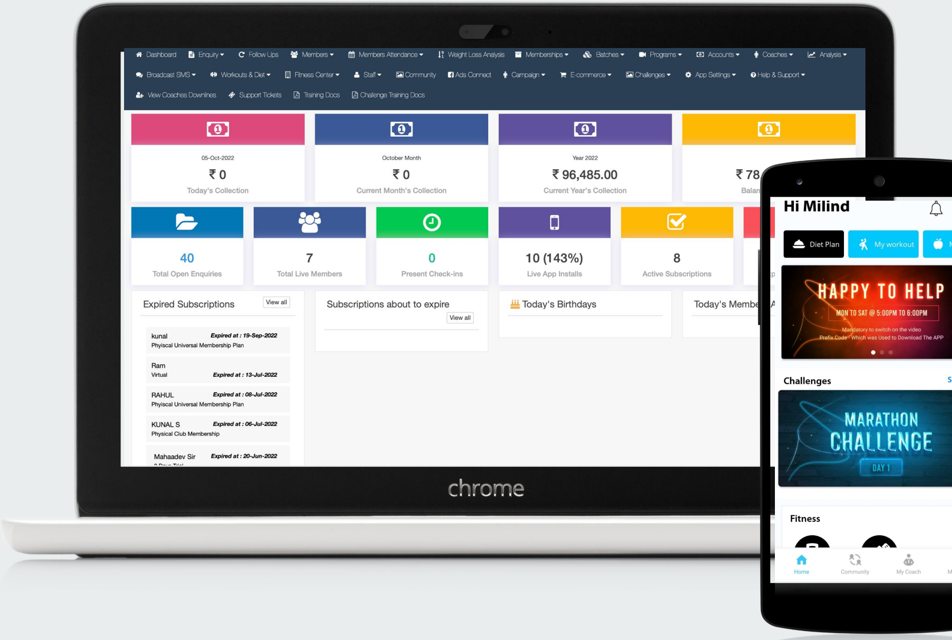
# YDL WELLNESS CRM

## Getting Started - For Admin/Club Owners

## MODULE 1



# Add your data

STEP 1 : Add Membership Plans

STEP 2 : Add Programs

STEP 3 : Add Batches

Step 4 : Add Coaches

Step 5 : Send Coach Creds to your respective Coaches.

Step 6 : Upload your clients data

Step 7: Add Staff User/Admin Panel Users

# STEP 1:
# Add Membership plans

**The Very First step for all the Admin Club Owners is to add their membership plans.**

Admin Login URL:

https://www.herbalife.yourdigitallift.com/fitness-center/login/

The Owners should login to their panels and Click on Membership -> Membership Plans -> Create Memberships

**These memberships will be visible to your coaches in their coach dashboard. The Coaches can assign these membership to their clients and create bills.**

**Membership plans can be created as given examples below**

1. Happy to Help
2. Virtual Universal Members

**Please follow the given video below to add subscription.**

https://www.youtube.com/watch?v=safuBK_2lOo&ab_channel=YourDigitalLift

(298) WhatsApp | YDL Registered Logo - aniruddha | YDL WELLNESS CRM - CLUB OWI | YourDigitalLift | New Tab

herbalife.yourdigitallift.com/merchant/fitness-center/membership-plan/

Dashboard | Enquiry | Follow Ups | Members | Members Attendance | Weight Loss Analys | Memberships | Batches | Programs | Accounts | Coaches | Analysis

Broadcast SMS | Workouts & Diet | Fitness Center | Staff | Community | Ads Connect | merce | App Settings | Help & Support

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Happy to Help( free trail) | YD-9283 | Maa Tarini Nutrition Point | Personal Training | Active | 1 Days | ₹ 0 | ₹ | SUMANTA KUMAR PRADHAN | View Edit |

## Paid Memberships

| | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | Happy to Help( free trail) | YD-9283 | Maa Tarini Nutrition Point | Personal Training | Active | 1 Days | ₹ 0 | ₹ | SUMANTA KUMAR PRADHAN | View Edit |
| | 3 DAY TRAIL MEMBERSHIP | YD-10229 | Maa Tarini Nutrition Point | Personal Training | Active | 2 Days | ₹ 800 | ₹ | SUMANTA KUMAR PRADHAN | View Edit |
| | PHYSICAL UNIVERSAL MEMBERSHIP | YD-8553 | Maa Tarini Nutrition Point | Personal Training | Active | 29 Days | ₹ 6400 | ₹ | SUMANTA KUMAR PRADHAN | View Edit |
| | Virtual Universal Membership | YD-8550 | Maa Tarini Nutrition Point | Personal Training | Active | 29 Days | ₹ 6969 | ₹ | SUMANTA KUMAR PRADHAN | View Edit |



9920755049 info@yourde

WhatsApp Image....jpeg | YDL Registered logo.jpg | Show all

29°C Smoke | ENG IN | 09:25 PM 25-03-2022

# Step 2:
# Add Programs

## Add all of your programs.

Programs are where you can add your all of daily sessions and start the session from the panel.

