

# Client Support Documentation

October 4, 2019



# Contents

<b>Welcome to GymMaster Software</b>	<b>8</b>
<b>GymMaster Contact Information</b>	<b>8</b>
<b>Dashboard</b>	<b>12</b>
Staff Access Rights . . . . .	12
User Administration . . . . .	12
Dashboard . . . . .	12
Reports . . . . .	12
Schedule . . . . .	13
Class Management . . . . .	13
Add Class Attendees . . . . .	13
Class Communication . . . . .	13
Edit or Cancel Class . . . . .	13
Print Class Enrollment . . . . .	13
Building a Dashboard . . . . .	14
Report Data . . . . .	14
<b>Club Details</b>	<b>16</b>
Club Details . . . . .	16
Logos and Branding . . . . .	16
Email Template . . . . .	16
Language, Time Zone, Formats . . . . .	16
Till Float . . . . .	16
Member Portal Redirect . . . . .	16
Billing Provider Set Up . . . . .	16
Key Tag Sounds . . . . .	16
Maintenance Fee . . . . .	16
<b>Staff Attendance</b>	<b>19</b>
Staff Key Tags . . . . .	19
Facility Hours and Access . . . . .	19
Staff Check In / Out . . . . .	19
Door, Resource Staff Availability . . . . .	19
Timesheets . . . . .	19
Timesheets . . . . .	19
Staff Absence . . . . .	19
Adjustments . . . . .	19
Wages/Pay . . . . .	19
<b>Membership Settings</b>	<b>22</b>
View Memberships . . . . .	22
Add Memberships . . . . .	22
Edit Memberships . . . . .	22
Print Memberships . . . . .	22
View Division List . . . . .	22
Membership Payment . . . . .	22
Membership Lengths . . . . .	22

Membership Age Restrictions . . . . .	22
Membership Cancellation Fee . . . . .	22
Membership Lengths . . . . .	22
Discontinue Membership . . . . .	22
<b>Members</b>	<b>23</b>
Add a Member . . . . .	23
Add a Prospect . . . . .	23
Add Member Photo . . . . .	23
Purchase Key Tags . . . . .	23
Assign Key Tags . . . . .	23
Add SMS and Email Contact Function . . . . .	23
Add Emergency Contact . . . . .	23
Add Member Notes . . . . .	23
<b>Member Overview Panel</b>	<b>24</b>
Add a Member's Photo . . . . .	24
Manual Check In . . . . .	24
View Visit History . . . . .	24
Make a Booking . . . . .	24
Process a Point of Sale Purchase . . . . .	24
Account Summary . . . . .	24
Membership Summary . . . . .	24
Shared Member Accounts . . . . .	24
<b>Add Staff Members</b>	<b>25</b>
Add a Staff Member . . . . .	25
<b>Find a Member</b>	<b>26</b>
Find a Member . . . . .	26
Find an Expired Member . . . . .	26
Find a Cancelled Member . . . . .	26
Find Recent Visitors . . . . .	26
Find a Prospect . . . . .	26
All Members . . . . .	26
<b>Member Search Filters</b>	<b>27</b>
Search Alphabetically . . . . .	27
Search by Name . . . . .	27
Search by Join Date . . . . .	27
Search by Most Recent Update . . . . .	27
Search Filters . . . . .	27
<b>Member Details</b>	<b>28</b>
Members vs Memberships . . . . .	28
Membership Details . . . . .	28
Account and Billing History . . . . .	28
Member Billing Details . . . . .	28
Member Communication History . . . . .	28
View or Add Appointment Bookings . . . . .	28
View or Add Measurements and Progress . . . . .	28
View or Add Personal . . . . .	28

View PT Programs . . . . .	28
View Training Schedules . . . . .	28
View Member Questionnaires . . . . .	28
<b>Memberships</b>	<b>29</b>
Current Memberships . . . . .	29
Add a Membership . . . . .	29
Interclub Memberships . . . . .	29
Member Benefits . . . . .	29
<b>Shared &amp; Linked Memberships</b>	<b>30</b>
Linked Memberships . . . . .	30
Shared Memberships . . . . .	30
<b>Gifted Times and Holds</b>	<b>32</b>
Holds vs Gifted Time . . . . .	32
Add a Hold . . . . .	32
Hold Limits . . . . .	32
Add Gifted Time . . . . .	32
<b>Membership and Member Tag Actions</b>	<b>34</b>
Manual Check In . . . . .	34
View Visit History . . . . .	34
Stop At Gate . . . . .	34
Issue Additional Tags . . . . .	34
Add Member Photo . . . . .	34
View Historic Addresses . . . . .	34
Update Passwords . . . . .	34
View Linked Members . . . . .	34
View Member's Activity Log . . . . .	34
Merge With Another Member . . . . .	34
Add Signature . . . . .	34
Review Agreement Status . . . . .	34
Login to Member Portal . . . . .	34
View Member's Billing Report . . . . .	34
View Member Account Summary . . . . .	34
Delete Member . . . . .	34
Write Off or Zero Account Balance . . . . .	34
<b>Financial Configuration</b>	<b>35</b>
Payment Methods . . . . .	35
Add Payment Methods . . . . .	35
Billing Providers . . . . .	35
Tax Rates . . . . .	35
Add Tax Rates . . . . .	35
Tax Rate Components . . . . .	35
Cash Drawer Values . . . . .	35
Accounting Lock Period . . . . .	35
<b>Accounts</b>	<b>39</b>
Add a Payment . . . . .	39
Prepay Membership . . . . .	39

Make an Account Adjustment . . . . .	39
Refund Payment . . . . .	39
Reverse a Sale . . . . .	39
Preview Billing . . . . .	39
View, Print, Email Account Statement . . . . .	39
View Account History . . . . .	39
View Outstanding Charges . . . . .	39
Zero Account . . . . .	39
Process a Payment . . . . .	39
Email Member Invoice . . . . .	39
View Payments . . . . .	39
View Billing . . . . .	39
Void or Edit Charges . . . . .	39
View Unbalanced and Voided Transactions . . . . .	39
<b>Billing</b>	<b>41</b>
Add Billing Provider . . . . .	41
Add or Edit Payment Method . . . . .	41
Maintenance Fee . . . . .	41
Maximum Billing Amount . . . . .	41
Deadline for Owing . . . . .	41
Billing Comments . . . . .	41
Set Member as Bad Debtor . . . . .	41
Blacklist Member . . . . .	41
<b>Communication</b>	<b>43</b>
View Member's Communication History . . . . .	43
Search Communication History . . . . .	43
Add Note . . . . .	43
Add Task . . . . .	43
Add Call Log . . . . .	43
Add File to Member's Communication History . . . . .	43
Send Email to Member . . . . .	43
Send SMS to Member . . . . .	43
View Member's Agreements . . . . .	43
View, Print, Delete Emails . . . . .	43
<b>Templates</b>	<b>44</b>
Email Templates . . . . .	44
SMS Templates . . . . .	44
Templates Categories . . . . .	44
<b>Template Fields</b>	<b>45</b>
Template Fields . . . . .	45
Using Fields . . . . .	45
<b>Forms and Waivers</b>	<b>46</b>
Standard Forms . . . . .	46
Terms and Conditions . . . . .	46
Waivers . . . . .	46
Questionnaires . . . . .	46
Custom Forms . . . . .	46

<b>Visitors</b>	<b>48</b>
Pop Up . . . . .	48
View Member's Visit History . . . . .	48
View Tailgaters . . . . .	48
View Interclub Visitors . . . . .	48
Print Visit Report . . . . .	48
Manually Open Door . . . . .	48
Change Door Status . . . . .	48
 <b>Bookings and Schedules</b>	 <b>49</b>
Bookings and Schedules . . . . .	49
Meetings . . . . .	49
Add/Manage Resources . . . . .	50
Resource Groups . . . . .	51
 <b>Classes</b>	 <b>52</b>
Classes . . . . .	52
Online Bookings . . . . .	52
Restrictions/Limitations . . . . .	52
Cancellations . . . . .	52
Services . . . . .	54
Trainer Commissions . . . . .	54
 <b>Point of Sale / POS</b>	 <b>55</b>
Process Customer Purchase . . . . .	55
Select Payment Type . . . . .	55
Manage Receipts . . . . .	55
Add / Edit / Remove Products . . . . .	55
Process Stock-take . . . . .	55
Add Stock Delivery . . . . .	55
Manage Vouchers . . . . .	55
 <b>Report and Till</b>	 <b>56</b>
Standard Reports . . . . .	56
Create New Reports . . . . .	56
Save Reports . . . . .	56
Auto-Run Reports . . . . .	56
Export Reports . . . . .	56
Contact Report Members . . . . .	56
Print Report . . . . .	56
 <b>Tasks</b>	 <b>57</b>
What is a Task . . . . .	57
Task List . . . . .	57
Task Triggers and Setup . . . . .	57
New Tasks . . . . .	57
Assigning Tasks . . . . .	57
Email Pending Tasks . . . . .	57
Refresh Task List . . . . .	57
Print Task List . . . . .	57
Completing Tasks . . . . .	57
Follow Up Tasks . . . . .	57

<b>Stock</b>	<b>58</b>
View Stock on Hand . . . . .	58
Print Stock Report . . . . .	58
Do Stock Take . . . . .	58
Print Stock Take . . . . .	58
Input Stock Delivery . . . . .	58
<b>Member Portal</b>	<b>59</b>
Member Portal Setup . . . . .	59
Member Portal Settings . . . . .	59
New Member Enquiries . . . . .	59
Member Referrals . . . . .	59
Sign Up New Members . . . . .	59
<b>Access Control</b>	<b>61</b>
Gatekeeper . . . . .	61
Components . . . . .	61
Installation . . . . .	61
Placement . . . . .	61
Trouble Shooting . . . . .	61
Door Set Up . . . . .	62
Access Control . . . . .	62
Door Access Summary Report . . . . .	62
Concessions vs Visits . . . . .	62
Booking Access . . . . .	62
Exclusions / Restrictions . . . . .	62
Tailgating Setup . . . . .	62
Status Report . . . . .	62
Restart / Reboot Gatekeeper . . . . .	62
<b>Feedback</b>	<b>64</b>

## Welcome to GymMaster Software

We're happy to have you join the team! This document is your guide to where you can find common tasks in the day to day running of your gym or club.

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## Glossary

**Accrued Revenue** Accrued revenue is a sale that has been recognized by the seller, but which has not yet been billed to the customer. ... Accrued revenue is not recorded in cash basis accounting, since revenue is only recorded when cash is received from customers. (a charge or cost relating to work done but not yet invoiced) made provision for at the end of a financial period

**API** API (or application programming interface) is a set of functions and procedures allowing the creation of applications that access the features or data of an operating system, application, or other service. In general terms, it is a set of clearly defined methods of communication among various components

**Billing Providers** The billing provider is the provider who actually performs the service. They're the ones the member pays their membership fees to. They're the ones who hold the members card or bank details. With GymMaster integrating with certain billing providers, we provide the link between the two. GymMaster is effectively the "middle man" and tells the billing provider who to bill, how much to bill them and when to bill them

**Booking Service** A booking service is a booking made for one person. A one on one, personal booking made with a Trainer or instructor. This may be a personal training session, a massage, or a tanning session

**Cancellation** A cancellation is when a membership (or booking, or class) has been cancelled/deleted. If a membership has been cancelled, this may mean the member has gone elsewhere and/or ended their membership for a particular reason. Cancellations are different to expirations, as you're cancelling the membership early (in a sense). An expiring membership is reaching the end of it's preset term

**Charge/s** A Charge is a fee that has been charged to the member's account. These reasons may vary from a certain booking they have made, a prorata charge from a hold they have added. Or it may just be a regular, monthly charge for their membership. All charges to the member, will then need to be billed. A charge does not mean that member has been billed that amount or already paid that amount

**Class** A Class is a booking made for more than one person. Whether it be just a small yoga or group PT session, or a larger zumba class. If more than one member can book this particular session, it needs to be created as a class

**Debtors** Debtors are members that owe you money. They may owe you money for a booking, a class, or a product they have purchased via the POS. They may have an owing balance on their regular membership. Any time something is charged to your member, if it takes them below \$0, they are in debt to you

**Expiry** The expiry date, is the end of the period for which something is valid. If someone's membership is due to expire on July 15th, then it will no longer be valid after that date. The member will not have an active membership unless they renew or purchase a new one

**First Payment Date** The first payment date is the date you wish to take the first payment of the membership. This may be some time in the future and not on the day sign up took place. For example, the member may be signing up to a new. monthly membership on the 2nd, but their pay day is on the 15th. The first payment date may be scheduled for the 15th so it's

convenient for the member going forward

**Free Time/ Gifted Time** Gifted Time is used when you're gifting a member a certain free period of time. This could be two weeks free for a promotion, or a week free for referring a friend, for example. Gifted time is simply added to the members account. Therefore, during this time, access to the facility can still be granted

**Gatekeeper** Gatekeeper is the hardware used to manage access to your facility by providing a connection between the Member's tags, and your Gymmaster application.

**Hold / Suspension** Adding a hold, or freezing an account is often mistaken for adding gifted time. The main difference being, you're holding / postponing their membership and access will not be granted to the facility during this time. This may be due to an operation, an injury or a holiday for example

**KPI or Key Performance Indicators** A Key Performance Indicator is a type of performance measurement. KPIs evaluate the success of an organization or of a particular activity in which it engages. E.g. Cancellations, New Members, Online sign ups, Classes booked

**Members and Memberships** A Member is an individual who has, is or will visit your facility depending on their Membership status. A Membership is a contractual agreement for use of your facility, and a Member may therefore have multiple Memberships.

