

# Zen Hacks

Our favorite tips and tricks to help you get the most from our software.

*Written by our support and onboarding experts.*





## COLE

**My top hack is the ability to give a client access to Member Connect with one-click:**

If a client hasn't logged into their Member Connect account yet, there is a quick and easy way to send them the temporary password email. When you are on a client's profile page, look to the top left, near where the picture icon is. Immediately to the right of the picture icon there are two small icons; the first is a credit card and the second is a lightning bolt. The credit card icon will allow you to add in a payment account. When you click the lightning bolt icon, you can choose to give the member access to the Member Connect website and they will immediately be sent a temporary password.

**I also like the shortcuts in the Power Search bar:**

Click into the Power Search box in the top left of your database to utilize a number of shortcuts and commands in the database, from easily creating a New Report, to going directly to a person's profile page, and adding a new person to the database.

## THERESA

A great hack is the “Edit Report Settings” feature:

Use this feature in the top right corner of any report to customize how your report displays. You can choose to group items, place them in chart form, show only the totals and also choose what criteria actually displays by checking or unchecking the items at the bottom! This makes your report easy on the eyes.



## NATE



### Our Custom Fields/Lookup Codes are great:

It's your database, so set it up in a way that works for you with our customization tools. If you go to Setup, under the Database Tools section there are two options that make your database more "you"- Custom Fields and Lookup Codes.

Custom Codes allow you to add custom entry fields throughout your database. For example, you may want to add a custom field for "Client Goals" that you can update using the Adding a Person Wizard and edit through their profile in your Studio Account.

Lookup Codes allow you to edit drop-down option items throughout your database. For instance, you may want to edit the "Prospect Status" labels to reflect your own sales process.

## LAYNE

**My hack is handy for those who utilize our task feature:**

If you go to:

*Dashboard > My Account > Change Task Notifications >*

You can update when you would like to receive emails about your pending task list. This can be changed to daily emails, weekly emails (that come in on Sunday morning), or you can completely opt out of task emails.





## KELSEY

**My favorite hack is our System Reports – especially 'Audit Duplicate People':**

It's like spellcheck for your whole database in that it catches the mistakes (duplicates, errors, etc) that are easiest to overlook. Whenever I show a customer these reports, the reaction is "OH MY GOSH, LOOK AT THIS!" because they've been trying to track down this information just by clicking through their members. Here, it's all laid out.

From the dashboard, click:

*System Reports (under Saved Reports) >  
Audit Duplicate People.*

## DEREK

The “Use Multiple Schedules” function is often overlooked but really handy:

When setting up classes, by utilizing the “Use Multiple Schedules” button, you are able to set up all of your schedules for a given class, within one class setup. This saves a lot of time and headaches when modifying class settings, as you only have to make the change once, instead of going class by class (potentially leaving a class or two out).



## KATHLEEN

One of my favorite hacks is the ability to embed/post different workout tracking areas to your website:

With our newly upgraded workout tracking feature, you can now embed specific workout information to your website. These options include the Daily Leaderboard, All Time Leaderboard, and Daily Workout with the opportunity to make the display specific to a program.

To find the specific iframes or HTML code for embedding access Workouts on the left-hand side of your screen:

*Workouts > select the arrow next to Display in the bottom left-hand corner > select Display Settings > choose the area to embed > your iframe will display.*



# HANNAH

## I love our automation abilities:

There are a multitude of preset automations already built into the database for easy activation. These automations will give you the ability to send “personalized” automatic emails to your students based off of specific criteria and will ease your administrative workload as business owner.

Some preset automations include a failed payments alert, a happy birthday email, and an expiring credit card alert. To view the automations library we have provided:

*Access Setup > select Automations on the left-hand side > click into any automation to review the criteria and document template. To activate an automation, simply check the box next to Automation is Active > save changes.*





## CONNIE

**My favorite hack is the ability to quickly check-in and charge a drop-in:**

If a person does not sign up and pay for a drop-in ahead of time through your Member Connect site, you can quickly check them in as a drop-in and charge them right through the Calendar. It becomes important to track how many "drop-ins" you get on a weekly, monthly and even yearly basis for financial and attendance reports.

To check in a "drop-in" and charge them through the calendar:

*Select your Calendar Icon > select the class they are attending > select "+ Person" > select "+ Add a New Person" > enter their First Name and Last Name > Attendance: select "Drop-In" > check the "Attended?" box > select the Payment Type > pay for Drop-In Class and Sign In*