Halo.Fitness

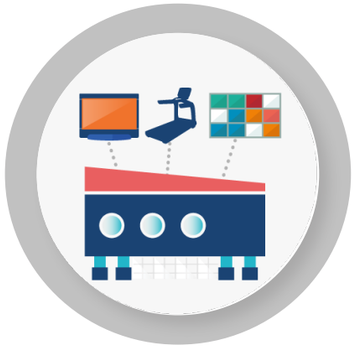
FACILITY QUICK MANUAL

Guide for Facility Manager, Personal Trainers and Staff to understand the main features and functionalities included on all Halo.Fitness plans and add-ons.

HALO

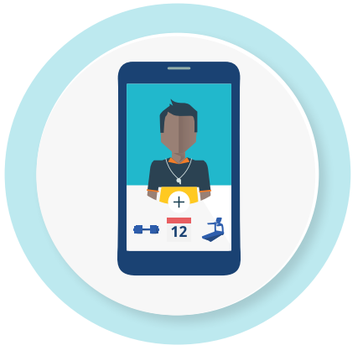
HALO FITNESS CLOUD PLANS & ADD-ONS

Plans

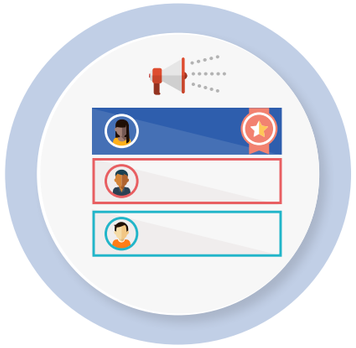


Standard Plan

Core Plan



Train Plan



Engage Plan

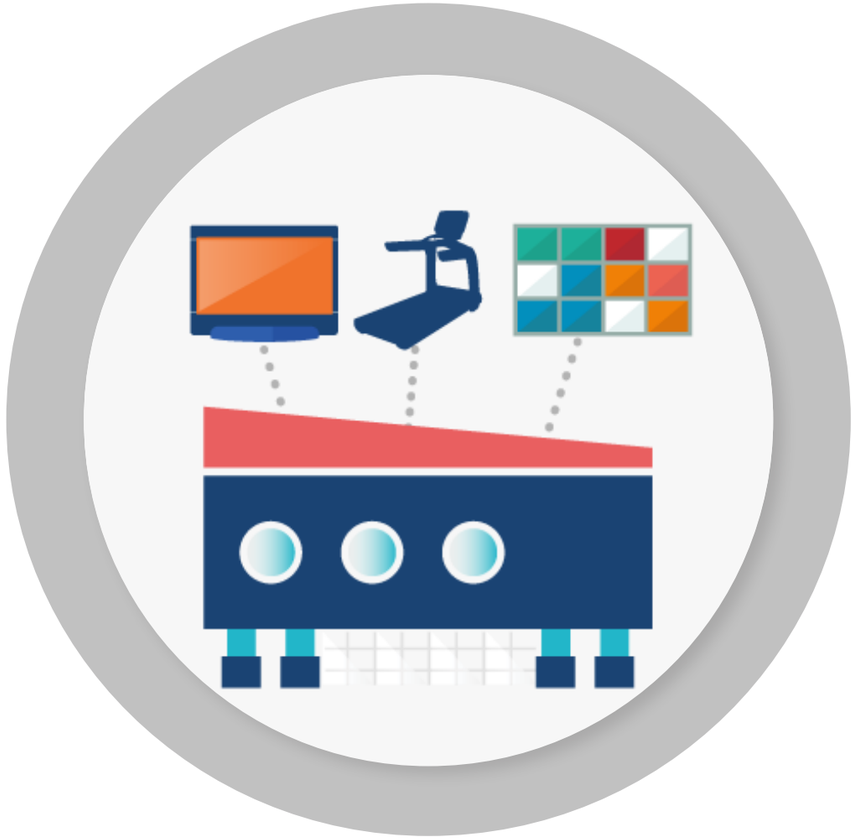
Add-Ons

Retain

Job Tracker

STANDARD PLAN (COMPLIMENTARY WITH CONNECTED CARDIO)

The following functionalities are included on the Standard Plan.



FACILITY & STAFF UPDATES

- Add, edit and rename your gym equipment
- Add and edit staff
- View heat map of facility

EQUIPMENT MANAGEMENT

- Customize Product Settings
  - Attract Screens
  - Announcements
  - TV Settings
  - Internet Favorites
  - Equipment Type Settings
- Update Software
  - Remote Updates
  - Lifescape/RideSocial Courses
- View Usage Statistics

SERVICE & MAINTENANCE

- Equipment Rotations
- Equipment Maintenance
- Preventive plan
- Maintenance History

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FACILITY & STAFF UPDATE

Adding equipment to your account

WHAT IS THIS FOR?

The facility management features allows you to add equipment into your Halo facility account. By doing this, you can see equipment usage and perform remote configuration settings of all your connected equipment.

STEPS

1. Navigate to Facility Tab
2. Click on Equipment Tab
3. Click on Add Equipment
4. Enter Serial Number/MAC Address (including all symbols)
5. Click Next
6. Click Add Equipment

OUTCOME

Connected equipment is added to the facility

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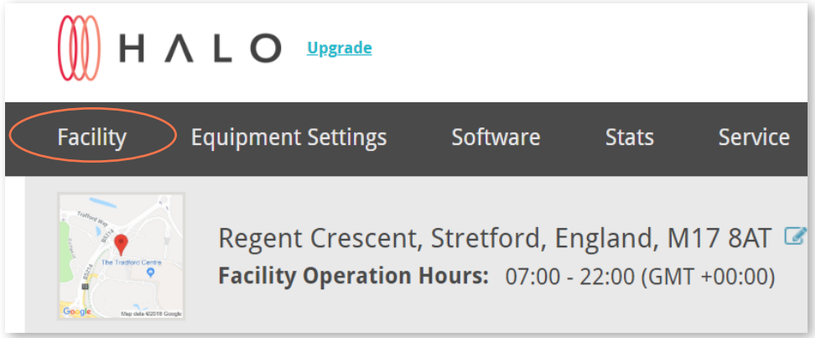

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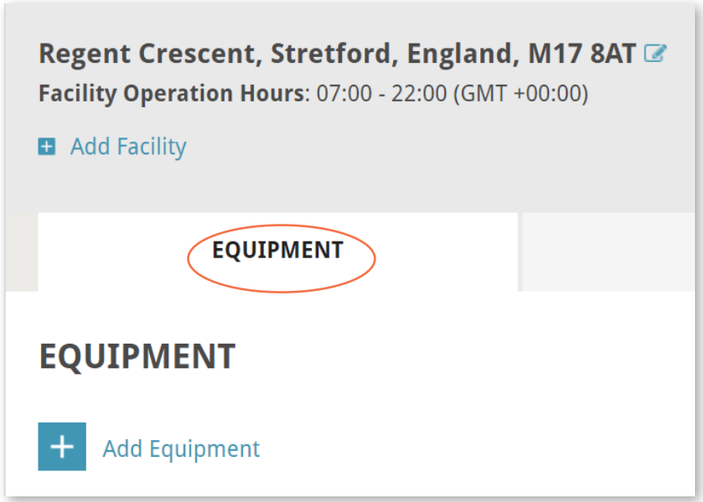

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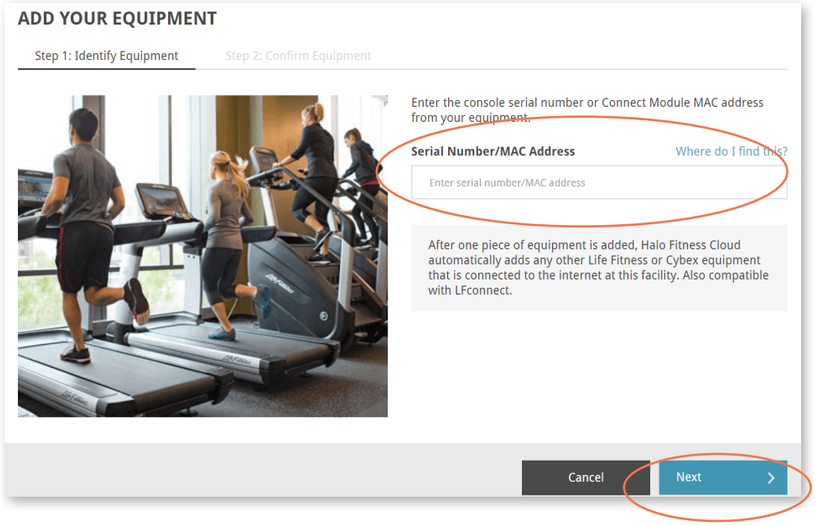

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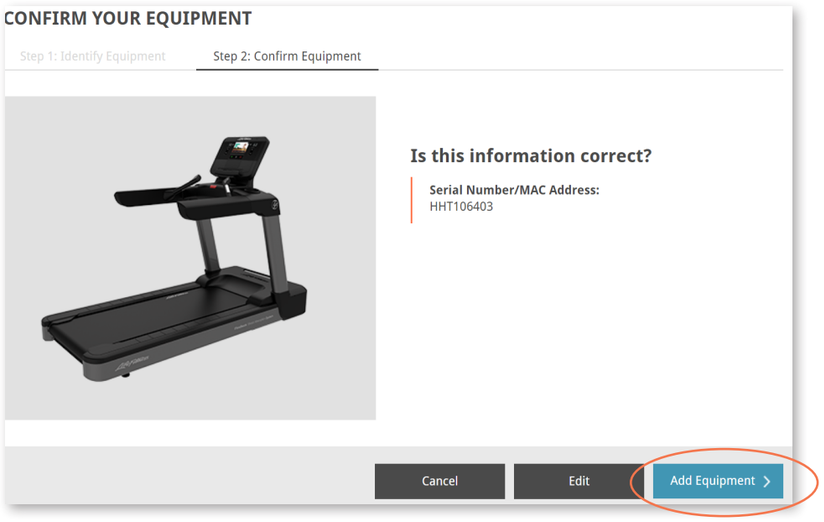

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FACILITY & STAFF UPDATE

Naming your equipment

WHAT IS THIS FOR?

You are able to assign names to the equipment on your facility's floor so it becomes easier to interact with the platform. When reviewing the equipment usage statistics, you immediately know which machines are being used; when identifying service notices, you can quickly spot the exact piece of equipment.

STEPS

1. Navigate to Facility Tab
2. Click on Equipment Tab
3. Expand equipment section
   - a. Option 1: Click on edit icon to name the equipment
   - b. Option 2: Click on Name All Equipment to name all the equipment
4. Click Save

OUTCOME

Names are assigned to the equipment on the facility

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OPTION A: NAMING ONE PIECE OF EQUIPMENT

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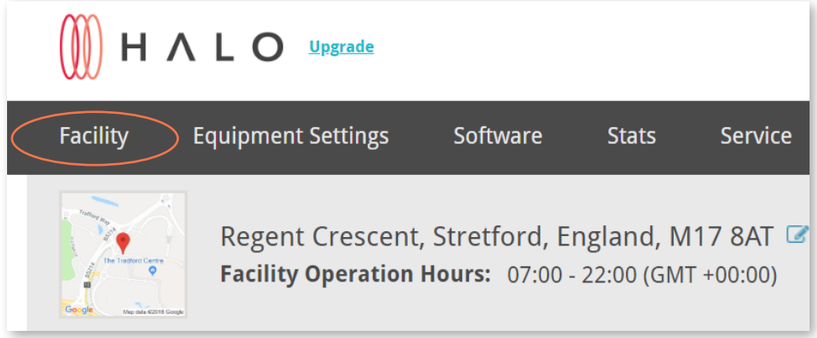

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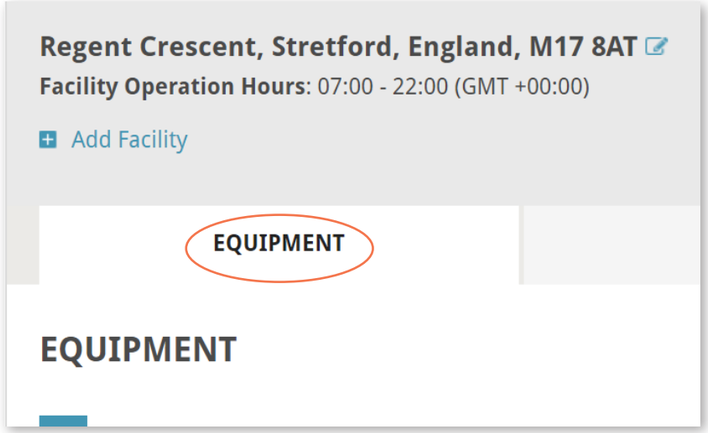

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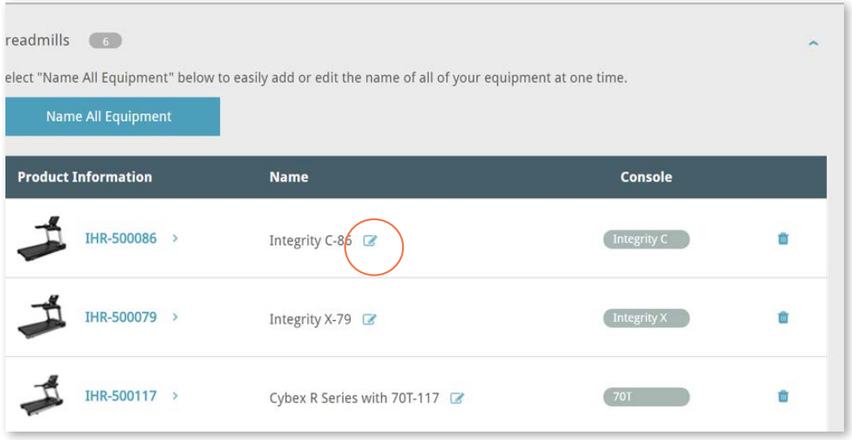

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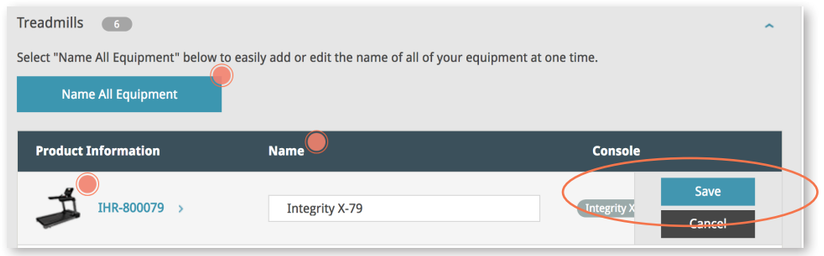

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OPTION B: NAMING ALL EQUIPMENT

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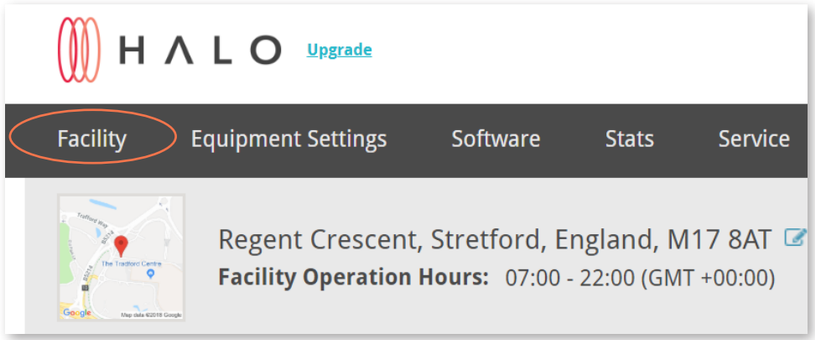

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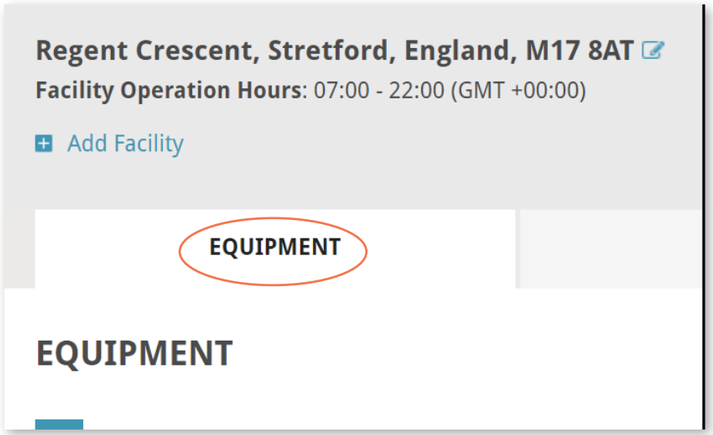

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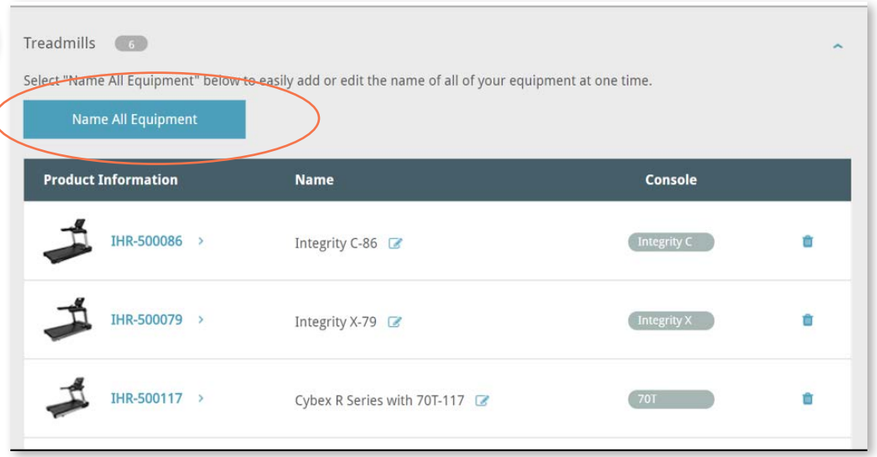

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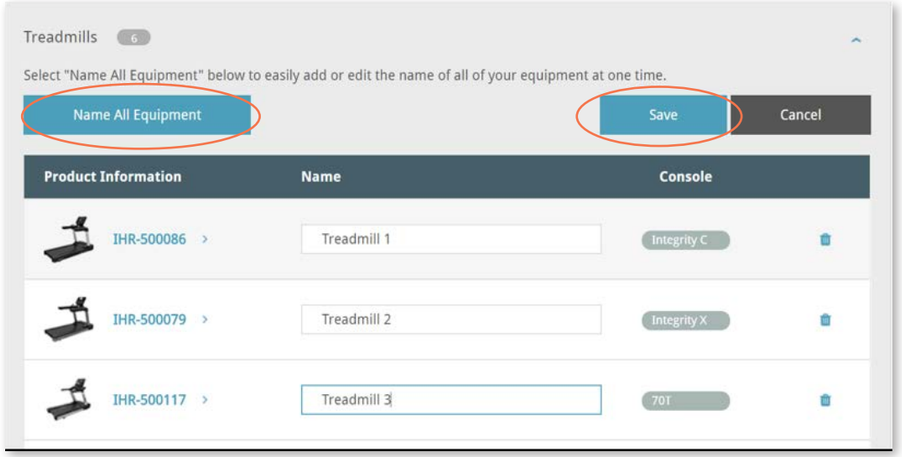

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FACILITY & STAFF UPDATE

Add Staff to Facility

WHAT IS THIS FOR?

Add your staff and define access levels based on what your staff manages, such as, equipment management, training plan creation or challenge & promotion development.

STEPS

1. Navigate to Facility tab
2. Click on Staff tab
3. Click on Add Staff
4. Insert Staff Email
5. Select the desired level of access
6. Click Create

OUTCOME

New staff is added to facility

Staff member receives an email with information to login and create password

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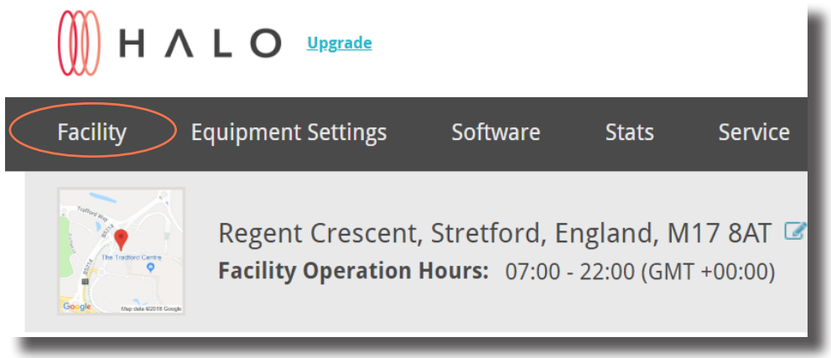

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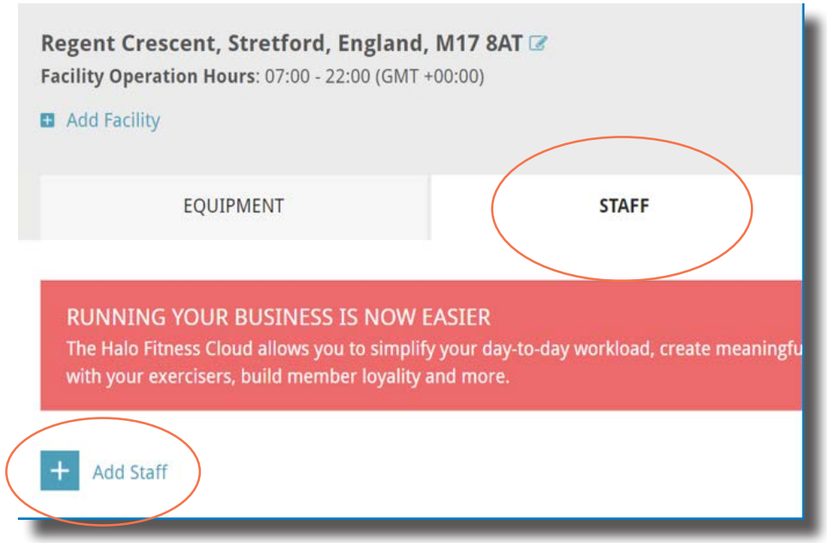

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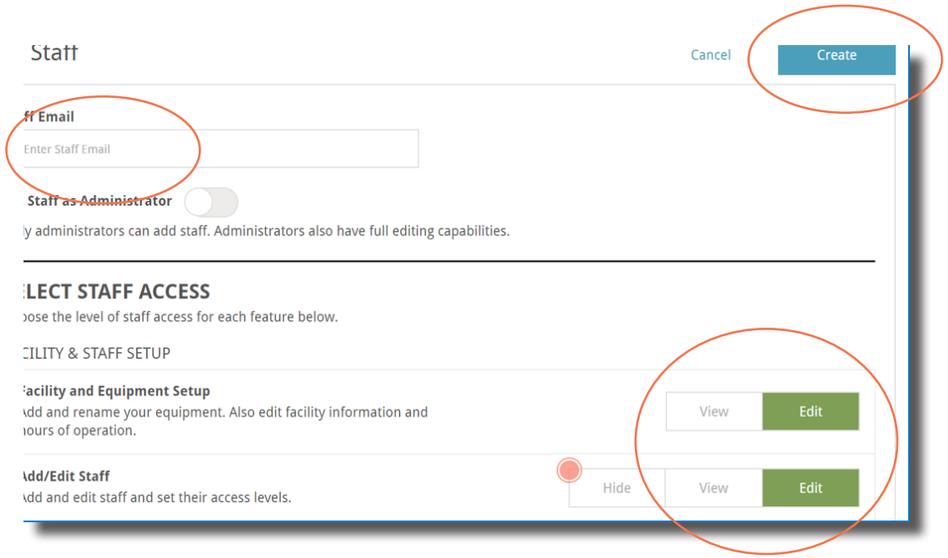

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FACILITY & STAFF UPDATE

Heat Map Equipment Setup

WHAT IS THIS FOR?

Using a Heat Map format, you can arrange machines on a digital grid reflecting your equipment layout. The heat map displays colors to correspond to the real-time usage of your connected equipment.

STEPS

1. Navigate to Homepage
2. Scroll down to view the heatmap grid
3. Click on an empty space on the grid to add the equipment on the map
4. Choose a piece of equipment to add to that space

OUTCOME

Facility heatmap is created

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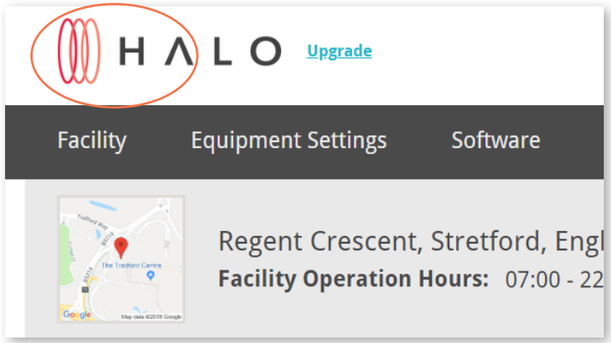

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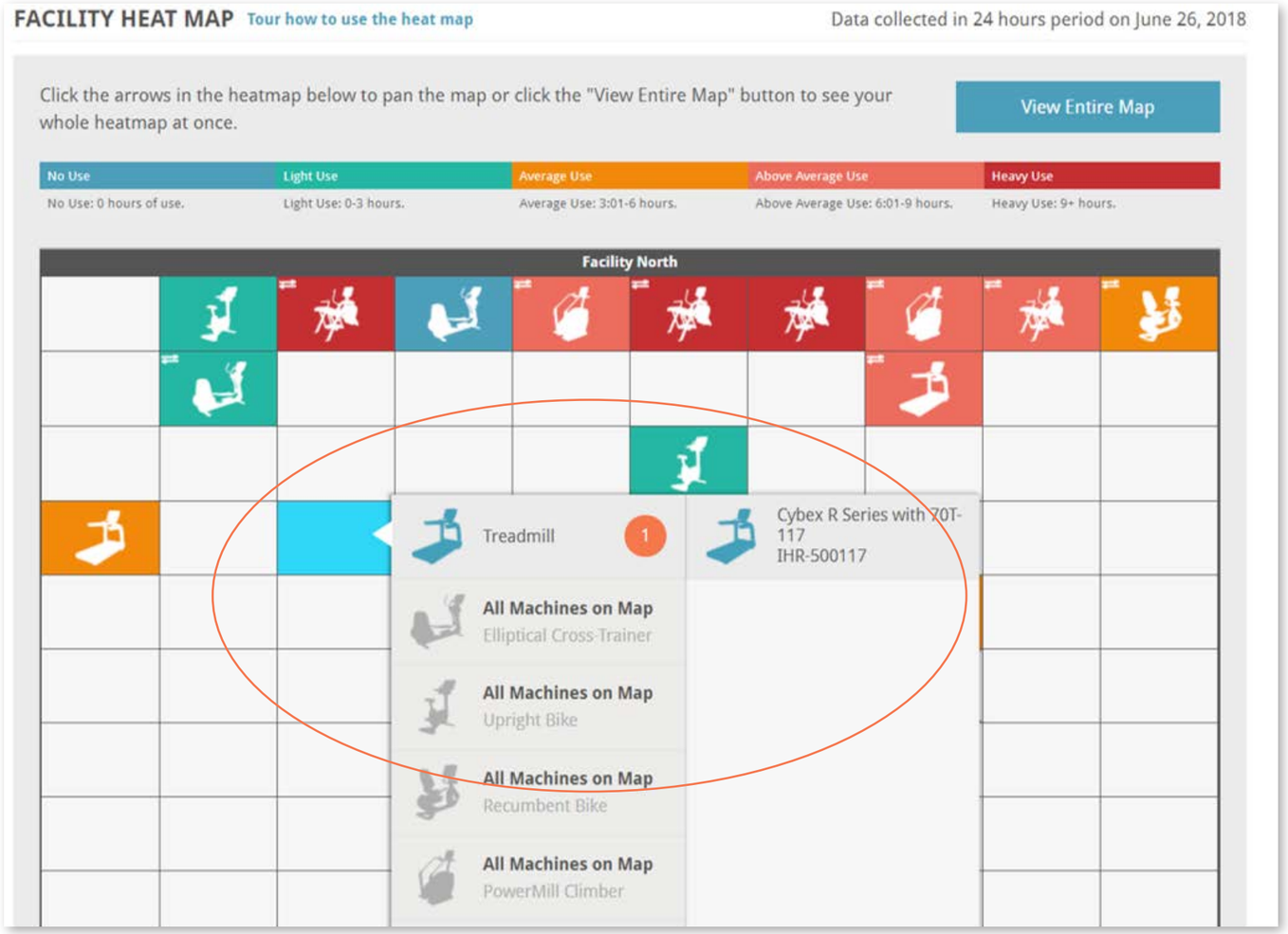

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EQUIPMENT MANAGEMENT

Console Settings – Attract Screens

WHAT IS THIS FOR?

