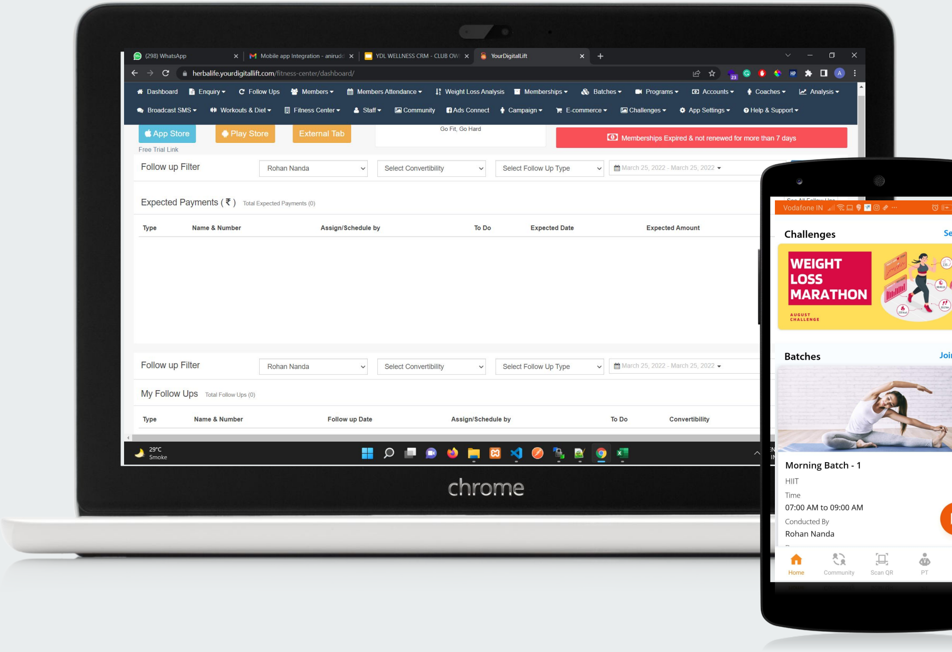
YOUR DIGITAL LIFT

YDL WELLNESS CRM

Getting Started - For Coaches



Outline

STEP 1 : Login to APP/Dashboard

STEP 2 : Update your Profiles

STEP 3 : Get your Clients on-board

Step 4 : Add Subscriptions

STEP 1:
Login to Coach APP/ Dashboard

The Very First step for all the Coaches is to login to their Coach Application.

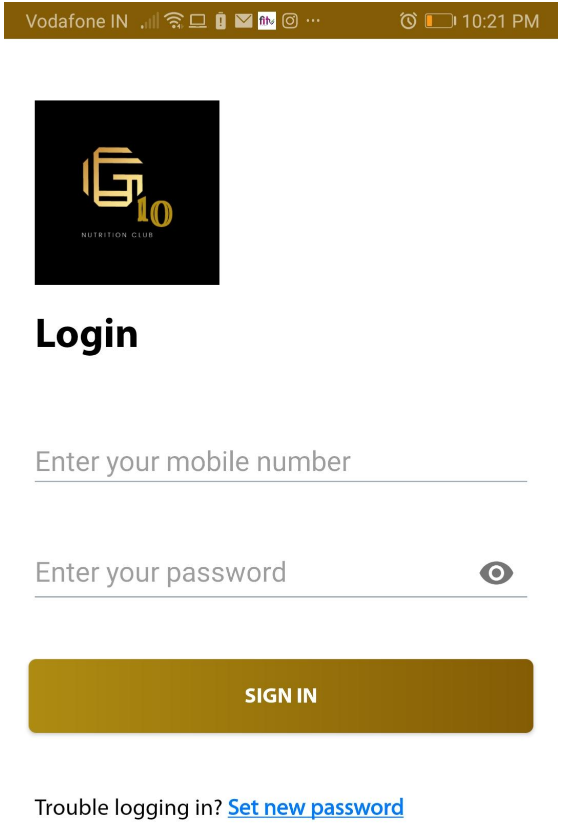
The Coach application URL is to be fetched from their respective Club Owners

