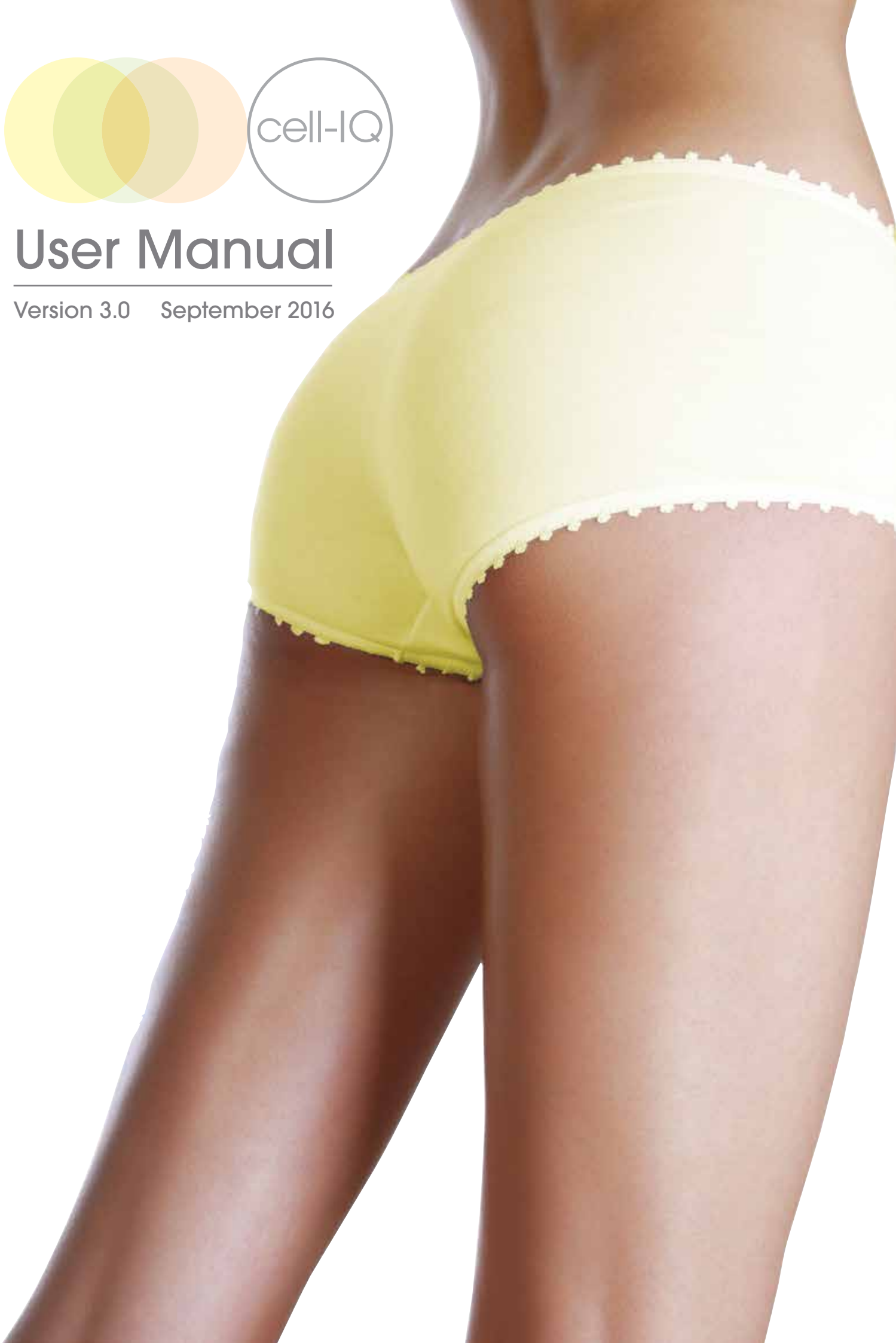


User Manual

Version 3.0 September 2016



Document history



Date	Version	Description
April 1, 2011	1.0	Initial Release
May 16, 2011	1.1	Updated to include use of "Cell IQ Outstanding Balance" product as well to help with reconciliations.
May 24, 2011	1.2	Updated "Signing Up A Client" section
June 2, 2011	1.3	Updated "Signing Up A Client" section to clarify treatment of cell-IQ and the DAB.
December 19, 2011	2.0	Major changes to reflect new POS interface for selling cell-IQ and accepting instalments.
September 6, 2016	3.0	Updated to reflect direct debit is now possible and added "Quick Reference for Processing Sales" section.

