



Onboarding 101 Workbook



Welcome!

This comprehensive workbook is designed to empower your business journey with WellnessLiving business management software.

This workbook is your onboarding ally, carefully crafted to support you as you establish your business within the WellnessLiving business management software.

In the following pages, you'll find a series of questions and scenarios to help guide you in choosing which settings will best align with your unique business vision and model. Each choice contributes to your business's unique recipe for success, balancing considerations around risk tolerance, customer service, and employee access to information.

Let's ensure each decision you make unlocks the full potential of your offerings, fostering an environment where both your business and your clients can thrive!



Business Policies

Booking Policy

Setup > Business > Business Policies > Booking Policy

1. Minimum and Maximum Booking Timeframes

? Question

What is your desired lead time for bookings to ensure adequate preparation and scheduling?

	Pros	Cons
Short Minimum Booking Window	Allows for flexibility and can attract last-minute bookings, potentially increasing revenue.	May lead to operational challenges with staffing and resource allocation on short notice.
Long Minimum Booking Window	Provides ample preparation time for staff and can ensure better-organized sessions.	Might deter spontaneous clients and reduce the total number of bookings.
Short Maximum Booking Window	Keeps scheduling more immediate and can reduce the impact of cancellations and changes.	May limit the ability of clients to plan ahead, potentially affecting those who prefer to schedule well in advance.
Long Maximum Booking Window	Accommodates clients who plan far ahead and can secure bookings well into the future.	Longer-term bookings can lead to higher cancellation rates as clients' plans change over time.

Customer Story

A circus arts training center sets up its rigs before students arrive to class. For safety reasons, they prefer a teacher-student ratio of no more than 8 to 1, so an assistant is brought in to help with spotting if additional people register. Because the teacher needs ample time to prepare—both for set up and to ensure teacher-student ratios are manageable—a 24-hour advanced registration is required to secure your spot in class.

2. Clients can only book sessions within their current paid period

A “paid period” is defined by the duration of time a client’s applicable Purchase Option is active.

? Question

Do you want to restrict clients’ booking permissions to only fall within the active time window of their current purchase option?

	Pros	Cons
Clients can only book sessions within their current paid period	Encourages timely payments and renewals, ensuring clients have paid all their fees.	May be seen as inflexible and could discourage clients who wish to plan beyond their current payment cycle or prefer to have more flexibility between purchase time and use.

Customer Story

A group fitness center changes their class offerings monthly, and they offer monthly memberships that begin on the first of every month. For this reason, the gym owner wants to be able to restrict clients’ ability to enroll in classes outside of the current month.

3. Clients with a negative account balance cannot book services

? Question

How will restrictions on clients with negative balances impact your client relations and financial health?

	Pros	Cons
Clients with a negative account balance cannot book services	Encourages clients to pay their balance quickly, ensuring the business maintains a healthy cash flow.	Could result in lost bookings and potentially alienate clients who may be temporarily unable to pay.

Customer Story

After a period of allowing clients to have unpaid classes on their account, a yoga studio decides to clean up their books. They activate this setting to automatically prevent bookings from clients who owe money, encouraging them to pay their debt.

4. Allow clients to make recurring bookings

? Question

How can recurring bookings enhance client retention and predictability in your service scheduling?

	Pros	Cons
Allow clients to make recurring bookings	Enhances client retention and provides a steady, predictable schedule and revenue stream.	May reduce availability for new clients.
New Option! Class Bookings Default to Recurring With No End Date	Offers convenience for clients who attend regularly, reducing the hassle of frequent rebooking.	Could lead to scheduling conflicts if clients forget to cancel on dates they don't wish to attend.

Customer Story

A personal training facility specializes in Active Aging classes serving a demographic that is not always tech savvy. Enabling recurring bookings with no end date gives those clients the peace of mind that they always have a spot in their favorite class. The studio is assured of a consistent revenue stream, allowing them to more accurately predict future sales.

