwood HQ	Active		50.00	5/12/20...			

View Change Edit members New add-on Prepay Reactivate Regret sub. Stop Delete Subscription

Freeze Free periods Blocked periods

Contractual 0 Unrestricted 0 No upcoming freeze

Include old Include cancelled

Start date	Stop date	Days	Entry time	Comment	Type	Created	Created by

Create Edit Cancel Stop

Remove Add On – Downgrade a membership

Membership > Subscription > Select your Add On > STOP > Select Stop date > Finish

Jane Smith

Summary Details **Membership** Journal Account Booking Relations

Subscriptions Clip cards Privileges Privilege usages

Name	Center	Status	Sub-state	Current ...	Start	Stop	Bind. exp	Billed un...
12 Month Ongoing	Fernwood HQ	Active	None	36.40	19/12/2...		16/12/2...	25/12/2...
└ FIIT30 Flexi	Fernwood HQ	Active		50.00	2/01/20...			

View Change Edit members New add-on Prepay Reactivate Regret sub. **Stop** Delete Subscription

1. The 'Addon termination' screen will pop up. Select the date from the list or select the date manually of when you would like to stop the add on from. Now select 'Finish'.

Addon termination

Select from list

Date	In binding peri...
16/12/2020	
17/12/2020	
18/12/2020	
19/12/2020	
20/12/2020	
21/12/2020	
22/12/2020	
23/12/2020	

Show dates inside binding period

Select manually

Finish Cancel

Freeze tab

Previously known as a deferral, member have the ability to ‘freeze’ their subscriptions for \$8.00 per fortnight.

Unrestricted freeze: this type of freeze can only be processed by staff with **Club Manager** access or above and is only used for medical reasons or approved freezes.

Contractual freeze: this is the freeze that is pre-defined in all the subscriptions and be processed for a minimum of 2 weeks and maximum of 8 weeks, as per the terms and conditions of the membership agreement and will incur an \$8.00 a fortnight freeze fee.

Processing a Freeze

Membership > Freeze > Create >Select freeze type> Select dates > OK

1. Click on ‘freeze’

Freeze	Free periods	Blocked periods		
Contractual	0	Unrestricted 0 No upcoming freeze		
Start date	Stop date	Days	Entry time	Comment

2. Click on ‘Create’



3. Select the type of freeze the person requires.

PLEASE NOTE: this will only display both options if your access level allows

Freeze

No end date

Type

Dur

Type: Contractual

Contractual
Unrestricted

A dropdown menu labeled 'Type' is open, showing two options: 'Contractual' and 'Unrestricted'. The 'Contractual' option is currently selected. A tooltip or placeholder text 'Dur' is visible to the left of the dropdown.

4. Enter in the start date of the freeze followed by the stop date. All of the details of the freeze will be shown down the bottom. Now select 'OK' to proceed.

Freeze

 No end date

Type

Duration

→ Start date

Duration

→ Stop date 

Min. duration 2 weeks

Max. duration 40 weeks

Price

Start price Free

Period price \$8.00 every 2 weeks



5. Once you select OK the 'freeze' will save.
6. The freeze will now be displayed under the membership tab of the members' profile and under the freeze section.

PLEASE NOTE: Members will receive an auto email, confirming that the freeze has been processed for them including their dates of their freeze.

UPDATE TO FERNWOOD FREEZE: You may notice when you have processed a freeze for members that it will process the deferral fee based off a pro-rata amount

Name	Center	Status	Sub-state	Current ...	Start	Stop	Bind. exp	Billed un...
Flexi Membership	Fernwood HQ	Frozen	None	60.00	5/12/20...		1/01/20...	11/12/2...
└ FIIT30 Flexi	Fernwood HQ	Frozen		50.00	5/12/20...			

View Change Edit members New add-on Prepay Reactivate Regret sub. Stop Delete Subscription

Freeze Free periods Blocked periods

Contractual 9 Unrestricted 0 Next freeze is from 5/12/2019 to 18/12/2019 Include old Include cancelled

Start date	Stop date	Days	Entry time	Comment	Type	Created	Created by
5/12/2019	18/12/2019	14	5/12/2019 8:11 ...		Contractual	Staff	Naomi Mikic

To make changes to the freeze:

Membership > Freeze > Select freeze > Edit

1. Click on the 'Edit' tab down the bottom of the screen



Create	Edit	Cancel	Stop
--------	-------------	--------	------

2. Re-enter the correct dates in the 'Freeze' pop up screen and then select 'Ok' to save freeze.

Freeze

Type
Contractual

Duration
Start date 5/12/19
Duration
Stop date 18/12/19

Min. duration 2 weeks
Max. duration 40 weeks

Price
Start price Free
Period price \$8.00 every 2 weeks

Ok Cancel

Updated freeze details will now be displayed under the 'Freeze' tab in in the membership details page.

Returning early from a freeze

If a member would like to return early from their freeze:

Membership > Freeze > Select freeze > Stop

1. Click on the 'Stop' button down the bottom of the screen under the 'Freeze' tab.



The freeze will automatically be stopped.

If a member decides to return to the club early before their freeze has finished and you 'stop' their freeze, their debit amount will have a pro-rata amount added to it. For example if a member freezes their membership for 4 weeks and returns after 3 weeks, Exerp will automatically calculate the pro-rata for the remaining week and add the extra payment amount to their next direct debit to cover the cost of returning early to the club.

Free Periods

Club Manager access only

A free period is given for referring a friend, signing up on a subscription with a promotion deal (2 weeks free) or winning a competition that has been run in club – 30 days free.

Membership > Free Periods > Assign free period > Enter details > OK

1. Click on 'Free periods'

Freeze Free periods Blocked periods

Free days: 0 Free months: 0 No upcoming free periods

Include old Include cancelled

Start date	Stop date	Days	Entry time	Comment	Type	Created by
------------	-----------	------	------------	---------	------	------------

Use saved free days Assign free period Cancel

2. Click on 'Assign free period'.

Use saved free days Assign free period Cancel

3. Enter in the start date and stop date of the free period in the 'Assign free period' pop up screen. Click on OK after you have entered in the details.

Assign free period

Subscription

Name 12 Month Ongoing
 Start date 5/12/2019
 Stop date
 Billed until 11/12/2019

Duration

Start date 5/12/19
 Stop date 18/12/19
 Days 14

Note

Text

2 weeks free for referring a friend - Mary Jones

Ok Cancel




4. The details of the 'Free period' will appear under the 'Free periods' tab in the member profile.

Freeze Free periods Blocked periods

Free days 0 Free months 0 Next free period is from 5/1/2019

Include old Include cancelled

Start date	Stop date	Days	Entry time	Comment	Type	Created by
5/12/2019	18/12/2019	14	5/12/2019 2:52 PM	2 weeks free for referring a friend - Mary Jones	Assigned	Naomi Mikic

Use saved free days + Assign free period + Cancel -



Cancel a free period

Click on the 'Free periods' tab, ensure the correct free period is highlighted and click on the 'Cancel' button down the bottom of the screen.

Start date	Stop date	Days	Entry time	Comment	Type	Created by
5/12/2019	18/12/2019	14	5/12/2019 2:52 PM	2 weeks free for referring a friend - Mary Jones	Assigned	Naomi Mikic

Blocked periods

– Club Manager access only

If you need to block someone out of the club, due to having an outstanding debt that needs to be cleared before using the gym, club managers will be able to block their subscription so that they are unable to use the facilities.

To block a member from using their subscription:

1. Click on the 'Blocked periods' tab

Flexi Membership: Frozen

Name	Center	Status	Sub-state	Current ...	Start	Stop
Flexi Membership	Fernwood HQ	Frozen	None	60.00	5/12/20...	
└ FIIT30 Flexi	Fernwood HQ	Frozen		50.00	5/12/20...	

View Change Edit members New add-on Prepay

Reactivate Regret sub. Stop

Freeze Free periods **Blocked periods**

Start date	Stop date	Entry time	Comment	Type
5/12/2019	18/12/2019	5/12/2019 8:11 PM		Freeze

Block subscription Cancel

2. Click on 'Block subscriptions' tab in the bottom left hand side of the screen

Freeze Free periods **Blocked periods**

Start date	Stop date	Entry time	Comment	Type
5/12/2019	18/12/2019	5/12/2019 8:11 PM		Freeze

Block subscription Cancel

3. Enter in the blocked period dates and click OK.

Block subscription

Subscription

Name 12 Month Ongoing
 Start date 5/12/2019
 Stop date
 Billed until 11/12/2019

Duration

Start date 5/12/19

Set end date

Stop date 19/12/2019

Note

Text

Outstanding amount - do not allow access to club

Ok Cancel




The blocked period will now show up under the 'Blocked period' tab.

Freeze Free periods Blocked periods Include cancelled




Start date	Stop date	Entry time	Comment	Type	Created by
5/12/2019	19/12/2019	5/12/2019 2:58 PM	Outstanding amount - do not allow access to club	Employee	Naomi Mikic

Block subscription Cancel

To cancel the blocked period, click on the blocked period and select 'Cancel' down the bottom.

Freeze Free periods Blocked periods Include cancelled



Start date	Stop date	Entry time	Comment	Type	Created by
5/12/2019	19/12/2019	5/12/2019 2:58 PM	Outstanding amount - do not allow access to club	Employee	Naomi Mikic

Block subscription Cancel

Clip cards tab

This section is where you can view all the session balances and purchase history of Personal Training, FIIT30, Food Coaching, Reformer Pilates, Wellness Wednesdays, Wellness, Sauna and Childcare that have been added as a recurring clip card on direct debit or via a POS clip card pack.

Processing a Clip Card

Membership > Clip Cards > New > Select Product > Process through cash register

1. To add a clip card click on the 'Clip cards' tab followed by the 'New' tab

Jane Test

Summary Details Membership Journal Account Booking Relations

Subscriptions Clip cards Privileges Privilege usages

PURCHASES

Include old clipcards

Name	Center	Assigned staff	Clips	Start	Stop	State
------	--------	----------------	-------	-------	------	-------

New

Adjust clips

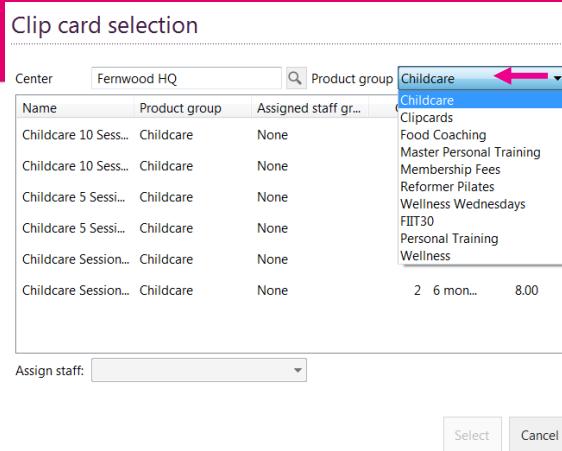
Adjust stop date

Edit assigned staff

Transfer clip card

Credit clips

2. Select the 'Product group' drop down menu to select the service or product the person would like to purchase



3. Select the name of the product they would like to purchase, then click select.

Clip card selection

Name	Product group	Assigned staff gr...	Clips	Durati...	Price
Childcare 10 Sess...	Childcare	None	10	6 mon...	50.00
Childcare 10 Sess...	Childcare	None	20	6 mon...	80.00
Childcare 5 Sessi...	Childcare	None	5	6 mon...	25.00
Childcare 5 Sessi...	Childcare	None	10	6 mon...	40.00
Childcare Session...	Childcare	None	1	6 mon...	5.00
Childcare Session...	Childcare	None	2	6 mon...	8.00

4. The cash register will now open and select the payment type the member will be purchasing the service/product with (CASH OR CARD) or select other payment to select 'Payment account' (debit account that we have on file for the member for their fortnightly direct debits)



FREQUENT PRODUCTS		Search	ACTIVATION KIT
CELL IQ	CHILDCARE	FOOD & DRINK	FOOD COACHING
MASTER PERSONAL TRAINING	MEMBERSHIP FEES	MERCHANDISE	REFORMER PILATES
FIIT30	PERSONAL TRAINING	WELLNESS	

Products (Frequent products)

Activation Kit	Member Transfer Fee
----------------	---------------------

1 Childcare 10 Session Pass - 1 Child	50.00
Jane	
\$50.00	
CARD (50.00)	CASH (50.00)
OTHER PAYMENTS	

Other payments
will add payment
amount onto the
direct debit

1 Childcare 10 Session Pass - 1 Child	50.00	Jane																				
		\$50.00																				
CANCEL	PARK	DISCOUNT																				
		OTHER PAYMENTS																				
50.00 		Amount to pay \$50.00																				
<table border="1" style="width: 100%; text-align: center;"> <tr> <td colspan="2">GIFT CARD</td> <td>CASH ACCOUNT</td> <td>PAYMENT ACCOUNT -175.00 \$</td> </tr> <tr> <td>7</td> <td>8</td> <td>9</td> <td></td> </tr> <tr> <td>4</td> <td>5</td> <td>6</td> <td></td> </tr> <tr> <td>1</td> <td>2</td> <td>3</td> <td></td> </tr> <tr> <td>00</td> <td>.</td> <td>0</td> <td></td> </tr> </table>		GIFT CARD		CASH ACCOUNT	PAYMENT ACCOUNT -175.00 \$	7	8	9		4	5	6		1	2	3		00	.	0		Click on 'Payment account' to add to the members' fortnightly debit
GIFT CARD		CASH ACCOUNT	PAYMENT ACCOUNT -175.00 \$																			
7	8	9																				
4	5	6																				
1	2	3																				
00	.	0																				
		CASH (50.00)																				
		CREDIT CARD																				

View Clip Card Balances

Membership > Clip Card > View summary of all clip cards assigned to a member

Subscriptions	Clip cards	Privileges	Privilege usages														
PURCHASES																	
<input type="checkbox"/> Include old clipcards																	
<table border="1" style="width: 100%;"> <thead> <tr> <th>Name</th><th>Center</th><th>Assigned staff</th><th>Clips</th><th>Start</th><th>Stop</th><th>State</th></tr> </thead> <tbody> <tr> <td>Childcare 10 Session Pass - 1 Child</td><td>Fernwood HQ</td><td>None</td><td>10</td><td>Today 00:00</td><td>5/06/2020 12:00 AM</td><td>Active</td></tr> </tbody> </table>				Name	Center	Assigned staff	Clips	Start	Stop	State	Childcare 10 Session Pass - 1 Child	Fernwood HQ	None	10	Today 00:00	5/06/2020 12:00 AM	Active
Name	Center	Assigned staff	Clips	Start	Stop	State											
Childcare 10 Session Pass - 1 Child	Fernwood HQ	None	10	Today 00:00	5/06/2020 12:00 AM	Active											
New 	Adjust clips 	Adjust stop date 	Edit assigned staff 	Transfer clip card	Credit clips												

View Clip Card Usage

To view when a member has used a session in Exerp or to audit their clips being deducted and when follow the steps below:

1. Go to the person's profile in Exerp > Membership tab > Clip cards
2. Check the box "View Old Clip cards". This will ensure any packs that been used will be loaded her as well.

Summary	Details	Membership	Journal	Account	Booking	Relations				
Subscriptions	Clip cards	Privileges	Privilege usages							
PURCHASES										
<input checked="" type="checkbox"/> Include old clipcards										
Name	Center	Assigned staff	Clips	Start	Stop	State				
FCM Migration_PT Pack - 100 Sessions	Ferntree Gully	None	94	16/03/2020 12:00 AM	16/11/2020 12:59 AM	Active				
PT Comp Session	Ferntree Gully	Vanessa Malcholm	1	21/07/2020 12:00 AM	21/01/2021 12:00 AM	Active				
FCM Migration_Food Coaching Pack - 100 Sessions	Ferntree Gully	None	100	16/03/2020 12:00 AM	16/11/2020 12:59 AM	Active				
Reformer Pilates - 1 Session	Ferntree Gully	None	0	3/08/2020 12:00 AM	3/02/2021 12:00 AM	Finished				
Reformer Pilates Comp Session	Ferntree Gully	None	0	3/08/2020 12:00 AM	3/02/2021 12:00 AM	Finished				
PT Comp Session	Ascot Vale	None	0	27/03/2020 12:00 AM	26/11/2020 1:00 AM	Finished				
FIIT30 - 3 Session Intro	Ascot Vale	None	0	27/03/2020 12:00 AM	26/11/2020 1:00 AM	Finished				
FIIT30 Comp Session	Ascot Vale	None	0	27/03/2020 12:00 AM	26/11/2020 1:00 AM	Finished				

3. Select the clip card you are wanting to view the usage for so that it is highlighted in orange. You will then notice in the bottom half of the screen the Usage table will load the information on the sessions each clip was used for.

Summary	Details	Membership	Journal	Account	Booking	Relations				
Subscriptions	Clip cards	Privileges	Privilege usages							
PURCHASES										
<input checked="" type="checkbox"/> Include old clipcards										
Name	Center	Assigned staff	Clips	Start	Stop	State				
FCM Migration_PT Pack - 100 Sessions	Ferntree Gully	None	94	16/03/2020 12:00 AM	16/11/2020 12:59 AM	Active				
PT Comp Session	Ferntree Gully	Vanessa Malcholm	1	21/07/2020 12:00 AM	21/01/2021 12:00 AM	Active				
FCM Migration_Food Coaching Pack - 100 Sessions	Ferntree Gully	None	100	16/03/2020 12:00 AM	16/11/2020 12:59 AM	Active				
Reformer Pilates - 1 Session	Ferntree Gully	None	0	3/08/2020 12:00 AM	3/02/2021 12:00 AM	Finished				
Reformer Pilates Comp Session	Ferntree Gully	None	0	3/08/2020 12:00 AM	3/02/2021 12:00 AM	Finished				
PT Comp Session	Ascot Vale	None	0	27/03/2020 12:00 AM	26/11/2020 1:00 AM	Finished				
FIIT30 - 3 Session Intro	Ascot Vale	None	0	27/03/2020 12:00 AM	26/11/2020 1:00 AM	Finished				
FIIT30 Comp Session	Ascot Vale	None	0	27/03/2020 12:00 AM	26/11/2020 1:00 AM	Finished				

New	Adjust clips	Adjust stop date	Edit assigned staff	Transfer clip card	Credit clips		
USAGE							
Usage time	Activity start	Activity stop	Activity	Employee	Description	Type	Clips
24/07/2020 4:02 AM	23/07/2020 4:00 PM	23/07/2020 4:30 PM	Personal Training 30 Mins: Vanessa Muir		Personal Training 30 M...	Sanction	-1
22/07/2020 9:02 PM	22/07/2020 9:00 AM	22/07/2020 9:30 AM	Personal Training 30 Mins: Vanessa Muir		Personal Training 30 M...	Sanction	-1
22/07/2020 8:02 PM	22/07/2020 8:00 AM	22/07/2020 8:30 AM	Personal Training 30 Mins: Vanessa Muir		Personal Training 30 M...	Sanction	-1
22/07/2020 7:17 PM	22/07/2020 7:15 AM	22/07/2020 7:45 AM	Personal Training 30 Mins: Vanessa Muir		Personal Training 30 M...	Sanction	-1
17/07/2020 4:32 AM	16/07/2020 4:30 PM	16/07/2020 5:00 PM	Personal Training 30 Mins: Vanessa Muir		Personal Training 30 M...	Sanction	-1
17/07/2020 4:02 AM	16/07/2020 4:00 PM	16/07/2020 4:30 PM	Personal Training 30 Mins: Vanessa Muir		Personal Training 30 M...	Sanction	-1

4. Each line will give you the below information:

Usage time: This is the time of when the member has used the clip (the time of booking)

Activity start: The start time of their appointment

Activity stop: The end time of their appointment

Activity: The activity they are doing i.e. Personal Training

Employee: The staff member it is with

Description: Description of activity

Type: This will be 1 of 3 options.

Sanction: a no show or late cancellation and they have been charged for their appointment

Privilege: they have attended the session

Adjustment: there has been a manual adjustment of their session balance

Clips: -1 a clip has been deducted or 1 a session has been added onto their account

Adjusting Clip Card Balance for a Member

Membership > Clip Cards > Select clip card > Adjust Clips

Tahlia Day



Summary Details Membership Journal Account Booking Relations Employee

Subscriptions Clip cards Privileges Privilege usages

PURCHASES

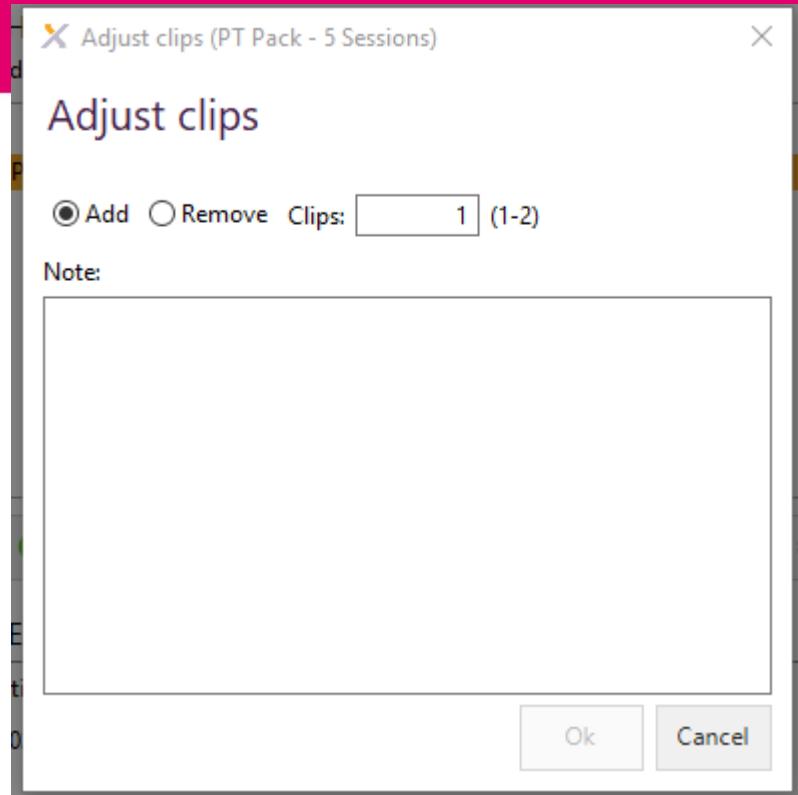
Include old clipcards

Name	Center	Assigned staff	Clips	Start	Stop	State
PT Pack - 5 Sessions	Fernwood HQ	None	5	Today 00:00	6/07/2020 12:00 AM	Active



New Adjust clips Adjust stop date Edit assigned staff Transfer clip card Credit clips

1. Click the 'Adjust clips' button.
2. Click either 'Add' or 'Remove' and adjust the clip card balance as required.
3. Ensure you type in the reason for adjusting the clip card balance, then click OK



PLEASE NOTE: any manual adjustments of clips cards, the system will apply an automatic reconciliation to the associated pack. For example, if a member has purchased a 5 pack of PT you will only be able to adjust their clip balance to a maximum of 5 clips.

If you require to add additional clips over this balance, we recommend processing a new PT Pack through Front Desk and apply a 100% discount to the product.

Privileges

Privileges define what a member has access to in the club.

Privileges that are included in every subscription

- Gym access
- Reciprocal rights
- Fitness Coach

Reciprocal Rights

Each member has the privilege to visit any other Fernwood club 24 times in a 12-month period. Members simply take their membership card to the Fernwood club they wish to visit and swipe their card as per normal. The system will automatically deduct the visits each time a member swipes into a sister club. Their visits will reset on January 1st each year.

If a member reaches their limit of 24 visits they will then be prompted to purchase additional visits at their visiting Fernwood club.

Fitness Coaching: Each member has the privilege to book into Fitness Coach appointments as it's included in their subscription.

As you can see below, Jane Test has access to the gym, reciprocal rights (visits to any Fernwood in Australia), fitness coach appointments and childcare (seeing Jane purchased a clip card through POS).

Jane Test

Membership tab

Privileges

Source type	Source	Privilege	Price	Valid for	Valid from	Valid to	Sponsorship	Deduction
Subscription	12 Month Ongoing	Gym Access		Fernwood HQ	5/12/2019 1:21 PM			
Subscription	12 Month Ongoing	Reciprocal Rights		Australia	5/12/2019 1:21 PM			
Clip card	Childcare 10 Sessi...	Childcare		Fernwood HQ	5/12/2019 12:00 ...	5/06/2020 12:00 ...		1 clip valid for (2)
Subscription	12 Month Ongoing	Fitness Coaching		Fernwood HQ	5/12/2019 1:21 PM			

Edit privilege set Edit grantee

Journal tab

Attend log

This is where all member visits and check ins are recorded.

Jane Test



Journal tab

Attend log

Date	Start time	End time	Type	Resource name	Center	Person ID	M...

From 6/11/19 To 5/12/19 Include attends Include checkins

Documents

This is where all journal notes and old contact history is stored. You will also find any documentation that has been produced for that member under here in a PDF.

Created date	Subject	Created by	Person	Filename	Type	Signed time
5/12/2019 8:11 PM	Create freeze receipt	Naomi Mikic	100p652		Freeze creation receipt	
5/12/2019 3:27 PM	Payment note	Naomi Mikic	100p652		Payment note	
5/12/2019 3:17 PM	Customer contract	Naomi Mikic	100p652	SubscriptionContract...	Subscription contract	
5/12/2019 3:16 PM	Payment note	Naomi Mikic	100p652		Payment note	
5/12/2019 3:16 PM	Account payment note	Naomi Mikic	100p652		Account payment note	
5/12/2019 3:01 PM	Blocked subscription ...	Naomi Mikic	100p652		Note	
5/12/2019 2:58 PM	Employee blocked su...	Naomi Mikic	100p652		Note	
5/12/2019 2:54 PM	Cancel free period rec...	Naomi Mikic	100p652		Free period cancellati...	
5/12/2019 2:53 PM	Assign free period rec...	Naomi Mikic	100p652		Free period assignment	
5/12/2019 2:48 PM	Cancel freeze receipt	Naomi Mikic	100p652		Freeze cancellation re...	
5/12/2019 2:43 PM	Change freeze receipt	Naomi Mikic	100p652		Freeze change	
5/12/2019 2:43 PM	Create freeze receipt	Naomi Mikic	100p652		Freeze creation receipt	
5/12/2019 2:24 PM	Payment note	Naomi Mikic	100p652		Payment note	
5/12/2019 1:42 PM	Freeze	Naomi Mikic	100p652		Note	
5/12/2019 1:21 PM	Payment note	Naomi Mikic	100p652		Payment note	
5/12/2019 1:21 PM	Customer contract	Naomi Mikic	100p652	SubscriptionContract...	Subscription contract	
5/12/2019 1:16 PM	EFT agreement	Naomi Mikic	100p652		Payment agreement c...	
5/12/2019 1:14 PM	Person created	Naomi Mikic	100p652		Note	

Viewing old contact history from FCM

To find any old contact notes that were migrated across from FCM – these can be found under the member's profile > Journal > Documents.

From this screen you need to manually adjust the date range selected to include any of these migrated contact notes. The subject of the contact notes will be listed as "**Personal Training – Internal Contact**" or "**Cancellation – Internal Contact**" etc.

To view the details of the contact > select the journal document > click on View.

This will bring up a new window to read the journal note and you can then drag the edge of the note to make it a bit more user friendly to read.

Adele Henry

Summary	Details	Membership	Journal	Account	Booking	Relations
Attend log Documents Messages Questionnaires To-do's Tasks Log Status history Change history						
From	1/01/2020	To	5/08/20	Type	All	
Created date	Subject	Created by	Person		Filename	Type
31/03/2020 8:51 AM	Assign free period receipt	Exerp Support (RRT)	301p698			Free perio
25/03/2020 5:07 AM	Assign free period receipt	Exerp Support (RRT)	301p698			Free peri
13/03/2020 1:36 AM	Apply: Change person attribute	Mark Hanna	301p698			Note
13/03/2020 1:28 AM	Apply: Change person attribute	Mark Hanna	301p698			Note
13/03/2020 1:20 AM	Apply: Change person attribute	Mark Hanna	301p698			Note
3/02/2020 10:46 PM	Apply: Export to 3rd party system	Giorgio Technogym	301p698			Note
3/02/2020 10:46 PM	My Wellness Cloud	Giorgio Technogym	301p698			Note
3/02/2020 6:25 PM	Apply: Export to 3rd party system	Exerp Support (RRT)	301p698			Note
3/02/2020 5:26 PM	Apply: Export to 3rd party system	Exerp Support (SPO)	301p698			Note
3/02/2020 5:26 PM	My Wellness Cloud	Exerp Support (SPO)	301p698			Note
3/02/2020 1:10 PM	Conversion Log	Exerp Admin	301p698			Note
3/02/2020 1:10 PM	Person created	Exerp Admin	301p698			Note
3/02/2020 10:37 AM	Tour Detail	Exerp Admin	301p698			Note
3/02/2020 10:37 AM	Enquiry Detail	Exerp Admin	301p698			Note
3/02/2020 10:33 AM	Base Membership subscription price calcul...	Exerp Admin	301p698			Note
3/02/2020 10:31 AM	Member: FM99-2699 Previous Payments	Exerp Admin	301p698			Note
3/02/2020 10:31 AM	Member: FM99-2699 Previous Payments	Exerp Admin	301p698			Note
3/02/2020 10:31 AM	Previous Memberships	Exerp Admin	301p698			Note
3/02/2020 10:30 AM	Summary of freezes migrated from legacy ...	Exerp Admin	301p698			Note
2/02/2020 4:02 PM	ImpactData - sms	Exerp Admin	301p698			Note
26/01/2020 4:01 PM	ImpactData - sms	Exerp Admin	301p698			Note
21/01/2020 9:01 AM	ImpactData - email	Exerp Admin	301p698			Note
16/01/2020 9:02 AM	Personal Training - Internal Contact	Exerp Admin	301p698			Note
16/01/2020 9:02 AM	Personal Training - Internal Contact	Exerp Admin	301p698			Note

Viewing payment history for members from FCM – Creating a Health Fund Receipt

To review a member's previous payments and debit history from FCM – this can be found under their profile in Exerp > Journal > Documents > Subject: Member [FCM MEMBER ID] Previous Payments.

1. In the member's profile > Journal > Documents.
2. Find the subject line Member [FCM MEMBER ID] Previous Payments and select the line and click View.

3/02/2020 10:31 AM	Member: FM99-2699 Previous Payments	Exerp Admin	301p698	Note
3/02/2020 10:31 AM	Member: FM99-2699 Previous Payments	Exerp Admin	301p698	Note
3/02/2020 10:31 AM	Previous Memberships	Exerp Admin	301p698	Note
3/02/2020 10:30 AM	Summary of freezes migrated from legacy ...	Exerp Admin	301p698	Note
2/02/2020 4:02 PM	ImpactData - sms	Exerp Admin	301p698	Note
26/01/2020 4:01 PM	ImpactData - sms	Exerp Admin	301p698	Note
21/01/2020 9:01 AM	ImpactData - email	Exerp Admin	301p698	Note
16/01/2020 9:02 AM	Personal Training - Internal Contact	Exerp Admin	301p698	Note
12/01/2020 4:01 PM	ImpactData - email	Exerp Admin	301p698	Note
9/01/2020 8:01 PM	ImpactData - email	Exerp Admin	301p698	Note
8/01/2020 6:17 PM	Personal Training - Phone	Exerp Admin	301p698	Note
1/01/2020 10:01 AM	ImpactData - email	Exerp Admin	301p698	Note

Create Edit View Sign

3. This will bring it up in a new window for you, however I would recommend using the arrows to drag the window across for a more user friendly view. This window will give a line item for each debit, whether or not it was successful and the amount that was debited.

The screenshot shows a 'Journal document' window. At the top, it says 'Journal document'. Below that, there are three sections: 'Subject' (containing 'Member: FM99-2699 Previous Payments'), 'Details' (containing payment history for Jan 2020), and 'Attachment' (which is empty). The 'Details' section lists three payments:

- Creator: Migration; Member: FM99-2699 Previous Payments
30 Jan 2020 Payment: 23493947 Credit Card Debit Details: \$56.00 (Gym) - \$15.10 (Custom Discount) = \$40.90
Status: Successful
- 16 Jan 2020 Payment: 23432640 Credit Card Debit Details: \$56.00 (Gym) - \$15.10 (Custom Discount) = \$40.90
Status: Successful
- 02 Jan 2020 Payment: 23355908 Credit Card Debit Details: \$56.00 (Gym) - \$15.10 (Custom Discount) = \$40.90
Status: Successful

4. From here – if you need to put together a template for a health fund receipt or tax invoice for the member, you can pull the debit information from the journal documents and input the information using the Health Fund Receipt template we have uploaded onto the intranet under the Operations page > Exerp Training Manual.

Messages

This tab will show all messages sent to the member via text or email through Exerp.

The screenshot shows the 'Messages' tab in the Exerp interface. At the top, there are tabs for 'Attend log', 'Documents', 'Messages' (which is selected and highlighted in orange), 'Questionnaires', 'To-do's', 'Tasks', 'Log', 'Status history', and 'Change history'. Below the tabs, there are filters for 'From' (set to '5/06/19') and 'To' (set to '5/12/19'). A table below shows a list of messages sent between May 6 and May 12, 2019. The columns are: Created date, Delivery date, Delivery ..., Delivered by, Subject, From, Channel, Person, Charge, and Messaging Category. Two messages are listed:

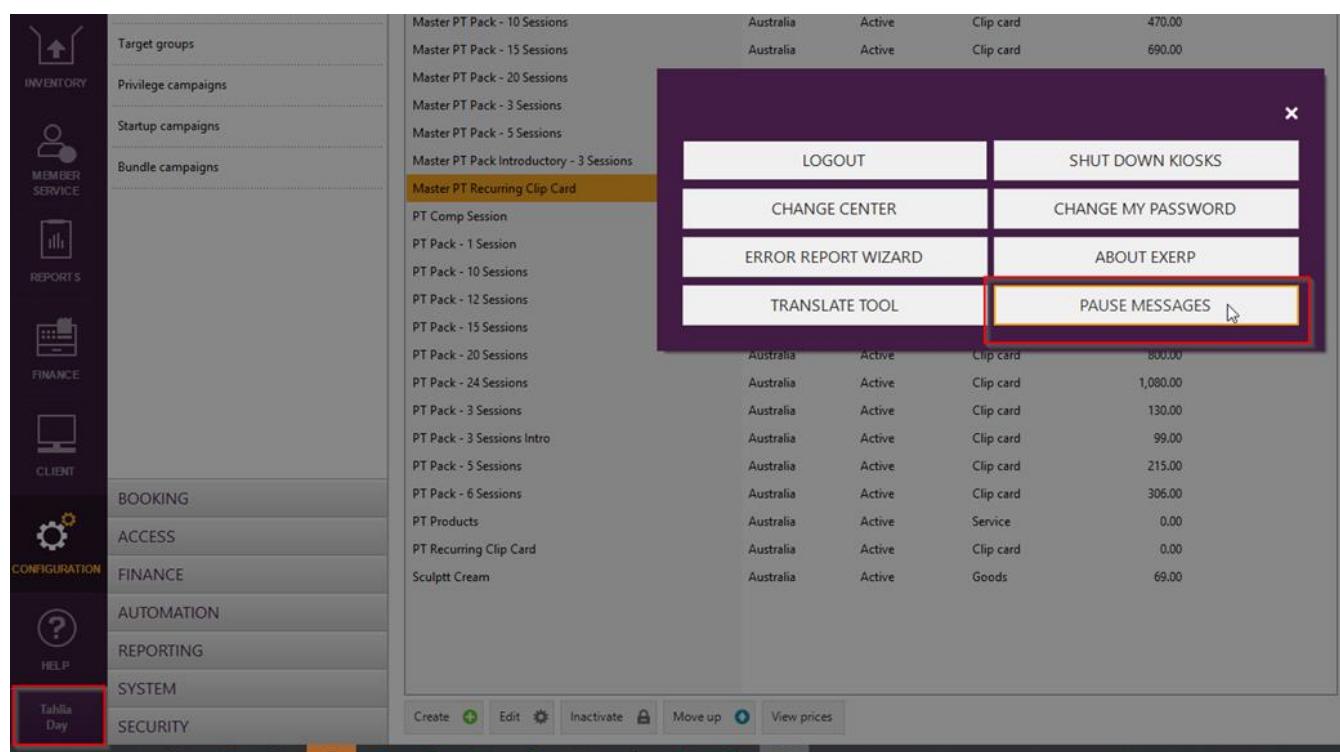
Created date	Delivery date	Delivery ...	Delivered by	Subject	From	Channel	Person	Charge	Messaging Category
5/12/2019 1...	5/12/2019 ...	E-mail		Welcome to Fernwood	ClubLead	E-mail	100p652		None
5/12/2019 1...	5/12/2019 ...	E-mail		Welcome to Fernwood	ClubLead	E-mail	100p652		None

At the bottom of the screen, there are four buttons: 'Resend messages', 'Mark message as delivered', 'Create' (with a green plus sign icon), and 'View' (with a magnifying glass icon).

Pausing Messages in Exerp

If you want to stop the automated communications going out in Exerp when processing a cancellation, freeze, downgrade etc. you can do so by applying Pause Messages.

1. Click on your name in the bottom left corner of Exerp
2. Select Pause Messages
3. Process what you need in Exerp
4. Remember to un-pause the messages afterwards so they start up again for Welcome Emails etc.



Sending a direct email or SMS to a member or lead via Exerp

If you would like to send a customised email to a member via Exerp, you can do this from their Journal > Messages tab.

All emails that get sent from here are in a Fernwood branded email template that will display your club's details in the signature of the email.

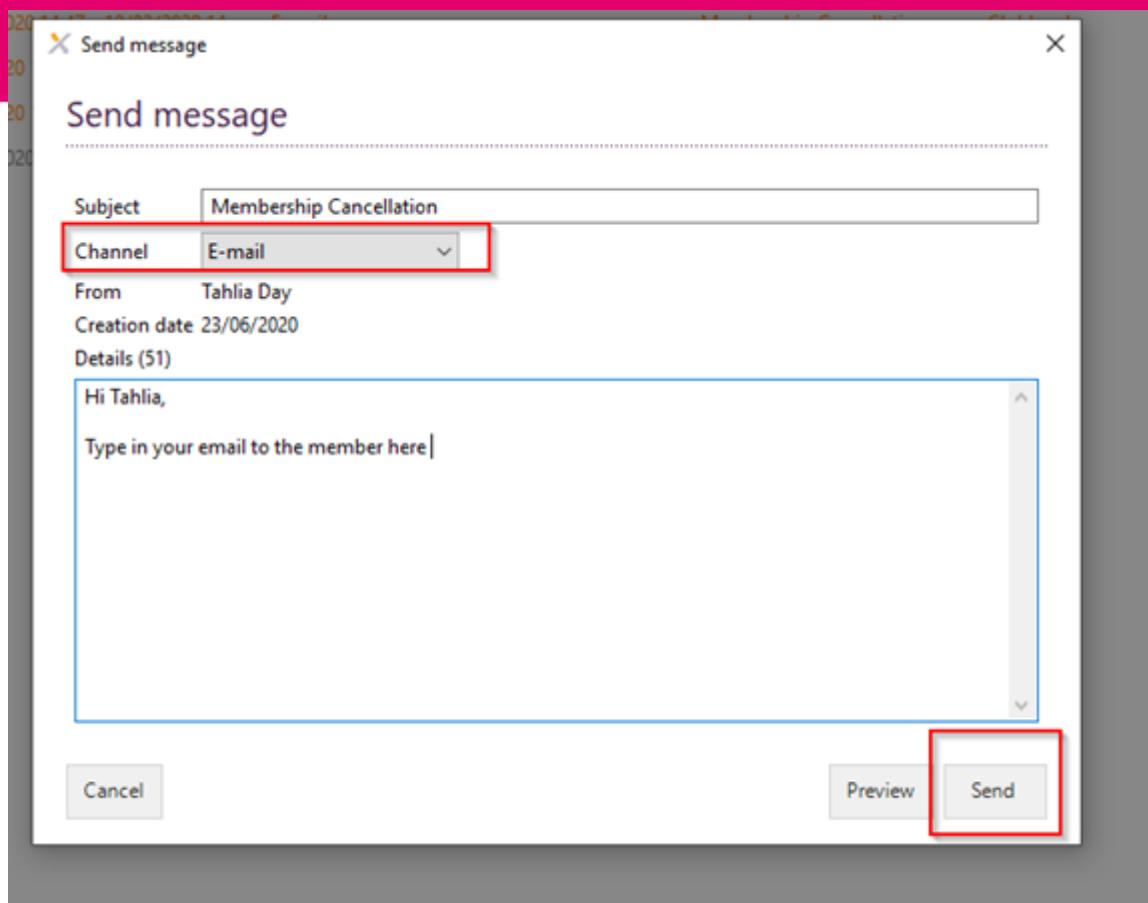
1. Go to the member's profile in Exerp > Journal tab > Messages
2. Click on Create in the bottom right corner

Attend log Documents Messages Questionnaires To-do's Tasks Log Status history Change history										
From 23/12/19		To 23/06/20								
Created date	Delivery date	Delivery me...	Delivered by	Subject	From	Channel	Person	Charge	Messa...	
11/03/2020 17:57	11/03/2020 17...	E-mail			Welcome to Fernwood	ClubLead	E-mail	301p8030	None	
10/03/2020 14:47	10/03/2020 14...	E-mail			Membership Cancellation	ClubLead	E-mail	301p7614	None	
5/03/2020 14:25	5/03/2020 14:25	E-mail			Welcome to Fernwood	ClubLead	E-mail	301p7614	None	
2/03/2020 12:11	2/03/2020 12:11	E-mail			Welcome to Fernwood	ClubLead	E-mail	301p7614	None	
28/02/2020 17:57		Undelivered			No address	ClubLead	Staff	901p54	None	

[Resend messages](#)[Mark message as delivered](#)[Create](#)

3. Update the channel to Email or SMS
4. Type in your subject line and copy of the email in the Details text box
5. You can click on Preview so you can see exactly what is being sent to the member and how it will be displayed.
6. Once happy click Send.

PLEASE NOTE: The SMS is a charge to the club of \$0.07 cents per SMS.



Email format to the member below:

FITNESS
fernwood®

Hi Tahlia,

Testing this email directly.

Thanks,

FERNWOOD CARLTON
193-197 Nicholson Street, CARLTON
Phone +61 3 9348 2022
Email carlton@fernwoodfitness.com.au
fernwoodfitness.com.au

Questionnaires

Exerp has the ability to store questionnaires that could be used for CRM, membership sale or exit interviews when a member cancels their membership.

This is where you can review the answers members have given on their Getting to Know You questionnaires, completed their MyPassport tasks and the Health and Wellness Check-In questions.

Assigning a Health & Wellness Check-In Questionnaire

As part of the new member journey, we have set up a questionnaire in Exerp that you can assign to a member at any time throughout the lifetime of their membership.

1. Go to the member's profile in Exerp > Journal tab > Questionnaire
2. Click on Create

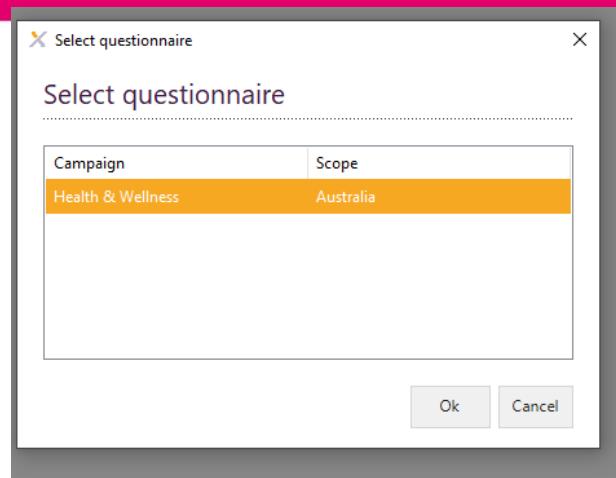
Tahlia Day

The screenshot shows a software interface for managing member profiles. At the top, there are tabs: Summary, Details, Membership, **Journal**, Account, Booking, Relations, and Employee. Under the Journal tab, there are sub-tabs: Attend log, Documents, Messages, **Questionnaires**, To-do's, Tasks, Log, Status history, and Change history. Below these tabs, there are date filters: From 23/12/19 and To 23/06/20, with a checkbox for Show completed. The main content area displays a table with one row:

Date	Questionnaires	Extract
2/03/2020	GTKY	TypePersonWizard

At the bottom left of the main content area, there is a button labeled "Create". This button is circled with a red oval.

- Select the Health & Wellness questionnaire that is available > Select OK



- This will bring up the Health & Wellness questionnaire that you can use as guidance when talking to the member, but also to complete their answers so it is stored in their profile. You can also use the answers here to report on at a later date.

Enter questionnaire

Enter questionnaire

Health And Wellness

Q1: On a scale of 0 – 10 (0 = zero satisfaction, 10 = could not be more satisfied) how happy and satisfied are you with your physical health/fitness
 Q2: Is there a particular reason why you have given yourself this score right now?
 Q3: Where would you like your satisfaction to be?
 Q4: What do you think would help you get there?
 Q5: On a scale of 0 – 10 (0 = zero satisfaction, 10 = could not be more satisfied) how happy and satisfied are you with your mental and emotional wellbeing?
 Q6: Is there a particular reason why you have given yourself this score right now?
 Q7: Where would you like your satisfaction to be?
 Q8: What do you think would help you get there?
 Q9: If there is one thing that you would choose to improve with regards to your overall health and wellbeing what would it be?
 Q10: Is there a particular reason you have chosen this to be the one thing you would improve?

Q1: Satisfaction with physical health/fitness

0
 1
 2
 3
 4
 5
 6
 7
 8
 9
 10

Q2: Reason for score?

