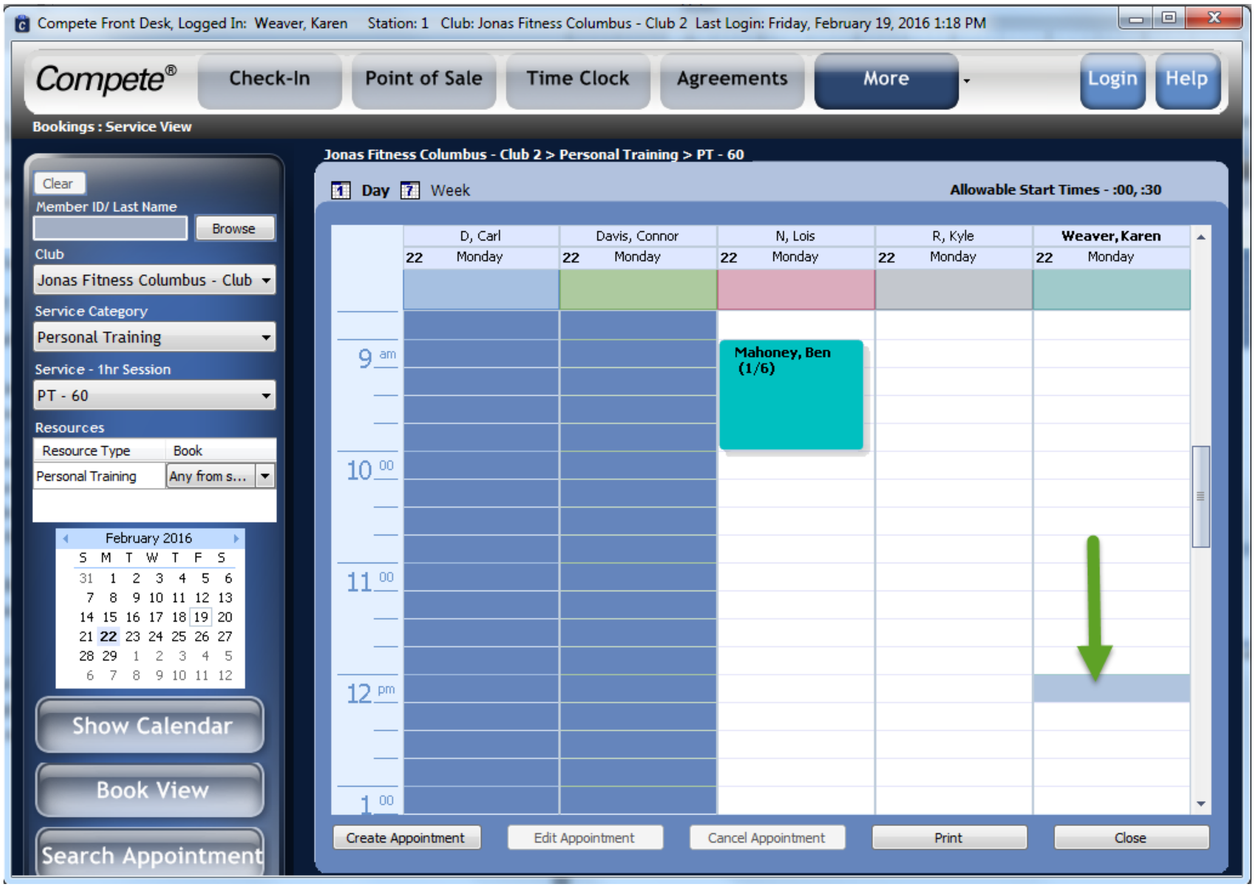
# Bookings, PT Check-In & Employee Self Service (ESS)

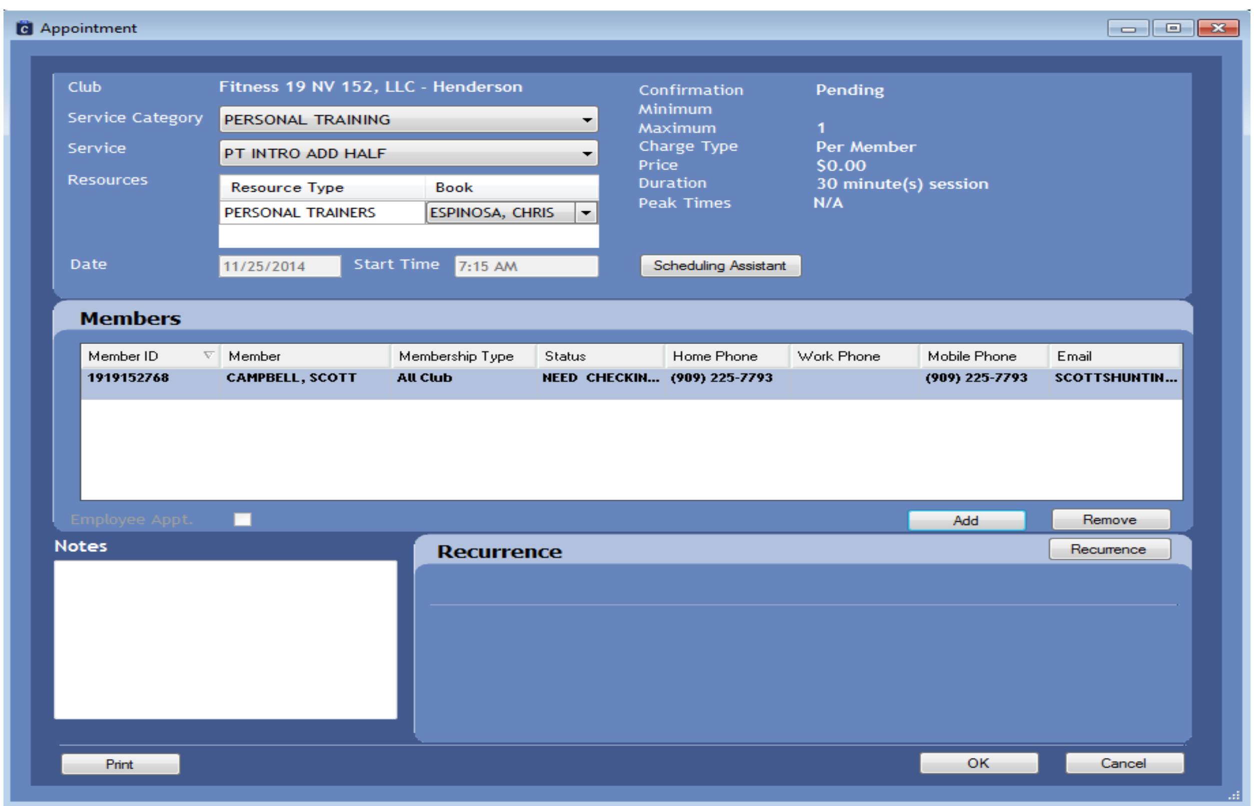
Personal Training is sold via a Point of Sale button. Once the sessions are sold, you can book the member appointment with the trainer from Compete Front Desk or ESS.