5. Clients must sign in to view available appointments

? Question

Will requiring clients to sign in to view available appointments deter them from signing up for services, or provide needed privacy?

	Pros	Cons
Clients must sign in to view available appointments	Enhances security and privacy of the schedule.	May deter potential clients who wish to quickly check availability without the commitment of signing in.
	Allows business owner to collect marketing information from prospects.	Could add an extra step that complicates the booking process.
	Once a client is signed in, they may be more likely to complete the transaction.	Might affect SEO and online visibility if the schedule cannot be indexed by search engines.

Customer Story

As an added security measure against unwanted visitors, a pole dancing studio decides to require their clients to sign in before viewing available appointments.

6. Restrict staff from booking clients using a Purchase Option with an unsigned contract

? Question

Should your staff be able to book services for clients with unsigned Purchase Option contracts, or is a signed contract required before booking?

	Pros	Cons
Restrict staff from booking clients using a Purchase Option with an unsigned contract	Ensures that clients are fully informed and have agreed to all terms before using the service.	May slow down the booking process if clients are ready to book but have not signed the contract.
	Protects the business legally by ensuring contracts are signed before service delivery.	Could result in lost bookings if clients are put off by the need to complete a contract first.
	Establishes understanding among staff and clients that contracts must be signed in order to book services.	Requires staff to manage the contract signing process, which could add to their workload.

Customer Story

A training gym does not allow staff to schedule a client until they have signed a contract for their membership. The business owner wants to protect their equipment and reduce any risk of misunderstandings or legal issues. Therefore, they require all clients to agree to the terms of service, cancellation policies, and relevant restrictions and expiration dates before using a purchase option to schedule a service.

7. Allow clients to select a date and time, then the available asset.

When enabled, a client can set a time for their booking, then select an asset that is available during that time slot. Note: Activating this setting impacts all assets.

What is an asset (a.k.a. Book-a-Spot asset) in WellnessLiving?

An asset refers to equipment or space at your business that is available to be reserved by clients. Examples could include: a spin bike, a massage or practice room, a locker, or a yoga mat.

? Question

Do you prefer for your clients to select a date and time first, before choosing an asset?

	Pros	Cons
Allow clients to select a date and time, then the available asset	If your assets are similar to one another (e.g. practice room rentals) then it is more convenient for a client to check asset availability by date and time vs. checking availability for each room separately.	If you have unique or coveted assets for rent (e.g. particular fitness equipment that is popular), then your clients may prefer to search by asset first and choose the date and time after.

Customer Story

A spin studio has several identical bikes that can be reserved for private use in between class times. The studio allows clients to reserve specific bikes only after selecting their appointment time, ensuring that multiple clients can use of the spin studio at the same without confusion about which bike has been reserved by whom.

8. Allow clients to book multiple appointments.

When enabled, clients can book more than one appointment in the same booking flow.

? Question

Do you want your clients to be able to easily book multiple appointments at once, or do you prefer to require them to book their appointments one at a time?

	Pros	Cons
Allow clients to book multiple appointments	Clients can easily book all future sessions at one time.	May reduce availability for other clients, especially if few slots are left open.
	Potentially increases revenue per client visit by encouraging greater attendance.	If future staff schedules are prone to frequent changes, you will need to ensure future staff availability is accurate.

Can fill up the schedule more efficiently with fewer gaps.

Customer Story

A personal training gym activates this setting to allow clients to conveniently book multiple future sessions in one sitting.

9. Allow clients to book back-to-back appointments.

When enabled, clients will be able to book appointments in consecutive time slots.

? Question

Is it common in your business for clients to want to book different types of appointments consecutively?

	Pros	Cons
Allow clients to book back-to-back appointments	Increases convenience for clients looking for a comprehensive experience or requiring several services.	Risk of service providers not having adequate time to prepare for the next client if the first appointment overruns. Tip: Use appointment padding.
	Maximizes the use of business hours and can lead to more services provided in a day.	
	Reduces downtime for service providers and can increase their productivity.	