Print

Save Cancel

Log tab

The log tab shows any changes or updates to a members' subscription



Attend log Documents Messages Questionnaires To-do's Tasks Log **Status history** Change history

Perspective All Date interval Last month From 6/11/19 To 5/12/19

Time	Type	Text	Employee ID	Employee
5/12/2019 8:11 PM	Account transaction	Account transaction of -\$4.00 entered: Flexi Membership: 5/12/2019 - 11/12/...	100emp603	Naomi Mikic
5/12/2019 8:11 PM	Account transaction	Account transaction of \$30.00 entered: PartialCreditnote Flexi Membership: 5...	100emp603	Naomi Mikic
5/12/2019 8:11 PM	Account transaction	Account transaction of \$25.00 entered: PartialCreditnote Flexi Membership: 5...	100emp603	Naomi Mikic
5/12/2019 8:11 PM	Person status	Changed to Temporary inactive	100emp603	Naomi Mikic
5/12/2019 8:11 PM	Privilege	Privilege Reciprocal Rights stopped in scope Australia, 5/12/2019 - 5/12/2019		
5/12/2019 8:11 PM	Privilege	Privilege Gym Access stopped in scope Australia, 5/12/2019 - 5/12/2019		
5/12/2019 8:11 PM	Privilege	Privilege FIIT30 stopped in scope Australia, 5/12/2019 - 5/12/2019		
5/12/2019 8:11 PM	Subscription	'Flexi Membership' changed state to Frozen	100emp603	Naomi Mikic
5/12/2019 8:11 PM	Blocked period	Blocked period entered, 5/12/2019 - 18/12/2019	100emp603	Naomi Mikic
5/12/2019 8:11 PM	Free period	Free period entered, 5/12/2019 - 18/12/2019	100emp603	Naomi Mikic
5/12/2019 8:11 PM	Freeze	Freeze entered, 5/12/2019 - 18/12/2019	100emp603	Naomi Mikic
5/12/2019 3:27 PM	Account transaction	Account transaction of -\$25.00 entered: Shop sale: FIIT30 Flexi, 5/12/2019 - 1...	100emp603	Naomi Mikic
5/12/2019 3:16 PM	Privilege	Privilege Reciprocal Rights started in scope Australia, 5/12/2019 - 5/12/2019		
5/12/2019 3:16 PM	Privilege	Privilege Gym Access started in scope Australia, 5/12/2019 - 5/12/2019		
5/12/2019 3:16 PM	Privilege	Privilege FIIT30 started in scope Australia, 5/12/2019 - 5/12/2019		
5/12/2019 3:16 PM	Subscription	'Flexi Membership' changed state to Active	100emp603	Naomi Mikic
5/12/2019 3:16 PM	Subscription	'Flexi Membership' changed state to Created	100emp603	Naomi Mikic
5/12/2019 3:16 PM	Account transaction	Account transaction of -\$30.00 entered: New subscription sale: Flexi Member...	100emp603	Naomi Mikic
5/12/2019 3:16 PM	Privilege	Privilege Reciprocal Rights stopped in scope Australia, 5/12/2019 - 5/12/2019		

Status history

View the status journey of a member. View details on when they moved from a lead to a member and inactive to active.



Entry start	Entry end	Book start	Book end	State	Sub-state	Employee	Had role	Person
5/12/2019 1...	5/12/2019 ...	5/12/2019 ...	5/12/2019 ...	Lead		100emp603	Yes	100p652
5/12/2019 1...	5/12/2019 ...	5/12/2019 ...	5/12/2019 ...	Active		100emp603	Yes	100p652
5/12/2019 1...	5/12/2019 ...	5/12/2019 ...	5/12/2019 ...	Temporary inac...		100emp603	Yes	100p652
5/12/2019 1...	5/12/2019 ...	5/12/2019 ...	5/12/2019 ...	Active		100emp603	Yes	100p652
5/12/2019 1...	5/12/2019 ...	5/12/2019 ...	5/12/2019 ...	Temporary inac...		100emp603	Yes	100p652
5/12/2019 1...	5/12/2019 ...	5/12/2019 ...	5/12/2019 ...	Active		100emp603	Yes	100p652
5/12/2019 2...		5/12/2019 ...		Temporary inac...		100emp603	Yes	100p652

Change history

This tab provides a log of all changes made against a person's profile, including a dates and full audit history.

↓

Change history						
Change type	All	From	5/06/19	To	5/12/19	<input type="checkbox"/> Include internal attributes
5/12/2019 1:14 PM	PICTURE				Client	Naomi Mikic (100emp6...)
5/12/2019 1:14 PM	ALLOWS_CHARGED_SMS		false		Client	Naomi Mikic (100emp6... false
5/12/2019 1:14 PM	ALLOWED_CHANNEL_S...		true		Client	Naomi Mikic (100emp6... true
5/12/2019 1:14 PM	ALLOWED_CHANNEL_E...		true		Client	Naomi Mikic (100emp6... true
5/12/2019 1:14 PM	ALLOWED_CHANNEL_P...		false		Client	Naomi Mikic (100emp6... false
5/12/2019 1:14 PM	E_MAIL	jane.t@gmail.com.au			Client	Naomi Mikic (100emp6... jane.t@gmail.com.au
5/12/2019 1:14 PM	MOB_PHONE	+61423445678			Client	Naomi Mikic (100emp6... +61423445678
5/12/2019 1:14 PM	ADDRESS_1	123 Victor Street			Client	Naomi Mikic (100emp6... 123 Victor Street
5/12/2019 1:14 PM	CITY	MELBOURNE			Client	Naomi Mikic (100emp6...
5/12/2019 1:14 PM	ZIP_CODE	3000			Client	Naomi Mikic (100emp6... 3000
5/12/2019 1:14 PM	SEX	female			Client	Naomi Mikic (100emp6...
5/12/2019 1:14 PM	LAST_NAME	Test			Client	Naomi Mikic (100emp6... Test
5/12/2019 1:14 PM	BIRTHDATE	1991-03-15			Client	Naomi Mikic (100emp6... 1991-03-15
5/12/2019 1:14 PM	FIRST_NAME	Jane			Client	Naomi Mikic (100emp6... Jane
5/12/2019 1:14 PM	COUNTRY	AU			Client	Naomi Mikic (100emp6... AU

Account Tab

The account tab shows debit history, date of the next deduction and where you can raise an invoice and/or credit a member's account.

IMPORTANT REMINDER: When looking at a member's account you should always select the **View details** box so you can see a full summary of the member's account balance.

View a Member's Next Direct Debit

Under the account tab of the person's profile, the Next deduction line will give the next scheduled debit date with the amount.

The screenshot shows the 'Account' tab selected in a navigation bar. Below it is a sub-menu with 'Account information' highlighted. The main area displays a table of transactions and a summary of account balance.

Entry time	Text	Due date	Deposit	Withdra...	Open	Balance	Employee	Center	Book date	Info	Payme
> 5/12/2019 8:11	Flexi Membership: 5/12/2019 - 11/12/2019 (Freeze)		51.00		51.00	-203.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv55	
5/12/2019 3:27	Shop sale: FIIT30 Flexi, 5/12/2019 - 11/12/2019			-25.00	-25.00	-254.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv54	
> 5/12/2019 3:16	New subscription sale: Flexi Membership, 5/12/20...			-4.00	-4.00	-229.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv53	
> 5/12/2019 2:54	12 Month Ongoing: 5/12/2019 - 11/12/2019 (Use ...			-26.00	-26.00	-225.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv52	
> 5/12/2019 2:55	12 Month Ongoing: 5/12/2019 - 11/12/2019 (Use ...		26.00		26.00	-199.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv51	
> 5/12/2019 2:46	12 Month Ongoing: 5/12/2019 - 11/12/2019 (Free...			-22.00	-22.00	-225.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv50	
> 5/12/2019 2:45	12 Month Ongoing: 5/12/2019 - 11/12/2019 (Free...		4.00	-4.00		-203.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv48	
> 5/12/2019 2:45	12 Month Ongoing: 5/12/2019 - 11/12/2019 (Free...		22.00		22.00	-203.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv47	
5/12/2019 2:24	Shop sale: Childcare 10 Session Pass - 1 Child			-50.00	-50.00	-225.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv46	
5/12/2019 1:21	New subscription sale: 12 Month Ongoing, 5/12/2...			-175.00	-175.00	-175.00	Naomi Mikic	Fernwood HQ	5/12/2019	100inv45	

Summary of Account balance: **-203.00 \$**

Next deduction: **12/12/2019 - 262.00 \$**

Below the table are several buttons: View, Pay, Cash out, Invoice, Credit note, New transaction, Max Debit, Print, and file req.

The deduction details screen will pop up to see what the member will be debited for their future payments. If there are no changes to the member's price, you will just see the one amount and the system will debit that amount each fortnight.

If there is a scheduled price update or credit/invoice applied onto the account it will display here with the date. The image below references this.

The member has a debit for \$262.00 on the 12/12/2019 and then the debit after that on the 26/12/19 will be at \$110.00 ongoing.

Deduction detail

Select payment agreement 1: Fortnightly DD: *****-ING Direct--3456-TEST JANE (default) ▾

Description	Amount
> 12/12/2019	262.00 \$
> 26/12/2019	110.00 \$

[Send advance notice](#) [Cancel pending advance notices](#) [Mark as agreement change](#)

[CLOSE](#)

PLEASE NOTE: If there are no changes to a member's direct debit and there are no upcoming payments that are different to their usual membership amount, it will just display their next payment date with their membership amount. Rather than showing 20 entries of the same amount, it will just show 12 Month Ongoing \$48.00.

Instalment Plan Account

If a member has any items they are paying over an instalment plan i.e. Activation Kit, 5 pack of PT etc. the instalment plan information will display under the **Instalment Plan** account section, not the Payment Account section.

It is important to note here, that any instalment plan amount will not show under **Next Scheduled debit** as this is only looking at their payment account.

The scheduled instalment plan will have all details in the **Instalment plan account** section.

From the screenshot below, you can see that this instalment plan of \$130.00 is to split over their next 3 debits as per below.

- 20/08/20 @ \$43.33
- 03/09/20 @ \$43.33
- 17/09/20 @ \$43.34

Summary Details Membership Journal Account Booking Relations

Account information Payment Agreement Payment Requests Settlements Gift cards

Cash account Open transactions View Details Account balance -130.00 \$

Payment account From 6/02/20 Deduction day Thursday (Even Week) To 6/08/20 Max debit 10,000.00 \$

Installment plan account

Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance	Employee
6/08/2020 12:52 PM	PT Pack - 3 Sessions - CC - 3 Installments (3/3)	17/09/2020	-130.00	-130.00	-130.00	Tahlia Day	
	PT Pack - 3 Sessions - CC - 3 Installments (3/3)	17/09/2020		-43.34	-43.34		
	PT Pack - 3 Sessions - CC - 3 Installments (2/3)	3/09/2020		-43.33	-43.33		
	PT Pack - 3 Sessions - CC - 3 Installments (1/3)	20/08/2020		-43.33	-43.33		

How to Raise an Invoice

Member profile > Account tab > Invoice > Enter Details > Click Add > Search for product and update unit price to the amount you want to charge to a member, Select OK > Choose print options > Next & FINISH.

1. Open the member's profile in Exerp, select the Account tab
2. Select Invoice

Tahlia Day

Summary Details Membership Journal Account Booking Relations Employee

Account information Payment Agreement Payment Requests Settlements Gift cards

Cash account Open transactions View Details Account balance 0.00 \$

Payment account From 24/09/19 To 24/03/20

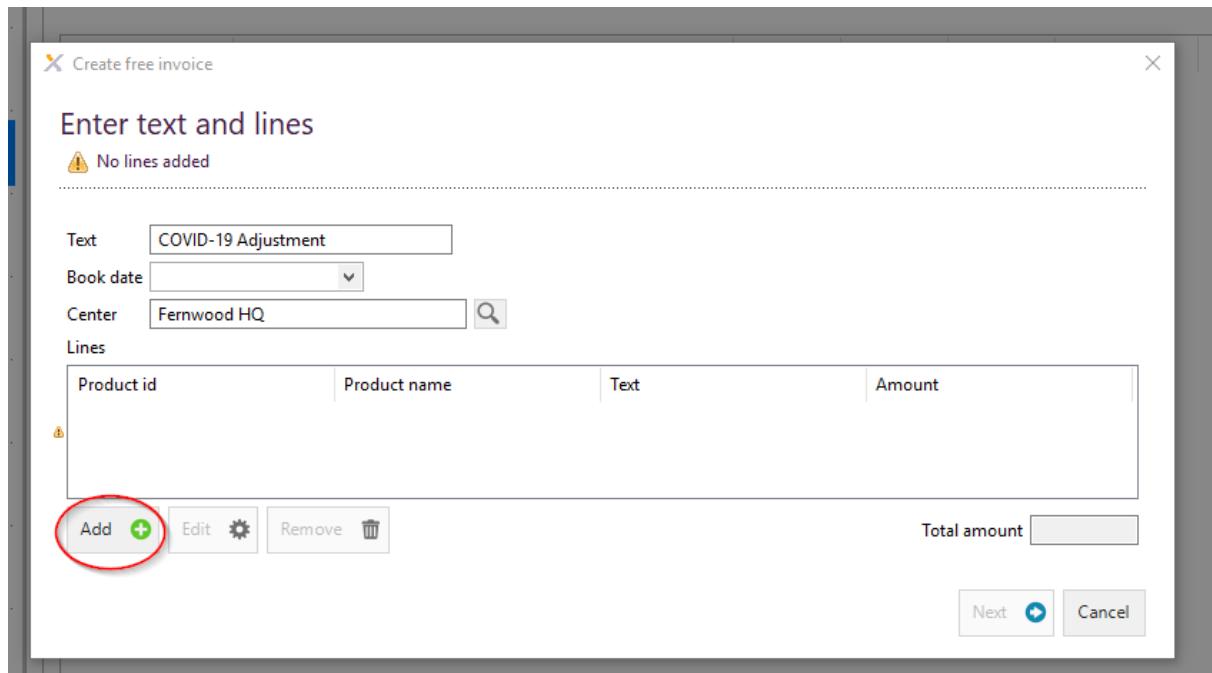
Next deduction: None

Entry time	Text	Deposit	Withdrawn	Open	Employee
24/03/2020 5:11 PM	New subscription sale: 12 Month Complimentary Staff, 24/03/2020				Mark Hanna

View Pay Cash out Invoice Credit note New transaction Max Debit Print View file requests

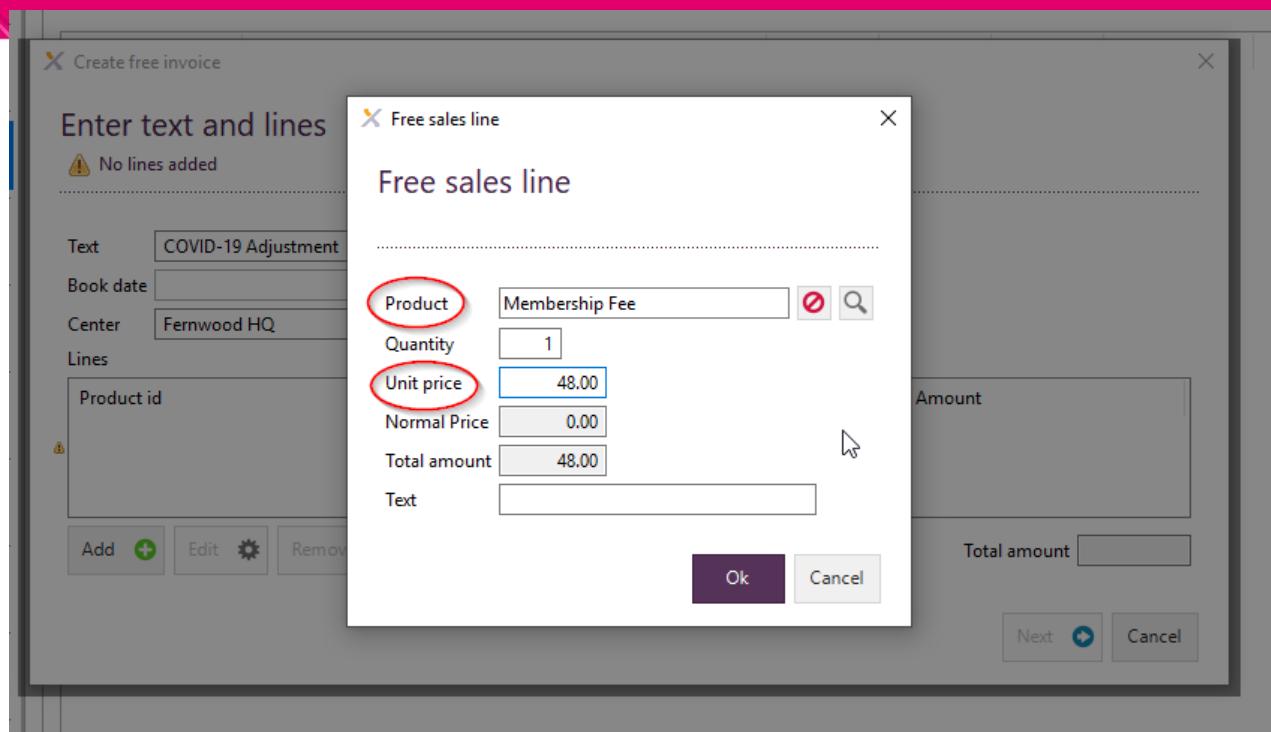
Installment plan

3. In the Text field enter – enter the reference for the invoice being raised > Select the book date (this can just be today's date) > Check your Centre is correct
4. Under Lines section > Click Add



5. In the Product field – select Membership Fee

6. Adjust the Unit Price to the applicable amount for that member > Select OK



7. Select Next > Choose Print Option
8. Review and Select Next to complete the invoice.

How to Issue a Credit Note

Member profile > Account tab > Credit Note > Add new credit line > Complete all the necessary details > Select Next > Review Summary > Select Payout option > FINISH.

1. Open up the member's profile in Exerp > Select the Account tab
2. Select Credit Note

Tahlia Day

Summary Details Membership Journal Account Booking Relations Employee

Account information Payment Agreement Payment Requests Settlements Gift cards

Cash account Open transactions View Details

Payment account From 25/09/19 Deduction day Thursday (Odd Weeks)

To 25/03/20

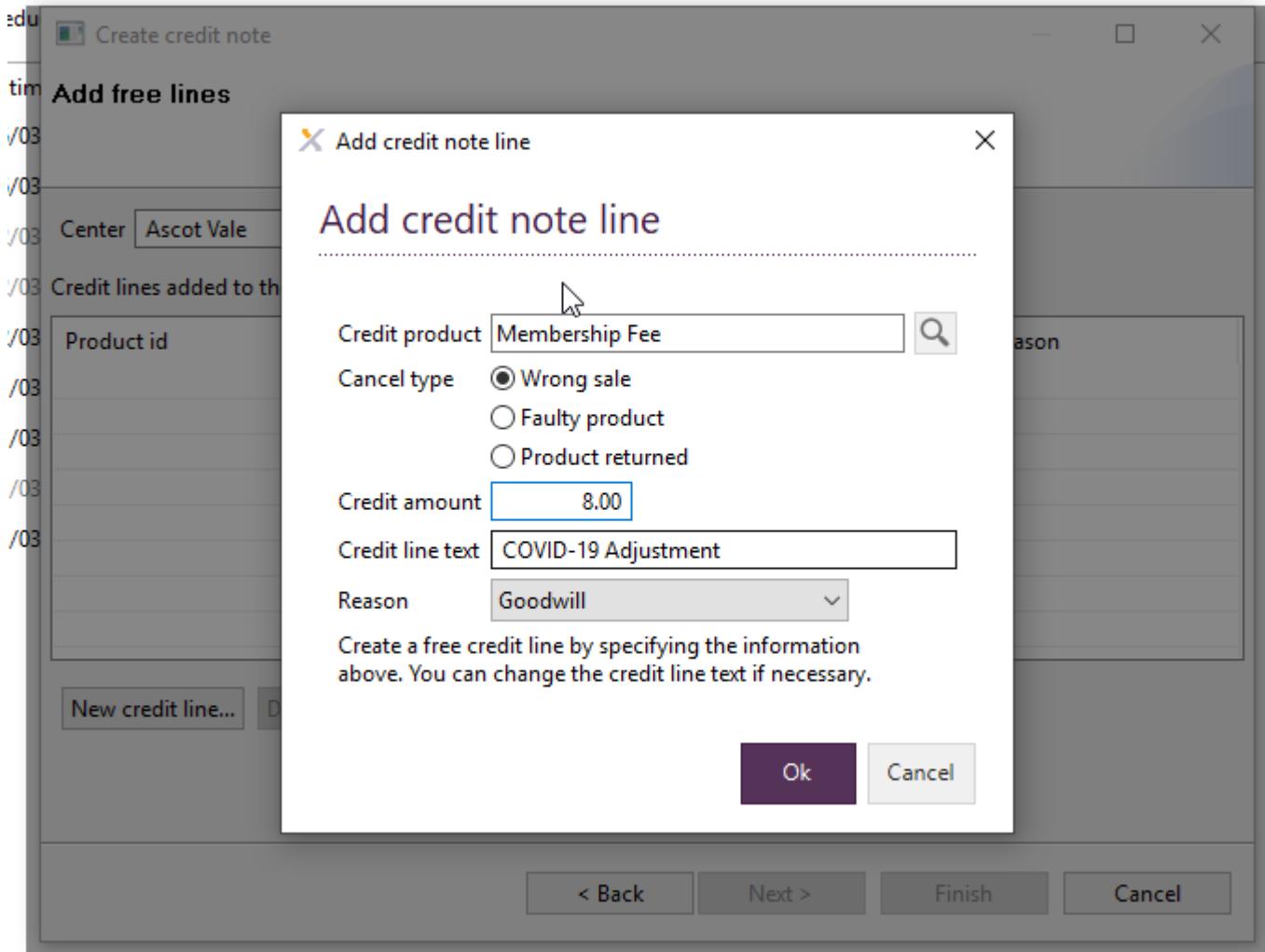
Next deduction: 26/03/2020 - 27.57 \$

Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance	Employee	Center	Settlements	Boc
25/03/2020 4:01 AM	12 Month Ongoing: 26/03/2020 - 8/04/2020 (Auto Renewal)			-24.00	-24.00	-27.57	System	Ascot Vale	New	26/(
> 12/03/2020 11:48 AM	12 Month Ongoing: 12/03/2020 - 25/03/2020 (Stop)		46.43		-3.57	-3.57	Clare Walker	Ascot Vale	New	12/(
> 12/03/2020 11:48 AM	12 Month Ongoing: 12/03/2020 - 25/03/2020 (Manual Price Adj...)		36.40			-50.00	Clare Walker	Ascot Vale	Closed	12/(
12/03/2020 1:00 AM	12 Month Ongoing: 12/03/2020 - 25/03/2020 (Auto Renewal)	12/03/2020		-86.40	-86.40	System	Ascot Vale	Closed	12/(
11/03/2020 5:59 PM	Account sale: Reformer Pilates - 1 Session				0.00	0.00	Tahlia Day	Ascot Vale	Closed	11/(
11/03/2020 5:59 PM	Account sale: Food Coaching Pack - 1 Session				0.00	0.00	Tahlia Day	Ascot Vale	Closed	11/(
> 11/03/2020 5:57 PM	New member comp FIIT30		0.00		0.00	0.00	System	Ascot Vale	Closed	11/(
11/03/2020 5:57 PM	New subscription sale: 12 Month Ongoing, 11/03/2020 - 11/03/...				0.00	0.00	Tahlia Day	Ascot Vale	Closed	11/(

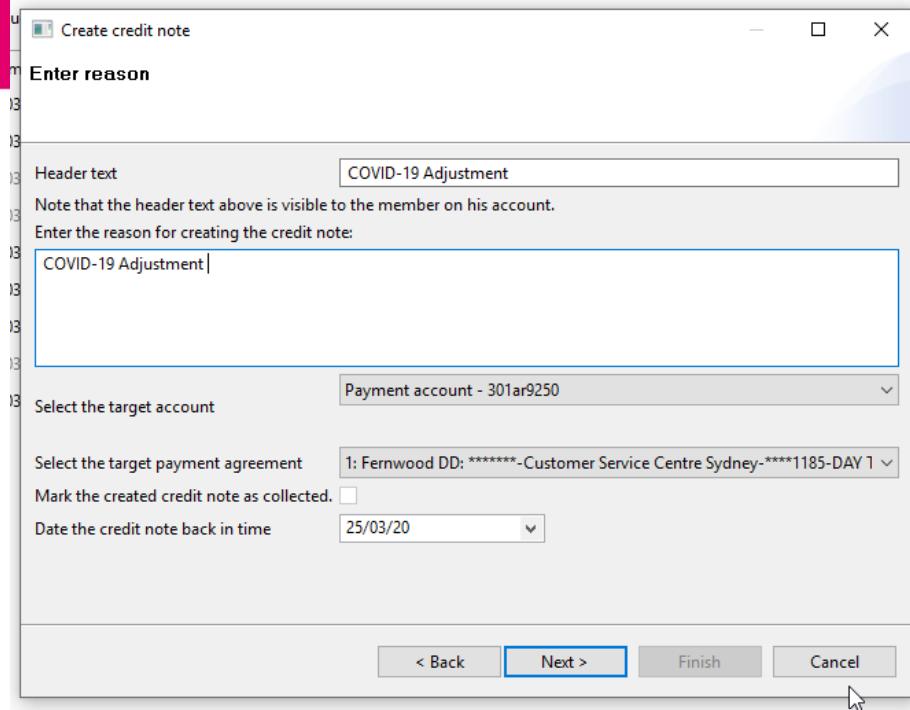
Credit note + New transaction + Max Debit Print View file requests Installment plan

3. It auto-selects 'Free Credit note' > Select Next
4. Select New Credit Line
 - a. In the Credit Product field type in 'Membership Fee' and select

- b. In the Cancel Type field – select ‘Wrong Sale’
- c. Enter the credit amount
- d. In the Credit Line field enter reference i.e. Wrong Sale – refund required
- e. In the Reason field – select the applicable reason
- f. Select OK



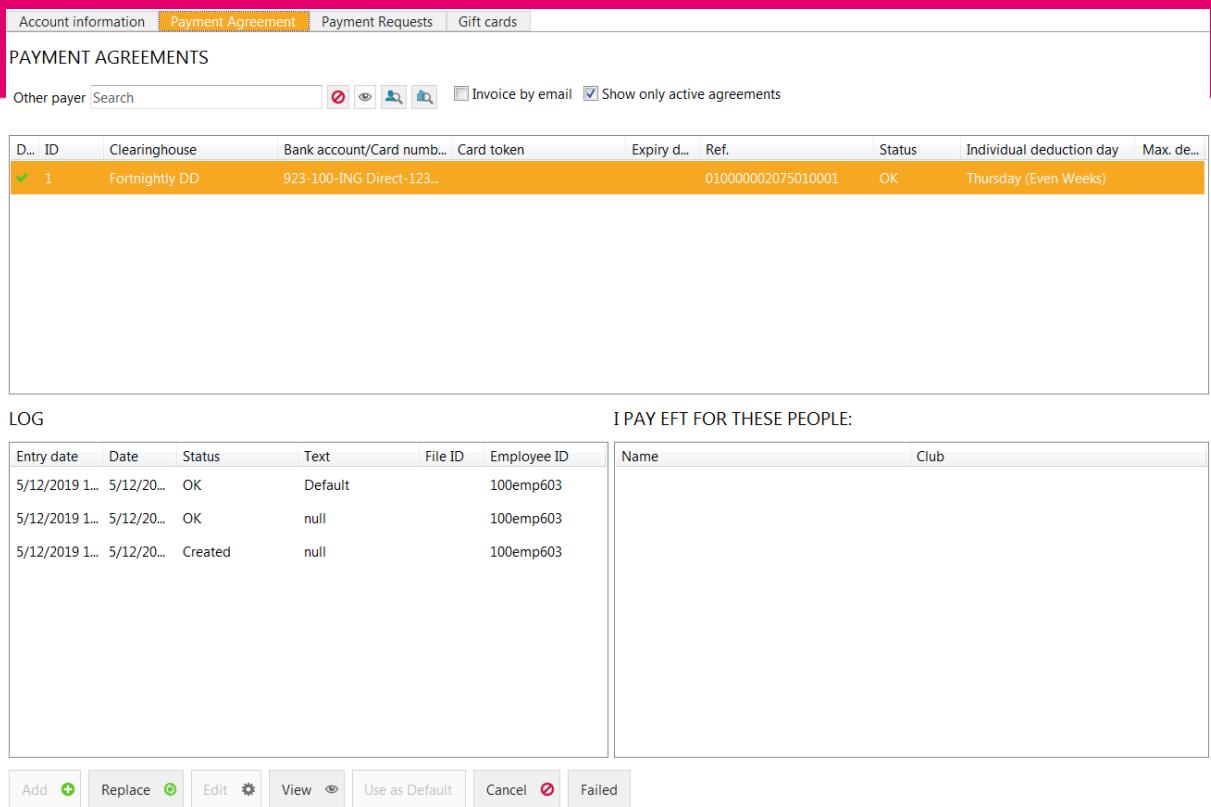
5. Select Next > Update the Header text for reference > Enter the reason for the credit note e.g. Goodwill > Select Next



6. Review summary and select Next
7. In the Payout window > Select 'Leave at customers account' > Select Finish

Payment agreement tab

Gives a summary of how many payment agreements a member has. For example - if a member has two subscriptions set up, one for their membership and one for their personal training sessions they will have two payment agreements displaying in this tab.



The screenshot shows the 'PAYMENT AGREEMENTS' section of a software interface. At the top, there are tabs for 'Account information', 'Payment Agreement' (which is selected and highlighted in orange), 'Payment Requests', and 'Gift cards'. Below the tabs, there is a search bar labeled 'Other payer' with a placeholder 'Search' and several small icons. A checkbox for 'Invoice by email' is checked, and another for 'Show only active agreements' is also checked. The main table displays one active payment agreement:

D...	ID	Clearinghouse	Bank account/Card numb...	Card token	Expiry d...	Ref.	Status	Individual deduction day	Max. de...
<input checked="" type="checkbox"/>	1	Fortnightly DD	923-100-ING Direct-123...			010000002075010001	OK	Thursday (Even Weeks)	

Below the table, there are two sections: 'LOG' and 'I PAY EFT FOR THESE PEOPLE:'. The 'LOG' section contains three entries:

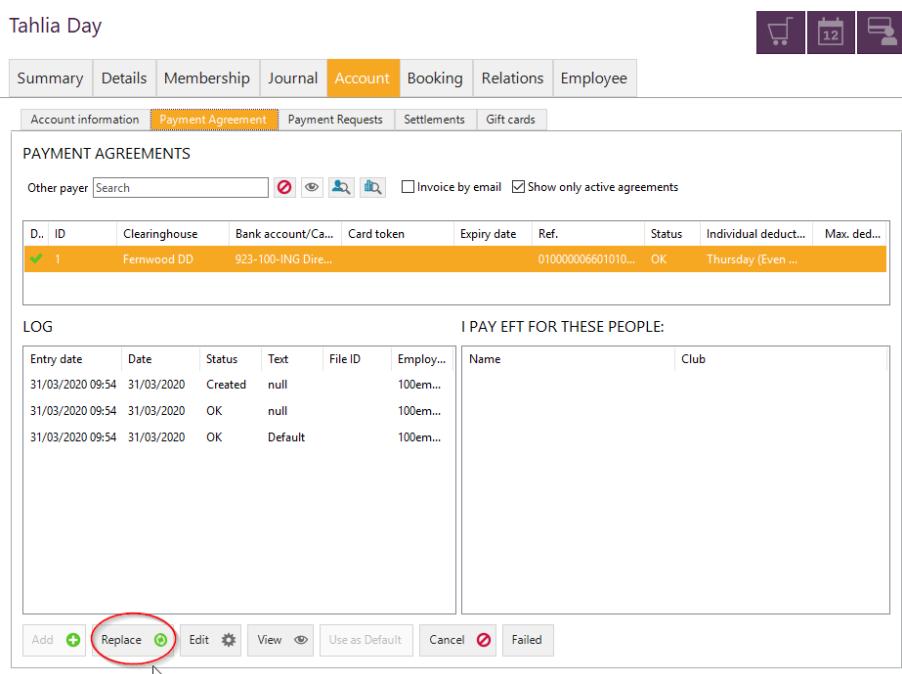
Entry date	Date	Status	Text	File ID	Employee ID
5/12/2019 1...	5/12/20...	OK	Default		100emp603
5/12/2019 1...	5/12/20...	OK	null		100emp603
5/12/2019 1...	5/12/20...	Created	null		100emp603

The 'I PAY EFT FOR THESE PEOPLE:' section is currently empty. At the bottom of the screen are several buttons: 'Add' (with a plus sign), 'Replace' (with a circular arrow), 'Edit' (with a gear), 'View' (with a magnifying glass), 'Use as Default', 'Cancel' (with a red circle), and 'Failed'.

Updating a members direct debit details

Person profile > Account tab > Payment agreement > Replace > Select Bank account or CC details > Complete the details of the new banking details

1. Search for the member > go to their person profile
2. Click on the Account tab > then click on the Payment Agreement tab > Click on Replace



The screenshot shows the 'PAYMENT AGREEMENTS' section of a software interface for a member named 'Tahlia Day'. At the top, there are tabs for 'Summary', 'Details', 'Membership', 'Journal', 'Account' (which is selected and highlighted in orange), 'Booking', 'Relations', and 'Employee'. Below the tabs, there is a search bar labeled 'Other payer' with a placeholder 'Search' and several small icons. A checkbox for 'Invoice by email' is checked, and another for 'Show only active agreements' is also checked. The main table displays one active payment agreement:

D...	ID	Clearinghouse	Bank account/Ca...	Card token	Expiry date	Ref.	Status	Individual deduct...	Max. ded...
<input checked="" type="checkbox"/>	1	Fernwood DD	923-100-ING Dire...			010000006601010...	OK	Thursday (Even ...	

Below the table, there are two sections: 'LOG' and 'I PAY EFT FOR THESE PEOPLE:'. The 'LOG' section contains three entries:

Entry date	Date	Status	Text	File ID	Employee...
31/03/2020 09:54	31/03/2020	Created	null		100em...
31/03/2020 09:54	31/03/2020	OK	null		100em...
31/03/2020 09:54	31/03/2020	OK	Default		100em...

The 'I PAY EFT FOR THESE PEOPLE:' section is currently empty. At the bottom of the screen are several buttons: 'Add' (with a plus sign), 'Replace' (with a circular arrow, circled in red), 'Edit' (with a gear), 'View' (with a magnifying glass), 'Use as Default', 'Cancel' (with a red circle), and 'Failed'.

3. The new payment agreement screen will pop up > select either EFT (bank account) or Credit Card depending on which account the member chooses to use and complete the details as required > Select FINISH.

New payment agreement

New payment agreement

Select agreement type

- EFT (Fernwood DD)
- Invoice
- Credit card (Fernwood CC)

New payment agreement

Create EFT Agreement

Payment cycle

Payment cycle

Individual deduction day

Bank account
Account holder <input type="text" value="DAY TAHLIA"/>
Bank registration number <input type="text" value="923-100"/>
Bank account number <input type="text" value="125555"/>
Bank name <input type="text" value="ING Direct"/>
Bank extra info <input type="text" value="Level 28 60 Margaret Street Sydney NSW 2000"/>

Payment request approval

Require approval

Default follows the system property "Person payment request approval".
Current setting: No approval.

Automatically approve similar amounts

When amount compared to last is between % and %

Previous Cancel

Cancelling a payment agreement

Club Manager Access only

Simply select the payment agreement you wish to cancel and hit the 'cancel' button.

The screenshot shows a software interface for managing payment requests. The top navigation bar includes tabs for 'Account information', 'Payment Agreement', 'Payment Requests' (which is currently selected), and 'Gift cards'. Below the tabs are date filters: 'Last 3 months' dropdown, 'From' field set to '6/09/19', 'To' field set to '5/12/19', and a checkbox labeled 'Show Cancelled'. The main content area is a large, empty table-like space with columns for Deduction, Type, Status, Request..., Total in..., Due date, Open a..., Pai..., Clearing h..., Ref., Collecti..., Rejectio..., Rejected r..., Info, Log date, Clearin..., and Clearin... . At the bottom of the interface are several buttons: 'New request' (highlighted with a dotted border), 'Cancel', 'Register payment', 'Revoke payment', 'View', and 'Resend'.

Booking tab

[View Booking History](#)

The booking tab will show a complete booking history of all bookings that have been made under a members' profile. You can filter by the options below:

- Future bookings
- Old bookings
- Non-showups
- Showups
- Historic bookings
- Review

Jane Smith



Summary Details Membership Journal Account **Booking** Relations

Filter Future bookings From 5/12/19 To 4/01/20

Time	Old bookings	User	Name	Participation status	Misuse status	Interface	M...	Seat	Owner	P...
Future bookings										
Non-showups										
Showups										
Historic bookings										
Review										

View Showup Cancel Cancel punishment No show

Booking restrictions

Relations tab

This tab will display any history and relations that a member has with another member. Whether they be mother and daughter that joined on a girlfriend membership or if they referred by another member.

Company relations = this will display any corporate relationships (if they are a staff member at one of Fernwood's corporate partners)

Transferred and duplicate = This will display any relevant information if there was a member to member transfer.

The screenshot shows the 'Relations' tab of a software application. At the top, there are tabs for Summary, Details, Membership, Journal, Account, Booking, and Relations. The Relations tab is highlighted with a yellow background. Below the tabs is a search bar with fields for 'Referred by' and 'Counsellor', each with its own search button. Underneath the search bar are three buttons: 'Person relations' (highlighted in orange), 'Company relations', and 'Transferred and duplicate'. A dropdown menu titled 'Relation type' is open, showing a list of relation types such as 'All', 'My friend', 'Friends of me', 'My company', etc. To the right of the dropdown is a checkbox labeled 'Include old'. At the bottom of the screen, there are buttons for 'Open' (with a gear icon), 'Create working list', 'Add child' (+), 'Add friend' (+), and 'Remove friend' (-). There is also a checkbox labeled 'Allow friends to book'.

If there is a Fernwood member classified as a minor (under the age of 18) you can also link them to their parent or guardian if they are paying for their subscription. This will also ensure that debt communication for the minor will go directly to their parent/guardian rather than the underage member.

Staff Profile

Add a new Staff Member

Club Manager access only

Select Magnifying glass in the top left hand corner of the screen > Add new lead > Enter their personal details > Select person type STAFF > Assign appropriate staff roles and staff groups.

1. Select the magnifying glass in the top left hand corner of the screen > Select Create lead (refer to page 20 for the full lead process)
2. Enter in the personal details of the staff member
3. On the Relation Window > Select the person type as STAFF. This will give them their employee tab in the person profile.
4. Select finish
5. Once the staff profile is set up, ensure you assign the following:
 - a. Staff Login
 - b. Staff Roles – this will define their access level in Exerp
 - c. Staff Groups – this will ensure they are in pro.mywellness and available for any calendars required.

Relation

Private
 Student
 Staff

Every person that is employed in Club. All persons of this type have an additional Employment-page added to their profile

Friend
 Corporate
 One man corporate
 Family
 Senior
 Guest
 External staff



Previous Finish Cancel

Exerp staff log-in

Person profile > Employee tab > Under the Logins section, select ADD > Select Club (will default to your home club) > Select OK.

A unique code is then generated for each staff member which is linked to sales transactions, subscriptions, bookings, reporting etc.

1. In the staff members profile, go to the Employee tab > Under the LOGINS section > Click ADD.

Tahlia Day

ID	Center	Expiry date	Blocked	API	Log date

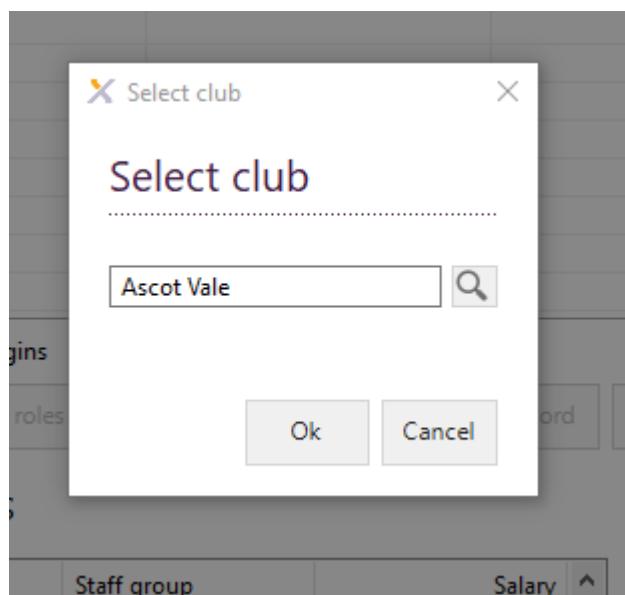
Show blocked logins

Add View roles Assign roles Change password Block

DETAILS

Employee since Allow friends
Staff external Id
Shoe size
Shirt size
Trouser size
Email
Phone
Title

2. Choose the club (this will default to your own club). Select OK.



3. Once you have created the login – ensure you reset the password so they can log in easily for the first time. We recommend updating this Fernwood1.

The first time the staff member logs into Exerp they will be prompted to reset their password and create their own.

Tahlia Day

Summary Details Membership Journal Account Booking Relations Employee

LOGINS

Show blocked logins

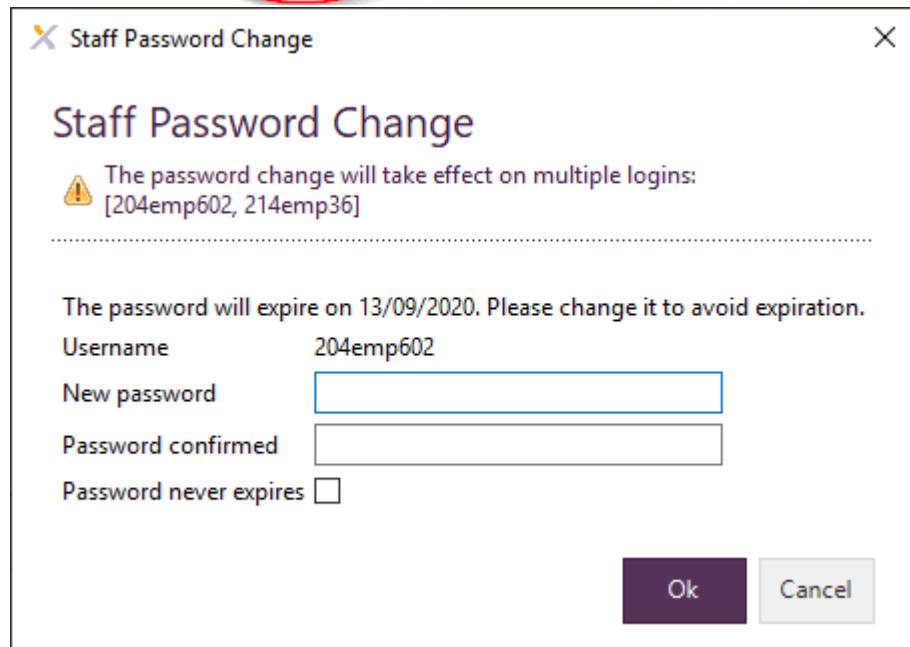
Add

[View roles](#) 

Assign roles 

[Change password](#)

 Block 



This will generate their staff login credentials for Exerp. A staff member can use the below 3 options when logging in to Exerp.

1. Email
 2. Full Exerp ID e.g. 100emp206

- Last 3 digits of their Exerp ID e.g. 206

Add staff roles

Search for staff member in the system > Open up their person profile > Employee Tab > Assign Roles

- Search staff member by clicking on the magnifying search glass in the top left hand corner of the menu bar.