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Initial System Setup Required



Website

To ensure that cell-IQ™ appears on the list of services that your club offers it needs to be selected in:

- FCM > Management > Franchise Club Management > Club Settings > Published Details > Services

Company clubs can access the above settings via:

- FCM > Management > Update Published Club Details > Services

POS Products

Below are the products that have been set up for cell-IQ™:

- cell-IQ™ 8 Pack – Member
- cell-IQ™ 8 Pack – Non-Member
- cell-IQ™ 10 Pack
- cell-IQ™ 7 Pack
- cell-IQ™ 6 Pack
- cell-IQ™ 5 Pack
- cell-IQ™ 4 Pack
- cell-IQ™ 3 Pack
- cell-IQ™ 2 Pack
- cell-IQ™ Single Treatment
- cell-IQ™ Special Coupon Offer

Update any product settings (e.g. pricing, availability) to what you want. If you want to be able to direct debit cell-IQ instalments you'll need to edit your club settings for the "cell-IQ™ Instalment" product (see below) – simply tick "Allow purchase by Direct Debit", set "Extra Direct Debit Price" to 0, and then specify the min and max Direct Debit Payments (anything between 1 – 26).

There are also some other cell-IQ™ products required to assist in reconciliations and to help with reporting – you should not change the settings for these except for the Direct Debit Options of the "cell-IQ™ Instalment" product). They are:

- cell-IQ™ Contra Sale
- cell-IQ™ Instalment (Enable/Disable direct debit payments of instalments via your club's product settings)

Initial System Setup Required



- cell-IQ™ Instalment (Manual Direct Debit) (legacy product that was necessary before we added support for direct debit of instalments).
- cell-IQ™ Write-Off
- cell-IQ™ Non-POS Cash Amount
- cell-IQ™ Outstanding Balance (legacy product to be used to process any remaining cash payments for cell-IQ™ products not purchased through the new cell-IQ™ Purchase screen).

Steps

1. The client should complete a contraindications form. It is preferable to do this at the time of sale to reduce the time of the initial treatment.
2. Give the client the 'Pre Treatment Information' handout and get them to sign a Client Consent Form.
3. If she is not paying in full she will also need to complete a Direct Debit Request. Confirm both payment dates on the DDR form and the amounts. The client has the option to pay in full or pay in two payments. Treatments are not to be commenced until the 1st payment or 50% of the full amount has been received.
 - 3.1. Also record the member's name and the two debit dates on the manual DAB.
4. The DAB in FCM will update automatically to reflect any cash received for purchases/instalments and any money received via direct debit instalments.
5. If the client is not a member you will sign her up using the "cell-IQ™ 6 Week Complimentary" trial. This trial includes the four PT and 2 FC sessions required to complement the cell-IQ™ treatments.
6. Apply the sale in POS against the membership (refer to "Processing cell-IQ™ Sales" section for more details) via POS > Actions > cell-IQ Purchase.
 - 6.1. Select the relevant cell-IQ™ POS Product.
 - 6.2. Enter any discount (and reason) if there is one.
 - 6.3. Enter how much will be paid today and click Save Transaction.
 - 6.4. If you are going to direct debit the remainder do so via POS > Actions > cell-IQ Instalment (refer to "Processing cell-IQ™ Sales - Instalment Payments and Write-Offs") and choose an Instalment Type of "Cash, Eftpos, Cheque or Direct Debit" and the amount – in the "Save Transaction" screen choose "Pay By Direct Debit" and how many debits to pay it over.
7. Make the following appointments (refer to the "Booking cell-IQ™ Appointments" section for more details):
 - Initial treatment appointment (This date MUST be after her 1st payment date)
 - Food Coaching session (This date MUST be after her 1st payment date)
 - Personal Training session (This date MUST be after her 1st payment date)
8. Enter the times on the appointment card and give to the client.