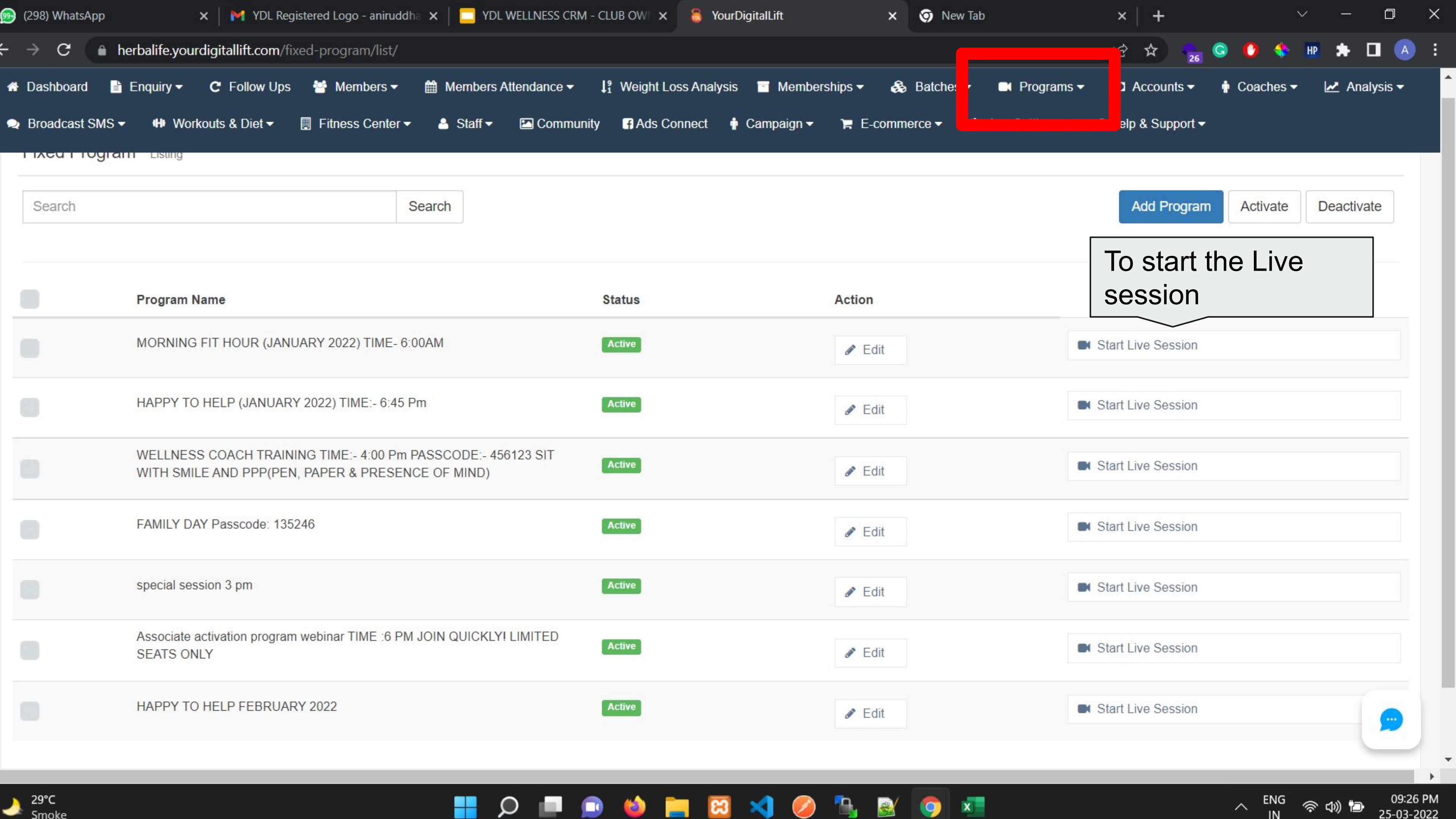
**Once you start the session all of your clients will get the notification and their attendance will be marked.**

## Programs are example as below

1. MORNING FIT HOUR (JANUARY 2022) TIME- 6:00AM
2. HAPPY TO HELP (JANUARY 2022) TIME:- 6:45 Pm

## To add a program

1. Goto Programs
2. Add Programs
3. Enter the Program Name, Zoom Meeting link
4. Select the days of the Program and time
5. Click on save & close


herbalife.yourdigitallift.com/fixed-program/list/
Dashboard
Enquiry
Follow Ups
Members
Members Attendance
Weight Loss Analysis
Memberships
Programs
Accounts
Coaches
Analysis
Broadcast SMS
Workouts & Diet
Fitness Center
Staff
Community
Ads Connect
Campaign
E-commerce
Search
Add Program
Activate
Deactivate
To start the Live session
Program Name
Status
Action
MORNING FIT HOUR (JANUARY 2022) TIME- 6:00AM
Active
Edit
Start Live Session
HAPPY TO HELP (JANUARY 2022) TIME:- 6:45 Pm
WELLNESS COACH TRAINING TIME:- 4:00 Pm PASSCODE:- 456123 SIT WITH SMILE AND PPP(PEN, PAPER & PRESENCE OF MIND)
FAMILY DAY Passcode: 135246
special session 3 pm
Associate activation program webinar TIME :6 PM JOIN QUICKLY! LIMITED SEATS ONLY
HAPPY TO HELP FEBRUARY 2022

# Step 3
# Add Batches

## Add batches

Batches help you create groups of your Clients, coaches, Supervisors etc.