Attract Screens are displayed on the console when it is not in use. You can customize these screens by creating your own artwork and uploading it to the console. Use this space to promote group classes in your facility, specials in your cafe or shop, etc.

STEPS

1. Navigate to Equipment Settings tab
2. Select Console
3. Click Attract Screens tab
4. Click on Add Attract Screen
5. Insert a name for the Attract Screen set
6. Select the image(s) you want to include on the Attract Screen set
7. Click Choose Equipment
8. Click Publish

OUTCOME

An attract screen set is published on a cardio equipment

A new attract screen set is saved on the facility account

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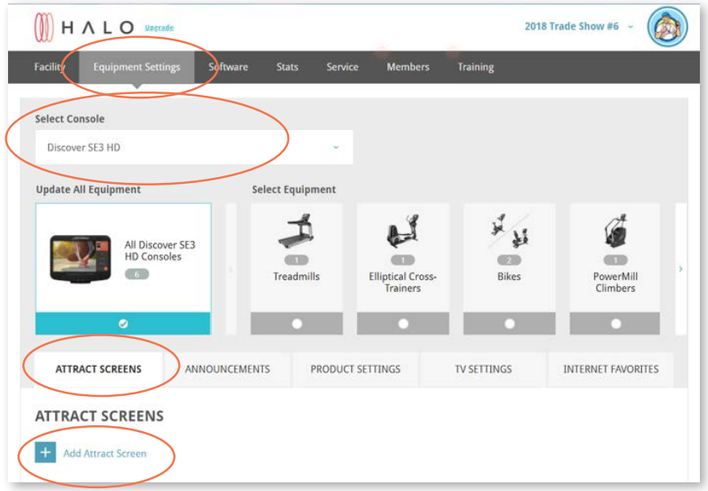

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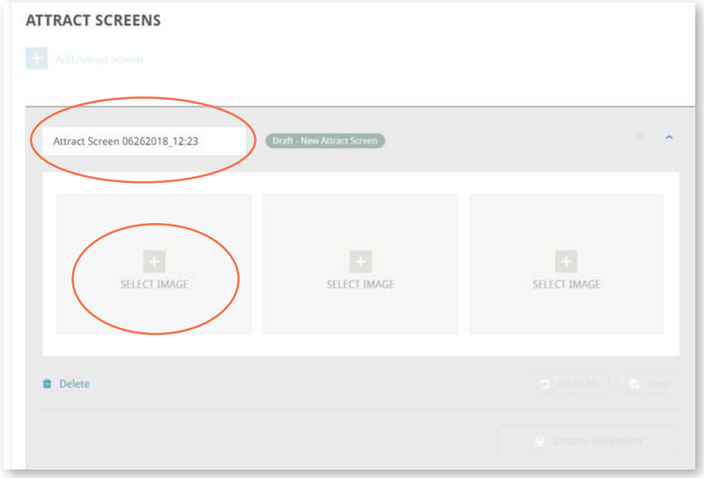

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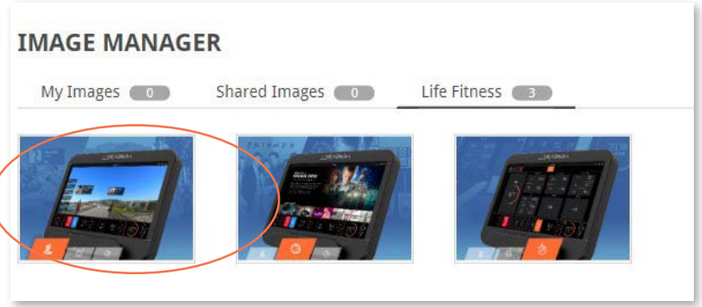

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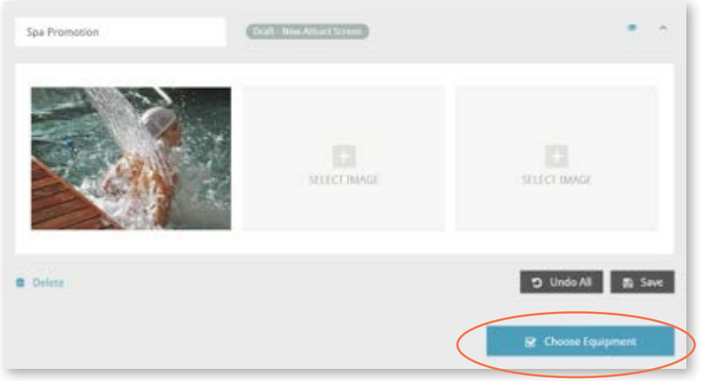

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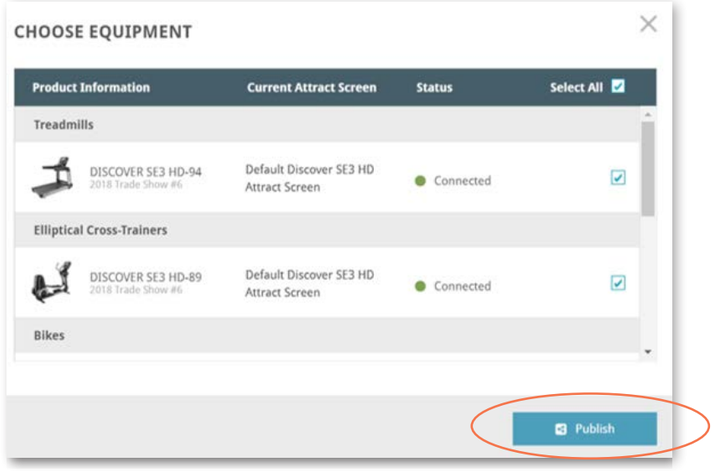

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EQUIPMENT MANAGEMENT

Console Settngs – Announcements

WHAT IS THIS FOR?

For Discover ST, SE3 and SE3HD consoles, you have an additional opportunity to connect with your exercisers. Announcements are displayed on the upper right hand corner of the console during an exerciser's workout. Use this space for motivational messaging or letting exercisers know of events in your facility.

STEPS

1. Navigate to Equipment Settings tab
2. Select Console
3. Click on Announcements tab
4. Click on Add Announcement
5. Insert a name, title and message for the Announcement
6. Drag and drop to re-order Announcements
7. Select Display Duration
8. Click Publish

OUTCOME

An announcement set is published on all consoles

A new announcement set is saved on the facility account

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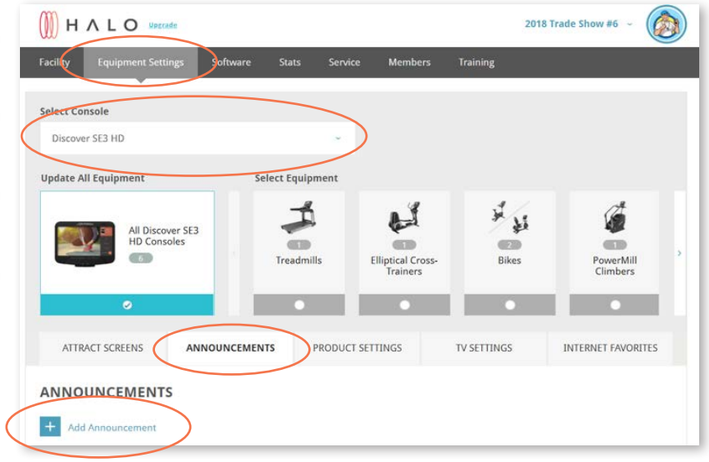

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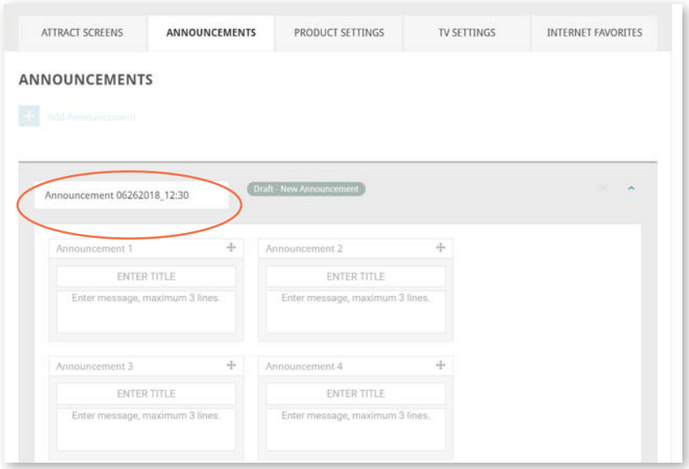

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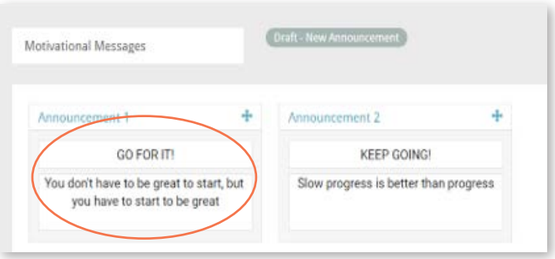

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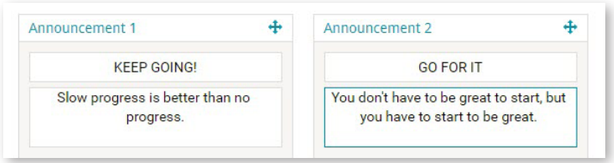

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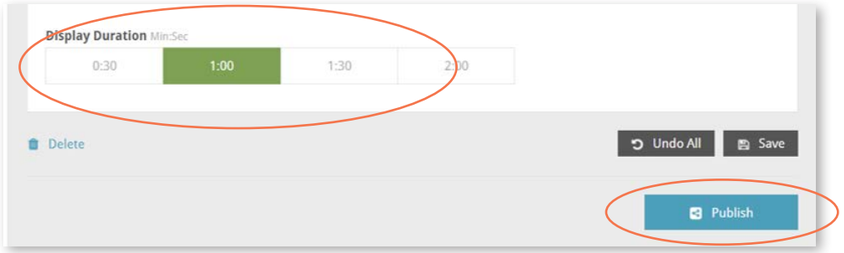

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EQUIPMENT MANAGEMENT

Console Settings – Product Settings

WHAT IS THIS FOR?

Customize the Product Settings, such as, units of measure, auto shutoff times, language and more to your preference and the preference of your exercisers. Based on console type, the available product settings will be displayed.

STEPS

1. Navigate to Equipment Settings tab
2. Select Console
3. Click on Product Settings tabs
4. Click on Add Product Setting
5. Insert a name for the Product Setting
6. Select all the settings that apply in the General, Internet and Entertainment tabs
7. Click Publish

OUTCOME

- A Product Setting is published on all cardio equipment
- A Product Setting set is saved on the facility account

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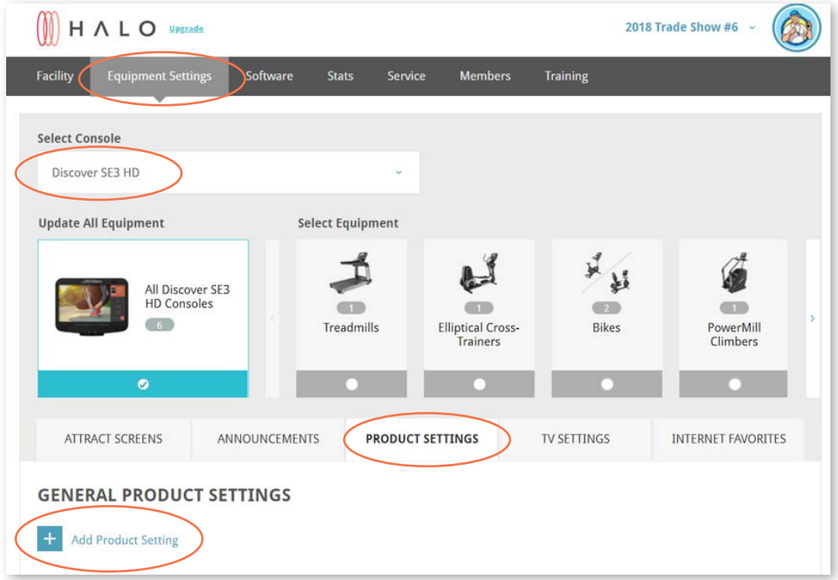

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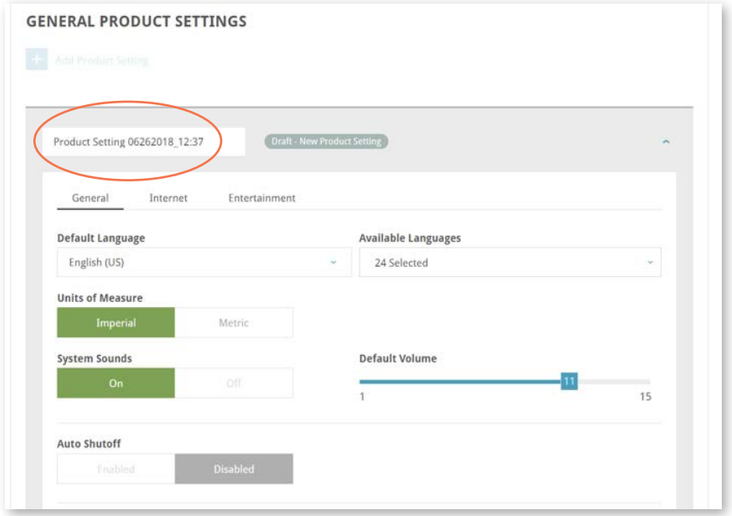

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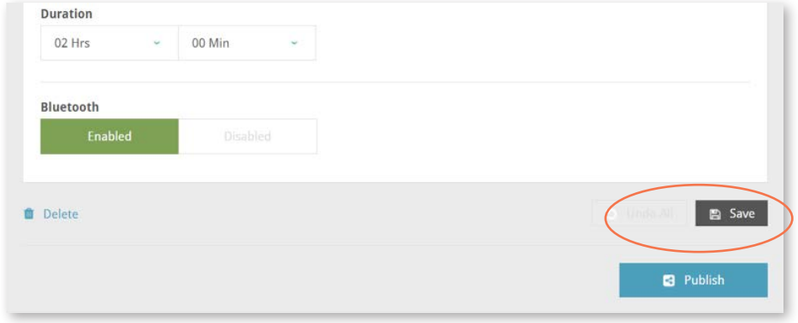

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EQUIPMENT MANAGEMENT

Console Settings – TV Settings

WHAT IS THIS FOR?

Easily help your members find their favorite channels by changing the channel number list to reflect the TV channel names. This feature will appear when the channel list has been scanned and uploaded from a console in your facility.

STEPS

1. Navigate to Equipment Settings Tab
2. Select Console
3. Click on TV Settings tab
4. Insert names for the TV Channels
5. Click Publish

OUTCOME

TV channels names are set and displayed on console

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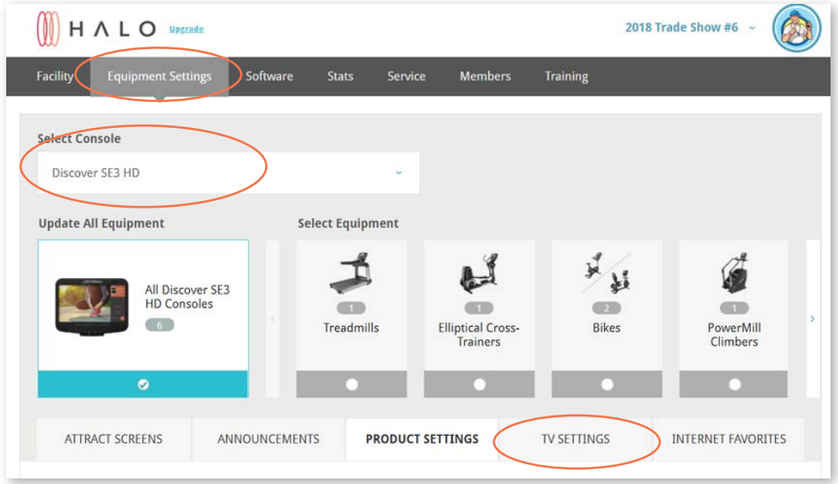

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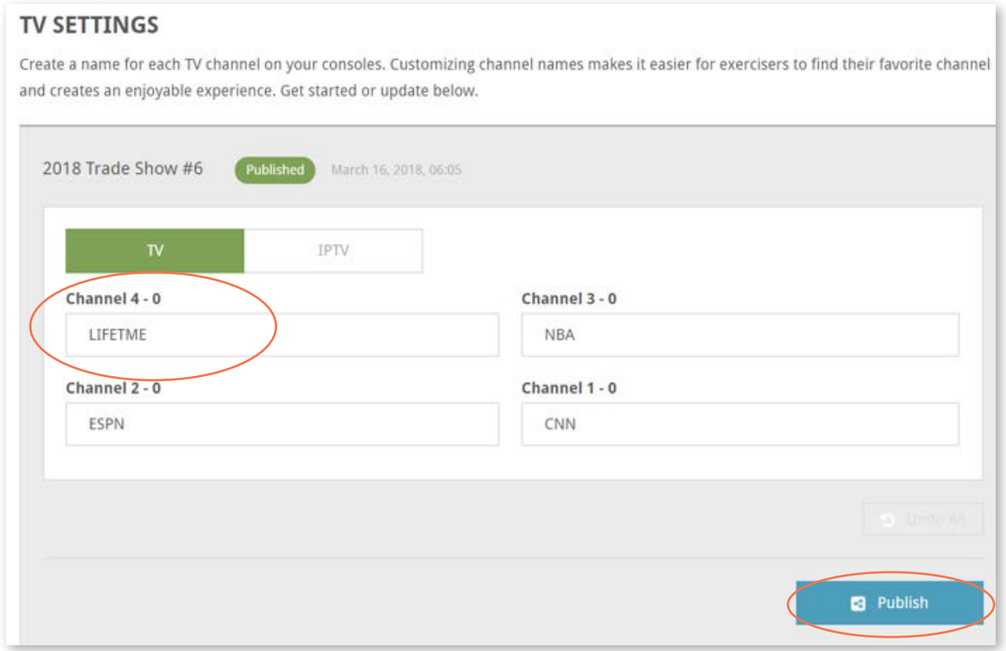

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EQUIPMENT MANAGEMENT

Console Settings – Internet Favorites

WHAT IS THIS FOR?

Customize the Internet links on the console so your exercisers can easily access popular Internet sites.

STEPS

1. Navigate to Equipment Settings tab
2. Select Console
3. Click on Internet Favorites tab
4. Enter the destination URL on the left column and the specific name that will appear on the console in the right column
5. Click Publish

OUTCOME

A list of internet links are published on the equipment

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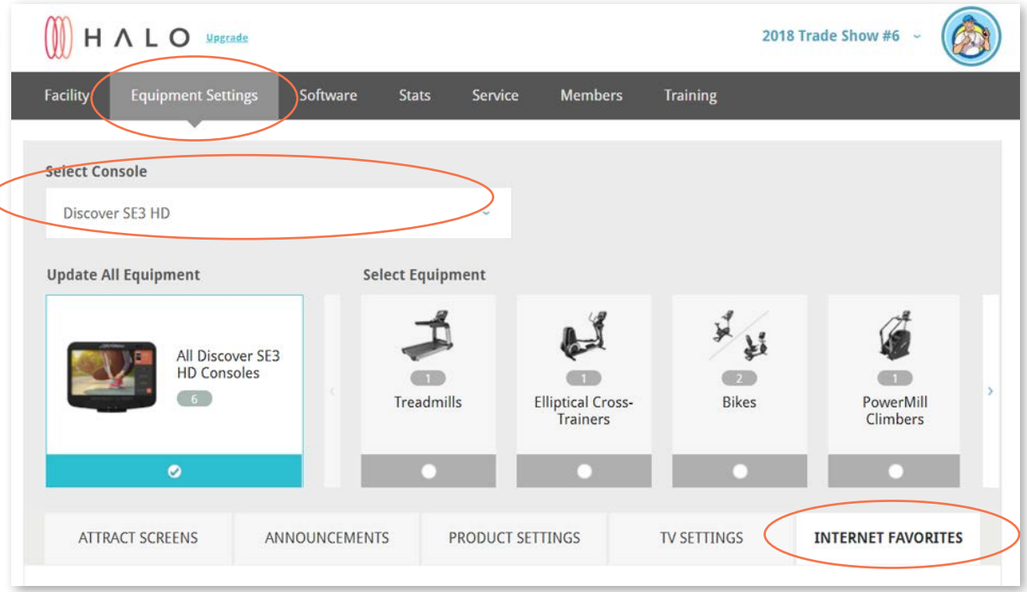

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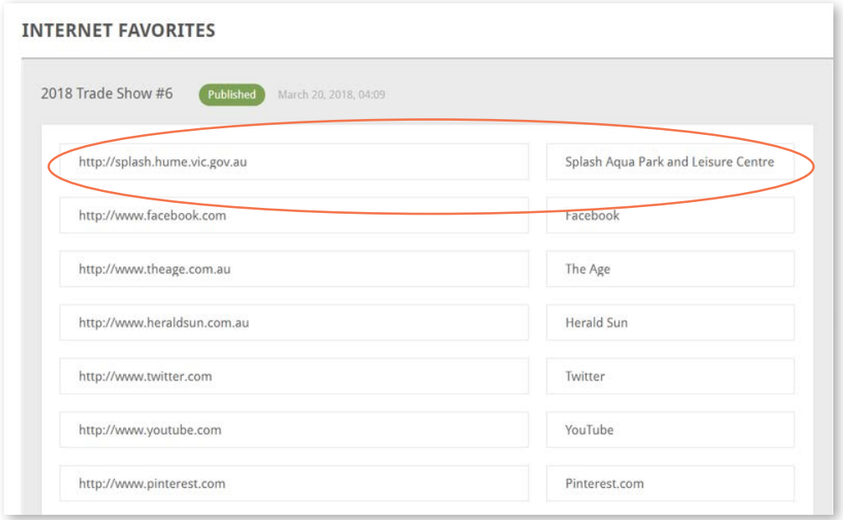

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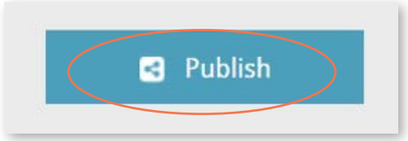

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EQUIPMENT MANAGEMENT

Equipment Type Settings – Product Settings

WHAT IS THIS FOR?

Customize the Product Settings to your preference and the preference of your exercisers. When selecting a specific equipment type, you can modify extra features related to that particular product.

STEPS

1. Navigate to Equipment Settings Tab
2. Select Console
3. Select Equipment
4. Click on Product Settings tab
5. Click on Add Product Setting
6. Enter a name for the new Product Setting
7. Select all the settings that apply
8. Click Publish

OUTCOME

A specific product setting is published to an Equipment Type

A new product setting is saved on the facility account

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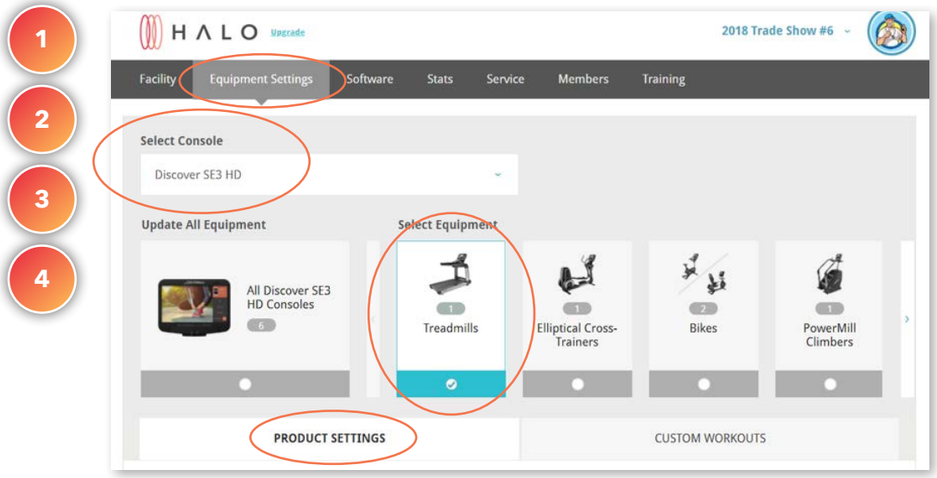

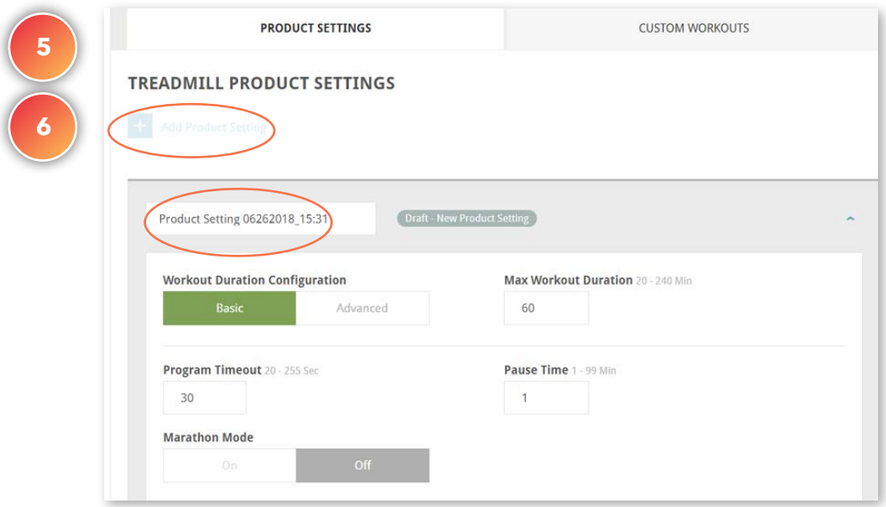

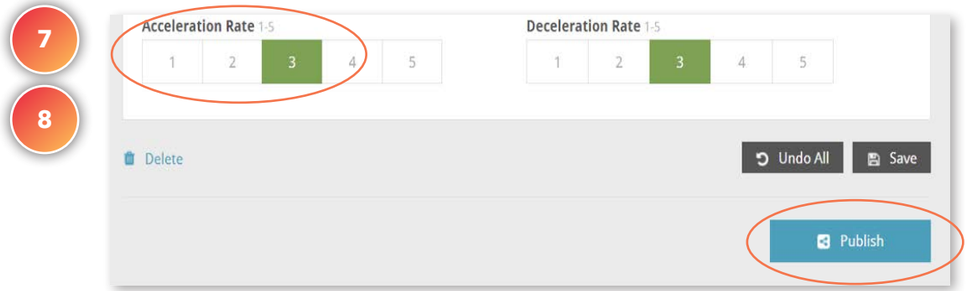

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EQUIPMENT MANAGEMENT

Equipment Type Settings – Custom Workout

WHAT IS THIS FOR?

You can create your own custom workouts and make them available to exercisers through the console.

