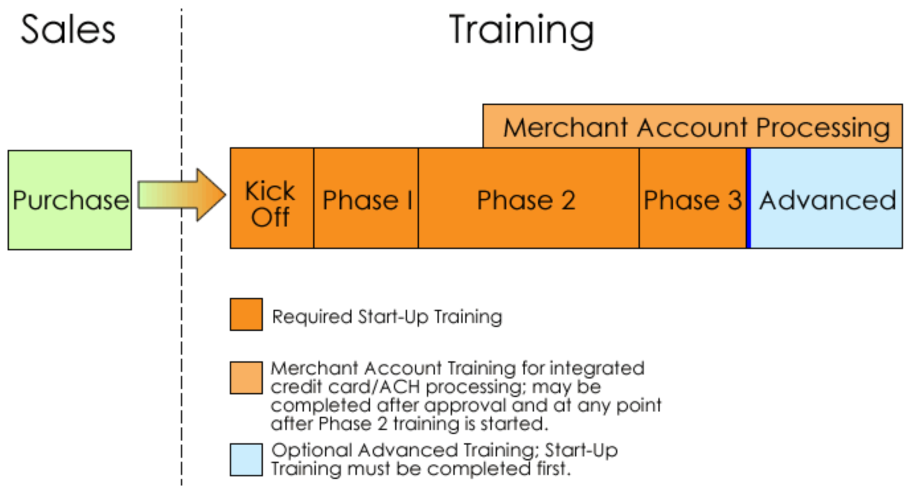
MINDBODY Start Up Training Guide

You've purchased the software and are ready to go, so what do you do next?



STEP 1:

The first thing you should do after purchasing is schedule your *Kick-off consultation* with a certified MINDBODY consultant.

Call 1-877-755-4279 or 1-805-546-2000 to get started.

What is a Kick-Off consultation?
The Kick-off consultation is quick 15 – 30 minute introductory call to help us understand the services and products you offer, and to help you understand the implementation process. We are also able to answer any lingering questions you may have after purchasing. We take all the information we learn from this call and use it to match you with the best trainer possible. It is recommended that the business owner(s) or any individual involved with the software implementation process be present.

STEP 2:

After your Kick-Off Call is complete, your consultant will schedule your first **Start-Up Training** session.

What is Start-Up Training?
MINDBODY'S unique Start-Up Training program teaches you how to customize your site, learn basic use (i.e. how to sign in classes, book appointments, manage retail), and ultimately launch your software online so your clients can schedule and shop online.

MINDBODY divides Start-Up Training into 3 Phases: Phase I, Phase II, and Phase III. These trainings build upon each to give you a solid foundation in the software.

- **Phase I (Site Setup)** – during this 50 minute call, you will set up your services, prices, schedules, and staff.
- **Phase II (Everyday Use)**– during this 50 minute call, you will learn the basic everyday use of the software such as signing in classes, booking appointments, making purchases, managing retail, and managing staff.
- **Phase III (Web Booking & E-commerce)** – during this 50 minute call, you will learn what your clients experience and how to create links from your website to your MINDBODY software so clients can schedule online and make purchases.

You may find that you may need more than just one call for each phase of Start-Up training and that's *not a problem*.

We work at your pace to implement your software. On average, clients with MINDBODY are ready to launch after 4 training calls (most take 2 calls to get through Phase 2).

Additional advanced training is available after you complete Start-Up training. We recommend waiting 2-3 weeks after using the software live before scheduling any advanced training sessions.

Preparing for Phase I

Prior to the Phase I training session, you should accomplish the following five tasks. If you need help, your trainer will cover this with you during your first call.

1. Access your MINDBODY software at https://clients.mindbodyonline.com.

2. Login and change your owner password.
    - Login using the owner username and password provided in your Welcome email.
    - Follow the menu path: Toolbox>Setup>Staff>Users and Groups
    - Click the "Change Owner Password" link in the top right corner. *Passwords must be at least 8 characters in length, and include both numbers and letters.*

3. Create a shortcut on your desktop.
    - PC users, follow the menu path: Help>Desktop Shortcut
    - Mac users follow the menu path: Toolbox>Setup>Links and Shortcuts to generate a link for a bookmark.

4. Set up business contact information.
    - Follow the menu path: Toolbox>Setup>Business and Location Info.

5. Register for Training Webinars.
    - We recommend attending Webinars prior to your Phase I training session become familiar with the software navigation and use.
    - To register for Webinars, follow the menu path: Help>Training Webinars
    - Click Register for the Training Webinar(s) you wish to attend.

Start-Up Training Checklists

The checklists on the following pages are used by the trainer to track your progress throughout Phase I, Phase II, and Phase III. Use these checklists to follow along with your trainer.

