My Gym Management
User Manual

Getting Started

- **Admin Setup**
    - o Location Setup
        - ▪ Location Setup
            - • Review each section. Enter any missing information or revise where necessary.
        - ▪ Merchant Account
            - • Confirm information with Versatalis' account statement or current Merchant Provider.
        - ▪ Fees Setup
            - • Review each section. Enter any missing information or revise where necessary.
        - ▪ System User Setup
            - • No actions required
        - ▪ Teacher Setup
            - • Add and manage your staff.
            - • Assign ID numbers using the last 4 digits of their social security numbers.
        - ▪ Exact Target Setup
            - • Log in to your Exact Target account.
            - • Go to your Admin section; locate and note the Account ID. This should be a 5-digit number.
            - • Go to your Subscribers section; select My Lists.
            - • Put a check in the box next to the list you would like MGM to update.
            - • Click Properties on the top menu.
            - • Note the ID number, which should be a 7-digit number.
            - • Ensure that the Public box is checked under List Attributes.
            - • Enter the two ID numbers in their appropriate fields in the MGM.
        - ▪ Payment Agreement Customization
            - • Add any location specific information you want included in the Membership Agreement.
        - ▪ Add/Edit Skipped Days/Weeks.

- Add or Edit any days or weeks you do not want counted in recurring billing. (i.e., holidays where the gym is closed)
  - Add/Edit Announcements to all Receipts.
    - Add or Edit any text you wish to appear at the bottom of receipts.
  - Edit your "How Did You Hear About US?"
    - Add or Edit a list of marketing avenues and efforts.
- Classes
  - View / Edit Class Schedule
    - Create or modify class schedule.
  - Add Class to Schedule.
    - Use this section to add a new class to the schedule. This can also be done on View / Edit Class Schedule.
  - Set Unlimited Class Dates.
    - Use this section to set a period of time when customers can attend unlimited classes.
    - Note: All students must be set as unlimited or not. You are not able to have some on unlimited and some off.
- Parties
  - Time Slots and Options
    - Add Birthday time slots.
    - Set the number of days you wish the hold to exist.
    - Enable an auto-email to be sent when a hold is released.
    - Enter a minimum number of minutes between parties.
    - Choose to either include a tip line or not for receipts.
    - See notes and directives at the bottom of the screen.
  - Party Calendar
    - Click "Available" on any party slot you wish to block.
  - Set up Party Pricing, Packages, and Add-ons.
    - Build your party packages.
    - Set default deposit amount.
    - Add Add-ons with price.
    - Select taxable, if applicable.
  - Add Party Rules and Policies.
    - Anything typed in the text box will be included on the Birthday Confirmation Receipt along with default policies.
- Camps/PNO
  - Create new Camp/Event Type Template.
    - Use to create a standard event to be used as a template for future placement on Calendar.
  - Edit Default Camp/Event Template.
    - Use to modify standard event templates.
  - Add Camp/Event to Schedule.
    - Use to add one or more camp/event to the Calendar.
  - View/Edit Camp/Event Schedule.
    - Modify the Calendar.
- Employee Timesheets
  - Edit Timesheets if a staff member forgets to log in or out.
  - View/print a timesheet report.
- PSP Management

- PSP Administration
  - Set monthly team goals.
  - Choose to show team goals, party bonus structure, and camp bonus structures on the main PSP screen.
  - Set individuals' quotas, GABs, IEBs, and other bonuses.
- PSP Staff Report
  - View a year to date report for each staff member.
- PSP Assign Leads
  - Locate leads and assign to specific staff member.
- PSP Staff Management
  - Similar view to PSP Administration, but also allows you to reassign bonuses from one staff member to another

Home Page Overview

- **Recently Viewed Customers**
  - This dropdown shows the past 10 customers worked on or viewed.
  - This number can be changed in the Location Setup of the Admin Options.

- **Begin Typing**
  - This section is used to search for parents or children within the database.
  - Select 1 of the 3 categories and begin typing. Then click Submit.

- **Add New Customer**
  - Use this button to enter a new customer.

- **Jump to Class**
  - Use this dropdown to quickly access a specific attendance sheet.

- **Staff Time Clock**
  - Staff can log in and out using their assigned ID numbers.
  - See Getting Started/Admin Setup for specifics.

- **Reminders/Message Center**
  - Use to leave messages and reminders for staff.

