

F119: Advanced Employee Functions

(Covers adding new employees, assigning employees to clubs, setting employee security levels, and working with employee commissions and bonuses.)

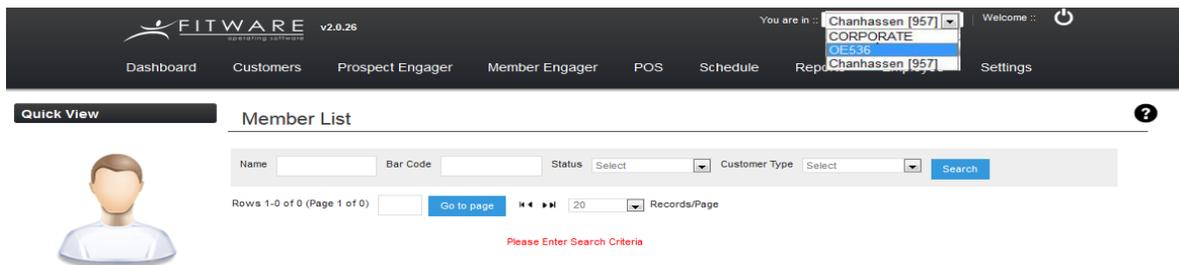
1. Overview
2. Setting Employee Commissions and Bonuses
3. Adding New Employees

Overview

This course assumes you have Ownership level access to Fitware. The functions explained in this course *cannot* be performed without this access.

If you do not have access to the Ownership Entity level, please disregard this course.

To switch to the Ownership Entity security level, select the OE drop-down in the upper-right corner of your Fitware window:

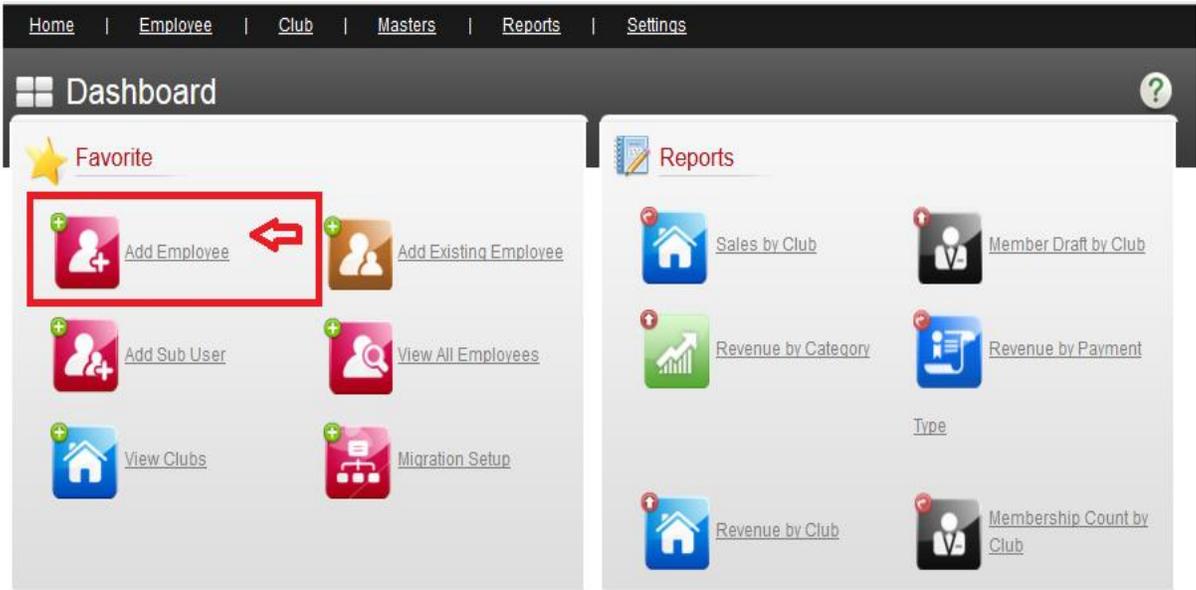


The screenshot shows the Fitware software interface. At the top, there is a navigation bar with the Fitware logo and version 'v2.0.26'. On the right, it says 'You are in: Chanhassen [957]' with a dropdown menu showing 'CORPORATE' and 'OE:536'. Below the navigation bar, there are several menu items: Dashboard, Customers, Prospect Engager, Member Engager, POS, Schedule, Rep, Chanhassen [957], and Settings. The main content area is titled 'Member List' and features a search form with fields for Name, Bar Code, Status (Select), and Customer Type (Select), along with a Search button. Below the search form, it displays 'Rows 1-0 of 0 (Page 1 of 0)' and a 'Go to page' field with a '20' dropdown for 'Records/Page'. A red message 'Please Enter Search Criteria' is visible below the search form.

