



Packages in Bizzflo



What is a PACKAGE in Bizzflo?

Packages in Bizzflo provide the opportunity for you to sell in bulk any of your individual services, classes (events) or products.

For example: if you are a massage therapist and your 60 minute massage costs \$90.00, you can create a package of Ten 60-minute massage for \$800.00 (providing an incentive to your customer to buy in bulk and pay upfront)

You can also create complex packages that combine services, classes and products.

Packages in Bizzflo



Why use Packages ?

Customer Retention – Incentive for your customers to buy in bulk

Increase Cash Flow – Incentive for your customers to pay upfront

Benefit of predictable sales and guaranteed revenue

Ease of automation and management





How to use Packages in Bizzflo to maximize your revenue opportunity

Design & Define your Package

Create it in Bizzflo

Publish it for customers to book or to use in POS

Measure Effectiveness & Refine



Designing your Package

Choose a service or event for the package – 10 of something, 20 of something

• Example: 10 of a given service or class or a product; 10 60-minute massage

Complex packages may have more than one service or a combination thereof (of services, classes, or products)

• Example: a package may have 5 massage appointments, 1 free class and 2 bottles of massage oil



Creating your Package in Bizzflo



Bizzflo Menu

Add Package Screen



1 2 3 4 Package Items Pricing Forms	Add Package Step - 1
Step 1 : Add New Subscription Package	
Type * Select Type *	
Status Do Not Publish 🔻	
Name * name	Contract & Expiration
Display availability online (Note: If unchecked it will be available only for phone ins/walk ins)	determines how long
Contract Details	the packages are valid
Contract Duration * None V None V from the date of first appointment	
Expiration * None V None V from the date of purchase	
Sharing	
This package can be shared with other family members	
If checked, the customer will be able to use this package to book service appointments for any of the family members listed under their account.	Allowed Locations for the Package
Description	Locations Select All
(This will be disclosed to the systemes)	Associate staff to package
	Staff Select Staff 💌
Tags can be used	Tags
to connect to Auto	Tag Customer Select Tags Add New Tag
Responders	Save & Next X Cancel



Package 2 Items Items	3 Pricing Forms	5 Agreements	Add Package Items Step - 2
Item Type No data available in table	Quantity	Action	What is included in the Package? × Choose Item
Description of Included Items in the Package (OPTIO	NAL)	age that is	Services Classes Products Note: You can select only one item here. If package includes multiple items (Classes or Services) please add all of them one by one (using Add Items). Cancel Select Item
items available above		Add Item : Pers	sonal Training with Kevin (60 mins)
			Quantity * 10 Note : Minimum 1



A Complex Package

With multiple items

Package Details	🧮 Items	\$ Pricing	👬 Forms	Agreements	🛍 Image	Custom notification			
Add P	ackage Ite	ms					+ Add Items		
Displa	ay 10 ~	records							
Item			Туре			Quantity	Action		
Perso	nal Training w	ith Kevin (60 m	ins) Servi	ce		10			
Medit	ation		Servi	ce		5			
Paleo	Paleo Protein- Vanilla Product 2								
Show	ving 1 to 3 of	3 entries					« 1 »		
			Charala harra if	the metaness is a			a hat a sha ha tha ta t		

For multiple item package, Check here if the customer is not restricted by the quantity of each item, but only by the tota package quantity.

(if this flag is checked then the customer will be allowed to substitute one item for the other and is limited only by the total quantity of items in the package)

For multiple item packages you have the option to limit the package by the total (cumulative) number. So in the package given here, if this box is checked, the customer is limited to the total of 17 items but it could be any 17. ie. 5 personal training sessions, 10 meditation and 2 paleo (or) 12 PT sessions and 5 meditation.