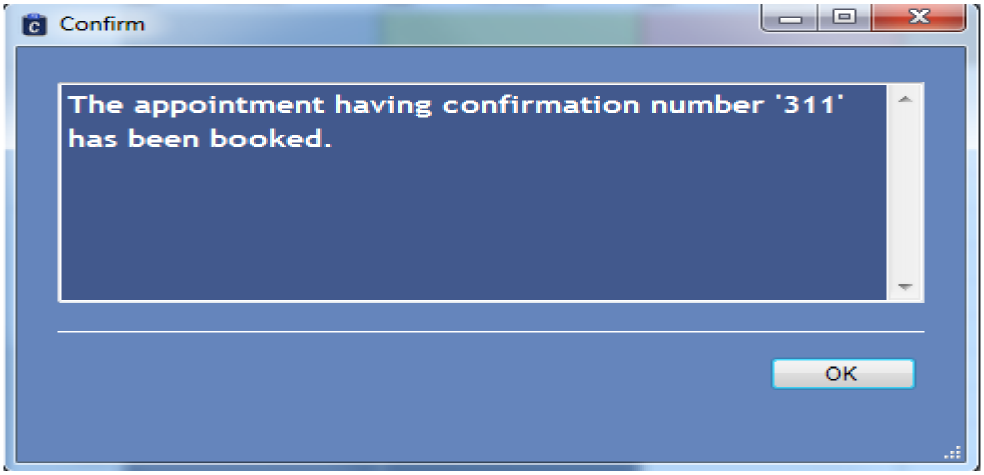
Use Service or Book View or ESS to create, edit, and cancel appointments.

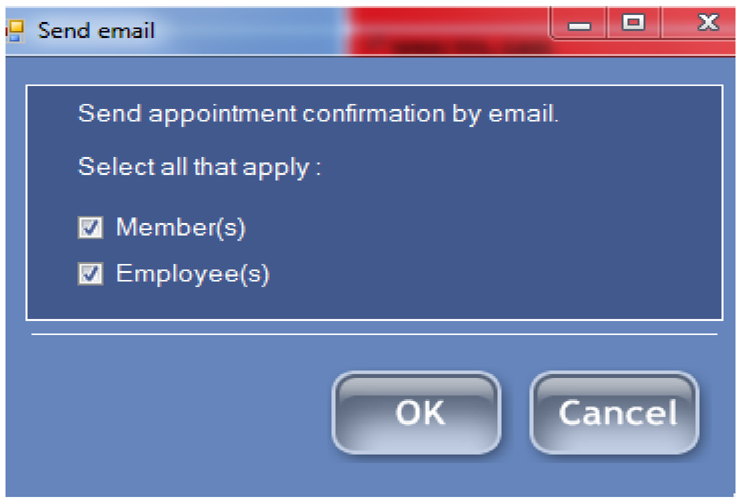
## How to Use Service View

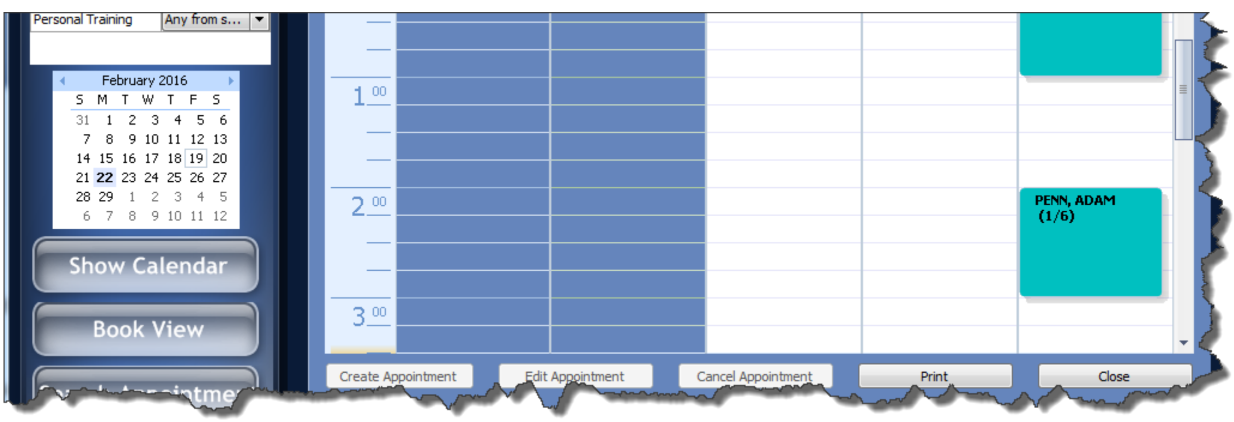
- ✓ Browse for Member
- ✓ Select Club
- ✓ Select Service Category
- ✓ Select Trainer from Book drop down
- ✓ Select Service – IMPORTANT, select the service the member purchased. There are member and non-member products, with appointment durations between 30-60 minutes.
- ✓ Under Books, use the drop down and select the trainer.
- ✓ Click a day on the calendar
- ✓ Double click on time to add member or highlight a time and click Create appointment.
- ✓ Optional- Click Recurrence to create a series of recurring appointments.
- ✓ Optional – Add notes if applicable
- ✓ Click OK
- ✓ Click OK to the confirmation window
- ✓ Click OK to send appointment confirmation email to member or trainer. Select all that apply.
- ✓ Click CANCEL not to send email