Adding New Employees

If they are a previous member or are on a normal membership agreement, you will need to search their information and terminate the account if you are reusing the barcode. Please take note of the barcode.

1. Click **Add Employee**:



2. Fill out the requested information, then click **Next**:

Personal Details

Prefix: *

First Name: *

MI:

Last Name: *

Gender: Male Female

BirthDay: *

Login Email: *

Image:
 [Note: Upload only .jpg, .gif, .jpeg, .png files only]

Address Details

Street 1: * Zip/Postal Code: *

Street 2: Optional Field:

Street 3: Email: *

Country/Region: *

State/Province: *

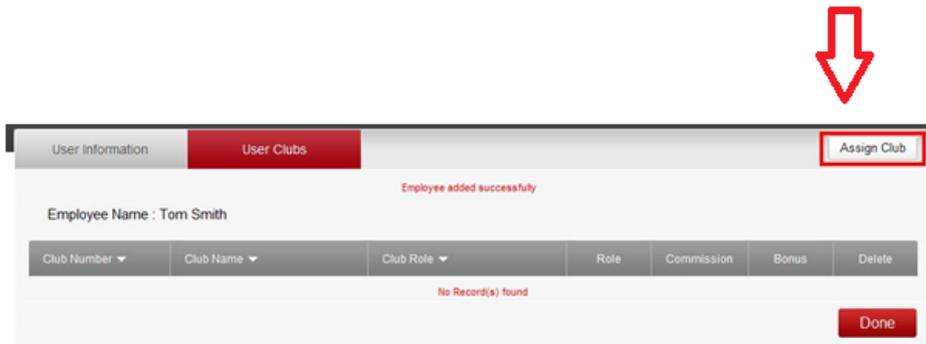
City/Town: *

Phone Details

Cell: * Home:

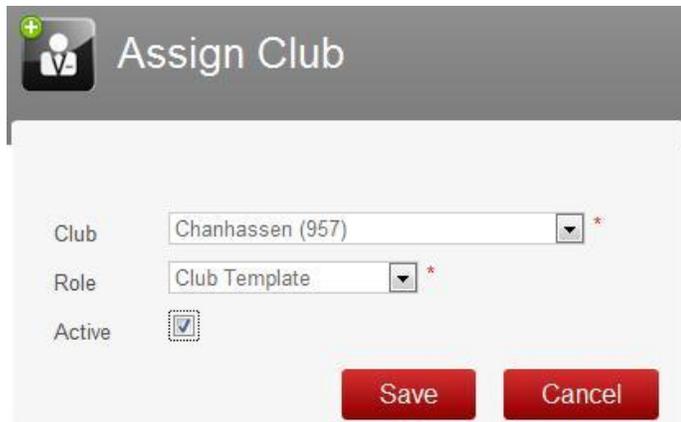
Work:

3. Click **Assign Club**:



The screenshot shows a web interface with a top navigation bar containing 'User Information', 'User Clubs', and 'Assign Club'. The 'Assign Club' button is highlighted with a red box and a red arrow pointing down to it. Below the navigation bar, there is a message 'Employee added successfully' and 'Employee Name : Tom Smith'. A table with columns 'Club Number', 'Club Name', 'Club Role', 'Role', 'Commission', 'Bonus', and 'Delete' is shown, with a message 'No Record(s) found' below it. A 'Done' button is located at the bottom right.

4. Choose a club from the drop-down list of choices, assign a security role, check **off** the employee as being **Active**, and click **Save**:



The screenshot shows a dialog box titled 'Assign Club' with a plus icon and a person icon. It contains three fields: 'Club' with a dropdown menu showing 'Chanhassen (957)', 'Role' with a dropdown menu showing 'Club Template', and 'Active' with a checked checkbox. At the bottom, there are 'Save' and 'Cancel' buttons.

5. You will receive a message that the club was assigned successfully; click **OK**.
6. If you wish to assign the employee to any other clubs, click the **Assign Club** button in the upper-right corner. You may assign an employee to as many different clubs as you would like, giving them a unique security profile, and commission and bonus structure, at each club.
7. To edit the employee's role, bonus, or commission at any club, click on the icon in the appropriate columns.
8. Click **Done** when you are finished. You will receive a message that the employee was added successfully.
9. Now you will need to go back to the club tier to set up the employee plan and assign the barcode.

10. Go to Customers tab→Sign Up→Employee

Step 1 - Membership Sign-up Information

Member Type Agreement Details Members

New Member Prospect **Employee** Re-sign Terminated Member

11. Select the employee's name from the drop down box and click **next**.

Step 2 - Employee Agreement Details ?

Member Type Agreement Details Members

Fields marked with * are required.