Customer Story

A day spa allows clients to book multiple treatments during a single visit. This can lead to a full day's worth of services booked by a single client (e.g. a massage followed by a facial and a mani/pedi), which increases revenue per visit and enhances the client experience.

Cancellation Policy

Setup > Business > Business Policies > Cancellation Policy

1. Late Cancellation Period

Clients who do not cancel within the specified time frame will be marked as a "Late Cancel" and will have to pay as if they attended the session.

? Question

What is your optimal time frame for late cancellations?

	Pros	Cons
Late Cancellation Period	Encourages clients to keep their appointments or cancel well in advance, improving predictability.	May be perceived as inflexible, potentially deterring clients. Quick Tip: When a client late cancels a service in a WellnessLiving business, a pop-up will appear detailing your businesses' late cancellation policy.
	Allows time to fill the slot if there is a cancellation, reducing lost revenue.	Could lead to negative client experiences in case of unexpected events, however most businesses will make exceptions for extenuating circumstances.
	Allows business to charge for no-shows/late cancels.	

Customer Story

A Pilates center sets a 24-hour late cancellation period for Group Equipment classes, reducing empty slots and allowing waitlisted clients the chance to participate.

2. Allow clients to cancel

? Question

How would providing clients with the ability to cancel appointments influence client satisfaction and booking management in your business?

	Pros	Cons
Allow clients to cancel	Improves client satisfaction by offering control over their bookings.	Could result in a higher number of cancellations.
	Reduces the chance of no-shows as clients can cancel instead of no-showing.	Might lead to exploitation of the system if there are no deterrents for cancellations.

3. Require clients to sign in when they are canceling or confirming a session.

Note: This only applies to when a client is navigating to the software from a link embedded in an SMS or email from your business.

? Question

After clicking a confirmation link your business has sent to them, do you want to require your clients to take the additional step of signing into their account before they can cancel or confirming their session?

	Pros	Cons
Allow clients to select a date and time, then the available asset	If your assets are similar to one another (e.g. practice room rentals) then it is more convenient for a client to check asset availability by date and time vs. checking availability for each room separately.	If you have unique or coveted assets for rent (e.g. particular fitness equipment that is popular), then your clients may prefer to search by asset first and choose the date and time after.

Customer Story

To prevent accidental and unauthorized booking changes, and to deter clients from casually canceling a service they have pre-registered for, a yoga studio requires clients to sign in before making such changes to their scheduled services.

4. Enable a grace period of __ minutes/hours/etc. after booking to cancel the session without penalty.

? Question

What duration should your grace period be post-booking to allow penalty-free cancellations?

	Pros	Cons
Enable a grace period	Allows clients flexibility to cancel mistaken bookings promptly without penalty.	Could lead to frequent booking changes.

Customer Story

A music school offers a 1-hour grace period after booking a private lesson, accommodating immediate changes clients may need to make, while also helping their instructors maintain a reliable schedule.

5. Cancellation and No-Show Penalties

Note: This setting allows you to customize different penalty amounts based on factors like client type and the number of late cancels/no-shows the client has had within a given period.

? Question

What cancellation/no-show policies will best serve your business? Do you want to set different policies for different client types?

	Pros	Cons
Cancellation and No-Show Penalties	Deters no-shows and compensates the business for potential lost revenue and.	Could deter some clients if the policy is too harsh or inflexible.

Customer Story

A busy Medi-spa charges their members 50% of the session cost after the customer's 1st late cancel or no-show. By contrast, non-member drop-ins are charged the full cost of the session if they miss for any reason. This policy significantly discourages missed appointments across all client types and allows the business to recover costs associated with the missed session. It also incentivizes non-members to upgrade to a membership status.

Wait List Policy

[Setup](#) > [Business](#) > [Business Policies](#) > [Wait List Policy](#)

1. Enable Wait List

? Question

Could a wait list system help maximize attendance in your business?

