Nexudus Signup and Onboarding Walkthrough

Version: 01/22/2022

Steps for setting up a new Member:

- Register a New Member
- Sign Member Agreement & Liability Waiver
- Assign them a Key Fob
- Onboard and sign up for Basecamp

What do I do if the new member has a special circumstance (Student, Add-On, GIft Certificate, etc..) or I run into a problem?

1. If you are trained to do so, go to the **Special Circumstances** section and follow those instructions.
2. If you have not been trained or if the issues aren't related to a special circumstance, to the following
    a. Run the member through the **Onboarding Process** as usual including signing them up for **Basecamp** and going over the **Onboarding and Orientation** document.
    b. Give them a Key Fob (but do not attempt to assign it online)
    c. Collect the following information from them
        i. Name
        ii. Email Address
        iii. Key Fob #
        iv. Special Circumstance or issue (what are they trying to do that you were unable to help them with)
    d. Send this info in a **Ping to Mike Irons and Rio Sabella**
    e. Tell them that we will follow up with them within approximately 48 hours to get them set up.

Register a new member

1. Have new member create a profile on this page: https://lowellmakes.spaces.nexudus.com/en/signup

   *Note: If they are joining as a Household Add-on, a student, or are using a gift card, continue to **Special Circumstances***

2. On the next page, have them select a membership and check the Terms and Conditions checkbox. **CLICK JOIN**

3. DO NOT have them add any Add-Ons at this time. They can add storage by talking to SpaceCom or the Shop Captains.

4. Click **CONTINUE**

5. Put in payment information. Card will stay on file for future payments.

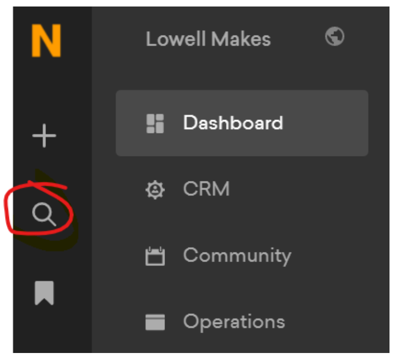
   Note: It is LM policy that accounts must have a card on file. For subscription (recurring) memberships, Auto-Pay must be enabled.

6. Move on to assigning them a fob.

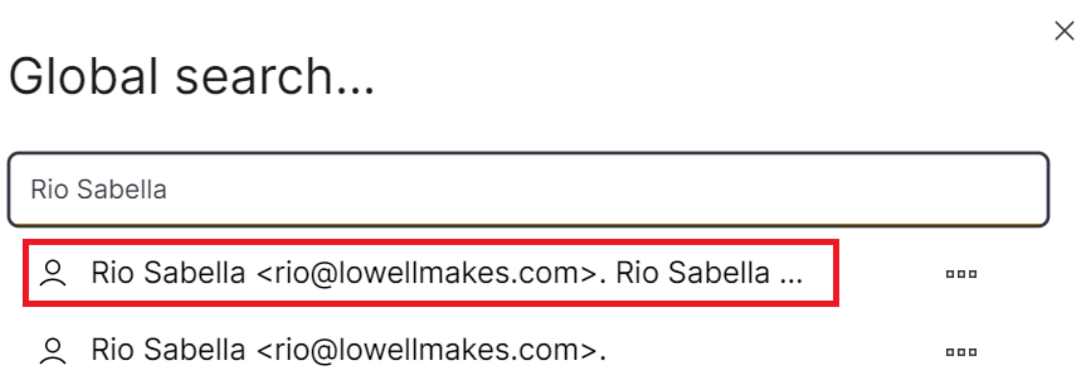
Sign the Member Agreement & Liability Waiver

1. Go to the Nexudus Dashboard at dashboard.nexudus.com and use your login info to log in as an admin.

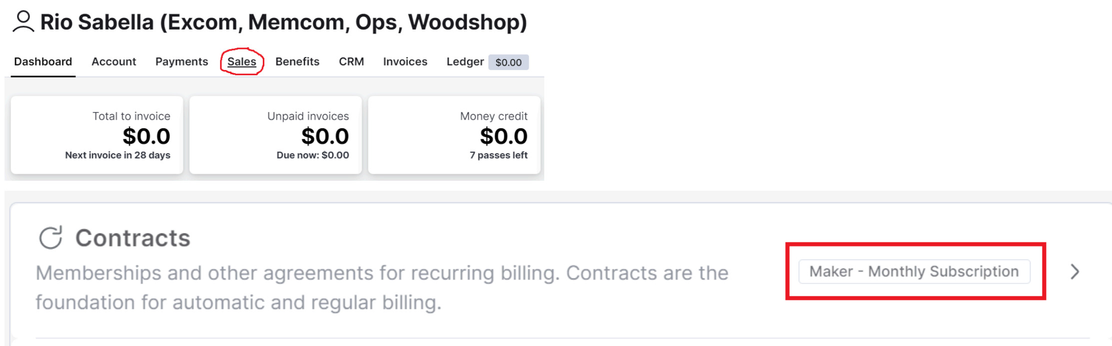
2. Once in Nexudus, use the search on the left side to find the new member's name



