

Gym Assistant Member Portal Instructions

May 2023

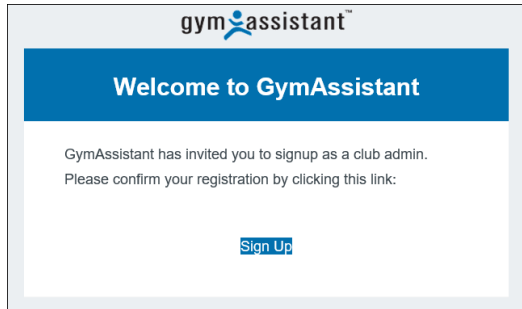
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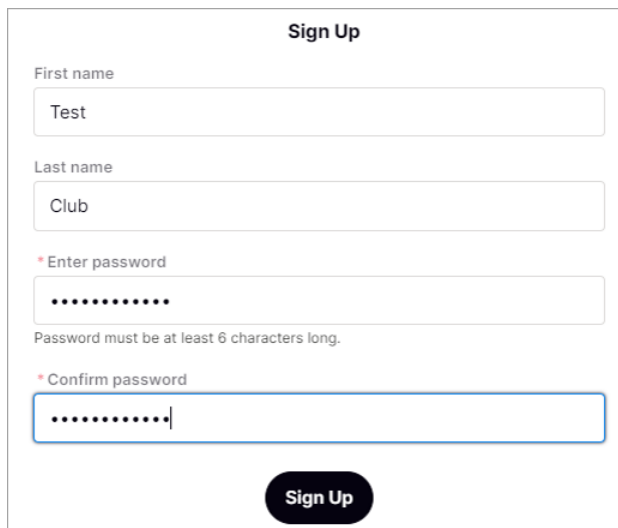
Portal Setup

Initial Admin Registration

You will receive an email with subject “Invitation to Gym Assistant”.



Click the **Sign Up** link.

A screenshot of the "Sign Up" registration form. The form is titled "Sign Up" and contains the following fields: "First name" with the value "Test", "Last name" with the value "Club", "* Enter password" with a masked password of 10 dots, and "* Confirm password" with a masked password of 10 dots. Below the password fields is a note: "Password must be at least 6 characters long." At the bottom of the form is a black "Sign Up" button.

Enter a first name, last name and a password. (Be sure to remember the password that you create!) Then click **Sign Up**.


You will then be redirected to the Sign-In page to log in.

Sign In

*Enter your email or phone number

*Enter your password

[Forgot password?](#)

✓ I'm not a robot


Sign In

This should be the password that you just created.

You can then login to the Portal any time at:

<http://portal.gymassistant.com>

Club Setup

 **clubdemoadmin@gymassistant.com**
[Edit Profile](#)

Clubs

▼ **gymassistant™** Club Demo - 1234 Edit

Email On Updates clubdemoadmin@gymassistant.com


SMS On Updates 510-865-1815

Send Notifications Options

Signups	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email
Payments	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email
eSignatures	<input checked="" type="checkbox"/> SMS	<input checked="" type="checkbox"/> Email

Click the **Edit** link to setup your basic Club Info.

Edit Club Info ×

Club Logo  Change

Terms of Service Edit

Message after signup Edit

Test Mode

Email On Updates ⓘ

SMS On Updates ⓘ

Send Notifications Options

Signups	SMS <input checked="" type="checkbox"/>	Email <input checked="" type="checkbox"/>
Payments	SMS <input checked="" type="checkbox"/>	Email <input checked="" type="checkbox"/>
eSignatures	SMS <input checked="" type="checkbox"/>	Email <input checked="" type="checkbox"/>

Payment Processor

Terminal ID

Cancel Save

Click the **Change** button to upload a logo for your club.

Click the **Edit** button to edit your **Terms of Service**.

Click the **Edit** button to edit your **Message After Signup**, which displays once a member completes the signup page.

Notifications

Enter one or more email addresses in **Email On Updates**. These email(s) will receive notifications about any portal activity, member signups, payments made, etc.

Enter one or more mobile phone numbers in **SMS On Updates**. These phone(s) will receive notifications about any portal activity, member signups, payments made, etc.

Under **Send Notifications Options** you can turn notifications on/off for each method.

Test Mode

Turn on Test Mode if you want to do some test transactions in the Portal. Test Mode will allow you to do member signup and member payments without charging a credit card. You WILL need to enter a valid credit card to do those transactions, but the card will never be charged or saved. We recommend that you turn on Test Mode initially until you have tested out all of the Portal functions. When you are ready to go “Live” you should then turn Test Mode back off.

When Test Mode is enabled the Portal will display a prominent banner to indicate that Test Mode is ON:

An orange rectangular banner with a warning triangle icon on the left and the text "This club is in TEST MODE. Credit card will not be charged." in a dark font.

⚠ This club is in TEST MODE. Credit card will not be charged.

Payment Processor Info

You should leave the Payment Processor information blank, because Gym Assistant will automatically upload that info to the Portal.

Click **Save**.

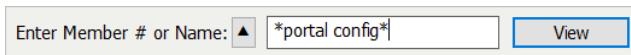
Gym Assistant Setup

Make sure that you have the latest build of Gym Assistant v2.6.0 by selecting Check for Update from the Help menu.

Contact Gym Assistant Support to setup and appointment for them to setup a Member Portal Account.