Please note that, depending on the software modules enabled (class/event and/or appointment scheduling), some of the items on the checklist will not apply to your software setup.

The trainer will complete enough examples of each task with you so that you understand how to complete each task on your own.

Help Resources

Online Users Guide & Front Desk Manual – access a full user's guide and Front Desk Manual under the Help menu of your software.

Email us at support@mindbodyonline.com with any non-urgent questions. Responses are made within 1-2 days.

Call us at 1-877-755-4279 or 1-805-546-2000

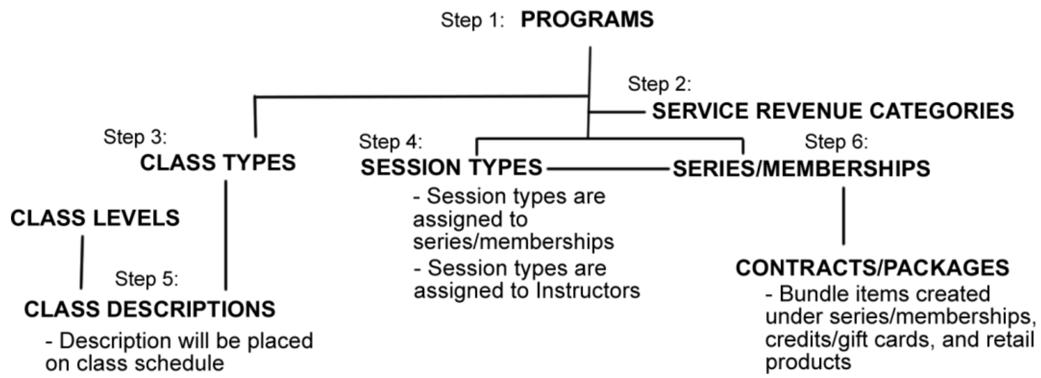
Chat to us online using Live Tech Support under your Help menu.

Support Hours:
6:00 AM – 6:00 PM Monday – Friday
9:00 AM – 3:00 PM Saturday & Sunday
After hours appointments are available by request for clients outside the U.S. and in Hawaii.

Phase I – Software Setup

This diagram outlines the structure of the software and order followed during Phase I.

SOFTWARE STRUCTURE



✓	Task	Location	Description
	Create Programs	Toolbox>Setup>Services> Programs *uncheck Show Active Programs Only*	First level of service categorization. Services and fees affect the setup of programs.
	Service Revenue Categories	Toolbox>Setup>Services>Revenue Categories	Revenue Categories separate sources of income on sales reports. Often times these mirror Programs.
	Class Type	Toolbox>Setup>Services>Class Type Setup	Second level of service categorization under Programs. Class Types will be the more specific names for the type of classes or workshops offered.
	Session Types	Toolbox>Setup>Services>Session Type Setup	Second level of service categorization under Programs. Session Types affect appointment based Programs only.
	Class Event Descriptions	Toolbox>Setup>Services>Class/Event Descriptions	This page is used to create both Class and Event descriptions, as they will appear on the schedule.
	Add Teachers and Staff	Toolbox>Setup> Staff> Staff Management – Add New Staff Member	This section is used to add all staff members (teachers, instructors, desk staff, etc)
	Class/Hourly Pay rates	Staff Profile	The hourly pay rate is for use with our Time Clock feature. Class pay rates are used for classes and workshops only.
	Appointment Rates and Booking Times	Staff Profile	This page has 3 functions: to indicate which types of appointments the individual can take, how much they are paid for completing the appointment, and the appointment length.
	Appointment Availability	Staff Profile OR Toolbox>Setup>Staff> Appointment Availability	Instructor schedules for appointment availability and unavailability.

	Schedule a Class	Toolbox>Setup>Services>Class/Event Descriptions Or Toolbox>Setup>Services>Class/Event Schedules	Create Class/Event Schedule by selecting either the "Schedule It" link to the right of the class name or clicking "Add New Class/Event Schedule" in the top right of the page
	Series and Memberships	Toolbox>Setup>Pricing>Series and Memberships	Add series and/or memberships to pay for services in each program type (Class/Enrollment/Appointment)
	Schedule a Workshop or Event	Toolbox>Setup>Services>Class/Event Descriptions Or Toolbox>Setup>Services>Class/Event Schedules	After adding a series for a workshop you may schedule the related workshop ***Note: Scheduling a workshop requires that a series to pay for that workshop be created first**

After Phase I:

- Review your checklist and add any remaining services, instructors, prices, descriptions and schedules.

- Go to the Help menu in your software to reserve a spot in one or more of our Training Webinars and gain a sneak preview of what's ahead for Phase II.

    - Sign up as many times as you like and have your staff join in as well!

    - You may also view the recorded Training Webinars, which are also listed at the bottom of the Training Webinar page.