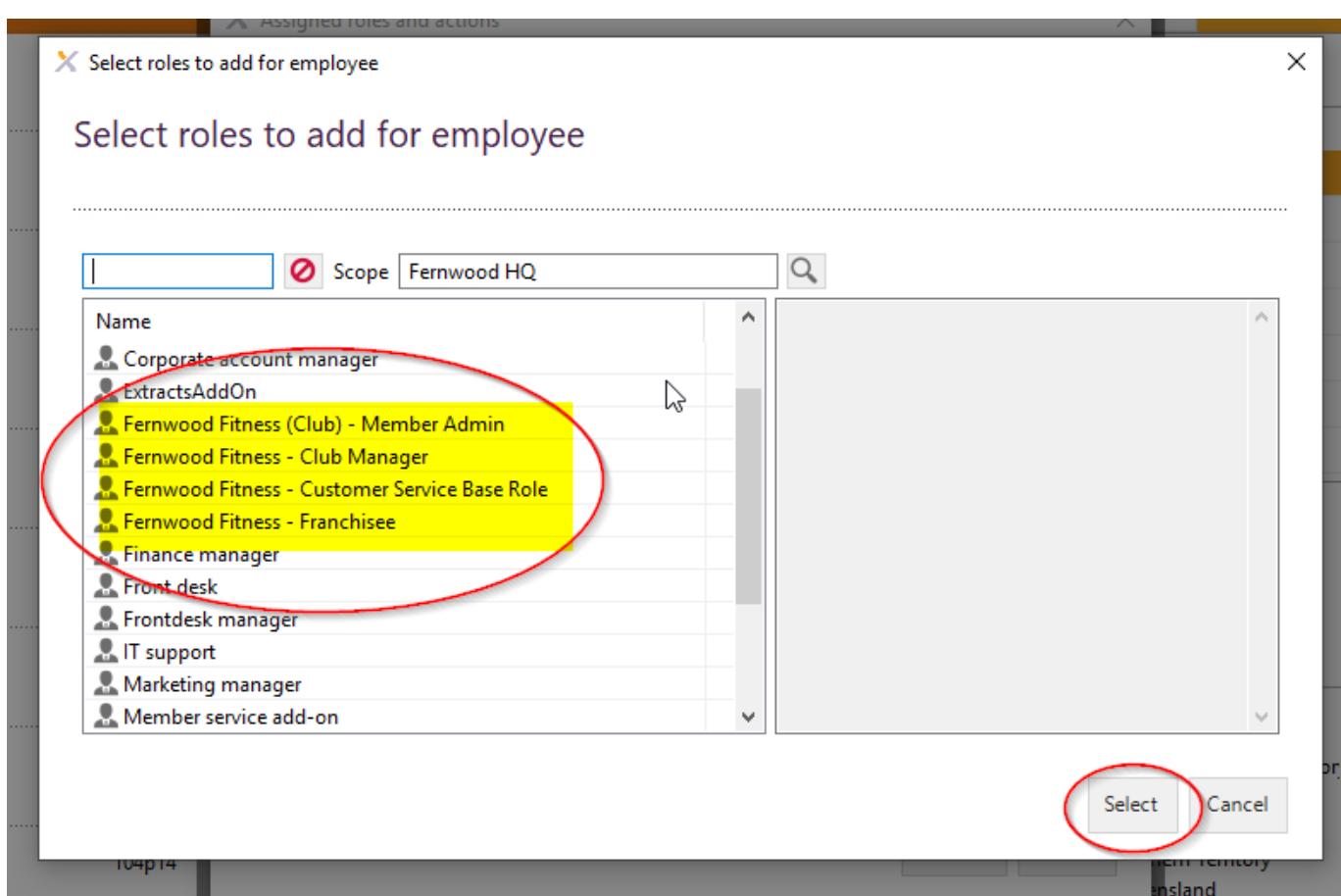
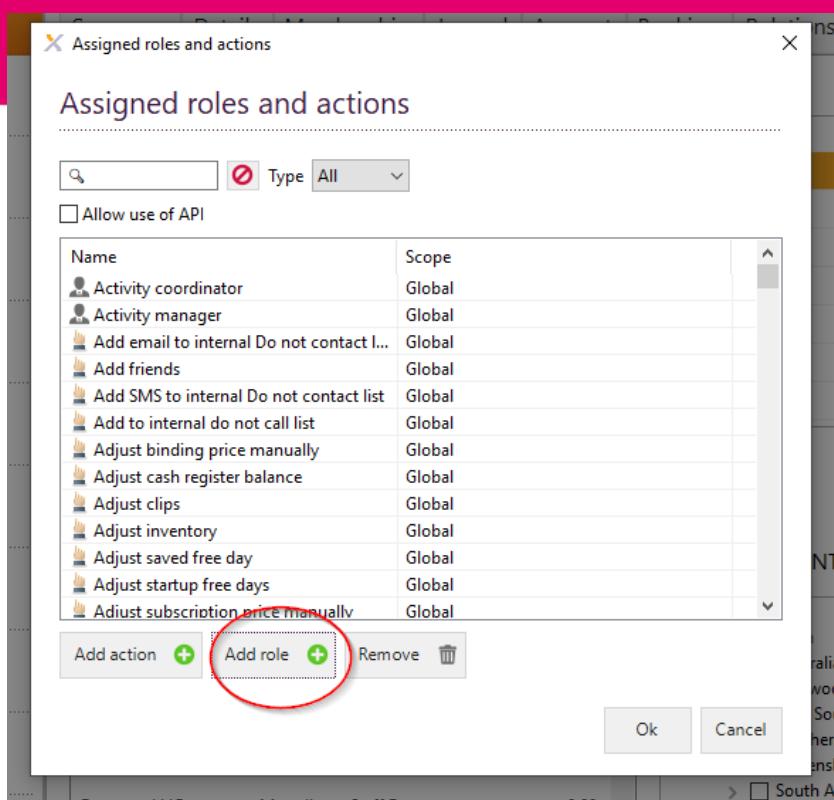
- Type in member name or last 3 digits of their ID number to find staff member.

- Click on the employee tab in staff members' profile

The screenshot shows a staff member's profile page for Naomi Mikic. The top navigation bar has tabs: Summary, Details, Membership, Journal, Account, Booking, Relations, and Employee (which is highlighted). Below the tabs are sections for LOGINS and DETAILS. The LOGINS section shows a table with columns: ID, Center, Expiry d..., Blocked, API, and Log date. The DETAILS section contains various fields like Employee since, Staff external Id, Shoe size, Shirt size, Trouser size, Email, Phone, and Title. At the bottom of the page, there are buttons for Add, View roles, Assign roles, Change password, and Block.

The screenshot shows the STAFF GROUPS and SUBSCRIBED CENT sections. The STAFF GROUPS section has a table with columns: Scope, Staff group, and Salary. The SUBSCRIBED CENT section shows a tree structure with 'System' selected. At the bottom of each section are 'Add', 'Edit', and 'Remove' buttons.

- Click on the assign roles button
- Select the appropriate role for the staff member to add it to their profile.



Each role in Exerp will have a different level of permission and certain actions they will be able to perform in Exerp. For example override access for certain processes will only be available for the Club Manager role.

The four roles we have set up in Exerp equate to the following:

Fernwood Fitness Customer Service Restricted Role:

- Restricted access in the system
- Can process basic tasks in Exerp such as process items through the front desk, updated personal details and process bookings

Fernwood Fitness Customer Service Role:

- Access to do all basic processing in club through the front desk, process membership sales, manage bookings in the calendars.
- Process basic admin tasks such as freezes & cancellations

Fernwood Fitness (club) Member Admin Role:

- Access to do all basic processing in club through the front desk, process membership sales, manage bookings in the calendars.
- This role includes pricing override access to things like membership pricing, joining fee, freeze and cancellation fees etc.

Fernwood Fitness Club Manager:

- Access to do all processing in club through the front desk, process membership sales, manage bookings in the calendars.
- This role includes pricing override access to things like membership pricing, joining fee, freeze and cancellation fees etc.
- This role includes access to all required reports for Club Manager role

Fernwood Fitness Franchisee:

- Access to do all processing in club through the front desk, process membership sales, manage bookings in the calendars.
- This role includes pricing override access to things like membership pricing, joining fee, freeze and cancellation fees etc.
- This role includes access to all required reports for the Franchisee role

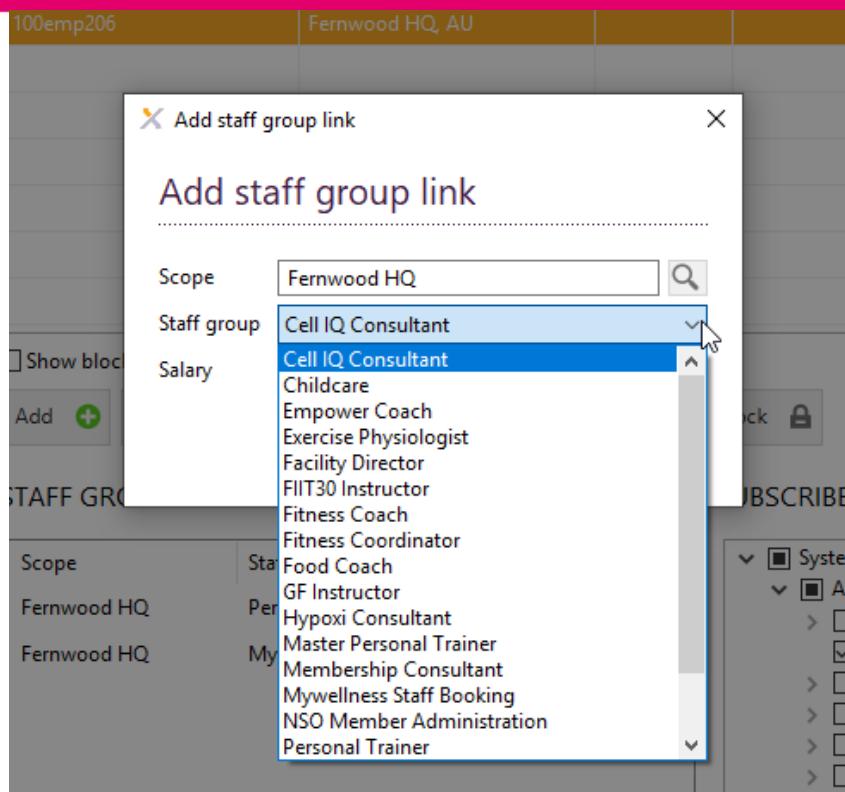
Add a staff group

Search for staff member in the system OR create a new staff (lead) > Employee Tab > Staff Groups > Add > Select the staff group(s) relevant to that staff member.

IMPORTANT: You will need to set this up for every staff member in Exerp so that they can be linked to any bookings and calendars in Exerp and pro.mywellness. i.e. Fitness Coach Staff Group needs to be assigned to all Fitness Coaches and Membership Consultant staff group be assigned to all Membership Consultants so they can assigned Sales shifts and availability.

1. Find the staff member's profile in Exerp > go to their Employee tab > Click Add underneath the Staff Group heading

2. Choose the relevant staff role (group) for that staff member from the drop down displayed > click SAVE



Staff Mapping from Exerp to Pro.Mywellness

Exerp Staff Group

- Facility Director
- Fitness Coordinator
- GF Instructor, FIIT30 Instructor, Reformer Pilates Instructor, Wellness Instructor, Mywellness Staff Booking
- Food Coach
- Fitness Coach
- Master Personal Trainer, Personal Trainer
- Exercise Physiologist
- Membership Consultant
- Reception Staff

Pro.Mywellness Role

- Facility Director
- Fitness Director
- Class Instructor
- Coach
- Fitness Instructor
- Personal Trainer
- Exercise Physiologist
- Sales
- Receptionist

Setting up Staff in Pro.mywellness

To set a staff member up in pro.mywellness, they will need to be set up as a staff member in Exerp first. Once they are set up in Exerp, it is **crucial** that you assign all staff members the **Mywellness Booking Staff Group** in Exerp so that they are pushed through to pro.mywellness as well.

By assigning this staff group it sets them up in pro.mywellness with a matching profile.

How to change a staff members' password

Club Manager access only

1. Click on employee tab under the staff profile



2. Click on change password tab to update password

3. Enter in new password details and click on OK to finish

The screenshot shows a software interface with a navigation bar at the top containing tabs: Summary, Details, Membership, Journal, Account, Booking, Relations, and Employee. The Employee tab is highlighted with a yellow background. Below the navigation bar is a section titled "LOGINS". A table titled "LOGINS" displays a single row of data. The columns are: ID (100emp603), Center (Fernwood HQ, AU), Expiry d... (26/05/2...), Blocked (empty), API (empty), and Log date (3/12/20...). Below the table is a checkbox labeled "Show blocked logins". At the bottom of the screen are several buttons: Add (+), View roles (key icon), Assign roles (gear icon), Change password (key icon), and Block (lock icon).

Staff Password Change

The password will expire on 26/05/2020. Please change it to avoid expiration.

Username 100emp603

Current password

New password

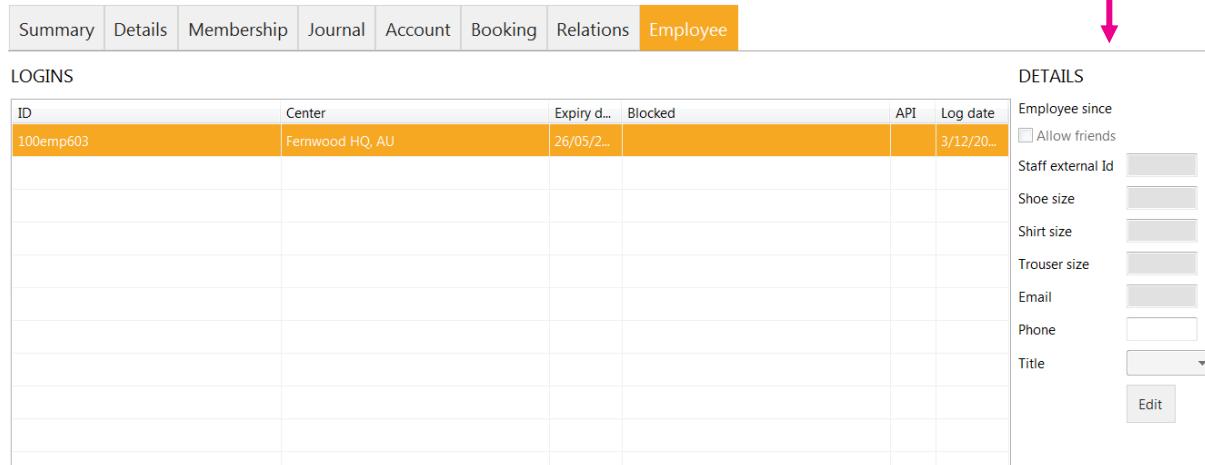
Password confirmed

Ok

Cancel

Staff uniform details

You can keep a record of staff uniform sizes under the employee tab of each individual staff member. Search the staff member, click on the employee tab under their name and enter in uniform details on the right hand side of the screen



Summary	Details	Membership	Journal	Account	Booking	Relations	Employee
LOGINS							
DETAILS							
ID	Center	Expiry d...	Blocked	API	Log date	Employee since	
100emp603	Fernwood HQ, AU	26/05/2...			3/12/20...	<input type="checkbox"/> Allow friends	
						Staff external Id	
						Shoe size	
						Shirt size	
						Trouser size	
						Email	
						Phone	
						Title	<input type="button" value="Edit"/>

Staff discounts

Fernwood National Support Office has set up the standard 30% discount code for all staff members in every club. Every purchase that gets processed through the Front Desk (includes all services) will automatically apply the 30% staff discount to the sale.

Cash Register App

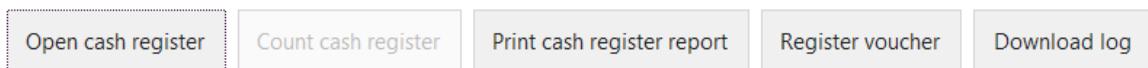
Open Cash Register - Start of Day Process

Cash Register App > Open Cash Register > Enter the float amount > Check for any differences > FINISH

1. Click on menu tab in the top left hand side of the screen and click on 'Cash register' app



2. Click on 'Open cash register' button in the bottom left hand side of the cash register screen



3. Enter in all notes and coins for the float amount (2 x \$10 notes – put the number 2 under \$10 note etc). Select 'Next' to continue.

Open cash register

Count the number of coins and notes in cash register

\$100	\$50	\$20	\$10	\$5	Total	
Count number of notes	<input type="text"/>	<input type="text" value="1"/>	<input type="text" value="4"/>	<input type="text" value="6"/>	<input type="text" value="5"/> 215.00	
\$2	\$1	50¢	20¢	10¢	5¢	Total
Count number of coins	<input type="text" value="5"/>	<input type="text" value="6"/> 6	<input type="text" value="11"/>	<input type="text" value="10"/>	<input type="text" value="10"/>	<input type="text" value="25.00"/>

Total amount counted

Read the total amount of credit card transactions on the credit card terminal

Enter credit card total





4. Confirm the next screen by clicking on 'Finish'. Please note that if the float amount entered is different from set float amount in system, you will need to type in a reason or return to the previous screen to re-enter correct data.

Confirm

Ready to open cash register for today.

The system will print the report when finished.

Please note that this cannot be undone

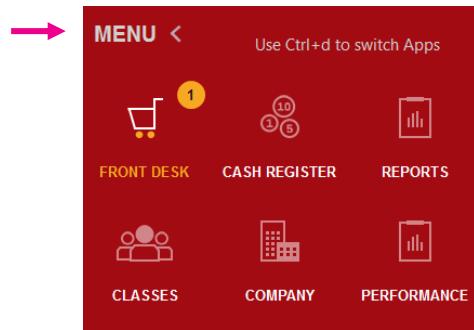


Previous **Finish** Cancel

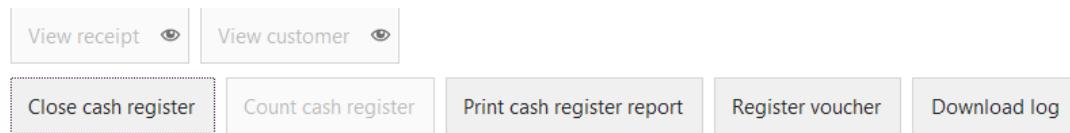
Close Cash register - End of day process

Cash Register App > Close Cash Register > Enter the cash amount found in the register > Reconcile
ETPOS > Check for any differences > Confirm Bank Transfer amount > FINISH

1. Click on menu tab in the top left hand side of the screen and click on 'Cash register' app



2. Select close cash register in the bottom left hand side of the screen



3. Enter in all cash amounts that you have on hand as well as EFT total transaction amount (taken from your EFT machine totals). Click on 'Next' to continue.

Close cash register X

Close cash register

Count the number of coins and notes in cash register

\$100	\$50	\$20	\$10	\$5	Total		
Count number of notes	1	1	1	1	185.00		
	\$2	\$1	50¢	20¢	10¢	5¢	Total
Count number of coins	1	1	1	1	1	3.85	

Total amount counted 188.85

Read the total amount of credit card transactions on the credit card terminal

Enter credit card total 200.00

Next Cancel

4. **Cash difference screen** will then appear which will explain any differences in the cash register (if any) and ask for a reason. Click on next.

Close cash register X

Cash difference

	Registered	Counted	Difference
Cash	374.00	188.85	-185.15
Credit card	0.00	200.00	200.00
Total	374.00	388.85	14.85

View details

Difference reason Test figures

Previous Next Cancel

5. **Cash Transfer** screen will appear. Fill in the fields of what is physically being banked for day. This will give you a balance of what is left in the register which should be your float for the next day. Click next & Confirm.

6. **Bank slip identifier:** Enter your bank slip reference number from your bank deposit book (if applicable) in this field. This will allow you to search and see who processed this end of day and if there are any discrepancies.

 Close cash register 

Cash transfer

Total in cash register	188.85
Amount to transfer in notes	10.00
Amount to transfer in coins	10.00
Total transfer amount	20.00
Left in cash register	168.85
Place to transfer to	Bank/Safe 
Bank slip identifier	1000000

 Previous  Next  Cancel

Confirm

Ready to close cash register for today.

The system will print the report when finished.

Please note that this cannot be undone

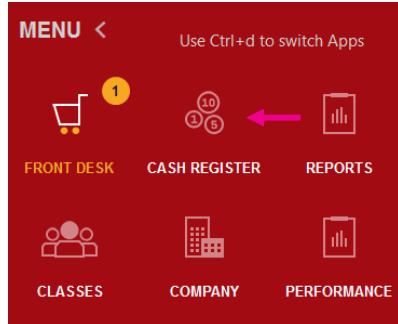
Previous Finish Cancel

Count Cash Register

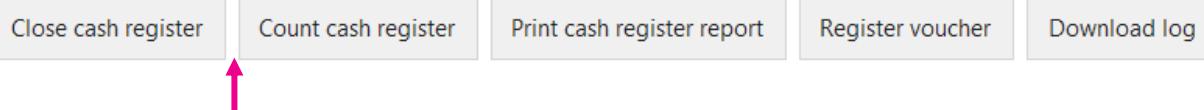
Cash Register App > Count Cash Register > Enter the float amount > Check for any differences > FINISH

Count Cash Register should be used when balancing cash register between shifts and before closing the cash register at the end of the day.

1. Click on the 'Menu' button on the top left hand side of the screen and select 'Cash register app'



2. Now click on 'Count cash register' button in the bottom left hand side of the screen



3. Enter in all notes, coins and EFT totals. Select 'Next' to continue if all totals balance

Count the number of coins and notes in cash register

\$100	\$50	\$20	\$10	\$5	Total
Count number of notes	<input type="text"/>				
\$2	\$1	50¢	20¢	10¢	5¢
Count number of coins	<input type="text"/>				

←

Total amount counted

Read the total amount of credit card transactions on the credit card terminal

Enter credit card total ←

→ Next Cancel

4. On the next screen you will be asked to enter a reason in if there is a difference with what was registered and what was counted. Enter in reason and click on 'Next' to proceed.

Cash difference

	Registered	Counted	Difference
Cash	273.85	686.20	412.35
Credit card	120.00	120.00	0.00
Total	393.85	806.20	412.35

View details

→ Difference reason ↓

Previous Next Cancel

5. The next screen will ask you to confirm the figures. Click on 'Finish' if you are happy with what you have entered.

Confirm

Ready to adjust cash register.

The system will print the report when finished.

Please note that this cannot be undone

Previous

Finish

Cancel

How to export all sales for the day (including break-down of transactions) into an Excel spreadsheet

You can pull a report straight into Excel for all of your transactions made in a day or cash register session.

1. Go into the Cash Register App in Exerp
2. Check the dates of your cash register session to make sure it is accurate for what you are looking for
3. Right click on the data and choose Save to Excel

4. Once you have pulled it into Excel, you notice 2 tabs along the bottom of the spreadsheet
 - a. **Transactions:** Will give you summary of the transaction that was made against the member (usually their first line item), how much the total sale was and whether they paid by cash, credit card (EFTPOS), payment account (adjustment made to their account such as a freeze) or if it's been added to their instalment plan account.
 - b. **Transaction lines:** This break down each item that was put through on the transaction and how much it cost e.g. 1 x Yoga Mat, 1 x 12 Month Membership Ongoing. It will also include the staff member and member.
PLEASE NOTE: VAT refers to GST. I would recommend hiding these columns.

PLEASE NOTE: VAT refers to GST. I would recommend hiding these columns.

Planning App

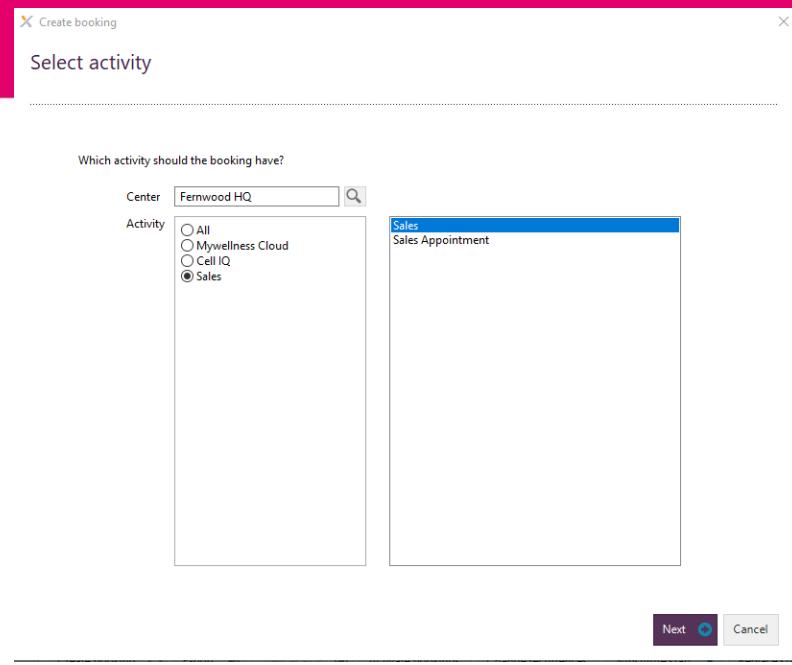
Opening a shift time

Planning App > Create Booking > Select Activity > Choose the working date and time > Select staff member > Define the recurrence > Review booking summary > FINISH

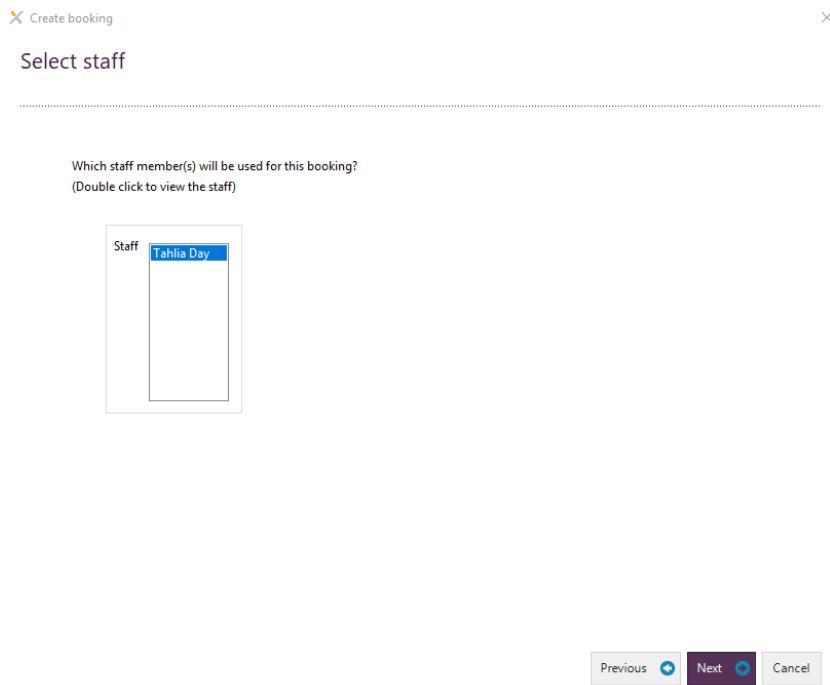
1. Open the Planning App and click 'Create Booking'

The screenshot shows the 'Planning App' interface. On the left is a vertical menu bar with icons for Search, Menu, To-Dos, Cash Register, Company, Planning, Child Care, and Access Points. The 'Planning' icon is highlighted. The main area is titled 'CHILD CARE' and shows a calendar for January 2020. A specific date, January 27, is highlighted in orange. The right side of the screen displays a timeline from 4:00 PM to 11:00 PM. At the bottom, there is a toolbar with several buttons: 'Create booking' (highlighted with a red circle), 'Export', 'View as PDF', 'Activate bookings', 'Change recurrences', 'Substitute staff', and 'Replace staff'. The 'Create booking' button is the primary focus.

2. Select the activity you are wanting to open a working time for



3. Choose date and time of shift
4. Select the staff member working this shift



5. Define the recurrence of the shift i.e. once off or every Monday and Thursday for 3 months



Should this booking occur several times?

No, just once

Yes, Weekly

Repeat every Week for Week Create 80 recurrent bookings

Until Monday

Monday
 Tuesday
 Wednesday
 Thursday
 Friday
 Saturday
 Sunday

6. Review booking summary and add in any comments for the staff if required i.e. Target of 3 gym floor referrals, Select FINISH.

Booking summary

<p>Basic</p> <p>Center Fernwood HQ Activity Sales Name Sales Description <input type="text"/></p> <p>Staff</p> <p>Staff Tahlia Day</p> <p>Time</p> <p>Start 28/01/2020 - 9:00 AM Stop 28/01/2020 - 8:00 PM Duration 660 Recurrence Every 1 week on each monday, tuesday, wednesday, thursday until 2020-06-15</p>	<p>Comment</p> <p>Ensure gym floor is cleaned in between clients.</p> <p>Options</p> <p><input type="checkbox"/> Activate after finish <input type="checkbox"/> Send confirmation message to the participants</p>
--	--

Previous Finish Cancel

Calendar App

Complimentary sessions

Complimentary sessions will be allocated to new members post-joining. Once they have been allocated to a member's account they will have an expiry of 30 days. Please see below the possible complimentary sessions a member can receive, depending on your club's offerings.

- Personal Training
- FIIT30
- Reformer Pilates
- Food Coaching
- Wellness Wednesdays
- Wellness

Adding a Complimentary Session to a members' profile

Person App > Search member > Membership Tab > Clip Cards > New > Select Product Group i.e. Personal Training > Select Comp Session > Process through the cash register.

To add a complimentary clip card to a members' profile, follow these steps below:

1. Search the members' name by clicking on the magnifying search glass in the top left hand side of the screen and then click on advanced search. Type in at least the first 3 letters of the first and last name to search the member. Now click on find. Select the member you want to book a session for and click "open"



2. Click on the 'Membership' tab, followed by 'Clipcards' tab and then select 'New'

A screenshot of a software interface showing a member's profile for "Dianna Princessofwales". At the top, there are three tabs: "Summary" (gray), "Details" (gray), and "Membership" (orange, indicating it is selected). Below these are four sub-tabs: "Subscriptions" (gray), "Clip cards" (orange, indicating it is selected), "Privileges" (gray), and "Privilege usages" (gray). A checkbox "Include old clipcards" is checked. The main area is titled "PURCHASES" and contains a table with columns: Name, Center, Assigned staff, Clips, Start, Stop, and State. Below the table are several buttons: "New" (green plus icon), "Adjust clips" (gear icon), "Adjust stop date" (gear icon), "Edit assigned staff" (gear icon), "Transfer clip card" (blue square icon), and "Credit clips" (blue square icon).

3. Select 'Personal Training' for the product group and then select PT comp session below. Click on 'Select'

Clip card selection

The screenshot shows a software interface for selecting clip cards. At the top, there's a navigation bar with 'Center' (set to 'Fernwood HQ'), a search icon, and a dropdown for 'Product group' (set to 'Personal Training'). A pink arrow points to the 'Product group' dropdown. Below it is a table with columns: Name, Product group, Assigned staff gro..., Clips, Duration, Normal... . The table lists several session types, each with a yellow header row. A pink arrow points to the first row, 'PT Comp Session'. At the bottom left is a dropdown for 'Assign staff:' with a pink arrow pointing to it. On the right side, there are 'Select' and 'Cancel' buttons, with a pink arrow pointing to the 'Select' button.

Name	Product group	Assigned staff gro...	Clips	Duration	Normal...
PT Comp Session	Clipcards	None	1	6 mont...	0.00
PT Pack - 1 Session	Personal Training	None	1	6 mont...	45.00
PT Pack - 10 Session...	Personal Training	None	10	6 mont...	420.00
PT Pack - 100 Session...	Clipcards	None	100	6 mont...	0.00
PT Pack - 15 Session...	Personal Training	None	15	6 mont...	615.00
PT Pack - 20 Session...	Personal Training	None	20	6 mont...	800.00
PT Pack - 3 Sessions	Personal Training	None	3	6 mont...	130.00
PT Pack - 5 Sessions	Personal Training	None	5	6 mont...	215.00

Assign staff:

→

4. The cash register will automatically pop up with 1 Comp PT sessions at \$0.00 and will save this session under the 'Clipcards' tab under the members' profile. You will now see 1 Comp PT session on the members' account, which will be valid for 6 months.

Dianna Princessofwales



The screenshot shows a member profile for 'Dianna Princessofwales'. At the top, there's a navigation bar with tabs: Summary, Details, Membership (highlighted), Journal, Account, Booking, Relations. Below it is a sub-navigation bar with tabs: Subscriptions, Clip cards (highlighted), Privileges, and Privilege usages. Under 'Membership', there's a section titled 'PURCHASES' with a checkbox 'Include old clipcards'. A table lists a single purchase: 'PT Comp Session' from 'Fernwood HQ' with 'None' assigned staff, 1 clip, starting today at 00:00 and ending on 2/07/2020 at 12:00 AM, and an 'Active' state.

[Book a complimentary session](#)

To book in a complimentary PT session follow these steps below:

1. Search the members' name and open profile

2. Select 'Activities', followed by the 'Personal Training' tab under 'Book'

The screenshot shows a software interface with a sidebar on the left labeled 'Dianna Princessofwales' with a user icon and a 'MORE' link. Below the sidebar is a 'ACCESS' button. At the top, there are tabs for 'PRODUCTS' and 'ACTIVITIES'. A pink arrow points to the 'ACTIVITIES' tab. To the right of the tabs, there are two main sections: 'ATTEND' and 'BOOK'. The 'BOOK' section is expanded, displaying a list of session types: Fitness Coach, Food Coaching 15 Mins, Food Coaching 30 Mins, Master Personal Training Session, Personal Training, and Sales Appointment.

3. Enter in instructor's name (personal trainer), duration, start time of session and then type in any comments relating to the session. Select 'Book' to schedule in PT session.

Personal Training

→ Participant: Dianna Princessofwales

→ Instructor: Unassigned

Duration: 30 minutes

→ Start time: 2/01/2020 2:18 PM

Comments: Comp PT session - new member that has had a knee operation in the past

4. Booked PT session will show up under the 'Booking' tab in the members' profile.

Booking a Member into a class via Exerp

Calendar App > Classes > Group Fitness > Double click on the class > Book Participant > Search for the member > Select BOOK.

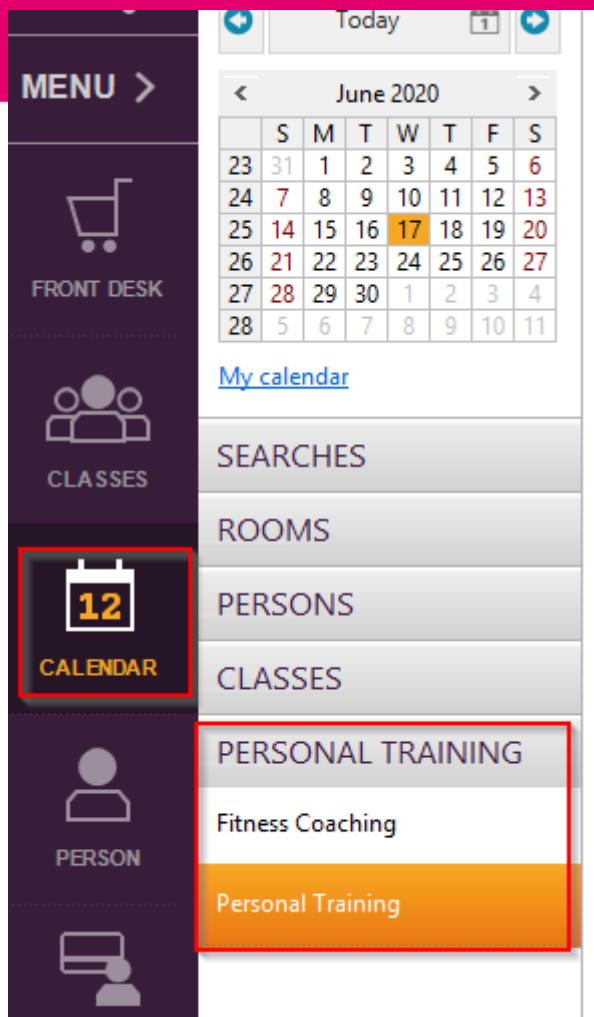
1. Go to the Calendar App in Exerp > Under the searches, make sure you have selected the correct service i.e. Group Fitness, Sales, Personal Training, Fernwood Trainer etc.
2. Find your class you want to book the member in for and double click on the class.
3. Select **Book Participant** > Search for the member > Choose Book and the member will be successfully booked into that class.

The image shows the Exerp app interface. On the left is a sidebar with icons for MENU, FRONT DESK, CLASSES, CALENDAR (selected), PERSON, and SEARCHES. The CALENDAR section shows a calendar for June 2020 with a specific session highlighted. The main area displays a 'GROUP FITNESS' schedule for Monday, June 22, from 12:00 PM to 4:00 PM. Sessions include 'Gym Floor Session' at various times with participants like Sherilee Chaffer. A 'Book participant' dialog box is open over the schedule, showing 'Wise Hour' as the class and 'Tahlia Day' as the participant. Buttons for 'Book', 'Book and show up', and 'Cancel' are visible.

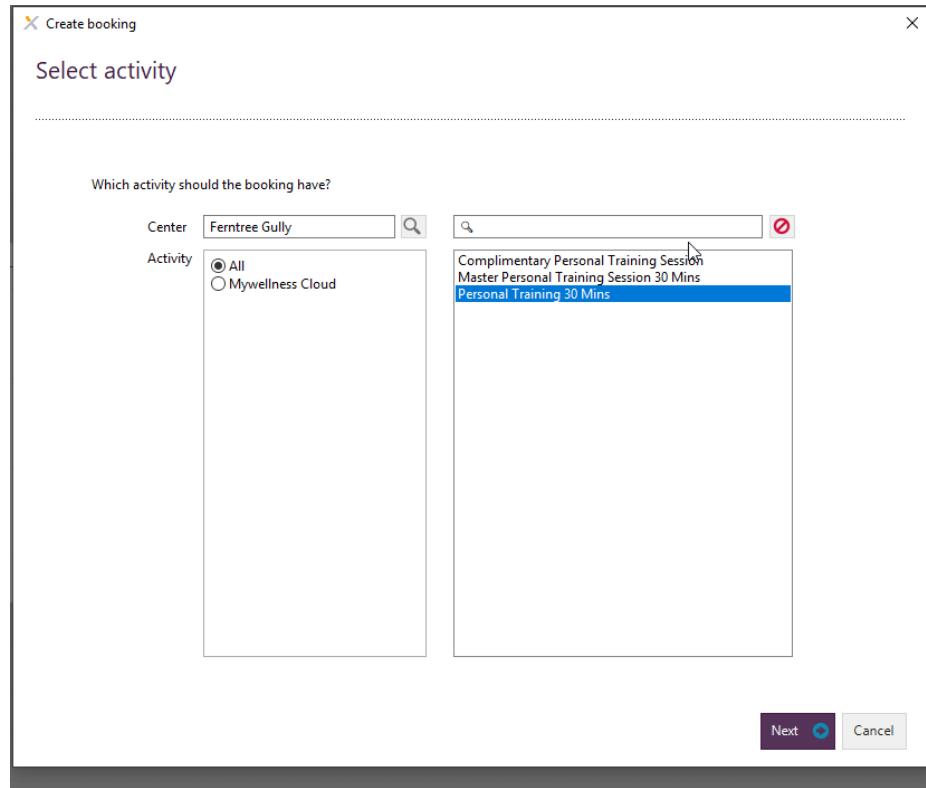
Time	Session	Description
12:00 PM	Gym Floor Session	12:00 PM, Sherilee Chaffer, Gym Flo
1:00 PM	Gym Floor Session	1:00 PM, Sherilee Chaffer, Gym Flo
2:00 PM	Gym Floor Session	2:00 PM, Sherilee Chaffer, Gym Flo
3:00 PM	Gym Floor Session	3:00 PM, Sherilee Chaffer, Gym Flo
4:00 PM	Gym Floor Session	4:00 PM, Sherilee Chaffer, Gym Flo

Making a reoccurring PT Booking

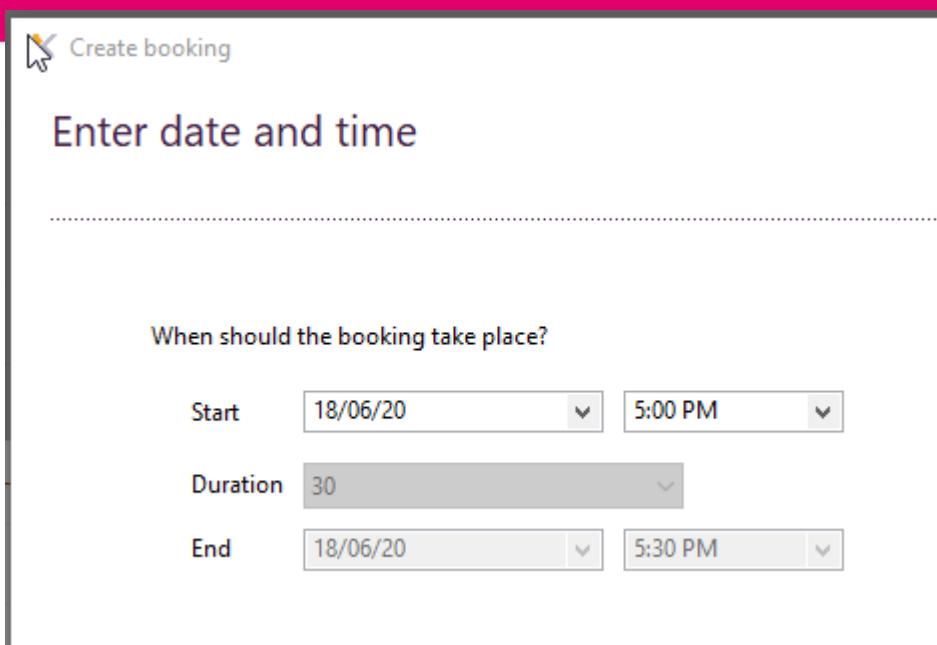
1. Set up your staff availability in Pro.MyWellness
2. Go to **Exerp** > Calendar App
3. Make sure you select the Personal Training calendar in the App



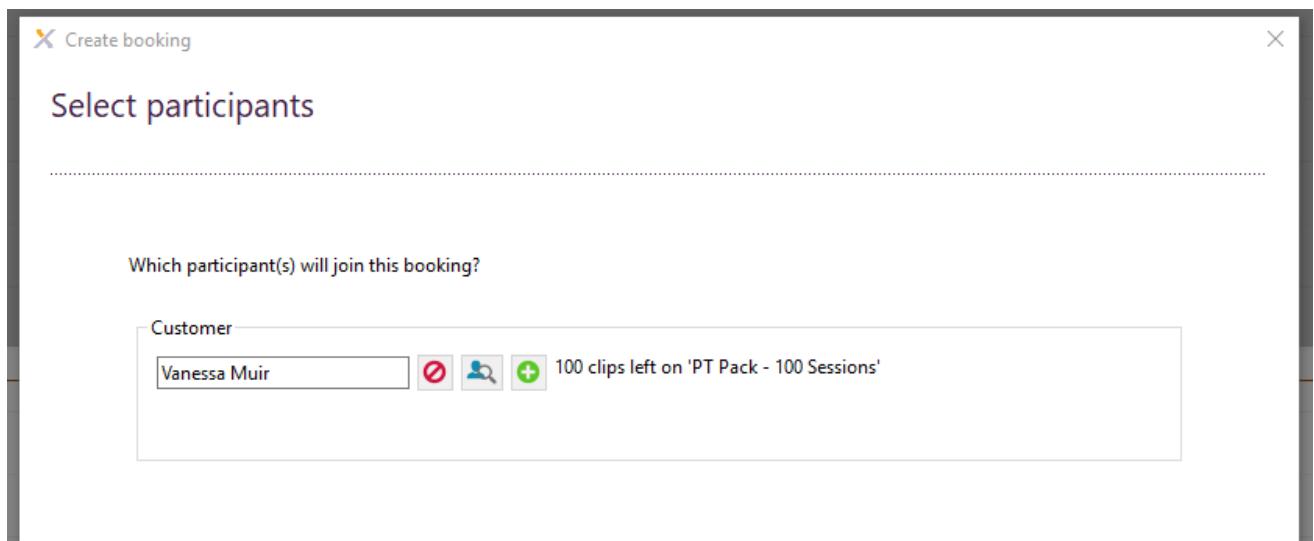
4. Click Create Booking or double click on the available time in the calendar
5. Select Personal Training 30 Mins as your activity > Next



6. Choose the time of the booking > Select Next

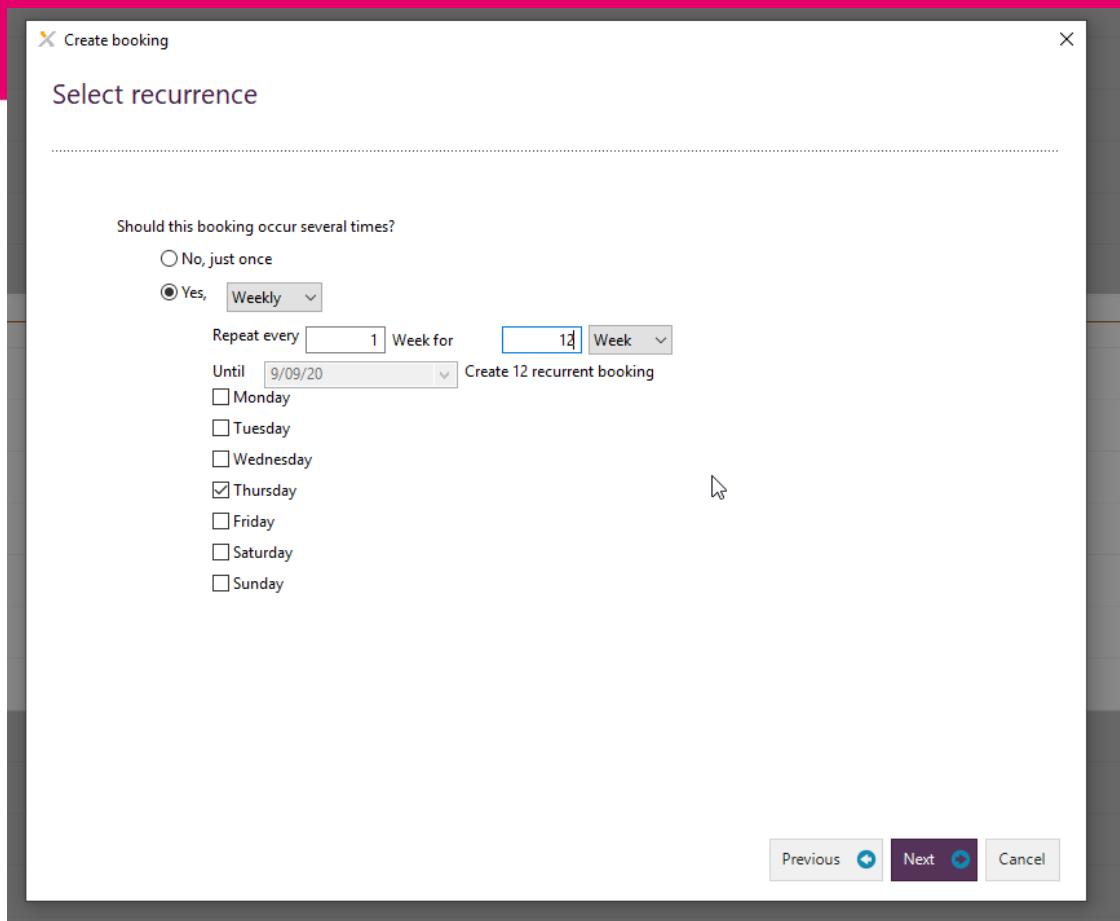


7. Select your member > this will display how the member is paying for their session. If they need to purchase anything or be assigned a complimentary PT session you can from this



screen > Select Next

8. Select your **recurrence** of how many weeks you wish to book this spot for.



9. Review your summary of the booking, add any additional comments and click Finish.
10. Your booking will be displayed in Pink in the calendar. This will also sync through Pro.mywellness.

