Gym Assistant eSignatures

November 22, 2021

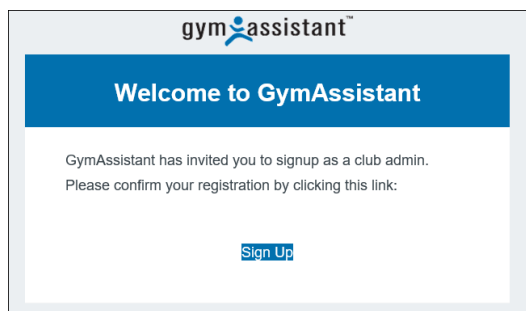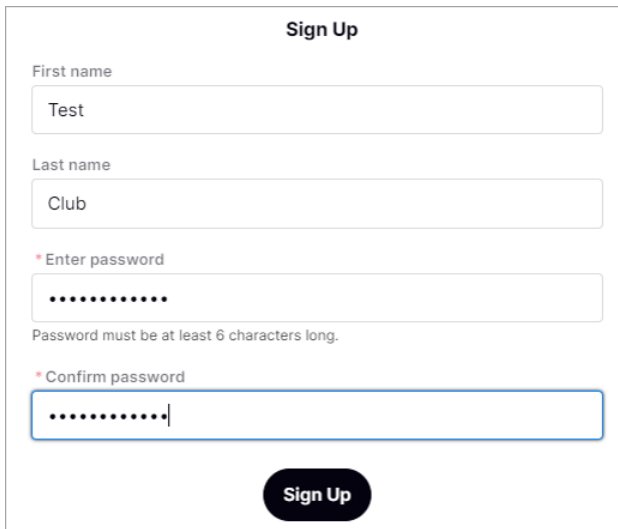## Contents

Introduction

Gym Assistant eSignatures require setup on the **Online Member Portal**. Please contact Gym Assistant Support to activate your Member Portal account.

Member Portal Admin Registration

You will receive an email with the subject "Invitation to Gym Assistant".
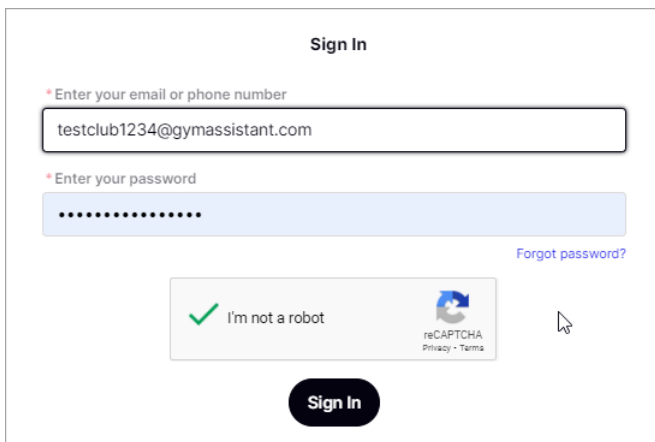

Click the **Sign Up** link.

Enter a first name, last name and a password. Then click **Sign Up**.

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

You can then login to the Member Portal any time at:

http://www.portal.gymassistant.com

For eSignatures you should not need to go to the Member Portal in the future, as all functions are triggered from within Gym Assistant.

Initial Setup

Once logged into the Portal click the **Edit** link to setup your Club Info.

Note: For eSignatures you should ignore the top and bottom sections. They will have no effect for eSignatures.

Notifications/Updates

In **Email On Updates** enter one or more email addresses that will receive notification when a member eSigns a document. If entering more than one email put each on a separate line.

In **SMS On Updates** enter one or more mobile phone numbers that will receive notification when a member eSigns a document. If entering more than one number put each on a separate line.
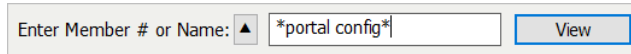
Turn eSignatures notifications On/Off for SMS/Email.

