# Appointment Book

## Appointment Book Overview

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
</table>

Using the Appointment Book includes this one step:

**Step 1:** Select the **Appointment Book** tab.

### Step 1. Click the Appointment Book tab

![Appointment Book Task Menu](image1)

### Appointments Task Menu

- Appointments
- Set FA Appointment
- No FA Appt Set
- Set Workout
- Set I RM
- Set W/M Appt
- Complete Coaching
- Schedule Class
- Recurring Appointments
- Staff Time Off

### Administration Task Menu

- Manage Announcements
- New Announcement

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<table>
<thead>
<tr>
<th>Contact MIAs Task Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Task Menu</strong></td>
</tr>
<tr>
<td>- Appointments</td>
</tr>
<tr>
<td>- Administration</td>
</tr>
<tr>
<td>- Contact MIAs</td>
</tr>
<tr>
<td>- Absent 1 Week</td>
</tr>
<tr>
<td>- Absent 2 Weeks</td>
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<tr>
<td>- Absent 3 Weeks</td>
</tr>
<tr>
<td>- Non-Attending 4 Weeks +</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Contact Leads Task Menu</th>
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</thead>
<tbody>
<tr>
<td><strong>Task Menu</strong></td>
</tr>
<tr>
<td>- Appointments</td>
</tr>
<tr>
<td>- Administration</td>
</tr>
<tr>
<td>- Contact MIAs</td>
</tr>
<tr>
<td>- Contact Leads</td>
</tr>
<tr>
<td>- Search Leads</td>
</tr>
<tr>
<td>- Add a BR/Lead</td>
</tr>
<tr>
<td>- New Leads</td>
</tr>
<tr>
<td>- Aged 1 Week</td>
</tr>
<tr>
<td>- Aged 2 Weeks</td>
</tr>
<tr>
<td>- Aged 3 Weeks</td>
</tr>
<tr>
<td>- Aged 4 Weeks +</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Unfinished Business Task Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Task Menu</strong></td>
</tr>
<tr>
<td>- Appointments</td>
</tr>
<tr>
<td>- Administration</td>
</tr>
<tr>
<td>- Contact MIAs</td>
</tr>
<tr>
<td>- Contact Leads</td>
</tr>
<tr>
<td>- Unfinished Business</td>
</tr>
<tr>
<td>- Incomplete Appointments</td>
</tr>
<tr>
<td>- Payments Due</td>
</tr>
<tr>
<td>- Warning Messages</td>
</tr>
</tbody>
</table>

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# Special Promo Appointment Book Tab Highlights

<table>
<thead>
<tr>
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</tr>
</thead>
</table>

Using the Special Promo(s) tab in the Appointment Book includes these highlights:

**Highlight 1:** Hover (pause) over the Member Name to reveal which Special Promo the member is participating in.

**Highlight 2:** The Member name will display here for the 30 days **before and after** the Special Promo End Date. A red negative number (i.e., -9) means the member has already past her End Date and now has a “Cancel” status.

**NOTE:** Once the member is converted to a regular Curves Membership Type the member name will be removed from this list.

**Highlight 3:** Single-click Member Name to go directly to the Membership Agreement tab.

Review this area regularly along with the Due to Expire report so as to convert these Special Promo members to 12 month draft members as soon as possible!

The Special Promo tab will display special promo members that are due to expire within the next 30 days and up until the next 7 days.

**Highlight 1. Reveal the Special Promo name**

Pause the mouse over the Member Name and the applicable Special Promo will display.
Highlight 2.
# of Days left on Special Promo and # of Days past the End Date

Member will display for 30 days before the Special Promo End Date and for 7 days after. This gives the club the chance to convert this Special Promo member to a regular Curves membership.

Highlight 3.
Single-click Member Name to go to Membership Agreement tab

(1) Single-click the Member Name and (2) click Edit to Convert Membership type.

Managing Staff Time Off

Updated 8-Feb-16
Managing staff time off includes these 3 steps:

Step 1: Click the **Appointment Book** tab.

Step 2: From the **Appointments Task Menu**, click **Staff Time Off**.

Step 3: Once the Staff Time Off calendar displays, choose to view by either Day, Week or Month.

**NOTE:** If no Staff Time Off requests have been scheduled from within Staff Admin, nothing will happen or display when you click **Staff Time Off** from the Appointment Book Task Menu.

To edit an existing Staff Time Off or create a new request, go to **Staff Admin** and then from the **Staff Admin Task Menu**, click **Staff Time Off Management**. For detailed instructions, go to **Staff Admin > Staff Management Task Menu** in the Online User Guide.

