zingfit/guides

Front Desk

This guide is intended to assist any employees responsible for handling customer enrollment in **zingfit's Booker** as well as the **Point of Sale Register**. All permissions and access to the system are controlled by the **User's Role.**

Booker Overview

Booking a Class

The Booker's main function is to allow the studio staff to enroll customers in a class.

How to Book a customer in the Booker

- Search for the customer in the Booker's search field.
- Once the customer has been selected, use the schedule on the left-hand side of the booker to select the class the customer would like to enroll in.
- Once the class has been selected:
    - **If in a Spot Scheduled room**: select the spot the customer chooses.
    - **If in a Non-Spot Scheduled room:** Select 'Enroll Customer.'
- If the customer does not have a Series for the class, the booker will provide a message the booking was unsuccessful and indicate the Series Type needed to book into that class.
- If the customer does have the appropriate Series type, the customer will be enrolled in the class. They will receive a booking confirmation email via our system emails.

How to switch Spots (Spot Scheduled Rooms only)

Once a customer is enrolled in the class, it is easy to change their spot using the Booker.

To do this:

1. Select the **class** where the customer is enrolled.
2. Select the **name** of the **customer.**
3. Select **'Switch Spots.'**
4. Select the spot the customer would like to switch to.

The spot will automatically update the customer's attendance to reflect their new spot.

How to Cancel a customer in the class

1. Select the **class** where the **customer** is enrolled.
2. Select the name of the **customer.**
3. Select **'Cancel.'**
4. The system will prompt you to either:
    a. **Yes, Remove** - this will remove the **customer.**
    b. **Yes, Remove & Notify** - this will remove the customer and trigger the **Attendance Canceled System Email.**

c. **Close** - this will void the cancelation.

How to No-Show a customer

1. Select the class where the customer is enrolled from the left-hand side of the Booker.
2. Select the name of the customer.
3. Select 'No Show.'
4. A pop-up will prompt you to confirm you want to no-show this customer.
5. Selecting 'Yes' will remove the customer from the class and add their name to the No-Show Report.

How to Sign a customer into class

In the Booker's room map, select the arrow icon either next to the customer's name (for non-spot schedule rooms) or on the customer's spot (for spot schedule rooms).

How to put a Spot On Hold (Spot Schedule Rooms)

1. Select the **class** where the customer is enrolled from the left-hand side of the Booker.
2. Use the **'-'** sign on the physical spot to put that spot **on hold**. This will prevent customers from booking that spot.

Customer Search Field

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Enter a **customer's name** here and select them from the list if they are not auto selected. Customers can be found by searching either their name or email address.

Class Dropdown Menu

When a class is selected, along the top right-hand side of the Booker, next to the room drop-down selector, you'll find the Class Dropdown Menu. This can be used to:

Email the class and/or the waitlist - the studio can customize a subject and message to send out to the customers in the class or on the waitlist.

Cancel the class - this will trigger the Attendance Cancelled system email to automatically send to all customers in the class.

Print sign-in sheet - this will print a sign in sheet for customers to physically sign into the class.

Print room - this will print the Spot Scheduled Room with the customer attendance data.

Customer info - this provides a report of all customers enrolled in the class, including:

1. **Customer Name**
2. **Email Address**
3. **Notes**
4. **Series/Contract used to book into the class**

Review the Attendance Log - this is a log for each attendance record for that class including enrollments, cancelations, no-shows and change in series for the booking.

Review Products for this class - if Product Upsells are enabled, this will provide you with a list of purchased items via Product Upsells for this class.

+ New Customer

This option is used for staff to sign up customers in the studio. The **New Customer** form will reflect the specific preferences set up in your **Customer Configuration Fields**.

Once all fields have been filled out for the new customer, select **'Save Changes'** to add the customer to the studio customer base. You can also select **'Save and Register'** and the system will bring the **POS** up to run a transaction for the new customer.

Quick Sale/Refund

Quick Sale

Whenever the studio has a **walk-in transaction** for someone who is not a studio customer, the studio staff will use the **Quick Sale/Refund** dropdown menu in the booker to run the transaction.

Selecting **'Quick Sale'** will pop-up the **Walk-In Point Of Sale**. This POS will only include Products, **not Series or Contracts.** If you want to sell a **Series** or **Contract**, a customer account is required.

1. Selecting **'Take Payment'** will take you to the check-out screen. This screen will not include a card on file as there is no customer account. Once payment has been provided, we strongly encourage you to print the receipt for the guest. In the case of a return, the only way to identify the transaction is through the ID provided on the receipt.

2. If you have a walk-in guest that needs a refund, select the **arrow** next to the **Quick Sale** drop-down menu to expose the **Quick Refund** option.

Quick Refund

The **Quick Refund** screen will ask for an **Order ID, Email Address, or Last Name** to look up the transaction in question. Because there is not a customer account associated with the transaction, these are the only options for a look-up.

A **Quick Refund** can also be used for an **existing customer** as well.

Launching the Self Sign-in Kiosk

Once the **Self Sign-in Kiosk** has been set up, to launch this kiosk the studio will open the **zingfit Manager** on their in-studio iPad or computer and select **'Self Sign-in Kiosk.'** This will automatically log out all **zingfit** users in the browser.

Room Dropdown Menu

When the **Room Dropdown Menu** is changed, the Booker will **automatically refresh** the Booker to update the schedule based on the room selected. This option is used to toggle between rooms.

Time Clock/Time Log

For staff to **clock in** and **out**:

1. Select the **gear icon** beside the **username** in the **Booker**. Then, select **Time Clock.**
2. **Select Clock In/Clock Out** to manage your time. The user must be logged in to clock in/clock out but does not need to remain logged in for the duration of their shift.

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Top Nav

The **Top Navigation**, o**r Navigational Menu** will stay consistent throughout the **zingfit** system. The **Top Navigation** allows for the **zingfit** user to access the different sections of the **Manager**. Access is dependent on **Role** settings.

Point of Sale (POS)/Register

Adding items to the Register

1. Search for the customer in the **Booker.**
2. Select **Register** from the **Customer's Profile Card.**
3. You will have the option to add **Retail** or **Series** to the Register by selecting the **Series Type** or **Category** for the product you wish to sell. Whenever creating **Products,** if the **Quick Pick** option is selected, the item will be listed immediately under the **Quick Picks** option on the right-hand (**Merchandise**) side of the **Register.**
4. Use the **"-"** icon on the left-hand side of the **Register** to remove the item from the Register.

5. **Percentage** or **Flat Rate** discounts can be applied at this point (roles permitting).
6. Once all items have been added to the Register for the transaction, select **Take Payment.**

Taking Payment

1. On the **Take Payment** screen, you can redeem a **Gift Card, Promotion Code** (keep in mind that you will only see the promo filed when you have an active promotion in the system), place the order with a card already on file, and even input **Split Cash** values.
2. Anything that needs to be handled on the **left-hand side** of this screen should be input **before** placing the order to ensure everything is applied/redeemed, etc.
3. If you are using a **card swiper,** you can swipe the card in this screen to capture the information. If you do not have the customer's card on file or a swiper, you will need to manually input the card data. **Billing information** is pulled from the customer account.
4. You can also use **Series Activation Date** to **pre-date** or **post-date** the activation of the series in the transaction. If this is not configured, the Series will activate according to the **Series'** settings.

5. The **Email Receipt** option will likely be automatically selected but you can toggle this depending on the customer's request.
6. Select **Place Order.**
7. After receiving the **Order Confirmation** screen, you can select **Print Receipt** or **Return**.