9. As the client makes any outstanding payments (whether they be Cash, Eftpos, Direct Debit or a write-off of bad debt), record these in POS via POS > Actions > cell-IQ™ Instalment.
 - Personal Training session (This date MUST be after her 1st payment date)
8. Enter the times on the appointment card and give to the client.
9. As the client makes any outstanding payments (whether they be Cash, Eftpos, manual Direct Debit or a write-off of bad debt), record these in POS via **POS > Actions > cell-IQ™ Instalment.**

Checklist

Each client must complete:

- Client Consent Form
- Contraindications Form
- Direct Debit Request

Enter into the POS

Make the following appointments for:

- Initial treatment
- Complimentary Food Coaching
- Complimentary Personal Training

Give client:

- Appointment card
- Pre Treatment Information.
- cell-IQ™ Brochure
- Fernwood Magazine
- Copy of consent form
- Copy of Direct Debit Request form
- 3 Day Food Diary

cell-IQ™ sales are typically high value sales, which may not always be paid in full when initially sold. To enable us to report on what cell-IQ packs are being sold, as well as when instalments are being received we have custom screens for processing cell-IQ purchases/instalments in POS (they don't go through the standard cash register screens).

Below are the products that have been set up:

- cell-IQ™ 8 Pack – Member

Use this if you are selling to someone who has an existing Fernwood membership – this is priced cheaper to reflect their additional commitment.

- cell-IQ™ 8 Pack – Non-Member

Use this if you are selling cell-IQ™ to a non-member

(i.e. they are just at the club for cell-IQ™ and nothing else) – this is the highest rate.

- cell-IQ™ 10 Pack

cell-IQ™ 7 Pack (there are packs that less than 8 treatments for clubs that like to sell cell-IQ™ 'top-ups' to members but in general it is preferable to sell them another full eight pack treatment)

- cell-IQ™ 6 Pack
- cell-IQ™ 5 Pack
- cell-IQ™ 4 Pack
- cell-IQ™ 3 Pack
- cell-IQ™ 2 Pack
- cell-IQ™ Single Treatment

This product should only be used for special one off promotions etc. In general an eight pack should be sold.

- cell-IQ™ Special Coupon Offer

This product is used if the member purchased cell-IQ™ via some external site

e.g. Scoupon, Living Social, JumpOnIt etc and are presenting their coupon for redemption.

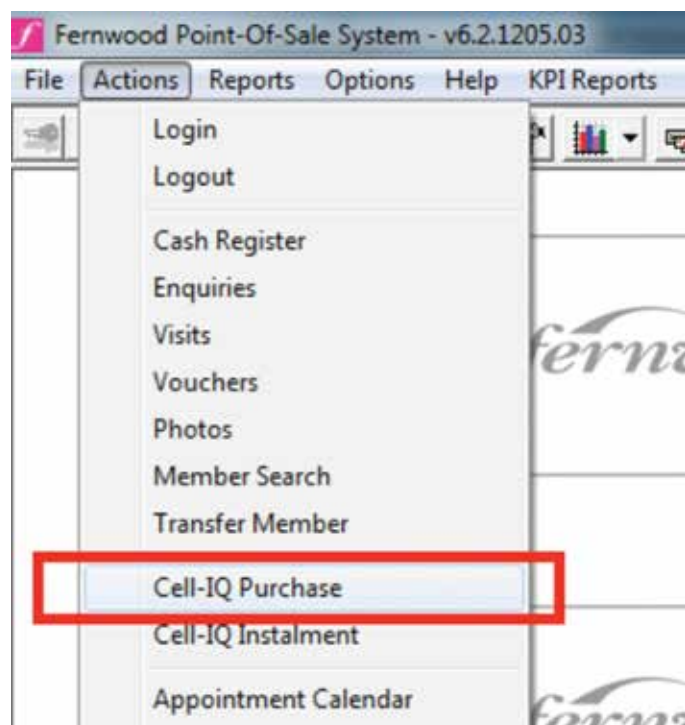
Default rates have been set for these products but when selling them clubs may choose to offer additional discounts due to things like launch specials or they may be paying for other services such as Endo as well.

Processing cell-IQ™ Sales



New Purchase

All new cell-IQ™ purchases should be made via a cell-IQ™ specific screen found in **POS > Actions > cell-IQ Purchase** (they should not be put through the regular Cash Register).



A sample cell-IQ Purchase screen is displayed below:

A screenshot of the 'Cell-IQ Purchase' window. It contains the following fields and values:

Cell-IQ Product	CellIQ 8 Pack - Member
Price	\$1,600.00
Discount	160.00
Discount Description	Launch special
Total	\$1,440.00
Paid Today	440
Initial Outstanding	\$1,000.00

At the bottom, there are two buttons: 'Save Transaction' and 'Cancel'.