	Pros	Cons
Enable Wait List	Maximizes Class Attendance: Helps ensure that any available spots are filled.	If the first person in line on the waitlist doesn't respond in a timely way, it can reduce the likelihood that others on the waitlist will be notified with enough advanced notice to join the service.

Customer Story

A Yoga studio has several popular classes at peak times of the week. They want to be able to overbook, so that if someone cancels, they do not lose out on missed revenue opportunities and other clients can take advantage of the freed-up spot.

2. Allow clients to join the waitlist unpaid.

When this setting is ON, clients can join the wait list as unpaid as long as they have a saved payment method on file. After promotion, they will be charged for the service if they don't own an applicable Purchase Option.

? Question

Do you want to allow your clients to join a waitlist without upfront payment and then automatically be charged using their stored payment method?

	Pros	Cons
Allow clients to join the waitlist unpaid.	Increased Accessibility: This setting can make it easier for clients to access popular services, streamlining the booking experience and increasing overall attendance.	Risk of No-Shows: Although clients do receive notifications when they have been promoted from the waitlist, they may not see the notification. Unless you require them to confirm, you may not know they are unaware they got promoted. Since payment is collected upon promotion to the class, if the client no-shows, they may demand a refund.
	Clients appreciate being able to hold a spot in line for a service without paying in advance.	If the business is in need of cash flow, then allowing customers to join a waitlist of a coveted service without requiring upfront payment could be a missed revenue opportunity.
	WellnessLiving makes it easy to collect payments automatically, so you don't have to deal with the administrative hassle of chasing down payments.	If the first person in line's payment is declined, it will automatically charge to the client's account balance, requiring a collection of payment at a later time.

3. Limit the maximum number of clients on the wait list to ____.

? Question

How many people do you want to allow to sign up for a waitlist?

	Pros	Cons
Limiting the maximum number of clients on the wait list	Manageable Expectations: A limit can prevent an unmanageably long waitlist, setting realistic expectations for clients.	Potential Client Frustration: Clients may be disappointed or frustrated if they're unable to join a waitlist because it's already full.

Efficient Service Management:

It allows for more effective management of overbookings and ensures that waitlisted clients have a reasonable chance of being promoted.

Lost Opportunities:

Limiting the waitlist could potentially mean missed opportunities if spots become available and there aren't enough clients waitlisted to fill them.

4. Clients are promoted automatically in the order they joined the wait list up to __ hours/days/weeks before the session start time vs. Clients are notified in the order they joined the waitlist and must confirm within __ hours/days/weeks.

? Question

Would your business benefit more from an automated or manual confirmation of waitlist promotion?

	Pros	Cons
Pros of Automated Promotion	Efficiency: Automatic promotion streamlines the booking process, filling spots quickly and reducing staff workload.	Fairness: It upholds a first-come, first-served policy, ensuring clients are treated equally based on when they joined the waitlist.
Cons of Automated Promotion	Less Client Control: Clients may be automatically promoted without their immediate input, which could lead to an increase in last-minute cancellations if they're not ready to commit.	Potential for Client Overlook: Clients might miss their chance if they don't see the notifications or if the promotion happens when they're unavailable.
Pros of Manual Confirmation	Client Engagement: Requiring clients to manually confirm gives them an active role, which may increase their commitment to attending the session.	Greater Flexibility: Clients can decide whether they can attend the session, reducing the likelihood of no-shows.

Cons of Manual Confirmation

Delayed Process:

Waiting for clients to confirm can slow down the promotion process, possibly leading to unfilled spots.

Increased Administrative Effort:

Staff may need to spend more time managing the waitlist and following up with clients for confirmations.

Customer Story

Automatic Promotion:

A high-intensity interval training (HIIT) class experiences frequent last-minute openings. They opt for an automated promotion system to quickly fill these spots. Clients are aware that if they're on the waitlist, they need to be prepared for short-notice availability. This system benefits the business by maximizing attendance and revenue, with the trade-off being that clients need to be more attentive to potential promotions.