3. Select the correct member account

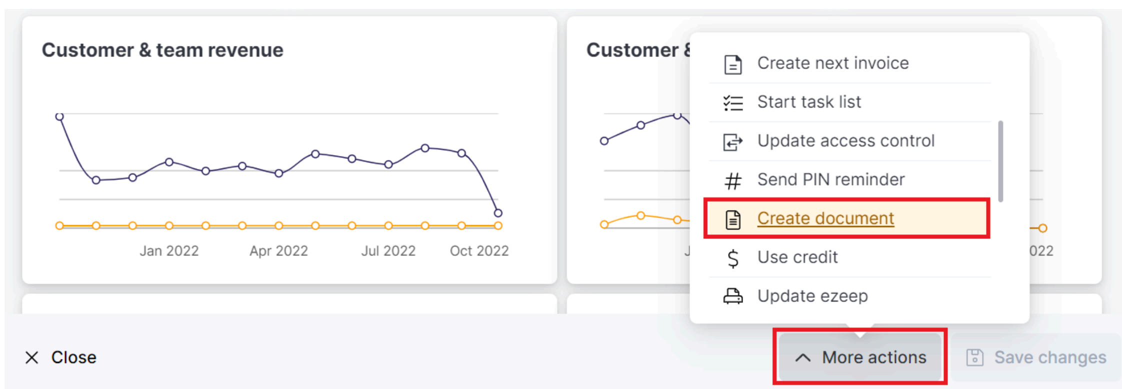


   Note: Occasionally, multiple accounts will appear with the same member name (see above). Make sure to choose the account that has a membership attached to it. To confirm this, click on the member's name, click on Sales and look for a membership under the Contracts section.

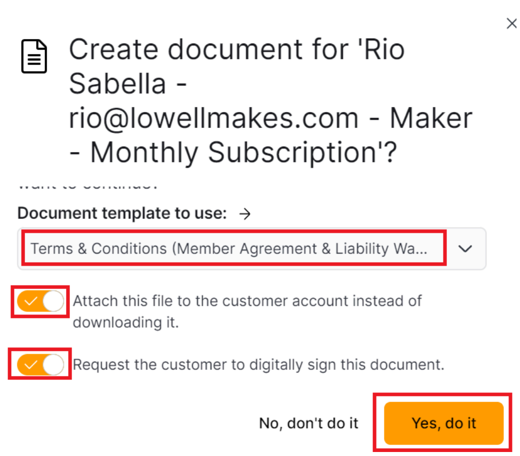


If no Contract is listed, return to the search and select the other account under the same name.

4. On the bottom of the screen, click **More actions** and choose **Create Document**



5. Within the Pop-up window, click the ‘Document template to use ->” drop down menu and select **Terms & Conditions (Member Agreement & Liability Waiver).** Do not choose any of the other templates.



6. Turn ON both toggles labeled “Attach this file to the customer account instead of downloading it” and “Request the customer to digitally sign this document”
7. Click **Yes, do it.**
8. This will send a copy of the Terms and Conditions to the member’s email. Have them open their email, locate the message, and read and sign the document included in it.

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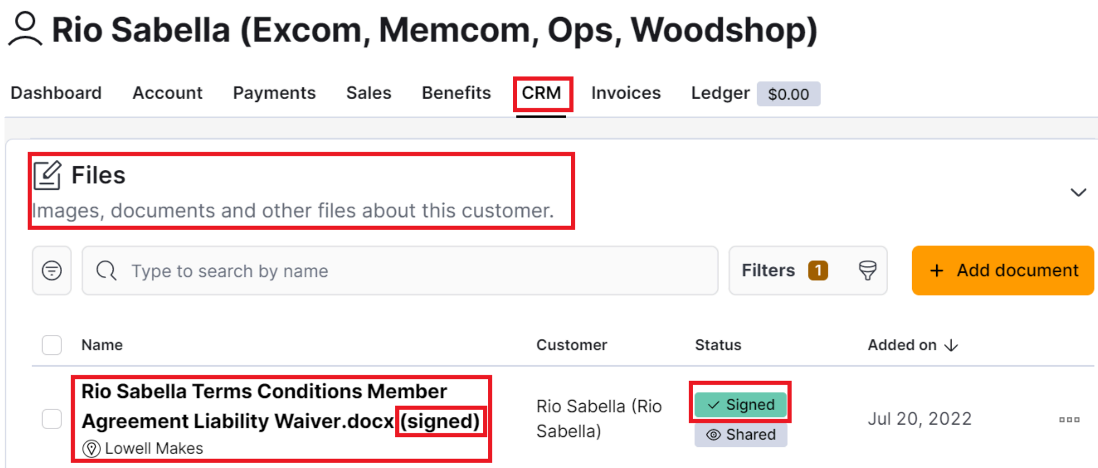
THIS IS REQUIRED FOR ALL MEMBERS BEFORE THEY ARE CONSIDERED A MEMBER.

