Management Maker

Getting Started
Staff Member Guide

Introduction

Staff Member Role

Management Maker gives staff members the ability to view and manage:

- Client information, including client schedules and appointments.

- Scheduling, including setting up classes, creating appointments and individual sessions.

- Processing client purchases via the Cash Register feature and/or generating client invoices.

- Automated Client Mailings

Logging On

1. Obtain your username and password from your facility's Management Maker administrator. (You should record your user Id and password and keep them in a safe place, as BioEx cannot retrieve this information.)
2. Select your username from the User Id field.
3. Enter your password.
4. Click the **Login** button.

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

Scheduling

You, the Management Maker Administrator for your facility and other staff members can also view, add, remove and edit appointments and classes from your schedule. Likewise, you can add, remove and edit appointments for your fellow staff members.

View your schedule

1. Click **Schedule** from the row of horizontal tabs at the top of the screen.
2. Highlight your name from the "Staff" list at the upper left side of the screen. (To view other staff members' schedules, highlight "All" at the top of the list, or an individual staff member's name.)
3. Control your view by selecting "Daily," "Weekly" or "Monthly" from the "Calendar View" area directly above the "Staff" list.
4. 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.

Schedule classes & appointments

1. Follow the instructions to view your schedule (above).

2. Add classes and appointments by double clicking on a date/time in the main area of the screen.
3. Complete the fields in the "Add/Edit Appointment" popup window.
4. If a class occurs on a regular basis, click the **Add Recurrence** button.
5. If more than one staff member is responsible for the class, click the **Multiple Staff** button.
6. 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.

Client Management

Your facility's Management Maker Administrator may have already entered your clients, but you can add additional ones, made modifications or remove any clients as needed.

The **Clients** horizontal tab enables you to enter your clients' information into Management Maker and track their billing and purchasing, payment history and class/session schedules.

Note: when you access the **Client** tab, you will always need to either first add a new client or pull up an existing client's record before you can access any of the client-specific areas indicated by the vertical tabs.

Add a Client

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.

Edit a Client

1. Click **Clients** from the row of horizontal tabs at the top of the screen.
2. Click the **Client Search** button at the top right of the screen.
3. Search in "Search for Client" popup window using one of the following approaches:
   a. Enter search criteria into any of the fields then click the **Client Search** button to display clients corresponding to your criteria.
   b. Leave the search fields blank and click the **Client Search** button to display clients. Filter results by selecting a radio button in the **Show** field at the upper right of the window.
   c. Search results will filter out clients belonging to other staff members. To display clients for all staff members, click the checkbox adjacent to **Show Clients for All Trainers**.
   d. Clear search results by clicking the **Clear** button.

4. To edit a client's information, click your mouse over the client's name, then click the **Select Client** button. The client's information will appear for you to edit.

Processing/Managing Client Purchases

When a client makes a purchase you can process it either through the Cash Register Feature or via the Clients>Billing & Purchasing area.

The **Cash Register** enables you to process client purchases and generate an invoice for each purchase. The cash register feature is helpful when you have multiple clients making purchases at a given time; you can quickly enter each purchase via the cash register.

The **Clients>Billing & Purchasing** area is convenient when you want to view a client's recent transactions and outstanding invoices. Use the Clients>Purchase History area to see a history of a client's transactions.

Cash Register Purchases

1. Click **Cash Register** from the row of horizontal tabs at the top of the screen.
2. Indicate which client is making the purchase by clicking the **Client Search** button at the top of the screen.
3. Click the **Add Product** button in the "Products Pending Invoice" section.
4. A will appear.
5. From the "Purchase Product" popup window, select the product to be purchased from the dropdown menu in the product field.
6. Complete the remaining fields and click the **OK** button.
7. Enter the amount the client has paid you in the **Amount Tendered** field.
8. In the **Payment Type** field, indicate if payment was made by cash, check or credit card.
9. Click the **Complete Sale & Print Receipt** button at the bottom of the screen.

Print Schedules

1. Click **Reports & Client Retention** from the row of horizontal tabs at the top of the screen.
2. In the "Scheduling & Sales Reports" section, select which schedule you wish to print: schedule for all staff; unscheduled client appointments; sessions scheduled but unpurchased, clients missing appointments; or class schedule for the facility.
3. Click the **View** or **Print** button.

Generate Automated Client Mailings

1. Click **Reports & Client Retention** from the row of horizontal tabs at the top of the screen.
2. In the **Contact Clients by** field, choose whether to send postcards or Email for this particular mailing. (To send an Email mailing, your facility must use Outlook, Outlook Express or Netscape as its Email server; your administrator must have first set up Email settings for your facility; and your clients' Email addresses must have been entered in their profiles.)

3. Complete the remaining fields in the Postcard or Email section (depending on which you selected).
    a. Postcards: Check the "Print Address" box if you want to print client addresses on the back of each postcard.
    b. Postcards: If you have preprinted postcards and do not wish to print any text on them, deselect the "Print Text" option checkbox.
    c. Select the appropriate **Send** field to designate whether you want the mailing to go to active clients, specific clients or clients who have not recently had a scheduled session. (If you choose to send to specific clients, the system will prompt you to select particular clients.)
    d. Optional: view a list of mailing recipients by clicking the **View Recipients** button at the bottom of the screen.
    e. Click the **Send/Print** button. If you elected to send Emails, Management Maker will automatically generate the Emails. If you elected to send postcards, Management Maker will send the data to your printer.

Additional Functionality

Manage individual client accounts from the **Clients>Billing & Purchasing** area. From here, you can manage and generate client invoices and process sales of products and classes. The **Clients>Payment History** area lets you quickly get an overview of your client's account and financial status with your facility. You may also wish to view reports from the **Reports & Client Retention** area.