

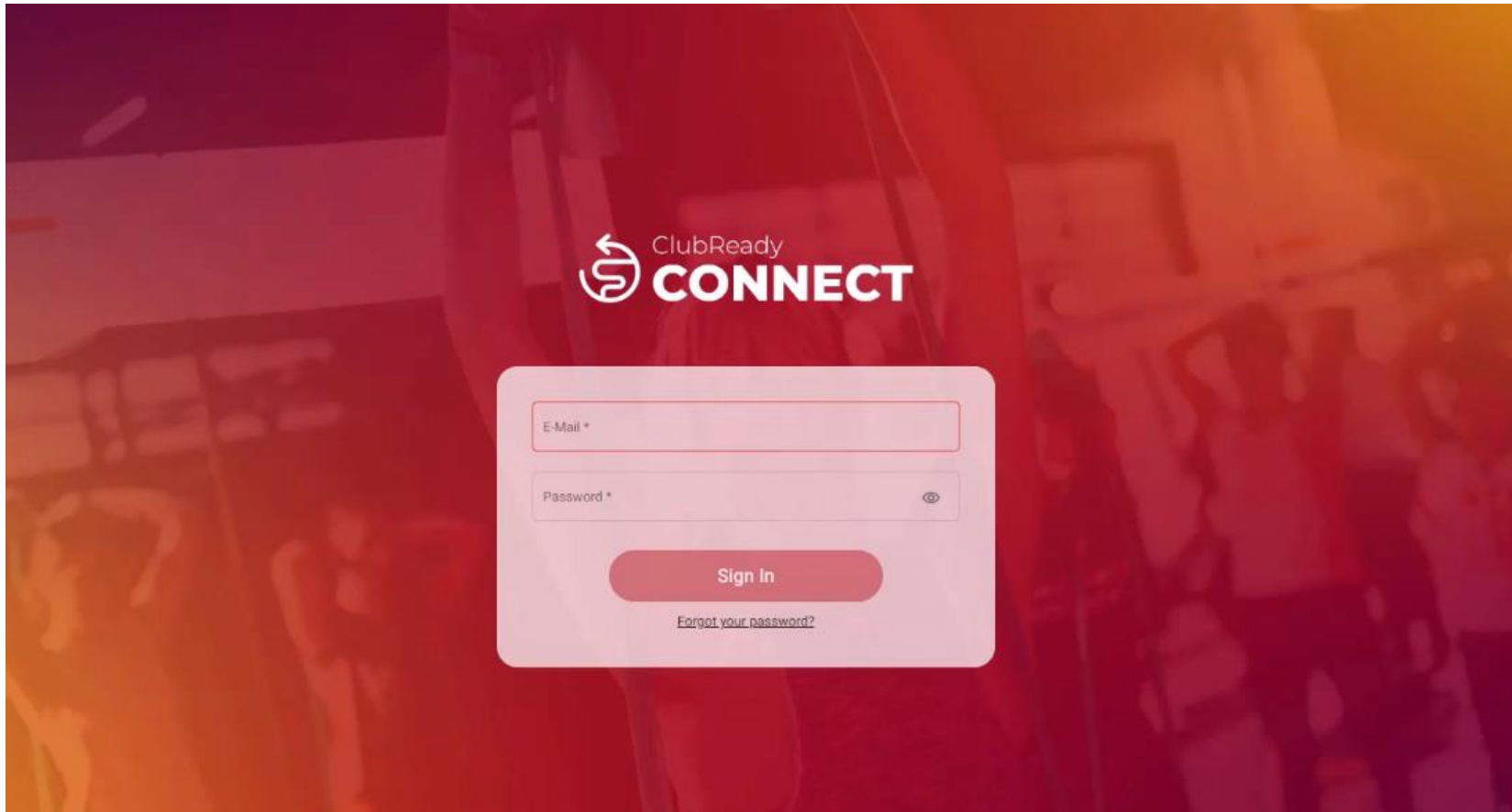


ClubReady Connect

User Guide

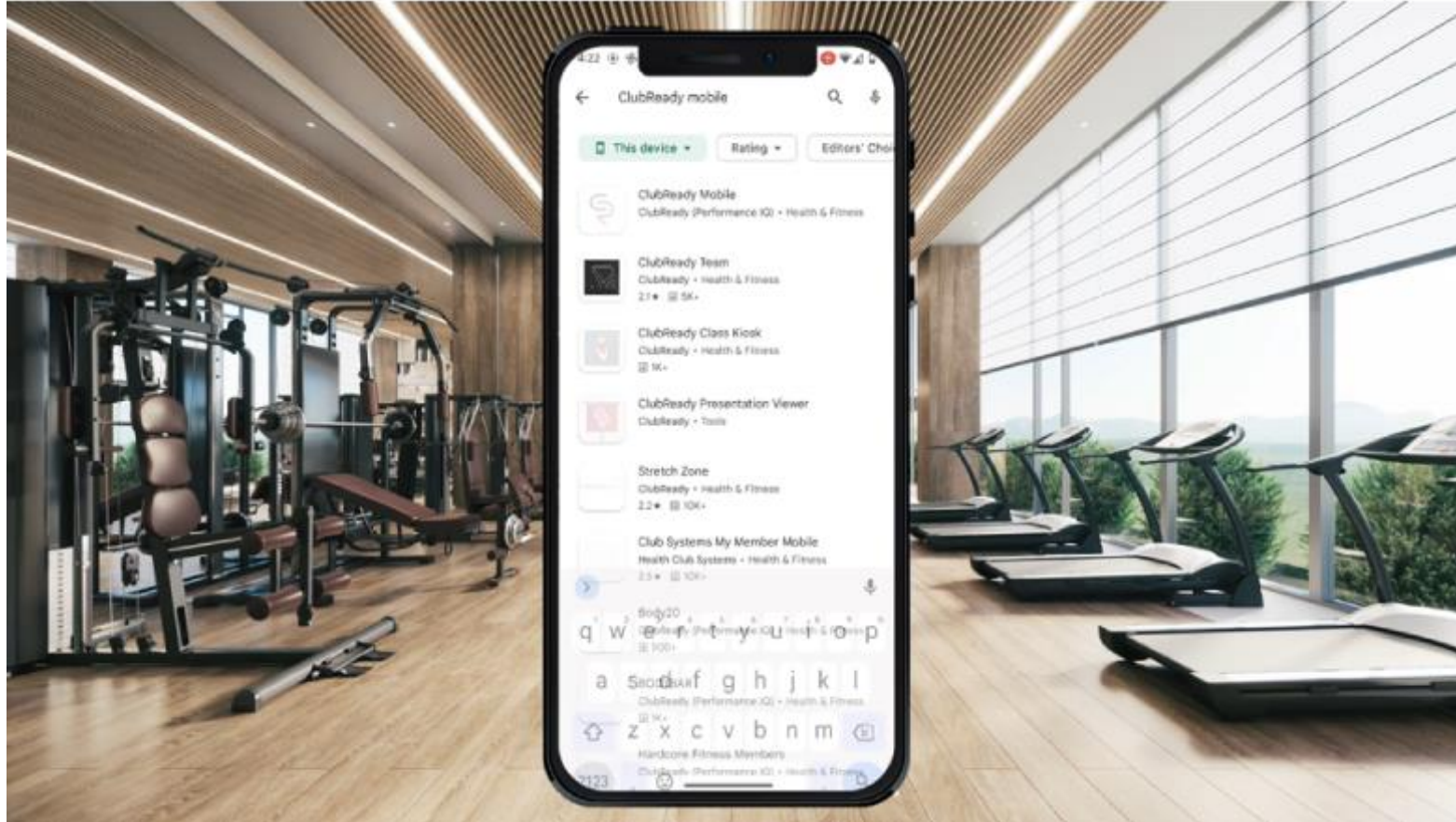
ClubReady Connect Demo

- Click image to view!



