



QUOOX

GETTING STARTED WITH THE
QUOOX® GYM MANAGEMENT SOLUTION

14 May 2020

Introduction

It is very tempting to bash in a few details and start using Quoox right away - and you could. However, spending time now to plan how you wish to setup your system and use it will make it much easier for you to leverage the system in the way that works best for your business.

Your account manager will walk you through set up, please allow 2-3 hours for this, but you will need to read this document first.

Initial considerations

- Your Stripe account (see section 3)
- Your GoCardless Account (see section 4)
- When you have reached the point of adding your members to the system, make your members aware of new email address and text number so you can immediately start receiving all incoming messages straight into Quoox and deal with them accordingly.

Items you need to consider and collate:

- How your logo will appear
- Some photos of your fitness centre(s)
- Some photos of your sessions/classes
- Photos of each of the products you wish to sell via the point-of-sale system (optional)
- Your company registration number; tax number; and GDPR (privacy) email address (if/as applicable)
- How you would describe your facilities and sessions to your members
- How you wish you structure your
 - credits
 - memberships
 - sessions
 - and session schedules

As with all new systems there will be a period of learning.

*We are here to help so please **reach out** if you find yourself stuck, frustrated, or confused!*

In the dashboard if you go to **Quoox Account** and click on **Help Guide**, you will be taken to our step by step features how to guide, also available here: <https://support.quoox.com/>

Every feature of Quoox is explained within the support website.

There is also a step by step initial set up guide here:

<https://support.quoox.com/knowledgebase/setting-up-your-quoox-system/>

We have provided a description of each step requirement. Please delete these descriptions and then provide the info next to the requirement.

If you require help, please do not hesitate to ask. You can raise a support ticket from the "Support Tickets" function within the "Quoox Account" section of the main menu.

1. Logo

- provide your logo in a decent quality (1000px x 1000px)
- provide it as a png image with a transparent background. If you are not sure what this is or how to get it, please ask us and we will happily help you format your logo
- stroke the outline of your logo with a thin strip of colour, to define it if it is placed on an area of the same colour

Once you have uploaded your logo our support team may make manual tweaks to it to help ensure you get the best appearance in different situations.



2. Settings

Business Details

- **GDPR Address** – The email address to which any queries surrounding GDPR (privacy) compliance should be sent. These details are included in outgoing emails to ensure GDPR and privacy compliance.
- **Default (sales) tax %**

Default Session Settings

- **Inactivity period (days)** – The number of days after which a member (without membership and having not attended a session) should be considered 'inactive'.
- **Drop-off period (days)** – The number of days to use as default on the dashboard "Possible member drop-off" widget.
- **Weeks of sessions to timetable** – The number of weeks to sessions to make available in advance, pre-generated for members to book. We suggest **not** creating sessions more than 4 weeks (or so) in advance.
- **Allow bookings until x hours before start** – *Optionally* prevent online bookings within x hours of the start of a session. Setting this value to 0 will allow bookings right up until the start of the session.
- **Waitlist enabled** – Whether to enable wait-listing options for bookings.
- **Default wait list capacity** – The default waitlist capacity to apply to sessions. These may be overridden at session-level.
- **Late cancellations are within x minutes of session** – Consider any booking within x minutes of a session to be considered a *late cancellation*. Late cancellations are not automatically refunded by the system, and credits/payment is lost by the member. Set this to 0, if you want all cancellations (prior to the session) to be refunded automatically.

Strike Rules

Based upon the member's calculated *reliability metric*, you may auto-apply a strike rule to block members from booking sessions.

The strike rule is applied at the point at which the member drops below the acceptable threshold.

- **Show reliability in app when below (%)** – The percentage below which the reliability should be shown to the member in the mobile app.
- **Automatic blocking enabled** – Whether to apply the strike rule automatically.

