To Do List for the PT Manager Preparing to Learn:

- **PT Software**
- **10-Step FC (for 10 step FC clients only)***

*Check the box after completion of each task.*

1. Set up two PT Software shortcut links on your computer
   - PT Staff, [www.BodyWorkzCMS.com](http://www.bodyworkzcms.com)

2. Gain access to PT software
   - Username– email

3. Manuals –Print and organize all materials in a 3-ring binder, then review
   - PT Manager Manual
   - 10 Step FC Manual

4. Podcasts - Download and listen
   - Trainer Introduction to Software (1 hr.)
   - 10 Step Fitness Consultation (1 hr.)

5. Videos –listen
   - PT Software -5 clips –Why Trainers Succeed and Health Club Sales Staff
   - 10 Step FC - 25 clips – Building Value – 4 common Objections – working floor

6. Webinars: Register to attend
   - Trainer Introduction to BodyWorkzCMS Software (1 hr.)
   - 10 Step Fitness Consultation (1 hr.)
   - Mid-month PT Performance Review (1 hr.)
   - End of Month PT Performance Review (1 hr.)

- Connect your computer to a **printer** for printing out agreements

- Enter all PT ‘program plans’ into the software by going to the **Manager tab**.
  - After you have entered the program plans, use the template to create and print the plans to insert into the PT Presentation book.

- Enter each new **trainer’s basic information** into the software through the **Manager tab**. *This information includes permissions, payroll info, etc.*

- Schedule a time to sit with each trainer and review the **6 Crucial Things for a Trainer**.

- Review and edit the **Terms and Conditions** found in the **Manager tab** in the software.

- Review **12 email reminders** –Manager tab – club info

- Purchase and install mailboxes -Trainer mailboxes/ PT review mailbox
  - Create a file folder called ‘**PT Production**’ and label with current month and year.

**JAN 2014**
Client Support Directory

Main Number: 678.222.1700

Each call/meeting requires approximately 1 hour.

- Installation
- Introduction to PT Software
- 10 step Fitness Consultation
- Mid-Month PT Production Review
- End of Month PT Production Review

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6 Crucial Things for a Trainer’s Success Checklist

- **PT Software**
  - **10-Step FC** (where applicable)

1. **Manuals** - Print and Organize materials in a 3-ring binder - read
   - Trainer Manual
   - 10 Step FC Manual

2. **Podcast** - Listen
   - Trainer introduction to PT Software (1 hr)
   - 10 Step Fitness Consultation (1 hr)

3. **Videos** - Watch
   - PT Software - 5 clips – Why Trainers Succeed and Health Club Sales Staff
   - 10 Step FC - 25 clips – Building Value – 4 common Objections – working floor

4. **Sit down meeting manager and trainer**, open the software and PT Trainer Manual.
   - Review/ enter trainer’s employee information, user name, password, permissions, payroll and employee sales goal
   - Set ‘block out’ times for 3 months – week view
   - Schedule a ‘practice’ fitness consultation (FC) at point of sale
   - Review ‘sign in’ procedure for prospects using Customer Id and Pin
   - What trainer should do with FC prospect
     - **If ‘not sold’ go to Hot Prospects**
       - Record specific fitness goal and weak area of fitness
       - Choose the members next step, schedule next session or follow up date
     - **If ‘sold’ go to daily sessions/prospect tab. Convert to a PT client**
       - Record specific fitness goal and weak area of fitness
       - Create an agreement /Welcome auto email sent
   - Tracking of Daily Sessions alerts
   - Review how to do a Session Override
   - Review importance of assessments every 5 weeks
   - Keeping accurate Trainer Reports
   - Reporting tab
     - Trainer Prospects
     - Trainer Clients
     - Trainer Monthly Performance
     - Trainer Renewal Potential
   - Payroll
     - Delinquent payment for client (-1 session)
     - Specific goal missing - no note added

5. **Webinars** - Schedule 1 hr
   - Introduction to PT Software date time
   - Introduction to the 10-Step FC date time

6. **Quiz** - Schedule 2 weeks from the time trainer is hired
   - PT software quiz
   - 10-Step FC quiz
Introducing your Trainers to the BodyWorkzCMS software