Compete Front Desk, Logged In: Weaver, Karen Station: 1 Club: Jonas Fitness Columbus - Club 2 Last Login: Friday, February 19, 2016 1:18 PM
Compete®
Check-In
Point of Sale
Time Clock
Agreements
More
Login
Help
Bookings : Service View
Clear
Member ID/ Last Name
Browse
Club
Jonas Fitness Columbus - Club
Service Category
Personal Training
Service - 1hr Session
PT - 60
Resources
Resource Type
Book
Personal Training
Any from s...
February 2016
S M T W T F S
Show Calendar
Book View
Search Appointment
Jonas Fitness Columbus - Club 2 > Personal Training > PT - 60
Day
Week
Allowable Start Times - :00, :30
D, Carl
Davis, Connor
N, Lois
R, Kyle
Weaver, Karen
22 Monday
Mahoney, Ben (1/6)
9 am
10 00
11 00
12 pm
1 00
Create Appointment
Edit Appointment
Cancel Appointment
Print
Close


Appointment
Club
Fitness 19 NV 152, LLC - Henderson
Service Category
PERSONAL TRAINING
Service
PT INTRO ADD HALF
Resources
Resource Type
Book
PERSONAL TRAINERS
ESPINOSA, CHRIS
Date
11/25/2014
Start Time
7:15 AM
Confirmation
Pending
Minimum
Maximum
1
Charge Type
Per Member
Price
$0.00
Duration
30 minute(s) session
Peak Times
N/A
Scheduling Assistant
Members
Member ID
Member
Membership Type
Status
Home Phone
Work Phone
Mobile Phone
Email
1919152768
CAMPBELL, SCOTT
All Club
NEED CHECKIN...
(909) 225-7793
(909) 225-7793
SCOTTSHUNTIN...
Employee Appt.
Add
Remove
Notes
Recurrence
Recurrence
Print
OK
Cancel