- **Send the member a notification** – Sets whether, when the member is blocked, they should be sent an automated notification.
- **Block when member reliability drops below** – The threshold below which the strike rule should be applied.
We strongly suggest monitoring the reliability values generated for your members before configuring a strike rule. Immediately imposing a new attendance rule to existing members can cause you some friction.
- **Number of days to block** – From the point of the strike rule being triggered, the number of delays to block the member from booking using the mobile app or the web portal. **Note:** Staff may still manually book the member onto a session, even if a strike rule is in-force.

Working Day

- **Work day start/finish times** – The *typical* open/close times for your business in the format hh:mm

Units

- **Measurement units** – Centimetres or Inches
- **Weight units** – Kilograms or Pounds

Timesheets and Payrolls

- **Staff may clock-in x minutes before shift** – The number of minutes *prior to a shift* in which you'll allow a staff member to clock-in. A good value for this would be 10-15 minutes.
- **Late start grace period (minutes)** – Employees arriving this many minutes *after the scheduled shift start* will be flagged in the timesheet functions for review.
- **Early finish grace period (minutes)** – Employees leaving this many minutes *before the scheduled shift end* will be flagged in the timesheet functions for review.
- **Approve shifts exceeding x hours** – Shifts that exceed this number of hours are flagged for verification and approval in the timesheet and payroll functions.
- Note: A shift is deemed finished in the event that 24-hours has passed after clocking-in, without the employee having clocked-out.

Store

- **Member store tabs permitted/not**

Documents

- **Member file uploads permitted** - When enabled, members are permitted to upload photographs to their account via the Quoox mobile app, and the member portal. Whilst enabled system-wide, members may be *blocked* from using this function on a per-member basis within their profile details.

Access Control

- You can ignore this, unless you have scan entry system.

3. Stripe Integration

IMPORTANT: Quoox MUST have its own Stripe account. Do NOT connect Stripe to any existing Stripe account, as this may cause you problems. Stripe make it easy to create additional accounts, if necessary.

Whilst we can input the required codes for you, we strongly advise you follow these simple steps and input the codes yourself. This ensures that you only you have access to your payment account.

Quoox requires your Stripe API Key. You get this by logging into your Stripe account and following these instructions.

- From the menu, select **Developers** and **API Keys**.
- Locate the **publishable key** and the **secret key**. You may need to click a **Reveal live key token** button to display the secret key.
- Copy the two keys, one-at-a-time, into the corresponding fields in the **Stripe** section of the Quoox Integration page, found by selecting:
- **Settings** heading on the main Quoox menu.
- Then the **Integrations** heading on the main Quoox menu.
- Click **Save** Within *approximately* 5-minutes you will find that you can start to take debit/credit card payments via the Quoox system.

Full details of this process are here:

<https://support.quoox.com/knowledgebase/taking-debit-credit-card-payments-with-stripe/>



4. GoCardless Integration

- Access the Quoox Integration settings, found by selecting **Integrations** from the **Settings** main menu.
- Scroll to find the GoCardless section.
- Click the large **Connect to GoCardless** button.
- If you do not have a GoCardless account, sign-up by completing the registration form that will be displayed. Some information will already be pre-filled for you, but you can amend this as you wish.
- If you do *already* have a GoCardless account, simply click **Sign In** at the bottom of the form where it says "Already have a GoCardless account?"
- Provide your login details for your existing GoCardless account.
- Once your account has been created, there will be a few steps that you need to take to verify your account and link your bank account.
- GoCardless will provide you simple instructions, which you should follow.
- Quoox will display the current status of a member's Direct Debit mandate on the **Activity & Transactions** tab of their user record.

Full details of this process are here:

<https://support.quoox.com/knowledgebase/take-direct-debit-payments-with-gocardless/>

Further integrations

Step by step guide for further integrations can be found below:

MailChimp: <https://support.quoox.com/knowledgebase/easy-marketing-campaigns-with-mailchimp/>

Xero Integration: <https://support.quoox.com/knowledgebase/simplify-your-accounting-with-xero/>

Active Campaign: <https://support.quoox.com/knowledgebase/in-depth-marketing-with-activecampaign/>