### Step 1.
**Go to Appointment Book**

![Appointment Book](image)

**Click**

### Step 2.
**Click Staff Time Off**

![Task Menu](image)

**Click**

### Step 3.
**Review Staff Time Off by Day, Week or Month**

![Calendar](image)
Appointments Task Menu

Scheduling FA Appointments

Setting a FA [Consultation] Appointment

Updated 8-Feb-16

How to set a FA Appointment

Setting a FA [Consultation] Appointment includes these 4 steps:

Step 1: Select the Appointment Book tab.

Step 2: From the Appointments Task Menu select Set FA Appointment.

Step 3: Complete appointment details.

Step 4: Click Save & Close.

Step 1. Go to Appointment Book

Step 2. Choose Set FA Appointment

(1) Select Appointments from the Task Menu and (2) click Set FA Appointment.
Step 3.
Complete FA Appointment Details

Special Promotions Drop-down Menu Note:

Some Special Promotions are affiliated with a specific membership type. When this type of special promotion is chosen from the drop-down menu, OS will automatically show only this Special Promo (along with the basic membership types) in the New Member Wizard- Membership Type Drop-Down. Any other Special Promo will NOT display.

(Optional)

Once a Note/Comment is saved within a given appointment, a little “notebook” icon will show up on the Appointment as a reminder!

Step 4.
Click Save & Close

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Recording a No FA Appointment Set

| Updated   | 8-Feb-16 |
Recording a “No FA Appointment Set” includes these 4 steps:

Step 1: Select the **Appointment Book** tab.

Step 2: From the **Appointments** Task Menu select **No FA Appt Set**.

Step 3: Complete **No FA Appointment Set** details.

Step 4: Click **Save & Close**.

---

<table>
<thead>
<tr>
<th>Step 1. Go to Appointment Book</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Appointments Book" /></td>
</tr>
</tbody>
</table>

**Click**

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<table>
<thead>
<tr>
<th>Step 2. Choose No FA Appt Set</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Task Menu" /></td>
</tr>
</tbody>
</table>

(1) Select Appointments from the Task Menu and (2) click No FA Appt Set.

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<table>
<thead>
<tr>
<th>Step 3. Complete No FA Appointment Set Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="No FA Appointment Set" /></td>
</tr>
</tbody>
</table>

**Contact Origin:**

**Staff Name:**

**Contact Date:**

**First Name:**

**Last Name:**

**Contact Number:**
### Setting a FA Appointment from a BR/Lead

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
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</thead>
<tbody>
<tr>
<td>How to set a FA Appt for a collected BR/Lead</td>
<td>Setting a FA Appointment for a BR/Lead includes these 7 steps:</td>
</tr>
<tr>
<td>Step 1:</td>
<td>Select the Appointment Book tab.</td>
</tr>
<tr>
<td>Step 2:</td>
<td>From the Contact Leads Task Menu select Search Leads.</td>
</tr>
<tr>
<td>Step 3:</td>
<td>Check-off Active Leads or Inactive Leads, Search Leads by Name or Search Leads by Date Range. Enter the applicable name or date and click Search.</td>
</tr>
<tr>
<td>Step 4:</td>
<td>Click View Details.</td>
</tr>
<tr>
<td>Step 5:</td>
<td>Click Set Appointment.</td>
</tr>
<tr>
<td>Step 6:</td>
<td>Complete FA Appointment details.</td>
</tr>
<tr>
<td>Step 7:</td>
<td>Click Save &amp; Close.</td>
</tr>
</tbody>
</table>

### Step 4.
**Click Save & Close**

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### Step 2. Choose Search Leads

1. Select Contact Leads from the Task Menu and (2) click Add a BR/Lead.

### Step 3. Filter the List of BRs/Leads to be Displayed

1. Click to search by Active Leads and/or Inactive Leads, (2) search leads by entering a specific First and/or Last Name or Search Leads by Date Range, and then (3) click Search.

### Step 4. Click View Details

Click View Details.
Step 5. Click Set Appointment

Step 6. Complete FA Appointment Details

Special Promotions Drop-down Menu Note:

Some Special Promotions are affiliated with a specific membership type.
When this type of special promotion is chosen from the drop-down menu, OS will automatically show only this Special Promo (along with the basic membership types) in the New Member Wizard- Membership Type Drop-Down. Any other Special Promo will NOT display.

Step 7. Click Save & Close

Remember to “Update” the appointment at each phase of the process by checking off the appropriate status.

