



the complete gym operating system



ONBOARDING CHECKLIST



This interactive guide will lead you through the initial set-up of your new GymOS system.

Your onboarding specialist is
ROMAN PITTS-BRENNAN
who will assist you through this process.



Using this checklist

We are delighted to welcome you to the community of GymOS gyms.

This checklist has been created to lead you through the initial set-up of your new system in a logical manner, ensuring that you cover all necessary bases.

We recommend that you print a copy of this document, so that you may check-off your progress as you work your way through.

Each section guides you through a specific aspect of GymOS. Some areas may not be immediately relevant to your facility and things that you set up in the future. Your onboarding specialist will help you identify these.

Every checklist item comprises a task, a brief description of the actions you're undertaking, and a link to comprehensive online help articles. Follow each link in turn for guidance in how to complete a given task.

Help is at hand...

Very few gym owners enjoy setting up a new system, but remember, many of the tasks in this guide are things you only need undertake once. Once set up, GymOS will then take care of many aspects of your system operation, leaving you to focus on running your business.

Your onboarding specialist is here to assist you through the process.



If you need assistance outside of your scheduled calls, simply click the **Help** button at the top of the GymOS dashboard and open a support request. The team will reply to you as soon as possible, typically within 1-working hour.

General system configuration

We shall start by getting the basics of your new system configured. Many of these tasks you will seldom need to revisit.

#	Task		<input checked="" type="checkbox"/>
01	Subscription payment method If you did not do so during sign-up, add a payment method for your GymOS subscription. This will activate your account functions.	Learn more	<input type="checkbox"/>
02	Basic business information Configure your business information, including registration numbers, language and time zone. These are used in many places throughout GymOS.	Learn more	<input type="checkbox"/>
03	Upload your logo Upload your gym logo. This should be a maximum of 3Mb in file size, and a minimum of 1000px x 1000px dimensions.	Learn more	<input type="checkbox"/>
04	Enable documents & uploads Enable your members to upload documents or photos for your review.	Learn more	<input type="checkbox"/>



Having added a payment method, it may be **up to five minutes** before your account is fully active.

Integrations

GymOS is predominantly an all-in-one system, but there are some specialist or regulated services with whom we integrate.

#	Task		<input checked="" type="checkbox"/>
01	Connect to Stripe for credit/debit card processing Do <u>not</u> connect to an existing Stripe account. Instead, create a new sub-account, and connect GymOS to that. It is important not to connect to a Stripe account that already holds data.	Learn more	<input type="checkbox"/>
02	Connect to GoCardless for Direct Debit processing If you wish to allow your members to pay for memberships using Direct Debit, connect your GymOS account to GoCardless.	Learn more	<input type="checkbox"/>
03	Vanity URL Share your chosen FitnessHub URL and outbound email address with your onboarding specialist. In turn, they will provide you with some instructions for how to configure your domain name to work with your choices. An example URL: <code>members.mygym.com</code> An example outbound email: <code>info@mygym.com</code> The domain must be owned by your business.		<input type="checkbox"/>



Unlike many management systems, GymOS doesn't sit between you and your money.

Whilst GymOS facilitates the payments, the Stripe & GoCardless accounts are your own. Quoox does not take a cut of any of *your* revenue.

Your facility

Let's tell GymOS and your members a little more about your facility.

#	Task		<input checked="" type="checkbox"/>
01	Venue Your primary venue has already been created, but you should go through and provide further information about it. You should also upload photographs. This will assist your leads and members, plus it will bring life to your FitnessHub site.	Learn more	<input type="checkbox"/>
02	Venue areas Create the sub-areas within that, and in which you can run sessions or hold consultations. Make sure you set the capacity for each area.	Learn more	<input type="checkbox"/>
03	Set up your "online venue" Link your Zoom account to GymOS, so that you can conduct hybrid sessions or consultations.	Learn more	<input type="checkbox"/>



Adding information about your venue, such as where to park, can assist your members enormously. It can also save you repeating yourself a hundred times, when you are repeatedly asked the same questions!