Request your Club owners with the Below details

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

Steps to Login

1. Open your Coach Application
2. Enter your registered Mobile number
3. Enter your Password give to you by your Club owner
4. Click on Sign in Button



Step 2:
Update Profile

Coaches need to update their profiles by adding their

1. Certificates
2. Awards
3. Transformations
4. And other Basic details

Steps to Update profile

Follow the given video link Below

https://www.youtube.com/watch?v=y4Ti5e9XZc0

1. Go to Profile.

2. Certifications section:Tap on Add New.

3. Upload Image.

4. Allow permission.

5. Enter Title.

6. Submit.

7. Awards Section: Tap on Add New.

8. Upload Image.

9.Allow permission

10. Enter Title.

11. Submit.

12. Go to View Transformation.

13. Add Transformation.

14. Upload Image.

15. Allow permission

16. Enter Client Name and Required data.

17. Submit.

Step 3:
Get your Clients on-board

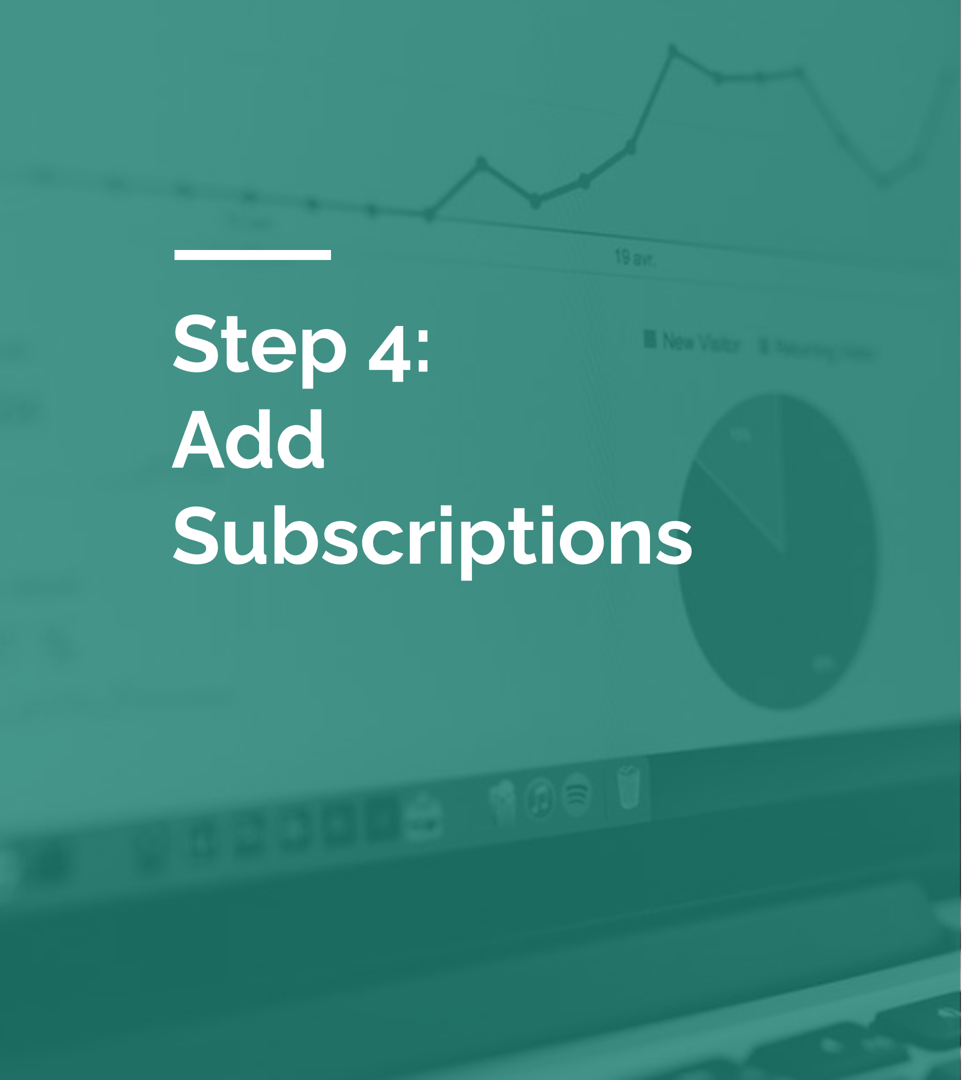
Getting you clients on-board is a very important step