**While going live , you can select these batches and go live with only those clients.**

**You can also view attendance according to thoses batches.**

## Batches are example as below

1. FIT HOUR
2. VIRTUAL CLUB
3. Supervisor and above

## Please follow the give video below

https://www.youtube.com/watch?v=SoeUlHoM_wQ

(298) WhatsApp | YDL Registered Logo - aniru | YDL WELLNESS CRM - CLUB | YourDigitalLift | Creating Batch - YouTube | New Tab

herbalife.yourdigitallift.com/fitness-center/batch/batch-list/

Dashboard | Enquiry | Follow Ups | Members | Members Attendance | Weight Loss Analysis | Memberships | Batches | Programs | Accounts | Coaches | Analysis

Broadcast SMS | Workouts & Diet | Fitness Center | Staff | Community | Ads Connect | Campaign | Settings | Help & Support

Search | Search

View Batchwise Members | Add Batch | Activate | Deactivate | Delete

| | Batch Name | Start Time | End Time | Trainers | Days | Action |
|---|---|---|---|---|---|---|
| | FIT HOUR Active Batch-1391 | 6 a.m. | 7 a.m. | SUMANTA KUMAR PRADHAN | Monday,Tuesday,Wednesday,Thursday,Friday,Saturday,Sunday | Edit |
| | PHYSICAL CLUB Active Batch-1313 | 6 a.m. | 8:30 p.m. | SUMANTA KUMAR PRADHAN , Sumit Kumar | Monday,Tuesday,Wednesday,Thursday,Friday,Saturday,Sunday | Edit |
| | VIRTUAL CLUB Active Batch-1314 | 6 a.m. | 8:30 p.m. | SUMANTA KUMAR PRADHAN | Monday,Tuesday,Wednesday,Thursday,Friday,Saturday,Sunday | Edit |
| | MIW/WLP Active Batch-1315 | 5:30 p.m. | 7 a.m. | SUMANTA KUMAR PRADHAN | Tuesday,Saturday | Edit |
| | WELLNESS COACH Active Batch-1318 | 2:15 p.m. | 6:30 a.m. | SUMANTA KUMAR PRADHAN | Sunday | Edit |

Supervisor and above

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# Step 4
# Add Coaches

## Add Coaches

The Next step is to add your Coaches

**When you add your coaches in the system, each coach gets a unique Referral Code.**

**The Coach can share this code with his clients on onboarding.**

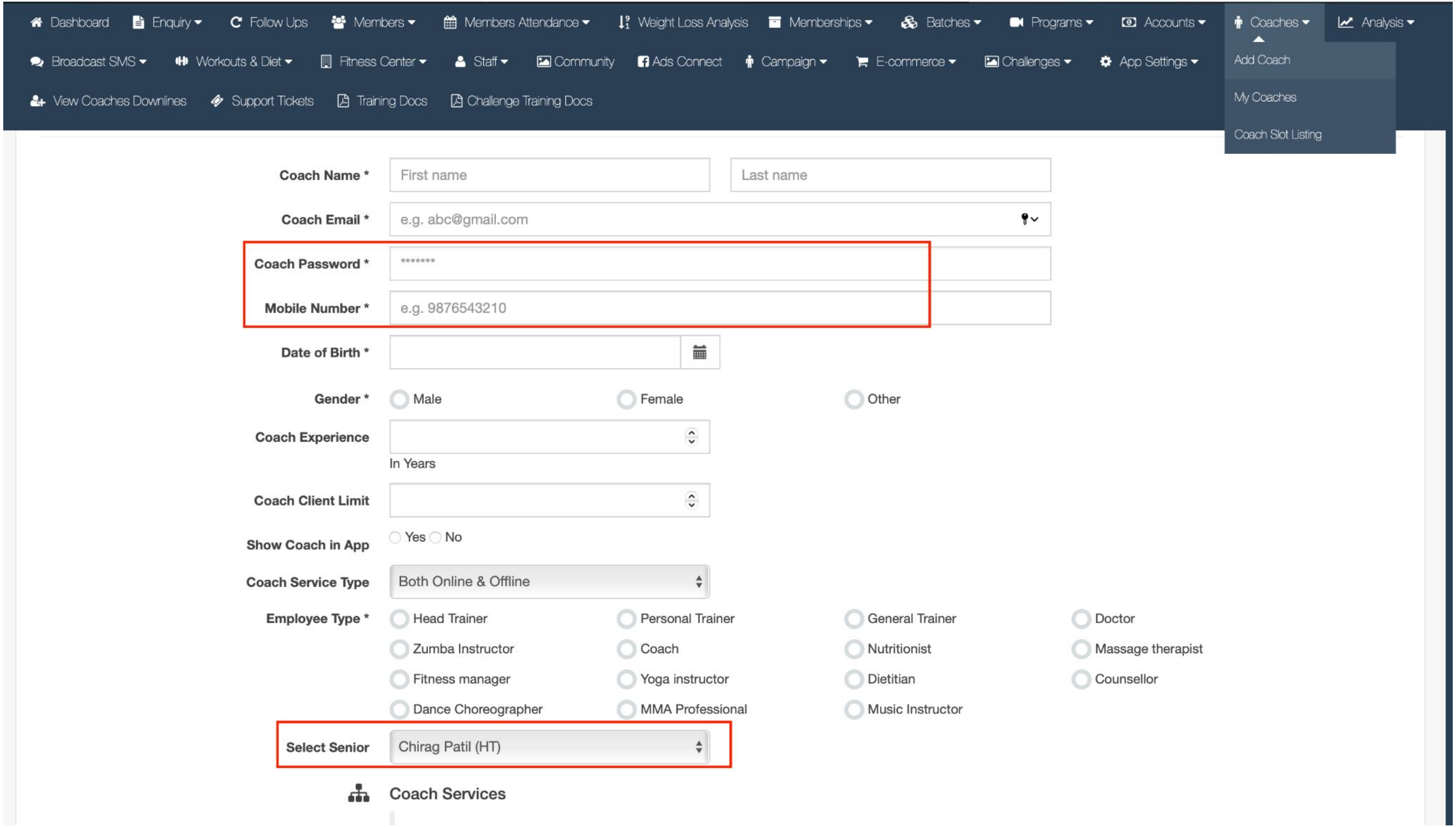
**While adding a coach, you can assign their upline coach as well**