To process a cell-IQ™ sale:

- Select what cell-IQ™ product you are selling and its price and any pre-set discount will be defaulted.
- The discount can be altered or removed. If you have a discount a description/ reason for the discount must be recorded.
- The total owing will be automatically calculated for you.
- Enter how much is being paid today (leave as zero if the member will be paying for it later).
- Click "Save Transaction" to bring up the "Save Transaction" screen to finalise the sale



The 'Save Transaction' window displays the following information:

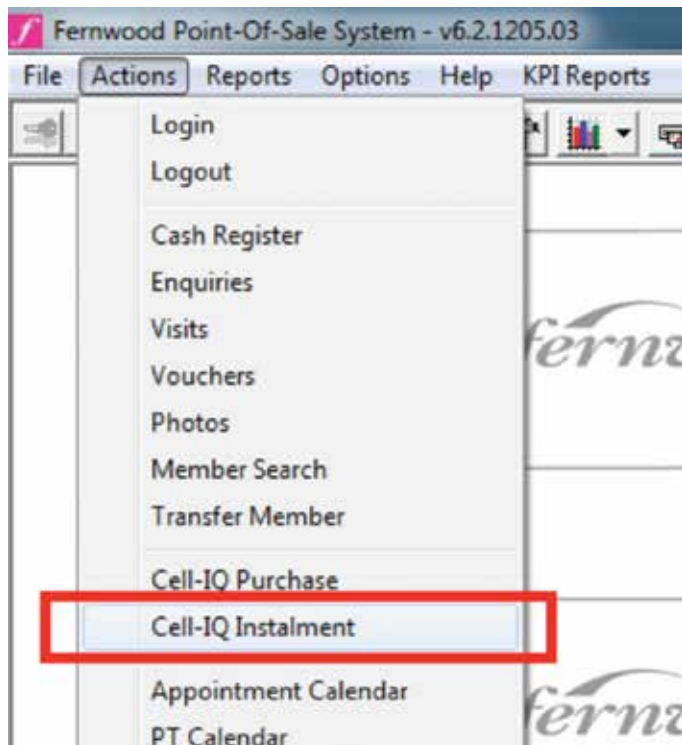
- TOTAL = \$440.00**
- Member Details:** Member ID: 123, Member: Murphy, Lucinda
- Payment Method:** ☒ Pay NOW ☐ Pay By Direct Debit
- Pay Now Options:**
 - CASH: \$0.00
 - CHEQUE: \$0.00
 - EFTPOS: \$440.00
 - OTHER: \$0.00
 - CREDIT CARD: \$0.00
 - ☒ VISA/Mastercard/Bankcard ☐ AMEX ☐ Diners
- Pay By Direct Debit Options:** DD Not Available (only one product at a time can be purchased by DD)
- Cash Tendered:** \$
- CHANGE = \$0.00**
- Receipt Printing:** Don't Print
- Salesperson:** cate butridge
- Buttons:** RECORD TRANSACTION, Cancel

- Enter what member is making the purchase, how the amount is being paid, whether you want a receipt, who the salesperson is and click "Record Transaction" and you're done! Note, if nothing is being paid today this screen will still display so that we can record who is making the purchase and who sold it etc.
- Remember if the member wants to pay for the purchase on direct debit it needs to be done as an instalment (refer to next section) – so if nothing is being paid upfront you'll need to select "Paid Today" as \$0 and save the transaction and then put through the entire amount as a direct debit instalment.



Instalment Payments and Write-Offs

All cell-IQ™ instalments/write-offs should be made via a cell-IQ™ specific screen found in POS > Actions > cell-IQ Instalment (they should not be put through the regular Cash Register).



Processing cell-IQ™ Sales



A sample cell-IQ™ Instalment screen is displayed below:

A screenshot of the "Cell-IQ Instalment" software window. The window has a title bar with standard Windows controls. Inside, there's a "Member Details" section with a "Member ID" field containing "321" and a "Member" field containing "sullivan, sally". Below this, there are fields for "Total Outstanding" (\$1,000.00), "Instalment Type" (a dropdown menu showing "Cash, Eftpos or Cheque"), "Instalment Amount" (a field with "400"), and "Outstanding (after instalment)" (\$600.00). There are "Save Transaction" and "Cancel" buttons. Below these is a section titled "View breakdown below:" with two tabs: "Purchases" and "Instalments". The "Instalments" tab is active, showing a table with columns: Date, Product Name, Amount, Discount, Total, Salesperson, and Disc Rate. The table has one row with data: "5/12/2011 4:44 PM", "CellIQ 8 Pack - Member", "1,500.00", "160.00", "1,440.00", "cate burbridge", and "Laun". Below the table, it says "Cell-IQ Purchase Total \$1,440.00".

