

MOBILE ENROLLMENT APPLICATION TRAINING GUIDE

The Team Beachbody mobile application allows you to build your business on the go. If you have an iPhone or Android you can **pre-enroll*** customers and Coaches anywhere, anytime. It's as flexible as you are. In a matter of seconds you can:

- [Pre-enroll a New Coach](#)
- [Pre-enroll a New Coach with a Challenge Pack](#)
- [Pre-enroll a New Customer with Free Team Beachbody Membership](#)
- [Pre-enroll a New Customer with a Challenge Pack](#)
- [Pre-enroll New Coaches or Customers with Individual Product Selection](#)
- [Track the Status of Pre-enrollees Throughout Their Enrollment Process](#)

How do I get it?

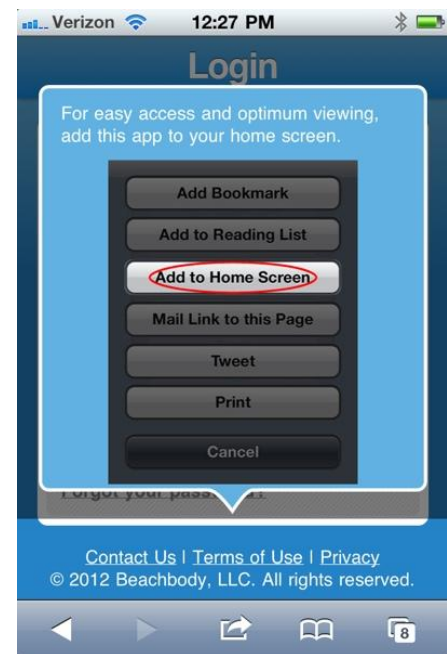
Download the Team Beachbody mobile enrollment app by going to the link below on your mobile device.

<https://coachmobile.teambeachbody.com>

Once there you will need to bookmark the page or, “add to home screen.” The mobile app will then be visible as an icon on the home screen of your phone.

How do I use it?

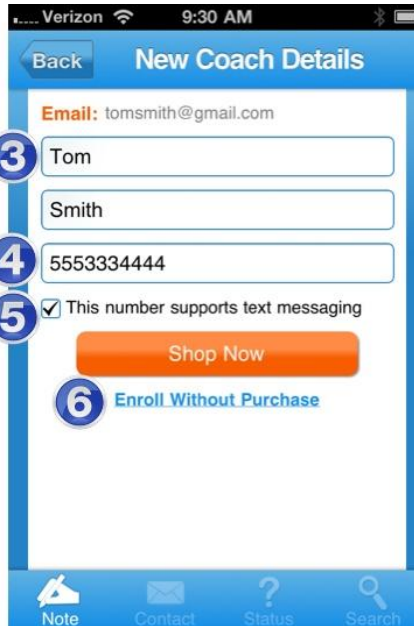
Follow the step-by-step process outlined in this document to pre-enroll your new Coaches and customers and track their status through the enrollment process. You'll also learn about other great features the app has to offer to make building your business that much easier!



***Pre-enroll**: For privacy reasons you will not be entering credit card or social security numbers and information. Therefore, this initial step is only a pre-enrollment. Your contact has to finish the process via the link provided in the confirmation email this app will generate. Your follow-up will be critical to ensure the continuation of this process so that your new Coach or customer is officially enrolled.

Scenario 1: Pre-enroll a New Coach

In this scenario, pre-enroll contacts to become a Coach without a Challenge pack purchase.