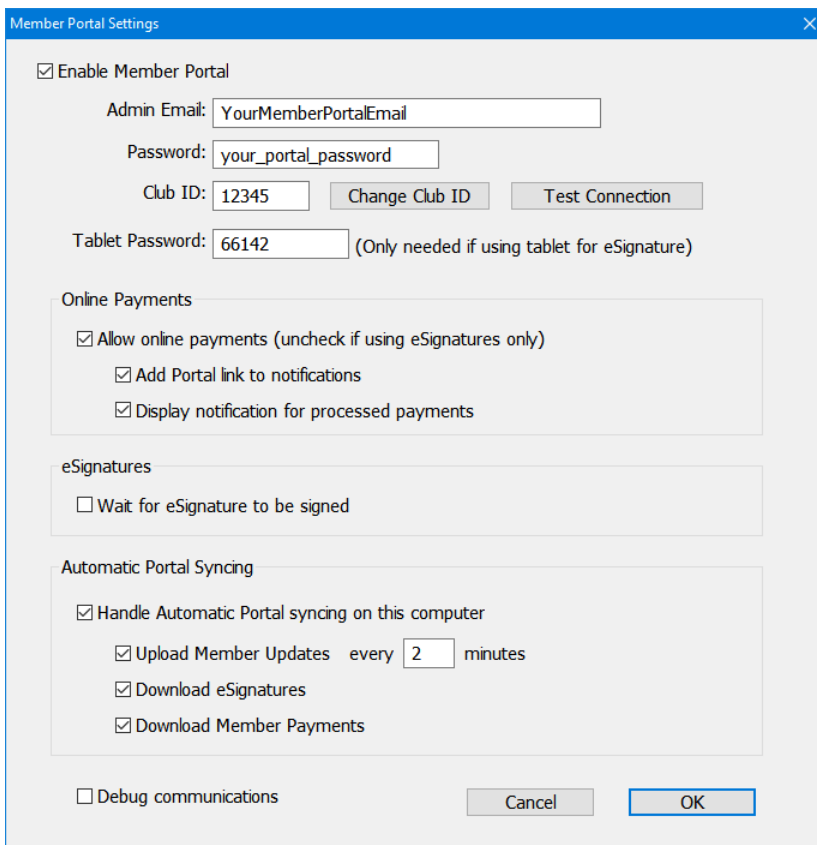
Setup the Member Portal

Enter the special command ***Portal Config*** (with asterisks) into the **Enter Member # of Name** field, then click **View**.



Enter Member # or Name: ▲ *portal config* View

The **Member Portal Settings** window will appear.



Member Portal Settings

Enable Member Portal

Admin Email: YourMemberPortalEmail

Password: your_portal_password

Club ID: 12345 Change Club ID Test Connection

Tablet Password: 66142 (Only needed if using tablet for eSignature)

Online Payments

Allow online payments (uncheck if using eSignatures only)

Add Portal link to notifications

Display notification for processed payments

eSignatures

Wait for eSignature to be signed

Automatic Portal Syncing

Handle Automatic Portal syncing on this computer

Upload Member Updates every 2 minutes

Download eSignatures

Download Member Payments

Debug communications

Cancel OK

Check the **Enable Member Portal** checkbox.

Enter the **Email** and **Password** that you used to setup your portal account.

Click **Test Connection** to confirm that the email/password are correct.

Online Payments

Check **Allow online payments** if you will be accepting credit card payments through the Portal.

- Check **Add Portal link to notifications** to add a payment link to notifications that will be sent to a member on a rejected recurring credit card payment or a denied access control entry.
- Check **Display notification for processed payments** to show an indicator in the main Gym Assistant when portal payments are processed in the background.

eSignatures

Check **Wait for eSignature to be signed** if you will be having members sign waivers in-person and you want to confirm that the waiver is signed before continuing.

Automatic Portal Syncing

Check **Handle Automatic Portal syncing on this computer** if you want this workstation to automatically process incoming portal information (eSignatures and payments) and automatically upload member updates to the portal. We recommend that only one workstation be specified for automatic portal syncing.

- Check Upload Member Updates to have this computer automatically upload member changes to the Portal. Also specify how often the updates should be uploaded.
- Check **Download eSignatures** to automatically download signed eSignatures. (eSignatures are downloaded every 60 seconds.)
- Check **Download Member Payments** to automatically download and import member payments. (payments are downloaded every 60 seconds.)

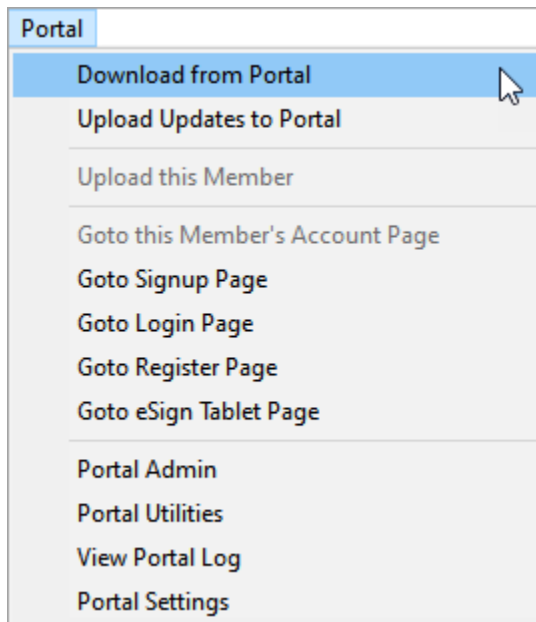
Debugging

Check **Debug communications** to have list all Portal upload and download information in the debug log. (This will slow Portal communications, so only check this box if requested by Gym Assistant Support.)

