



What is Smartly?

Smartly is a web-based platform that gives professionals an easy way to schedule and manage appointments and classes, to receive cashless payments, and to be compensated for late cancellations and missed appointments.

It is designed for personal trainers, counsellors, make-up artists, psychotherapists, beauty therapists, nutritionists, fitness instructors — anyone whose business is based on appointments with clients or classes with a group.

You get paid via the Stripe account that Smartly automatically sets up for you during the sign-up process. And Smartly sends timely, automated appointment reminders to your clients via text. It makes managing your appointments and finances much easier.

Contents

Introduction	p.2
Sign Up	p.2
Agreements	
1. Setting up an agreement between you and your client	p.3
2. Reviewing your agreements	p.3
Classes	
1. Setting up a new class	p.4
2. Telling clients you're running a class	p.5
3. Reviewing your classes	p.6
What your Clients See in Smartly	
1. Signing up and logging in to Smartly	p.7
2. How the client accepts an agreement	p.8
3. How the client signs up to a class	p.8
How Payment Works	
1. Payment rules for agreements	p.10
2. Payment rules for classes	p.11

Introduction

There are two types of appointment on Smartly.

For Individuals: "Agreements."

An agreement is between you and an individual client for one session or more. When you've created an agreement, you use Smartly to text or email a link to the agreement for your client to review and accept on the Smartly platform.

For Class Groups: "Classes."

A class is set up for a group of people. It can be for one class or more. You use Smartly to notify people of the upcoming class(es) via email, text message, Facebook or Twitter. In all cases, Smartly provides a link that enables clients to use the platform to book and pay for their place in the class.

Sign Up

Go to smartly.ie and click the **Join Now** button.

Follow the instructions on screen to create your login details. (Smartly will send an email to confirm your email address.)

To ensure that payments are made to your bank account, Smartly will automatically set up a Stripe account for you (if you don't already have one). During the Smartly sign-up process, you'll receive an email from Stripe. Follow the instructions in the email to claim your Stripe account. (You can do this later on if you want. But you'll need to set up Stripe to receive payments from your clients.)

In Smartly, you'll now be on the Agreements screen where you can start setting up client agreements for individual sessions (p.2). If you prefer to set up classes instead, click on **Classes** in the menu on the left-hand side (p.4).

You might also want to fill in your Profile by clicking **Profile** in the main menu. Your profile includes your name; business name and description; contact information; bio; and your terms and conditions. It also shows a circular logo or image which is selected by default.

On Apple devices, the default image will be the one that appears in your Apple ID profile (if you haven't selected an image for that, Apple automatically uses your initials). For Android devices, the default image is the one that appears in your Google ID.

Agreements

1. Setting up an agreement between you and a client

Click the **+Create New Agreement** button. A window appears for entering information such as the client's name and phone number; the number of appointments and the agreed fee; and appointment cancellation terms. When you are happy with the agreement, click **Save**.



Smartly will then send a text to your client. The text contains a link where they can view the agreement and accept or decline it. If they accept, they will be prompted to enter their credit card details. (No charge is made at this point.) You will then receive a confirmation email.

You can now use Smartly to send individual appointments within the agreement. When you choose a date/time for the appointment, press **Send**.



Smartly will then send your client a second text with a new link, bringing them to a page on the Smartly platform where they can accept or decline the appointment.

Once accepted, the contract terms apply to payments and cancellations. Smartly will automatically send appointment reminders 24 hours before the agreed cancellation window. (For example, if your client is not allowed to cancel within 24 hours of the appointment, then an appointment reminder will be sent 48 hours before the appointment.)

You can learn more about how payment works on page 10.

2. Reviewing your agreements

On the agreements screen, each agreement is displayed as a tile. Agreements are organised in three categories: Active, Pending and Completed. Click on a tile to review the agreement.

It's not possible to modify an existing agreement. If you want to add more sessions, for example, simply create a new agreement for the additional sessions.