5. Setting Up Your Venue

Venue Details

- Provide a logical, recognisable name for the venue. This might, for example, be the name of the location (E.g. Battlesbridge)
- Full address information, and provide a contact name; number and email.
- Description of the venue and the facilities it has. This is displayed to your members, along with the other information, in the mobile app and member portal. This information could be useful in alerting members to other venues, where they might have friends they can refer.
- Provide helpful information regarding how to find your venue, by car and on foot.
- Add any extra information that you think might be useful to members attending this venue location.
- Finally, **and this is important**, locate your venue on the map. This can be done by using your postcode/zipcode, and then clicking on the map to refine the location.
- This above latitude/longitude geo-location is used to help provide your members automated directions (via Google Maps), but also to correctly determine when your employees are on-site (for clocking-in/out purposes).
- Make sure this is correct!

Venue Opening Times

- Give us your hours of operation or alternatively:
- Clicking the **Opening Times** tab on the venue will enable you to set the times during the week that the venue is open.

Venue Areas

- Details of different areas of your facility (It may be that there is only one area, but this still needs to be defined).
- Capacity details

Venue Photographs

Within the **Photos** tab of the venue setup, you can add one or more photographs of your venue. You can provide us with your photos or alternatively we suggest uploading your own as you may wish to regularly change these.

These photographs are shown to members in the Quoox Mobile App, and the member portal.

Additionally, a photo is randomly chosen as the background to your [self-service check-in kiosk](#).

- To upload a photo, select the JPG or PNG image that you wish to upload. The Quoox system will resize the image for you.
- **TIP:** The image caption is derived from the filename. So, if you call your file `Free Weights.jpg`, the caption "Free Weights" will be applied.
- You can delete a given image by rolling your mouse over the image and selecting the trash icon.



6. Email and App Layout Options

Your uploaded logo will be used to brand your emails.

You can personalise the template with our choice of colours by:

- Go to **Branding**
- Select **Layout Options**
- Choose your link colour, primary colour and secondary colour
- To view an example of your template click View Example

Full details of this process are here:

<https://support.quoox.com/knowledgebase/can-i-configure-emails-sent-to-my-members/>

7. Lists & Groups

The lists you can configure are found in:

- **Settings**
- **Lists and Groups**

You can send us any details you wish to add or simply:

- click on the pencil icon
- This will display the current entries for that list or group
- Click the pencil icon to edit or:
- Click **ADD+** to add a new entry
- When you have finished click **Save**

Full details of this process are found here:

<https://support.quoox.com/knowledgebase/how-do-i-edit-lists-and-setup-member-groups/>

8. Set Up Reminder Schemes for Your Sessions

With Quoox, you can configure multiple *RoboNudge* reminder schemes, comprising as many different reminders as you wish. It's totally up to you how you configure your system.

We recommend that you typically send members a reminder a day-or-so before a booked session. This will increase the chances of the member remembering to attend, as well as reduce late cancellations. Furthermore, it establishes a good communications strategy with your members.

To access this:

- Go to **Settings**
- Select **RoboNudge**

We require:

- **Title** – a name by which the scheme can be recognised (E.g. Basic single reminder)
- Click **Add Alert**
- **Trigger time** – the point in time *prior to the event* that the alert will be sent.
Note: Quoox will apply smart-send timing to these alerts, avoiding sending messages in anti-social hours
- **Reminder method** – The method by which you wish to send the alert. Email, SMS and/or both.
- **SMS Message content** – If you selected SMS as the reminder method, this is the message that shall be sent.
- **Email subject** – If you selected email as the reminder method, this is the reminder email subject line
- **Email message content** – If you selected email content as the reminder method, this is the reminder email body content

Full details of this process are found here:

<https://support.quoox.com/knowledgebase/can-i-setup-session-reminder-emails-texts/>



9. Define Your Sessions/Classes/Courses/Pop Ups

These are the basic definitions of each session/course/popup type (if doing this yourself you may want to visit section 8 Setting Up Your Credit Packs, in order to restrict certain membership access.