Manager’s Tab

- **Find Employee** -
  - Employee information –
    - User name - individuals email address
    - Password -111 (change this by going to permissions section of employee info).
      - only the trainer should know his/her username and password
  - PT checklist
  - Permissions for a trainer
    - Agreements – other plans
    - Assessments – delete
    - Manager – Manager tab
    - Manager – Payroll
    - Reports- All reports (except Cash Mgt)
    - Reports – Restricted viewing
  - Enter payroll information
  - Add Employee Sales Goal
    - **Total Agreement** – creates draft stability in future (4x cash goal)
      - **Cash** - new down payments and renewals
      - **Draft** – expected amount to come in
      - Total revenue for month

Scheduler Tab

- **Filter** by your trainer name
- **Set preferences** (so your name is 1st in trainer order)
- Go to Day View
- Hover
- Enter **Block out times > Block out are in BLACK**
  - Each day on the Scheduler should show Block Out times for at least 3 months out.
- Schedule **Meetings** > Meetings, webinars etc. are in **PURPLE**
- Schedule prospect for **Fitness Consultations** > FCs are in **YELLOW**; these prospects are not yet clients.
- Schedule **Training sessions** > Training sessions are in **GREEN**
- View the scheduler by month, week, day – may be printed
- **To Change** training session or FC find it in the scheduler, click on it, and follow the prompts to delete or reschedule.
Scheduling a New Member for a Fitness Consultation (FC)

- Allow your health club sales rep or front desk limited access to the BW CMS software so prospects can be entered and FCs scheduled as soon as members have joined the club. No permissions are required, only access to the software. FCs are entered in yellow. A full size version suitable for the front desk is provided on the last page of the manual.

To Schedule FCs (new member)

- Enter the day view of the BWZ schedule.
- Hover cursor over the appropriate start time.
- When SCHEDULE box appears, select Prospects.
- Fill using Full name, email (for reminders), gender, and 10-digit phone #. If someone prefers text, be sure to get their phone provider.
- Using the client’s first & last name plus the last 4 digits of their cell number, create a Customer ID. It is case sensitive so no caps. (ex: johnsmith1234)
- Use the Default PIN 111. Click Next.
- Verify information, and that there are no conflicts.
- Finish.

To Schedule FCs (existing member)

- Use first three steps above.
- Using the gray bar at the bottom of the popup - enter the FIRST TWO LETTERS of the prospect's last name.
- Find the name. Please note that they are NOT in alphabetical order.
- Click Next.
- Verify information, and that there are no conflicts.
- Finish.

PT Prospect or Client Sign In Link

- This easiest way to ensure that your payroll will be correct is to make sure that every prospect or client signs in. This will track and compensate a trainer for all sessions rendered.
- From day one ask the prospect or client if he/she has signed in before each session.
- Customer ID is the client’s first & last name plus last 4 digits of their cell phone number (e.g. janedoe1234). Default PIN is always 111.
- Only the PT prospect or client should enter Customer ID and Pin.

Trainer’s Hot Prospect Box – A hot prospect is defined as any prospect who has been “scheduled” for a Fitness Consultation.
**If you do not “sell”**- After the FC, record complete specific goal notes in the Hot Prospects Tab (HP) in order to choose a path.

- **Schedule next session-save** This will bring up the schedule for the preset time in the future. (set default in the manager tab/club info). Schedule and save. Failure to schedule will not update the record or remove it from the HP Box.
- **Follow up only** Select a date. The system will preselect one month out. Change date, if needed, before saving. Save will produce a popup note box. Add any additional info about the client that is pertinent. (ex. Prefers calls versus email) Prospect will return to HP on the chosen date. Do not save again. Refresh.
- **No Follow Up needed** Use sparingly. Only recommended when a member has left the club, or insists that they are no longer contacted. Otherwise use Follow up, and set the dates out further. No note needed.

**The prospect will drop off after the page has been refreshed for any option other than “no follow up” which is immediate.**

**If you do ‘sell’,** find the prospect in the Daily Sessions which will link to the Prospect Tab, click on add Specific Goal, noting why prospect joined club and weak areas of fitness. Click on Convert to Client, complete the customer information. Following completion you will be directed to their client page where you will have the ability enter the PT agreement information. Automatic welcome emails will be sent to both the client and trainer.

### Daily Sessions Tab - Know your Colors.

- **Specific Goal** – Motivation for Member’s lifecycle, set times for next appointment, follow up, or no follow up needed.
- **Renewal** – revisit specific goals/assessment and show next step in program to re-sign.
- **Assessment** – revisit specific goals and hold accountable every 5 weeks
- **Check Payment** – why delinquent status....
- **Happy Birthday** – Keep it personal!