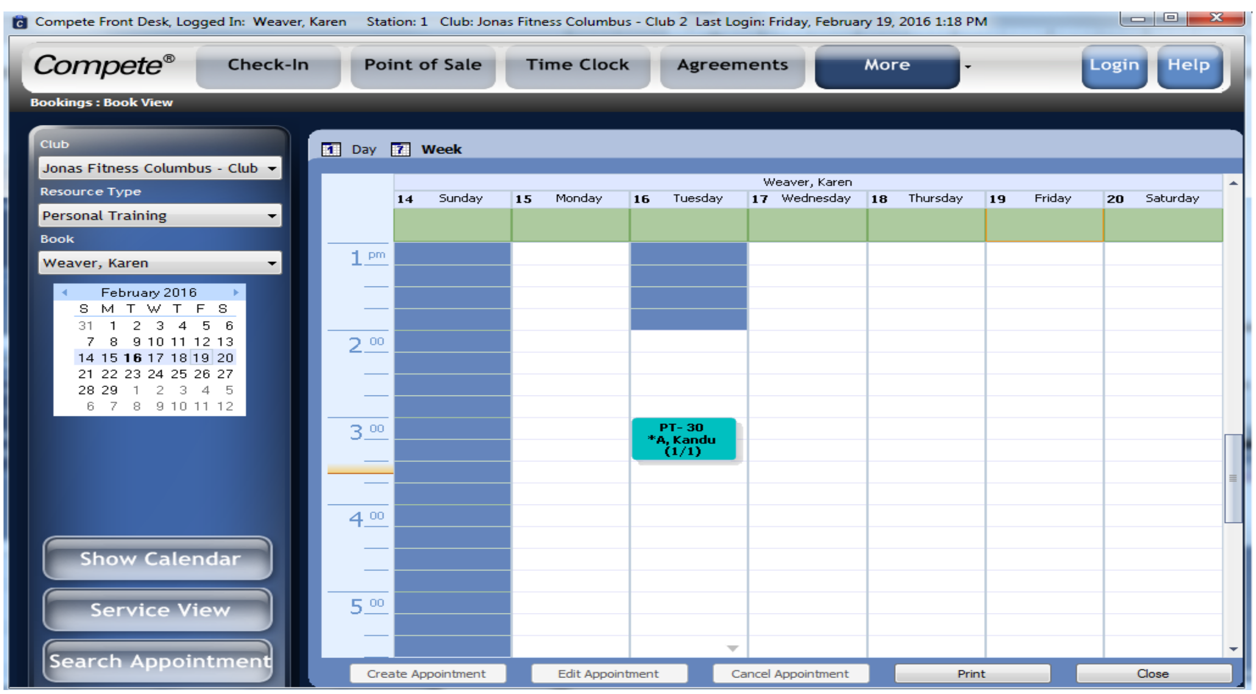



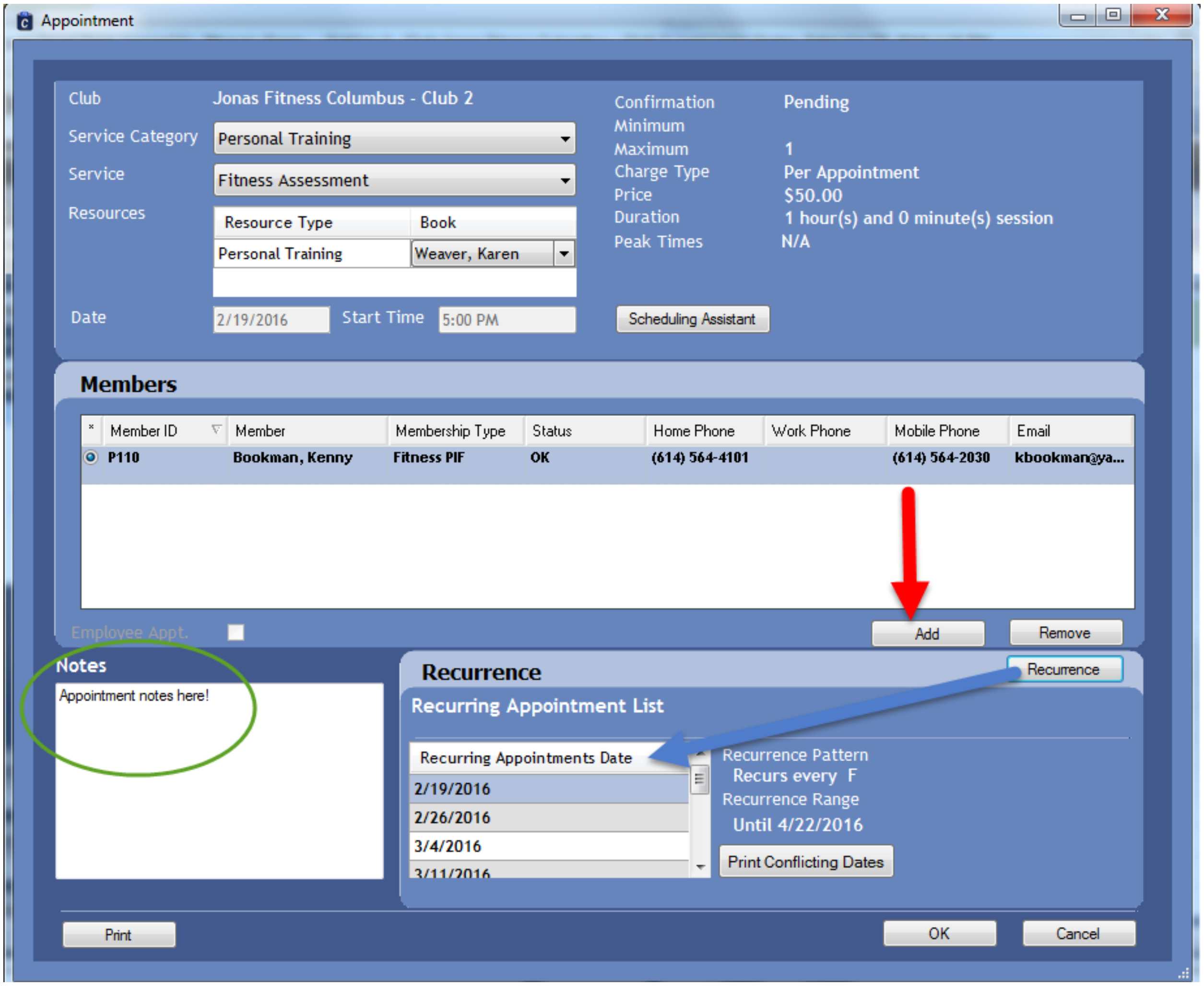

NOTE: The '1/6' above on Penn, Adam's appointment means he is one of six members that can be added to the appointment. Example: Small Group PT.

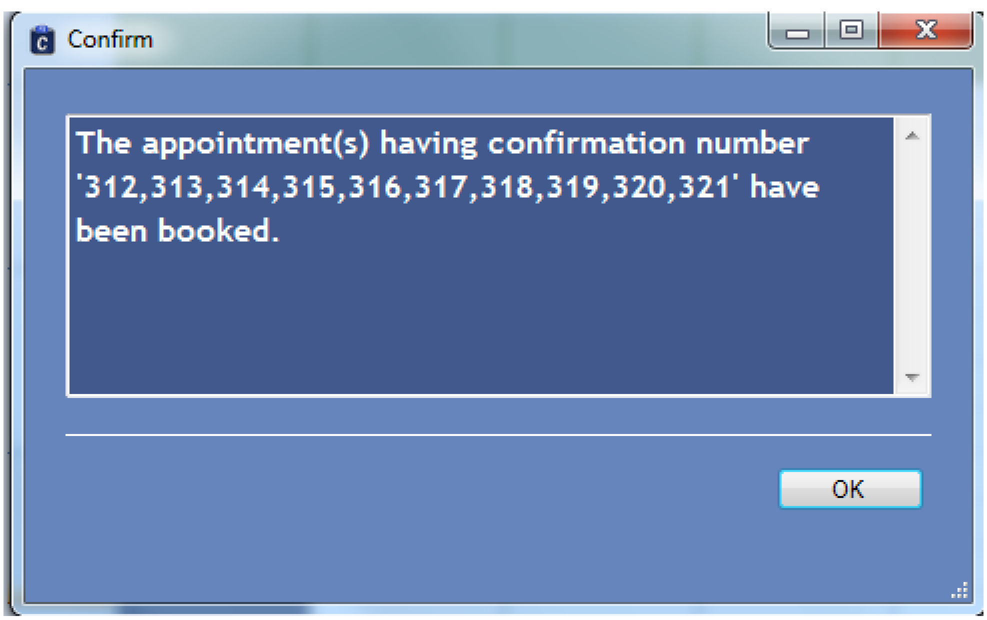
It does NOT denote the number of sessions remaining/sold.

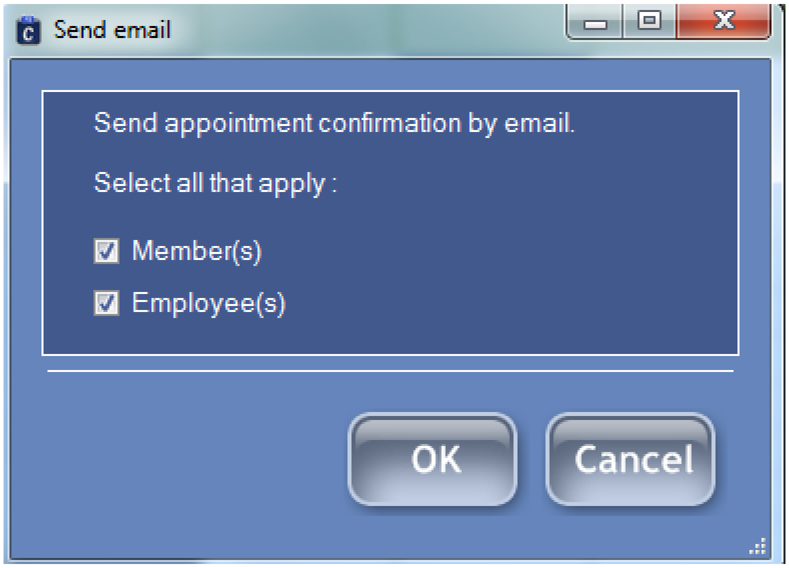
# How to Use Book View

- ✓ Select Club
- ✓ Select Resource Type
- ✓ Select Book - use the drop down to select your name or "any from" to see all trainers' availability.
- ✓ Click a date on the calendar
- ✓ Click Show Calendar
- ✓ Double click on an open time slot
- ✓ Select a Service Category
- ✓ Select a Service - IMPORTANT - select the service the member purchased. There are member and non-member products, with appointment durations between 30-60 minutes.
- ✓ Click Add Member
- ✓ Click OK
- ✓ Click OK to the confirmation window
- ✓ Click OK to send appointment confirmation email to member or trainer. Select all that apply.
- ✓ Click CANCEL not to send email