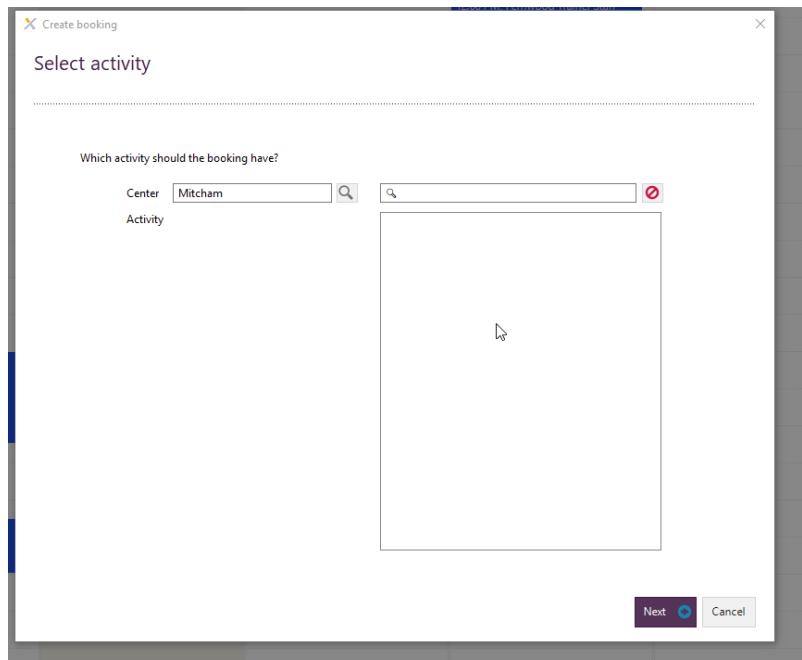
Booking a Fernwood Trainer Appointment

Before we can take any bookings in the Fernwood Trainer calendar we need to make sure we have set up the below:

- All staff members that are in the role Fernwood Trainer / Member Motivator role MUST be allocated the staff group **Fernwood Trainer** in their Exerp staff profile
 - The shift times must be opened up in the Planning App in Exerp (refer to Planning App chapter > Opening a shift time)
1. Go to the Calendar App in Exerp > Under Searches, select Fernwood Trainer

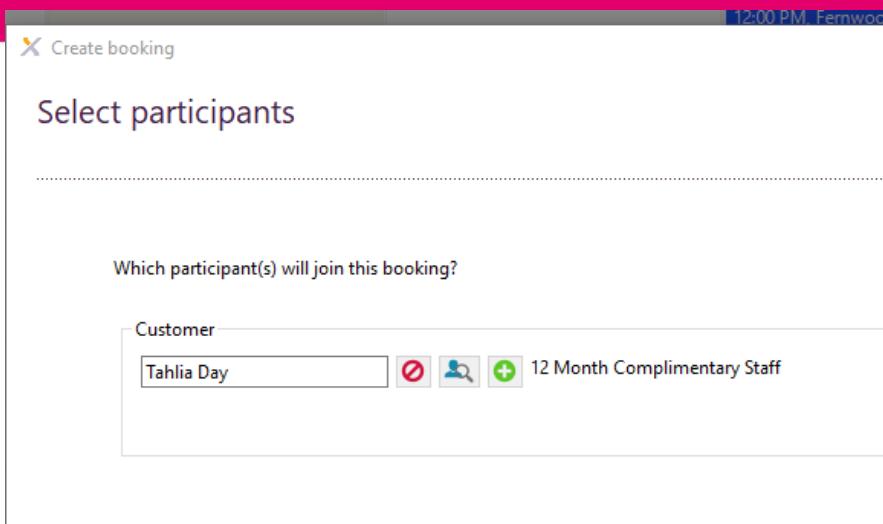
The screenshot shows the Exerp software interface. On the left, there is a vertical menu bar with icons for Search, Front Desk, Classes, Calendar (highlighted in orange), Person, and Membership Sale. The main area displays a calendar for June 2020. A red box highlights the 'SEARCHES' section in the sidebar, which contains options like Cell-IQ, Fernwood Trainer (selected and highlighted in orange), Food Coaching, Hypoxi, MWC Combined Classes, MWC Combined Staff, Sauna, and Fernwood Session Pass. To the right of the calendar, a specific appointment for 'Megan Ronan' is shown in a blue box, indicating '5:00 PM, Fernwood Trainer Staff Availability'.

2. Click on Create Booking on the bottom left corner of the calendar
3. A new booking window will come up > Select Next on the first screen
 - a. This displays blank as there is one type of appointment you can book in for with the Fernwood Trainer so it defaults to this appointment type



4. Enter the date/time and duration of the booking > Select Next

- Search and select the member that you are booking in > Select Next



- Choose the staff who is taking the shift > Select Next
- The Booking Summary will come up where you can add some notes about the member for the staff member's reference
- The appointment will save and you will be able to view their appointments in the Calendar App.

The left screenshot shows a calendar interface with a blue box highlighting 'Kate Watson' availability at 5:00 PM. The right screenshot shows the 'Booking summary' window with the following details:

Basic	Center: Mitcham
	Activity: Health Wellness Check-In
Name	Health Wellness Check-In
Description	(empty)
Participants	Customer Tahlia Day
Staff	Staff Kate Watson
Time	Start: 23/06/2020 - 5:15 PM Stop: 23/06/2020 - 5:30 PM Duration: 15 Recurrence: None
Comment	Needs to complete their Health Screen Questionnaire
Options	<input checked="" type="checkbox"/> Activate after finish <input checked="" type="checkbox"/> Send confirmation message to the participants

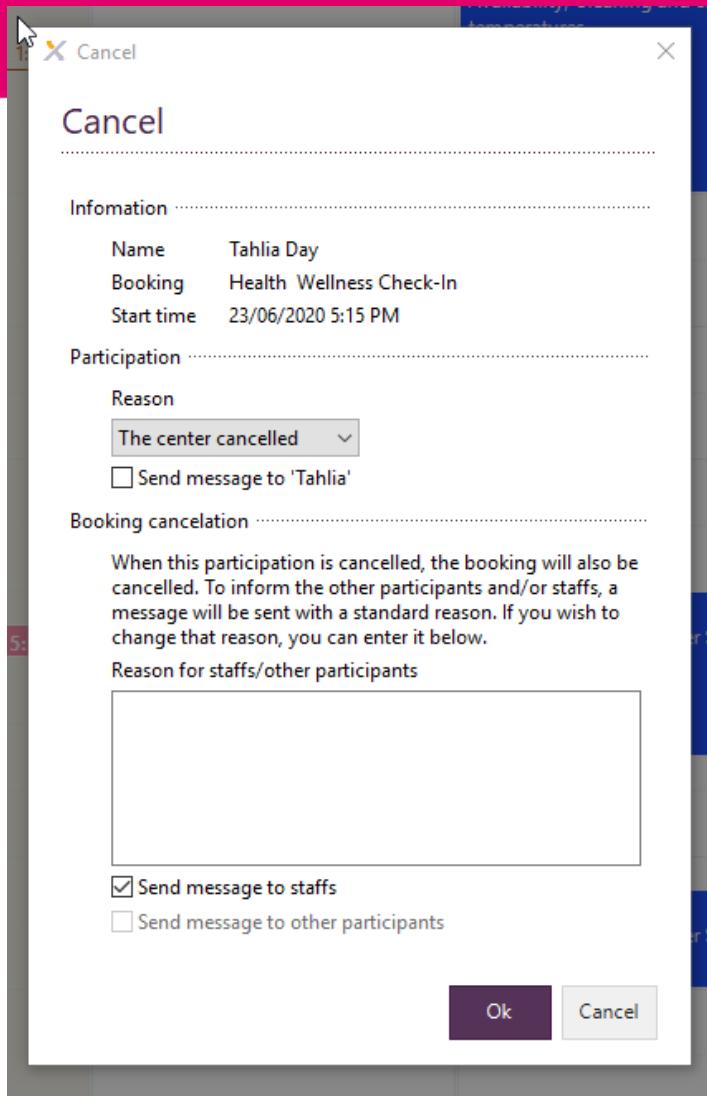
Cancelling a member from a booking in Exerp

To cancel a member from a class or appointment in Exerp, the same steps as per below apply.

- Go to the Calendar App and find the members appointment or class
- Double click on the appointment
- A new little window will come up > Select Cancel '[member's name]



4. A cancel window will come up with a summary of the cancellation. Here you can either select **member cancelled** or **centre cancelled** depending on the reason and also add in any notes regarding the cancellation.



Cancellation Windows for Bookable Services

Group Fitness & Bootcamp: cancellations will close via the app **2 hours** prior to the class

FIT30 & Wellness classes: cancellations will close via the app **4 hours** prior to the class

PT, Reformer & Food Coaching: cancellations will close via the app **12 hours** prior to their session

If you have a member that calls the club and needs to cancel within this cancellation window, you can update this in the Exerp calendar. Simply follow the steps above for **Cancelling a member from an appointment or class.**

[Cancelling a member inside 12 hours and not wanting to charge the member.](#)

If you have a member that you don't want to charge for their late cancellation, make sure on the final Cancel window, select **Centre Cancelled**. This will cancel the session from the calendar and reimburse the member for their session so they don't lose a clip.

[Setting up Group Food Coaching as a bookable service](#)

Group Food Coaching is now available for clubs to set up for purchase in club and bookings via the Fernwood App.

Scheduling a Group Food Coaching session

Pro.mywellness > Planner > Class Scheduling > New > Class name: Group Food Coaching Session > Select room, date, time, instructor and schedule > Set booking to max participants.

1. In pro.mywellness > Planner > Class Scheduling > New
2. Select the class Group Food Coaching
3. Select the room – either group fitness studio or request a new room via helpdesk@fernwoodfitness.com.au
4. Enter in date, time, instructor and recurrence (do not schedule it longer than 6 months) – adjust the booking tab for max participants.
5. SAVE

Once you have the session scheduled in pro.mywellness, you also be able to view this in the FOOD COACHING calendar in Exerp for clubs to make bookings on their end.

A few things to remember:

- Member's need to purchase a clip card pack via the Front Desk to have the privilege to then book themselves in via the app or in club.
- There is a complimentary session set up
- Member's will receive a push notification reminder from the Fernwood App
- Bookings can be managed through pro.mywellness or Exerp Food Coaching Calendar.

Any requests for products/pricing adjustments please notify helpdesk@fernwoodfitness.com.au

Classes App

View class info and bookings

Exerp > Classes App > Select date/day of the week > View of all classes running that day > Select your class

From this screen you can view;

- Members that have booked into the class so far and how they booked into the class
 - Mobile API – booked via the Fernwood App
 - Staff – booked via in-club staff
- Status of their booking – Booked, No Show etc.
- Remaining spots available in the class
- Waiting list participants as well as re-run the waiting list

Tuesday, 11/02/2020, week 7

C	Time	Name	Instructor	Room	Status
	8:00 AM - 8:30 AM	Yoga (Virtual Class)	Virtual V Cycle	Yoga Room	No bookings
	9:00 AM - 9:30 AM	Yoga (Virtual Class)	Virtual V Yoga	Yoga Room	No bookings
	9:00 AM - 9:45 AM	Cycle (Virtual Class)	Virtual V Cycle	Spin Room	No bookings
	9:15 AM - 10:00 AM	Box FIT	Rachael Matumla	Group Fitness Room	Partly booked
	10:00 AM - 11:00 AM	GF Yoga (Energise)	Sue Scales	Yoga Room	Partly booked
	10:30 AM - 11:00 AM	Cycle (Virtual Class)	Virtual V Cycle	Spin Room	No bookings
	11:30 AM - 12:15 PM	Cycle (Virtual Class)	Virtual V Cycle	Spin Room	No bookings
	12:00 PM - 12:30 PM	Yoga (Virtual Class)	Virtual V Yoga	Yoga Room	No bookings
	1:00 PM - 1:30 PM	Yoga (Virtual Class)	Virtual V Yoga	Yoga Room	No bookings
	1:30 PM - 1:50 PM	Cycle (Virtual Class)	Virtual V Cycle	Spin Room	No bookings
	2:00 PM - 2:30 PM	Yoga (Virtual Class)	Virtual V Yoga	Yoga Room	No bookings

CLASS STATUS

Class openings	23	Class showups	0
Class capacity	25	Not (yet) showed up	2
Total bookings	2		

11/02/2020, Pilates

#	Name	Status	Interface	Person ID
1	Fleur Cilia (NEW)	Booked	Mobile API	301p3312
2	Clementina Tralongo (NEW)	Booked	Mobile API	301p4682

Classes Colour Codes

Purple = Virtual Group Fitness

Orange = Group Fitness Classes

Blue = FIIT30

Purple = Reformer Pilates

Adjusting head count to classes

After a class has been completed you can go back into the class via the Classes App and adjust the headcount of the class. This way your group fitness numbers can be accurate and in the system to report on.

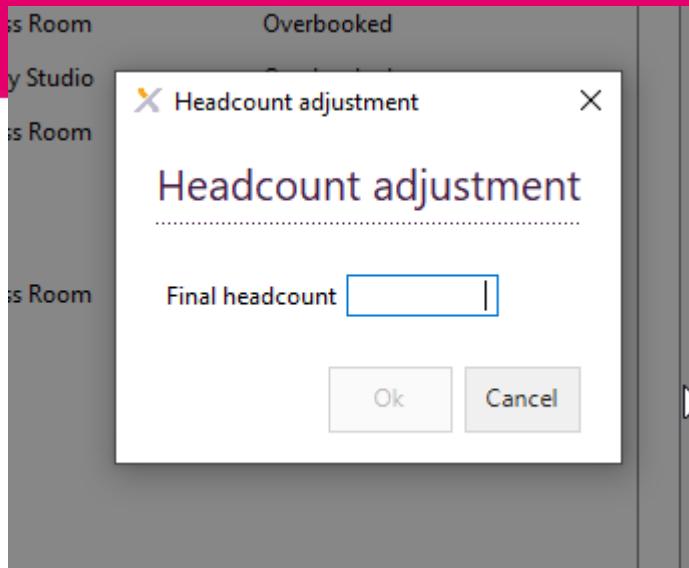
Classes App > Find & Select your class > Select Adjust Head Count > Enter in the head count of the class.

Wednesday, 5/08/2020, week 32

C	Time	Name	Instructor	Room	Status
	6:00 AM - 6:30 AM	FIIT30	Carla Williams	FIIT30	Partly booked
	6:00 AM - 6:45 AM	Cycle	Samantha McDonald	Mind & Body Studio	Overbooked
	6:45 AM - 10:15 AM	Body Pump	Michelle Impeheng	Group Fitness Room	Overbooked
	10:30 AM - 11:15 AM	Lite Pace	Lucy McDevitt	Group Fitness Room	Partly booked
	12:30 PM - 1:00 PM	FIIT30	Amelie Clyde	FIIT30	Partly booked
	3:00 PM - 5:45 PM	Step	Tyler Adams	Group Fitness Room	Overbooked
	5:45 PM - 6:15 PM	SPRINT	V Cathy	Mind & Body Studio	Overbooked
	6:00 PM - 6:30 PM	Body Pump	Tyler Adams	Group Fitness Room	Overbooked
	6:30 PM - 7:00 PM	FIIT30	Hannah Reid	FIIT30	Partly booked
	6:30 PM - 7:30 PM	GF Yoga (Calm)	Tyler Adams	Group Fitness Room	Fully booked

5/08/2020, Body Pump

#	Name	Status	Interface	Person ID
1	Rosalind Horne	Booked	Mobile API-Member	101p832
2	Marlene Kimpton	Participating	Mobile API-Member	101p635
3	Zahra Sami	Booked	Mobile API-Member	101p971
4	Nancy Nguyen	Participating	Mobile API-Member	101p1171
5	Salome Jones (NEW)	Booked	Mobile API-Member	101p648
6	Maria Grainger	Booked	Mobile API-Member	101p237
7	Jan Murphy	Booked	Mobile API-Member	101p285
8	Misako Piper	Booked	Mobile API-Member	101p1498
9	Sarah Tymkow	Booked	Mobile API-Member	101p1202
10	Rose Murillo	Participating	Mobile API-Member	101p14201
11	Leone Rowe	Participating	Mobile API-Member	101p216
12	Pim Tiesler	Booked	Mobile API-Member	101p584



Waitlist Function

When a class is full and the member cannot book a spot, it will allow them to join the waitlist for that class. We have set the waitlist capacity to 10 members.

The waitlist works like a que, when a spot in the class becomes available the next member in the que will be sent a push notification in the Fernwood App and pushed into the class. The push notification is as per below.

"Great news! You are now booked into Body Attack at 5:00pm on 20/07/20"

Finance App

Direct Debits (Billing in Exerp)

Payment Cycles

Fernwood have two payment cycles, both payment cycles are on Thursdays and debited fortnightly. When a member signs up there is the option to choose a deduction day, this can either be the Thursday (Even Week) or Thursday (Odd Week). Thursday odd week is known as 'week 1' for Fernwood, and Thursday even week is known as 'week 2' for Fernwood. (please refer to calendars on the next page: odd weeks (pink), even weeks (grey)).

All clubs will have both payment cycles as an option so that their members can choose which payment cycle they would like to be on. If you would like all of your members to be on the same payment cycle and not give the option, then this must be managed in club and all staff trained appropriately.

Please note however that if a member transfers into your club and they are paying on the opposite payment cycle to that of your other members, these members will transfer in on the payment cycle they are currently paying on and they will not be moved to your main payment cycle.

PERSONAL DETAILS

Gender Male Female

First/last name Smith

Birth date d/MM/yyyy

Age

C/O name

Address 1

Address 2

Postcode VIC

Use different invoice address

Mobile phone Allow SMS

Home phone

E-mail Allow service messages

Preferred channel

Is accepting email newsletters

Is accepting third party offers

Who will pay?

Person self (Mary Smith)

Search



Payment agreement

Create new agreement

Allow credit on cash account for Mary Smith ?

Max debit

How would Mary Smith like to pay ?

Direct Debit

Credit card

Payment cycle

Payment cycle

Individual deduction day



Bank account

Account holder

Bank registration number

Bank account number

Bank name

Bank extra info

DIRECT DEBIT CALENDAR ODD WEEK

2020

Direct Debit Date

January						
S	M	T	W	T	F	S
			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	

February						
S	M	T	W	T	F	S
						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

March						
S	M	T	W	T	F	S
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				

April						
S	M	T	W	T	F	S
					1	2
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		

May						
S	M	T	W	T	F	S
31					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

June						
S	M	T	W	T	F	S
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				

July						
S	M	T	W	T	F	S
			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	

August						
S	M	T	W	T	F	S
30	31					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

September						
S	M	T	W	T	F	S
		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			

October						
S	M	T	W	T	F	S
				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

November						
S	M	T	W	T	F	S
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					

December						
S	M	T	W	T	F	S
			1	2	3	4
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		

Direct Debit Process

Please note that all direct debits (Fernwood DD (bank account) and Fernwood CC (Pay Way) will be sent to the bank by NSO each week.

Funds will be transferred to franchisees bank accounts before 10am each Thursday and an email sent confirming the amount transferred.

Billing Process in Exerp

Exerp generates an amount to be debited to each member's payment account overnight on Tuesday evening. This amount is the amount that will be directed debited on Thursday. The account balance will reflect an amount owing as seen by the screen shot below of \$43.20 (account balance). This amount is not due yet. This is merely the amount that will be direct debited on the scheduled debit day (Thursday).

Summary	Details	Membership	Journal	Account	Booking	Relations																																																															
<table border="1"><tr><td>Account information</td><td>Payment Agreement</td><td>Payment Requests</td><td>Settlements</td><td>Gift cards</td><td colspan="2"></td></tr><tr><td><input type="radio"/> Cash account</td><td><input type="checkbox"/> Open transactions</td><td colspan="4"><input checked="" type="checkbox"/> View Details</td><td>Account balance</td></tr><tr><td><input checked="" type="radio"/> Payment account</td><td>From</td><td>29/07/19</td><td>Deduction day</td><td colspan="3">Thursday (Odd Weeks)</td></tr><tr><td></td><td>To</td><td>29/01/20</td><td></td><td colspan="3"></td></tr><tr><td colspan="7">Next deduction: 30/01/2020 - 43.20 \$</td></tr><tr><td>Entry time</td><td>Text</td><td>Due date</td><td>Deposit</td><td>Withdrawn</td><td>Open</td><td>Balance</td></tr><tr><td>29/01/2020 1:08 AM</td><td>18 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)</td><td></td><td>-43.20</td><td>-43.20</td><td>-43.20</td><td>System</td></tr><tr><td>Employee</td><td>Center</td><td>Settlements</td><td>Book date</td><td>Info</td><td></td><td></td></tr><tr><td>Sydenham</td><td>New</td><td>30/01/2020</td><td>320inv3956</td><td></td><td></td><td></td></tr></table>							Account information	Payment Agreement	Payment Requests	Settlements	Gift cards			<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details				Account balance	<input checked="" type="radio"/> Payment account	From	29/07/19	Deduction day	Thursday (Odd Weeks)				To	29/01/20					Next deduction: 30/01/2020 - 43.20 \$							Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance	29/01/2020 1:08 AM	18 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)		-43.20	-43.20	-43.20	System	Employee	Center	Settlements	Book date	Info			Sydenham	New	30/01/2020	320inv3956			
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29/01/2020 1:08 AM	18 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)		-43.20	-43.20	-43.20	System																																																															
Employee	Center	Settlements	Book date	Info																																																																	
Sydenham	New	30/01/2020	320inv3956																																																																		

Changes can still be made to members direct debits/account on a Wednesday throughout the day. If a member cancels and you do not want the debit to proceed the next day, stop the membership using todays date (Wednesday the day before the debit) and the debit for tomorrow will not proceed.

Exerp generates direct debit files for all members overnight on a Wednesday evening and prepares the debit files ready to be sent to the bank. PayWay will be sent automatically at 3am and rejections loaded as soon as the results are received by Exerp (anywhere from 3am to 5am). Bank files are sent to Westpac by NSO on Thursday morning around 9am.

Below is an example of an account that is paid by credit card. The second line (amount in red) is the amount that was generated overnight on Tuesday evening in advance of the direct debit being processed.

The first line is the direct debit being received on Thursday and this now shows the account as paid. The account balance is now showing \$00.00 in the top right-hand corner of the screen.

Summary	Details	Membership	Journal	Account	Booking	Relations
Account information						
<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details				Account balance
<input checked="" type="radio"/> Payment account	From	30/07/19	Deduction day			Thursday (Odd Weeks)
	To	30/01/20				
Next deduction: 13/02/2020 - 46.80 \$						
Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance
30/01/2020 1:04 AI	Automatic placement: 2 - 2020-01-30 (OK)		46.80	46.80	0.00	System
29/01/2020 1:00 AI	12 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)	30/01/2020		-46.80	-46.80	-46.80 System
						New
						30/01/2020
						320inv2480

It is important to note that any members who pay by bank account will continue to show an account balance for the day on Thursday and will not show the debit line coming in until Friday morning.

Summary	Details	Membership	Journal	Account	Booking	Relations
Account information						
<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details				Account balance
<input checked="" type="radio"/> Payment account	From	30/07/19	Deduction day			Thursday (Odd Weeks)
	To	30/01/20				
Next deduction: 13/02/2020 - 54.00 \$						
Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance
29/01/2020 1:07 AI	Flexi Membership: 30/01/2020 - 12/02/2020 (Auto Renewal)	30/01/2020		-54.00	-54.00	-54.00 System
						New
						30/01/2020
						320inv3740

If you would like to confirm that a debit has been generated you can view the payment requests screen.

On Friday morning once the batch jobs have run overnight the account will show an amount paid the same as members who pay by credit card.

Summary	Details	Membership	Journal	Account	Booking	Relations
Payment Requests						
Last 3 months	From	31/10/19	To	30/01/20		<input type="checkbox"/> Show Cancelled
Deduction	Type	Status	Request a...	Total incl...	Due date	Open am...
2020-01-30	Pay...	Sent		54.00	54.00 30/01/2020	54.00 Open
						westpac
						320-1359
						0.00
						0.00
						30/01/2020 01:...
						603

Rejected Payments

Rejections for members who pay by credit card will be visible on the members account information tab on Thursday morning of debit day.

If a member rejects a new line is created on their account showing a 'rejection fee' which is made up of the debit attempted and the rejection fee amount - \$46.80 + \$9.00 = \$55.80 as shown below.

Summary	Details	Membership	Journal	Account	Booking	Relations				
Account information										
<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details				Account balance -55.80 \$				
<input checked="" type="radio"/> Payment account	From 30/07/19	To 30/01/20		Deduction day Thursday (Odd Weeks)						
Next deduction: 13/02/2020 - 46.80 \$										
Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance	Employee	Settlements	Book date	Info
> 30/01/2020 2:33 PM	Rejection Fee	30/01/2020		-55.80	-9.00	-55.80	Donna Hudec	New	30/01/2020	320inv4040
30/01/2020 1:04 AM	Automatic placement: 2 - 2020-01-30 (OK)			46.80		0.00	System	Closed	30/01/2020	320-4
29/01/2020 1:00 AM	12 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)	30/01/2020		-46.80	-46.80	-46.80	System	New	30/01/2020	320inv2480

You may have noticed that the rejection fee line is shown in a grey colour, whereas the other two lines are in black. This indicates that by clicking on the arrow next to the rejection fee you can drill down further to see a breakdown of the amount. Below is a screen shot showing the debit amount and the rejection fee amount shown separately.

Summary	Details	Membership	Journal	Account	Booking	Relations				
Account information										
<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details				Account balance -55.80 \$				
<input checked="" type="radio"/> Payment account	From 30/07/19	To 30/01/20		Deduction day Thursday (Odd Weeks)						
Next deduction: 13/02/2020 - 46.80 \$										
Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance	Employee	Settlements	Book date	Info
> 30/01/2020 2:33 PM	Rejection Fee	30/01/2020		-55.80	-9.00	-55.80	Donna Hudec	New	30/01/2020	320inv4040
30/01/2020 1:04 AM	Rejection Fee	30/01/2020		-9.00	-9.00		New	30/01/2020	320inv4040	
Payment revoked manually		30/01/2020		-46.80			Closed	30/01/2020	320account_tra..	
30/01/2020 1:04 AM	Automatic placement: 2 - 2020-01-30 (OK)			46.80		0.00	System	Closed	30/01/2020	320-4
29/01/2020 1:00 AM	12 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)	30/01/2020		-46.80	-46.80	-46.80	System	New	30/01/2020	320inv2480

Rejections for members who pay by bank account will be visible in the member's account information tab on Monday morning following the debit. Until rejections are received the account is assumed as being paid.

Viewing Direct Debit Information

If you would like to view details about your direct debit and which members have been debited, this is located under Payment Requests of the finance section.

FINANCE
Transactions
Payment Requests
Payment request approval
Unplaced payments
Payment cycles
Debt collection cases

Select criteria to view the information you are looking for:

Payment Requests

PAYMENT				OTHER		PERIOD		
Scope	Ascot Vale	<input type="button" value="🔍"/>	Sent file id			Date interval	Last month	
Clearinghouse	Fernwood DD	<input type="button" value="▼"/>	Rec. file id			From	31/12/19	<input type="button" value="▼"/>
State	All	<input type="button" value="▼"/>	Amount between			To	30/01/20	<input type="button" value="▼"/>
Payment type	All	<input type="button" value="▼"/>				Use date	Creation date	<input type="button" value="▼"/>
Invoice Id.	Customer Id.	Name	State	Req. Amount	Paid amount	Open Amo...	Deduction ...	Due date
301-155	301p1041	Caitlyn Marshall	PS_SENT	160.90	0.00	160.90	30/01/2020	30/01/2020
301-8	301p56	Mary Debono	PS_SENT	8.00	0.00	8.00	30/01/2020	30/01/2020
301-596	301p4045	Hyuna Jeong	PS_SENT	40.80	0.00	40.80	30/01/2020	30/01/2020
301-10	301p62	Aileen Cox	PS_SENT	40.80	0.00	40.80	30/01/2020	30/01/2020
301-599	301p4077	Alison Licciardello	PS_SENT	40.80	0.00	40.80	30/01/2020	30/01/2020
301-600	301p4081	Mavacam FL-Ali	PS_SENT	118.80	0.00	118.80	30/01/2020	30/01/2020

PAYMENT

PAYMENT			
Scope	Ascot Vale	<input type="button" value="🔍"/>	
Clearinghouse	Fernwood DD	<input type="button" value="▼"/>	
State	All	<input type="button" value="▼"/>	
Payment type	Payment	<input type="button" value="▼"/>	

Scope: Select the club.

Clearing House: Fernwood have two clearing houses - Fernwood DD (members who pay by bank account) and Fernwood CC (members who pay by credit card).

State: The options to choose from are: All, requires approval, new, sent, open, closed, cancelled, rejected, failed. Usually you will select all or rejected. All will provide you with a full listing of all members that have been debited. Rejected will provide you with a listing of only the members who were debited and rejected.

Payment type: Select 'payment' to view which members were part of the direct debit.

OTHER

OTHER			
Sent file id	<input type="text"/>		
Rec. file id	<input type="text"/>		
Amount between	<input type="text"/>	<input type="text"/>	

Sent file id: If you know the sent file id number you can view all members debited in a particular id.

Amount between: If you would like to see which members were debited a specific amount or members between two amounts, enter the lowest figure and the highest figure in this section.

PERIOD

PERIOD

Date interval	Customized
From	16/01/20
To	16/01/20
Use date	Payment date

Date interval: Select the period of time that you would like to view member debit information. The options are today, last week, last month, last 3 months, last 6 months, the last year or a customised date period.

Date from and to: Enter the dates that you would like to view debit information

Use date: Creation date - the date that the direct debit was created (this will be the Tuesday of debit week), deduction date – the date that members were debited, payment date – the date members paid, due date – the date that the debit was due to be paid.

CUSTOMER

CUSTOMER

Invoice	<input type="text"/>
Customer	<input type="text"/> Search () () () ()

Invoice: If there is a particular members invoice that you wish to view enter the invoice number in this box.

Customer: If you wish to view a particular members previous direct debits enter the member ID in this box.

Once all criteria has been selected click on search.

Reset ()
Search ()

If you wish to reset the data and view new information, then click the reset button and enter the new selection criteria that you would like to view.

The data extracted can be exported to excel by right clicking anywhere on the data.

30	0.00	118.80	30/01/2020	30/01/2020
90		Search	30/01/2020	
20		Filter	30/01/2020	
90		Save as Excel	30/01/2020	
90		Save as Excel XLSX	30/01/2020	
90		Save as CSV	30/01/2020	
90		Count rows	30/01/2020	
90		Sum rows	30/01/2020	
50		Print	30/01/2020	
90		Copy	30/01/2020	
90	0.00	115.90	30/01/2020	30/01/2020

If you would like to view a summary of the members who rejected for the same debit, change the state in the selection criteria to rejected.

Payment Requests

PAYMENT		OTHER
Scope	Ascot Vale	Sent file id
Clearinghouse	Fernwood DD	Rec. file id
State	Rejected	Amount between
Payment type	Payment	
		Invoice Id. Customer Id. Name State Ref.

Below is a screen shot showing a member who rejected for the debit of 30/01/2020.

Payment Requests

PAYMENT		OTHER	PERIOD	CUSTOMER
Scope	Ascot Vale	Sent file id	Date interval	Invoice
Clearinghouse	Fernwood DD	Rec. file id	From	Customer
State	Rejected	Amount between	To	
Payment type	All		Use date	
Invoice Id.	Customer Id.	Name	State	Req. Amount Paid amount Open Amo... Deduction ... Due date Paid
320-152	320p686	Sarah Nich	PS_REJECT...	100.80 0.00 54.90 30/01/2020 30/01/2020

Outstanding Debt Report and Managing Outstanding Debt

If you would like to see which members still have outstanding debt and what their outstanding balances are, you can use the debt collection cases report under finance.

FINANCE
Transactions
Payment Requests
Payment request approval
Unplaced payments
Payment cycles
Debt collection cases
Debt collection steps

Debtor type: The debtor type must be set to person.

Missing entity: The missing entity should be set to overdue debt. If you would like to see which members do not have a valid payment agreement, change the missing entity to missing agreement.

From date: change the date to the date that you want to see outstanding debt from.

Scope: Select a club

Debt collection service: To see debt that has not been sent to debt collectors select not sent. To view members who have been sent to Bill Chaser then change this dropdown to Bill Chaser (this is only for clubs who have their debt managed by NSO and are sent to debt collectors by NSO).

To date: change the date to the date that you want to see outstanding debt up to.

Click search.

The screenshot shows a search form for debt collection cases. It includes fields for Debtor type (Person), Missing entity (Overdue debt), From date (27/12/19), Scope (Ascot Vale), Debt collection service (Not sent), To date (27/01/20), and a checkbox for Show closed cases. A 'Search' button is located at the bottom right.

Below is a screen shot showing how this page looks.

Debt collection cases

The screenshot shows a list of debt collection cases. The columns include Member id, Name, Status, Hold, Start date, Debt, Procedure type, Status, and Clearinghouse cred. There are three entries:

C	Member id	Name	Status	Hold	Start date	Debt	Procedure type	Status	Clearinghouse cred
	319p4280	Leah	Active	No	27/01/2020	201.0	Overdue debt	OK	1
	301p5530	Nejat.	Active	No	27/01/2020	48.9	Overdue debt	OK	1
	320p6013	Rebecca	Active	No	26/01/2020	57.0	Overdue debt	OK	2

In order to view the person, click on 'view person' at the bottom of the screen.

The screenshot shows a list of debt collection cases. The columns include Date, Amount, Status, and Ended by creditor. There are five entries. At the bottom right, there are 'View person' and 'View case' buttons.

26/01/2020	363.4	Overdue debt	Ended by creditor	1
26/01/2020	311.85	Overdue debt	OK	1
26/01/2020	53.0	Overdue debt	OK	2
26/01/2020	54.0	Overdue debt	OK	1
26/01/2020	69.0	Overdue debt	OK	2

After clicking on the 'view person' button you will be able to view the members account information, contact details etc. and add any contact notes if contact is made with the member through debt collection.

INFO

Status	Active: member for 384 days
Accumulated membership	384 days
Person type	Private
Active 'overdue debt' case	\$171.00
Binding period	Person is within binding period
Deduction day	Thursday (Odd Weeks)



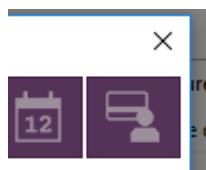
RECENT NOTES

- [26/01/2020 3:34 PM](#) 320ccol1: Cash Collection Case: Imported Cash Collection Case in step 10
[26/01/2020 3:34 PM](#) StartedDebtCollectionProcedure
[26/01/2020 3:34 PM](#) Person created: The person has been created
[View all...](#)

ID	32
External ID	24
Old system person id	FN

[Send message](#) [Create note](#) [Create to-do](#) [Create task](#) [Sales list](#)

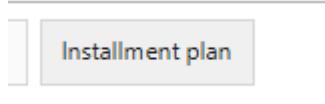
Close the person box by clicking the cross in the top right corner of the person box. If payment is made through collection processes, and the debt is cleared the member will disappear from this listing if you click the 'search' button again or view the report again at a later date.



Instalment Plans

If a member has outstanding debt that she would like to pay off over her future direct debits, the installment plans can be used.

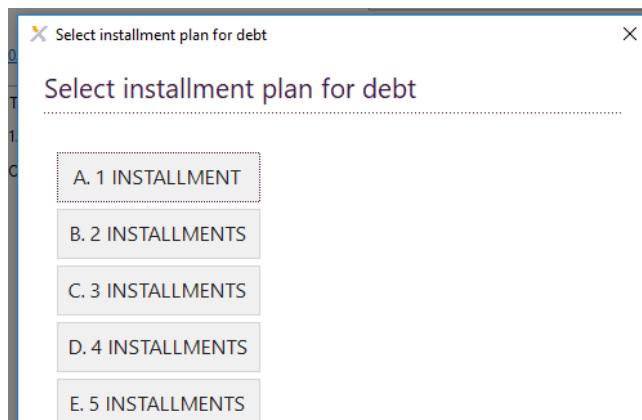
The 'installment' plan button can be found at the bottom of the account information tab.



Click on 'installment plan' and select the number of payments that the debt will be paid over.

The available options are to pay over:

- 1 installment
- 2 installments
- 3 installments
- 4 installments
- 5 installments
- 6 installments
- 8 installments
- 10 installments
- 15 installments
- 20 installments
- 25 installments
- 30 installments
- 35 installments



Click on the installment plan that will be used.

In the below example \$46.90 was outstanding and \$37.90 was not yet due. Therefore, only the outstanding amount of \$46.90 has been placed on an installment plan. The account screen has now recorded the outstanding as paid and the installment plan has been placed on the installment plan account.

Account information	Payment Agreement	Payment Requests	Settlements	Gift cards																								
<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details																										
<input checked="" type="radio"/> Payment account	From	31/07/19		Deduction day																								
<input type="radio"/> Installment plan account	To	31/01/20																										
Next deduction: 13/02/2020 - 37.90 \$																												
<table border="1"> <thead> <tr> <th>Entry time</th> <th>Text</th> <th>Due date</th> <th>Deposit</th> <th>Withdrawn</th> <th>Open</th> </tr> </thead> <tbody> <tr> <td>31/01/2020 9:51 AM</td> <td>Installment plan for debt</td> <td></td> <td></td> <td>46.90</td> <td></td> </tr> <tr> <td>29/01/2020 1:05 AM</td> <td>12 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)</td> <td>30/01/2020</td> <td></td> <td>-37.90</td> <td>-37.90</td> </tr> <tr> <td>16/01/2020 12:00 AM</td> <td>Outstanding rejected debit debt migrated from legacy system. ...</td> <td>16/01/2020</td> <td></td> <td>-46.90</td> <td></td> </tr> </tbody> </table>					Entry time	Text	Due date	Deposit	Withdrawn	Open	31/01/2020 9:51 AM	Installment plan for debt			46.90		29/01/2020 1:05 AM	12 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)	30/01/2020		-37.90	-37.90	16/01/2020 12:00 AM	Outstanding rejected debit debt migrated from legacy system. ...	16/01/2020		-46.90	
Entry time	Text	Due date	Deposit	Withdrawn	Open																							
31/01/2020 9:51 AM	Installment plan for debt			46.90																								
29/01/2020 1:05 AM	12 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)	30/01/2020		-37.90	-37.90																							
16/01/2020 12:00 AM	Outstanding rejected debit debt migrated from legacy system. ...	16/01/2020		-46.90																								

Select the installment plan account in order to view any existing installment plans.

Summary	Details	Membership				
<input type="radio"/> Cash account	<input type="checkbox"/> Account information	<input type="checkbox"/> Payment Agreement				
<input type="radio"/> Payment account						
<input checked="" type="radio"/> Installment plan account						
<table border="1"> <thead> <tr> <th>Entry time</th> <th>Text</th> </tr> </thead> <tbody> <tr> <td>> 31/01/2020 9:51 AM</td> <td>Installment plan for c</td> </tr> </tbody> </table>			Entry time	Text	> 31/01/2020 9:51 AM	Installment plan for c
Entry time	Text					
> 31/01/2020 9:51 AM	Installment plan for c					

As shown in the below example the debt of \$46.90 has been placed on an installment plan over 5 payments, by using the arrow next to the installment plan on the left you can drill down to view the amounts and dates that installments will be direct debited.

Account information	Payment Agreement	Payment Requests	Settlements	Gift cards																																										
<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details																																												
<input type="radio"/> Payment account	From	31/07/19		Deduction day																																										
<input checked="" type="radio"/> Installment plan account	To	31/01/20																																												
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Entry time	Text	Due date	Deposit	Withdrawn	Open																																									
> 31/01/2020 9:51 AM	Installment plan for debt (5/5)	9/04/2020		-46.90	-46.90																																									
	Installment plan for debt (5/5)	9/04/2020		-9.38	-9.38																																									
	Installment plan for debt (4/5)	26/03/2020		-9.38	-9.38																																									
	Installment plan for debt (3/5)	12/03/2020		-9.38	-9.38																																									
	Installment plan for debt (2/5)	27/02/2020		-9.38	-9.38																																									
	Installment plan for debt (1/5)	13/02/2020		-9.38	-9.38																																									

Cancelling a payment agreement

If a member has requested for her payment agreement to be cancelled, go to the account tab – payment agreement. Click on the payment agreement then click the cancel button at the bottom of the screen.

D..	ID	Clearinghouse	Bank account/Card number	Card token	Expiry date	Ref.
<input checked="" type="checkbox"/>	1	Fernwood CC	552033XXX766		31/08/2022	342799-0000

Entry date	Date	Status	Text	File ID	Employee ID	Name
26/01/2020 22:25	26/01/2020	OK	Data Conversion		100emp1	
26/01/2020 22:25	26/01/2020	OK	Deduction day chan...		100emp1	
26/01/2020 22:25	26/01/2020	OK	Default		100emp1	

Add
Replace
Edit
View
Use as Default
Cancel
Failed

Editing a payment agreement (switching billing cycles)

If a member would like to change her payment agreement in some way, which could include changing her debit day from the current Thursday she is paying to the opposite Thursday, or changing her details to a new bank account or credit card. This can be done in the payment agreement screen.

If the payment day is being changed then click edit.

The screenshot shows a software interface with a navigation bar at the top. The 'Account' tab is selected, highlighted in orange. Below the navigation bar, there are several tabs: 'Account information', 'Payment Agreement' (which is currently active), 'Payment Requests', 'Settlements', and 'Gift cards'. A search bar labeled 'Other payer' is followed by a 'Search' button and some icons. There are also checkboxes for 'Invoice by email' and 'Show only active agreements'.

PAYMENT AGREEMENTS

D..	ID	Clearinghouse	Bank account/Card number	Card token	Expiry date	Ref.
✓	1	Fernwood CC	552033XXX766		31/08/2022	342799-0000

LOG

Entry date	Date	Status	Text	File ID	Employee ID	Name
26/01/2020 22:25	26/01/2020	OK	Data Conversion		100emp1	
26/01/2020 22:25	26/01/2020	OK	Deduction day chan...		100emp1	
26/01/2020 22:25	26/01/2020	OK	Default		100emp1	

I PAY EFT FOR THESE PEOPLE:

At the bottom, there are buttons for 'Add' (+), 'Replace' (green circle), 'Edit' (gear), 'View' (eye), 'Use as Default', 'Cancel' (cancel), and 'Failed'.

Use the dropdown to switch from the even to the odd week and visa versa.

Credit Card agreement

Agreement

State	OK
Exerp reference	342799
Example reference	342799-0000
Expiry date	31/08/2022
Card type	

Customer

In order to complete the credit card agreement, credit card details needs to be provided. This can be done either now by choosing "open completion web page", or the customer can do it later online. In this case, please make sure that the customer has a valid email address. An email, prompting the customer to enter his details, will be sent to the address stated below.

E-mail

Payment cycle

Payment cycle Fortnightly Both Thursdays

Individual deduction day Thursday (Odd Weeks)

Payment request approval Thursday (Even Weeks)

Require approval Default

Default follows the system property "Person payment request approval". Current setting: No approval.

Automatically approve similar amounts

When amount compared to last is between % and %

In the case of the below example, the change to the payment request was done on a Wednesday after the next debits payment had already been prepared. Therefore the member will not be debited with her direct debit tomorrow (Thursday), instead the payment will remain on her account and her next payment will be \$72.00. This is the \$48.00 that was owing which covered the next fortnight + an additional \$24.00 for the one week to get to the next direct debit and align her with the new payment cycle.

Summary	Details	Membership	Journal	Account	Booking	Relations
Account information						
<input type="radio"/> Cash account	<input type="checkbox"/> Open transactions	<input checked="" type="checkbox"/> View Details				
<input checked="" type="radio"/> Payment account	From <input type="text" value="29/07/19"/>	Deduction day <input type="text" value="Thursday (Even Weeks)"/>				
To <input type="text" value="29/01/20"/>						
Next deduction: 6/02/2020 - 72.00 \$						
Entry time	Text	Due date	Deposit	Withdrawn	Open	Balance Employee
29/01/2020 1:08 AM	18 Month Ongoing: 30/01/2020 - 12/02/2020 (Auto Renewal)			-48.00	-48.00	-48.00 System

Changing a payment agreement

In order to update members banking information, click on 'replace' in the payment agreement tab at the bottom of the screen.

The screenshot shows the 'Account' tab selected in the top navigation bar. Under 'Payment Agreement', there is a table listing one agreement:

D..	ID	Clearinghouse	Bank account/Card number	Card token	Expiry date	Ref.
✓	1	Fernwood CC			31/08/2022	342799-0000

Below the table is a 'LOG' section and a 'I PAY EFT FOR THESE PEOPLE:' section. At the bottom are buttons for 'Add', 'Replace', 'Edit', 'View', 'Use as Default', 'Cancel', and 'Failed'.

Select either 'EFT' or 'credit card' and click next.

New payment agreement

Select agreement type

EFT (Fernwood DD)
 Invoice
 Credit card (Fernwood CC)

Add in the banking details and click finish.

Create EFT Agreement

Payment cycle

Payment cycle: Fortnightly Both Thursdays

Individual deduction day: Thursday (Odd Weeks)

Bank account

Account holder	SARAH SARAH
Bank registration number	062-062
Bank account number	123435
Bank name	Customer Service Centre Sydney
Bank extra info	175 Pitt Street Sydney NSW 2000

Payment request approval

Require approval: Default

Default follows the system property "Person payment request approval".
Current setting: No approval.

Automatically approve similar amounts

When amount compared to last is between 80 % and 120 %

Buttons: Previous, Finish, Cancel

When adding a credit card agreement select 'credit card (Fernwood CC)'. You will be taken to a screen that pops up for you to complete entering the credit card details. Enter the details and click save, you can now close the screen the popped up and return to Exerp.

Refunds

At first refund functionality will not be used and usual processes will still be used.

Please email your administrator with the usual information (member ID, name, payment information, amount) if you require a refund to be processed. Any refunds processed will be deducted from recouped funds transferred.

Once we start using refund functionality, we will advise clubs and provide instructions.

Price Increase Requests

If clubs would like to increase prices for any members please contact Donna Hudec at Fernwood NSO to confirm what information is required for any price increases to be applied. First please ensure that you have given your members notice of an increase by providing a minimum of 60 days' notice as per the terms and conditions.

Member Administration Services – Debt Collection

For those clubs using member administration partial service where we are doing your debt collection only, we will continue to do what we usually do and emails will still be sent as usual providing you with the details of funds transferred to your account and details relating to your direct debits.

During the pilot period our processes and the way we do things may need to change slightly to work in line with Exerp, however we will do our very best to ensure that any changes are kept to a minimum, and that we are still providing the same service that we always have.

Member Administration Services – Full-Service

For those clubs using member administration full service where we are processing paperwork on your behalf. Our processes will not change. For any requests that you have please continue to send through paperwork on a daily basis as usual.