### Session Overrides

- Every night before leaving club the trainer should check the Daily Sessions Tab to compare scheduled PT appointments against actual. Any discrepancies should be entered as a Session Override.
- Click on the Session Override button on Daily Sessions tab.
- Client/Prospect must have been on your schedule to show here.
- Document reasons for each Session Override (e.g. no call no-show, client cancelled less than 24 hours/ sub trainer / client neglected to log in).
- Click update to save the comment, and a manager will render the session- If the rendering is not done, it will not show on payroll report.
- Managers are responsible for the final rendering of the session, and should keep up to date weekly to ensure no one is missed.

**Client Profile Tab**

- All new and renewal agreements are created here.
- If a member has ever purchased training, they will be found in the Client Tab.
- Assessments
- Notes

**Reports Tab**

- **Trainers Prospect**- list of all prospects listed under your name-who has been scheduled, rendered or sold
- **Trainer’s Client List** - Contact info – sessions remaining – last assessment – ability to pull expired clients as well to reach out to them
- **Trainer’s Renewal Potential** -Assessments completed? Will client be resigning- why or why not?
- **Trainer’s Monthly Performance** – check mid and end of month
  - Personal Sales Goals – Total Agreement – Cash – Draft
  - FC’s – Scheduled 100% Rendered 65% Closed 20% *specific goal and weak area of fitness
  - Clients – are all Active-if not why
  - New Sales /Renewal sales
  - Draft – Any delinquent draft collections needed?
- **Monthly Club Sales**- Accounting numbers, for reporting sales.
- **Club Vitals**- Mid-month and EOM review with owner, PT manager, trainers and membership sales to review PT goals and discuss challenges related to:
  1. Organization
  2. Leads
  3. Sales
  4. Retention

**Manager Tab**

- Run Payroll-Print Payroll
- Sending manual emails via BodyWorkz.
Mid-month PT Performance Review-1 hour
Recurring meeting 3rd week of the month with trainers and membership staff to review Club Vitals report, PT goals, and challenges.

1. Organization

- **Engage Daily sessions**
  - **Specific Goal** – Motivation for Member’s lifecycle, set time for next appointment, follow up, or no follow up needed.
  - **Renewal** – revisit specific goals/assessment and show next step in program to resign.
  - **Assessment** – revisit specific goals and hold accountable every 5 weeks.
  - **Check Payment** – what is the reason for the delinquent status?
  - **Happy Birthday** – Keep it personal!

- **Check Scheduler** – look for FC’s and block out time 3 months going forward
- **Daily Transaction Report**
  - New and Renew - Agreements with signatures and payment receipt
  - Manual draft – Collected at club payments / receipts
  - 3rd party – Print PDF reports for deposit amount.

- **Session Overrides** – Record and identify reason
- **Delinquent Draft Report** – Review delinquent draft for collections.
- **Payroll** – Run and confirm accuracy (check FC notes added)
- **Payroll Summary** – Trainers’ check amounts

2. Leads

- **Leads-New Members**
  - Number of new members entered into BodyWorkz. This includes manual entries and ABC drops. For a detailed list pull your Trainers Prospects Report and select New Members.

- **Leads-Scheduled Ever**
  - Number of new members entered into BodyWorkz this month who were scheduled a Fitness Consultation (FC) at the point of sale. This includes all appointments scheduled out in the future, not necessarily scheduled in this month. For a detailed list pull your Trainers Prospects Report and select Scheduled.

- **Leads-All**
  - FCs on the scheduler as of yesterday. (Goal is 60-100 total in the month)

- **Rendered**
  - Number of Prospects who showed up to their appointment. Trainer’s Prospects Report and select Sessions Received.

- **With Specific notes**
  - Number of Prospects who had notes entered after appointment.

- **Without Specific Notes**
  - Number of Prospects who had NO notes entered after appointment.
3. **Sales**
   - **Closed**
     - Number of Prospects who bought a training package during their appointment.
   - **Total Agreements**
     - Number of new agreements sold as of yesterday. For a detailed list pull your Daily Transaction Report.
     - Total agreement value on all new agreements sold. (Goal is to average above $500-$1,000). For a detailed look at packages sold pull your Package Summary Report. Selling long term?
     - Cash Goal- Down payments (new and renewal), PIFs, and collected at the club.
     - Draft (expected)
     - Next Month Draft increase or decrease
     - Total revenue for month

4. **Retention**
   - **Clients**
     - Number of clients who are about to run out of sessions. If pulled the 1st-15th it will show clients with 8 sessions or less remaining. If pulled after the 16th it will show 4 sessions or less remaining. For a detailed list pull your Trainers Renewal Potential Report.
   - **No Assessments**
     - Number of clients who are about to run out of sessions who have no fitness assessment on file.
   - **Down Payments**
     - If all of these clients renew this month and purchase the same package as before, this is the possible down payments you can expect to collect. Goal is no less than 50%.