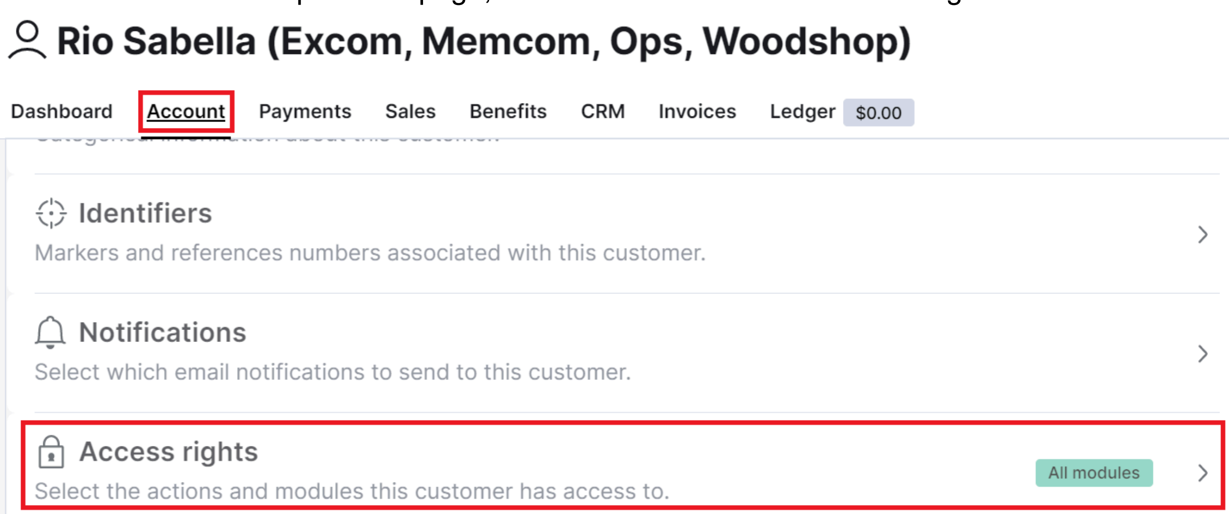
9. To check the status of their T&C document, navigate to their Account and select **CRM**. Scroll down to **Files.** You should see the Document you created. If it has been signed, it should say **Signed** in two locations: under "Status" and in parentheses at the end of the document's name.



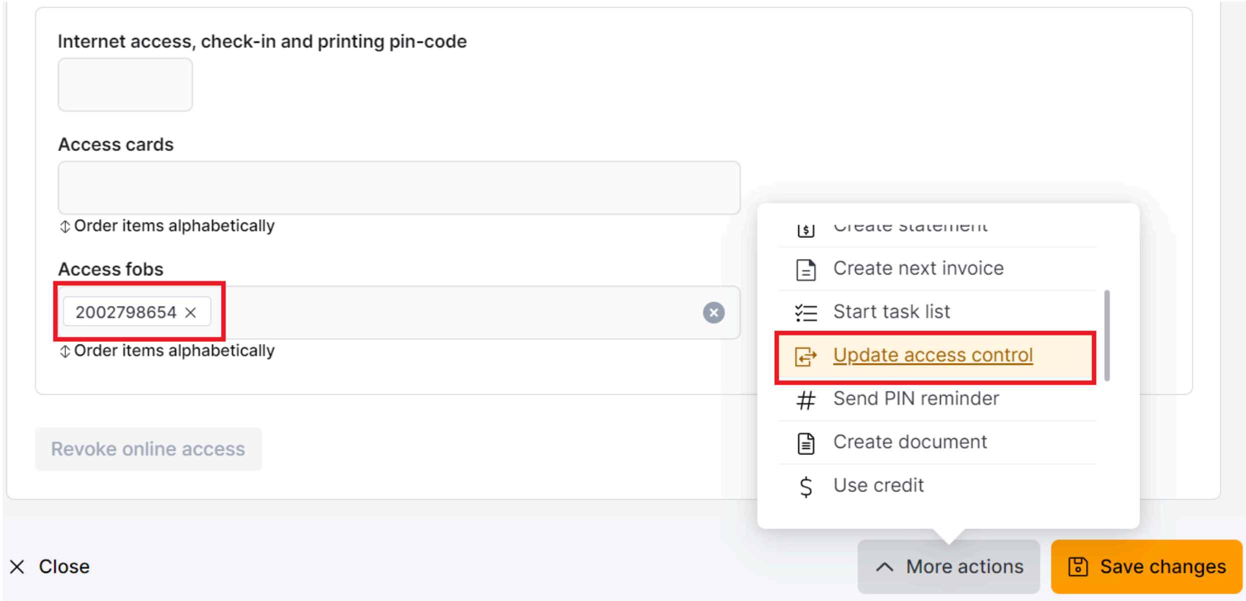
10. Once this is done, you can move onto assigning them a FOB.

Assign a FOB

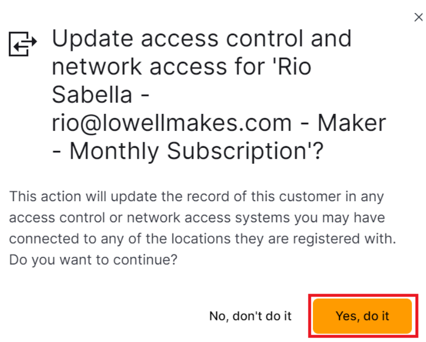
1. Navigate to Member's Account (using the instructions in the "Sign the Member Agreement and Liability Waiver" section above)
2. Click 'Account' on the top of their page, and then scroll down to 'Access Rights'



3. Scroll down to 'Access Fobs'
4. Scan the blank FOB on the card reader that is in the Conference Room and make note of the number, or read the number off the sticker on the back of the FOB.
5. Enter the number from the reader or sticker the **Access fobs** field. **HIT ENTER.** The number should appear in a box with a small X next to it.