STEPS

1. Navigate to Equipment Settings Tab
2. Select Console
3. Select Equipment
4. Click on Custom Workouts tab
5. Click on Add Custom Workout
6. Enter a name for the new Custom Workout
7. Click on Choose Workout to select a workout from user's library or to create one
8. Click Publish

OUTCOME

A new custom workout is published on the equipment

A new customer workout set is saved on the facility account

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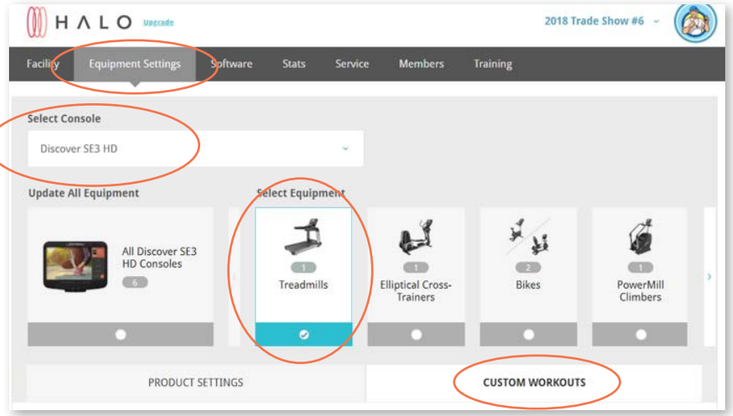

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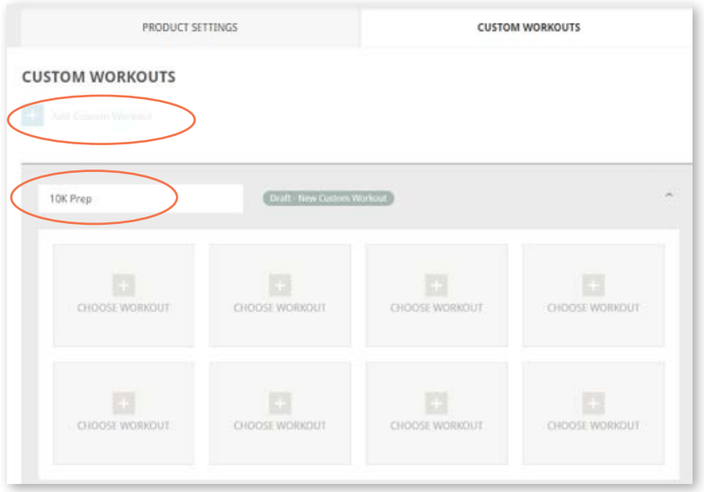

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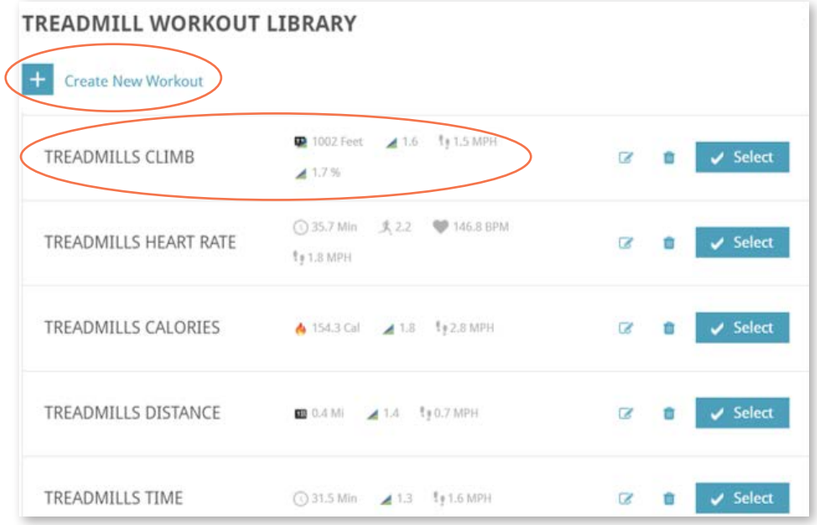

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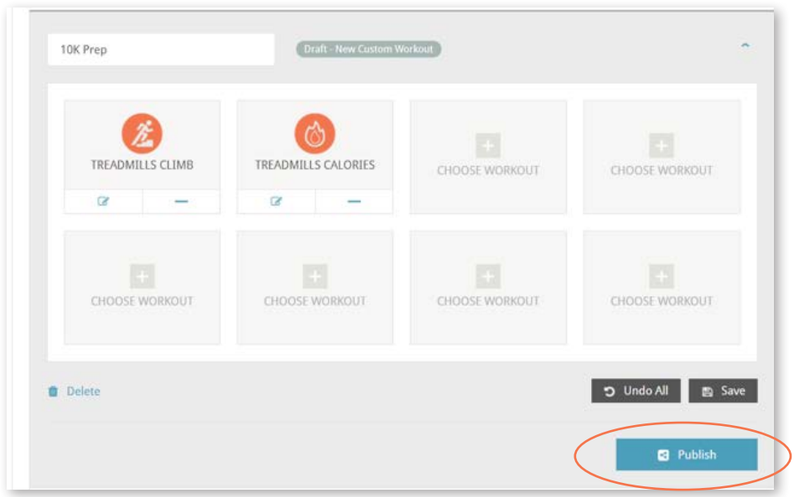

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EQUIPMENT MANAGEMENT

Equipment Type Settings – Performance Run (Discover SE3 HD or ST only)

WHAT IS THIS FOR?

Change the interface of your treadmill consoles to make it easy for exercisers to change the speed and incline for both high-intensity interval training and lower intensity intervals. Create specific workouts for individuals or group workouts by customizing the speed and incline settings.

STEPS

1. Navigate to Equipment Settings Tab
2. Select Discover SE3HD or ST Console
3. Select Treadmills
4. Click on Performance Run tab
5. Select Enable (or disable to remove from displaying)
6. Select the 6 or 10 layout option
7. Set the numbers for both incline and speed (if using the default numbers, keep as is)
8. Click Choose Equipment
9. Select which treadmills to apply Performance Run to
10. Click Publish

OUTCOME

Performance Run view is enabled on selected treadmills

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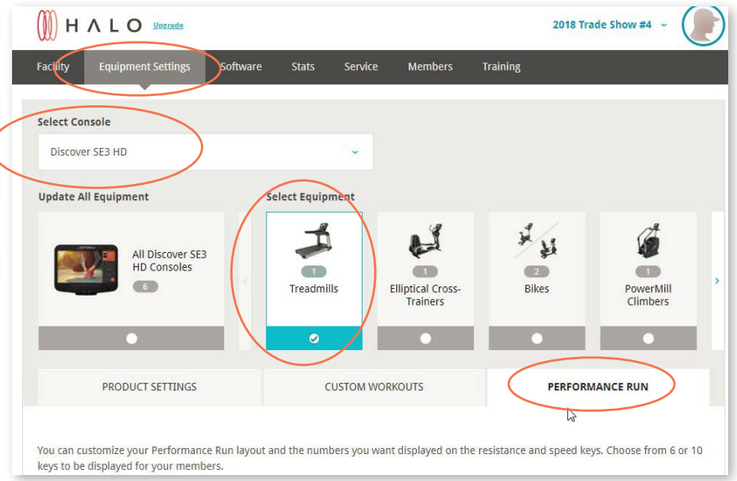

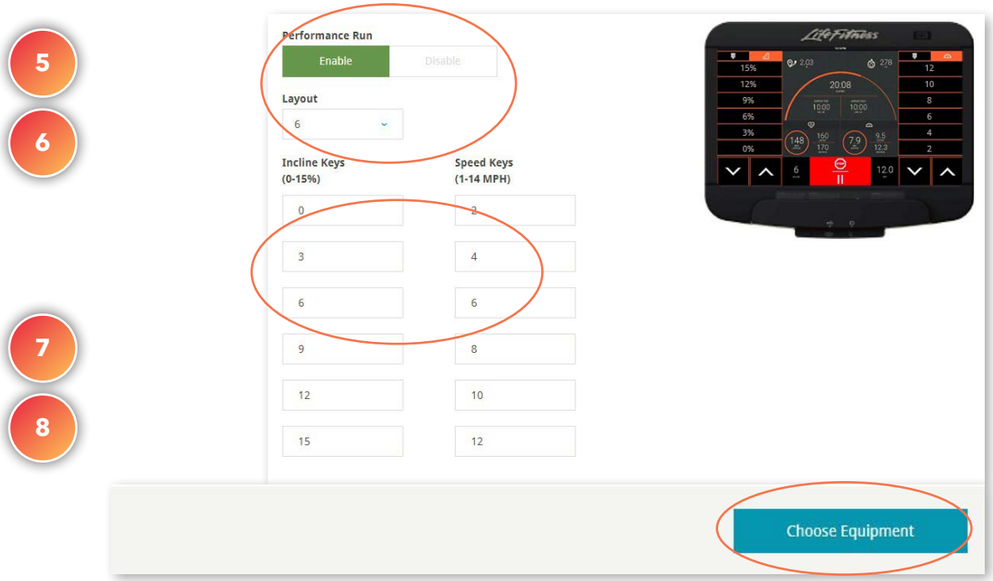

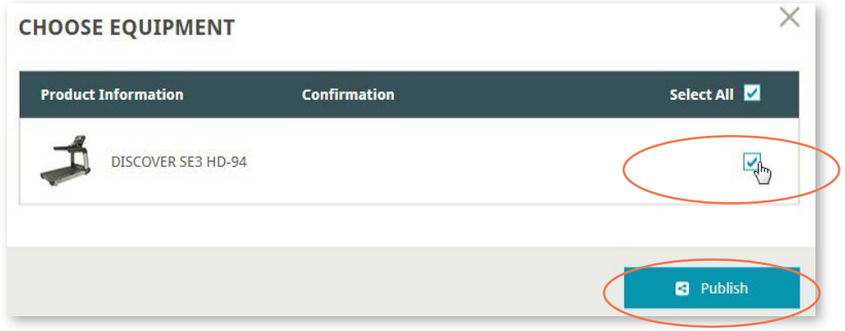

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EQUIPMENT MANAGEMENT

Remote Software Updates

WHAT IS THIS FOR?

Keep your equipment up to date with the latest console software versions without having to think about it. Turn on remote updates for your machines to automatically download the newest console software as soon as it comes out.

STEPS

1. Navigate to Software Tab
2. Select Console
3. Click on Remote Updates tab
4. Click Auto Update button to turn on/off the automatic updates
5. If Auto Update is set to off, schedule the update
6. Choose the day and time for the update to occur
7. Confirm the date by choosing Yes

OUTCOME

Update method is selected: automatic or using the scheduler

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AUTO UPDATE: ON

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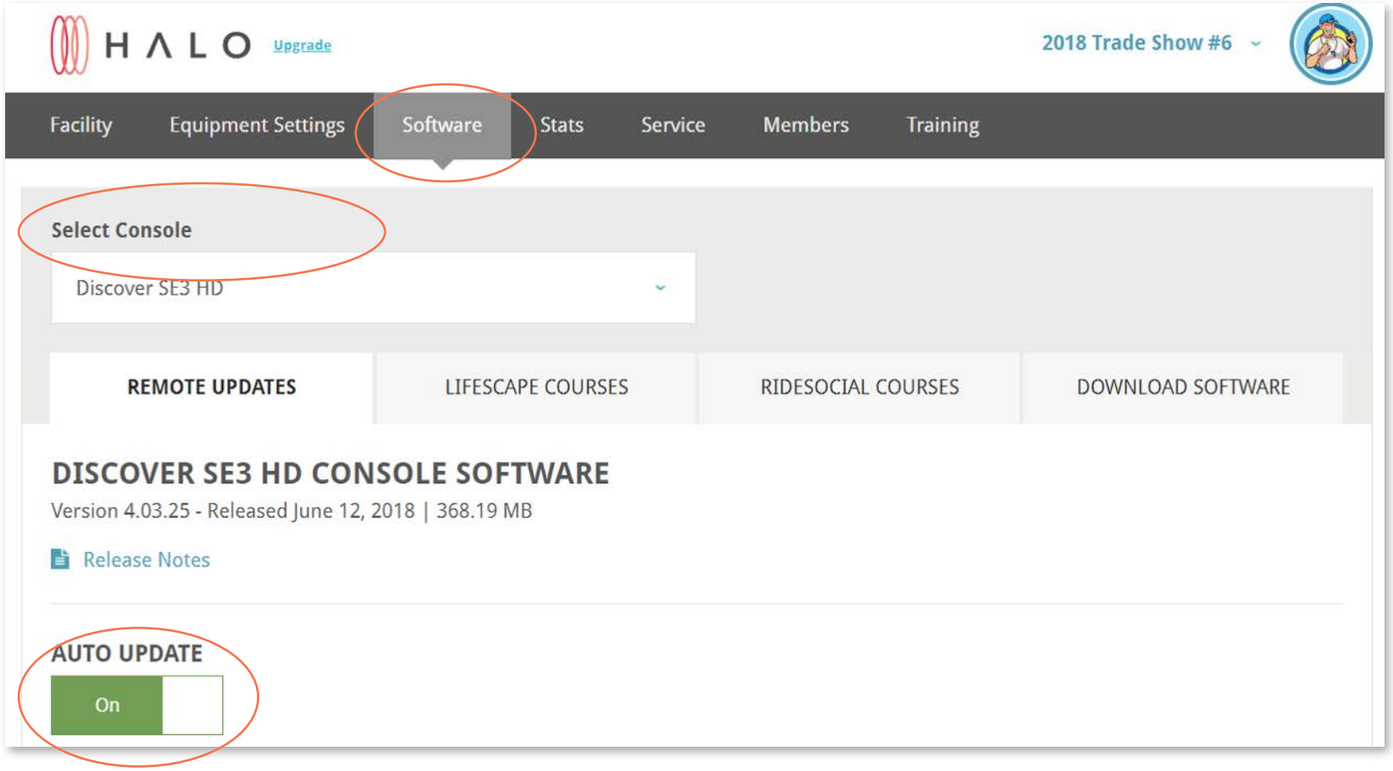

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AUTO UPDATE: OFF

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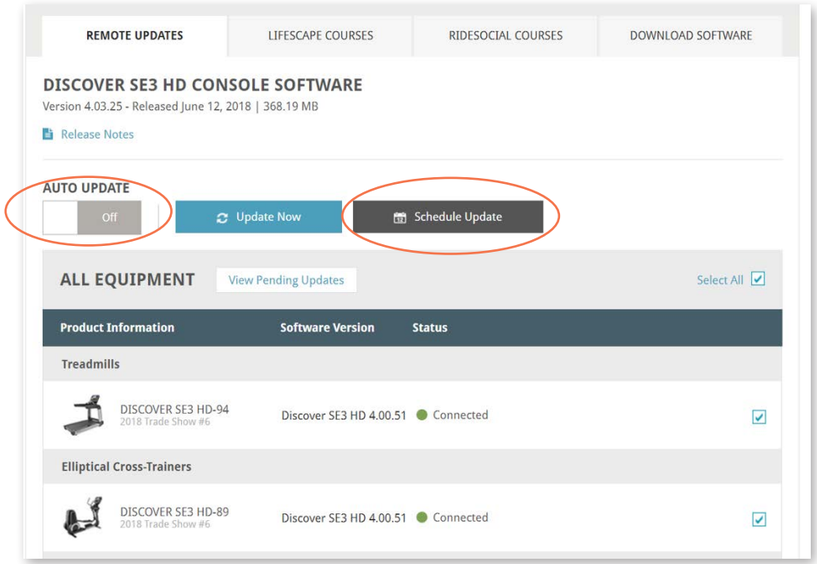

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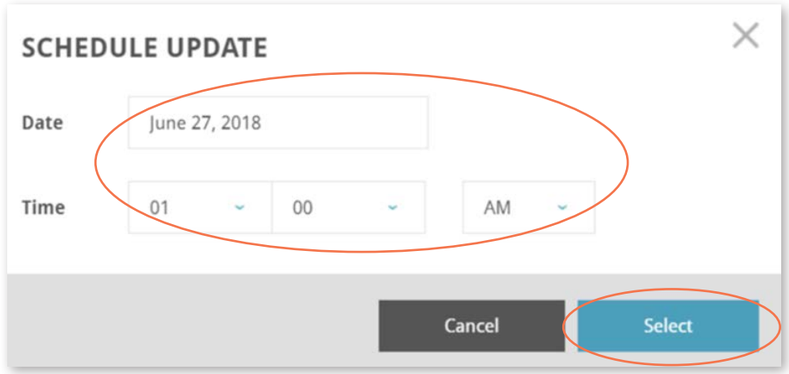

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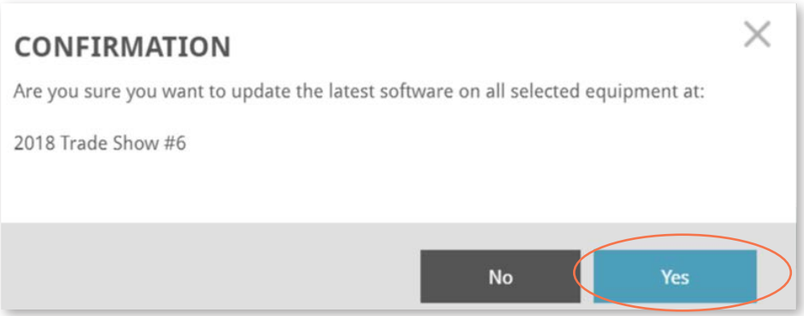

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EQUIPMENT MANAGEMENT

Update Lifescape Courses

WHAT IS THIS FOR?

Interactive and virtual courses are a popular choice for your exercisers who want to immerse themselves in an interactive environment. Keep your consoles updated with the latest courses for more variety.

STEPS

1. Navigate to Software Tab
2. Select Console
3. Click on Lifescape Courses tab
4. Download the desired course update and follow the instructions to update the equipment

OUTCOME

New courses are loaded on the selected consoles

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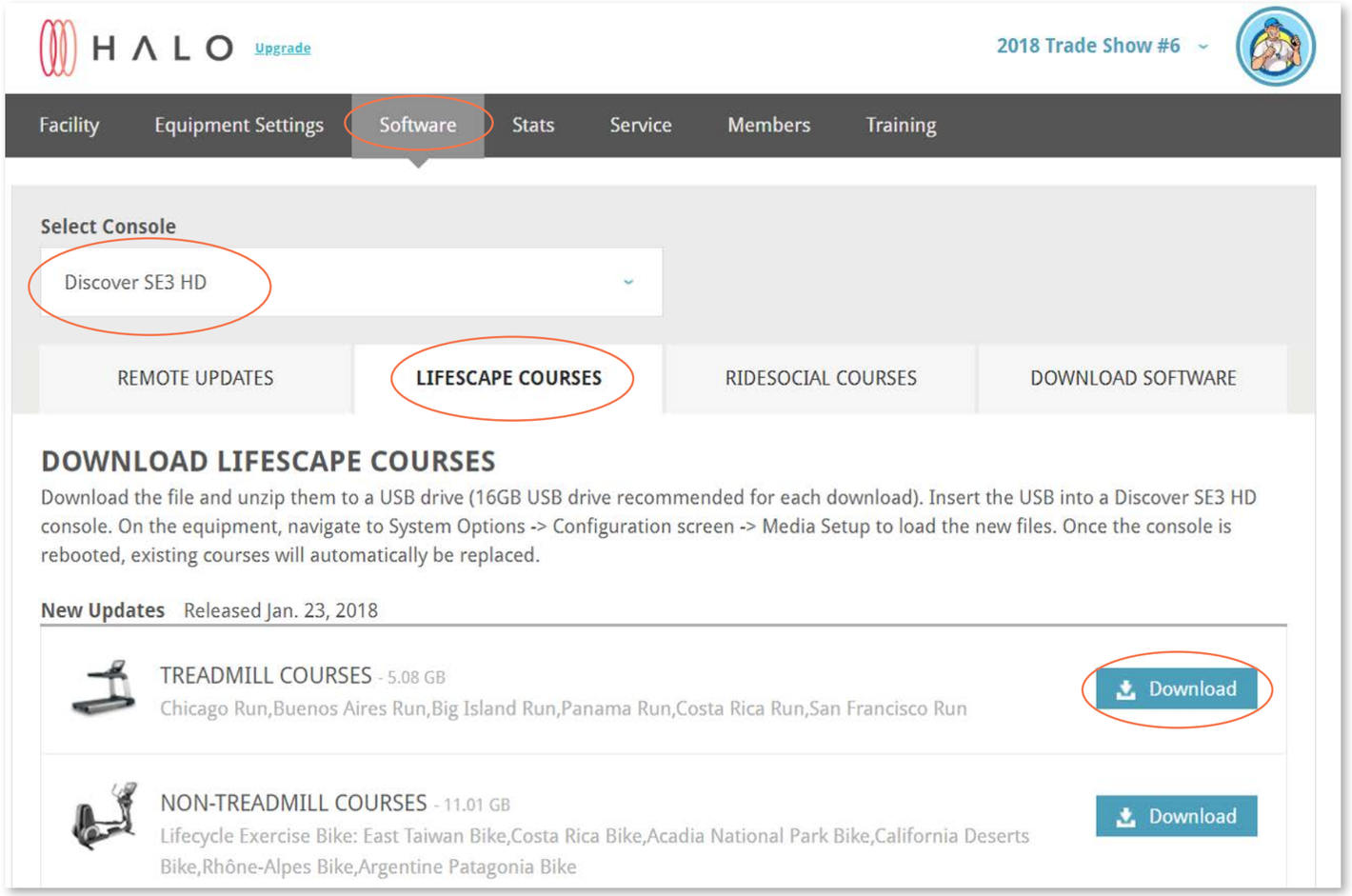

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EQUIPMENT MANAGEMENT

Update Ridesocial Courses

WHAT IS THIS FOR?

Ridesocial courses are available on both recumbent and upright bike consoles to offer exercisers new entertainment options while riding.

STEPS

1. Navigate to Software Tab
2. Select Console
3. Click on Ridesocial Courses tab
4. Download the desired course update and follow the instructions to update the equipment

OUTCOME

Ridesocial courses are loaded on the selected consoles

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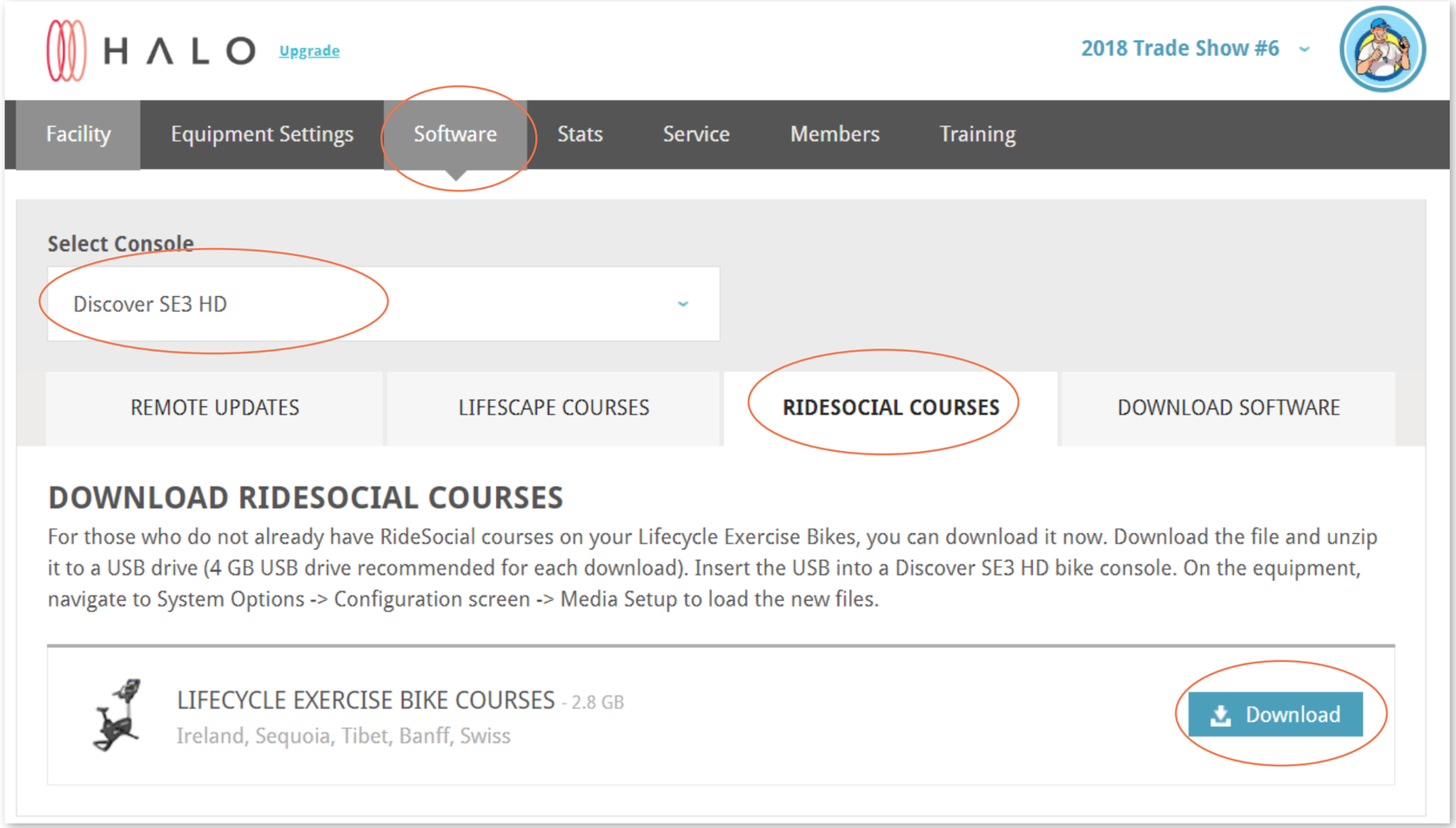

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EQUIPMENT MANAGEMENT

Download and Update Software

WHAT IS THIS FOR?

Console software updates can also be uploaded manually if needed.

STEPS

1. Navigate to Software Tab
2. Click on Download Software tab
3. Download the desired console software to USB
4. Update and follow the instructions to update the equipment

OUTCOME

Manual software update is performed

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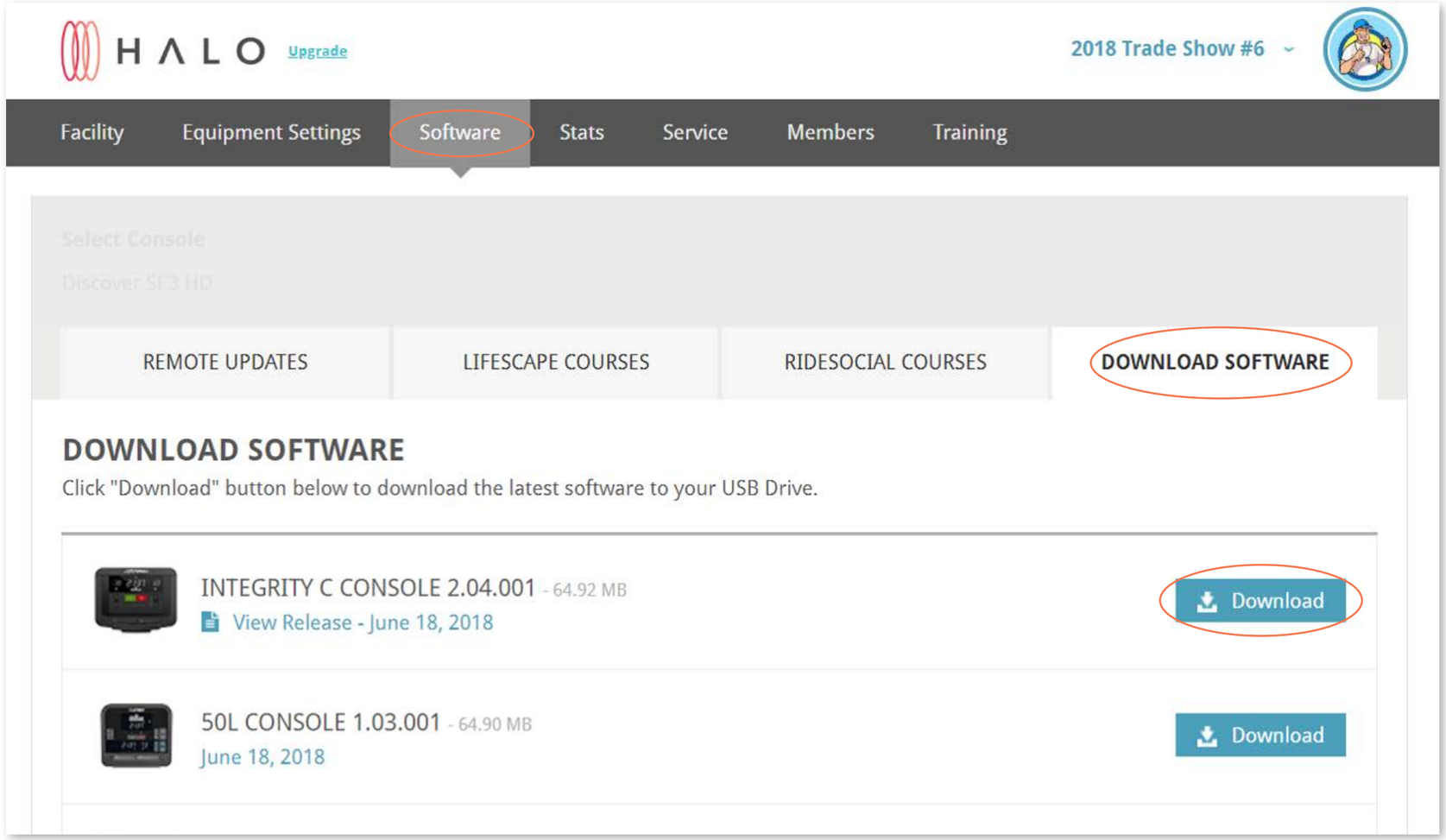

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EQUIPMENT MANAGEMENT

Usage Statistics

WHAT IS THIS FOR?

Know when your equipment is most frequently used. Plan rotations and preventive maintenance to extend the life your equipment.