**Emails sent out Automatically**
- Prospect by date (session received) -25^{th} of the month last 3 months
### Club Vitals Review

#### Anytime Fitness

**Leads - New Members**

| New Members | 20 |

**Scheduled Ever**

| 20 (90.00%) |

**Leads - All**

| Rendered: 20 (66.66%) | With Specific Notes: 20 (66.66%) | Without Specific Notes: 0 (0.00%) |

| 2 | 3 | 4 |

**Sales**

<table>
<thead>
<tr>
<th>Total Agreements: 36</th>
</tr>
</thead>
<tbody>
<tr>
<td>Goal: $19,000.00</td>
</tr>
<tr>
<td>Actual: $13,965.00</td>
</tr>
<tr>
<td>Projected: $13,965.00</td>
</tr>
<tr>
<td>% of Goal: 73.60%</td>
</tr>
</tbody>
</table>

| Cash: $7,965.00 |
| New: 0 |
| Review: 30 |
| Subtotal: 30 |
| Expected Draft: $5,745.00 |
| Solicited: ($5,745.00) |
| Manual: ($5,745.00) |
| Subtotal: ($5,745.00) |
| Total: $13,965.00 |
|预报月结: $7,385.00 |
| Draft Amount Added: $1,740.00 |

**Retention**

<table>
<thead>
<tr>
<th>Retention: 8 client sessions remaining</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clients: 33</td>
</tr>
<tr>
<td>No Assessments: 2</td>
</tr>
<tr>
<td>Down Payments: $9,570.00</td>
</tr>
</tbody>
</table>

**Sessions Rendered:**

<table>
<thead>
<tr>
<th>Trainer</th>
<th>1.15</th>
<th>16.20</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time 1</td>
<td>FC</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Time 2</td>
<td>102</td>
<td>125</td>
<td>227</td>
</tr>
<tr>
<td>Time 3</td>
<td>10</td>
<td>3</td>
<td>13</td>
</tr>
<tr>
<td>Time 4</td>
<td>7</td>
<td>4</td>
<td>11</td>
</tr>
<tr>
<td>Time 5</td>
<td>10</td>
<td>9</td>
<td>19</td>
</tr>
<tr>
<td>Time 6</td>
<td>10</td>
<td>3</td>
<td>13</td>
</tr>
<tr>
<td>Total PT: 174</td>
<td>192</td>
<td>366</td>
<td></td>
</tr>
<tr>
<td>Total FC: 7</td>
<td>4</td>
<td>11</td>
<td></td>
</tr>
</tbody>
</table>

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1. **Scheduled Ever- 90%**
   - **INTRO TO SOFTWARE and ANYTIME HEALTH WEBINAR**
     - Build value in AH and coach on tour

2. **Scheduled – goal is 60-100**
   - **PROSPECTING WEBINAR**
     - new members, Not sold FC follow up appointment , member non usage list, 60 days

3. **Rendered - 65%**
   - **10 STEP WEBINAR**
     - Make reminder call excited to help in fitness journey - role play 5 practice messages

4. **Closed - 20%**
   - **10 STEP WEBINAR**
     - Go back to webinars on 10 steps to build value and anchor emotional desire.

5. **With Specific Notes - 100%**
   - **ADVANCED CLOSING WEBINAR**
     - How will we call back prospects or keep clients fitness journey alive without this?

6. **Sales Goal- quota set**
   - **MID MONTH OR END OF MONTH WEBINAR**
     - Is total agreement value 4xs bigger than cash?
     - Lifestyle agreements -3 months equal a result like losing stomach. 10/14 months change lifelong habits.

7. **No Assessments- clients should have a fitness milestone every 5 weeks**

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End of Month PT Production Review-1 hour
Recurring meeting 1st week of the month with trainers and membership staff to review the last month Club Vitals report together to set PT goals and discuss challenges.

1. Organization

- **Engage Daily sessions-Know your Colors**
  - **Specific Goal** – Motivation for Member’s lifecycle, set time for next appointment, follow up, or no follow up needed
  - **Renewal**– revisit specific goals/assessment and show next step in program to resign
  - **Assessment**- revisit specific goals and hold accountable every 5 weeks
  - **Check Payment**- why delinquent status....
  - **Happy Birthday**- Keep it personal!

