Marché Subscription Manager

User Manual

July 02, 2017

Your subscription management champ!

A gym, training center, social club, clinic or any service provider: Marché Subscription Manager is proven to be the easiest system to keep track of all your customers and their subscriptions, billing, suggesting important notifications for you and your customers and keeping you on track with your business performance.

In this document, we will show you how to start using Marché Subscription Manager. It is as easy as 1, 2, 3! Are you ready?

How to use it:

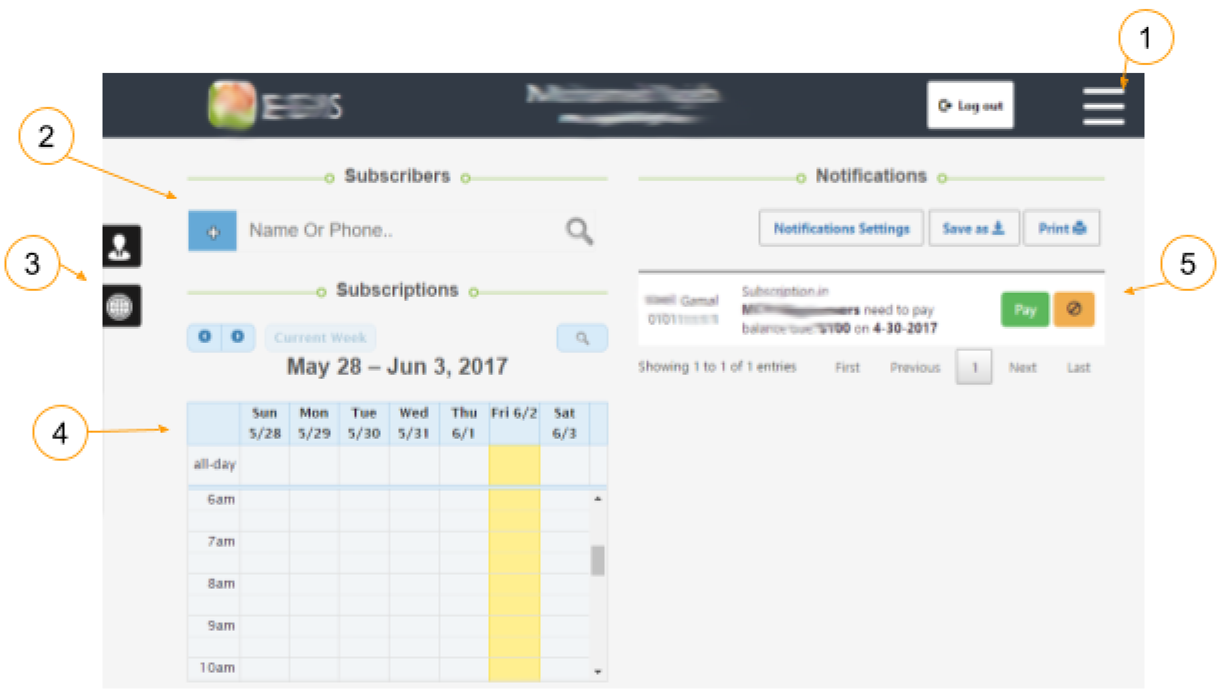
1- Create your free account

- Go to marchesuite.com and signup for a free account.
- Activate your account from your registered e-mail inbox.

2- Login and prepare your account for business

1. Define your default business information and your prefered language from the one-time-display-popup. (you can change the user interface language anytime later)

3- Welcome home!



1. The main menu is on the top right of the page to manage your business data.
2. Add & Search you customers from the big Subscribers box.

3. Change your password or your prefered language in any time by clicking on the corresponding icon.
4. The programs you define will be displayed in this interactive Subscriptions Calendar.
5. System will always propose important notifications to take actions directly from the Notifications Panel.

This is pretty easy, isn’t it?

Now let’s dig into more detailed operations and how to achieve them in Marché Subscription Manager.