1. Enter your contact's email into the email box

2. Select **"Enroll New Coach"**

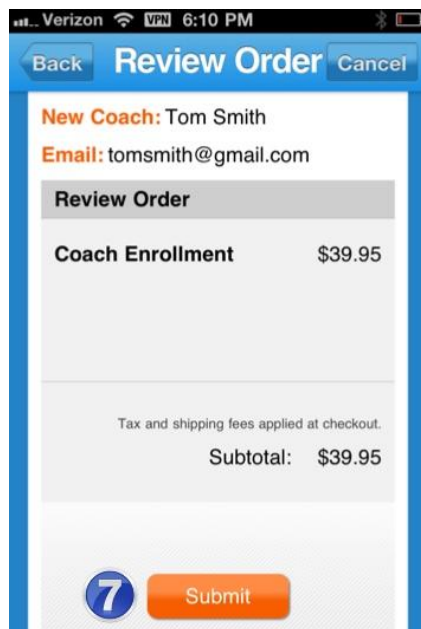
3. Enter your contact's first and last name

4. Enter his or her phone number

5. Ask if the number supports text messaging. If yes, select this box

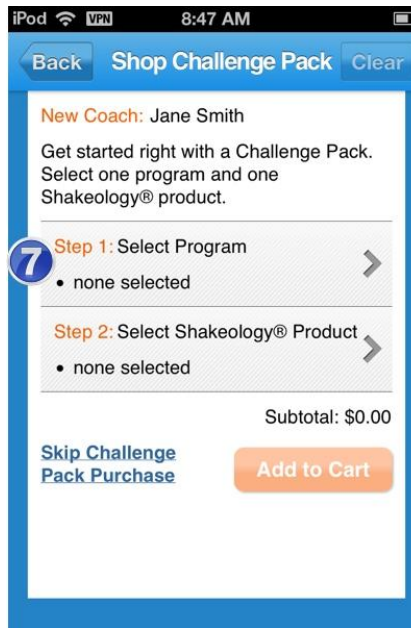
6. Choose **"Enroll Without Purchase"** to continue to review the order and enroll a Coach without a Beachbody

7. Review your order and hit **"Submit"**



Tip: Only a first name is required to continue to the next screen; however, it is good practice to always ask for a phone number. Especially if the number is connected to a mobile device then you have an easy way to follow-up with your new contact.

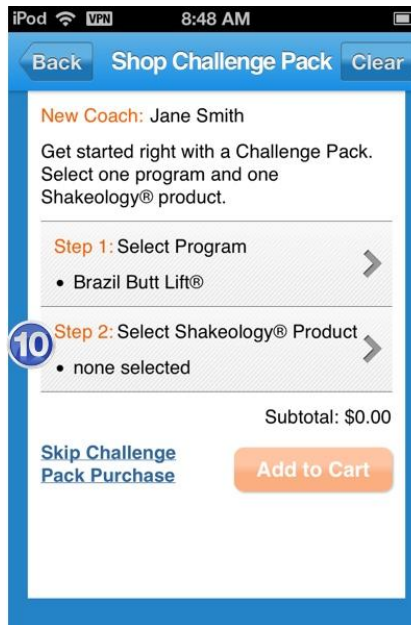
Scenario 2: Pre-enroll a New Coach with a Challenge Pack:



Steps 1- 5 repeat from Scenario 1

6. Select “**Shop Now**” to proceed to the next screen where your new contact will select the items for their Challenge Pack

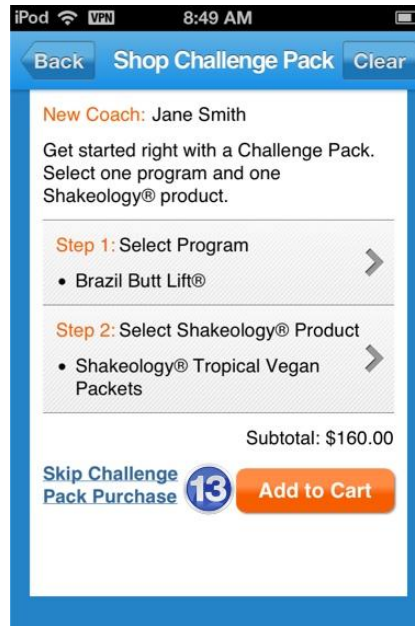
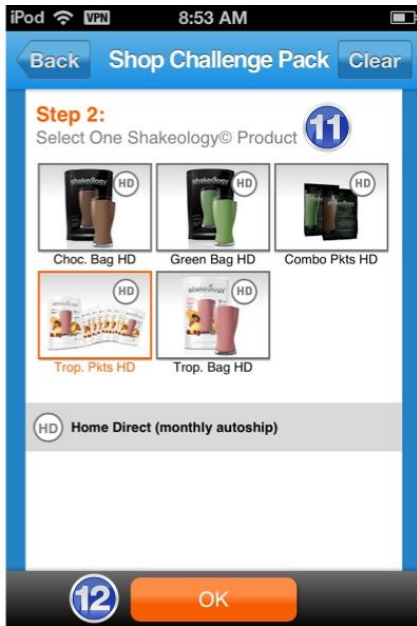
7. Select “**Step 1**” to be taken to the product selection page



