

# **Management Maker**

## **Getting Started Administrator Guide**

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## Introduction

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### **Benefits**

Get immediate access to your facility's records and activities with Management Maker, including:

- Schedules for classes and staff.
- Client appointments and activities.
- Client purchases, account balances and invoices.
- Overall revenue stream.

Plus, increase client recruitment and retention via customized, automatic mailings.

### **Administrator Role**

As the administrator, you will be responsible for setting up Management Maker for your facility's use. To do this, you will enter: (a) application defaults; (b) staff member information and schedules; (c) client information; (d) class schedules; and (e) product information for sales tracking purposes.

In addition to setting up the application for your facility and controlling the system defaults, you will have access to areas of Management Maker, which your staff members will not, including Batch Invoicing and Revenue Summaries.

### **Getting Started**

**Note:** To view the Management Maker software license, please access <http://www.bioexsystems.com/license.htm>.

#### **1. Install Application**

1. Insert CD into drive.
2. Wait for Auto Load or: Start: Run Type D:\Setup.exe (substitute drive if needed).
3. Press Enter.
4. Follow on-screen instructions.

#### **2. Register**

**Note:** The individual who registers their facility in Management Maker will, by default, be an Administrator and will be responsible for setting up their facility in Management Maker. See the Application Setup materials below for more information.

1. Start the application by double-clicking the Management Maker icon.
2. Click the green **Register** button on the bottom left of the login screen.

3. Enter your registration code, located on the inside flap of the cardboard case the Management Maker CD came in.
4. Complete the fields, entering your name, a user Id, password and password reminder. (The password reminder will display if you forget your password and click the "Password Reminder" button on the login screen.) (Users should record their user Ids and passwords and keep them in a safe place, as BioEx cannot retrieve this information.)

### 3. Log On

1. Select your username from the User Id field. (As you add staff members to the system, their names will appear in this dropdown as well.)
2. Enter your password.
3. Click the **Login** button.

## Application Setup

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Note: There are no "Save" buttons throughout the application; the data you enter will save automatically.

### A. Application Defaults

#### 1. Provide Licensing Information

This step is required before you can add staff members to Management Maker.

**Note:** if your facility already owns other BioEx Systems' products (Fitness Maker, Fitness Maker Pro, Nutrition Maker, Nutrition Maker Focus or Nutrition Maker Plus) and has purchased multiple trainer licenses, those licenses will apply to Management Maker; you will not need to purchase additional licenses specifically for Management Maker.

1. Click **Admin** from the row of horizontal tabs at the top of the screen.
2. Click the **Network & Licensing** tab from the row of vertical tabs at the left of the screen.
3. Click the **Add Staff Licenses** button, enter the license, then click the **OK** button. Contact support@BioExSystems.com if you have questions regarding your staff license.

#### 2. Enter Your Facility's Information

Complete this section so your facility's information appears on invoices and reports.

1. Click **Admin** in the row of horizontal tabs at the top of the screen.
2. Click **Facility Info** from the row of vertical tabs on the left side of the screen.
3. Complete the fields.
4. To have your facility's logo appear on reports and invoices, click the **Logos** button. (Note: "JPEG" and "BMP" formatted pictures are required; horizontally formatted logos are recommended.) When you click the **Add** button from the "Maintain Logos" popup window, an "Open" popup window will appear, enabling you to navigate your computer's directory to select the logo file.

### 3. Set Billing/Invoicing Defaults

Designate: how many days overdue an invoice must be to be considered overdue; default sales tax for purchases; invoice numbers; and printing options.

1. Click **Admin** in the row of horizontal tabs at the top of the screen.
2. Click **Billing & Invoicing Defaults** from the row of vertical tabs at the left of the screen.
3. Complete the fields and select printing options.
  - a. **Default Sales Tax** field: the default sales tax you enter can be overridden when you create products and classes in Management Maker and set their prices.
  - b. **Invoice Start Number** field: designate what invoice number should be assigned to the first invoice you generate through Management Maker.

### B. Staff Member Information and Work Schedules

Before adding each staff member, you may wish to ask him or her for a preferred User Id, Password and Reminder Phrase.