- **Check Scheduler** – look for FC’s and Block out time 3 months going forward.
- **Daily Transaction Report** –print for monthly production file
  - New and Renew- Agreements have signatures and payment receipt.
  - Manual draft- Collected at club payments / receipts
  - 3rd party–Print PDF reports for deposit amount.

- **Delinquent Draft Report** -Review delinquent draft for collections.
- **Session Overrides**- Record and identify reason.
- **Payroll**- Run and confirm accuracy (check FC notes added)
- **Payroll Summary**- Trainers’ check amounts and comparison to gross receipts.

2. Leads

- **Leads-New Members**
  - Number of new members entered into BodyWorkz. This includes manual entries and ABC drops. For a detailed list pull Trainers Prospects Report and select New Members.

- **Leads-Scheduled Ever**
  - Number of new members entered into BodyWorkz this month who were scheduled a Fitness Consultation (FC) at the point of sale. This includes all appointments scheduled out in the future, not only scheduled this month. For a detailed list pull Trainers Prospects Report and select Scheduled.

- **Leads-All**
  - FCs on the scheduler as of yesterday. (Goal is 60-100 total in the month)

- **Rendered**
  - Number of Prospects who showed up to their appointment. Trainer’s Prospects Report and select Sessions Received.

- **With Specific notes**
  - Number of Prospects who had notes entered after appointment.

- **Without Specific Notes**
  - Number of Prospects who had NO notes entered after appointment.
3. Sales
   • Closed
     ➢ Number of Prospects who bought a training package during their appointment.
   • Total Agreements
     ➢ Number of new agreements sold as of yesterday. For a detailed list pull your Daily Transaction Report.
     ➢ Total agreement value on all new agreements sold. (Goal is to average above $500-$1,000). For a detailed look at packages sold pull your Package Summary Report. Selling long term?
     ➢ Cash Goal- Down payments (new and renewal), PIFs, and collected at the club.
     ➢ Draft (expected)
     ➢ Next Month Draft increase or decrease
     ➢ Total revenue for month

Employee Sales Goals
   o Total Agreement- 4x’s cash when building Draft
   o Cash -New sales deposit and 50% PT renewal potential $ __________
   o Draft- Current month’s draft? $ __________

   PT MONTHLY REVENUE GOAL $ ___,_______

4. Retention
   • Clients
     ➢ Number of clients who are about to run out of sessions. If pulled the 1st-15th it will show clients with 8 sessions or less remaining. If pulled after the 16th it will show 4 sessions or less remaining. For a detailed list pull your Trainers Renewal Potential Report.
   • No Assessments
     ➢ Number of clients who are about to run out of sessions who have no fitness assessment on file.
   • Down Payments
     ➢ If all of these clients renew this month and purchase the same package as before, this is the possible down payments you can expect to collect. Goal is no less than 50%
   • Trainer Renewal Potential
     ➢ Focus on clients w/4 sessions or less remaining
     ➢ Assessment’s completed? When re-signing if not why?

Emails sent out Automatically
1. Welcome New Clients (1st of the month)
2. Happy Birthday (Daily)
3. Prospects by date (no session received) (1st of month for last 3months)
Automatic Drafting with BodyWorkzCMS Software

1. Auto Draft Upload Process
   - Draft Log Report
   - **Draft will show pending 3-5 business days prior to the draft date.** Weekends and holidays do not count as business days. **You cannot change a draft that is pending or make a payment against that draft.**
   - **Definition of Manual Draft** – Payments will be collected at the club and manually entered into BodyWorkz if manual box is checked on the agreement. They will not be uploaded. To record a manual payment, select **Make a Payment** under **Client Profile**, add the amount and date. If drafts are left unchecked without payment, but with billing information, they will upload with the next draft.
   - **Definition of cancellation** – This will **STOP** future drafts unpaid from being processed. Client WILL be able to use sessions that have been paid, until the agreement expires.
   - **Definition of freeze** – This will **STOP** future drafts unpaid from being processed, but client will be unable to render sessions during the duration of the freeze. **FREEZE/UNFREEZE**-Will allow you change an expiration date.