Payment Requests

Payment requests is not currently being used. This is additional functionality that has not been available to Fernwood previously. We will advise in due course when payment requests can be used along with instructions.

Profit & Loss Reports

Clubs are required to provide NSO with their profit and loss report on a monthly basis. Clubs are given 1 month to complete their P&L in their accounting system and then email it to us on finance@fernwoodfitness.com.au. For example, January P&L must be received by 1st March.

Below is a summary of the information required which will be emailed to you in an excel template.

type_name	total amount
General Membership Income	
Personal Training Income	
FIIT30 Income	
Activation Kit Income	
Hypoxi, cell-iQ & Endermologie Income	
Food Coaching Income	
Merchandise Income	
Childcare Income	
Empower Program Income	
Wellness Income	
Rent Income	
Membership – Recouped Funds	
Membership - Refund/Rejects	
Purchases - Merchandise	
Local Social Advertising	
Ambassadors & Influencers	
Search / Google	
Email & SMS	
Casual Leasing / Displays	
Direct Mail / Letterbox Drops	
TV & Radio	
Print Media	
Other Advertising	
Bank Fees & Merchant Charges	
Management Salaries	
Bonuses & Commissions	
Food Coaching Wages	
Personal Training Wages	
FIIT30 Wages	
Group Fitness Wages	
Reception Wages	
Fitness Coach/Member Motivator Wages	
Childcare Wages	
Cleaning Wages	
Empower Coach/Wellness Wages	
Sales Wages	
cell-iQ/Hypoxi/Endermologie Wages	
Other Salaries & Wages	
Superannuation	
Payroll Tax	
Workcover Insurance	
Staff Training	
Staff Amenities	
Electricity & Gas	
Telephone/Mobile/Internet	
Occupancy Lease Rental	
Security	
Insurance	
Rates & Taxes	
Property Outgoings	
Printing Postage & Freight	
Sanitary/Laundry/Waste/Cleaning	
Les Mills Licence Fees	
Music Licence Fees	
Members Services	
Administration General	
Equipment New	
Building & Equipment Maintenance	
Airconditioning Repairs	
Office Equipment New	
Gym Equipment Leases	
Other Equipment Leases	
Franchise Royalties	
National Advertising Levy	
IT Levy	
Depreciation	
Directors Salaries	
Tax - Company	
Interest	
Profit / (Loss) - must match MYOB/XERO	0

CRM App

The CRM app is your lead management system where you will manage all of your leads in the journey up to selling a membership.

The icons down the side represent your current call lists and leads.

Glossary of terms

- Pending = all current and future tour bookings.
- On hold = your schedule of future calls, when the call gets to its scheduled day it will move into the open queue.
- Overdue = Overdue calls we didn't get to and need to prioritise – club goal is to never have any overdues.
- Unassigned = leads to be actioned and set to call by the club (web leads).
- Open = your call list for today

CRM Workflow Summary

Task	Call Attempts	
Lead	12	
Trial	Mid Trial 1 call at day 3	Post-trial 8 call attempts
Tour Not Joined	8	
Reschedule a tour	8	
Sale	Post sale referral call 1	
Renewal	No workflow scheduled, clubs to schedule own call where needed	
Member Save	No workflow scheduled, clubs to schedule own call where needed	

Lead - Contact Workflow Summary

Leads will follow the below workflow unless they move to another task (Eg - tour, trial etc)

Lead - contact 1	Day 1 AM
Lead - contact 2	Day 1 PM
Lead - contact 3	Day 2 AM
Lead - contact 4	Day 2 PM
Lead - contact 5	Day 3
Lead - contact 7	Day 6
Lead - contact 8	Week 2
Lead - contact 9	Week 3
Lead - contact 10	Week 4
Lead - contact 11	Week 5
Lead - contact 12	Week 6

- At any stage the club wished to stop the workflow they can action the lead as not interested which will close the leads workflow
- Clubs can also choose to edit the standard workflow schedule where needed via the edit button

- If the workflow is closed, a new task can simply be created for the closed lead in order to open it up again

Add a new lead

Leads coming from the webpage will go straight into unassigned, however when you have a walk in, a referral or outreach lead for example, you will need to enter a new lead.

CRM App > New Lead > Enter details of your new lead > Enter lead questionnaire information (if applicable) > Select person type > FINISH > Create task > OK.



1. Go to CRM App under Menu.
2. Click the New Lead button at the bottom of the screen.

The screenshot shows a software interface with a search bar at the top. The search bar includes fields for 'Scope' (set to 'Ascot Vale'), 'Category' (set to 'All'), 'Activity' (set to 'All'), 'Person' (search field), 'Date filter' (set to 'Last update'), 'Date interval' (set to 'Last 3 months'), 'From' (set to '24/10/19'), and 'To' (set to '23/01/20'). Below the search bar is a table with columns: Step, Title, Person, Status, Follow-up, Created date, and Last update. At the bottom of the table are buttons for 'New lead' and 'New task'. To the right of the table is a 'Bulk edit' button.

3. The create guest screen will pop up > Enter the lead's details

Create guest

Create guest

Center Ascot Vale

PERSON DETAILS

Name	Emma	Roberts
Gender	Female	
Birth date	12/12/1992	27 years
Comment		

COMMUNICATION

Home phone	+61 3 9562 1478
Mobile phone	+61 4 1985 2741
E-mail	test456@test.com.au

POSSIBLE DUPLICATES

No duplicates found

Next Cancel

Mandatory fields are:

- Name
- Gender
- Birth date
- Email
- Either Home phone or Mobile phone (it is not mandatory to give both)

4. Enter the leads preferred communication channels

→ You are able to tick and untick the customer's required communication channel(s). The goal would be to have leads opted into all communication channels, unless of course they do not want to be.

X Create guest X

Communication channels

Select available communication form

Letter

E-mail
sally.fork1234@test.com

Phone

SMS

Mobile phone +61 4 3366 6999

Select preferred communication form

No channel

E-mail

SMS

We can send you details on special offers, promotions and activities. Please choose selected services below.

Email Marketing

SMS Marketing

Phone Marketing

Previous  Next  Cancel

5. Complete the remaining person details of the lead

- It is not mandatory at this point to provide the lead's address however it is mandatory to have this at the membership sale step.

Postal information

First name: Emma

Last name: Roberts

Sex: Female

C/O name:

Address 1: Street

Address 2:

Country: Australia

Postcode:

Birth date: 12/12/1992 d/MM/yyyy

Previous Next Cancel

6. Click next and you will have the option to fill out the Lead Getting To Know You Form > Complete the answers if applicable.

Tell us all about you

Let us know how we can help you

Have you been a member of a fitness club before?

Yes

No

What are your top 3 health and fitness goals?

Weight Loss

Energy / Lifestyle

Toning / Shaping

Wellness

General Health

Other

When do you want to achieve your goals by?

ASAP

4 Weeks

3 Months

6 Months

Other

What time of day would you be planning on visiting

Early Morning

Mid Morning

Afternoon

Evening

Print

Previous Next Cancel

Create guest

Lead questionnaire

Afternoon
 Evening

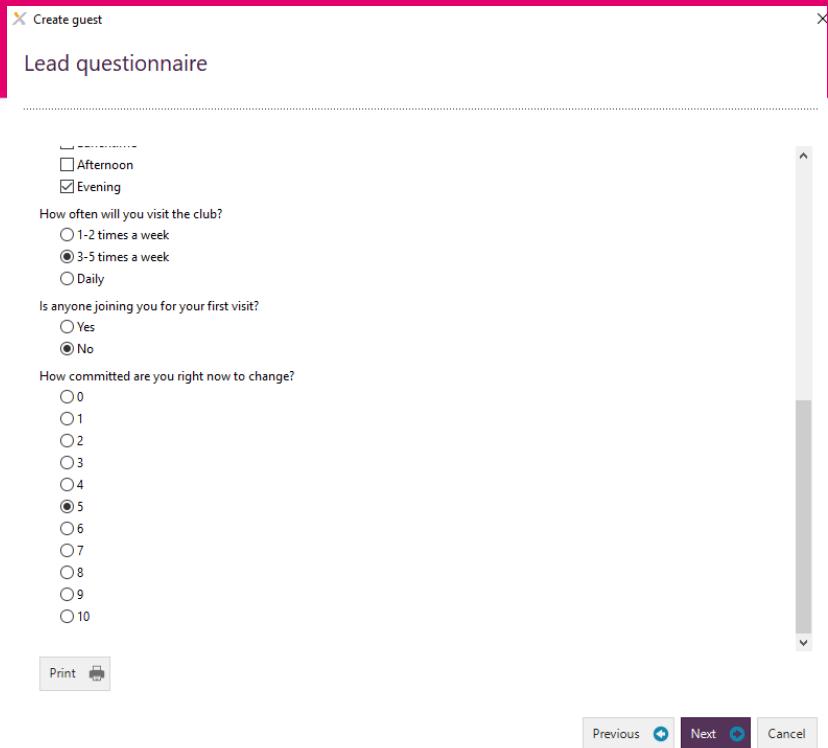
How often will you visit the club?
 1-2 times a week
 3-5 times a week
 Daily

Is anyone joining you for your first visit?
 Yes
 No

How committed are you right now to change?
 0
 1
 2
 3
 4
 5
 6
 7
 8
 9
 10

[Print](#)

[Previous](#) [Next](#) [Cancel](#)



7. Select the person type of the lead. Then click Finish.

Relation refers to the type of membership. Majority will be private, this is your standard membership. However you can use things such as Student, senior etc, in order for the standard discount or promotion for that group to apply.

Create guest

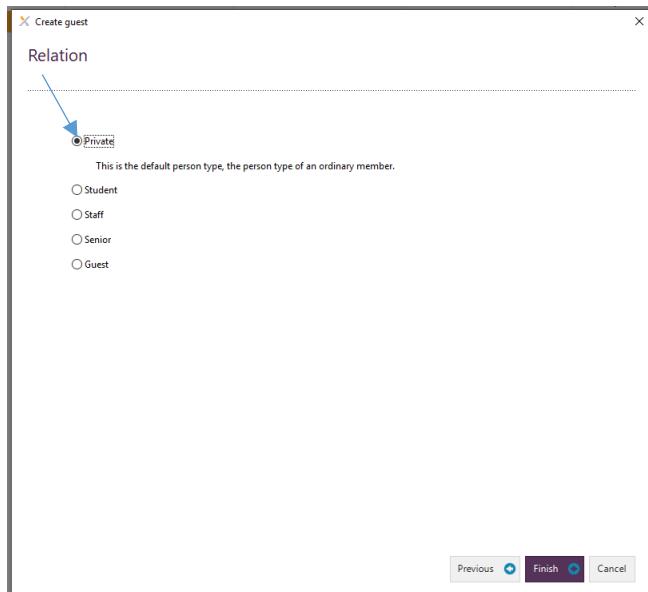
Relation

Private

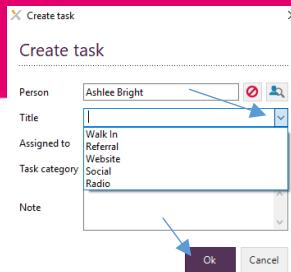
This is the default person type, the person type of an ordinary member.

Student
 Staff
 Senior
 Guest

[Previous](#) [Finish](#) [Cancel](#)



8. The Create task screen will then pop up. You will need to add the Title field by clicking on the drop down next to the Title field. Then click the Ok button. You would only need to add a new task the first time entering a lead.



One of the features of Exerp is you do not need to schedule calls once the first call or task has been made or set up. There is a backend workflow designed to make all leads fall into the next step for the club to contact and the correct time. Of course, in the event that automated set up is not what the member needs (Eg – they tell you they are away for 2 weeks) then you can go into the person and edit the call date)

9. The lead is now created in the Lead – 1st Contact step.

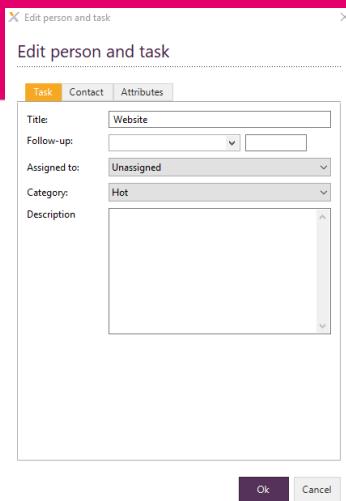
The screenshot shows the Lead Management module. On the left, there's a sidebar with filters for Scope (Ascot Vale), Category (All), and Activity (All). The main area lists leads with columns for Step, Title, Person, Status, Follow-up, Created date, and Last update. A detailed view for 'EMMA ROBERTS' is open, showing her contact information (+61 3 9562 1478 [Home], +61 4 1985 2741 [Mobile], test456@test.com.au [E-mail]). Below this, the 'LEAD - 1ST CONTACT' section shows buttons for Send Information Email, Sell, Call, and Sell Trial. The 'Comments' tab is active, showing a log of recent activities: 'Today 10:14 AM: Multiple changes (Automatic)', 'Status changed to: Unassigned', 'Task step', 'Today 10:14 AM: Took questionnaire (Automatic)', 'GTY', and 'Took questionnaire'.

How to manually add the title (lead generation source) to a lead:

1. Follow the instructions on how to add a lead.
2. Click the Edit button on the Lead – 1ST Contact screen.

The screenshot shows the 'LEAD - 1ST CONTACT' screen for 'VANESSA LEGEND'. At the top, there's a summary bar with buttons for Book Appointment, Sell Trial, Send Information Email, Call, and Sell. Below this, the lead's contact information is displayed: +61 0 4033 2111 [Mobile] and vanessa.legend@hotmail.com [E-mail]. The status is listed as ACTIVE and HOT. The 'Comments' tab is active, showing a log of activities: 'Today 10:14 AM: Multiple changes (Automatic)', 'Status changed to: Unassigned', 'Task step', 'Today 10:14 AM: Took questionnaire (Automatic)', 'GTY', and 'Took questionnaire'.

3. Type into the title field one of the following sources: Walk in, Referral, Website, Social, Radio.

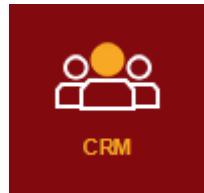


4. The Title will then show under the leads name.

Add a new task

CRM App > New Task > Search lead > Select Ok

1. Go to the CRM section in the Exerp platform.



2. Click the New Task button at the bottom of the screen.

- The Create Task screen will pop up. Type in the name of the person who you would like to create a new task for. Select the person by double clicking on them on the drop down. Select Ok.

Create task

Person	Mary James
Title	Mary James
Assigned to	N
Task category	Hot
Note	

Person ID: 301p6811
 Center: Ascot Vale
 Status: Lead
 Person type: Private
 Birth date: 12/12/1988
 Address 1: Street
 Home phone: +61 3 9877 4123
 Mobile phone: +61 4 1235 6897

Create task

Person	Mary James
Title	Website
Assigned to	Unassigned
Task category	Hot
Note	

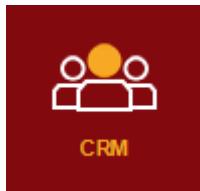
- The lead will then be re-opened in the Lead – 1st contact step.

The screenshot shows the CRM application's lead management section. At the top, there is a search bar with filters for Scope (Ascot Vale), Category (All), and Activity (All). Below the search bar is a table titled "Step" with columns: Step, Title, Person, Status, Follow-up, Created date, and Last update. The table contains two rows: "Lead - 1st Contact" (Person: Emma Roberts, Status: Lead) and "Lead - 1st Contact" (Person: Mary James, Status: Lead). Below the table is a detailed view for "MARY JAMES". It includes a profile picture, contact information (+61 3 9877 4123 [Home], +61 4 1235 6897 [Mobile], mary.jane123@hotmail.com [E-mail]), and buttons for "Send Information Email", "Sell", "Call", and "Sell Trial". On the left, there are tabs for LEAD - 1ST CONTACT, WEBSITE, Category (Hot), and Follow-up. At the bottom are "Edit" and "Comment" buttons.

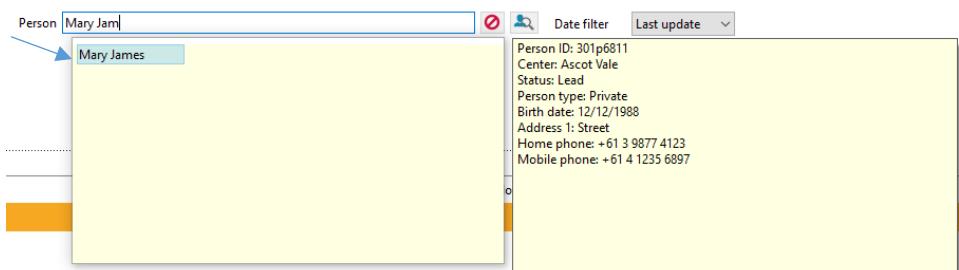
Calling a lead and setting a follow up interval

CRM App > Find your lead in the Person field > Select Call > Select Outcome > Finish

1. Go to the CRM Section of the Exerp platform.

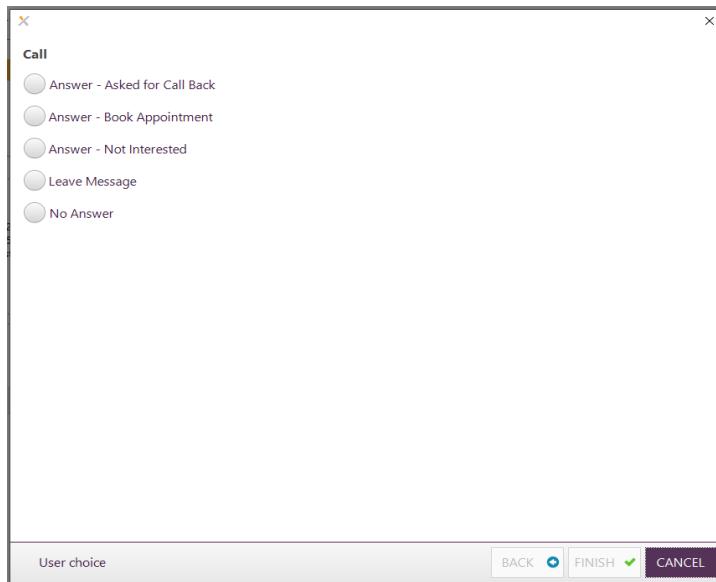


2. Choose the lead that you would like to phone by typing in the name of the lead into the Person field at the top of the page. The person's name will appear in a pop-up box underneath the Person field. Double click on the Name and the lead's details will then pop up on your screen.

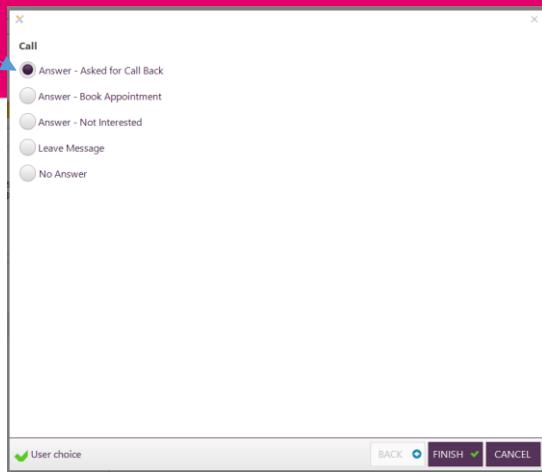


3. Click the call button.

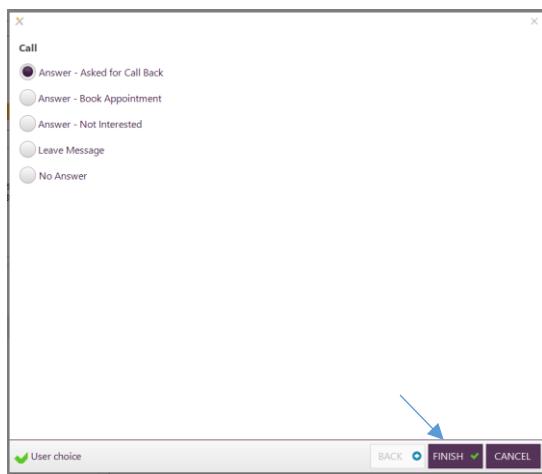
4. The Call screen will then populate with the potential user choices. As pictured below.



5. Click the tick box next to Answer – Asked for Call Back.



6. Then click Finish.



7. To schedule the call you will then click on the Edit button under the leads stage.

Step	Title	Person	Status	Assigned to	Follow-up	Created date	Last update
Reschedule Appointment 2	Website	Elisha Fink	Lead	Elisha Frenkel		6 days ago	6 days ago
Lead - 2nd Contact	Website	Mary James	Lead	Exerp Support (TK)		Today	Today

MARY JAMES

+61 3 9877 4123 [Home]
+61 4 1235 6897 [Mobile]
mary.jane123@hotmail.com [E-mail]

Sell Call Send Information Email

Comments Activity History

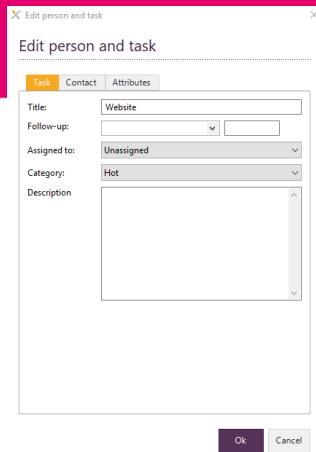
LEAD - 2ND CONTACT LEAD

WEBSITE

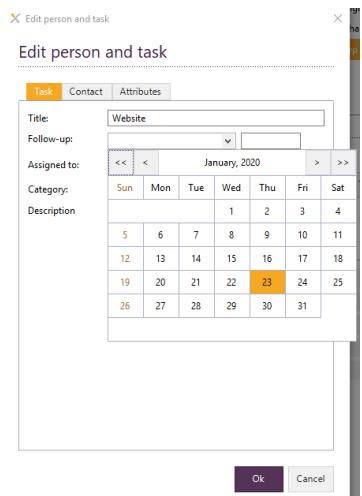
Category: Hot
Follow-up:
Assigned to: Exerp Support (TK)

Edit Comment

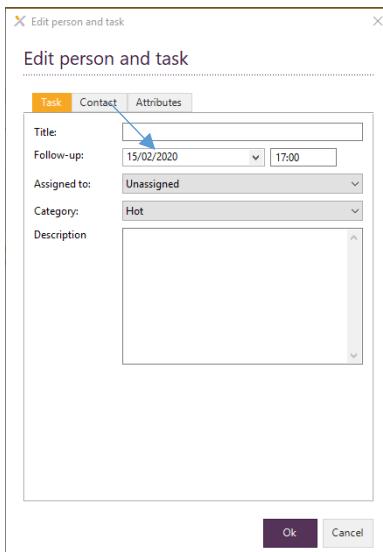
8. The edit person and task screen will then pop up.



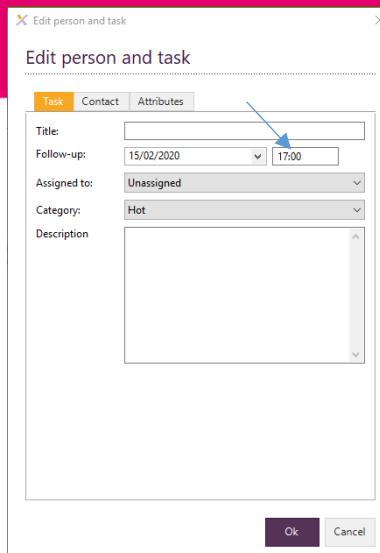
9. Click the drop-down arrow next to follow up and a calendar will appear.



10. Click on the date the you agreed to call back the lead.



11. Please enter the time that you have agreed to call the lead back in the box next to the date.
PLEASE NOTE: This will need to be in 24-hour time format i.e. 5pm would be 17:00. Then click Ok.



12. The follow up section on the lead contact will now have the follow up date as the relevant date.

Comments	Activity	History
Today 2:23 PM: Multiple changes		
Today 11:12 AM: Multiple changes		
Today 11:12 AM: Multiple changes		
Today 10:42 AM: Multiple changes		
6 days ago 2:08 PM: Participation		
6 days ago 2:02 PM: Took questionnaire (Automatic)		

Follow-up Intervals

Follow up intervals refers to the amount of time you have to follow up a lead before it falls into the overdue status of the lead management flow. As previously mentioned the system automates when to call, you would not need to adjust unless the lead has told you to call them at a specific time that is different from the automation. – Eg – the system schedules tomorrow, however the lead tells you they are away for 2 weeks.

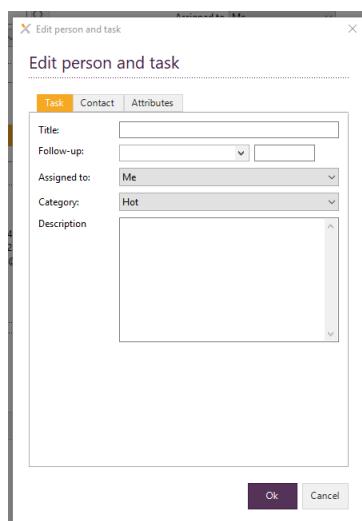
Edit a Follow-Up Interval

CRM App > Find your lead > Edit > Task screen will open > Change date/time in Follow-Up drop down

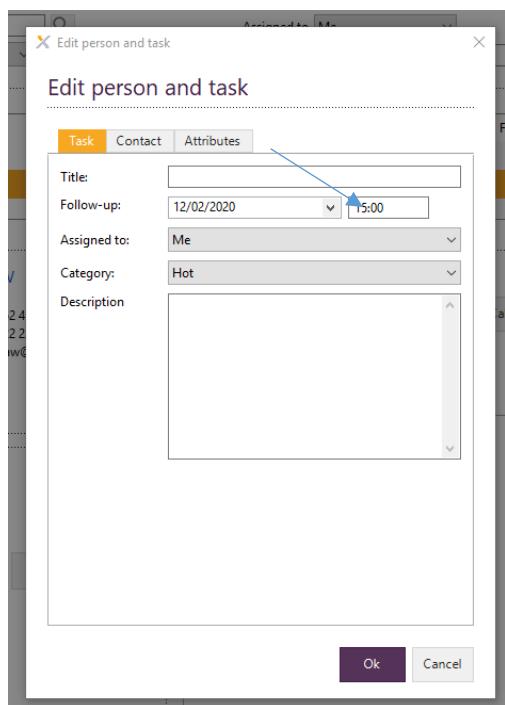
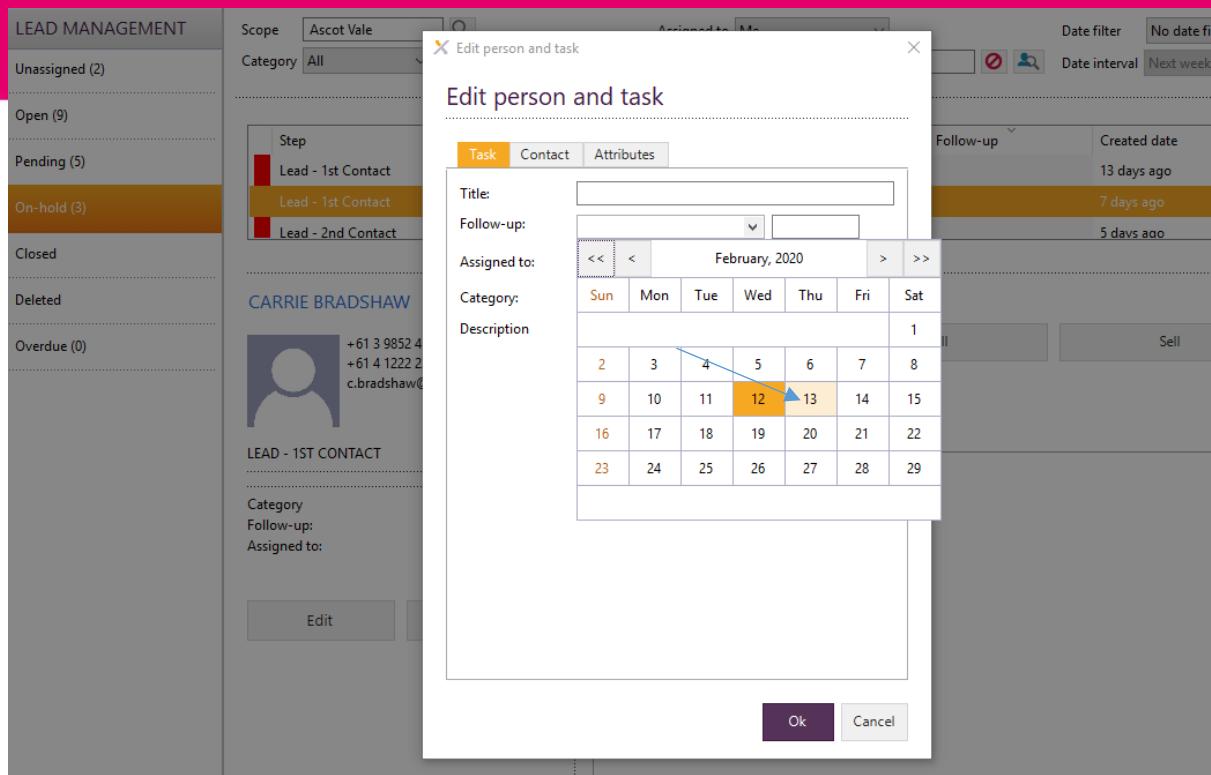
1. You are able to adjust the follow up intervals by clicking on the relevant lead and then clicking on the Edit button.

The screenshot shows the Lead Management screen. On the left, a sidebar lists categories: Unassigned (2), Open (9), Pending (5), **On-hold (3)**, Closed, Deleted, and Overdue (0). The main area displays a table of leads with columns: Step, Title, Person, Status, Follow-up, Created date, and Last update. Three leads are listed: "Lead - 1st Contact" (Person: Jess Kwas, Status: Lead, Follow-up: 13 days ago, Created: 13 days ago); "Lead - 1st Contact" (Person: Carrie Bradshaw, Status: Lead, Follow-up: 7 days ago, Created: 7 days ago); and "Lead - 2nd Contact" (Person: Jessica Alba, Status: Lead, Follow-up: 5 days ago, Created: 5 days ago). A detailed view for "Carrie Bradshaw" is open, showing her contact information (+61 3 9852 4555 [Home], +61 4 1222 2222 [Mobile], c.bradshaw@test.com [E-mail]). Below this are tabs for Comments, Activity, and History. At the bottom of the lead card are buttons for Edit, Comment, and a plus sign. To the right of the lead card are buttons for Send Information Email, Call, and Sell.

2. The Edit person and task screen will then pop up.



3. Add in the date to the Follow-up drop down. Add the time in 24-hour format to the box next to the date. Then click Ok.



Sell a membership

CRM App > Find your lead > Lead will come up > Select Sell > Complete the sale via the Membership Sale App

1. Bring up the lead that you are going to sell a member subscription to by typing in the name of the lead into the Person field. As you type in the name a pop up with the lead will appear below and you will need to double click on the correct name.

2. This will bring up the details of the lead.

3. To Sell to the lead please click on the Sell button

4. This will take you to the Member Sale section of the platform where you can sell a membership subscription. Please refer to instructions for Processing a membership subscription sale.

7-day Post Sale Call

Once the membership is sold it will transition to "Post Sign Up Call" with a follow update 7 days in the future, the name of the action (button) is "Post Sale Call. This will sit in the on hold calls for the membership consultant to do at the given time. The idea of this call is to ensure the member has settled in nicely to the club, has began their induction and is a great opportunity to remind about the member privileges referral passes.

The screenshot shows the Lead Management screen. On the left, there are filters for Scope (Miranda), Category (All), and Activity (All). The main area displays a table of activities:

Step	Title	Person	Status	Assigned to	Follow-up	Created date	Last update
Post Sign Up Call	Jessica Rabbit	Active	Membership Consultant 1	2/03/2020	3 days ago	Today	Today
Lead - 2nd Contact	Di Williams	Active	Ewerp Support (TK)	25/02/2020	4 days ago	Today	Today
Lead - 2nd Contact	Sister Kemp 2	Active	Membership Consultant 1	25/02/2020	4 days ago	Today	Today
Lead - 3rd Contact	Donna Lee	Active	Ewerp Support (TK)	25/02/2020	3 days ago	Today	Today

A red circle highlights the "Post Sign Up Call" step for Jessica Rabbit. Another red circle highlights the "Follow-up" column for the first row.

On the right, a modal window titled "Post Sale Call" lists options: Answer - Asked for Call Back, Answered - Post Sale Call, Leave Message, and No Answer. The "Answered - Post Sale Call" option is selected.

Process a Trial

CRM App > Search for your lead in the person field > Select Sell a Trial > Complete the process through the Membership Sale App.

1. Bring up the lead by typing in the name of the lead into the Person field. As you type in the name a pop up will appear below and you will need to double click on the correct name.

The screenshot shows a search results page for "jane johnson". A yellow box highlights the search input field containing "jane johnson". Below it, a list of results shows "Jane Johnson" and "Janet Johnson". A detailed lead card for "Jane Johnson" is displayed on the right, listing personal information like Person ID, Center, Status, and Birth date.

2. This will bring up the details of the lead.

The screenshot shows the lead details page for "Jane Johnson". The lead card includes contact information (+61 3 9852 4188 [Home], +61 4 1785 4236 [Mobile], jjohnson12@test.com [E-mail]), social links, and activity buttons (Sell Trial, Send Information Email, Call, Book Appointment, Sell). The "Comments" tab is active, showing recent changes: "Today 3:16 PM: Multiple changes" and "Today 3:16 PM: Took questionnaire (Automatic)".

3. To sell a Trial subscription to the lead please click on the Sell Trial button

The screenshot shows the Exerp CRM interface. At the top, there are filters for Scope (Ascot Vale), Category (All), and Activity (All). The assigned person is 'Me' (Princess Diana) with a date filter of 'No date filter' and a date interval of 'Last month'. Below the filters is a table of leads:

Step	Title	Person	Status	Follow-up	Created date	Last update
Lead - 3rd Contact	Website	Mary James	Lead	24/01/2020	Yesterday	Yesterday
Lead - 2nd Contact	Social	Jane Johnson	Lead	24/01/2020	Yesterday	Yesterday
Reschedule Appointment	Social	Ashley Sampson	Lead		2 days ago	2 days ago

Below the table is a detailed view of Jane Johnson's lead profile. It includes her contact information (+61 3 9852 4189 [Home], +61 4 1785 4236 [Mobile], jjohnson12@test.com [E-mail]), lead status (LEAD - 2ND CONTACT, LEAD), social category (SOCIAL, Hot), follow-up date (24/01/2020), and assigned to (Elisha Frenkel). There are buttons for 'Sell Trial', 'Call', 'Send Information Email', 'Sell', 'Edit', and 'Comment'.

4. This will take you to the Member Sale section of the platform where you can sell a Trial subscription. Please refer to instructions for Processing a membership subscription sale however please use the TRIALS product.

The screenshot shows the Member Sale interface. At the top, it says 'Jane Johnson' and has an 'Add +' button. Below that is a 'SELECT PRODUCT' section with 'Jane Johnson (Lead) - Private'. There are tabs for 'PRIVATE', 'PERSON PROFILE', 'ENTER CAMPAIGN CODE', and 'RECURRING CLIPCARDS'. A blue arrow points from the previous screenshot to the 'TRIALS' tab, which is highlighted in orange.

End a Trial

1. Follow the instructions for Sell Trial subscription.
2. Go to the CRM section of the Exerp platform.
3. Bring up the lead by typing in the name of the lead into the Person field. As you type in the name a pop up with the lead will appear below and you will need to double click on the correct name.

The screenshot shows the CRM interface. In the top left, there is a search bar for 'Person' with 'Sarah Dick' typed in. A detailed info box appears over the lead profile, containing the following information:

- Person ID: 301707035
- Center: Ascot Vale
- Status: Active
- Person type: Private
- Birth date: 2/12/1992
- Address 1: Street
- City: 3183 ST KILDA EAST
- Home phone: +61 3 9854 7896
- Mobile phone: +61 4 7896 3123

4. This will bring up the details of the lead.

The screenshot shows the CRM interface. At the top, there are filters for Scope (POST TRIAL CALL 1), Category (ACTIVE), and Activity (Cold). The assigned person is 'Me' (Sarah Dickens) with a date filter of 'No date filter' and a date interval of 'Next week'. Below the filters is a table of leads:

Step	Title	Person	Status	Follow-up	Created date	Last update
POST TRIAL CALL 1	ACTIVE	Sarah Dickens	Cold			

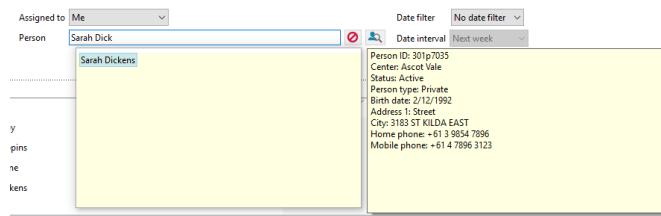
Below the table is a detailed view of Sarah Dickens' lead profile. It includes her contact information (+61 3 9854 7896 [Home], +61 4 7896 3123 [Mobile], sarah.dickens123@test.com [E-mail]), lead status (POST TRIAL CALL 1, ACTIVE), category (Cold), and assigned to (Elisha Frenkel). There are buttons for 'Call', 'Sell', 'Edit', and 'Comment'.

5. As the leads trial has now finished, the system will automatically transition the lead from the Trial step to Post Trial Contact 1.

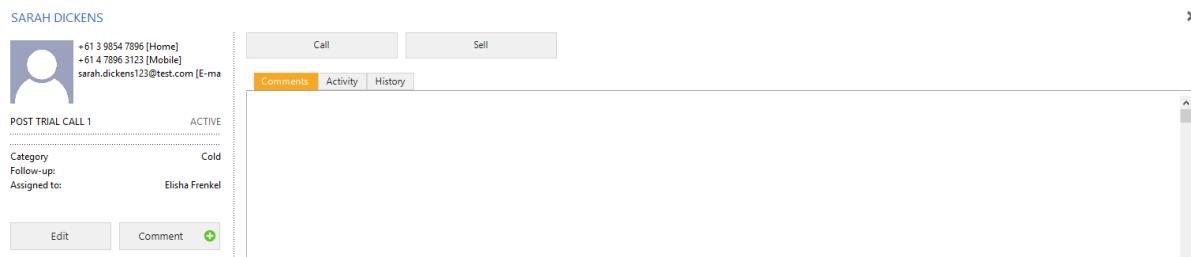
- An SMS will be sent one day before the trial ends. The copy is below:
Hi @@owner/firstName@@ - your Fernwood trial ends tomorrow. Keep those feel-good endorphins flowing - become a member today!

Post-Trial Call

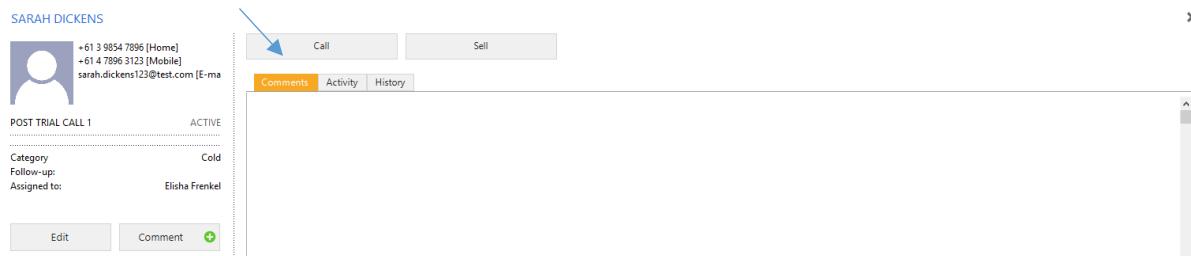
- Follow the instructions for Sell Trial subscription.
- Go to the CRM section of the Exerp platform.
- Bring up the lead by typing in the name of the lead into the Person field. As you type in the name a pop up with the lead will appear below and you will need to double click on the correct name.



- This will bring up the details of the lead. As the lead's trial has now finished, the system will automatically transition the lead from Trial to Post Trial Contact 1.



- Click the Call button.



- If the lead does not answer then click on the radio button next to No Answer in the Call screen which will pop up. Then click the FINISH button.



7. The lead will then transition to the Post Trial Contact 2 stage of the flow.

No Sale

The lead is not interested in purchasing a trial or member subscription.

1. Add in a new lead using the instructions for add a new lead.
2. Click on the Call button.

3. The Call screen will pop up. Click the button next to Answer – Not Interested. Then click the FINISH button.



4. The lead will then transition to Closed and be sitting at the No Sale stage of the flow.

SALLY MAN

NO SALE LEAD

Category: Follow-up: Assigned to: Elisha Frenkel

+61 3 9523 6547 [Home]
+61 4 1258 7963 [Mobile]
sallyman@test.com [E-mail]

Comments Activity History

Edit Comment +

Adding your Sales Availability

1. Go to the planning section of the Exerp platform.



2. Click on the SALES banner and highlight Sales Availability underneath it.

Sales Availability

SUN 16 FEB 2020

Resource Staff Day Week Month

12:00 PM 1:00 PM 2:00 PM 3:00 PM 4:00 PM 5:00 PM 6:00 PM 7:00 PM 8:00 PM 9:00 PM 10:00 PM 11:00 PM

Caitlin Jury Elisha Frenkel Everp Support (TK) Mandy Johnson Mark Hanna Tahlia Day

6:15 PM CP
Mark Hanna
Sales Staff Availability
Mark Hanna

Create booking Export View as PDF Activate bookings Change recurrences Substitute staff Replace staff Show Summary

3. Click the Create booking button.

Sales Availability

SUN 16 FEB 2020

Resource Staff Day Week Month

12:00 PM 1:00 PM 2:00 PM 3:00 PM 4:00 PM 5:00 PM 6:00 PM 7:00 PM 8:00 PM 9:00 PM 10:00 PM 11:00 PM

Caitlin Jury Elisha Frenkel Everp Support (TK) Mandy Johnson Mark Hanna Tahlia Day

6:15 PM CP
Mark Hanna
Sales Staff Availability
Mark Hanna

Create booking Export View as PDF Activate bookings Change recurrences Substitute staff Replace staff Show Summary

4. The Select activity screen will populate. Click Next.

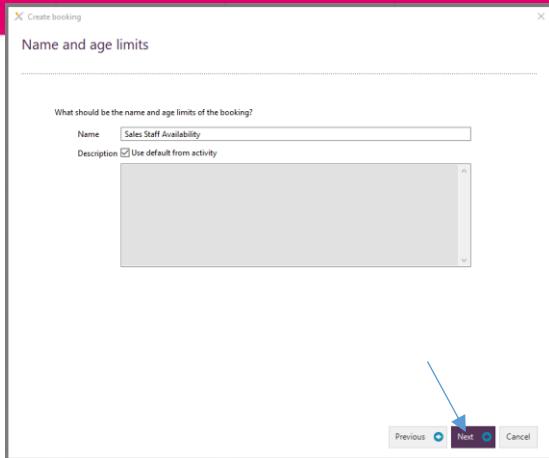
Select activity

Which activity should the booking have?

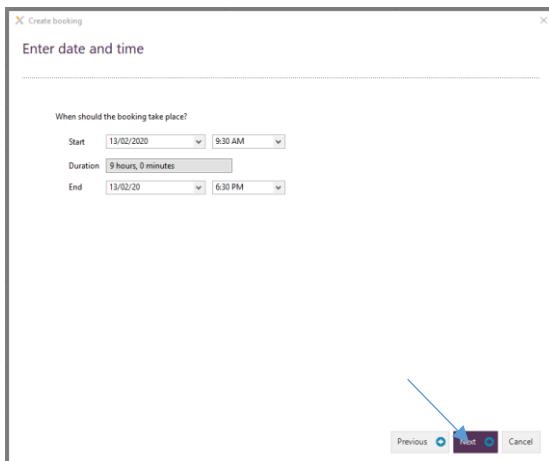
Center Ascot Vale Activity

Next Cancel

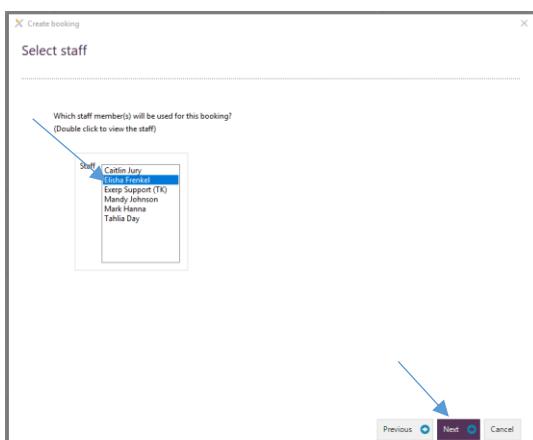
5. The Name and age limits screen will populate. Click Next.



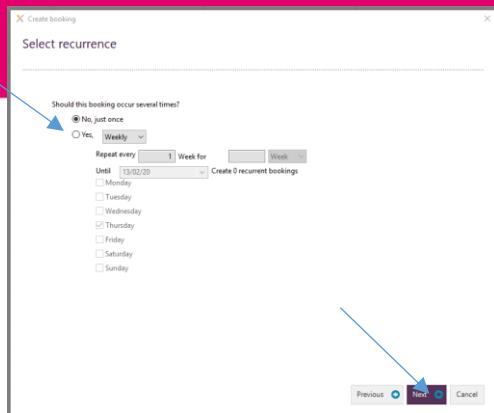
6. The Enter date and time screen will populate. Add in your relevant availability. Then click Next.



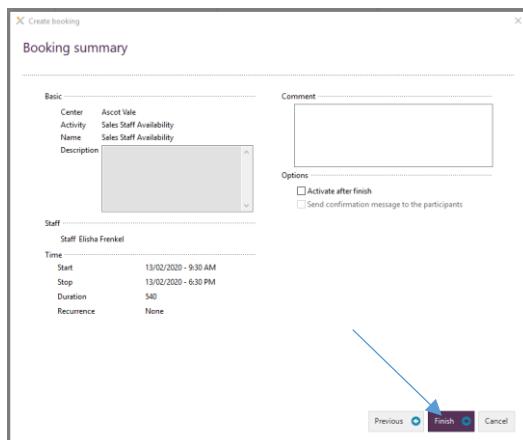
7. The Select staff screen will then populate. Choose the appropriate staff member that the sales booking is with. Then click Next.