8. Select which product your contact would like to include in their Challenge Pack

9. Select “**OK**”

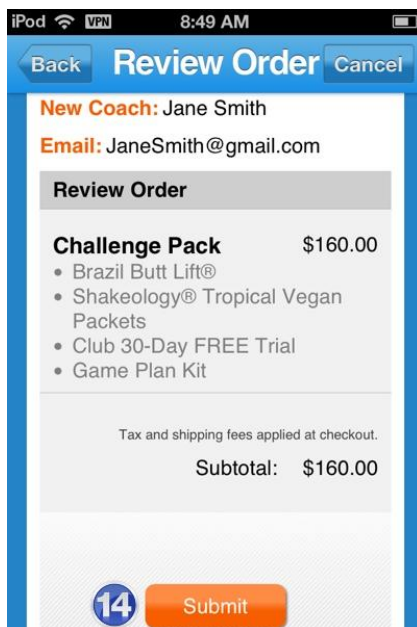
10. Select “**Step 2**” to be taken to the Shakeology product selection page



11. Select which Shakeology product your contact would like to include in their Challenge Pack

12. Select “OK”

13. Double check all your contact’s choices have been made and select “Add to Cart”



14. Review their choices for accuracy one last time and then hit “Submit”

15. You have now successfully pre-enrolled a new Coach with a Challenge Pack. Select “Enroll Another” if you want to repeat the process with another new contact

Scenario 3: Pre-enroll a New Customer with Free Team Beachbody Membership

While your contact may not be purchasing anything at the moment, once they complete their enrollment with you anything they purchase in the future will be connected to you!

1. Enter your contact's email into the email box.

2. Select **"Enroll New Customer"**

3. Enter your contact's first and last name

4. Enter their phone number

5. Ask them if their number supports text messaging. If yes, select this box

6. Choose **"Enroll Without Purchase"** to continue to final screen to enroll a Free Team Beachbody Member

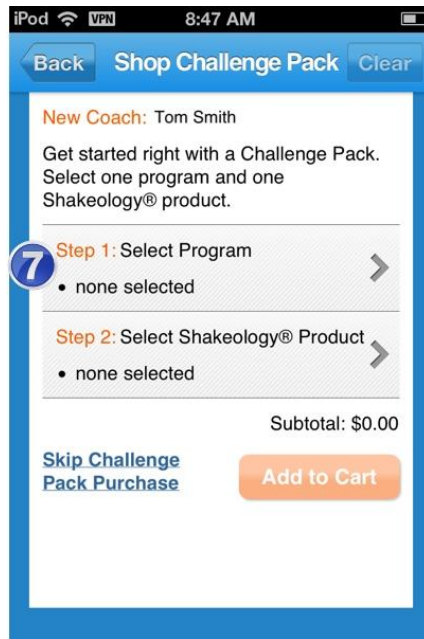
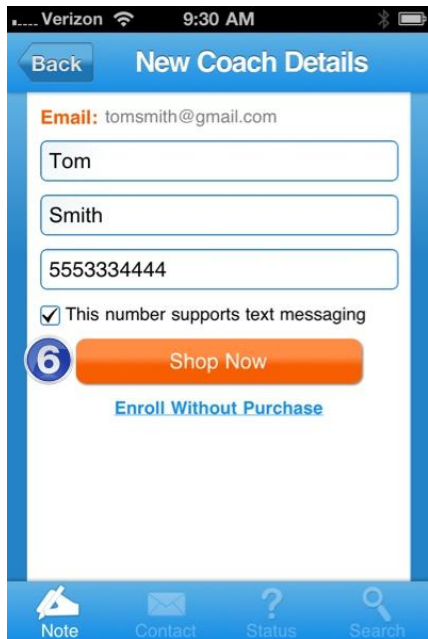
7. Review their order to make sure you pre-enrolled them for the FREE Basic Team Beachbody Membership