**Open-Ended** If something is Open ended, it has no end date. These would be regular, ongoing memberships that need to be cancelled by either party if and when needed

**Payment/s** A payment that the member has paid. Whether it be a payment for their membership, a payment for a booking, or a payment for a class. All payments, are payments made to the facility

**Prorata/Upfront Fee** Prorata (meaning in proportion), is the term used in many legal and economic contexts. Suppose the monthly membership fee is \$40.00. The prorata fee would be a "part charge" of that \$40.00. A lot of facilities do this so every member pays the exact same amount, regardless of which day they joined. If the person was only a member for 15 out of the 30 days of the month, the prorata fee would be \$20.00. If this setting is selected, GymMaster will work out these calculations for you

**Renewal** The renewal of something in GymMaster, is effectively repeating it again. If someone's "3 month membership" is up for renewal on July 15th, then it will no longer be valid after that date. The member will not have an active membership unless they renew that membership again for another 3 months

**Resource** A resource is a room or area in which services, classes and meetings can be scheduled. If you hold a few classes at similar times, or there's a possibility / option for multiple bookings overlapping, then you'll need enough resources to cover these bookings. Eg, Studio 1, Studio 2, Gym Space, Massage Room. Or Court 1, Court 2, Court 3, Court 4 etc. A Trainer or staff member can also be resource, allowing their time to be booked / managed

**Schedule** Your schedule is your plan for carrying out a process or procedure, giving lists of intended events and times. Or to arrange or plan for something to take place at a particular time. Your schedule can include all activities in all of your rooms (resources) and all of your Trainers bookings and personal work schedules

**Start Date** The start date of a membership is when the member wants to start using that membership. When it is valid from. This can be different to the joining date. A member may come in and sign up/ join the facility on the 5th of the month, but not want their membership to start until the 30th of the month. This would mean if you have your upfront/sign up fees to be collected on “membership start date”, these will not be due until 30th

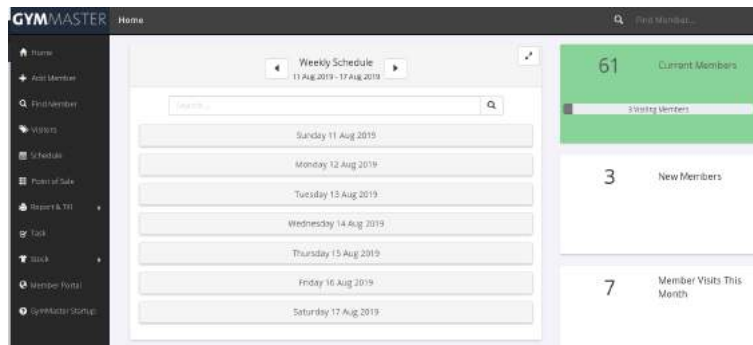
**Termination** The action of terminating something (ending, closing, concluding, finishing, stopping)

**X Report** X reports cover everything from the shift opening until when the report is run. An X report would be run by a staff member ending their shift. Ie 10am - 4pm

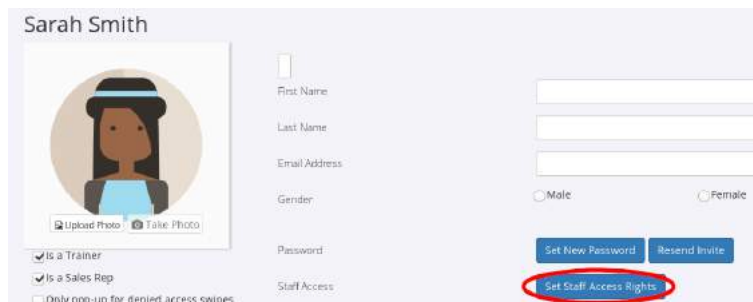
**Z Report** Z reports cover the entire shift from open to close. A Z report would be run by a staff member at the end of the business day. Ie 5am - 6pm You cannot complete a Z report without running an X report.

## Dashboard

The Home menu is where you will find your Dashboard and access to Reports and metrics to assist in the day to day running of your facility.



Individual Dashboard views for different staff can be set via the Settings - User Administration menu, by first selecting the Staff Member, and then Set Staff Access Rights.



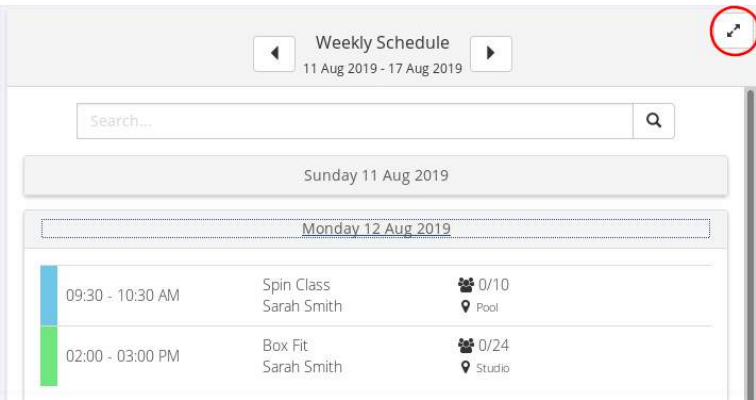
The Staff Access Rights menu allows for many different settings to be managed for individual Staff Members, using predefined access levels, from the drop-down menu.

Descriptions of each are provided, to assist in choosing the correct access levels, depending on the Staff Member's roles and responsibilities, and consist of 4 levels - No Access, Basic, Intermediate, or Admin - which provides full access to all settings, data and metrics related to your facilities operation.

[Table of Contents](#)

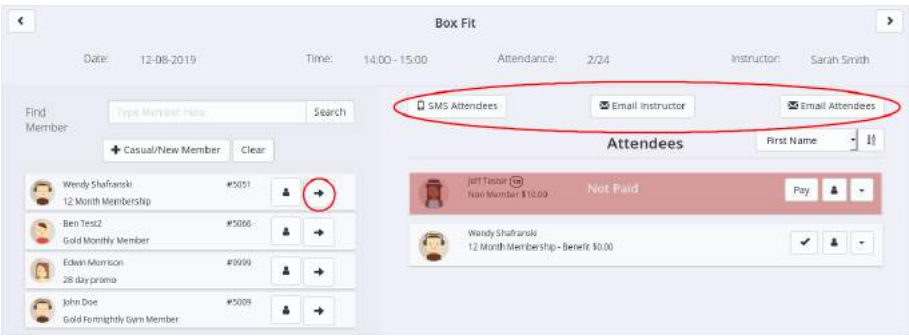
Role Group	Role	Description
Member	Admin	Allows full access to the member section. It is designed for trusted staff to make changes to all areas including sensitive information within the software without restriction. Typical users would be CFO, Manager, Accounts Person.
	No Access	
Schedule	Restricted	
	Basic	Allows full access to the Schedule section. It is designed for trusted staff to make changes to all details including sensitive information without restriction. Intended for Managers and Owners.
	Intermediate	
Task	Sales	Allows full access to the Task section. It is designed for trusted staff to make changes to all details including sensitive information without restriction. Such staff include Managers.
	Trainer	
	Limited Sales	
Point Of Sale	Kiosk	
	Admin	Allows full access to the POS, Till Take, and input Stock Delivery sections. It is designed for trusted staff to make changes to all details including sensitive information without restriction. Such staff include Manager.

The Weekly Schedule is displayed at the top of the Dashboard screen. Each day's Class bookings can be displayed by selecting the date, or alternatively, the entire schedule can be expanded to show all Bookings for the next week, using the double arrow icon.



Selecting a Class in the schedule, brings up a class management screen where Casual, New or current Members can be added to the Class. Previous attendees of the class are also displayed and their profile can be viewed, or they can be quick added to the Class using the arrow button.

Communication by SMS or Email to the class attendees is available from this screen, and the Instructor can also be emailed from the right hand menu options.



Classes can be Cancelled or Edited from the menu options at the bottom of the screen, and a Class Enrollment form can also be printed, to allow for classes to be booked in manually.



There are a number of Metrics available to be displayed graphically in the Dashboard configuration settings, covering various aspects of Billing, Payments, Bookings, Attendance, Meetings, Cancellations, Prospects, Classes, and Financials, each of which can be selected and arranged to suit via the Customize Dashboard option, below the last Card or Graph on the right hand panel.

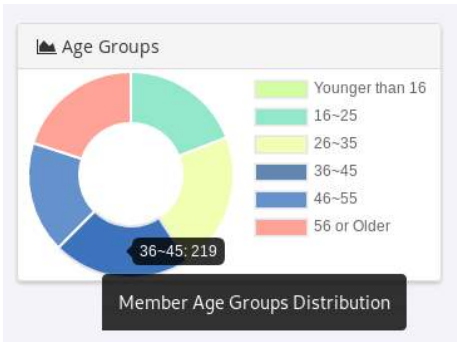


Where a Metric is linked to a Report, the Card or Donut will display a link to that Report.

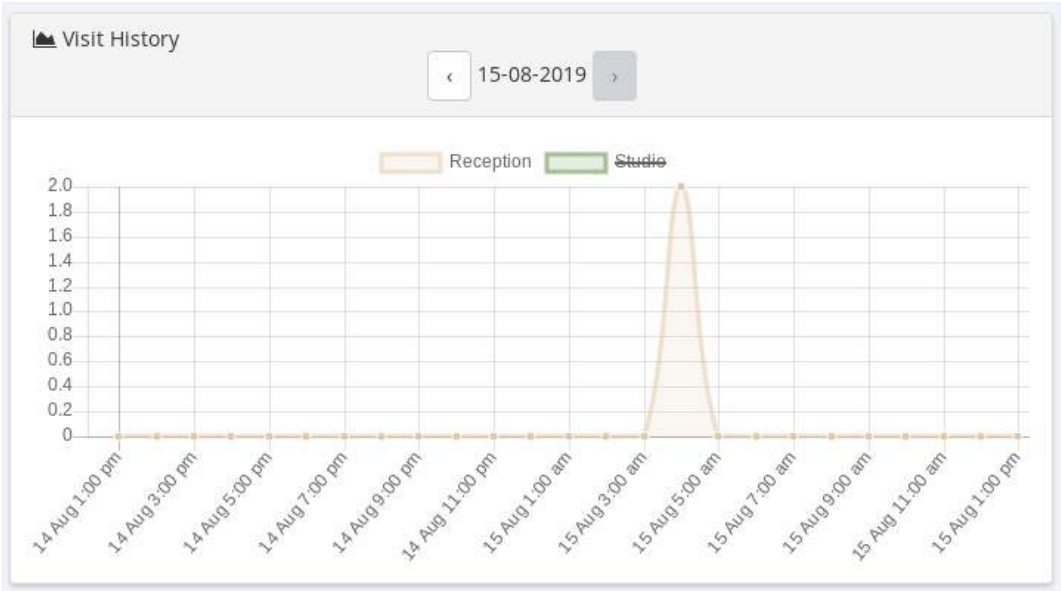
For example, the Current Members card links through to the Current Members report, showing a detailed breakdown of all current members and their associated membership data.

It is important to note that the Current Members report is a snapshot of all Member statuses (eg Casual, Current and Non-Members), and it is therefore recommended that it is run for a single date, rather than a date range. As Cancellations or New Memberships are generally not actioned instantly, there may be minor differences in reported figures between Historic, Cancelled, New, Future and Current Members - all of which have slightly different definitions for reporting.

Hovering over a value in a Card or Donut will display additional text describing both the Metric and the Value selected. In the case of an Age Group Donut for example, added detail is displayed relating to the value and category of the selected item, as well as the Description of the graph or card. In this case - the age bracket, count, and the metric being displayed.



When viewing a graph, data can be added or excluded by selecting the variable directly on the graph.



In the example of a Visit History report, a particular door can be excluded from the report by clicking it to show a strike-through, which then removes it from the data being displayed.

# Club Details

The screenshot shows the 'Club Details' form in the GymMaster application. At the top, there's a header bar with 'Club Details', a search bar for 'Find Member...', and a 'Settings' button. Below the header, there are four tabs: '+ Add Additional Club', 'GymMaster Cancellation', 'GymMaster Change Ownership', and 'GymMaster Payments'. The 'Club Name' section is active, displaying a grid of input fields for club and account information. The club details include Club Name, Legal Name, Address Search (with a placeholder 'Enter company address'), Address, Suburb, City, Post Code, and Country (with a dropdown menu). The account details include Account Name, Account Bank, Account Branch, Account Number, and Account Suffix. A note at the bottom states 'The current currency is: NZD'.

Settings - Club Details holds all information relating to the set up of your Facility, including your Facility's Name, Address, and Bank details. Logos, graphics and signatures for branding and templates can also be added.

A button labeled 'Club's Email Template' is shown next to the 'Email Template' text.

An Email Template can be created or edited via the Club's Email Template button.

Changing the Template will allow a choice between having a Header or Footer, or both. The colour scheme of the background can be picked, and images and text can be added to personalise your Template.

The screenshot shows the 'Common Details' form in the GymMaster application. It contains a grid of dropdown menus for various settings: Language Setting (English (US)), Time Zone (Pacific/Auckland (GMT 12:00)), Date Style (DMY), Weight Format (kg), Height Format (m), and Length Format (mm).

Common Details allows for the setting of Location, Time Zone, Date format and Height, Weight and Length formats. These settings will be used throughout Gymmaster for calculating and displaying resource and scheduling allocations, recording measurements, and displaying and entering dates.

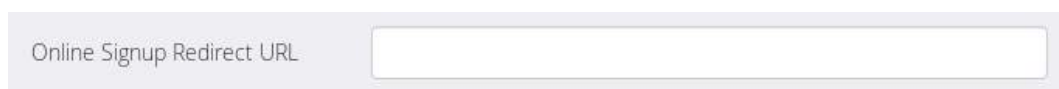




**Additional Details**

Email Address	<input type="text"/>	Till Float	<input type="text" value="\$0.00"/>
Phone Number	<input type="text"/>	Club Opening Date	<input type="text"/>
Website	<input type="text"/>	Club Billing Start Date	<input type="text"/>
Online Signup Redirect URL	<input type="text"/>	Default Door ID	<input type="text"/>
Tax Number	<input type="text"/>		

Additional Details holds your Facility's Email Address, Phone Number, Website address, Tax Number, Till Float, Opening Date and Billing Start Date. The default Door ID is also able to be selected here.



Online Signup Redirect URL

The Online Signup Redirect address is where Members will be taken once they've completed an online sign-up through the Member's portal. This can be set to a personalised 'Thank You' page, or to your Club's Welcome page for example.



**Billing Details**

☐ Manual Billing Only  
Billing will not automatically send

Billing Provider

Stripe Enabled ☒

Stripe Secret Key

Stripe Public Key

[GymMaster Billing Provider Information](#)

Billing Details is where the information provided to you relating to your Billing Provider is entered. You can also select to enable Manual Billing, if you do not want to bill your Members automatically.



**Notification Sounds**

Tag Granted	<input type="text" value="Windows Notify Sound"/>	Play
Tag Denied	<input type="text" value="Windows Error Sound"/>	Play
New Tag	<input type="text" value="Windows Notify Sound"/>	Play

The sound effect for key tag access granted or denied, as well as for a newly created tag, can be selected via the Notification Sounds setting dropdown boxes.