Package Ite Step 4 : Add Forms (optional) To have form(s) filled out online during pure This is a multiple selection box. You can sele Form	erms Prio chase, attach here ect multiple items and add it here. Select Forms (Note: If unchecked, no forms will be	cing Forms	5 Agreemer	Optio	onal Steps	54 & 5
Allow user to skip Show the form only for the first time	x OFF x OFF Prev	Save & Next →		Optional custor	agreement to b ners when purc package	e signed by hasing a
Optional forms t customers whe pac	o be filled out en purchasing a kage	by Step 5 : Add Agreements Select one of the options be Skip this step if you do n Use the default agreeme Add a new document/ag	(optional) low to configure agreements or to ot require any documents to be d nt (from the policies section - Poli reement here.	Pricing o add documents: isplayed, or to be signed by the cies -> Agreements/forms).	Forms	4greements





Add an Image to provide a better experience your customers when booking online

Additional Steps

After creating the package, available in edit mode only

Additional Instructions that needs to be sent to the customer when they purchase a package





Customer Online Purchase Process



Customer Online Purchase – Step 1: List View





Customer Online Purchase – Step 2: Payment Options

★+ Fitness Plus	GES MEMBERSHIPS	PRODUCTS Fitness Pac \$ 500.00	n GIFT CARDS	টি login हি 0 - • ☆ Back to List	
	Expiration : Details :	1 Year(s) Wellness & Fitness P	lack		
1 Location : Chicago 2 Review and Checkout					Select
	Package	e Price			option
Full Payment	00.00	F	Full	\$500.00	
 Installment Payment \$12 	25.00 (First installment)	4	(Payment plan)	\$500.00	
Items included in the package		Quantity		✔ Check Out	
Personal Training with Kevin (60 mins)		10			
Meditation		5			
aco rocur varilla		2			



Customer Online Purchase – Step 3: Signin

χ+ Fitness Plus		
🛱 APPOINTMENTS 🏦 CLASSES 🚔 PACKAGES 🚍 MEMBERSHIPS 📦 PRODUCTS 👼 GIFT CARDS		Ce look
Sign in (Please sign in or create account to continue)	JS Ises 🚔 packages 🖽 memberships 🕡 products 🍪 gift cards	
Returning Customer New Customer	Sign in (Please sign in or create account to continue)	
Username	Returning Customer New Customer	
Password	Email Address	
Remember Me	Password	
Log In	Confirm Password	
Forgot Password?	First Name Last Name	
By signing in you are agreeing to our "terms" of sale and "privacy" notice below.	Gender : 🔍 Male 🔍 Female	
Powered by Bizzflo™ Privacy Terms	phone number	
	mobile number	
	Select Carrier	
	send me text message for appointment notifications I have read and accept Bizzflo "terms of use"	Purchase for Self of Someone else
	Register Now	
	By signing in you are agreeing to our "terms" of sale and "privacy" notice below.	*+ Fitness Plus
	Powered by Bizzflo™ Privacy Terms	🚔 APPOINTMENTS 🟦 CLASSES 🚔 PACKAGES 🖃 MEMBERSHIPS 🖗 PRODUCTS 🏟 GIFT CARDS 🗦 📜 🕞
Customer login or New Accoun	t sten	(1) Who is this package for ?
		Someone Else
		Add To Cart Next Step



Customer Online Purchase – Step 4: Agreement





Customer Online Purchase – Step 5: Checkout

∦ + Fitnes	s Plus				Hi, krishna@	@bizzflo.com My Accoun	🕞 Logout
APPOINTMENTS	▲ CLASSES	DACKAGES	MEMBERSHIPS	PRODUCTS	B GIFT CARDS		📜 1 -
			Confirm & C	Checkout			
Image		Product		Price	Qty	Total	Remove
1 Small	Wellness & Fit Wellness & Fitn Family Member	ness Pack less Pack : : Self		\$500.00	1	\$500.00	
			Items Included in	the Package			
		Personal Training v	vith Kevin (60 mins)	\$60	10	Included	
		Meditation		\$45	5	Included	
		Paleo Protein- Vani see more	lla	\$64.95	2	Included	
Shipping Address		Add	Address		Enter Prom	notional/Voucher Code Card Voucher Code	C Apply
						Subtota	I: \$500.00
	_					Discour	t: \$0.00
Billing Information	A.					Та	x: \$0.00
Cardholder Name		Billin	ng Street Address	Add Address	Į I	Shippin	g: \$0.00
Card number		En	ter your Address			Order Tota	1: \$500.00
	NSCOVER	Please you. Y contin	e start typing your address. We w ou can select from the list if a ma ue typing	ill try and find a match for atching address shows up or	4	C Place ye	our order
Security code (CVC)		If a Zipc	ode			Cancellatic S	ns & Returns hipping Policy
- • /							



