

MOBILE ENROLLMENT FAQ & TRAINING GUIDE

What is the Mobile Enrollment Tool?

A web-optimized website that allows Coaches to pre-enroll* new Coaches and customers on-the-go. Through the tool, which can be accessed from any desktop computer, smartphone, or tablet, Coaches are able to:

- [Pre-enroll a new Coach](#)
- [Pre-enroll a new customer with a free Team Beachbody Membership](#)
- [Pre-enroll a new Coach or customer with a Challenge Pack](#)
- [Pre-enroll a new Coach or customer with individual Beachbody products](#)
- [Track the status of pre-enrollees throughout their enrollment process](#)

NOTE: Mobile Enrollment only allows Coaches to **pre-enroll** Coaches and customers. Coaches cannot use it to sell products to an existing customer, unless they are enrolling the customer as a new Coach.

How do I get the tool?

Simply visit Coachmobile.teambeachbody.com from a mobile device, tablet, or desktop computer. For easy access from your smartphone, bookmark the page or add it to your home screen.

Will I incur data charges for using this tool on my phone?

There isn't a fee to use Mobile Enrollment, but standard data charges apply.

Will I lose my Mobile Enrollment information if I get a new phone?

No. Because the tool is web-based, all your information will be stored in your account.

What if I get a call or text while using the tool on the iPhone?

If, when using the tool, you ignore any incoming call or text, you'll be able to continue whatever you were doing before the call or text came in. If you choose to accept the call or text, you will lose the information and have to re-enter it.

Can I view and manage my back office from this tool?

No. Although Mobile Enrollment uses your Coach login, it's separate from your back office and can't be used to manage it.

Can I download Mobile Enrollment in Spanish or French?

While there are U.S. and Canadian versions of the tool, English is the only language that is supported. This also applies to the products offered within Mobile Enrollment, as we currently do not offer any Spanish programs on the tool.

How do I use the tool?

Follow the step-by-step processes outlined below to pre-enroll new Coaches and customers, track their status through the enrollment process, and learn about other features within the tool.

*Pre-enroll: For privacy reasons you will not be entering credit card and billing information. Therefore, this initial step is only a pre-enrollment. Your contact has to finish the process via the link provided in the email this tool 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 Coach without a product purchase; OR Pre-enroll a new customer with a free Team Beachbody Membership

The first screenshot shows the 'Home' screen with a blue header containing 'About', 'Home', and 'Log Out'. Below the header, there is a text prompt: 'Enter new enrollee's email address and choose New Coach or New Customer:'. A checkbox is checked with the text 'Yes, I have permission to enter this enrollee's personal information.' Below this is an email input field containing 'TomSmith@gmail.com'. Two large orange buttons are visible: 'Enroll New Coach' (marked with a blue circle '1') and 'Enroll New Customer'. The bottom navigation bar includes icons for 'Note', 'Contact', 'Status', and 'Search'.

The second screenshot shows the 'New Coach Details' screen with a blue header containing 'Back' and 'New Coach Details'. It features an 'Email' field with 'TomSmith@gmail.com'. Below are input fields for 'Tom' (marked with a blue circle '2'), 'Smith', and '5552223333'. A checkbox is checked with the text 'This number supports text messaging'. A dropdown menu shows 'United States'. An orange 'Shop Now' button and a blue link 'Enroll Without Purchase' (marked with a blue circle '3') are at the bottom. The bottom navigation bar is identical to the first screenshot.

1. Enter your contact's email and select either **"Enroll New Coach"** OR **"Enroll New Customer"**
2. Enter your contact's first and last name, phone number (check the box if his/her number supports text messaging), and select whether the person lives in the U.S. or Canada
3. Choose **"Enroll Without Purchase"** to continue to review the order
4. Review your order and hit **"Submit"**

The 'Review Order' screen has a blue header with 'Back', 'Review Order', and 'Cancel'. It displays the following information: 'New Coach: Tom Smith', 'Email: TomSmith@gmail.com', and a 'Review Order' section. The order summary shows 'Coach Enrollment' for '\$39.95 USD'. Below this, it states 'Tax and shipping fees applied at checkout.' and 'Subtotal: \$39.95 USD'. At the bottom, there is an orange 'Submit' button (marked with a blue circle '4'). The bottom navigation bar is consistent with the previous screens.

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 so you have an easy way to follow-up with your contact.

