



A Mentor's Checklist for Training iGo Figure

The "Notable 9" are the basic areas new franchisees need to know before leaving the Club.

1. Business Defaults

General Tab

- *Franchise Number
Shows on Projection Sheet and other reports
- *Go Figure Customer ID Number
Shows on Main Menu, and helpful in getting technical support and re-registration

Banking Tab

- Account Number & Routing Number/Sort Code
- Both are used in printing Deposit Tickets
- Returned Check Fee

Taxes Tab

- Covers all tax, regardless of whether it is sales tax, VAT tax, GST or PST tax, etc.
- Can be specified to be included in the price before the sale (e.g., U.K., Ireland, New Zealand, Australia), or added at the time of the sale (e.g., U.S., Canada)

Integrated Electronic Payment Solutions

- Go Figure offers several different integrated electronic payment solutions. These solutions vary from country to country. Please contact Go Figure to see whatever solutions may be available for the country in which you are mentoring.

2. Employee Information

Time Clock Number

- Can be a key tag number for clocking in with a scanner

Pay rate

- Used in calculating wages on the time sheet report

Current Box

- Uncheck this box, and employees will no longer show up in drop-down lists

the Notable



1. Business Defaults
2. Employee Information
3. Member Records
4. Member No-Sale
5. Money Management
6. Paperwork
7. Timesheet
8. Backing-Up
9. Getting Help

* Denotes important features that users often forget

3. New Member Wizard

- Salesperson & Lead Generator: Used in calculating commissions
- Contract Dates: Date Joined, Contract End Date, Next Payment Date
- Dues
- Account Information: Used in association with the membership
- Sign-Up Fees & Dues Paid at Sign-Up: Used in showing New Sales on Projection Sheet

4. *Member No-Sale

- Enter No Sales = Accurate data, and better Projection Sheets
**Salesperson, Reason for No-Sale, and Source*

5. *Money Management

- Projection Sheet will be accurate regardless of whether Money Management is used
- Daily Gross Sheet only reflects transactions processed through Money Management
- Re-sales may need to clear Money Management if the previous owner was not using this feature

6. Paperwork

- Total Days Club is open this month — Needs to be done once per month, and is used in the Projection Sheet calculations
- Call In/Out and Appointments In/Out — Needs to be filled in every day. Used for Projection Sheet and Traffic Control Sheet

7. Timesheet

- Owners need to know how to print this report

8. Backing-Up

- Stress to owners that backups should be made every day
- Use something *other* than the hard drive for backing up

9. Getting Help with iGo Figure

- Electronic Help File/Printed Documentation — *a/ways* available
- Email - Tech support guarantees a 24-hour response time, except on weekends.
- Telephone support is available Mon. - Fri. 8 a.m. - 4 a.m. (CT). **Available 20 hours per day!**
- Go Figure's e-mail address, and Technical Support hotline number, are available on the Main Menu, along with your Customer ID Number.