ANTARIS

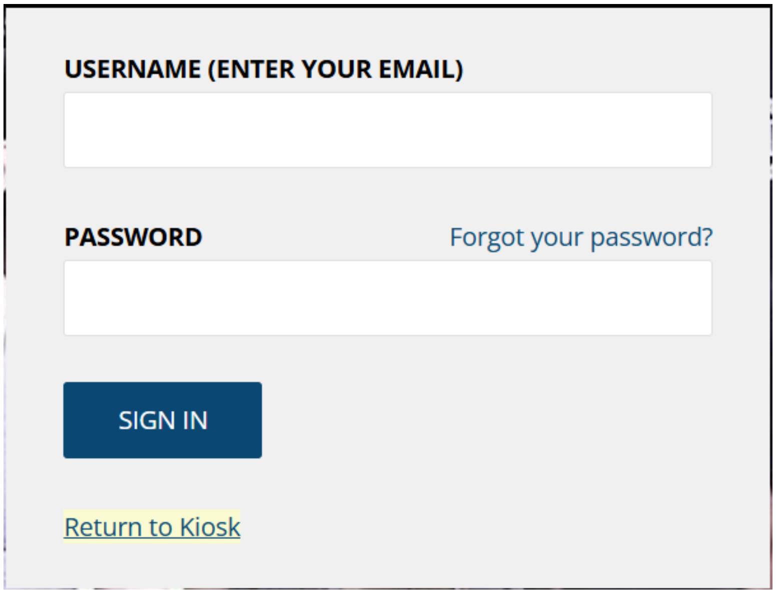
# Front Desk User Manual

Version 4

## Table of Contents

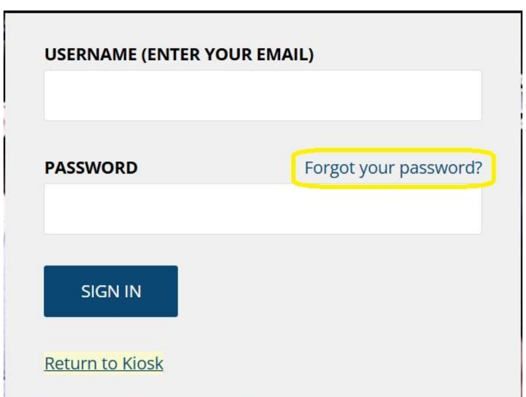
## Logging Into Staff Account

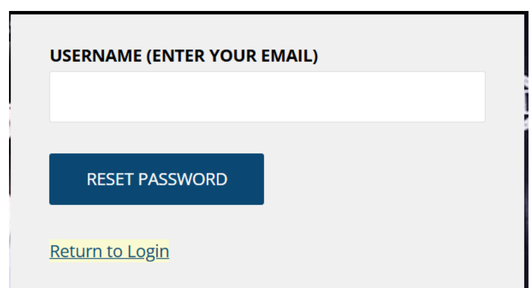
1. On the fitness center's Antaris login page, enter your **USERNAME (ENTER YOUR EMAIL)** and **PASSWORD** >SIGN IN




## Resetting Login Password

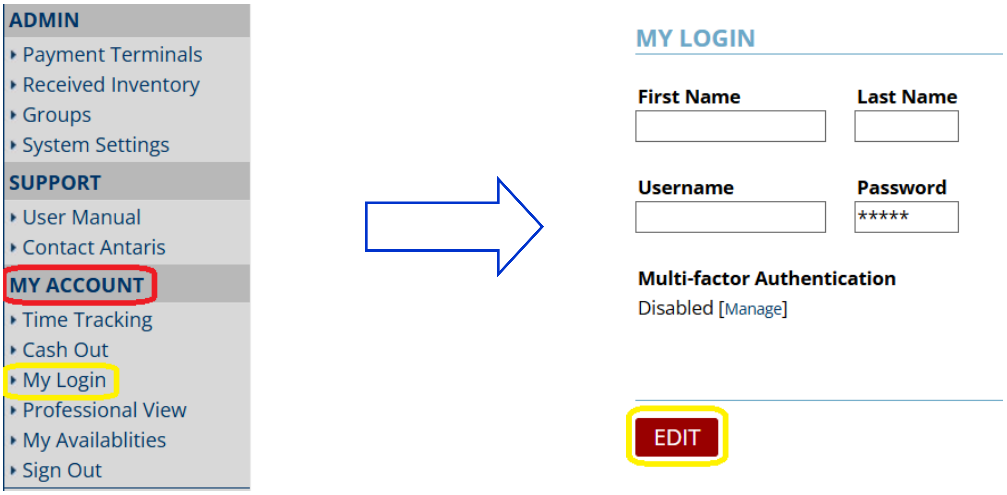
1. On the fitness center's Antaris login page, click the Forgot your password? link > Enter **USERNAME (ENTER YOUR EMAIL)** > RESET PASSWORD
2. Check email folder for updated password *(Remember to check Spam or Junk email folders)*



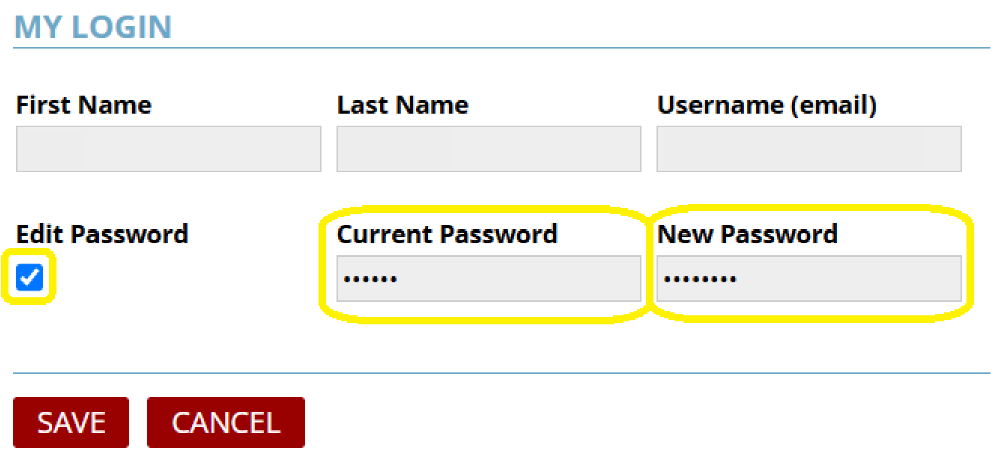



# Updating Login Password

1. Left Navigation Menu *(Left-side Menu):* **MY ACCOUNT** > My Login
2. On the My Login Page > EDIT



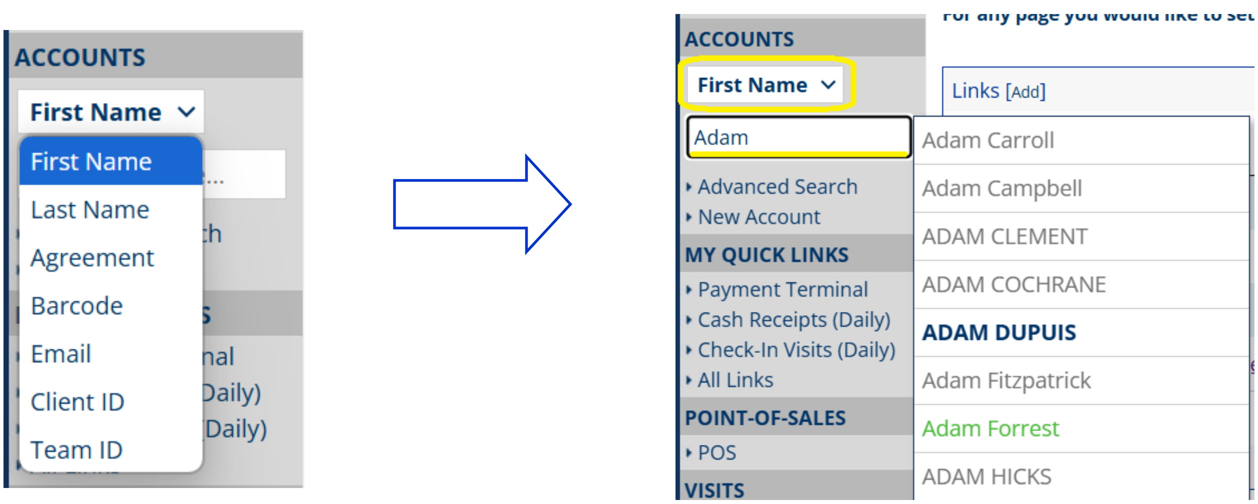

3. Select **Edit Password** box > enter **Current Password** and **New Password** > SAVE



## Finding A Client Account - Option 1 (Quick Search)

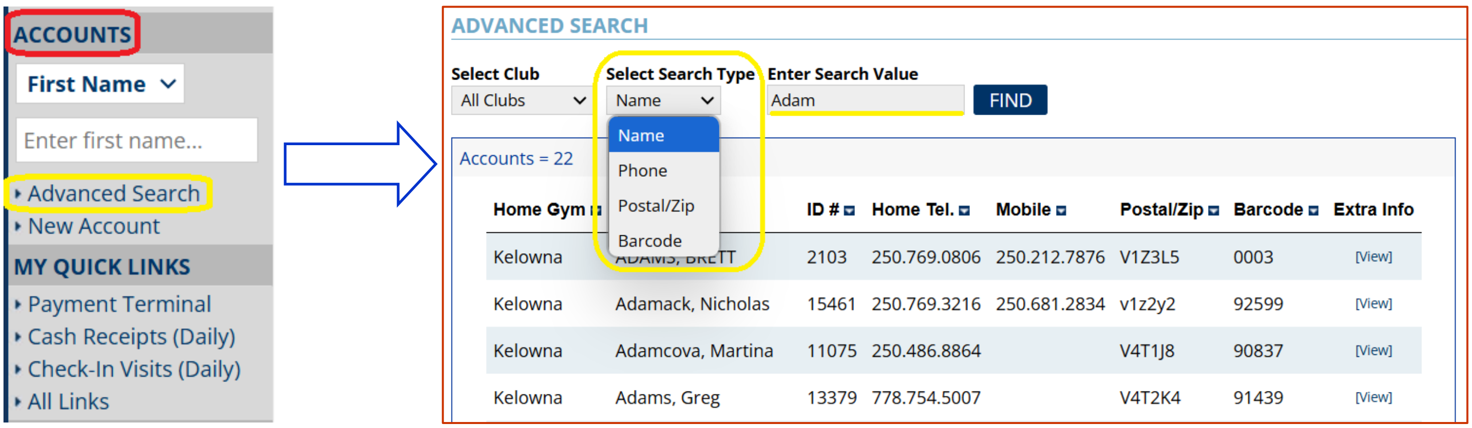
Left-side menu: **ACCOUNTS** > set search type filter (6 options: First Name, Last Name, Agreement, Barcode, Email, Client ID, Team ID) > below drop-down filter, enter characters matching search type filter > Select Client Account

- Blue Accounts indicates a current active club member
- Gray Accounts indicates an expired account
- Green Accounts indicates a lead client

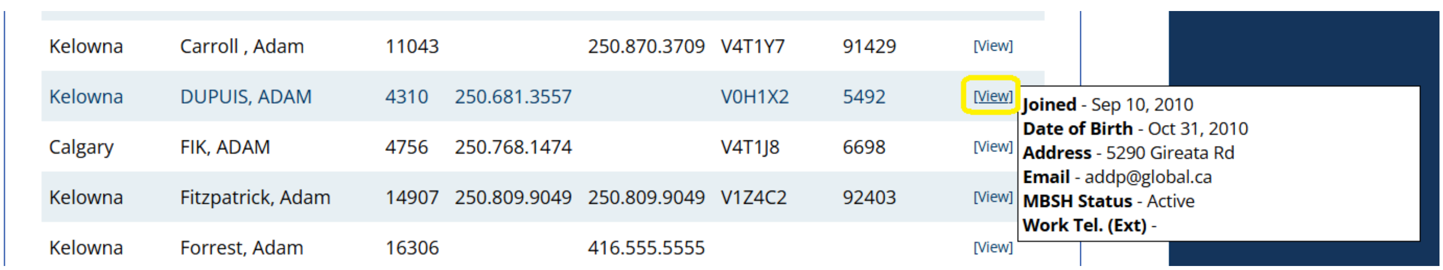


# Finding A Client Account - Option 2 (Advanced Search)

1. Left-side menu: **ACCOUNTS** > Advanced Search
2. On the Advanced Search page, select Search Filter Type set search type filter (4 options: Name, Phone, Postal/Zip, Barcode) > enter Search Value> FIND > Select client account



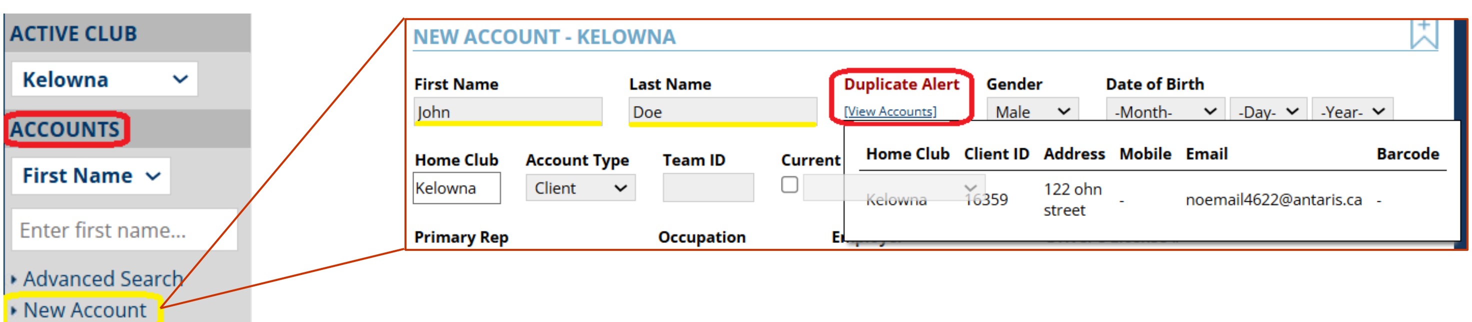

* If there are multiple accounts, hover over [View] for more information




# Adding a New Client Account

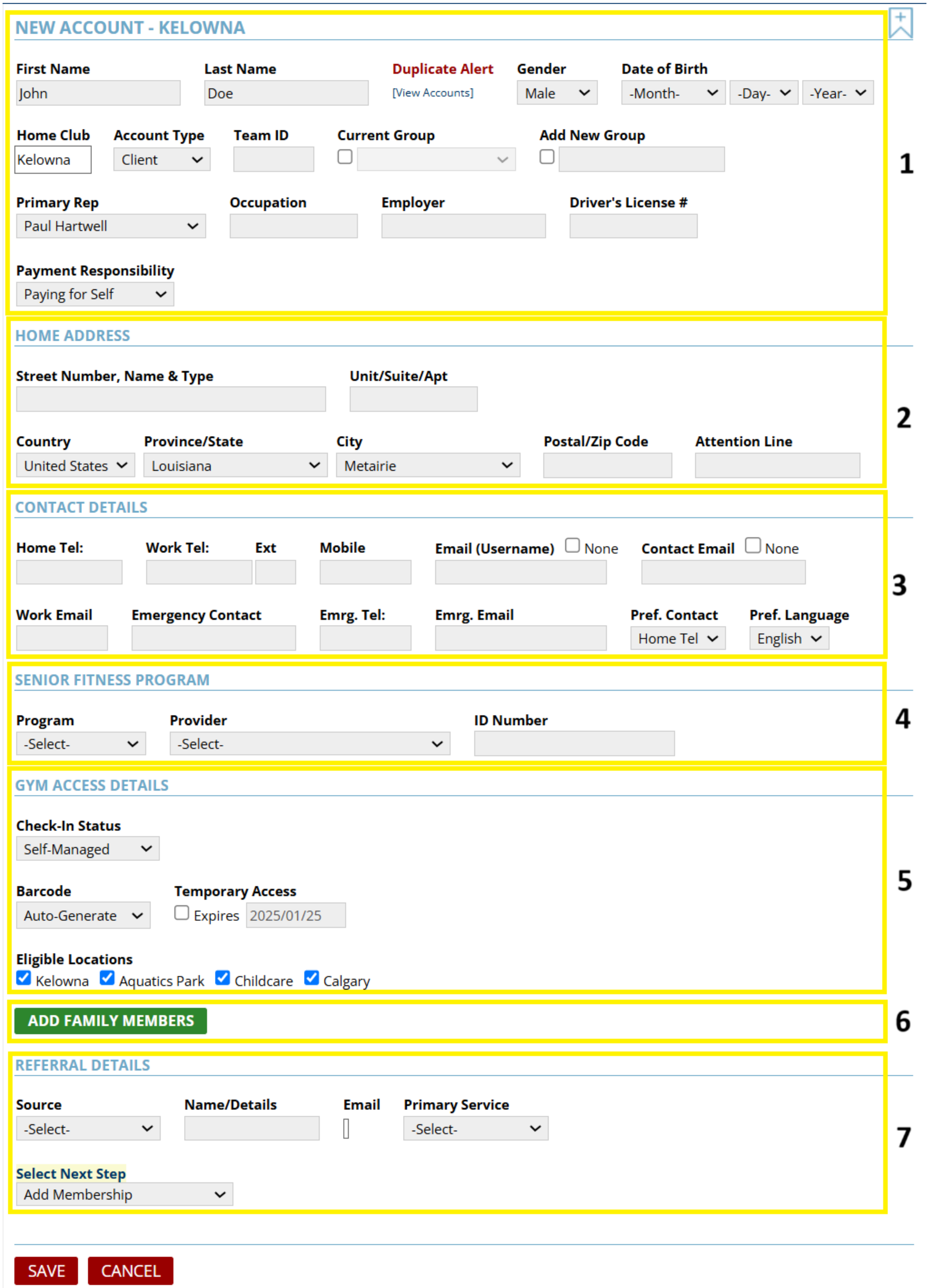
* To avoid duplicates, see steps for Finding a Client Account before adding new account

Left-side menu: **ACCOUNTS** > New Account



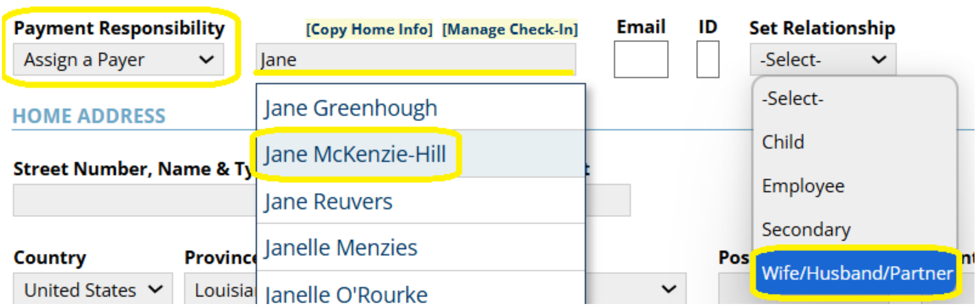

* Antaris will also provide an alert for potential Duplicate Account after inputting the new client's First and Last name. To find out more, hover over [View Accounts]

# Adding a New Client Account (Continued)



**KEY FIELDS (Section 1)**

- First Name, Last Name, Gender, and Date of Birth
- **Home Club**: Verify that you selected the correct home club; if not, toggle Active Club on left menu
- **Account Type**: Set Employee if new client uses Payroll Deduct for recurring charges
- **Team ID**: Enter payroll/team ID if new client uses Payroll Deduct for recurring charges
- **Current Group:** Set group (i.e. corporate account) if new client belongs to a company, school or group
- **Payment Responsibility**: If new client has recurring charges paid for by another client, set to **Assign a Payer** and enter first name of current client account. **Select Relationship field is Optional*




**KEY FIELDS (Section 2)**

- Home Address Information

**KEY FIELDS (Section 3)**

- **Phone Numbers**: Enter 10 digits without any spaces or special characters
- **Email (Username) and Contact Email**: Check None box if new client doesn't have any email
  a. **Email (Username)** must be unique; it cannot be duplicated across different client accounts
  b. **Contact Email:** can be duplicated across different client accounts
  c. Do not enter a fake email, always select None box if no email is provided

**KEY FIELDS (Section 4)**

- **Senior Fitness Program**: If new client belongs to an Insurance Program, select **Program** and **Provider** (set Not Listed if provider not on the list), enter **ID Number** (verify accuracy)

**KEY FIELDS (Section 5)**

- **Check-In Status**: If new client has his/her club/gym membership access covered by another member (e.g. through a Couples or Family membership) set to **Assign a Member** and enter first name of current client account (i.e. the member providing access to the new client account being created)
- **Barcode**: Use the Auto-Generated code or Enter a new scan card/key fob code

## KEY FIELDS (Section 6)

- **Add Family Members**: Click the green ADD FAMILY MEMBERS button if new client has family members (i.e. sub/secondary accounts getting added at same time)

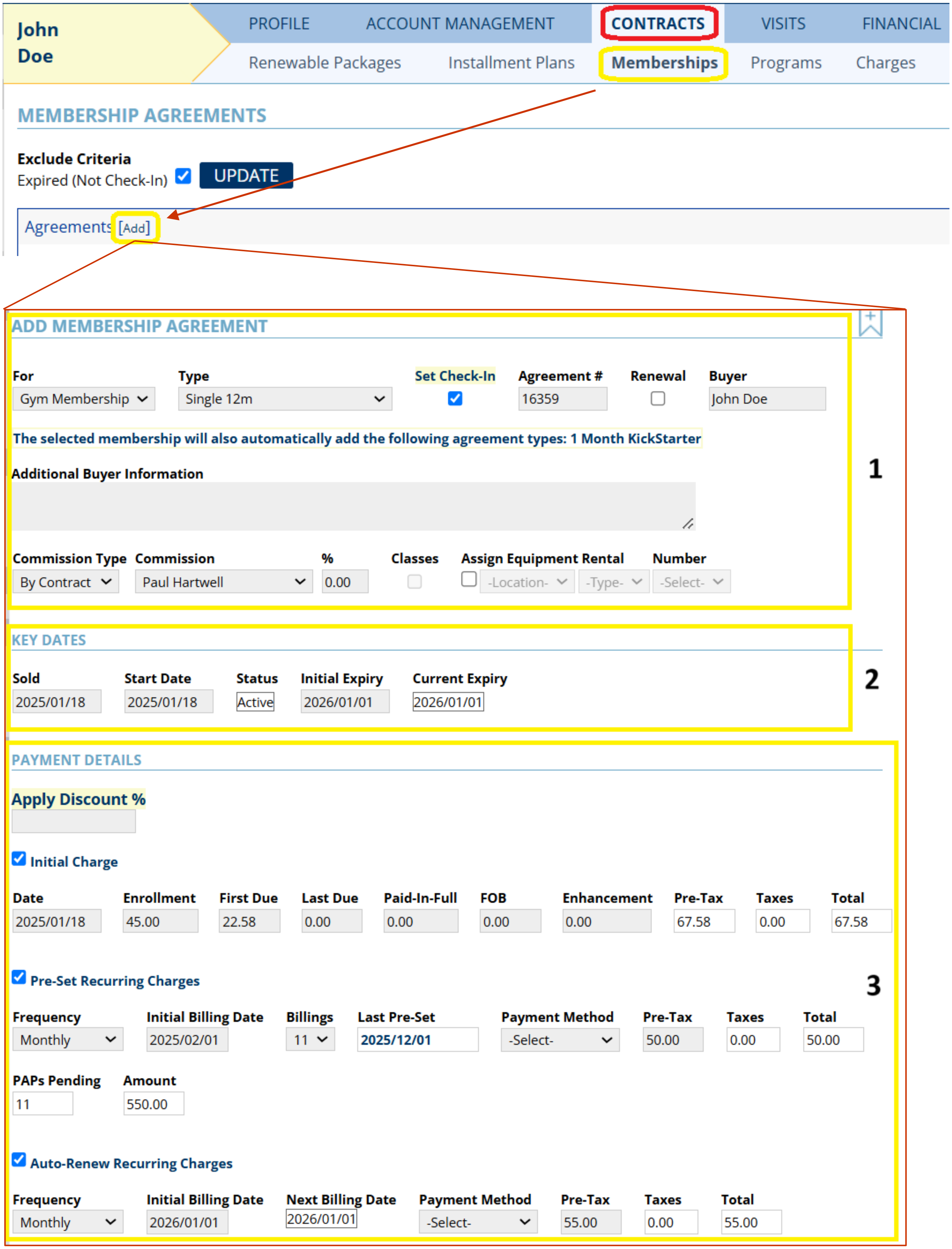

  - If new client is not paying for the recurring charges for the family members then set **Payment Responsibility to Paying for Self**
  - If new client is not sharing the membership agreement with the family members (i.e. each family member gets their own membership), then set **Check-In Status to Self-Managed**
  - Select ADD for each additional new family member being added, you must enter their **First Name and Last Name**; the other fields are optional

## KEY FIELDS (Section 7)

- **Referral Detail:** Input referral details as needed
- **Select Next Step:** Select desired destination page and click SAVE (i.e. Add Membership if you want to add the new client's membership after adding their new account)

# Adding a Membership Agreement

After selecting a client's account, top menu: **CONTRACTS** > **Memberships** > [Add] *(in table title)*



**KEY FIELDS (Section 1)**

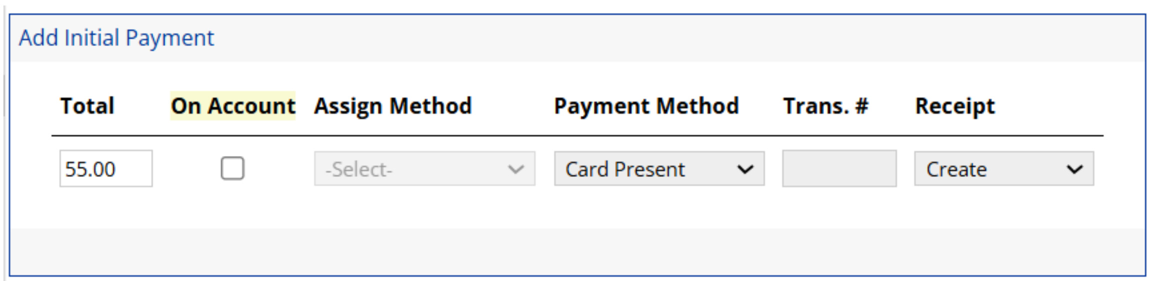
- **For** and **Type**: Set their values to the membership agreement that is being sold
  - After the Type selection is made, the system will automatically populate all the key dates and payment amounts tied to the selected membership
- **Set Check-in:** If this membership type will be responsible for determining the member's check-in status into the club/gym then leave this box checked. If the membership type not responsible for determining the member's check-in status then uncheck the box.
- **Renewal:** If adding a new membership for a previous member, click Renewal box
- **Additional Buyer Information:** Enter information if there is extra information related to the sold membership
- **Commission:** If tracking sales rep, set accordingly (default value is User entering membership)

**KEY FIELDS (Section 2)**

- **Sold Date:** Verify correct Sold Date of membership. Update if a sold membership is from an earlier date.
- **Start Date:** Verify correct Start Date of membership. Update if membership is to start on a future date.
- **Initial Expiry**: Verify correct Expiry Date of membership. Update to set the members' last day of access at the club/gym

**KEY FIELDS (Section 3)**

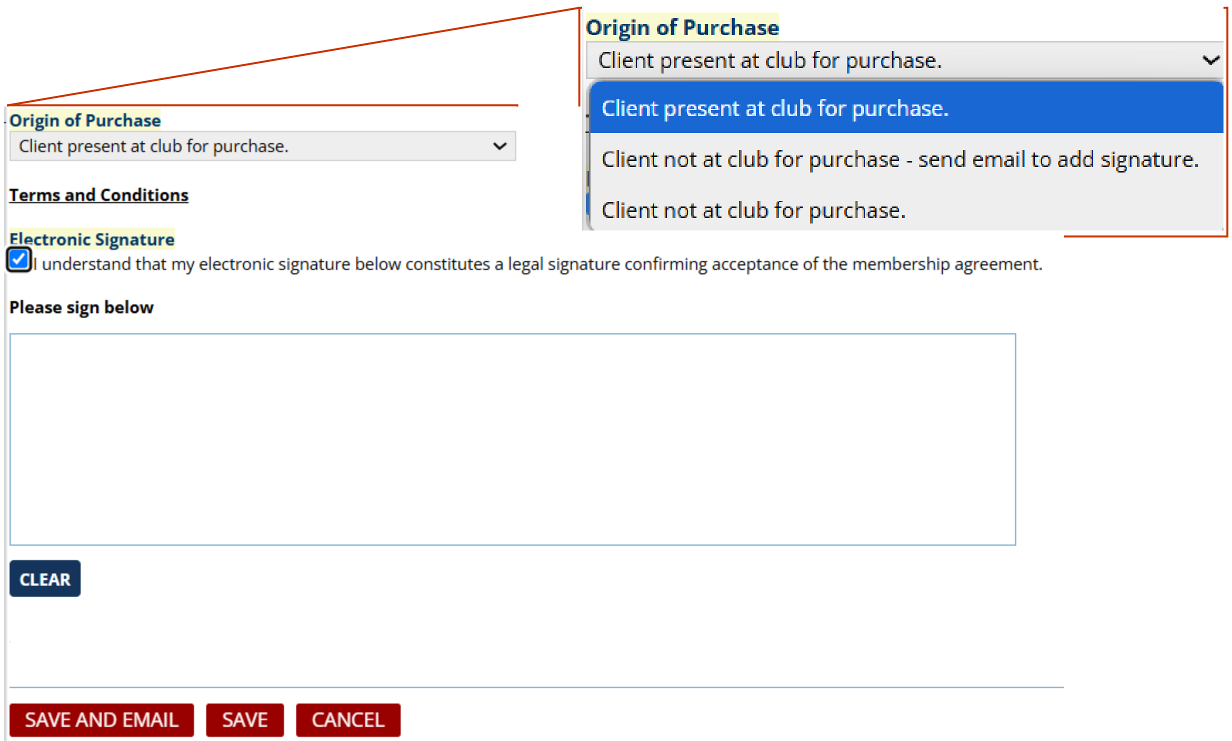
- **Apply Discount %:** This will apply a % to the full membership; Initial Charge and Recurring Charges.
- **Initial Charge:** Details the amount owing at time of sale (i.e. what the member owes as of today), if there is amount owing at time of sale then the Initial Charge box will be checked.