Appointment
Club
Jonas Fitness Columbus - Club 2
Service Category
Personal Training
Service
Fitness Assessment
Resources
Resource Type
Book
Personal Training
Weaver, Karen
Date
2/19/2016
Start Time
5:00 PM
Confirmation
Pending
Minimum
Maximum
1
Charge Type
Per Appointment
Price
$50.00
Duration
1 hour(s) and 0 minute(s) session
Peak Times
N/A
Scheduling Assistant
Members
Member ID
Member
Membership Type
Status
Home Phone
Work Phone
Mobile Phone
Email
P110
Bookman, Kenny
Fitness PIF
OK
(614) 564-4101
(614) 564-2030
kbookman@ya...
Employee Appt.
Add
Remove
Notes
Appointment notes here!
Recurrence
Recurrence
Recurring Appointment List
Recurring Appointments Date
2/19/2016
2/26/2016
3/4/2016
3/11/2016
Recurrence Pattern
Recurs every F
Recurrence Range
Until 4/22/2016
Print Conflicting Dates
Print
OK
Cancel


Confirm
The appointment(s) having confirmation number '312,313,314,315,316,317,318,319,320,321' have been booked.
OK




# PT Check-In

Member/guests must be checked in for Personal Training in order to decrement a visit and to pay commission to the trainer.

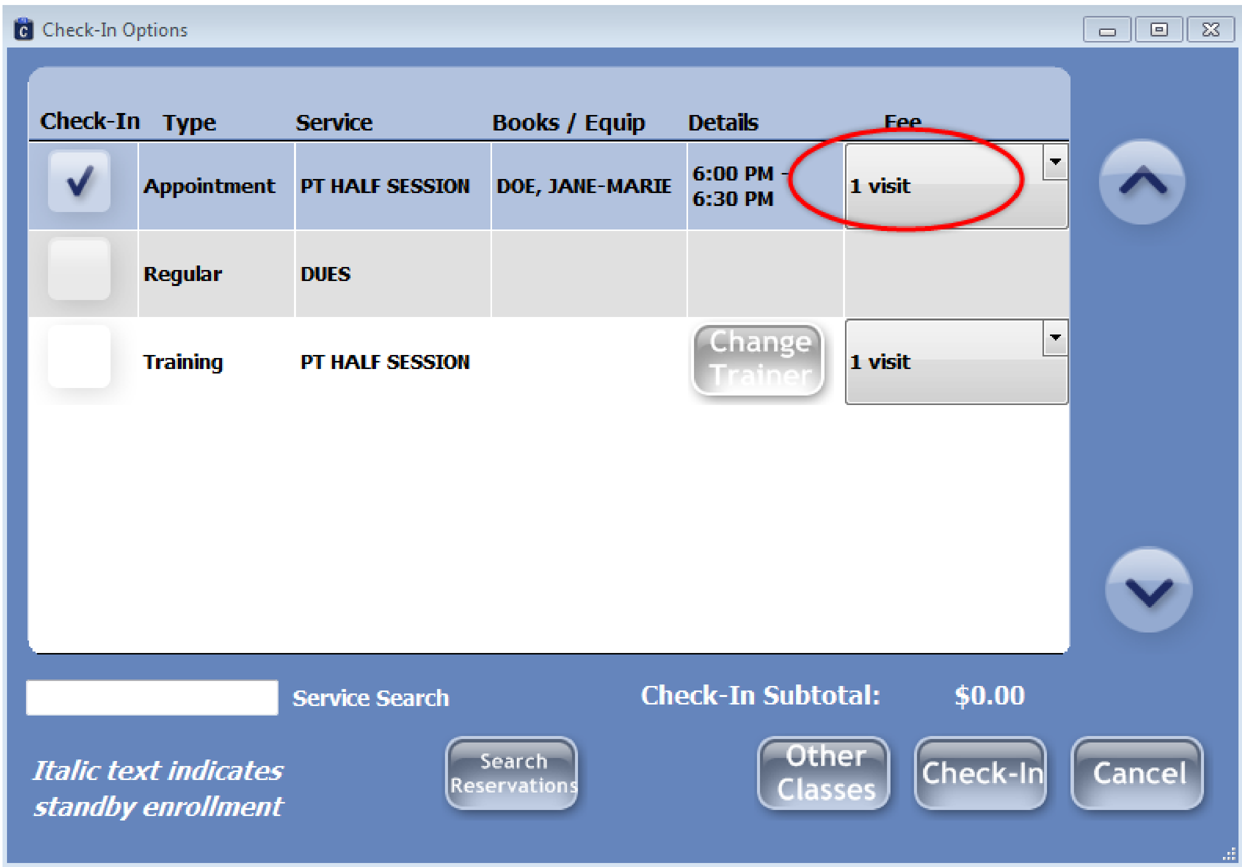
- ✓ From the Check-In menu > Search member
- ✓ Click Check-In,
- ✓ The check-in options menu opens
- ✓ For booked sessions, Appointment will be the default check-in
- ✓ For non-booked sessions, select Training, click change trainer, to insert trainer name
- ✓ Click Check-In

# 4 Different PT Check-In Scenarios

There are four different PT check-in views below. Each describes a different scenario.