2. Auto Draft Reconciliation Reporting **(Schedule recurring meetings monthly)**
   - **Delinquent Draft Report**, you will see any outstanding client and the reason why.
   - You will get a **PDF report** for every deposit, return, or chargeback, which you can access through your Manager tab. **Please print these PDF files and place in your PT Production folder to show reconciliation of payments.** ABC will deposit the Net amount of your drafts, less the wire fee and ABC percentage, within 3 business days of the draft date.
   - **Payments**
     - **PDF beginning with a P** – draft processed file. This will show your transactions and net deposit. This does not indicate that all drafts were collected, and must be verified.
   - **Returns and Chargebacks** received in between your draft dates will be deducted from your next deposit from ABC.
     - **PDF beginning with an R** - **Return** – Typically a transaction that was approved initially, you received money for it, but it was later declined. Normally appears 3 days after the original Payment PDF.
     - **PDF beginning with an X**- Bank **Correction** of new account information-. Typically is still paid in a Payment PDF, but you will need to look to get clients updated payment information before next draft.
     - **PDF beginning with a D** – **Dispute*** – This occurs when a client is disputing a credit card charge. This file will show the phone number to call, file number, days left to respond, and other pertinent information.
     - **PDF beginning with a C** - **Chargeback** – The immediate action associated with a dispute. It will be deducted instantly from your accounts until successfully answering the dispute.
**CHARGE BACK DISPUTE INFO** With recent consumer credit laws, client can dispute a charge indefinitely. You will receive an email with clients name case reference # and card type to be able to fight chargeback. The email attachment will have to be faxed back to the appropriate company as proof that the charge is legitimate. You must also confirmed fax was received after 24hrs.

<table>
<thead>
<tr>
<th>Card Type</th>
<th>Fax</th>
<th>Phone</th>
<th>Merchant ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>MC/Visa</td>
<td>301-766-5679</td>
<td>800-285-3978</td>
<td>433001000887</td>
</tr>
<tr>
<td>AMEX</td>
<td>623-444-3000</td>
<td>800-528-5200</td>
<td>1036500676</td>
</tr>
<tr>
<td>Discover</td>
<td>614-283-4774</td>
<td>800-347-0350</td>
<td>601101025659846</td>
</tr>
</tbody>
</table>

3. Manually Processing Draft Declines:
- Auto drafting does not re-run declines or do collections.
- Neither ABC nor BodyworkzCMS handle refunds for your clients.
- All declines will show also on the PDF files. BodyWorkzCMS recommends that you retain receipts for processed declines and attach to the monthly Draft Log Report.
- Any manual entries must be entered into the BodyWorkzCMS software through the Payment tab under Manager or in the individual Client Profile/make a payment.

**Manual Drafting with BodyWorkzCMS Software**
- **Definition of cancellation** - This will **STOP** future drafts unpaid from being processed. Client **WILL** be able to use sessions that have been paid, until the agreement expires.
- **Definition of freeze** – This will **STOP** future drafts unpaid from being processed, but client will be **unable** to render sessions during the duration of the freeze.

1. **Draft Uploads Processing** (Schedule recurring meetings monthly)
   - **At the Club** (credit card machine /collecting checks)
     - On the chosen draft dates, go to Manager tab, View Draft Report, and print the draft date. (ex. 10th and 25th)
     - From View Draft Report, enter credit card numbers and amounts in machine (staple receipts to Draft report). This will go in the PT Production File for the month
   - **3rd Party Processing** (Front end management software)
     - Print 3 agreements when signing up PT client 1 client / 1 club/ 1 entry for 3rd party billing

2. **Draft Reconciliation Reporting**
   - Click on the Manager tab and click Draft Reconciliation
     - Select draft date
     - Check off all processed payments
     - Click add
     - Manually add total processed on bottom right side
     - Click done
     - In the Draft Log Report, you will still see fully paid drafts and payment received.
   - All declines or late payments should be entered in Make a Payment under Manager tab for correct dates to be recorded.

TO BE PLACED IN A VISIBLE LOCATION TO ASSIST WITH SCHEDULING FC’s

TO SCHEDULE FCS
   - Enter the day view of the BWZ schedule.
   - Hover cursor over the appropriate start time.
   - When SCHEDULE box appears, select Prospects.
   - Pop up (shown).

   - Fill using Full name, email (for reminders), gender, and 10-digit phone #. If someone prefers text, be sure to get their phone provider.
   - Using the client’s first & last name plus the last 4 digits of their cell number, create a Customer ID. It is case sensitive so no caps. (ex: johnsmith1234)
   - Use the Default PIN 111.
   - Next.
   - Verify information, and that there are no conflicts.
   - Finish.