8. Hit **"Submit"** to complete their pre-enrollment

9. You just pre-enrolled your contact as a FREE Team Beachbody Member

Tip: This scenario is great as a last resort option. If your contact does not want to make any on the spot decisions or purchases, you can use this option as a way to obtain their contact information. This way you will receive commissions for any future transactions. You can also begin building a relationship with this contact by following up with them.

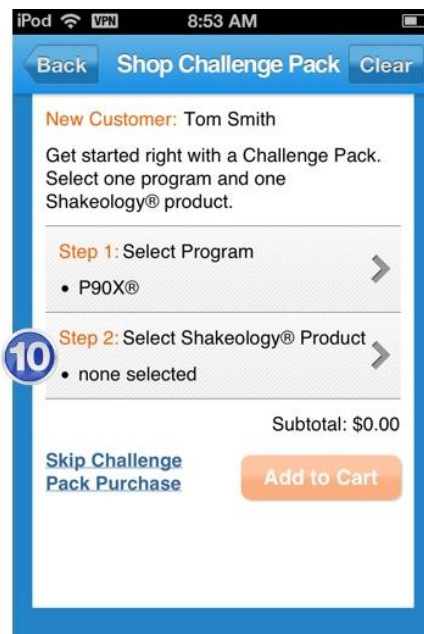
Scenario 4: Pre-enroll a New Customer with a Challenge Pack



For steps 1- 5 repeat from Scenario 3

6. Select “**Shop Now**” to proceed to the next screen where you will select the items for their Challenge Pack

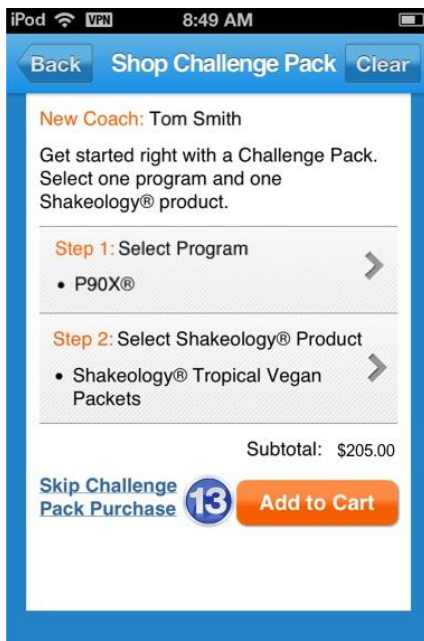
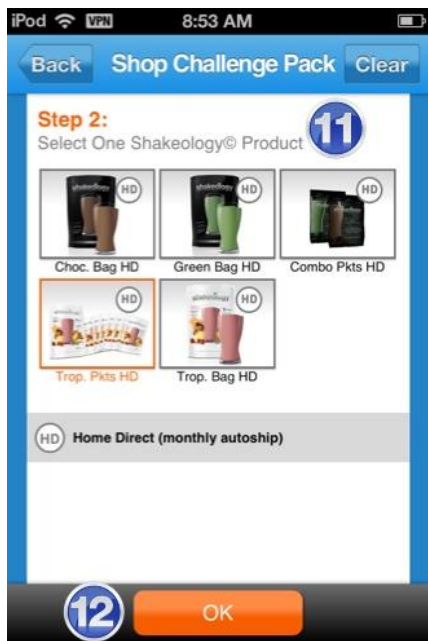
7. Select “**Step 1**” to be taken to the program selection page