To get your clients on board follow the given steps below:

1. Send you **Customer App Link** to your clients along with your **Referral Code**
2. Ask you Clients to Download the App and Click on Signup.
3. While Sign up ,ask your clients to enter your **EXACT Referral Code.**

For Better Guidance please send the below video link to your clients.

https://youtu.be/edhG5TjQu8Y



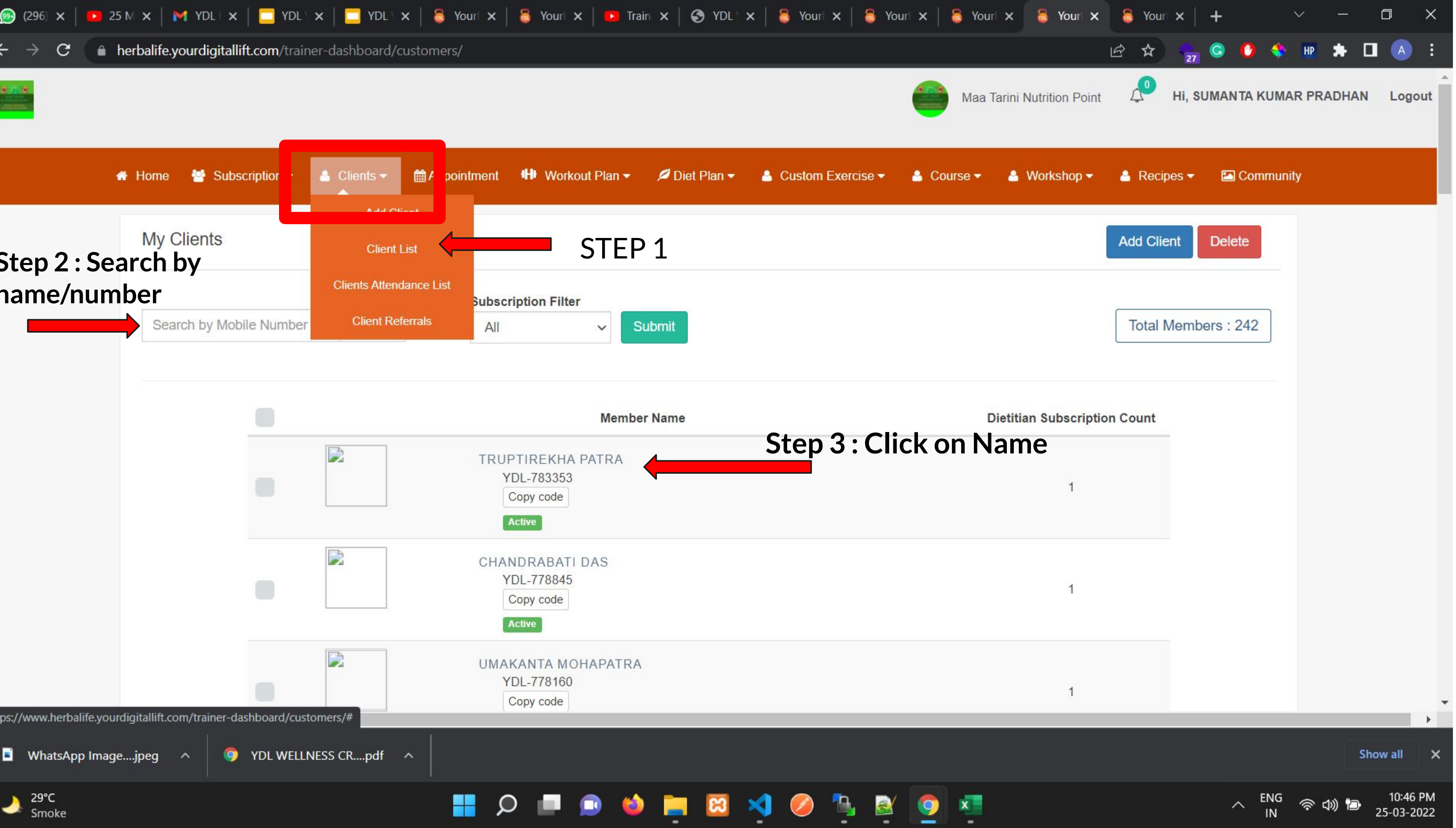
Step 4: Add Subscriptions

Once your Clients are on board you need to give them access for the application and create their bills

To give them access to the entire application you will need to add their billing information in the system.