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Scheduling Other Appointments

Setting a Workout

Updated 8-Feb-16

| How to set a Workout | Setting a Workout Appointment includes these 4 steps:
<table>
<thead>
<tr>
<th></th>
<th></th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Step 1: Select the <strong>Appointment Book</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the <strong>Appointments</strong> Task Menu select <strong>Set Workout</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Complete the appointment details.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Click <strong>Save &amp; Close</strong>.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 1. Go to Appointment Book</th>
<th><img src="image1" alt="Appointment Book" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>Click</td>
<td><img src="image2" alt="Click" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2. Choose Set Workout</th>
<th><img src="image3" alt="Task Menu" /></th>
</tr>
</thead>
<tbody>
<tr>
<td>(1) Select Appointments from the Task Menu and (2) click Set Workout.</td>
<td></td>
</tr>
</tbody>
</table>
Step 3. Complete Appointment Details

Once a Note/Comment is saved within a given appointment, a little “notebook” icon will show up on the Appointment as a reminder!

Step 4. Click Save & Close

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Setting a Refresher Workout

Setting a Workout Appointment includes these 4 steps:

Step 1: Select the Appointment Book tab.

Step 2: From the Appointments Task Menu select Set Workout.

Step 3: Complete the appointment details, choosing Refresher from the Workout Appointment Type drop-down menu.

Step 4: Click Save & Close.
<table>
<thead>
<tr>
<th>Step 1.</th>
<th>Go to Appointment Book</th>
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</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Appointment Book" /></td>
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<tr>
<td></td>
<td><strong>Click</strong></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2.</th>
<th>Choose Set Workout</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Task Menu" /></td>
</tr>
<tr>
<td></td>
<td><strong>1</strong> Select Appointments from the Task Menu and <strong>2</strong> click Set Workout.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3.</th>
<th>Complete Appointment Details</th>
</tr>
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<tbody>
<tr>
<td></td>
<td><img src="image" alt="Appointment" /></td>
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</table>

<table>
<thead>
<tr>
<th>(Optional)</th>
<th><img src="image" alt="Appointment Comment History" /></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Click</strong></td>
</tr>
</tbody>
</table>

Once a Note/Comment is saved within a given appointment, a little “notebook” icon will show up on the Appointment as a reminder!

<table>
<thead>
<tr>
<th>Step 4.</th>
<th>Click Save &amp; Close</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><img src="image" alt="Save &amp; Close" /></td>
</tr>
<tr>
<td></td>
<td><strong>Click</strong></td>
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</tbody>
</table>

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### Setting a 1 RM Appointment

**How to set a 1 RM Appointment**

Setting a 1 RM Appointment includes these 4 steps:

1. Go to **Appointment Book**

2. Choose **Set 1 RM**

3. Add **Appointment Details**

#### Step 1: Select the **Appointment Book** tab.

#### Step 2: From the **Appointments** Task Menu select **Set 1 RM**.

#### Step 3: Complete appointment details.

#### Step 4: Click **Save & Close**.

(1) Select Appointments from the Task Menu and (2) click **Set 1 RM**.

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**Updated**: 8-Feb-16

**How to set a 1 RM Appointment**:

- **Step 1**: Select the **Appointment Book** tab.
- **Step 2**: From the **Appointments** Task Menu select **Set 1 RM**.
- **Step 3**: Complete appointment details.
- **Step 4**: Click **Save & Close**.

---

**Step 1. Go to Appointment Book**

![Appointment Book tab](image)

**Step 2. Choose Set 1 RM**

1. Select **Appointments**
2. Choose **Set 1 RM**

**Step 3. Add Appointment Details**

![Appointment details](image)
### Setting a Weigh and Measure Appointment

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
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</thead>
</table>
| How to set a Weigh & Measure Appointment | Setting a W/M Appointment includes these 4 steps:  
Step 1: Select the Appointment Book tab.  
Step 2: From the Appointments Task Menu select Set W/M Appt.  
Step 3: Complete the appointment details.  
Step 4: Click Save & Close. |

<table>
<thead>
<tr>
<th>Step 1. Go to Appointment Book</th>
<th><img src="image" alt="Appointment Book Click" /></th>
</tr>
</thead>
</table>

| Step 2. Choose Set W/M Appt   | ![Task Menu Click](image)  
|                               | (1) Select Appointments from the Task Menu and (2) click Set W/M Appt. |
Step 3. Complete Appointment Details

Once a Note/Comment is saved within a given appointment, a little “notebook” icon will show up on the Appointment as a reminder!