- **Add Initial Payment:** Verify total of the correct amount owing at time of sale; set **Payment Method** to the payment type being used. If client will be paying at a later date check **On Account** box **and** set **Assign Method**; if client is making payment today.
- **Pre-Set Recurring Charges:** Its box is only checked when the sold membership has a contract period for its recurring membership charges; if so:
  - **Initial Billing Date** indicates the date when the 1st recurring charge will occur; **Billings** indicates the number of contractual charges, and **Last Pre-Set** indicates the date when final contractual charge; set

**Payment Method** to the payment method being used for the recurring charge; verify **Total** displays the correct recurring amount to be charged

- **Auto-Renew Recurring Charges:** Its box is only checked when the sold membership has an open-ended recurring membership charge (i.e. recurring amount charged until membership is cancelled); if so, **Initial Billing Date** indicates the initial date when this auto-renew recurring charge will occur; set **Payment Method** to the payment method being used for the recurring charge; verify **Total** displays the correct recurring amount to be charged

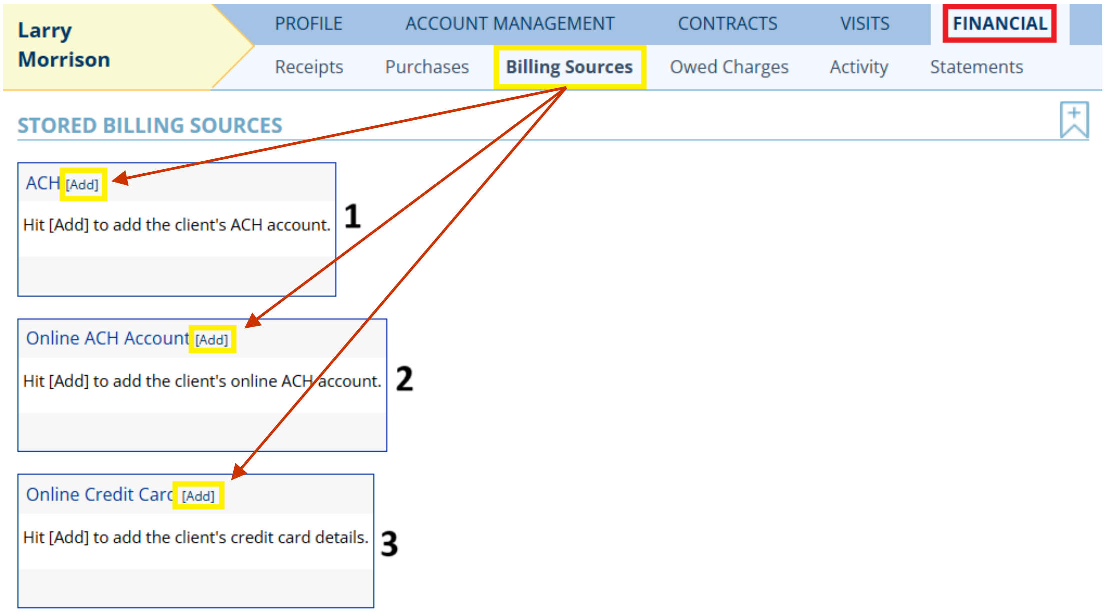



- Once Membership Agreement has been correctly completed, select Origin of Purchase
  1. Client Present at club for purchase
  2. Client not at club for purchase – send email to add signature
  3. Client not at club for purchase
- Electronic Signature check box to add signature in the signature box. Use signature pad to insert signature.

** Click* SAVE and EMAIL *(if you want to email client membership PDF) or* SAVE *after all information is entered and verified*

# Adding Billing Information - US Clients

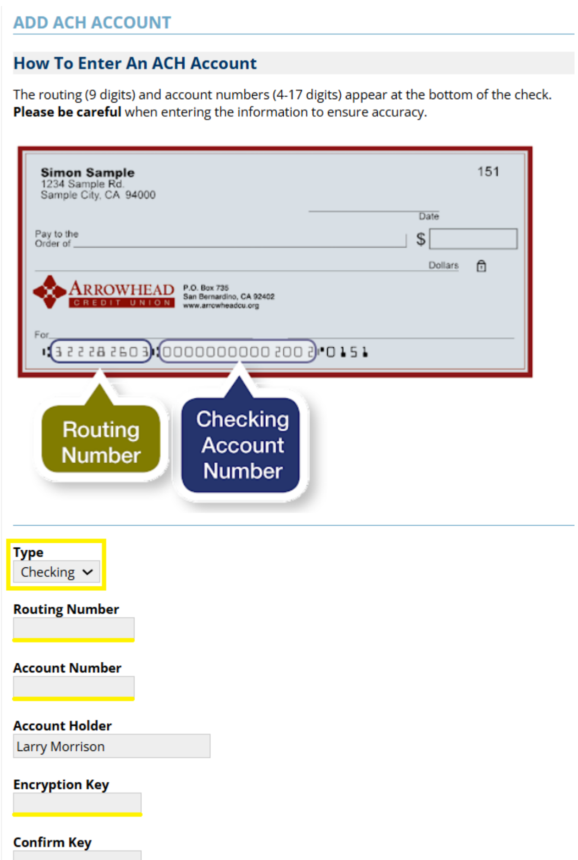
After selecting a client account, top menu: **FINANCIAL**>**Billing Sources** > [Add]




## ADD PAGE FOR DIFFERENT BILLING SOURCES

1. **Adding ACH** *(for US clubs that self-manage their ACH billing)*

* club's billing key is needed to enter Encryption Key

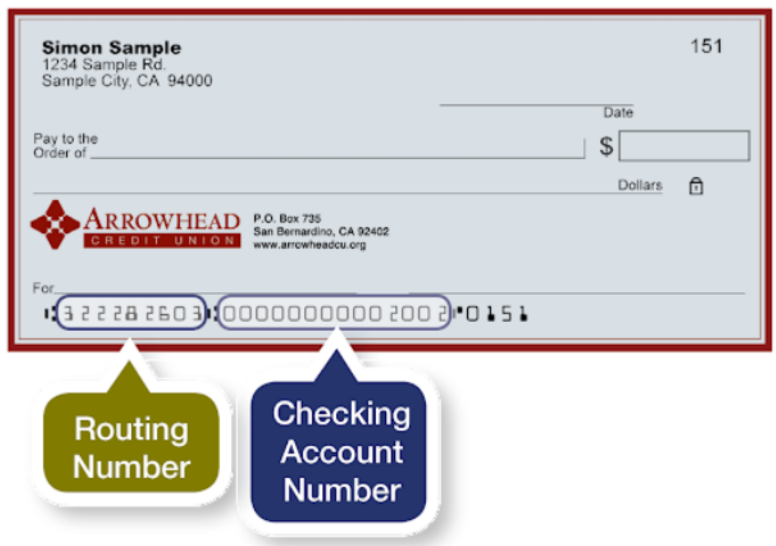


2. **Adding Online ACH** *(for US clubs that automate their ACH billing)*

ADD ONLINE ACH ACCOUNT

**How To Enter An ACH Account**

The routing (9 digits) and account numbers (4-17 digits) appear at the bottom of the check.
**Please be careful** when entering the information to ensure accuracy.




**Type**
Checking

**Routing Number**

**Account Number**

3. **Adding Online Credit Card** *(for all US clubs)*

*some clients may see a CSV field – this can be left blank

ADD ONLINE CREDIT CARD

**Card Type**
Visa

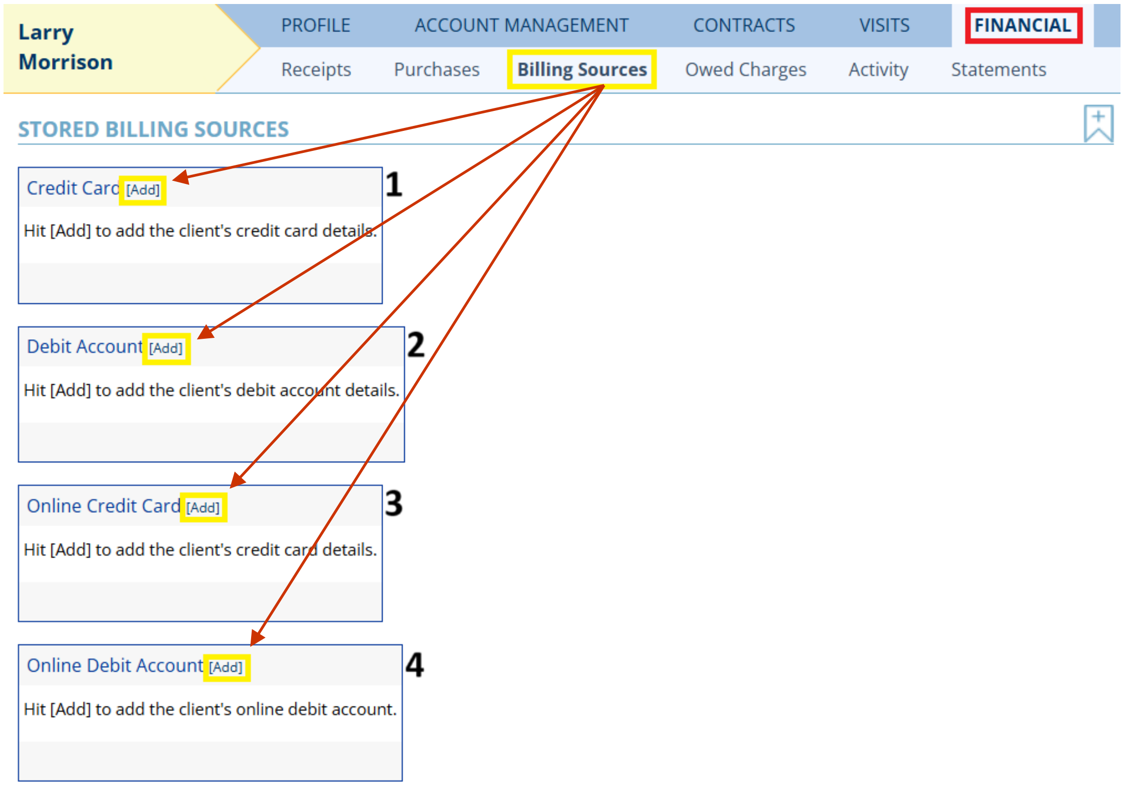
**Card Number**

**Cardholder Name**
Larry Morrison

**Expiry Date**
-- --

# Adding Billing Information - Canadian Clients

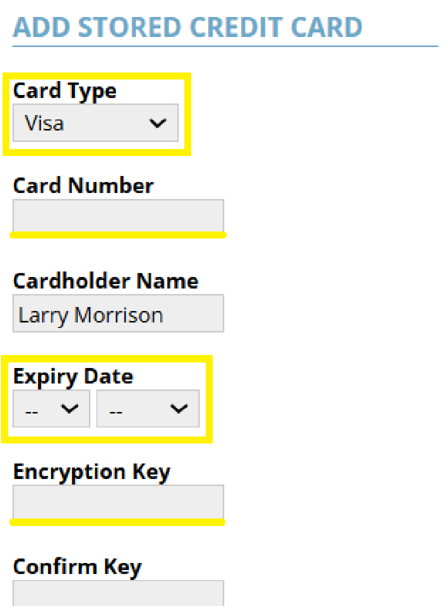
After selecting a client account, top menu: **FINANCIAL** > **Billing Sources** > [Add]




## ADD PAGE FOR DIFFERENT BILLING SOURCES

1. **Adding Credit Cards** *(for CDN clubs that self-manage their credit card billing)*

*ONLY available to legacy CDN clients; the club's billing key is needed to enter Encryption Key



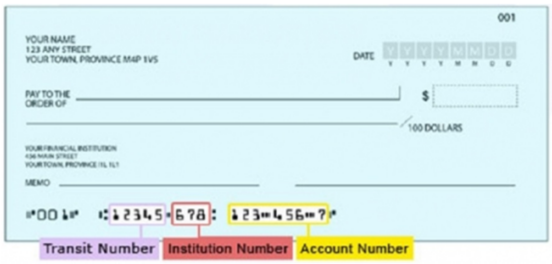
## 2. **Adding Debit** *(for CDN clubs that self-manage their EFT Debit billing)*

*club's billing key is needed to enter Encryption Key

**ADD DEBIT ACCOUNT**

**How To Enter A Debit Account**

The transit (5 digits), institution (3 digits) and account (7-12 digits) numbers appear at the bottom of the cheque. Should the account number have less than 7 digits, pad it by adding 0 at the beginning. **Please be careful** when entering the information to ensure accuracy.




**Transit Number**

**Institution Number**

**Account Number**

**Account Holder**
Larry Morrison

**Encryption Key**

**Confirm Key**

## 3. **Adding Online Credit Card** *(for CDN clubs that automate credit card payments)*

**ADD ONLINE CREDIT CARD**

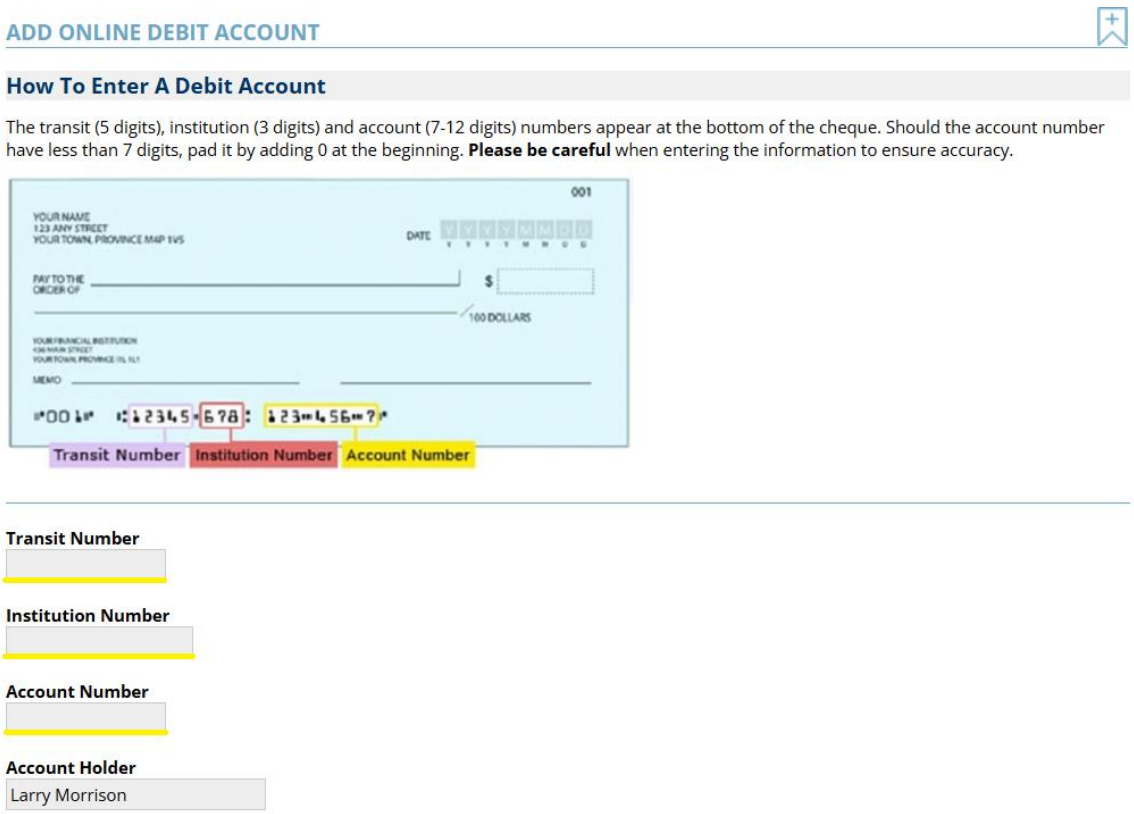
**Card Type**
Visa

**Card Number**

**Cardholder Name**
Larry Morrison

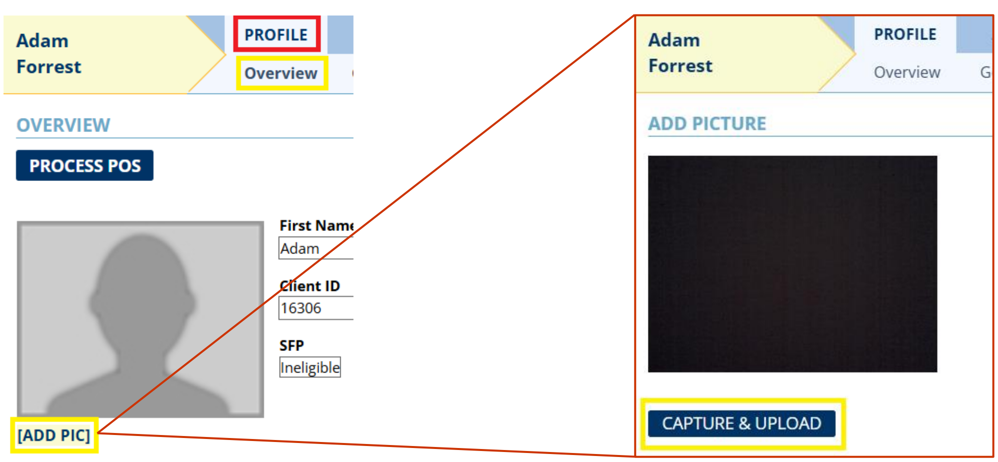
**Expiry Date**
-- --

4. **Adding Online Debit** *(for CDN clubs that automate EFT Debit payments)*




# Adding/Updating A Member Picture

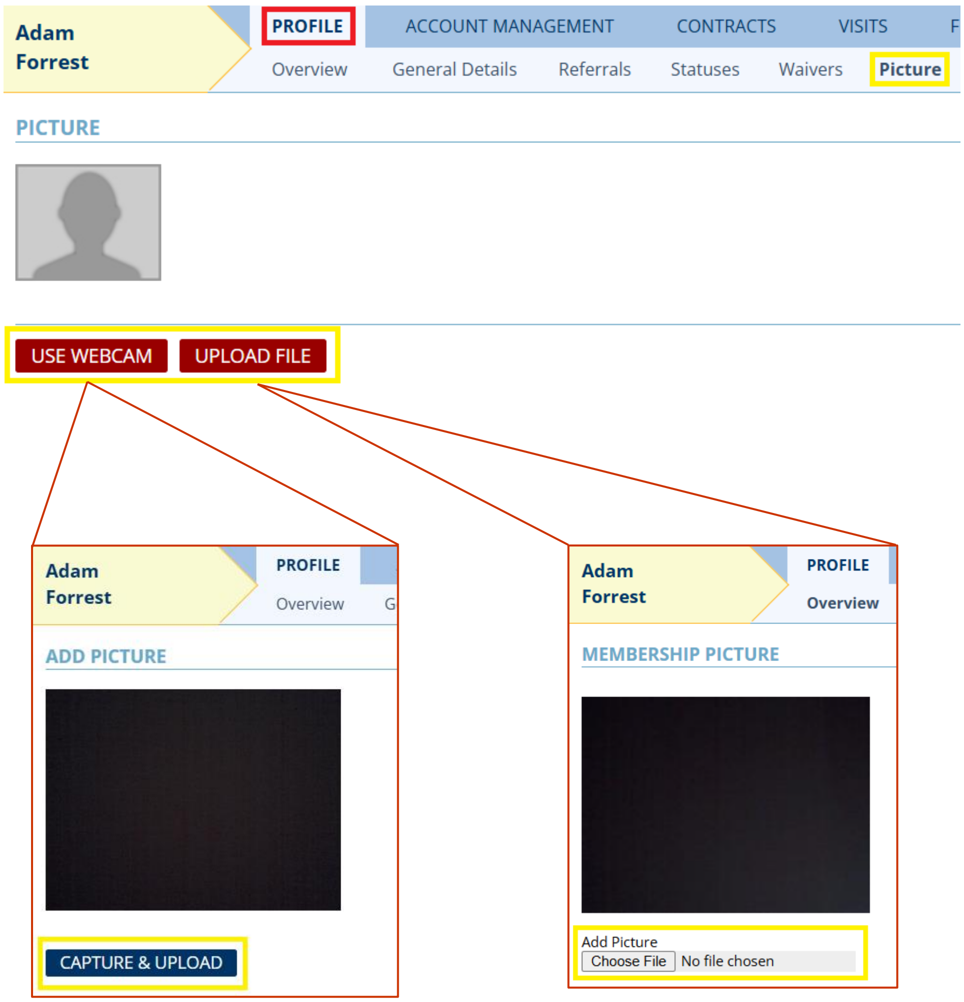
1. After selecting a client account, top menu: **PROFILE** > **Overview**> [Add PIC] or [EDIT PIC]



**OR**

2. After selecting a client account, top menu: **PROFILE** > **Picture** > USE WEBCAM or UPLOAD FILE

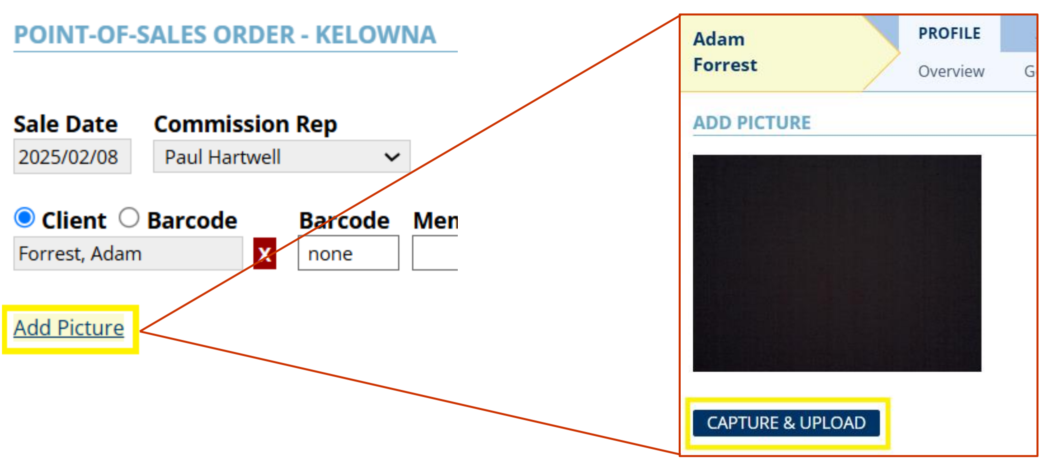
   * This option allows you to use a webcam or upload a file for member's picture




**OR**

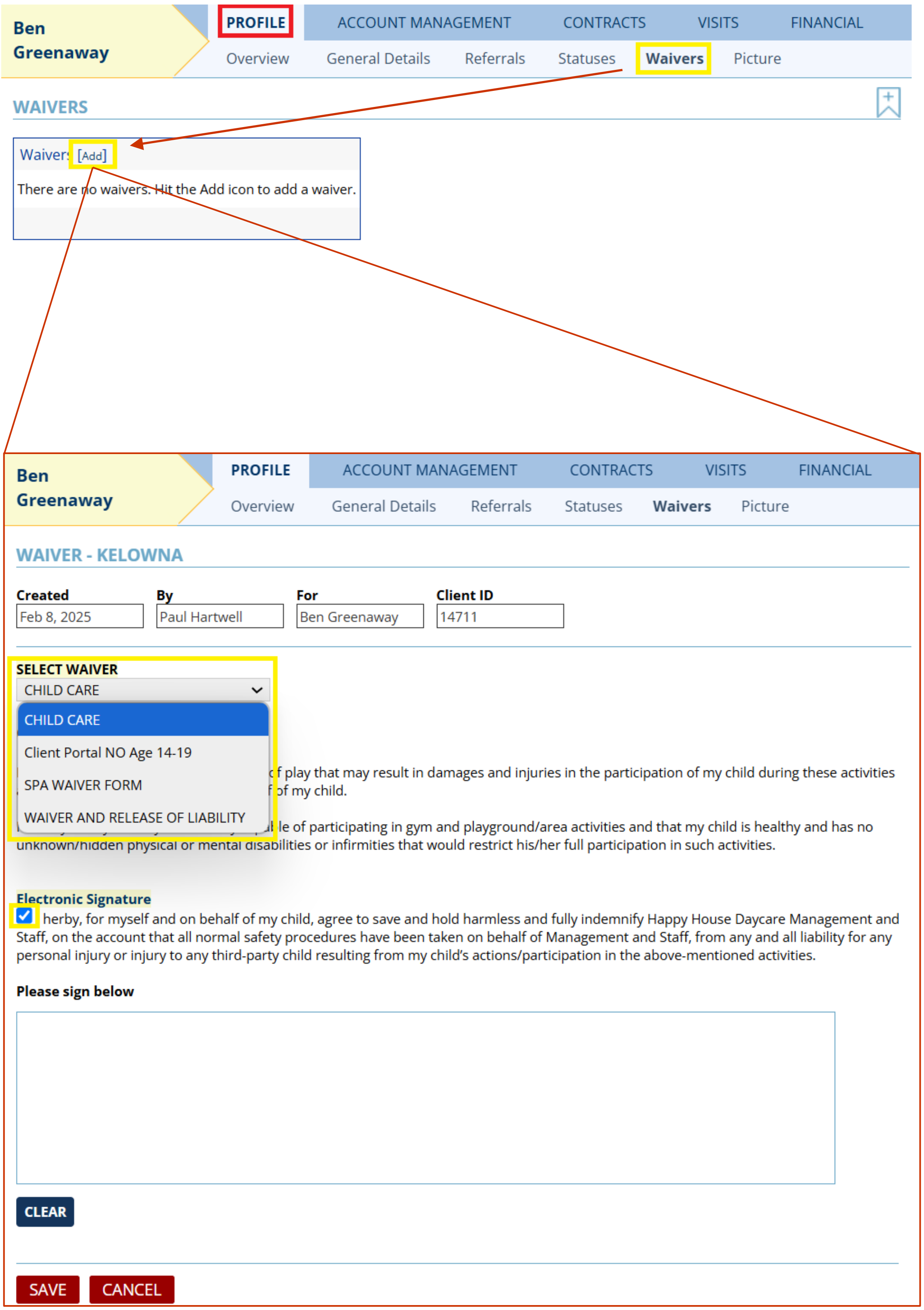
3. In **POINT-OF-SALES** > Add Picture

   *This option will only have Add Picture if there is no Profile Picture, otherwise it will show View Picture



# Adding A Waiver

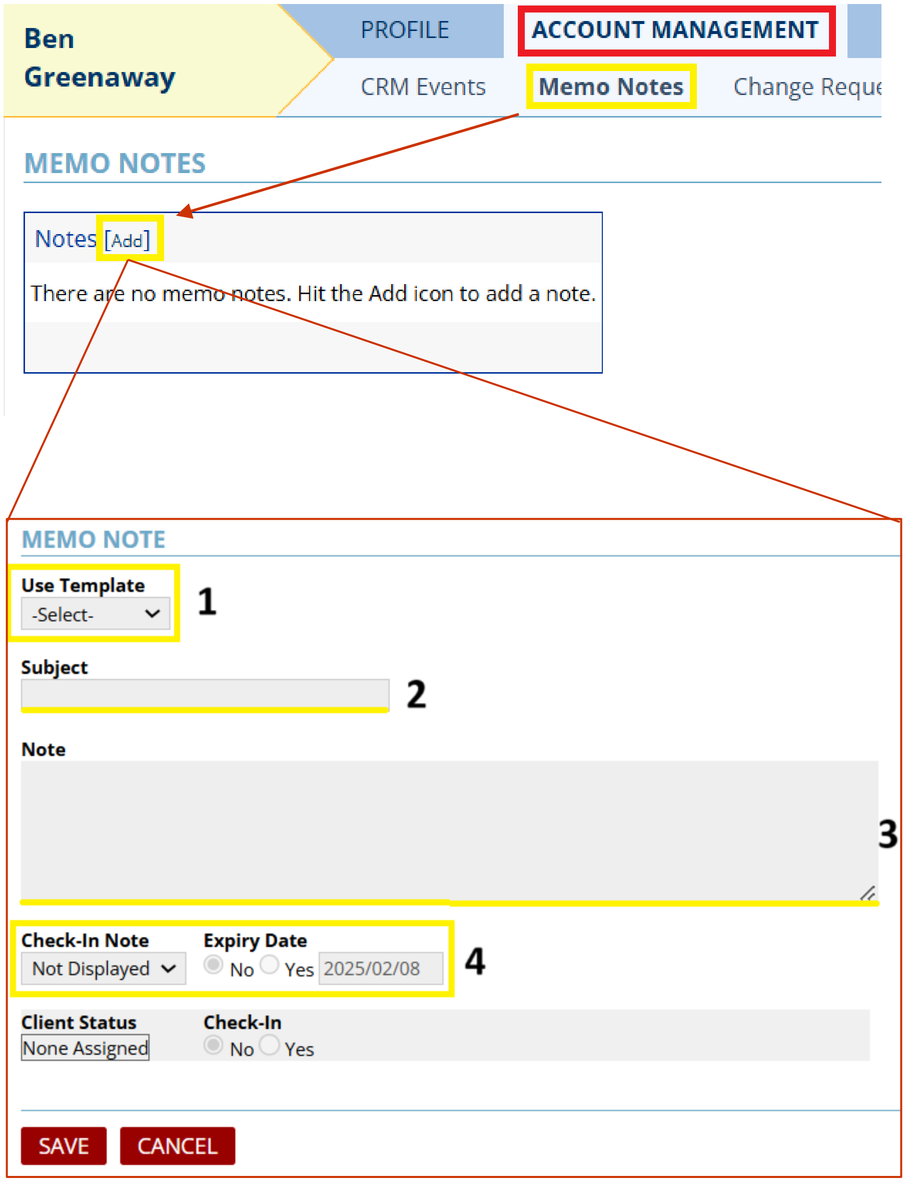
After selecting a client account, top menu: **PROFILE > Waivers >** [Add]




**SELECT WAIVER** to sign > Check **Electronic Signature** box > Sign > SAVE

# Adding Memo Notes

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Memo Notes** > [Add]