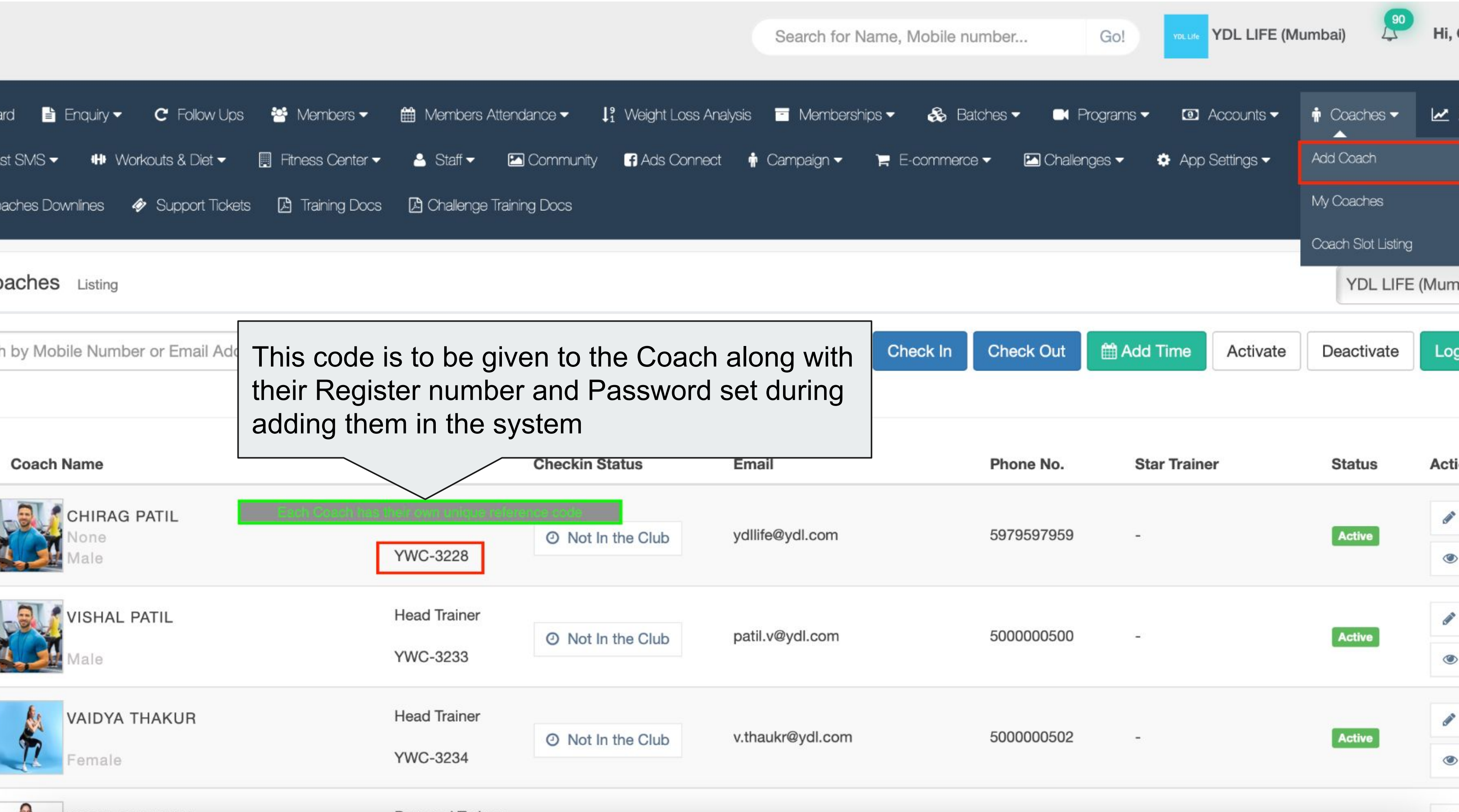
## How to add a coach

1. Go to Coaches.
2. Go to Add Coach
3. Fill all mandatory field (marked with * ).
4. Click on Save & Next.

## Please follow the give video below

https://www.youtube.com/watch?v=tRxWgzWaJi4


Dashboard
Enquiry
Follow Ups
Members
Members Attendance
Weight Loss Analysis
Memberships
Batches
Programs
Accounts
Coaches
Analysis
Broadcast SMS
Workouts & Diet
Fitness Center
Staff
Community
Ads Connect
Campaign
E-commerce
Challenges
App Settings
View Coaches Downlines
Support Tickets
Training Docs
Challenge Training Docs
Add Coach
My Coaches
Coach Slot Listing
Coach Name *
First name
Last name
Coach Email *
e.g. abc@gmail.com
Coach Password *
*******
Mobile Number *
e.g. 9876543210
Date of Birth *
Gender *
Male
Female
Other
Coach Experience
In Years
Coach Client Limit
Show Coach in App
Yes
No
Coach Service Type
Both Online & Offline
Employee Type *
Head Trainer
Personal Trainer
General Trainer
Doctor
Zumba Instructor
Coach
Nutritionist
Massage therapist
Fitness manager
Yoga instructor
Dietitian
Counsellor
Dance Choreographer