Step 4. Click Save & Close

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Handling a Corporate Set Appointment

Updated 8-Feb-16

Handling a Corporate Set Appointment includes these 4 steps:

Step 1: Select the Appointment Book tab.

Step 2: Left-click on the appointment and choose Update Appointment.

Step 3: Update the appointment details, including marking it as Confirmed and/or changing the appointment date and time.

Step 4: Click Save & Close.

Corporate set appointments are set based on the Appointment Book Hours recorded in Club Setup. Scheduling of corporate set appointments does not take into consideration any existing appointments you may already have scheduled. If there is a scheduling conflict, simply contact the guest to reschedule.
Step 1. Go to Appointment Book

Step 2. Choose Update Appointment

Step 3. Update Appointment Details

Step 4. Click Save & Close

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(Dual-Branded Centers) Setting a Jenny Craig® Weekly Consultation Appointment- Curves OS® Instructions

Updated 8-Feb-16
Setting a JC Weekly Consultation Appointment includes these 4 basic steps:

| Step 1: | Select the **Appointment Book** tab. |
| Step 2: | From the **Appointments** Task Menu select **Set 1 RM** (this is the appointment type that will be selected for this type of “consultation”). |
| Step 3: | Complete appointment details. |
| Step 4: | Click **Save & Close**. |

### Step 1. Go to Appointment Book

![Appointment Book tab](image)

### Step 2. Choose Set 1 RM

1. Select **Appointments** from the Task Menu
2. Click **Set 1 RM**

### Step 3. Add Appointment Details

![Appointment details](image)

(1) Select Appointments from the Task Menu and (2) click Set 1 RM.
Recommended - Specify the type of Jenny Craig consultation by completing the following:

a. **Subsequent Consultation.** Enter the First Name as “Subsequent”- First Name. Enter the Last Name in the Last Name field.

   ![Subsequent Consultation Form]

   - First Name: Subsequent- Sarah
   - Last Name: Jones

b. **Milestone.** Enter the First Name as “Milestone”- First Name. Enter the Last Name in the Last Name field.

   ![Milestone Consultation Form]

   - First Name: Milestone- Sarah
   - Last Name: Jones

(Optional)

Step 4. Click Save & Close

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**Cancelling an Appointment**

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<thead>
<tr>
<th>Updated</th>
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</thead>
<tbody>
<tr>
<td><strong>How to cancel an appointment</strong></td>
<td>Cancelling an appointment includes these 4 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the Appointment Book tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: Left-click on the appointment and choose Update Appointment.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Click Cancel.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Click Save &amp; Close.</td>
</tr>
</tbody>
</table>
Step 1.
Go to Appointment Book

Step 2.
Choose Update Appointment

Step 3.
Click Cancel

Step 4.
Click Save & Close

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**Updating Appointment Details**

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<tbody>
<tr>
<td><strong>How to Update an Appointment</strong></td>
<td>Updating Appointments includes these 4 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the Appointment Book tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: Left-click on the appointment and choose Update Appointment.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Update the appointment details.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Click Save &amp; Close.</td>
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</tbody>
</table>

Step 1.
Go to Appointment Book
Step 2. Choose Update Appointment

Step 3. Update Appointment Details

Step 4. Click Save & Close

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Scheduling Classes

Scheduling a Resolution Class

Updated 8-Feb-16
How to Schedule a Resolution Class

Scheduling a Resolution Class includes these 4 steps:

Step 1: Select the Appointment Book tab.

Step 2: From the Appointments Task Menu select Schedule Class.

Step 3: Select the Class Type from the drop down, enter the Appointment Date, Start Time and End Time. Enter the class Capacity and Instructor Name. (Optional) Click Participants to add participants at this time.

Step 4: Click Save & Close.

The following screenshots are for instructional purposes only. Details will vary by country/location (including class types, monetary values/amounts, symbols, payment methods, date formats, tabs, etc...).

Step 1. Go to Appointment Book

Step 2. Choose Schedule Class

(1) Select Appointments from the Task Menu and (2) click Schedule Class.
Step 3. Complete Class Details

(1) Select the class from the Class Type drop down, (2) enter the Class Date, and then (3) enter the Start and End Time. (4) Enter the Capacity of the class, (5) enter the Instructor Name, and then (6-optinal) click Participants.

(Optional) Add Participants

Step 4. Click Save & Close

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Scheduling a Class
How to schedule a class

Scheduling a Class includes these 4 steps:

Step 1: Select the Appointment Book tab.

Step 2: From the Appointments Task Menu select Schedule Class.