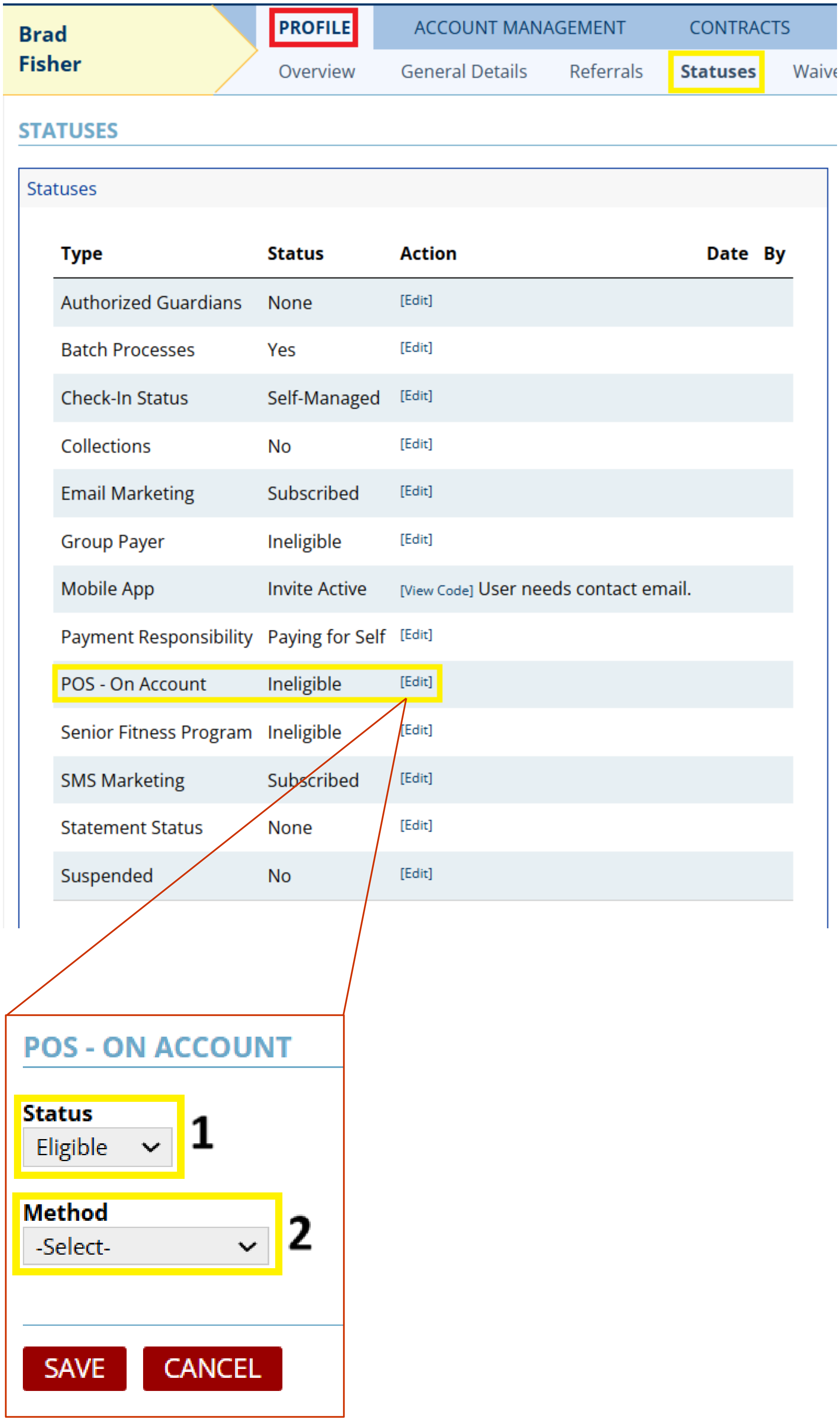

## KEY FIELDS

1. **Use Template**: Optional - Select a Memo Note template with preset field values
2. **Subject**: Enter subject for memo note
3. **Note**: Enter note for memo note
4. **Check-In Note**
   a. **Not Displayed** – memo note will not appear on the check-in page
   b. **Unflagged** – memo note will appear in the Other Notes section on check-in page
   c. **Flagged** – memo note will appear in the Flagged Notes section (creates ALERT flag); use **Expiry Date** if you want to flagged note to flip to unflagged on a specific date

SAVE

## Adding/Updating POS - On Account Eligibility (i.e., House Charges)

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] *(in **POS - On Account** row)*



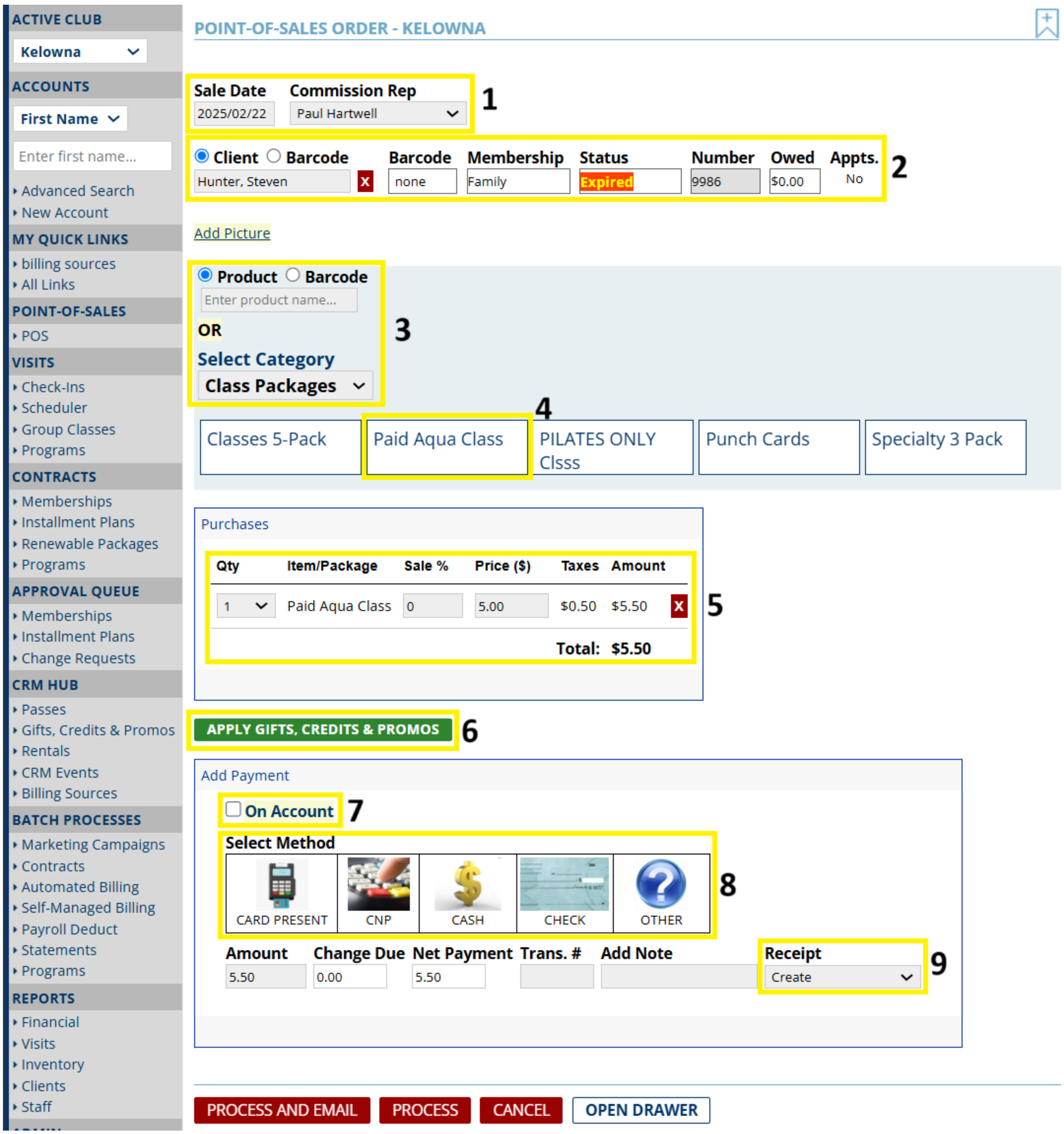
**KEY FIELDS**

1. **Status**: Set to Eligible if client should be allowed house charges for POS purchases; set to Ineligible if client is no longer allowed house charges for POS purchases
2. **Method**: When Status is Eligible, then set Method to payment method assigned for any house charges for POS purchases.

SAVE

## Adding Point of Sale (POS) Purchase

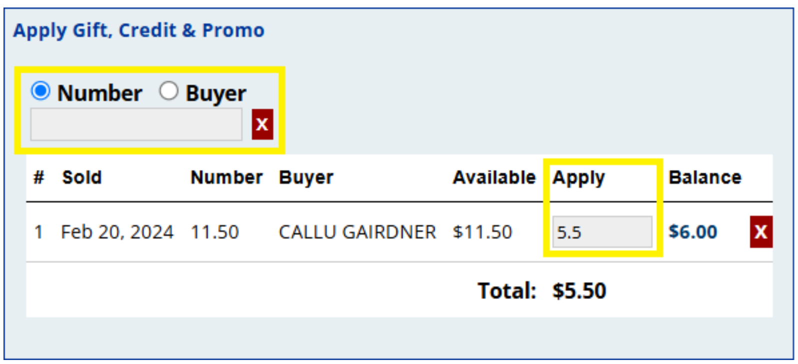
Left-side menu: **POINT-OF-SALES** > POS



## KEY FIELDS

1. **Sale Date**: If recording sale from before today, set accordingly

   **Commission Rep**: If tracking sales rep for POS sale, set accordingly
2. **Client** or **Barcode**: Set client making purchase by using **Client** (by last name) or **Barcode** filter
   a. Take note of client's membership status, current balance (Bal.) and outstanding gift cards (GCs)
3. **Enter UPC Barcode** or **Select Category:** Pull up sale item either by either scanning product's barcode or Select Category drop-down
4. **Select Item:** When using Select Category drop-down, select the Category the item is listed under >click on the item being purchased, every click on an item will increase its quantity (Qty) to be sold
5. **POS-Purchases**: If applicable, set Qty (quantity), Sale %, and Price accordingly
   a. Click **red** X button if the item should no longer be sold
6. **APPLY GIFTS, CREDITS, & PROMOS**: Click **GREEN** button if client wants to redeem a gift card/certificate/credit towards their POS purchase
   a. A gift card/certificate/credit can be found by using either the **Number** or **Buyer** filter; multiple ones can be used for the same POS purchase
   b. Set **Apply** amount accordingly




7. **On Account:** If client is allowed house charges, click On Account box
8. **Select Method**
   a. **CARD PRESENT**: Initiates the integrated POS Terminal for a card present payment (i.e. client taps/swipes/inserts their credit card)
   b. **CNP**: Initiates the integrated POS Terminal for a card not present payment (i.e. staff manually keys in the client's credit card)

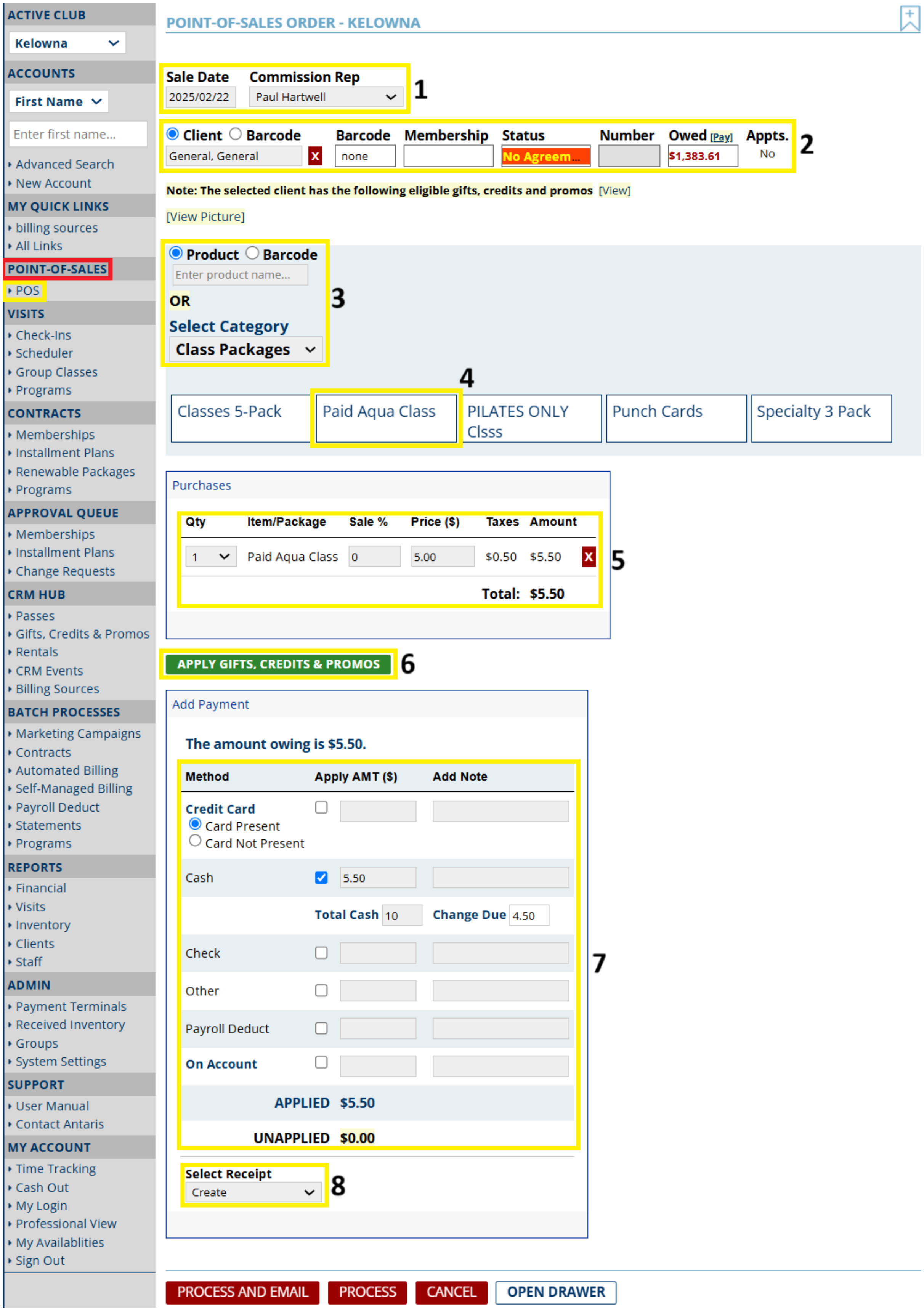
   ***Both CARD PRESENT and CNP are only available for US clients using an integrated POS Terminal****; otherwise staff member records payment method (eg. Visa, MC) used for POS purchase made in stand-alone POS Terminal that isn't connected to Antaris POS page*

   c. **ONLINE CC**: Uses the client's stored credit card for real-time credit card payment
9. **Receipt**: Select correct "Create & Print" option for your printer

PROCESS AND EMAIL OR PROCESS

# Adding Point of Sale (POS) Purchase (w/Split Payment Option)

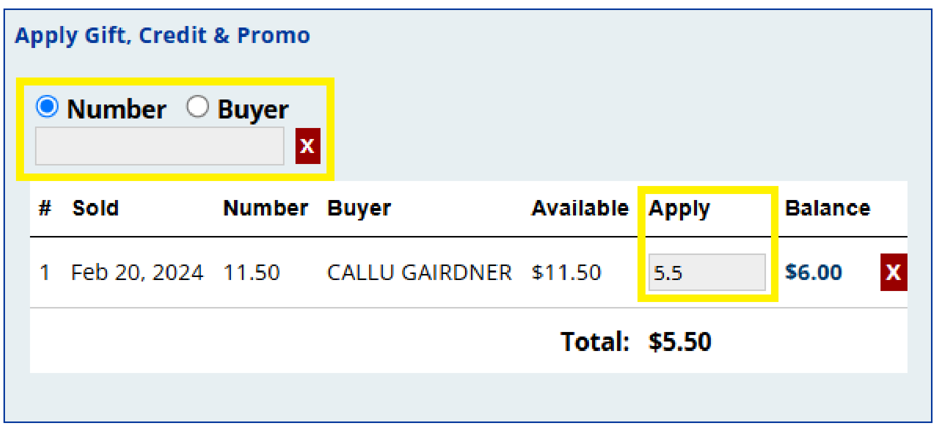
Left-side menu: **POINT-OF-SALES**>POS



**KEY FIELDS**

1. **Sale Date**: If recording sale from before today, set accordingly

   **Commission Rep**: If tracking sales rep for POS sale, set accordingly
2. **Client** or **Barcode**: Set client making purchase by using **Client** (by last name) or **Barcode** filter
   a. Take note of client's membership status, current balance (Bal.) and outstanding gift cards (GCs)
3. **Enter UPC Barcode** or **Select Category:** Pull up sale item either by either scanning product's barcode or Select Category drop-down
4. **Select Item:** When using Select Category drop-down, select the Category the item is listed under >click on the item being purchased, every click on an item will increase its quantity (Qty) to be sold
5. **POS-Purchases**: If applicable, set Qty (quantity), Sale %, and Price accordingly
   a. Click **red** X button if the item should no longer be sold
6. **APPLY GIFTS, CREDITS, & PROMOS**: Click **GREEN** button if client wants to redeem a gift card/certificate/credit towards their POS purchase
   a. A gift card/certificate/credit can be found by using either the **Number** or **Buyer** filter; multiple ones can be used for the same POS purchase
   b. Set **Apply** amount accordingly

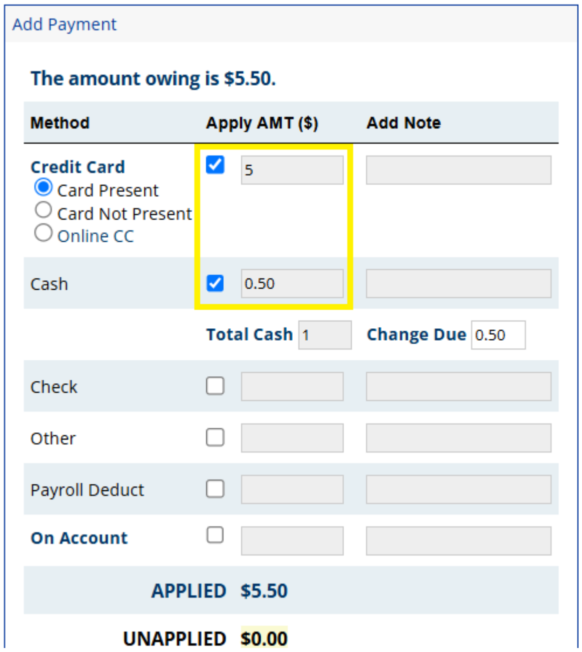



7. **Select Method**
   a. **Credit Card**
      1. **Card Present**: Initiates the integrated POS Terminal for a card present payment (i.e. client taps/swipes/inserts their credit card)
      2. **Card Not Present**: Initiates the integrated POS Terminal for acard not present payment (i.e. staff manually keys in the client's credit card)
      3. **ONLINE CC**: Uses the client's stored credit card for real-time credit card payment

***Both Card Present and Card Not Present are only available for US clients using an integrated POS Terminal****; otherwise staff member records payment method (eg. Visa, MC) used for POS purchase made in stand-alone POS Terminal that isn't connected to Antaris POS page*

b. **On Account:** If client is allowed house charges, click On Account box

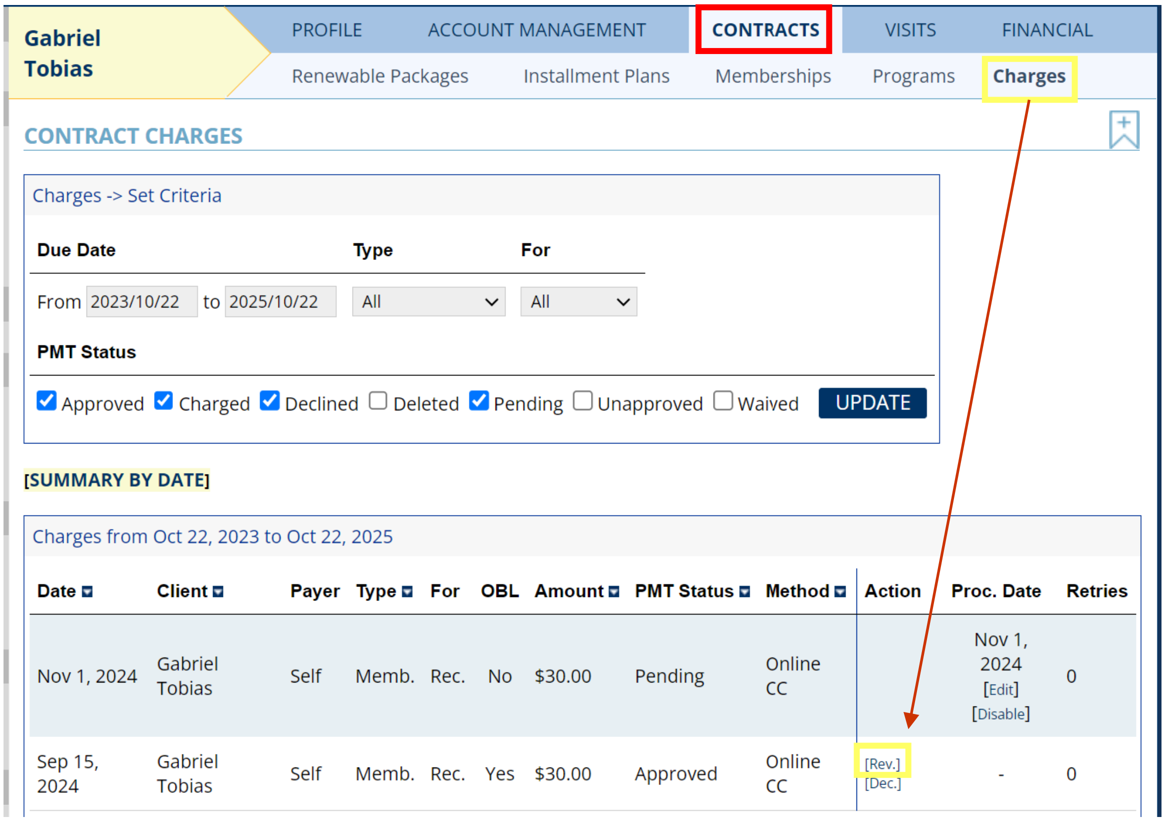
**Split Payments:** When processing a split payment, select the 1st payment method and adjust the amount. Then select the 2nd payment method and the remaining amount will be populated.

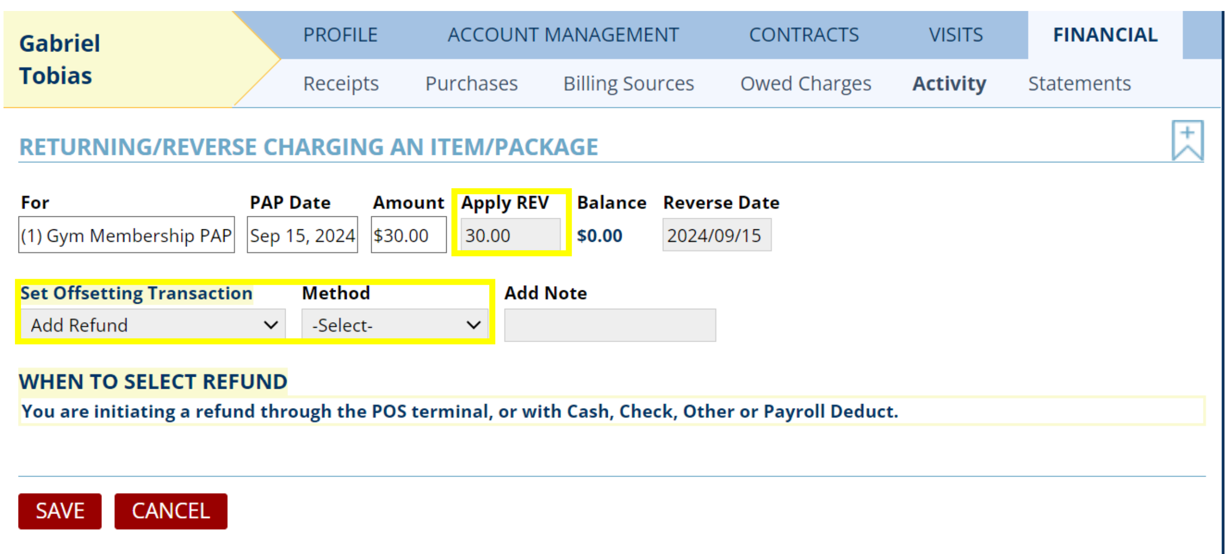



PROCESS AND EMAIL OR PROCESS

# Issuing Refunds/Reversals

1. For Memberships: After selecting a client account, top menu: **CONTRACTS** > **Charges** > [Rev]



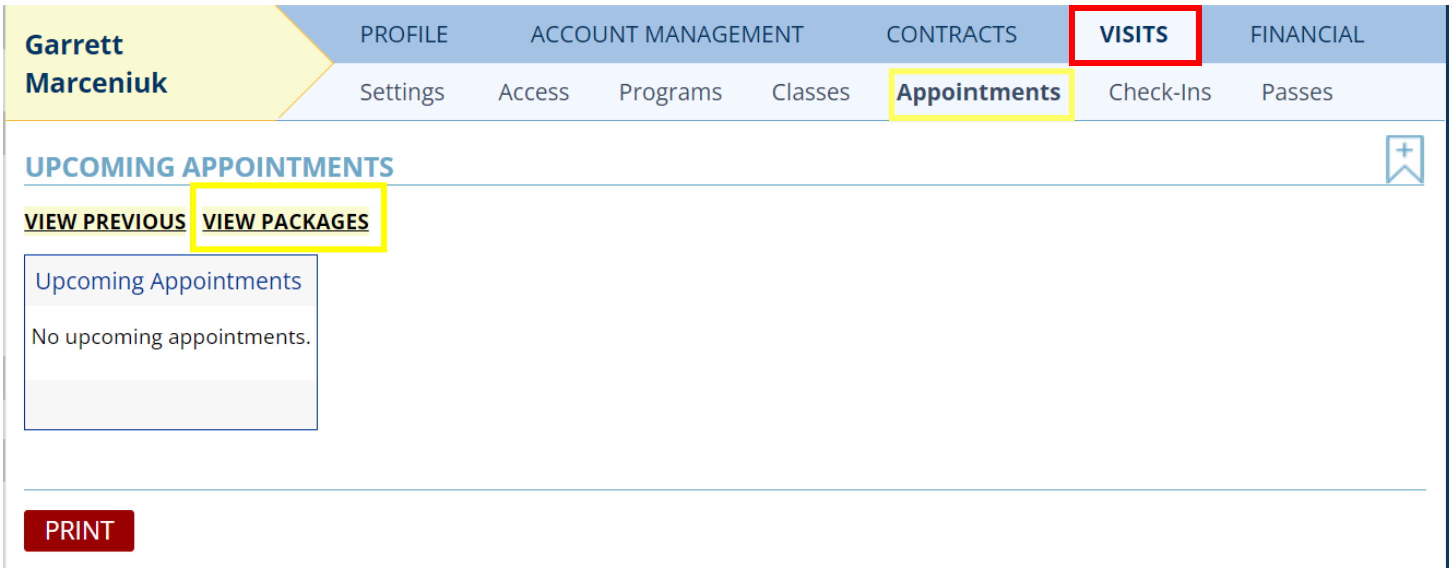



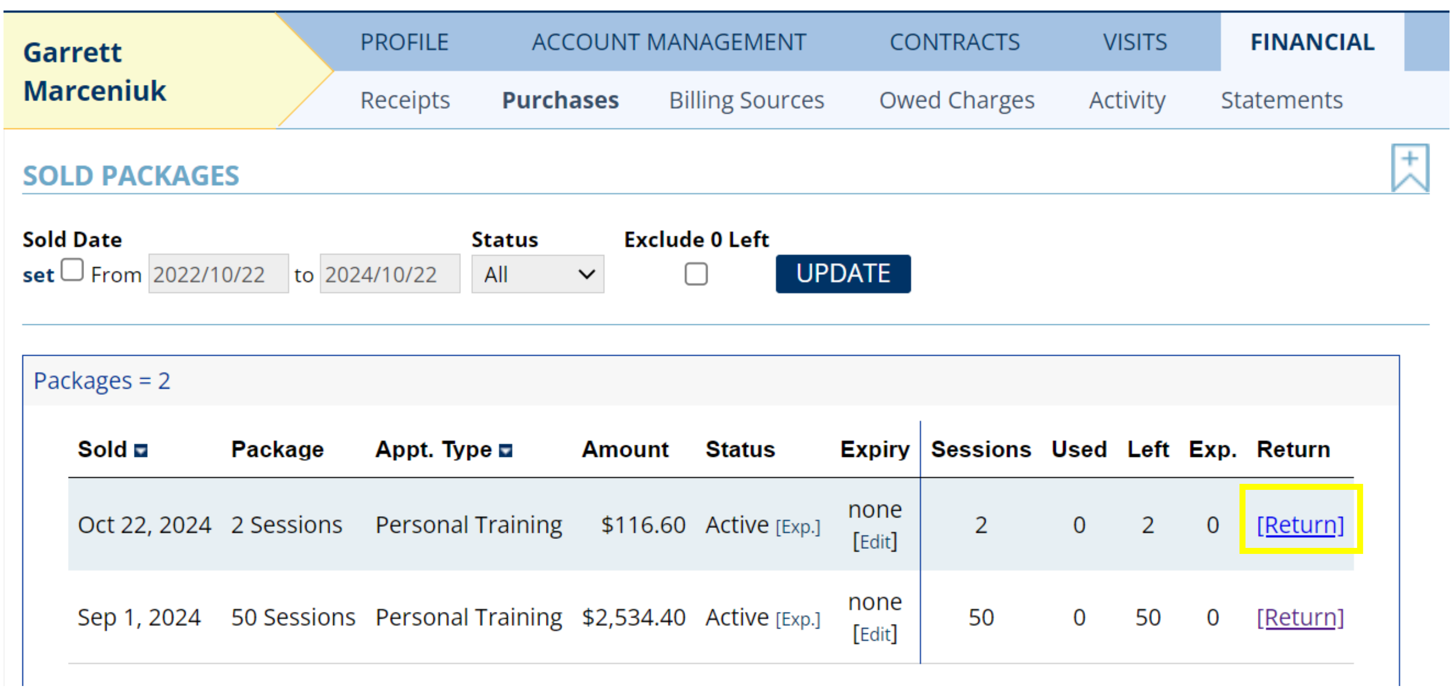

## Set Offsetting Transaction Options

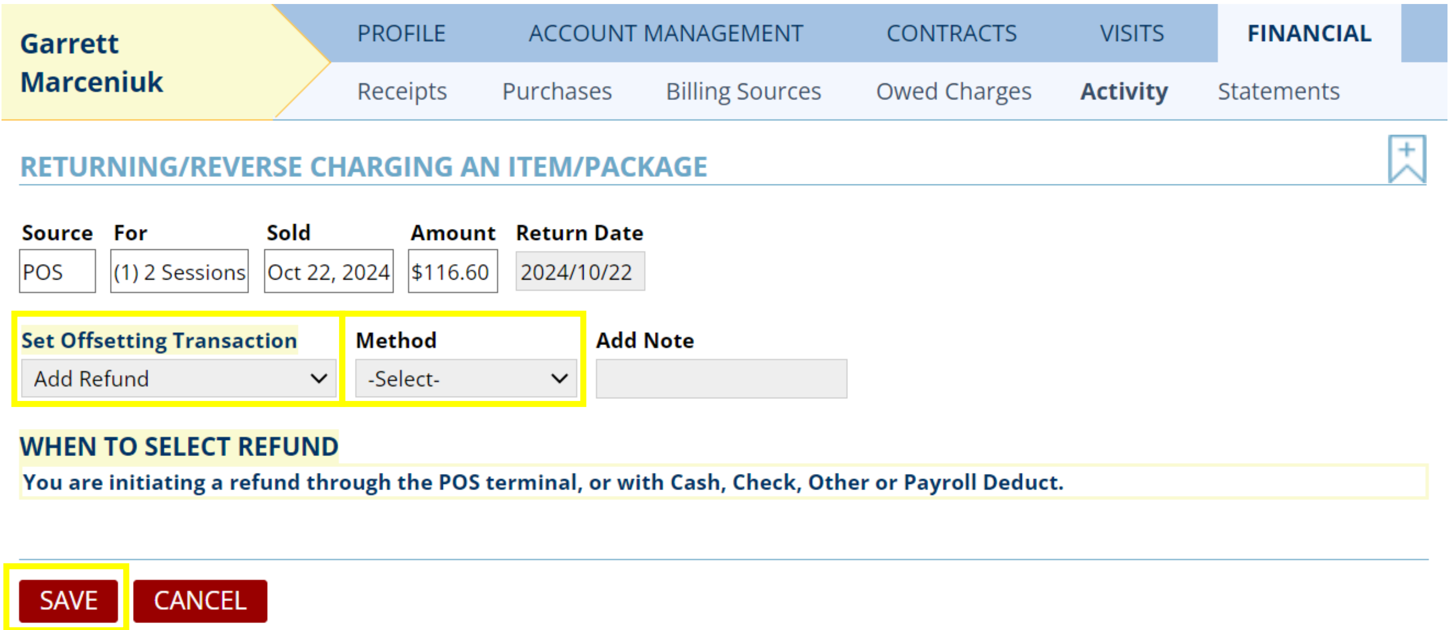
- **Add Refund –** you want to initiate a refund through the POS terminal (Card Present/Card Not Present) or with Cash, Check, Other or Payroll Deduct