Click **OK** when finished. Gym Assistant will automatically restart.

Portal Menu

Gym Assistant will now have a Portal menu.



Download from Portal

Download all updates from the Portal.

Upload Updates to Portal

Upload all updates to the Portal, including changes to business information, membership plans and member records. This information will automatically be uploaded at a regular interval if specified in **Portal Settings**.

Upload this Member

Upload the currently displayed member to the Portal. This is useful if you have made any changes to the member record and want the Portal to reflect those changes immediately.

Goto Member's Account Page

Display the currently displayed member's Portal page in your default web browser.

Goto Signup Page

Display your club's Portal Signup page in your default web browser.

Goto Login Page

Display your club's Portal Login page in your default web browser. You or your member must have first created a Portal password (through the Register Page) to login.

Goto Register Page

Display your club's Portal Register page in your default web browser. The Register page allows your members to create a password to login the Portal any time.

Goto eSign Tablet Page

Display your club's eSignature page. This page is only used if you will have some of your members eSign documents in person on a tablet or laptop that you provide.

Portal Admin

Easy access to seldom-used Portal functions. (See **Portal Admin** below).

Portal Utilities

Access to special Portal features, which should only be accessed if requested by Gym Assistant Support.

View Portal Log

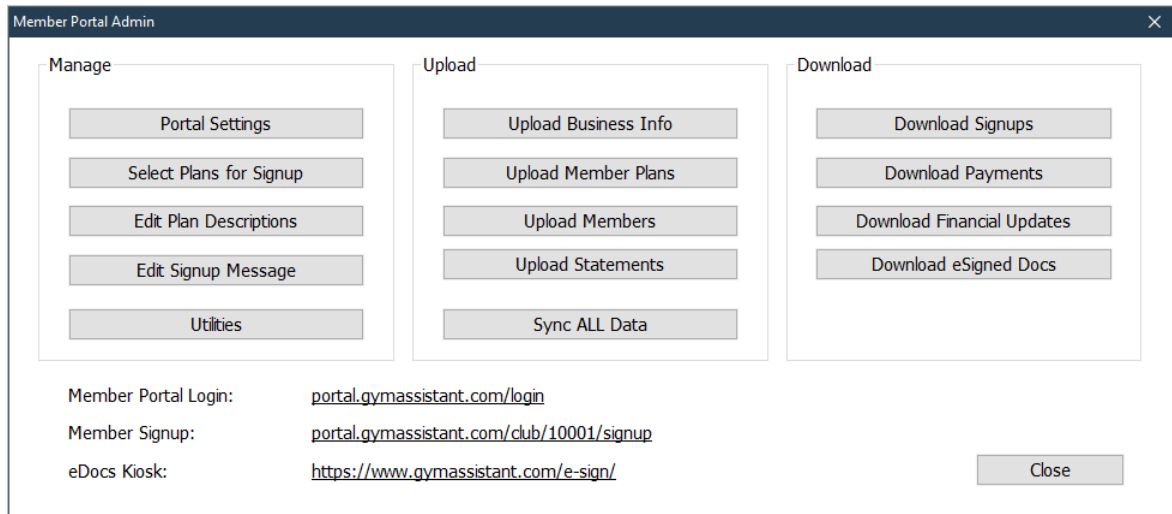
Display the Member Portal activity log.

Member Signups

First you must specify which membership plans will be available for online signup.

Portal Admin Window

The Portal Admin Window is where you will initially setup your member portal.

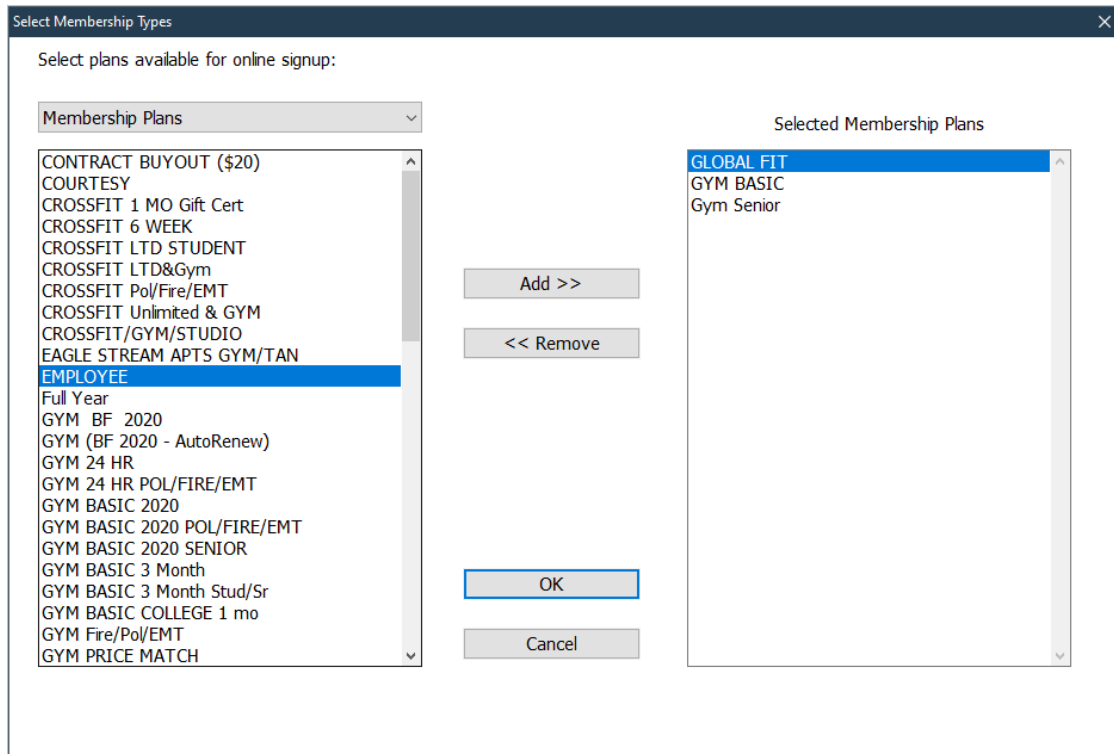


Note that there are three panels in the Portal Admin window:

- Manage Editing Portal settings and member plans for signup
- Upload Uploading your member data to the Portal
- Download Downloading signups, payments and eDocuments

Select Plans for Signup

In the Portal Admin window, click **Select Plans for Signup**.



Select membership plans that you want to make available for online signup.

- This window shows Unselected plans on the left and Selected plans on the right.
- To add a plan to the Selected list click on it and then click the **Add>>** button.
- To remove a plan from the Selected list click on it and then click the **<<Remove** button.
- To add a new plan or edit the existing plans, click the **Edit Plans** button.
- When you are finished, click the **OK** button to save the changes.
- To discard the changes you have made to the Selected list, click the **Cancel** button.

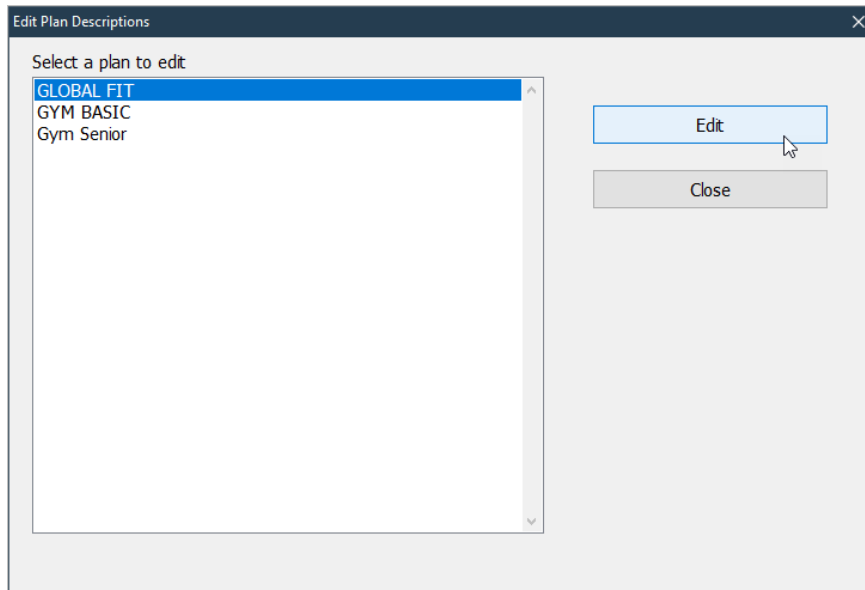
We recommend that you limit the number of plans available for online signup to just a few.

Note that all available billing options within a given plan will also appear on the portal. For example, if you have a membership plan with Monthly (manual), Credit Card and ACH options then at signup a new member will be see all three options at signup. Regardless of what billing option is selected the new member will make their initial payment with a credit card, and that credit card will be saved for future billing. If you want to make ACH billing available to a member then you will have to get that member's bank information after they sign up.

Edit Plan Descriptions

You can edit the descriptions that appear with each available signup plan.

In the Portal Admin window, click **Edit Plan Descriptions**.

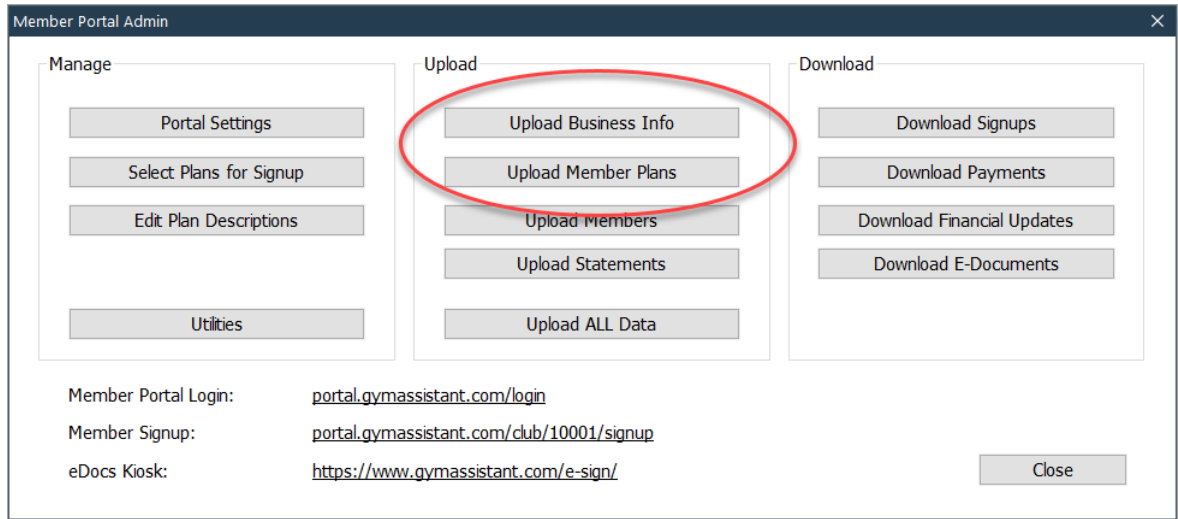


Select a plan, then click the **Edit** button.