8. Select the program your contact would like to include in their Challenge Pack

9. Select “**OK**”

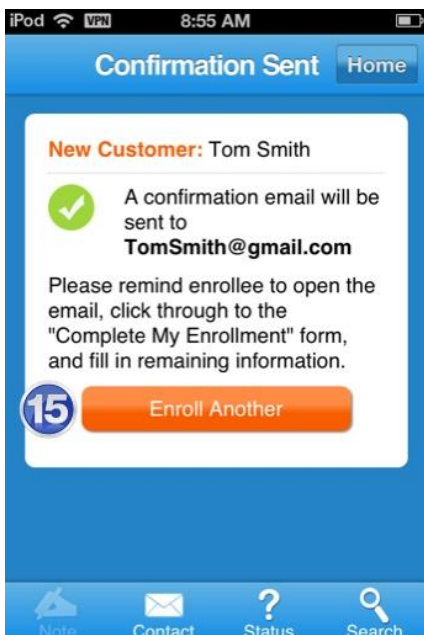
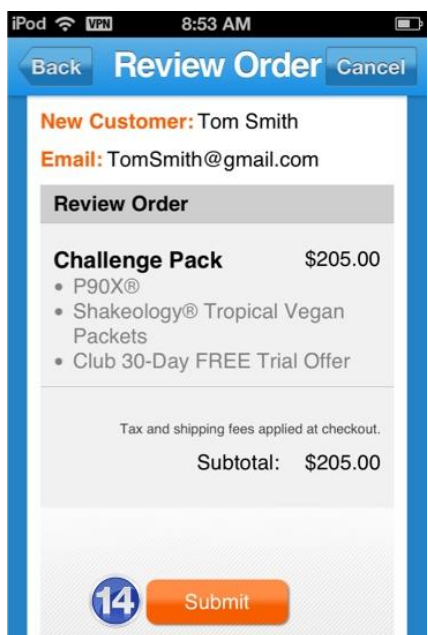
10. Select “**Step 2**” to be taken to the Shakeology product selection page



11. Select which Shakeology product your new customer would like to include in their Challenge Pack

12. Select “OK”

13. After all your new customer’s choices have been made, check for accuracy and then select “Add to Cart”



14. Review their choices one last time and then hit “Submit”

15. You have successfully pre-enrolled a new customer with a Challenge Pack. Select “Enroll Another” if you want to repeat the process with another contact

Tip: Notice that on the Review Order page your customer receives a Club 30-Day FREE Trial Offer. Make sure to inform your new customer that they will receive an email with a link to test out Club membership for 30 days and they will need to sign up for the feature separately from their enrollment.

Scenario 5: Pre-enroll New Coaches or Customers with Individual Product Selection

You can use this scenario when enrolling a Coach or customer who is not interested in a Challenge Pack but wants to purchase Shakeology, individual Beachbody Programs or Club Membership.

The screenshot shows the 'Home' screen of the app. At the top, there are tabs for 'About', 'Home', and 'Log Out'. Below the tabs, a message says 'Enter new enrollee's email address and choose New Coach or New Customer:'. A text input field contains 'katiesmith@gmail.com'. Below the input field are two large orange buttons: 'Enroll New Coach' and 'Enroll New Customer'. A blue circle with the number '1' is next to the email input field, and a blue circle with the number '2' is next to the 'Enroll New Customer' button. At the bottom, there is a navigation bar with icons for 'Note', 'Contact', 'Status', and 'Search'.

The screenshot shows the 'New Customer Details' screen. At the top, there are tabs for 'Back' and 'New Customer Details'. Below the tabs, the email 'katiesmith@gmail.com' is displayed. Below the email are three text input fields: the first contains 'Katie', the second contains 'Smith', and the third contains '1365557845'. A blue circle with the number '3' is next to the first name field, a blue circle with the number '4' is next to the last name field, and a blue circle with the number '5' is next to the phone number field. Below the phone number field is a checkbox labeled 'This number supports text messaging' which is checked. Below the checkbox are two orange buttons: 'Shop Now' and 'Enroll Without Purchase'. A blue circle with the number '6' is next to the 'Shop Now' button. At the bottom, there is a navigation bar with icons for 'Note', 'Contact', 'Status', and 'Search'.