MMA Professional
Music Instructor
Select Senior
Chirag Patil (HT)
Coach Services



Search for Name, Mobile number...
Go!
YDL LIFE (Mumbai)
90
Hi,
Enquiry
Follow Ups
Members
Members Attendance
Weight Loss Analysis
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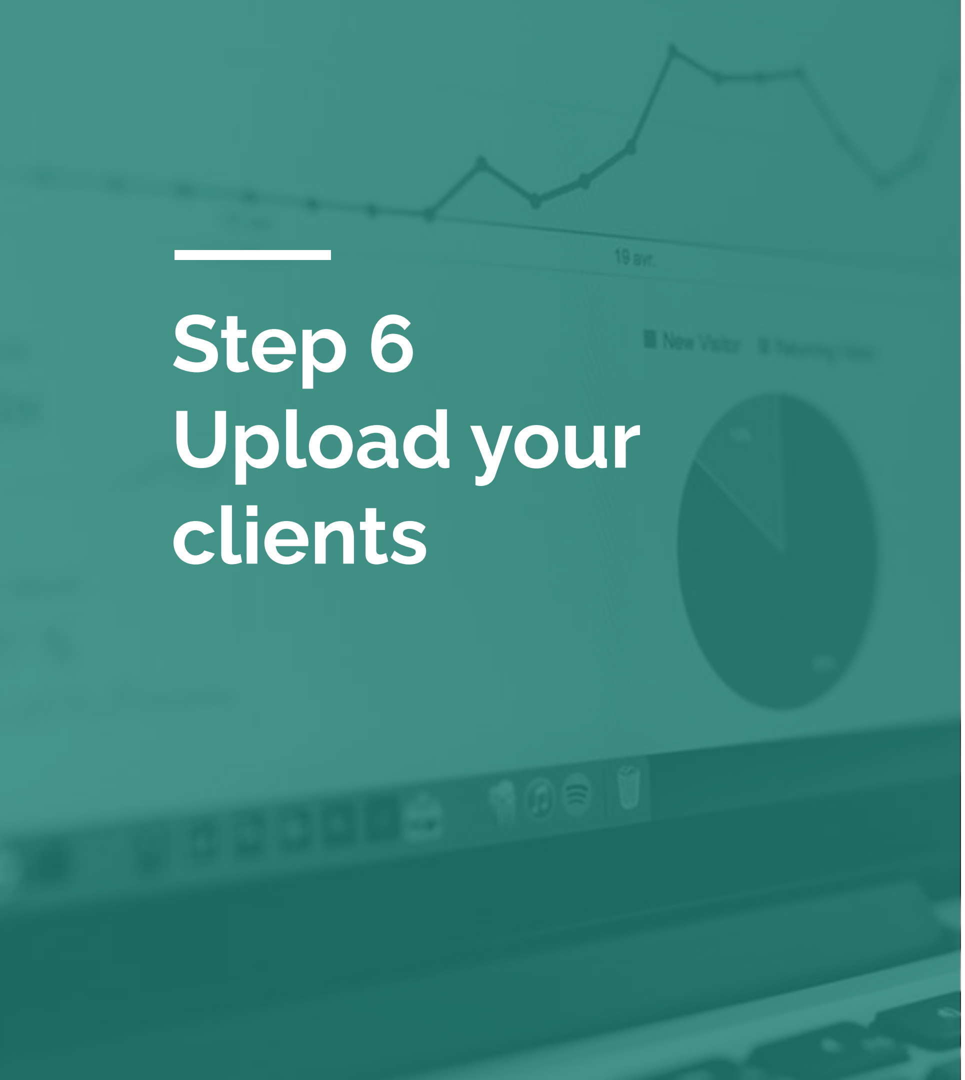
Batches
Programs
Accounts
Coaches
Workouts & Diet
Fitness Center
Staff
Community
Ads Connect
Campaign
E-commerce
Challenges
App Settings
Add Coach
My Coaches
Coach Slot Listing
Support Tickets
Training Docs
Challenge Training Docs
Listing
YDL LIFE (Mum
Check In
Check Out
Add Time
Activate
Deactivate
This code is to be given to the Coach along with their Register number and Password set during adding them in the system
Each Coach has their own unique reference code
Coach Name
Checkin Status
Email
Phone No.
Star Trainer
Status
CHIRAG PATIL
None
Male
YWC-3228
Not In the Club
ydllife@ydl.com
5979597959
Active
VISHAL PATIL
Male
Head Trainer
YWC-3233
Not In the Club
patil.v@ydl.com
5000000500
Active
VAIDYA THAKUR
Female
Head Trainer
YWC-3234
Not In the Club
v.thaukr@ydl.com
5000000502
Active