Scenario 2: Pre-enroll a new Coach or customer with a Challenge Pack



Back New Coach Details

Email: TomSmith@gmail.com

Tom

Smith

5552223333

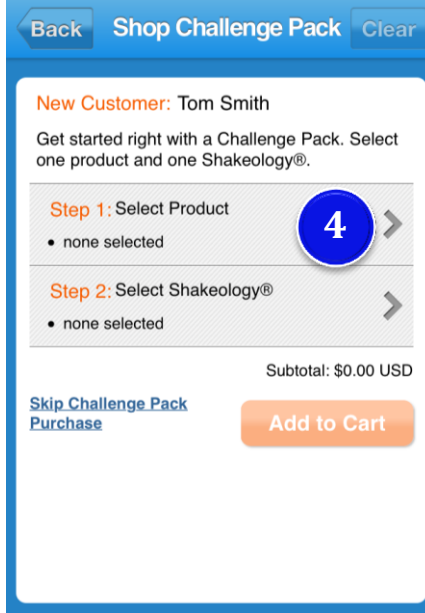
This number supports text messaging

United States

3 Shop Now

Enroll Without Purchase

Note Contact Status Search



Back Shop Challenge Pack **Clear**

New Customer: Tom Smith

Get started right with a Challenge Pack. Select one product and one Shakeology®.

Step 1: Select Product **4**

- none selected

Step 2: Select Shakeology®

- none selected

Subtotal: \$0.00 USD

Skip Challenge Pack Purchase

Add to Cart

Repeat steps 1–2 from Scenario 1.

3. Select **“Shop Now”** to proceed to the next screen where you will select the items for your new contact’s Challenge Pack

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

5. Select which product your contact would like to include in their Challenge Pack and hit **“OK”**

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



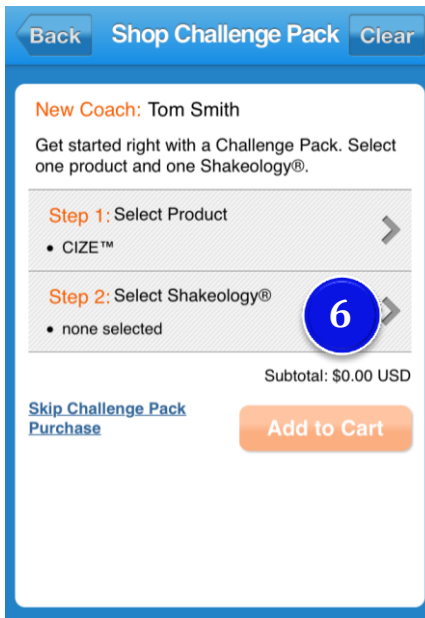
Back Shop Challenge Pack **Clear**

Step 1:

Select One Product and press 'OK' at the bottom of the page.

CIZE™ Kickstart	CIZE™	Club Kickstart
Club & Shakeology	21 DAY FIX	21 Day Fix® Kickstart
21 Day Fix EXTREME®	21 Day Fix EXTREME® Kickstart	Showcase Pack

5 OK



Back Shop Challenge Pack **Clear**

New Coach: Tom Smith

Get started right with a Challenge Pack. Select one product and one Shakeology®.

Step 1: Select Product

- CIZE™

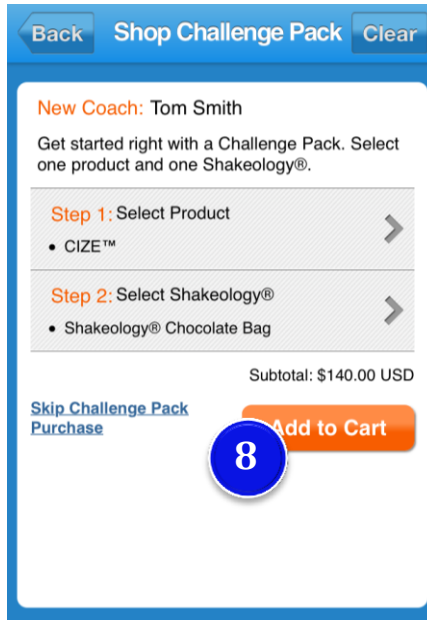
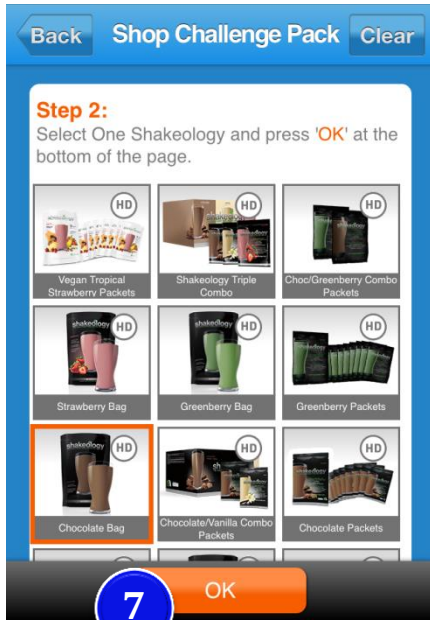
Step 2: Select Shakeology® **6**