Maintenance Fee

Maintenance Fee Enabled

☒

Maintenance Fee Cost

Maintenance Fee Interval

Maintenance Fee Offset

Maintenance Fee Tax Rate

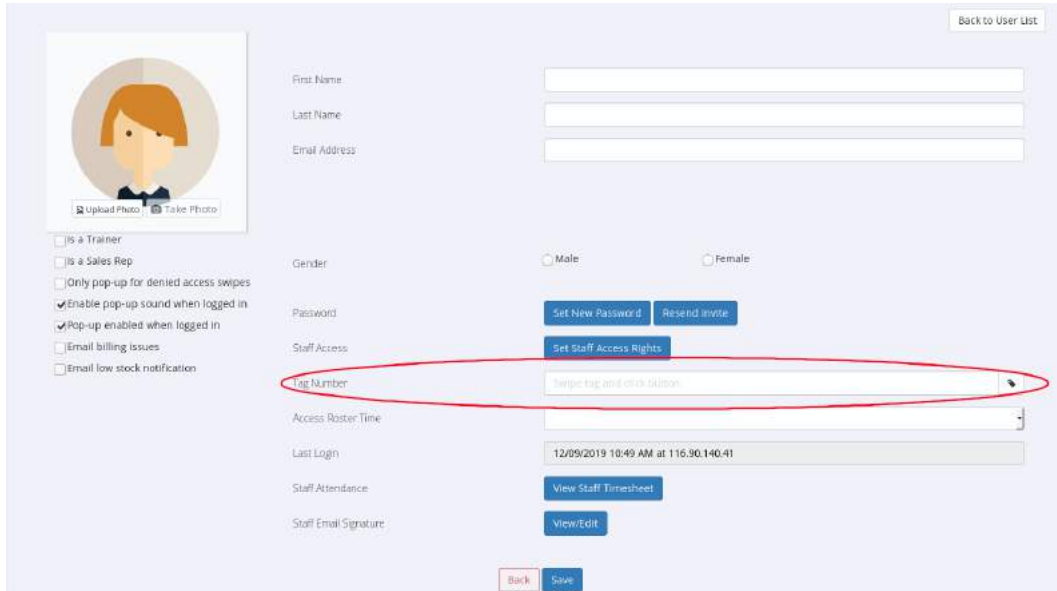
Maintenance Fee Starting Point

A Maintenance Fee is a regular, one off charge on top of standard Membership fees, that can be set to be charged at a regular interval via the Interval setting.

The Fee Offset will create a grace period between sign-up and the first time charging of the fee.

This grace period can be further extended via the Maintenance Fee Starting Point setting, which allows a choice between starting the fee interval at sign-up, or from first payment date.

## Staff Attendance



Back to User List

First Name  
Last Name  
Email Address

Upload Photo Take Photo

☐ Is a Trainer  
☐ Is a Sales Rep  
☐ Only pop-up for denied access swipes  
☒ Enable pop-up sound when logged in  
☒ Pop-up enabled when logged in  
☐ Email billing issues  
☐ Email low stock notification

Gender ☐ Male ☐ Female

Password [Set New Password](#) [Resend Invite](#)

Staff Access [Set Staff Access Rights](#)

Tag Number [Swipe tag and check in/out](#)

Access Roster Time

Last Login 12/09/2019 10:49 AM at 116.90.140.41

Staff Attendance [View Staff Timesheet](#)

Staff Email Signature [View/Edit](#)

[Back](#) [Save](#)

Staff Keytags are assigned via the Settings - User Administration menu.

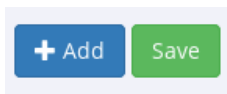
Once the Staff member has been selected, their Keytag can be swiped, and once confirmed by a pop-up, the tag icon (circled), can be clicked to assign that tag (and resulting system generated Tag number) to the Staff Member.

With the Keytag assigned, the Staff Member is able to **Swipe Once** to check in, and **Swipe Twice** to check out of the Facility.

Rosters are how Facility, Staff, Resource and Door access, as well as Staff Schedules are managed, and they can be added via Settings - Roster and Open Hours.

When first adding Rosters, Open and Off-Peak Rosters will be pre-loaded, and are able to be adjusted to your Facility's preferred schedule or operating hours.

A Staff Roster will also be added for any Staff Member that is selected as "Is a Trainer" in the tick-box under their profile picture via Settings - User Administration, which can then be modified to suit.

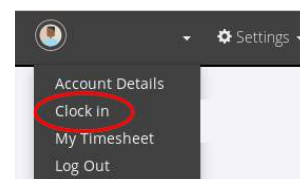


Once your Facility's operating hours are set up, availability or access for each Door, Resource or Staff Member can be added and managed as per the Rosters assigned to each

A Door Roster will set the hours the door may be accessed, whereas the Resource Roster will set the hours of availability that the Resource can be Booked.

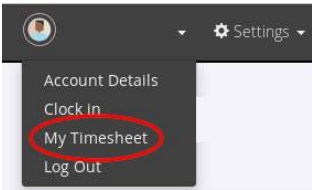
Setting specific Rosters for Staff will make them available for Bookings in the [Schedule](#), and these available hours can then be modified or managed via [Unavailable Time](#).

Staff attendance within their rostered access times is recorded on their Timesheet, and based on when they Clock In or Clock Out via their Account menu dropdown.



Staff	When	Time Worked	Appointments	Classes Taken	Members Signed Up	Available/Restored Time
	2 Sep 2019	07:00:00	0	0	0	
	3 Sep 2019	07:30:00	0	0	0	
	4 Sep 2019	06:00:00	0	0	0	
	5 Sep 2019	07:00:00	0	0	0	
	6 Sep 2019	08:00:00	0	0	0	
Totals		35:30:00	0	0	0	

The Timesheet is available from the View Staff Timesheet button, once the Staff Member is selected from Settings - User Administration, or alternatively by the Staff Member themselves, via their Account menu dropdown.

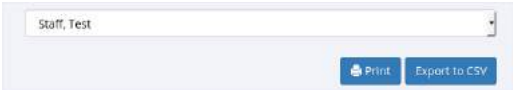


Staff	When	Time Worked	Appointments	Classes Taken	Members Signed Up	Available/Restored Time
Hinton, Al	1 Sep 2019	06:30:00	0	0	0	
	2 Sep 2019	07:00:00	0	0	0	
	3 Sep 2019	07:30:00	0	0	0	

The Timesheet will display the staff member's days and hours worked, and any absences can be recorded there, as well as any manual adjustments that need to be made for early, late or missed key-tag swipes. Appointment, Classes, and Members Signed Up will also be displayed for each Staff Member on the Timesheet, providing a summarised overview of staff activity.

Staff	When	Time Worked	Appointments	Classes Taken	Members Signed Up	Available/Restored Time
	2 Sep 2019	07:00:00	0	0	0	
	3 Sep 2019	07:30:00	0	0	0	
	4 Sep 2019	06:00:00	0	0	0	
	5 Sep 2019	07:00:00	0	0	0	
	6 Sep 2019	08:00:00	0	0	0	
Totals		35:30:00	0	0	0	

The resulting information can then be printed or exported to a file, and used to assist in calculating and managing payroll.



The screenshot displays three panels for configuring a membership:

- Membership Details:** Includes a sub-header "You can configure membership templates that you sell to members and the price they pay for their membership." and a "Name" field with a dropdown menu currently showing "12 Month Pk Membership".
- How Member Pays:** Includes a sub-header "How the member will pay us and how regularly they will pay." and a radio button selection for "In Person Payments" with a note: "The member will initiate the payments in person, or through your website."
- Membership Length:** Includes a sub-header "How long the membership will last for, and how will it end?" and a "Programme Basis" dropdown menu currently showing "Select...".

## Membership Settings

Available Memberships can be managed and maintained via Settings - Membership Types.

From here, Current or Discontinued Memberships can be viewed or edited, and new Memberships can be added.

When adding a Membership, the information required is separated into 3 sections, Membership Details, Payment and Membership Length.

Memberships within a Facility can be grouped into Divisions. This allows for similar Memberships eg - 3, 6 or 12 Month Memberships, Weights and Workout, or Tanning and Beauty for example, to be reported on and managed together.

This section shows four configuration options:

- Terms and Conditions:** A dropdown menu set to "Not Required" with edit and add icons.
- Waiver:** A dropdown menu set to "Not Required" with edit and add icons.
- Cancellation Terms:** A dropdown menu set to "Not Required" with edit and add icons.
- Age Requirement:** Two input fields labeled "Min Age" and "Max Age".

Membership Details allows for configuration of Memberships, including whether they are available online via the Portal, whether the Membership is renewable, and if the Membership is able to be Shared.

Waivers, Cancellation Terms and general Terms and Conditions for the Membership can be attached or created, and any applicable Age restrictions can be added also.

Payment method and frequency settings allow for In Person Payments, where the Member will initiate payments in person, or alternatively, Integrated Billing - where the Member's account or credit card is billed directly via the Gymmaster system.

Payment Frequency allows for the setting of the regularity of payment, from a 1-off paid in full payment, through to an Annual subscription.

A Sign-up and/or Online Cancellation Fee can also be added if required.

Membership Length provides settings for how long the Membership will last, and how it will be concluded. This can include open-ended contracts, renewal based contracts, or charge per visit type Memberships.

A Discontinued Membership will not be available to be sold to future Members, but will still allow access to current Members on that Membership.

## Members

GymMaster makes a distinction between Members and Memberships. A Member can for example have multiple Memberships, eg a Tanning membership that is managed separately from a Weights Membership, depending on how your facility is set up, or you might have memberships with different benefit levels, for example an All Access membership vs a 10 Visit Swim Pass.

Your client could also have memberships in different stages, eg one membership could be Active while another is on Hold.

The Member Details tab is where you add new members to your club or business, add photos to their file, purchase or assign key tags, add Email and SMS contact function, document emergency contacts, and add any other notes that might apply to the member.

The screenshot shows the GymMaster web interface for editing a member's details. The header includes the GymMaster logo, the member ID #1012513, a search bar, and user profile information. A left sidebar contains navigation links: Home, Add Member, Find Member, Visitors, Schedule, Point of Sale, Report & TB, Task, Stock, Membership List, and Member Portal. The main content area is titled 'Details' and features a toggle switch to switch between 'Member' (selected) and 'Prospect' modes. Below this, there are two sections: 'Details' and 'Contact'. The 'Details' section includes fields for Organization, First Name, Last Name, Gender (Male/Female), Tag Number, and a Note field. The 'Contact' section includes fields for Email, Secondary Email, Cell, Home, Work, Address Search, Address, and Suburb. A 'Save' button is located in the top right corner of the form area.

You can also choose to designate a new contact as a Prospect, allowing you to identify and manage potential new members.

## Member Overview Panel

Check In Visit History

Make Booking Make Purchase

**Account**  
Member Owes Us : \$0.00  
Next Billed: Unable to bill - No billing provider selected

**Staff**  
Gym Membership  
\$0.00 Full Cost  
Current  
25 Mar 2019 -  
Visits: 1

Linked Members Add

The left hand side of each Member's individual screen, details an account overview for that member.

From here you can add or upload a photo, manually check a member in, view Visit history, make a booking for a Member, and process a purchase of goods and services.

You will also find a summary of the Member's account status, current Memberships and any Linked or Shared Member accounts. These summary sections also provide a shortcut to the relevant Member's details and actions tabs.

A Linked Account allows charges and benefits for the Linked account to be billed to a Master Account. This could be useful for example, in cases where a couple may want to simplify their billing to a single account.

Details of any Linked Accounts are displayed in a panel at the bottom left of the Membership screen, and include the Linked Member's name, their relationship to the Master Account holder, and what charges are being billed to the Master Account.

**Linked Members** View

**Pay For:**

Son  
Luke Skymember (0) ×  
Paying for Booking Charges And POS Charges And Membership Charges  
**Owing: \$9.99**

Tillie Lee (46) ×  
Paying for Booking Charges And Membership Charges  
**Owing: \$0.00**

**Linked Members**

**Master Account**  
Anakin Skymember  
28 day promo  
#5014

**Linked Account(s)**

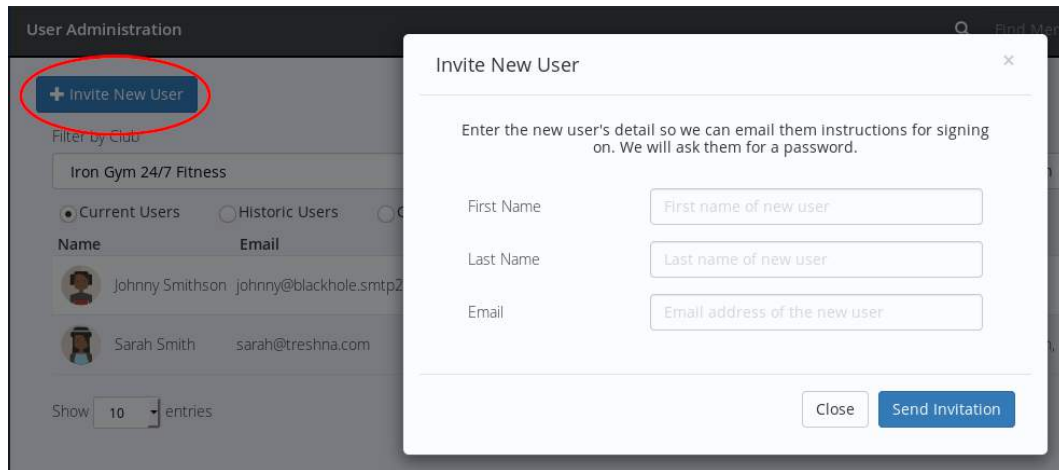
Luke Skymember  
Gold Fortnightly Gym Member  
Son  
Paying for Booking ×

Tillie Lee  
Gold Monthly Member  
Paying for Booking Charges And Membership Charges ×

Find Member  
Add New Member



## Add Staff Members



A new Staff Member is added through the Settings - User Administration menu, via an invitation sent to their staff email account.