# Step 5
# Send Coaches Creds

## Send Coach Credentials

The next step is to send the credentials to all of you coaches along with your

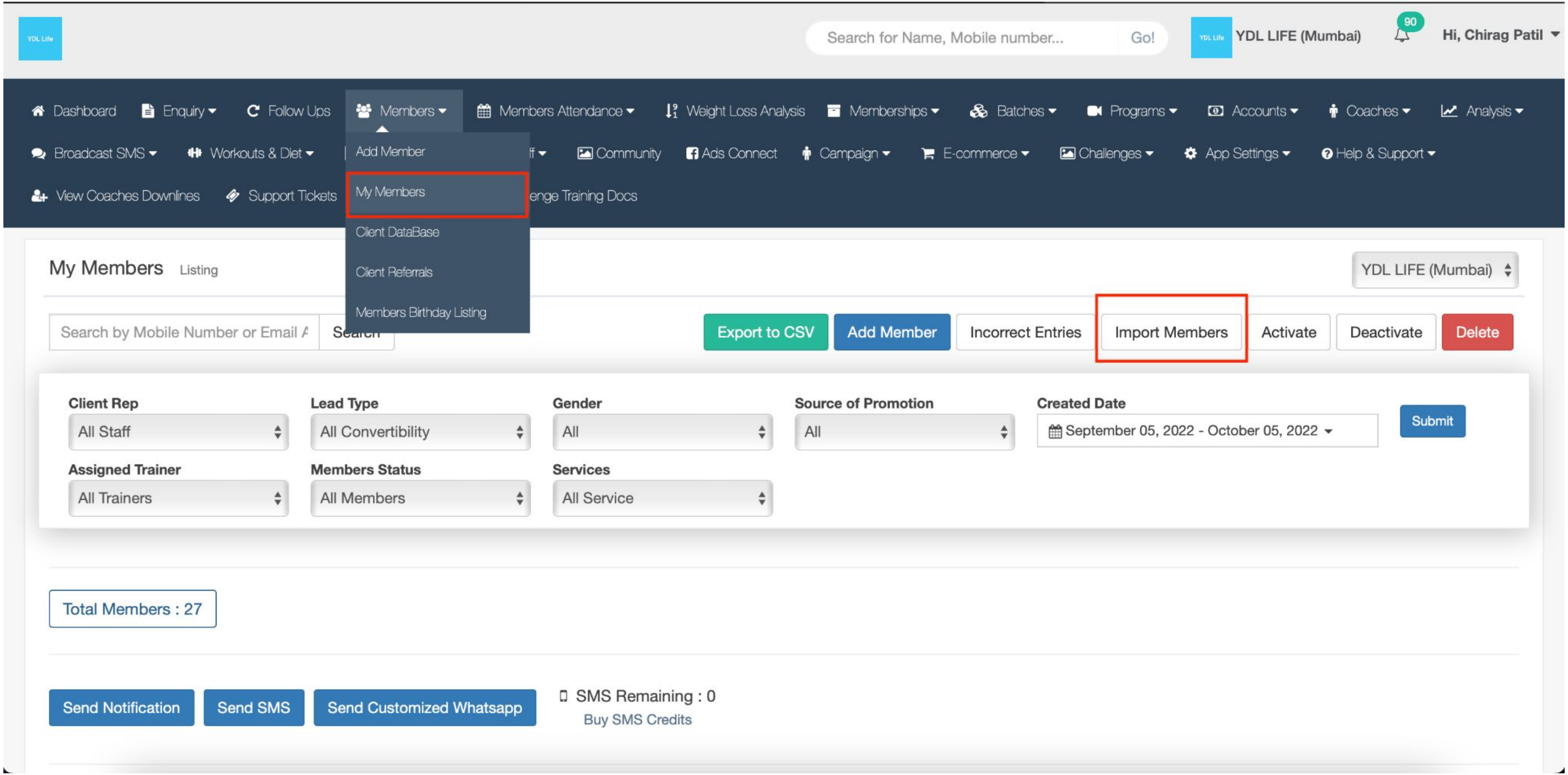
1. Coach App link (https://play.google.com/store/apps/details?id=com.ydl.nutriloverscoach&hl=en_IN&gl=US)
2. Coach Dashboard link (https://www.herbalife.yourdigitallift.com/trainer-dashboard/login/)
3. Coach Referral Code
4. Username & Password