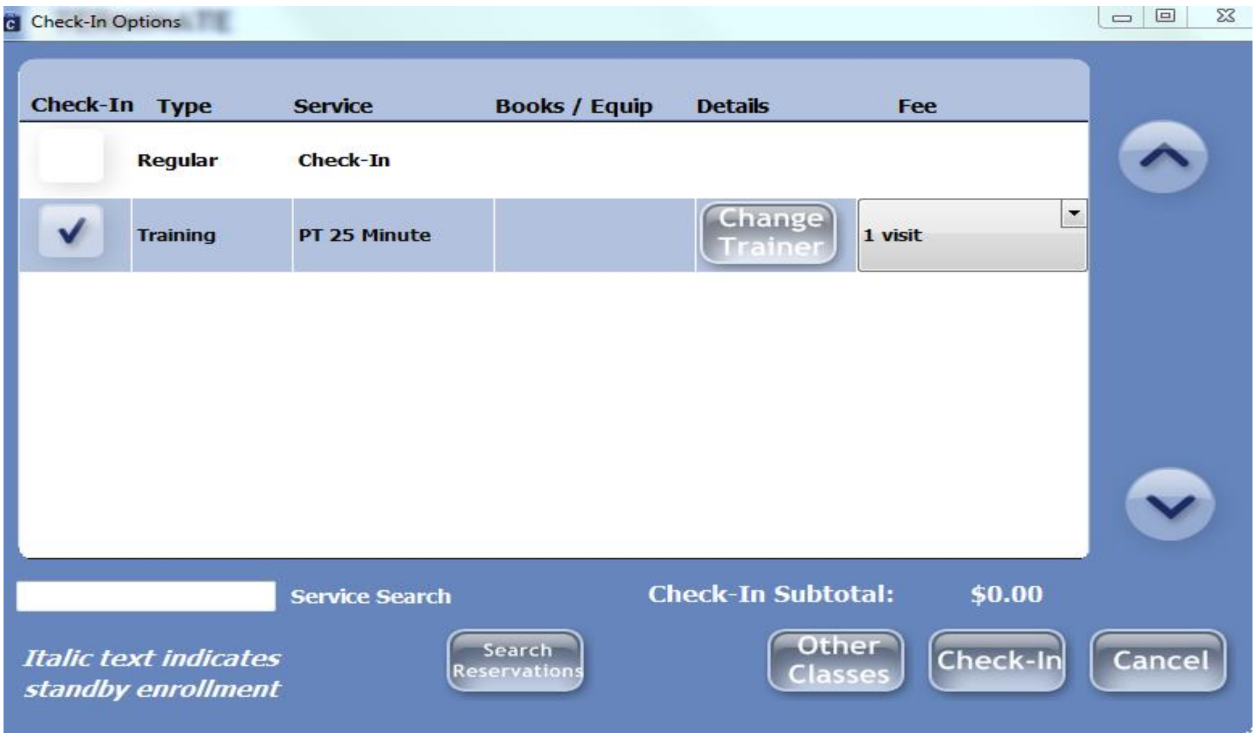
1. This member has pre-paid (purchased) training, booked an appointment & is checking -in for their appointment.

This is an ideal scenario!