Employee Test Employee *

Plan Category Home Club

plan Employee Plan Term Month to Month

Start Date 2/18/2016

Contract End Date Auto Renew

Date of Next Payment -

Payment Frequency -

Next Cancel

12. On this screen you will enter in the barcode, and select a source (it does not matter what source you choose, it is just a required field), click **Next**.

Personal Details

Barcode

Gender Male Female

Birthdate January 3 1988

Prefix Mr

Source Select

First Name Test

Lead Generator Select

MI

Referred by Select

Last Name Employee

Image (Note: Upload .jpg, .gif, .png files only)

Address Details

Street 1 123 m

Type Cell

Phone Number 3195554444

Street 2

Home

Country/Region United States

Work

State/Province Minnesota

Email cpartner@iforands.com

City/Town Chanhassen

Zip/Postal Code 55543P

Optional Field

Next

13. This screen will ask you for banking information, since we do not charge employees for their memberships, you can **uncheck** the box in the upper right hand corner and click **Next**.

Bank Account Information Select Bank Account

Name On Account: * Please input a full Name. Routing #: * Routing number should contain only numerals.

Bank Name: * Please give this bank a name. Account #: * Please input an account number.

Street 1: Street 2:

Street 3: Country/Region:

State/Province:

City/Town:

Zip/Postal Code: Optional Field:

Work Phone 1: Work Phone 2:

Cell Phone 1: Cell Phone 2:

Other Phone:

14. It will then ask you for credit card information, **uncheck** the box in the upper right hand corner again and click **Save**.

Step 3 - Employee Payment Details ?

Member Type Agreement Details **Members**

 Fields marked with * are required.

Credit Card Details Select Credit Card

Name on Card: * Please input a full Name. Card Type: *

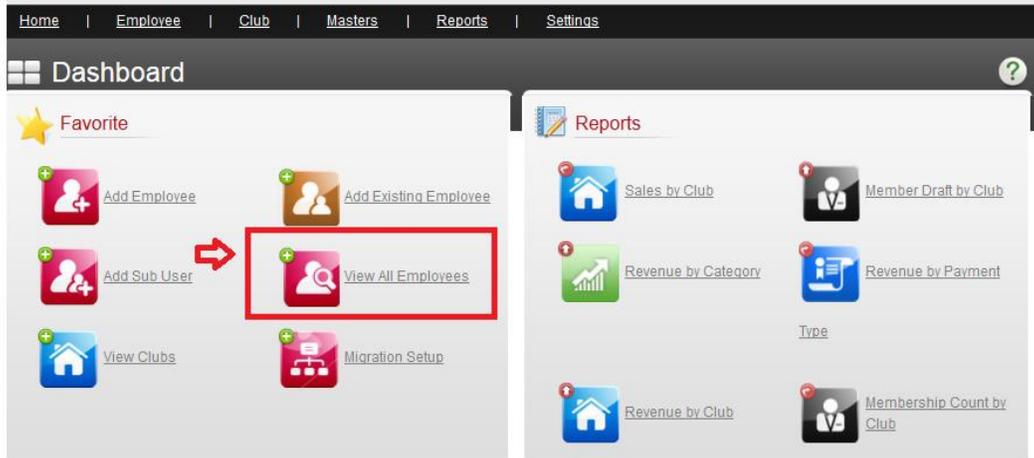
Card #: * Please input a valid Card Number. CVV Number:

Expiry Date: *

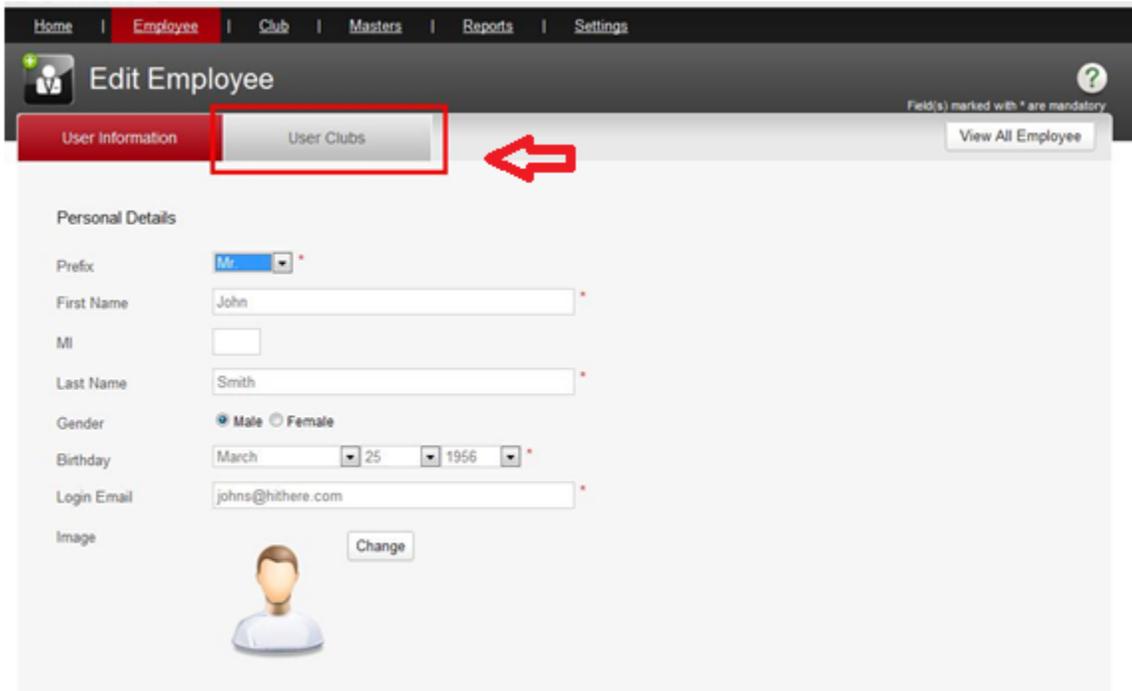
15. You will receive a message that the employee was added successfully. This will automatically link the barcode for you, the card will update for the doors within the next 20-30 minutes.

