

Pike13 Trial Site Quick Start Guide



Welcome to Your Pike13 Trial

This Quick Start Guide is designed to help you establish your trial site over the next seven days. Each day focuses on specific tasks to set up your business identity, manage services and products, and enhance client communication, all while preparing you for a successful onboarding experience. By the end of the week, you'll have a fully operational site reflecting your brand and supporting your business growth.

Trial Site Goals

Setting clear goals is essential for evaluating your Pike13 trial experience and making an informed decision about your software partner. The six goals outlined below will guide you in assessing how well Pike13 aligns with your business objectives, streamlining your operations, and enhancing client engagement. By focusing on these goals, you can effectively determine if Pike13 is the right fit for your needs.



Establish Your Business Identity



Configure Services



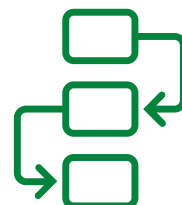
Set Up Staff



Create and Manage Products



Enhance Client Communication



Test Workflows



Day 1: Build Your Business Identity

Welcome to your first day with Pike13!

Today, you'll focus on the foundation of your business by setting up key details such as your business name, location, and operating hours. Getting these basics in place will ensure that everything else flows smoothly as you start using the platform.

Tasks to Complete:

- Add your business name, logo, and contact info.
- Explore Business Settings
- Create your first service (class, appointment, or event).

Helpful Links:

- [Updating Your Business Name & Settings](#)
- [Personalize Your Business with a Custom Logo](#)
- [Understanding Pike13 Service types: Classes, Courses, and Appointments](#)
- [Knowledge Check: Services](#)



Day 2: Set Up Staff & Customize Site

On Day 2, it's all about building your team and enhancing your brand.

You'll add staff members and set their roles and permissions. Plus, you'll customize your branding by adjusting colors, logos, and public-facing options to create a cohesive look and feel for your business.

Tasks to Complete:

- Add one staff member and assign them to the service.
- Explore user permissions for staff roles.
- Customize your website: adjust the layout, and set your brand colors.

Helpful Links:

- [Understanding the Staff Roles](#)
- [Knowledge Check: Staff Roles](#)
- [How to Add and Manage Your Staff on Pike13](#)
- [Customize Your Pike13 Site](#)



Day 3: Products

Today, you'll dive into creating products that can boost your revenue. You'll learn how to create passes and memberships, making it easier for clients to engage with your offerings. Additionally, you'll link these products to your services, streamlining the purchasing process for your clients.

Tasks to Complete:

- Create your first pass or plan (punch card or recurring membership).

Helpful Links:

- [Understanding Product Types in Pike13](#)
- [Knowledge Check: Passes & Plans](#)



Day 4: Client Communication

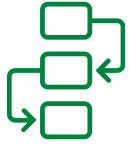
Engaging with your clients is key to building strong relationships, and today you'll explore how to enhance client communication. You'll discover how to personalize email notifications and set up automated messaging to keep clients informed and engaged. You'll also gain insights into client roles, such as clients with dependents, which will help streamline registration and communication.

Tasks to Complete:

- Learn About Clients and Client Roles
- Complete the Knowledge Check: Client Roles and Relationships
- Customize the welcome email clients receive upon sign-up.
- Set up Special Instructions on a Service for confirmation emails

Helpful Links:

- [Understanding Client Roles](#)
- [Knowledge Check: Client Roles and Relationships](#)
- [Email Settings for Success](#)
- [Customize Your Welcome Email](#)
- [Special Instructions](#)



Day 5: Testing the Workflow

Today is an exciting opportunity to experience the client sign-up process firsthand. You'll add test clients and navigate a mock client sign-up on your site, helping you understand how everything functions from the client's perspective. Using our demo site, Ford Creek Music, you'll gain valuable insights that can enhance your real client experience.

Tasks to Complete:

- Complete Ford Creek Music Activity
- Add a test client to try out the system.
- Enroll the test client in the service and assign them a pass or plan.

Helpful Links:

- [Activity: Become a Client at Ford Creek Music](#)
- [Testing Pike13](#)



Day 6: Explore Your Options

On Day 6, you'll discover the powerful integration capabilities of Pike13. You'll explore add-ons like email marketing, website integration, and reporting and analytics that can elevate your business operations. Additionally, you'll review available apps designed to expand your business's potential and improve efficiency.

Tasks to Complete:

- Review our integration partners to understand how they can streamline your business processes.
- Explore the features and benefits of our apps, including the Client App, Branded App, Staff App, and Kiosk App.
- Visit the Trial Help Center's Reporting Section to see the types of reports available and how to generate them.

Helpful Links:

- [Pike13 Integrations](#)
- [Pike13 Client App](#)
- [Pike13 Staff App](#)
- [Pike13 Kiosk App](#)
- [Introduction to Reporting in Pike13](#)



Day 7: Final Review & Onboarding

Congratulations on reaching the final day of your trial!

Today, you'll recap your experience and finalize your site setup, ensuring everything is in place. You'll also prepare for the next steps, including onboarding with Pike13 if you decide to move forward with the platform.

Tasks to Complete:

- Select the plan that best suits your business needs.
- Review this Guide to verify that all tasks have been accomplished.

Helpful Links:

- [Which Plan is Right for Me?](#)
- [Sneak Peek into Your Onboarding Experience](#)



Additional Considerations

Consideration	Details
Explore Integrations	Investigate how Pike13 integrates with your tools, such as payment processors.
Client Feedback	Gather feedback from test clients and staff to improve processes.
Consider Launch	Plan and communicate a launch date with your staff and onboarding specialist, should you decide to proceed with Pike13.
Training Resources	Take advantage of training resources and tutorials provided