Overview: MBO is your POS (Point of Sale) System and you will need to familiarize yourself with how to properly retail out clients for purchases of new services such as memberships, packages, additional sessions, gift cards, and all retail items including OTbeat, Clothing, Accessories and Drinks. Knowing how to process retail transactions is part of the daily tasks of all staff and they should be familiar with how to navigate, location and process sales.

Video: Retailing out in MBO Part 1. takes you through retail tab, Products, Contracts/Packages and should no use that video beyond the 2:04 minute mark because I identified that the training site was missing options in the drop down. Had the MBO team make adjustments and The Part 2 video picks up at the Payments/Gift Cards tab and completes the entire sale.

Retail Tab: How to sell Retail items by searching by keyword, barcode, or scanner to sell (OTbeat, Clothes, Bottles, Hats, Accessories, Water, etc.)

Services Tab: Where staff will find and sell - Additional Sessions, Late Cancel Fees, Drop-In Rates, Comp Sessions, Cross Regional Fees, OTbeat Rental Fees AND 10,20,30 Packs.

Contracts/Packages Tab: All available Membership options will be found here for Basic, Elite, Premier. Packages if referring to promotional packages that we will offer at times but not our 10,20,30 packs.

Payments/Gift Cards Tab: This is where staff can process Account payments, Retail Bucks, Gift Cards to be used later as an payment method option once the funds have been added to an individual's account.

Host/Narrator: You will learn how to navigate the retail screen along with retail products, services and memberships within MBO.

Steps:

1. After logging into MBO click on the "retail" tab on the far right of the screen.

2. It will redirect you to a search screen. In the middle search bar, type in the member or guests name.

    a. You can add a new client

    b. You can select the name of the last person's account you accessed.

    c. Walk in sale

Note: Highly recommended to avoid processing a walk in sale unless it is as simple as purchasing a bottle of water. Reason being, it is a lot easier to process a sale when it is associated with a profile. Every member or guest that has been to your studio should have a profile created so that you can reference their profile after the purchase has been made in the purchases section.

3. Once you select the name you want to retail (in this example, we will type in Shannon Cummings). Once entered, it will redirect you to the retail screen.

Note: MBO is our POS. This is where you will retail out anything sold through your studio.

    a. Looking at the screen, we will start on the right hand side is where you will find all of the tabs. Think of it as the "shopping area" or retail area-where you will find anything you need to or are permitted to sell within your studio.

      b.   On the left hand side of the screen is to identify the shopping cart or rather who's purchasing items as well, did you (the staff) select the right items

Retailing Products:

1. On the right side "shopping area", click on Products. Products will have merchandise, OTbeat, water.

      a.   You can search by a keyword . For instance, if you are looking for OTbeat Burn, you can type in OTbeat or Burn and a list of items will appear that has the word "OTbeat or Burn" in the system and scroll to find the item you wish to retail.

      b.   The other option to search item is to scan the item's barcode with your scanner if available

      c.   Or you can type in the barcode item.

2. Once the item is selected, click search. If applicable change the "quantity"-you have that option to change the quantity of any item. (For this example, we will leave the quantity at one as she is only purchasing one Burn today)

3. Click "add item". Adding an item will take it from the "shopping or retail area" to the "shopping cart" on the left side.

      a.   You have the option to continue to shop or move forward with sale process by selecting the payment information.

NOTE- From here you would complete the sale if that was the only item the client was looking to purchase today by selecting the payment method to complete this purchase. (Did not film this part here as it's added at the end of the video for the entire sale.

Retailing Services: Is where you will find additional sessions, cross regional sessions, drop in fees, rental, comps, late cancel charges, etc. The other item that is found in Services are the 10, 20, 30 packages

1. Click on Services, click on the drop down.

      a.   You will mostly select "group fitness" as that is where all the options are stored. The other selection is Dri Tri which is a special bi-event, where specific items for purchased are housed there.

2. An additional drop down will appear, click on the drop down.

3. A list of items will appear, select the item you wish to retail and click "add item" which will then send it to the left side also known as the "shopping cart".

4. In this example we add the Rental OTbeat – Burn fee of $10.

NOTE- From here you would complete the sale if that was the only item the client was looking to purchase today by selecting the payment method to complete this purchase. (Did not film this part here as it's added at the end of the video for the entire sale.

Retailing Contracts/Packages: This is where you will find all of the membership types. The packages is not the 10, 20, 30 packs but rather a special bundle. For example, "the orange voyage kit".