ClubReady Connect Mobile App Demo

- Click image to view!





Key Setup Checklist

Review this list to confirm key settings in your site are setup and correct

Follow these steps!

1

- **Manage Permissions**
- Connect > Manage Roles & Permissions
- <https://crconnect.zendesk.com/hc/en-us/articles/21254870265229-Adding-Editing-Permissions->



2

- **Create Staff Profile**
- Connect > Manage Staff
- <https://crconnect.zendesk.com/hc/en-us/articles/13145549225229-Add-New-Staff>
- Only create individual logins for staff that need access prior to integration being on.



3

- **Create Campaigns/Conversation Templates**
- Connect > Manage Locations > Manage Templates
- <https://crconnect.zendesk.com/hc/en-us/articles/18129546935821-Add-Edit-Templates>



4

- **Create Reminder & Follow Up Templates**
- Connect > Manage Locations > Manage Templates
- <https://crconnect.zendesk.com/hc/en-us/articles/13145372670221-Creating-a-Reminder-Follow-Up-Template>



Follow these steps!

5

- Check Clients & Prospects are all in the site
- Connect > Clients & Prospects



6

- Verify your Classes are pulling in correctly
- Connect > Class Calendar



Initial Login: Primary Account Admin

- Welcome email will be sent with login credentials.
- If email has not been received:
 - Check junk/spam folder
 - Subject: ClubReady Connect Login Credential
 - Email Support to resend

Welcome to ClubReady Connect, {USER_NAME}

Your ClubReady Connect account is ready to use and your login credentials are below! We want to make sure you have the most success utilizing ClubReady Connect for your texting communications! To get started right away, use our [Online Guide to ClubReady Connect](#) to access training tools and sign up for a live virtual webinar. We are here to help, if you need support, please reach out to support@clubready.com.

Here are your login credentials:

Website: [ClubReady Connect](#)

Email: {EMAIL}

Password: {PASSWORD}

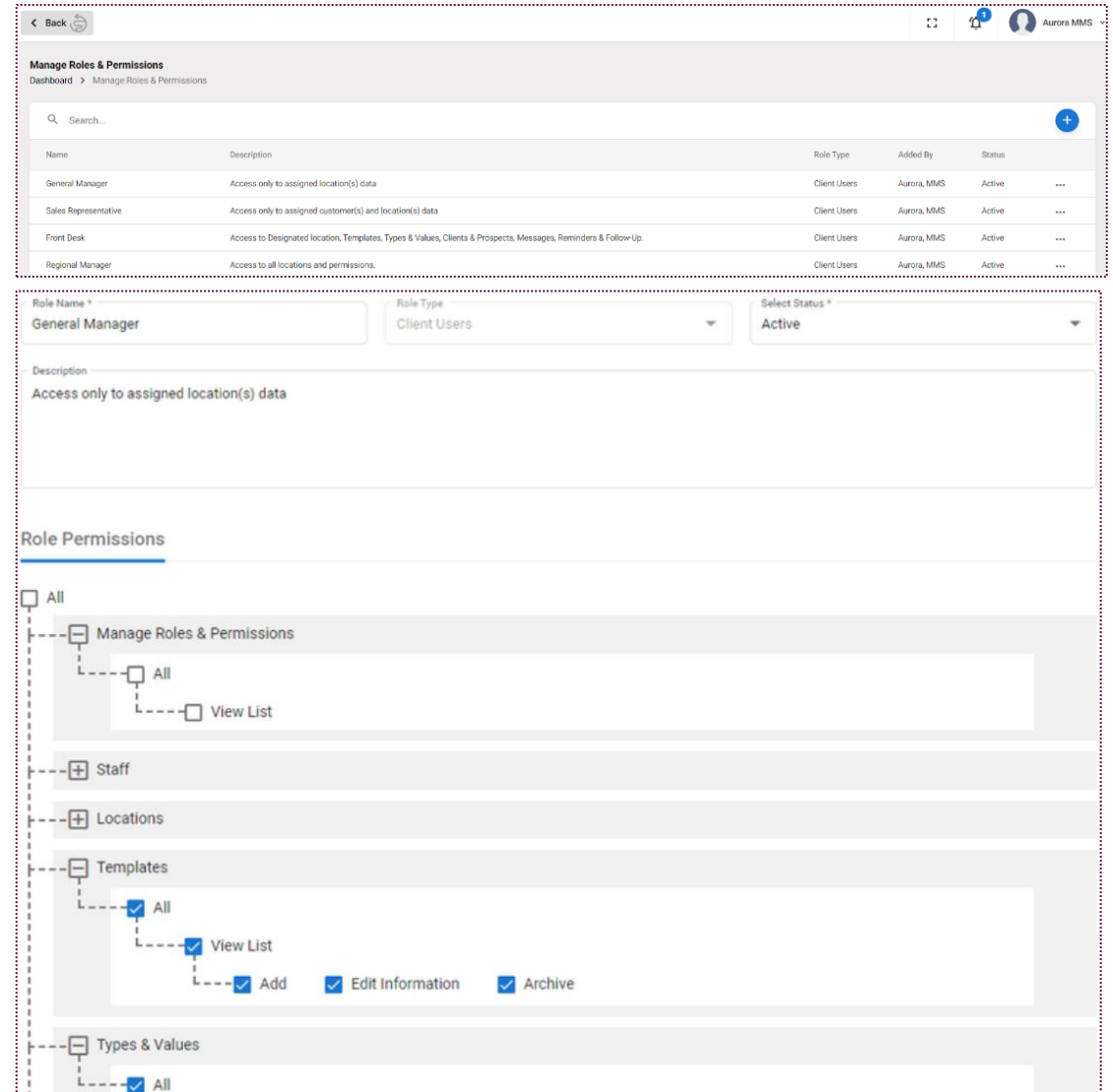
We hope you enjoy ClubReady Connect and look forward to our continued partnership.

Initial Login: Primary Account Admin

- Primary Account Admin
 - Access to all locations you operate
 - Access to all functionalities
 - Access to create new staff profiles
 - Access to create new templates

Setup Permissions

- Primary Account Admin will want to review permission setup for the different staff roles.
- Review Connect's Default Role
 - Decide if you want to adjust.
- Add/edit permissions in Connect > Manage Roles & Permissions.