6. Click the More actions menu box and select Update Access Control. A pop-up will appear confirming your decision. Select ‘**Yes, do it**’



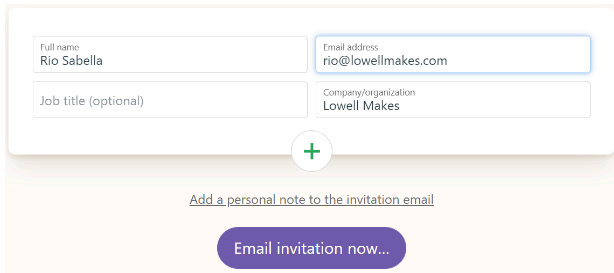
7. It can take a couple of minutes for the update to go through, so be patient
8. To test the fob, tap it to the card reader in the classroom. If it worked, the reader will turn green
NOTE: It will only turn green if the user has paid their invoice and has an active membership. If they have not paid, or they selected a start date in the future, their fob will not work yet.
9. Move on to Onboarding

Onboarding & Basecamp

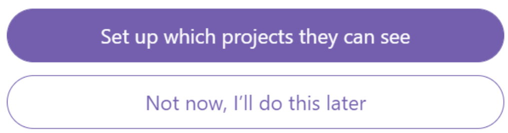
1. Sign up for Basecamp. New Members must be INVITED to join Basecamp.
    a. First, Click this link: https://3.basecamp.com/3376147/account/enrollments/employees/new

    This will bring you to the same place as the Invite People link in Basecamp.

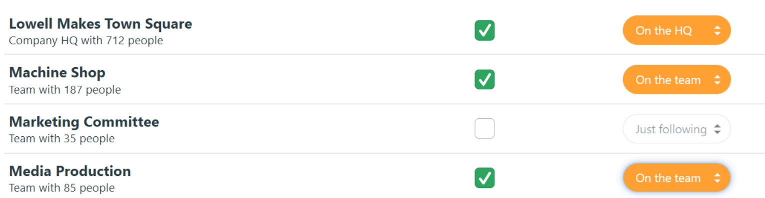
b. Log in to your Basecamp account
c. Add their name and email and click "Email invitation now..."



d. Click "Set up which projects they can see"



e. Check boxes next to **Lowell Makes Town Square** and any other Team or Projects they want to join.
f. Change **"just following"** to **"On the team"** and hit Save changes



g. Show the new member the basics of how to use Basecamp

2. Go over the **Onboarding and Orientation Document** in its entirety.

   Onboarding and Orientation Packet.docx

3. Ask if they have questions
4. Go over the **Onboarding and Orientation Document** in its entirety.
5. Ask if they have questions
6. They are good to go!

~~Special Circumstances:~~

Add-On Memberships

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Add-On memberships are for people who want to be added to an existing member's account. There are rules about who can do this and how, so please make sure the Add-On member is legit before proceeding.

Add-On Rules:

A **Maker-level** member is allowed **ONE** add-on who must be a part of their household (share an address)

A **Professional-level** member is allowed **THREE** add-on members. They do not need to share a household

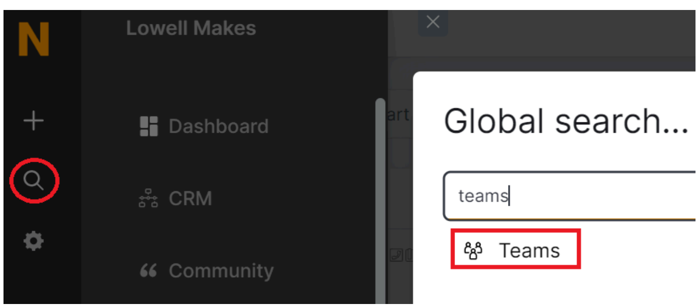
An **Entrepreneur-level** member is allowed **FIVE** add-on members. They do not need to share a household.

Does the primary Account Holder have a membership already?

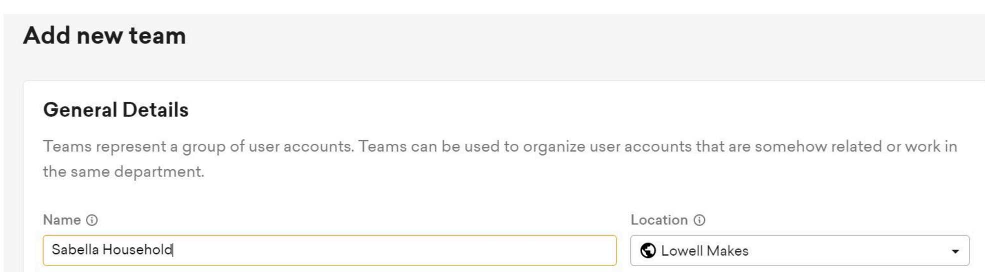
No - Proceed to step 1.

Yes - Proceed to Step 2.

1. Have the Primary Account Holder create an account using the **Register a New Member** instructions above.
2. Log into Nexudus as an Admin. https://dashboard.nexudus.com/
3. Search for **Teams**



4. Open **Teams**
5. Click **+Add Team**
6. Choose **Manual Entry**
7. Enter the Team Name. (Primary Account Holder's "Lastname Household"