Phase II – Every Day Use

Class and Workshop Registration

✓	Task	Location	Description
	Do a quick add for a new client	Classes Tab - Click "Sign In" link for a class, and click Add Client Button at top of Sign In Screen	There are several places to add clients into the software, one of which is the class sign in page.
	Sign a client into a class	Classes Tab - Click "Sign In" link for a class, and use Search option to look up a client to sign in	Sign a client into a scheduled class and review the sign in sheet basic functions.
	Purchase services for classes	Click "BUY" on Sign In Screen Retail POS Screen Select Item to Purchase on right side of screen.	The buy button will link the user to the Retail screen, where they may select items to purchase.
	Create Recurring Class Reservation	Classes Tab - Click "Sign In" link for a class. Then click Adv. Registration button on top right above sign in sheet.	The Advance Registration feature will allow the user to create recurring client reservations for the selected class.
	Enroll a client into a workshop	Workshops Tab - Click "Enroll Client", Select a client to enroll, and follow through purchase process	The enrollment process forces client enrollment into each session of the workshop, and requires purchase of a specific series/membership

Appointment Booking and Check Out

	Schedule an appointment	Appointments Tab	Know how to find availability and schedule appointments. Create an appointment by clicking on the program name within the staff member's availability.
	Check out an appointment	Appointments Tab	Complete an appointment by clicking on the client name or using the Check In/Check Out feature
	Purchase services for appointments	Appointment Details - Click "Check Out"	The Check Out button will link the user to the Retail screen, where they may select items to purchase.

Client Management

	View/Edit Client Profile	Client Info Tab - Profile	Explore the different contact information fields, including contact information, emergency information, billing information, referrals and relationships
	View/Add Contact Log	Client Info Tab - Contact Logs	Contact logs aid in staff communication and incident documentation.
	View the client schedule	Client Info Tab - Schedule	The schedule will list all upcoming reservations, as well as include the option to cancel those reservations
	Attendance History	Client Info Tab - Visits	Visits contain attendance history for classes, workshops, or appointments, as well as cancellation records.
	Purchase History	Client Info Tab – All Purchases	All Purchases contains any past purchases. Sale IDs will link the user to the Void and Returns area of the software.

	Accounts and Contracts	Client Info Tab - Accounts Details	Accounts Details will contain all series and account credit information.

Retail Management

	Add Gift Cards and Account Payments	Toolbox>Setup>Pricing>Gift Cards & Account Payments	Create Account Payments, Assignable Gift Cards, and/or Prepaid Gift Cards.
	Create Packages	Toolbox>Setup>Pricing>Contracts & Packages	Add a package of services (if applicable) to your business.
	Review Product Menu Items	Toolbox>Products	The Products menu contains different options, from Inventory Tickets to adding Revenue Categories, which will assist in adding Retail Products.
	Basic Product Management	Toolbox>Products>Product Management	Review fields (required and optional) for adding a new product, or managing an existing product. Discuss the difference between a Single Product and a Group of Products.
	Sell a product	Retail Tab - Products	Using a test client, lookup and sell a product from the retail tab.
	Sell a gift card/account payment	Retail Tab – Gift Cards/Account Payments	Using test client, lookup and sell an account payment and/or gift card.
	Void Test Sales	Retail Tab – select Manage Sales	Generate a report of transactions for test clients. Remove any test transactions made during training.

Basic Reports

	Review End of Day Reports	Reports>Sales> Sales/Cash Drawer/Sales by Category/Gift Cards	Access sales reports needed for tracking sales. Reports are harmless; running a report does not affect your site.
	Review Payroll Report	Reports>Teachers and Staff>Teacher Payroll	Generate the payroll report for scheduled staff

Staff Logins

	Add and modify a user group	Toolbox>Setup> Staff> Users and Groups	Set up groups with logins to the software for other staff members (they should not be using the owner login). Each login must be assigned to a staff member in order to work properly. Groups and logins are unlimited.

After each Phase II session:

- Practice, Practice, Practice! Practicing the tasks you learn in Phase II will help you come up with questions for your trainer and help you to become more comfortable with what you will be doing on a daily basis. You may even find items from Phase I you want to change and your trainer can help you do this during your next call.

- Create and use 1 – 2 test accounts in your own software to review items covered during training. We recommend you do not use more than two test clients for training or use real clients.