Manage Roles & Permissions
Dashboard > Manage Roles & Permissions

Search...

| Name | Description | Role Type | Added By | Status |
|----------------------|-----------------------------------------------------------------------------------------------------------------|--------------|-------------|--------|
| General Manager | Access only to assigned location(s) data | Client Users | Aurora, MMS | Active |
| Sales Representative | Access only to assigned customer(s) and location(s) data | Client Users | Aurora, MMS | Active |
| Front Desk | Access to Designated location, Templates, Types & Values, Clients & Prospects, Messages, Reminders & Follow-Up. | Client Users | Aurora, MMS | Active |
| Regional Manager | Access to all locations and permissions. | Client Users | Aurora, MMS | Active |

Role Name *
General Manager

Role Type
Client Users

Select Status *
Active

Description
Access only to assigned location(s) data

Role Permissions

- All
 - Manage Roles & Permissions
 - All
 - View List
 - Staff
 - Locations
 - Templates
 - All
 - View List
 - Add
 - Edit Information
 - Archive
 - Types & Values
 - All

Initial Login: Another Admin Type (ex. GM)


- Primary Account Admin can create accounts to those staff who need to help with initial setup or have more permissions/access outside of Default Role.
 - If wanting all staff to have access prior to being able to message, you can create 1 login for all to use. Then, they can all use Single Sign On to create logins when migration is done and integration is on.
- Create account in Connect > Manage Staff.
 - Assign staff with Role (*Important for permissions/access*)

Manage Staff
Dashboard > Manage Staff

Search...

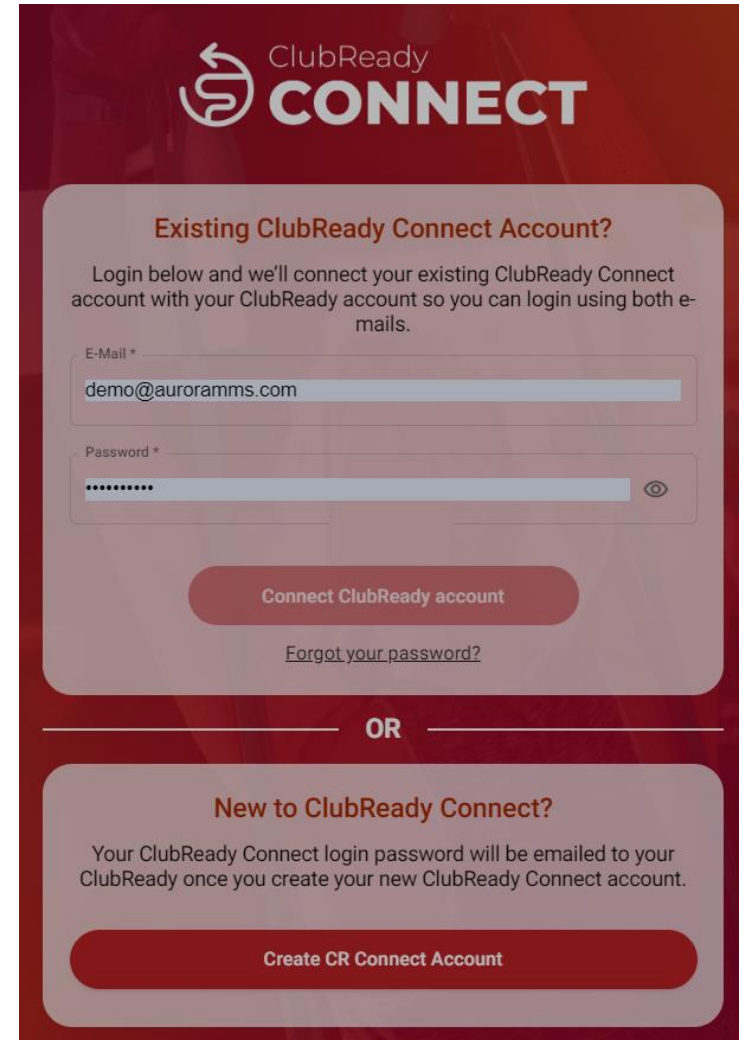
| Name | E-Mail | Phone | Location | Status | |
|--------------|----------------------|----------------|-------------------------|--------|-----|
| Cc, Cc | cc.cc@aurora.com | - | Aurora MMS,Aurora MMS 2 | Active | ... |
| Dobda, Chad | chad.dobda@gmail.com | (404) 713-0679 | Aurora MMS,Aurora MMS 2 | Active | ... |
| Joe, Trainer | joe@noemail.com | - | Aurora MMS,Aurora MMS 2 | Active | ... |
| Test, Cr | Test@Test.com | - | Aurora MMS,Aurora MMS 2 | Active | ... |

Items per page: 20 1 - 4 of 4 < >



Initial Login: All Other Staff

- For those staff not initially created in Connect, they can create their accounts automatically when you Go Live by accessing ClubReady Connect through Work It or the Connect Tab.
 - They will be automatically assigned to the Default Role in Connect. (*Their role can be adjusted in their Connect profile*).
- PLEASE NOTE:
 - If they have an account in CRC, staff will login using the top option "Existing ClubReady Connect Account".
 - If they do not have an account in CRC, staff will need to use the option at the bottom "Create CR Connect Account"



ClubReady
CONNECT

Existing ClubReady Connect Account?

Login below and we'll connect your existing ClubReady Connect account with your ClubReady account so you can login using both e-mails.

E-Mail *
demo@auroramms.com

Password *
.....

[Forgot your password?](#)

OR

New to ClubReady Connect?

Your ClubReady Connect login password will be emailed to your ClubReady once you create your new ClubReady Connect account.