8. Hit **Save changes**
9. Click on the new Team to open it up

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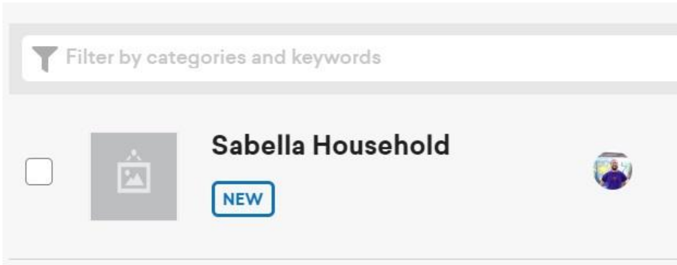
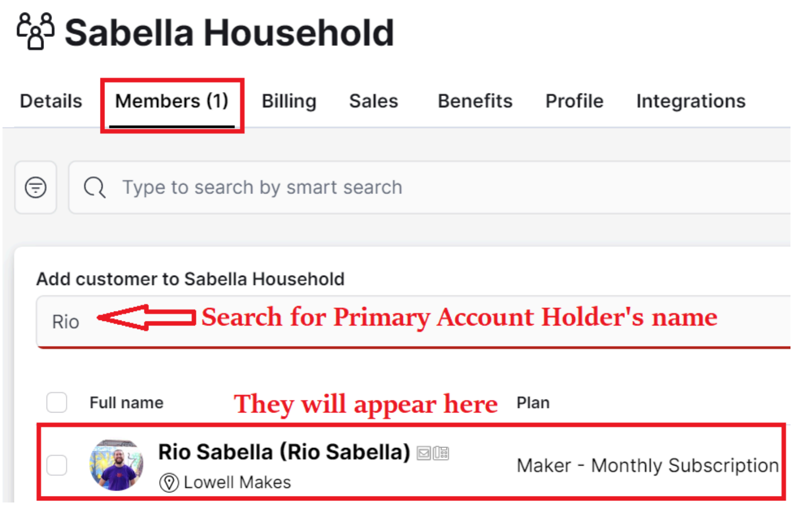
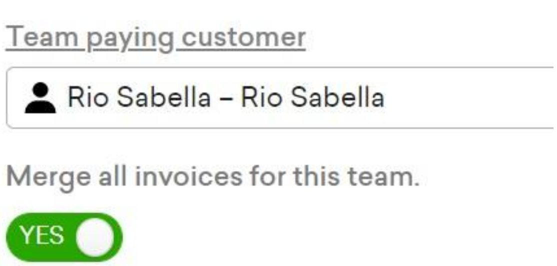


10. Go to **Members**
11. Search for Primary Account holder's name and add them to the Team



12. Ask if they want **merged invoicing** (the Primary pays the whole bill)
    a. If Yes, go on to step 13
    b. If they want **individual invoicing** (each person pays their own bill) **SKIP to step 14.**
13. **Merged Invoicing:** Within the Team, go to **Billing**
    a. Click "Merge all invoices for this team" toggle
    b. Search for the paying customer under the dropdown and select them



    c. Then Click **Save Changes**

14. Ask if the **Add-on** member has an account already?
    YES - Proceed to step 15.
    NO - Proceed to Step 25.

For Add-Ons who already have an account

15. Go back to the **Members** section of the team's page
16. Search for Add-On Member's Name
17. **Confirm**
18. Now go to the Add-On Member's Account page
19. Go to **Sales** → **Contracts**
20. Add Contract
21. Select an Add-On Plan that matches the Primary member's contract type. i.e Add-on One Month, Add-on Monthly Subscription, etc.
22. Confirm that the "Next Invoice Date" is the date they are signing up and that "Next Invoice period" matches it.
23. Save Changes
24. **Skip to Step 33.**

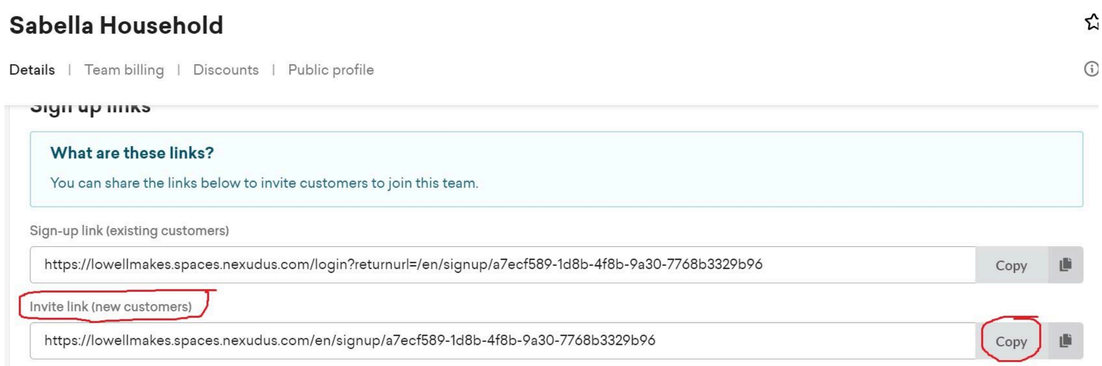
For Add-Ons who DO NOT already have and account

25. From the team's page, go back to **Details** and scroll to the "Default Plan for new members" dropdown list.
    a. Select "Add-on - " then select the Primary Member's membership type. (If they have a Monthly subscription, choose "Add-On - Monthly Subscription". If the Primary has a One Year, choose "Add-on - One Year", etc.)

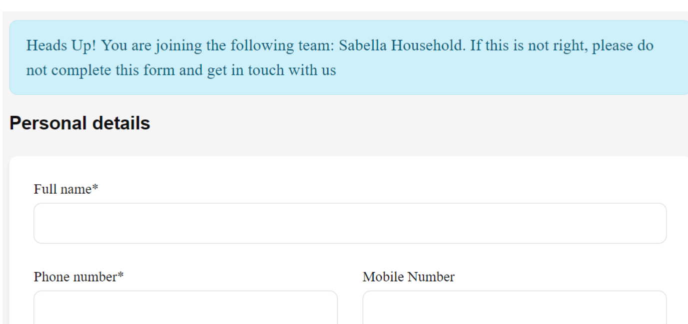
26. Check the "Disable sign-up links once the team has …" box and change the number to the correct limit based on the Primary Member's Membership

    a. Primary has a Maker Level Membership: Limit = 2 (primary member + 1 add-on)
    b. Primary has a Professional Level Membership: Limit = 4 (primary member + 3 add-ons)
    c. Primary has a Entrepreneur Level Membership: Limit = 6 (primary member + 5 add-ons)

27. Click **Save Changes**
28. Go back to the **Details** tab. Find the **Invite Link (New Customer).** Click **Copy.**



29. Paste link into new Chrome window. This will provide a signup link for the Add-On member.
30. Have the Add-On member fill out the signup information. (You should see a message at the top that says "Heads Up! You are joining the following team:...)
    a. If the member chose Individual Invoicing, they will need to put in payment information.