- *Keep your test accounts to a minimum. Using more than two clients or real clients for training will make it difficult to track down and void any practice sales, reservations, and other records created during your Start-Up training.*

Phase III - E-commerce and Web Booking

✓	Item	Location	Description
	Generate links for website	Toolbox>Setup>Links and Shortcuts	Generate links for use on the business website to get clients booking and purchasing services online
	Activate Online Store (if applicable)	Toolbox>Setup> Options> General Setup and Options	Enable Online Store; Update Online Store Settings (shipping method is required)
	Mark services for online sale	Toolbox>Setup>Pricing>Series and Memberships	Check "Sell Online" for series which will be offered for online purchase
	Mark products for online sale	Toolbox>Products>Manage Products	Check "Sell Online" for products which will be offered in the Online Store
	Add Item to Shopping Cart	Login as a consumer	Add item to cart, demonstrate checkout.
	Sign up for class/appointment online	Login as a consumer	Demonstrate, from a client's perspective, how to reserve classes and appointments online.
	Review Manage Online Orders Report	Reports>Online Store>Manage Online Orders	Enter tracking number, print packing slip, change order to Shipped
	Auto Emails	Toolbox>Setup>Auto Emails	Demonstrate how to enable auto emails
	Review the Link Generator	Toolbox>Setup>Links and Shortcuts	This is where you or your webmaster will go to generate links for clients so they can access your schedule, sign up for classes, request appointments, and make purchases online.
	Add a login for your webmaster	Toolbox>Setup>Staff>Users and Groups	Create a login and password for your webmaster. Use the default webmaster group which contains permissions for the Link Generator under Toolbox>Setup>Links and Shortcuts.

After Phase III:

- Review your checklist and finish any outstanding items.
- Coordinate with your webmaster to add links from your scheduler to your business’s website.
- Take a deep breath! You’ve completed Start-Up training.

The following sections outline Advanced Training, which can be taken at any time after your Start-Up training and Merchant Account Training, which is taken after you are approved for credit card processing.

Advanced Training

Once you have completed Start-Up training (Phase I – III) you may schedule an Advanced Training session. The Advanced Training session is your introduction to MINDBODY Education programs, such as MINDBODY University and MINDBODY Chalk Talks. We offer one free Advanced Training session per location that enables business owners to maximize their potential with the MINDBODY system.

Below is a list of topics recommended for your advanced training session. At the beginning of your training session, the trainer will ask which topics you would like to discuss; please select 1-3 topics for your trainer to cover. Topics A, B, and C generally require a half to a full session to review.

A. Customer Relationship Management
   - Client Types, Client Indexes and the Client Index Report
   - Contact Logs and the Contact Log Report
   - Using Reps
   - Prospect Tracking

B. Advanced Product Management
   - Inventory Tickets
   - Purchase Orders
   - Inventory Reports
   - Cost of Goods Sold Report

C. Site Customization
   - Language Settings
   - Appointment Options
   - Class and Event Options
   - General Setup and Options

D. Rapid Student Sign In
   - Issuing Barcode IDs
   - Client Self Sign In
   - Sign In Tab

E. Tagging Clients

F. Financial Reports

G. Marketing Reports

H. Analysis Reports

I. Attendance Reports

These topics are only a recommendation. If you have a feature, which was not covered during Startup Training, and you would like to learn how to utilize this feature, please do not hesitate to ask.

Merchant Account Processing Training

If you applied and were approved for a merchant account, you will need to complete Merchant Account Processing (MAP) Training.

The purpose of this training is to learn how to process credit cards and verify that funds are deposited to your bank account within 2-3 business days.

If you are not using integrated merchant account processing, please contact us at 1-877-755-4279 or email us at map@mindbodyonline.com to learn more or complete an online application.

Merchant Account Processing Training Checklist

✓	**Item**	**Location**	**Description**
	Run a swiped transaction	Retail Tab	Run one swiped transaction
	Run a keyed/stored transaction	Retail Tab	Run one keyed transaction
	Batch and settle a transaction	Payment Processing>Batch and Review	Settle a transaction for refund and credit exercises later
	Batch and Review Reports	Payment Processing>Batch and Review	Review the batch and review report, voided transaction report, and settled transaction report
	Issue a credit card credit by returning a transaction	Payment Processing>Batch and Review OR Client Info – All Purchases	Issue a credit card credit by refunding an item
	Void the remaining credit card transactions	Payment Processing>Batch and Review OR Client Info – All Purchases	Remove or void all remaining unsettled transactions.
	Create an auto-renew schedule	Client Contact Info - Schedule New AutoPay	Schedule an AutoPay schedule
	Review the auto renew reports	Payment Processing	Understand AutoPay Summary, AutoPay Detail, AutoPay Expiration and CC Expiration reports
	Remove scheduled auto pays	Client Info – Profile – AutoPay Schedule	Remove the scheduled AutoPays
	Setup SmartBatching	Toolbox>Setup>Options>General Setup and Options	*SmartBatching will automatically batch and settle your credit card transactions at the end of each day.
***When using SmartBatching, businesses must be in the habit of reviewing the Batch and Review screen to confirm that all credit card transactions have settled properly. If transactions were not settled automatically, then the business must manually settle the transactions**			