1. Define a new program
2. Define a new item - non-program - to be sold.
3. Define a new customer
4. Create a new subscription invoice for existing customer
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   - 4.2. Items sales invoice
5. Create a new staff member (system user)
6. Accessing business reports
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10. Create a customer account
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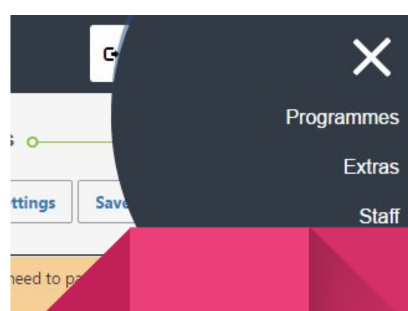
1. Define a new program

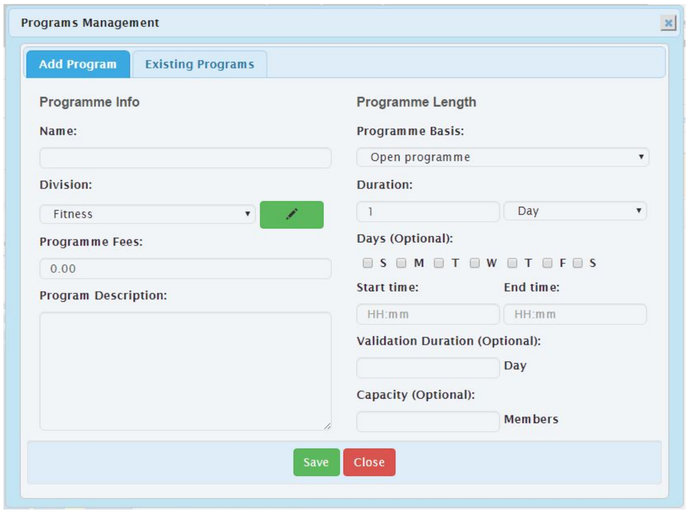
Programs are the courses that you provide at your gym or training centers. It can be anything like ‘ICDL Course, English Level 1, Fitness



Course'. You should define programs in order to be able to subscribe your customers to it.

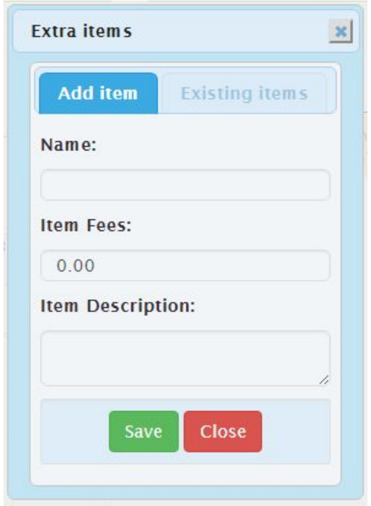
To define a new program, follow the next few steps:

1. From the far-right menu icon, choose Programmes.
2. Click (Add Program) tab and fill the program information.
3. Choose the program basis (open program/fixed period/per single visit or multi visits). Please note that:
    a. Open Program: a program which is available during the business lifetime, i.e. it doesn't have start and end dates.
    b. Fixed Period: a program that is available exclusively in a given date range. E.g. A course group that starts at 1st June 2017 and ends by 15 June 2017.
    c. Per single visit or Multi visit: A program that its subscription is based on visits number, not duration.
    d. Validation duration: The maximum time that the subscription remains valid, in particular with visits-based subscriptions. It is an optional field.
    e. Capacity: the class capacity. It is an optional field.
4. After filling all the required information, click Save.



2. Define a new item - non-program - to be sold.

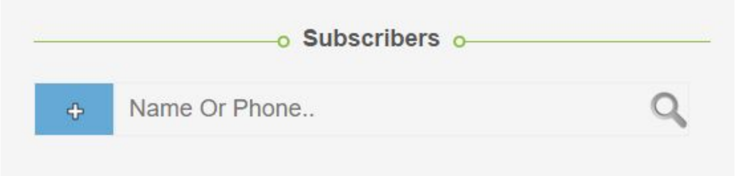
Extra items are the non-subscription based items, which your offer to sell to your customers. For example: sellable course materials, soft drinks, .. etc. After you define extra items, they can be used in customers invoices.



To define a new item, follow the next few steps:

1. From the far-right menu icon, choose Extras.
2. Click (Add Item) tab and fill the item information.
3. After filling all the required information, click Save.