1. For this example, let's sell Shannon a Premier Membership. Click on "select a contract" drop down.

2. A list of options will appear. Click on "orange premier membership". It will then appear in the "shopping area"

3. Starting with "contract start" date-in most cases, this should be the date we will actually process and charge but also their billing date moving forward. Ex. Today is 8/16, we retail her out today, every 16TH of the month moving forward is when she will be billed her monthly due.

   a. The other option is to "post date". For brand new studios, they will have to post date all pre sale memberships on the day of their grand opening once they know that exact date. For example, the grand opening is 8/22. Clicking on the little calendar symbol, you would change the date from today (8/16) to 8/22. And most importantly with post dating pre sale memberships, is to UNCLICK "pay now" so the member is not charged any sooner than the grand opening day.

Note: That should be the only time to "post date" memberships is during Pre sales, not for open studios.

4. Back to Shannon's membership, click "add item" sending it to the left shopping cart to continue with the charge.

NOTE- From here you would complete the sale if that was the only item the client was looking to purchase today by selecting the payment method to complete this purchase. (Did not film this part here as it's added at the end of the video for the entire sale.

<mark>END OF PART 1. VIDEO AT 2:04</mark>

Retailing Payments/Gift cards: (Start of Retailing out in MBO Video Part 2.) Sell or retail out a gift card for a friend for the holiday or bday that could be applied to his/her acct and she can use it for retail or if she forgot her water bottle, she can purchase using her gift card. You can also retail "retail bucks" which can be used to the studio's discretion. Studio bucks means the studio is gifting a member "retail bucks" to go toward studio retail ONLY. For example, if your studio was running a "refer and receive" special or promotion for the month (refer a friend, receive a gift from the studio), so a member who referred a friend to take a class and that friend signed up as a member, the referring friend would receive "$20" retail bucks".

1. So going back to Shannon as our example, lets say with her membership, she referred 5 names for us to call to book an otf session, we would then gift her "$20" retail bucks" by clicking on "payments/gift cards"

2. Clicking on the "item name" drop down and select $20 retail bucks

   a. You will notice that the price is $0.00-that is because we are gifting it to her so we are incurring the cost of this. However, we will be giving her a "credit" to her account.

3. Click add item. Once the item is retailed out, you will notice an account balance next to her name.

Note: Retail bucks must be retailed out completely and added to a member's profile before it can be used as a payment method for a purchase. Which means any future purchases, we would retail the items

she wishes to buy, then we would click on "account" under payment method, instead of her CC (key/stored).

4. Another option is Gift Card. With the drop down, select "gift card-assignable"

    a. It will show as assignable $0. You can add it to an existing client or new client by adding all of their information.

    b. You can leave it unassigned or undesignated-highly recommended to not click that option because when you add it to a person's account, it will always be listed on the that individuals account, for reporting purposes, these purchases can be easily found.

5. To add a GC to an existing member, click on existing client next to recipient, type in the name.

    a. The GC ID is randomly generates it-check with your studio if you house GC in your studio. Because we are adding it to the account, having a physical card is not as important. But because the system randomly generates the number, copy and paste it into that members' account. Or as a gift, can create a certificate or however that processes looks in your studio.

    b. Change the price for how much, ex. $150.

    c. Add to card

6. One last option is Account Payment. This is the option for a member to create their own account balance on their account. For example, Shannon would rather her CC not be charged for a water every time she forgets it, but rather an account balance. So she can ask to put $20 on her account for the staff to charge whenever she forgets a water or purchases something small.

    a. Click on Account payment

    b. Adjust the price, $20 for this scenario, it will add $20 to her credit.

    c. Click add item

Charging for the items purchased to complete the sales process.

1. On the left side, the shopping cart side

2. Ensure the item(s) is correct

3. Under payment info, select a payment method…if you look next to the members name at the top, you will see a green CC which means a cc is saved to a members profile.

4. Payment method options: Account, CC key stored, CC swipe. Unless they have an account balance, you will select CC key stored

5. Click on "send email receipt" to ensure the member has it to track.

6. CC information will appear confirm payment

7. Click save print receipt to complete the sale

Additonal Notes: When a member has an account balance from their own purchase of adding money onto their account, or refer and receive retail bucks recipient, a dollar symbol will appear next to their

name and anytime you charge for something outside of their membership, you will click on account as the payment method and not cc key stored. (Indicated with the Green dollar bill icon next to clients name)

Assigning a GC box-you can enter the GC generated number in the "assign gift card" box and click assign. It will add the funds from that GC to the clients account and the balance will show the same as account balance. (Green dollar bill icon)

Promotional code(s) box: Corporate has a list of approved promo codes that can be applied to certain promotions and if your studio is using them, type in the promo code in the ticket box and click apply. You will notice after it is successfully applied, it will adjust the price with the discounted amount.