Your team

Now it's time to get your team added into GymOS. As with much of the initial set-up, it is likely that you will only revisit these settings when you have new or exiting personnel.

#	Task		<input checked="" type="checkbox"/>
01	Add your team Add your team one-by-one, ensuring you include their email and mobile addresses. Then, promote them to either be an employee or a manager, as appropriate.	Learn more	<input type="checkbox"/>
02	Add additional information You should now add more information about each member, or have them do it. You should include their profile and photograph, as this is shown to members in FitnessHub.	Learn more	<input type="checkbox"/>
03	Configure work locations and remuneration For each employee, add the location(s) at which they work, plus at least one role. You can set their remuneration to 0.00, if you do not want to include this information.	Learn more	<input type="checkbox"/>
04	Shifts and work pattern Add the shifts that your team will be working, sharing their availability with the GymOS system.	Learn more	<input type="checkbox"/>
05	Consultation availability If your team members work fixed hours (as opposed to shifts), you can set their availability for DropSlot consultations.	Learn more	<input type="checkbox"/>
06	Holidays & absences If you have any employees that already have holidays planned, you should record these.	Learn more	<input type="checkbox"/>
07	Recurring to-do tasks Configure any recurring to-do tasks that you have, such as cleaning, stock checks, or equipment checks.	Learn more	<input type="checkbox"/>

Your brand: Make it pop!

You want your leads/members to recognise your brand & identity, so we shall now configure the appearance and content of your FitnessHub app and member portal, along with email templates.

#	Task		<input checked="" type="checkbox"/>
01	Set your colours and logos in FitnessHub <i>Before having any members access the app, you will want to make sure you have it branded. Note: Accent colours should not be black or white.</i>	Learn more	<input type="checkbox"/>
02	Apply branding and styling to your email templates Immersive emails are a great way to send visually pleasing emails to your leads and members. Set up your templates to fit your style.	Learn more	<input type="checkbox"/>
03	Tailor your system messages GymOS has a suite of default system message content. Review and amend these as you see fit.	Learn more	<input type="checkbox"/>
04	Add your social media links By adding your social media links, these will be displayed in the FitnessHub member portal.	Learn more	<input type="checkbox"/>
05	Add your Facebook pixel, tracking and validate with Meta Add tracking elements to your FitnessHub page, including validating the FitnessHub URL (vanity URL) with meta.	Learn more	<input type="checkbox"/>
06	Register your domain name with Stripe GymOS automatically registers your FitnessHub domains with Stripe. To use Apple or Google wallet, you should ensure your own website is also registered.	Learn more	<input type="checkbox"/>
07	Customise your content Tailor the pages within your FitnessHub site so that they fit your brand and engage with your leads/members. You can create a custom homepage, as well as entirely new pages.	Learn more	<input type="checkbox"/>

Create and schedule your sessions

Let's get some sessions into your schedule, ready for your members to book in to.

#	Task		<input checked="" type="checkbox"/>
01	Get familiar with the fundamental principles Before diving into this section, take a few minutes to understand the GymOS scheduling principles. This will save you potential confusion and headaches later.	Learn more	<input type="checkbox"/>
02	Check your default session settings Check the settings you have configured for your sessions, ensuring they are appropriate and as per your intentions. Revise them as needed.	Learn more	<input type="checkbox"/>
03	Define your session types Define the types of session that you operate. Add descriptions and photographs to engage with your members.	Learn more	<input type="checkbox"/>
04	Schedule your sessions For each session type you create, schedule when it occurs.	Learn more	<input type="checkbox"/>

It is generally good practice not to show members more than about 28-31 days sessions in their schedule. Typically they cannot book beyond this period, and it may lead to frustration or confusion.