31. Click **Continue** (It skips the "choose a plan" window, and have them skip the purchase add-on window)
32. Have them continue through until they can click **Access Your Account**

33. Go to the Primary Account Holder's **Team** and refresh. You should now see the Add-on under the list of **Members**.

34. If they chose Individual Invoicing, you are done! Congratulations! If they chose Merged Invoicing, please continue.
35. Go to the Add-on Member's Account and click **Sales**—> **Contracts**
36. Check the tick box next to the new contract
37. On the bulk actions menu, click **Create Invoice**
38. Click Yes, Do it
39. Then go to the Primary Member's Account and click **Sales —> Other Charges**
40. Click the **…** menu to the right of the Contract
41. Click **Charge Invoice.** This will push the invoice to be charged instantly.
42. In the Primary Member's account, go to **Invoices.** You will see the newly pushed invoices listed.
43. If they are Paid, you are done. If they still say Due, click the … menu to the right and click **Pay by Card.**
44. Congratulations! They're set up! Now move on to Signing the Liability Waiver. All members, even Add-Ons, must sign the Waiver, get a FOB and go through the Onboarding and Orientation.

~~Student Membership~~

~~Is the sign-up for a new member, or an existing member who is changing their membership? Follow the appropriate steps.~~

~~**New Member**~~

1. ~~Start by clicking the link below https://lowellmakes.spaces.nexudus.com/en/signup/priceplan/73f9114c-c72e-4441-92cd-a1e85b66633e~~
2. ~~Have the member fill out their information~~
3. ~~Click Continue~~
4. ~~On the next page, have them check the Terms and Conditions checkbox. CLICK JOIN~~
5. ~~Do not have them add any Add-Ons at this time. They can add storage by talking to SpaceCom or the shop captains~~
6. ~~Click CONTINUE~~

7. ~~Put in payment information. Card will stay on file for future payments~~
8. ~~Move on to Assigning them a FOB~~

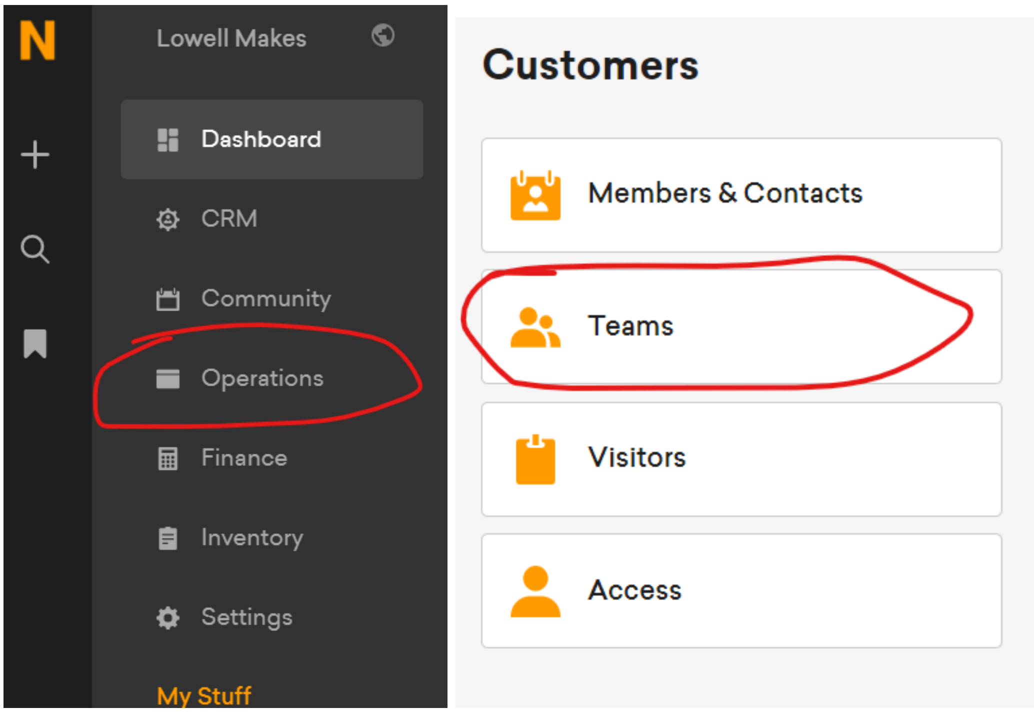
~~Existing Member (changing their membership to student):~~