You can add multiple lines and up to 512 characters of text for each plan, but we recommend that you be as concise as possible to keep things simple for your prospective customers.

Upload your signup info to the Portal

In the Member Portal Admin window, click **Upload Business Info** and **Upload Member Plans**, which will upload your general business info and selected membership plans to the portal.



Click **Close** to exit the Member Portal Admin window.

Member Signup Page

In the Portal menu, select **Goto Signup Page**.

Note: If you turn on Test Mode in the portal, then the Test Mode banner will appear on the Signup page.


New Member Signup Form

Please use this form to sign up for a new membership. For renewals please contact us at [510-555-1212](tel:510-555-1212)

* Select a Plan

Contact Information

* First name * Last name

Birth Date  Gender

* Email Address * Mobile Phone

Note: by entering your mobile phone you agree to receive text messages related to your membership.
Your carrier may charge you for these messages.

[+ Add Dependent Member](#)

Payment Information

* Credit Card Number

* Expiration Date * CVV

* Address

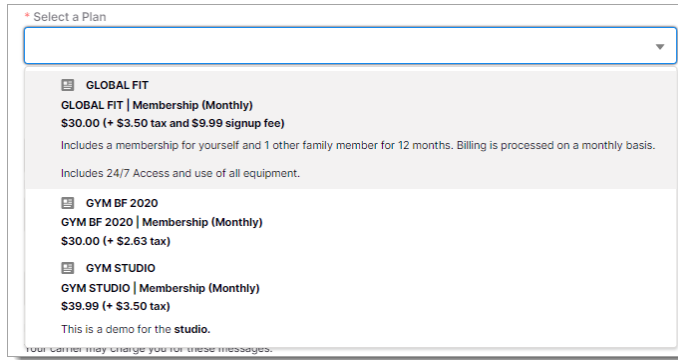
* City

* State * Postal Code

I agree to the [Terms of Service](#)

Click on the **Select a Plan** pulldown menu. It should display the membership plans that you selected and uploaded to the Portal. (see below)

Note: The initial payment will not be prorated. Prorating will be handled when you import the new member signup into Gym Assistant.



Each member plan will show:

- Member type name, e.g. "GlobalFit Gym"
- Type of membership, e.g. Membership (monthly), 10-Visits, etc.
- Membership price
- Description, which is text that you entered in the Portal Admin.

Currently the member signup only includes the following information:

- Name (required)
- Birthdate
- Gender
- Email (required)
- Mobile Phone (optional)
- Emergency Contact

Differences between Online Member Signup and In-Person Signup

When members signup in person Gym Assistant prorates their initial payment so that their first regular billing date will fall on a day of the month that you specify.

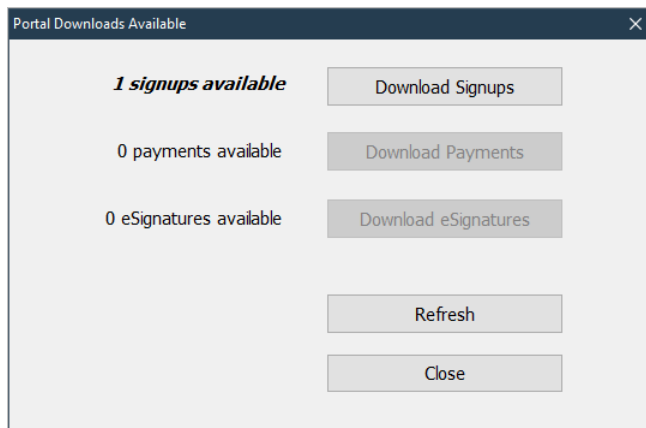
A member signing up online will pay a full month (plus any signup fees and taxes) at signup. Our intention is to simplify the member signup process as much as possible, so that you can collect their first month's payment and start their contract. You can still prorate their initial payment, but the difference will be made up in the member's first regular billing cycle.

Notifications

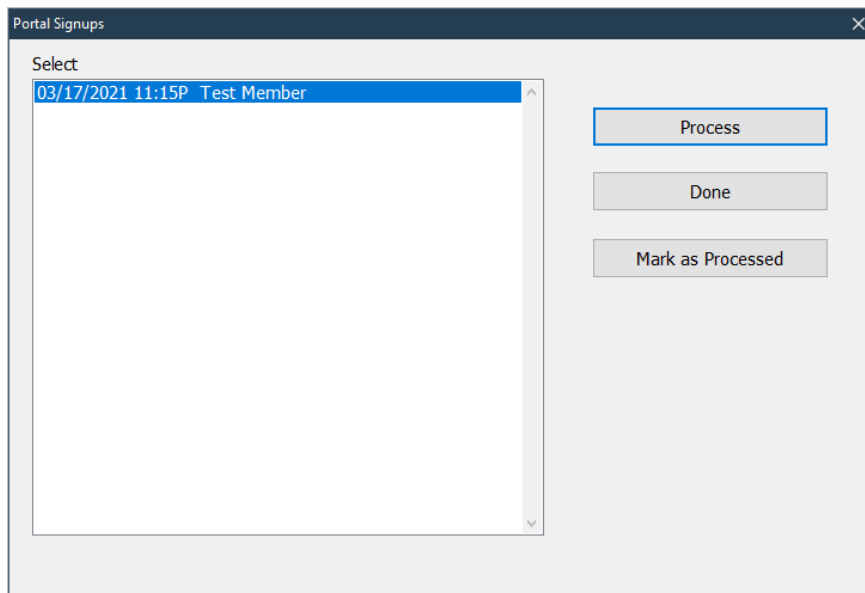
You should receive an email and/or text message whenever a member signs up on the Portal. No action is required in the email, it only serves to let you know that a member signup is available for download into Gym Assistant.