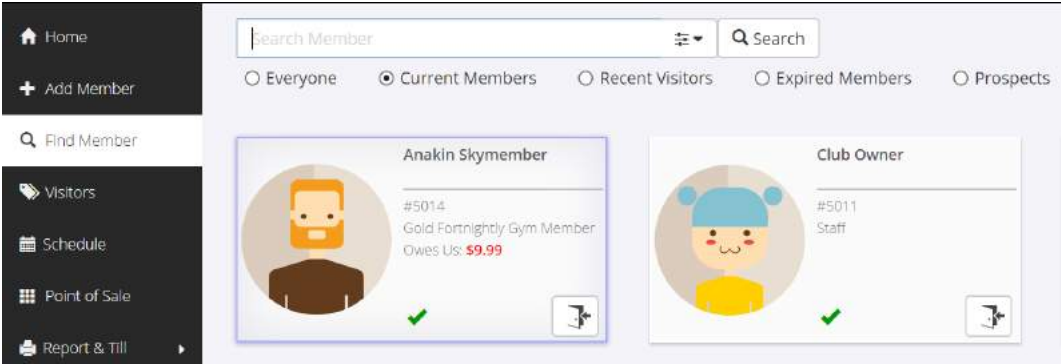
Once invited and accepted, the staff member will have a User Profile that can be designated as a Trainer or a Sales Rep, and can have Staff Access Rights set as outlined in the [Dashboard](#) section.

If the Member is set as a Trainer, they will then be available as a Resource for Bookings and Schedules etc.

# Find a Member

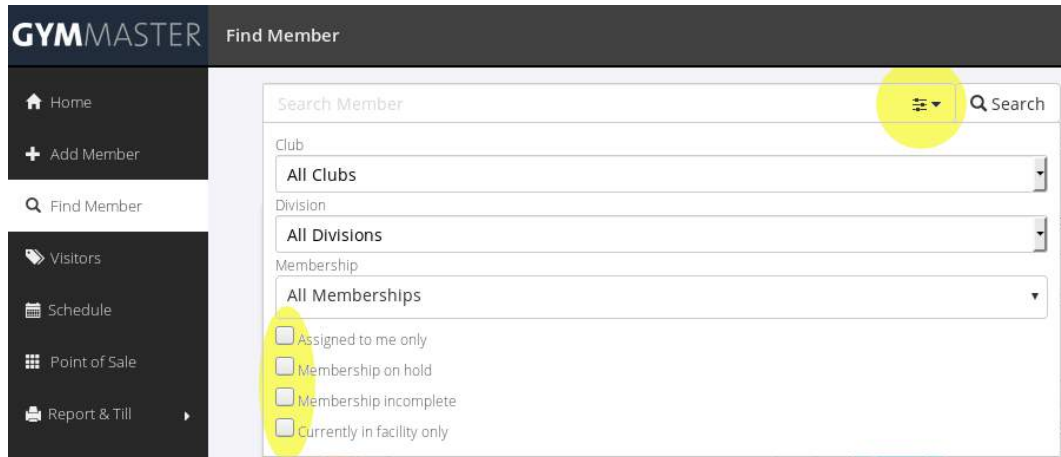
This section allows you to search within all Members by selecting Everyone, or restrict your search to Current Members, Expired Members (which also includes Cancelled Members), Recent Visitors, and Prospects.

Searches can be by First Name, Surname, Email Address, Phone Number, Membership Number, or any of the other Custom Fields on the Member's Detail page.

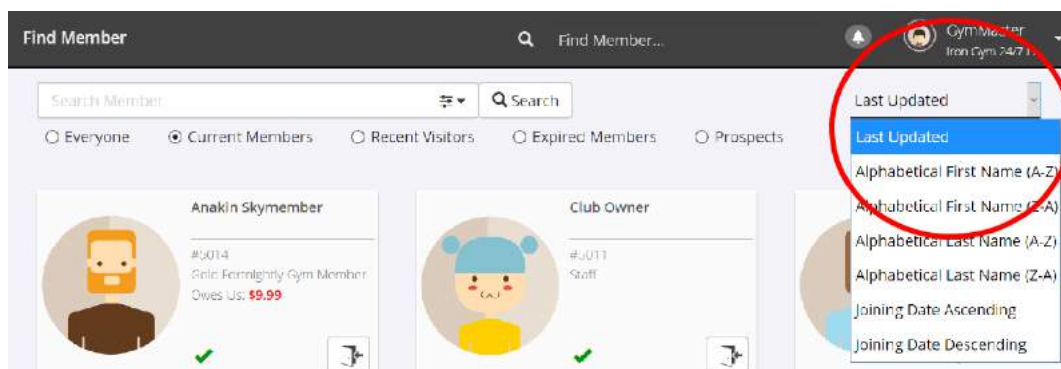


## Member Search Filters

For all of the above search filters, you can further sort members alphabetically by first or last name, their join date or by most recently updated, by using the drop down filter menu at the top right by the Search button.



In the main Search box, filters are available at a Club, Division and Membership Type level. You can further refine your search via the tick boxes, to Members assigned to Staff, Memberships on Hold, Incomplete Memberships, and by Members currently on premise in your facility.



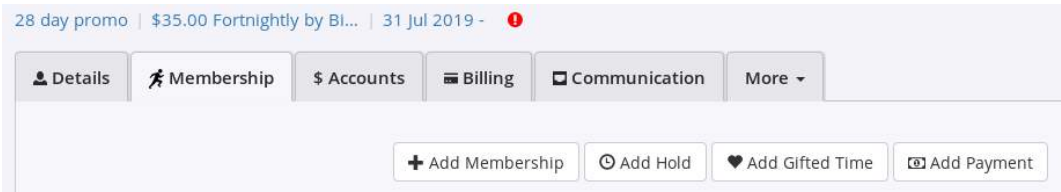
## Member Details



Once the Member has been added or located, they will have their own Member Details page where you can access their address, contact numbers, emergency contacts and any custom fields or lookups that have been added, as well as their Membership details, Account history, Billing details, and Communication history, found in the 5 tabs at the top of the page.

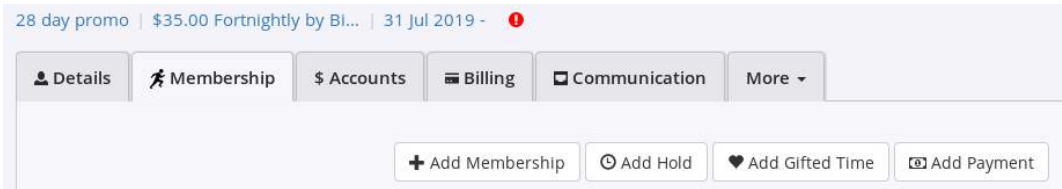
You can also see Appointment Bookings, Measurements and Progress, PT Programs, Training Schedules and Member Questionnaires, from the “More” tab

# Memberships

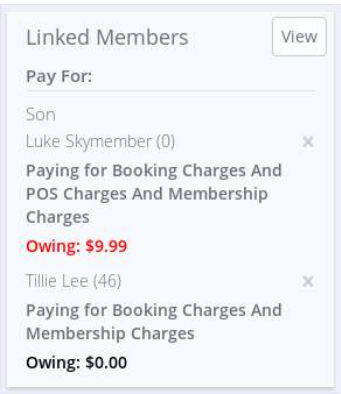


The Membership tab will take you to a summary of your client’s Current Memberships and Member Benefits, and shortcuts to Add a Membership, Add a Hold, Add Gifted Time and Add a Payment.

# Shared & Linked Memberships



Linked Memberships allow for a Member to pay for another Member's benefits. This might be useful for a family group, where a parent pays for their child's membership for example, or for a couple, where one partner pays for both Memberships.

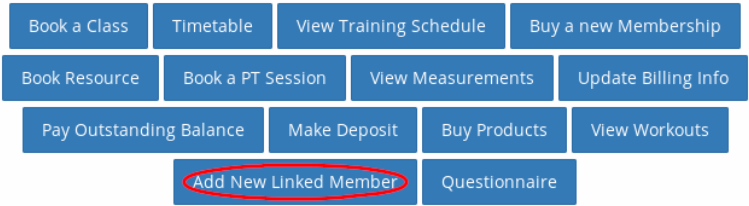
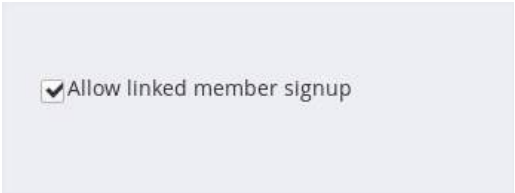


Details of linked Memberships can be found at the bottom left of the Member panel. The View button will display all Linked Members, and give the option to add further Linked Members

Where a Member does not have any linked Memberships, an Add button will be displayed.

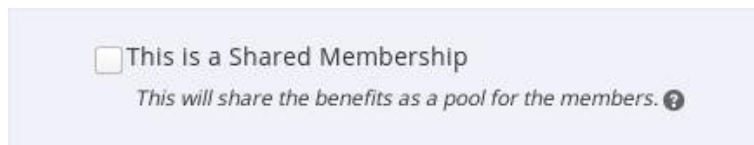
From here an existing Member can be added to the Primary account, or a new Member can be added to your facility and attached as the linked account.

When enabled through Settings - Member Portal, current Members can link new Members to their Membership via the Online Portal, enabling a Parent account to add multiple linked accounts.



Shared Memberships allows for two Members to share a Membership equally, where all benefits of the primary Membership are accessible to the secondary Membership. In practise, this means that if the primary Membership has a 10 Pass concession benefit for example, then it can be used equally, or solely by either party for 10 visits total.

The process to create a Shared Membership is the same as a creating a standard Membership type, with the Benefits and costs added in as per usual, with the addition of the Shared Membership tickbox selected.



The maximum number of secondary Members on a Shared Membership defaults to one, but can be adjusted if required. An additional cost per secondary Member can be added at this stage also.

When naming a Shared Membership, choose a name that allows it to be easily recognised and selected from the Membership list, and that differentiates it from standard (non-shared) Memberships.



Where a current Membership is to be shared, the easiest method is to duplicate the current Membership, then designate it as Shared and rename it accordingly.

When adding Benefits to a new plan (Shared or otherwise), the All Classes and All Doors Benefits will be added by default, to allow Members to book sessions, and to enable access to the facility.

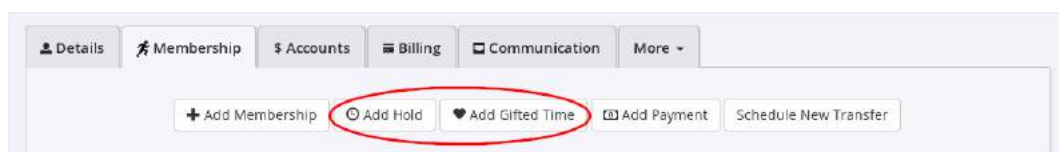
Other Benefits can be added manually, or they can be copied from another Membership.

## Gifted Times and Holds

While Gifted Time and Holds can both act as a temporary suspensions on billing, the purpose of Gifted Time is to allow for unbilled Benefits during the period of Gifted time, whereas a Hold removes access to Benefits for the duration of the Hold.

In both cases, the duration of the Gifted time or Hold will extend the roll over date of the current Membership.

When viewing any Suspension, (Gifted Time or Hold), in the Member's Account detail, the Suspension will show as a credit to the Member's account, balancing the debit for the period in question.

A screenshot of the 'Hold Membership' form. The form has a title 'Hold Membership' and a close button. It contains several fields: 'Membership' (a dropdown menu showing 'All Active Memberships'), 'Reason' (a text input field), 'Next Payment Date' (a date field showing 'Sat 14th Sep 19 (\$34.00)'), 'Start Dates (Inclusive)' (a date field showing '13-09-2019'), 'End Dates (Inclusive)' (a date field showing '13-09-2019'), and 'Duration to hold:' (a dropdown menu showing 'Select'). Below these fields, there are four radio buttons: 'Free' (selected), 'Setup Cost', 'Ongoing Fee', and 'Continue Regular Billing'. At the bottom, there are two checkboxes: 'End Hold on Member Return' (checked) and 'Prorata Membership Fees' (checked). At the very bottom, there are 'Cancel' and 'Next' buttons.

When adding a Hold, you can choose the start and end dates or the duration, whether to charge a one-off set-up fee, and whether to continue regular billing during the Hold period.

As charges may still be accrued during a Hold, eg POS sales or other scheduled fees relating to memberships that have not been excluded, these can be flagged to not be Billed during the Hold period, in the Hold Settings screen. In this case, they will carry-over to the next billing date after the Hold ends.

A Hold can be placed on one, some or all Memberships in cases where a Member has more than one - eg a Hold on both a Weights and a Tanning membership.

You can also choose whether to Prorate fees during the Hold period. If ticked this will mean the member will only be charged for the part of the billing period that their membership is still active. If unticked the member will be charged for the full period in which the Hold started, with only subsequent periods being held, for the duration of the hold.

If the option, End Hold on Member Return is selected, the Hold can be set to finish once a member next swipes in. This can be useful in cases of leave due to injury for example, where the length of the leave period may be at the Member's discretion.

From the Hold Settings cog, a Hold can also be set to prevent a Member from booking new classes during the hold period, have any current bookings during the Hold period automatically cancelled, and any related Benefit generation can be paused as well.



If required, an annual limit can be set for the quantity (Count), and length of Holds that a customer can have in a year, with a "Year" beginning on the member's joining date. The length can be designated in either Days, Weeks or Months, and the Count can be any number you choose. Whichever limit is reached first, (eg 3 Holds in year, or 30 days total in a year), will result in the system preventing a further Hold being placed

Holds added by Admin accounts do not count towards the Hold Count or Hold Length.

Adding Gifted Time allows you to provide a Member a period of un-billed time to one or all of their Memberships, entered either as inclusive start/finish dates, or from the pre-populated duration drop down.

An example of when Gifted Time might be used could be to reward a customer for a referral by giving them a week free on their current membership, or to give free access to a Member for a new Membership promotion - eg 2 week's Gifted Time which then converts into a current membership at the end of the gifted period.

Note - In the 2nd example, the Member will be counted as a current Member throughout the period of Gifted Time.

## Membership and Member Tag Actions



Each membership page also has common "Membership and Member Tag" actions that can be found via short-cut links at the bottom of the page.

From here you can do a Manual Check In, view Visit History, Create a Task to stop a Member at the gate on their next visit, or Issue Additional Tags.