1. Enter your contact's name into the email box

2. Choose either **"Enroll New Coach"** or **"Enroll New Customer."** The process for individual product selection is the same for both

3. Enter your contact's first and last name

4. Enter their phone number

5. Ask them if their number supports text messaging. If yes, select this box

6. Choose **"Shop Now"**

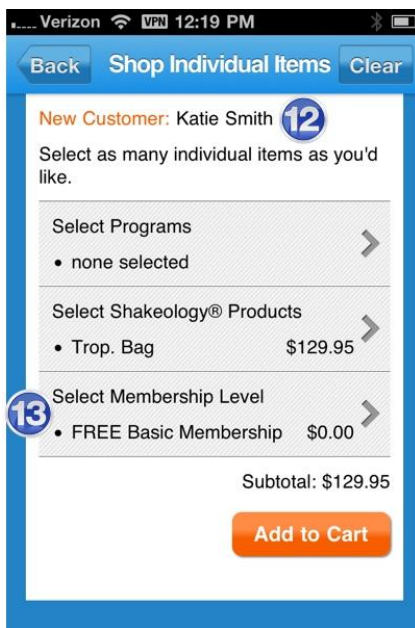
The screenshot shows the 'Shop Challenge Pack' screen. At the top, there are tabs for 'Back', 'Shop Challenge Pack', and 'Clear'. Below the tabs, the text 'New Customer: Katie Smith' is displayed. Below this, a message says 'Get started right with a Challenge Pack. Select one program and one Shakeology® product.' Below the message are two sections: 'Step 1: Select Program' and 'Step 2: Select Shakeology® Product'. Each section has a right arrow and a list with 'none selected'. Below these sections is a 'Subtotal: \$0.00'. At the bottom, there is a blue circle with the number '7' next to the text 'Skip Challenge Pack Purchase' and an orange 'Add to Cart' button.

The screenshot shows the 'Shop Individual Items' screen. At the top, there are tabs for 'Back', 'Shop Individual Items', and 'Clear'. Below the tabs, the text 'New Customer: Katie Smith' is displayed. Below this, a message says 'Select as many individual items as you'd like.' Below the message are three sections: 'Select Programs', 'Select Shakeology® Products', and 'Select Membership Level'. Each section has a right arrow and a list with 'none selected'. The 'Select Membership Level' section also shows 'FREE Basic Membership \$0.00'. Below these sections is a 'Subtotal: \$0.00'. At the bottom, there is a blue circle with the number '9' next to the text 'Skip Challenge Pack Purchase' and an orange 'Add to Cart' button.

7. When you reach the Shop Challenge Pack page make sure to select **"Skip Challenge Pack Purchase"** to continue on to the shop individual items page