Importing New Member Signups into Gym Assistant

In the Portal menu select Check Portal for Updates.



If there are any signups available, click Download Signups.



Any pending signups will appear. Select a signup to process and click **Process**.

The same **Contract Info** window will appear that you see when a member signs up in person, with two additional fields at the bottom: **Subtotal** and **Pre-Paid Amount**.

Contract Info for Member #0, Test Member

Select a Plan

Plan Type:

Plan Selected:

Contract Term

Contract Begin Date:

Contract End Date:

Terminate Billing:

Billing / Payment Options

Billing Option:

Recurring Billing Amount: \$

Next Payment Due Date: Pro-Rate

Fees

Membership Fee: \$

Contract Fee: \$

Tax: \$ 0.00

Subtotal: \$ 24.02


Pre-Paid Amount: \$ (38.99)

Total Due: \$ (14.97) (Credit)

The member's initial contract information will appear. Make any appropriate changes, then click **OK** to continue. This is where you might reassign the member to one of your standard membership plans.

Again, note that new members will pay a full month at signup. If you normally prorate a member's first month then the difference between the full month and prorated amount will be credited to the member's account balance. This credit will be applied to the member's first regularly scheduled payment.

Gym Assistant

 The member paid \$38.99 at signup, but the amount due is \$24.02.

A credit of \$14.97 will be added to the member balance. This credit will be applied to the member's next scheduled payment.

The new member's full record will be displayed for editing.

The screenshot shows a software window titled "New Member: Edit Member Info for Member #0, Sally Member". At the top, it says "Review member information, then click OK to finish adding the member." Below this are three tabs: "Personal", "Contract", and "Other", with "Personal" selected. The form contains the following fields: "Membership #:" with a value of "0"; "First Name:" with "Sally" and "Last Name:" with "Member"; "Address1:" with "123 Sunshine Lane" and "Address2:" which is empty; "City/State/ZIP:" with a dropdown menu showing "Anytown OH 96521"; "Home Phone:", "Mobile:" with "5108651815", and "Work Phone:"; "Birth Date:" with "07/23/1987" and "Gender:" with a dropdown showing "F"; "Email:" with "sallymember@gymassistant.com"; and "Emergency Contact:" which is empty. At the bottom right, there are "Cancel" and "OK" buttons.

Click **OK** to continue.

The **New Member Finish** window will now appear.

The screenshot shows a software window titled "New Member: Finish for Member #2166, Sally Member". It contains the instruction "Please choose an action or click DONE when finished." Below this are five buttons, each with a label and a description: "Barcode" (Assign a Barcode to this member), "Photo" (Capture a Photo of this member), "Contract" (Print out a Contract for this member), "Edit" (Edit info for this member), and "Finish" (Finish adding this member). The "Finish" button is highlighted with a blue border.

eSignatures

With the Member Portal you can send documents to member for eSignature.

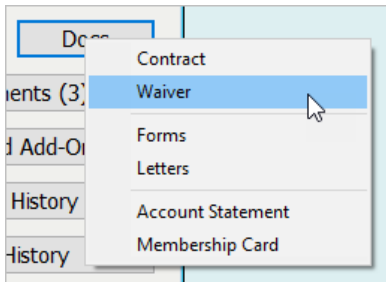
An eSignature document must be a complete document that the member will sign. It does not include areas for initials or additional fields to be filled.

Edit your document template for eSignature

No special changes need to be made to your document templates to prepare for eSignature. The member signature and a timestamp will automatically be placed at the end of the document.

Send a document to member for eSignature

While viewing a member record click the **Docs** button (on the right).



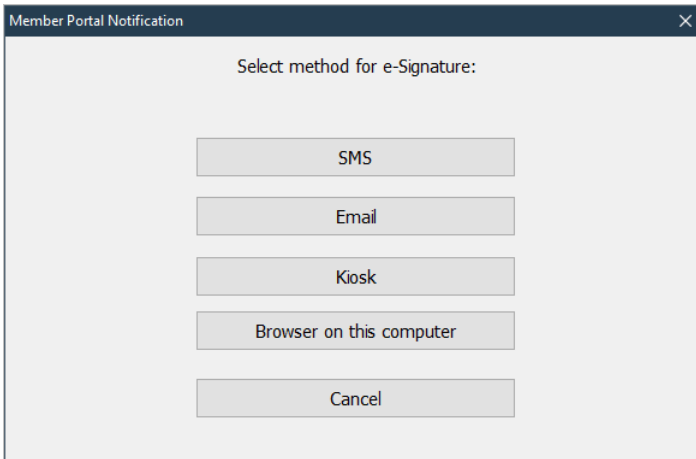
Select **Contract, Waiver, Forms** or **Letters**.

If you selected a command with more than one option, select an available document template from the list.