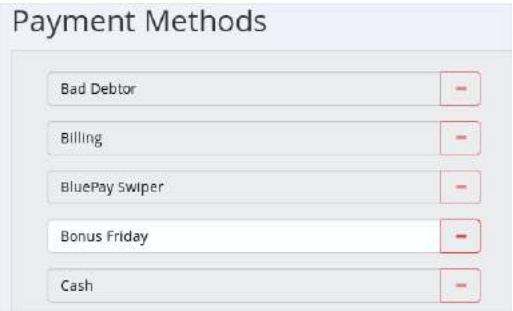
At Member level, you will find further links to the following common tasks including -

- \* Add a Photo
- \* View Historic Addresses
- \* Update a Password
- \* View Linked Members
- \* View a Member's Activity Log
- \* Merge with Another Member
- \* Add a Signature
- \* View Agreement Status
- \* Login as a Member
- \* View a Member's Billing Report
- \* Delete a Member
- \* Zero or Write-Off an Account

# Financial Configuration

Payment Methods allow for labelling or tagging of transactions to identify them for accounting or book keeping purposes.

There are a number of preset Payment Methods that cannot be edited or updated, however it is possible to add a User Added Method, which will be displayed with a white background.



User added Methods are a description or tag of how the transaction was processed, and do not affect the financial or billing aspect of the transaction itself.

An example of this might be writing a transaction off as a "Bad Debtor" when zero-ing a transaction, or alternatively, identifying a credit card transaction as "Visa" for example, to help identify the transaction when reporting.

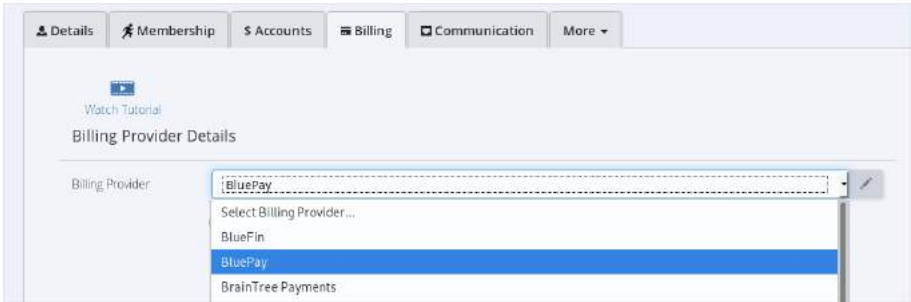
Billing Providers are listed in the Financial Configuration settings. All providers listed have an agreement in place to process billing runs created by GymMaster

While Gymmaster provides the information and facilitates the process of billing, Billing Providers are responsible for processing all payments between your Member's and your Facility.

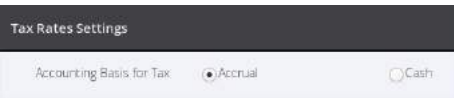
When setting up with a Billing Provider, you will generally have a choice of options. As your agreement will be with the provider directly, it is important that you evaluate their service, costs and fees to ensure you are satisfied with the benefits offered.



Once enabled, you will be able to select a Billing Provider from the Billing tab of each Member.



Tax Rates settings are located in Settings - Financial Configuration.



Tax Rates Settings

Accounting Basis for Tax: ☒ Accrual ☐ Cash

The first setting gives a choice between 'Accrual' and 'Cash' options for tax.

The difference between the 2 settings is in how your financial KPIs are reported, with 'Cash' reporting on payments as they are received, and 'Accrual' reporting on when Sales are actually made.

Multiple Tax Rates can be Added where required, for example where rates differ between products and services.

Any single tax rate can also be designated as the Default tax rate, that will then be used for Divisions, Products Types and Classes.



Title	Rate (must be between 0 and 100)	Compound?	Action
taxrate1_5%	5.000 %	<input type="checkbox"/>	
taxrate2_5%	5.000 %	<input type="checkbox"/>	

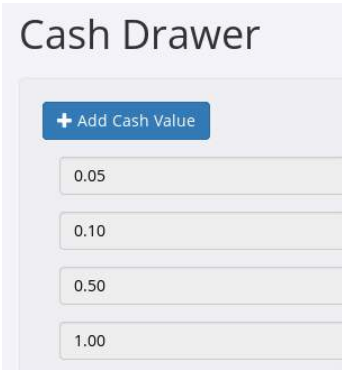
+ Add Tax Rate Component

A Tax Rate can also be built up from multiple component rates, where individual rates can be Added or Compounded to create an overall rate. These will be combined to a single tax line on the invoice

Cash Drawer settings provide the currency denominations that will be available for register and till management.

Each currency value that is required needs to be added, making them available for processing the Cash Count as part of Day (X) and End of Shift (Z) Reporting

A Cash Count may not need to be performed for all shifts or reports, and can be toggled on or off, as part of the X Report process



Cash Drawer

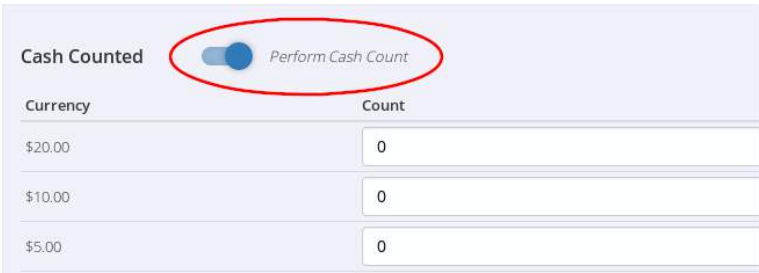
+ Add Cash Value

0.05

0.10

0.50

1.00



Cash Counted ☒ Perform Cash Count

Currency	Count
\$20.00	0
\$10.00	0
\$5.00	0

Table of Contents

## Accounting Lock Period

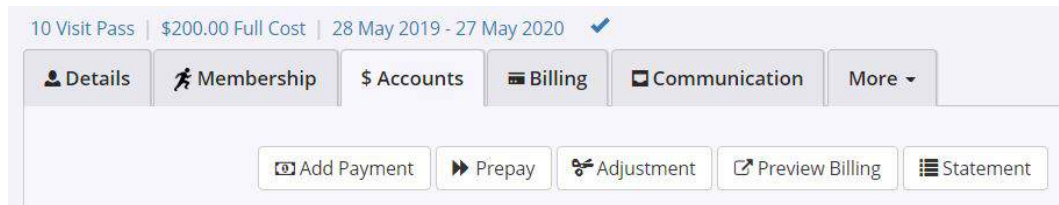
Accounting locks cannot be undone, please use with caution.

No Previous Accounting Periods

If an Accounting Lock Period is selected, all accounting records prior to the date selected will be locked. This can be useful for accounting purposes to ensure that records already submitted are not then updated or modified in any way.

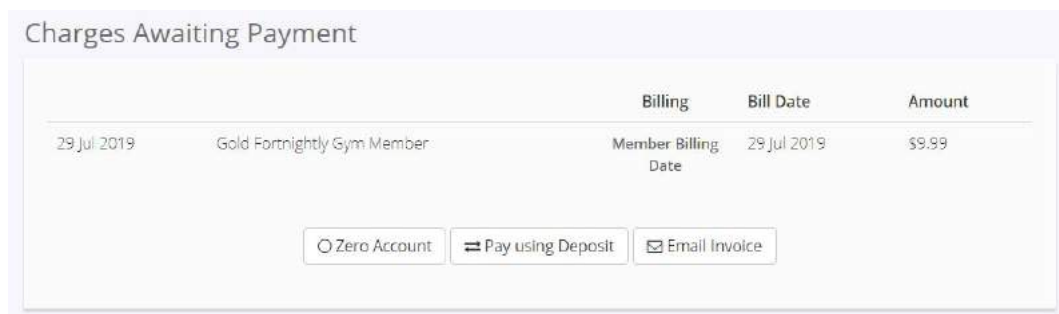
As locked records cannot be modified, voided or adjusted however, it is recommended that checks are in place to ensure that all records are complete and correct prior to locking.

## Accounts

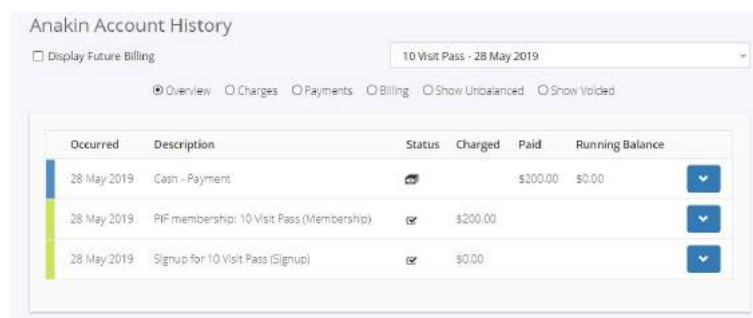


The Accounts tab allows you to Add a Payment, Prepay a Membership, and make an Adjustment to an account, either by reversing/refunding a payment, or reversing a sale. (Note this will apply a credit or debit to the member's account, but will not refund money to their bank account.) You can also Preview Future Billing which will show amounts and dates of scheduled billing, and view, print and email a member's Account Statement.

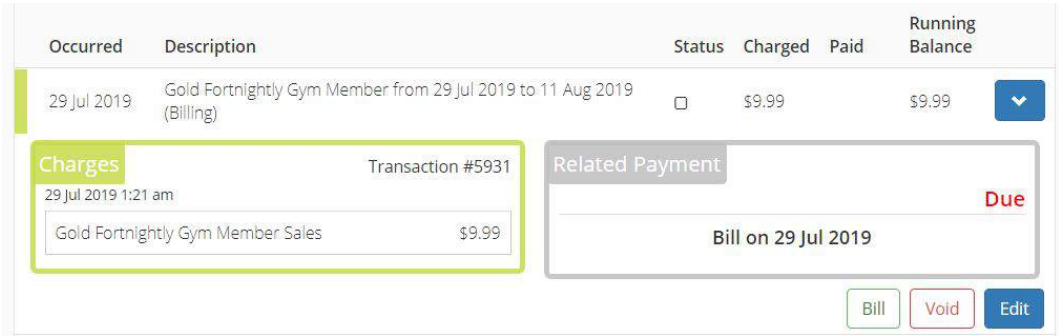
Outstanding charges awaiting payment are displayed on the top section of the Accounts screen, with options to zero the charges, process a payment by matching a deposit, or email an invoice to the member for the outstanding amount.



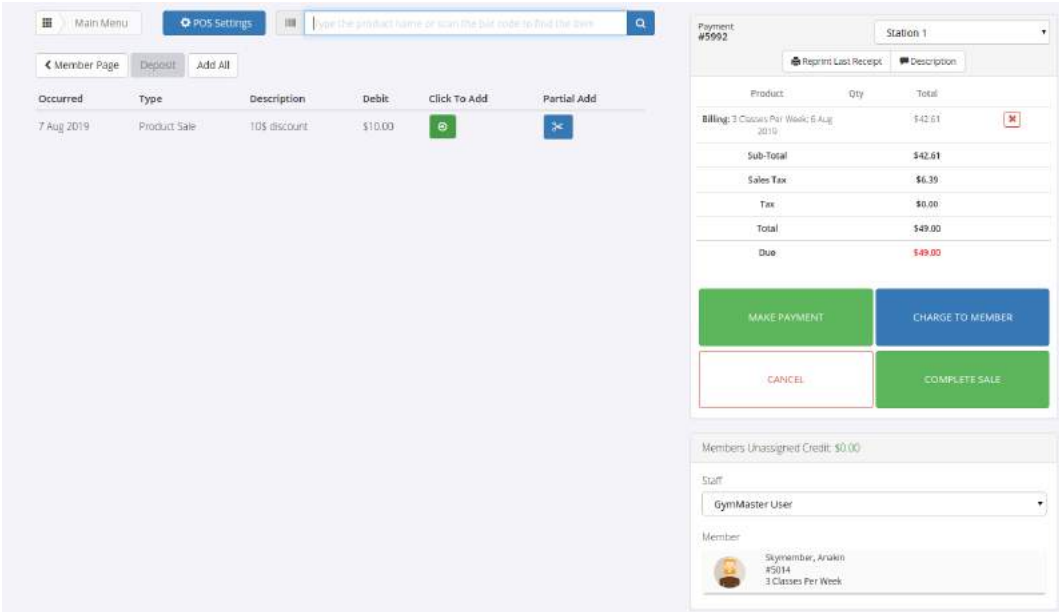
A full schedule of a Member's Account History is displayed on the lower half of the page, which can be sorted by Membership and then by an Account Overview, Charges Pending and Paid, Payments made, completed Billing, and Unbalanced and Voided Transactions. All available transactions can also be filtered by Membership type, and you can choose to include or exclude future billing via the tickbox below the Member's name details



When reviewing the Overview screen, all Charges have a green vertical indicator, with Payments showing as Blue. Hovering over either a Charge or a Payment will show the related transaction highlighted in Grey where applicable, allowing for easy visual matching of charges and payments.



Expanding the blue drop-down button reveals options to Bill unpaid Charges, or Void or Edit current charges. Selecting Bill, will take you to the POS screen to process the selected charge, whereas Edit will give you the option to change the due date or amount of the Bill, as well as any notes on the invoice.





## Billing

The screenshot shows the 'Billing' tab selected in a navigation bar. At the top, there is a status bar with '10 Visit Pass', '\$200.00 Full Cost', and a date range '28 May 2019 - 27 May 2020' with a checkmark. Below the navigation bar, a message states: 'Select your registered billing provider to enter the member's billing details (credit card or bank account). Once completed the member will be deducted automatically.' The main section is titled 'Billing Provider Details'. It features a dropdown menu for 'Billing Provider' currently set to 'CC File Export - 3rd Party Billing Company'. Below this are three radio button options: 'Bill Member Automatically' (which is selected), 'Don't Bill Automatically', and 'Never Bill'.

The Billing tab is where you can select your registered billing provider and enter the Member's billing details, (eg credit card or bank account).

Once completed the Member will be deducted automatically, or you can choose to not bill automatically, or never bill, as per your agreement with the Member.

Once a Provider has been selected and Client Billing Details have been entered, you can choose whether the specific Member will be included or exempted from a Maintenance Fee, if this option has first been set up and enabled at both Club level in Settings - Club Detail, and at a Division level in Membership Types - View Division List

The screenshot shows a form titled 'Maintenance Fee'. It contains a checkbox labeled 'Charge Maintenance Fee'. Below this are two input fields: 'Next Charge Date' and 'Maintenance Fee Cost'.

Other Information allows for management of Members who may not be meeting their billing obligations, or who may require assistance to manage their Memberships.



The 'Other Information' form contains the following fields and options:

- Max amount to Bill:** A text input field with a placeholder that reads 'Optional, leave blank for default billing.'
- Deadline for Owing:** A text input field.
- Billing Comments:** A text input field.
- Bad Debtor:** A checkbox that is currently checked.
- Blacklisted:** An unchecked checkbox.