Create your membership products

Membership plans are typically the products you sell to your members. We shall configure these plans, the products they deliver, and their different payment plans.

#	Task		<input checked="" type="checkbox"/>
01	Get familiar with credit pack principles It is recommended that you spend 5 minutes familiarising yourself with the principles of GymOS credits and credit packs.	Learn more	<input type="checkbox"/>
02	Set up your credit packs Configure the credit packs that you will allocate to memberships, which will, in turn, allocate them to members on a recurring basis.	Learn more	<input type="checkbox"/>
03	Get familiar with the membership principles As you did with sessions and credits, it is worth spending 5 minutes familiarising yourself with the principles of GymOS memberships.	Learn more	<input type="checkbox"/>
04	Set up your membership plans/types The membership plan is a type of membership, E.g. "Gold". Add each of your membership plans.	Learn more	<input type="checkbox"/>
05	Configure one or more payment plans Set up the payment options for each of your membership plans.	Learn more	<input type="checkbox"/>
06	Assign credit packs to your membership plans Having set up a membership plan and it's corresponding payment plan(s), now assign the credit packs you created previously to the corresponding memberships.	Learn more	<input type="checkbox"/>

Add your members & leads

Having configured your products & schedule, it is now time to add some people into GymOS. How you do this may vary, depending on your rollout or transition strategy.

#	Task		<input checked="" type="checkbox"/>
01	Add your members Either add your members manually, or import them in bulk using the member import process.	Learn more	<input type="checkbox"/>
02	Assign memberships to members If you did not use the bulk import, or did not assign memberships as part of that, you should now assign memberships to your members. Set the start date to be the first date you want them to be charged by GymOS.	Learn more	<input type="checkbox"/>
03	Bulk assign credit packs (if necessary) Depending on your migration strategy, you might need to bulk assign some credits to members prior to their recurring membership kicking in.	Learn more	<input type="checkbox"/>
04	Send the welcome emails When you are ready for members to start accessing the GymOS system, send them their "welcome" emails.	Learn more	<input type="checkbox"/>
05	Add or freshen leads A new system is a good opportunity to freshen your leads and add only warm leads. You would do this by sending a GymOS campaign to all of your historical leads in your previous system. However, if you wish, you may import leads. Make sure you comply with GDPR legislation in doing so.	Learn more	<input type="checkbox"/>



Well done! At this point you successfully configured the *basics* of the GymOS system and you can start using it, if you wish.

In the coming steps we shall take you through additional tasks that will help you start to leverage gains from your new system, streamlining your gym operations.

Getting started with workflows

GymOS contains extensive functionality relating to the automated delivery of effective and powerful workflows. The steps below shall provide you a taster of some of these.

#	Task		<input checked="" type="checkbox"/>
01	Create a lead nurture program Add a nurture program that you may allocate to leads to ensure they have a consistent and regular flow of touch points.	Learn more	<input type="checkbox"/>
02	Create a member nurture program Similarly, create a nurture program for new or existing members that ensures every member receives a consistent onboarding experience.	Learn more	<input type="checkbox"/>
03	Set up triggers to assign the nurture programs Explore the new lead, new member, and membership triggers. Build yourself a workflow that suits your business to on-board new leads and members.	Learn more	<input type="checkbox"/>
04	Configure RoboNudge session booking reminders Help your members remember when their sessions are by configuring automated reminders in their run-up to their bookings.	Learn more	<input type="checkbox"/>
05	Add payment failure and card expired notifications Two example triggers worth adding are those to notify you/ members in the event of a payment failure (in addition to the system methods), and to remind members when they need to add a new payment card on to the system.	Learn more	<input type="checkbox"/>
06	Give it a go! Every user on GymOS has a corresponding member record. This is a great place for you to be able to test your configurations and experience the system as a member <i>before</i> you let members loose on it!		<input type="checkbox"/>

Check-ins, appointments & consultations

Getting your member check-ins under control and their scheduling automated is one area you can likely save a lot of time. As part of the process you can also set up consultation appointments for leads, and more.