- **Home Page Data**
  - Click on the Total Current Paid Enrollments to access the Statistical Reports.

- **Description of Buttons**
  - Class Attendance
    - Click to access the next scheduled attendance screen.
    - Use arrows or Select Class dropdown to access other class attendance screens.
    - Click on dates to view attendance screens for future and past classes.
  - Birthday Parties

- Click to access current month's party schedule.
- Click Book to schedule a party.
- Click on the child's name to access that party's information.
- A red check indicates the party has been confirmed.
    - o Camps & PNOs
        - Click to access current month's schedule.
        - Use arrows to maneuver between months.
    - o Guest Follow-Up
        - Click to display a list of scheduled guests as per the date range on the top of the screen.
        - Use this list daily to contact and confirm guest classes.
        - Use the Result dropdown; Contact 1 and 2 and the Notes field to log information.
    - o Manage Transactions
        - Click to view a list of transactions that were processed through the MGM including CC, Cash, and Checks.
        - Use the Select Transaction Date to narrow your search to a specific date range.
    - o Class Schedule
        - Click to view your class schedule including the number of children enrolled in each class.
    - o PSP Operations
        - Click to view Team Goals.
        - Click a staff member's name to view his/her individual information, including assigned leads, quotas, credits, goals, enrollments, and bonuses.
    - o Statistical Reports
        - Click to see a breakdown of the gym's current status.
        - Use the Date Range to find statistical information for a given timeframe.
    - o Admin Options
        - Password protected and used to set pricing, options, etc.
        - See Getting Started.
    - o View Recurring Payments.
        - This screen is used to process recurring payments.
        - See Run Recurring Payments in the Everyday Tasks Bookmark for more details.

Birthday Party Package Setup

- Fee Setup
    - o From the Home Page, go to Admin Options
    - o Click Fee Setup and enter your state's sales tax
    - o Click Save

- Party Package Options
    - o From the Home Page, go to Admin Options
    - o Click Parties
    - o Click Birthday Party Package Add-Ons
    - o Under Party Packages, create the packages you offer
    - o Set your Party Deposit Amount

- o Under Add-Ons and Upgrades, add any and all options
  - ▪ Check the Taxable box for any items to which you want tax added
  - ▪ For any items included in the package at no additional costs, set the price as $0.00
  - o Click Save

- Add Birthday Rules / Policies (optional)
  - o From the Home Page, go to Admin Options
  - o Click Parties
  - o Click Add Birthday Rules / Policies
  - o Edit or add any rules or policies that are applicable
  - o Click Save

PSP Setup for MGM

- Set up
  - o From the Home Page, go to Admin Options
  - o Click PSP Management
  - o Click PSP Admin
  - o Set the Monthly Enrollment Goal for the current month
  - o Set the Monthly Enrollment Goal for the next month if it has already been determined
  - o Repeat the above steps for the Monthly Party Goals if applicable
  - o Choose Y or N to have the Team Enrollment Goal Bonus and Team Party Goal Bonus appear on the staff PSP page
  - o Click Update Team Goals

- Next, setup each staff members Individual Staff Goal Settings
  - o Begin by clicking on the first staff member on the list
  - o Set the Guest Quota if applicable
  - o Set the GAB Bonus #1 and #2
    - ▪ If you are using the standard 2-6 format: GAB 1 should be set at $2 and GAB 2 should be set at $6
  - o Set the Enrollment Quota if applicable
  - o Set the IEB Bonus #1 and #2
    - ▪ If you are using the standard 2-6 format: IEB 1 should be set at $2 and IEB 2 should be set at $6
  - o Set the Camp Quota and Enroll Bonus is applicable.
  - o If applicable, set the Party Booking Bonus, Upgrade Bonuses and Add on Bonuses as previously determined
  - o Lastly, set the Monthly Team Enrollment Goal Bonus and Team Party Goal Bonus
  - o Click Update Staff Goals.
  - o Repeat these steps for each staff member

- Staff Notes:
  - o The staff will have access to the PSP Operations screen from the home page
  - o From this screen they will be able to see the current numbers for each month and access their staff management screen
  - o From the staff management screen, each staff member can review their current numbers and access their lead list to make updates

- o When entering a new child, it is important to assign the lead to the appropriate staff member
- o When enrolling a child, it is important to use the Enrolled by drop down so the appropriate staff member receives credit.