The Max Amount To Bill field allows a maximum billing value to be set regardless of what the member owes or has falling due. This can be useful if a member needs to settle an outstanding or overdue amount, but cannot cover the total amount in one transaction.

An example of this might be a Member that was \$150 in arrears could make an arrangement to be charged a maximum of \$50 a month for the next three months, rather than the full \$150 on their next bill. By setting this Max Amount to Bill, the Member will be charged three amounts of \$50 for the next three Billing runs, excluding any other charges that accrue in this period.

Deadline for Owing, allows a one-off revised deadline to be set before a Member's debt falls due, and can be used in conjunction with Max Amount to Bill to create a payment schedule to resolve their arrears.

Working with the above example, the Deadline for Owing would be entered in three months ahead, to allow sufficient time for the Member's agreement to pay. Once the revised deadline is passed, the standard settings for a Member with arrears will then apply again, such as preventing entry or similar, as set out in Advanced Config - Door Reader.



The 'Door Readers' form contains the following fields:

- Stop After Owe:** A text input field with the value '5' and a dropdown menu set to 'days'.
- Stop Member When Owes:** A text input field with the value '200'.
- Warning On Owe:** A text input field with the value '100'.

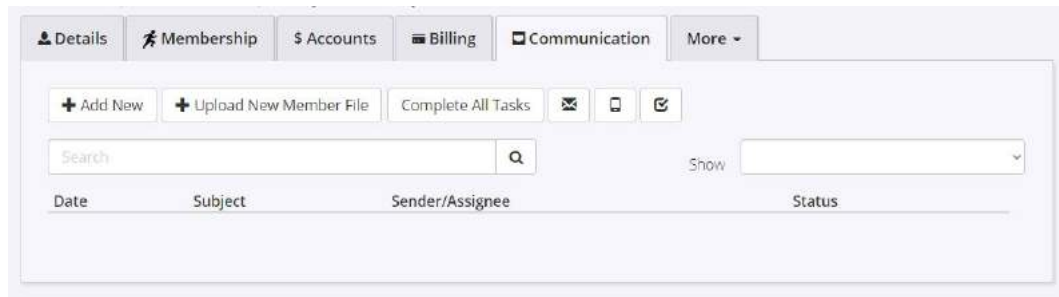
Billing Comments allow for internal notes to be made on a Members account. An example might be notes detailing an agreement made, or other information regarding a Member's current Billing status. Notes can also be reported on as additional information per Member.



The warning message displayed is: **Member #700472157 is flagged as a bad debtor. Account is currently overdue.**

Marking a Member as a Bad Debtor will display a warning message on the Member's account advising the Account is overdue.

## Communication



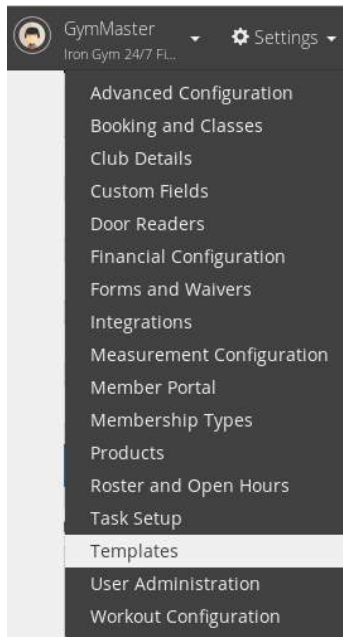
The Communications tab is the place to view a Member's communication history. This detail can be filtered by type via the drop-down menu, or you can search within the Subject or Sender/Assignee fields.

You can also add a Note, Task or Call Log to a Member's account, add a file to the Member's communication history, send an Email or SMS to a Member, and view their agreements on file.

Email communication can be viewed, printed or deleted from the list of all communications.

The More tab is where you can access the member's Appointment Bookings, Measurements and Progress, Personal Training Programs, Training Schedules and Member Questionnaires

## Templates

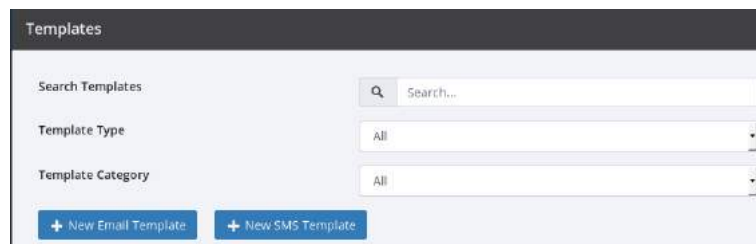


The Settings - Templates menu is where a selection of pre-populated email and SMS templates are located, allowing for fast and targeted communication with your Members.

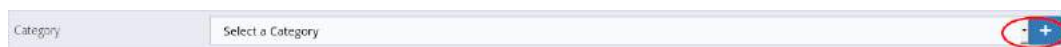
From regular newsletters, to Booking confirmations, through to reminders of outstanding balances, Templates can be selected, or created and saved, to streamline and standardise your communication.

By choosing pre-set fields from your customer database, the templates can include member specific detail, without having to write a tailored email or SMS every time.

First Name, Last Name, Address, Last Visit Date, Amount Owing or any Custom fields etc, can all be added as standard fields that will be populated with the relevant details once a Template is selected for a certain Member.



Templates can be Categorised to allow for easier sorting, with new Categories able to be added when a new Template is created, by selecting the Plus symbol and adding the new Category detail. The new Category will then be available for sorting or selection, once the template is saved.



Examples of Categories might include

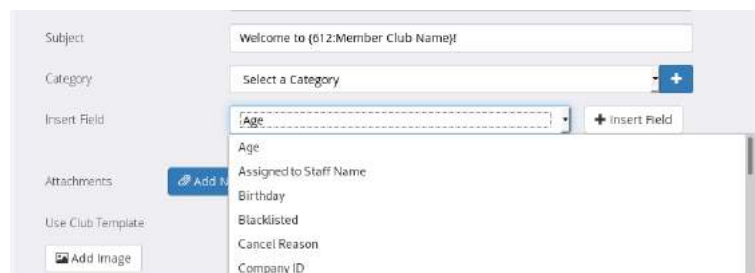
- \* Staff - allowing each staff member to have their own collection of Templates
- \* Accounts - grouping all account related communication together
- \* Task - booking confirmations, welcoming new Members etc

Used well, Templates and Categories can be a powerful tool to enable you to standardise your communication and develop a consistent voice across your business, when communicating with your Members.

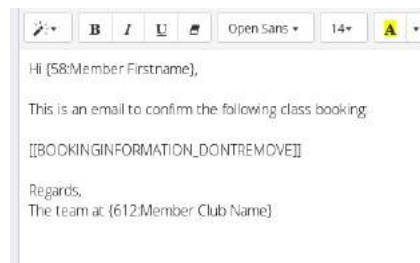
## Template Fields

Template Fields allows you to add information or details from your Gymmaster system, directly into your communication with your customers, by inserting any information that needs to change depending on the Member that is being contacted, with information selected from the system.

The available fields include any of the information from a Member's profile, such as Date of Birth, First and Last Name, Age, City - as well as system generated information, such as Start Date, Last Visit Date, Concessions Remaining etc.



An example of this could be inserting a Member's first name in a standard Booking Confirmation email. As the majority of the content of the email doesn't need to change, it can be saved as a Template, with just the Member specific detail being inserted by a Field. This means the Template will always be personalised to a Member, while still allowing it to be saved and re-used for any other Member as well.



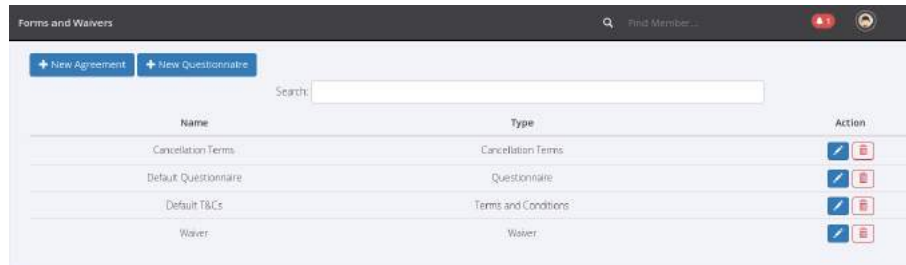
Once selected and inserted into the Template, the Field will default to having brackets around it along with a system reference number.

These will be automatically added once the Field is selected from the Insert Field dropdown menu.

Fields can be used in Subject lines also, allowing for personalised Email subjects, depending on the content required. An example is a welcome email template, where the Member name can be inserted into the template subject line by using a Field.

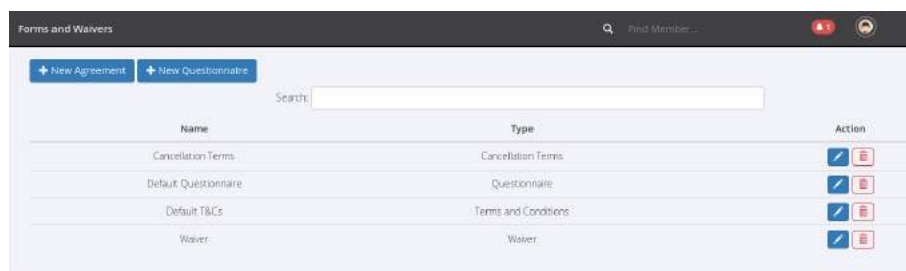
Email Template Name	Online signup: Welcome, new member!
From	Sender Email
CC	CC email
BCC	BCC email
Subject	Welcome {58:Member Firstname}!

## Forms and Waivers



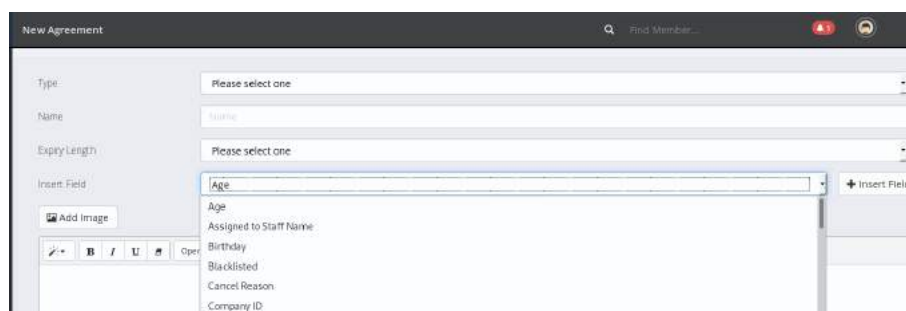
The Forms and Waivers section is where you will find standard Terms and Conditions, Waivers and Questionnaires to suit your facility and client base. Custom Forms and Waivers can also be created.

When creating a new Questionnaire, there are options for Text, Checkboxes, Dropdowns, Headings, Dates or Notes, to allow a custom form to be created.



Selecting 'New Agreement', results in a choice of T&Cs, Waivers, or Cancellation templates, with the ability to compose your own document in the text editor window.

The option to insert standard fields into the template, allows for documents to be created that can be used in common situations, by inserting information from the Member's profile from both standard fields and as added via Settings - Custom Fields.



The most common usage for Waivers and Agreements is during the sign-up process, as part of the contractual agreement with your clients, however Questionnaires can also be used to understand a Member's goal for example to help tailor Workout or Program, or as a tool to gather information about your client base.

October 4, 2019

[Table of Contents](#)

## Visitors

A "Visit Filter" menu with a light purple header. It contains several filter options: "Club" with a dropdown menu showing "Iron Gym 24/7 Fitness"; "Door" with a dropdown menu showing "All Doors"; "Start date and time" with a text input field showing "24-07-2019 12:00 AM"; and "End date and time" with a text input field showing "24-07-2019 11:59 PM". Below these are two radio buttons: "Tailgaters" (selected) and "Interclub Visitors". At the bottom, there are three buttons: "Auto Refresh" (with a refresh icon), "Print" (with a printer icon), and "Clear Filter". At the very bottom, there are three buttons: "Reception" (highlighted in blue), "Edit" (in blue), and "Open" (in green).

The Visitors menu is where you can see all visits by a Member to your facility. These will include Members swiping in with tags, or any manual check-ins by staff. You can also view where 2 people enter on one Member's tag, where the Tailgating function is set up, as well as any Interclub visitors, where an arrangement has been made with another club to share Members/Memberships.

Visits can be filtered by Membership and Door, as well as Date and Time and a printed report of Member visits is available from the Print button.

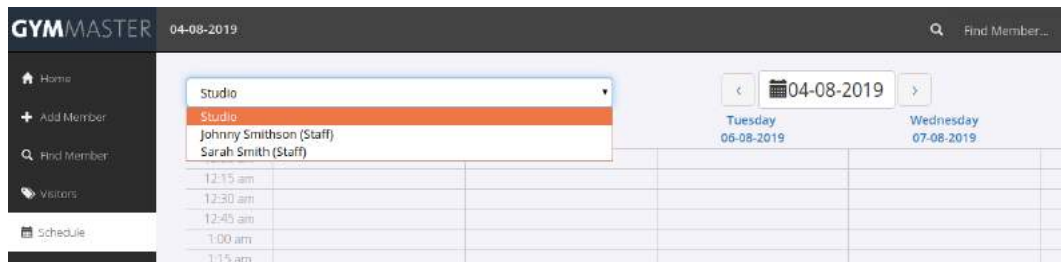
Staff can control the Door Lock Status and manually open the applicable door from the Edit and Open buttons at the bottom of the Visit Filter menu



## Bookings and Schedules

The Schedule menu is where you can add and manage Bookings, Meetings, Classes and block out Available and Unavailable times. In order to use Schedules, you will first need to have Services, Classes and Resources set up, via Settings - Bookings and Classes

In the Schedule view, you can toggle between Weekly and Daily views, and switch between your Facilities and Resource calendars.



A Booking is any time set aside in the Schedule for a Resource. By first selecting the Resource, then the time, the Resource can then be added to a Booking, Meeting or to a Class where appropriate.

Available or Unavailable time is used to manage Resources on the Member Portal. Available time will flag that time period as being able to be booked through the Member Portal, with Unavailable time marking the chosen period as non-bookable. Unavailable time could be used for a Resource, when a staff member wanted to block out time for maintenance or cleaning of a Studio for example, or if a new staff member wanted to set non-bookable time to allow for back office work, or client interaction.

A Meeting can be set for any Resource, by first selecting the Resource, then the time that the meeting is to be booked. This may be a meeting booked in the Studio Resource for example, or a meeting booked for a specific Trainer.