To process a cell-IQ™ instalment:

- Enter what member is making the instalment – this will then load how much of their cell-IQ™ purchases are outstanding and show a detailed breakdown of purchases and instalments.
- Select one of two Instalment Types:
Cash, Eftpos, Cheque or Direct debit.
Write-Off – use if you think a portion of the outstanding money will not be received (this helps keep track of outstanding cell-IQ purchase amounts).
- Enter the Instalment Amount. The amount outstanding after this payment is processed is automatically calculated for you.
- Previous purchases and instalments can be reviewed in the tabs at the bottom of the screen.
- When satisfied everything is complete and accurate, click the “Save Transaction” button.



Save Transaction

TOTAL = \$400.00

Member Details:
Member ID: [321] Member: sullivan, sally

Payment Method:
☒ Pay NOW ☐ Pay By Direct Debit

Pay Now Options:
CASH [0.00] CHEQUE [0.00]
EFTPOS [400] OTHER [0.00]
CREDIT CARD [0.00] ☒ VISA/Mastercard/Bankcard ☐ AMEX ☐ Diners

Pay By Direct Debit Options:
[DD Not Available (DD not allowed for selected product)]

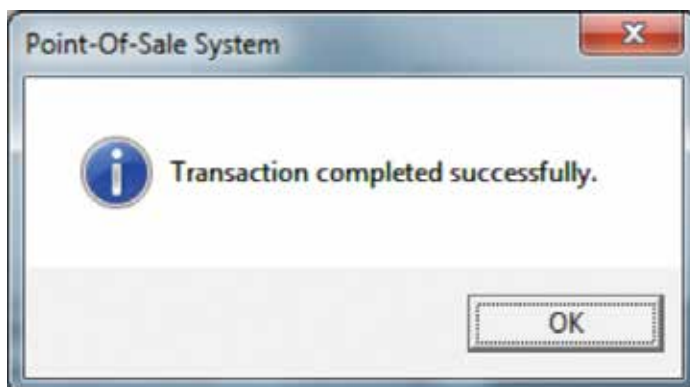
Cash Tendered: \$ []

CHANGE = \$0.00

Receipt Printing: [Don't Print]

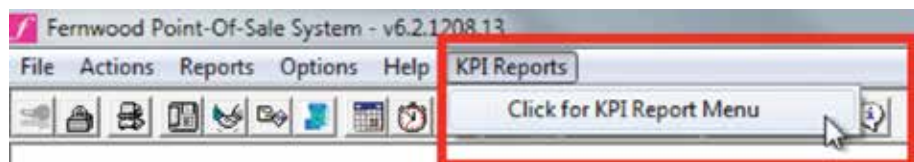
Salesperson: [abby gail] **RECORD TRANSACTION** Cancel

- Enter how the amount is being paid (Pay NOW or Pay By Direct Debit), whether you want a receipt, who the salesperson is and click "Record Transaction" and you're done!
- Note, if the "Pay By Direct Debit" option isn't enabled it means you either haven't enabled Direct Debit in your club product settings for Product ID:744 "cell-IQ Instalment" (update it and choose POS > Actions > Synchronise) or the member isn't setup in our system for direct debit.
- Note, if you chose an instalment type of "Write-Off" it means no cash is being processed through POS so to ensure the Cash Register balances the total owing will be \$0, but the full value of the instalment (write-off) will still be recorded in the system (you won't be charged royalties on the write-off amount). This screen still displays so that we can record who is making the instalment and who processed it etc.