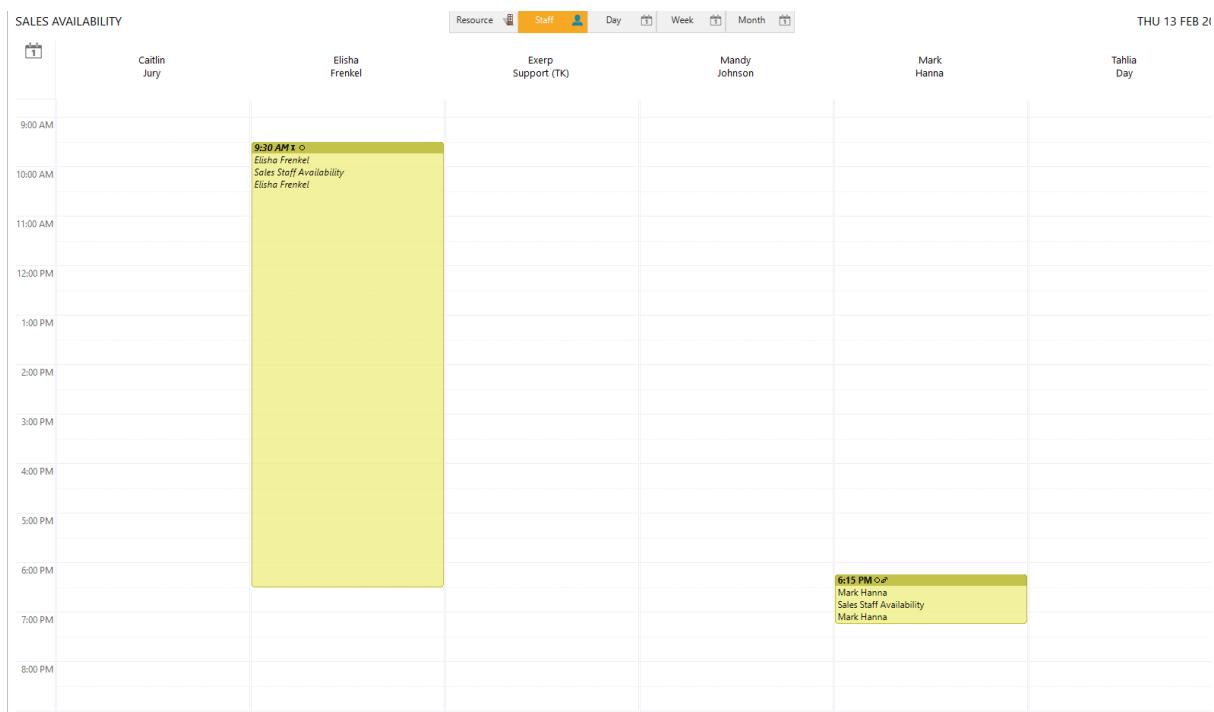
8. The Select recurrence screen will then populate. If you would like to set this availability as a daily/weekly/monthly occurrence you can do this here. Alternatively, this can be a once off occurrence. Then click Next.



9. The Booking Summary screen will then populate. Click Finish.

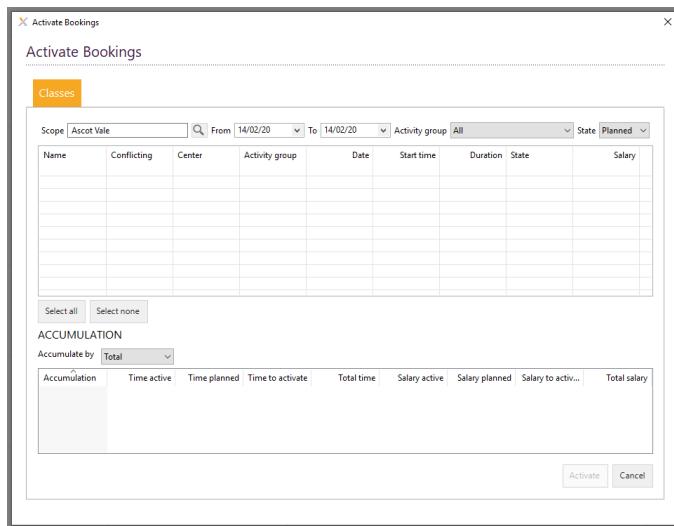


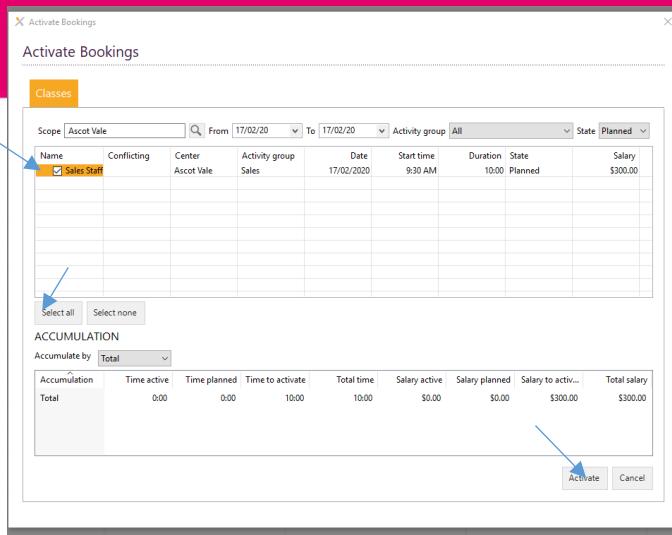
10. You will then be able to see your availability is blocked out.



11. You will then need to activate your bookings in order to be able to actively book appointments during this block of time.

12. The Activate Bookings screen will then populate. You will need to click the sales availability period that you would like to activate or you can activate all your bookings if necessary. Click Activate. When activating bookings ensure to move the “To Date” field to the relevant date in the future so you can activate all availability into the future (if you created multiple recurrences).





Book a Sales Appointment (Tour)

- Before booking in a sales appointment please ensure that you have the required availability to book the appointment. You will need to use the planning section of the platform to add in your relevant sales availability. Please refer to adding your sales availability instructions.
1. Follow the previous instructions to add a new lead.
 2. The lead will be sitting at the LEAD – 1st contact stage.

3. Click the Call button

4. The Call screen will then pop up with the user choices. Click the radio button next to Answer – Book Appointment.



5. The Calendar will open where you can book in your Sales Appointment.

The screenshot shows a software interface for booking sales appointments. On the left, a sidebar lists categories like 'SEARCHES' (with 'Sales Apps' selected), 'ROOMS', 'PERSONS', and 'SALES'. The main area is a calendar titled 'SALES APPTS' for the week of January 20-26, 2020. The calendar grid shows time slots from 9:00 AM to 9:00 PM. A large yellow rectangular block highlights the entire day of Friday, January 24, starting at 10:01 AM. At the bottom of the sidebar, there are buttons for 'Create booking', 'Export', 'View as PDF', and 'Substitute staff'.

6. To add a sales appointment to the calendar please click on the PERSONS section and click on the name of the person that you are booking the sales appointment for.

PRINCESS DIANA

20 JAN - 26 JAN, 2020

Searches: SALES, ROOMS, PERSONS

Elsha Frekal, Princess Diana

Booking details: 10:10 AM - 10:30 AM on Saturday, Jan 25, 2020.

- Double click on the time you would like to book the sales appointment for and the Select activity screen will pop up.

Select activity

No activity has been selected

Which activity should the booking have?

Center: Ascot Vale

Activity: All

- All
- Fitness Coaching
- Mywellness Cloud
- Sales
- Cell IQ
- Child Care

Cell IQ
Cell IQ Bed
Child Care Staff
Fitness Coach
Food Coaching 15 Mins
Food Coaching 30 Mins
Master Personal Training Session
Personal Training
Sales Appointment

Next > Cancel

- Under Activity click on the sales button.

Select activity

Which activity should the booking have?

Center: Ascot Vale

Activity: Sales

- All
- Fitness Coaching
- Mywellness Cloud
- Sales
- Cell IQ
- Child Care

Sales Appointment

Next > Cancel

9. Click to highlight the option for Sales Appointment in the box to the right of Activity. Then click the Next button.

Which activity should the booking have?

Center Ascot Vale

Activity

- All
- Fitness Coaching
- Mywellness Cloud
- Sales
- Cell IQ
- Child Care

Sales Appointment

Next Cancel

10. Enter the date and time of the sales appointment required. You are able to change the duration of the appointment using the drop down next to the duration field. Then click the Next button.

Enter date and time

When should the booking take place?

Start 24/01/20 11:30 AM

Duration 15

End 24/01/20 11:45 AM

Previous Next Cancel

Enter date and time

When should the booking take place?

Start 24/01/20 11:30 AM

Duration 15

30
45
60

AM

Previous Next Cancel

11. Choose the relevant staff member. Then click the Next button.



Which staff member(s) will be used for this booking?
(Double click to view the staff)

Staff
Elisha Frenkel Excep Support (TK) Mark Hanna

Previous Next Cancel

12. The next page is the Booking Summary. Click the Finish button on this screen.

 Create booking >

Booking summary

Basic

Center	Ascot Vale
Activity	Sales Appointment
Name	Sales Appointment
Description	[Large text area]

Participants

- Customer Princess Diana

Staff

- Staff Elisha Frenkel

Time

Start	24/01/2020 - 11:30 AM
Stop	24/01/2020 - 11:45 AM
Duration	15
Recurrence	None

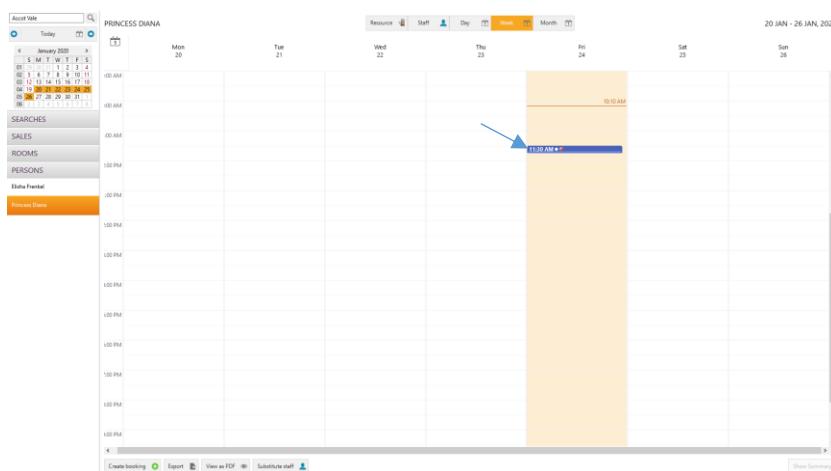
Comment [Large text area]

Options

- Activate after finish
- Send confirmation message to the participants

Previous **Finish** Cancel

13. You will now see the appointment appear at the relevant timeslot in the calendar. The red dot next to the sales appointment indicates that the lead has not yet toured and once the lead been shown up for their tour then the dot will turn green.



14. The lead will be sitting at the Lead – 1st contact stage of the lead management flow.

The screenshot shows a software interface for managing leads. On the left, there's a profile picture placeholder for 'STACEY PICKLE'. Below it, the lead's contact information is listed: +61 3 9622 6999 [Home], +61 4 7788 8999 [Mobile], and stace.pickle12@test.com [E-mail]. The lead is categorized as 'SOCIAL' and has a 'Category' of 'Hot'. The 'Follow-up:' field is empty, and 'Assigned to:' is set to 'Elisha Frenkel'. On the right, there are four action buttons: 'Sell', 'Sell Trial', 'Send Information Email', and 'Call'. Below these buttons is a tab navigation bar with 'Comments' (which is selected and highlighted in orange), 'Activity', and 'History'. At the bottom of the screen are 'Edit', 'Comment', and a '+' button.

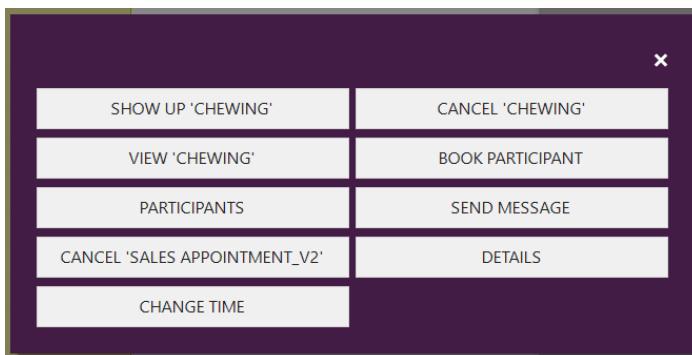
15. Once the appointment has been booked in the customer will be sitting under the open status and will be sitting at the Tour Booked stage.

The screenshot shows a software interface for managing bookings. On the left, there's a profile picture placeholder for 'JESS FAST'. Below it, the booking details are listed: +61 3 9555 2222 [Home], +61 4 9955 5222 [Mobile], and jess.fast@test.com [E-mail]. The booking is in the 'TOUR BOOKED' stage and is categorized as 'WEBSITE'. The 'Category' is 'Hot', and the 'Follow-up:' field contains the date '11/02/2020'. 'Assigned to:' is set to 'Elisha Frenkel'. On the right, there is a single action button 'Show Up'. Below it is a tab navigation bar with 'Comments' (selected), 'Activity', and 'History'. At the bottom of the screen are 'Edit', 'Comment', and a '+' button.

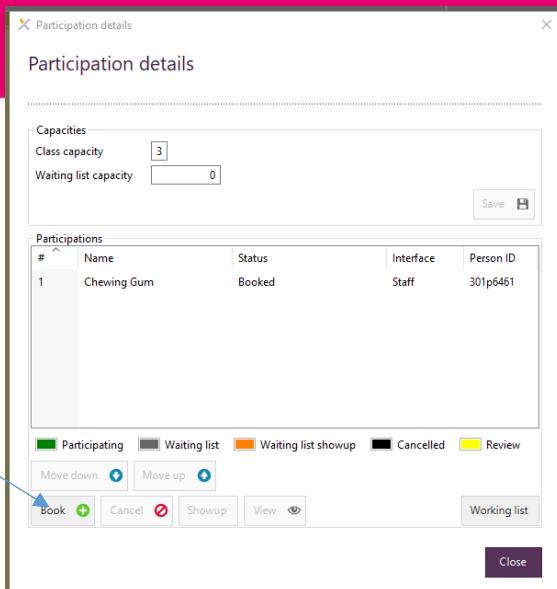
16. You can add more than one member to the booking as well, if you wanted to do a tour with 2 friends or a mother and daughter together -this is set up to allow up to 3 people at a time against one booking.

17. If you would like to add additional lead to the booking then you can do this by going to the calendar app. The click on the SALES heading and then on Sales Appointments.

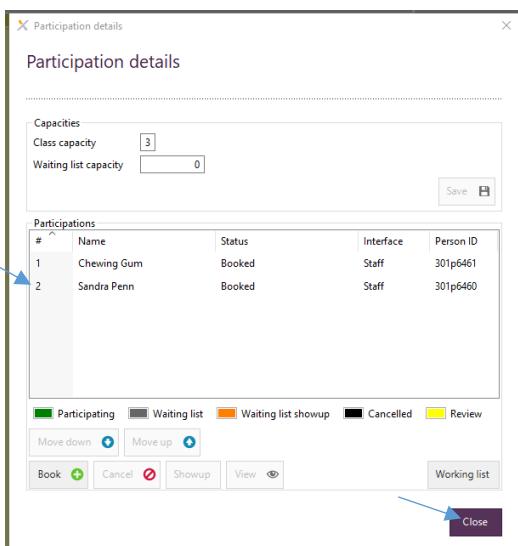
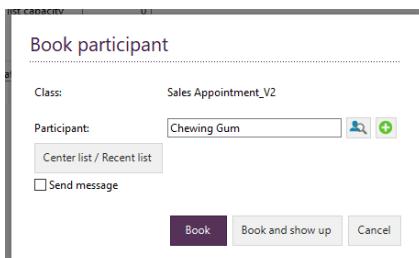
18. Double click on the sales appointment that you would like to add participants to. The below screen will then populate.



19. Click on participants. The Participation details screen will populate. Click Book + button.



20. Book in the relevant participant(s) in the Book participant screen. Then click Close.



Showing up a customer for a sales appointment

1. You will need to move to the Calendar application in Exerp.



2. Click on 'Sales Appointments' on the left-hand side under SALES.

SALES APPOINTMENTS

10 FEB - 16 FEB, 2020

MON 10 TUE 11 WED 12 THU 13 FRI 14 SAT 15 SUN 16

2:00 PM 3:00 PM 4:00 PM 5:00 PM 6:00 PM 7:00 PM 8:00 PM 9:00 PM

Sales Appointments

2:30 PM 3:15 PM

Ascot Vale Today

Resource Staff Day Week Month

Create booking Export View as PDF Substitute staff

Show Summary

Front Desk Classes Personal Training Sales Person Membership Sale CRM Rooms Persons

SEARCHES CLASSES PERSONAL TRAINING SALES Sales Appointments

February 2020 S M T W T F S 05 26 27 28 29 30 31 1 06 2 3 4 5 6 7 8 07 9 10 11 12 13 14 15 08 16 17 18 19 20 21 22 09 23 24 25 26 27 28 29 10 1 2 3 4 5 6 7 8

- Double click on the relevant sales appointment.

SALES APPOINTMENTS

10 FEB - 16 FEB, 2020

MON 10 TUE 11 WED 12 THU 13 FRI 14 SAT 15 SUN 16

2:00 PM 3:00 PM 4:00 PM 5:00 PM 6:00 PM 7:00 PM 8:00 PM 9:00 PM

Sales Appointments

2:30 PM 3:15 PM

Ascot Vale Today

Resource Staff Day Week Month

Create booking Export View as PDF Substitute staff

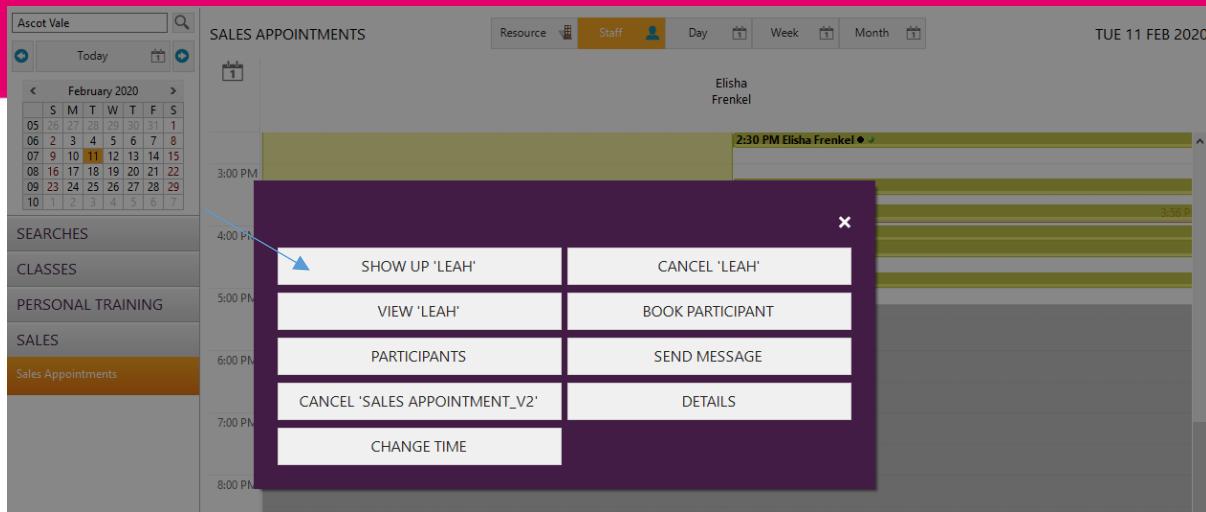
Show Summary

Front Desk Classes Personal Training Sales Person Membership Sale CRM Rooms Persons

SEARCHES CLASSES PERSONAL TRAINING SALES Sales Appointments

February 2020 S M T W T F S 05 26 27 28 29 30 31 1 06 2 3 4 5 6 7 8 07 9 10 11 12 13 14 15 08 16 17 18 19 20 21 22 09 23 24 25 26 27 28 29 10 1 2 3 4 5 6 7 8

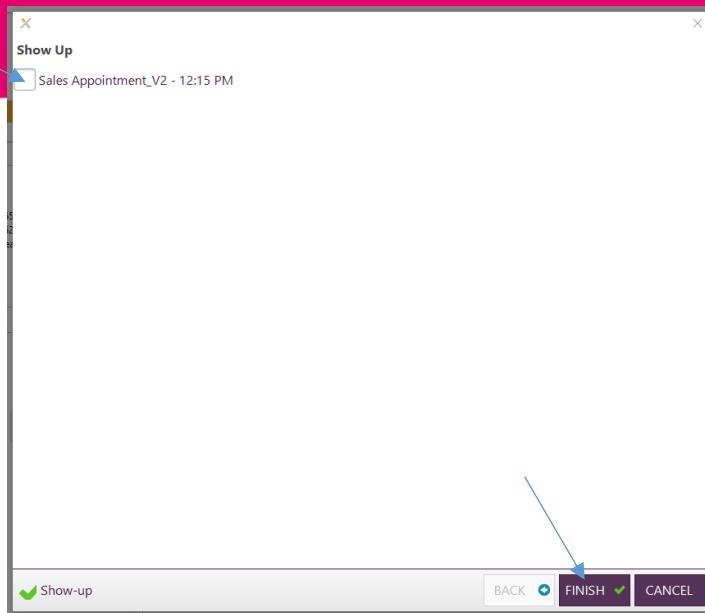
- A screen will show up with a number of options. You will then click the SHOW UP 'CUSTOMER' button to show up the customer to their appointment.



- The customer will then be sitting in the open status and have moved to the Tour Complete stage.

- Alternatively, you could stay in the CRM app and show them up here.
- Instead of moving to the calendar app you would just click on the 'Show Up' button on the lead who is sitting at the Tour Booked step.

- The Show Up screen will be populated. Click on the time of the relevant Sales Appointment. Then click FINISH.



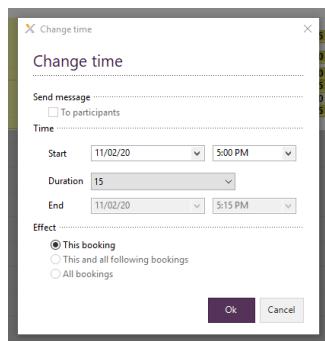
9. The lead will then also be taken to the next step which is Tour Completed.

A screenshot of a software interface showing a lead record for "PEACH CREAM". The lead's contact information includes phone numbers and an email address. The status is listed as "TOUR COMPLETED". The lead is assigned to "Elisha Frenkel" and has a follow-up date of "15/02/2020". At the bottom, there are buttons for "Edit", "Comment", and a green "Comment" icon. The "Comments" tab is highlighted in orange, while "Activity" and "History" are in grey. There are also buttons for "Send Information Email", "No Sale", and "Sell Trial".

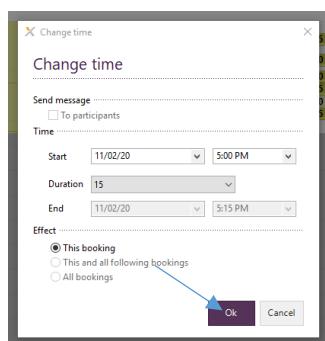
Reschedule an appointment

1. In the Calendar section of the platform you will update the appointment if the lead is unable to make the original appointment time. You will need to go to the Calendar section and click on SALES and then on 'Sales Appointments'.

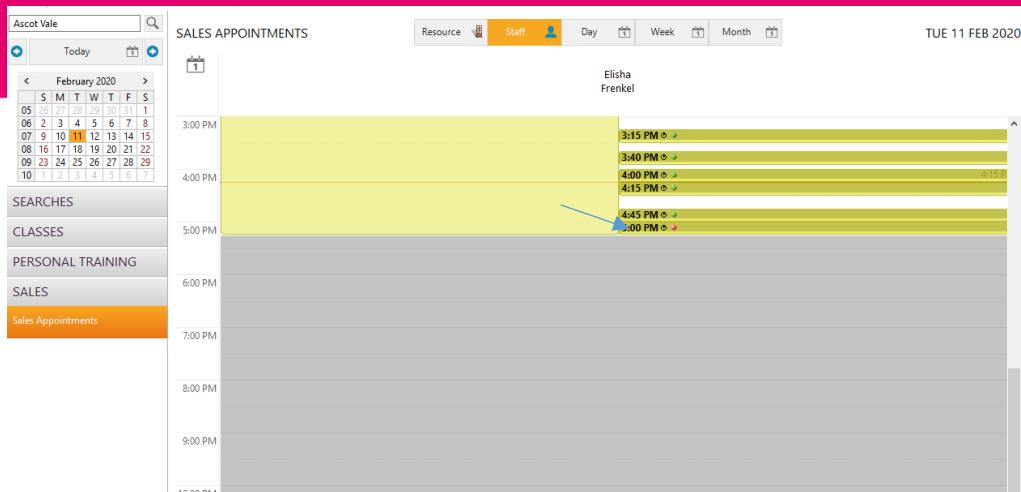
2. You can then drag and drop the appointment to the new time that the customer requests. A change time screen will then pop up.



3. Make sure that the time in here is the updated time or if it is incorrect then please add in the correct time. Then click OK.



4. The appointment will now show as the updated time.



Cancel an appointment and schedule a follow up call

1. If a lead does not show up to their Sales Appointment and is never marked as a 'Show Up' then the system will automatically update the lead to be a no show and transition the lead to the next step which is Reschedule Appointment.

The screenshot shows the Reschedule Appointment screen for Jess Fast. It includes contact information (+61 3 9555 2222 [Home], +61 4 9955 5222 [Mobile], jess.fast@test.com [E-mail]), appointment history (RESCHEDULE APPOINTMENT, LEAD, WEBSITE), and a 'Call' button highlighted with a blue arrow.

2. Click the Call button and then physically call the lead to reschedule the sales appointment.

The screenshot shows the Reschedule Appointment screen for Princess Diana. It includes contact information (+61 3 9852 1479 [Home], +61 4 2385 5699 [Mobile], me.too@test.com [E-mail]), appointment history (RESCHEDULE APPOINTMENT, LEAD, WEBSITE), and a 'Call' button highlighted with a blue arrow.

3. Pending that the lead answers and wants to book an appointment then you will be taken back to the calendar to follow the steps to book a sales appointment as you did previously. If the lead does not answer your call then you will record the user choice from the list in the Call screen after you click the call button. Then click the FINISH button.



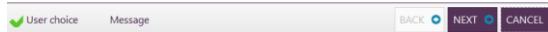
4. The lead will then transition to the Reschedule Appointment 2 stage of the flow.

Post Tour Call

1. Follow the instruction to book a sales appointment (tour).
2. There are two options which will result in a Post Tour Call – these are either the Send Information Email button or the No Sale Button.

3. First, click on the Send Information Email button.

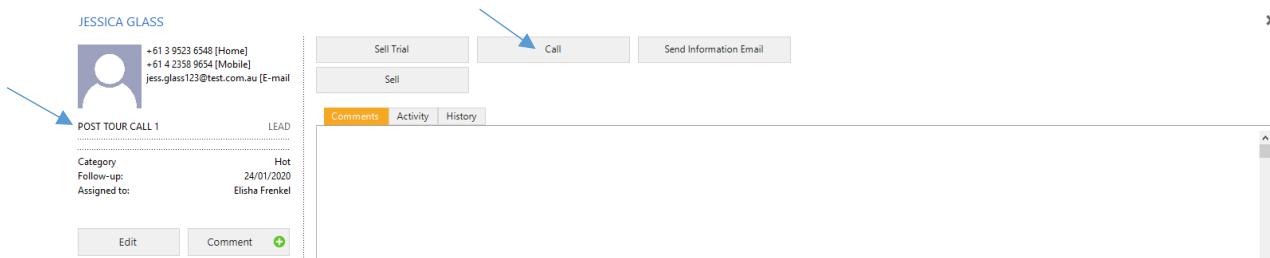
4. Then click on the radio button next to Answer – Request Email in the Send Information pop up screen. Then click the Next button.



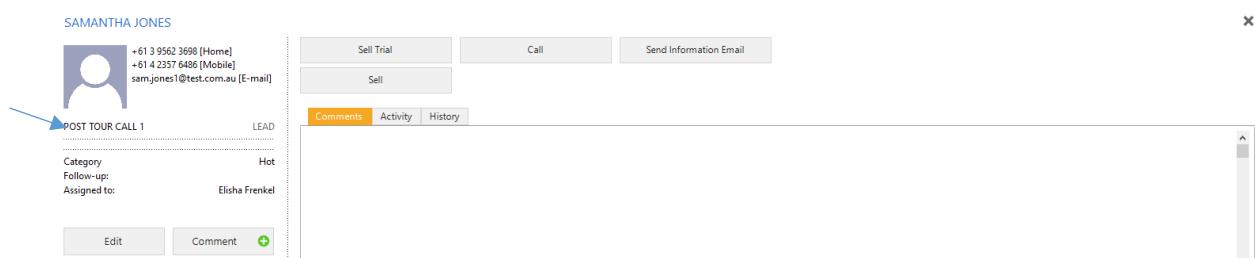
5. Click on the tick box next to Send Info Email. Then click the FINISH button.



6. The lead will then transition to the Post Tour Call 1 stage. Here you can click on the Call button to schedule a call.



7. Alternatively, if you click on the No Sale button then the lead will transition straight to the Post Tour Call 1 stage.



Alternative CRM Bookings

The CRM can be used to book three appointment types.

- 1) **Sales appointment** – for all standard tours of leads
- 2) **Renewal** – for all PIF membership renewals
- 3) **Member Save** – for current members wishing to cancel a member save appointment can be booked to meet with the sales consultant to help save the member and reinspire them on their journey.

Select activity

No activity has been selected

Which activity should the booking have?

Center	Fernwood HQ	Search
Activity	<input checked="" type="radio"/> All <input type="radio"/> Sales	
Member Save Appointment Renewal Appointment Sales Appointment		

Next Cancel

My call list for today

1. Your call list for the day can be found in the CRM section of Exerp.
2. Click on the On-hold section under ‘Lead Management’.

LEAD MANAGEMENT

Unassigned (4)
Open (4)
Pending (2)
On-hold (7)
Closed
Deleted
Overdue (0)

Scope: Ascot Vale Assigned to: Me Date filter: No date filter Date interval: Next week

Category: All Person: Search Date filter: No date filter Date interval: Next week

Activity: All

Step	Title	Person	Status	Follow-up	Created date	Last update
Reschedule Appointment 2	Website	Princess Diana	Lead	Today 11:30	Yesterday	Today
Reschedule Appointment 2	Website	Elisha Fink	Lead	7 days ago	7 days ago	7 days ago
Tour Booked		Jessica Smart	Lead	Yesterday	Vesterday	Vesterday
Post Tour Call 1		Samantha Jones	Lead	Today	Today	Today
Post Trial Call 2		Sarah Dickens	Active	Today	Today	Today

3. All of the people who appear in the list are people that require a call.
4. You can sort this by newest to oldest calls by clicking on the Follow-up tab and adjusting newest to oldest or vice versa.

LEAD MANAGEMENT

Unassigned (4)
Open (4)
Pending (2)
On-hold (7)
Closed
Deleted
Overdue (0)

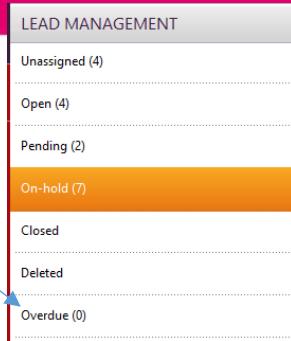
Scope: Ascot Vale Assigned to: Me Date filter: No date filter Date interval: Next week

Category: All Person: Search Date filter: No date filter Date interval: Next week

Activity: All

Step	Title	Person	Status	Follow-up	Created date	Last update
Reschedule Appointment 2	Website	Princess Diana	Lead	Today 11:30	Yesterday	Today
Reschedule Appointment 2	Website	Elisha Fink	Lead	7 days ago	7 days ago	7 days ago
Tour Booked		Jessica Smart	Lead	Yesterday	Vesterday	Vesterday
Post Tour Call 1		Samantha Jones	Lead	Today	Today	Today
Post Trial Call 2		Sarah Dickens	Active	Today	Today	Today

- If you do not action the Follow-up in time then the leads will appear under 'Overdue'.



How to view all closed leads

- On the left-hand side of the CRM app you will see the different status in the lead management flow. Closed leads refer to leads who are sitting at the closed stage of the lead management flow i.e. sale has occurred or no sale. You are able to re-open these leads by creating a new task with the name of the closed lead.

Step	Title	Person	Status	Assigned to	Follow-up	Created date	Last update
Sale	Website	Alicia Silverstone	Active	Elisha Frenkel		Today	Today
Sale	Website	Sally Smith	Active	Elisha Frenkel		5 days ago	5 days ago
Sale		CRM Lead	Active	Exerp Support (TK)		6 days ago	6 days ago
Sale		Sally Smith	Active	Elisha Frenkel		6 days ago	6 days ago
Sale	Phoned in	Sandra Bullock	Lead	Elisha Frenkel		6 days ago	6 days ago
Sale		Katie Holmes	Lead	Elisha Frenkel		6 days ago	6 days ago
Sale		Sally Smith	Active	Elisha Frenkel		13 days ago	6 days ago
Sale		Diana King	Lead	Elisha Frenkel		7 days ago	7 days ago
Sale		Emma Roberts	Lead	Elisha Frenkel		13 days ago	7 days ago
Sale	Social	Lady Dana	Lead	Mandy Johnson		14 days ago	14 days ago
Sale		Caitlin Jury	Lead	Elisha Frenkel		28/01/2020	28/01/2020

How to view my leads VS all leads

- In the CRM app in Exerp you can limit your view to see all leads in the CRM for your club versus all leads assigned to you.
- You would instruct your sales teams to be in the habit of viewing all leads to ensure none are getting missed.
- At the top of the CRM app you will see a field called Assigned to.



The screenshot shows the Lead Management interface. The left sidebar has sections for FRONT DESK and CLASSES. The main area displays a table of leads with columns: Step, Title, Person, Status, Assigned to, Follow-up, Created date, and Last update. A red box highlights the 'Assigned to' dropdown set to 'All'. The table data includes:

Step	Title	Person	Status	Assigned to	Follow-up	Created date	Last update
Tour Completed	Social	Leah Jay	Prospect	Elisha Frenkel	Yesterday 16:45	Yesterday	Yesterday
Reschedule Appoi...	Website	Jess Fast	Lead	Elisha Frenkel	Yesterday 16:30	Yesterday	Yesterday
Tour Completed	Social	Dianna Pear	Prospect	Elisha Frenkel	Yesterday 16:15	Yesterday	Yesterday
Tour Completed		Letty Letterson	Inactive	Exerp Support (TK)	Yesterday 15:40	9 days ago	Yesterday
Tour Completed	Testing Regression		Inactive	Exerp Support (TK)	Yesterday 15:27	13 days ago	Yesterday
Tour Booked	Social	Stacey Pickle	Prospect	Elisha Frenkel	Yesterday 15:15	Yesterday	Yesterday
Reschedule Appoi...	Website	Carly Mouse	Lead	Elisha Frenkel	Yesterday 11:45	Yesterday	Yesterday

- If you would like to view all leads then you should choose Assigned to: All

The screenshot shows the Lead Management interface. The left sidebar has sections for FRONT DESK and CLASSES. The main area displays a table of leads with columns: Step, Title, Person, Status, Assigned to, Follow-up, Created date, and Last update. A blue arrow points to the 'Assigned to' dropdown set to 'Me'. The table data includes:

Step	Title	Person	Status	Assigned to	Follow-up	Created date	Last update
Tour Completed	Social	Leah Jay	Prospect	Elisha Frenkel	Yesterday 16:45	Yesterday	Yesterday
Reschedule Appoi...	Website	Jess Fast	Lead	Elisha Frenkel	Yesterday 16:30	Yesterday	Yesterday
Tour Completed	Social	Dianna Pear	Prospect	Elisha Frenkel	Yesterday 16:15	Yesterday	Yesterday
Tour Completed		Letty Letterson	Inactive	Exerp Support (TK)	Yesterday 15:40	9 days ago	Yesterday
Tour Completed	Testing Regression		Inactive	Exerp Support (TK)	Yesterday 15:27	13 days ago	Yesterday
Tour Booked	Social	Stacey Pickle	Prospect	Elisha Frenkel	Yesterday 15:15	Yesterday	Yesterday
Reschedule Appoi...	Website	Carly Mouse	Lead	Elisha Frenkel	Yesterday 11:45	Yesterday	Yesterday

- If you would like to view all leads assigned to you then choose Assigned to: Me

The screenshot shows the Lead Management interface. The left sidebar has sections for FRONT DESK, CLASSES, and CALENDAR. The main area displays a table of leads with columns: Step, Title, Person, Status, Follow-up, Created date, and Last update. A blue arrow points to the 'Assigned to' dropdown set to 'All'. The table data includes:

Step	Title	Person	Status	Follow-up	Created date	Last update
Tour Completed		Anthony Vandijk	Lead	5/02/2020 10:15 PM	7 days ago	7 days ago
Reschedule Appointm...		Jessica Lane	Prospect	6/02/2020 5:00 PM	7 days ago	7 days ago
Tour Booked		Tracey Small	Prospect	6/02/2020 9:15 PM	9 days ago	7 days ago
Tour Completed		Simon Thorpe	Lead	7/02/2020 10:00 AM	7 days ago	5 days ago
Reschedule Appointm...	Website	Carly Mouse	Lead	Yesterday 11:45	Yesterday	Yesterday
Tour Booked	Social	Stacey Pickle	Prospect	Yesterday 15:15	Yesterday	Yesterday
Tour Completed	Social	Dianna Pear	Prospect	Yesterday 16:15	Yesterday	Yesterday
Tour Completed	Social	Leah Jay	Prospect	Yesterday 16:45	Yesterday	Yesterday
Reschedule Appointm...	Website	Jess Fast	Lead	Yesterday 16:30	Yesterday	Yesterday

Where are my overdue calls?

- Overdue calls will fall into the overdue status in the lead management flow. To view your list of overdue calls you will need to click on the overdue status in the lead management flow.

LEAD MANAGEMENT

Scope Ascot Vale

Assigned to Me

Date filter No date filter

Category All

Person Search

Date interval Last week

Step	Title	Person	Status	Follow-up	Created date	Last update

New lead New task Bulk edit

Unassigned (2) Open (9)

Pending (5) On-hold (3)

Closed Deleted Overdue (0)

FRONT DESK CLASSES CALENDAR PERSON MEMBERSHIP SALE CRM DEBT MANAGEMENT

Where are my closed lead and how do I reopen them?

1. You are able to locate all of your closed leads in the closed status in the lead management flow and also by choosing all leads assigned to me.

LEAD MANAGEMENT

Scope Ascot Vale

Assigned to Me

Date filter Last update

Category All

Person Search

Date interval Last 3 months

Step	Title	Person	Status	Follow-up	Created date	Last update
Sale	Website	Alicia Silverstone	Active		Today	Today
Sale	Website	Sally Smith	Active		5 days ago	5 days ago
Sale		Sally Smith	Active		6 days ago	6 days ago
Sale	Phoned in	Sandra Bullock	Lead		6 days ago	6 days ago
Sale		Katie Holmes	Lead		6 days ago	6 days ago
Sale		Sally Smith	Active		13 days ago	6 days ago
Sale		Diana King	Lead		7 days ago	7 days ago
Sale		Emma Roberts	Lead		13 days ago	7 days ago
Sale	Social	Caitlin Fury	Lead		28/01/2020	28/01/2020

New lead New task Bulk edit

Unassigned (2) Open (9)

Pending (5) On-hold (3)

Closed Deleted Overdue (0)

FRONT DESK CLASSES CALENDAR PERSON MEMBERSHIP SALE CRM DEBT MANAGEMENT

2. In order to re-open a closed lead you are able to click on the new task button at the bottom of the screen and then type in the name of lead you would like to reopen and it will take you back to the beginning of the lead management flow (lead – 1st contact).

LEAD MANAGEMENT

Scope: Ascot Vale Assigned to: Me

Category: All Date filter: Last update

Step	Title	Person	Status	Follow-up	Created date	Last update
Sale	Website	Alicia Silverstone	Active	Today	Today	
Sale	Website	Sally Smith	Active	5 days ago	5 days ago	
Sale		Sally Smith	Active	6 days ago	6 days ago	
Sale	Phoned in	Sandra Bullock	Lead	6 days ago	6 days ago	
Sale		Katie Holmes	Lead	6 days ago	6 days ago	
Sale		Sally Smith	Active	13 days ago	6 days ago	
Sale		Diana King	Lead	7 days ago	7 days ago	
Sale		Emma Roberts	Lead	13 days ago	7 days ago	
Sale	Social	Caitlin Jury	Lead	28/01/2020	28/01/2020	

New lead Bulk edit

LEAD MANAGEMENT

Scope: Ascot Vale Assigned to: Me

Category: All Date filter: Last update

Step	Title	Person	Status	Follow-up	Created date	Last update
Sale	Website	Alicia Silverstone	Active	Today	Today	
Sale	Website	Sally Smith	Active	5 days ago	5 days ago	
Sale		Sally Smith	Active	6 days ago	6 days ago	
Sale	Phoned in	Sandra Bullock	Lead	6 days ago	6 days ago	
Sale		Katie Holmes	Lead	6 days ago	6 days ago	
Sale		Sally Smith	Active	7 days ago	6 days ago	
Sale		Diana King	Lead	7 days ago	7 days ago	
Sale	Social	Emma Roberts	Lead	28/01/2020	28/01/2020	

Create task

Person:

Emma Roberts
Person ID: 301p6231
Center: Ascot Vale
Status: Lead
Person type: Private
Birth date: 12/12/1992
Home phone: +61 09562 1478

New lead Bulk edit

3. You will need to add in the title again (the source that the lead came from). Then click Ok.

LEAD MANAGEMENT

Unassigned (2)

Open (9)

Pending (5)

On-hold (3)

Closed

Deleted

Overdue (0)

Scope Ascot Vale

Category All

Assigned to Me

Person Search

Date filter Last update

Date interval Last 3 months

Step	Title	Person	Status	Follow-up	Created date	Last update
Sale	Website	Alicia Silverstone	Active		Today	Today
Sale	Website	Sally Smith	Active		5 days ago	5 days ago
Sale		Sally Smith	Active		6 days ago	6 days ago
Sale	Phoned in	Sandra Bullock				
Sale		Katie Holmes				
Sale		Sally Smith				
Sale		Diana King				
Sale		Emma Roberts				
Sale	Social	Caitlin Jury				

LEAD MANAGEMENT

Unassigned (2)

Open (9)

Pending (5)

On-hold (3)

Closed

Deleted

Overdue (0)

Scope Ascot Vale

Category All

Assigned to Me

Person Search

Date filter Last update

Date interval Last 3 months

Step	Title	Person	Status	Follow-up	Created date	Last update
Sale	Website	Alicia Silverstone	Active		Today	Today
Sale	Website				5 days ago	5 days ago
Sale	Phoned in				6 days ago	6 days ago
Sale					6 days ago	6 days ago
Sale					13 days ago	6 days ago
Sale					7 days ago	7 days ago
Sale					13 days ago	7 days ago
Sale	Social				28/01/2020	28/01/2020

- The lead will then sit as assigned until you click on the next action for this lead and then the lead will be assigned to you (or whoever clicked on the action).

How to resend the Welcome Email

- Click on the large magnifying glass at the top left corner of Exerp and type in the name of the member you would like to resend the welcome email to.

2. Double click on the name of the member when it populates her details.

3. Under Sally's name there are a number of options – click on Journal.

4. Click on messages in the row of options under Journal.

Created date	Delivery date	Delivery method	Delivered by	Subject	From	Channel	Person	Charge	Messaging Category
7/02/2020 09:17	7/02/2020 09:17	E-mail	ClubLead	Welcome to Fernwood	301p6233	E-mail	301p6233		None
7/02/2020 09:01	13/02/2020 16:00	E-mail	ClubLead	Deferral ending	301p6233	E-mail	301p6233		None
6/02/2020 10:33	6/02/2020 11:02	E-mail	ClubLead	Welcome to Fernwood	301p6233	E-mail	301p6233		None
6/02/2020 09:02		Canceled	ClubLead	Deferral Request	301p6233	E-mail	301p6233		None
6/02/2020 09:30	10/02/2020 15:00	E-mail	ClubLead	Deferral Request	301p6233	E-mail	301p6233		None
6/02/2020 09:28	6/02/2020 11:12	E-mail	ClubLead	Deferral Request	301p6233	E-mail	301p6233		None
6/02/2020 09:25	6/02/2020 09:25	E-mail	ClubLead	Welcome to Fernwood	301p6233	E-mail	301p6233		None

5. Click on the row where the subject is 'Welcome to Fernwood'.

Sally Smith

Journal

Created date	Delivery date	Delivery me...	Delivered by	Subject	From	Channel	Person	Charge	Messaging Category
7/02/2020 09:17	7/02/2020 09:17	E-mail	ClubLead	Welcome to Fenwood	E-mail	301p6233			None
7/02/2020 01:01	13/02/2020 16:...	E-mail	ClubLead	Deferral ending	E-mail	301p6233			None
6/02/2020 10:33	6/02/2020 11:02	E-mail	ClubLead	Welcome to Fenwood	E-mail	301p6233			None
6/02/2020 10:30		Cancelled	ClubLead	Deferral Request	E-mail	301p6233			None
6/02/2020 09:30	10/02/2020 15:...	E-mail	ClubLead	Deferral Request	E-mail	301p6233			None
6/02/2020 09:28	6/02/2020 11:12	E-mail	ClubLead	Deferral Request	E-mail	301p6233			None
6/02/2020 09:25	6/02/2020 09:25	E-mail	ClubLead	Welcome to Fenwood	E-mail	301p6233			None

6. Click the button at the bottom of the page that says 'Resend messages'.

Sally Smith

Journal

Created date	Delivery date	Delivery me...	Delivered by	Subject	From	Channel	Person	Charge	Messaging Category
7/02/2020 09:17	7/02/2020 09:17	E-mail	ClubLead	Welcome to Fenwood	E-mail	301p6233			None
7/02/2020 01:01	13/02/2020 16:...	E-mail	ClubLead	Deferral ending	E-mail	301p6233			None
6/02/2020 10:33	6/02/2020 11:02	E-mail	ClubLead	Welcome to Fenwood	E-mail	301p6233			None
6/02/2020 10:30		Cancelled	ClubLead	Deferral Request	E-mail	301p6233			None
6/02/2020 09:30	10/02/2020 15:...	E-mail	ClubLead	Deferral Request	E-mail	301p6233			None
6/02/2020 09:28	6/02/2020 11:12	E-mail	ClubLead	Deferral Request	E-mail	301p6233			None
6/02/2020 09:25	6/02/2020 09:25	E-mail	ClubLead	Welcome to Fenwood	E-mail	301p6233			None

Resend messages

Reports App

Various reports are available under the reports section of the menu.