In the case where a meeting is with a Trainer in a Resource room for example, 2 meetings would need to be added, - one for the Trainer and one for the Studio.

From the Add Meeting screen, a note can be added to the meeting, the time can be edited, and the meeting can be set to repeat at set intervals, until a designated date

A Resource is a room or area in which Services, Classes and Meetings can be scheduled. By default, Class bookings are enabled, so this may need to be reviewed depending on the Resource type, as a Resource can also refer to Equipment that can be booked, eg yoga mats or swimming goggles etc, meaning Class Bookings would not be relevant, in that instance.

Select the configuration type

- Service Configuration
- Class Configuration
- Resource Configuration**

Search Resource

[+ Add New Resource](#) [+ Manage Resource Groups](#)

You can drag and drop to reorder the resources, or click on the arrows in the order column to set the display order of resource.  
Add trainers by ticking is trainer in user's profile in user administration.

Resource Name	Resource Group	Club		Order
Goggles	Equipment	Iron Gym 24/7 Fitness		
Poolies	Equipment	Iron Gym 24/7 Fitness		
Studio	Facilities	Iron Gym 24/7 Fitness		
Pool	Facilities	Iron Gym 24/7 Fitness		
Weight Room	Facilities	Iron Gym 24/7 Fitness		
Tanning Salon	Facilities	Iron Gym 24/7 Fitness		
Johnny Smithson	Trainers	Iron Gym 24/7 Fitness		
Sarah Smith	Trainers	Iron Gym 24/7 Fitness		

Trainers can also be designated as a Resource, allowing their time to be booked / managed via the Schedule.

Trainers\*

<< < 04-08-2019 > >>

Time Johnny Smithson

1:15 pm		
1:30 pm	Derek Gonzalez - PT 60	
1:45 pm		
2:00 pm		
2:15 pm		
2:30 pm		
2:45 pm		
3:00 pm		
3:15 pm		

Once a Trainer is selected, the appropriate Service can be added from the Member's available benefits, as well as any equipment that may be required for the session.

Member Derek Gonzalez - PT 60  
#9905 1 Month Paid in Full [Check In](#)

Service PT 60 - Member Casual \$70.00

Date 04-08-2019

From 1:30 pm To 2:30 pm (1 hr)

Resource Johnny Smithson

Equipment Goggles

Note

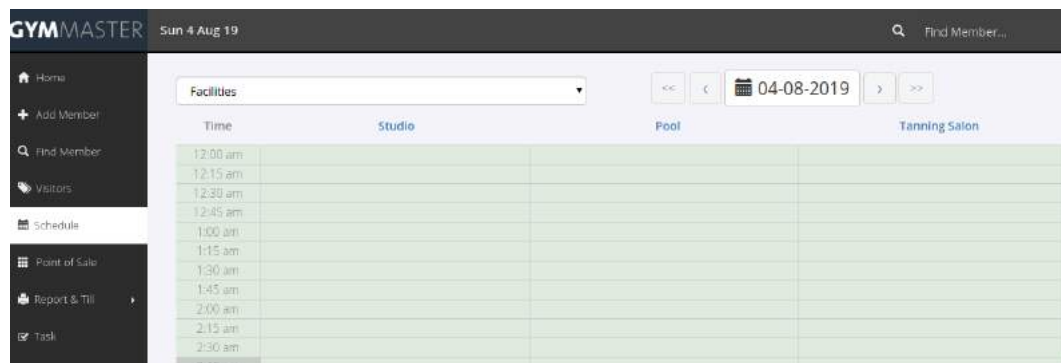
Price \$70.00

[Pay Now](#) [Confirm Booking](#)

[Cancel Booking](#) [Back to Calendar](#) [Save Booking](#)

[Table of Contents](#)

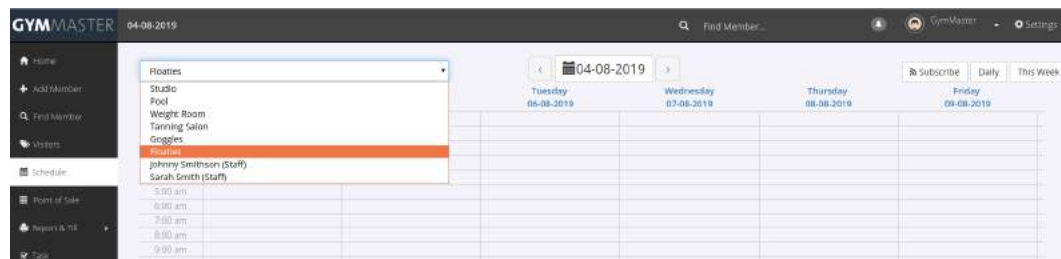
In order to manage Resource Schedules, Resources can be organised into Resource Groups. A Resource Group is a collection of similar Resources that can be selected for booking under one Schedule view. For example, a Studio, Pool or Tanning Salon could be grouped together under a Resource Group called Facilities, or multiple Trainers could be grouped into a Resource Group called Trainers.



Management of Resources and Resource Groups is handled from the Settings - Bookings and Classes menu option. From here, new Resources can be added or edited, and Groups can be managed also.

Adding a Resource Group allows for the Group to be named, have the default Schedule time increment set, and be assigned to a specific Club. Where appropriate, the Group can also be assigned a Type, of either Room or Equipment.

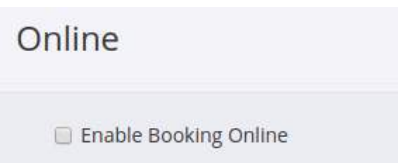
Switching between Daily and Weekly views displays Resources by day, or Resource Groups by week, allowing for simple management of bookings and time.



# Classes

Classes are added from Class Configuration menu, and allow for a default Class Length, a Class Group or a Seat Allocation to be set.

Seat Allocation is useful when there are limited or reserved resources in the Class, such as spin bikes for example, or where the members may wish to reserve a certain piece of equipment, or a position in the room.



Online Booking can also be enabled from the Add New Class configuration options, which will enable Members to book Classes directly from the Member Portal.

Restrictions and Limitations for Classes can also be set from the Add New Class options, allowing for a maximum number of attendees in a class to be set.

Additional Restrictions provides options for limits on the maximum number of Members on a Wait List for a class, age limitations where required, for example an Over-60s Class, and settings relating to Prebooking and Cancellations.

Cancellations can be restricted to only being available up until a certain time period before the Class in question, with Classes not able to be cancelled once the designated time period is reached.

There are 2 settings for minimum Cancellations - one for personal bookings, eg PT Sessions, and the 2nd for Class Bookings.

Earliest Pre-Booking Days	5 Days
Latest Pre-Booking Hours	1 Hour
Minimum Cancellation Period	6 Hours
Auto-Cancel Attendee Limit	5 <small>The class will be automatically canceled if there are less than this many attendees. Leave blank to disable this.</small>
Auto-Cancel Delay	6 Hours <small>How far ahead to automatically cancel the class if the attendee limit is not reached.</small>

The Class Booking Cancellation setting is available when adding a new class from "Add New Class" or changing a current Class from the "Edit Selected" pencil icon in the Settings - Bookings and Classes menu.

The personal booking Cancellation setting can be located in Setting - Member Portal, under the Bookings section.

Minimum booking cancellation period

6

minutes

Minimum time before a booking that a member can cancel

Default Value: 1 day

Last Changed: 23/08/2019 11:04 AM

Member Portal Set Up

General

Billing

Bookings

Class Bookings

Class Schedule

Communication

Enquiry

Member

Training

Manage Asset Files

API

Q

Save

Show Hidden

☐ Complete questionnaire once

Minimum booking cancellation period

0

hours

Maximum time allowed before booking session

14

days

Minimum time allowed before booking session

seconds

Classes can also be set to automatically cancel if a chosen number of attendees is not reached, with the delay period for this being adjustable also. This would allow a Class to be set to automatically cancel if there were less than 10 bookings, 2 days before the Class, for example.

Select the configuration type

Service Configuration

Class Configuration

Resource Configuration

Search Classes

+ Add New Class

+ Manage Class Groups

Go to Member Portal Class Calendar

Class Booking Settings

Class Name	Member Casual Price	Non-Member Casual Price	Max Students
Box Fit	\$10.00	\$10.00	24
Creche	\$5.00	\$5.00	25
Kick Box	\$50.00	\$50.00	25
Spin Class	\$0.00	\$20.00	10
Vinyasa Yoga	\$0.00	\$15.00	25

If the Auto-Cancellation setting is selected, it will also need to be enabled in the Class Booking Settings menu. Once enabled, specific Auto-Cancellation settings can be configured for each Class.

Class Bookings

☐ Auto-cancel classes without enough attendees

A standard SMS or Email template can be set to notify members of a Class that's been auto-cancelled. This can be created or edited in the Settings - Templates menu.

In order to make a Booking, a Service must be selected also. An example of this might be a booking for a Trainer, where the Service being booked is a 30 minute Personal Training Session.

Services are added or managed through the Bookings & Classes menu. This menu also allows for Services to be managed by using Service groups which enables Services to be restricted to certain Clubs and Resources, as well as requiring Rooms and/or Equipment to be assigned when making the booking for the specified Resources in the Service Group.

Restrictions/Limits

Club

Gym

Fitness

Allowed Resources

Studio

Pool

Weight Room

Tanning Salon

☒ Require a room to be assigned when booking services in this group

☒ Require equipment to be assigned when booking services in this group

When configuring Services, the Bookings Settings menu provides a comprehensive list of options for managing the appearance of the Schedule and actions and communications related to Bookings

Select the configuration type

Service Configuration

Class Configuration

Resource Configuration

Search Services

+ Add Service

+ Manage Service Groups

⚙ Booking Settings

Service	Description
Demo	Demonstration to a new Client

Where a Trainer’s service is being booked, a Commission for the Trainer can be automatically calculated via the final setting in the Add Service options. This setting allows for a Commission to be calculated at a flat rate per booking, as a percentage of the cost of the Service being Booked, or the Commission can be disabled.

Trainer Commission

Commission Type

Percentage

Commission Recipient

Trainer booked in schedule

Trainer Commission Percentage

20

The Trainer to receive the Commission can also be specified, with the option of either the Trainer booked in the Schedule, or the Member’s default Trainer as set in the Member’s Details screen.

This option may apply if the Member’s usual Trainer refers the Member to a Booking or Class by another Trainer, but still receives the Commission for the referral.

Commissions can be reported via the Trainers Commission report, under Reports & Till

## Point of Sale / POS

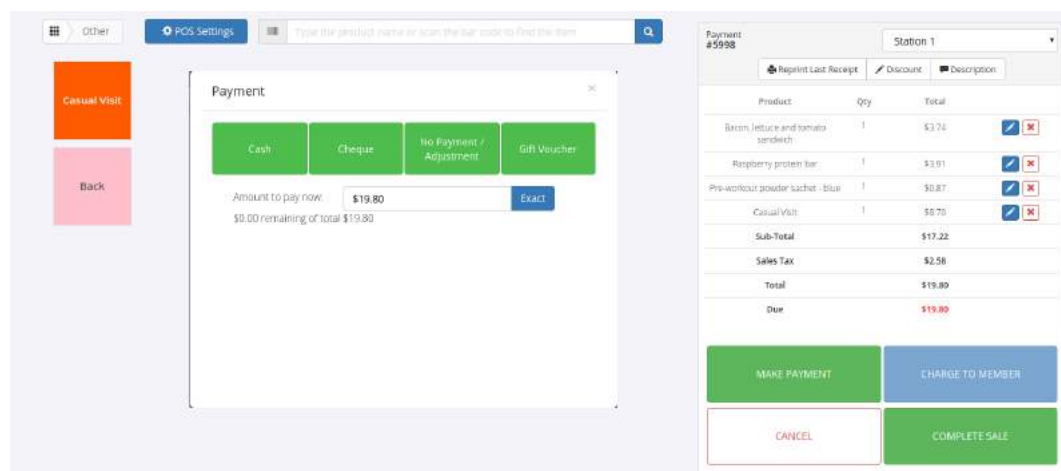
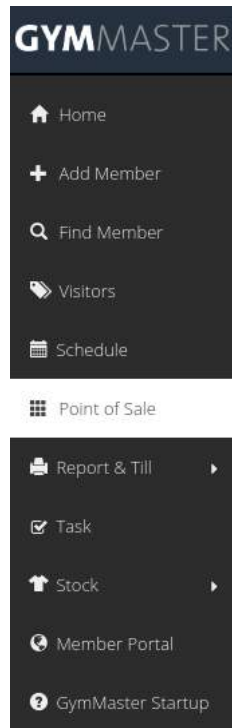
Point of Sale is where sales for goods and services are processed.

This can include food, drink, equipment, vouchers, general visits or any other items that have been previously set-up via Settings - Products, and are not covered under a member's contract. The Products section is also where products are added or removed from inventory, current products can be edited, stock deliveries are entered into the inventory, stock-takes can be run, and vouchers can be administered.

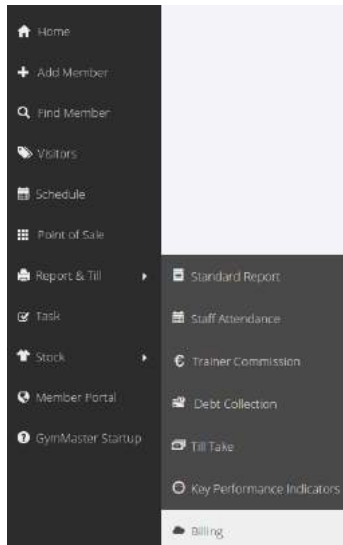
In the POS screen, staff can search for items or scan barcodes if enabled, to add items to the current transaction. The default setting is for POS charges to be added to the member's account, however Make a Payment allows for POS cash transactions, or payment by Cheque or Gift Vouchers, or alternatively the Sale can be made complimentary via the No Payment/Adjustment option.

Under the POS Settings, you can set whether non-current members can accrue charges, prompt to add any outstanding charges to the current sale, force staff selection when processing a POS transaction, choose if receipts are printed by default via a thermal printer or PDF, toggle Cash Out and General Sale visibility options for staff or admin, and add a custom title or custom message at the bottom of your receipts.

Payments can be processed via cash, cheque, vouchers or charged directly to the member's account.