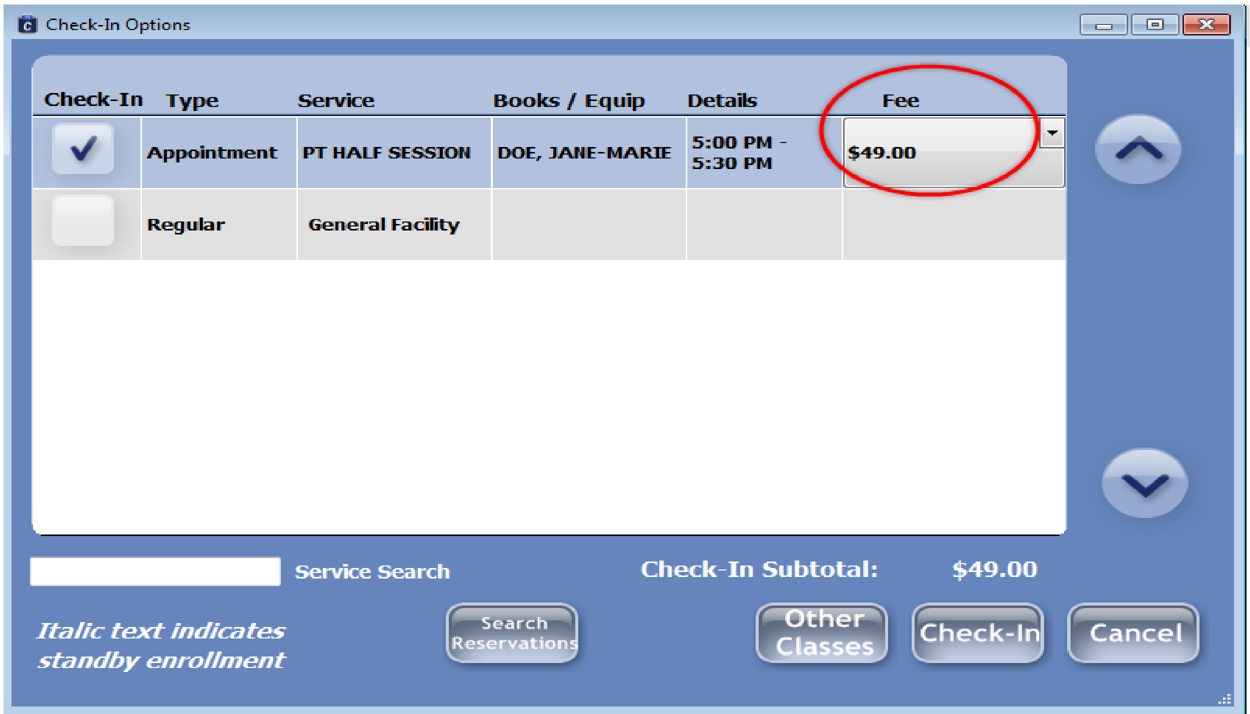


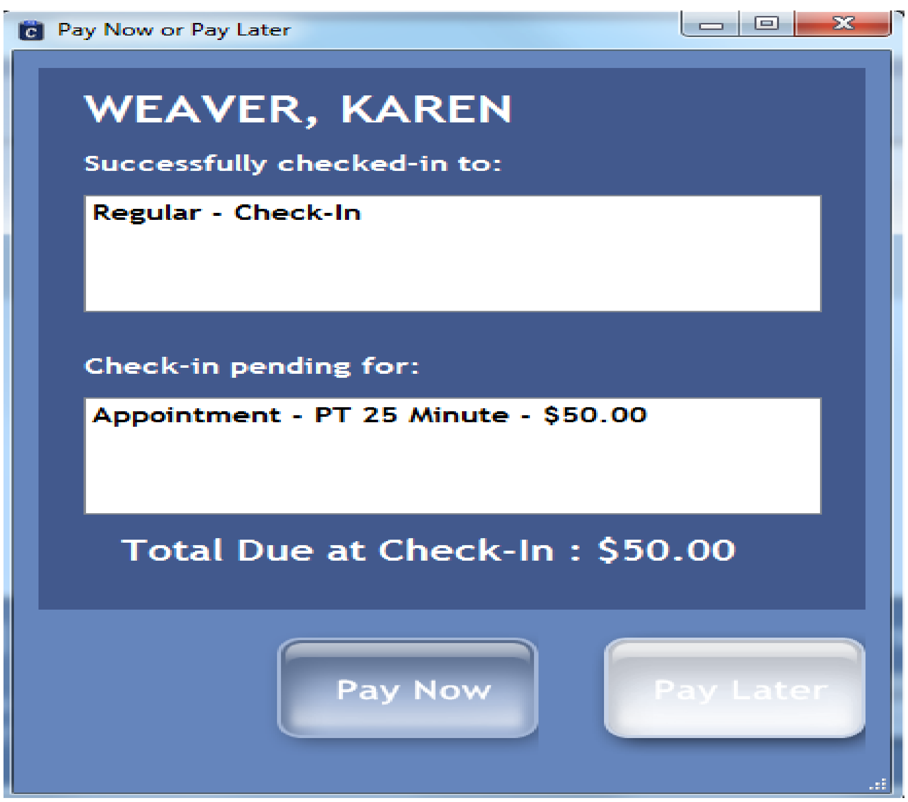
2. This member did not make an appointment, has pre-paid training on file and is checking in for training.

An example of this is a member was working out in the gym, noticed her trainer was available and asked to be trained.



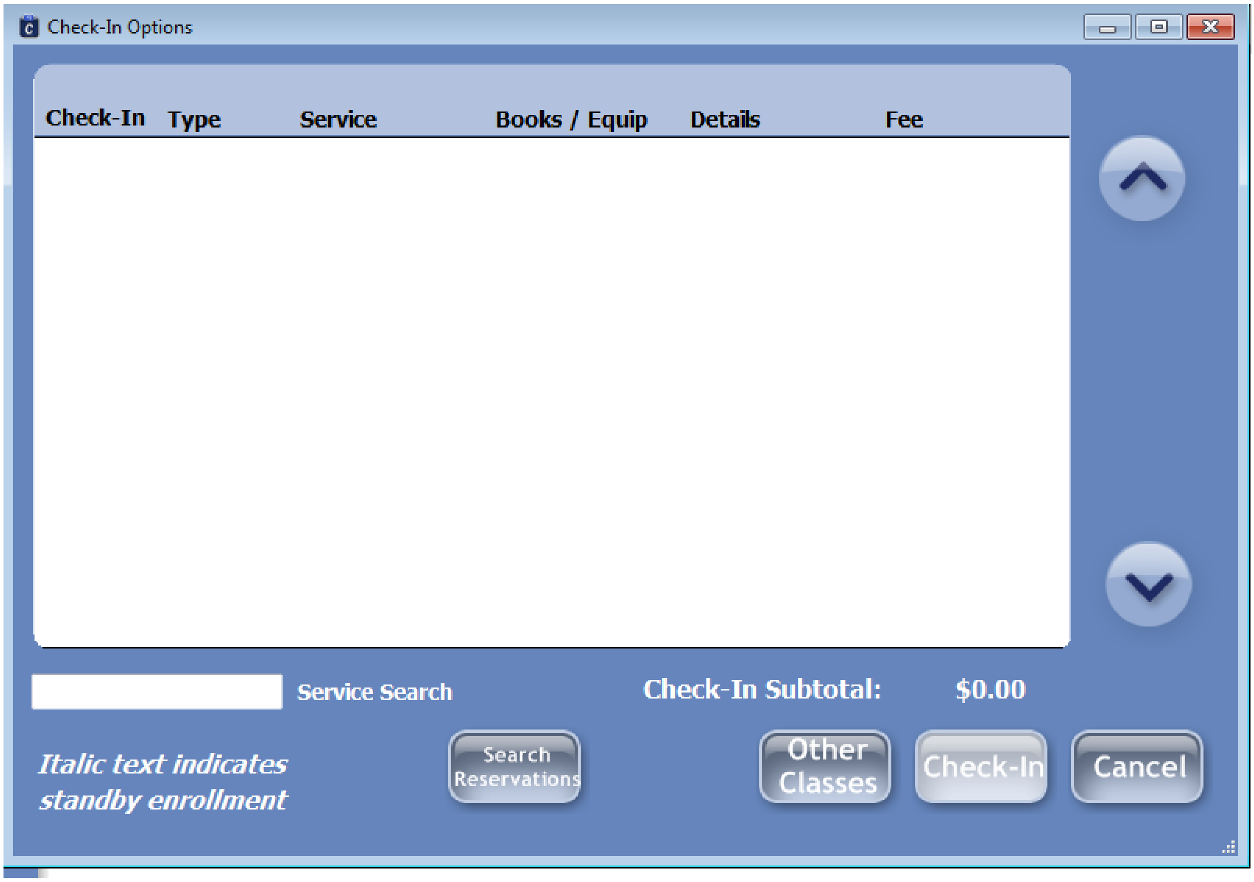
3. This member did not prepay for training but made an appointment with jane-Marie. By default, Compete is going to charge the member the single session price since this member does not have any PT pre-purchased.



4. The member has not booked a single session nor do they have any Prepaid PT.

There is no way to check this member for training. Time to buy more!