A screenshot of a web browser window titled 'Form Letter'. At the top, there are four buttons: 'Cancel', 'eSign', 'Email', and 'Print'. The 'eSign' button is circled in red. Below the buttons, the document content is displayed. The title is 'Waiver and Release of Liability' followed by 'Club Demo - 1234'. The date is '04/12/2021'. The membership information is: 'Membership #2', 'Happy Gilmore', '4708 Joyosofd Sltx', 'Zgecntdagji, Eq 64866'. The document text includes a section titled 'Waiver and Release of Liability' with several paragraphs of legal text regarding physical exercise and liability.

Click the **eSign** button. The document will be uploaded to the Member Portal.

Select the method you want for eSignature.



- SMS – a text will be sent to the member with a link to click
- Email – an email will be sent to the member with a link to click
- Kiosk – the document will appear on a tablet or laptop that you hand to the member
- Browser – the document will appear in a browser window

If you select SMS or Email then you then be asked if you want to wait for eSignature completion.

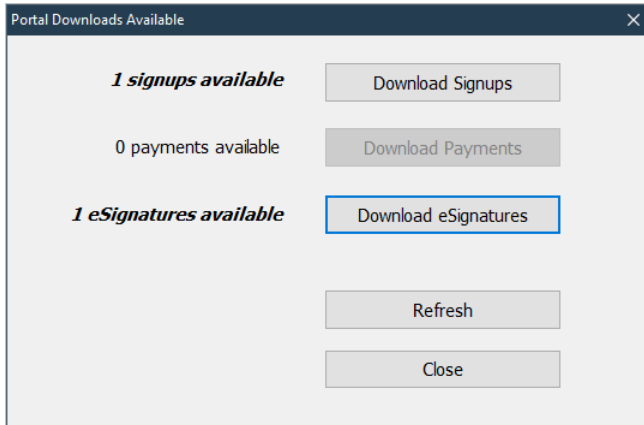


If the member is standing in front of you and you sent the document via SMS then you can click Yes. Otherwise click No, because you will download the signed document later.

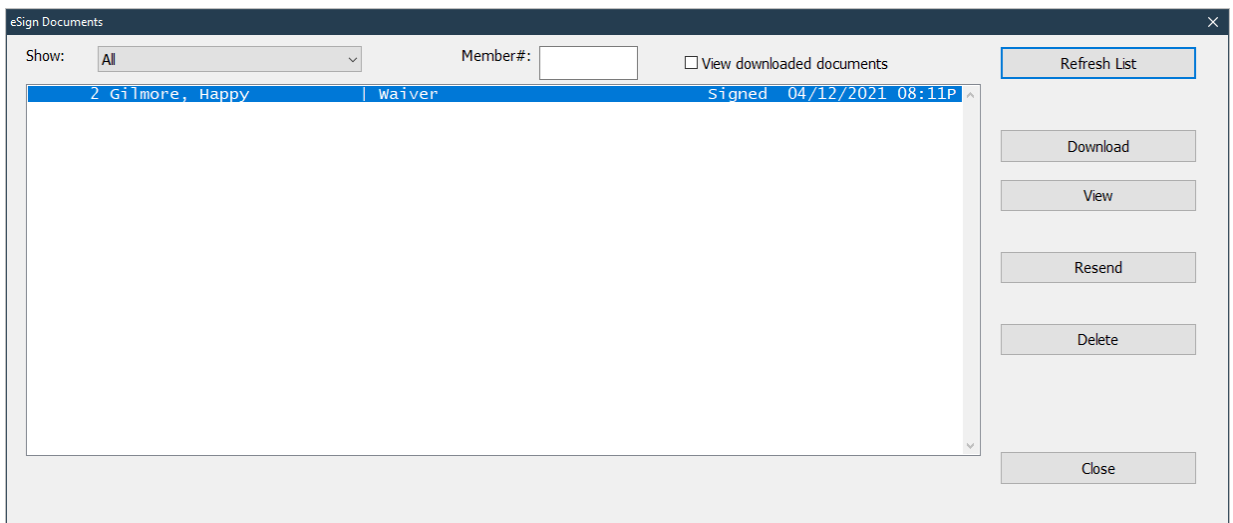
Retrieving eSigned Documents

All eSigned documents are saved on the Member Portal until they are retrieved (downloaded).

In Gym Assistant select **Check Portal for Updates** from the **Portal** menu.



Click **Download eSignatures**.



To download a signed document, click **Download**.

To view a document (signed or unsigned), click **View**.

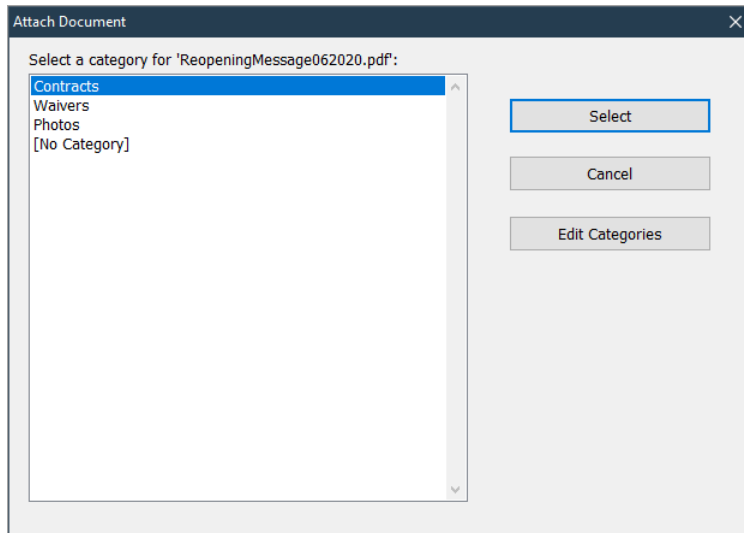
To resend an unsigned document, click **Resend**.