1. Click **Admin** from the row of horizontal tabs at the top of the screen.
2. Click **Staff** from the row of vertical tabs at the left of the screen.
3. Click the **Add Staff** button.
4. Complete the fields.
  - a. In the **Staff Rights** field, select whether you want this staff member to have user or administrator rights. Administrators can modify staff, financial and other administrative and/or sensitive information.
5. When you click the **OK** button, the full Staff screen will appear. Complete the remaining fields (optional).
  - a. To enter the staff member's work hours, click the **Add Hours** button located in the **Work Hours** section in the middle right of the screen.
  - b. To enter different times for different days of the week, click the **Add Hours** button again.

### C. Client Information

Entering clients into Management Maker will enable you to add clients to classes, create client appointments, track client schedules and purchases and manage their accounts.

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| <p><b>Note:</b> Staff members can enter client information as well. You may wish to delegate this task.</p> |
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For each client at your facility, complete the following:

1. Click **Clients** from the row of horizontal tabs at the top of the screen.
2. Click the **Add Client** button at the top left of the screen.
3. Complete the fields.
4. When you click the **OK** button, the full Client Info screen will appear. Complete the remaining fields (optional).
5. If the client has a monthly membership fee, click the **Billing & Purchasing** vertical tab and click the **Add** button in the "Membership Information" area at the top of the screen.

## ***D. Class Schedules***

Setting up your facility's class schedule in Management Maker enables you to easily view your schedule, manage scheduling changes, track which staff are responsible for which classes, and track client attendance.

### **1. Enter Classes**

Before you can set the class schedule you must enter classes into Management Maker.

1. Click **Admin** from the row of horizontal tabs at the top of the screen.
2. Click **Products/Classes** from the row of vertical tabs at the left of the screen.
3. Click the **Add** button at the bottom of the screen.
4. Complete the fields.
5. In the **Product Type** field select whether you are adding a class or an individual session. A class is for multiple clients and a session is for a single client. Both can be scheduled for one or more occurrences. (You will add items later).
6. If you are entering a class, you can indicate the class schedule here or from the "Schedule" horizontal tab, following the directions below. (If you are entering an individual session, you will set the date and time from the "Schedule" horizontal tab as described below.)

### **2. Set Schedule**

1. Click **Schedule** from the row of horizontal tabs at the top of the screen.
2. At the top left of the screen, in the "Calendar View" area, designate whether you would like to view the calendar in a daily, weekly or monthly format.
3. Click on the arrows or dates located in the small monthly calendars on the left side of the screen to change the date(s) you are viewing.
4. Add classes and appointments by double clicking on a date/time in the main area of the screen.
5. Complete the fields in the "Add/Edit Appointment" popup window.
6. If a class occurs on a regular basis, click the **Add Recurrence** button.
7. If more than one staff member is responsible for the class, click the **Multiple Staff** button.
8. If you know which client(s) will be attending the class, you can enter their name(s) in the **Client** field or by clicking the **Add Clients** button that appears when you selected a class that accommodates multiple clients from the **Session/Class** field.

## ***E. Products for Sale***

If your facility sells items such as yoga mats and athletic apparel, you can enter these items into Management Maker and later track sales (from the "Batch Invoicing" and/or "Revenue Summary" tabs), or conduct client transactions (from the "Cash Register" horizontal tab.)

1. Click **Admin** from the row of horizontal tabs at the top of the screen.
2. Click **Products/Classes** from the row of vertical tabs at the left of the screen.
3. Click the **Add** button at the bottom of the screen.

4. In the **Product Type** field select the "Item" radio button option, then complete the fields.

## **Next Steps**

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Once you've completed the steps above, you can perform the following activities (refer to the Management Maker Administrator Help Manual for details):

1. Generate automated client mailings. (Set mailing defaults in the "Admin>Client Communications" tabs, then generate the mailing itself from the "Reports & Client Retention" horizontal tab.)
2. Generate reports to view which clients are active or inactive. (From the "Reports & Client Retention" horizontal tab.)
3. Print schedules of client appointments, classes and staff work schedules. (From the "Reports & Client Retention" horizontal tab.)
4. Manage invoices. (From the "Batch Invoicing" horizontal tab.)
5. Process client purchases and transactions. (From the "Cash Register" horizontal tab.)
6. View revenue summaries for your facility and process client payments. (From the "Revenue Summary" horizontal tab.)