Everyday Tasks

- **Enroll a Child**
  - o This must begin from the Edit Family screen.
  - o Do a search for the child or click Add New Customer to access this screen.
  - o Ensure the child's name is listed at the bottom of the screen below Students. If not, click Add New.
  - o Next to the child's name, click Enroll in Class.
  - o Use the dropdown to select the desired class. If the desired class is not shown, use the 6 Months Younger or 6 Months Older button to locate it.
  - o Select the Start Date.
  - o Click Proceed to Payments.
  - o Ensure the total amount is accurate and select a method of payment. Then click Continue.
  - o Choose Edit Recurring to make changes to the recurring billing cycle, print receipt, or close window.

- **Book a Guest Class**
  - o This must begin from the Edit Family screen.
  - o Do a search for the child or click Add New Customer to access this screen.
  - o Ensure the child's name is listed at the bottom of the screen below Students. If not, click Add New.
  - o Next to the child's name, click Guest Class.
  - o Select the appropriate class and date.

- **Schedule a Make-Up**
  - o Access the Attendance screen of the class in which child is enrolled.
  - o Click on the MU icon next to the child's name.
  - o Select the class desired for the make-up. Select the date and click Schedule.
  - o If an MU icon is not present, the child is not owed any make-ups.
  - o To schedule a make-up for a class they will miss in the future, go to the future week's attendance screen and mark the child absent. This will produce an MU icon.

- **Book a Party**
  - o Do a search for the child or click Add New Customer to access this screen.
  - o Ensure the child's name is listed at the bottom of the Edit Family screen below Students. If not, click Add New.
  - o Next to the child's name, click Book a Party.
  - o Click Book on the appropriate date and time.
  - o The Party Children field is used to list any other children who will be sharing the party.
  - o Select the party package and any add-ons or upgrades.

- o   Click Book Party.

- **Hold a Party**
  - o   Do a search for the child or click Add New Customer to access this screen.
  - o   Ensure the child's name is listed at the bottom of the Edit Family screen below Students. If not, click Add New.
  - o   Next to the child's name, click Book a Party.
  - o   Click Book on the appropriate date and time.
  - o   The Party Children field is to list other children who will be sharing the party.
  - o   Select the party package and any add-ons or upgrades.
  - o   Click Hold a Party.

- **Run Recurring Payments**
  - o   Click on View Recurring Payments on the home screen.
  - o   This screen shows everyone who is scheduled to be billed as of the current day.
  - o   Select a method of payment. If CC is not an option, no CC is on file.

- **Take Attendance**
  - o   Access the desired attendance screen.
  - o   Click the radial button under Present or Absent.
  - o   Click All to mark the entire list Present or Absent.

- **Add a Child to a Waitlist**
  - o   Do a search for the child or click Add New Customer to access this screen.
  - o   Ensure the child's name is listed at the bottom of the screen below Students. If not, click Add New.
  - o   Next to the child's name, click Enroll in Class.
  - o   Use the dropdown to select the desired class. If the desired class is not shown, use the 6 Months Younger or 6 Months Older button to locate it.
  - o   Select the Start Date.
  - o   Click Waiting List.

- **Reserve a Spot For a Child in a Class**
  - o   Do a search for the child or click Add New Customer to access this screen.
  - o   Ensure the child's name is listed at the bottom of the screen below Students. If not, click Add New.
  - o   Next to the child's name, click Enroll in Class.
  - o   Use the dropdown to select the desired class. If the desired class is not shown, use the 6 Months Younger or 6 Months Older button to locate it.
  - o   Select the Start Date.
  - o   Click Reserve.

- **Take a Quick Payment**
  - o   This can be done from the Edit Family screen or Attendance screen.
  - o   Click the Green $ sign next to the child's name.
  - o   Enter a description and the amount, and then click Next.
  - o   Select the method of payment and click Continue.
  - o   Print the receipt or close the window.

- **Switch Classes**
  - From the child's current attendance screen, click the two green arrow icons to the left of the child's name.
  - Select the new class and corresponding dates regarding the switch.

- **Enter a Cancellation**
  - From the child's current attendance screen, click the red X icon to the left of the child's name.
  - Select the child's last class date or choose to remove the child immediately.
  - Select the No Payment Owed box, if applicable.
    - If this box is not checked, the student will be billed one final payment.