#	Task		<input checked="" type="checkbox"/>
01	Review your team availability When you added your team you were guided to set up your team availability. It is worth reviewing that before proceeding.	Learn more	<input type="checkbox"/>
02	Add a DropSlot event type Set up a member check-in event, and perhaps a lead consultation event.	Learn more	<input type="checkbox"/>
03	Assign time restrictions, if required If necessary, configure overriding time restrictions to the event(s) to limit when you wish them to occur.	Learn more	<input type="checkbox"/>
04	Configure DropSlot event schedule(s) Set up a DropSlot event schedule(s) that you may assign to members for their check-ins (E.g., monthly).	Learn more	<input type="checkbox"/>
05	Allocate DropSlot schedules to your members Having created your schedules, now assign them to members. You can do this ad hoc or, perhaps best, via a membership or new member trigger.	Learn more	<input type="checkbox"/>
06	Be in the know when your members <i>don't</i> check in Consider setting up a <i>DropSlot Invitation Expired</i> trigger, so that it's brought to your attention when a member does not attend their regular check-in.	Learn more	<input type="checkbox"/>



Triggers and DropSlot events are extremely powerful and flexible tools within the GymOS system. You will find that you use Triggers for a wide variety of workflow requirements. They are extremely customisable and cover pretty much every scenario you might think of!

Exercise programming & tracking

GymOS provides several means for programming sessions, in-app sessions, and to track member progress. Using XRcize In-Person Trackable Sessions is a great motivation tool for your members.

#	Task		<input checked="" type="checkbox"/>
01	The principles of an in-person trackable session Before commencing, familiarise yourself with the principles of the in-person trackable session.	Learn more	<input type="checkbox"/>
02	Add your achievements Add the achievements (exercises/moves) that you wish to track. You can do this in bulk up-front, or one-by-one as you build up your trackable exercise session.	Learn more	<input type="checkbox"/>
03	Create your trackable sessions Set up your trackable workout sessions, which you may then link to an in-person session for your members to follow and record their progress.	Learn more	<input type="checkbox"/>
04	Assign your workout to a session Having created your workout(s), the next step is to assign them to the sessions for which they are relevant.	Learn more	<input type="checkbox"/>
05	Recognise achievements with reward badges Badges and kudos are a fantastic way of building your community, motivating your members, and achieving results.	Learn more	<input type="checkbox"/>



GymOS is an extremely comprehensive system. These tasks have taken you through the basics, plus a few of the value-add features. There are, however, dozens more that you will implement and benefit from as you continue your GymOS journey. Let's finish up with some final sanity checks...

Before you hit “go”...

Before you launch your system to your members, it is worth taking a few moments to sanity check your configuration. Every GymOS user has a corresponding member record that can be used for this purpose.

#	Task		<input checked="" type="checkbox"/>
01	Can you book as a member? Add a membership to your member record. Check the credits allocated are as you expect. Make sure you can book a session in the manner you planned.	Learn more	<input type="checkbox"/>
02	Make a test payment Make a small test payment (min. £0.50) through the store to ensure that your Stripe payment processing is working correctly in the live environment.	Learn more	<input type="checkbox"/>
03	Check your emails Send yourself test emails from GymOS. They will work, but ensure you are happy with their presentation. The email should arrive from your vanity outbound email address.	Learn more	<input type="checkbox"/>
04	Check the accessibility of your FitnessHub site Verify that your FitnessHub site is accessible as expected on your vanity URL. Ensure that the appearance is as you intended, and that any custom pages are displaying as you want.	Learn more	<input type="checkbox"/>



The Quoox GymOS team is here to support you in your usage of the GymOS system on a long-term basis. Our success comes from the success of our customers.

To raise a support ticket, click the Help button on the GymOS dashboard. We will be back to you, typically within 1 working hour.