- **Add Prepaid Credit –** you want to add a credit that can be manually applied to upcoming charges or POS sales *NOTE: credits are NOT AUTOMATICALLY APPLIED*
- **None (Will Apply Manually) –** you want to enter the offsetting transaction manually
- **Add Money to Online CC –** you want to refund directly to the credit card on file *NOTE: this option only appears for Clubs using FISERV CARDPOINTE SYSTEM and the Client has an Online CC on file*

2. For Packages: After selecting a client account, top menu: **VISITS > Appointments >** VIEW PACKAGES



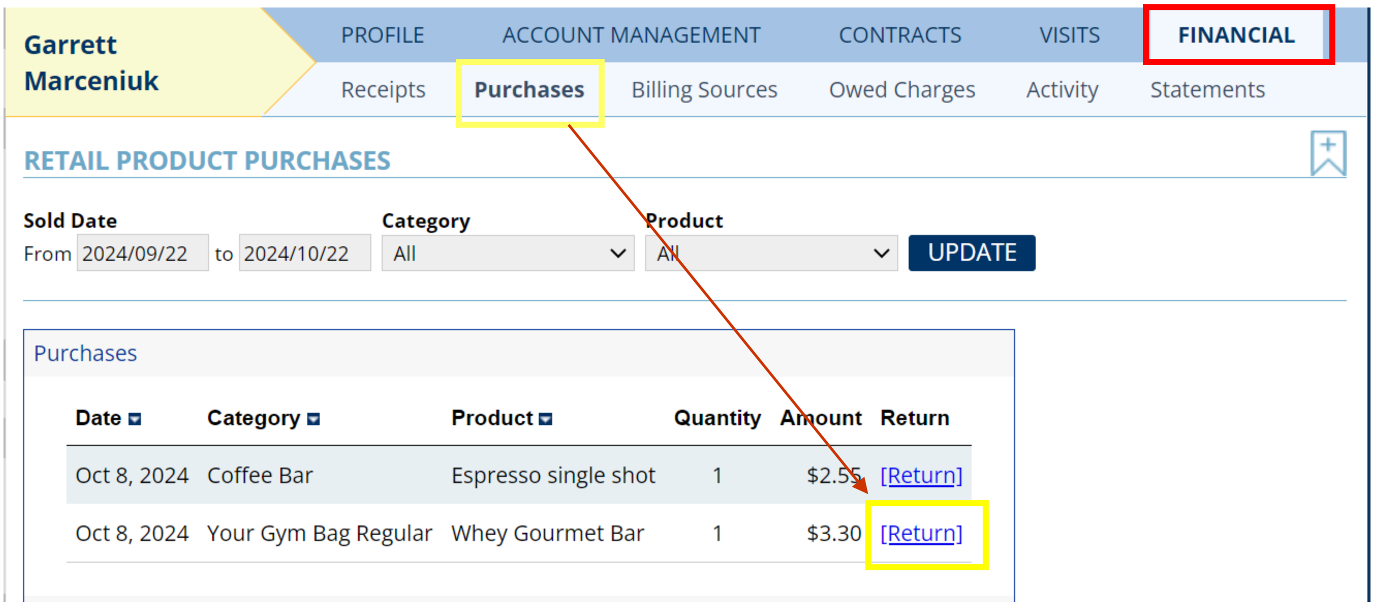



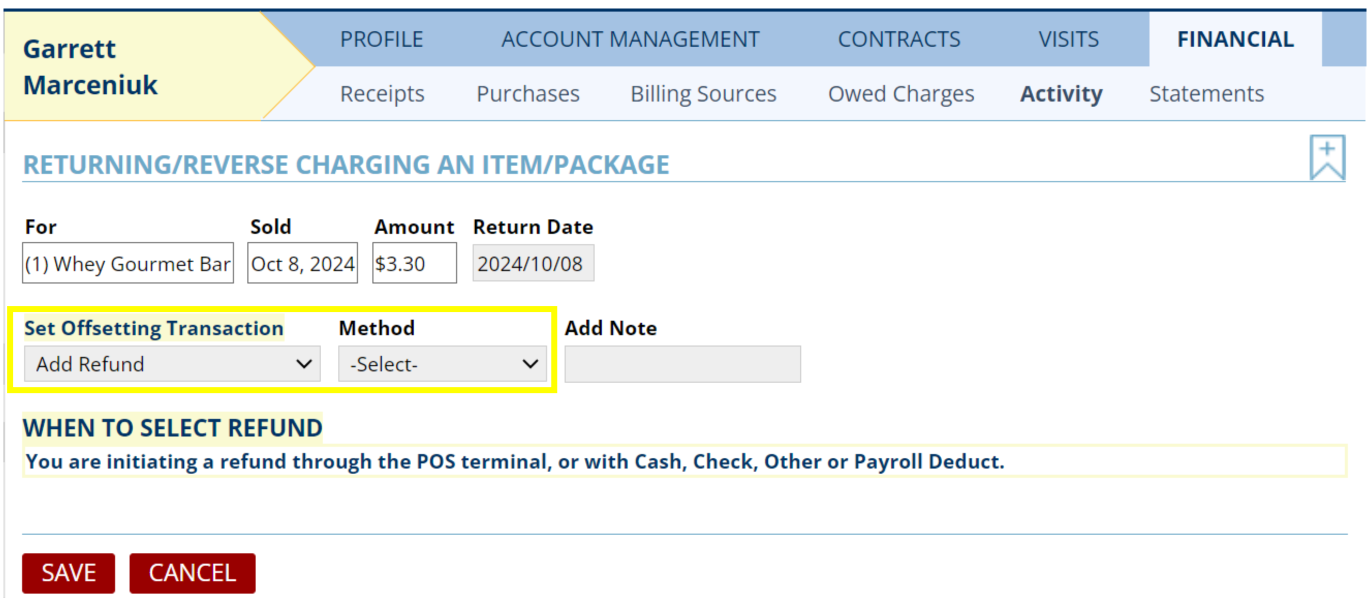



**Set Offsetting Transaction Options**

- **Add Refund –** you want to initiate a refund through the POS terminal (Card Present/Card Not Present) or with Cash, Check, Other or Payroll Deduct
- **Add Prepaid Credit –** you want to add a credit that can be manually applied to upcoming charges or POS sales *NOTE: credits are NOT AUTOMATICALLY APPLIED*
- **None (Will Apply Manually) –** you want to enter the offsetting transaction manually
- **Add Money to Online CC –** you want to refund directly to the credit card on file
  *NOTE: this option only appears for Clubs using FISERV CARDPOINTE SYSTEM and the Client has an Online CC on file*

3. For POS sales: After selecting a client account, top menu: **FINANCIAL** > **Purchases** > Retail Products > [Return]




**Set Offsetting Transaction Options**

- **Add Refund –** you want to initiate a refund through the POS terminal (Card Present/Card Not Present) or with Cash, Check, Other or Payroll Deduct
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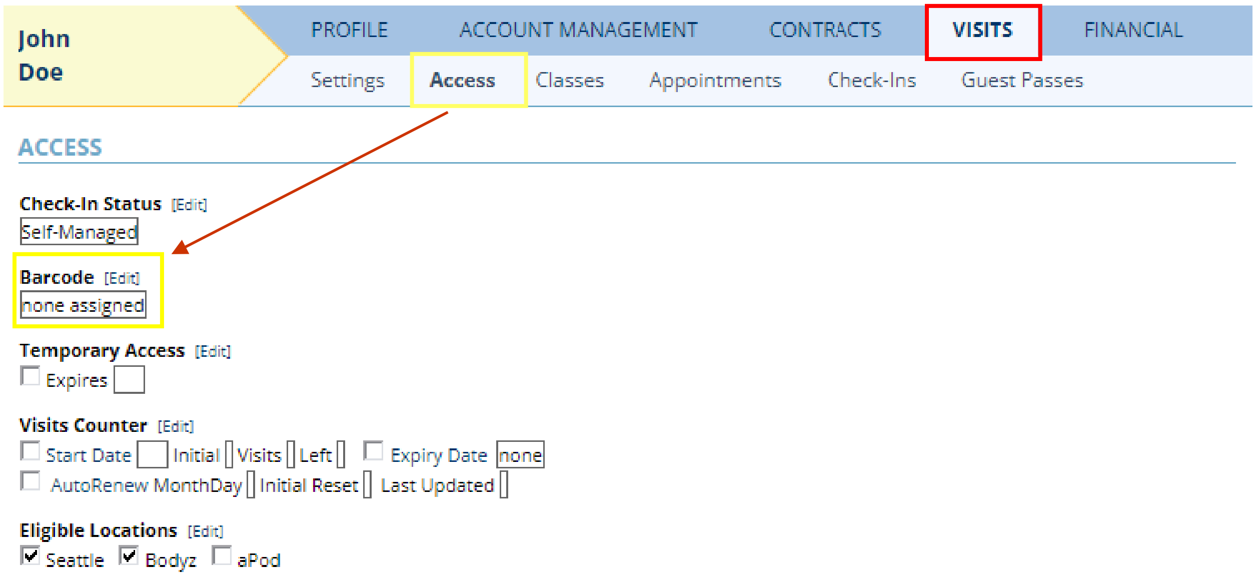
- **None (Will Apply Manually) –** you want to enter the offsetting transaction manually
- **Add Money to Online CC –** you want to refund directly to the credit card on file

  *NOTE: this option only appears for Clubs using FISERV CARDPOINTE SYSTEM and the Client has an Online CC on file*

## Adding/Updating A Barcode

*** If you know the client's scan card/fob when creating their account, see [Adding A New Client Account](#) "Barcode" section**

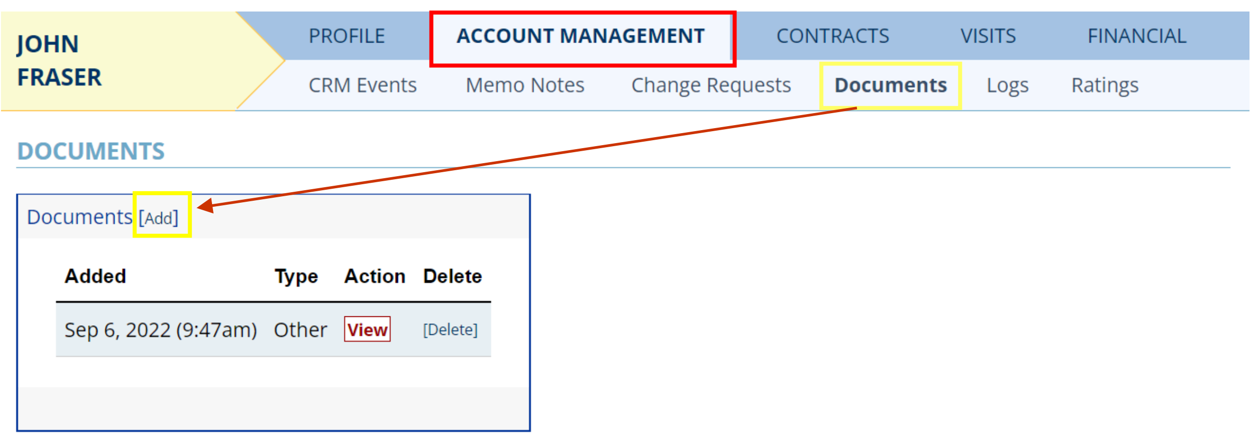
After selecting a client account, top menu: **VISITS**>**Access**>[Edit]




**NOTE:** Click **SAVE** after adding/updating the barcode

## Adding Client Document

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Documents** > [Add]

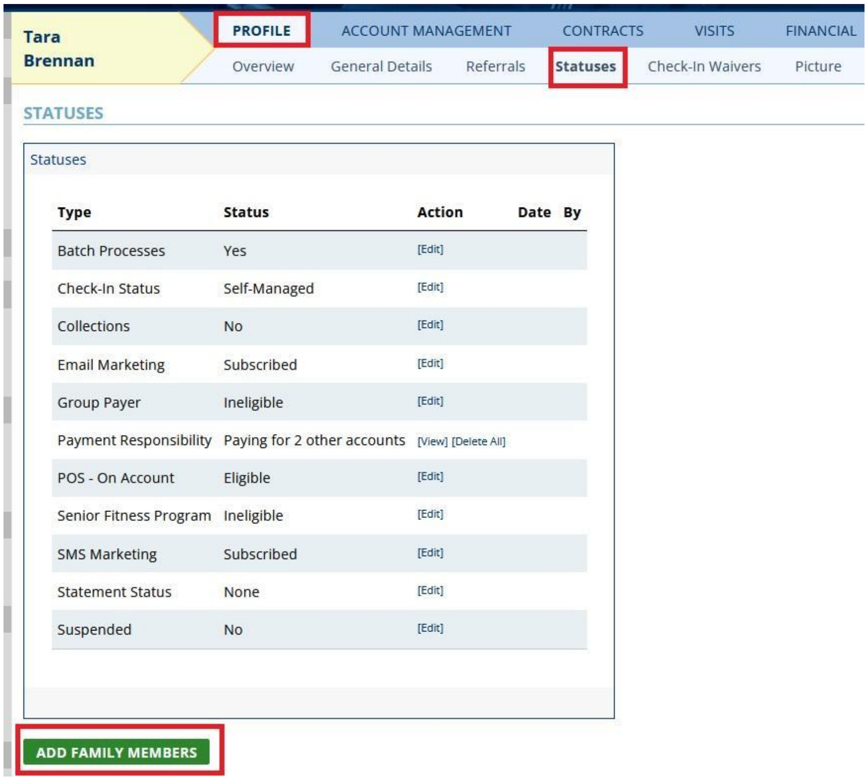


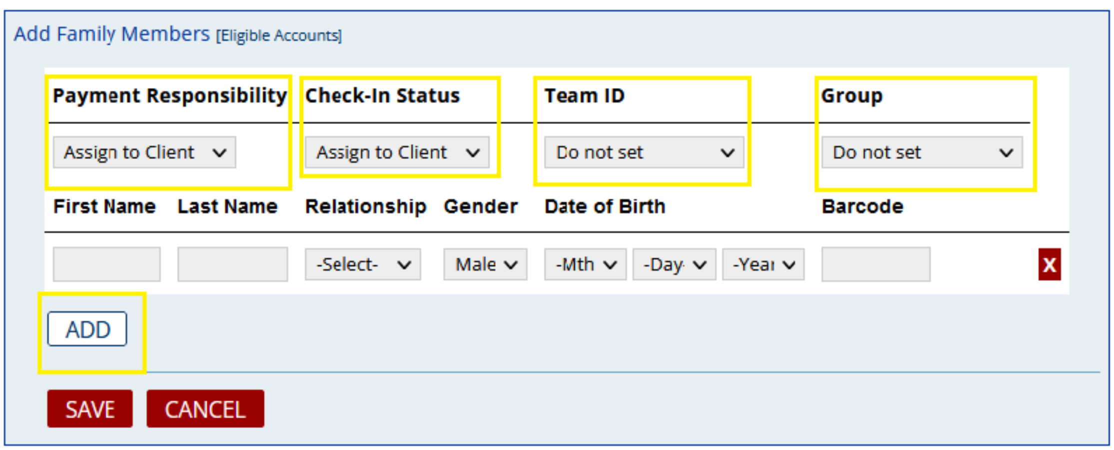

***NOTE**: from the **Add Document** window, set corresponding **Type**, **Choose File** for finding file to upload from computer (uploaded file cannot exceed 2MB and must be .jpg, pdf or .png format)*

# Adding Family Members

* If there is an existing client's family member's account, when creating their new account, see [Adding A New Client Account]" ADD FAMILY MEMBERS" section

After selecting a client account, top menu: **PROFILE** > **Statuses** > **ADD FAMILY MEMBERS**



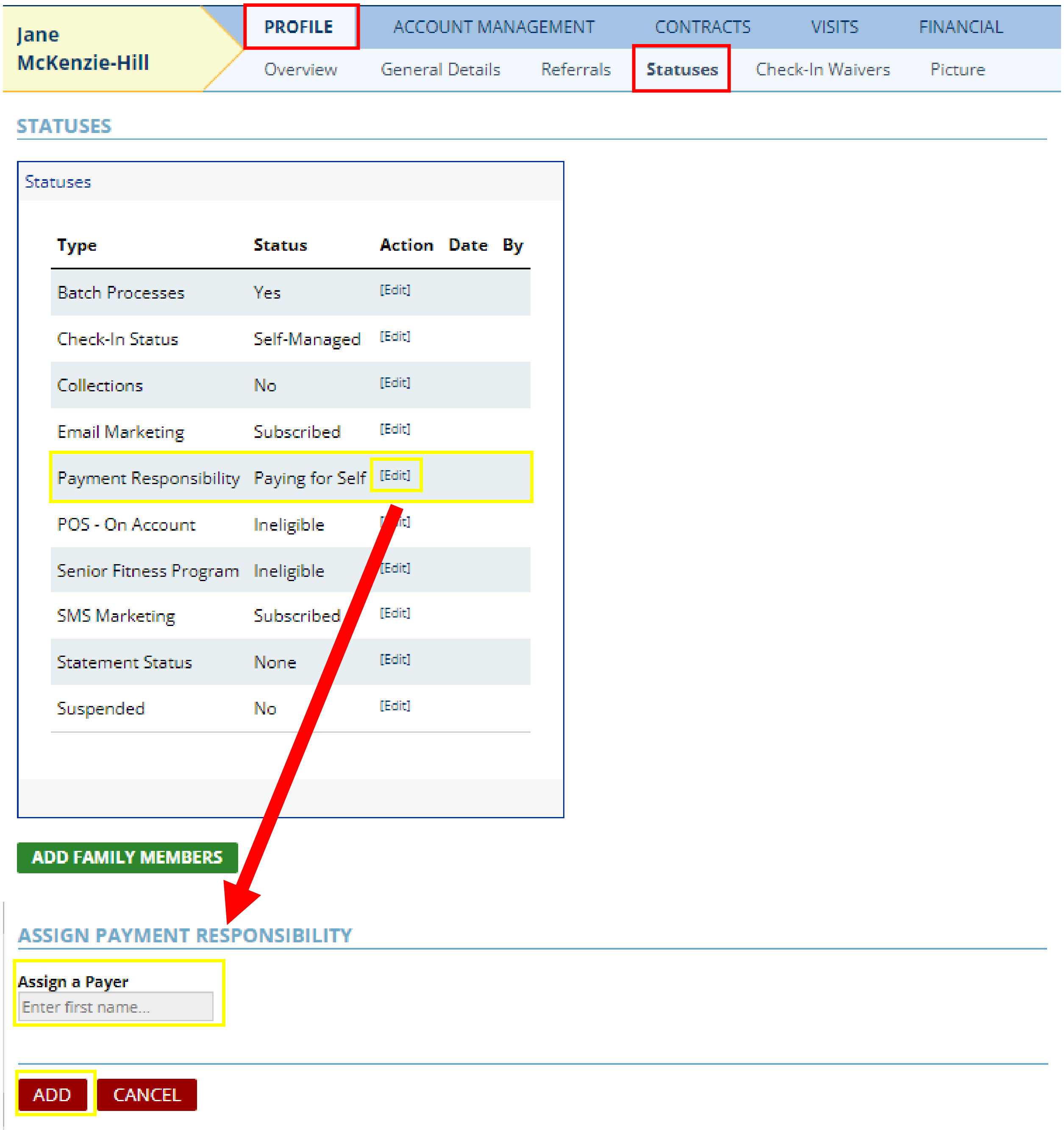




***NOTE**: If current client is <u>not paying</u> for the recurring charges for its family members then set **Payment Responsibility to Paying for Self**; if current client's membership <u>does not</u> cover the club/gym access for its family members then set **Check-In Status to Self-Managed**; if you want to copy current client's Team ID (i.e. payroll ID) to family members then set accordingly; if you want to copy current client's Group (i.e. corporate account) ) to family members then set accordingly; for each new family member being added, you must enter their First Name and Last Name; all other fields are optional*

# Adding Payment Responsibility

* If you know a client's payment responsibility when creating their new account, see Adding A New Client Account" Payment Responsibility" section as an alternative option for setting their payment responsibility or see Add Family Members steps for adding their new account

After selecting a client account, top menu: **PROFILE**>**Statuses**>[Edit] (in **Payment Responsibility** row)

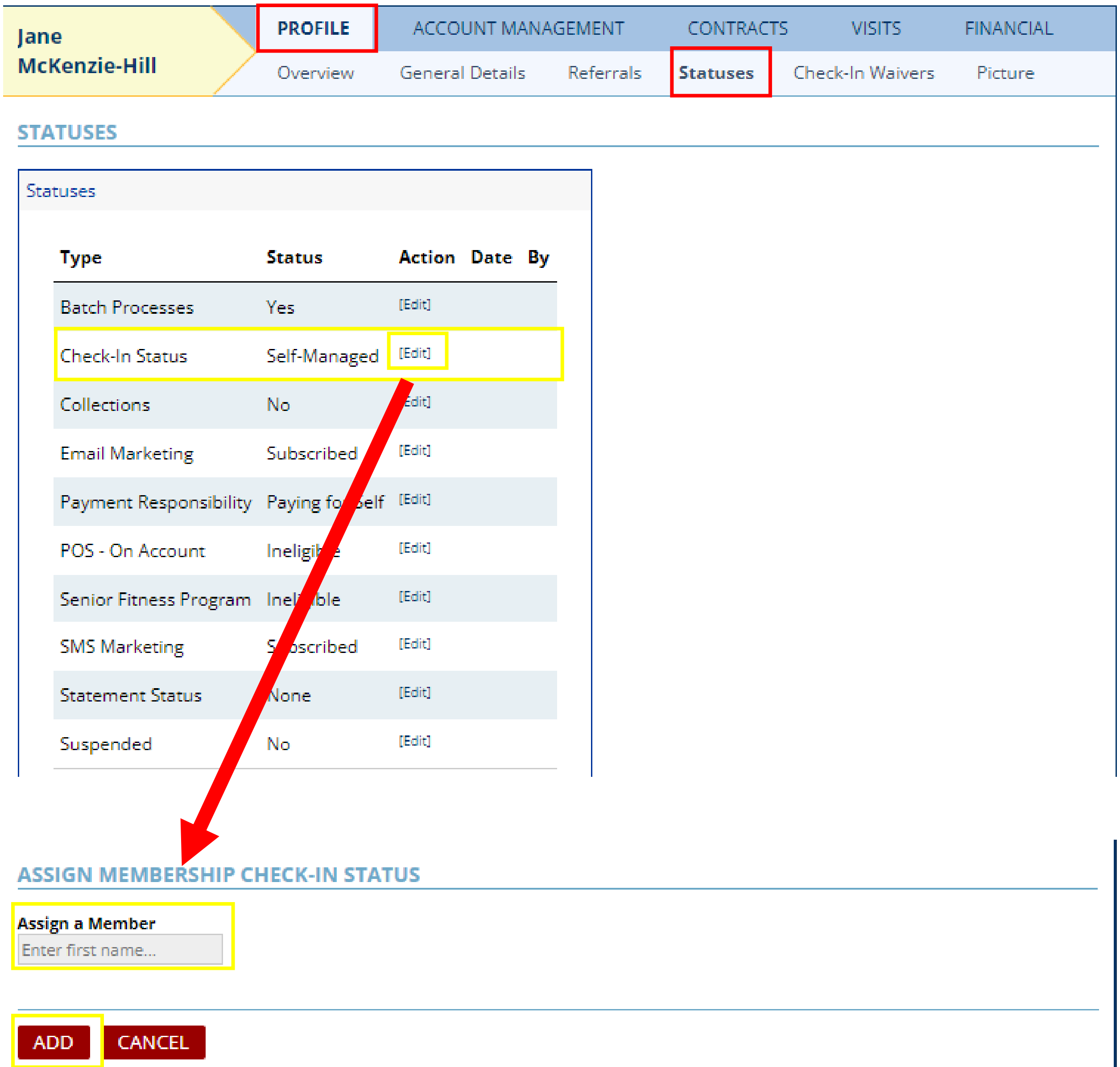



***NOTE**: In **Assign a Payment** field, enter first name of current client account that will be paying for their recurring charges*

# Adding Check-In Status

* If you know a client's check-in responsibility when creating their new account, see Adding A New Client Account "Check-In Status" section as an alternative option for setting their check-in status or see Add Family Members steps for adding their new account

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit](in **Check-In-Status** row)

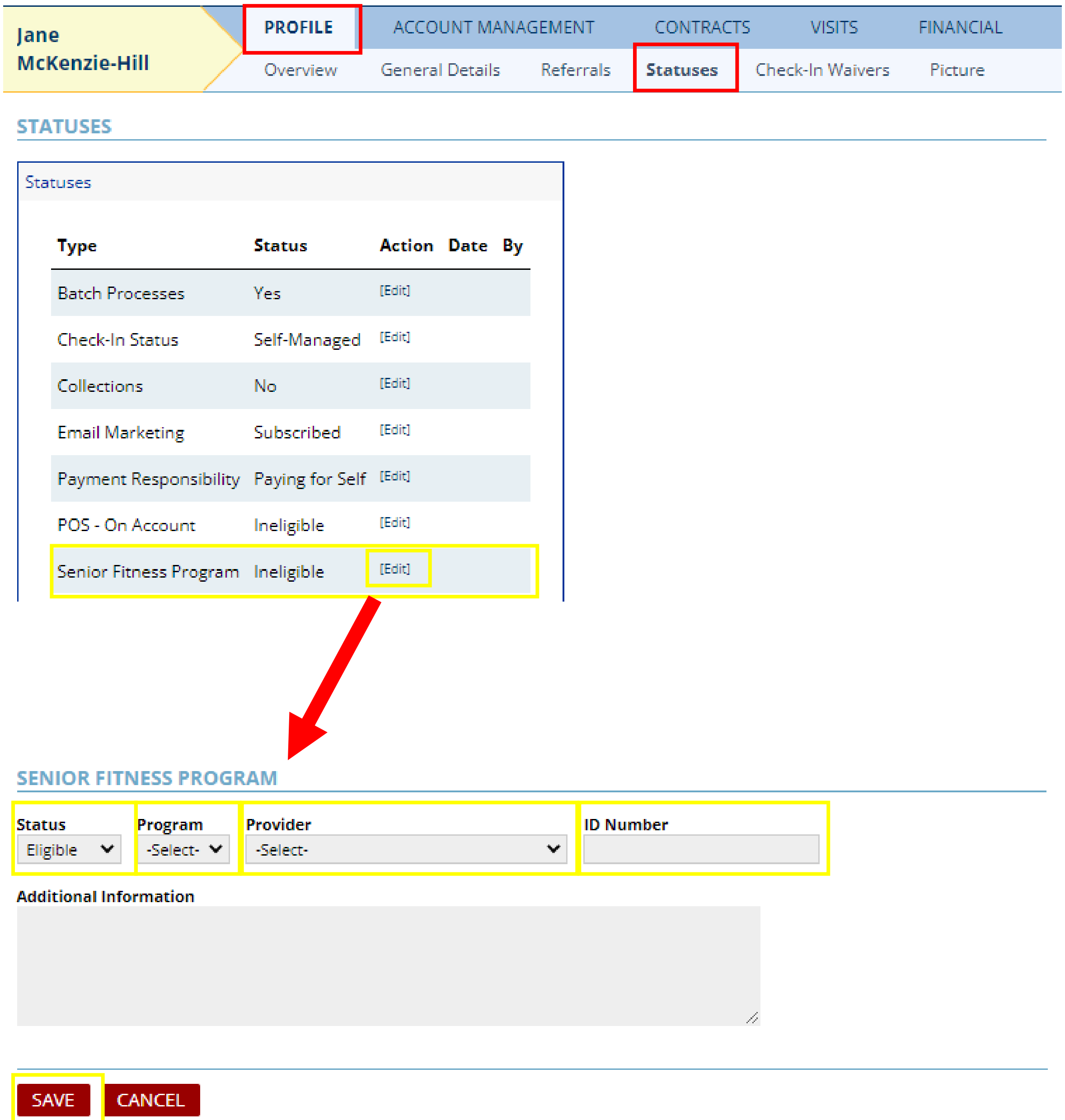



**NOTE**: in **Assign a Member** field, enter first name of current client account whose membership will provide their club/gym access

# Adding/Updating Senior Fitness Program Status (i.e. Insurance Program)

*** If you know the client's senior fitness program (i.e. Insurance Program) when creating their account, see [Adding A New Client Account](#) "Senior Fitness Programs" section**