8. Here you can choose the individual products your contact would like to select

9. In this case, Katie only wants Shakeology. Choose the Shakeology Products category to select the variety

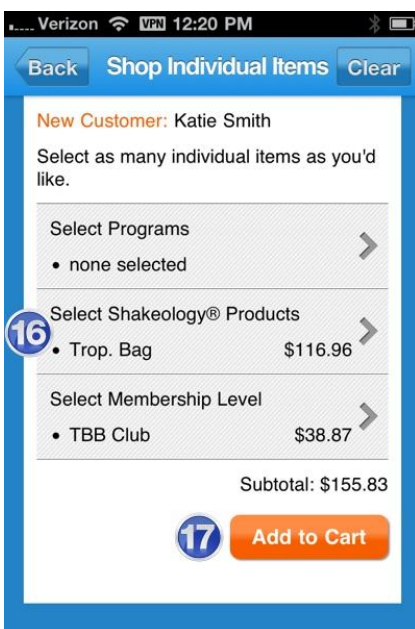


10. Select a Shakeology product

11. Select “OK”

12. Back on the individual items page you can add more to the order by repeating this process

13. To change or upgrade membership level choose “Select Membership Level”

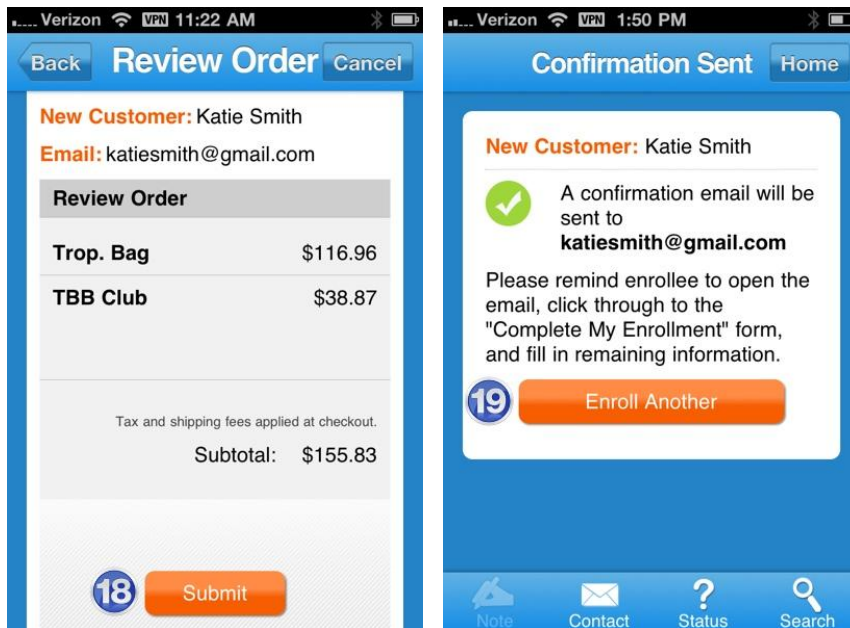


14. Select the box next to “Club Upgrade” to upgrade your Coach or customer to become a Club Member

15. Select “OK”

16. As you can see, the Club discount will be immediately applied to Katie’s Tropical Shakeology order

17. After checking for accuracy select “Add to Cart”



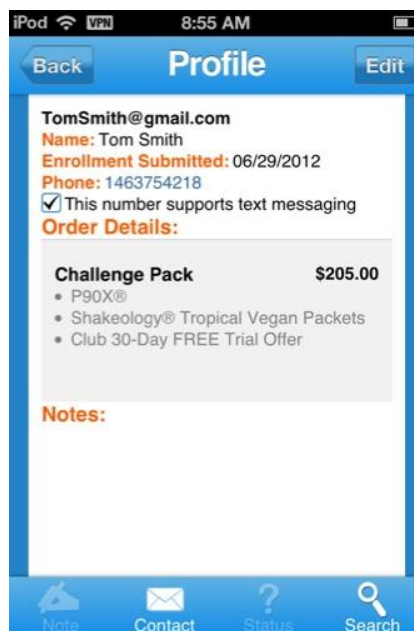
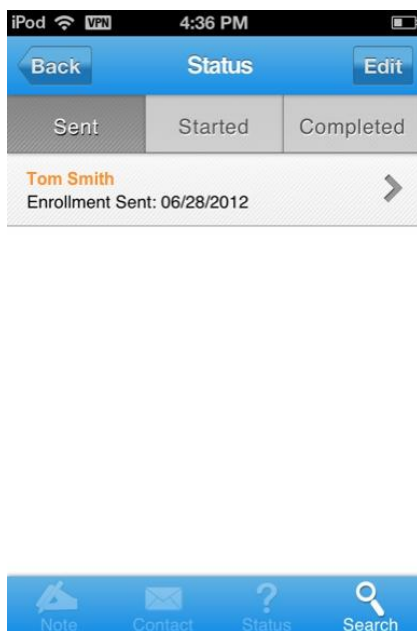
18. Hit “**Submit**” after you have reviewed the order