How to create a bill or Give Access to the Application to Clients?

1. Go to https://www.herbalife.yourdigitallift.com/trainer-dashboard/login/
2. Enter your Login details
3. Select your Wellness Center
4. Go to Clients -> Clients List
5. Search for the Client for whom you want to add the bill
6. Click on the Name of the Client in the listing, you will be redirect to clients profile
7. Click on Add Subscription Button. A pop up will appear
8. Select Membership from the Drop down
9. Enter the Selling price
10. Select the Batch and click on Add Subscription Button.
11. You will be redirected to your Payment page.
12. Scroll Down , Select Payment Status as Paid from the Dropdown and Click on submit button.


herbalife.yourdigitallift.com/trainer-dashboard/customers/
Maa Tarini Nutrition Point
Hi, SUMANTA KUMAR PRADHAN
Logout
Home
Subscription
Clients
Appointment
Workout Plan
Diet Plan
Custom Exercise
Course
Workshop
Recipes
Community
Client List
Clients Attendance List
Client Referrals
STEP 1
My Clients
Step 2 : Search by name/number
Search by Mobile Number
Subscription Filter
All
Submit
Add Client
Delete
Total Members : 242
Member Name
Dietitian Subscription Count
Step 3 : Click on Name
TRUPTIREKHA PATRA
YDL-783353
Copy code
Active
1
CHANDRABATI DAS
YDL-778845
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Active
1
UMAKANTA MOHAPATRA
YDL-778160
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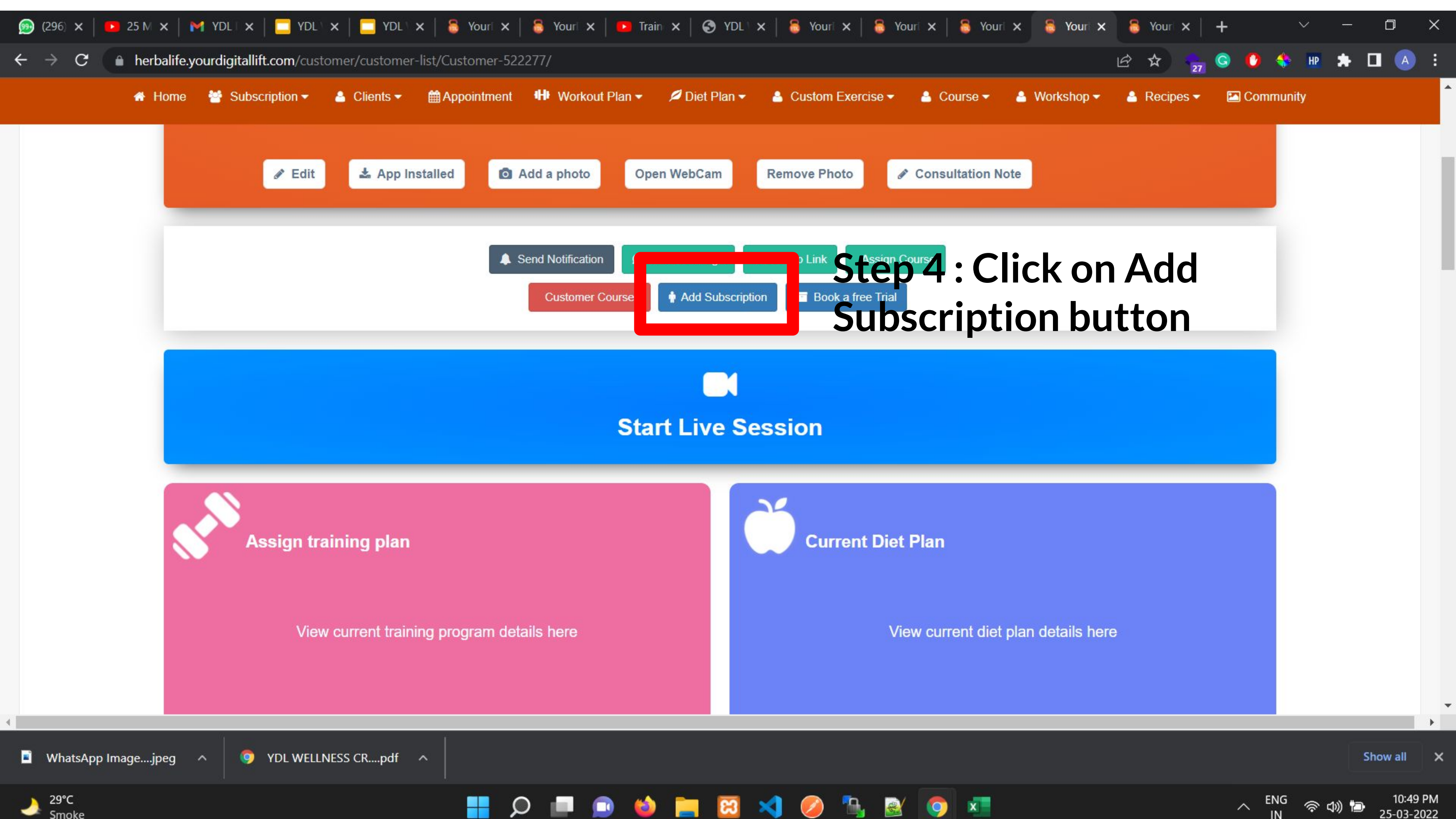
Step 4 : Click on Add Subscription button