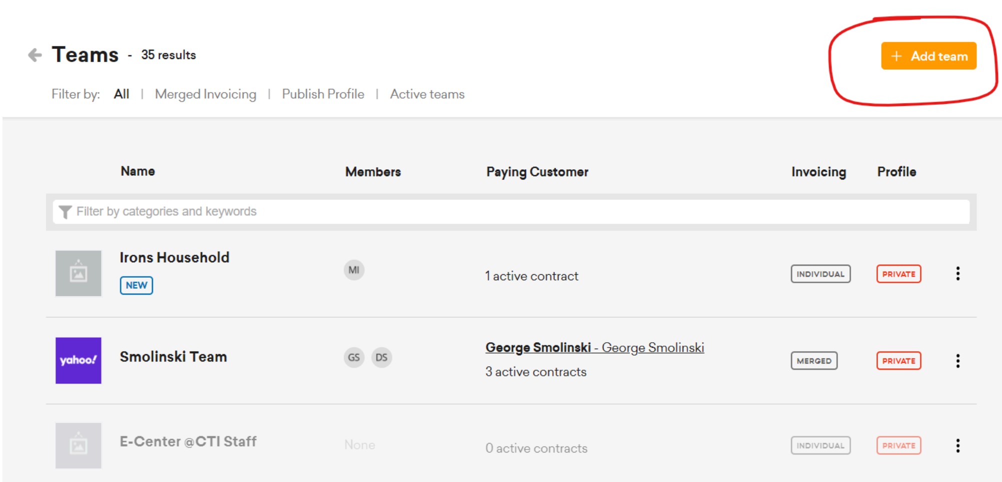
1. ~~Click the link below~~
   ~~https://lowellmakes.spaces.nexudus.com/login?returnurl=/en/signup/priceplan/73f9114c-c72e-4441-92cd-a1e85b66633e~~

2. ~~Have the member log into their account~~
3. ~~Have them change any personal information if needed~~
4. ~~Click Continue~~
5. ~~On the next page, have them check the Terms and Conditions checkbox. CLICK JOIN~~
6. ~~Do not have them add any Add-Ons at this time. They can add storage by talking to SpaceCom or the shop captains~~
7. ~~Click CONTINUE~~
8. ~~Put in payment information. Card will stay on file for future payments~~
9. ~~Move on to Assigning them a FOB~~

~~Creating a Team (For reasons other than Add-Ons)~~

1. ~~Log in to the admin platform of Nexudus Nexudus at platform.nexudus.com~~
2. ~~Go to Operations > Teams > Add New > Enter Team Name > Save~~





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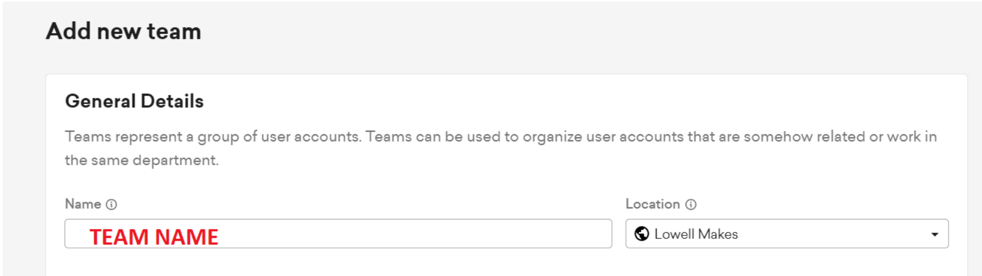
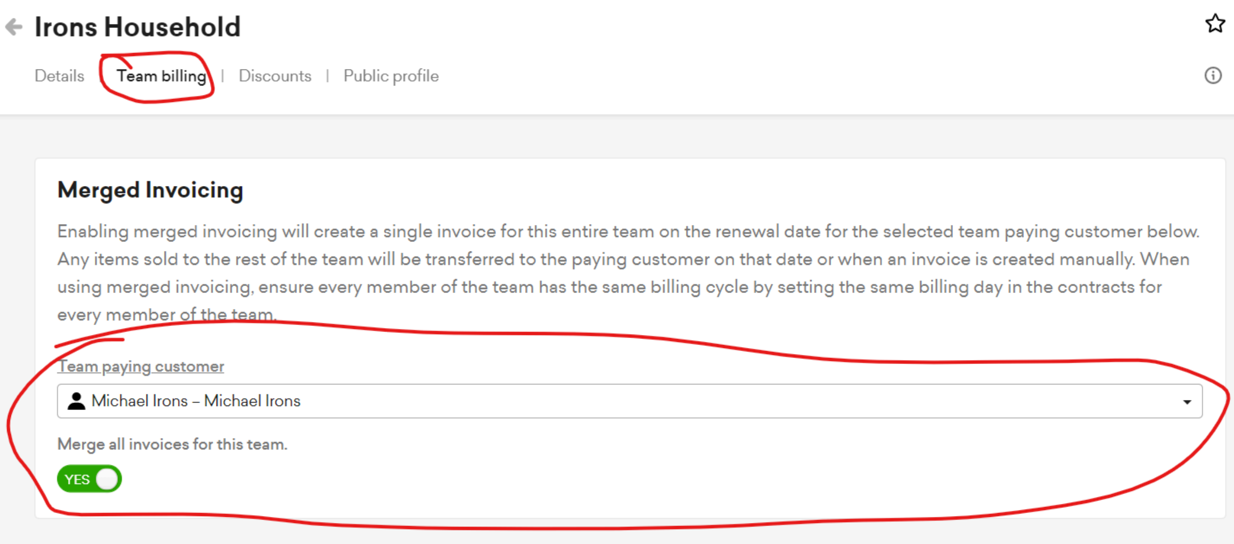


3. ~~After creating the team, go back to the Teams page, and click on the team you just created~~