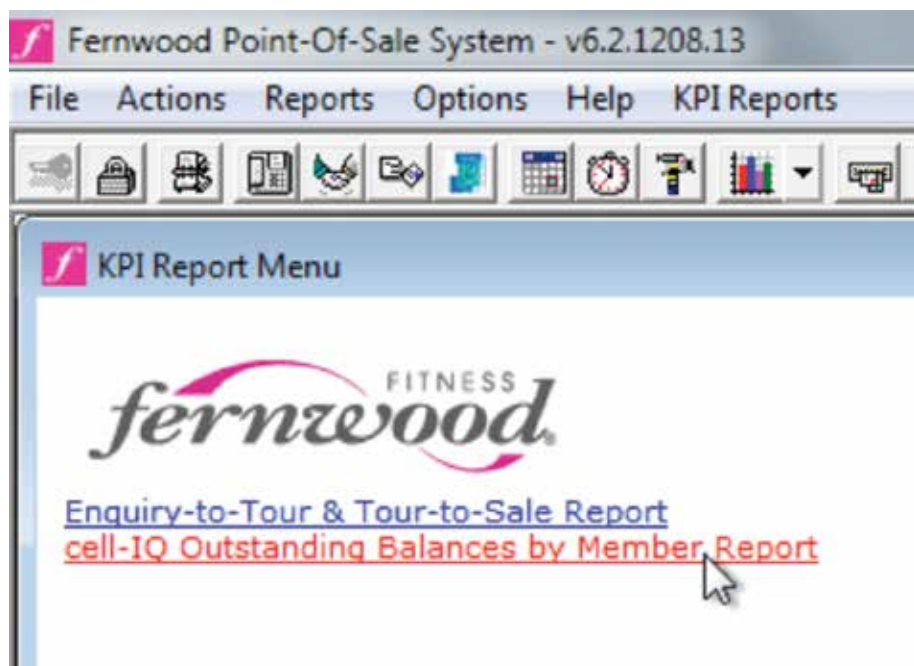


Reporting

To assist in keeping track of outstanding cell-IQ™ purchases, a report has been created which is accessible via POS > KPI Reports > Click for KPI Report Menu



Then click on the "cell-IQ™ Outstanding Balances by Member Report" link



This will display a report listing all members at your club that have purchased cell-IQ™, how much the total cost of that cell-IQ™ was, whether any of it has been written off and how much has been paid back. The final column shows how much is outstanding for each member.



The screenshot shows a report titled 'cell-IQ Outstanding Balances by Member - Melbourne City'. It includes a table with the following data:

Member ID	Member Name	Purchases	Write Offs	Installments	Outstanding Balance
990496	Sara Abbott	\$1600.00	\$0.00	\$111.00	\$1489.00
909052	Shannon Abernethy	\$1600.00	\$0.00	\$0.00	\$1600.00
123	Amy Robinson	\$1440.00	\$333.00	\$400.00	\$707.00

This report can be exported in multiple formats including Excel, CSV, PDF and Word so that you can manipulate the data further if required (e.g. filter out everyone with a zero outstanding balance).

Booking cell-IQ™ Appointments

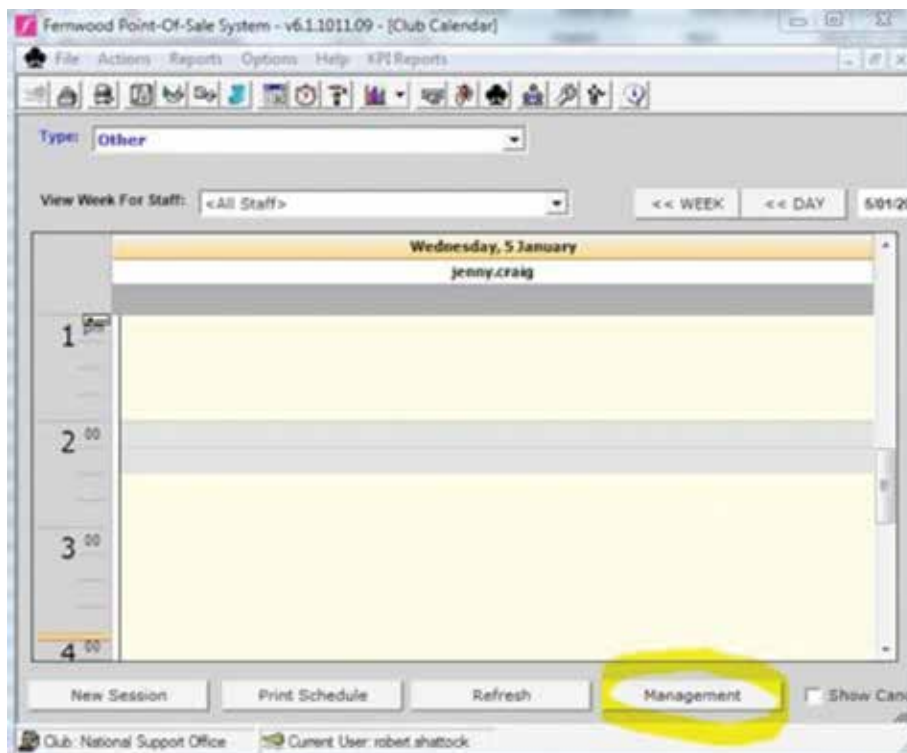


You've made some cell-IQ™ sales, now what? You have to organise the appointments in a similar fashion to Endo or Food Coaching etc. The steps required are as follows.