3. Define a new customer



To add your business members or customers:

1. click on the (+) sign beside the big search box to open the new subscriber window and start filling the customer information.
2. You can add a customer photo by clicking (Choose Photo), browse your computer and select an image file.
3. Click (Next) to save customer information. You can close the window after clicking Next if you won't be enrolling the customer in any of the programs yet.

4. Create a new invoice for existing customer

4.1. Subscription Invoice

If you want to create a subscription for a new customer - a customer who is not defined yet in the system -, then first follow the instructions on how to define a new customer, then start the steps from step 2 below.

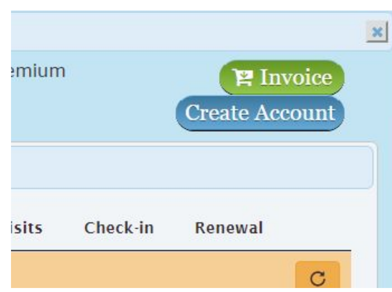
If one of your customers want to subscribe in a program, follow the next few steps:

1. **From the big search box, search for customer using his/her name or phone number to open the Member Profile window.**
2. **From the (Subscribe) tab, choose the program to enroll the customer into, select the dates and click (Next) to view the invoice.**
3. **In the (Current Paid), define the amount the customer had paid.** *Default is zero.*
4. **The invoice is now ready, you may click (Save) to issue it, or (Save & Print) to print a copy to your customer.**

4.2. Items Sales Invoice

If one of your customer wants to buy an extra item , to do this, follow the next few steps:

1. **From the search box on the top-left, search for the customer by typing his/her name or phone, and select your customer from list to open the Member Profile window.**
2. **Click the green (Invoice) button in the top right corner to open the invoice tab.**
3. **Choose the item (s) you want to sell, set the amount of money the customer had paid, then click (Save) or (Save & Print).**



5. Create a new staff member (system user)

NOTE: You need to be either an Owner or Admin user in order to be able to create a new user.

You may add other users - work colleagues/ other receptionists - to help you running your business. There are 3 roles (types) of users:

- Owner: The business owner, usually the person who signed up for the Marché Subscription Manager company account. Owner can create/edit/suspend/delete other admins and basic users.
- Admin: can create/edit/suspend/delete basic users.
- Basic user: can use the system and change his/her own password.

To add a new user, follow the next few steps:

1. From the far-right menu, click Staff.
2. Click (Add User) tab and fill the item information, and select the appropriate system role.
3. Click (Save).

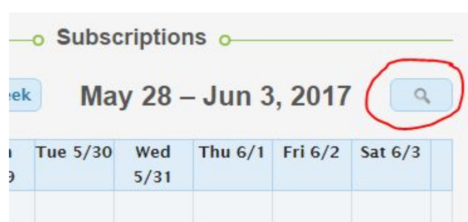
6. Accessing business reports

To help you measure your business performance, we are constantly adding new reports, charts and statistics to the system. To access business reports, follow the next few steps:

1. From the far-right menu, click Reports.
2. The Reports main window shows the most important statistics based on your business performance.
3. To get more details regarding any of the provided statistics, simple click on the icon and follow the instructions.

7. Advanced calendar view

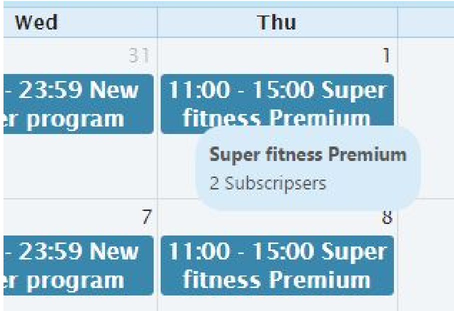
Marché Subscription Manager contains a powerful calendar - similar to Google Calendar - to allow you to easily visualize the running programs and spot the idle hours. After sometime, you will have many defined programs in the system, so you might need to have more comfortable and bigger view and also be able to search programs, find who is registered in any given program, make a check in for many members quickly, and see your subscriptions in the long run.