Customer Online Purchase – Purchase Confirmation Page

Hi, krishna@bizzflo.com My Account & Logo							
🛗 APPOINTMENTS 🏛 CLASSES 📾 PACKAGES 🗟	MEMBERSHIPS	PRODUCTS	🛱 GIFT CARDS	P 0 -			
ank you for your purchase. Continue Shopping Logout							
Customer : Krishna Kurup krishna@bizzflo.com 8477786127			Invoice # : Invoice Date : Booking Method : Payment Type :	10055 Dec 20,2016 08:56 AM Online Full payment			
Order Details							
	Items Included i	n the Package					
Item	Qty	Price	Total				
Package : Wellness & Fitness Pack Member : Self	1	\$500.00	\$500.	00			
Personal Training with Kevin (60 mins)	10	\$60	Includ	ed			
Meditation	5	\$45	Includ	ed			
product: Paleo Protein- Vanilla	2	\$0.00	Includ	ed			
Promotion PACKPROMO Applied		(\$500.00)	(\$500	0.00)			
fou will receive an email at (krishna@bizzflo.com) with your orde	details.			Subtotal : \$500.00			
Shipping Address				Discount : \$500.00			
Type Address				Tax: \$0.00			
Home 1570 Macalpin Circle,Inverness,IL,United States 60010				Shipping: \$0.00			
				Order Total: \$0.00			
				Outstanding Balance : \$0.00			



Customer Online Purchase – Notification & Receipt

INVOICE

Tue 12/20/2016 8:45 AM Fitness Plus <noreply@mail.bizzflo.com> Fitness Plus Receipt Details for Order # 10055 To krishma@bizzflo.com Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message. Fitness Plus invoice_10</noreply@mail.bizzflo.com>	Krishna Kurupkrishna@bizzflo.com 8477786127	Invoice # : 10055 Invoice Date : Dec 20, 2016 08:56 am Booking Method : Online Payment Type : Full payment		Fitness Plus
Dear Krishna,	TICKET			
Thank you for your recent purchase of .	Item	Qty	Price	Total
We may contact you if we need additional information to verify your order.	Wellness & Fitness Pack	1	\$500.00	\$500.00
Below you will find the details for Order# 10055		literne Included in the Deck		
Name : Krishna Kurup Payment Method : None		items included in the Pack	age	
Payment Status : None	Personal Training with Kevin (60 mins)	10	\$60.00	Included
PackageName Qty Price	Meditation	5	\$45.00	Included
Wellness & Fitness Pack 1 \$500.00	product : Paleo Protein- Vanilla	2	\$64.95	Included
Thank you for choosing Fitness Plus				
Thank you, Fitness Plus	Promotion PACKPROMO Applied Member :	1	\$500.00	\$500.00
NOTE: THIS MESSAGE HAS BEEN SYSTEM GENERATED. PLEASE DO NOT REPLY TO THIS FMAIL				
	Sub Total : \$500.00 Discount : \$500.0	00 Tax:0	Shipping : \$0	Total : \$0.00
			Outstandin	g Balance : \$0.00