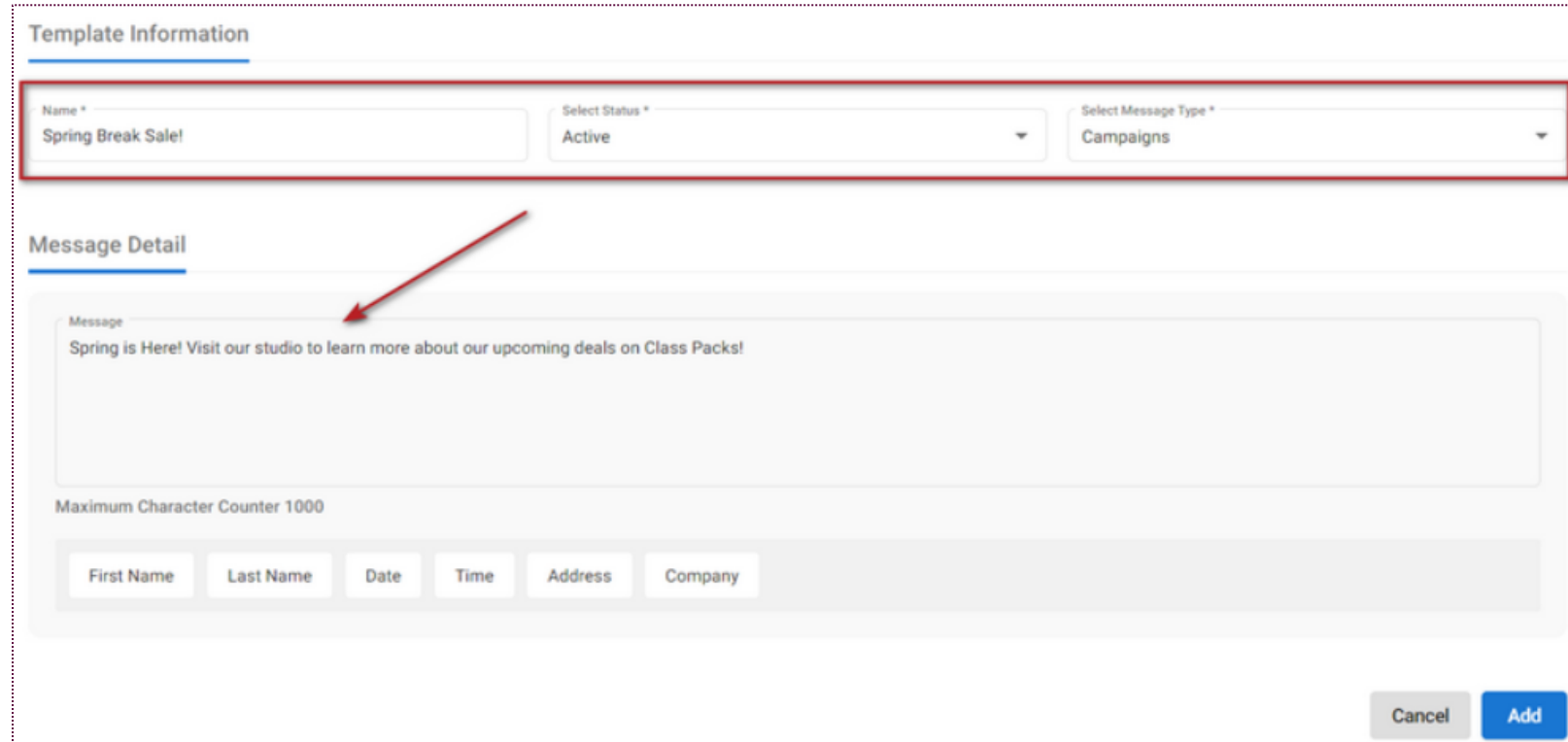
[Create CR Connect Account](#)

Create Campaign Templates

- Access Connect > Manage Locations "...> Manage Templates
 - Create templates per location
 - Pay extra attention to the template's Message Type.

HELPFUL TIPS:

- Beware of character count
- Include "opt out" message



Template Information

Name *
Spring Break Sale!

Select Status *
Active

Select Message Type *
Campaigns

Message Detail

Message
Spring is Here! Visit our studio to learn more about our upcoming deals on Class Packs!

Maximum Character Counter 1000

First Name Last Name Date Time Address Company

Cancel Add

Create Reminder & Follow Up Templates

- Access Connect > Manage Locations to start adding templates.
 - Pay extra attention to the template's Message Type.
 - I acknowledge that this is a Non Marketing template checkbox

Add Template

Dashboard > Manage Locations > Manage Templates > Add Template

Template Information

Name *

Select Status *

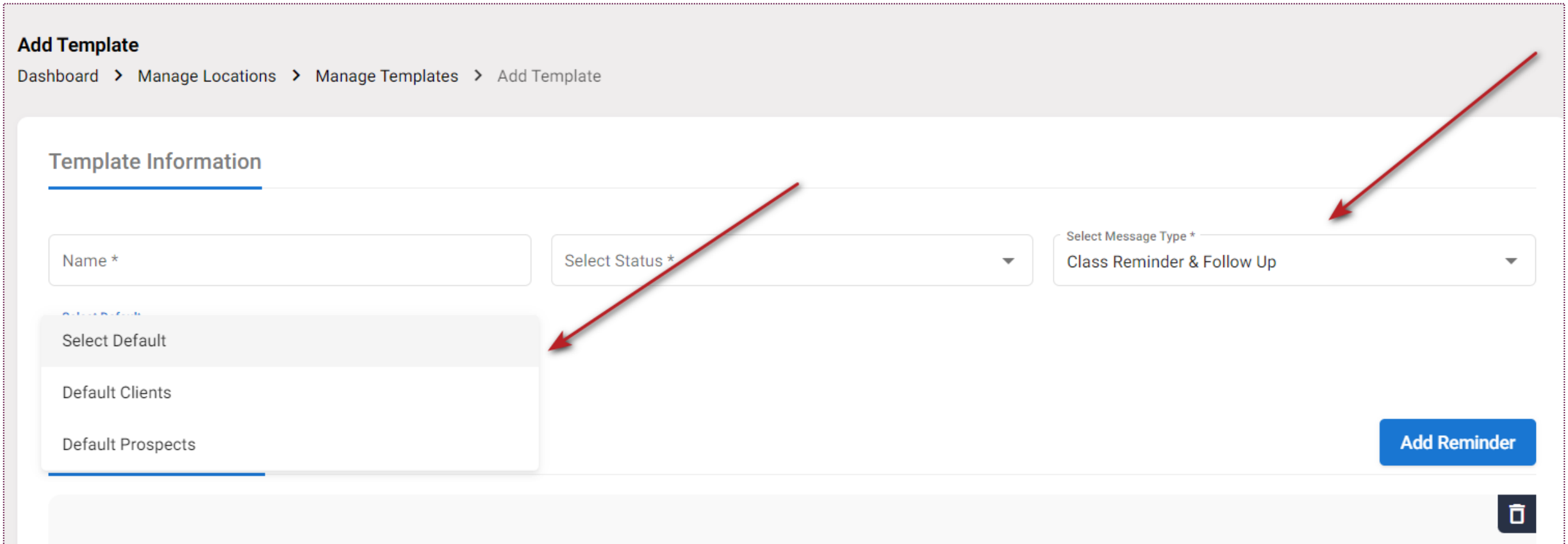
Select Message Type *
Class Reminder & Follow Up