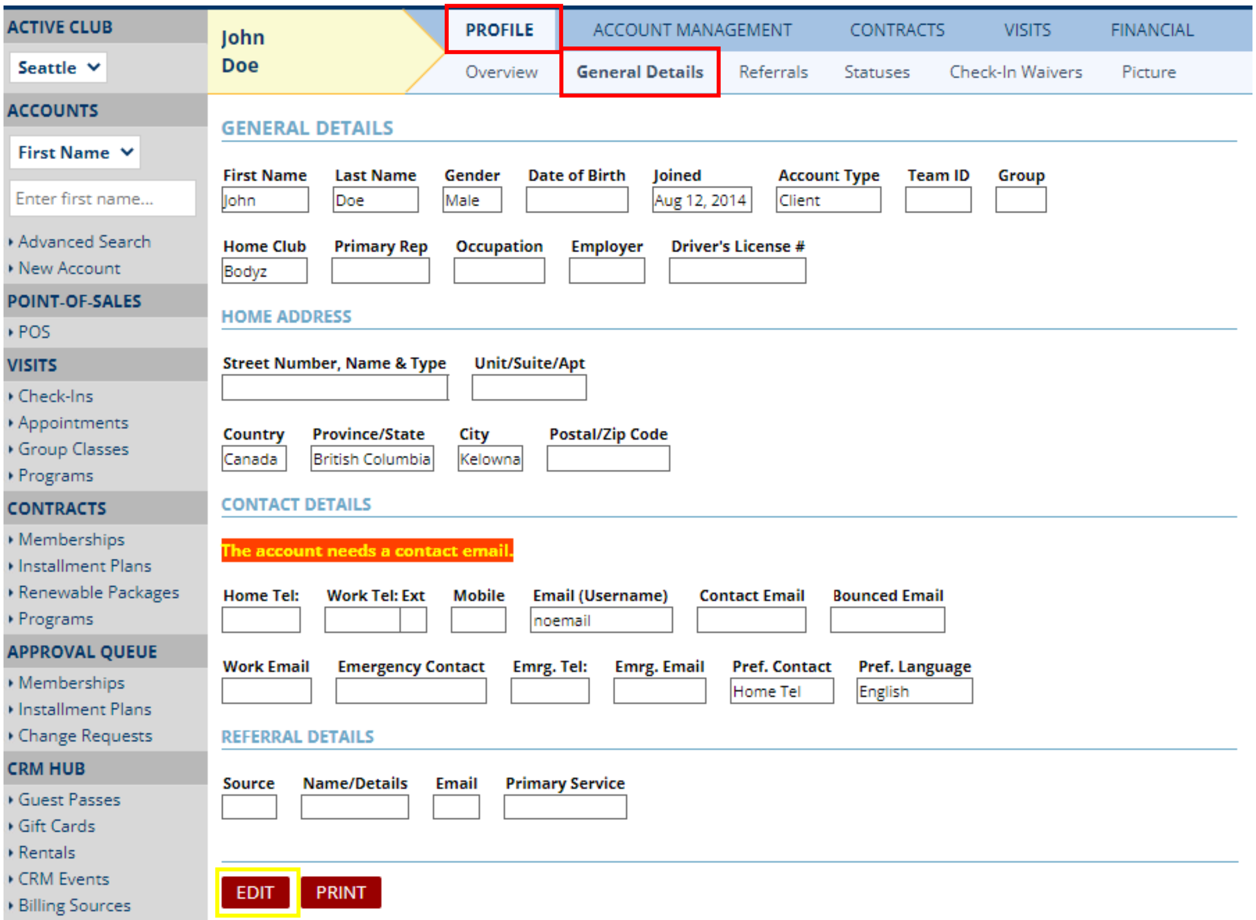
After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] (in **Senior Fitness Program** row)




***NOTE**: set **Status to Eligible** if client belongs to an Insurance Program, select **Program** and **Provider** (set Not Listed if provider not on list), enter **ID Number** (verify accuracy); set Status to Ineligible if client is no longer enrolled in the program*

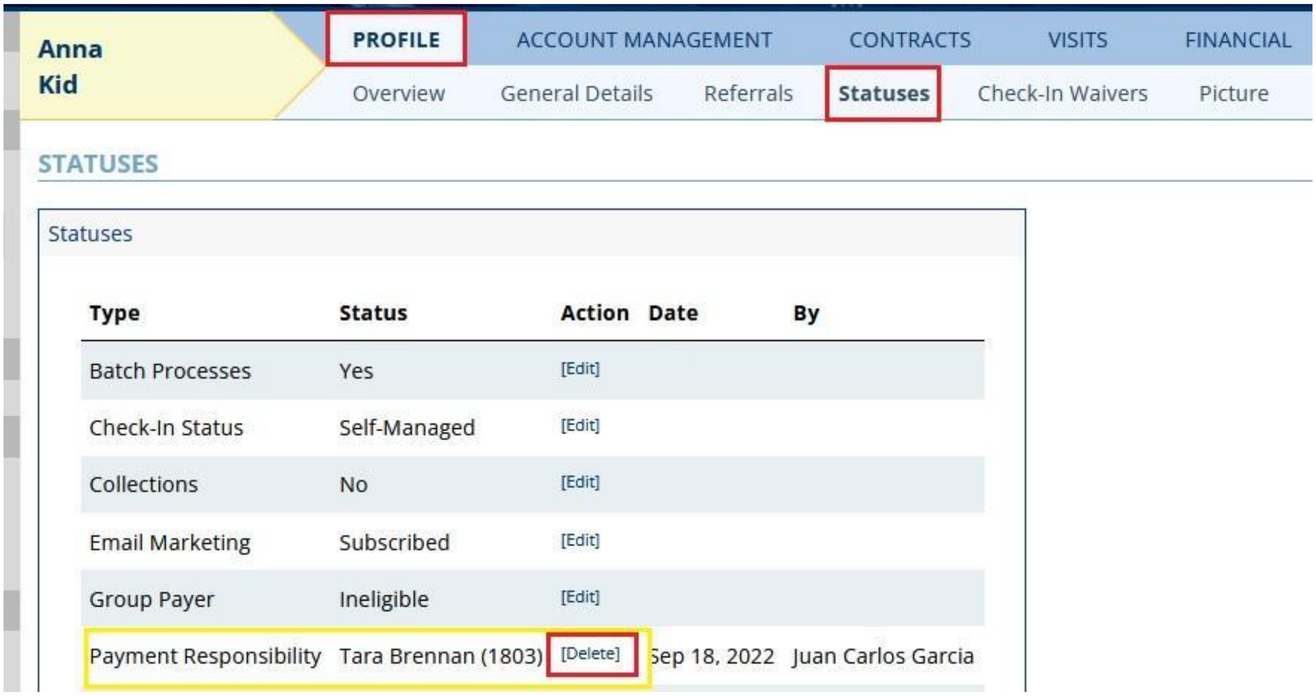
## Updating General Details (e.g. address, phone numbers, email)

After selecting a client account, top menu: **PROFILE** > **General Details** > **EDIT** > **SAVE** after making your updates



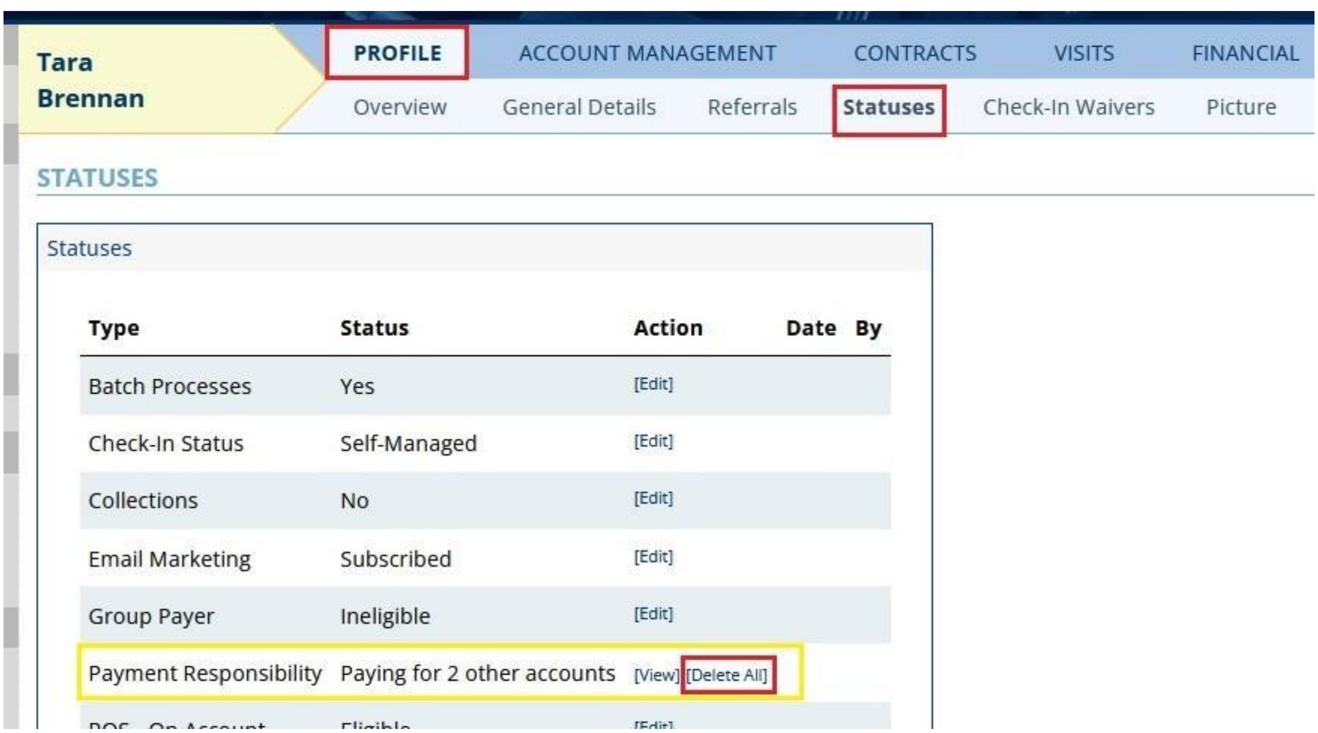
# Deleting Payment Responsibility

1. **For client account being paid for by another client** - after selecting a client account, top menu: **PROFILE**>**Statuses** > [Delete] (in **Payment Responsibility** row)



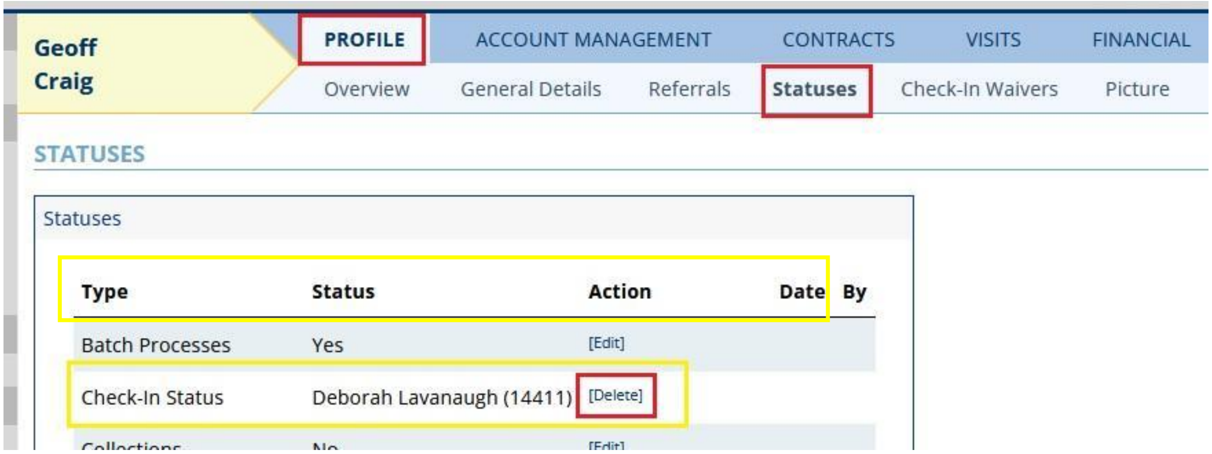

**OR**

2. **For client account paying for other clients** - after selecting a client account, top menu: **PROFILE** > **Statuses** > [Delete All] (in **Payment Responsibility** row)



## Deleting Check-In Status

1. **For client account whose check-in status is assigned to another client** - after selecting a client account, top menu: **PROFILE** > **Statuses** > **[Delete]** (in **Check-In Status** row)




**OR**

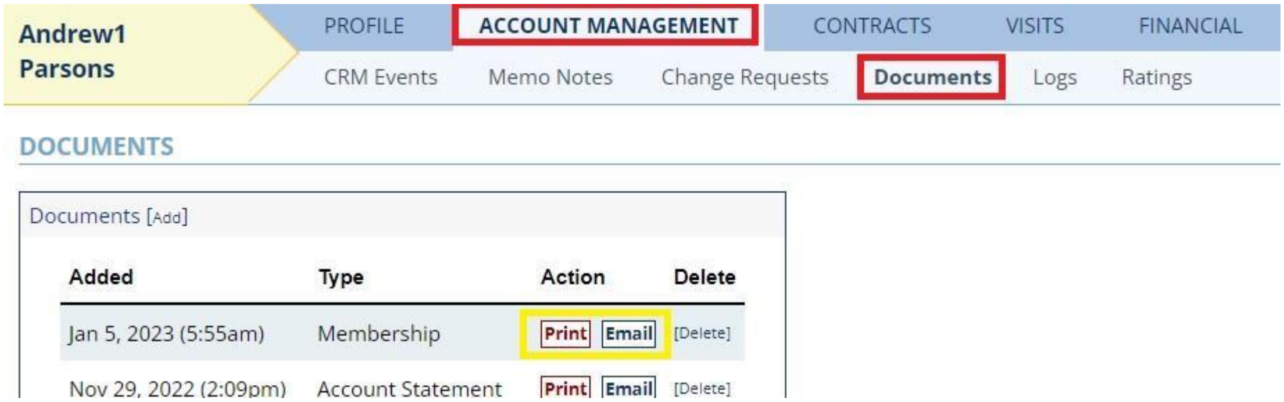
2. **For client account that provides check-in status for all clients** - after selecting a client account, top menu: **VISITS** > **Access** > [Delete All] (to delete all clients) **or** [Del.] (to delete a specific client)


**OR**

3. **For client account that provides check-in status for all clients** - after selecting a client account, top menu: **CONTRACTS** > **Memberships** > [Delete All] (to delete all clients) **or** [Del.] (to delete a specific client)

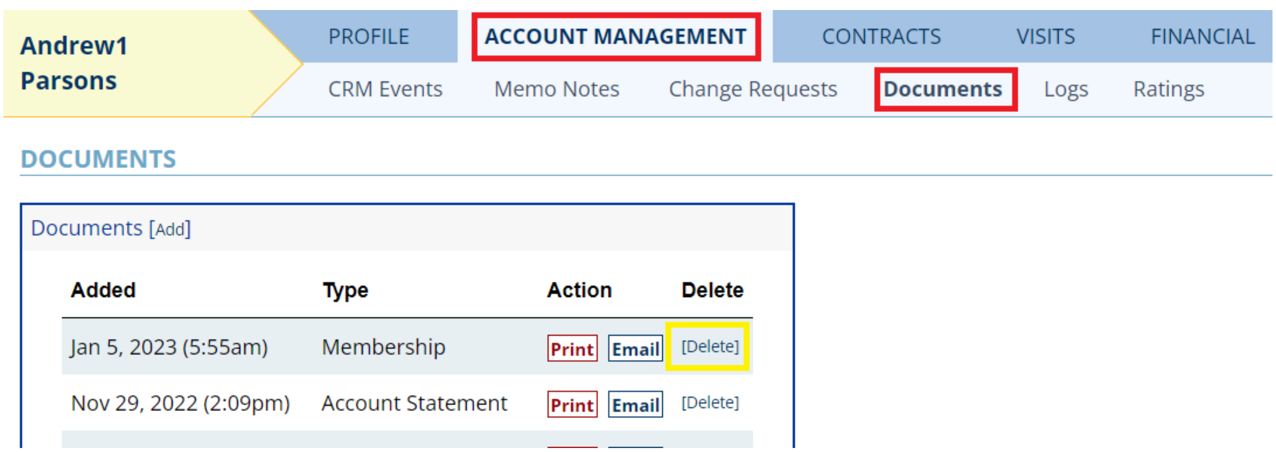
# Viewing/Emailing Client Document

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Documents** > **[Print]** (to view document) **or [Email]** (to email document)



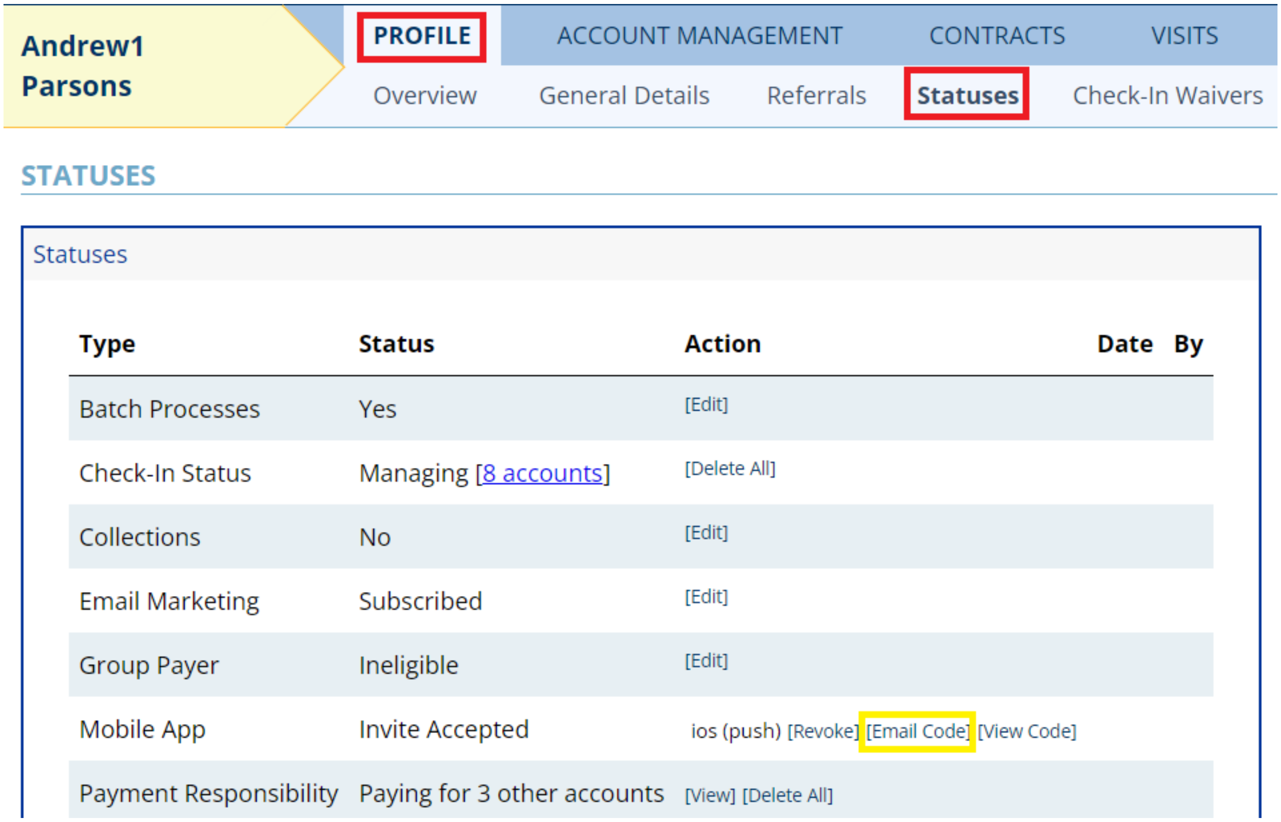

# Deleting Client Document

After selecting a client account, top menu: **ACCOUNT MANAGEMENT** > **Documents** > [Delete]



# Emailing Mobile App Code

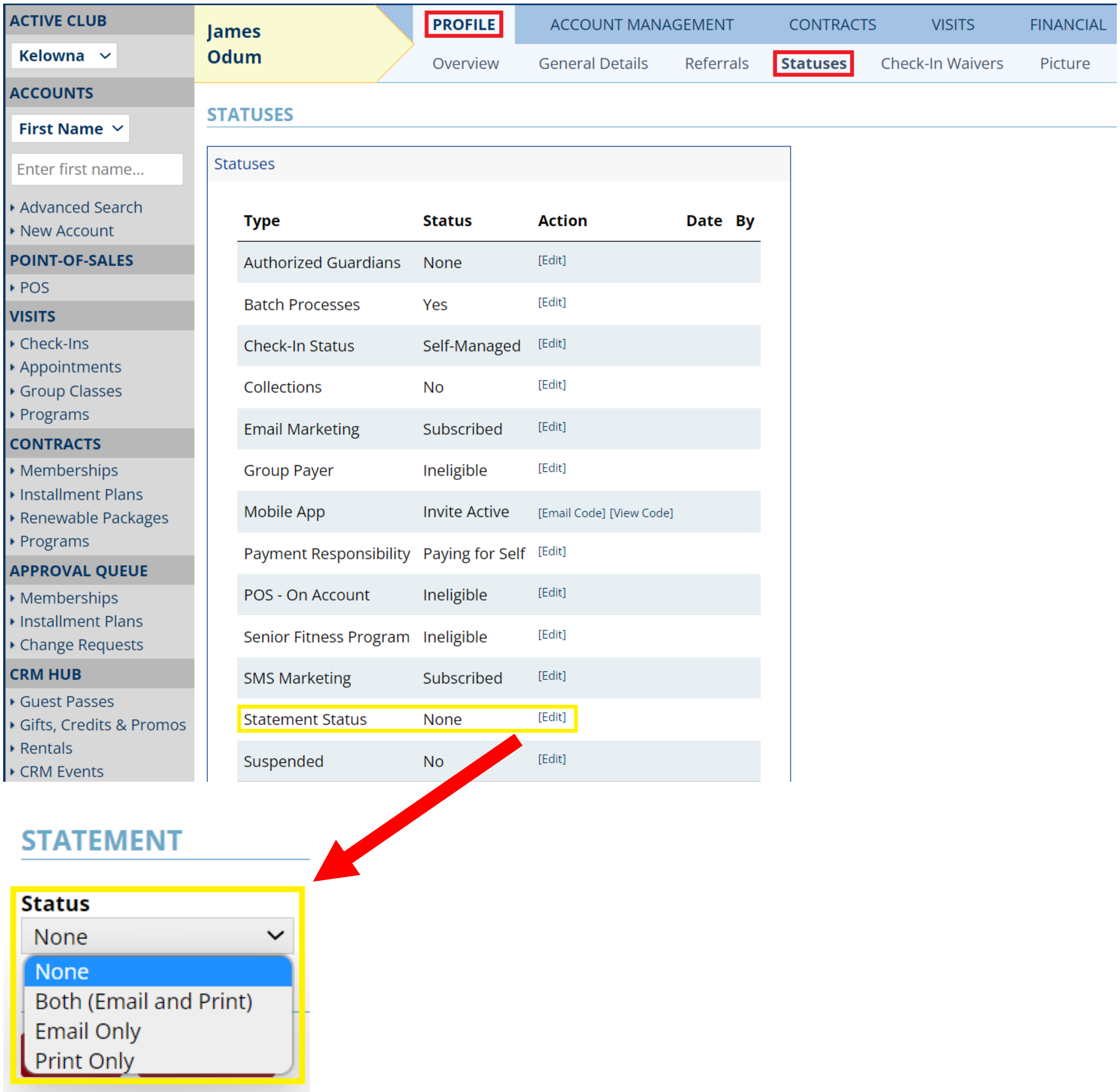
After selecting a client account, top menu: **PROFILE** > **Statuses** > **[Email Code]** (in **Mobile App** row)




| Type | Status | Action | Date | By |
|---|---|---|---|---|
| Batch Processes | Yes | [Edit] | | |
| Check-In Status | Managing [8 accounts] | [Delete All] | | |
| Collections | No | [Edit] | | |
| Email Marketing | Subscribed | [Edit] | | |
| Group Payer | Ineligible | [Edit] | | |
| Mobile App | Invite Accepted | ios (push) [Revoke] [Email Code] [View Code] | | |
| Payment Responsibility | Paying for 3 other accounts | [View] [Delete All] | | |

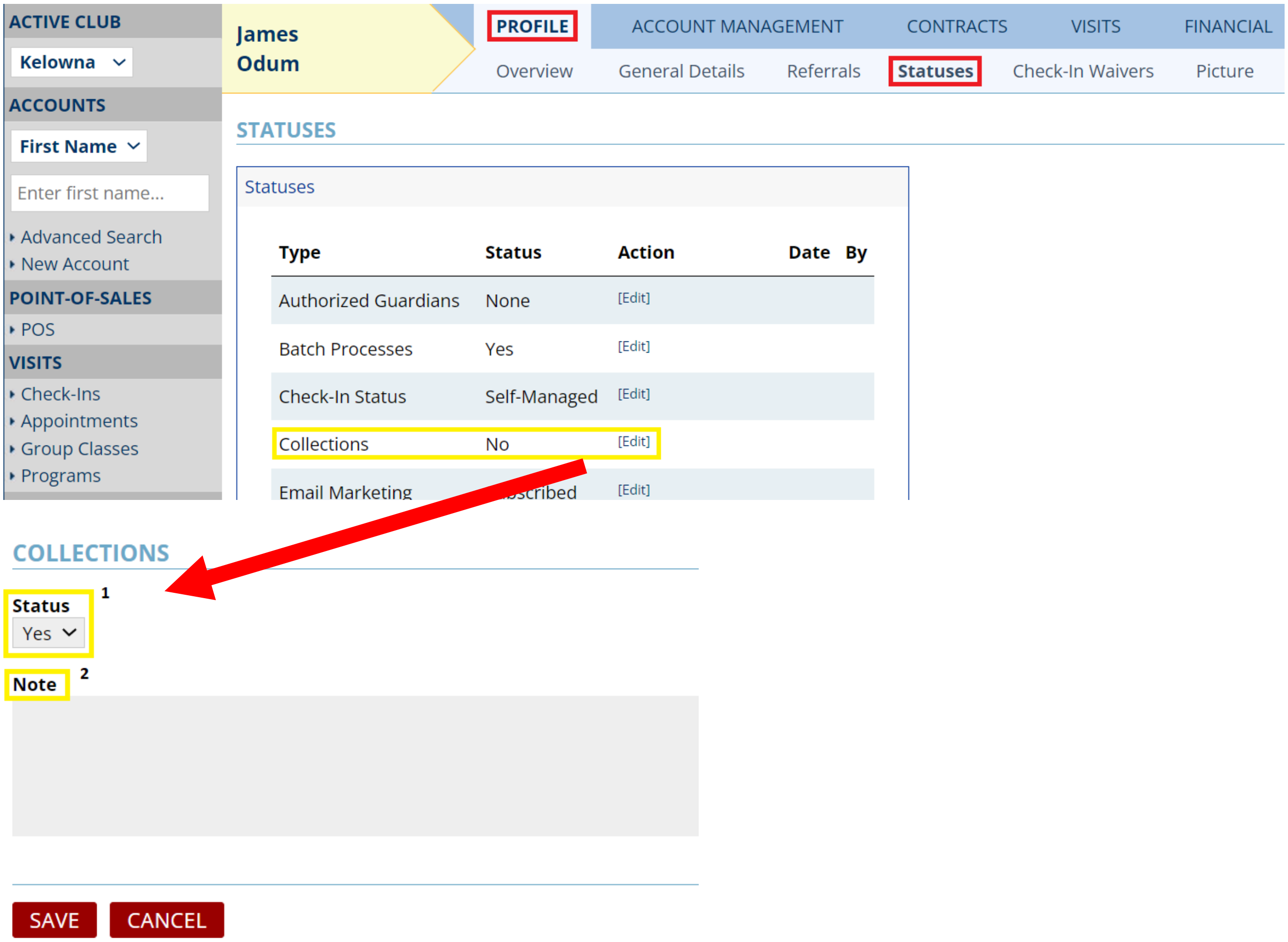
# Updating Statement Status

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] (in **Statement Status** row) > Update the Statement Status > **SAVE**



# Updating Collection Status

After selecting a client account, top menu: **PROFILE** > **Statuses** > [Edit] (in **Collection Row** row)




## KEY FIELDS

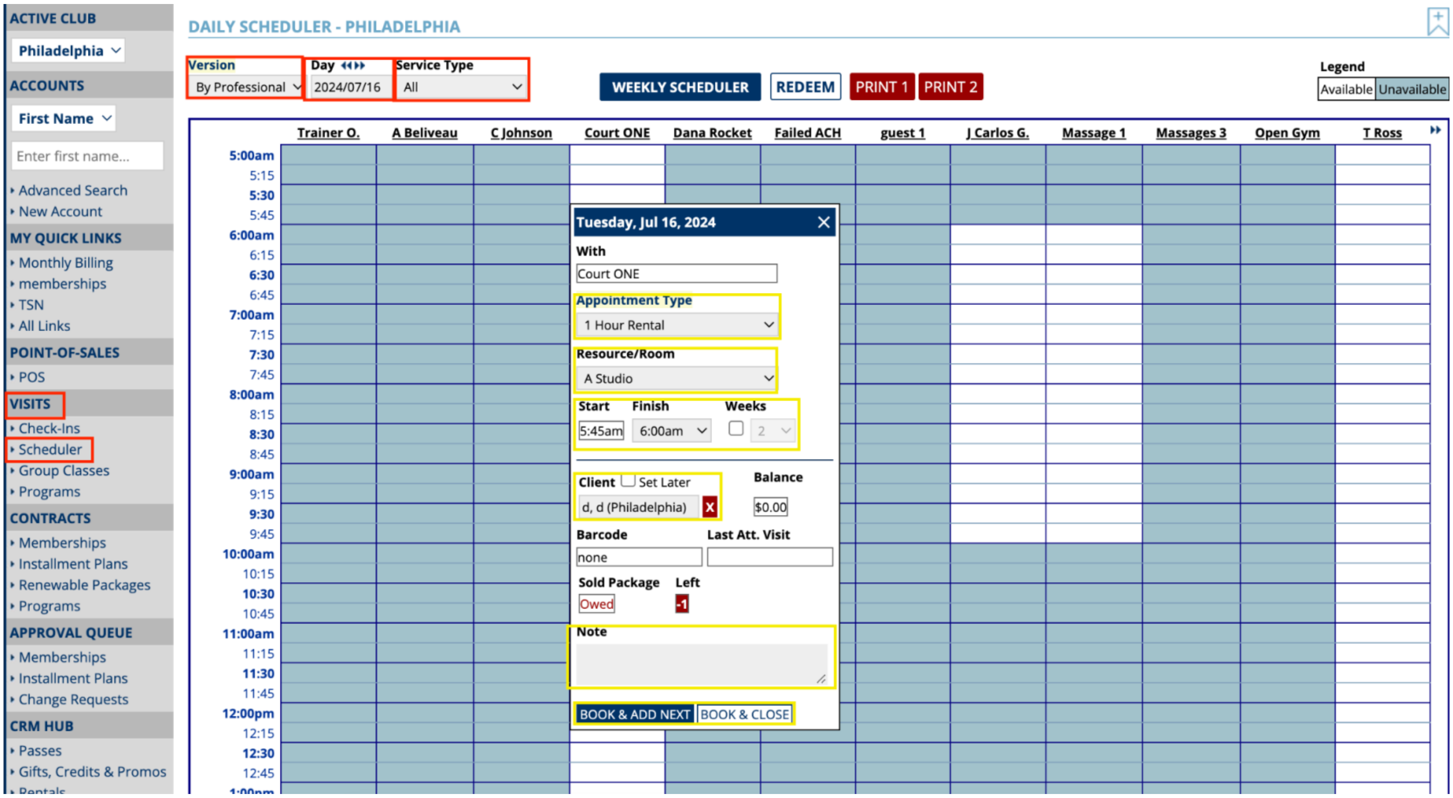
1. **Status**: Update Collection Status to Yes or No
2. **Note:** If applicable, provide notes for the Collections

