

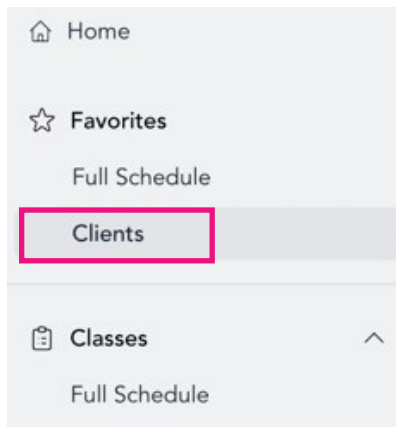


MOVE WITH LOVE

Using the Arketa Dashboard

Adding a new student in Arketa

1. Open the Move With Love (MWL) Arketa Dashboard.
2. In the left-hand navigation pane, under Favorites, click **Clients** to open the Clients page.



The Clients button in the left-hand navigation pane.

3. To add a new client, click the **Add new** button in the upper right-hand corner. This will open the **Add new client** pop-up window.



Add new button.

4. In the **Add new client** pop-up window, enter the following client information:
 - First Name
 - Last Name
 - Email
 - Phone Number

5. Click **Add new client**.
6. The new client is now listed on the Clients page. Click the new client's name to open the individual client page.
7. All new clients must sign the Liability Waiver. In the individual client page, scroll to the Documents section. Click the *** button next to Liability Waiver to open the drop-down menu.
8. Select **View unsigned waiver** on the drop-down menu. This will open the Liability Waiver in a new browser window.
9. Allow the client to sign in the signature box and select the Terms of Service and Privacy Policy check box.
10. Click **Yes, I agree**.

Adding a class pack or merchandise through the client page

1. Open the MWL Arketa Dashboard.
2. In the left-hand navigation pane, under Favorites, click **Clients** to open the Clients page.
3. Click the name of the client you wish to add a class pack or merchandise for.
4. In the left-hand navigation pane, click **New Sale** to open the New Sale navigation bar.
5. The New Sale navigation bar contains drop-down menus for:
 - Retail
 - Memberships
 - Packages
 - Bundles
 - Communities
 - Gift Cards

Navigate to the merchandise or package that the client would like to purchase, then click the desired option(s) to add them to the client's cart.

Franklin Fricano

NAME	STATUS	REMAINING	EXP / RENEWAL
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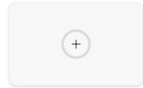
[View more](#)

Credit \$0.00

REASON	DEBIT	CREDIT	BALANCE	INVOICE	DATE
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[View more](#)

Payment Methods



Preferences

- ☐ Marketing Emails ...
- ☐ Marketing Push Notifications ...
- ☐ Marketing Texts ...

×

New Sale

Franklin Fricano

@aol.com

Q

Search by name

Retail

▼

Memberships

▼

Packages

⤴

5 PACK

Ⓞ \$90.00

10 PACK

Ⓞ \$170.00

WORKSHOP \$25

Ⓞ \$25.00

NEW STUDENT SPECIAL

Ⓞ \$30.00

SINGLE CLASS

Ⓞ \$20.00

The individual client page and the New Sale navigation bar.

6. Click **Go to payment**. Here, a gift card number or promo code can be entered.
7. Select the **Send confirmation email** check box, then click **More payment options**.
8. If the client is paying with a credit or debit card, select **Use payment terminal**.
9. Present the client with the payment terminal to complete the transaction.

Adding a client into a class

1. Open the MWL Arketa Dashboard.
2. In the left-hand navigation pane, click **Full Schedule** to open the Schedule page.
3. Click the name of the class the client is being added to.
4. In the upper right-hand corner of the class page, click the **Add new client** button.

The screenshot shows a web application interface for a yoga studio. On the left is a sidebar with navigation options: All Locations, New Sale, Home, Favorites, Clients, Classes (with sub-options: Full Schedule, Classes, Appointments, Events), Beyond Classes, Customers, Marketing, and Analytics. The main content area is titled 'Some Kinda Love (Vinyasa)' and shows the class schedule for '10:00am - 11:15am Sat, Aug 17'. Below the title, it says 'Holly Bird' and shows client counts: 6 Total, 6 Pending, 0 Checked in, 0 Waitlisted. A search bar is present with the text 'Search by name, email, or phone #'. A list of clients is displayed, each with a name, a status indicator (e.g., 'Package Low', '2 Alerts', 'Membership'), a count, and an 'Add to class' button. A red box highlights the 'Add new client' button in the top right corner.

The class page. Clients can be added to the class using the Add to class button.

5. In the pop-up window, type the name of the client in the **Search for client** search box.
6. In the **Select payment type** drop-down menu, select a new or existing package to use. To buy a new package, see the “Adding a class pack or merchandise through the client page” section.
7. Click **Add to class**.