Classes

1. Setting up a new class

In the menu on the left-hand side of the screen, click **Classes**. The Classes page will appear. Now click **+Create New Class** on the right. A window will pop up for entering class details such as the class name and description; venue address; the number of sessions and their start date and frequency (weekly/monthly); the fee per session and the maximum number of attendees.

When you've entered all the information, a summary like this appears which you can save or go back and modify:

The screenshot shows a 'Create New Class' summary window. At the top, it says 'Create New Class' with a close button. Below that is a progress bar with four steps, the fourth of which is highlighted as 'Step 4'. The main content area has a dark header with a circular icon of a person on a mat, the text 'PILATES FOR BEGINNERS', and a 'PREVIEW' button. The body is divided into two columns. The left column contains 'SERVICE DETAILS' (Eight-week introduction to pilates), 'VENUE' (All Hallows College, All Hallows, Grace Park Road, Drumcondra, Dublin, D9 Ireland), 'SESSIONS' (8 sessions), and a list of sessions: SESSION 1 (Thu 7th March 2019 - 8:00 pm), SESSION 3 (Thu 21st March 2019 - 8:00 pm), and SESSION 5. The right column contains an 'UPCOMING CLASS' box with a yellow background, a circular icon, the text 'Pilates for Beginners', 'When: 8 Sessions starting 07/03/2019 @8:00 pm.', 'Price: €20 per session', and a 'SMARTLY' logo. Below this box are 'RECURRENTCE' (Weekly), 'SESSION 2' (Thu 14th March 2019 - 8:00 pm), 'SESSION 4' (Thu 28th March 2019 - 8:00 pm), and 'SESSION 6'. At the bottom are three buttons: 'CANCEL', 'PREVIOUS', and 'SAVE'.

When you're happy with the class details, click **Save**. Smartly will then give you options for sharing announcements about the class. (Note that you cannot edit/modify a class after you've created it, but you can cancel individual classes or the whole block.)

2. Telling clients you're running a class

You can share the class details via Facebook, Twitter, text message or email. You have the option to share right after setting up the class or you can click **Cancel** to do it later. When you've finished creating a class, Smartly generates a link (URL) to a page where your clients can read about and sign up for the class:

Share Class ✕

SHARE CLASS VIA...

URL

COPY LINK

EMAIL TO

CANCEL SEND EMAILS



Click the **Facebook** icon to share on Facebook. Smartly will open Facebook in a new tab in your browser. Log in and you'll automatically be on a "Share on Facebook" page, where you can choose to share the link to the class in your news feed or in your story. When you're finished, you can go back to the Smartly tab in your browser. You can either continue sharing the class in other ways, or click **Cancel** to finish up. (You have the option to come back and send out more announcements later from the class page on Smartly.)