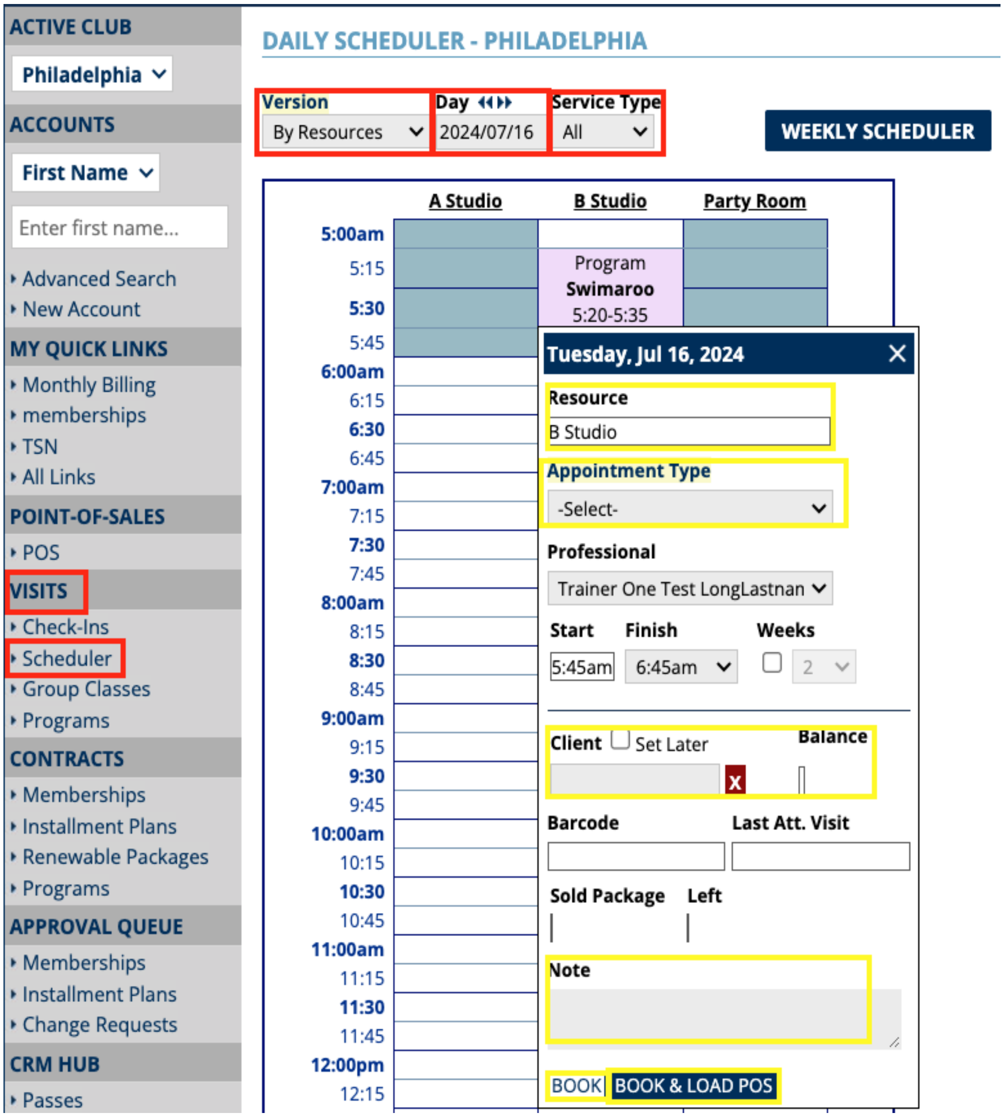
**SAVE**

# Booking Appointments (Daily Scheduler)

* Booking Appointments may be done in a daily view or weekly view> See Booking Appointments (Weekly Scheduler)

Left-side menu: **VISITS > Scheduler** > Select Version (By Professional or By Resource) > Day of appointment > narrow field by selecting service type > click into open white slot for appointment under appropriate Staff or Resource column



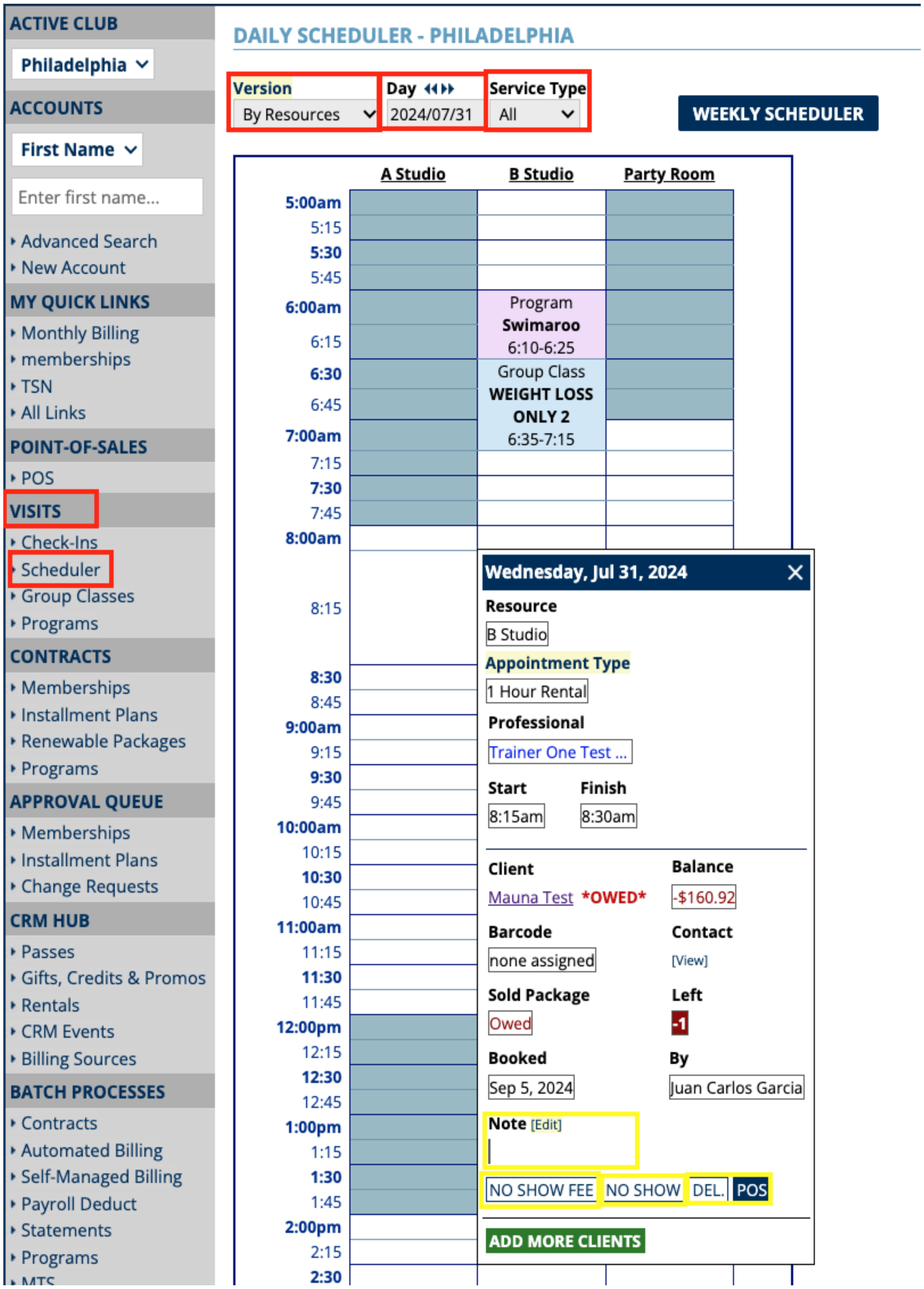



**KEY FIELDS**

1. **Version:** Select to view scheduler by Resource/Room or Professional/Staff
2. **Appointment Type**: Select applicable appointment type
3. **Resource/Room:** If applicable, Select Resource/Room
4. **Start/Finish/Weeks**: Confirm appointment start and finish times. Adjust finish time, if needed
   - If appointment is recurring each week (same day and time), check box and select the # of weeks. The system will automatically save the appointments for the following weeks
5. **Client**: Enter client's name (by last name) > confirm accuracy Balance, Barcode, Last Att. Visit, Sold Package and Left fields will auto-populate **OR** Select **Set later** to enter the client at a later date.
   - see Alert: Eligible Packages note for possible package already purchased
6. **Note**: Add all relevant notes in the 'Note' field, if applicable
7. **BOOK:** Click to book appointment only **or BOOK & LOAD POS** – to book if you need to charge the client. You will be redirected to the POS page

# Updating Past Appointments (Daily Scheduler)

Left-side menu: **VISITS** > **Scheduler**

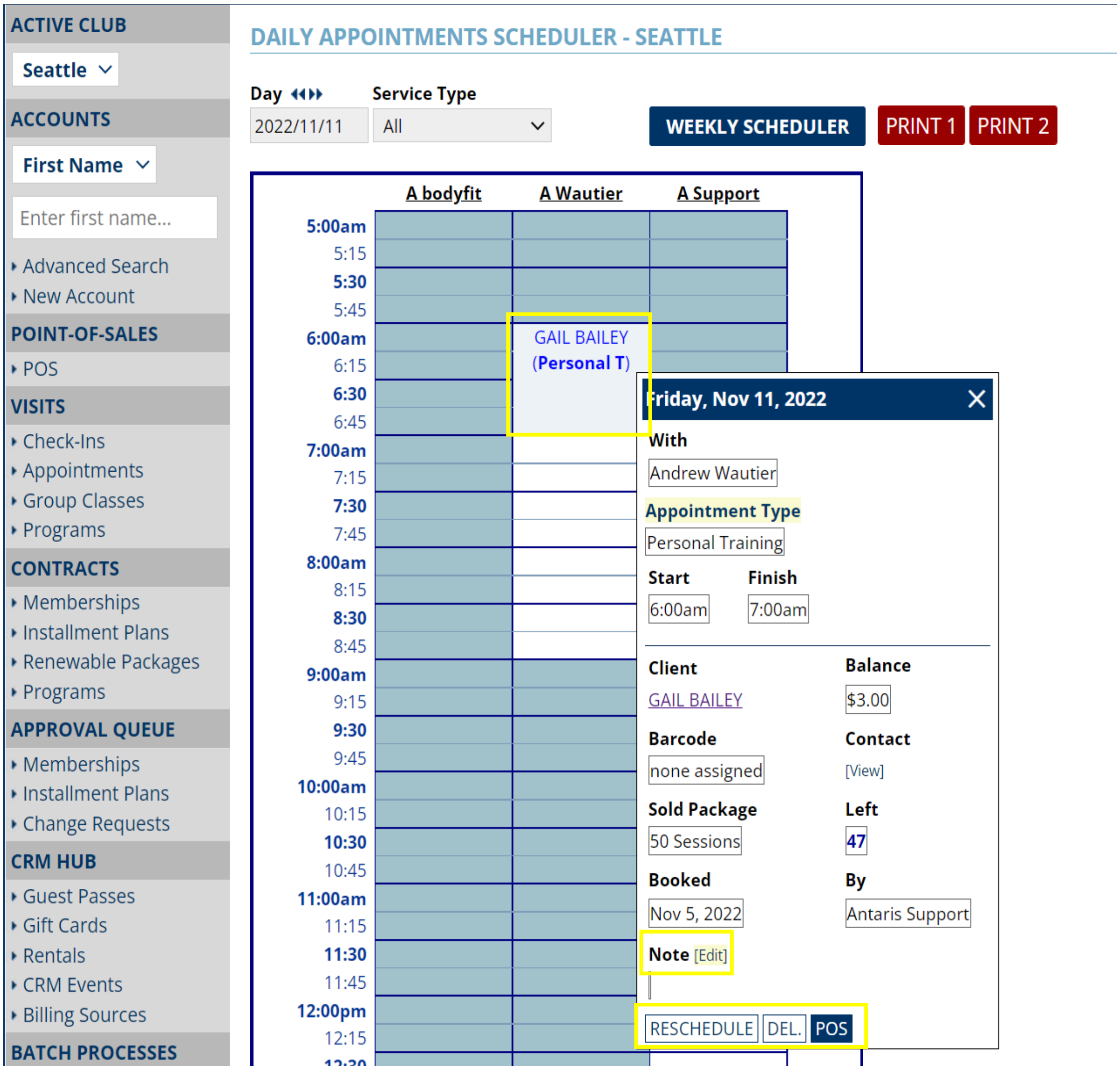


**KEY FIELDS**

1. **Version**: Select to view scheduler by Resource/Room or Professional/Staff
2. Find and click on the appointment
3. **Note**: Click [Edit] if you want to add a note > SAVE
4. **NO SHOW FEE**: Select if you are charging the client (1 session will be deducted from the package)
   **NO SHOW**: Select if you are not charging the client (1 session will be added back to the package)
   **DEL**: Select if you are deleting the appointment (deleted appointments cannot be retrieved)
   **POS:** Select if you need to charge the client (i.e. client does not have a package and you are charging a no show fee). You will be redirected to the POS page (see "Adding Point of Sale (POS) Purchase")

# Updating Future Appointments (Daily Scheduler)

Left-side menu: **VISITS** > **Scheduler**



## KEY FIELDS

1. Find and click on the appointment
2. **Note**: Click [Edit] if you want to add a note > SAVE
3. **RESCHEDULE**: Select if you are rescheduling the appointment on a different day and/or time. Then go to the new date, click on the time slot. All info will be copied over >BOOK

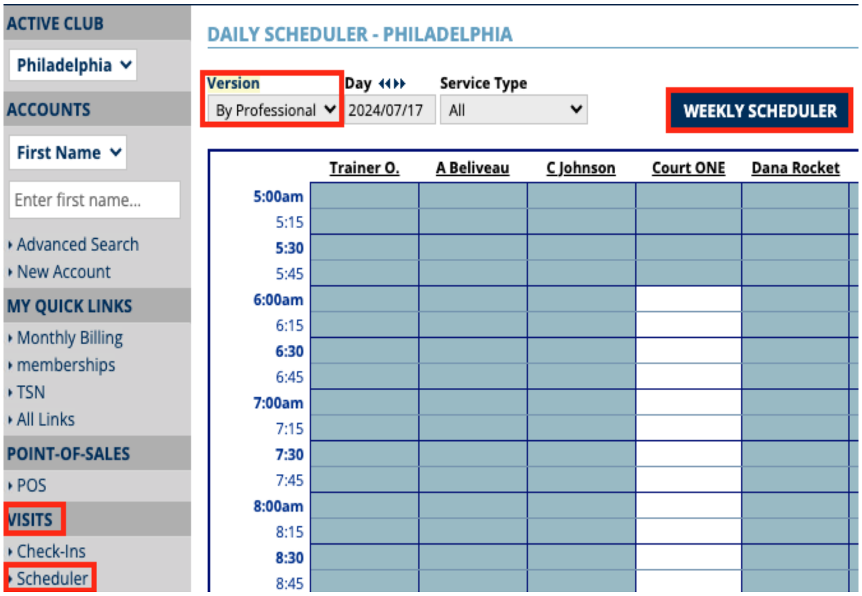
   **DEL**: Select if you are deleting the appointment (deleted appointments cannot be retrieved)

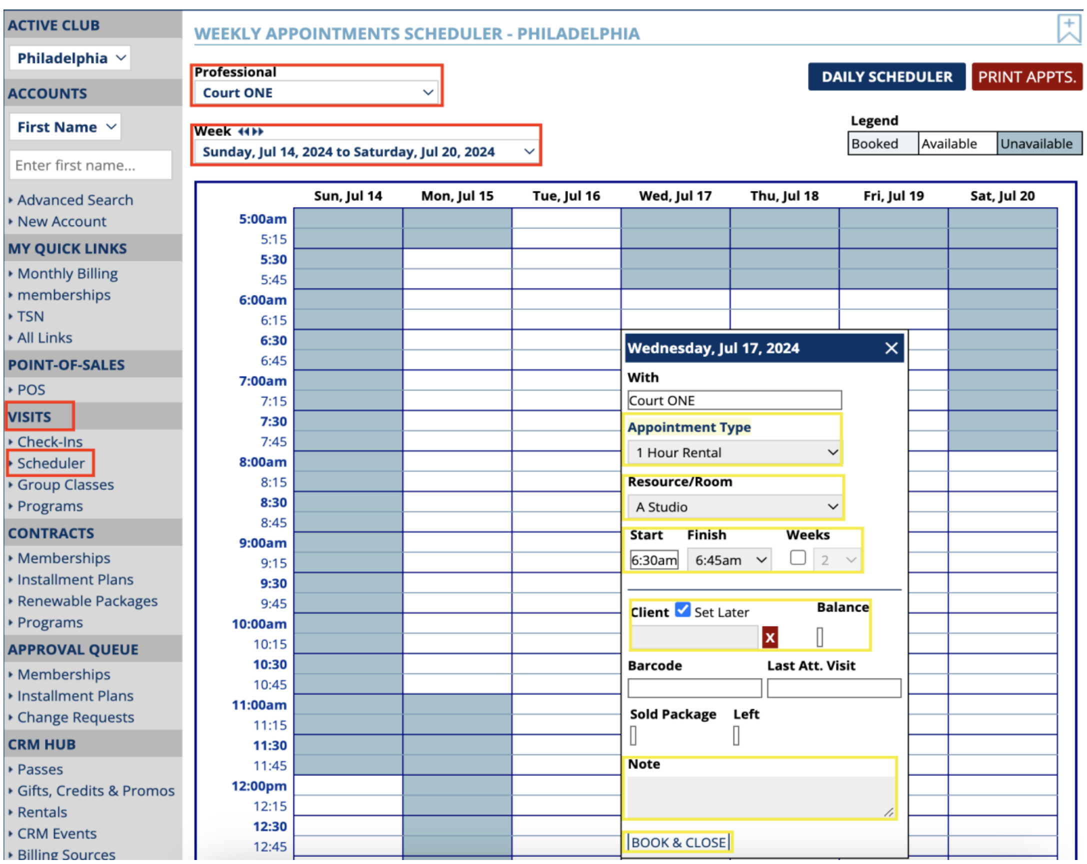
   **POS:** Select if you need to charge the client. You will be redirected to the POS page (see "Adding Point of Sale (POS) Purchase")

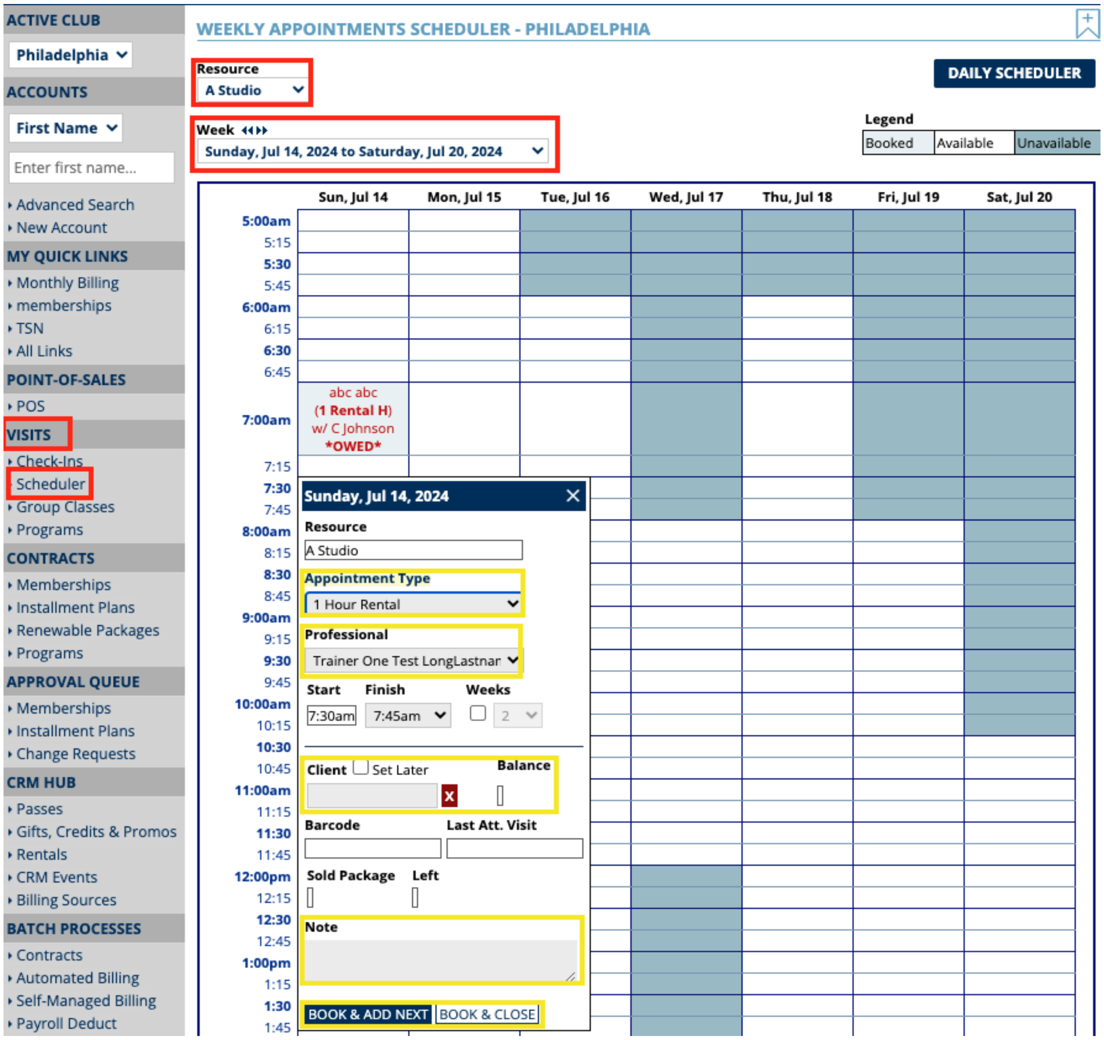
# Booking Appointments (Weekly Scheduler)

*** Booking Appointments may be done in a daily view or weekly view > See [Booking Appointments (Daily Scheduler)]**

Left-side menu: **VISITS** > **Scheduler** > **Version** > **WEEKLY SCHEDULER**



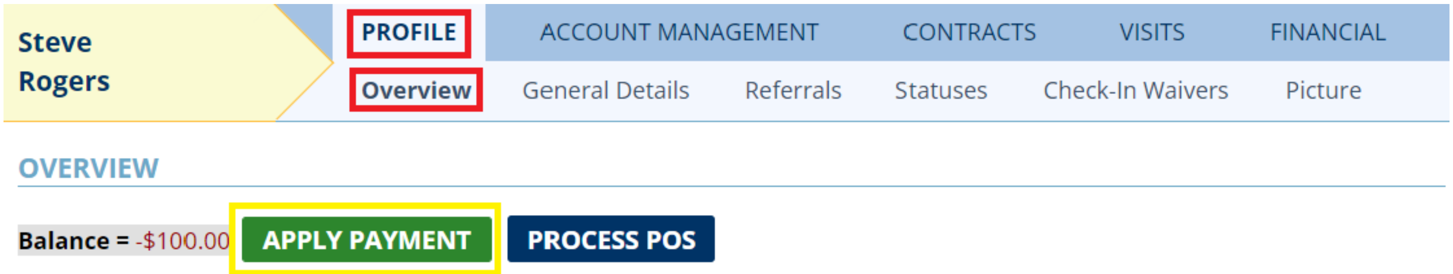



**KEY FIELDS**

1. **Version:** Select to view scheduler by Resource/Room or Professional/Staff
2. **Appointment Type**: Select applicable appointment type
3. **Resource/Room:** If applicable, Select Resource/Room
4. **Start/Finish/Weeks**: Confirm appointment start and finish times. Adjust finish time, if needed
   - If appointment is recurring each week (same day and time), check box and select the # of weeks. The system will automatically save the appointments for the following weeks
5. **Client**: Enter client's name (by last name) > confirm accuracy Balance, Barcode, Last Att. Visit, Sold Package and Left fields will auto-populate
   - see Alert: Eligible Packages note for possible package already purchased
6. **Note**: Add all relevant notes in the 'Note' field, if applicable
7. **BOOK:** Click to book appointment only **or BOOK & LOAD POS** – to book if you need to charge the client. You will be redirected to the POS page

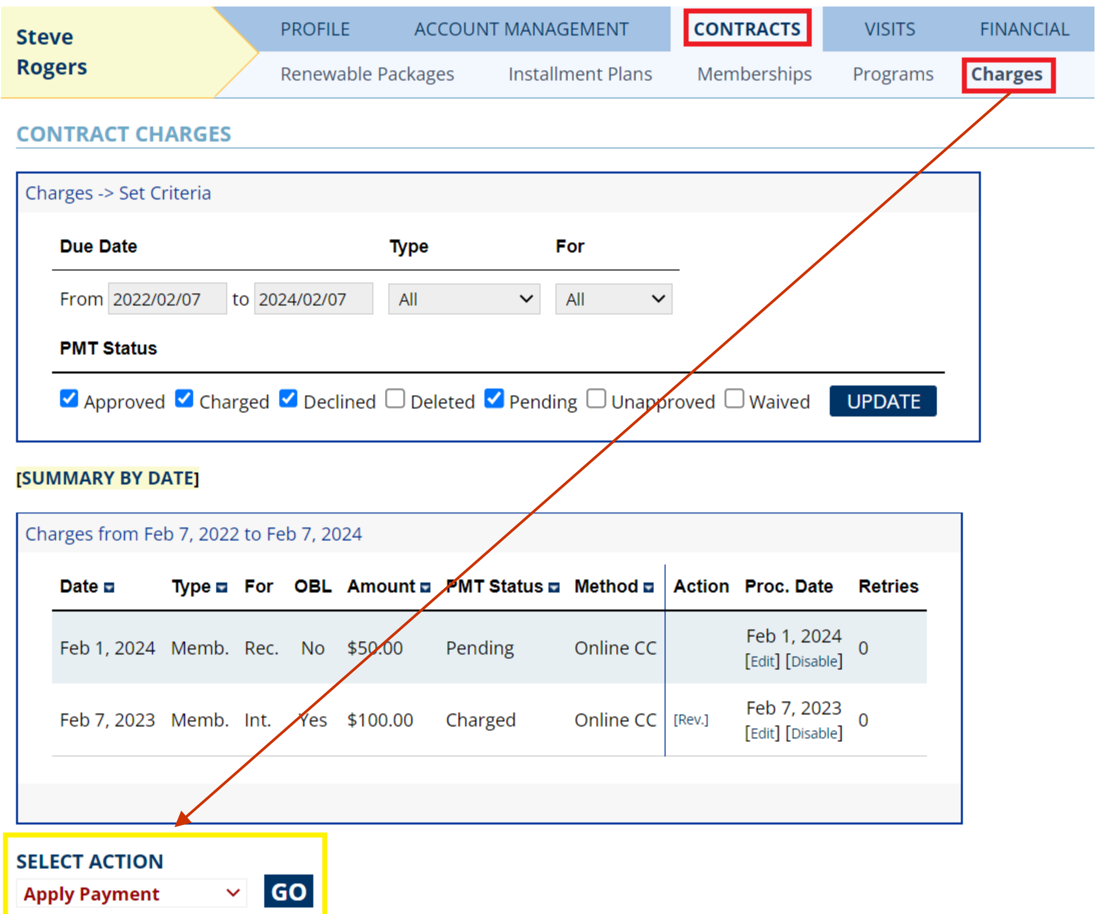
# Applying Payment to Current Balance

After selecting a client account, top menu: **PROFILE** > **Overview** > **APPLY PAYMENT**



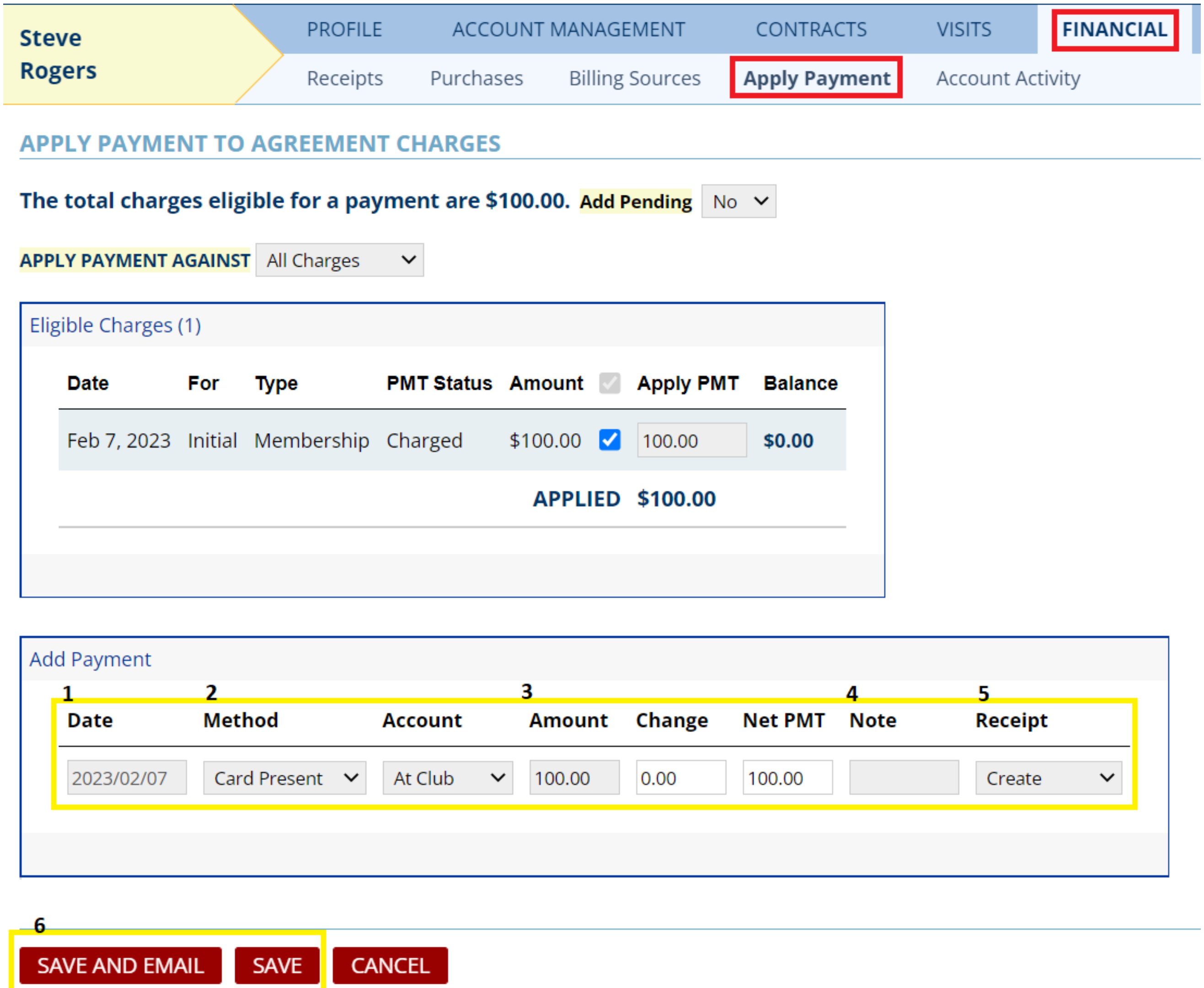

**OR**

After selecting a client account, top menu: **CONTRACTS** > **Charges** > **SELECT ACTION** > Apply Payment