# Training & Booking Reports

Front Desk > More > Reports > Products > Training >

- ✓ **Remaining by Member:** Displays the number of training sessions remaining for a member.
- ✓ **Usage by Member:** Displays training usage by member.
- ✓ Booking Reports

Back Office > Reports > Products > Training

- ✓ **Instructors Commission's Report -** Used for Trainer payroll purposes

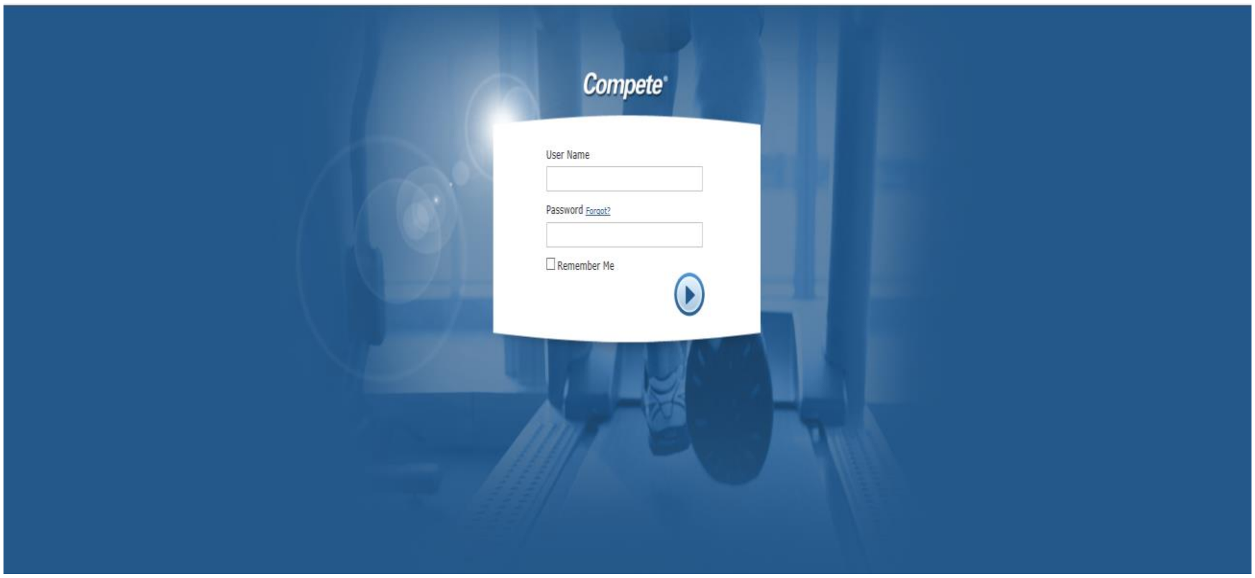
Back Office > Booking > **Bookings Commissions** –Any training product used but not booked will not appear on this report.

# Compete Employee Self Service (ESS)

Employee Self Service LINK for Personal Trainers to access their calendars from any computer or smart phone.

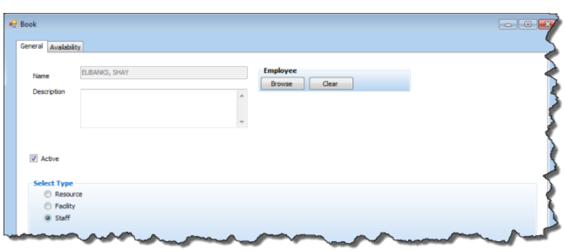
CERT Training Link: https://cert.memberselfservice.com/510277

LIVE PRODUCTION LINK https://www.competeselfservice.com/510277




## 1. *Trainer Notes*

- ✓ Each Trainer must be set up as an Employee in Compete. Data Entry > Employees > Browse Employees
- ✓ Each Trainer must be set up as a Book in Compete via Data Entry > Booking > Books
    - Click Browse to locate the trainer (required)
    - Availability – decision needed. Will club coordinator or trainer add their training availability?



## *2. Introduction*

Compete Employee Self Service (ESS) is a Jonas-hosted website provided by Jonas Fitness Inc., to Compete customers. It allows for the creation of appointments via the Internet without being tied to the Bookings module via the Compete desktop version.

Employee Self Service is designed to work on the following devices:

- ✓ iPhone
- ✓ iPad
- ✓ Mac Book
- ✓ Android tablets
- ✓ Android phones

The following browsers can be used with Employee Self Service:

- ✓ Internet Explorer version 8 or higher
- ✓ Mozilla Firefox 8 or higher
- ✓ Google Chrome 16 or higher
- ✓ Safari 5 or higher

## *3. Employee Self Service (Desktop Version)*

***a) Log In*** - Users login using their Compete desktop version username and password. The same rules apply as in Compete including passwords are required to be reset at a specific amount of time. If the password needs to be reset, ESS will automatically prompt the user to reset.

***b) Forgot Password* -** If a user forgets his password, he will need to enter his username and the same password configured in Compete for his account. These must match; otherwise he cannot use ESS to reset his password. If there is a match, an email is sent with a link to change his password. Again, all rules in Compete also apply to password changes in ESS.

### *c.) Settings*

There are specific settings that users can modify in ESS including their default view, availability information, and change their password. These are all accessed via the Settings link in the upper right corner of the screen.

i. Calendar View - This screen allows the user to modify which view they want to use for their calendar by default and what time range they would like to see by default on the calendar view.

ii. Availability - Users can add, modify and delete their availability records in ESS.

iii. Change Password - Users can change their ESS/Compete passwords from ESS. Again, the same Compete rules apply on length, special characters and frequency of same passwords used.

### *c) Calendar*

When the user logs in, his calendar is the first screen to appear. He can configure the start/end time he would like the calendar to display for and if he would like the default view to be monthly, weekly or daily upon login. There are also filtering options to only display appointments for specific clubs or specific services.

i. Monthly View
ii. Weekly View
iii. Daily View

### *d) Scheduling Appointments*

To schedule an appointment, the user will click on the "Add" link. Details for the appointment are selected, including club location, type of service (category), service, and any other resources that might be required on the appointment.

i. The user can select an "Employee Appointment" which means no member are added to the appointment or can search/add members.
ii. Search Members - Once members are added, the user hits the Save button and is returned to the calendar.

### *e) Editing or Cancelling Appointments*

i. Users can click on appointments from the calendar view in order to edit or cancel them. When editing only the time or members can be changed on the appointment.
ii. Profile Screen

### *f) Member Directory*

Off of the main screen, using the middle icon in the top middle row of circular icons, the user can access a member directory to get details for specific members. Users can save certain members as "favorites" allowing them to easily locate these members in the directory without searching.

i. Favorites screen
ii. Member Profile

### *g) Message Inbox*

Anytime an appointment is added, edited, or cancelled the user will receive a message in their ESS inbox. This is the third in the middle row of circular icons at the top of the screen. Once the message is read, the message is archived.

***h)*** User Guide

Click the help menu in Compete to access the complete Employee Self Service User Guide.


FRONT DESK HELP ICON

BACK OFFICE HELP ICON