Customer Booking a Service using Package







X+ Fitness Plus					Hi, krishna@bizz	flo.com My Acco	unt @ Logout
	PACKAGES	E MEMBERSHIPS	PRODUCTS	Ø GIF	r cards		R 0 -
1 Who is this appointment for ?							
2 Agreements/Waivers							
Attached Document : Fitness Plus Waiver							Download V
Please Read : Fitness Plus Walver							Printe
	1/						
It is recommended that all participants attably work. It is strongly suggested Person in this tart category without the strong strong strong strong strong by the Filters that Starf for Hylers the strong strong strong strong strong strong transmit through the strong strong strong tasketility that would prectude you from Person rad the store agreement, cited It to bot	undergo a physician' hat participanta with e a physician's coarning a physician's coarning provide the partial to Plus. Ipolo and/or manual include but are not li sonal injury of any kir a participating in an eo so. sign and oble to conso	Whin is examination before sits one or more primary title if ation and consent acknow their health and well-beil therapy, every effort will be mitled to increased heart i mitled to increased heart i which is non-fats overcise program and/or m ent.	22 tring an exercise progra actors and/or participars (edge they have been in ng. You understand by: re made to assure your stress and musculosket or fatal. You also ackn annual therapy.	etti, or any rta over th informed o signing thi safety. Ho letal injury. iowledge t	form of menual the e age of forty have i of the importance of is agreement that no server, as with any in voluntarity signifi- hat you have no lim	rapy regardless of a physical examination i said examination i o responsibility is a exercise program g this agreement, king physical cond	age or alion. and sourmed and/or you agree lions or
It is recommended that all participants activity low. It is strongly acquired. Persons in the titue capacy without accept full responsibility for consequence of the strongly access to the strongly with a performant benzy. Here are deal, which to assume all strongly pre-accels pre- disability that would pre-likely us hor Please need the above agreement, check the bit	undergo a physician' hat participants with d a physician's examine notes, which pertain to Phile. Phile. Include but are not lin sonal hypery of any kin sonal hypery of any k	Wash is assemination before sits one or more primary risk if and consent acknow their health and well-beil their health and well-beil their post of the sits of the risk of the sits of th	Ef tring an exercise progra- taction and/or participan- dege thus have been in rg. You understand by: se made to assure you trees and mucuolosite trees and mucuolosite to fatal. You also ackn anual therapy.	em, or any the over the informed of signing the safety. Ho letal injury, coeledge t	form of menual the e age of forty have a of the importance of a greement that no seever, as with any in voluntarily signif- hat you have no lim	rapy regardless of a physical examination said examination o responsibility is a exercise program og this agreentert, king physical cond	age or ition. and sourmed and/or you agree itions or
It is recommended that all participants addity laws, it is strongly augusted accept ful responsibility for contexpen- by the Friender Statistical Contexpen- by the Friender Statistical Contexpen- tion and the strongly and the strong dealed by the resource of the strong of the dealed by the resource of the strong of the dealed by the would preclude you from Please med the sclose agreement, there is also have read and agree to the terms of advoce a meaner of for friender turn.	undergo a physician hat participaets with c a physician's ocarrieri needs, which pertain to Plus. Ipola andro manual include but are not lit sosnal injury of any kir sosnal injury of any kir so, sign and late to conse so, sign and late to conse	Wash a samination hefers the air nor more primary risk (fa- tation and consent acknow their health and well-beil therapy, every effort will be therapy, every effort will be rerisk on on-fasts verske program and/or m erst.	21 tring an exercise progra- taction and/or participan- disgle thuy have been in gi, You understand by: se made to assure your towns and mucousload to fatal. You also ackn ansaid therapy.	etti, or erriy nte over thi informado e signing thi safety, Ho letal injury, coeledge t	form of menual the e age of forty have a the importance of s agreement that no weever, as with any in voluntarily signin in voluntarily signin hat you have no lim	rapy regardless of a physical examination or responsibility is a exercise program rg this agreement, thing physical cond	age or kion. and sourned and/or you agree kions or
An encommended that all participants and shy well, "It also strongly suggested hences in the star suggest strangly suggested by the Filterses THe Starfor to Filterse manual theory, these are read, while the performing successful precision you have manual theory, these are read, while the starfs theory is the strangly starfs and analytic that would precision you have Planes manche allows guarenteet, then the links of ended and garves to the terms of above 12 links read and garves to the terms of above.	undergo a physician' hat participants with o a physician's examine onces, which pertain to Plas. Typics and/or manual include but are not it posticipant but are not it social hipsy of any kir sparticipating in an ex- sc. sign and date to cons- sc. sign and date to cons-	Wash * examination before task nor more primary risk (fa- tation and consent acknow their health and well-beil therapy, encry effort will be therapy, encry effort will be rested to a set of the set of the therapy encry effort will be therapy encry effort will be rested to a set of the set of the encry encry effort will be encry effort wil	Et tring an exercise program cactors and/or participan- dedge they have been in gg, You understand by rough and an annual sease and annual therapy.	am, or any the over the informed of signing the safety. Ho letal injury. coeledge t	form of manual the eage of forty have of the importance of a greement that no never, as with any in voluntarity signifi- hat you have no lim	rapy regardless of a physical assembla said examination is responsibility is a exercise program phile agreement, bing physical cond	age or kilon. sesumed and/or you agree kilons or