Menu > Reports App

These reports are fairly high level and there is not much opportunity to drill down into these reports.

Active subscriptions
 Booking restrictions
 Cash Register Closing Summary
 Cash Register Sales
 Cash Register Summary
 Class-to-individual
 Classes
 Daily summary
 Deferred Clipcard Revenue
 Deferred Subscription Revenue
 Demographics
 Export batch
 Finance Export
 Finance Summary
 Inventory Status
 Multisector
 New leads
 Outstanding gift cards
 Payment control
 Payment management
 Product catalogue
 Refunds
 Remaining clips on clip cards
 Retail Sales
 Sales
 Saved free subscription days
 Subscription add-ons
 Subscription evolution
 Subscription expiration
 Subscription prices
 Subscription sales
 Todo Progress
 Training frequency
 Unplaced payments
[Visit](#)

Report Definitions from commonly used reports available in the Reports App

Report	Target Audience	Definition
Classes	Club	The classes report shows the number of classes, bookings, show-ups and absentees as well as additional information on the class i.e. the number of actual participations compared to the available number of seats for the classes.
Demographics	Club	The Demographics report shows persons grouped by ages and gender.
Visit Reports	Club	The Visits report shows check-ins, attends and class show-ups in a club, e.g. the number of visits in a club and what the members did during the visit.
Multi Sector	Club	The Multisector report shows attends into different resource happened during the visit of a club by the members.
New Leads Report	Club	The New Leads report shows new leads created by period of time, scope and employee.
Class – to – Individual	Club	The class-to-individual report shows info on classes and individual training.
Remaining Clips Cards on Clip Report	Club	Remaining clip card (sessions) on clip purchases for members
Daily Summary Report	Club	The Daily Summary report shows a summary of the activities in a club from a financial point of view. It is based solely on the finance transactions for a club in specific period and all financial movements are included in the report
Cash Register Closing Summary	Club	The Cash Register Closing Summary
Retail Sales Report	Finance	The Retail Sales report shows the sales, costs and profit margins of the retail sales per product in both

		units and amounts for a chosen date period. You can use this to see the profit margin on different products, product groups and suppliers.
Deferred Subscription Revenue Report	Finance	Report on deferred revenue
Subscription Expiration	Finance	The Subscription Expiration report shows all memberships with an end date in the defined date interval i.e. Paid in full memberships coming up for expiry
Subscription Evolution Report	Finance	The report Subscription Evolution will show the number of subscriptions at the beginning of a chosen period and at the end of this period.
Deferred Clip Card Revenue	Finance	In Exerp clip card sale is recognised as revenue, when the clip card is sold. This report shows the realised and deferred clips and related revenue for clip cards.
Finance Summary Report	Finance	The Finance Summary report provides a summary of the financial transactions on each account.
Subscription Sales	Club/Finance	The subscription sales report shows the sale of subscriptions for a report period or chosen date interval.
Subscription Prices Report	Club/Finance	The subscription prices report can be used to see the prices of all subscription products or to calculate the sum of subscriptions price changes.
Finance Export	Finance	The Finance Export report provides a summary of the financial transactions on each account in Exerp based on the book time of the transactions in Exerp. It includes all financial transactions created in Exerp with a book time within the chosen report period.
Active Subscriptions	Club/Finance	The Active subscriptions report shows the total number of active memberships and average prices on the day of generation. It has different grouping options giving for example total number, amounts and average by membership type, person type or by club. You can also use it to see the ratio between cash (PIF/trials) and EFT (DD) memberships by club and region.
Sales Reports	Finance	The Sales reports shows the sum of invoices and credit notes generated within a given period.

Direct Debit Reports

Report to view a list of which members have been direct debited and the amounts they have been charged.

Menu > reports > extract wizard > franchisee > 'Periodical DAB Report – Detailed Billing' > enter date of the direct debit in the from and to boxes > click next > extract to excel > finish.

Go to the reports app in Exerp, and click on 'Extract Wizard'. Select the 'Franchisee' group of extracts and click next.

Scroll down to the report called ‘Periodical DAB Report – Detailed Billing’.

Click next.

From Date: enter the date of the direct debit.

To Date: enter the date of the direct debit.

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Click next.

Right click to export the data to excel.

In order to close the extract box in Exerp click finish.

Rejection Reports

Report to view your members who have rejected.

Menu > reports > extract wizard > franchisee > ‘Rejections Bank Account’ or ‘Rejections Credit Card’ > billing start = day before debit > billing end = day of debit > next > extract to excel > finish.

Go to the reports app in Exerp, and click on ‘Extract Wizard’.

Select the ‘Franchisee’ group of extracts and click next.

Scroll down to the reports called ‘Rejections – Bank Account’ and ‘Rejections – Credit Card’.

In order to extract a listing of your bank account rejections, choose the ‘Rejections – Bank Account’ report and click next.

In the billing start date: enter the day before the day of the debit that you are extracting data for.
For example if the debit you are extracting rejections for was on the 30/04/2020, enter the 29/04/2020.

In the billing end date: enter the date of the direct debit.

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Click next.

Right click to export the data to excel.

In order to close the extract box in Exerp click finish.

Future Direct Debit - Estimate

Report to extract an estimate of what your next direct debit is going to be.

Menu > reports > extract wizard > franchisee > 'Estimate of Future Direct Debits > select either 'Even Thursdays' or 'Odd Thursdays' > click next > extract to excel > finish.

Go to the reports app in Exerp, and click on 'Extract Wizard'.

Select the 'Franchisee' group of extracts and click next.

Scroll down to the report called 'Estimate of Future Direct Debits'.

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Payment Cycle: Click on either 'Even Thursdays' or 'Odd Thursdays' to select which direct debit you are extracting data for. Refer to the direct debit calendar to determine which direct debit week your club debits are in.

Click next.

Right click to export the data to excel.

Once the data is in excel it is important to note that members may appear multiple times in the report. The reason for this is that members may have multiple subscriptions, ie: membership, personal training, food coaching. Therefore, a member will appear in the report for each subscription that she has.

If reviewing this report throughout the fortnight prior to the billing processes being run, (ie: Tuesday and earlier prior to a debit day) column E will reflect the account balance which is made up of any new invoices raised throughout the fortnight, or any debt outstanding. The new subscription charges that will be included in the next direct debit will not yet reflect in this column as billing processes have not been run. Billing processes will only run on Tuesday night.

You will need to take the following into account to determine what your direct debit will be:

- Column C is the amount that will be picked up when billing processes are run on Tuesday night and is likely to be what the member will be charged.
However:
 - Column O and P indicate the dates that members are on freeze for (freeze start and end dates). Therefore, it is recommended that you review the freeze dates for each member and reduce the amount in column C to be a freeze fee of \$8.00 or less. Also, ensure that you remove multiple subscriptions. For example, if a member has a subscription for membership and for personal training, she will not be charged a freeze fee for each subscription, she will only be charged \$8.00 for the membership subscription, therefore ensure that the price for any additional subscriptions is set to \$0.00.
 - Column S and T indicate the dates that members are on free time for (free period start and end dates).

Therefore, it is recommended that you review the free time dates for each member and reduce the amount in column C to \$0.00 for all subscriptions for members who will be on free time during the next direct debit.

- Note: Column J reflects the fortnightly instalment amount that has been placed in an instalment plan. These amounts are not included in either the subscription price column C or the account balance column E.

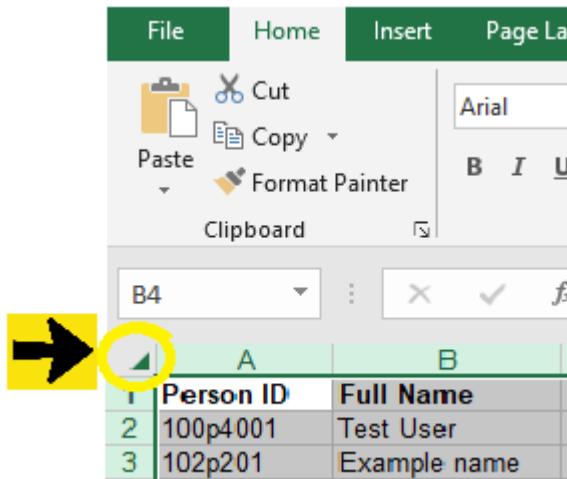
Once the above has been reviewed and taken into account, the sum of column C, column E + column J will provide an indication of what your next direct debit is going to be.

If reviewing this report on a Wednesday the day prior to a direct debit after billing processes have run, column E will show the account balance for all amounts that will be direct debited. This includes invoices raised throughout the fortnight, outstanding debt, and any regular direct debit

amounts for any subscriptions. If reviewing the report on a Wednesday, you must ensure that you remove all duplicate members from the report, if this is not done members will be counted multiple times.

How to remove duplicate members quickly and easily in excel:

Highlight the excel spreadsheet by clicking on the top left hand box:



A screenshot of Microsoft Excel showing a table of data. The table has columns labeled 'Person ID' and 'Full Name'. The rows contain data points 1, 2, and 3. A yellow arrow points to the top-left corner of the selection box, which is highlighted with a yellow circle. The ribbon at the top shows the 'Home' tab selected. The table is pasted into the clipboard.

	A	B
1	Person ID	Full Name
2	100p4001	Test User
3	102p201	Example name

Click on the data tab in excel, then under the data tools menu click remove duplicates.

Unselect all and select only 'Person ID'.

Click ok.

The sum of column E + column J will provide an indication of what your next direct debit is going to be.

Payment Cycle Report

Report to identify which members are on each payment cycle.

Menu > reports > extract wizard > franchisee > 'Payment Cycles' > scope = club name > click next > extract to excel > finish.

Go to the reports app in Exerp, and click on 'Extract Wizard'.

Select the 'Franchisee' group of extracts and click next.

Scroll down to the report called 'Payment Cycles'.

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Click next.

Right click to export the data to excel.

Sort or filter by column D to show members on each payment cycle.

In order to close the extract box in Exerp click finish.

Royalty Invoicing Reports

Reports to review details that make up royalty invoices.

Periodical DAB Report – Detailed Billing

Menu > reports > extract wizard > franchisee > ‘Periodical DAB Report – Detailed Billing’ > enter the start and end dates for the period royalties cover > click next > extract to excel > finish.

Go to the reports app in Exerp, and click on ‘Extract Wizard’.

Select the ‘Franchisee’ group of extracts and click next.

Scroll down to the report called ‘Periodical DAB Report – Detailed Billing’.

Click next.

From Date: enter the start date that royalties cover

To Date: enter the end date that royalties cover

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Click next.

Right click to export the data to excel.

Using column F - remove any members who have rejected.

The sum of column E makes up the amount that will incur royalty charges that relates to direct debit income.

In order to close the extract box in Exerp click finish.

Periodical DAB Report – Detailed POS

Menu > reports > extract wizard > franchisee > ‘Periodical DAB Report – Detailed POS’ > enter the start and end dates for the period royalties cover > click next > extract to excel > finish.

Go to the reports app in Exerp, and click on ‘Extract Wizard’.

Select the ‘Franchisee’ group of extracts and click next.

Scroll down to the report called ‘Periodical DAB Report – Detailed POS’.

Click next.

From Date: enter the start date that royalties cover

To Date: enter the end date that royalties cover

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Click next.

Right click to export the data to excel.

The sum of column D makes up the amount that will incur royalty charges that relates to POS sales.

In order to close the extract box in Exerp click finish.

Payroll Reports

Payroll – PT Report

Report to be able to pay personal trainers for sessions conducted.

Menu > reports > extract wizard > franchisee > ‘Payroll – PT Report’ > date from = start date of payroll fortnight > end date = end date of payroll fortnight > scope = club name > click next > extract to excel > finish.

Go to the reports app in Exerp, and click on ‘Extract Wizard’.

Select the ‘Franchisee’ group of extracts and click next.

Scroll down to the report called ‘Payroll – PT Report’.

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Click next.

Right click to export the data to excel.

Review the report and sort/filter to extract the relevant data for payroll.

In order to close the extract box in Exerp click finish.

Group Fitness Report

Report to be able to pay group fitness instructors for classes conducted.

Menu > reports > extract wizard > franchisee > ‘Group Fitness Report’ > date from = start date of payroll fortnight > end date = end date of payroll fortnight > scope = club name > click next > extract to excel > finish.

Go to the reports app in Exerp, and click on ‘Extract Wizard’.

Select the ‘Franchisee’ group of extracts and click next.

Scroll down to the report called ‘Group Fitness Report’.

Scope: If you own multiple clubs change the scope to be the club that you are extracting data for.

Click next.

Right click to export the data to excel.

Review the report and sort/filter to extract the relevant data for payroll.

In order to close the extract box in Exerp click finish.

Revenue Breakdown

Report to be able to split revenue types for P&L (Profit & Loss) Reporting

Menu > reports > finance summary > scope = club name > period = interval > start date = first day of month > stop date = last day of month > view report or export to excel.

Go to the reports app in Exerp, and click on 'Finance Summary'.

Change the scope If you own multiple clubs change the scope to be the club that you are extracting data for.

Period: change to interval.

Start Date: first day of the month.

Stop Date: last day of the month.

View the report or export to excel.

The total column will provide a \$ figure exclusive of GST for each income area for the month.

This total makes up both direct debit income and POS income.

Some income areas appear more than once in the report, this is due to the way that our global accounts have been set up, this simply means that you need to add these amounts together.

Simply journal/reallocate the revenue in your accounting software into the relevant income accounts in order to finalise your month end accounts and to submit your profit and loss report to us each month.

Id	Account	Book Date	Debit	Credit	Total	VAT	VAT Rate	VAT Type
Sales								
146.410	Income Membership Fees		1105.31	-46.98	1058.33	0.00		
0								
146.410	Income Membership Fees		7246.29	-52086.23	-44839.94	-4485.31	10.00	02.00.2102
0								
146.410	Deferred Revenue (sales)		10.00	0.00	10.00	0.00		
0.3								
146.410	Income Personal Training		6053.46	0.00	6053.46	0.00		
2								
146.410	Income Personal Training		0.00	-3980.21	-3980.21	-398.02	10.00	02.00.2102
2								
146.410	Income Merchandise		0.00	-72.60	-72.60	-7.25	10.00	02.00.2102
3								
146.410	Income Other		390.83	-188.18	202.65	20.26	10.00	02.00.2102
6								
146.411	Income Activation Kit		180.90	-2391.75	-2210.85	-221.15	10.00	02.00.2102
1								
146.411	Income Wellness		0.00	-502.74	-502.74	-50.26	10.00	02.00.2102
3								
146.411	Income Wellness		2111.45	0.00	2111.45	0.00		
3								
146.421	Income FIIT30		95.00	0.00	95.00	0.00		
2								
146.421	Income FIIT30		522.05	-2069.45	-1547.40	-154.73	10.00	02.00.2102
2								
146.440	Income Recouped Funds		8.94	0.00	8.94	0.89	10.00	02.00.2102
6								
			17724.23	-61338.14	-43613.91	-5295.57		
-	-	-						

Build your own reports – Easy Extracts

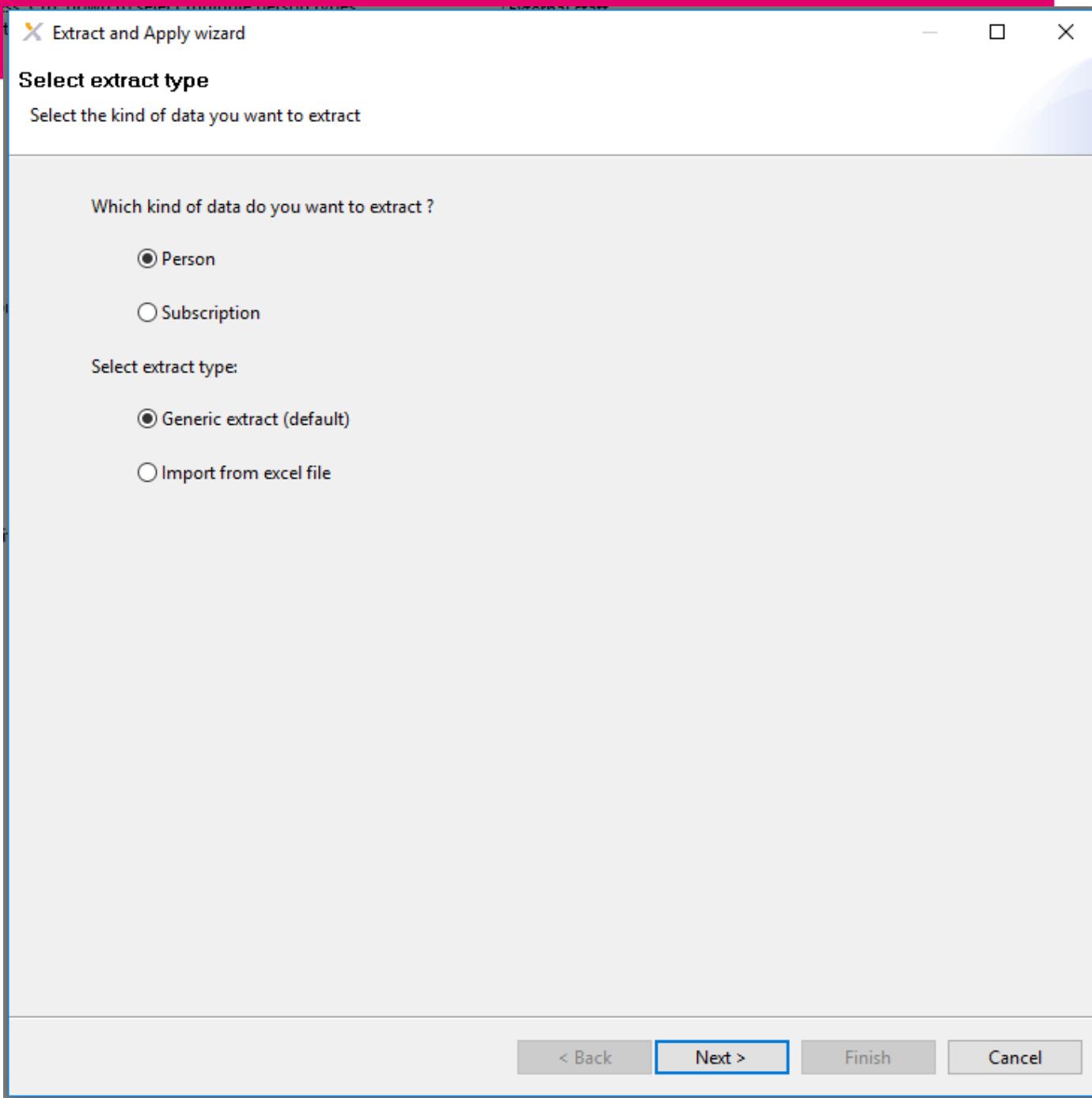
Reports App > Easy Extracts

You can build your own reports by working through the Easy Extract reports, click on Easy Extract located at the bottom of the reports menu.

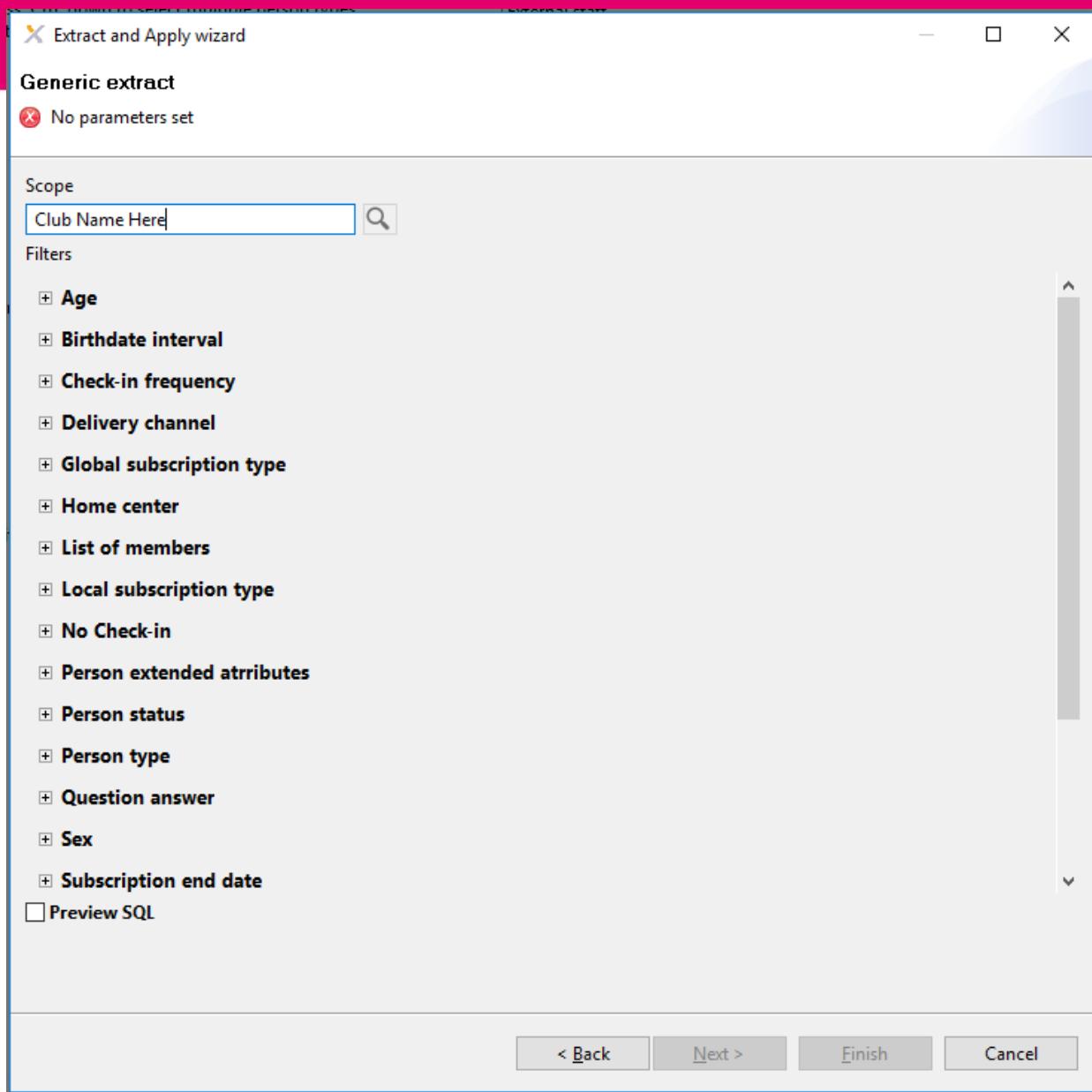
Easy Extract

Once clicking on Easy Extract you can choose to extract data on a person level or a subscription level.

There is no need to change the extract type – generic extract should be used.



Once in the reporting criteria, use the filtering boxes to drill down into the information you are looking for.



Active Members Report

For example you may want to know who all your active members are, filter by person status and select active.

Filters

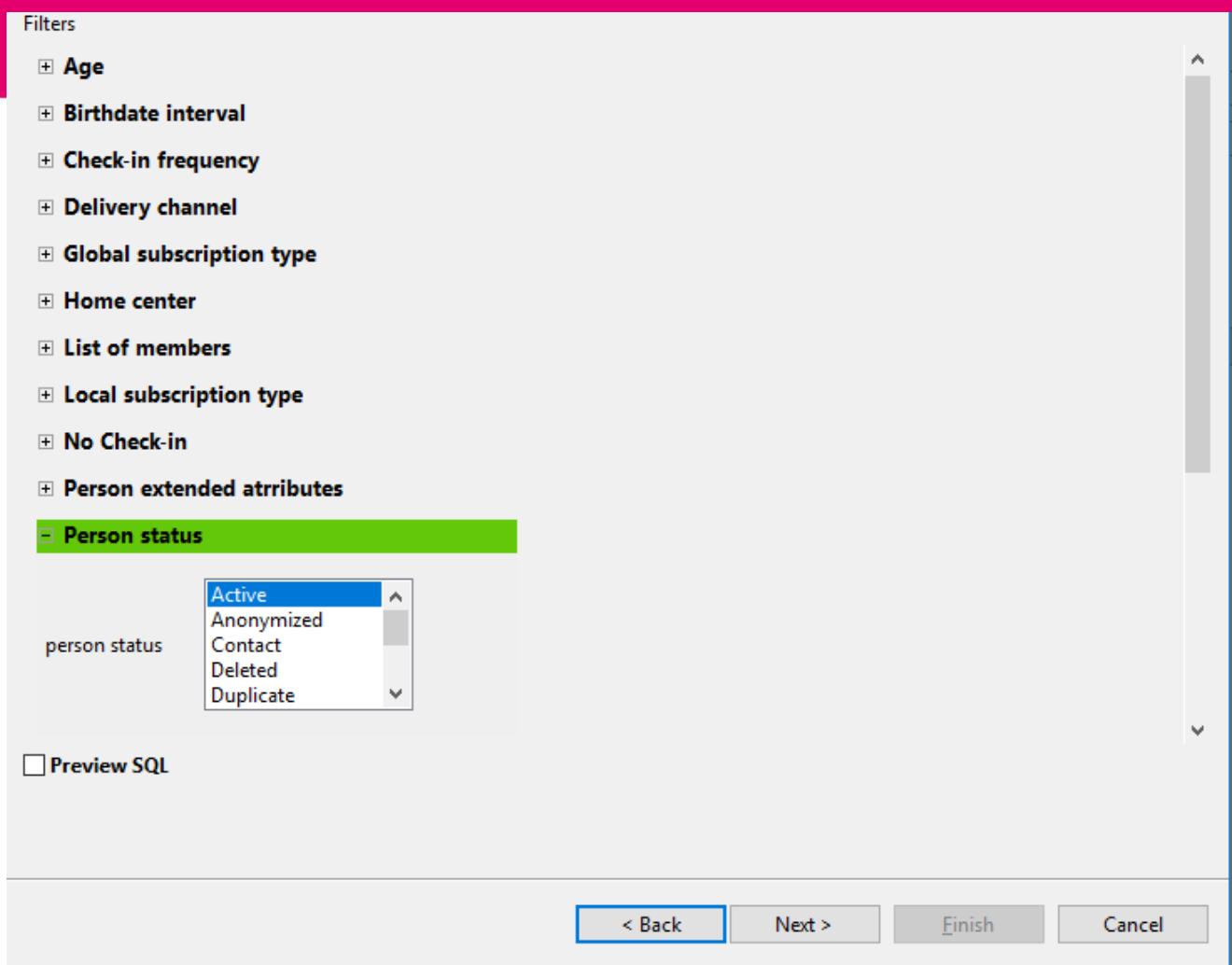
- Age**
- Birthdate interval
- Check-in frequency
- Delivery channel
- Global subscription type
- Home center
- List of members
- Local subscription type
- No Check-in
- Person extended attributes
- Person status

person status

- Active
- Anonymized
- Contact
- Deleted
- Duplicate

Preview SQL

[< Back](#) [Next >](#) [Finish](#) [Cancel](#)



Click the next button to progress to the next screen. You will then see a box similar to the below:

Extract and Apply wizard

Extracted data

Check extracted data

Finished extracting data (908 results found)

P	f.	c.	c.	e.	s.	p	f.	l..	s.	blacklisted	a.	a.	c.	z.	birthdate	p	friends_all...	c.	p	p	e.	m	first_active...
3.	F	F	1	A	P	F	D	F		0	1	A	3	6/07/1979			B		h			5/10/2017	
3.	P	F	1	A	P	P	S	F		0	1	A	3	8/11/1972			A		p			23/01/2017	
3.	D	F	1	A	P	D	C	F		0	5	A	3	1/02/1996			C		d			3/10/2017	
3.	L	F	1	A	P	L	F	F		0	6	A	3	19/01/1973			A		f.			18/01/2017	
3.	P	F	1	A	P	P	P	F		0	6	A	3	19/10/1962			N		p			16/01/2008	
3.	F	F	1	A	P	F	G	F		0	4	A	3	20/03/1967			F		f.			17/08/2007	
3.	N	F	1	A	P	N	I.	F		0	5	A	3	24/01/1984			T		n			22/07/2018	
3.	E	F	1	A	P	E	S	F		0	1	A	3	1/07/1980			F		e			22/07/2018	
3.	S	F	1	A	P	S	S	F		0	1	A	3	23/07/1993			A		s			2/04/2016	
3.	I.	F	1	A	P	I.	C	F		0	1	A	3	29/03/2003			T		i.			25/01/2017	
3.	L	F	1	A	P	L	G	F		0	5	A	3	30/08/1987			C		l.			23/07/2018	
3.	A	F	1	A	P	A	C	F		0	4	A	3	11/06/1989			A		a			8/11/2018	
3.	C	F	1	A	P	C	T	F		0	1	A	3	13/02/1969			A		c			17/08/2007	
3.	G	F	1	A	P	G	N	F		0	3	A	3	29/09/1959			A		g			1/04/2016	

< Back

Next >

Finish

Cancel

Right click to export your report to excel or to perform other tasks.

Extract and Apply wizard

Extracted data

Check extracted data

Finished extracting data (908 results found)

P	f.	c.	c.	e.	s.	p	f.	I.	s.	blacklisted	a.	a.	c.	z.	birthdate	p	friends_all...	c.	p	p	e.	m	first_active...
3.	F	F		1	A	P	F	D	F		0	1	A	3	6/07/1979			B			h		5/10/2017
3.	P	F		1	A	P	P	S	F		0	1	A	3	8/11/1972			A			p		23/01/2017
3.	D	F		1	A	P	D	C	F		0	5	A	3	1/02/1996			C			d		3/10/2017
3.	L	F		1	A	P	L	F	F		0	6	A	3	19/01/1973			A			f.		18/01/2017
3.	P	F		1	A	P	P	P	F		0	6	A	3	19/10/1962			N			p		16/01/2008
3.	F	F		1	A	P	F	G	F		0	4				Excel XLS		F			f.		17/08/2007
3.	N	F		1	A	P	N	I.	F		0	5				Excel XLSX		T			n		22/07/2018
3.	E	F		1	A	P	E	S	F		0	1				Text CSV		F			e		22/07/2018
3.	S	F		1	A	P	S	S	F		0	1				Apply filter		A			s		2/04/2016
3.	I.	F		1	A	P	I.	C	F		0	1				Remove filter		T			i.		25/01/2017
3.	L	F		1	A	P	L	G	F		0	5				Count rows		C			l.		23/07/2018
3.	A	F		1	A	P	A	C	F		0	4				Sum rows		A			a		8/11/2018
3.	C	F		1	A	P	C	T	F		0	1				Print		A			c		17/08/2007
3.	G	F		1	A	P	G	N	F		0	3	A	3	29/09/1959			A			g		1/04/2016

- Excel XLS
- Excel XLSX
- Text CSV
- Apply filter
- Remove filter
- Count rows
- Sum rows
- Print
- Copy

< Back

Next >

Finish

Cancel

Once the report is in excel you can manipulate the date however you like.

Information in this report includes data such as:

_eClub_PERSON_ID

fullname

persontype

firstname

lastname

address1

address2

city

zipcode

birthdate

phonehome
phonemobile
email
first_active_start_date
last_active_start_date
last_active_end_date
memberdays
accumulated_memberdays
unbroken_member_days
broken_member_days

Cancelled Members during a particular period Report

You may wish to see which members cancelled during a particular period, in which case you would select the subscription end date and choose the period you are wanting information from. Click next and extract the data to excel.

Filters

- + **Home center**
- + **List of members**
- + **Local subscription type**
- + **No Check-in**
- + **Person extended attributes**
- + **Person status**
- + **Person type**
- + **Question answer**
- + **Sex**
- **Subscription end date**

End date of subscription after or equal to this date

End date of subscription before or equal to this date

- + **Subscription sale type**
- **Subscription start date**

Active Student Members

You may wish to see who your active student members are, in which case you choose the person type to active and the person type to be that of student, click next and extract to excel.

Filters

- + **Home center**
- + **List of members**
- + **Local subscription type**
- + **No Check-in**
- + **Person extended attributes**

- **Person status**

person status	Active	^
	Anonymized	
	Contact	
	Deleted	
	Duplicate	▼

- **Person type**

person type Student ▾

- + **Question answer**
- + **Sex**
- + **Subscription end date**
- + **Subscription sale type**
- + **Subscription start date**
- + **Subscription state**

Various filtering options can be chosen:

You may wish to see who your active members are who renewed during a particular period. In which case you select the person status to be active, the subscription sale type to be renew and the subscription start date to select the period.

Filters

- [+] Person extended attributes**
- [+] Person status**

 - person status

 - Active
 - Anonymized
 - Contact
 - Deleted
 - Duplicate

- [+] Person type**
- [+] Question answer**
- [+] Sex**
- [+] Subscription end date**
- [+] Subscription sale type**

 - Subscription sales type Renew

- [+] Subscription start date**

 - Start date of subscription after or equal to this date 1/11/2019
 - Start date of subscription before or equal to this date 31/12/2019

- [+] Subscription state**

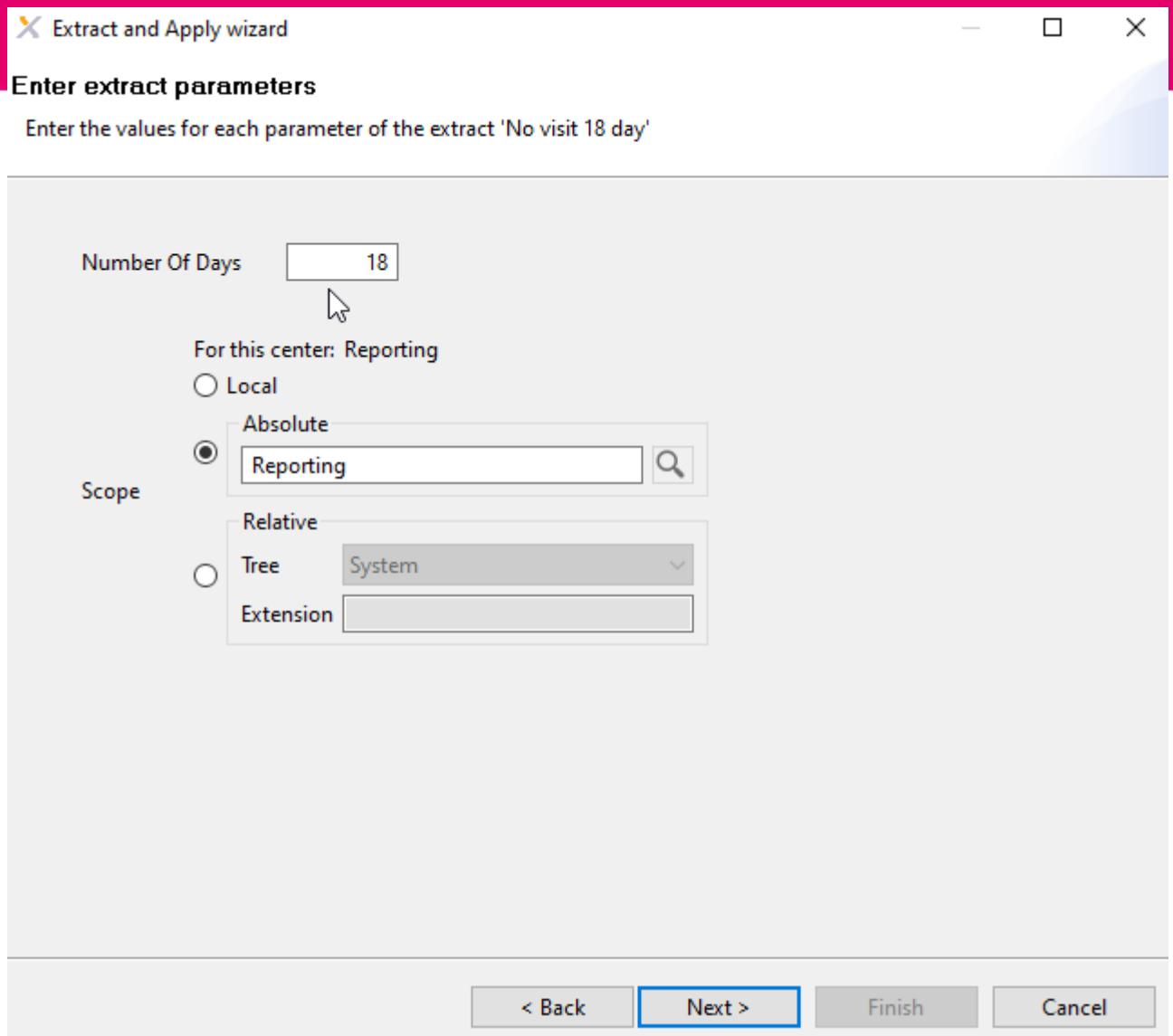
18-Day Non-Attendance Report

The 18-day non-attendance report has been set up to be sent to the default club email address each night. The report comes through as an excel spreadsheet attachment and will give you a list of members that haven't recorded a visit in Exerp in the last 18 days. Please see an example below.

First Name	Surname	External ID (Membership	Last Visit Date	Days Since Last Visit	Mobile Number	Home Phone	Subscription Name
Laura	Mattiazz	FM99-15795	2020-02-07	18	+61410764431		12 Month Ongoing
Venietia	Ratnarajah	FM99-15019	2020-02-07	18	+61431066621		12 Month Ongoing
Hafsa	Mohamed	FM99-14857	2020-02-07	18	+61432512885		18 Month Ongoing
Entsar	Raju	FM99-15752	2020-02-07	18	+61402247949		12 Month Ongoing

You can also access this report in Exerp via the Reports App if you would like to see members that haven't visted the club within a custom day range. For e.g. if you would like to see all members that haven't been ot the club in the last 30 days you can review this in Exerp as well.

Reports App > Extract Wizard > Select 18 Day No Visit Report > Enter the number of days in the window below



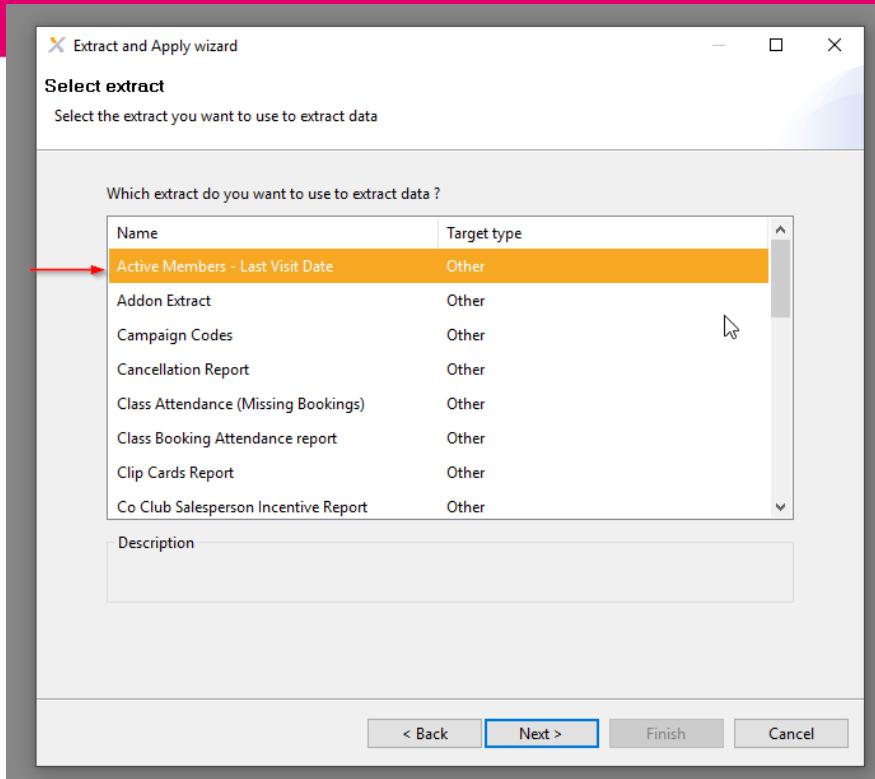
Active Members – Last Visit Date Report

The Active Members – Last Visit Date Report will allow you to pull a report on all active members that have recorded a visit in the club within a certain range. You can customise the date range to be the last 30 days, everyone who visited in August or everyone who has visited the club since that start of the year.

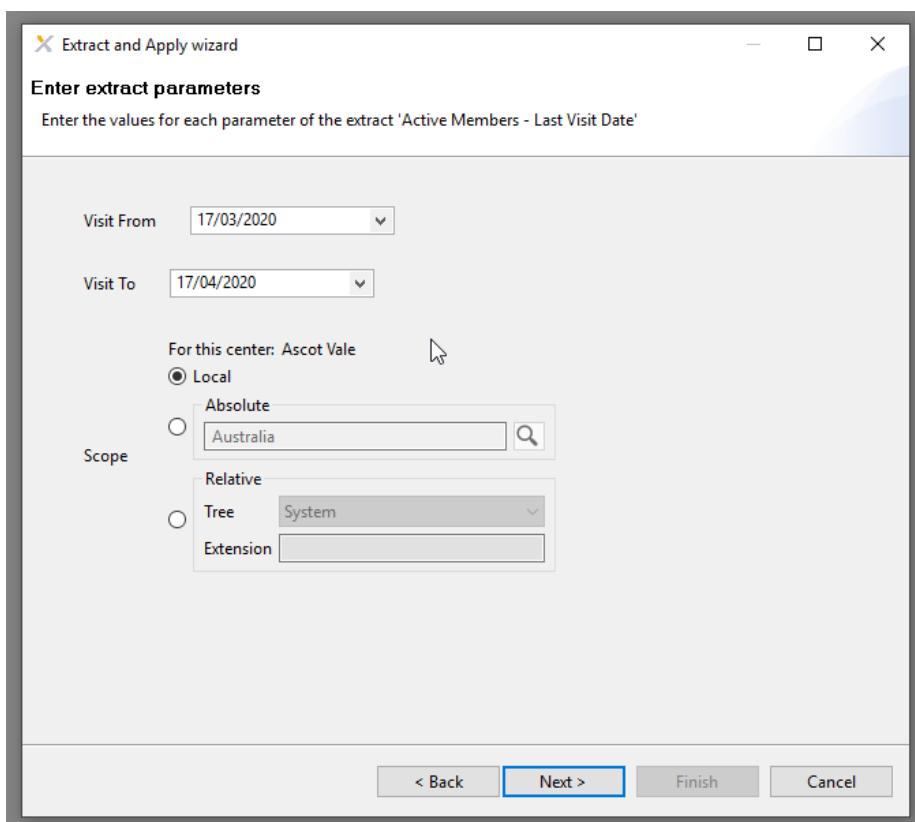
Reports App > Extract Wizard > Franchisee > Active Members – Last Visit Date Report > Select your date range > Next > Export to Excel.

1. In Exerp go to the Reports App
2. Select the Extract Wizard in the bottom left corner
3. A new screen will pop up > Select Franchisee > Select Next

4. Select the Active Members – Last Visit Date > Select Next



5. Choose your date range > it will default to your club, however check the scope if you own multiple clubs.



6. Select Next and will export the data. Right click on the table and export to excel.

Addon Extract Report

The Addon Extract Report is the report you will pull to view all of your members that have a current subscription add-on i.e. FIIT30 Flexi. You may want to see all your members that are on unlimited FIIT30 or unlimited Reformer Pilates – this is the report you will need to pull.

Reports App > Extract Wizard > Franchisee > Addon Extract Report > Choose Scope > Next > Export to Excel.

1. In Exerp go to the Reports App
2. Select the Extract Wizard in the bottom left corner
3. A new screen will pop up > Select Franchisee > Select Next
4. Select the Addon Extract > Select Next
5. Choose your scope it will default to your club, however check the scope if you own multiple clubs.
6. Select Next and will export the data. Right click on the table and export to excel.

Finished extracting data (42 results found)				
PersonID	Addon Name	Start Date	End Date	Status
301p1627	FIIT30 Flexi	21/11/2019	12/03/2020	Active
301p1772	FIIT30 Flexi	25/04/2019		Active
301p1898	FIIT30 Flexi	21/11/2019		Active
301p1958	FIIT30 Flexi	9/05/2019		Active
301p1972	FIIT30 Flexi	29/01/2020		Active
301p2030	FIIT30 Flexi	2/01/2020		Active
301p2037	FIIT30 Flexi	28/11/2019		Active
301p2263	FIIT30 Flexi	9/05/2019		Active
301p2289	FIIT30 Flexi	27/02/2020		Active

Clip Cards Report

The Clip Cards Report is the report you will pull to view all of your members that have any clip cards available, including recurring clip card. You may want to see all your members that have Personal Training sessions on their account – you would pull the Clip Cards Report and then filter in excel to just display PT.

Reports App > Extract Wizard > Franchisee > Clip Cards Report > Select date range and choose Scope > Next > Export to Excel.

1. In Exerp go to the Reports App

2. Select the Extract Wizard in the bottom left corner
3. A new screen will pop up > Select Franchisee > Select Next
4. Select the Clip Cards Report > Select Next
5. Select your date range and choose your scope it will default to your club, however check the scope if you own multiple clubs.
6. Select Next and will export the data. Right click on the table and export to excel.

QLIK Reports

QLIK is our reporting platform where you can access and view the Sales Performance Report, Marketing Performance Report and **confirm OPS and P&L**. Based on your access levels in Exerp will depend on what reports you will be able to see and access.