- Bookings for cell-IQ™ are stored in the POS Club Calendar under the "Other" type, with a sub-type of "cell-IQ™".
- The Club Calendar functionality is described in the "Club Calendar Manual" but in brief the Club Calendar is accessed in POS via POS > Actions > Club Calendar or by clicking on the "Club" icon



- As with any appointment type in the club calendar, staff members must first indicate what days and times they are available to work. This is done via POS > Actions > Club Calendar > Management



Booking cell-IQ™ Appointments



- Select the Staff Member who is going to be doing the cell-IQ™ appointments and click "Set Working Time".

Club Calendar - Management

Type: Other

Reports

Select Report: Active Status Report

From Date: 5/01/2011 To Date: 5/01/2011

Staff: <All Staff>

View Report

Working Times

Staff: Jenny Craig

Set Working Time

Close

NOTE: To ensure the staff that do cell-IQ™ appear here you must give them the Position Role of "cell-IQ™ Consultant" in FCM > Management > Staff User Manager > Position Details.

Fernwood Club Management

Home | Staff | Members | Finance | Management | Resources | Miscellaneous | Admin

Quick Links: Edit Employment Type

Staff View | Edit Personal Details | Edit Position Details | Edit Staff Background | Edit Admin Options

Staff Member: temp.3

View Position Details For: National Support Office

Position Details

Start Date:

On Staff Boolean:

Position Roles:

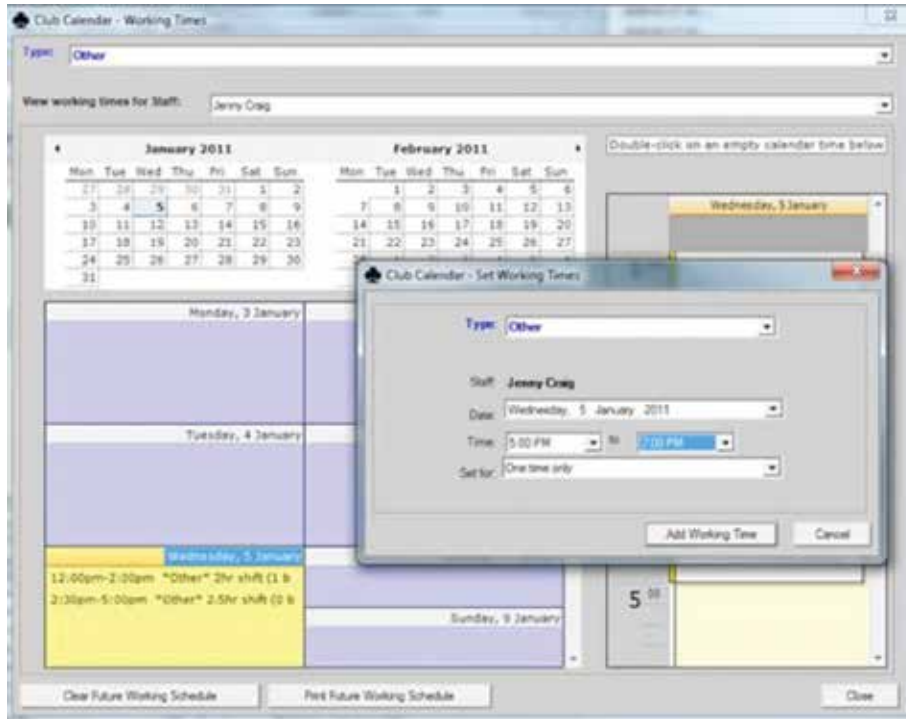
Role	Type	Payroll District	Club Default Rate	Wage Rate
Cell-Iq Consultant			\$0.00	\$
			\$0.00	\$
			\$0.00	\$
			\$0.00	\$

*Leave wage rate blank to use default rate.