Select Default

Default Clients

Default Prospects

Add Reminder

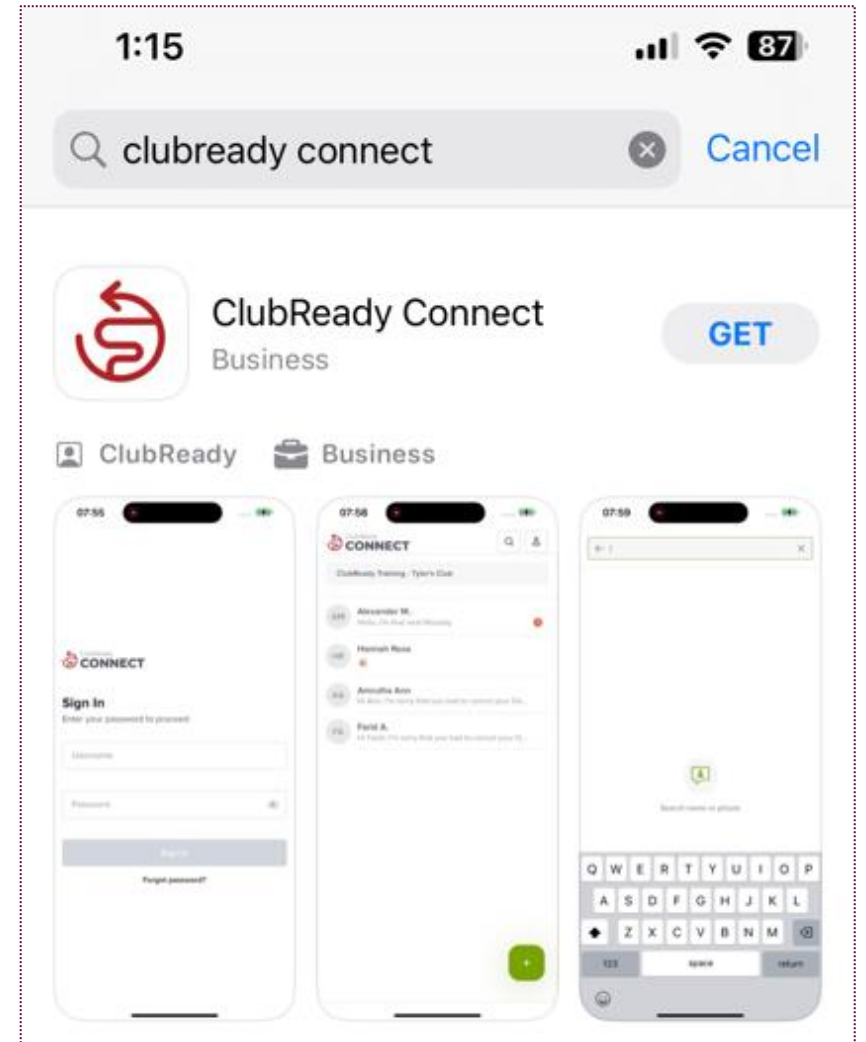




Using ClubReady Connect

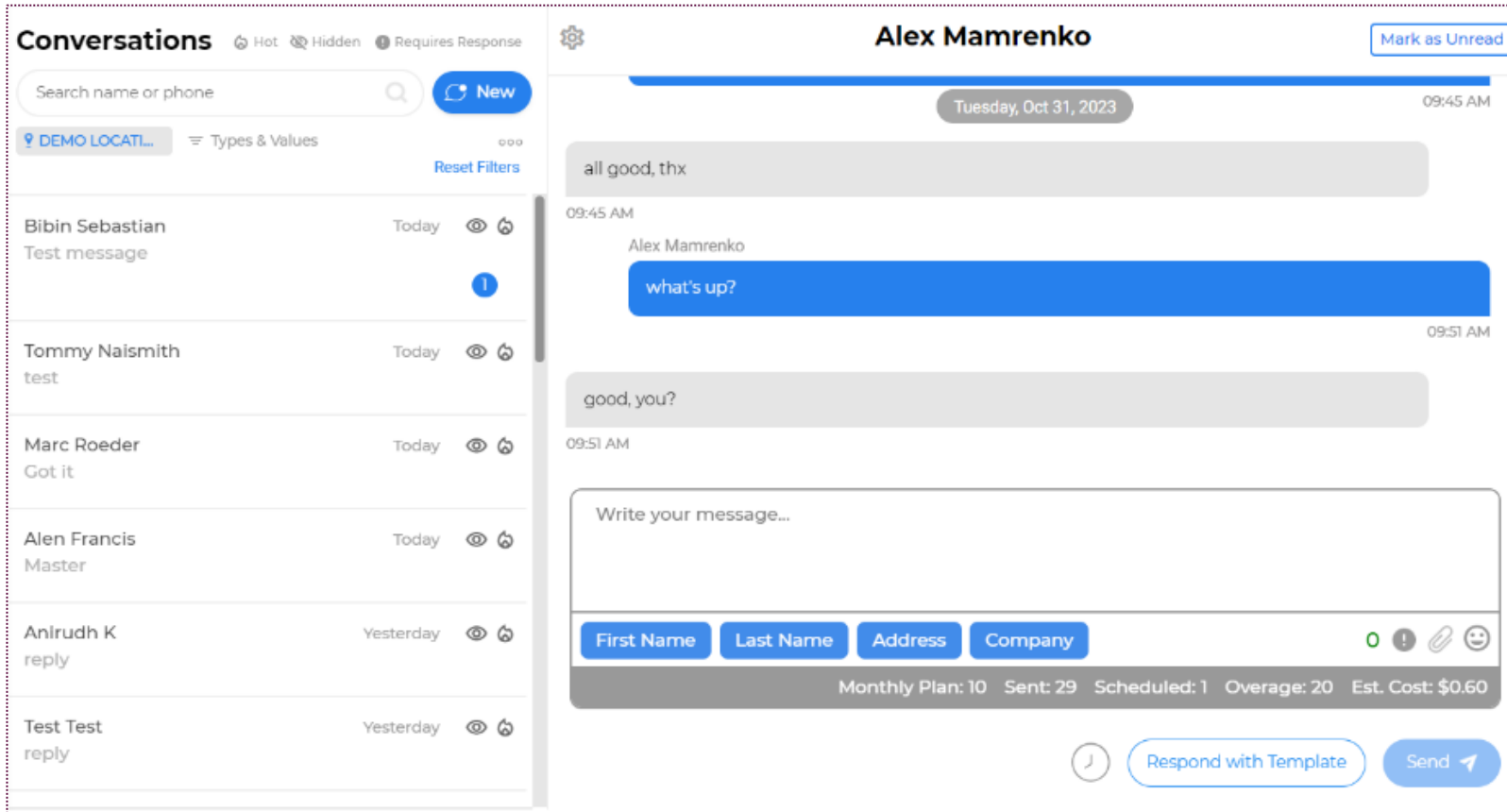
Download App

- Access our native app from your phone to communicate with your users.
 - Use your ClubReady username and password.
- Apple: <https://apps.apple.com/us/app/clubready-connect/id6466714275>
- Android: <https://play.google.com/store/apps/details?id=com.clubready.connect>



Send a Conversation

- Access Connect > Conversations to reach out 1:1 with your leads and members.



The screenshot displays the 'Conversations' interface. On the left, a list of contacts is shown with their names and recent messages. The main area shows a detailed view of a conversation with 'Alex Mamrenko' on 'Tuesday, Oct 31, 2023'. The conversation history includes messages from both parties. At the bottom, there is a text input field for sending a message, a template selection bar with options like 'First Name', 'Last Name', 'Address', and 'Company', and a 'Send' button. A status bar at the very bottom shows metrics: 'Monthly Plan: 10 Sent: 29 Scheduled: 1 Overage: 20 Est. Cost: \$0.60'.

Conversations Hot Hidden Requires Response

Search name or phone [New](#)

DEMO LOCATI... Types & Values [Reset Filters](#)

Bibin Sebastian Today Test message 1

Tommy Naismith Today test

Marc Roeder Today Got it

Alen Francis Today Master

Anirudh K Yesterday reply

Test Test Yesterday reply

Alex Mamrenko [Mark as Unread](#)

Tuesday, Oct 31, 2023 09:45 AM

all good, thx

09:45 AM

Alex Mamrenko

what's up?

09:51 AM

good, you?

09:51 AM

Write your message...