~~The billing for the Team can work two ways~~

1) ~~Everyone in the team can pay their own invoices~~
    a) ~~Make sure 'Merge All Invoices' is set to No > Save Changes~~
2) ~~The head of the team can pay for all of the Invoices for everyone in their team~~
    a) ~~Go to Team Billing > Select Paying Customer > Switch 'Merge All Invoices' to Yes > Save Changes~~



~~Adding People to a Team, Household, Student Membership or SLA (Plans not available for the member to self select)~~

1. ~~Have the new member create an account but **DO NOT SELECT A PLAN**~~
2. ~~**If they are joining a team,** find out which team and if the team lead will be paying for their membership. Teams are located in Nexudus under Operations. Add their account to the team and check the team payment settings.~~

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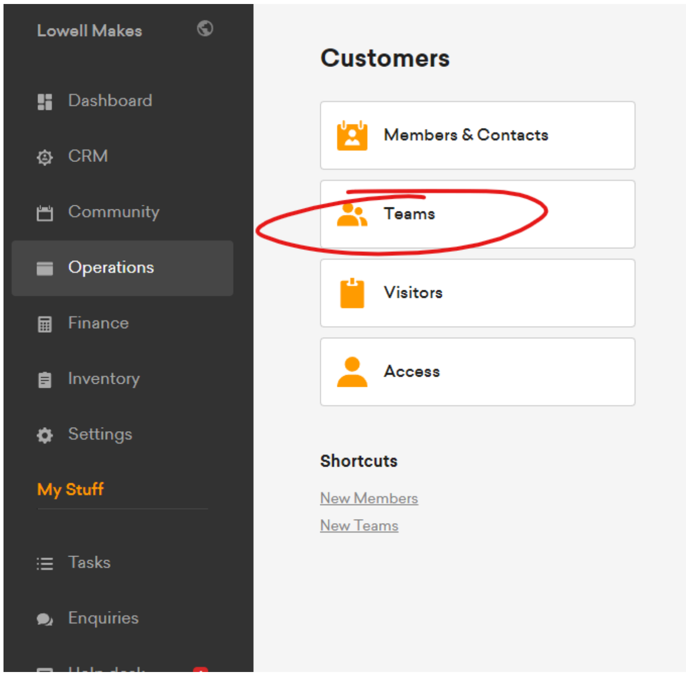


3. ~~On the Admin side of Nexudus~~
    a. ~~Go to the CRM page. Select Proposals (under the Opportunities header).~~
    b. ~~On the top right of the page, select "Add Proposal"~~
    c. ~~Fill out the information for the person~~
    d. ~~Set yourself as the "Responsible" person~~
    e. ~~Select the person in the customer drop down~~
    f. ~~Select the Plan: Add-on or Student plan as a SUBSCRIPTION~~
    g. ~~Edit start date if needed~~
    h. ~~Hit Save~~
4. ~~Back on the proposal page, find the person you just created a proposal for. Click the three dot menu on the right side of the person's line.~~
5. ~~Select "Send Proposal"~~
6. **~~This will email the person an invite to join the membership level. This is the preferred method since it requires the member to select YES they want it, rather than us assigning it from the backend.~~**

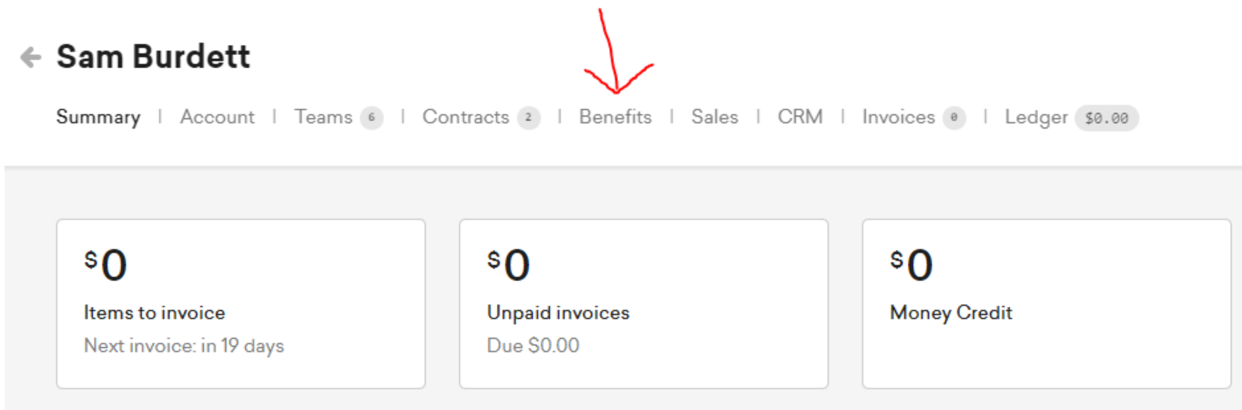
~~This process can also be used to set up new SLA's.~~

~~Gift Cards, Discount Codes~~

~~Gift cards can be purchased through our Square terminal at the space OR through our website at https://checkout.square.site/buy/PZGLNVU3GJJS3VMTO5TTNBWO~~

~~When a new member comes in with a gift card, here is what to do:~~

1) ~~Have the member create an account but DO NOT SELECT A PLAN~~
2) ~~On the admin side, go to to the user's account~~
   ~~-Sam Burdett used for example~~
3) ~~Go to Benefits~~



4) ~~Click Discounts~~
5) ~~+ Add discount~~
6) ~~Type in the discount code and hit save.~~
7) ~~Then have the member log in with to their account and sign up for a membership. It will pull their payments from the credit applied by the discount before charging their card.~~

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