# Step 6 Upload your clients

## Add Your Clients

1. You can upload all your clients at once by uploading a csv file
2. CSV format is https://drive.google.com/file/d/1JJ99Mg3bYVcKkYoOcslxoO5-RB4hcJEv/view?usp=sharing
3. Once the data has been filled in the csv, you can upload it directly to dashboard or contact YDL rep for assistance
4. To upload directly from Admin dashboard, go to Members -> My Members -> Click on import members buttons and upload the csv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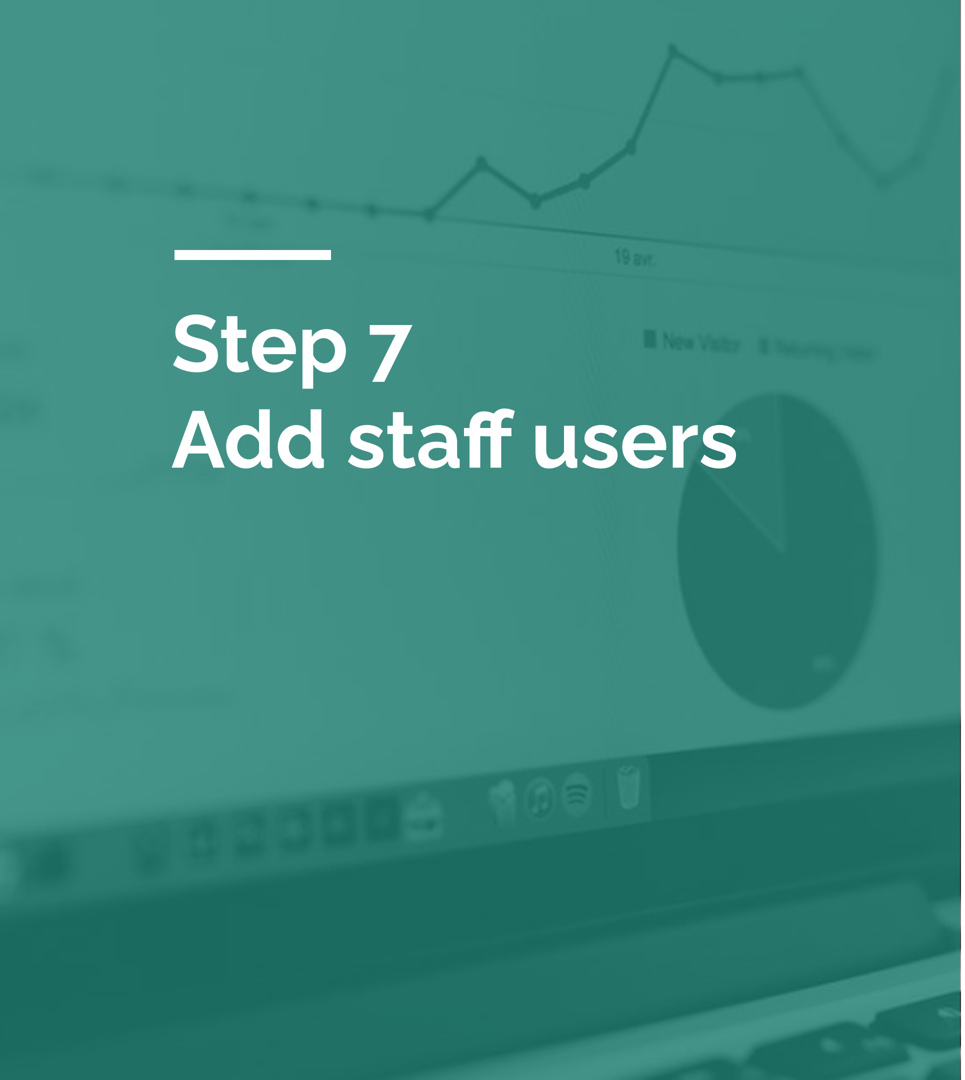
Support Tickets
enge Training Docs
Add Member
My Members
Client DataBase
Client Referrals
Members Birthday Listing
My Members Listing
YDL LIFE (Mumbai)
Search by Mobile Number or Email A
Export to CSV
Add Member
Incorrect Entries
Import Members
Activate
Deactivate
Delete
Client Rep
All Staff
Lead Type
All Convertibility
Gender
All
Source of Promotion
All
Created Date
September 05, 2022 - October 05, 2022
Submit
Assigned Trainer
All Trainers
Members Status
All Members
Services
All Service
Total Members : 27
Send Notification
Send SMS
Send Customized Whatsapp
SMS Remaining : 0
Buy SMS Credits