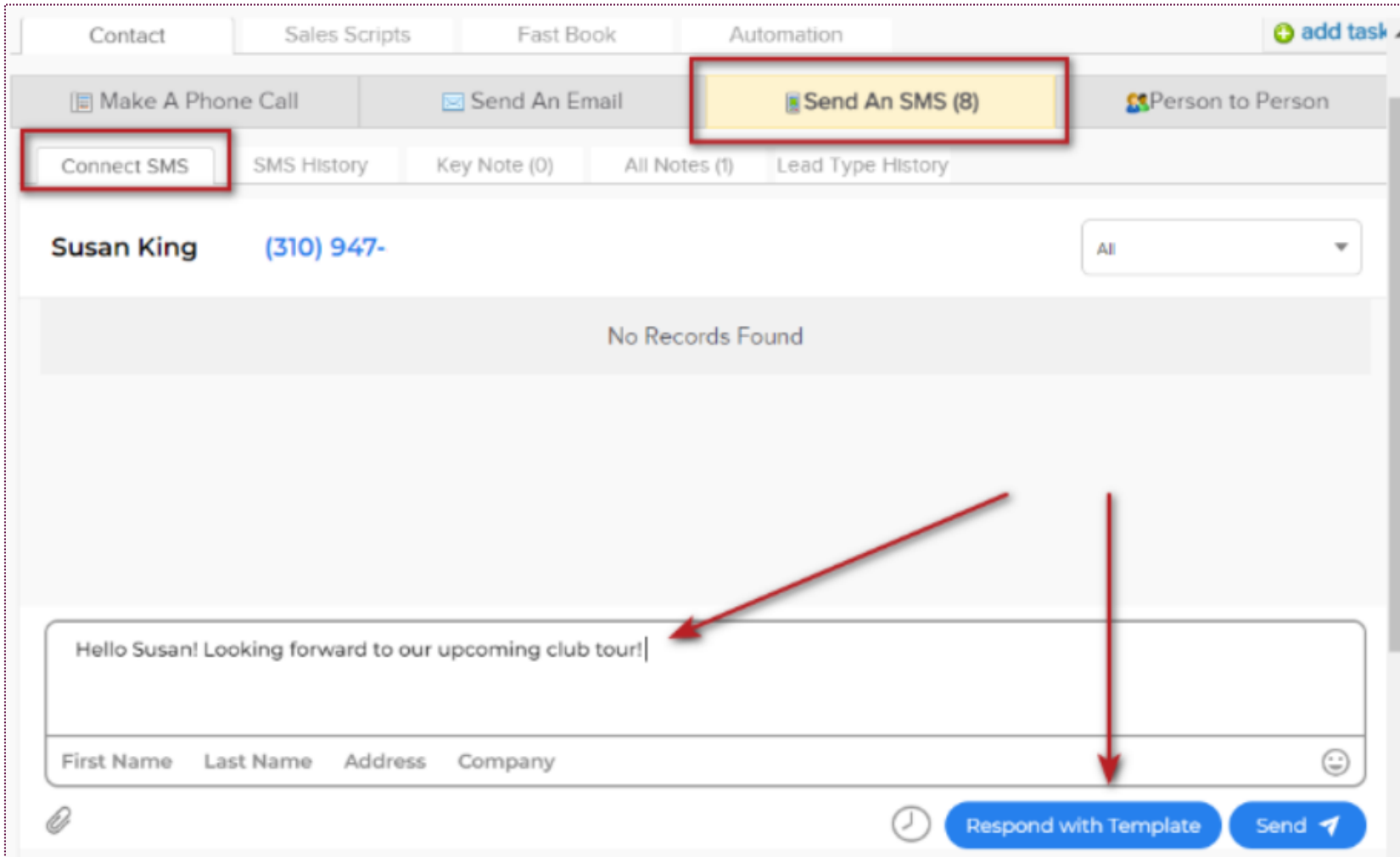
First Name Last Name Address Company

Monthly Plan: 10 Sent: 29 Scheduled: 1 Overage: 20 Est. Cost: \$0.60

[Respond with Template](#) [Send](#)

Send a Conversation through Work It

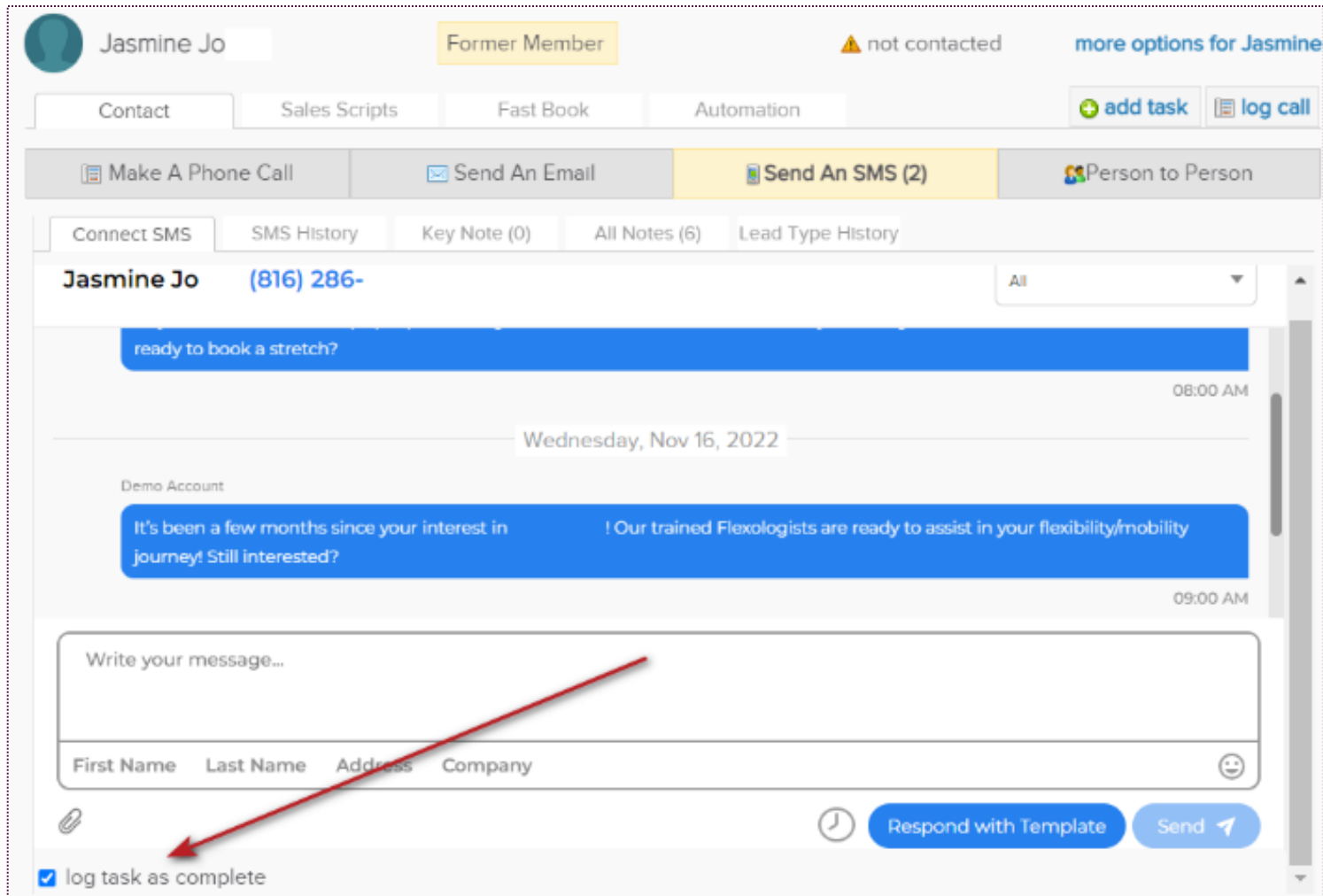
- Access ClubReady > Work It > use previously created templates