Step 3: Select the Class Type from the drop down, enter the Appointment Date, Start Time and End Time. Enter the class Capacity and Instructor Name. (Optional) Click Participants to add participants at this time.

Step 4: Click Save & Close.

The following screenshots are for instructional purposes only. Details will vary by country/location (including class types, monetary values/amounts, symbols, payment methods, date formats, tabs, etc...).

Step 1. Go to Appointment Book

Step 2. Choose Schedule Class

(1) Select Appointments from the Task Menu and (2) click Schedule Class.
Step 3. Complete Class Details

(1) Select the class from the Class Type drop down, (2) enter the Class Date, and then (3) enter the Start and End Time. (4) Enter the Capacity of the class, (5) enter the Instructor Name, and then (6-optional) click Participants.

(Optional) Add Participants

Step 4. Click Save & Close

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Scheduling a Recurring Class

Updated 8-Feb-16

<table>
<thead>
<tr>
<th>How to schedule a recurring Class</th>
<th>Scheduling a Recurring Class includes these 5 steps:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Step 1: Select the <strong>Appointment Book</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the <strong>Appointments</strong> Task Menu select <strong>Recurring Appointments</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Click <strong>Create New</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Complete appointment details.</td>
</tr>
<tr>
<td></td>
<td>Step 5: Click <strong>Save &amp; Close</strong>.</td>
</tr>
</tbody>
</table>

The following screenshots are for instructional purposes only. Details will vary by country/location (including class types, monetary values/amounts, symbols, payment methods, date formats, tabs, etc...).

**Step 1. Go to Appointment Book**

- ![Appointment Book](image1)

**Step 2. Choose Recurring Appointments**

1. ![Task Menu](image2)

(1) Select Appointments from the Task Menu and (2) click Recurring Appointments.

**Step 3. Click Create New**

- ![Recurring Appointments](image3)

Click **Create new**.
Step 4.
Complete Recurring Appointment Details

(1) Choose Class Schedule from the Appointment Type drop down, and (2) select the type of class from the Class Name drop down. (3) Enter the Start Date & End by date of the time period the class will be recurring and (4) enter the Start Time & End Time the class will occur.

(5) Choose either the Weekly or Monthly radio option and (6) enter the # of times it will recur each week/month and check off the day(s) of the week it will occur.

Step 5.
Click Save & Close

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Adding Class Participants

Updated  8-Feb-16
Adding class participants includes these 7 steps:

Step 1: Select the Appointment Book tab.

Step 2: Click on the class and choose Update Appointment.

Step 3: Click Participants.

Step 4: Click the Member radio button and then click Find Member.

Step 5: Enter the Member Last or First Name, click Search, and then click Select.

Step 6: Click Ok.

Step 7: Click Save & Close.
Recording Class Attendance Manually

Updated  8-Feb-16

How to record class attendance manually

Recording Class Attendance manually includes these 5 steps:

Step 1: Select the Appointment Book tab.

Step 2: Click on the class and choose Update Appointment.

Step 3: Click Participants.

Step 4: Click Showed Up for all attendees that did not sign in using their key tag and click OK.

Step 5: Click Save & Close.
Step 1.
Go to Appointment Book

Step 2.
Click Update Appointment

Step 3.
Click Participants

Step 4.
Click Showed Up

Click 5.
Click Save & Close

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Curves Complete Appointments
Scheduling a Complete Coaching Appointment

Setting a Complete Coaching appointment includes these 6 steps:

Step 1: Select the Appointment Book tab.
Step 2: From the Appointments Task Menu select Complete Coaching.
Step 3: Click Find Member.
Step 4: Search for the member by last or first name, click SEARCH, and then Select.
Step 5: Complete appointment details.
Step 6: Click Save & Close.

(1) Select Appointments from the Task Menu and (2) click Complete Coaching.
Step 4.
Enter Member Name

(1) Enter the member’s Last Name or First Name, (2) click SEARCH, and then (3) click Select.

Step 5.
Complete Appointment Details

(Optional)

Once a Note/Comment is saved within a given appointment, a little “notebook” icon will show up on the Appointment as a reminder!

Step 6.
Click Save & Close

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Scheduling a Recurring Complete Coaching Appointment

Updated 8-Feb-16
Scheduling a Recurring Complete Coaching appointment includes these 7 steps:

Step 1: Select the **Appointment Book** tab.

Step 2: From the **Appointments** Task Menu select **Recurring Appointments**.

Step 3: Click **Create New**.