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.
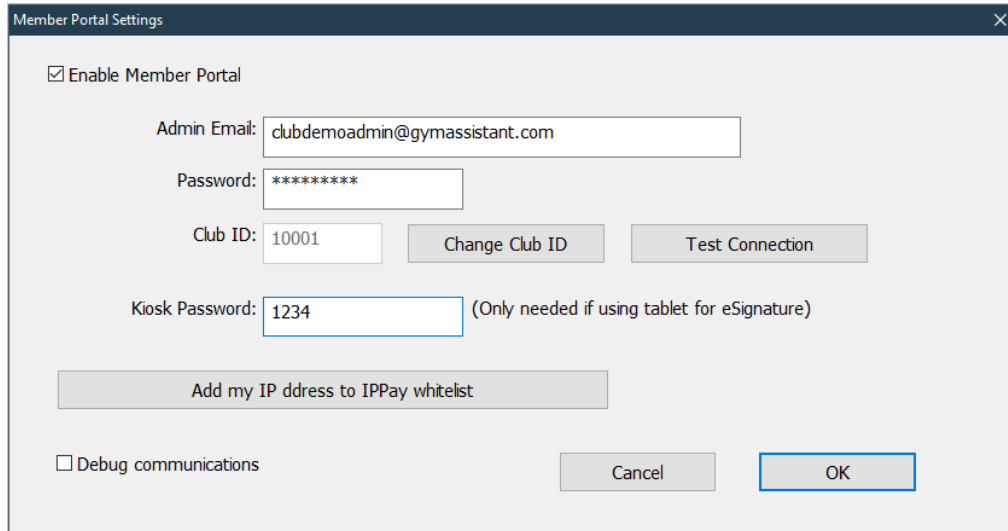
Enable the Member Portal

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: clubdemoadmin@gymassistant.com

Password: *********

Club ID: 10001   Change Club ID   Test Connection

Kiosk Password: 1234   (Only needed if using tablet for eSignature)

Add my IP ddress to IPPay whitelist

☐ Debug communications   Cancel   OK

Check the **Enable Member Portal** checkbox.

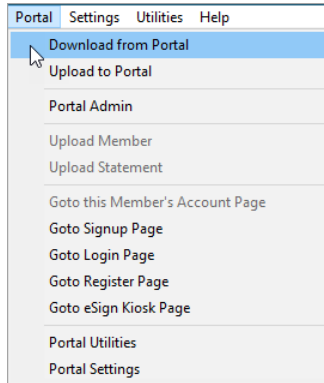Enter the **Email** and **Password** that you used to setup your portal account.

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

Enter a **Kiosk Password** if you are planning to allow members to eSign documents using a tablet at the front desk.

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

Portal Menu

Gym Assistant will now have a Portal menu.

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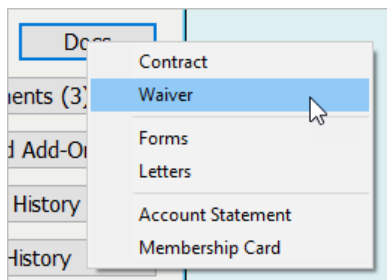
Select **Contract**, **Waiver**, **Forms** or **Letters**.

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

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

Select the method you want for eSignature.
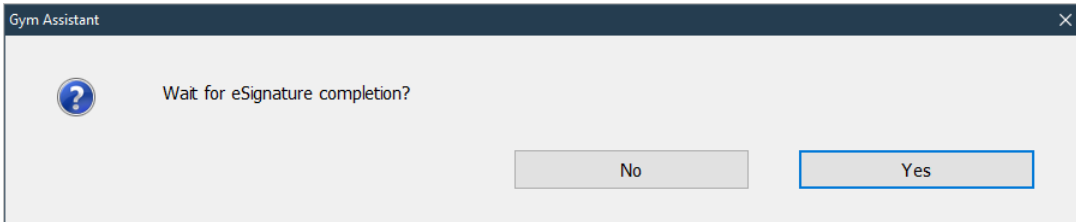

- SMS – a text will be sent to the member with a link to click
- Email – an email will be sent to the member with a link to click
- Kiosk – the document will appear on a tablet or laptop that you hand to the member
- Browser – the document will appear in a browser window