Customer Story

Manual Confirmation:

An art school offering popular painting classes chooses a manual confirmation setting with a 24-hour response window. This approach allows interested clients to plan accordingly and ensures that those who are promoted to the class have confirmed, which reduces the risk of no-shows. It provides a balance by giving clients enough notice to adjust their schedules while keeping class rosters full.

Attendance Tracking

[Setup](#) > [Business](#) > [Business Policies](#) > [Attendance Tracking](#)

1. In-Person Services

? Question

After an in-person service ends, how should a client be automatically marked?

(You can manually adjust this at any time.)

Checked-In	May be useful in situations when no one is available to do manual check-in and/or attendance knowledge is less important (e.g. customers pre-register and pre-pay for services.)
No-Show	May be useful for when self-check-in by the client is mandatory and they are charged regardless of whether they attend or not.
Pending	May be useful for a process where the staff member is expected to verify attendance at the end of class.

2. Virtual Services

2a. Start non-integrated virtual sessions automatically __ minutes before the scheduled start time.

When enabled, clients will be able to enter a non-integrated virtual service without the host by clicking the Join button or the join link up to a specified duration before it is scheduled to begin.

? Question

Should non-integrated virtual sessions start automatically before the scheduled start time?

What is an Integrated vs. Non-Integrated Virtual Session?

Integrated sessions are only available for customers who are subscribed to FitLive. When you set up a virtual service as a FitLive subscriber, a unique Zoom link is automatically generated for each session.

WellnessLiving users can also opt to host Non-Integrated virtual sessions, regardless of whether you are a FitLive subscriber. To set up a non-integrated virtual service, you must copy and paste your own virtual session link (e.g. Zoom, Google Meet, etc.) into each service that you schedule.

Customer Story

A yoga studio hosts weekly non-integrated Zoom sessions as part of their teacher training program. Students are permitted to join early to chat amongst themselves or in the case that an instructor is running late, the session would not be held up.

2b. Mark clients as checked-in when they join a virtual session via the join link

? Question

Should the system automatically mark clients as checked-in when they join a virtual session via the join link?

Customer Story

Enabling this setting allows a virtual Pilates Mat class teacher to automatically track attendance.

Time Zone

[Setup](#) > [Business](#) > [Business Policies](#) > [Time Zone](#)

1. Allow clients to adjust time zone

? Question

Should I allow clients to adjust their time zone?

	Pros	Cons
Allow clients to adjust time zone	Notifications and schedule appear in the client's preferred time zone. This is especially helpful for clients attending virtual sessions in a different time zone.	Potential for confusion: If a client moves between time zones, they would need to manually adjust the time zone in their profile.
		Adds an additional question when a new client sets up their profile. (You can choose to make this a required question or not.)

Customer Story

An online fitness studio offers live virtual classes that are attended by clients around the world. Enabling clients to set their own time zone ensures that all schedule and booking confirmations display the appropriate time for the client.

Security

[Setup](#) > [Business](#) > [Business Policies](#) > [Security](#)

1. Staff members will be logged out after ____ minutes of inactivity.

? Question

What is the ideal balance between security and convenience when setting automatic logout times for staff inactivity?

Pros

Increased Security:

Automatic logouts help protect sensitive client data and reduce the risk of unauthorized access.

Cons

Potential for Disruption:

Staff might find frequent logins disruptive, especially during busy periods.

Customer Story

The front desk workers at a martial arts center are responsible for cleaning and must leave the desk in between classes, leaving the system unattended. A 30-minute inactivity logout is enabled to enhance security without significantly disrupting staff workflows.

2. Restrict staff member access by IP address

? Question

Will the benefits of setting IP address restrictions for access to WellnessLiving (increased security and control) outweigh the potential drawbacks for your business?

	Pros	Cons
Restrict staff member access by IP address	Controlled Access: Ensures that staff can only access the system when on-site, reducing the risk of unauthorized clock-ins, adjustments to the schedule, etc.	When this setting is enabled, those staff whose roles that are impacted will not be able to use the Elevate staff app. If the business relies upon the mobile app to complete bookings and payments offsite, then enabling this setting may limit your ability to do so. If the business's network experiences issues, it could prevent staff from accessing the system even when on-site.