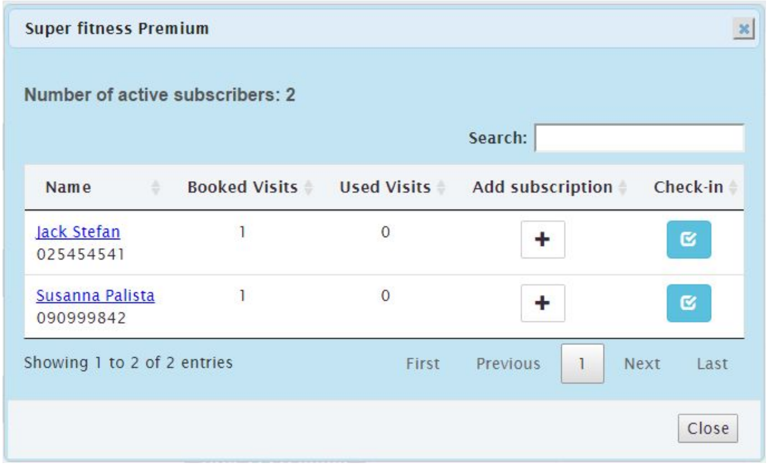
In order to do this, follow the next few steps:

1. Click the (Zoom/Search) icon in the default calendar's top-right corner, this will open the advanced calendar view.
2. Move the mouse over any program to see how many subscribers are currently enrolled into it.

3. To view the subscribers list of any program, just click on the program on the calendar, or use the search box to search for the program and select it from the popup list. This will open the Program Subscribers window.

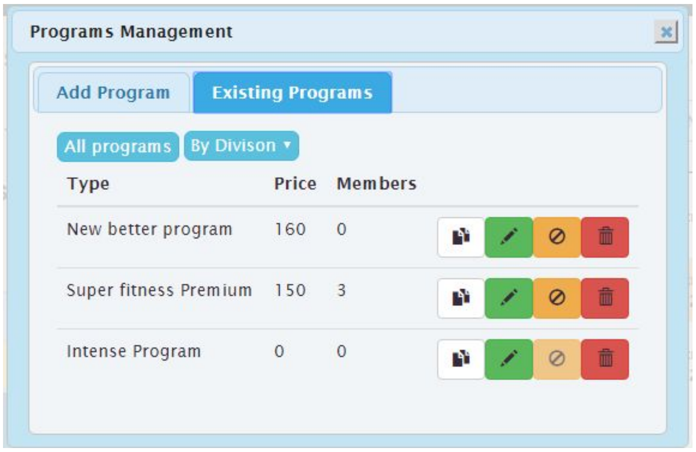


From the Program Subscribers window, you can perform member check in and add subscriptions to listed members. Also, you can search for members and open any member profile.

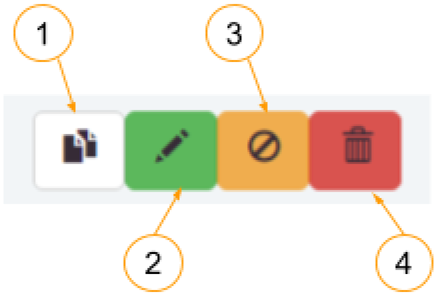


8. Edit existing program

If you want to edit a program information - like title, schedule or fees - you can do this by following the next few steps:



1. From the far-right menu icon, choose Programmes.
2. Click (Existing Programs) tab and choose the required action associated with every program
    - Clone: Creates a copy of the program with the exact same details, you can edit the new copy and treat it as an independent program.
    - Edit: Change program information
    - Suspend: Stops the program from accepting new subscriptions, you can de-suspend it again.
    - Delete: Remove the program from the programs list forever.



9. Edit existing item

To edit an existing extra item, follow the next few steps:

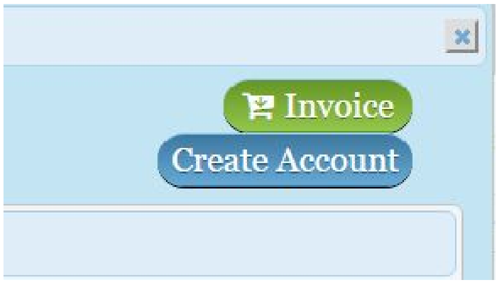
4. From the far-right menu icon, choose Extras.
5. Click (Existing Items) tab and click the (Edit) icon.
6. Make the required changes then click (Save).