Package List

You have a package available in your account for the service you have selected. If you want to redeem it, please select it,

else Skip (you will be required to pay for the service, if you skip).

service Personal Training with Wellness & Fitness Pack 10 0 Kevin (60 mins)	Туре	Name	Package Name	Quantity	Used	Available
Dan't Redeem N	service	Personal Training with Kevin (60 mins)	Wellness & Fitness Pack	10	0	10
Don't Redeem				Don't Redeem	Redee	em Now 🗲



Package Administration & Management



Review Package Purchases by Provider

Dashboard	Home > Purchases > Package L	List								
🛗 Calendar	Packages List									
📝 Purchases 🗸 🗸	Display 10 🔻 records									
- Appointment List	Type \$	Name 🗢	Contract Duration +	Expiration Purchased	Status	Options	Раск	age	Purc	thase Lis
Classes List	Personal Training Pe	ersonal Training with Kevi 1	Year(s) 1 Ye	ear(s) 1	Active	• • • •				
	Personal Training Pe	ersonal Training - 10 pack 1	Year(s) 1 Ye	ear(s) 2	Active	07				
Packages List	Yoga Pack We	leight Loss Pack 1	Year(s) 1 Ye	ear(s) 0	Active	OCE				
···· Memberships List	Yoga Pack Me	editation 1	Year(s) 1 Ye	ear(s) 0	Active		\mathbf{i}			
Memberships List	Wellness We	ellness & Fitness Pack 1	Year(s) 1 Ye	ear(s) 1	Active	022				
···· Product Orders	Showing 1 to 5 of 5 entries									
Giftcards										
💲 Payments 🛛 🗸		Package (Well	ness & Fitness Pacl	<)						×
🚰 Customers 🗸 🗸		Active Inactive								
		Display 10	records				Sea	rch:		
Menu		Customer	Item_Name	\$	Purchase_Date	Last_Usage	Qty \$	Jsed €	Available \$	Option
		Krishna Kurup (Self)	Personal Training with Meditation	Kevin (60 mins)	Dec 18, 2016	Dec 18, 2016	10 5		10 5	C 🖞
		Showing 1 to 1 o	f 1 entries						« 1	»



Review Package Purchases by Provider - CRM

				isinia Kulup												
			Last Appointment : Oct 2	17, 2016	Unsubscribe	e: None	L	ast Activity on: Jul 03, 2016	С	ustomer Since: Ma	ar 09, 2016					
*	Customers	~	Active Inactive	Prospect OSuspend					A Resend Lo	ogin Details 🗎 De	ete Customer					
(» C	Customers		Image: transformed stateImage: transfo	Notes/Forms Agre	eements Purchases	\$ Billing Activ	ities Notifications	Marketing Alerts	Ø Misc 🗸							
- Fa	amily Members		i Purchases	Subscriptions	\sim											
Ta	ags		i Appointments	E Classes Paci	kages Nembershi	ps 🎦 Products	🛱 Gift cards				- 14					
N	lotes/Forms			lecolus						Total						
Ø 1	Activities		Package Type 🗘	Package Name 🗘	Purchase Date 🗘	Expiration	Last Usage	♦ Member	Total Used (all i	tems) Available (all items)	Options					
	Marketing	~	Package Type	Package Name	Purchase Date	Expiration	Last Usage	Member	Total Used (all i	tems) Total Av	\frown					
	0		Wellness	Wellness & Fitness Pack	Dec 18, 2016	1 Year(s)	Dec 18, 2016	Self	2	17						
			Personal Training	Personal Training - 10 pack	Jul 03, 2016	1 Year(s)	Jul 03, 2016	Self	0	10 Package - (\	■ Mellness & Fitnes	s Pack)				×
			Showing 1 to 2 of 2 e	entries												
										Item		Туре	Quantity	Used	Available	
										Personal Tr mins)	raining with Kevin (60	Service	10	0	10	ľ
										Meditation		Service	5	0	5	ß
										Extend I	Package Expirat	tion			-	