Access to Related Client Files

1. Display relationships on the Client Web App and Achieve Client App

When enabled, clients will be able to view client profile relationships.

? Question

Does your business offer services for friends and families and do you want them to be able to book for one another, see one another's profiles, and potentially share passes and memberships?

Note: This setting must be toggled on to enable any client relationships.

2. Allow clients to sign in to and edit related profiles of the selected relationship types.

? Question

Do you want clients to be able to sign in to and edit profiles for their relationships?

	Pros	Cons
Allow clients to sign in to and edit related profiles of the selected relationship types.	Simplified Account Management: This setting can empower clients to manage their family members' profiles, reducing administrative work.	Overstepping Boundaries: There could be issues with overreach, where clients edit information that the related person would prefer to manage personally.
	Increased Convenience: Makes it easier for clients to update information on behalf of their family members or dependents, improving the efficiency of profile updates.	Clients may incorrectly book for a family member instead of themselves, leading to confusion.

Customer Story

A wrestling center specializes in working with teenagers and wants parents to have the ability to create and modify profiles and associated documentation on behalf of their minor children. They add “child” as the relationship that can be edited, but they do not add “parent.” In this case, parents will be able to edit their children’s account but not the other way around.

3. Allow clients to book for their relationships without switching profiles.

Displays the ‘Booking for’ step in the client booking flow. Only parent/child relationships require the client to sign waivers and fill out forms as part of the booking process.

? Question

How might enabling clients to book on behalf of their dependents without profile switching streamline the booking process and affect client satisfaction?

	Pros	Cons
Allow clients to book for their relationships without switching profiles	Streamlined Booking Process: Clients can book services for their relationships (e.g. multiple children or other dependents) without the hassle of switching accounts, offering an easier experience.	Potential for confusion and/or privacy issues with passes. This setting enables a client to book a service for their relationship (e.g. spouse, sibling, friend) using that person’s purchase option.

Customer Story

Katie is a client at a Personal Training gym that allows clients to book for their relationships without switching profiles. Katie logs in to the client web app under her own profile, and wants to book a service for her husband James. When she goes to pay for the appointment, she can use a Purchase Option that James already owns to pay for the appointment. However, if James has used up his pass, she is prompted to pay using her own payment details. She will not be permitted to use James’ saved payment information to pay for the service unless

she is logged into WellnessLiving under his account.

Automatic Payments

Setup > Business > Business Policies > Automatic Payments

1. Reattempt failed automatic payments ____ times before charging the client's account balance.

? Question

How many attempts at processing a failed automatic payment strike the right balance between diligence in collecting payments and respecting client circumstances?

Pros	Cons
Persistence in Payment Collection: Multiple attempts can increase the chances of successful payment, securing revenue for the business.	Persistence in Payment Collection: Multiple attempts can increase the chances of successful payment, securing revenue for the business.
Client Convenience: Clients may appreciate the system's persistence, as it can account for temporary issues like banking errors or expired cards without requiring their direct involvement.	Merchant Processing Fees: When a payment continuously fails, the business is charged the merchant processing fee for each attempt (usually 20 to 40 cents per attempt), which can add up, especially if you've set this policy to a higher number of attempts.

Customer Story

A membership-based fitness center opts to reattempt failed automatic payments three times before charging the client's account balance. This policy allows for common banking issues to be resolved and maintains a good relationship with clients by not immediately penalizing them for a failed payment. However, the center has to monitor these attempts closely both to ensure that the automation is not adding inordinately to costs, and to avoid any surprises or dissatisfaction for clients.

2. Charge \$__ to client's account balance after final failed payment attempt.

Quick Tip: After the final attempt at charging an automatic payment has failed, the client's account is automatically debited for the amount owed.

? Question

Would you like to charge clients a fee for failed credit card attempts?