STEPS

1. Click on the Stats tab
2. Scroll down to review equipment usage statistics
3. View equipment by utilization (in use) or dormancy (inactive)
4. View equipment usage by day, by time, by equipment, by distance and by workouts
5. View detailed view by equipment type: Connected, Idle or Service notifications

OUTCOME

Equipment's usage statistics are reviewed

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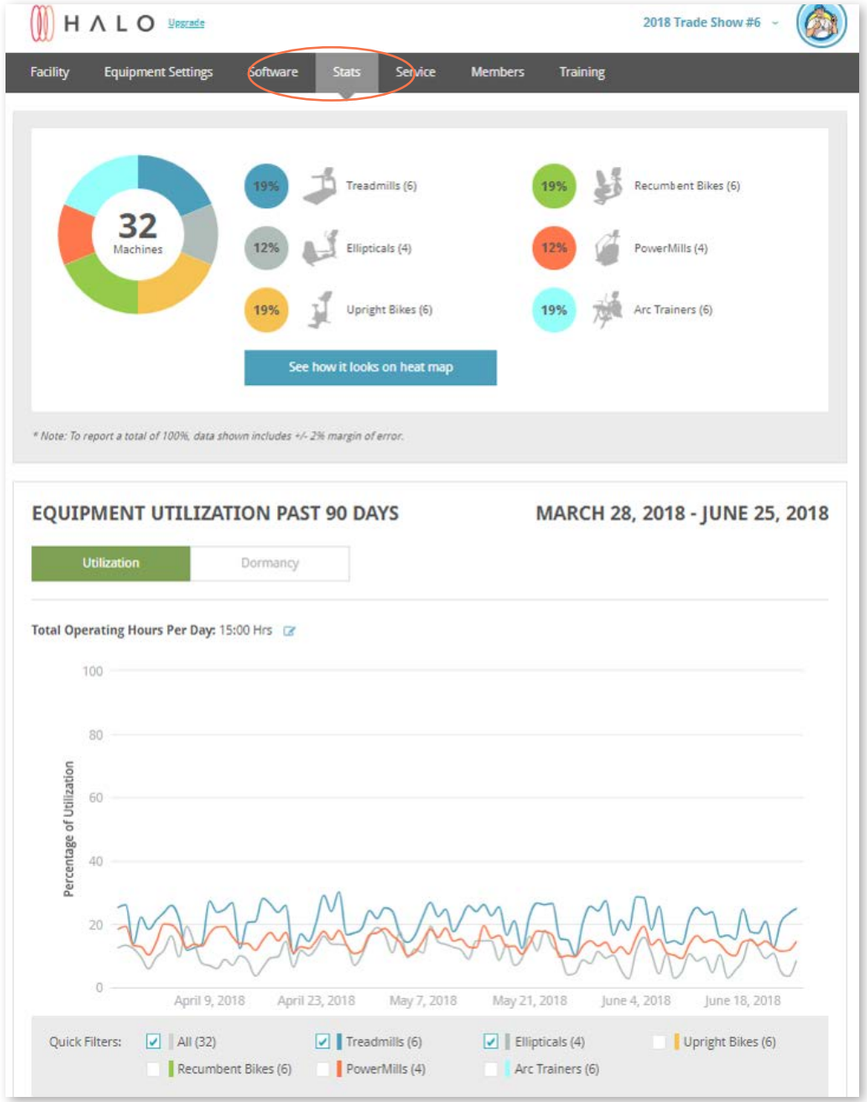

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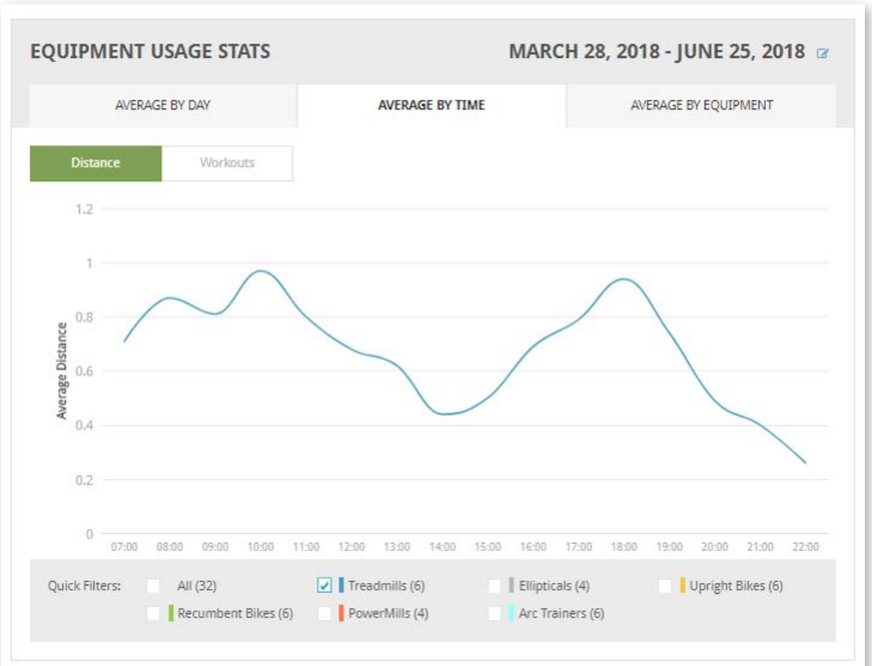

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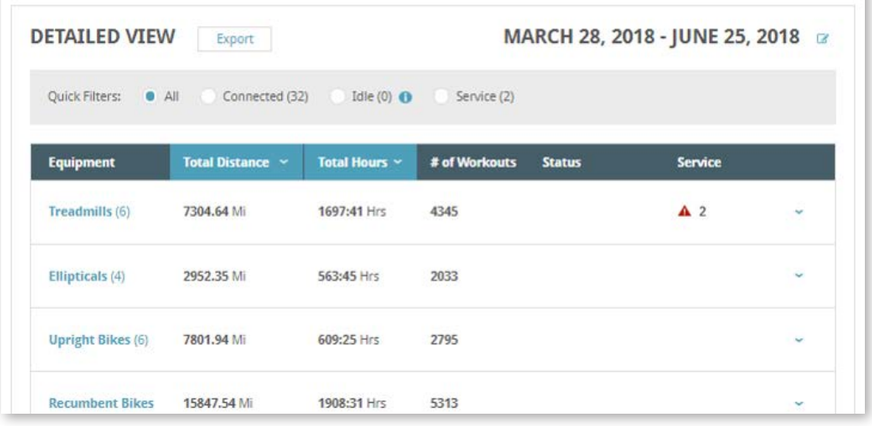

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SERVICE & MAINTENANCE

Equipment Rotations

WHAT IS THIS FOR?

Equipment Rotation notifications are refreshed every Sunday, and will display all equipment recommended to be rotated based on the highest and lowest used equipment on your facility floor.

STEPS

1. Click on the Service tab
2. Select Equipment
3. Click on the Equipment Rotations tab
4. Navigate thru the list to review the proposed equipment rotations
5. Once a rotation is completed, click on the Complete button
6. Click on Dismiss if the proposed rotation is not needed

OUTCOME

Proposed equipment rotations reviewed and action is taken

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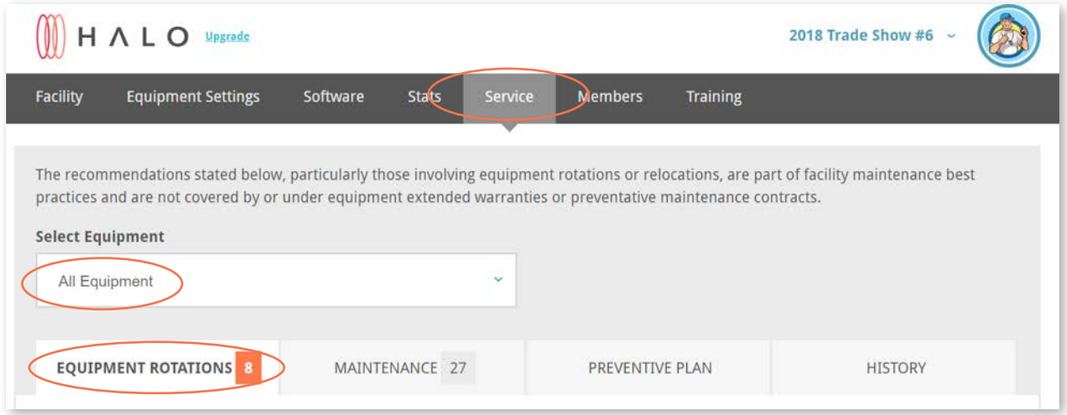

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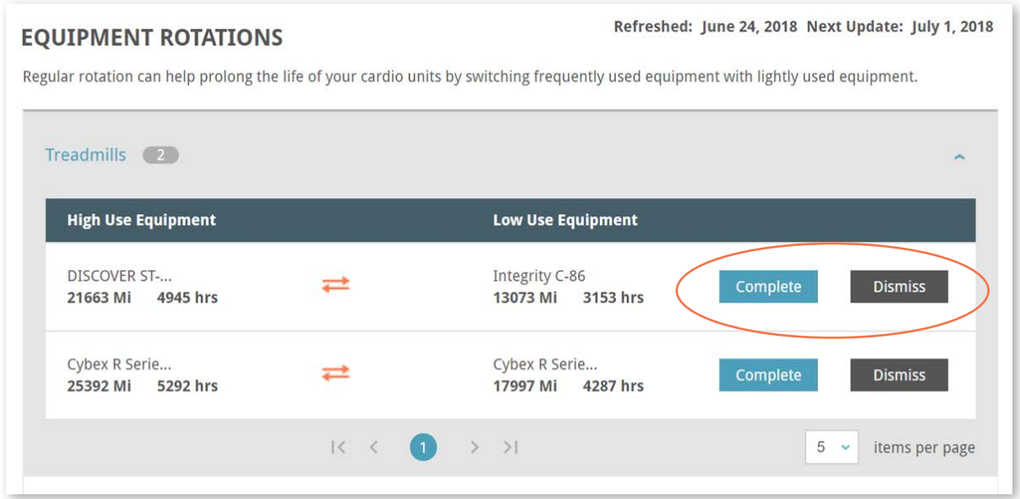

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SERVICE & MAINTENANCE

Equipment Maintenance

WHAT'S THIS FOR?

Know when your equipment is most frequently used. Maintenance information is refreshed daily, and will display all the treadmills requiring a belt inspection.

STEPS

1. Click on the Service tab
2. Click on the Maintenance tab
3. Navigate through the list to review pending maintenance tasks
4. Once the maintenance task is completed, click on the Complete button
5. Click on Dismiss is the proposed task is not needed

OUTCOME

Proposed maintenance reviewed

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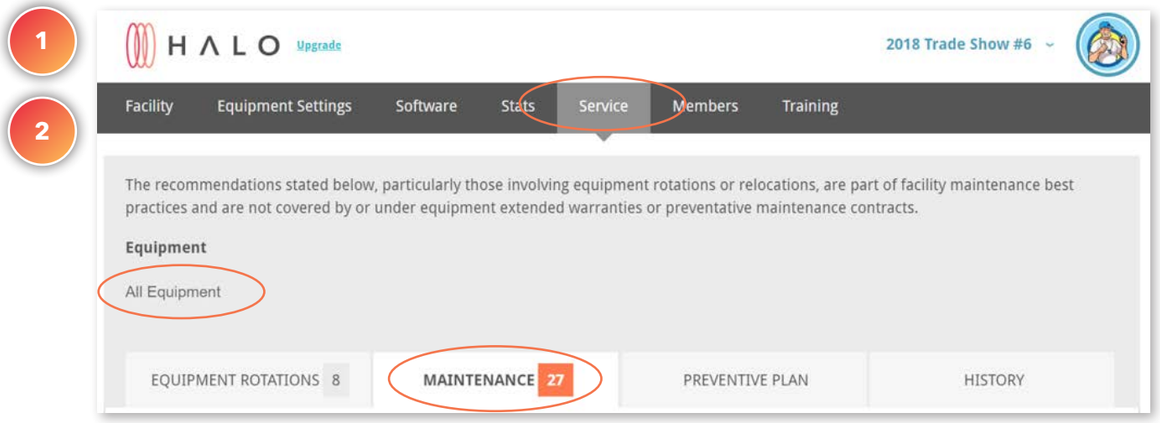

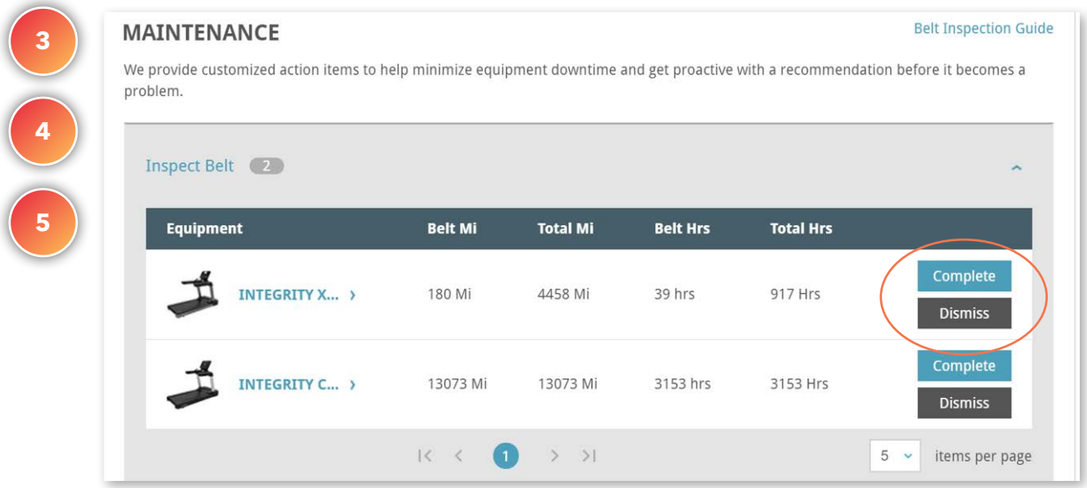

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SERVICE & MAINTENANCE

Preventive Plan

WHAT'S THIS FOR?

Extend the life of your equipment by setting up preventive plan tasks and assigning to Staff can create a preventive plan to extend the life of the equipment.

STEPS

1. Click on the Service tab
2. Click on the Preventive tab
3. Click on Add Preventive Plan
4. Select Equipment
5. Select staff, frequency and maintenance tasks
6. Review
7. Create Plan

OUTCOME

A new preventive plan is created

Have other equipment you want to set up preventive plan tasks for?

Check out the custom schedule tool that comes with Job Tracker >

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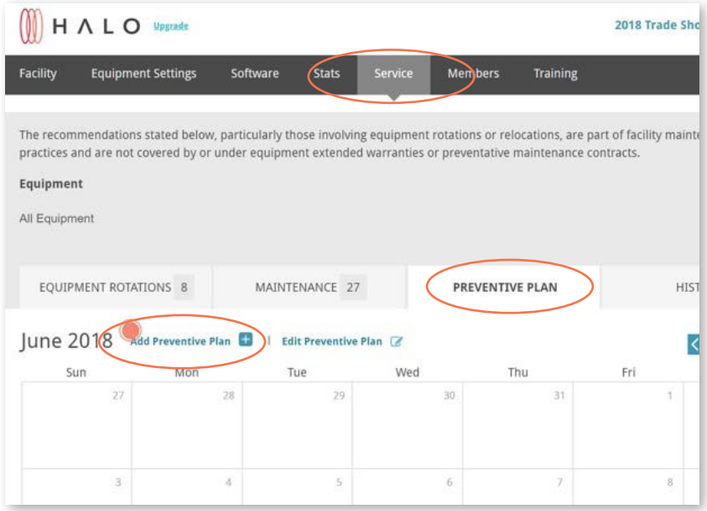

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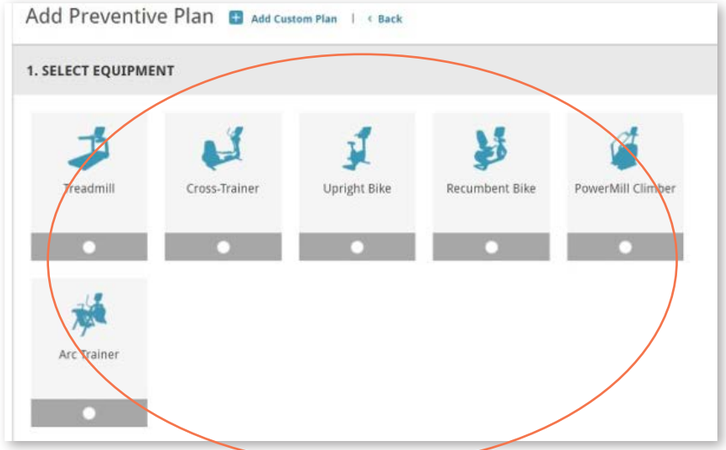

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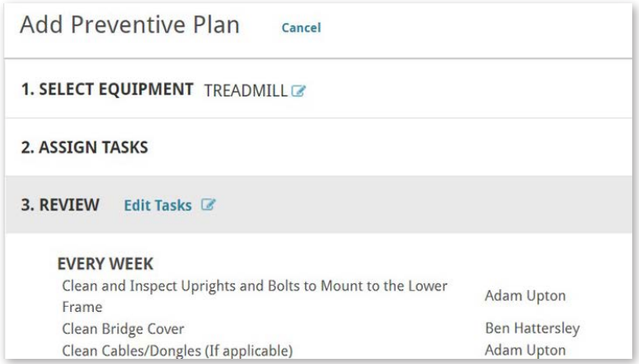

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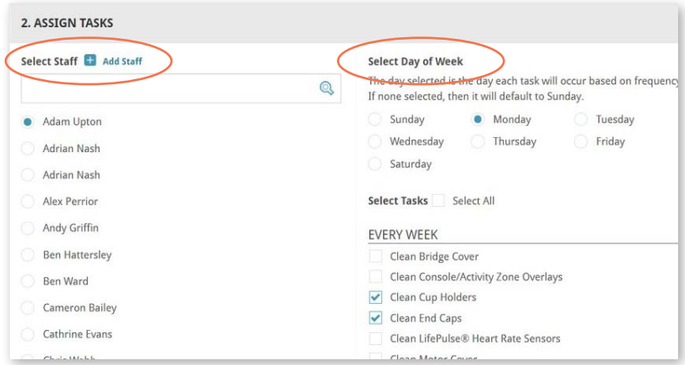

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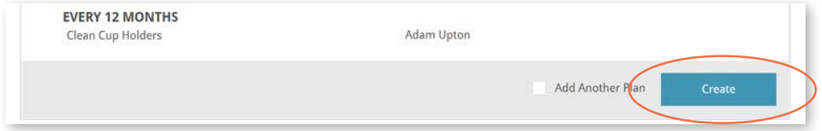

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SERVICE & MAINTENANCE

History

WHAT'S THIS FOR?

View the all the equipment rotation, maintenance and job tracker records completed for the last year.

STEPS

1. Click on the Service tab
2. Click on the History tab
3. Navigate through the list to review the history of equipment rotations and maintenance tasks

OUTCOME

Maintenance history reviewed

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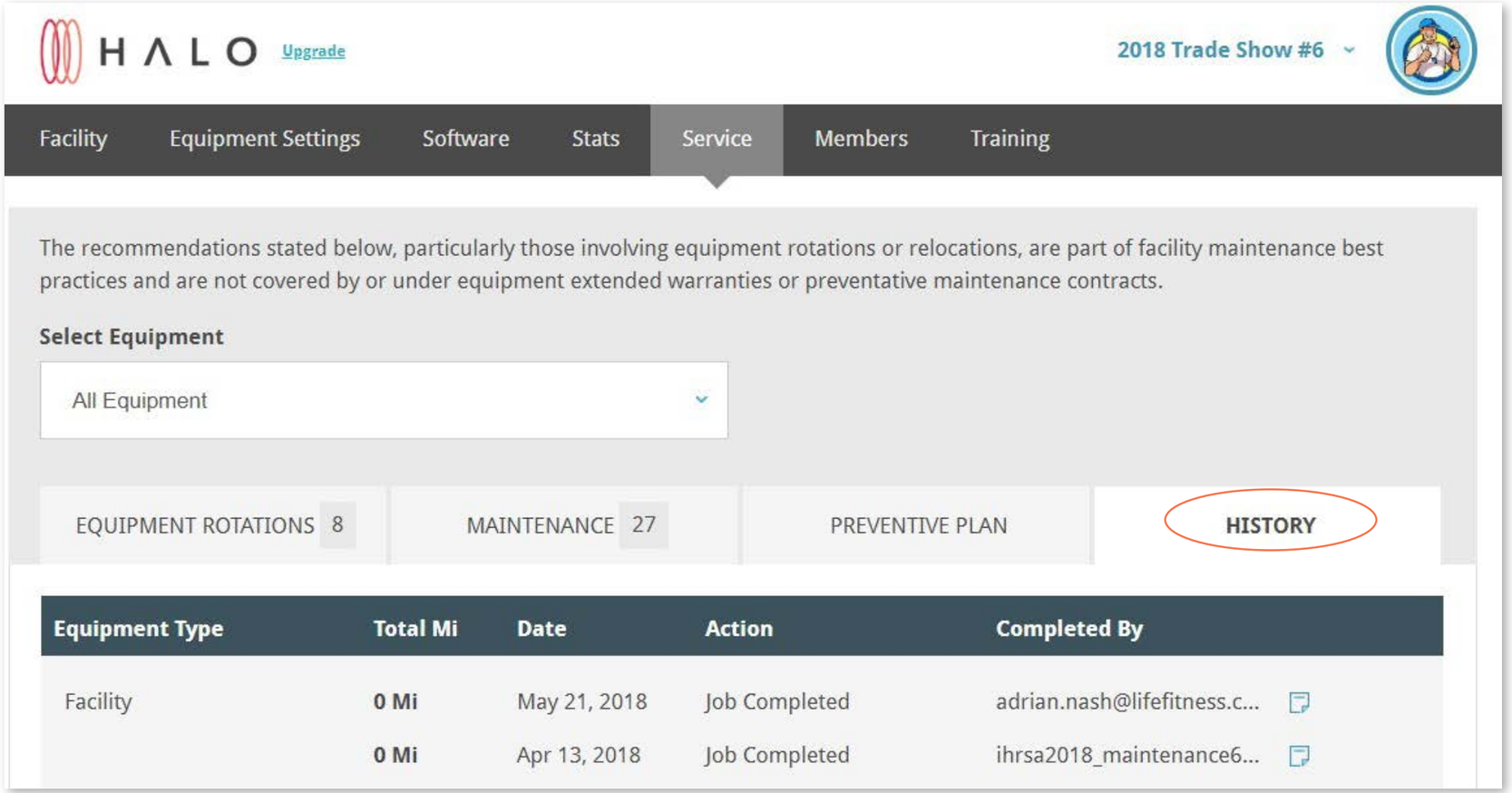

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CORE PLAN

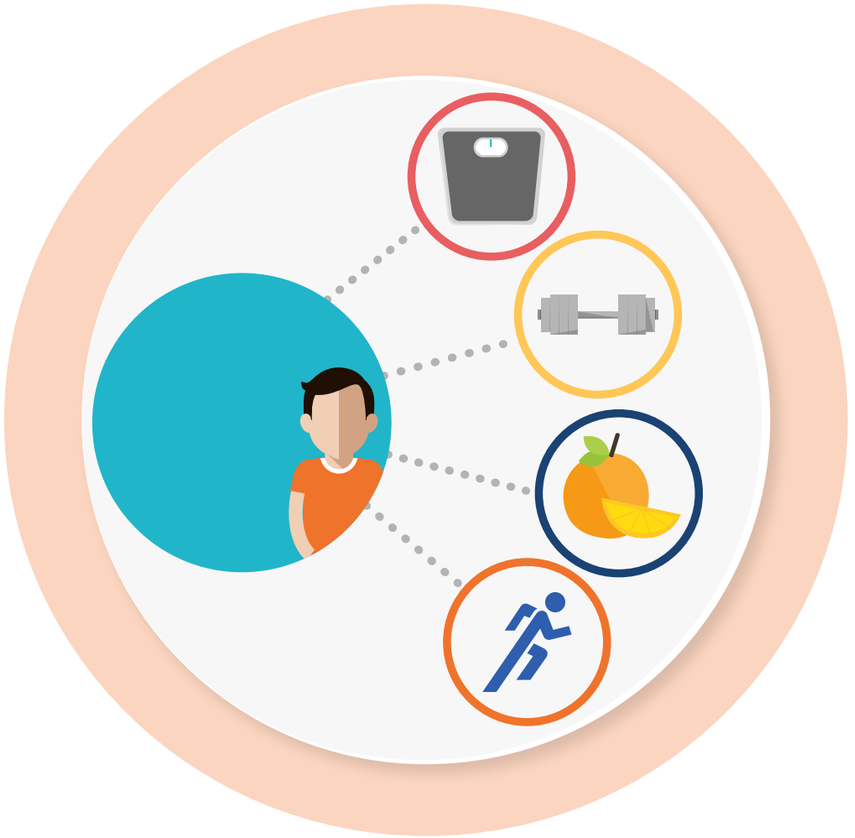
The following functionalities are included in the Core Plan, in addition to the Standard Plan features.

MEMBERSHIP

- Add and edit profiles of current and former members
- View member profiles to understand behavior

FACILITY & STAFF UPDATE

- Customize facility's branding



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MEMBERSHIP

Add a Member

WHAT'S THIS FOR?

You can add all your members to create and edit exerciser profiles. View the individual profiles to understand member goals.

STEPS

1. Navigate to Members Tab
2. Click on Manage Tab
3. Click on Add Members
4. Complete all the mandatory fields
5. Click Add Member

OUTCOME

- A new member is added
- Member receives an email with login information

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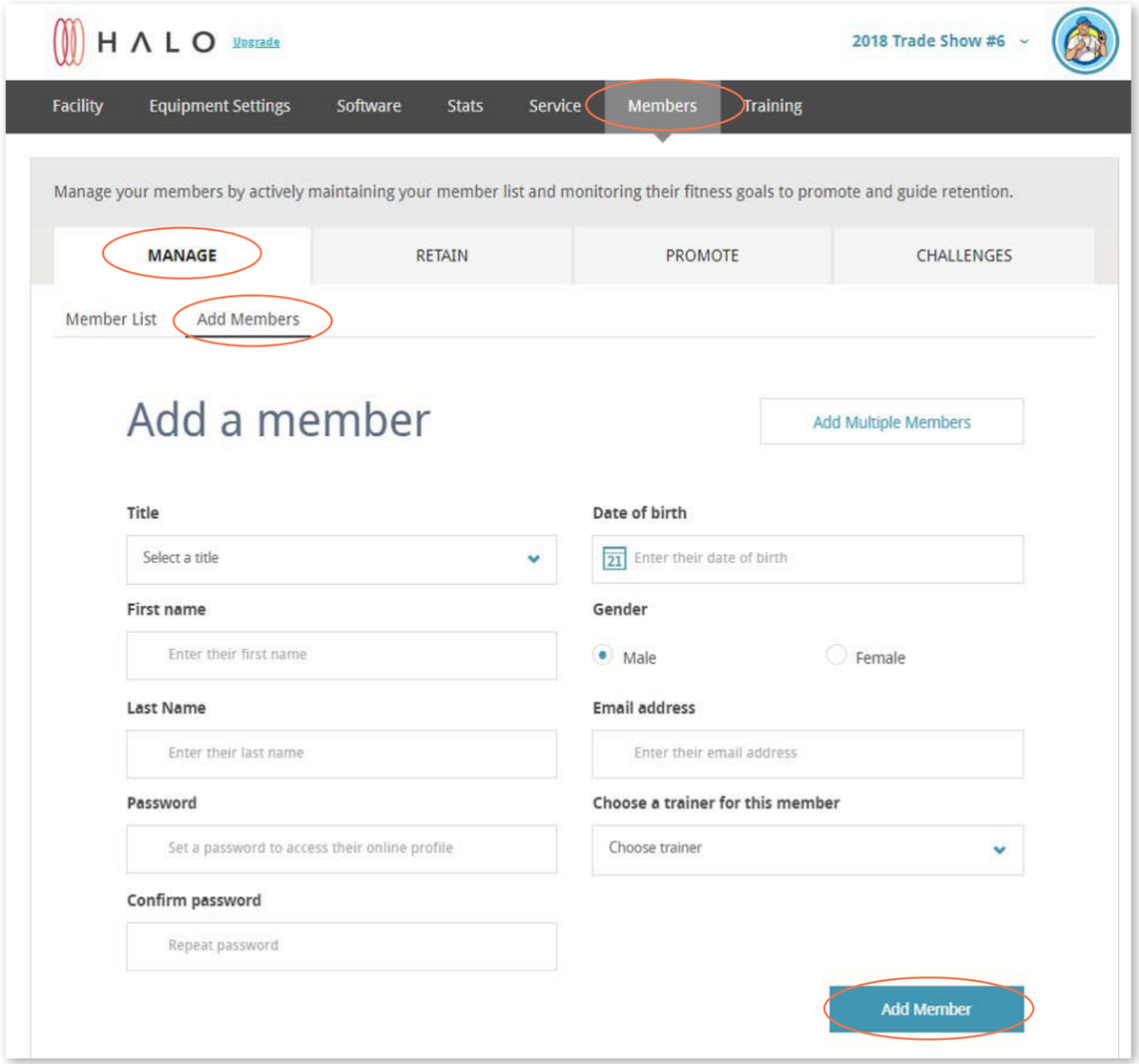

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MEMBERSHIP

View and Edit Member Profiles

WHAT'S THIS FOR?