nurchace	

se



Package administration - CRM

m	Туре	Quantity	Used	Availabl	e
ersonal Training with Kevin (60 ins)	Service	10	0	10	
/leditation	Service	5	0	5	ß
Paleo Protein- Vanilla	Product	2	2	0	
extend Package Expira	tion				
Expiration 1	v	Year(s)		from the d	late of
purchase					
		_			
	✓ Save	🗙 Cancel			
1	✓ Save	X Cancel			
	✓ Save	* Cancel			
	✓ Save	× Cancel Exte	end e	xpirat	tion

Packages in Bizzflo - Editing a Package



Package Edit

i Packa	age Details 📑 II	tems \$ Pricing	📥 Forms	Agreements	🛍 Image	Custom notification	
	Add Packa	ge Items					+ Add Items
	Display 10	 records 					
	Item		Туре			Quantity	Action
	Yoga Session	for Weight Loss	Service			5	A 🗊
	Showing 1 t	o 1 of 1 entries					« 1 »

Package Items can be deleted if no one has bought the package yet.

Add Package Items			+ Add Items
Display 10 v records			
Item	Туре	Quantity	Action
Personal Training with Kevin (60 mins)	Service	10	
Meditation	Service	5	
Paleo Protein- Vanilla	Product	2	
Showing 1 to 3 of 3 entries			« 1 »

If the package has been bought by at least one customer the package items are no longer available for edit.



Booking in Calendar or POS (with Package)

Krishna Kurup	(krishna@bizzflo.	com) (8	47) 778-6127			×
Dec 19, 2016 10:30 Personal Training w Kevin Wright Location : Chicago Member : Self Booking Method : P	AM - 11:30 AM ith Kevin (60 mins) hone-In (Dec 19, 2016 04:	34 AM)		e 2		Û
 Confirmed 	Checked-in	Complet	te Se	end thank you n	ote! 🕐	
Payment Status :	None Apply Package	ppoint	Choose Statu	JS 🔻 Agree	ments 🖒	Forms
customer appointr Add note	nent notes					
	ට Cancel 👎 No-	Show	☑ Checkout	🗙 Close		

Home > \$ Payments > POS Booking Method Customer H Member S	Phone-In Krishna Kurup Self	Locatic	in :	checko Apply POS t	out, you Packa o comp ransa <u>ct</u>	i can us ge in the lete the ion	e e \$	Add Out. Balance 920.00
							📜 Bookings	📜 Add Items
TICKET								
Item			Member	Qty	Price	Discount	Total	Option
Appointment : Personal Trainin Date & Time : Dec 19, 2016 10:3	g with Kevin (60 mins), Reset 10 am Apply Package	rce : Kevin Wright	Self	1 •	\$60.00	\$0.00	\$60.00	đ
Shippi	ing : \$0.00	Total Disc	ount : <mark>\$0.00</mark>		Tax	: \$0.00	Total a	amount : \$ <mark>60.</mark> (
Enter Promotion Code :	PromotionCod	le	✓ Apply				ü A	dd Exception
Payment Info		Payment Terms	due upon receipt	• C	omplete Transa	action	□ T	urn Off Notificatio
Payment Mode Fu	ll payment 🔻				 Image: A start of the start of	Payment Note	nd Payment Note	es to Customer
or a service l lendar with	booked in an associa	the ited		×	Checkout	A confirmation krishna@bizzflo	email will be sent .com	to
ackage, an A outton will be	pply Pack e available	age to						

If you clicked on

complete the transaction