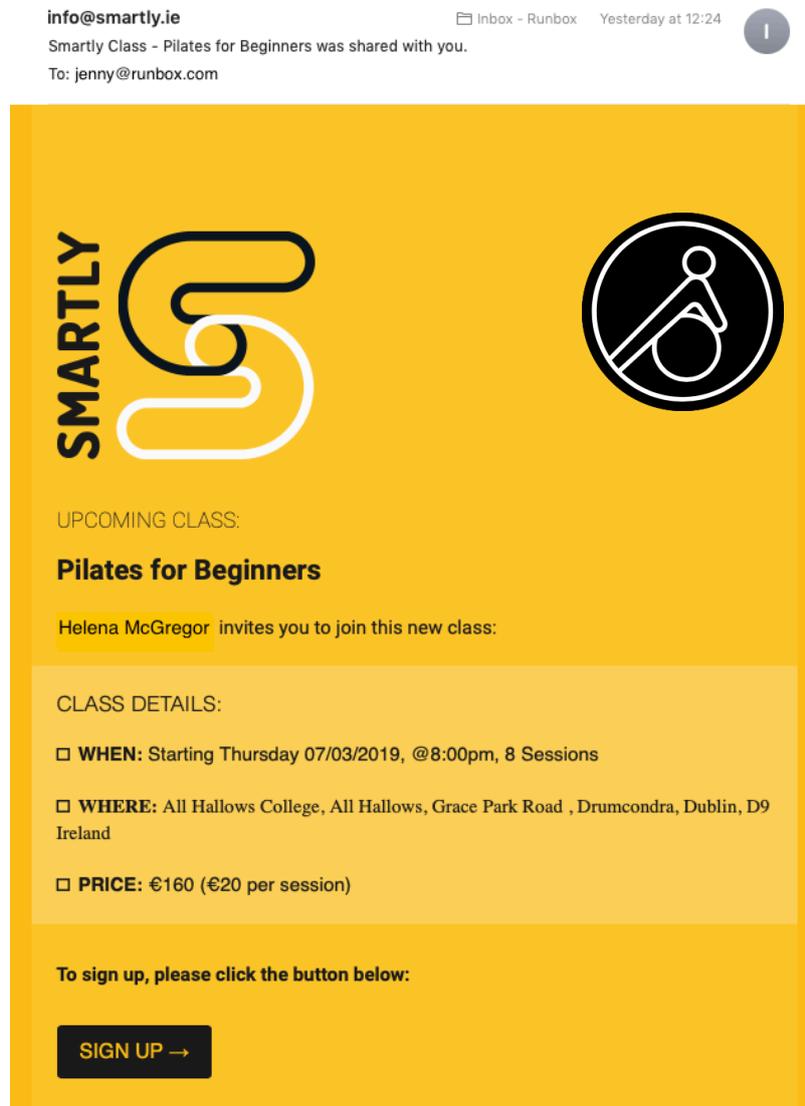


Click the **Twitter** icon to share on Twitter. Smartly will open Twitter in a new tab in your browser, where you can log in and tweet the link to your followers. As before, you can go back to the Smartly tab to continue sharing class details in other ways.



Click the **Text** icon to share via text messages. If you're accessing the platform from your phone, the text messaging app will automatically open with the class URL in the text message. You can add additional text to the message and designate the recipients.

To **Email** the class link, enter your clients' email addresses under **Email To** and click **Send Emails**. Smartly will send them an email that looks like this:



3. Reviewing your classes

Once you've set up some classes, you'll see that they are sorted into categories on the Classes page — Active, Pending, Completed and Cancelled. Each class is displayed as a tile. Click on the tile to review the class details. From there, you can:

- Cancel** the entire block of classes or individual classes.
- Email** all class attendees.
- Delete** the class.

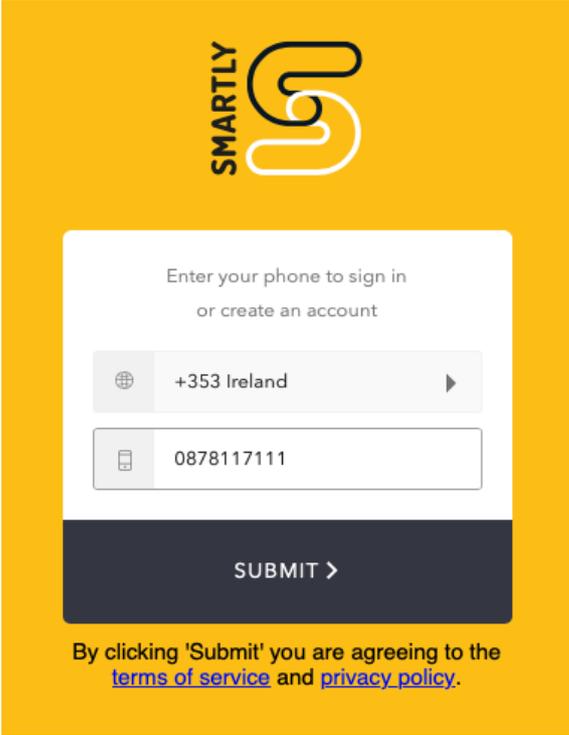
When you cancel a class or all classes, Smartly will automatically email the class participants to let them know.