**OR**

After selecting a client account, top menu: **FINANCIAL** > **Apply Payment**

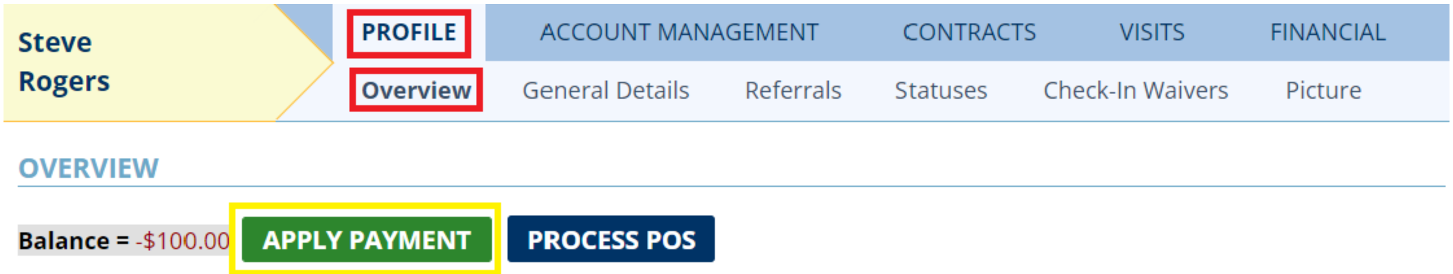



## KEY FIELDS

1. **Date:** Date of Payment
2. **Method:** Select Payment Method
3. **Amount:** Verify Payment Amount
4. **Note:** If applicable, make a note for the transaction
5. **Receipt:** Select correct "Create & Print" option for your printer
6. **SAVE AND EMAIL** if client wants a copy emailed or **SAVE**

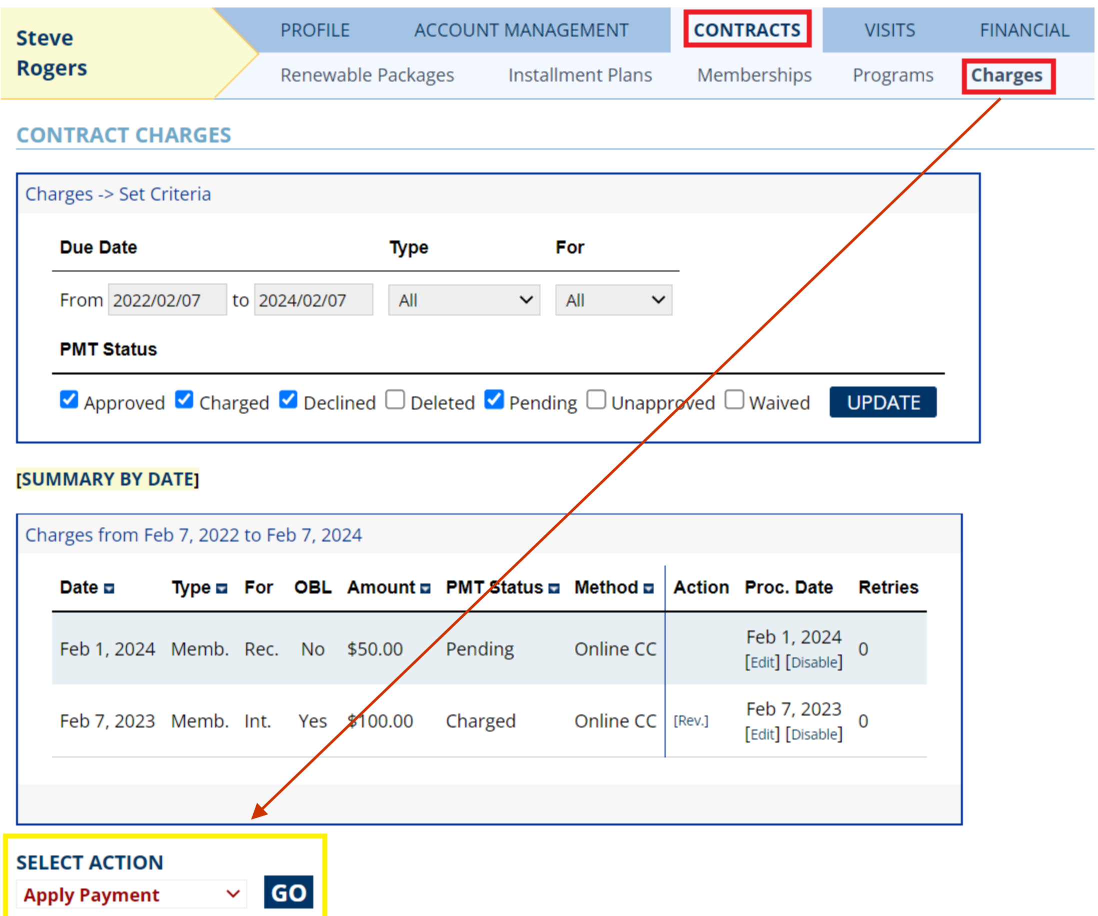
# Applying Partial Payments

1. After selecting a client account, top menu: **PROFILE** > **Overview** > **APPLY PAYMENT**



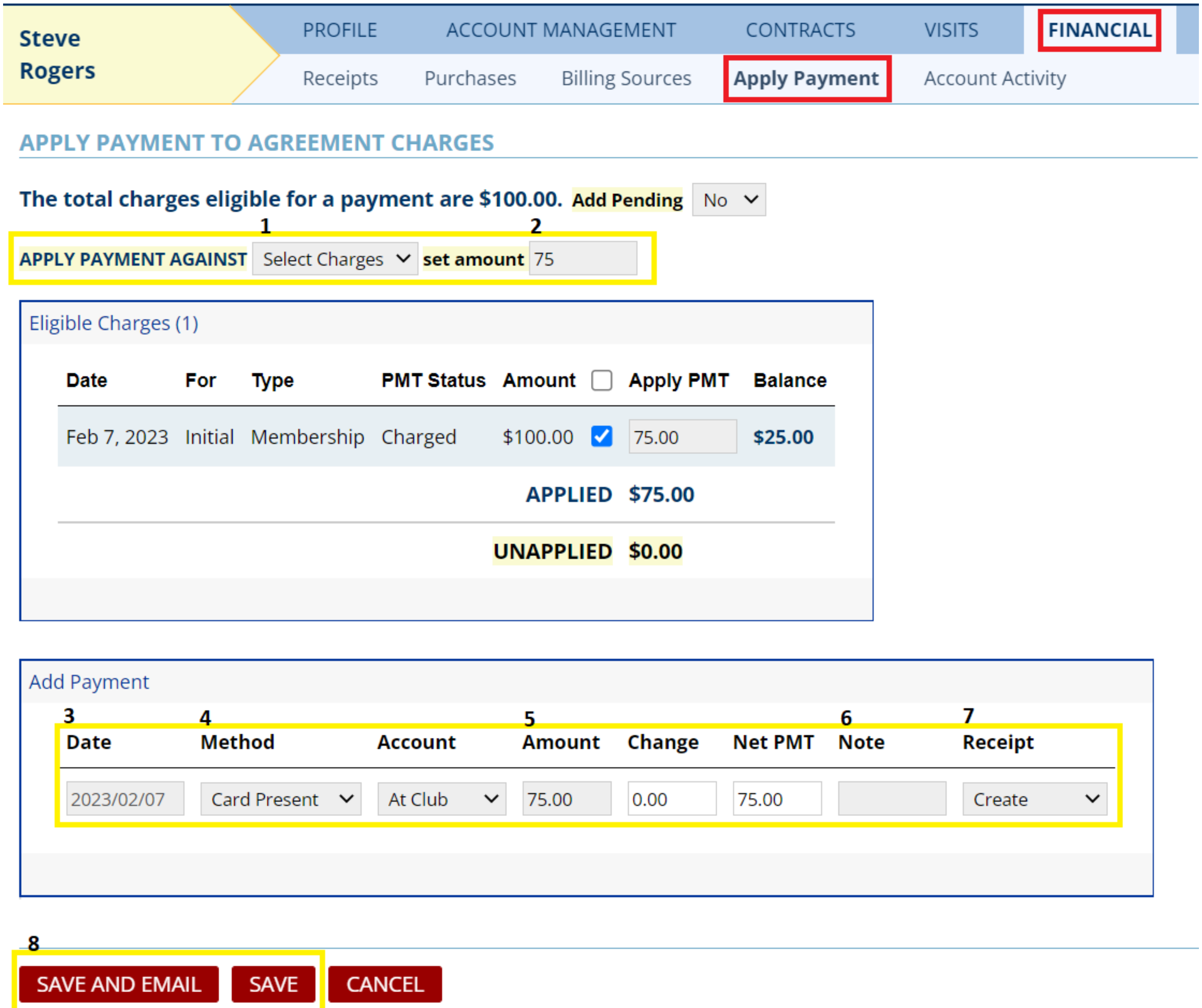

**OR**

2. After selecting a client account, top menu: **CONTRACTS**>**Charges**>**SELECT ACTION**>Apply Payment



**OR**

3. After selecting a client account, top menu: **FINANCIAL** > **Apply Payment**

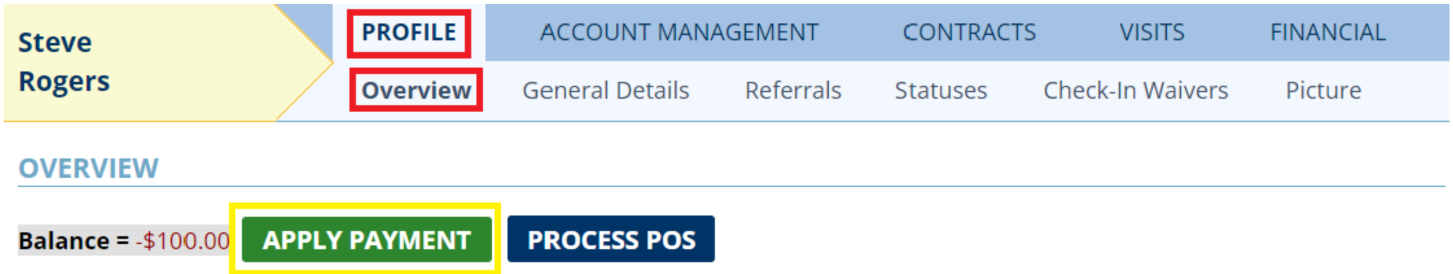



**KEY FIELDS**

1. **Apply Payment Against:** Change to Select Charges
2. **Set Amount:** Set amount for partial payment amount
3. **Date:** Date of Payment
4. **Method:** Select Payment Method
5. **Amount:** Verify Payment Amount
6. **Note:** If applicable, make a note of the transaction
7. **Receipt:** Select correct "Create & Print" option for your printer
8. **SAVE AND EMAIL** or **SAVE**

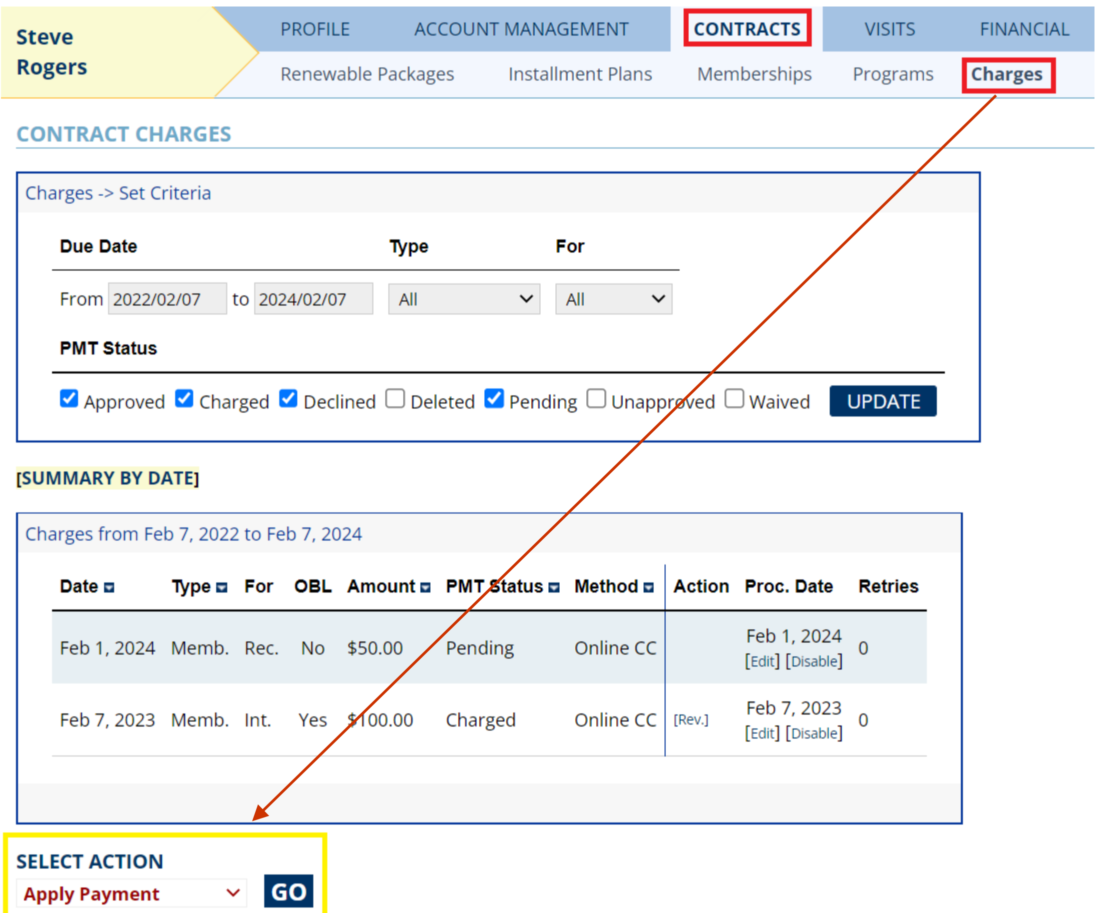
# Applying Payment to Future Charges

4. After selecting a client account, top menu: **PROFILE** > **Overview** > **APPLY PAYMENT**



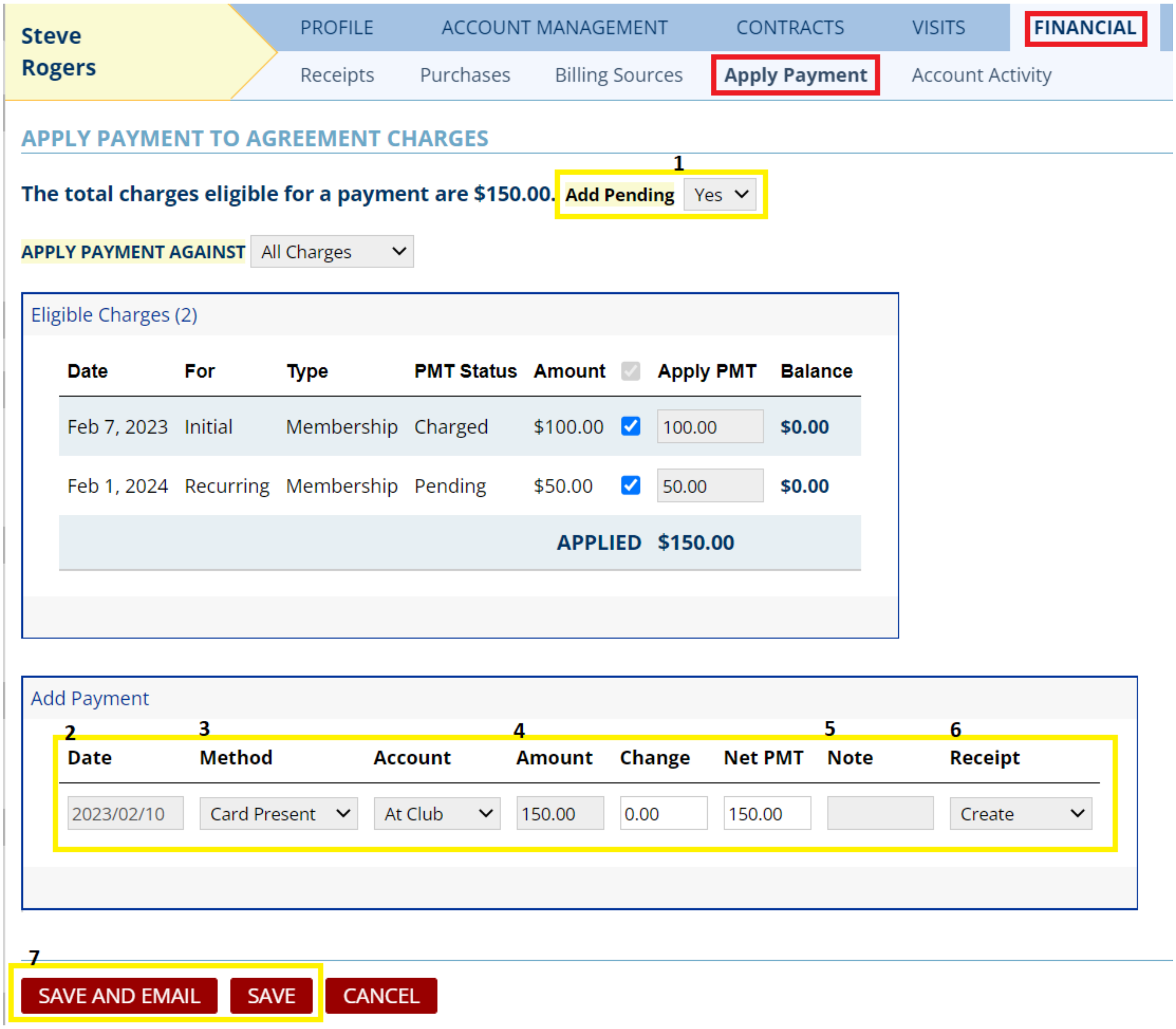

**OR**

5. After selecting a client account, top menu: **CONTRACTS**>**Charges**>**SELECT ACTION**> Apply Payment



**OR**

1. After selecting a client account, top menu: **FINANCIAL** > **Apply Payment**



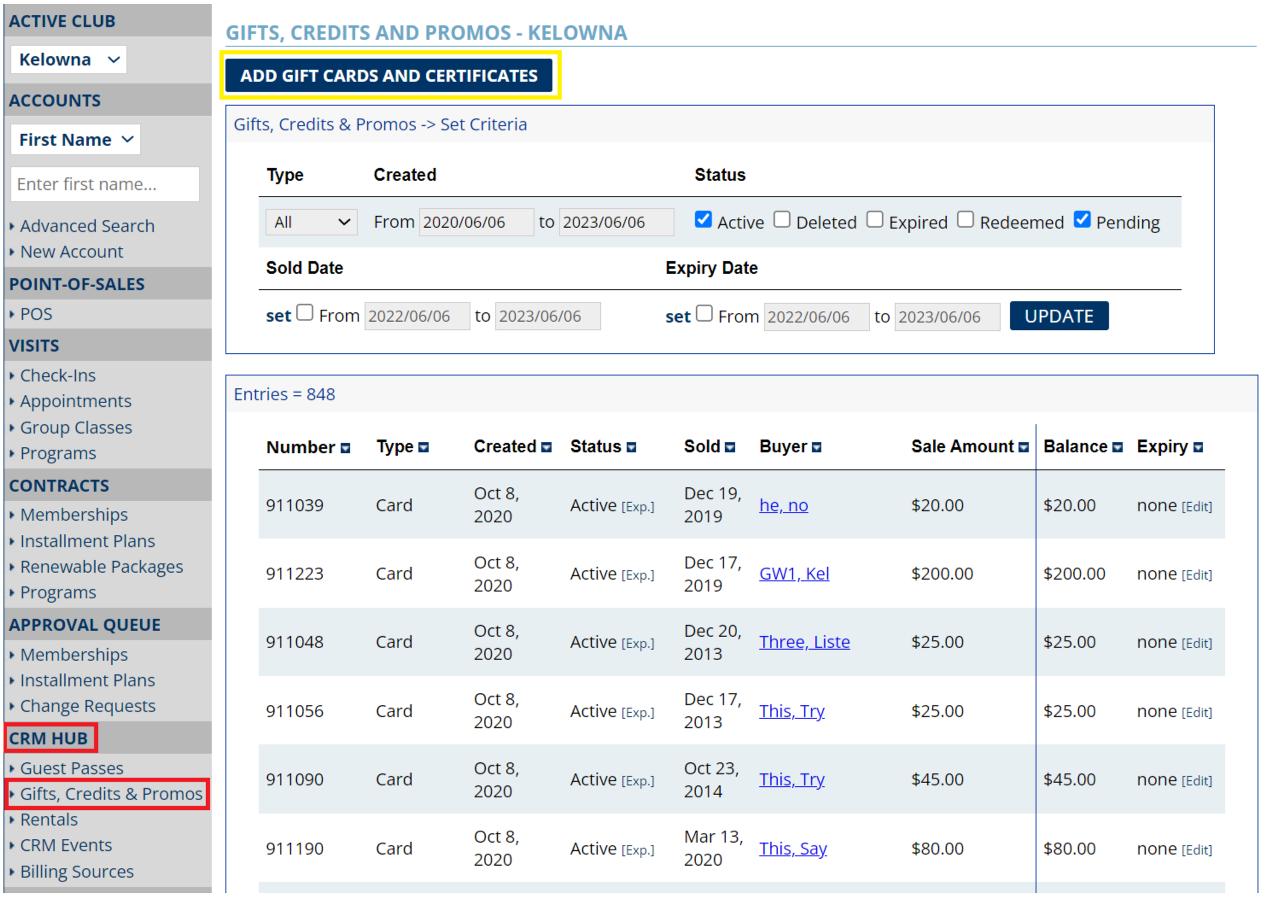

**KEY FIELDS**

1. **Add Pending:** Select Yes, this will pull any future pending charges on the account
2. **Date:** Date of Payment
3. **Method:** Select Payment Method
4. **Amount:** Verify Payment Amount
5. **Note:** If applicable, make a note for the transaction
6. **Receipt:** Select correct "Create & Print" option for your printer
7. **SAVE AND EMAIL** or **SAVE**

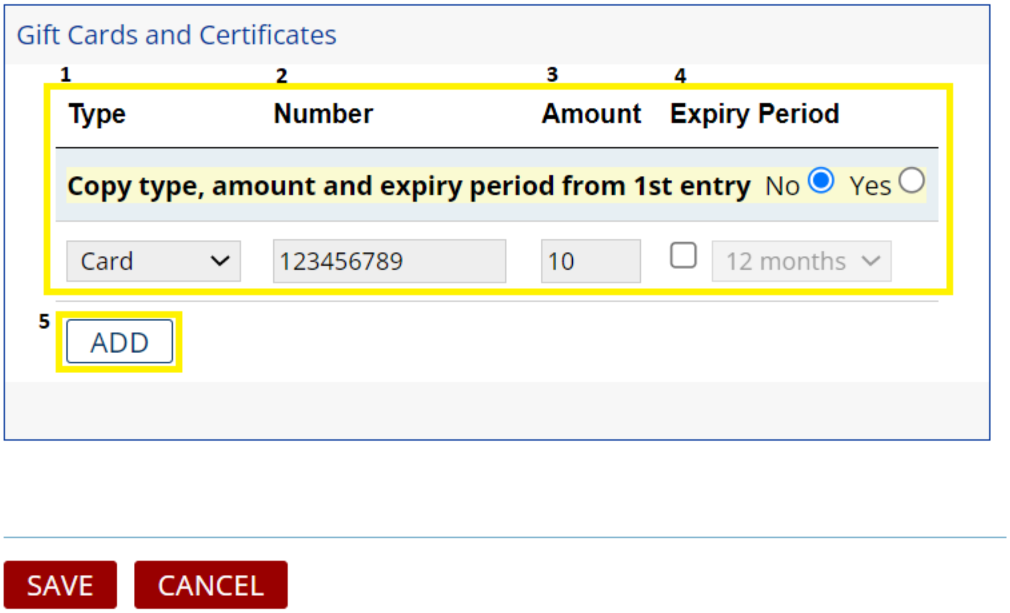
*Note: Please refer to Applying Partial Payments to make partial payments towards future charges

# Creating Gift Cards/Certificates

Left-hand side: **CRM HUB** > **Gifts, Credits & Promos** > **ADD GIFT CARDS AND CERTIFICATES**



## ADD GIFT CARDS AND CERTIFICATES - KELOWNA

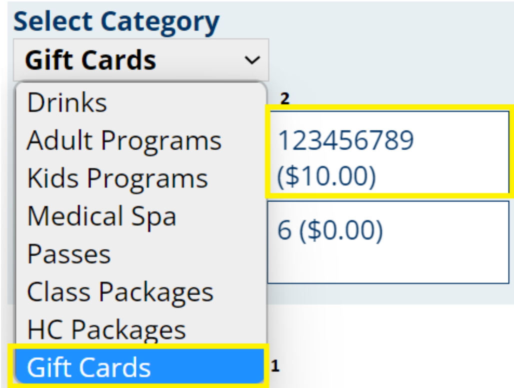



**KEY FIELDS**

1. **Type**: Select Card or Certificate
2. **Number**: Enter Gift Card/Certificate Number
3. **Amount**: Enter Amount (set amount to $0 if client can choose amount at point of sale)
4. **Expiry Period**: Enter Expiry Period (if applicable)
   a. Expiry Period is set upon point of sale. For example, if Expiry Period is set to 12 months, the gift card will expire 12 months from the date of sale
5. **ADD:** (if creating more) > repeat steps 1-4 as needed
   SAVE

## Selling Gift Cards/Certificates

Left-hand side: **POINT-OF-SALES**>**POS**




**KEY FIELDS**

Note: Follow steps 1-4 steps of Adding Point of Sale (POS) Purchase (Updated)

1. Select Category: Select Gift Cards
2. Select corresponding gift card

Note: Resume steps 7-10 of Adding Point of Sale (POS) Purchase (Updated)

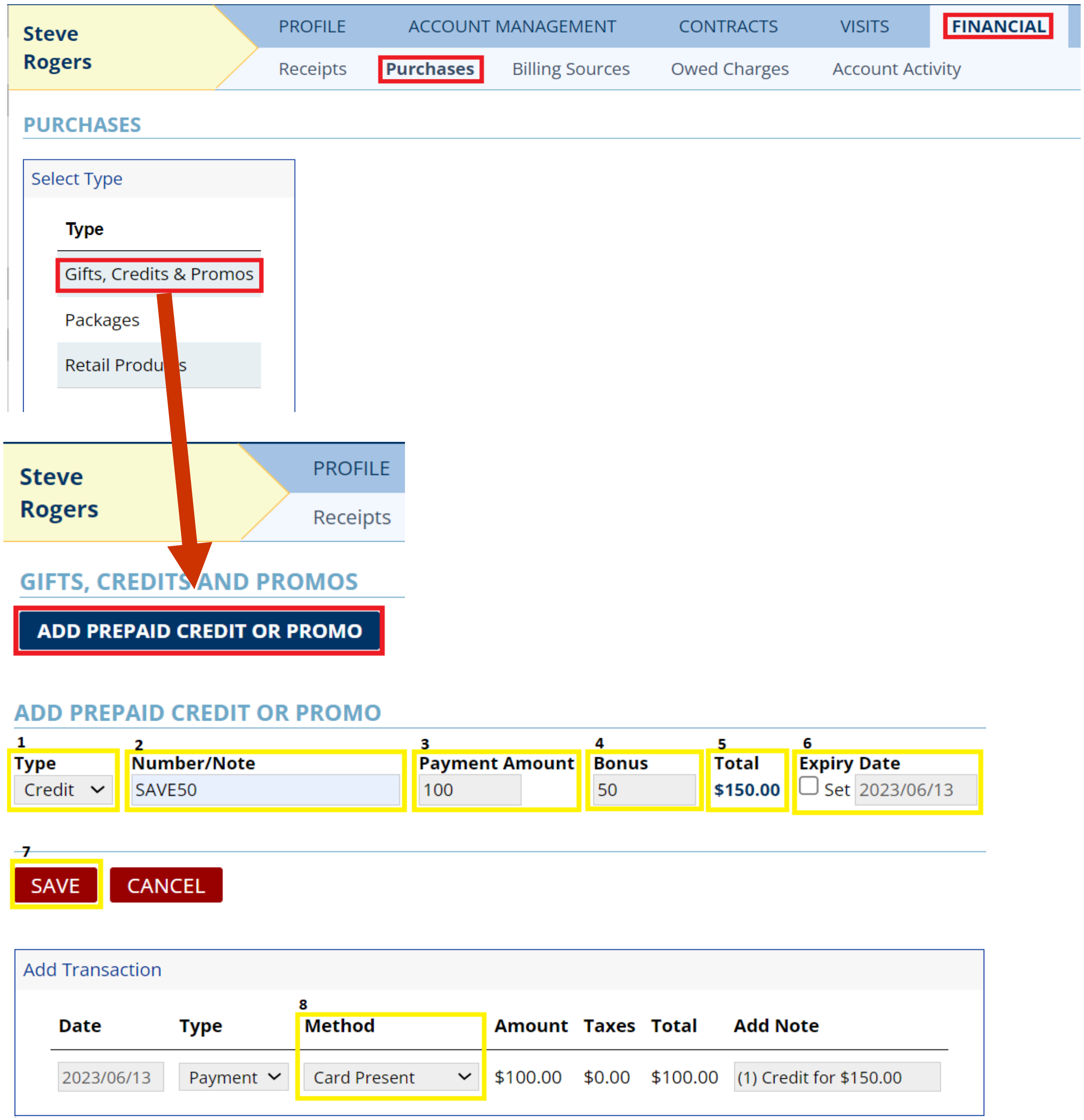
## Applying Gift Cards/Certificates

Left-hand side: **POINT-OF-SALES**>**POS**

Note: Refer to Step 7 of Adding Point of Sale (POS) Purchase (Updated)