To find this:

- Go to **Settings**
- Select **Sessions/Classes**

To define your session/class we require:

- **Name** – What is the class called? This should be a name that makes sense to your members, as they will use this to identify the class
- **Description** – Provide a good description of the class. This will be displayed to members, and could encourage them to attend
- **Photograph** – Whilst *optional*, we recommend uploading a photograph of the session. This helps encourage attendance
- **Class type** – Indicate the type of class this is, from:
 - **Session** – A regular session/class
 - **Course** – A longer, less regularly occurring course (typically 1 day or more)
 - **Pop up** – An ad-hoc event, such as a social event
 - **Consultation** – An ad-hoc event, such as an on-boarding meeting; sports massage; rehabilitation session etc.
- **Class level** – Indicate the level of the class. This is an arbitrary metric that you can configure through [lists and groups](#)
- **Duration** – Provide the length of the standard class in days, hours and minutes
This is a default value, which you can further tailor both through the scheduling step and on an ad-hoc basis
- **Cost** – What is the cost (in credits) for members. Typically, this would be 1 credit
- **Purchase cost** – What is the cost (in your currency) for pay-as-you-go members
- **Tax included** – What percentage tax is *included* within the purchase cost (E.g. 20%)
- **Allow pay-as-you-go customers** – Whether pay-as-you-go customers are permitted
- **Allow non-members** – Whether non-members are permitted to attend
- **Valid memberships** – Which membership types are valid for use in booking this session?
- **Session/class categories** – Which category/categories apply to this session?
- **Automated reminders** – You can *optionally* apply an automated reminder scheme to the session

Full details of this process are here:

<https://support.quoox.com/knowledgebase/creating-and-scheduling-sessions-classes/>

10. Set Up Your Session/Class Schedule

Having defined your session(s), we now setup the schedule for when they occur. If you want to look at this click on the **Schedule** tab which will appear once the session has been saved.

RE-CAP: You have defined your session/class (E.g. Boxing). Now you are creating the schedule(s) for when it occurs.

We suggest you spend a few minutes reviewing your schedule and identifying the patterns to help you effectively setup your class schedule. If you require help with this, please just ask and we will be happy to provide our suggestions.

We require:

- **Name** – Provide a name for the schedule. This is to help you recognise it. (E.g. Monday, 9am)
- **Venue** – Select the venue at which the session occurs
- **Area** – Select the training area within the venue in which the session occurs
This will default to the area capacity, which you can then adjust
- **Capacity** – The maximum number of bookings you can take for this session
- **Schedule** – The schedule options, *see below*
- **First occurrence** – On what date should this session first be scheduled
- **Start time** – What is the start time for the session
- **Duration** – Defaulted from the session definition, you can adjust the duration for a specific schedule
- **Allow pay-as-you-go customers** – Defaulted from the session definition, but you can adjust the selection for a specific schedule
- **Allow non-members** – Defaulted from the session definition, but you can adjust the selection for a specific schedule
- **Is Private** – If marked as “private” the session only appears in the listing of those members booked onto it
- **Credit cost per eligible member** – The credit cost for members booking the session
Defaulted from the session definition, you can adjust this for a given session schedule (E.g. peak times)
- **Purchase cost** – The pay-as-you-go cost.
Defaulted from the session definition, you can adjust this for a given session schedule (E.g. peak times)
- **Tax included** – The percentage tax *included* in the purchase cost

Full details can be found here:

<https://support.quoox.com/knowledgebase/creating-and-scheduling-sessions-classes/#editschedule>

BEFORE YOU MOVE TO STEP 11, READ THE FOLLOWING:

Memberships and Credit Packs

Quoox uses terminology that may be different to what you may be used to.

- A credit is used to book a session.
- A credit pack is a collection of credits valid for one or more type of session.
- You can give several different credit packs to a membership.
- Credit packs are given to memberships on a recurring basis, ie monthly.
- A membership may run for a fixed period of time, eg 12 months, or be auto-renewing.

For example:

Monthly Membership 4

- a credit pack of 4 small group sessions
- a credit pack of 10 large group sessions
- credits are issued monthly

Membership Plan

Overview – overall description

Payment Plan – how you will charge for this membership, ie weekly, monthly, annually, etc.