View a member's profile to review your member's behavior and goals.

STEPS

1. Navigate to Members tab
2. Click on Manage tab
3. Click on Member List
4. Click on the manage icon to access to the view profile link
5. Click on edit profile to update member's profile

OUTCOME

Member's profile reviewed and updated

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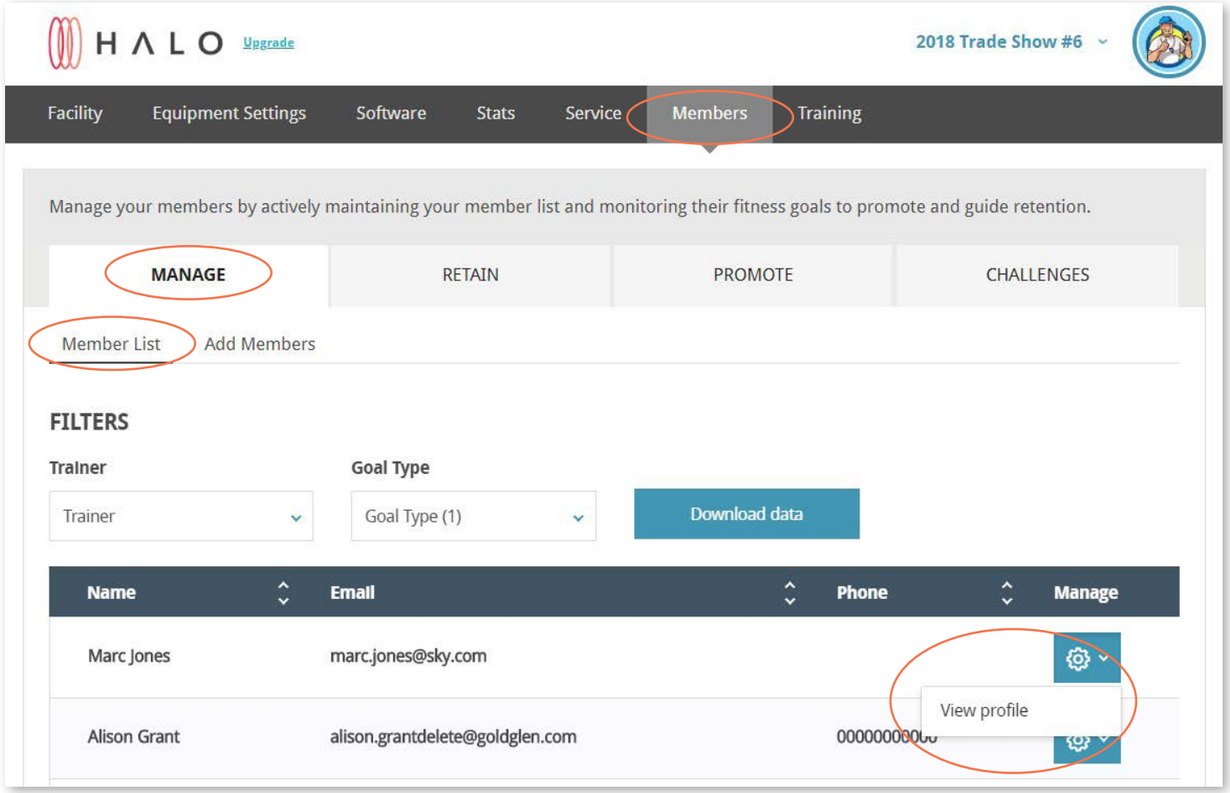

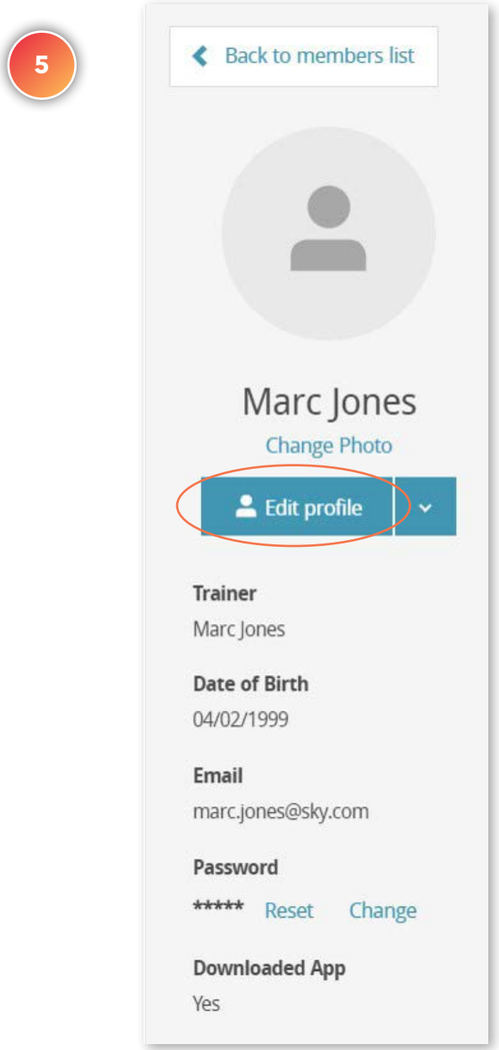

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FACILITY & STAFF UPDATE

Branding

WHAT'S THIS FOR?

Halo Fitness Cloud can be customized with your facility's colors and logo.

STEPS

1. Navigate to Facility tab
2. Click on Branding tab
3. Upload Logo and select the desired colors
4. Click Apply

OUTCOME

Logo and colors are submitted to customize the platform

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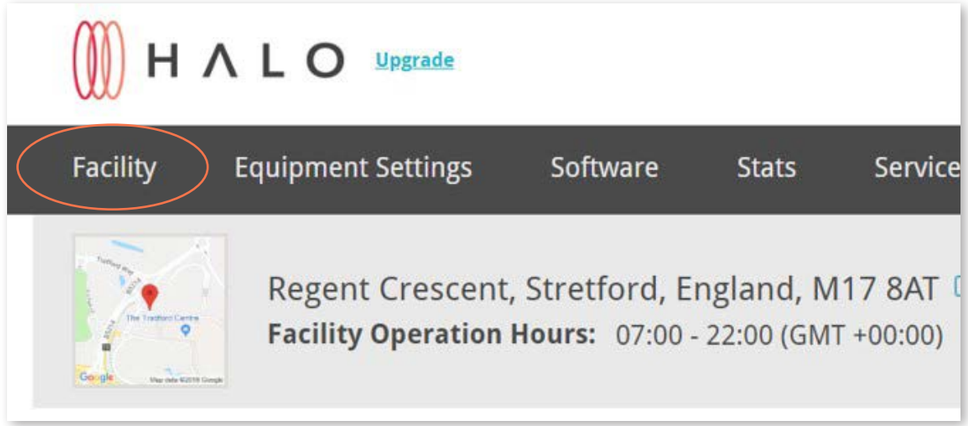

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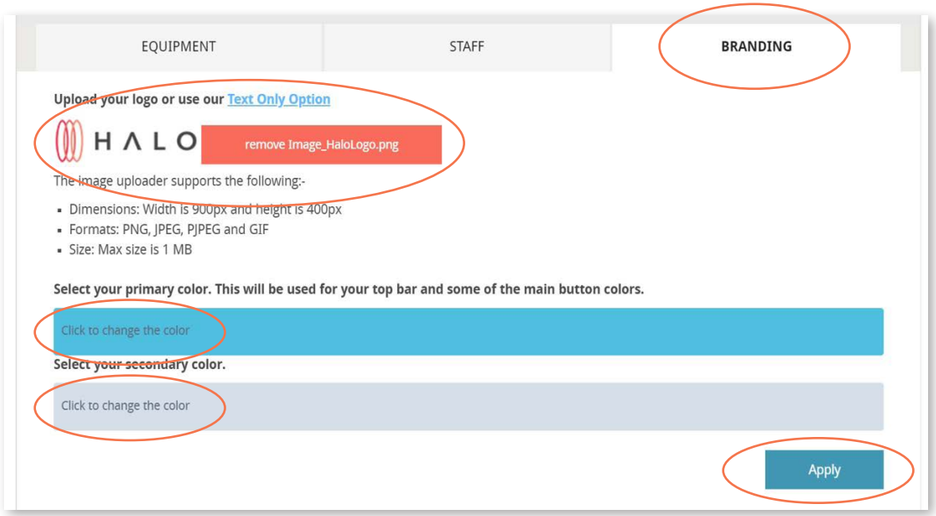

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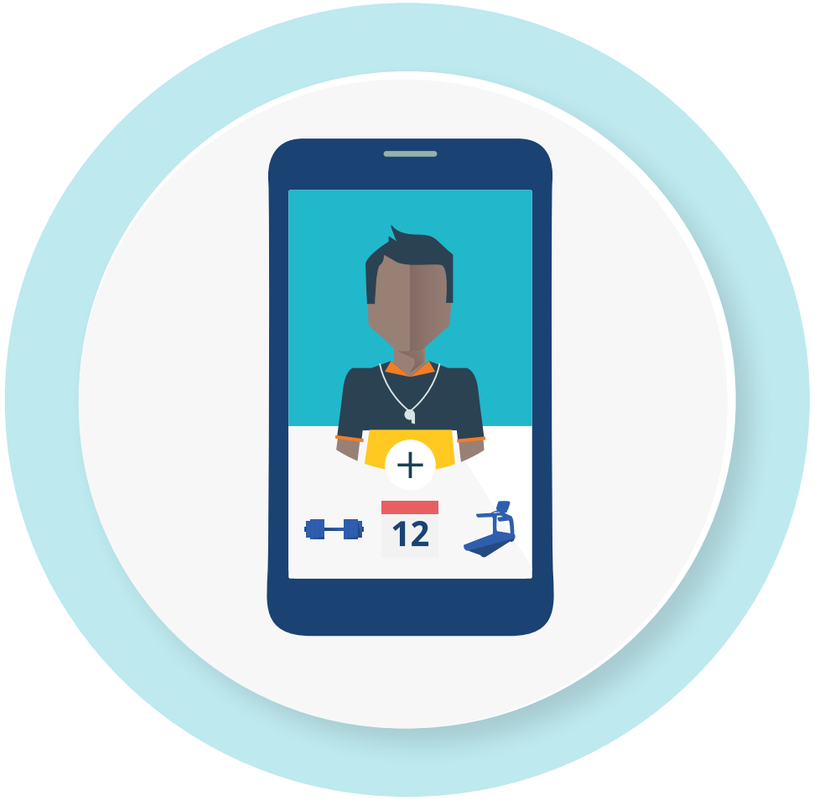
TRAIN PLAN

The following functionalities are included on the Train Plan (in addition to Standard and Core Plan features).

TRAINING PROGRAMS & CLASSES

- Personal Training
  - Workout creation
  - Send personalized workouts directly to clients
  - Create and add exercises to the workout library
  - Two-way interaction through the app between trainer and client
- Group Classes & Scheduling
  - Class Setup
  - Location Setup
  - Class Scheduling



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TRAINING PROGRAM & CLASSES

Personal Trainer/Staff Workout Creation

WHAT'S THIS FOR?

The training plan builder allows your staff to create personalized training plans to send to your members, monitor their progress and encourage them along the way to help them achieve their goals.

STEPS

1. Navigate to Training Tab
2. Click on the Programs Tab
3. Click on Workouts Tab
4. Click on Create New Training
5. Enter in the plan details and click Next
6. Select the exercises using the filters on the left
7. Set the targets (reps, sets, etc.) and click Add an Exercise
8. When plan is complete, click on Save and Next
9. Select Members to send the plan > click Next > click Send

OUTCOME

- A new workout plan is created and sent to a member
- A new workout plan is added to trainer's personal list

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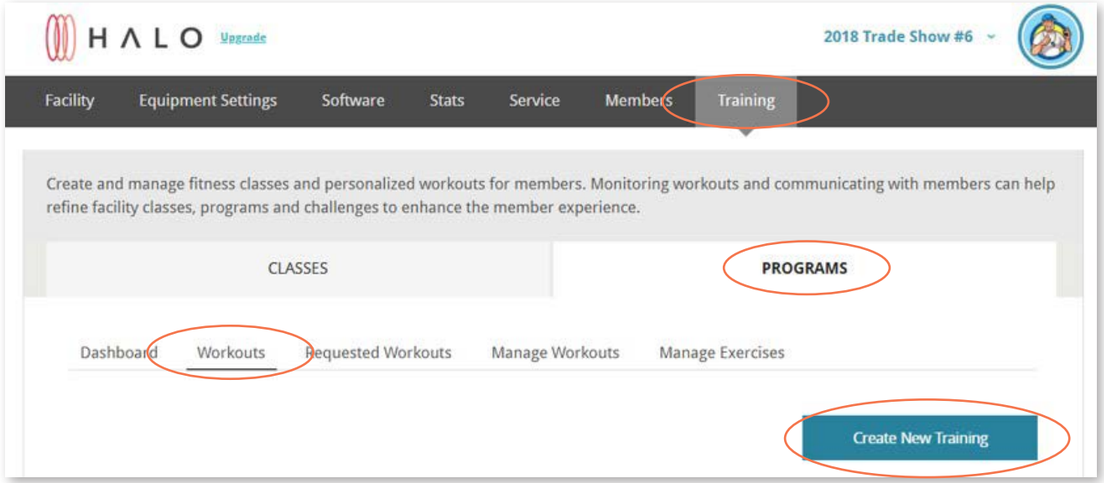

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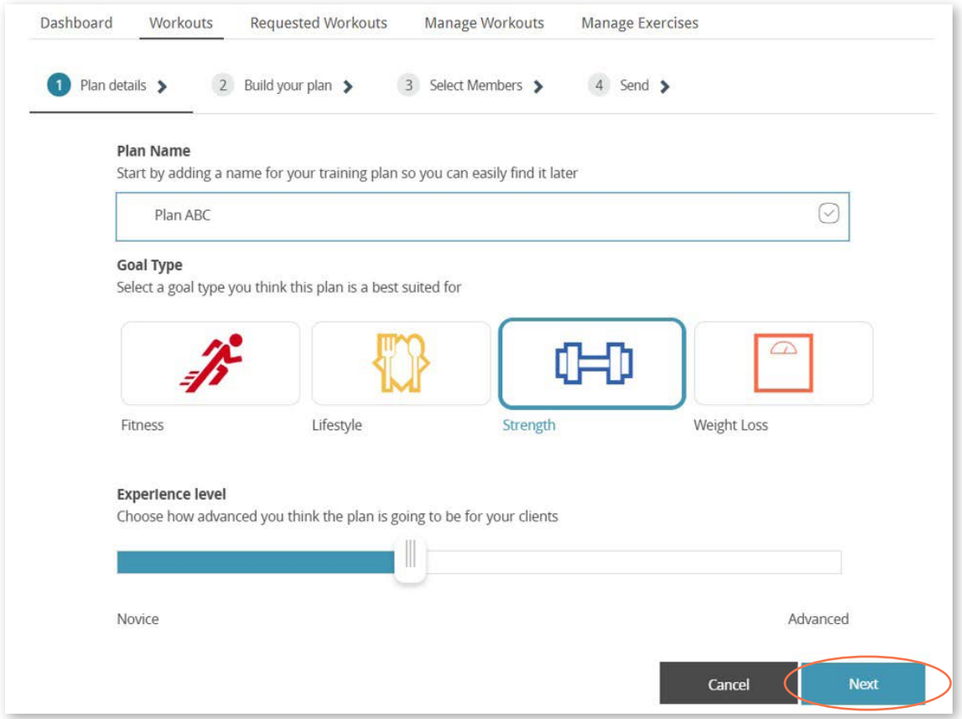

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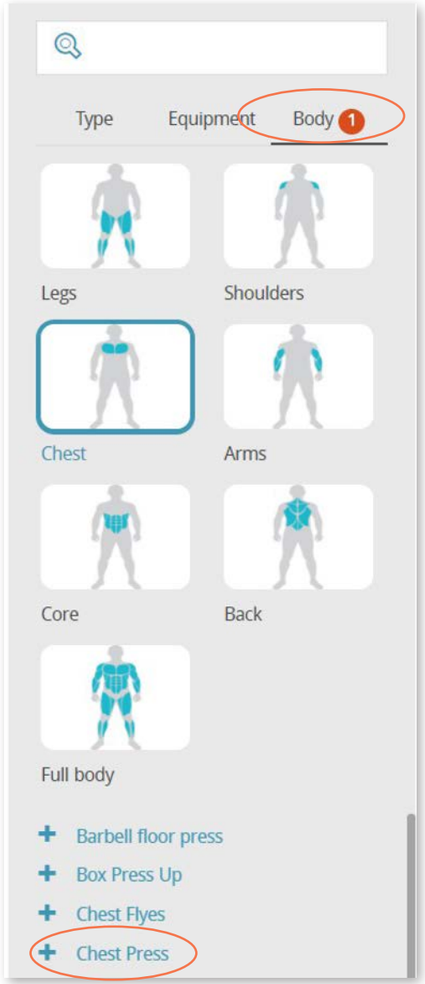

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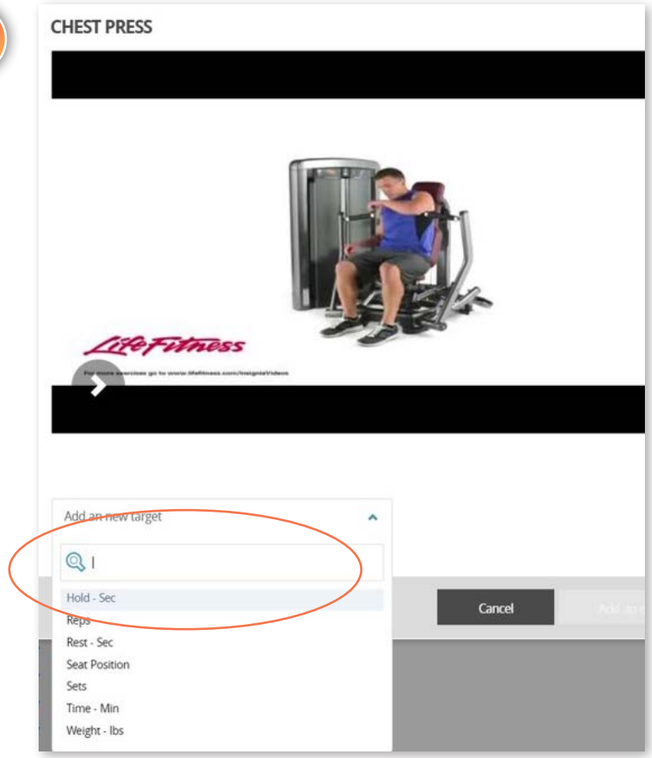

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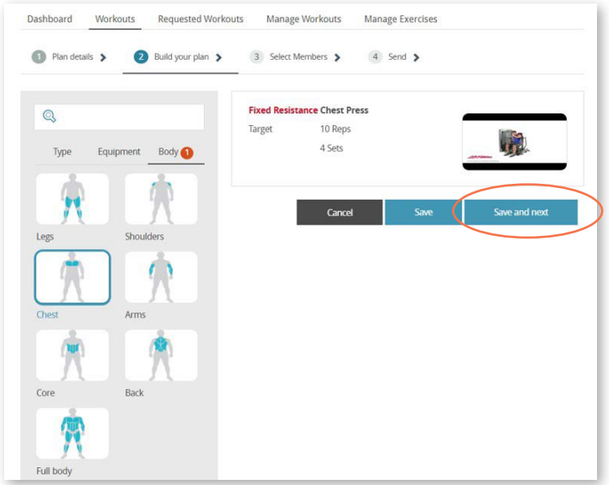

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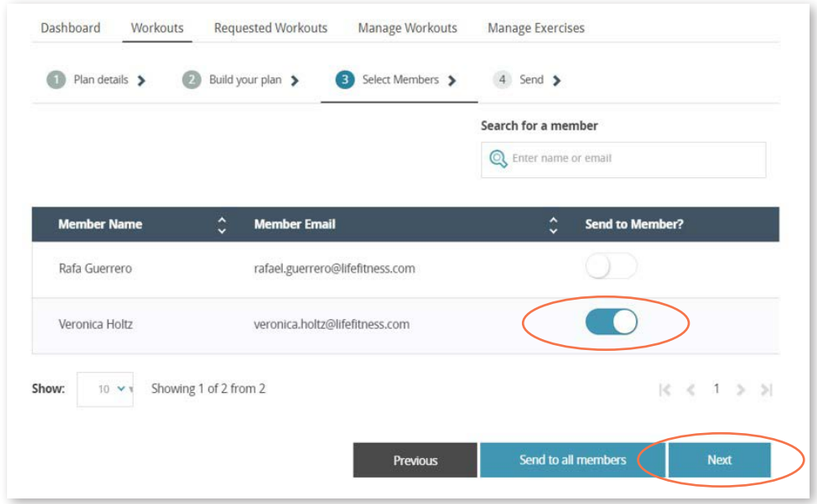

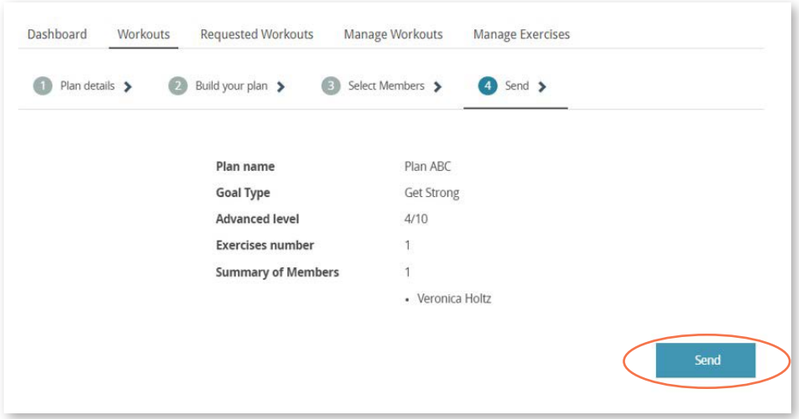

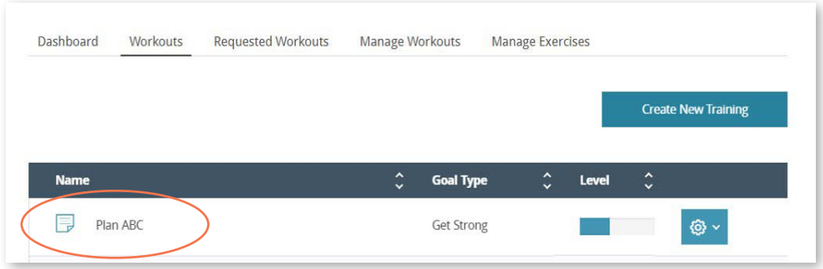

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TRAINING PROGRAM & CLASSES

Facility Workout Creation

WHAT'S THIS FOR?

The training plan builder allows your staff to create training plans and make them available to *all members* at a facility level. Members can download available plans using the app.

STEPS

1. Navigate to Training tab
2. Click on the Programs tab
3. Click on Manage Workouts tab
4. Click on Create New Training
5. Enter in the plan details and click Next
6. Select the exercises using the filters on the left
7. Set the targets (reps, sets, etc.) and click Add an Exercise
8. When plan is complete, click on Save and Next
9. Select Send to All Members > click Next > click Send

OUTCOME

A new workout plan is created and added to the facility's library

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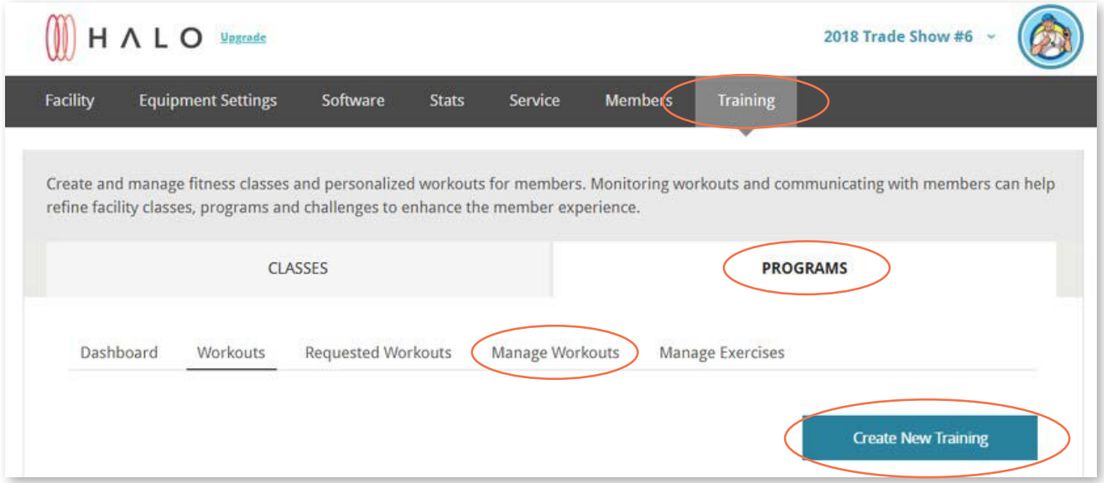

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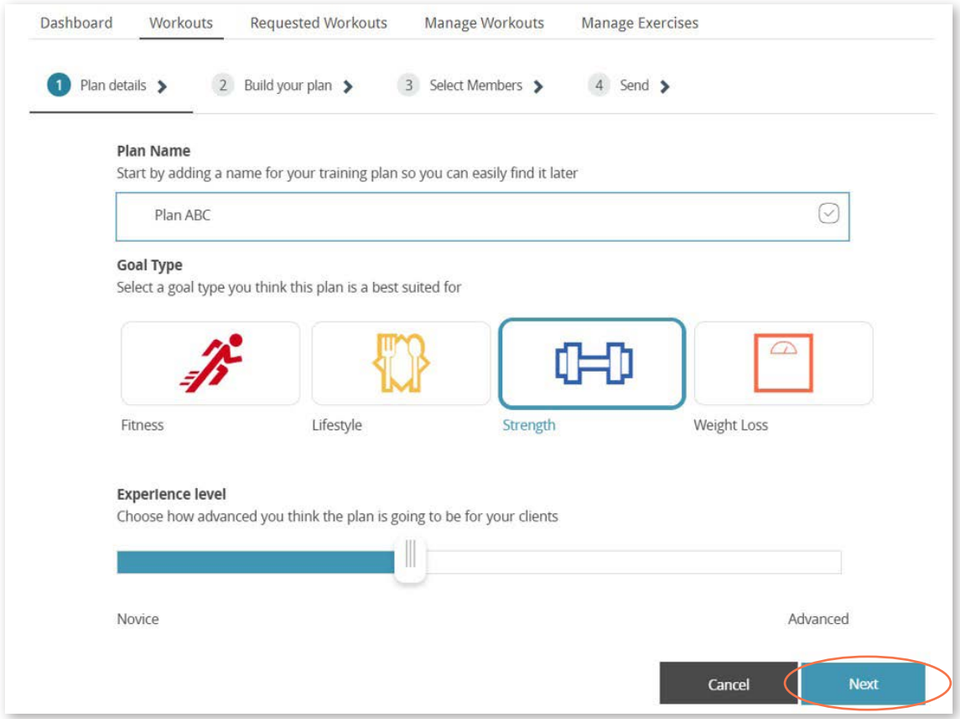

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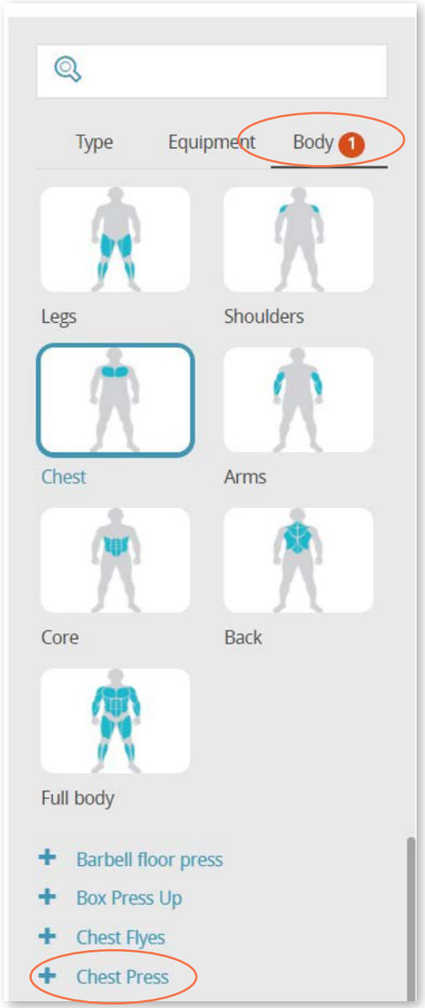