Step 4: Select Complete Coaching from the Appointment Type drop down menu and then click **Find Member**.

Step 5: Enter the Member Last or First Name, click **Search**, and then click **Select**.

Step 6: Enter the Start Date, End by date, the Start Time and then the End Time.

Step 7: Click **Save & Close**.

### Step 1. Go to Appointment Book

![Click](image)

### Step 2. Choose Recurring Appointments

1. Select Appointments from the Task Menu
2. Click **Recurring Appointments**

### Step 3. Click Create New

![Click](image)

(1) Select Appointments from the Task Menu and (2) click Recurring Appointments.
Step 4. Select Complete Coaching

(1) Choose Complete Coaching from the Appointment Type drop down and (2) click Find Member.

Step 5. Select Member

(1) Enter the member’s Last Name or First Name, (2) click SEARCH, and then (3) click Select.

Step 6. Enter Complete Coaching Recurring Details

(1) Enter the Start Date & End by date and (2) enter the Start Time & End Time of the coaching sessions.

(3) Choose the Weekly radio option and (4) enter 1 as the # of times it will recur each week and check off the day of the week it will occur.
## Administration Task Menu

### Creating a New Announcement (Internal)

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How to create a New Announcement</strong></td>
<td>Creating a New Announcement includes these 4 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the <strong>Appointment Book</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the <strong>Administration</strong> Task Menu select <strong>New Announcement</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Enter announcement and choose the time period this announcement will display.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Click <strong>Save &amp; Close</strong>.</td>
</tr>
</tbody>
</table>

### Step 1. Go to Appointment Book

![Click](Appointment Book Members Products & Payments)
Step 2. Choose New Announcement
(1) Select Administration from the Task Menu and (2) click New Announcement.

Step 3. Enter Announcement
(1) Enter the announcement, (2) select the display Begin Date, and then (3) enter the End Date.

Step 4. Click Save & Close
Click Save & Close

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## Editing an Existing Announcement (Internal)

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How to edit an existing announcement</strong></td>
<td>Editing an existing announcement includes these 5 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the <strong>Appointment Book</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the <strong>Administration</strong> Task Menu select <strong>Manage Announcements</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Click <strong>Edit</strong> next to the announcement that needs to be changed.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Edit the details of the announcement, including the message and/or display dates.</td>
</tr>
<tr>
<td></td>
<td>Step 5: Click <strong>Save &amp; Close</strong>.</td>
</tr>
</tbody>
</table>

### Step 1.
**Go to Appointment Book**

- Click

### Step 2.
**Choose Manage Announcements**

1. Select Administration from the Task Menu
2. Click **Manage Announcements**

(1) Select Administration from the Task Menu and (2) click **Manage Announcements**.
Deleting an Existing Announcement (Internal)

Updated | 8-Feb-16
--- | ---
**How to delete an existing announcement** | Deleting an existing announcement includes these 3 steps:

Step 1: Select the Appointment Book tab.

Step 2: From the Administration Task Menu select Manage Announcements.

Step 3: Click Delete next to the announcement to be removed.

Step 1. Go to Appointment Book
### Contact MIAs Task Menu

#### Contacting MIAs

| Updated | 8-Feb-16 |

**Step 2. Choose Manage Announcements**

1. Select Administration from the Task Menu and (2) click Manage Announcements.

**Step 3. Click Delete**

Click to delete an announcement.
How to record the contact of a MIA

Contacting MIAs includes these 5 steps:

Step 1: Select the Appointment Book tab.

Step 2: From the Contact MIAs Task Menu select the MIA list from Absent 1 Week, Absent 2 Weeks, Absent 3 Weeks or Non-Attending 4 Weeks +.

Step 3: Click View Details.

Step 4: Click Add Details.

Step 5: Complete contact details.

Step 1. Go to Appointment Book

Step 2. Choose Contact MIAs

Step 3. Click View Details

(1) Select Contact MIAs from the Task Menu and (2) click Absent 1 Week, Absent 2 Weeks, Absent 3 Weeks, or Non-Attending 4 Weeks +.
### Step 4.
Click Add Details

![Add Details]

### Step 5.
Complete Contact Details

![Create Member Comment/Note]

(1) Enter the date of contact, (2) select the Staff Name from the drop down, and then (3) select the Contact Type from the drop down. (4) Enter any applicable Comments and (5) click Save.