Quoox separates credits and membership payment plans because, while many centres operate with credits being allocated at the same time as payment, by separating them you could, for example, issue credits on a monthly basis – but take payment on a quarterly basis.

Deliverables – what each membership consists of, ie 4 x small group sessions and 10 x large group sessions (using our example above, the membership would have two credit packs allocated every month).

11. Setting Up Your Credit Packs

These are the credits issued to members for their membership, or that may be bought on an ad-hoc basis (i.e. pay as you go).

Required:

- **Name** – a *meaningful* name for the credit pack (E.g. 12-session pack)
- **Credits issued** – the number of credits to include in this credit pack
- **Purchase cost** – if purchased on an *ad-hoc* basis (i.e. not part of a membership), the cost of the credits
- **Tax included** – the percentage tax included, if purchased on an *ad-hoc* basis
- **When do the credits become valid?** – Immediate; First use, etc
- **How long are they valid for?** – A fixed period; Until the end of the month; No expiry
- **If fixed period, specify the duration** – the duration for which the credits are valid, if “a fixed period” was selected above e.g. 21 days.
- **Which sessions are these credits valid for** – Either “valid for any session”, or a selection of sessions
- **Which venues are these credits valid for** – Either “valid for any venue”, or a selection of venues
- **Is Private** – whether the credit pack is available for purchase by members, ie if they wanted to top up.

To find Credit Packs:

- Go to **Settings**
- Select **Credit Packs**

Full details of this process are found here:

<https://support.quoox.com/knowledgebase/setting-up-credits-credit-packs/>

12. Configure Your Memberships

Membership essentially allocates a number of credits to a member, which they may then use for bookings to attend a session/class.

You can have as many types of membership as you want.

- Go to **Settings**
- Select **Membership Plans**

Add/Edit a Membership

Please provide the following:

Overview

- **Name** – What should the membership package be known as (E.g. Standard Membership)
- **Description** – How would you describe this membership to your customers? This should be written as member-friendly text
- **What type of membership is this?** – Presently, *Membership* is the only option
- **When does this membership commence?** – Choose from:
 - Immediate – The membership starts immediately
 - Date of first booking – The membership becomes active upon the first booking
 - 1st of next month – The membership becomes active on the first day of the next month
- **Provides unlimited session access** – This membership allows *any* session to be booked
- **Is limited to one per member** – A member may be allocated this membership only once
- **Is a trial membership** – Indicates that the membership is a trial plan. This is for recording purposes only
- **Is private** – The membership type is hidden from any member-facing lists
- **Credits** – The [credit pack\(s\)](#) that are issued on a recurring basis with this membership
You may add one or more credit packs, and a multiple of one or more of each.

Full details of this process are found here:

<https://support.quoox.com/knowledgebase/membership-plans-and-payment-schedules/>

N.B. If you already have payment subscriptions in place, ie with Gocardless, please ensure these are cancelled before you set up Quoox to collect payment through Gocardless or Stripe. If you do not do this your members may be charged twice – through the pre-existing subscription and the new subscription.

13. Add/Edit Membership Payment Plans

You may have one membership payment option, or multiple options.

Once you have defined a membership (in Add/Edit Membership), you can access the **Membership Plans** tab. Listed here are the different types of payment plan associated with the membership.

To create your options, we require:

- **Name** – A name to enable you to easily identify the plan (E.g. Monthly Payment Plan)
- **Description** – A meaningful (and “member-friendly”) description for the plan
- **Subscription Issue Period**

This is the recurring period upon which the *credits are issued*

- **Period length** – The multiple of the period
- **Period** – Days; Weeks; Months
 - A period length of “1”, with a period of “months” would mean that credits are issued every 1 month (I.e. monthly)
 - A period length of “2”, with a period of “weeks” would mean that credits are issued every 2-weeks
- **Times repeated** – The minimum length of the membership
 - E.g. “12” with a period length of “1” and a period of “monthly” would result in 12, monthly credit issues
- **Joining Fee** – If there is a one-off joining fee for the membership, this can be specified
- **Tax in Joining Fee** – The percentage tax *included* in the joining fee (E.g 20%)
- **Recurring Fee** – The sum of the recurring membership fee, charged as per the schedule
- **Tax in Recurring Fee** – The percentage tax *included* in the recurring fee (E.g 20%)
- **Payment schedule** – The recurring payment schedule.
- **Auto-renew at expiry** – Whether the membership should auto-renew once it reaches its “times repeated” value
- **Is private** – When checked, this hides the payment plan from anywhere visible to members