The screenshot displays the ClubReady 'Work It' interface for a contact named Susan King. The navigation tabs at the top include 'Contact', 'Sales Scripts', 'Fast Book', and 'Automation'. Under the 'Automation' tab, the 'Send An SMS (8)' option is highlighted with a red box. Below this, the 'Connect SMS' button is also highlighted with a red box. The contact's name 'Susan King' and phone number '(310) 947-' are visible. A dropdown menu is set to 'All'. A message box contains the text 'Hello Susan! Looking forward to our upcoming club tour!'. Below the message box, there are fields for 'First Name', 'Last Name', 'Address', and 'Company'. At the bottom, there are buttons for 'Respond with Template' and 'Send'.

Complete your Tasks

- Access ClubReady > Work It > log task as complete > Send



The screenshot displays the ClubReady CRM interface for a contact named Jasmine Jo. The contact is identified as a "Former Member" and has a status of "not contacted". The interface includes a navigation bar with tabs for "Contact", "Sales Scripts", "Fast Book", and "Automation". A "log call" button is visible in the top right corner. Below the navigation bar, there are buttons for "Make A Phone Call", "Send An Email", "Send An SMS (2)", and "Person to Person". The "Send An SMS (2)" button is highlighted in yellow. The main content area shows a message history for Jasmine Jo, with a blue message bubble containing the text "ready to book a stretch?". Below this, a date separator indicates "Wednesday, Nov 16, 2022". A "Demo Account" message bubble contains the text "It's been a few months since your interest in journey! Still interested?". At the bottom of the interface, there is a "Write your message..." text input field, a "Send" button, and a "Respond with Template" button. A red arrow points to the "log task as complete" checkbox, which is checked.

Jasmine Jo (816) 286- Former Member not contacted [more options for Jasmine](#)

Contact Sales Scripts Fast Book Automation [+ add task](#) [log call](#)

[Make A Phone Call](#) [Send An Email](#) [Send An SMS \(2\)](#) [Person to Person](#)

[Connect SMS](#) [SMS History](#) [Key Note \(0\)](#) [All Notes \(6\)](#) [Lead Type History](#)

Jasmine Jo (816) 286- All

ready to book a stretch? 08:00 AM

Wednesday, Nov 16, 2022

Demo Account

It's been a few months since your interest in journey! Still interested? ! Our trained Flexologists are ready to assist in your flexibility/mobility 09:00 AM

Write your message...

First Name Last Name Address Company

log task as complete [Respond with Template](#) [Send](#)

Send a Campaign

- Access Connect > Campaigns to send a text blast.
 - You must include **“Text STOP to opt out of messaging”** in any marketing campaigns or templates that you send. Failure to include this may result in being blocked or filtered.

Campaigns

Dashboard > Campaigns

Campaign Name *
Cyber Monday!

Select Location *
DEMO LOCATION - NEW

Select Template
Cyber Monday 2023!

Select Recipients *

., Sd × 1, Jonh 1 × 1, My Lead × 111, Gc × 2, D × 2, 1 × 2, 1 × 2, 1 × 2, D × 2, D × 2, D1 ×
2, 1 × 3, 2 × 65929809, Gift Card × ??????????, Emoji 1 ?????? × A1, Jared × A1, J × A2, J × A3, J × 1451 × v

Ababseh, John ×

Message Balance Used 1451

Hello {FIRST_NAME} Hope you had a good Thanksgiving week. Lets talk about Cyber Monday. 🍂

Text STOP to opt out of messages.

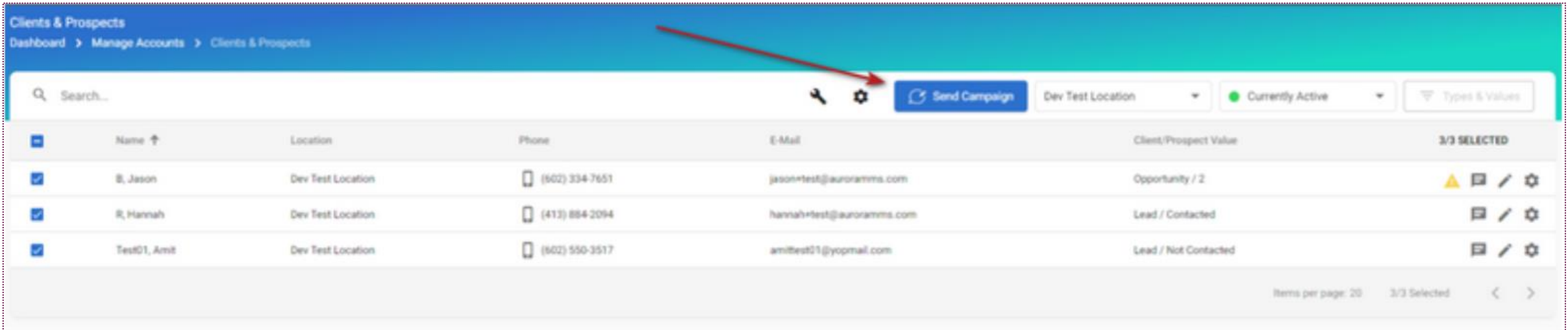
First Name Last Name Address Company 114 ! 📎 😊

Monthly Plan: 10 Sent: 1482 Scheduled: 5682 Overage: 7154 Est. Cost: \$214.62











Send ↗

Send a Campaign: Clients & Prospects

- Access Connect > Clients & Prospects as an alternate way to send a text blast.
 - You must include **“Text STOP to opt out of messaging”** in any marketing campaigns or templates that you send. Failure to include this may result in being blocked or filtered.