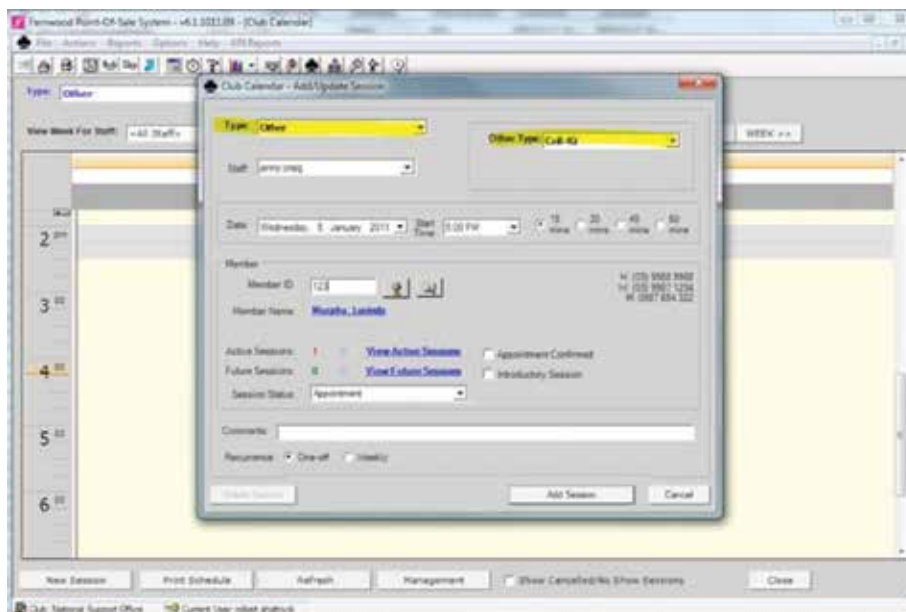
Booking cell-IQ™ Appointments



- Create a working time for the "Other" calendar type (note, as with all working times in the club calendar, a staff member cannot have working times for different types that overlap).



- With the working time created, members can then book into a cell-IQ™ appointment by creating a club calendar session of type "Other" and Other Type of "cell-IQ™".



When I look at the POS sale receipts and the member purchase history I see some strange products such as “cell-IQ™ Contra Sale” and “cell-IQ™ Non-POS Cash Amount”, what are these?

- These are used to ensure that the POS End of Day report balances because we are processing purchases and payments in POS for which the money might be received at a later date or via manual Direct Debit (so you can ignore these).

Why doesn't the “cell-IQ™ / Other Royalty Free Sales” field on my DAB report reflect the total value of the cell-IQ products that I've sold?

- This field only reflects the amount of cash sales through POS that were royalty free (cell-IQ™ or otherwise). The POS payments field includes royalty free sales, so we deduct this amount from the POS payments total when calculating standard royalties (cell-IQ™ royalties are calculated separately of the DAB).

Why can't we use FCM to Direct Debit cell-IQ™ purchases like we do for all our other Direct Debit purchases?

- When we do a banking export there is currently no way for us to accurately determine how much of the debit relates to cell-IQ™ products which have a different royalty percentage, especially if a debit is rejected and then put on a payment plan etc. So if you do debit a cell-IQ™ purchase through FCM you will be charged your standard royalty percentage plus a cell-IQ™ royalty percentage – hence why we strongly recommend you manually debit cell-IQ™ purchases.

Why doesn't the cell-IQ™ Instalment screen show the older cell-IQ™ purchases and payments for a member?

- So that we can accurately determine how much a cell-IQ™ purchase is outstanding, the outstanding balance and any breakdown is only based on the new cell-IQ™ products set up. To see old cell-IQ™ purchases simply refer to the member's purchase history.

Processing a Paid In Full sale

- POS > Actions > cell-IQ purchase
- Select relevant cell-IQ product
- If a discount is to be applied enter the discount and reason
- Enter total amount of product
- Click "Save Transaction"

Processing a Direct Debit transaction

- POS > Actions > cell-IQ purchase
- Select relevant cell-IQ product
- If a discount is to be applied enter the discount and reason
- Enter how much is to paid today and click "Save transaction"
- Direct debit remainder must be done via POS > Actions > cell-IQ instalment
Choose instalment type "Cash, Eftpos, Cheque or Direct debit" and the amount
- In the "Save Transaction" screen choose "Pay by Direct Debit" as your Payment Method and how many debits to pay it over.

Processing a sale that is paying in instalments but not by Direct Debit

- POS > Actions > cell-IQ purchase
- Select relevant cell-IQ product
- If a discount is to be applied enter the discount and reason
- Enter how much is to paid today and click "Save transaction"
- If they are paying an instalment
- POS > Actions > cell-IQ Instalment
- Choose instalment type of "Cash, Eftpos, Cheque or Direct debit"
- In the 'Save Transaction' screen choose 'Pay NOW' as your Payment Method and choose your "Pay Now Options".
- Click "Save Transaction"