Quoox features a comprehensive payment scheduling feature that allows for a wide variety of (potentially complex) schedule patterns. For facilities with multiple options we would strongly advise you to visit the link below and review the payment schedule options.

Full details of this process are found here:

<https://support.quoox.com/knowledgebase/membership-plans-and-payment-schedules/#membershipplan>



14. Member Achievements

By defining member achievements, you can then record these against your member records.

To find this:

- Go to **Settings**
- Select **Achievements**

For each achievement category, provide:

- **Name** – the name of the achievement category (E.g. Deadlift)
- **Unit** – the unit for the category. Time; Kg; Lbs; Metres; Inches
- **Best** – indicate whether a higher or lower value of the unit is considered better
E.g. for a deadlift, with a unit of kg, a higher value would be considered better
E.g. for a 100m dash, with a unit of time, a lower value would be considered better

If you are adding belt gradings:

- Select Add Achievements
- Input belt colour
- Select Unit – Score
- Select Best – Highest is best.

Full details of this process can be found here:

<https://support.quoox.com/knowledgebase/setup-member-achievement-categories/>



15. Review System Templates

Quoox sends your members/employees a number of automated notifications as part of its' processes. Whilst the system comes with good, pre-written templates, you may change these to suit your personal preferences and styles.

You can also include any further information you wish.

One template you may wish to review is the "Welcome" template sent to new members. This is sent when you add a new member to the Quoox system and will be the first indication that members receive that they have been setup on the system.

To find this:

- Go to **Settings**
- Select **System Templates**

A list of system templates will be displayed.

To edit any of the templates, click on the pencil icon.

Full details of this process can be found here:

<https://support.quoox.com/knowledgebase/editing-the-emails-your-members-are-sent/>

16. Set Up Store

As with all the Quoox configuration, this can be edited at any time. It is here that you setup the products you sell in your point-of-sale system.

To find:

- Go to **Settings**
- Select **Inventory**

We require:

- **Title** – The name of the item (E.g. Logo t-shirt)
- **Description** – A description of the item, as displayed in the item detail view
- **Supplier** – *Optionally* record the supplier from who you get this item
- **Supplier Part #** – *Optionally* record the part number for the item with your supplier
- **Status** – The product status. Available; Temporarily Unavailable; Discontinued
- **Promotion** – Any promotional flags that you wish to apply to the product. E.g. Limited Availability
- **Tax** – The percentage tax *included* in the sale price
- **Allow to be sold, even when stock is depleted to zero** – When checked, an employee is still able to sell this product, even though you (theoretically) do not have any stock. This may be useful in the event of pre-sales pending arrival of stock.
- **Upload Photograph** – Provide a photograph of the item, for easy recognition in the POS system. The image will be resized by Quoox

Pricing and Stock Variation

We require:

- **Variant name** – a *meaningful* name for the variant (E.g. 2XL)
- **In stock** – the current stock held for this variant
- **Sale price** – the price at which the product should be sold (including tax)
- **Purchase price** – the price at which the product was purchased (including tax)

The margin is automatically calculated to help guide you as to whether your sales price is decent vs your purchase price.

Full details of this can be found here:

<https://support.quoox.com/knowledgebase/setting-up-the-store-inventory/>



17. Add Employees

Employees are added as members, and then *promoted* to be an employee (or a manager) in their profile.

To find:

- Go to **Manage**
- Select **Employees**

For each staff member, the information displayed includes:

- **Profile picture**
- **Name**
- **Job Title**
- **Email address** – clicking on the icon will copy this to the clipboard
- **Mobile number** – clicking on the icon will copy this to the clipboard
- **Employee Type** – employee; or manager
- **Last Login** – the last date/time at which the employee logged into the system

Whilst we are happy to do this for you, this is an area you will want to be familiar with to ensure your staff are using your new system.