# Adding a Prepaid Credit or Promo

After selecting a client account, top menu: **FINANCIAL** > **Purchases** > **Gifts, Credits & Promos** > **ADD PREPAID CREDIT OR PROMO**

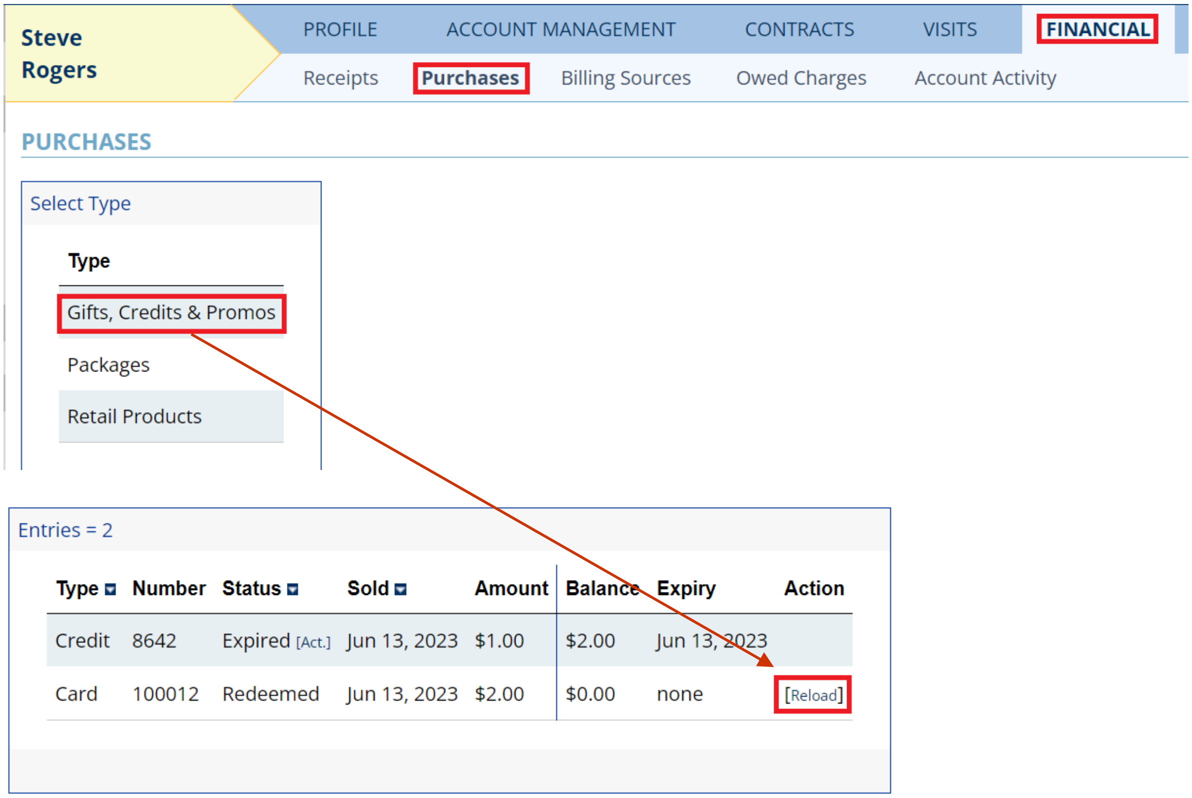


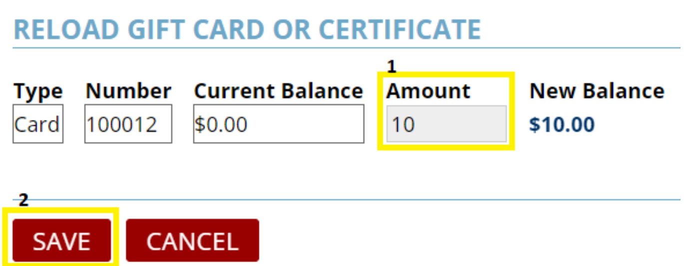

## KEY FIELDS

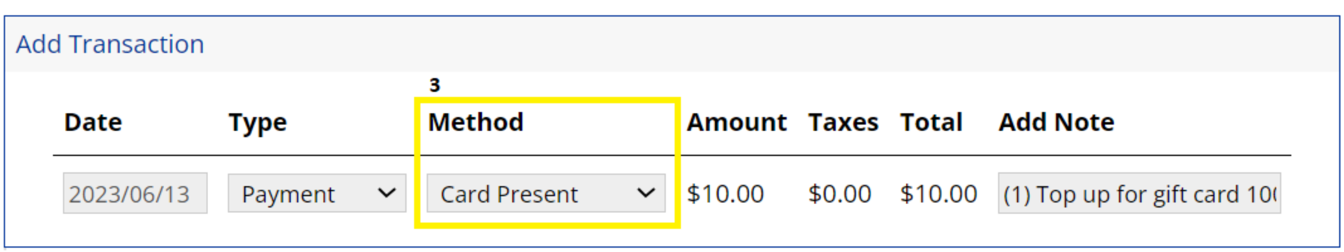
1. **Type:** Select credit or promo option
2. **Number/Note**: Enter credit number or promo code number
3. **Payment Amount:** Enter credit amount being paid for
4. **Bonus:** If applicable, add any additional bonus credit as needed
5. **Total:** Verify total amount being credited
6. **Expiry Date:** If applicable, set expiry date
7. **SAVE:** This will open an Add Transaction table to take a payment
8. **Payment Method:** Select payment method and process payment

# Reloading a Gift Card

After selecting a client account, top menu: **FINANCIAL** > **Purchases** > Gifts, Credits & Promos > [Reload]



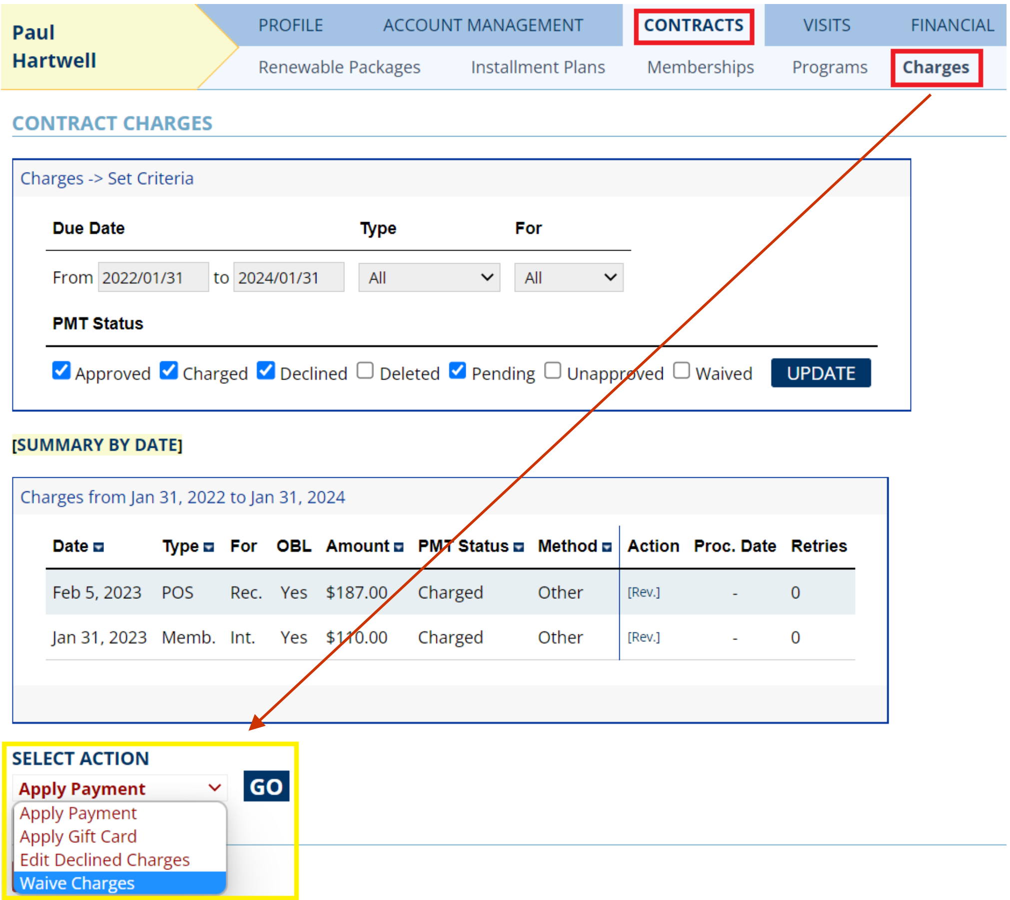




## KEY FIELDS

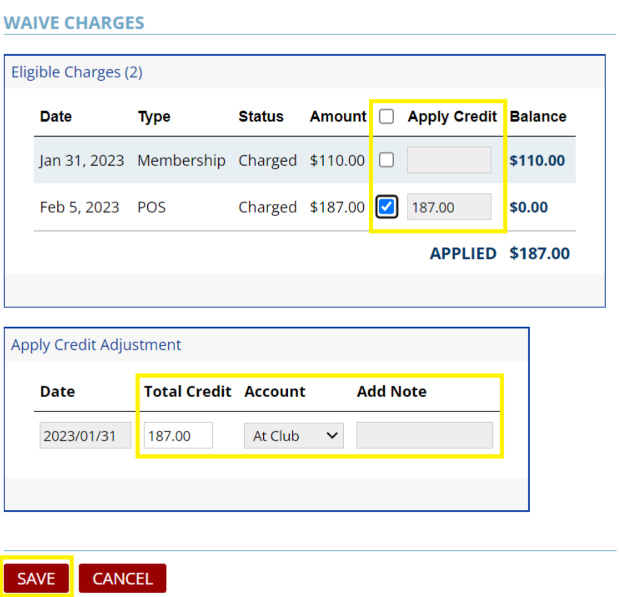
1. **Amount:** Enter amount being reloaded onto the card
2. **SAVE**: This will open an Add Transaction table to take a payment
3. **Payment Method:** Select payment method and process payment

# Waiving Charges

After selecting a client account, top menu: **CONTRACTS** > **Charges** > **SELECT ACTION** > Waive Charges

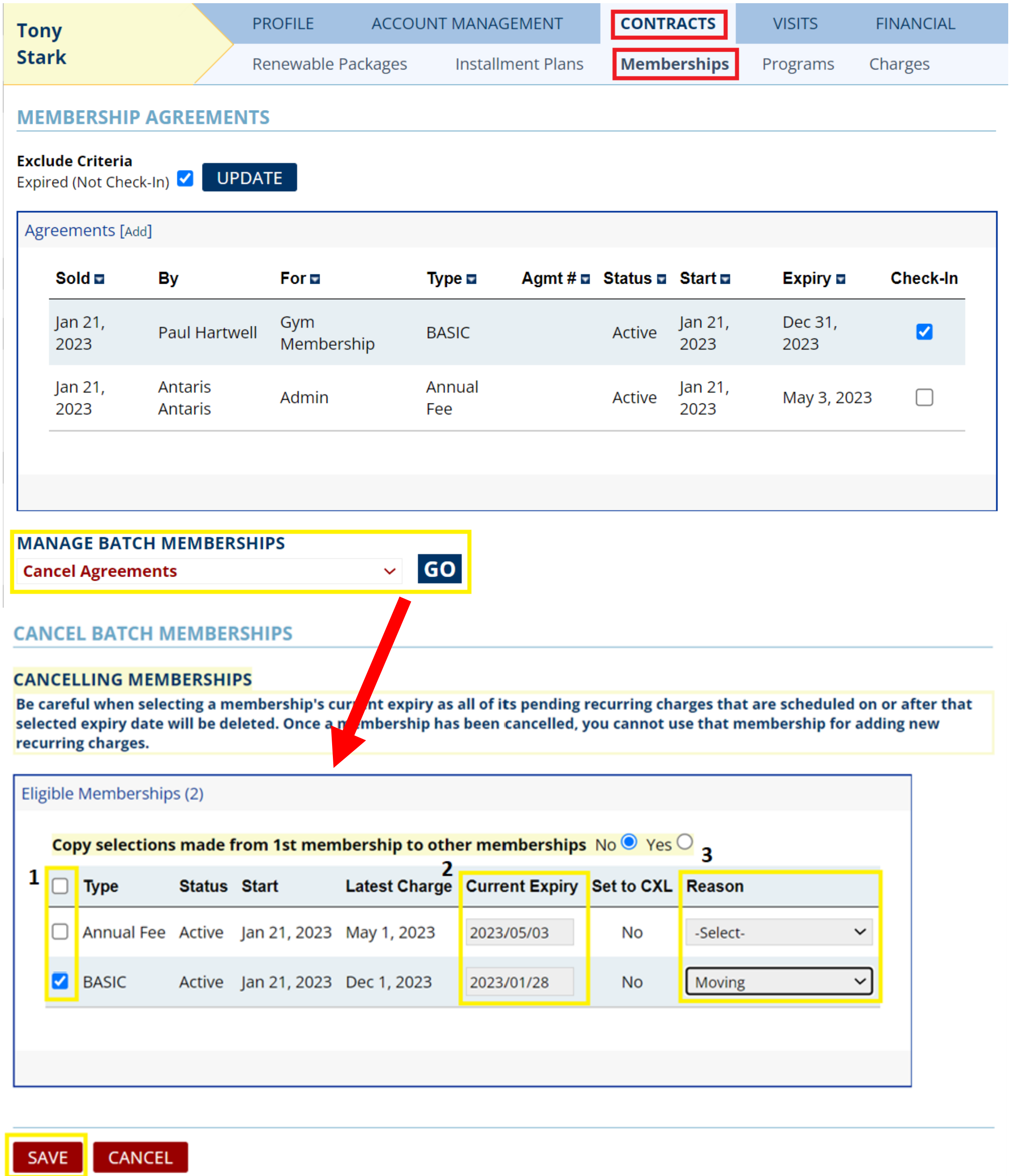



1. Select box for charges being waived (if partial, update the amount in the Apply Credit field) > Verify Total Credit Amount and to what account the credit is being applied to > Add Note if applicable>**SAVE**



# Cancelling Memberships

After selecting a client account, top menu: **CONTRACTS** > **Memberships**

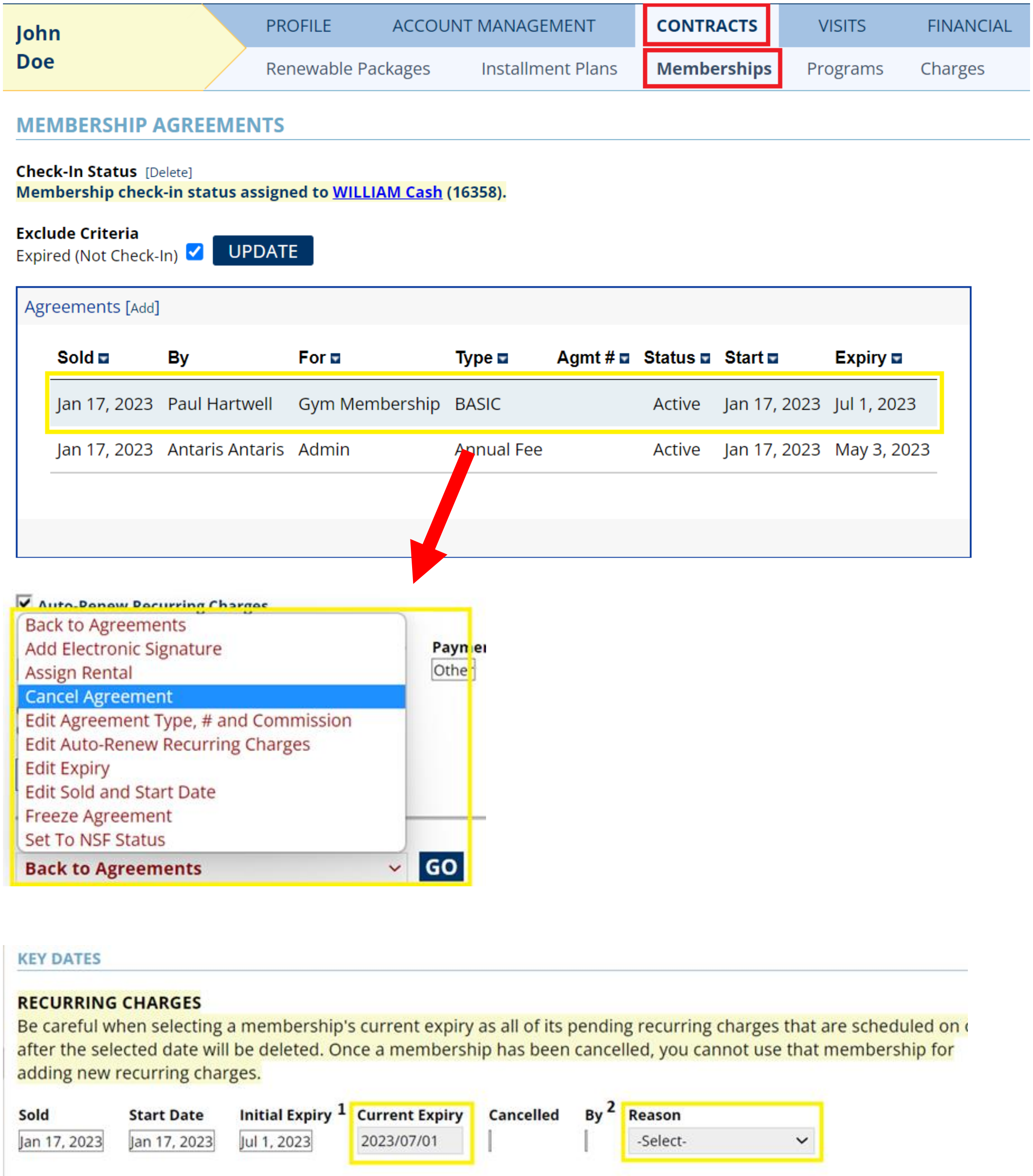



## KEY FIELDS

4. **Select Membership:** Select any or all memberships being cancelled
5. **Current Expiry**: Client's last access date. Any pending invoices after this date will be deleted
6. **Reason:** Select reason for cancellation, if applicable

**OR**

After selecting a client account, top menu: **CONTRACTS** > **Memberships** > Select Membership being cancelled >Cancel Agreement > GO



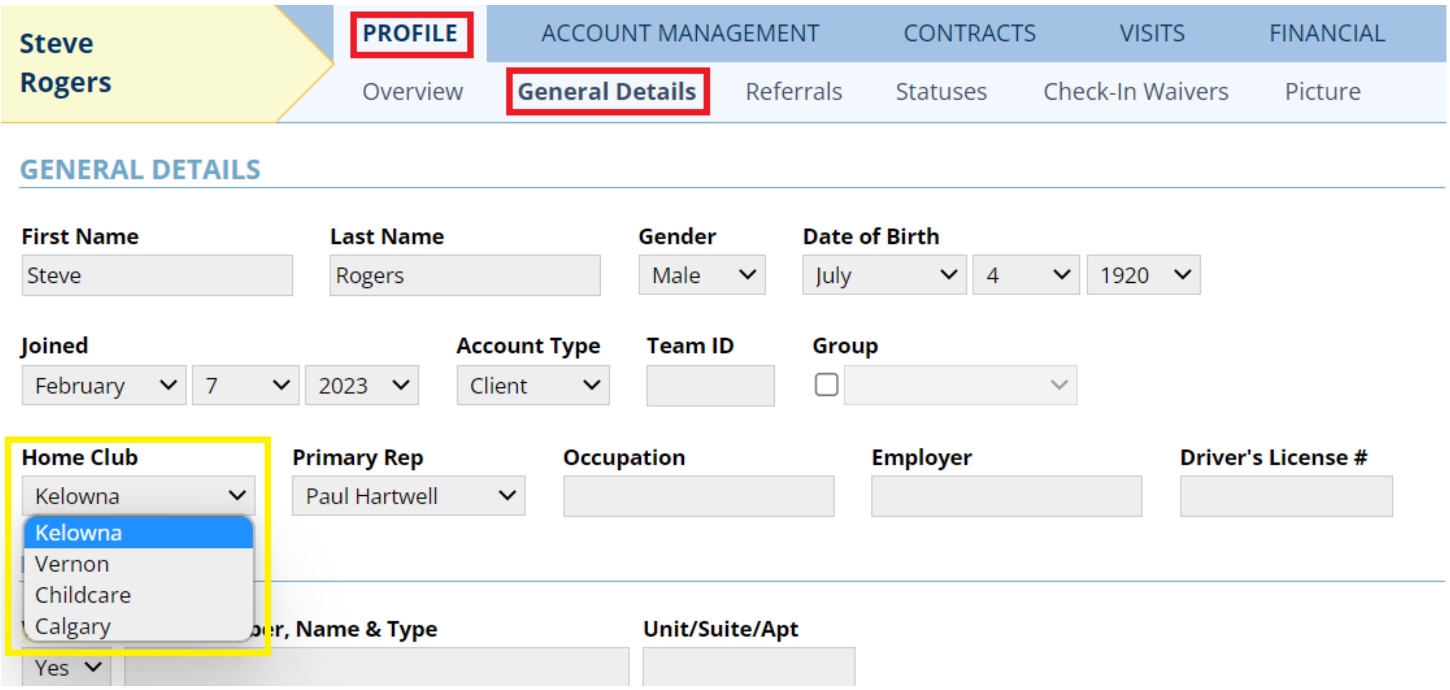

**KEY FIELDS**

1. **Current Expiry**: Client's last access date. Any pending invoices after this date will be deleted
2. **Reason:** Select reason for cancellation, if applicable

# Updating Home Club

After selecting a client account, top menu: **PROFILE** > **General Details** > Edit Home Club

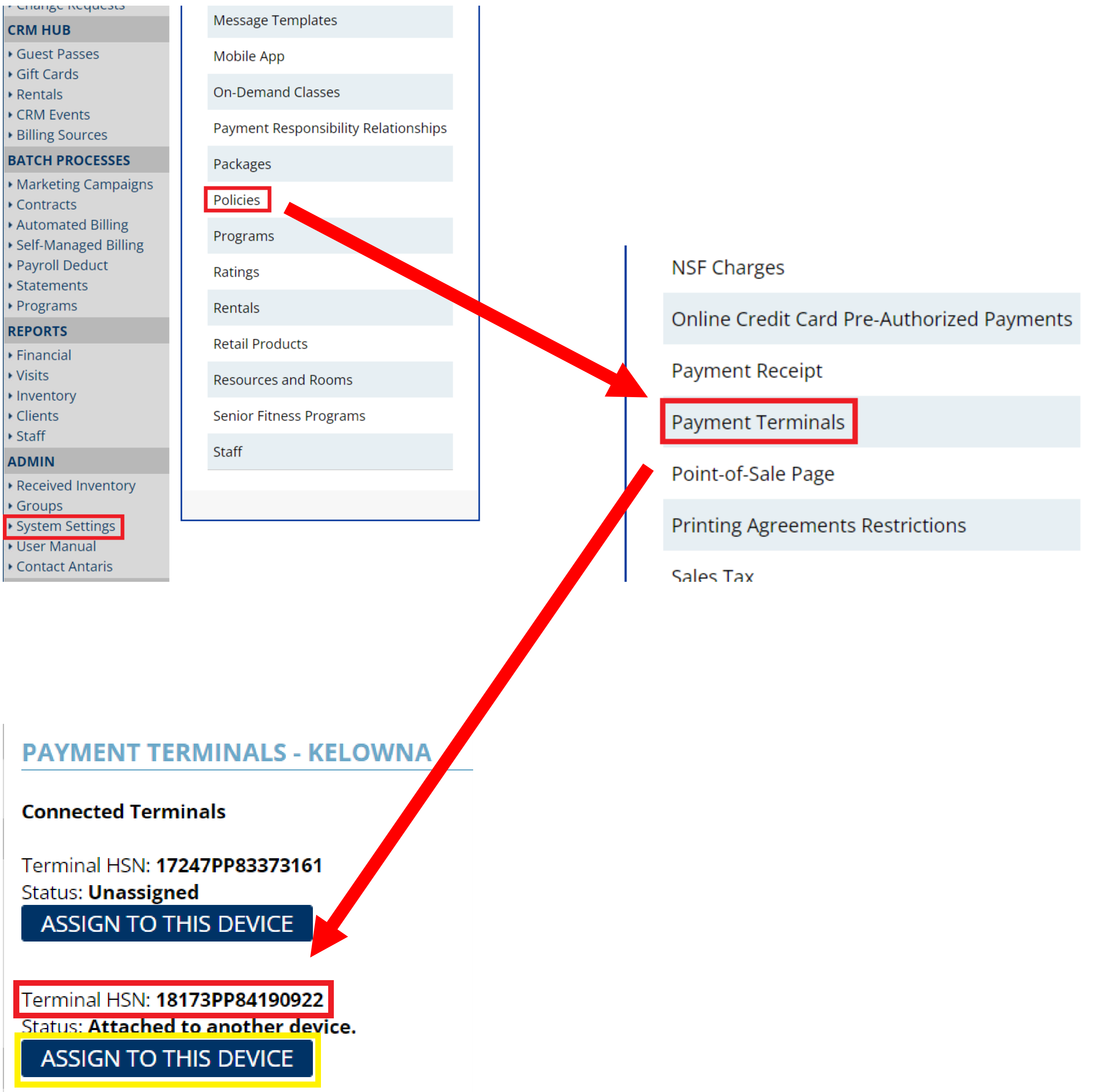
Note: this option to update the 'Home Club' will only appear if a) the client does not have any "pending" Membership charges (i.e. they can't have a membership with ongoing monthly payments) OR b) the client doesn't have its payment responsibility assigned to another client.



# Assigning Payment Terminals

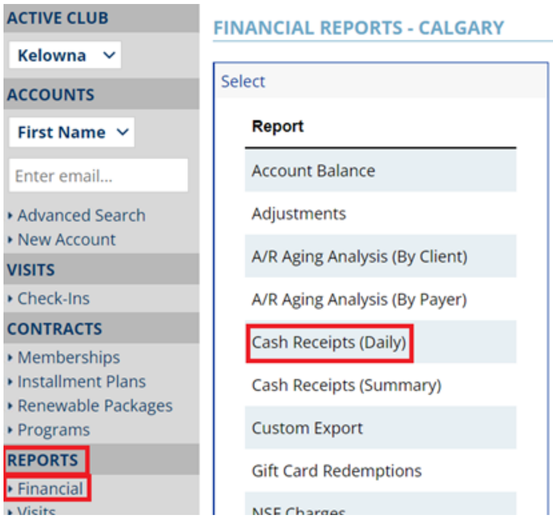
Left-side menu: **ADMIN** > **System Settings** > Policies > Payment Terminals > Verify terminal being used by the Terminal HSN number > ASSIGN TO THE DEVICE

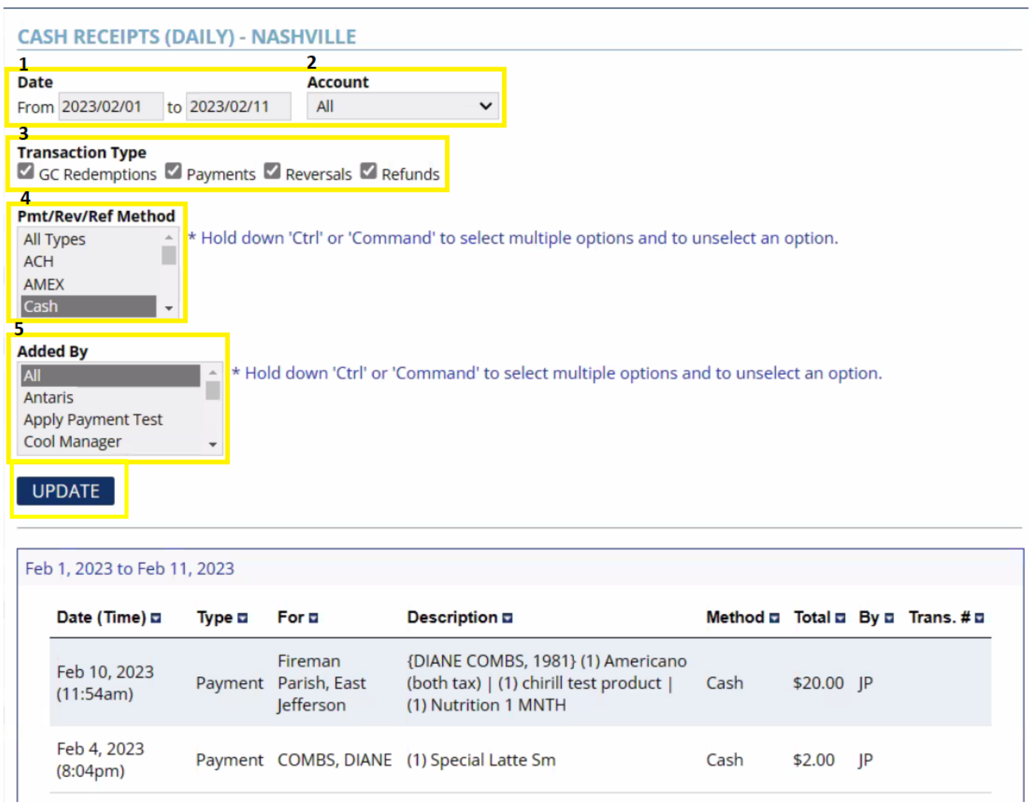
Note: The User account must have the permission "Managing system settings" enabled in order to assign a payment terminal.



# Creating End of Day Cash Receipts Report

Left-side menu: **REPORTS** > **Financial** >Cash Receipts (Daily)




## KEY FIELDS

1. **Date**: Set date range
2. **Account**: Select All or specific account
3. **Transaction Type:** Check transaction types
4. **Payment/Reverse/Refund Method**: Select all or specific method(s)
5. **Added By**: Select all or specific staff account(s)

Note: At the end of the report, there is a Summary Information of the totals

# Contacting Antaris

Left-side menu: **SUPPORT** > **Contact Antaris** > Submit question to Antaris by filling out this form with accurate contact information and a detailed question.