Qlik is built for the capacity to be touch screen, if needed.

[Logging into QLIK](#)

You can access the QLIK platform via this link <https://fernwood.exerp.com/dist/qlik>

When you see the screen below, you can log in with your Exerp log in details i.e. 100emp206 and password.



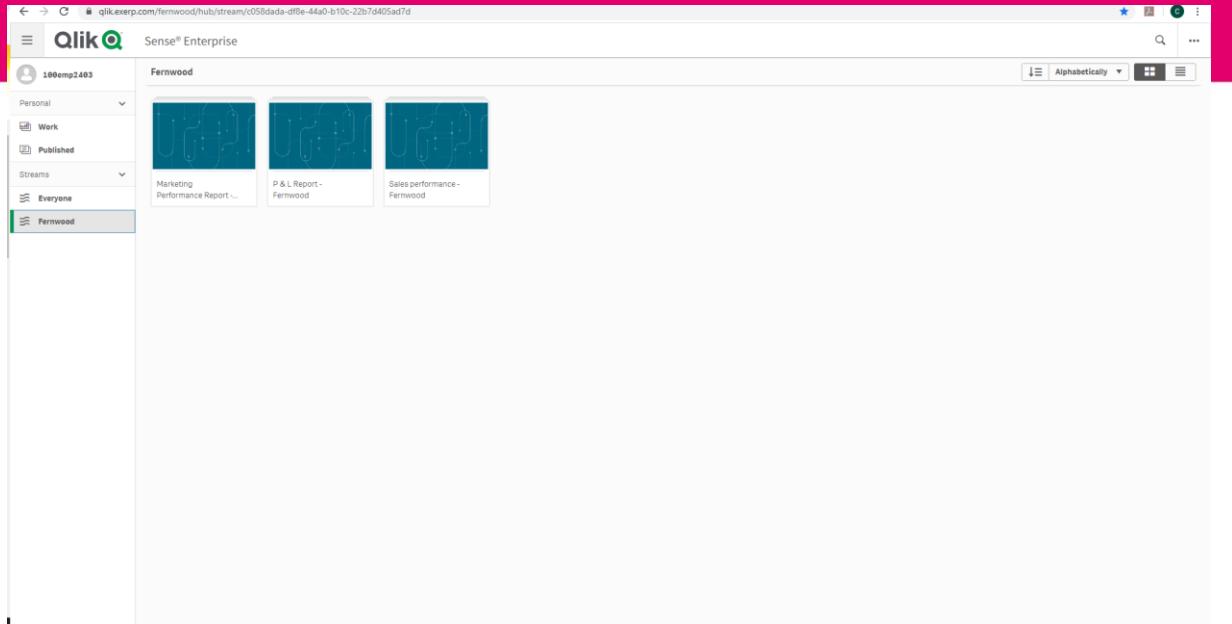
Business Intelligence

 A screenshot of a login interface. At the top, the "exerp" logo is visible. Below it, the words "Business Intelligence" are centered in a dark, bold font. Underneath this, there are two input fields: "Username" containing "100emp206" and "Password" containing several dots. Below the password field is a "Login" button with blue text.

Once logged in, ensure you click on Fernwood on the left hand side to see the 3 Fernwood Hub reports.

You will then be able to access the following 3 hubs:

1. Marketing Performance
2. P and L Report
3. Sales Performance



It is important to note that whilst Qlik uses relatively live data, it is not immediate. The system updates hourly.

Filters

Scope

Please note: if you are franchisee that owns multiple clubs, in QLIK you will be able to search via your entire scope of clubs, or drill down further to just 1 or 2 of these clubs.

Date Range

All reports can be filtered by month (MTD), by year (YTD) or by free select (FREE_SELECT). Free select allows you to pull a range of months as chosen in your filters, Eg – you may choose a quarter, half a year or a specific month range applicable what you are looking for.

Sales Performance Reports

The Sales performance Report will give you access to 3 Key reports:

Sales KPI Details

This will give you a daily snapshot of what is happening in your club day by day by measuring your standard sales KPI's.

Sales KPI dashboard



This is your standard dashboard that will show you where your club is at month to date in the key performance areas.

Sales KPI staff

This will allow you to pull individual KPI's per staff member in your club.

All reports can be filtered by month, by year or by free select. Free select allows you to pull a range of months as chosen in your filters, E.g. – you may choose a quarter, half a year or a specific month range applicable what you are looking for.

Selections

The selections section of the reporting will allow you to filter your reports by any individual category or measure you wish to report on.

Marketing Performance will allow you to check 3 reports

1. Campaign Performance
2. Club Performance
3. Performance Overview

Profit and Loss Reports

1. Legacy P&L
2. Profit and Loss YTD

Pro.Mywellness

Staff Profiles

Pro.mywellness > Staff > Staff Members

Staff profiles for Personal Trainers will be visible to their clients via the Fernwood App, so that when a member is booking an appointment with them they can see their name, photo (so they can recognise their trainer in the club) and a small biography about the trainer. This can include their qualifications and certificates or what they love most about being a PT.

Edit your staff profile

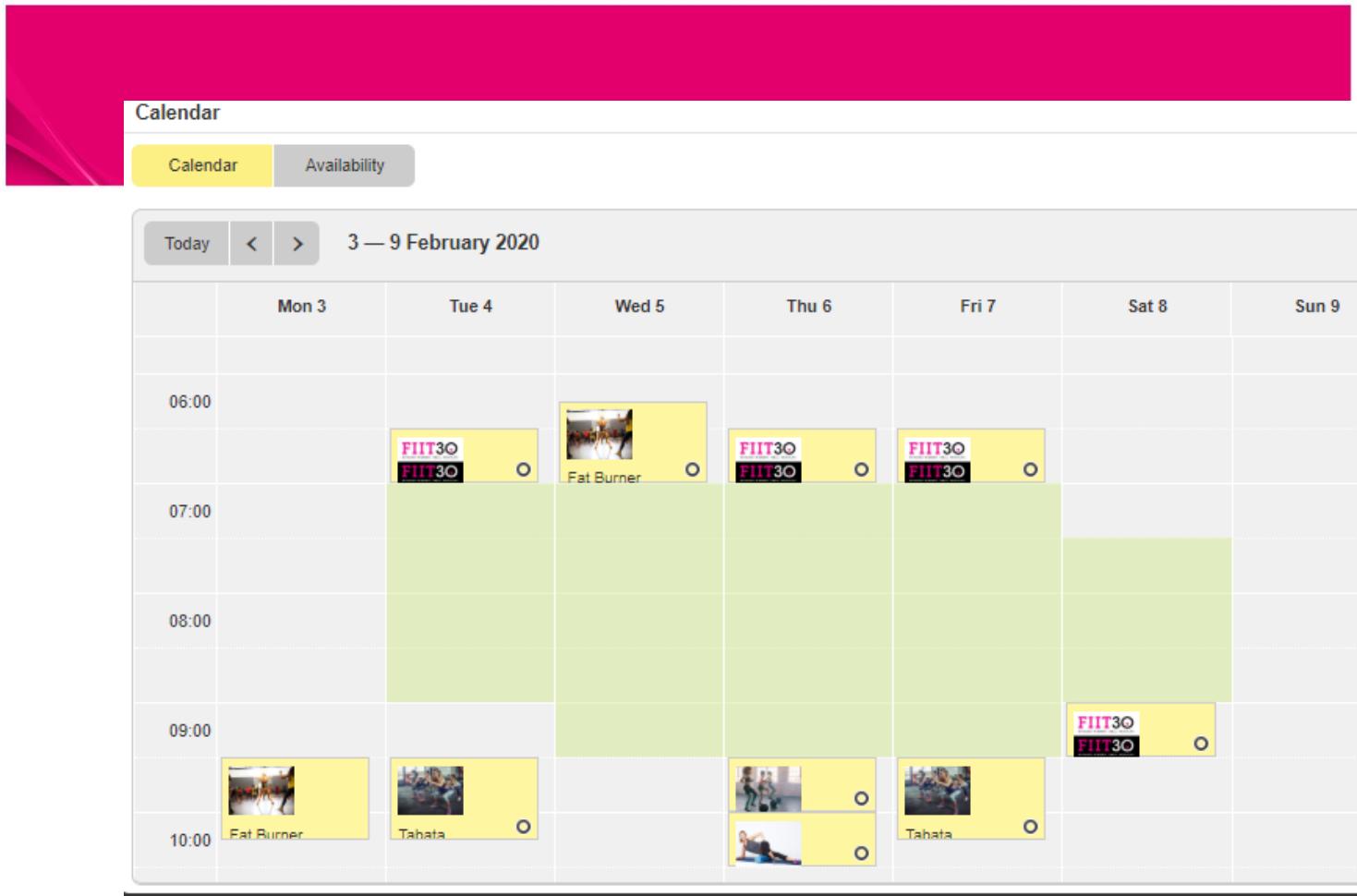
Pro.mywellness > Staff > Staff Members > Find your profile > Select Public Profile  > Edit/Add any information

The screenshot shows the 'Staff' section of the mywellness platform. At the top, there's a navigation bar with a cloud icon, the text 'mywellness', and 'Staff'. Below this, a user profile for 'Day Tahlia' is displayed, featuring a small thumbnail photo and three icons for 'Profile', 'Calendar', and 'Skills'. The main area shows a large placeholder for a profile picture, labeled 'Picture', with a silhouette of a running person. To the right of this are sections for 'Skills' (with an 'Add' button and note 'No skill set.'), 'Certifications and courses' (with an 'Add' button and note 'No certification or course set.'), and 'Picture gallery' (with an 'Add' button, note 'Supported formats jpg, png', and 'Suggested size 1125 x 750', and a message 'No picture present.'). Below the picture area are fields for 'Motto' (an empty text input box) and 'Biography' (an empty text input box).

View your schedule

Pro.mywellness > Staff > Staff Members > Find your profile > Select Calendar 

This will give trainers the ability to view **week by week** their activity in the club. It will show any classes they are teaching, Fitness Coach shifts and Personal Training times.



Managing Calendars – Personal Training & Fitness Coach

Open up a working time

Pro.mywellness > Staff Profile > Calendar View > Availability > New

New staff availability

Staff member	<input type="text"/>				
Role	<input type="text"/>				
Who can book	<input type="text"/>				
Start time	<input type="text"/> 17:00	End time	<input type="text"/> 21:00		
Days of week	<input type="checkbox"/> Monday	<input type="checkbox"/> Tuesday	<input type="checkbox"/> Wednesday	<input type="checkbox"/> Thursday	
	<input type="checkbox"/> Friday	<input checked="" type="checkbox"/> Saturday	<input type="checkbox"/> Sunday		
Start date	<input type="text"/> 01/02/2020	<input type="button"/>	End date	<input type="text"/> 30/07/2020	<input type="button"/>
OK					

1. Select your staff member
2. Select your role i.e. Personal Trainer OR Fitness Instructor (Fitness Coach)
3. Who can book – Leave this as All Staff and Members so that members can book via the Fernwood App
4. Select Start and End time of the shift
5. Select any days this shift time applies to
6. Select end date of this shift. If this a once off shift be sure to select the date as both the start and end date.
7. Select OK

[Edit/Remove a shift](#)

Pro.mywellness > Planner > Staff Availability > Find the shift > Select > Edit

The screenshot shows a modal dialog titled "Edit staff availability". Inside the dialog, there are several input fields and dropdown menus:

- Staff member:** Florio Rosana
- Role:** Personal Trainer
- Who can book:** All staff and members
- Start time:** 06:00
- End time:** 11:00
- Date:** 05/02/2020
- Calendar icon:** A small calendar icon is located next to the Date field.

At the bottom of the dialog, there are two buttons: "Delete" on the left and "OK" on the right.

1. Select the shift you want to edit
2. Choose either the entire series or just this one
3. TO EDIT: Adjust the time and date
TO REMOVE: Select Delete

[Booking in a member](#)

Pro.mywellness > Planner > Staff Planner



In Staff Planner you can view and book trainers and instructors from a **day to day** view. Use the filters in the top right hand side to search via role, staff member or class (or use two or three).

Once you've found the day you wish to book the member in for, you can easily view the trainers availabilities by any of the green squares. All spots that have been taken will show as a different colour.

New task

Task	<input type="text" value="Appointment"/>
Contact	<input type="text" value="Type to search contact"/>
Staff member	<input type="text" value="Minton Sarah"/>
Status	<input checked="" type="radio"/> To do <input type="radio"/> Done
Due date	<input type="text" value="04/02/2020"/> Time 07:30 - 08:00
05:00 06:00 07:00 08:00 09:00 10:00	
<input type="checkbox"/> Share and send a reminder to the contact	
Enter the notes that will be shared to the contact	
More details Save	

1. Click on the available spot with the preferred trainer
2. Select Task type
Available options: Personal Training 30mins, Personal Training 60mins, Break, Complimentary Training Session, Contact, Phone Call
3. Search for your member
4. Staff member will be pre-selected
5. Status: Any future appointments will be listed as To-Do, once a member signs in to the club and is marked as attended the appointment will be marked as Done
6. Confirm date and time of the session

7. **Optional:** Share a message to the member

If you would like to send any additional notes to the member about their appointment, please check this box and type in the message. For e.g. *Hi Mary, please remember to pay for your next session at the reception desk.*

8. **More details:** Trainers can add in any notes

about the upcoming session.

9. **SAVE**

[More details](#) ▾

Instructions

Enter the instructions on how to do the task

Notes

Enter notes about how you did the task

Save

Edit/reschedule a session

Pro.mywellness > Planner > Staff Planner > Search for session > Edit

The screenshot shows a staff planner interface for a gym. On the left, there's a sidebar with 'New task', 'Staff planner', 'Staff availability', 'Class booking', and 'Class scheduling'. The main area is a calendar for Thursday, 30 January, 2020, from 05:00 to 21:00. A yellow square at 13:00 is highlighted. A tooltip for this square shows a profile picture of 'Minton Sarah Personal Trainer' and an 'Appointment Day Tahlia' from 13:00 to 13:30. There's also an 'Edit' button.

To view which member is booked in to the session, hover your mouse over the yellow square and it will load the member. This is also a short cut to Edit/Cancel the session.

The screenshot shows an 'Edit task' dialog box. It has tabs for 'Task' and 'Appointment'. Under 'Task', there's a contact photo of 'Day Tahlia'. Under 'Appointment', there's a staff member dropdown set to 'Minton Sarah', a status radio button set to 'To do', and a due date of '30/01/2020'. The time is set to 13:00. A note says 'Please bring a towel'. At the bottom, there are 'Delete' and 'Save' buttons.

1. Find the session you need to reschedule, hover your mouse over the square and select Edit.
2. Adjust the date and/or time of the session as required.
3. Click SAVE.

Cancel a session

Cancel a session

Edit task

Task Appointment

Contact  Day Tahlia

Staff member Minton Sarah

Status To do Done

Due date 30/01/2020 Time -

11:00 12:00 13:00 14:00 15:00

Share and send a reminder to the contact

Please bring a towel

[More details](#)

[Delete](#) [Save](#)

1. Find the session you need to reschedule, hover your mouse over the square and select Edit.
2. Select Delete

The cancellation policy and booking rules are set in Exerp and will flow through to the appointments set up in pro.mywellness. For e.g. a PT session that is removed within the 12 hours prior to the session time, the member will automatically forfeit the session.

Members will be unable to cancel their session via the Fernwood App in the 12 hour window before the session start time. They will be prompted to call the club to cancel.

PLEASE NOTE: all of the above functions are able to be completed in the Staff Profile section of pro.mywellness as well as managed by Personal Trainers at home via the MWPro App.

How to assign a break in your calendar

To book in a break in your personal training calendar, simply find the time in your shift you need to block out for a break > Select BREAK as your task and this will block your calendar out for 30 minutes.

You will need to assign yourself (as a staff member) to the appointment, which will then allow you save.

The screenshot shows the 'Edit task' interface. At the top, there are tabs for 'Task' and 'Break'. Below the tabs, under 'Contact', is a profile picture of Jaymee Stone. Under 'Staff member', it says 'Jaymee Stone'. The 'Status' section has a radio button for 'To do' (which is selected) and one for 'Done'. The 'Due date' section shows a date picker set to 10/02/2020 and a time picker set to 19:00. A color-coded timeline below shows a yellow block from 19:00 to 19:30. There is also a checkbox for 'Share and send a reminder to the contact' and a text area for notes. At the bottom, there are 'More details' and 'Delete' buttons, and a blue 'Save' button on the right.

Tasks

Any outstanding tasks assigned to a staff member will come up on the home page dashboard of pro.mywellness when a member signs in.

This will display any tasks that the staff member needs to action – whether it be marking off a complimentary personal training session or actioning a follow up phone call.

It will give the staff a quick overview of all their outstanding tasks. This can also be viewed and marked off in the Staff App.

The dashboard has three main sections:

- YOUR HIGH RISK ACTIVE CLIENTS:** Shows 0 active clients assigned to the user at high risk of leaving. Includes a 'Contact clients' button.
- TASKS:** Shows 1 task to do today: 'Complimentary Training Session Threadgold Amie' scheduled from 4:00 PM to 4:30 PM. There is a 'Done' checkbox next to it. Includes a 'Show details' button.
- LEADS TO MANAGE:** Shows 1 lead to manage. Includes a 'Show details' button.

At the bottom left, there is a 'SEARCH CONTACTS' bar with a magnifying glass icon and a placeholder 'Search clients, prospects, leads...'. There is also a small 'Filter' icon.

Assign a Member to a Staff Member

For Personal Trainers to keep up to date with their client base, we recommend using pro.mywellness to assign your PT clients to their trainers. This make it easy for the trainers to search for their clients in pro.mywellness and send out communications if required.

(INCLUDE SCREENSHOTS)

Staff App – Mywellness for Professionals

For Personal Trainers to view and book clients into the calendar easily from home and in the club they can do this all via the Mywellness for Professionals Staff App. Simply download from the App Store and log in using their existing credentials. This will automatically link them to their club and calendar.

View any outstanding tasks

On the home page of the app, staff can view, add and action any tasks that are allocated to them. A task is a useful prompt for staff to create their own follow ups. For example, ‘Follow up Mary Smith on her complimentary PT session’.

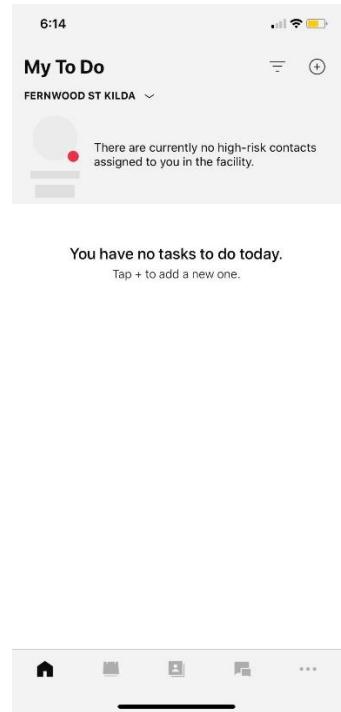
View & Manage the Calendar

In the calendar icon for the staff app, trainers can view and manage their working times as well as reschedule, cancel and book clients in.

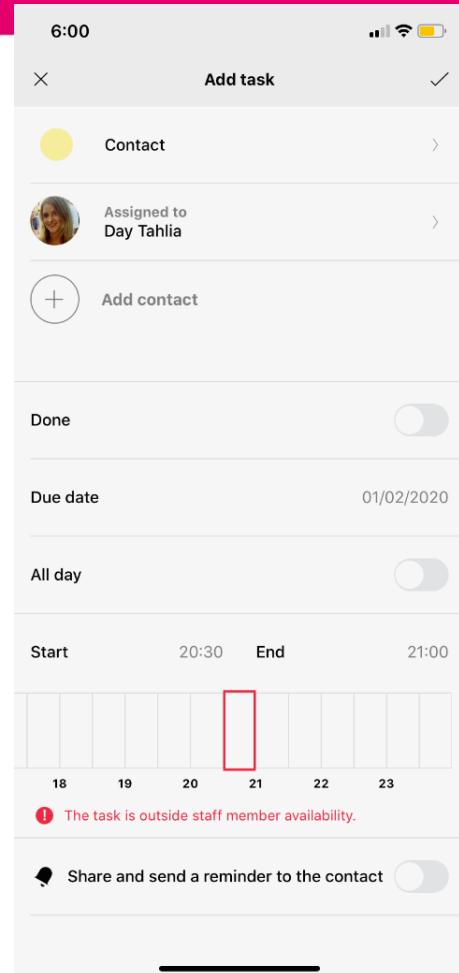
This allows trainers to view their shifts any time, any where, without having to contact the club directly.

Click on the calendar icon in the app, search by the day to view and book in your clients.

- Either tap on the time in the calendar or tap the + icon in the top right hand side of the screen to add in a client.



- Trainers will be prompted to enter the same information as they would if they were booking via the pro.mywellness platform.



See who is in the club

Add screenshots in here

Fernwood App 2.0

Notifications to members for classes and appointments

- Members that book into a class, they will receive a push notification the day before, and one hour before the class (include screenshot of appointment)
- Attendance will be marked off automatically if they swipe into the club at reception within a 2 hour window before the start time of their session or class
- Booking window – within the 12 hours for PT it will stop them from making any changes to their sessions via the app and will prompt them to contact the club directly.

Waitlist function

Book a Personal Training session via the App

Fernwood App > Book a service > Personal Training > Select Trainer > Select time of session > Confirm booking

(Include screenshots from Diego's slide)

Purchasing PT via the App

If a member has no PT sessions (clip cards) and they go to book a Personal Training session via the app, they will be prompted to purchase a pack before they can book a session in.

(Add screenshots from Diego's slides)

Managing Penalties for Classes

Scheduling Classes in pro.mywellness

Pro.mywellness > Planner > Class Scheduling

1. Go to the Planner tab > Class Scheduling tab > New
2. Choose the class you wish to schedule from the drop down selection
3. Choose the room that the class will take place in from the drop down selection

PLEASE NOTE: Any classes that have been deleted in pro.mywellness, before you schedule a class in the same time spot, ensure you wait at least 60 second. This is to ensure pro.mywellness and Exerp are talking to each other and the class is set up correctly.

Exerp Hardware Installation Instructions

Step Over Signature Pad

Requirements

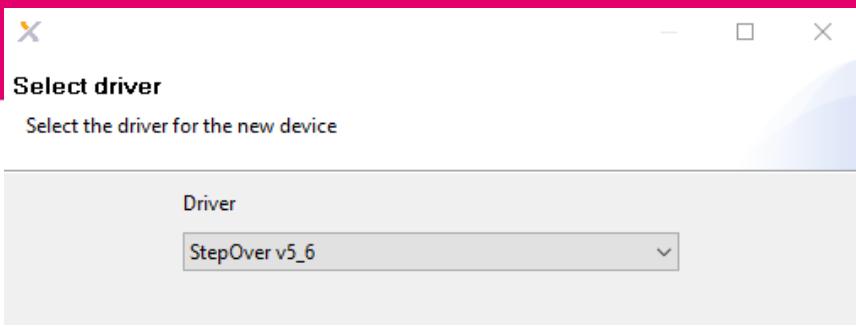
- Step over Signature pad
- Spare USB port for the Billiance color
- 32-bit java installation of Exerp

Note

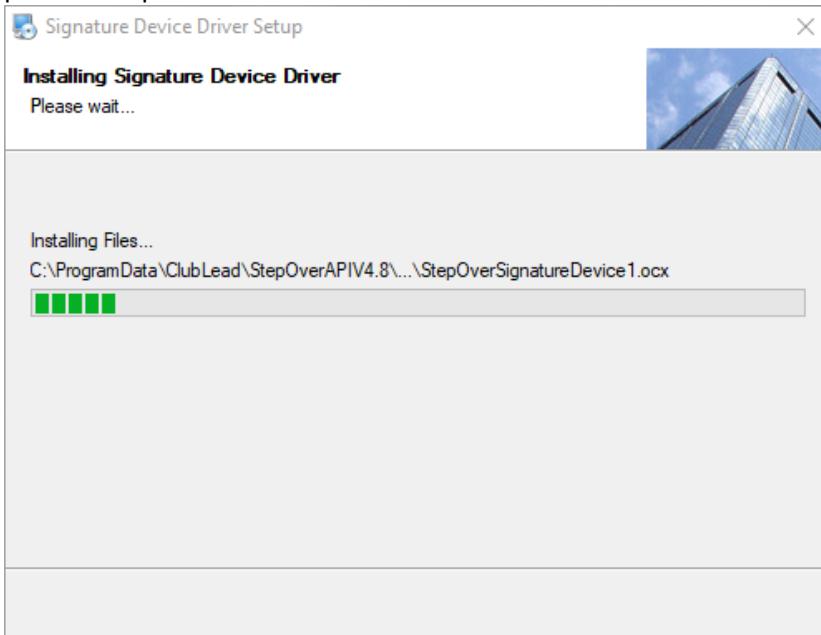
Step Over currently only has 32-bit drivers which is why the Java version of Exerp needs to be installed on the PC. For instructions on how to install the Java version of Exerp, please refer to the training manual.

Installation

1. Plug the signature pad into the PC
2. Open Exerp and login
3. Go to Menu → Client
4. Select 'Devices'
5. Click 'Add'
6. Select 'StepOver v5_6' from the drop[down menu



- 7.
8. Select Next → Next → Finish
9. The driver installation files for the signature pad will start automatically, allow them to install. You may also be prompted to install .net 3.5 framework if it is not already installed, please accept this installation also.



- 10.
11. Once finished, close Exerp
12. Open Exerp and login
13. Go to Menu → Client
14. Select Devices
15. The 'StepOver v5_6' should appear in the list with 2 Green ticks, select it and in the 'Log' Window you should see 2 informational entries saying the device has initiated and started successfully

A screenshot of a software interface for managing devices. At the top, there's a table with columns "Name" and "Driver". One row is highlighted in orange, showing "stepoverv5_6" in the Name column and "StepOver v5_6" in the Driver column. Below the table are "Add" and "Remove" buttons. At the bottom, there are tabs for "Log" and "Configuration", with "Log" currently selected. The log table shows two entries: "Device initialized successfully" and "Device started successfully", both timestamped at 5/02/2020 3:46 PM.

- 16.
17. If you are using the Step Over Brilliance Color, you should see the Fernwood logo appear on the screen

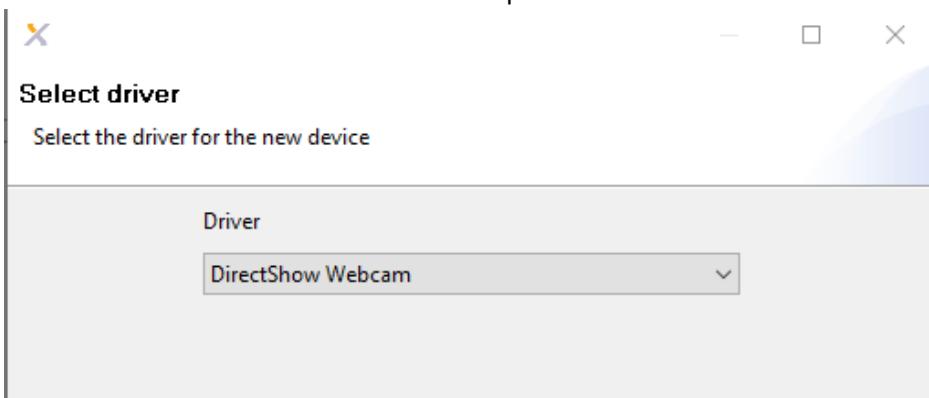
Webcam Installation

Requirements

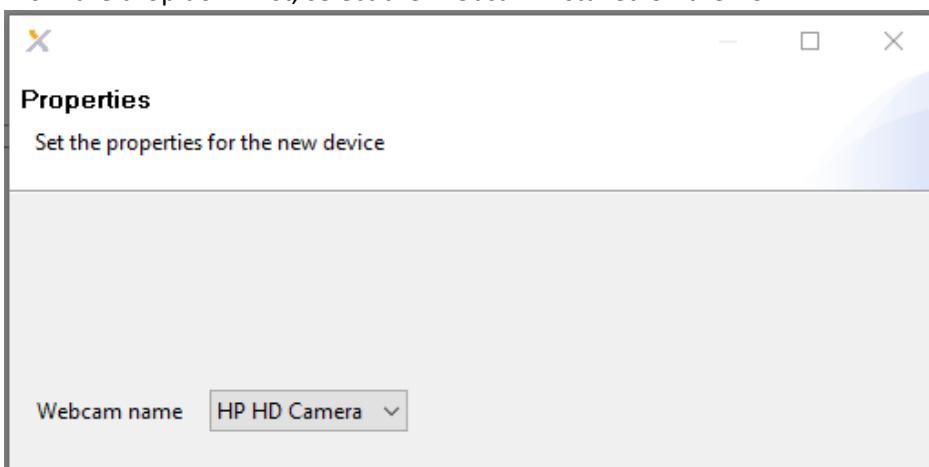
- USB Webcam or Internal webcam if using a laptop
- Spare USB port

Installation

1. Open Exerp
2. Go to Menu → Client
3. Click on Devices
4. Click Add
5. Select 'DirectShow Webcam' from the drop down list



- 6.
7. Click Next
8. From the drop down list, select the Webcam installed on the PC



- 9.
10. Click Next → Finish
11. Close down Exerp and open it up again
12. Log in and go back to Menu → Client → Devices
13. The 'DirectShow Webcam' should appear in the list with 2 Green ticks, select it and in the 'Log' Window you should see 2 informational entries saying the device has initiated and started successfully

The screenshot shows a software application window with a tab bar at the top. The tabs are labeled Info, Properties, Editors, Devices, and Log. The Devices tab is currently selected, highlighted in orange. Below the tabs, there is a table with three columns: Name, Driver, and Enabled. A single row is visible, showing 'directshowwebcam' in the Name column, 'DirectShow Webcam' in the Driver column, and a checked 'Enabled' checkbox. At the bottom of this section are 'Add' and 'Remove' buttons. To the right of the table is a small 'Enable' button with a checkmark icon. Below the table, there are two tabs: Log (which is selected and highlighted in orange) and Configuration. The Log tab displays a log table with three columns: Time, Description, and Data. Two log entries are present: 'Device initialized successfully' at 5/02/2020 4:23 PM and 'Device started successfully' at 5/02/2020 4:23 PM. Both entries have an information icon (a blue circle with a white question mark).

Name	Driver	Enabled
directshowwebcam	DirectShow Webcam	<input checked="" type="checkbox"/>

Add Remove

Enable

Time	Description	Data
5/02/2020 4:23 PM	Device initialized successfully	
5/02/2020 4:23 PM	Device started successfully	

Log Configuration

14.

Posiflex MSR Driver Installation

This guide shows the necessary steps to install the Posiflex MR-2200U-3-B in to Exerp.

Requirements

- Posiflex MR-2200U-3-B
- Spare USB port
- Posiflex software

1. Go to http://www.posiflex.com/en-global/Download/index/driver/MR/MR-2106_MR-2200
 2. From the drop down menu select “Drivers & Utility”
 3. Download:
 1. MR-2XXX Series MSR Manager Utility for USB interface Magnetic Stripe Card Reader
 2. MR-2XXX Series USB Virtual Com Port Driver for
WinXP/Win7/Win8/Win10_32Bit/64Bit
 4. Extract the files
- WinRar installed as the files are in .rar format www.winrar.com

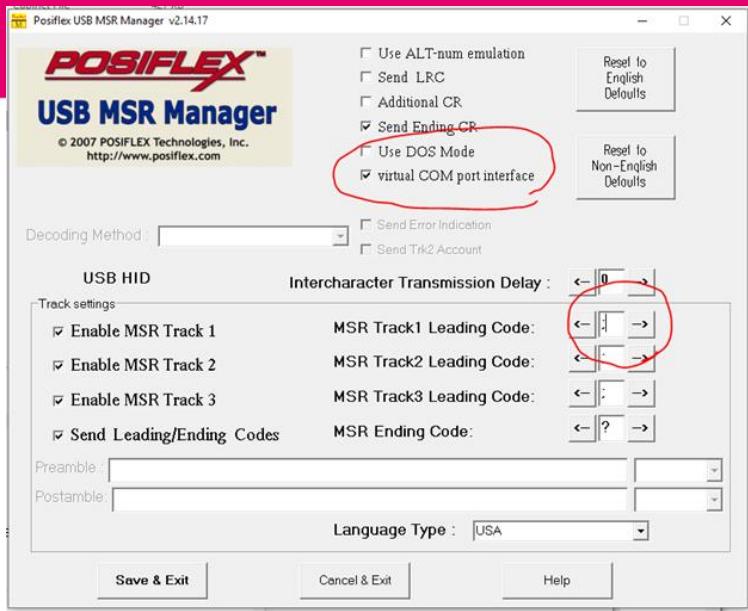
Note

You cannot have Exerp and the MSR Manager Utility open at the same time due to each programme locking the COM port in Windows

Installation

Configure the device for Exerp

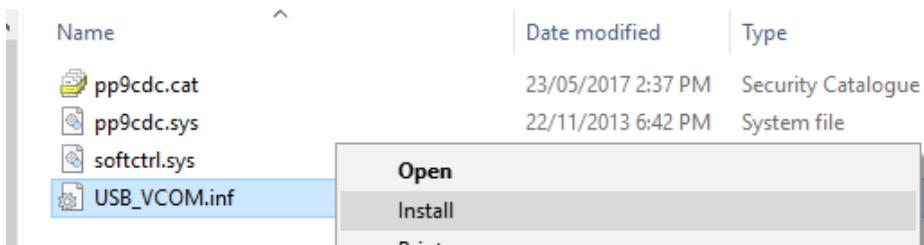
1. Go to the MSR Manager Utility folder and run Setup.exe and accept all defaults
2. Plug the Card Reader into the PC
3. Run Posiflex USB MSR Manager
4. Make the following configuration changes:
 1. Tick the virtual COM port interface
 2. Change the MSR Track1 Leading Code from % to ; (**semi colon**)
 3. Save & Exit



5.

Set up the device as a COM port

1. Go to the USB Virtual Com Port Driver folder
2. Select the folder which represents the operating systems architecture (most Windows operating systems now are 64-bit)
3. Right click **USB_VCOM.inf** and from the drop down list click 'Install'



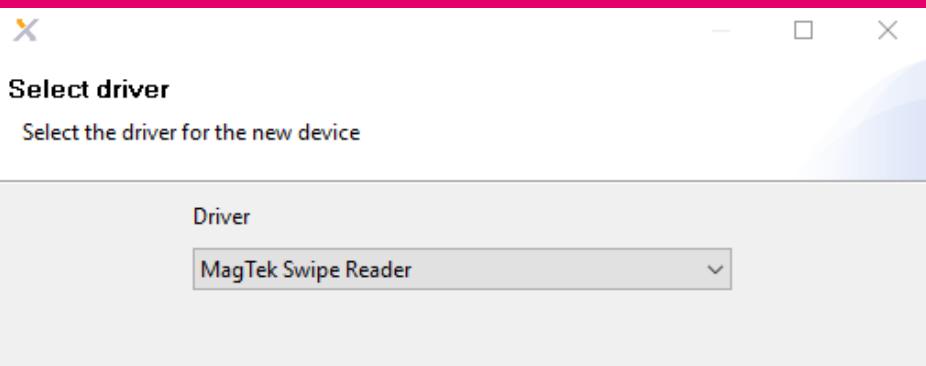
- 4.
5. If any security Windows pop up, accept and install
6. Go to 'Device Manager' and check that a new port has been added in 'Ports (COM & LPT)' called Posiflex USB MSR (COM4)

 - > Network adapters
 - < Ports (COM & LPT)
 - Posiflex USB MSR (COM4)
 - > Print queues

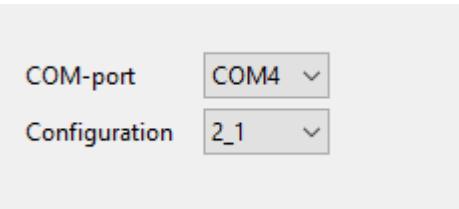
- 7.
8. Take a note of the COM port number

Set up Exerp

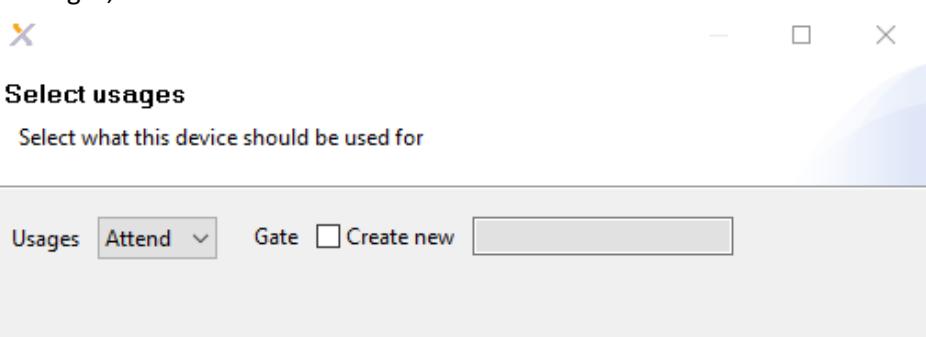
1. Open Exerp
2. Go to Menu → Client
3. Click on Devices
4. Click Add
5. Select 'MagTek Swipe Reader'



- 6.
7. Select the COM port noted earlier



- 8.
9. Select Next → Next
10. In Usages, select 'Attend'



- 11.
12. Click Finish
13. Please note that there is some additional configuration that is required after this which needs to be done by IT. Please send a request to helpdesk@fernwoodfitness.com.au for this to be completed
14. Close down Exerp and open it up again
15. Log in and go back to Menu → Client → Devices
16. The 'MagTek Swipe Reader' should appear in the list with 2 Green ticks, select it and in the 'Log' Window you should see 2 informational entries saying the device has initiated and started successfully

Name	Driver	Enabled
magtekswipereader	MagTek Swipe Reader	✓

Buttons: Add (+), Remove (-)

Log Configuration

Time	Description	Data
5/02/2020 9:39 AM	Device initialized successfully	
5/02/2020 9:39 AM	Device started successfully	

- 17.
18. Go back to the front desk in Exerp and swipe a member's card to see if it records a visit

RFID HID Omnikey reader

This guide shows how to set up the RFID reader into Exerp. The hardware is required to log member visits at reception via the fobs and to assign fobs to members. 2 readers are required per club as the readers are not able to do both jobs. It is advised that the readers are labelled so that the role of them can be easily identified and that they are plugged into separate PC's.

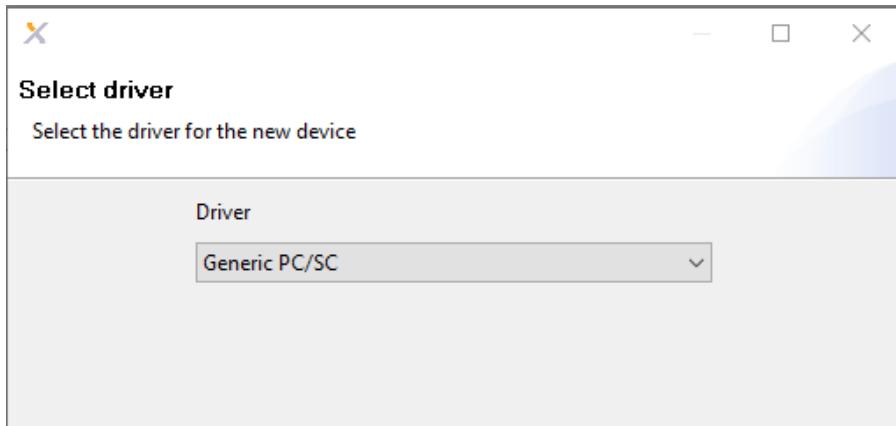
The RFID reader that is used to log member visits should be connected to a reception PC and it is recommended that the RFID reader that is used to allocate fobs to members should also be a reception PC but if there is only 1 PC at reception then the franchisee\manager should use their discretion when selecting a suitable PC.

Requirements

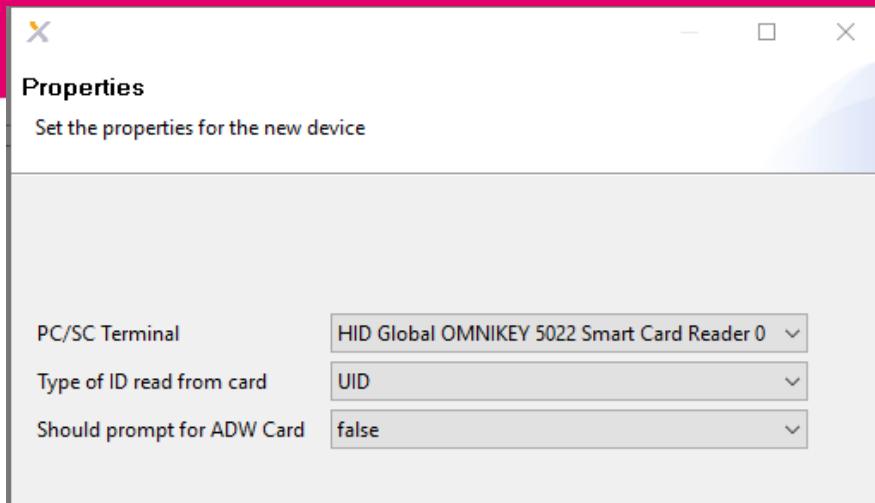
- 2 x RFID HID Omnikey readers
- 2 x PC's with a spare USB port

Set up Exerp

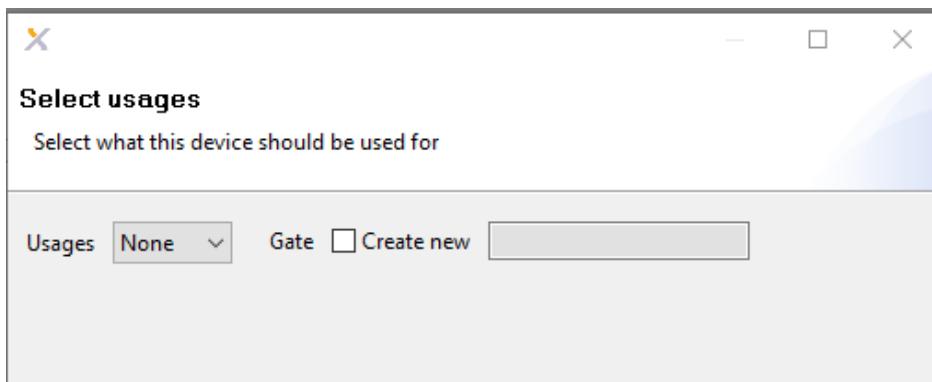
1. Plug the reader into your PC
2. Open Exerp
3. Go to Menu → Client
4. Click on the Devices tab
5. Click Add
6. Select 'Generic PC/SC' from the drop down menu



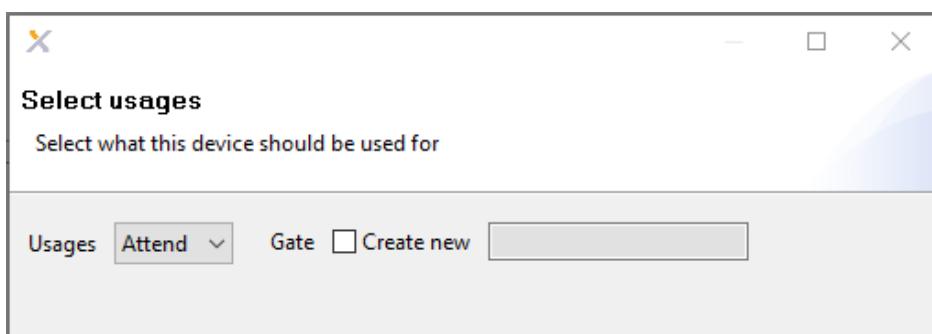
7. Select 'HID Global OMNIKEY 5022 Smart Card Reader 0' from the drop down menu



8. Click Next and Next again
9. For the PC that will use the RFID reader for allocating fobs to members select 'None' in Usages



10. For the PC that will use the RFID reader for registering member visits select 'Attend' in Usages



11. Click 'Finish'
12. Close down Exerp
13. Open Exerp
14. Go to Menu → Client
15. Click on the Devices tab
16. The 'Generic PC/SC' should appear in the list with 2 Green ticks, select it and in the 'Log' Window you should see 2 informational entries saying the device has initiated and started successfully

Name	Driver	Enabled
gantnerg7accesscontrol	Gantner G7 Access Control	✓
genericpc/sc	Generic PO/SC	✓

Time	Description	Data
6/03/2020 3:27 PM	Device initialized successfully	
6/03/2020 3:27 PM	Device started successfully	

Exerp Hardware Requirements

Computers – minimum requirements (recommended)

- Operating system – Windows 8.1, Windows 10 64-bit (recommended)
- Processor – i3, i5 (recommended)
- Memory – 4GB, 8GB (recommended)
- Disk – 160GB, 240GB SSD (recommended)

PLEASE NOTE: Windows 7 is no longer supported by Microsoft and there are also compatibility issues with running Exerp so clubs must replace\upgrade any Windows 7 PC's they currently have.

Exerp does not run on a Mac operating system. If you are running Windows on Parrallels or something similar on a Mac then this should work. Support for this is limited and you should seek further advice from your local IT Tech.

Software

Java version – the 32-bit version of Java needs to be installed and can be downloaded at <http://java.com>

Installer version – this only runs on 64-bit operating systems. Most computers with Windows 10 will be 64-bit by default.

Exerp will be moving away from the Java install in the future so clubs must ensure that their PC's are 64-bit.

Printers

For printing contracts, your existing network printer should be compatible.

We will not be printing receipts through Exerp so a receipt printer will not be required.

Cameras

Most modern USB cameras will work with Exerp, we recommend using a Logitech WebCam that can be attached to your reception monitor. If you are using a Windows laptop or tablet with an inbuilt camera, this should also work but will need to be tested for compatibility.

Signature Pads

For digital sign ups a signature pad from Step Over is required. There are 3 to choose from:

- Durasign 10" Signature Pad
- Billiance and Color

- NauraSign Mobile

Tablets

IPads and Android tablets are not supported but can still be used in club for other functions e.g. Pro.mywellness and remote PT bookings via mywellness.