If you select SMS or Email then you then be asked if you wan 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.
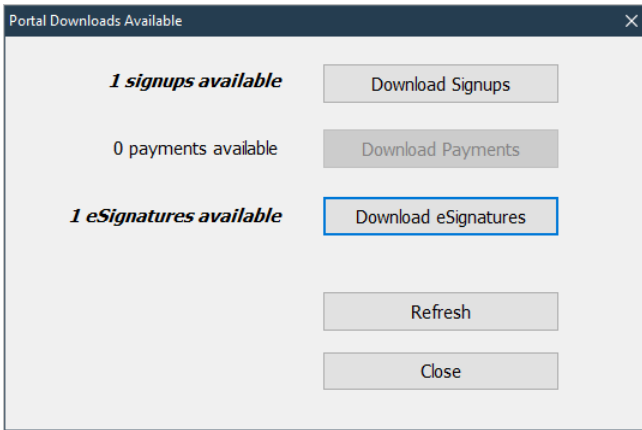
Click **Download eSignatures**.
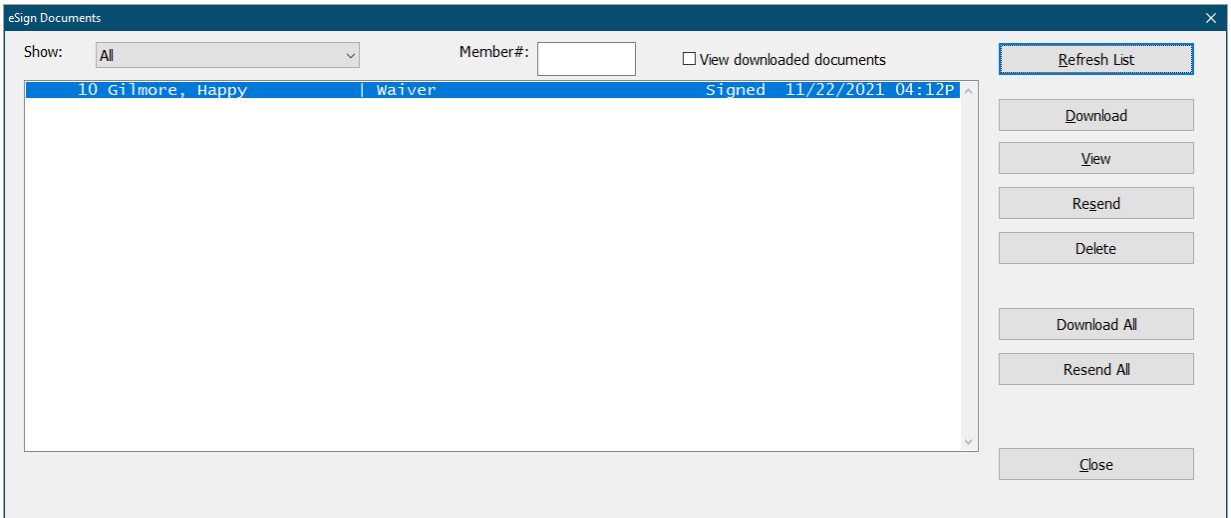
To download a signed document, click **Download** or **Download All**.

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

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

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.

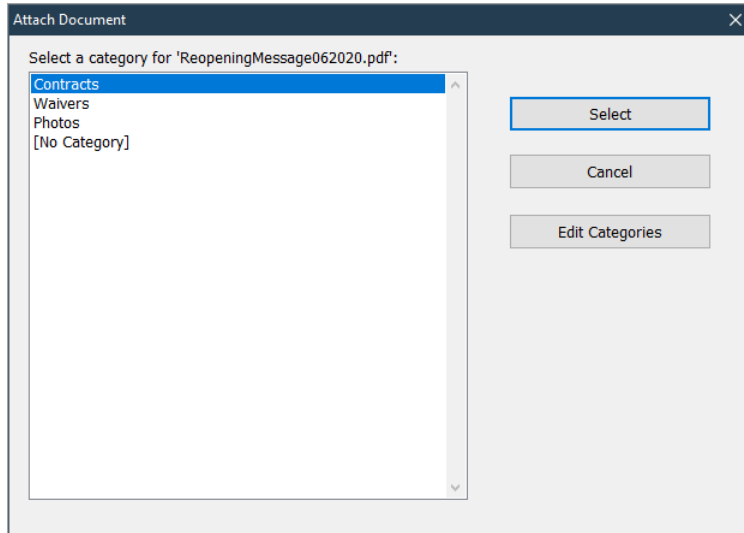If Gym Assistant cannot determine the category then you will be asked to assign the document to a category.