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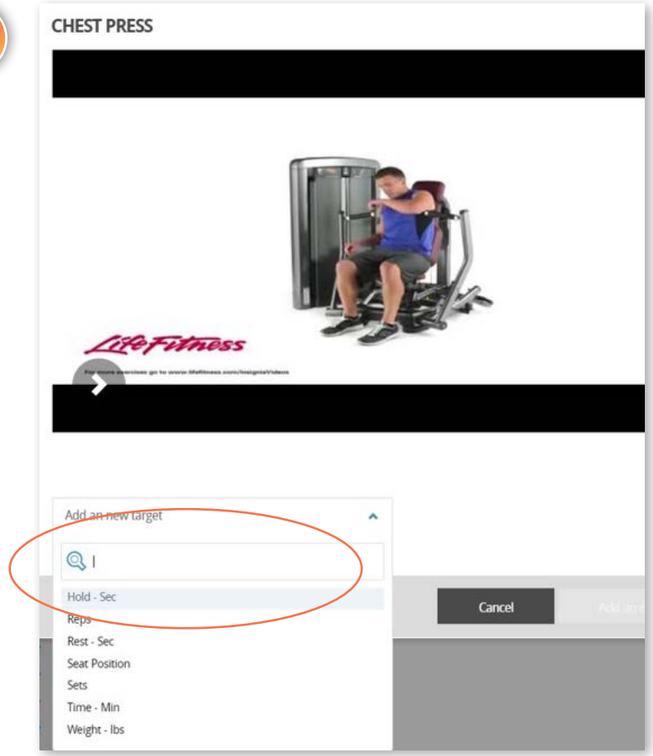

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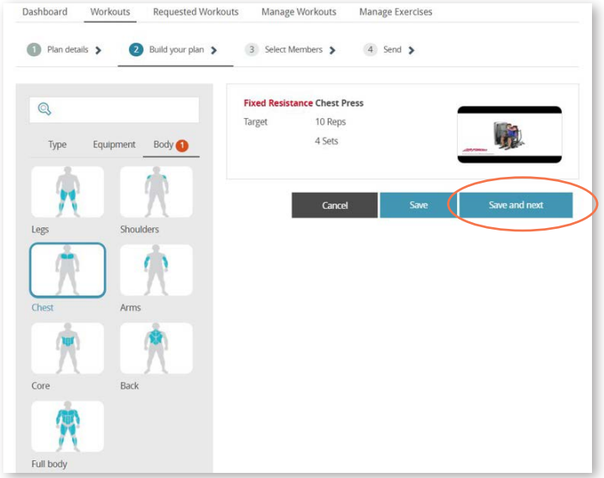

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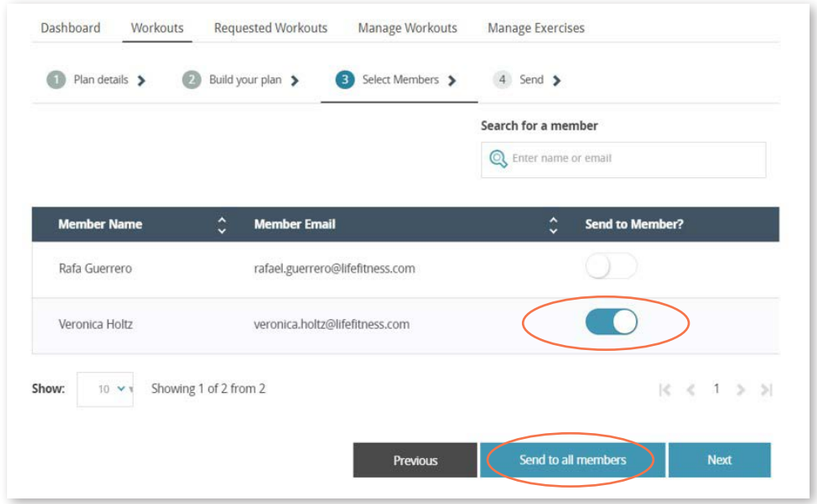

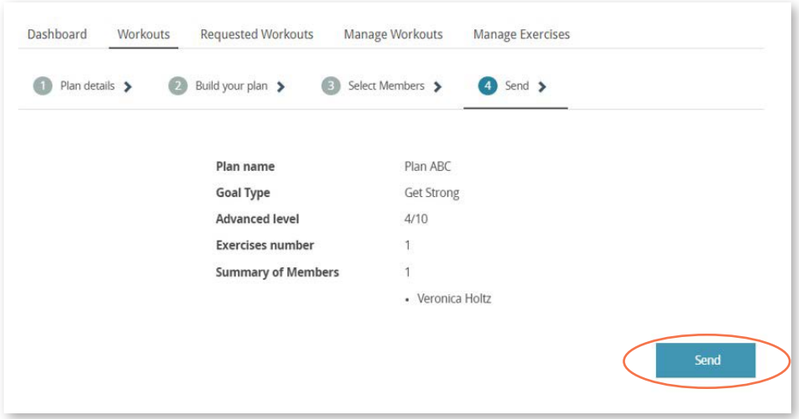

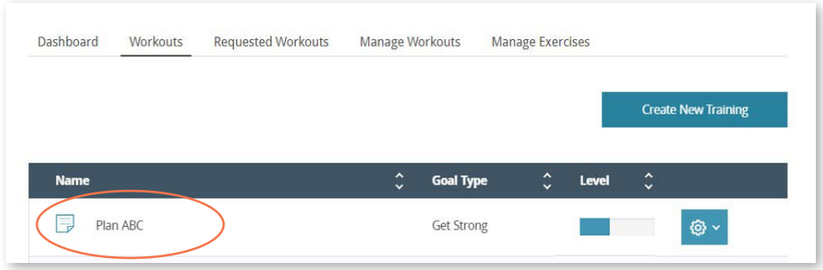

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TRAINING PROGRAM & CLASSES

Group Class Set up

WHAT'S THIS FOR?

Create and manage your group class schedule for your members so they can sign up for classes through the app.

STEPS

1. Navigate to Training tab
2. Click on Classes tab
3. Click on Class Type tab
4. Click on Add Class Type
5. Fill the basic details and click Next
6. Fill in the additional details and click Finish

OUTCOME

A new class type is created and added to facility library

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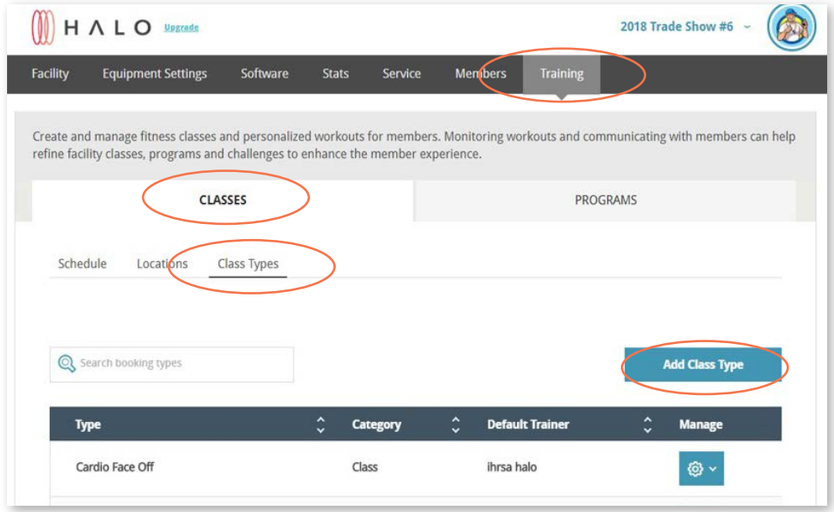

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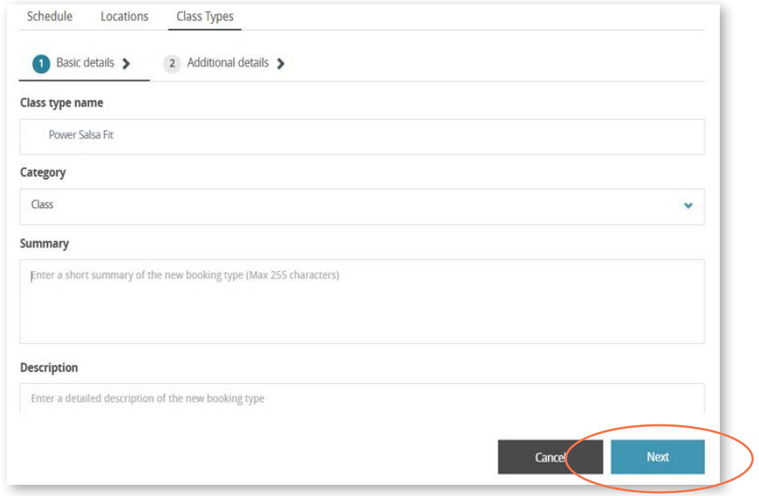

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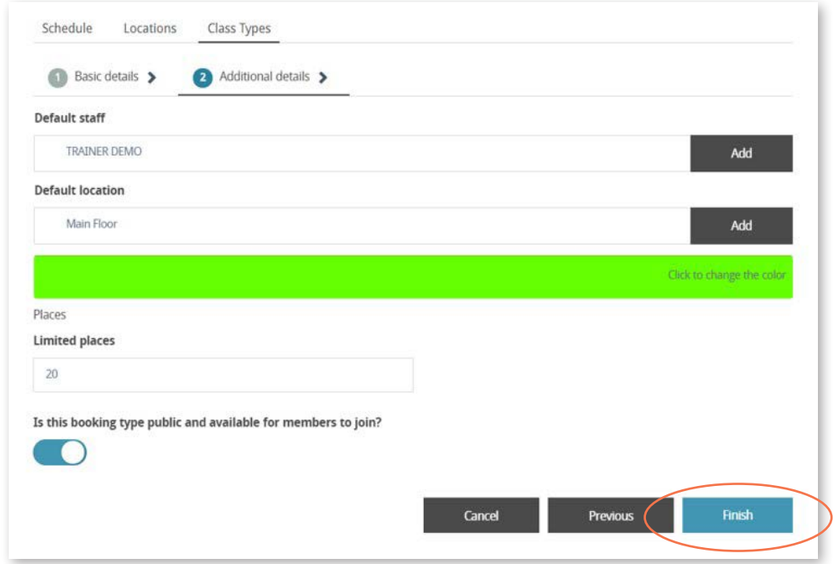

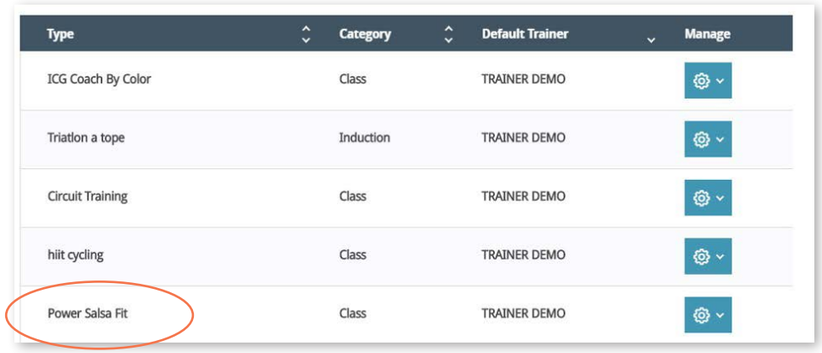

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TRAINING PROGRAM & CLASSES

Add Class Locations

WHAT'S THIS FOR?

Create all the locations where group classes will take place. It could be a room in your facility, a specific area on the gym floor, or even an outdoor location.

STEPS

1. Navigate to Facility tab
2. Click on Classes tab
3. Click on Locations tab
4. Click on Create Location button
5. Fill in the location details and click Add Location

OUTCOME

A new location is added to the library

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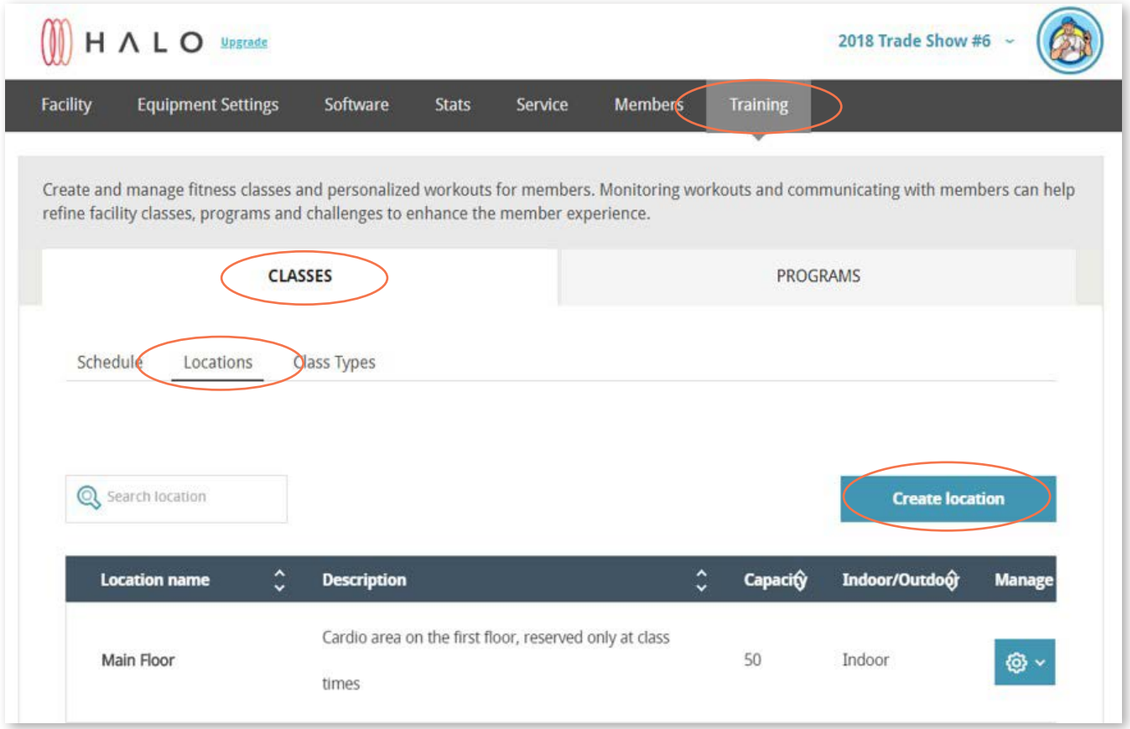

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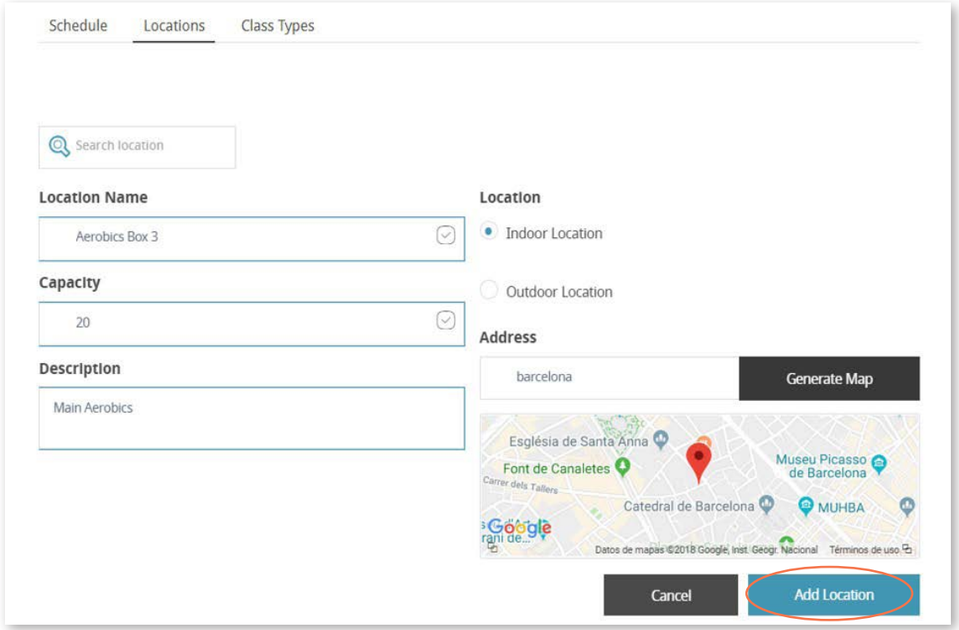

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TRAINING PROGRAM & CLASSES

Class Scheduling

WHAT'S THIS FOR?

The drag and drop feature on the calendar view allows you to organize and update the class schedule

STEPS

1. Navigate to Training tab
2. Click on Classes tab
3. Click on Schedule Tab
4. Drag and drop the class type to the calendar
5. Fill in the basic details (type, dates, location) and click Next
6. Fill in the repetition details and click Next
7. Click Finish

OUTCOME

A new class is published to the calendar

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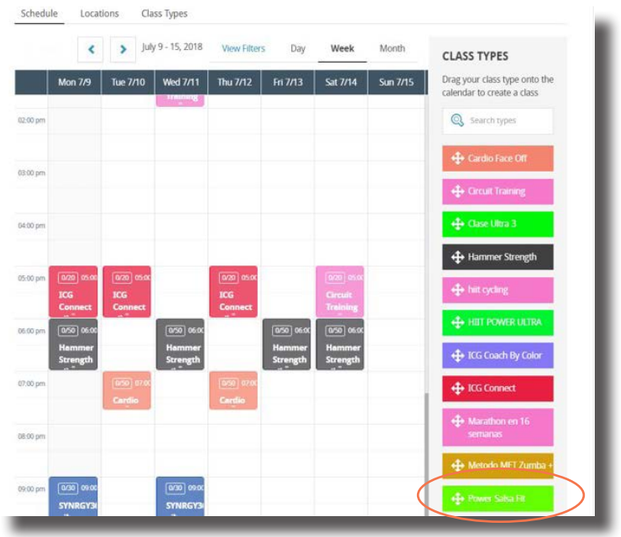

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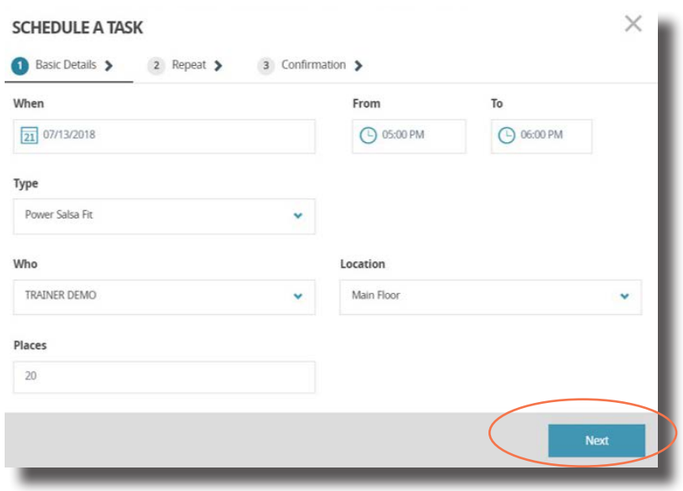

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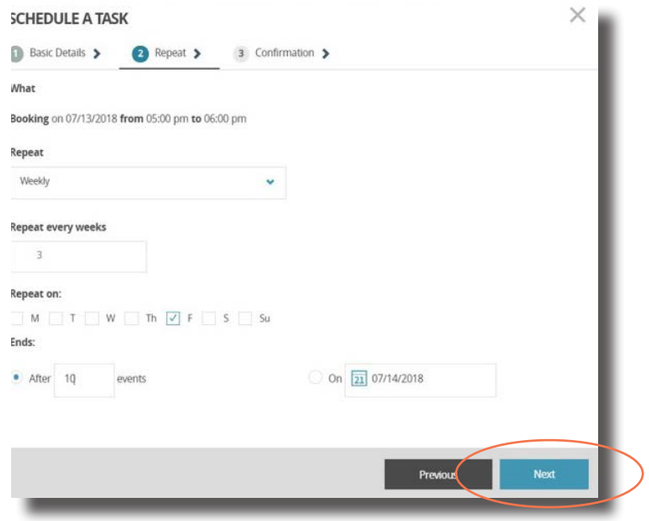

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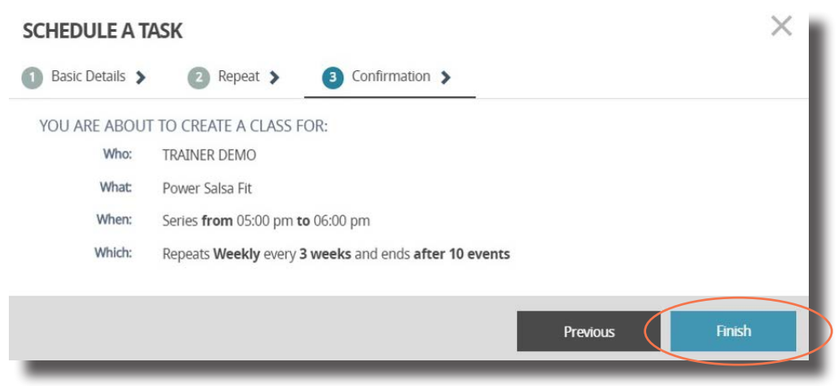

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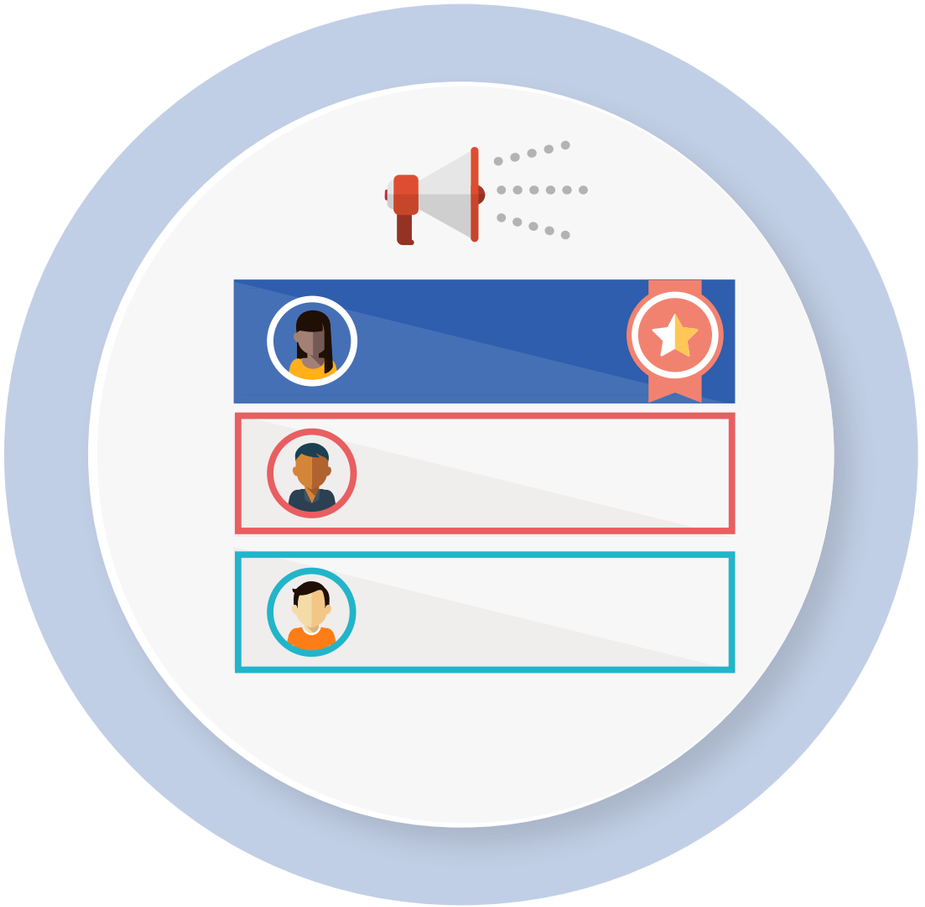
ENGAGE PLAN

Let your members know of important events in your facility using branded email templates. Create challenges with a real-time leaderboard to keep your exercisers engaged and focused.

MEMBERSHIP & PROMOTIONS

- Create Mass Emails
  - Easy-to-build email templates
  - Campaign Analytics
- Build Member Pathways (triggered emails)
- Create Challenges
  - Real-time Challenge Leaderboard



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MEMBERSHIP & PROMOTIONS

Create Mass Emails

WHAT'S THIS FOR?

Create personalized mass emails using easy-to-build templates with flexible designs.

STEPS

1. Navigate to Members tab
2. Click on Promote tab
3. Click on Email Wizard
4. Fill in the basic details and click Next
5. Choose an email design and click Next
6. Fill in the content and click Next
   - Drag Images or use File Picker to upload image
   - Add personalization using custom tags by clicking + sign
7. Select the recipients and click Next
8. Review the details and click Finish

OUTCOME

A mass email is created and sent to selected recipients

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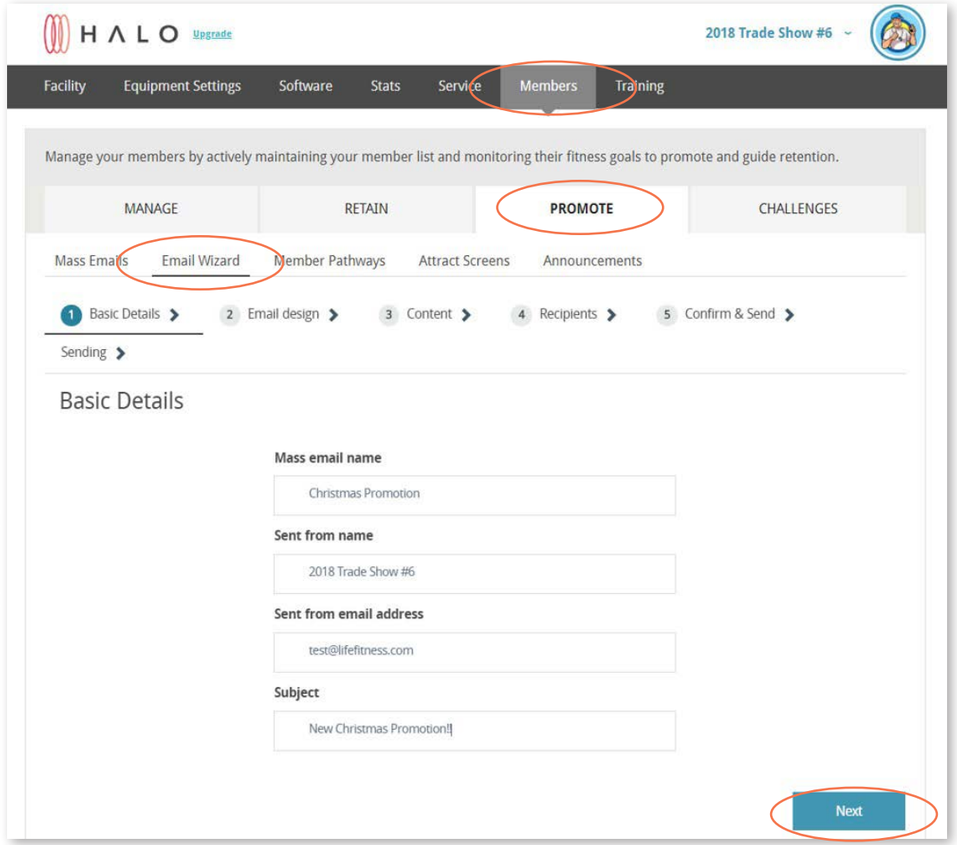

