

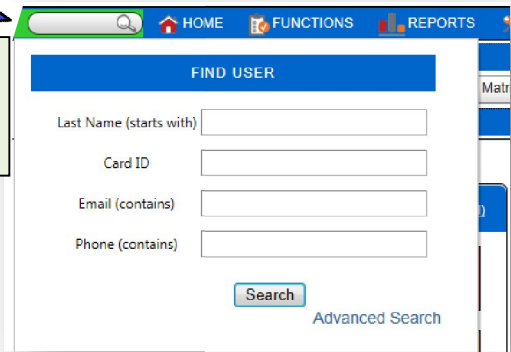
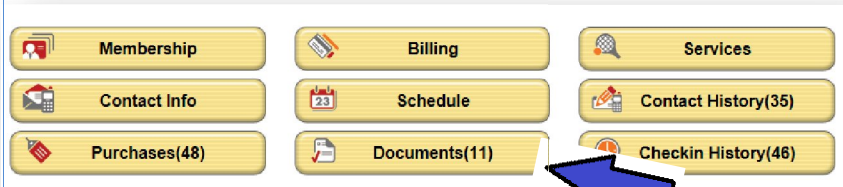
Auto-Fill Contract Features

How to test the auto fill tags on your custom contracts and agreements after The Document Management Team has loaded them into your system.

Basic Member Agreements

These are not pulling any specific membership or service information.

Start at the Home Page and use the Search function to pull up your sample member or guest.

Choose Documents on the detail page.

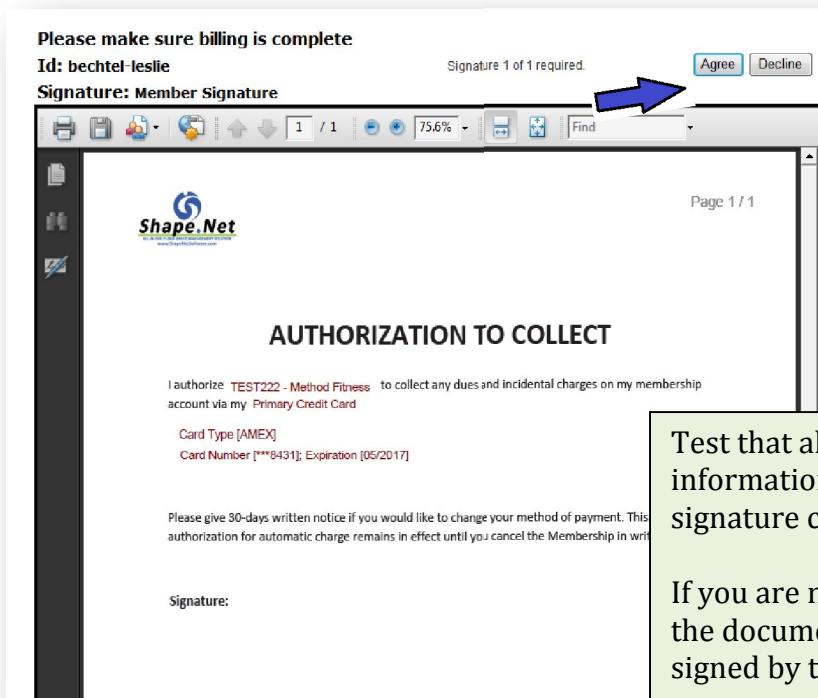
Services	Schedule	User Info	...
C_SpringU 360.00	10/1/2012 9:00 AM Bootcamp Trainer: balanick-Stephanie	Active Card ID: lesliebechtel Last Chkin: 9/20/2012 5:41:40 PM	Email: lbechtel@shapenetsof Work: Cell: 1234567890

Id: bechtel-leslie
 To ADD more:

Select Facility Document

Click sign next to the document you are testing.

Available Documents		
ACTIONS	Title	Category
Sign	EFT Authorization	Other
Sign	Liability Waiver	Other
view	Security	Other



Test that all fields are filling with the correct information and choose Agree to test the signature capture.

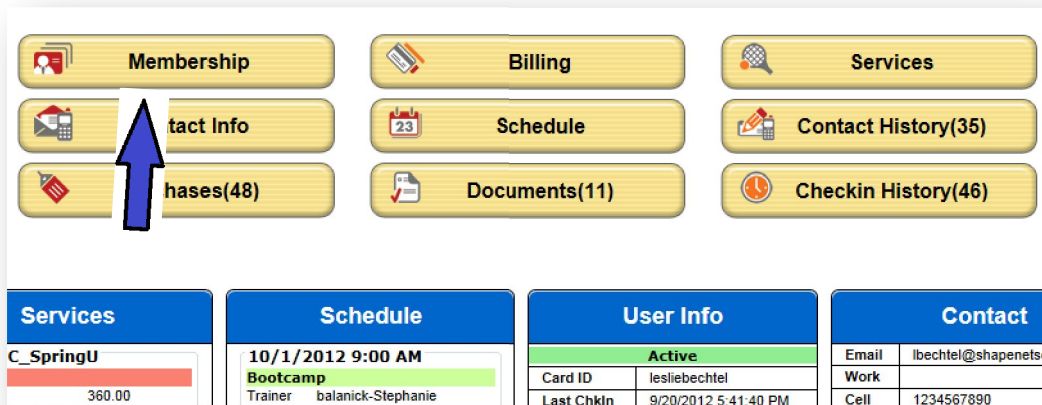
If you are not using the signature pad feature, the document can be printed at this point and signed by the client.



The signature prompt will look like this if the signature is being captured properly. Please click Submit after signing.