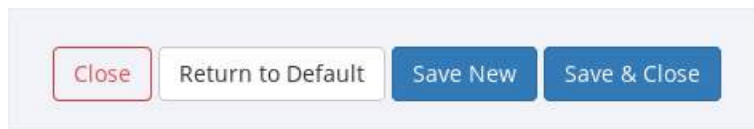
## Report and Till



Report & Till provides a number of preloaded reports to allow you to drill into the data and performance of your business. Some standard reports are available directly from the side-bar menu drop-down, including Staff, Trainer, Debt, Till Take, KPIs and Billing - with the full list of reports available from the Standard Report menu.

All reports can be customised as required via the Edit Report button. Once in Edit mode, you can edit the Report's Name and Description, Add and Reorder Fields, and add Filters to the Report.

This will allow you to customise what's included in the Report, as well as choose to have it run automatically at a predetermined interval, and it can also be delivered to a designated email address once run.



To create a New Report, select Edit Report and then Save New. This will create a copy of the Report for editing. Once all changes are made, select Save & Close.

Selecting Close will close without saving.

Return to Default on a Standard Report will revert all changes back to default fields

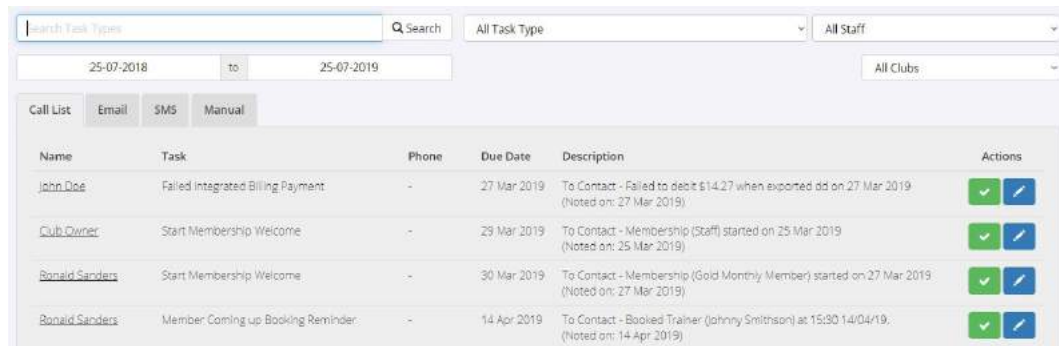


For reports covering a lot of data, you can choose to run the report in the background, and the system will notify when the report has run. Reports are run by clicking the Show Report button.

Once a Report is complete you are able to export the data to a spreadsheet for further analysis, contact all members included in the report via SMS or email, process a charge to all or some of the included members, and print the report if required.

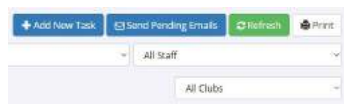


## Tasks



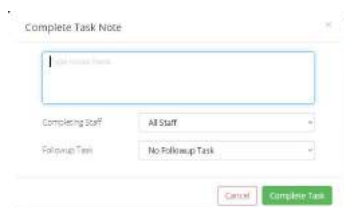
Name	Task	Phone	Due Date	Description	Actions
John Doe	Failed Integrated Billing Payment	-	27 Mar 2019	To Contact - Failed to debit \$14.27 when exported dd on 27 Mar 2019. (Noted on: 27 Mar 2019)	
Club Owner	Start Membership Welcome	-	29 Mar 2019	To Contact - Membership (Staff) started on 25 Mar 2019. (Noted on: 25 Mar 2019)	
Ronald Sanders	Start Membership Welcome	-	30 Mar 2019	To Contact - Membership (Sold Monthly Member) started on 27 Mar 2019. (Noted on: 27 Mar 2019)	
Ronald Sanders	Member Coming up Booking Reminder	-	14 Apr 2019	To Contact - Booked Trainer (Johnny Smithson) at 15:30 14/04/19. (Noted on: 14 Apr 2019)	

The Task section is where you will see calls to action assigned to your staff, or that will be run automatically, depending on how they are set up. Common Tasks could include welcoming new Members, reminders to Members with outstanding balances, birthday greetings, waitlist openings or any similar type of scheduled or repetitive contact action.



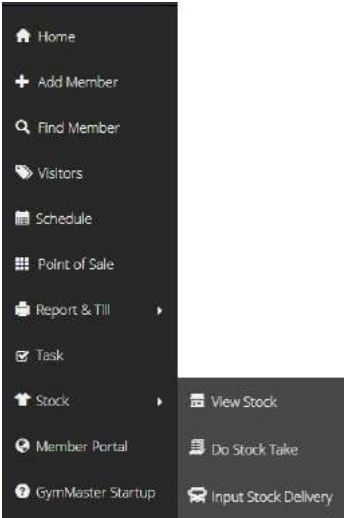
Tasks will appear in the Task List based on events or conditions (Triggers) as set under Settings - Task Setup, and can be assigned to an individual staff Member, to teams or to all staff, for follow up. Alternatively, the Task action can be set to occur automatically in the background, via email or SMS. The task list can be filtered by Task, or by the staff member or team (eg Trainers) the task is assigned to.

New Tasks can be added from the Add New Task button, selecting from any of the current Tasks loaded through the Settings option. You can also opt to bulk send any pending emails, refresh the Task list to update any recent changes or additions, or print the current list of Tasks.



Tasks assigned to staff can also be emailed to them for action, or they can work directly from a personal or facility-wide list, allowing them to check them off once completed via the Tasks dashboard, adding any applicable notes or follow up tasks where appropriate.

# Stock



The View Stock menu will allow you to view current stock on hand by Date, Product Type or Supplier. If you have multiple facilities or Clubs, you can also filter to show all, or by facility.

Do Stock Take will process a stock-take for your club/facility, for the date and time the report is run, and will show total stock movements and resulting balances based on the opening inventory at the time, and any stock movements since then. Each line included in the stocktake can have a Reason attributed to it where applicable, and the report can be printed for your records.

Input Stock Delivery is where you add inwards stock deliveries to your inventory. When keying the inwards goods into your stock, you can filter by Supplier or Product Type to simplify the data entry process.

A screenshot of the 'View Stock' interface. At the top, there are filters for Date (25-07-2019), Club (All), Product Type (All), and Supplier (All), along with a Print button. Below the filters is a search bar with the placeholder text 'Enter the product's name or scan its bar code to find it'. The main area contains a table with the following data:

Product Type	Product Name	Sold since last stocktake	Purchased	Quantity	Stock Value
Food	Apple	1	0	-1	\$0.00
Food	Bacon, lettuce and tomato sandwich	1	0	-1	\$0.00
Food	Banana protein bar	1	0	-1	\$0.00

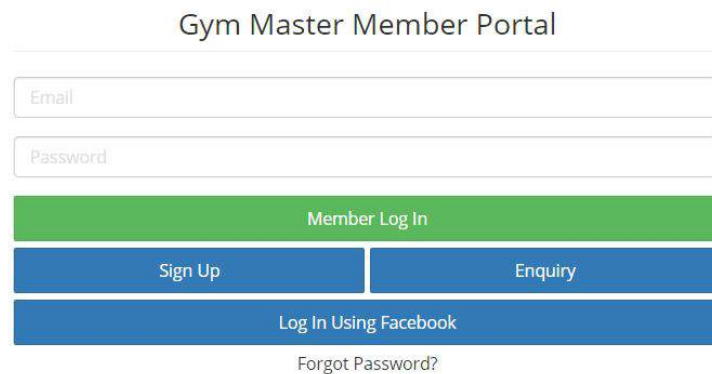
## Member Portal

The Portal provides easy, instant access to your facility's Classes and Bookings, allowing Members to manage their Memberships.

It can be added directly to your facility's website, and will enable potential new Members to make an enquiry, or sign up for a Membership.

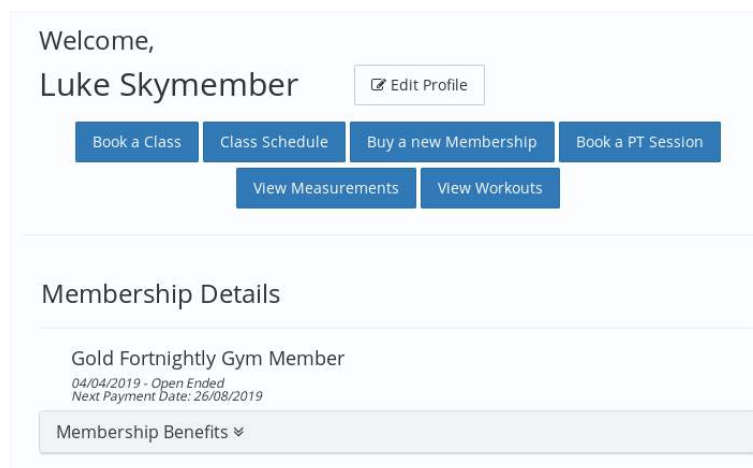
Current or new members can also refer a friend via the Portal, generating leads for future Prospects.

If made available in your facility via a kiosk tablet or similar, it can also be a quick and simple option for Members to book or manage classes while on premise.



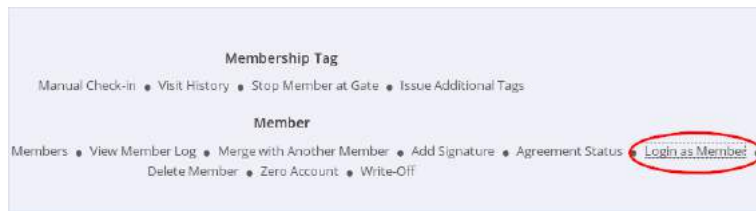
The image shows the Gym Master Member Portal login interface. It features a title 'Gym Master Member Portal' at the top. Below the title are two input fields: 'Email' and 'Password'. Under these fields are four buttons: a green 'Member Log In' button, a blue 'Sign Up' button, a blue 'Enquiry' button, and a blue 'Log In Using Facebook' button. At the bottom, there is a link for 'Forgot Password?'.

Using the Member Log In button, current Members can log in and access their Class Schedule, Book a Class or Session, review their Visit History, manage Current Bookings, View Payments and a number of other functions as set up via Settings - Member Portal.



The image shows a member dashboard for 'Luke Skymember'. It starts with a 'Welcome, Luke Skymember' greeting and an 'Edit Profile' button. Below this are six buttons: 'Book a Class', 'Class Schedule', 'Buy a new Membership', 'Book a PT Session', 'View Measurements', and 'View Workouts'. The section is titled 'Membership Details' and shows 'Gold Fortnightly Gym Member' with dates '04/04/2019 - Open Ended' and 'Next Payment Date: 26/08/2019'. At the bottom, there is a 'Membership Benefits' dropdown menu.

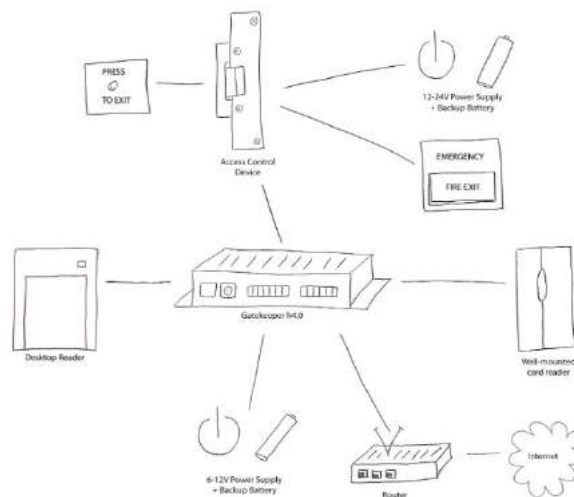
[Table of Contents](#)



Staff can also use Member Portal to review, update or manage Bookings for specific members, by logging into the Member's portal via the "Login as Member" option at the bottom of a Members profile page.

## Access Control

The Gatekeeper System enables Member access control and management, by linking a Member's keytag to the door access Benefits loaded against that Member in your GymMaster software. This enables your members to self check-in and gain access through the doors at your facility.



The system consists of a central control unit, the Gatekeeper, and depending on your facilities requirements: door readers, locks, desktop reception readers and connections to your point of sale register & printer.

It is recommended that Gatekeeper installation is carried out by a qualified electrician or security installer, following the [Installation Instructions](#). It is important that the instructions are followed carefully.

When choosing an installation location, ensure the central unit is positioned for easy access to the indicator lights on the front panel, allowing for simple trouble-shooting if required.

Should any issues occur with your Gatekeeper access or control system, please follow the [Trouble-Shooting Guide](#) in the first instance.

[Table of Contents](#)

Once a gatekeeper system is set up, the door readers and doors can be set up, managed, manually opened or deleted via the Settings - Door Reader menu.

<a href="#">New Door</a> <a href="#">Card Issues</a> <a href="#">Door Reader Settings</a>					
Door Number	Door Name	Status	Gatekeeper Location	Gatekeeper Status	Member Check-in
1	Reception	Active	Gatekeeper: H4,1	Offline	<a href="#">Open page</a>

The Door Readers menu provides an at-a-glance look at all of the readers in your GymMaster system. From here you can see the door names, the status of each of your doors, the Gatekeeper location and status, and open a kiosk check-in mode for self check-in via Key Tag swipe, or via the QR code reader in the [Mobile App](#).



When editing the readers, each is associated to a certain Facility as well as a particular Gatekeeper at that Facility. Be sure to choose a name that will help you to identify which reader a Member has swiped, as this detail will be reflected in your Visitors list. The status of the door can also be changed from Open (unlocked) to Locked, or set to Active, making it responsive to key tags being presented to gain access.

As a Member may have a Concession pass as opposed to an ongoing membership, the reader can be set to prioritise counting Concessions on their Membership over Visits, or alternatively to not count Visits at all, in cases where the reader is not set up on a main entry door, eg a shower facility or similar, where internal access control is required.

Where a door reader is set to control access to a Resource or room, it can be set to automatically book a Member into the session being run in the room at that time, or alternatively, deny access to a room or Resource if the Member does not have a Booking.

Controlled doors can further be restricted by being designated as a Restricted Door, thereby excluding the door from Members with "All Doors" access. This may be useful for Staff Only access, for example. Any door can also be assigned as Female Access Only, where required.

The final options allow a toggle for displaying the door information in the Last Visits report, designating the door as an Exit Door, and setting the door up as a Tailgating door, where the

Tailgating service is enabled.



A current summary of your Gatekeeper status is located at the bottom of Door Control page, with the option to Restart the software or to Reboot the hardware, located in the menu option just above.

## Feedback

We are committed to our client's success, and welcome all feedback.

If there's anything you need extra assistance with, or would like added to this guide, please get in touch via the [Contact Information](#) at the start of the guide, - we'd love to hear from you.  
The Team at Gymmaster