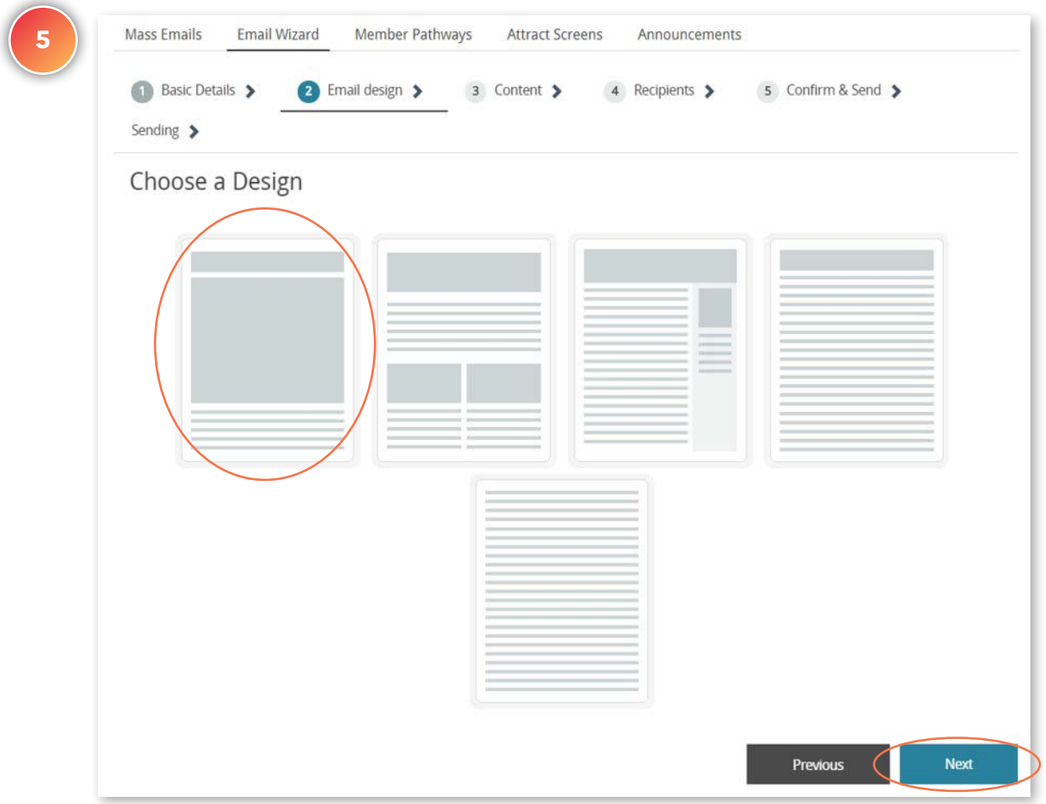

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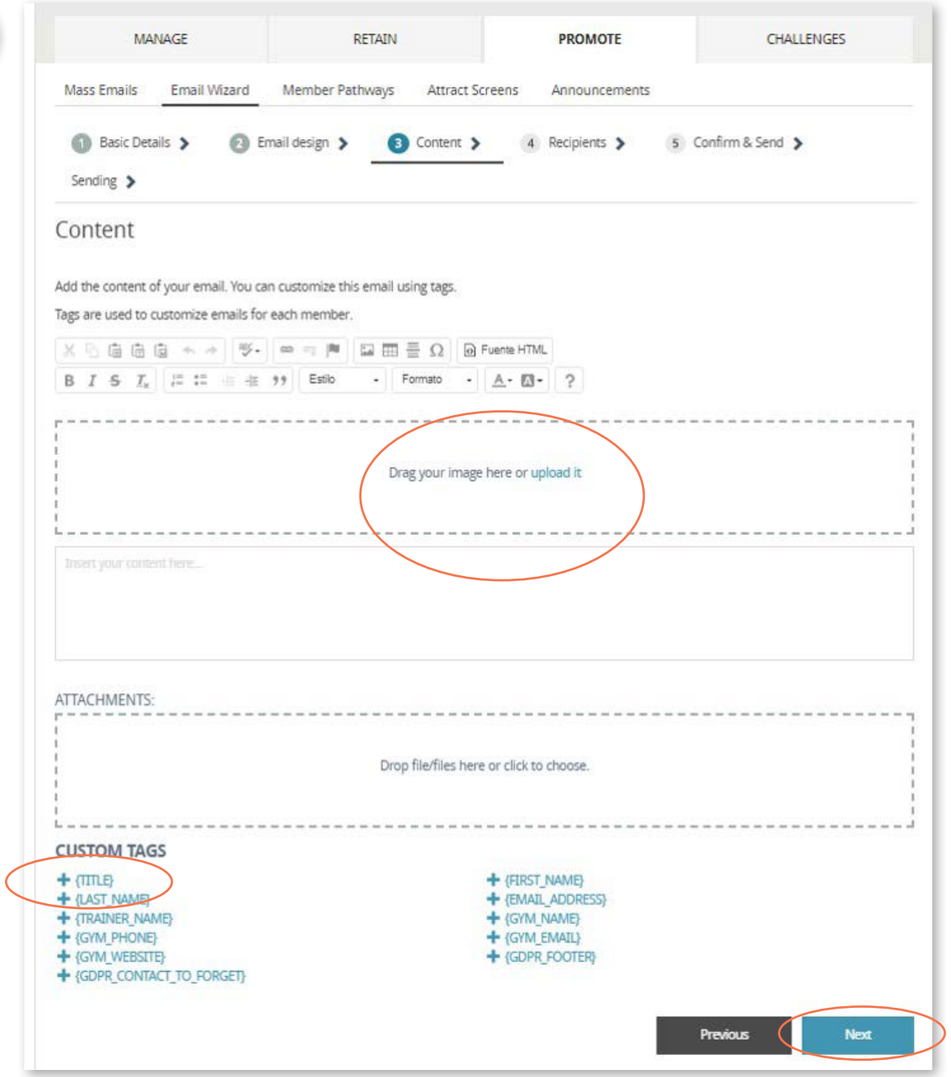

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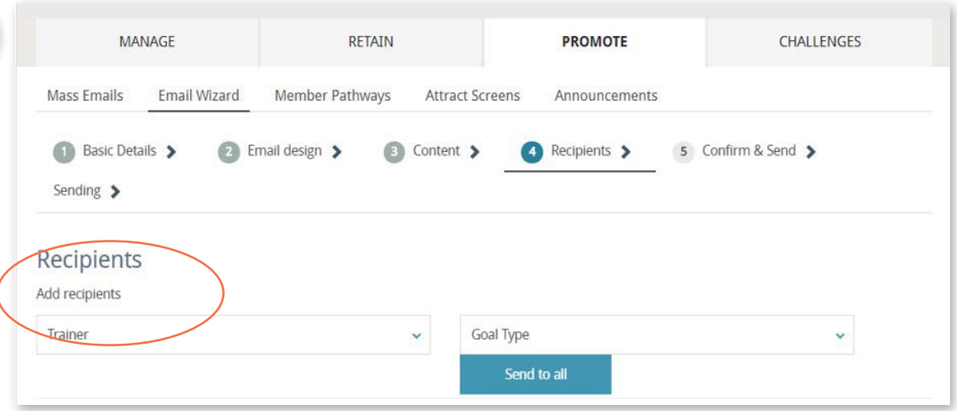

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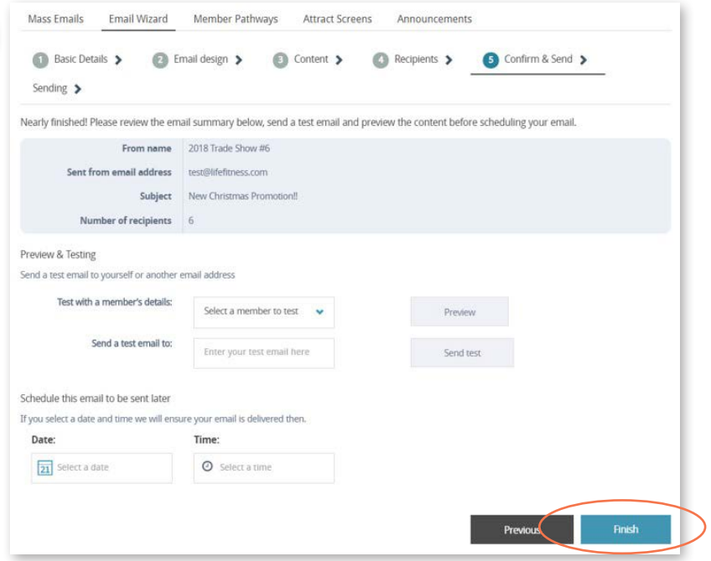

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MEMBERSHIP & PROMOTIONS

Members Pathways

WHAT'S THIS FOR?

Member Pathways is an easy way to schedule messages to engage with your members at any given time. You can setup reminders, motivational emails or follow up actions.

STEPS

1. Navigate to Members tab
2. Click on Promote tab
3. Click on Member Pathways
4. Choose Add Pathway
5. Choose when to trigger the email
6. Enter in the email content and click Save

OUTCOME

A new member pathway is created

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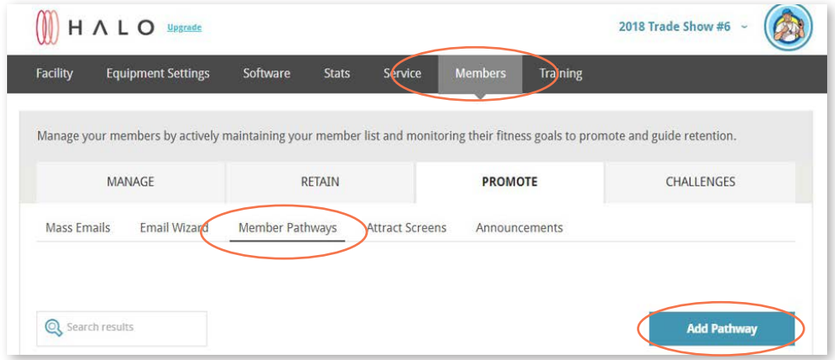

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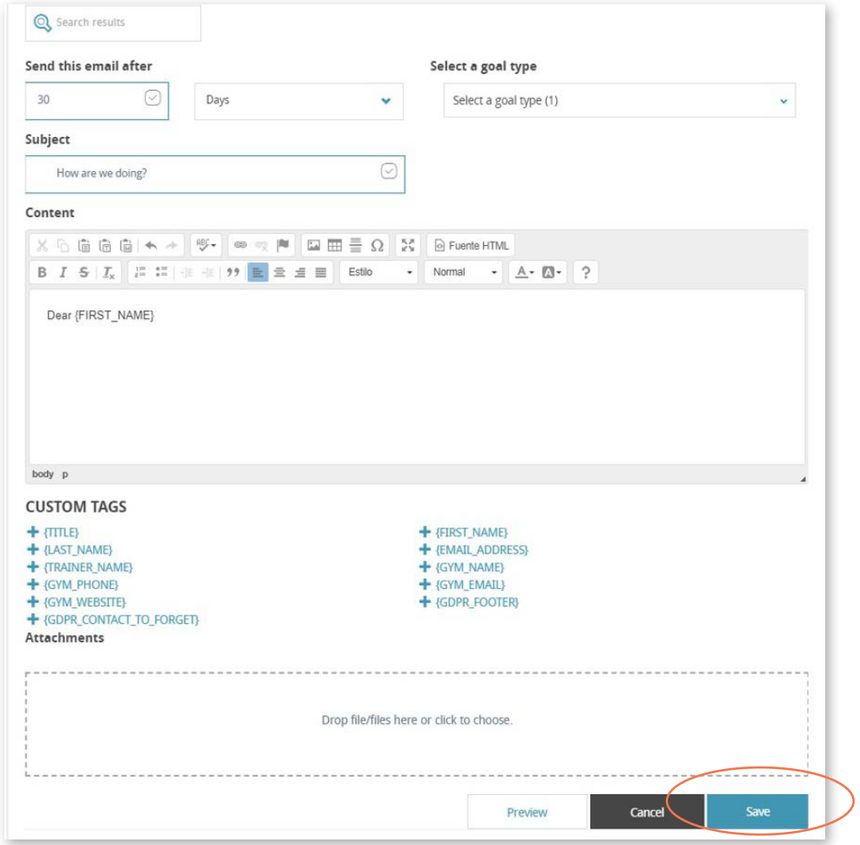

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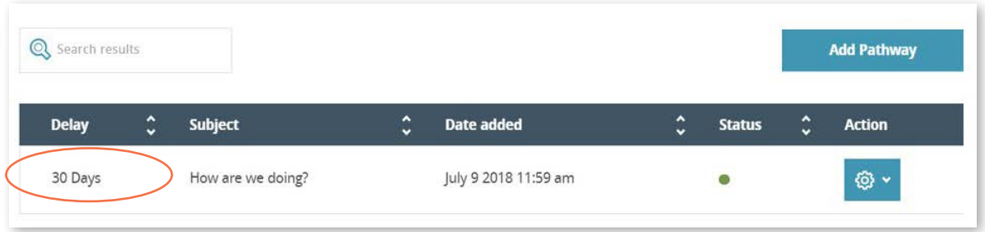

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MEMBERSHIP & PROMOTIONS

Challenges

WHAT'S THIS FOR?

Create and manage fun challenges to keep exercisers engaged. Your members will use the app to join current challenges you create. Check the real-time leaderboard on any of the live challenges to monitor the challenge's progress and see who is taking the lead.

STEPS

1. Navigate to Members tab
2. Click on Challenges tab
3. Click on Add Challenge
4. Fill in the challenge details
   - Choose what completes the challenge
   - Choose what exercisers should track for the challenge
5. Click Save

OUTCOME

A new challenge is created

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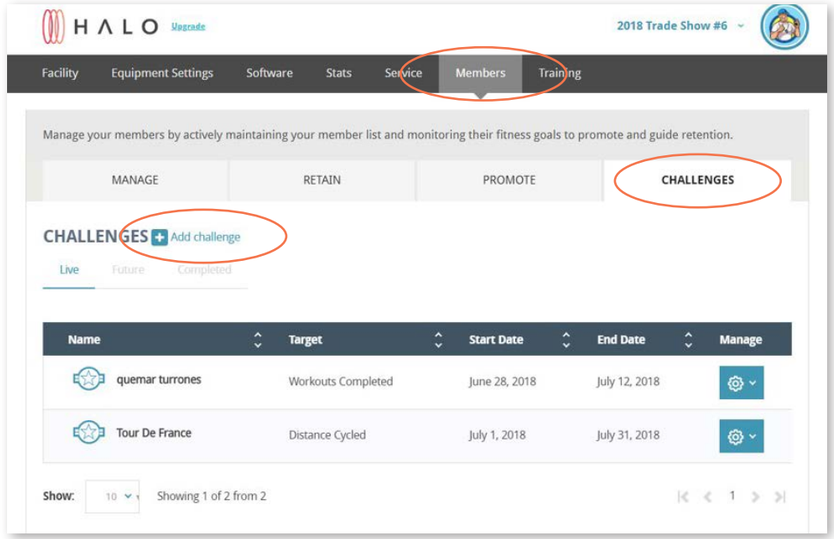

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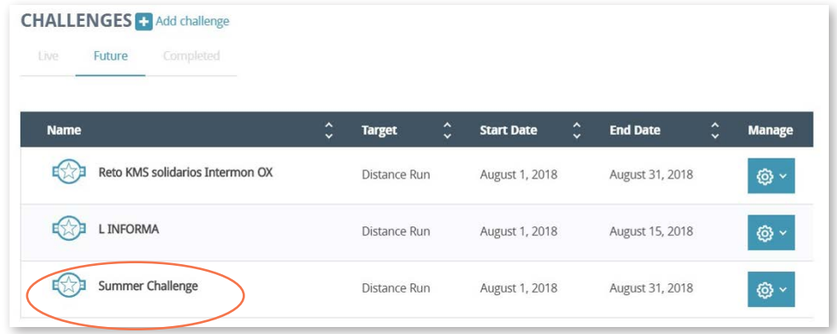

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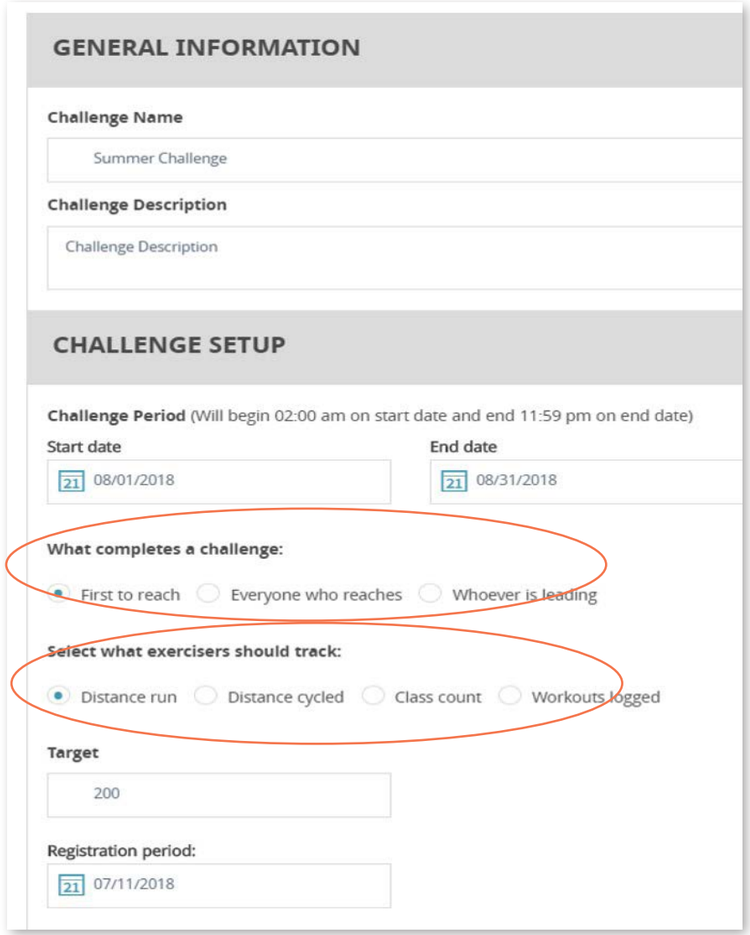

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RETAIN MODULE

Retain helps you understand exerciser goals by aggregating over 150 apps and wearables your members are already using. Using this information helps you build a deeper relationship with your most active users and encourage those who need your help the most so they don't leave your facility.

ONBOARDING MEMBERS

EXERCISER REPORTS

ACTIVITY LEADERBOARD

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RETAIN MODULE

Onboarding Members

WHAT'S THIS FOR?

Invite members to connect their apps and wearables to Retain via personalized web portal or through an email.

STEPS – USING WEB PORTAL

1. Navigate to Members tab
2. Click on Retain tab
3. Copy the link and open it on a new browser
4. Select the goal, fill in the details and click Next
5. Enter member's email
6. Select the apps to connect
7. Authorize each app to finish the process

STEPS – USING EMAIL TEMPLATE

1. Choose email invitation on the promote option
2. Introduce member's email and click Send invitation

OUTCOME

Members connect their apps to Halo account

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WEB PORTAL

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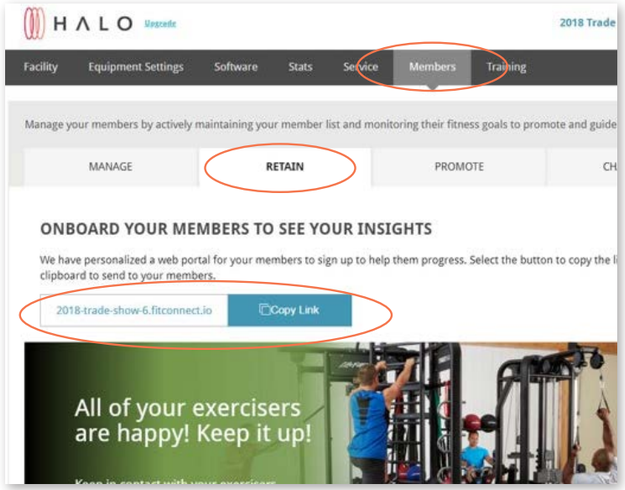

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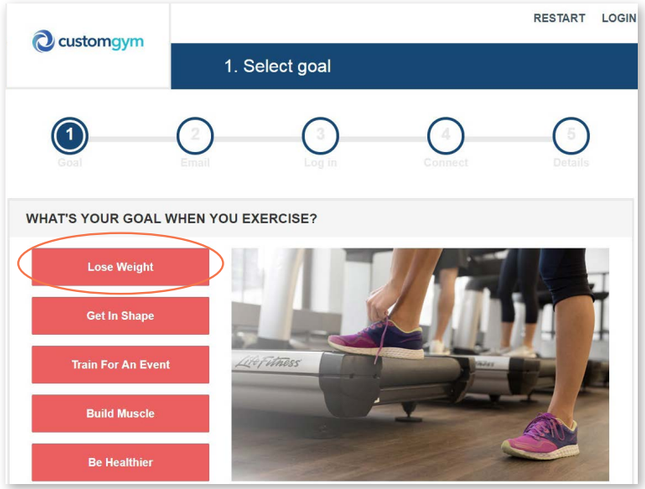

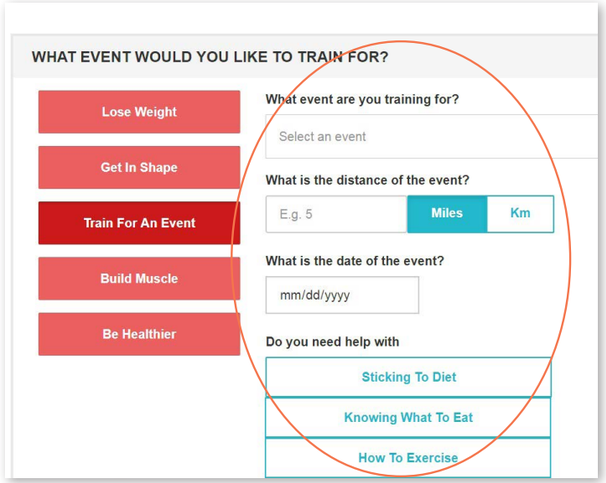

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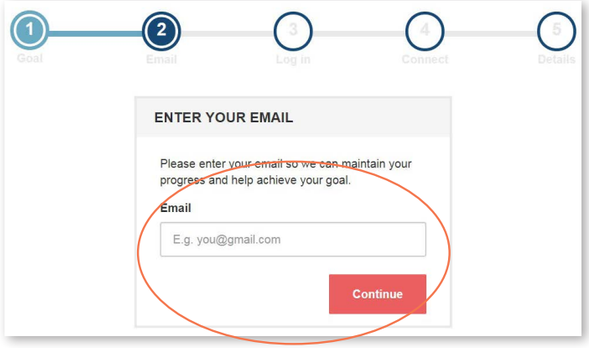

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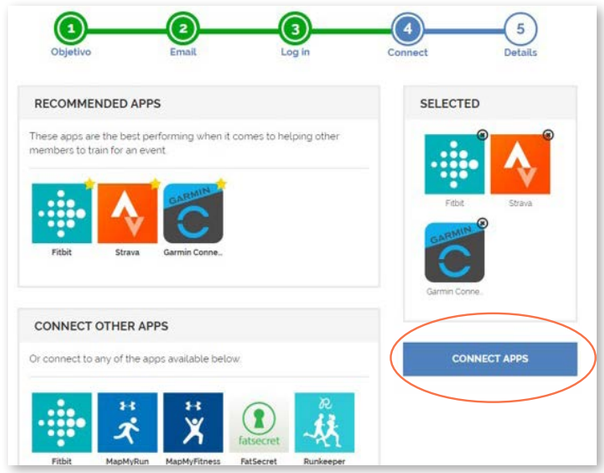

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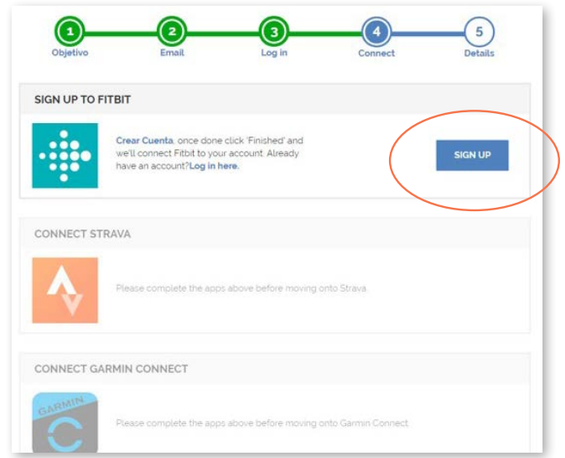

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EMAIL TEMPLATE

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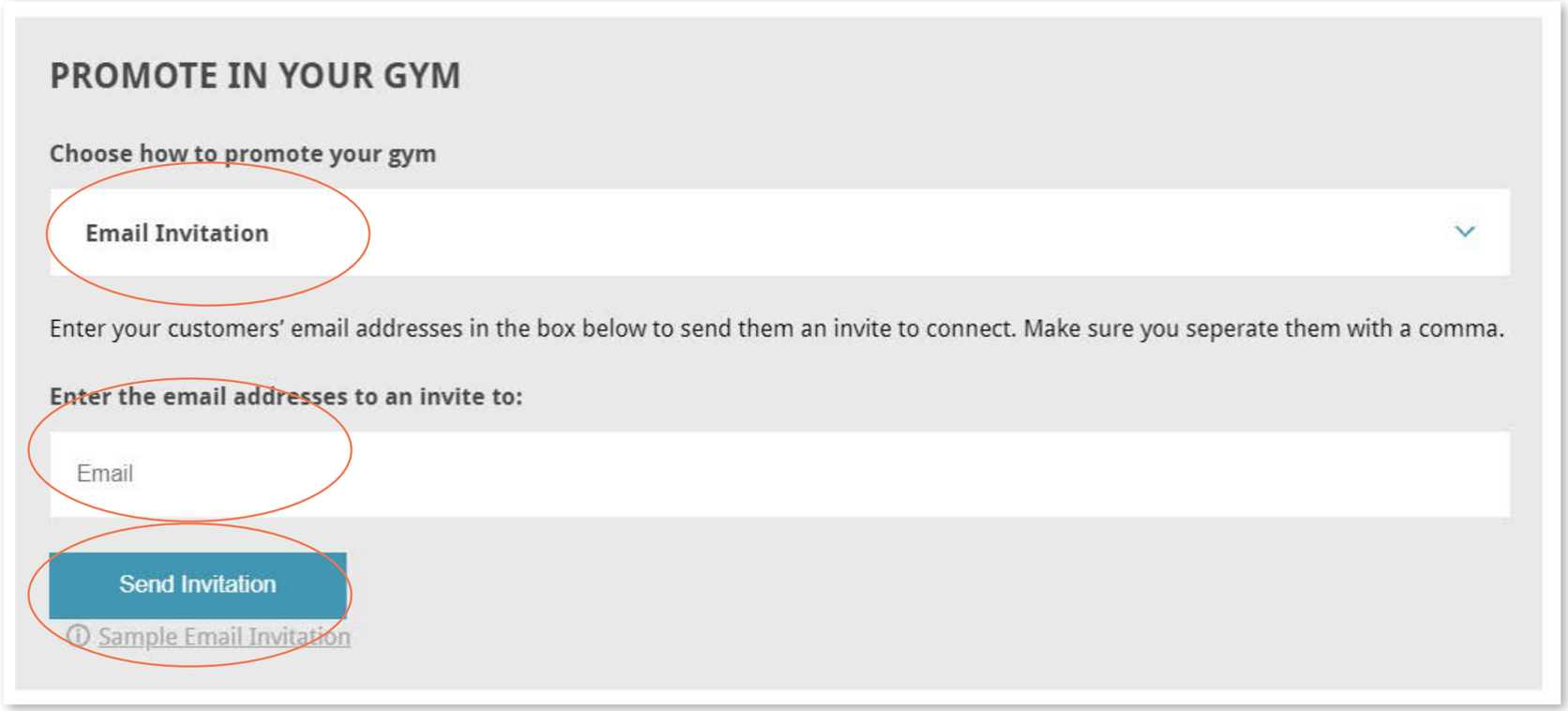

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RETAIN MODULE

Exerciser Reports

WHAT'S THIS FOR?

On the exerciser report, you will see detailed member activity, including exerciser goals and the apps they use.