Setting Employee Commissions and Bonuses

1. Click **View All Employees**:



2. Click the icon in the *Edit* column next to the employee's name.
3. Click the **User Clubs** tab near the top:



- You will see a listing of all club or clubs to which the employee is assigned. To edit their commissions and/or bonuses at a particular club, click the icon in the appropriate column:

User Information | **User Clubs** | Assign Club

Employee Name : John Smith

Club Number	Club Name	Club Role	Role	Commission	Bonus	Delete
957	Chanhassen	Club Template				

Done

- Commissions can be set on Membership Sales, PT Sales, and Product Sales. Choose from the drop-down menu at the upper-left, then click **Search**:

Club Number : 957

Item Type: Select | Category: Select | **Search** | View All

Item	Item Type	Category	Commission Type	Amount (\$)	Edit	
<input type="checkbox"/>	14620790	Product	Miscellaneous	Currency Amount	0.00	
<input type="checkbox"/>	16397298	Product	Miscellaneous	Currency Amount	0.00	
<input type="checkbox"/>	5 HR Energy	Product	Food and Beverage	Currency Amount	0.00	
<input type="checkbox"/>	Access Card Fee	Product	Access Cards	Currency Amount	0.00	
<input type="checkbox"/>	Auxillary Access	Product	Member Services	Currency Amount	0.00	
<input type="checkbox"/>	Beverages	Product	Food and Beverage	Currency Amount	0.00	
<input type="checkbox"/>	Boot Camp	PT Service	Classes	Currency Amount	0.00	
<input type="checkbox"/>	Bottled Water	Product	Food and Beverage	Currency Amount	0.00	
<input type="checkbox"/>	Cabinet	Product	Miscellaneous	Currency Amount	0.00	

Batch Change | **Done**

- Commissions on Memberships and Products can be set as either *Currency* only, *Percentage* only, or *Currency and Percentage*:

Edit Commission

Commission Type: Currency Amount and *

Currency Amount: 5.00 *

Percentage: 10 *

Save | **Cancel**

7. Commissions on PT Sales include a **Service Percentage** amount (paid when the Session is marked as **Consumed**):

Commission Type Percentage *

Percentage 10.000 *

Service Percentage 60.000 *

Save Cancel

8. Bonuses are **only** paid on **Membership Sales** (not PT Sales or inventory products). Select the membership category using the drop-down menu at the upper-left corner, then click **Search**:

Item	Category	Bonus Type	Amount (\$)	Edit
<input type="checkbox"/> Employee Plan	Home Club	Currency Amount	0.00	
<input type="checkbox"/> Family - Home Club	Home Club	Currency Amount	0.00	
<input type="checkbox"/> Family - Pre-paid	Pre-paid	Currency Amount	0.00	
<input type="checkbox"/> Family - Reciprocal	Reciprocal	Currency Amount	15.00	
<input type="checkbox"/> Joint - Home Club	Home Club	Currency Amount	0.00	
<input type="checkbox"/> Joint - Pre-paid	Pre-paid	Currency Amount	0.00	
<input type="checkbox"/> Joint - Reciprocal	Reciprocal	Currency Amount	0.00	
<input type="checkbox"/> Membership Dues	Reciprocal	Currency Amount	0.00	
<input type="checkbox"/> Single - Home Club	Home Club	Currency Amount	0.00	

9. To edit a bonus, click on the icon in the *Edit* column.
10. Commissions can be set as either *Currency only*, *Percentage only*, or *Currency and Percentage*:

Note: For information on how to see a commissions report for an employee, please review course [F118](#).