herbalife.yourdigitallift.com/customer/customer-list/Customer-522277/

Home | Subscripti | Recipes | Community

Select the Customer's Membership plan.

Select Membershi Happy to Help(free trail) (1 Days)

The selected membership plan has a tenure of **1 Days** for the categories **Personal Training**.

Assign Dietitian* SUMANTA KUMAR PRADHAN (TT-3246)

Assign Secondary Trainer
JAGYASENI KUJUR (TT-3405)
Laxmidhar Ghivela (TT-3331)
Minakshi Pradhan (TT-3453)
MITHUN SAHOO (TT-3451)

Hold down "Control", or "Command" on a Mac, to select more than one.

Total Sessions 1

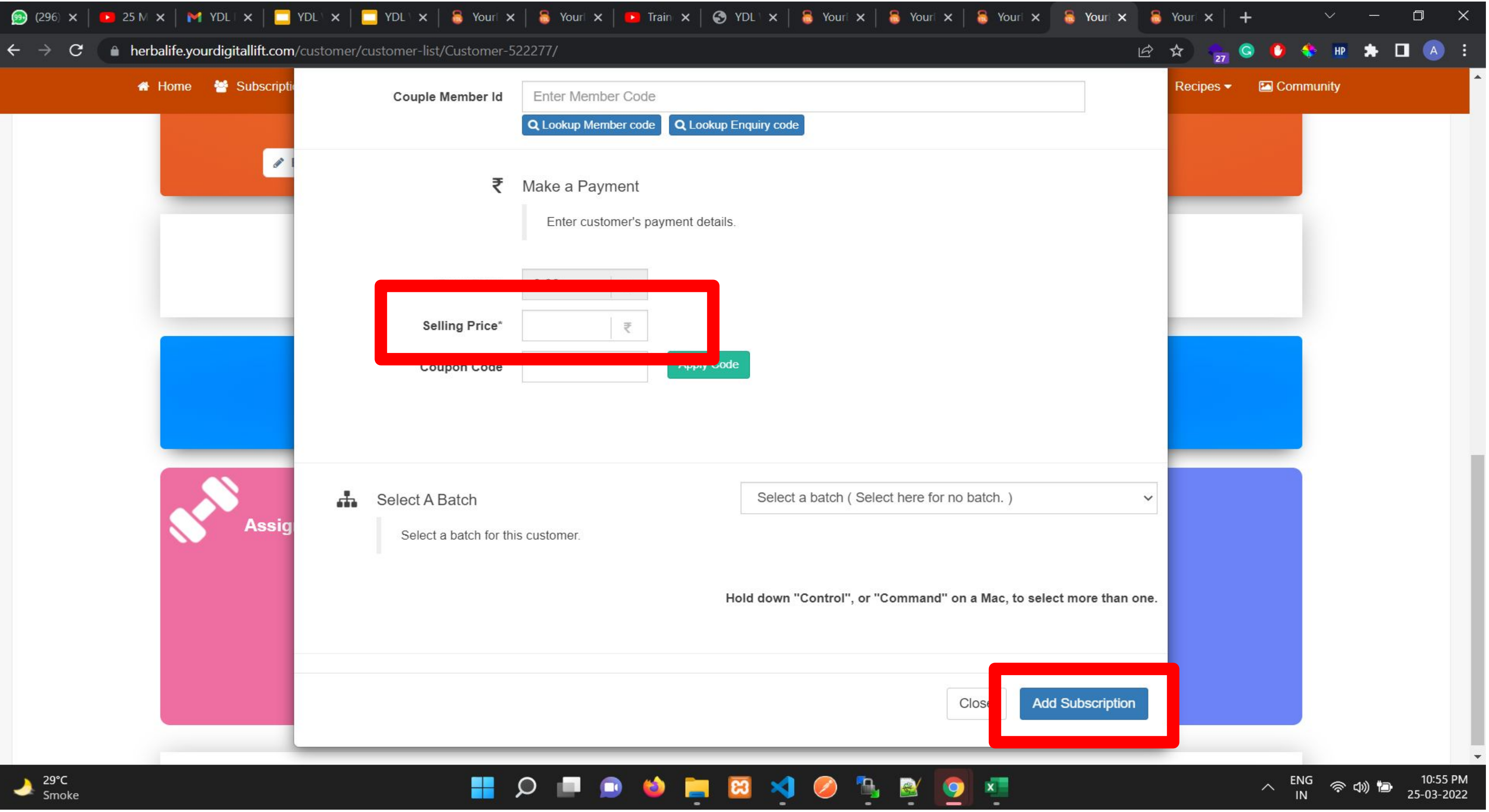
Joining Date

Customer is already subscribed to the above selected membership, which is going to expire on **26-03-2022**.
Make sure you enter **26-03-2022** as the customer's start date.

Start Date 26-03-2022

End Date 27-03-2022

29°C Smoke | ENG IN | 10:52 PM 25-03-2022


herbalife.yourdigitallift.com/customer/customer-list/Customer-522277/
Home
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Recipes
Community
Couple Member Id
Enter Member Code
Lookup Member code
Lookup Enquiry code
₹
Make a Payment
Enter customer's payment details.
Selling Price*
₹
Coupon Code
Apply Code
Select A Batch
Select a batch for this customer.