- none selected

Subtotal: \$0.00 USD

Skip Challenge Pack Purchase

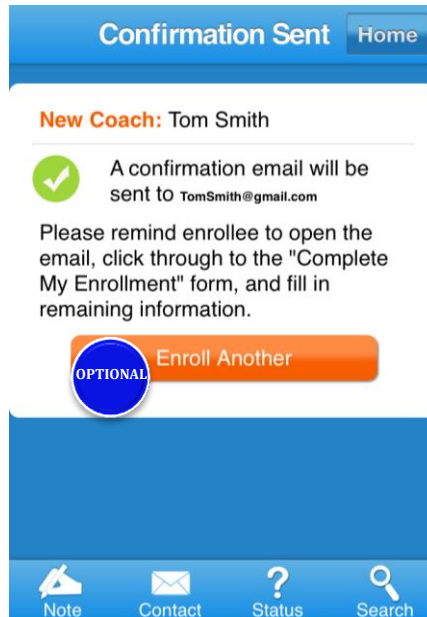
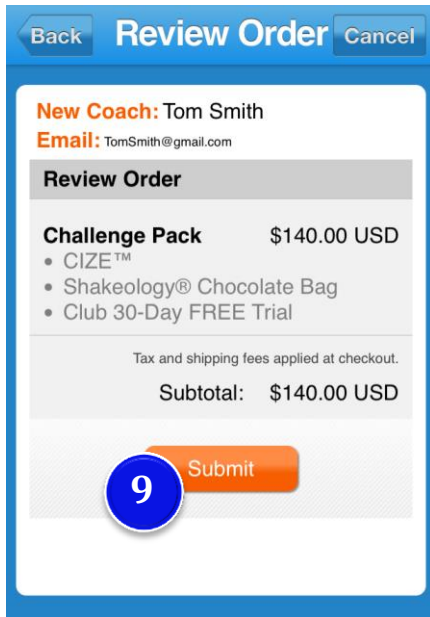
Add to Cart



7. Select which Shakeology product your contact would like to include in their Challenge Pack and hit “OK”

8. Double-check that all of your contact’s choices are correct and select “Add to Cart”

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



OPTIONAL: Select “Enroll Another” if you want to repeat the process with a new contact

Scenario 3: Pre-enroll a new Coach or customer 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 a Club Membership.

Back New Coach Details Clear

Email: katiejohnson@gmail.com

Katie

Johnson

2223336464

This number supports text messaging

United States

3 Shop Now

Enroll Without Purchase

Note Contact Status Search

Back Shop Challenge Pack Clear

New Coach: Katie Johnson

Get started right with a Challenge Pack. Select one product and one Shakeology®.

Step 1: Select Product

- none selected

Step 2: Select Shakeology®

- none selected

Subtotal: \$0.00 USD

Skip Challenge Pack Purchase Add to Cart

4

Repeat steps 1–2 from Scenario 1.

3. Choose “Shop Now”

4. Select “Skip Challenge Pack Purchase” to continue on to the “Shop Individual Items” page

5. Choose the fitness program, Shakeology product, and/or Team Beachbody Membership level requested by your contact. Then select “Add to Cart”

Back Shop Individual Items Clear

New Coach: Katie Johnson

Select as many individual items as you'd like.

Select Products

- Focus T25 \$89.89 USD

Select Shakeology®

- none selected

Select Membership Level

- FREE Basic Membership \$0.00 USD

Business Starter Kit \$39.95 USD

Subtotal: \$129.84 USD

5 Add to Cart

Back Review Order Cancel

New Coach: Katie Johnson

Email: katiejohnson@gmail.com

Review Order

Focus T25 \$89.89 USD

Business Starter Kit \$39.95 USD

Tax and shipping fees applied at checkout.