10. Create a customer account

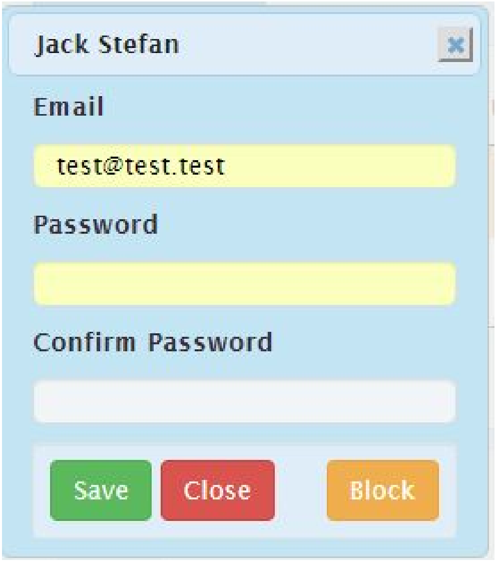
You may choose to allow your customers to be able access their notifications and program information. For example, your customer might need to know his/her due payments or the subscription(s) about to end.

Marché Subscription Manager allows you to create a 'customer account' for your customers. They can access their data using the same login page as yours, and you can block any customer account or change their password.

To create a customer account, follow the next few steps:



1. Using the big subscribers search box, Search for the customer using his/her name or phone to open Member Profile window.
2. From the Member Profile window, click the (Create Account) button.
3. Fill in the customer e-mail and passwords then click (Save).



11. Edit existing customer

To edit a customer account, follow the next few steps:

1. Using the big subscribers search box, Search for the customer using his/her name or phone.
2. Click (Subscriber) tab and do the changes you need then click (Next) to save.

12. Manage staff users

NOTE: You need to be either an Owner or Admin user in order to be able to edit an existing user.

There are 3 roles (types) of users:

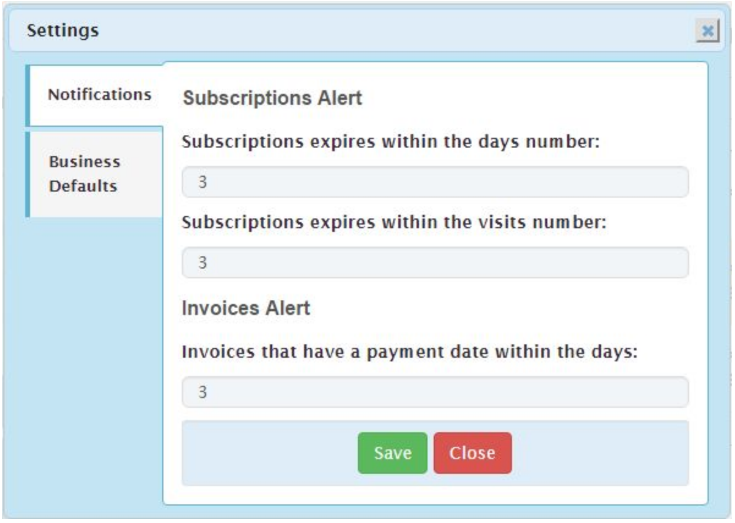
- Owner: The business owner, usually the person who signed up for the Marché Subscription Manager company account. Owner can create/edit/suspend/delete other admins and basic users.
- Admin: can create/edit/suspend/delete basic users.
- Basic user: can use the system and change his/her own password.

To add a new user, follow the next few steps:

1. From the far-right menu, click Staff.
2. Click (All Users) tab and fill click the (Edit) icon, change what you need then click (Save).
3. If you want to block certain user from accessing the system, click the Status icon to switch the user account On/Off.

13. Change settings

You can configure Marché Subscription Manager based on your business. For example, you can set your business logo in order to be displayed on the invoices, configure the default working hours, and configure when Marché Subscription Manager should notify you ahead about the expiring notifications and late customer due payments.



To change the settings, follow the next few steps:

4. From the far-right menu, click Settings.
5. From the Notifications tab, set your preferred settings.
6. You can change the logo and the business hours from the Business Defaults tab.

For any help, you can mail us at support@marchesuite.com. We will be more than happy to help.

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