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| Quick Reference Guide for  Managers | | |
| Mangers Resources  These activities are to be overseen by managers only. | | |
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| Manually Uploading Agreements | | |
| 1. Click Members 2. Lookup Member | 1. Click “document” tab 2. Click “Upload” ” | 1. Click “browse” 2. Select file from computer and click “upload |
| Retrieve Pin# To Authorize Action | | |
| NOTE: Here, you can also change your personal account preferences such as password, security question and answer. | | |
| 1. On the Dashboard, at the top right of the page, select the dropdown arrow that currently reads your first and last name | 1. Select “Edit Account” 2. Select “Show Pin” | 1. Click “Show Pin”: Please note that you cannot edit your own pin, however, it can be auto-generated if need by selecting |
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| Manually Redeeming Session Booked | | |
| 1. My Planner 2. Staff Appointments Audit 3. Select the date range 4. Select the “Show Cancelled Appointments” box | 1. Cross reference the appointment listed on the MyPlanner redemption log with your club’s Exception Log. 2. Validate the “status” line. IF your trainer has selected “No-Show” or “Late Cancel”, this line requires your authorization to complete the redemption. All other redemptions should have a corresponding reason listed in the Exception Log (Forgot to check in, forgot password, computer down, etc) | 1. To redeem the session, select the corresponding row and then click “Authorize”. 2. Select Employee Authorization 3. Enter your 4 digit manager PIN# and click “done” |
| Redeeming sessions that were NOT Booked:   1. Click on Activity Management icon 2. Click Find (Upper right Hand side) 3. Enter last name of Client to Consume Session 4. Choose the client and click ok. (DO NOT HIT ENTER!) 5. Choose session type to consume from the redemptions tab Choose Trainer from Drop Down 6. Click Use    1. o For a Show    2. o No Show or    3. o Late Cancel 7. Make a note as to reason for 8. No Show, Late Cancel or Show 9. Click Redeem | | |
| How to rewrite a PT Agreement   1. Select the Members Icon 2. Lookup your member 3. Click “Agreements” tab 4. From list of agreements, select the agreement that you want to “rewrite” 5. Select “edit” then “rewrite” 6. Choose a “reason” 7. Enter any associated comments associated with Click the rewrite 8. Click “begin rewrite” 9. Rewrite your NEW agreement. | | |
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| 1. 1. Click on Activity Management icon 2. 2. Click Find (Upper right Hand side) 3. 3. Enter last name of Client to Consume Session 5. 4. Choose the client and click ok. (DO NOT HIT ENTER!) 6. 5. Choose session type to consume from the redemptions tab 7. 6. Choose Trainer from Drop Down 8. 7. Click Use 9. o For a Show 10. o No Show or 11. o Late Cancel 8. Make a note as to reason for 12. No Show, Late Cancel or Show 13. 9. Click Redeem | | |
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