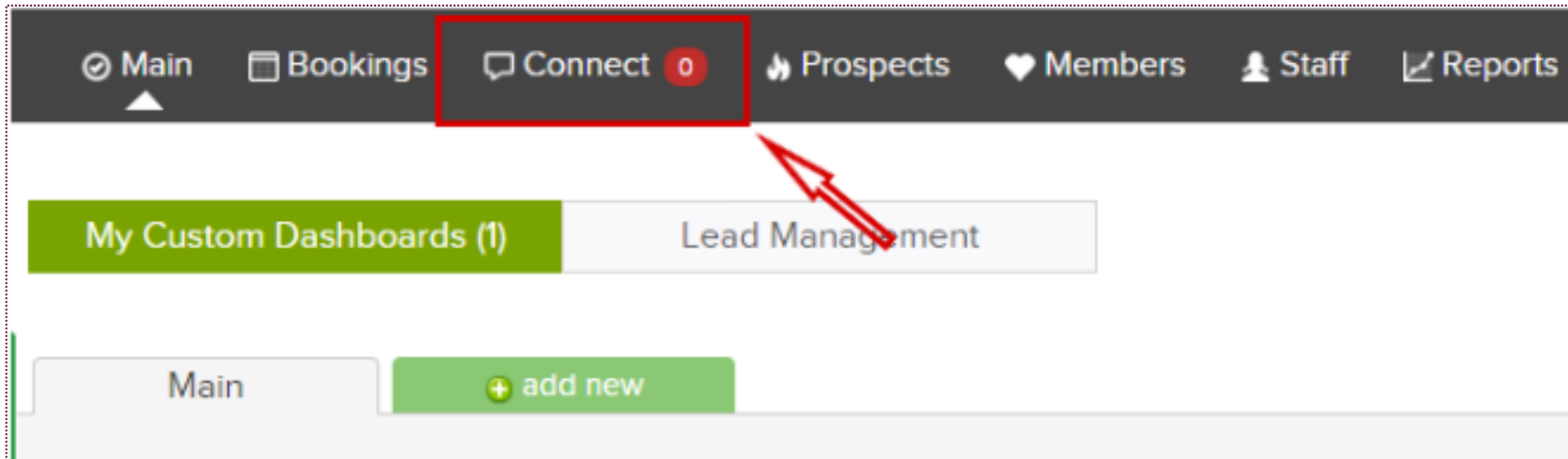


The screenshot displays the 'Clients & Prospects' interface. At the top, there is a search bar and a 'Send Campaign' button, which is highlighted with a red arrow. Below the search bar, there is a table with columns for Name, Location, Phone, E-Mail, and Client/Prospect Value. The table contains three rows of data, each with a checkmark in the first column. The bottom right corner shows 'Items per page: 20' and '3/3 Selected'.

| | Name ↑ | Location | Phone | E-Mail | Client/Prospect Value | 3/3 SELECTED |
|-------------------------------------|--------------|-------------------|----------------|---------------------------|-----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> | B, Jason | Dev Test Location | (902) 334-7651 | jason+test@auroramms.com | Opportunity / 2 |     |
| <input checked="" type="checkbox"/> | R, Hannah | Dev Test Location | (413) 884-2094 | hannah+test@auroramms.com | Lead / Contacted |    |
| <input checked="" type="checkbox"/> | Test01, Amit | Dev Test Location | (902) 550-3517 | amitest01@yopmail.com | Lead / Not Contacted |    |

View Responses

- When logged into your ClubReady site, the Connect tab will display a **red circle** with a number indicating how many responses/unread messages you have.
- **HELPFUL TIPS:**
 - The ClubReady Unread Incoming SMS Widget is not integrated with ClubReady Connect.
 - Refresh your browser regularly to view new messages promptly.

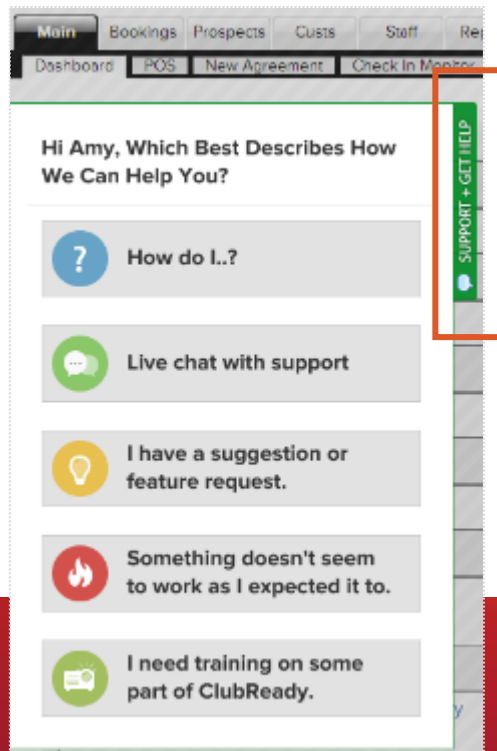


FAQs/Common Issues

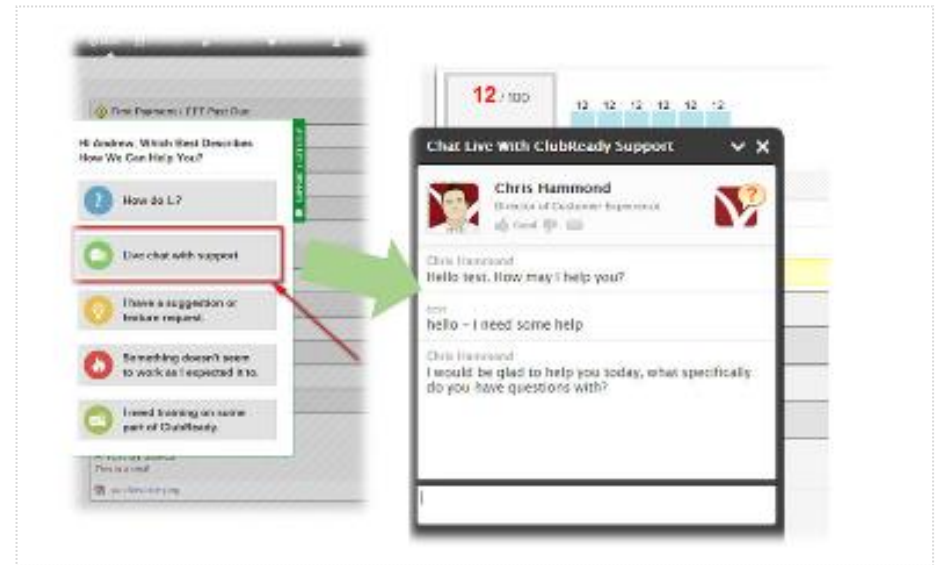
- If unable to see the Connect Tab:
 - Clear cookies & cache
 - Refresh your browser
 - Log out and log back in
- Where can I find additional resources?
 - Visit our dedicated [help center](#)
- Read further frequently asked questions [here](#).

Support + Get Help

Got a problem or need help? Please open a support request by using the green **“SUPPORT + GET HELP”** tab on the left-hand side of your screen or send an email to support@clubready.com



Live chat shows as an option in the support slide out and allows you to chat directly with the support team. Chats can also be converted into help desk support tickets if a resolution is not available during the chat session.



You can also reach our support team at 1-800-405-4818
MON – FRI: 6AM – 9PM CST | SAT – SUN: 8AM – 5PM CST

Stay Connected with ClubReady!



Like us on Facebook for updates on enhancements, how-to's and ClubReady news.



Follow us on Instagram for updates on enhancements, how-to's and ClubReady news.

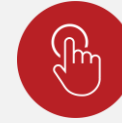


For updates on enhancements and ClubReady news follow @ClubReady



Subscribe to receive status notifications on active incidents or upcoming maintenances <http://status.clubready.com/>

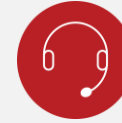
Need Help? Here's How to Get It



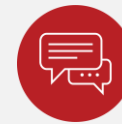
Submit a ticket



Post on the Help Forums



Call for help: **1-800-405-4818**



Use Live Chat



Email us for help: support@clubready.com