Pros	Cons
Automatically recoup merchant processing costs to the business and/or impose a service fee to cover administrative costs and encourage clients to keep their payment methods up to date.	Client may become upset if this policy is not clearly stated up front.

3. Do not reattempt autopayment for the following decline reasons:

? Question

Which decline reasons should you reattempt autopayment for, and which ones aren't worth it?

Quick Tip: Failed credit card transactions fall into two categories: hard declines and soft declines. Hard declines (e.g. an invalid expiration date or an invalid card number) are less likely to be resolved than a soft decline (e.g. insufficient funds). If you want to minimize the risk of racking up processing fees for unresolvable issues, then you may want to select "do not reattempt autopayment" for the following decline reasons: No such issuer, Credit card is expired, Invalid expiration date, and Invalid card number.

Purchase Options

Setup > Business > Business Policies > Purchase Options

1. Enable priority levels to determine which Purchase Option is used to book a service

? Question

Do you want to ensure that purchase options get applied to services in a particular order to optimize for factors like expiration dates?

	Pros	Cons
Enable priority levels to determine which Purchase Option is used to book a service	Simplifies Booking: If a client has multiple purchase options, the system will automatically choose the best option based on a pre-defined priority setting.	Reduces clients' responsibility to monitor their own passes' expirations dates, which could result in lost revenue for the business.

Customer Story

A salsa dance studio offers a free birthday class to be used within one month of a client's birthday. By activating this setting, the birthday pass is automatically applied first even though the client also has another applicable purchase option. This helps ensure that the birthday pass does not expire without being used.

Sign-in Options

Setup > Business > Business Policies > Sign-in Options

? Question

Would you like your clients to be able to sign in to WellnessLiving using their Google, Facebook, Microsoft, and/or Apple accounts?

Pros	Cons
Convenience and User Familiarity: Using sign-in options from major tech platforms like Google, Facebook, Microsoft, and Apple can make it easier and more convenient for clients to sign in.	Privacy Concerns: Clients may have reservations about linking their personal social media or tech accounts due to privacy concerns, fearing data sharing or breaches that could occur with third-party services.
	Access Risks: If there is a security breach in one of these platforms, it could impact the access and security of the client's WL account.

Client Settings

Setup > Business > Business Policies > Client Settings

1. Show client vaccination status

? Question

How would displaying vaccination status impact client trust and safety perceptions, in the context of your business?

	Pros	Cons
Show client vaccination status	Enhanced Client Safety Confidence: Displaying vaccination status can reassure clients that your business prioritizes health and safety, potentially increasing their confidence and comfort in using your services.	Privacy Concerns: Some clients might view the requirement to disclose vaccination status as an invasion of privacy, which could lead to dissatisfaction or loss of business from those who value medical confidentiality.

Public Health Contribution:

By promoting awareness of vaccination status, your business actively contributes to public health efforts and community well-being, which could enhance your brand's social responsibility image.

Potential Discrimination Issues:

There's a risk that displaying vaccination status could lead to perceived or actual discrimination, creating a divide among clients and possibly resulting in negative publicity or legal challenges.

2. Automatically generate client IDs for new clients

Automatically generate client IDs for new clients

? Question

Do you want a system-generated number, or would you rather come up with your own convention for tagging your members?

	Pros	Cons
Automatically generate client IDs for new clients	If you have a barcode scanner and want clients to be able to use the Achieve App to scan themselves in for class or open gym access, then turning this setting on immediately enables your clients to pull up their profile's unique barcode on their phone.	Not applicable if you prefer to have control over your client's profile ID (e.g. you want to track members in the order they joined, or you need the client ID to match pre-printed key tags or ID cards).

Customer Story

A busy gym with a high number of walk-ins has all new customers sign themselves up on the spot by downloading the Achieve app and setting up an account. The staff member then shows them where to access the barcode so that the client can quickly sign in using the barcode scanner for all future visits.

Quick Tip: If you are interested in incorporating a barcode scanner and/or custom key tags for your business, you can email merchant@wellnessliving.com