19. You have successfully enrolled a Coach or customer with individual product selection. Select “**Enroll Another**” if you want to repeat the process

Additional Features:

Keeping Your Contacts Organized:

One of the amazing features of the mobile app is the way it organizes contact information as your contacts progress through enrollment. In the Status portion of the mobile app you will be able to view which stage of enrollment a contact has completed. As you see here, Tom Smith is currently in the “**Sent**” category. That means he has been sent a confirmation



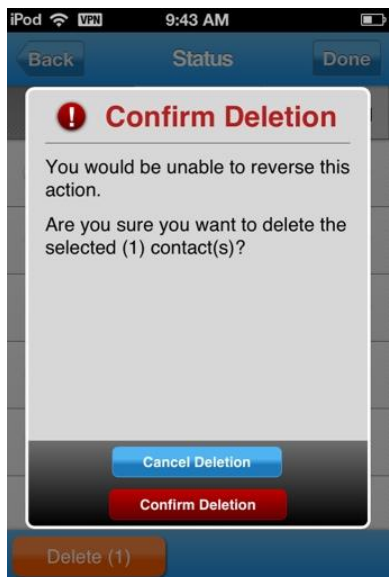
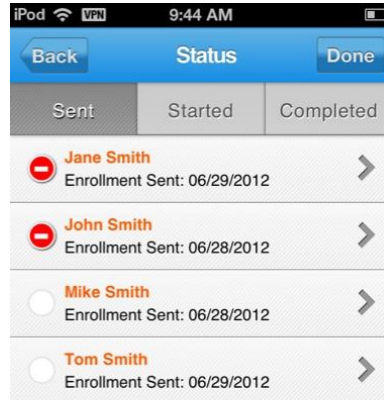
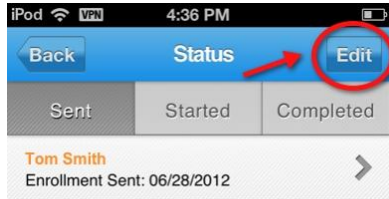
email and not started the enrollment process. If he had opened the email, he would be located in the “**Started**” category. If he have opened the link and completed the online form then he will be found in the “**Completed**” section.

All of a contact’s information is stored on their profile page. Notice that under “**Order Details**” it lists the products you sold to your customer. This information will be

extremely helpful when you follow-up with a phone call to continue to help them.

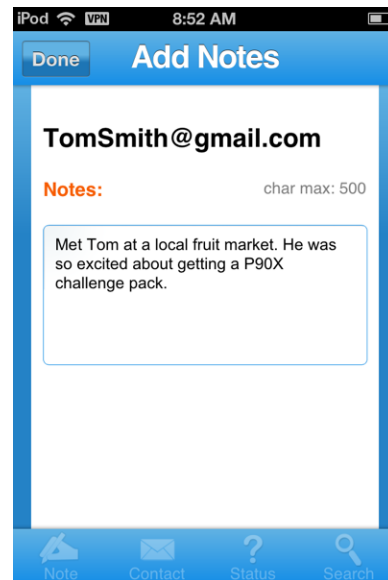
Deleting Contacts:

If you want to delete any contacts simply press the “**Edit**” button in the top right hand corner of the Status menu. Tap the gray circle at the left of each contact you want to delete and a red circle will appear in its place. After you have chosen which contacts you want to delete, tap “**Delete**” in the bottom left corner. The contacts that had the red circle next to their name are the only ones that will be deleted.



Don't worry if you delete someone accidentally, this screen will appear to ask you if you want to confirm any final deletions.

Coming Soon: You will have the ability to edit the Profile information by adding even more personal information about your contact to the “Notes” section. You can add specific details about where and how you met a new contact. When you follow-up with a contact the notes section will make it easier to pick up right where you left off.



Wrap up

This mobile app is a wonderful tool to make growing your business and increasing your contact base much easier. However, it is critical to remember that this app only pre-enrolls each contact. You must follow-up to confirm that they continue the process via the email link that the app generates. Only then will you truly have added a new Coach or customer.