

SAMPLE NOTES

If Trial happening that day:

2/1/2018 11:10AM: Toni – Trial M 4:00 pur 6-8 Erica

If you got a new waiver, add:

2/1/2018 11:10AM: Toni – Trial M 4:00 pur 6-8 Erica. Got waiver.

In custom 1 you put:

Custom 1: - Trial M 2/1

If balance: - If credit: +

Both must be followed with a SPACE Then explanation

If setting up a Trial for a future day:

2/1/2018 11:10AM: Toni – Trial set for 2/8 M 3:00 KII Connie

Then on 2/8, day of Trial, we should see either:

2/8/2018 11:10AM: Toni – Came for Trial

OR

2/8/2018 11:10AM: Toni – NS

If they came and do not pay for class that day, follow up with call & hold spot for one week to see if they come back. If they do not follow up with call. If they did not come, drop them from the class in CM, but still call to see if they would like to re-schedule.

Other Custom 1 Samples: (always + or - SPACE, then explanation)

- Trial M 2/8
- GS grips
- move KI T to Th
- BD bal
- Sep
- Sep/reg fee
- MG Sep
- MG Sep /reg fee
- move 1 to 1.5 hr
- + camp
- + move Green W to S
- + overpay
- + referral bonus
- + drop

AUTOPAY goes in Custom 2 in caps
HOME SCHOOL goes in Custom 2 as is

CAMP goes in Custom 4 in caps
MILITARY DISCOUNT goes in Custom 4
50% for existing customers/25% new