What your Clients See in Smartly

1. Signing up and logging in to Smartly

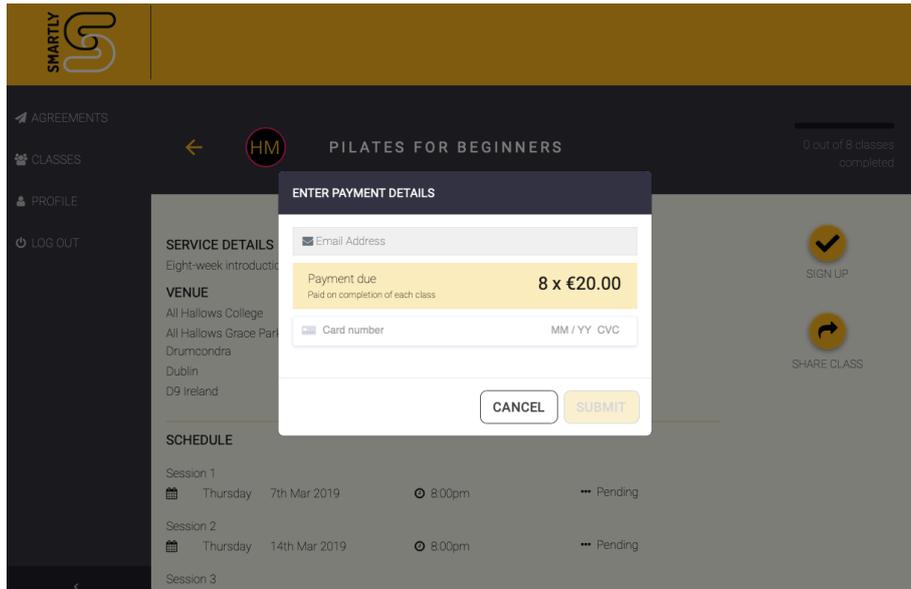
When the client clicks **Sign Up** in the email they receive, or if they click on a Smartly link they've received by text message, Facebook or Twitter, they'll arrive at Smartly's client sign-in page.

If this is their first time using Smartly, this is the first step in setting up an account. If they've used Smartly before, this is where they log in. The client is prompted to enter their phone number:

The image shows a mobile sign-in form for Smartly. At the top is the Smartly logo, which consists of the word "SMARTLY" in a bold, sans-serif font next to a stylized white outline of the letter "S". Below the logo is a white rectangular form with rounded corners. Inside the form, the text "Enter your phone to sign in or create an account" is centered. Below this text is a dropdown menu for the phone number country code, currently set to "+353 Ireland" with a globe icon on the left and a right-pointing arrow on the right. Below the dropdown is a text input field containing the phone number "0878117111" with a mobile phone icon on the left. At the bottom of the form is a dark grey button with the text "SUBMIT >". Below the form, there is a line of text: "By clicking 'Submit' you are agreeing to the [terms of service](#) and [privacy policy](#)."

For first-time users, Smartly will send a verification code to the client's mobile phone. When they enter the code, they'll arrive on either the Agreements page or the Classes page, depending on the link they received (whether an invitation to a class or to review an agreement for one-on-one appointments).

Once logged in to Smartly, your clients can see the same general layout as you, but the contents of the pages will differ. The Profile page, for example, looks like this — with just payment details and basic contact information:



2. How the client accepts an agreement

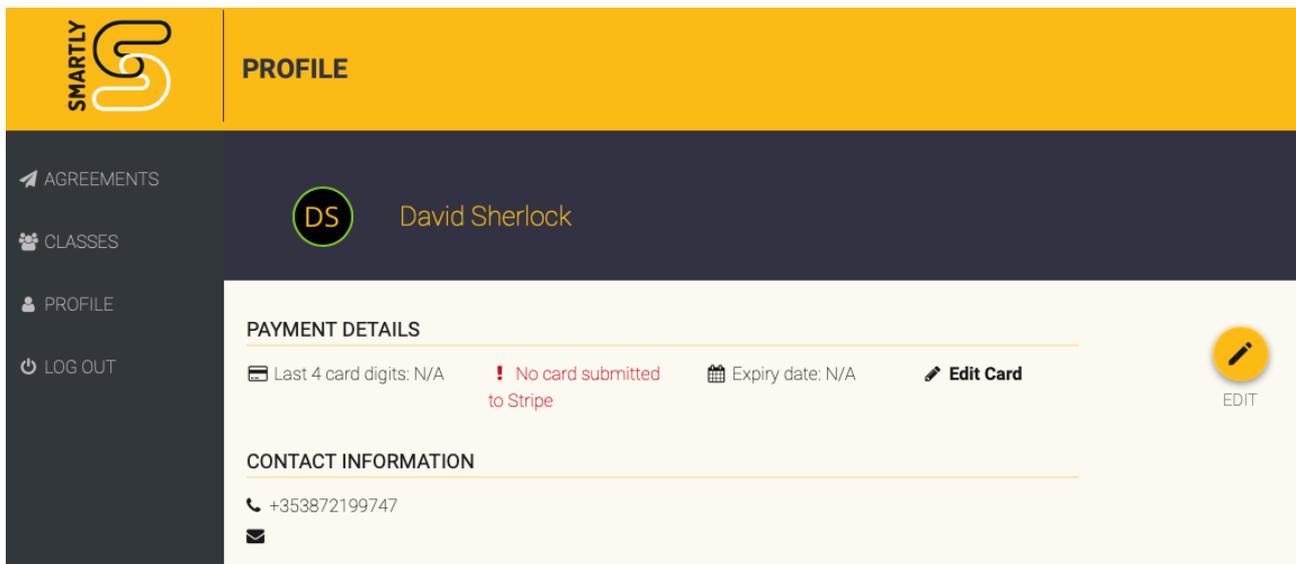
When the client clicks the Agreement link you sent and logs in to Smartly, they'll arrive on a page with all the information about the agreement along with an **Accept** and **Decline** button. When they click Accept, a payment window will pop up where they can enter credit card details. (For more on how payments work, go to page 10.) If they click Decline, Smartly displays a note saying "Thank you. You have declined this invitation."



Smartly will then send you an email to say whether your client has accepted or declined your invitation.

3. How the client signs up to a class

When the client clicks **Sign Up** in the email you sent, or follows a link they received via text message, Facebook or Twitter, they'll arrive on the Classes page which displays all the information about the class. There, they can click **Sign Up** to join the class. A payment window will pop up:



The client cannot sign up for the class without entering their payment details.

Notice that the **Share Class** button is also available to your clients so they can also tell people they know about the class. The Share Class button generates an email that contains a link to the Smartly page about the class (much like the Share button in newspaper apps or YouTube).



Smartly will send you an email to say that your client has signed up for the class.

How Payment Works

You can keep track of payments by clicking the **Payment** button in the left-hand menu.

1. Payment rules for agreements

- If your client cancels an appointment before the agreed cancellation window, they will not be charged.
- If your client cancels an appointment after the cancellation window, they are charged at the time of cancellation in line with the agreement (a percentage of the normal appointment fee).
- If your client does not attend, and does not cancel, they are charged the full fee for the appointment.
- Payment for appointments is taken at the start of the appointment.
- You can check the payments tab to ensure that payment was successfully taken. This is denoted in green lettering with a plus sign:



- Unsuccessful payments are denoted in red lettering with an exclamation point. Failed payments will not be charged, so you'll need to resolve these directly with your client.



2. Payment rules for classes

- If a class attendee cancels before the agreed cancellation window, they will not be charged.
- If an attendee cancels after the cancellation window, they are charged at the time of cancellation in line with the agreement (a percentage of the normal class fee).
- If an attendee does not show up, and does not cancel, they are charged the full fee for the class.
- Payment for classes is taken at the start of the class.
- You can check the payments tab to ensure that payment was successfully taken. This is denoted in green lettering with a plus sign:



- Unsuccessful payments are denoted in red lettering with an exclamation point. Failed payments will not be charged, so you'll need to resolve these directly with your client.



*The texting, email and pilates icons used in this user guide are from The Noun Project:
<https://thenounproject.com>*