STEPS

1. Navigate to Members tab
2. Click on Retain tab
3. Scroll down to review the exerciser reports using the filtering options

OUTCOME

Exerciser reports are reviewed

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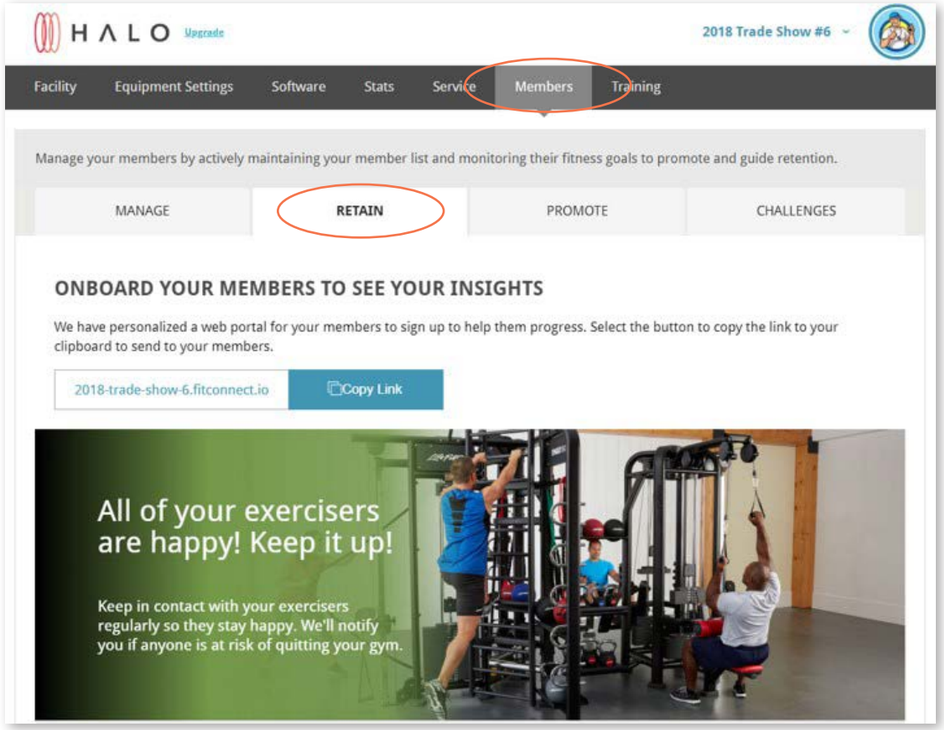

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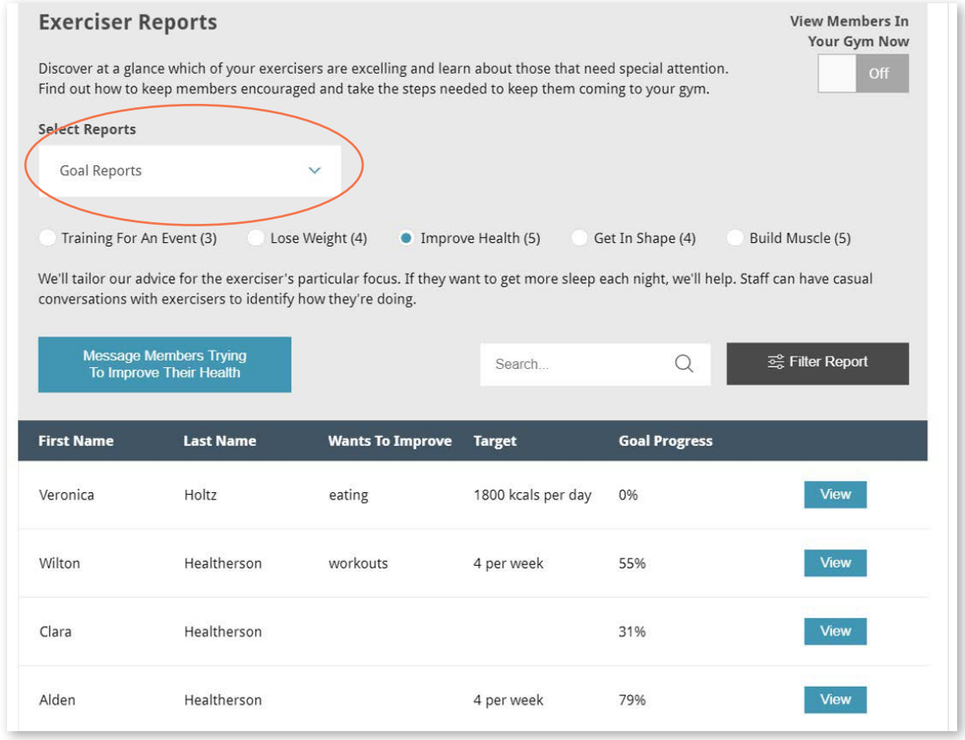

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RETAIN MODULE

Activity Leaderboard

WHAT'S THIS FOR?

The activity leaderboard helps you to connect with most motivated and driven members and at the same time, challenge less active members to join them so everyone can reach their goals.

STEPS

1. Navigate to Members tab
2. Click on Retain tab
3. Scroll down to review the activity leaderboard reports using the filtering options

OUTCOME

Activity Leaderboard reviewed

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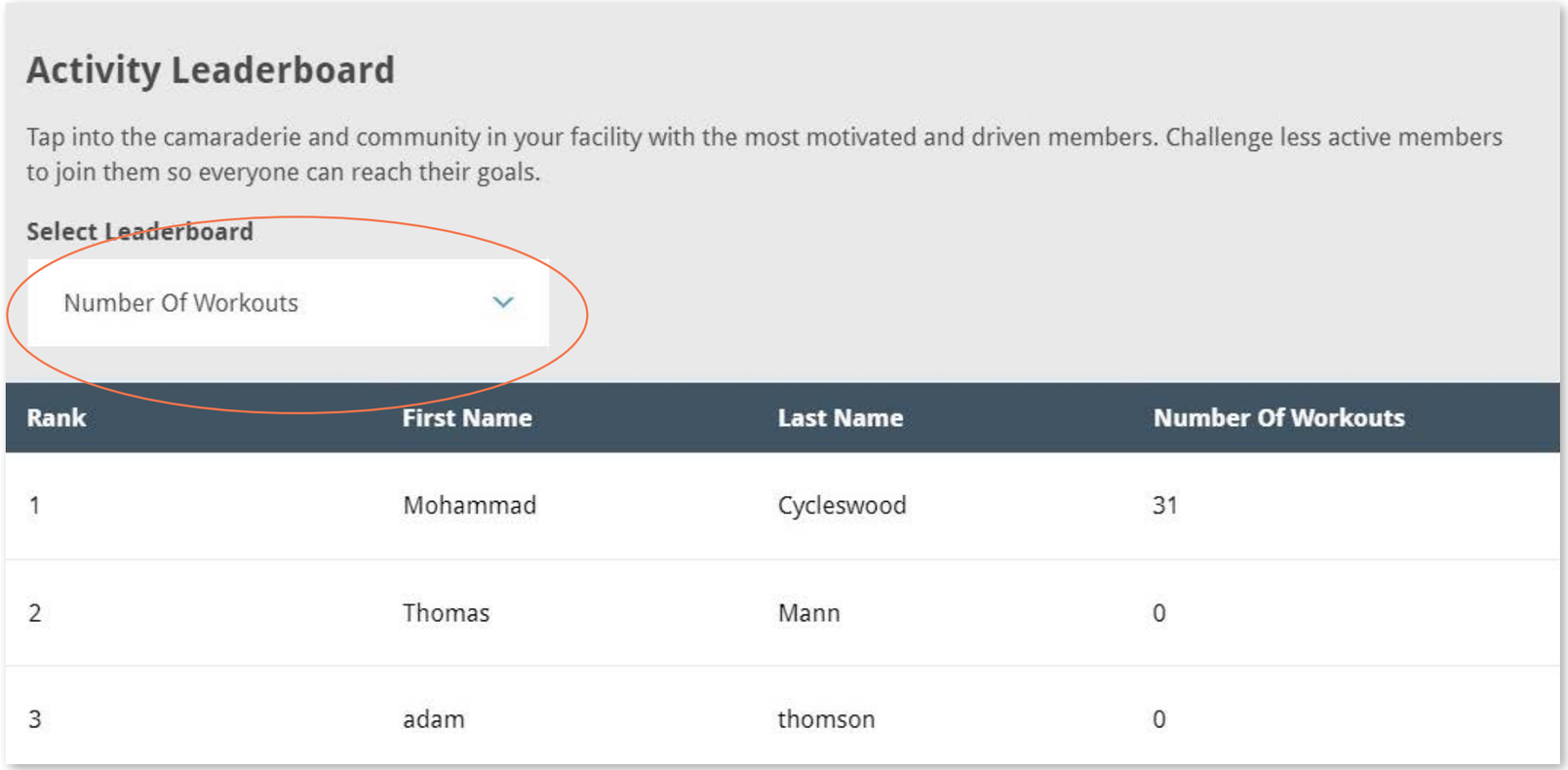
Activity Leaderboard
Tap into the camaraderie and community in your facility with the most motivated and driven members. Challenge less active members to join them so everyone can reach their goals.
Select Leaderboard
Number Of Workouts
Rank
First Name
Last Name
Number Of Workouts
1
Mohammad
Cycleswood
31
2
Thomas
Mann
0
3
adam
thomson
0

JOB TRACKER MODULE

Use Job Tracker to track any type of task around your facility. Assign a task to your staff and they will be receive an email notification. Easily stay on top of the jobs with notifications when the status changes or if a comment is posted.

ASSIGN TASKS

TRACK JOBS

CUSTOM PREVENTIVE PLAN

WORK HISTORY

Back to Plans Overview >

JOB TRACKER MODULE

Assign Tasks

WHAT'S THIS FOR?

Create jobs, ranging from routine equipment maintenance to replacing towels, and assign them to staff. The assigned staff member then receives a task notification.

STEPS

1. Navigate to Service tab
2. Click on the Maintenance Tab
3. Click on Add Job Order
4. Fill in the order details and click Create

OUTCOME

- New job order created on the facility account
- Email notification is sent to Staff Member assigned

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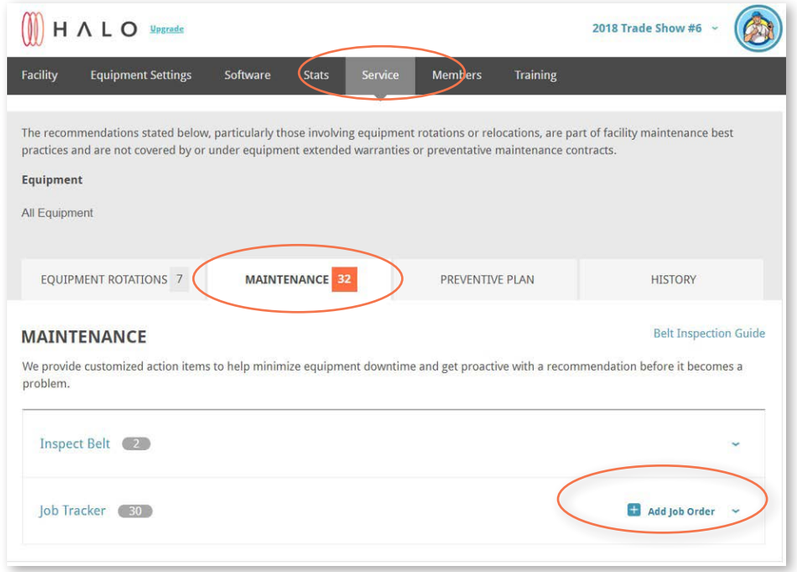
3



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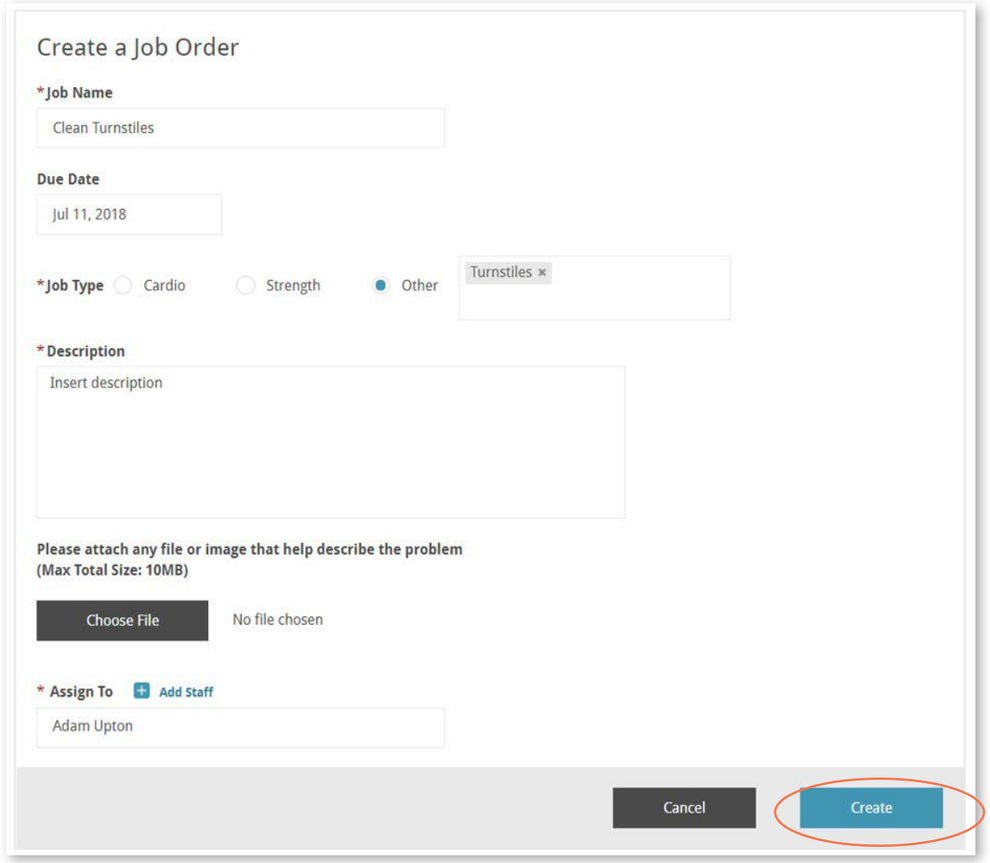

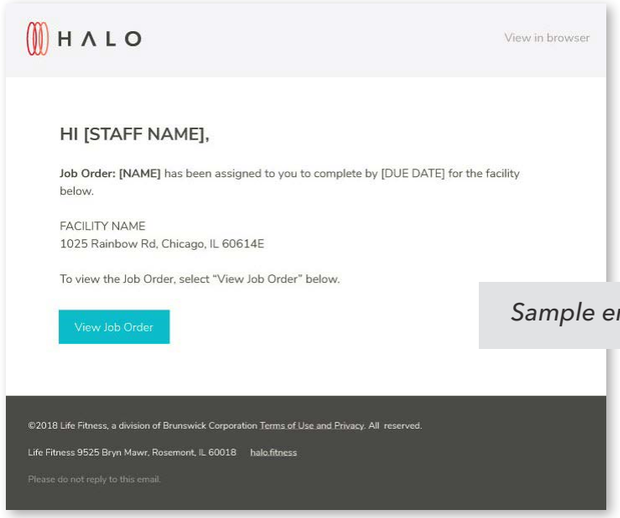

Sample email notification when job is assigned

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JOB TRACKER MODULE

Track Jobs

WHAT'S THIS FOR?

Each job order allows your staff to track all the orders to completion: tasks remain "in progress" until completed and marked as closed. All completed job orders live within History in the Service tab.

STEPS

1. Navigate to Service tab
2. Click on the Maintenance tab
3. Expand the Job Order menu to review the progress

OUTCOME

- Job order's status is reviewed
- Email notification is sent when status changes or comment is posted

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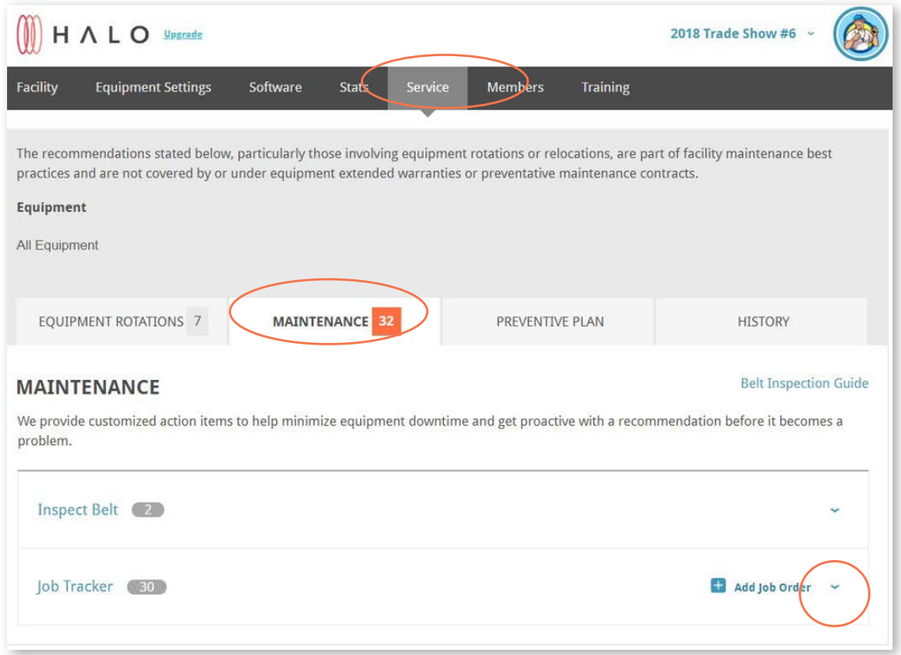

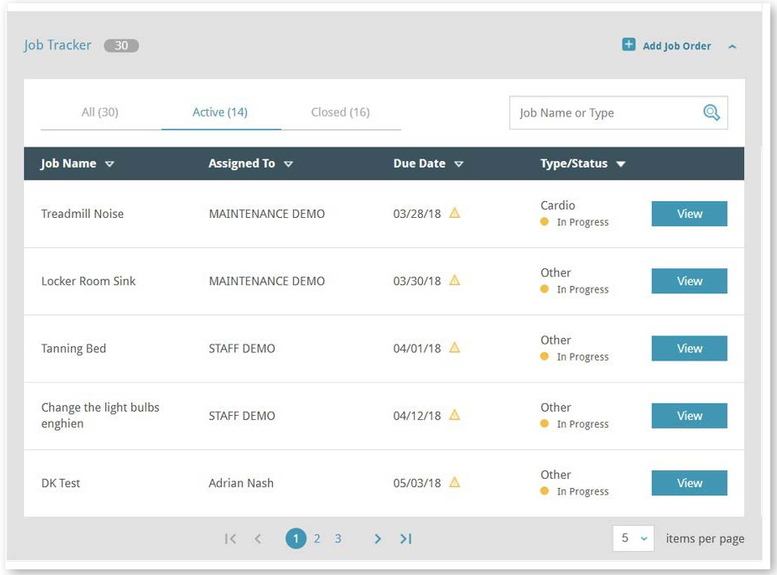

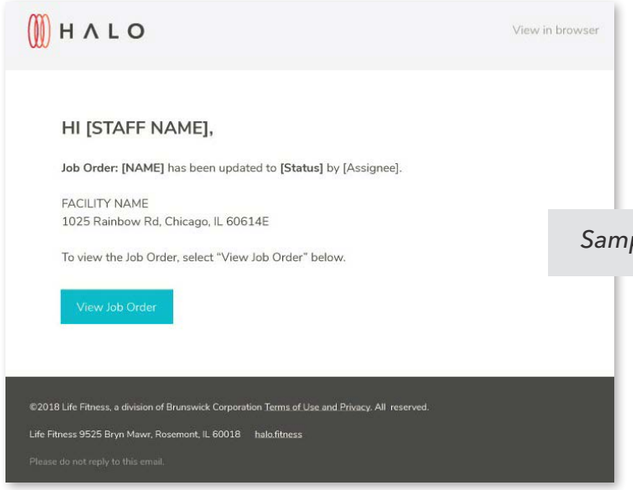

Sample email notification when status is changed

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JOB TRACKER MODULE

Custom Preventive Plan

WHAT'S THIS FOR?

The custom preventive plan allows you to set up plans for your equipment not maintained through Halo. Fitness. Add your own specific tasks, such as maintenace for your pilates reformers or sanitization of mats and accessories.

STEPS

1. Navigate to Service tab
2. Click on the Preventive Plan tab
3. Click on Add Custom Plan
4. Enter in Equipment Type and Equipment Name, click Add
5. Select the Staff Member to assign to the task
6. Choose the day of the week and frequency of the task
7. Click Add, add more tasks as needed
8. Review the plan and click Create

OUTCOME

- New custom schedule is created
- Staff is assigned new tasks

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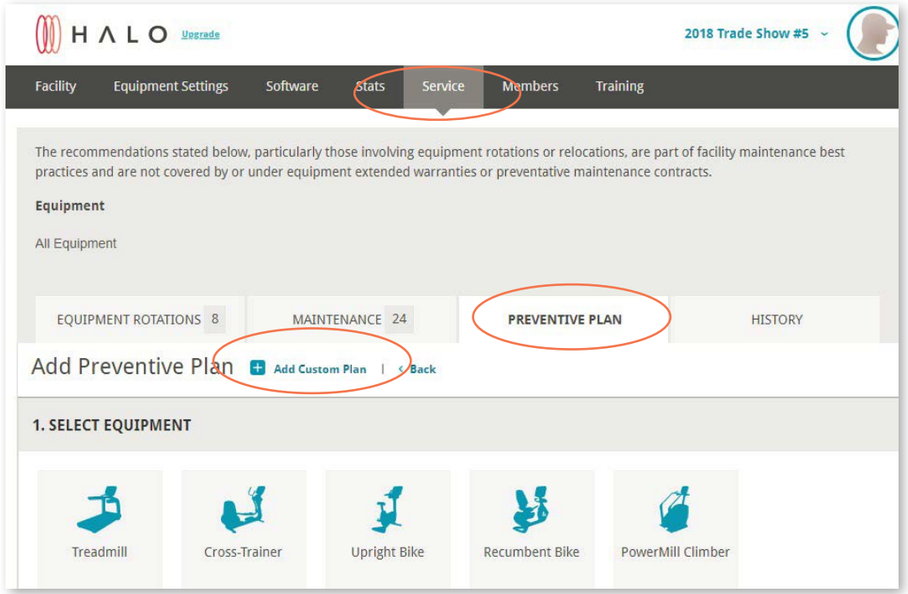

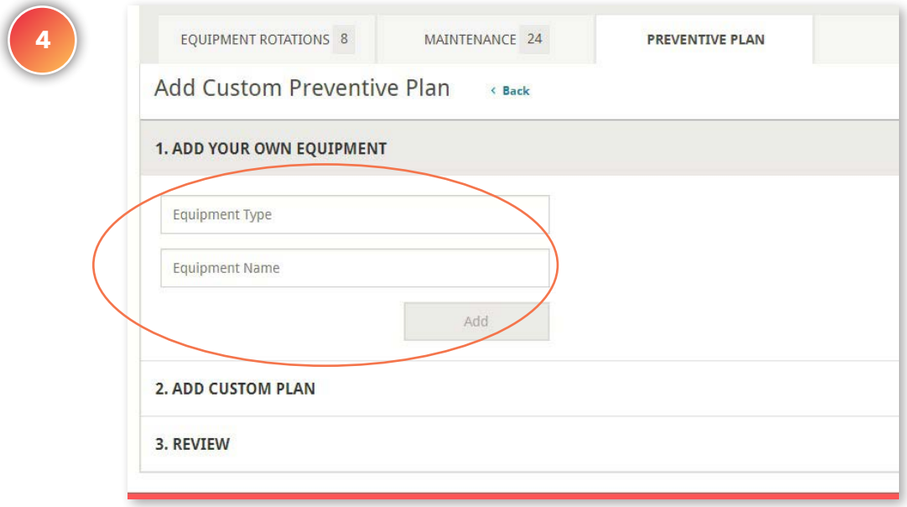

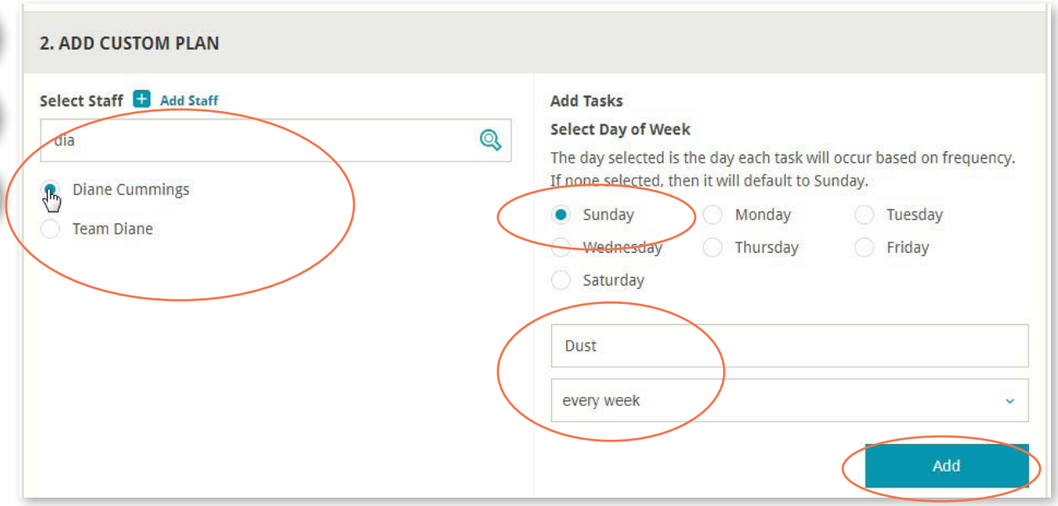

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JOB TRACKER MODULE

Work History

WHAT'S THIS FOR?

History shows all the equipment rotation, maintenance records and job orders for the last year.

STEPS

1. Click on the Service tab
2. Click on the History tab
3. Navigate through the list to review the history of equipment rotations and maintenance tasks

OUTCOME

Maintenance history is reviewed

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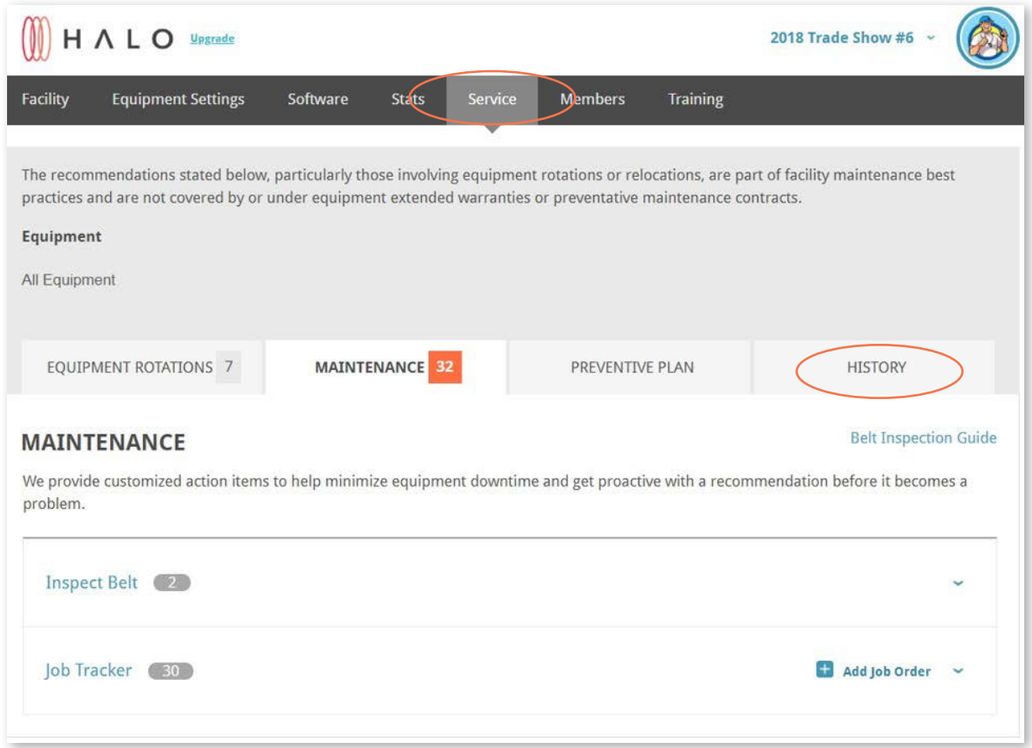

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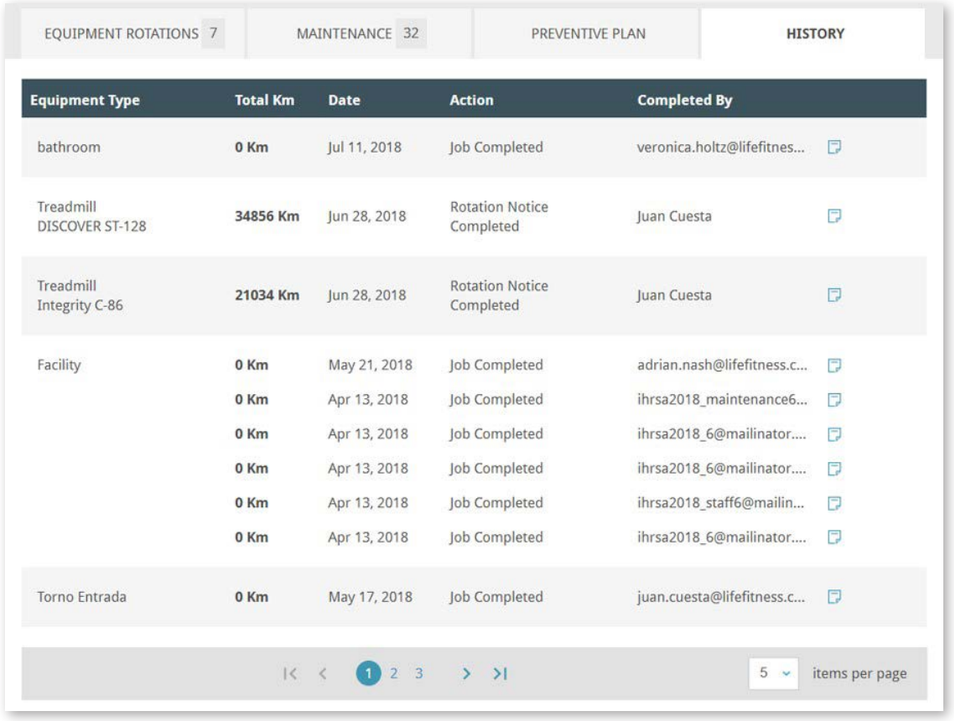

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HALO

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