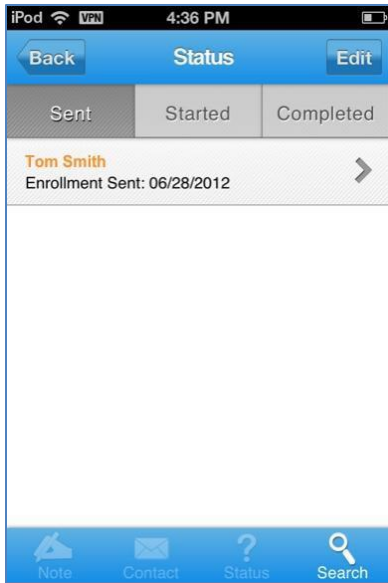
Subtotal: \$129.84 USD

6 Submit

6. Select “Submit” after you have confirmed the order

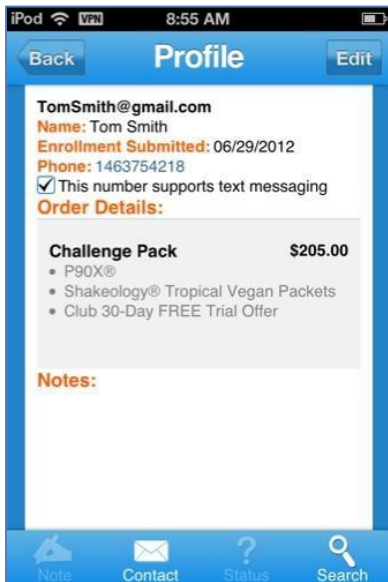
ADDITIONAL FEATURES:

Status of Enrollment



Mobile Enrollment will display where your new customers or Coaches are in the enrollment process. Under the “**Status**” section of the tool you will see three tabs, Sent, Started, and Completed. The Sent category will list people that have received their enrollment email, but have not yet opened it. The Started category lists people who have opened their enrollment email, but have not yet completed the enrollment process. Finally, the Completed category will list everyone who has received their email and completed their online enrollment form.

Viewing Contacts Profile Information



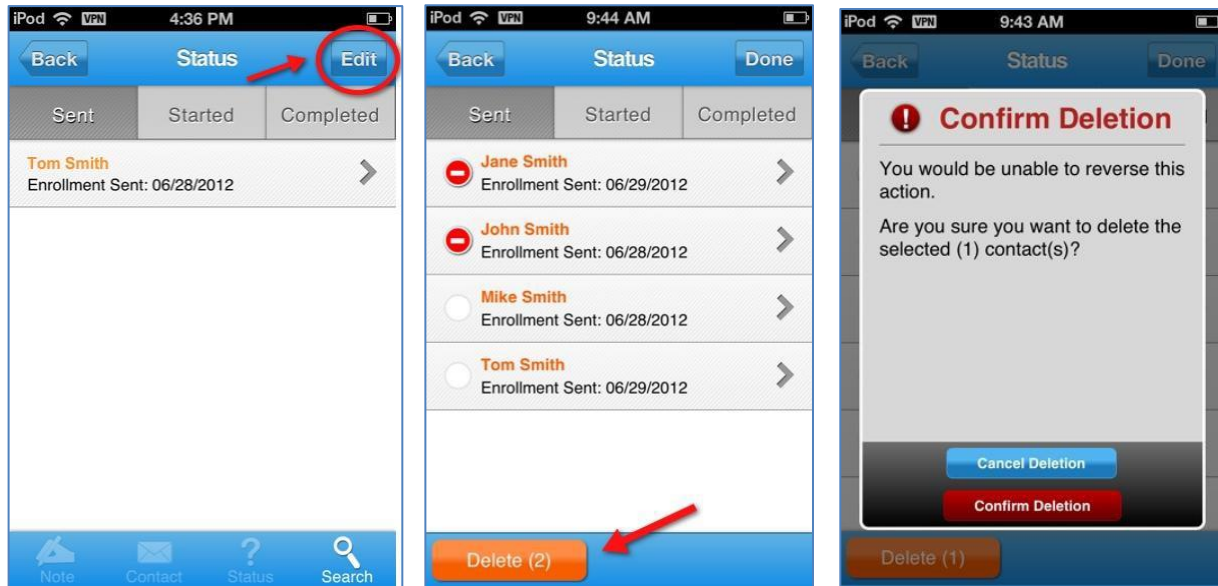
You can click on one of your contacts to see their information on the profile page.

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 them on their order.

You can add information to the “**Notes**” section, such as details about where and how you met, what the person is struggling with, what their goals are, etc. Adding notes will also be helpful when you follow-up to make it easier to pick up right where you left off and make the personal connection.

Deleting Contacts:

If you want to delete a contact, select 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. Confirm the contact(s) you want to delete one last time. The contacts that had the red circle next to their name are the only ones that will be deleted.



Modify Orders

You can modify an order at any time before your Coach or customer completes it. To modify, select the **"Status"** tab located at the bottom of the screen. Then click on the customer or Coach whose order you'd like to revise from the **"Sent"** or **"Started"** section (you won't be able to modify orders under the **"Completed"** page because they have already submitted their order). From the individual's profile page you can review and modify their order by selecting the **"Contact"** tab, followed by **"Modify Enrollment."** This will take you to the start of the mobile enrollment process, where you can edit the order.