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:
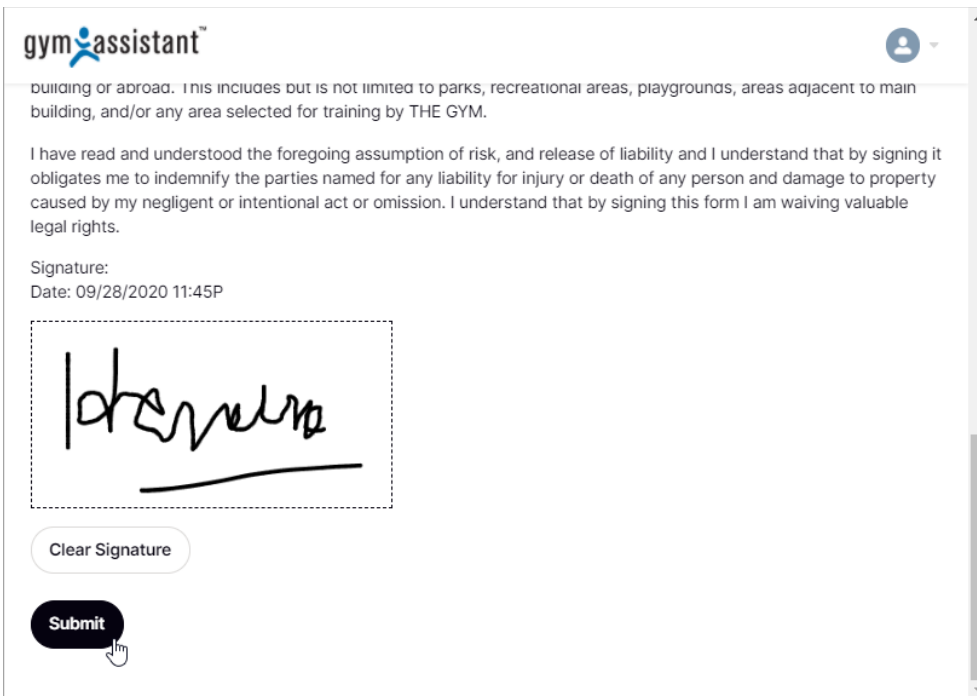
www.gymassistant.com/e-sign

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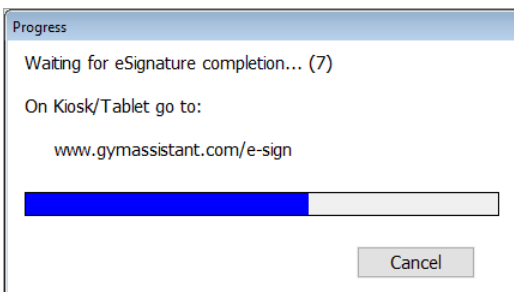
Click on the document link (member #, member name, and document name) to view and sign.
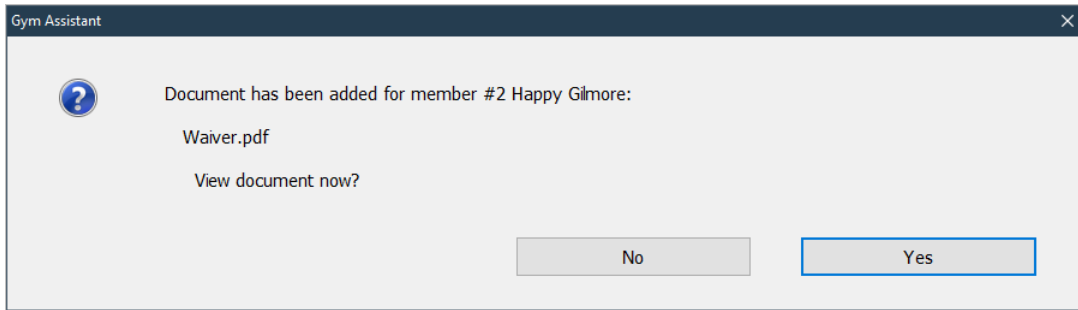

Scroll down to the bottom of the document, sign in the signature box, then click **Submit**.

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.

Gym Assistant   ✕

? Document has been added for member #2 Happy Gilmore:

Waiver.pdf

View document now?

No   Yes

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.