This companion to the MINDBODY Setup Checklist is meant to help introduce you to the various tools and features you will use to set up your business in our software.

Additionally, there is area for notes for you to record questions for your onboarding training.
First Steps

Log into your site

As soon as your site has been built, you will receive an email titled "Your MINDBODY Site is Ready." Using this e-mail, you will be able to set up your Owner password and access your MINDBODY site for the first time.

Quick tip: We recommend bookmarking your site right away to make it easier to find in the future.

The Setup Checklist

As soon as you create your password and log into your MINDBODY site for the first time, you will see the Setup Checklist.

This is a setup assistant which will walk you through a list of tasks that will need to be completed to start running your site for your business.

You will be directed to your Setup Checklist upon logging into your MINDBODY site.

Your Checklist has Interactive Icons:

Click this Button to Begin a Walkthrough for the task at hand.

Track your Progress by checking a box when the task is complete.

Want More Information? Click the "info" or "play" buttons to access articles and video tutorials on our MINDBODY Support site.

For more information on the Setup Checklist, go to support.mindbodyonline.com and search for the ‘Setup Checklist’ article.
Throughout this guide there are references to our Support Center. The Support Center is a searchable library of video tutorials, FAQs, and articles that can help guide you through the setup and daily use of your software.

Many features within your MINDBODY site will link directly to these resources, while this companion guide recommends some additional searches to supplement your knowledge.

You can access the Support Center at any time by clicking on the 'Help' button in the upper right-hand corner of your MINDBODY site, or by going to www.support.mindbodyonline.com.

Quick tip: Check out the New to MINDBODY section to find information that is most relevant to you, as a new customer.
Getting Started

Set your password recovery questions

Click on your name in the upper right-hand corner > My account info > Password Recovery Questions

Use this page to update your password and set your security Questions. Be sure to complete this step as soon as possible. Doing so will allow you to easily reset your own password if needed and keep your information secure.

Add details about your business

Home > Manager Tools > Settings > Business Information

This page is divided up into five sections.

- **Business Location**: Enter your Business' address and Time Zone
- **MINDBODY APP**: This is a free mobile app that allows clients to easily sign up and pay for services using their mobile devices.
- **Contact Information**: Enter your business's contact details for all situations.
- **Logos**: These logos will appear on your MINDBODY site, MINDBODY apps, and gift cards. Add your logo and promote your Brand!
- **Tax Rates**: Enter the tax rates for each of your locations. This setting tells the software what the tax rates are where you provide services.
Setting up your staff

Add your staff

Home > Staff > +Add Staff in the upper right corner

Use this section to enter in your staff details. Any staff who will need a custom login to the site or will use the software to schedule services will need a staff profile; even you, if you provide services!

For more info, go to www.support.mindbodyonline.com and search for "Adding Staff."

Create staff logins

Home > Staff > Select a Staff Member > Enter desired username and password on the right > Save

For each staff member who needs access to the software, you will need to select a username, password, and permission level.

*Editing permission levels is currently only available at the software levels Pro and above.

For more info, go to www.support.mindbodyonline.com and search for "Setting up Staff Logins."

Setup class and hourly payrates

Home > Staff > Select a Staff Member > Class/Hourly payrates on the top menu

Whether you pay your staff hourly or per class they teach, you will be able to use the class/hour/commission pay rates page to help you track payroll.

For more info, go to www.support.mindbodyonline.com and search for "Class and Enrollment Pay Rates."

Review permission groups

Home > Manager tools > Staff permissions

Use this page to customize varying levels of access to the software for your staff. For example: a front desk admin vs. a manager.

*Editing permission groups is currently only available at the software levels Pro and above.

For more info go to www.support.mindbodyonline.com and search for "Staff Permissions Explained."
Classes are a regularly scheduled service that a staff member offers to multiple students on a drop in, flexible attendance schedule.

In the example below, the business offers regular group classes throughout the week. Their martial arts classes are more expensive than their yoga classes, and they offer separate monthly memberships depending on the style of classes. To keep the pricing separate, they set up each style of class in a separate service category. This ensures that clients cannot buy the less expensive yoga passes and be able to schedule the more expensive martial arts classes.

Quick tip: We strongly recommend grouping your classes into separate service categories based on price point. This will ensure that only the correctly priced passes will allow entry into your group classes.

1. Organize and create your class service categories.
2. Add classes by clicking + Add a class. Here, you can add in class names and descriptions.
3. Enter your class schedules, class capacities and who instructs the class.
4. Add how much you charge to attend class for single multiple sessions. You can also add package deals and contract options to pay for classes.

For more info, go to www.support.mindbodyonline.com and search for “Classes: Setup, Scheduling, and Pricing”.  

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Setting up your appointments

Appointments are one-on-one or small group services booked at the time of a client’s choosing on a staff member’s available schedule.

In the example below, this business offers personal training and some massage services. To make booking easier for their customers, they separated out the two different types of services into different categories.

This means that a customer who is browsing online or on the MINDBODY app will be able to view and book with a sorted list.

Quick tip: We strongly recommend grouping your appointments into separate categories based on type of service. This will ensure that your services are organized in an orderly fashion when offered to your customers.