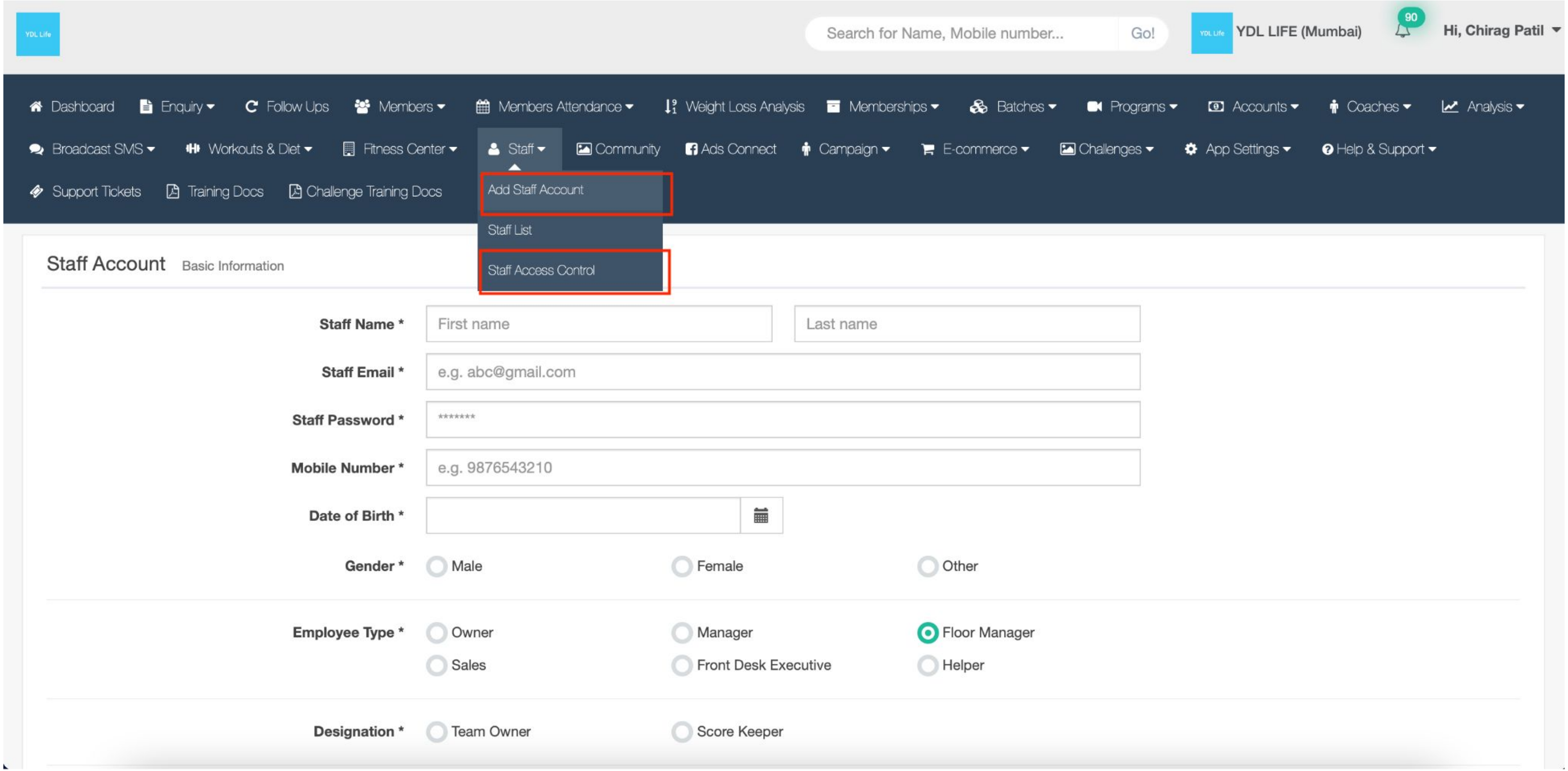



# Step 7
# Add staff users

## Add your admin panel users

It can be your supervisors, co-owners, challenge captains, admin team, etc; anyone to whom you want to grant access for the dashboard with specific access control

1. You can set your access controls, employee type wise
2. Go to admin dashboard -> Staff -> Add staff to add new staff
3. Select appropriate employee type, for team owner(captains) select floor manager -> Team Owner
4. To set access control, go to admin dashboard -> Staff -> Staff Access Control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Campaign
E-commerce
Challenges
App Settings
Help & Support
Support Tickets
Training Docs
Challenge Training Docs
Add Staff Account
Staff List
Staff Access Control
Staff Account
Basic Information
Staff Name *
First name
Last name
Staff Email *
e.g. abc@gmail.com
Staff Password *
*******
Mobile Number *
e.g. 9876543210
Date of Birth *
Gender *
Male
Female
Other
Employee Type *
Owner
Manager
Floor Manager
Sales
Front Desk Executive
Helper
Designation *
Team Owner
Score Keeper

YDL Life

Search for Name, Mobile number... Go!

YDL Life YDL LIFE (Mumbai) 90 Hi, Chirag Patil

Dashboard | Enquiry | Follow Ups | Members | Members Attendance | Weight Loss Analysis | Memberships | Batches | Programs | Accounts | Coaches | Analysis | Broadcast SMS | Workouts & Diet | Fitness Center | Staff | Community | Ads Connect | Campaign | E-commerce | Challenges | App Settings | Help & Support | Support Tickets | Training Docs | Challenge Training Docs

- Add Staff Account
- Staff List
- Staff Access Control

## Staff Accounts Access Control Listing

| Operations/Employee | Manager | Floor Manager | Receptionist | Sales | Helper |
|---|---|---|---|---|---|
| **Enquiry & Follow Ups** | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete |
| **Members** | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete | ☑ Add<br>☑ Edit<br>☑ Delete |
| **Traffic Insight** | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Members Insight** | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Subscription Insight** | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Bounced Insight** | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Notices**<br>**(Add/Edit/View/Send Notification)** | ☑ | ☑ | ☑ | ☑ | ☑ |
| **Membership Plans & Packages**<br>**(Create/Edit/View)** | ☑ Add<br>☑ Edit | ☑ Add<br>☑ Edit | ☑ Add<br>☑ Edit | ☑ Add<br>☑ Edit | ☑ Add<br>☑ Edit |