---

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**Contact Leads Task Menu**

**Adding a BR/Lead**

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to add collected BR/Lead</td>
<td>Adding a BR/Lead includes these 4 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the Appointment Book tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the Contact Leads Task Menu select Add a BR/Lead.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Complete the BR &amp; Lead Management fields.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Click Save.</td>
</tr>
<tr>
<td>Step 1. Go to Appointment Book</td>
<td></td>
</tr>
<tr>
<td>------------------------------</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 2. Choose Add a BR/Lead</th>
</tr>
</thead>
</table>

(1) Select Contact Leads from the Task Menu and (2) click Add a BR/Lead.

<table>
<thead>
<tr>
<th>Step 3. Enter BR/Lead Information</th>
</tr>
</thead>
</table>

(Optional) Click Find Member to connect this Buddy Referral to the existing member that referred them.

<table>
<thead>
<tr>
<th>Step 4. Click Save</th>
</tr>
</thead>
</table>

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# Adding/Editing Lead Details

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
</table>

**How to add or edit BR/Lead details**

Adding/Editing BR or Lead details includes these 7 steps:

1. Select the **Appointment Book** tab.
2. From the **Contact Leads** Task Menu select **Search Leads**.
3. Search leads by **Active** or **Inactive** or check off **Search Leads by Name** to look up a specific BR/Lead by name or **Search Leads by Date Range**.
4. Click **View Details**.
5. Click **Add/Edit Details**.
6. Add and/or edit the applicable fields.
7. Click **Save**.

**Step 1. Go to Appointment Book**

![Appointment Book](image1)

**Step 2. Choose Search Leads**

![Task Menu](image2)

(1) Select **Contact Leads** from the Task Menu and (2) click **Search Leads**.

---

220
Step 3. Filter the List of BRs/Leads to be Displayed

(1) Click to search by Active Leads and/or Inactive Leads, (2) search leads by entering a specific First and/or Last Name or Search Leads by Date Range, and then (3) click Search.

Step 4. Click View Details

Step 5. Click Add/Edit Details

Step 6. Add/Edit Details

(1) Edit details and (2) Add Note, if applicable.
Making a Lead Inactive

Updated 8-Feb-16

Inactivating BR or Leads includes these 6 steps:

Step 1: Select the Appointment Book tab.

Step 2: From the Contact Leads Task Menu select Search Leads.

NOTE: Active Leads will automatically populate.

Step 3: Search leads by Active or Inactive or check off Search Leads by Name to look up a specific BR/Lead by name or Search Leads by Date Range.

Step 4: Click View Details.

Step 5: Click Add/Edit Details.

Step 6: Choose the Staff and Contact Type from the drop down menus, enter the reason, and then click Save.
Step 2. Choose Search Leads

(1) Select Contact Leads from the Task Menu and (2) click Search Leads.

Active Leads will automatically be checked off.

Step 3. Filter the List of BRs/Leads to be Displayed

(1) Click to search by Active Leads or Inactive Leads, (2) click Search Leads by Name to search for a specific BR/Lead by name or Search Leads by Date Range.

Step 4. Click View Details

Click
Printing Lead Labels

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How to Print Lead Labels</strong></td>
<td>Printing out lead labels includes these 5 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the <strong>Appointment Book</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the <strong>Contact Leads</strong> Task Menu select <strong>Search Leads</strong> or to print out ONLY <strong>NEW</strong> lead labels click <strong>New Leads</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Click the <strong>Print Labels</strong> button.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Click <strong>Open</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 5: Click the Print icon.</td>
</tr>
<tr>
<td>Step 2. Choose Search Leads or New Leads</td>
<td></td>
</tr>
<tr>
<td>------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>1. Select Contact Leads from the Task Menu and 2. click Search Leads.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 3. Click Print Labels</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Search Leads Screen" /></td>
</tr>
<tr>
<td><img src="image" alt="Click" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 4. Click Open</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Open or Save Dialog" /></td>
</tr>
<tr>
<td><img src="image" alt="Click" /></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Step 5. Click the Print icon</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Lead Labels.pdf" /></td>
</tr>
<tr>
<td><img src="image" alt="Click" /></td>
</tr>
</tbody>
</table>

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Unfinished Business Task Menu

Finishing Incomplete Appointments

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>How to finish an incomplete appointment</td>
<td>Finishing an Incomplete Appointment includes these 5 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the Appointment Book tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the Unfinished Business Task Menu select Incomplete Appointments.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Click Edit to finish the appointment.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Complete appointment details by clicking the correct checkbox: Cancel, No Show, or Showed Up and then either No Sale or Sale.</td>
</tr>
<tr>
<td></td>
<td>Step 5: Click Save &amp; Close.</td>
</tr>
</tbody>
</table>

Step 1. Go to Appointment Book

Step 2. Choose Incomplete Appointments

(1) Select Unfinished Business from the Task Menu and (2) click Incomplete Appointments.