Full details of this can be found here:

<https://support.quoox.com/knowledgebase/adding-and-listing-employees/>

18. Employee Shift Patterns

By adding your shift patterns, your employees can see when they are due to attend your centre. They can also clock-in/out via the mobile app.

To find:

- Go to **Manage**
- Select **Shift Manager**
- In the Shift Manager window, sessions and employee shifts are displayed side-by-side for easy visual correlation.
- You can use the *Venue*, and *Role* drop-downs to refine the employees and sessions displayed in the schedule view.
- By checking/un-checking *Show Sessions* and *Show Holidays* you can also opt whether to include sessions and holidays in the schedule view at all. Click the **Filter** button to apply your filter criteria.
- Open/unallocated shifts, and sessions that are yet to be assigned a trainer are displayed in the **Open/Unallocated** row. This is essentially your *problem row*, and where you likely need to focus most of your attention. This why it is highlighted in **red**.

For each shift, provide:

- **Date** – You can select the desired date by clicking on the icon.
- **Times** – The start and end time for the shift. Most time formats a supported (E.g. 9:00 – 17:30)
- **Break** – *Optionally*, enter a time in minutes for the duration of the break included in this shift
- **Venue** – Select the venue for which the shift exists.
- **Role** – Select the role type for the shift. Roles can be setup in **7. Lists & Groups**.
- **Employee** – Once you have selected a venue and role, suitable employees will be displayed. Select an employee if you wish to assign one or leave this blank if this is yet to determined.
- **Notes** – Add any optional notes regarding this shift. These notes *will be visible to the employee*.

Clicking **Save As Draft** will save the shift as “unpublished”. Any assigned employees will *not* be notified.

Clicking **Publish** will save the shift as “published”. Any assigned employees *will* be notified, and it will appear in the shift listing in the Quoox mobile app.

Cloning shifts for repeating shift patterns

Cloning shifts is an easy way to create a repeating pattern of shifts, rather than you needing to repeatedly add shifts week-on-week.

As most centres operate on a pattern, this greatly reduces the time overheads, and allows you to concentrate on the *exceptions*, rather than the norm.

- To clone shifts, click the **Clone Shifts** button

Then enter:

- **Source Range** – The date range that you wish to use as the template to copy.
E.g. If you have a repeating 2-week shift pattern, setup the first 2-weeks, and select those 2-weeks as being the source
- **Target Range** – The date range across which you wish to copy the source shifts.
This target range can be any multiple of the source range but *must not* overlap the source range (don't cross the streams!)
- **Venues to Clone** – Select the venues that you wish to clone. By default, this is all venues.
- **Employees to Clone** – Select the employees to clone. By default, this is all employees.
- **Clash management** – Choose how you wish shift conflicts to be dealt with
 - **Overwrite clashing shifts** – Shifts that conflict will be deleted and replaced
 - **Move clashes to open shifts** – Copied shifts that clash with existing shifts will be moved to *unassigned/open*
 - **Don't copy shifts that clash** – Shifts that overlap existing shifts will not be copied

Full details can be found here:

<https://support.quoox.com/knowledgebase/scheduling-shifts-and-rota-management/>



19. Assign Staff to Sessions (optional)

This lets employees know which sessions they're running, and members who their class leader is going to be.

Within **Shift Manager** click on the session which will open the assignment screen.

Full details can be found here:

<https://support.quoox.com/knowledgebase/scheduling-shifts-and-rota-management/#allocatemember>



20. Adding Your Members

This will trigger the sending of a “welcome” email to your members, and they will have access to the system.

To find:

- Go to **Manage**
- Select **Members**

For each member we require:

- First name
- Last name
- Preferred email
- Preferred mobile #

Further details your member can input in their app, or you can add for them.

Full details can be found here:

<https://support.quoox.com/knowledgebase/adding-and-listing-members/>