Select a batch (Select here for no batch.)
Hold down "Control", or "Command" on a Mac, to select more than one.
Close
Add Subscription
29°C
Smoke
ENG
IN
10:55 PM
25-03-2022

herbalife.yourdigitallift.com/trainer-dashboard/customer/make-payment/Customer-522277/531305/

Home | Subscription | Clients | Appointment | Workout Plan | Diet Plan | Custom Exercise | Course | Workshop | Recipes | Community

Inovice Date

25-03-2022

#	Membership	Start Date	End Date	Plan Price	Discount Amount	Net Sale Amount	GST	Total Sale Amount	Total Paid Amount	Total Balance Amount	Payment Status
1	Happy to Help(free trail)	25-03-22	26-03-22	₹ 450	₹ 0	₹ 450	₹ 0	₹ 450	₹ 0	₹ 450	Pending

Select the payment status as Paid

Receipts

#	Membership Plan	Reciept Number	Receipt Price	Receipt Date	Payment Method	Payment Status	Next Balance Due Date
1	Happy to Help(free trail)	MTN757	450.00	dd-mm-yyyy	CASH	Paid	25-03-2022

Receipt added by:

Print Receipt

Email Receipt

Notes

e.g. Cheque no./NEFT T

Make Sure you select the payment you want to edit

Submit

Click on the submit button

9920755049 info@yourdeadlift.com

Support

Please Follow the give video below on how to raise a ticket

To raise a ticket with Support Team from Admin Dashboard, please watch the video - https://youtu.be/hc8olC4PPGw