To delete a document, click **Delete**.

Downloading a Document into Gym Assistant

When you download a document Gym Assistant will automatically categorize the document if the name of the document matches one of the existing categories.

If Gym Assistant cannot determine the category then you will be asked to assign the document to a category.



Downloaded eDocuments are automatically placed in a member's Attachments folder.

Once a document is downloaded it will automatically be deleted from the Member Portal.

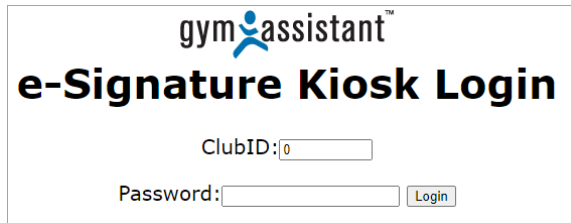
Using a tablet for in-person eSignature

For in-person eSignature of documents you can use a tablet or laptop computer.

In the eSign process select the **Kiosk** method to send the document.

Go to the following web page on the tablet:

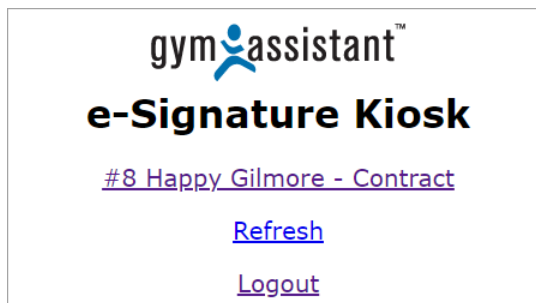
www.gymassistant.com/e-sign



The screenshot shows the login interface for the gymassistant e-Signature Kiosk. At the top is the gymassistant logo. Below it is the title "e-Signature Kiosk Login". There are two input fields: "ClubID:" followed by a text box containing the number "0", and "Password:" followed by a text box. To the right of the password box is a "Login" button.

Enter your **ClubID** and the **Password** that was set above in the **Portal Settings**.

The document that you uploaded for eSignature will appear on the page automatically. If it does not appear then click the **Refresh** link.



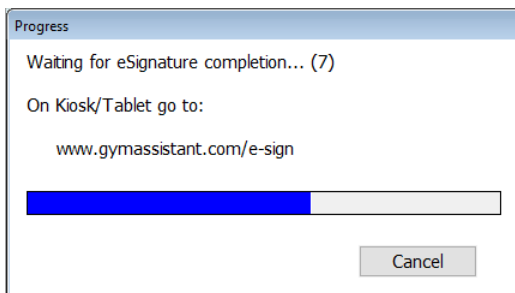
The screenshot shows the gymassistant e-Signature Kiosk page after login. It features the gymassistant logo and the title "e-Signature Kiosk". Below the title is a document link: "#8 Happy Gilmore - Contract". Underneath the link are two buttons: "Refresh" and "Logout".

Click on the document link (member #, member name, and document name) to view and sign.

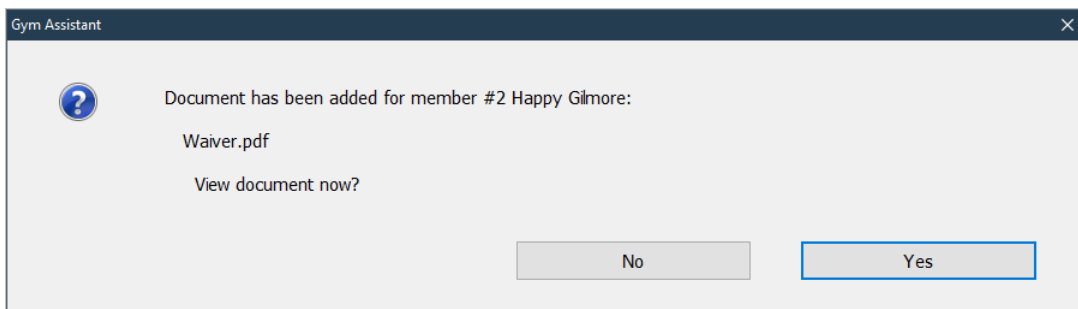
The screenshot shows the Gym Assistant web interface. At the top left is the logo "gymassistant™". Below it is a disclaimer: "building or abroad. This includes but is not limited to parks, recreational areas, playgrounds, areas adjacent to main building, and/or any area selected for training by THE GYM." Below the disclaimer is a paragraph: "I have read and understood the foregoing assumption of risk, and release of liability and I understand that by signing it obligates me to indemnify the parties named for any liability for injury or death of any person and damage to property caused by my negligent or intentional act or omission. I understand that by signing this form I am waiving valuable legal rights." Below this is the text "Signature:" and "Date: 09/28/2020 11:45P". A dashed box contains a handwritten signature. Below the signature box is a "Clear Signature" button and a "Submit" button. A mouse cursor is pointing at the "Submit" button.

Scroll down to the bottom of the document, sign in the signature box, then click **Submit**.

Gym Assistant will wait for the member to sign the document.



As soon as the member clicks the Submit button on the page Gym Assistant will automatically import the signed document into the member's record.



The signed document is also automatically emailed to the member.

If you do not want to wait for the member to sign the document you will be able to download the signed document at a later time.