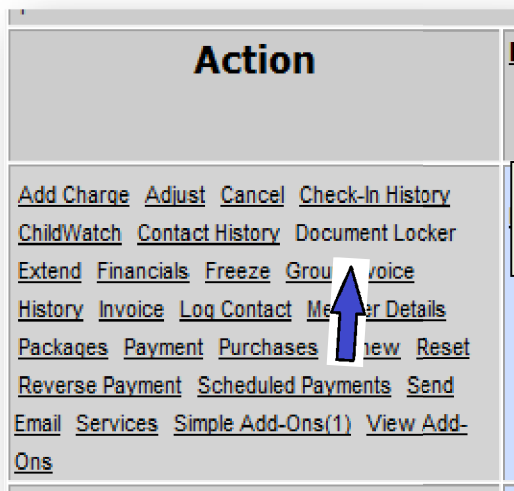
Membership Agreements

These documents pull specific membership information into the contract.



Services	Schedule	User Info	Contact
C_SpringU 360.00	10/1/2012 9:00 AM Bootcamp Trainer balanick-Stephanie	Active Card ID lesliebechtel Last Chkin 9/20/2012 5:41:40 PM	Email lbechtel@shapenetsof Work Cell 1234567890

Again start at the Home Search option but choose **MEMBERSHIP** at the client details page.



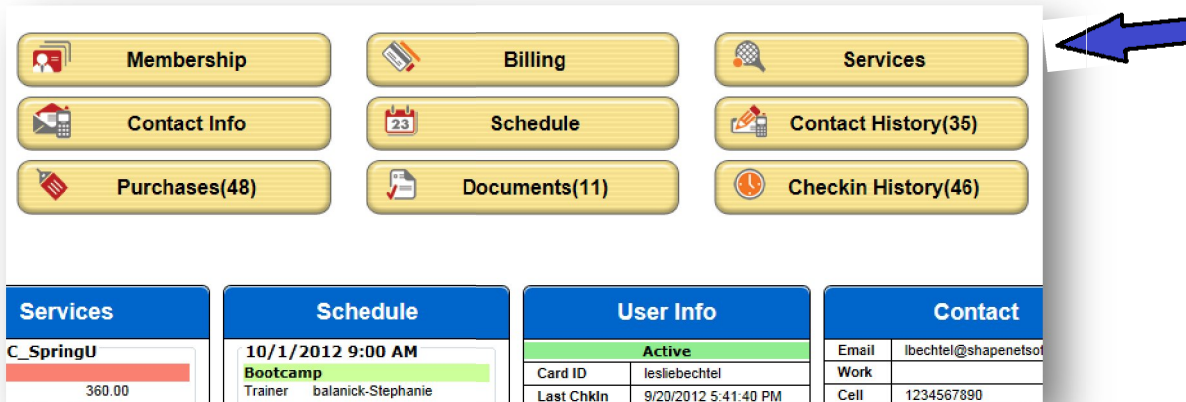
Action

- [Add Charge](#)
- [Adjust](#)
- [Cancel](#)
- [Check-In History](#)
- [ChildWatch](#)
- [Contact History](#)
- [Document Locker](#)
- [Extend](#)
- [Financials](#)
- [Freeze](#)
- [Group](#)
- [Invoice](#)
- [History](#)
- [Invoice](#)
- [Log Contact](#)
- [Member Details](#)
- [Packages](#)
- [Payment](#)
- [Purchases](#)
- [New](#)
- [Reset](#)
- [Reverse Payment](#)
- [Scheduled Payments](#)
- [Send](#)
- [Email](#)
- [Services](#)
- [Simple Add-Ons\(1\)](#)
- [View Add-Ons](#)

Click Document Locker and follow the steps as outlined on page 1 above.

Service Agreements

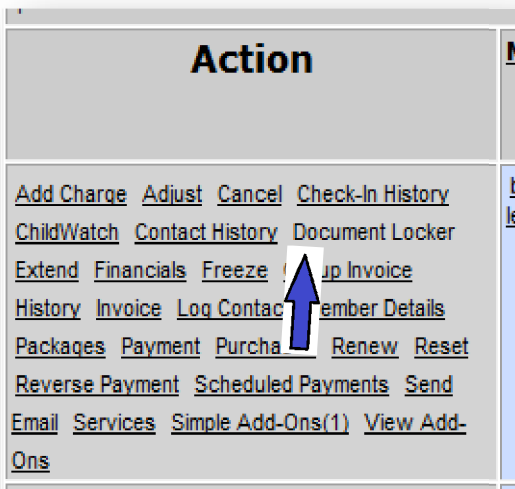
These documents pull specific Service Package information into the contract.



The screenshot shows a client details page with several navigation buttons: Membership, Billing, Services, Contact Info, Schedule, Contact History(35), Purchases(48), Documents(11), and Checkin History(46). Below these are four data tables: Services, Schedule, User Info, and Contact.

Services	Schedule	User Info	Contact
C_SpringU 360.00	10/1/2012 9:00 AM Bootcamp Trainer balanick-Stephanie	Active Card ID leslebechtel Last ChKn 9/29/2012 5:41:40 PM	Email lbechtel@shapenetso Work Cell 1234567890

Again start at the Home Search option but choose **Services** at the client details page.



The screenshot shows a list of actions available for a client. A blue arrow points to the 'Document Locker' option.

Click Document Locker and follow the steps as outlined on page 1 above.

Security Adjustments

To turn on permissions for an administrator to adjust document settings:

Functions -> Users -> View Administrators -> locate Administrator; select Security from the Actions Column.
Expand Functions, expand Documents, and check all that apply.