1. Organize and create your appointment service categories.
2. Add appointment types by clicking + Add an appointment type. Here, you can add in appointment names and descriptions. i.e., a 30 minute massage and a 60 minute massage are appointment types
3. Click + Assign staff to tell your site which staff members perform this type of service.
4. Add staff schedules and tell your site when your staff is available to take appointments.
5. Add how much you charge for appointment services by clicking + Add pricing.

For more info, go to www.support.mindbodyonline.com and search for “Appointments: Setup, assign, availability and pricing”. You can also search for “Scheduling staff appointment availability”.
Setting up your workshops

An enrollment is a workshop or special event when a staff member offers a service to multiple customers all at once. Enrollments differ from classes because customers will need to commit to attend most or all of the scheduled sessions. Additionally, enrollments tend to run for a limited time and have higher price points than classes.

In the example below, this business offers teacher training on various subjects and yoga workshops. To make booking easier for their customers, they separated out the two different types of services into different categories.

*This feature is available to Essential, Accelerate and Ultimate subscriptions.*

Quick tip: We strongly recommend grouping your appointments into separate categories based on the type of service and how unique it is. This will ensure that your services are organized in an orderly fashion when offered to your customers.

1. Add, organize and create your enrollment service categories.
2. Add and name your workshop by clicking + Add new enrollment. Here, you can add in enrollment names and descriptions.
3. Add the schedule for your enrollment by clicking + Add a schedule to tell your site when and how long the workshop runs, and which of your staff will be instructing.
4. Add how much you charge for your workshop by clicking + Add pricing for enrollment.

For more info, go to www.support.mindbodyonline.com and search for “Enrollments: how to set up and schedule enrollments”.
Setting up open gym

Arrivals are common for gyms and other businesses where customers pay to access your facilities or equipment, but are not being directly instructed by your staff.

In the example below, this business offers open gym hours and punch cards, so clients can check into the facility at their convenience.

*This feature is available to Essential, Accelerate and Ultimate subscriptions.

Quick tip: Arrivals can be used to setup memberships that pay for additional access offered at your business. To learn more, go to www.support.mindbodyonline.com and search for “Adding arrival service categories”.

1. Add and organize your arrival service categories.
2. Add how much you charge to allow access to your facility by clicking + Add pricing; you can choose single, multiple and unlimited session punch cards or a auto-renewing contract.

For more info, go to www.support.mindbodyonline.com and search for “Arrivals (gym sign-in)”.
Setting up additional pricing

### Add retail products

Add your inventory! Here, you can enter in product descriptions and pricing.

To enter your products, click the link in your Setup Checklist or by going to the Products menu in the upper right hand corner of your screen.

*For more info, search for the “Manage Products” article in the Support Center.*

### Set up gift cards

You can sell gift cards at your business or online.

To add pre-paid gift cards, click **Home > Manager Tools > Gift cards > + Add new**

*For more info, search for the “Pre-paid gift cards” article in the Support Center.*

### Create packages

Packages allow you to bundle a set of different services and products together.

For example, a day package at a spa might include a facial, a massage and a bathrobe.

To add packages, click **Home > Manager Tools > Packages > + Add new**

*For more info, search for the “Packages” article in the Support Center.*
Moving forward

The best way to become a pro is to integrate your MINDBODY site into your daily business operations.

The Daily Use section of your Setup Checklist has tutorials and access to help content. We highly recommend that you utilize this resource, and to continue using the Support Center to search for answers to your everyday questions.
Additional apps and products

**MINDBODY app**
The MINDBODY app is a free mobile app that links you to a worldwide network of MINDBODY businesses. You can browse classes, book appointments, and buy passes from opted-in businesses in your area.

**MINDBODY Business**
The MINDBODY business app is our business-facing mobile app that places the convenience of MINDBODY in the palm of your hand. With the MINDBODY business app, you can monitor your business and manage your clients no matter where you are.

**MINDBODY Class Check-in for the iPad**
Free up your front desk! The Class Check-in app simplifies the class sign-in process and gives you more time to focus on your clients as they arrive at your studio. With just the tap of a finger, your clients can check themselves in to class from an iPad.

**Your Logo Here**
This tailored app pairs the convenience of your MINDBODY software with a look and feel that’s uniquely yours. Increase your brand exposure, stay connected with your customers and give them more access to your business. *An add on service to Pro, Accelerate and Ultimate Subscribers.*

**Branded web**
Branded web allows you to seamlessly integrate your MINDBODY schedules and pricing into your business website, meaning your clients can book and pay for their services without ever leaving your site! *For Pro, Accelerate and Ultimate subscribers.*

**MINDBODY Marketplace**
Do you need to purchase hardware or accessories? Do you need a solution for marketing emails? MINDBODY has partnered with companies which can provide these and more! Check out the possibilities at www.mindbodyonline.com/marketplace
Quick tip: Whether you have an appointment coming up with an onboarding specialist to help you set up your software, or just need some extra room for notes and questions, this page is for you to keep track of your notes.

Print as many copies as this page as you might need to take notes and write down questions that come up as you set up your software.