Step 3. Click Edit

Today's Unfinished Appointment Book Information:

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Appointment Date</th>
<th>Staff Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hut</td>
<td>Cindy</td>
<td>7:00 AM</td>
<td>Wilsted, Abigail</td>
</tr>
</tbody>
</table>

Click
**Completing Incomplete Appointments for Members who are already entered into Curves OS™**

<table>
<thead>
<tr>
<th>Updated</th>
<th>8-Feb-16</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>How to complete an incomplete appointment for Members who are already entered into OS</strong></td>
<td>Completing an Incomplete Appointment for a Member already entered in OS includes these 9 steps:</td>
</tr>
<tr>
<td></td>
<td>Step 1: Select the <strong>Appointment Book</strong> tab.</td>
</tr>
<tr>
<td></td>
<td>Step 2: From the <strong>Unfinished Business</strong> Task Menu select <strong>Incomplete Appointments</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 3: Click <strong>Edit</strong> to finish the appointment.</td>
</tr>
<tr>
<td></td>
<td>Step 4: Click <strong>Showed Up</strong> and click <strong>Sale</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 5: Click <strong>Save &amp; Close</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 6: Although this member has already been entered into OS, click <strong>OK</strong> to the popup “Would you like to add this guest as a member at this time?”</td>
</tr>
<tr>
<td></td>
<td>Step 7: Click <strong>View</strong> next to the duplicate member.</td>
</tr>
<tr>
<td></td>
<td>Step 8: Confirm that this is the member in question and click <strong>SAME MEMBER</strong>.</td>
</tr>
<tr>
<td></td>
<td>Step 9: Review member information and click <strong>SAVE</strong>.</td>
</tr>
</tbody>
</table>

| Step 1. Go to Appointment Book | Click |
Step 2. Choose Incomplete Appointments

1. Select Unfinished Business from the Task Menu and 2. click Incomplete Appointments.

Step 3. Click Edit

Step 4. Click Sale

1. Click Showed Up and 2. click Sale.

Step 5. Click Save & Close

Step 6. Click OK even though she is already entered
Step 7. Click View

If there were two FA [Consultation] Appointments set for the same member, be sure to check off the Cancel box on the appointment that was changed to clear it from Unfinished Business.

Remember, to avoid this in the future if a member “reschedules” her initial FA Appointment, click on the appointment and simply change the date and time. Do not create a new, separate appointment for a guest who was a previous no sale or has another incomplete appointment.

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Step 8. Click SAME MEMBER

Recording Payment on a Payment Due

Updated 8-Feb-16
Recording a Payment on a Payment Due includes these 8 steps:

Step 1: Select the Appointment Book tab.
Step 2: From the Unfinished Business Task Menu select Payments Due.
Step 3: Click Make Payment.
Step 4: Click NEXT.
Step 5: Click Add Payment.
Step 6: Choose the Payment Method from the drop down menu and click Add.
Step 7: Click SAVE.
Step 8: Click Print or Close.

The following screenshots are for instructional purposes only. Details will vary by country/location (including monetary values/amounts, symbols, payment methods, date formats, tabs, etc...).

Step 1. Go to Appointment Book

Step 2. Choose Payments Due

(1) Select Unfinished Business from the Task Menu and (2) click Payments Due.
Step 3. Click Make Payment

Step 4. Click NEXT

Step 5. Click Add Payment

Step 6. Add Payment Details

Step 7. Click SAVE

Step 8. Click Close

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## Using System Warnings

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</tr>
</thead>
</table>

### How to use System Warnings

Using System Warnings includes the following 3 steps:

1. **Step 1:** Select the **Appointment Book** tab.
2. **Step 2:** From the **Unfinished Business** Task Menu select **Warning Messages**.
3. **Step 3:** Review the Franchise System Warning(s) and click on the blue number for more details.

This feature is designed to give the user a general overview of the areas in need of attention. Be sure to review all associated members, payments, etc. found within these areas for updating when/where needed.

### Step 1. Go to Appointment Book

![Appointment Book](image)

Click

### Step 2. Choose Warning Messages

![Task Menu](image)

(1) Select Unfinished Business from the Task Menu and (2) click Warning Messages.

### Step 3. Click on the blue number

![Warning Messages](image)

Click

These Warning Messages are updated once daily at 4:30am (central). The blue number will vary. This number provides a general idea and not an exact figure.

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