CHALK IT PRO

FULL SUITE EXPRESS ONBOARDING CHECKLIST

USA-BASED GYMS

Powered by Chalk It Pro Payments

Welcome! This quick-start checklist will help you get your gym fully set up in **Chalk It Pro**. It's just a checklist, so use the Full Suite Onboarding Guide (USA-Based Gyms) for step-by-step set-up instructions.

1 ORGANIZATION PROFILE & CHALK IT PRO PAYMENTS APPLICATION

- ☐ Fill out the Information Collection Form
- ☐ Complete Application
- ☐ Complete your PCI Compliance SAQ (arrives ~7-10 business days after approval)
  - Use the CHIP PCI Guide for help
  - Non-compliance carries a $50/month penalty
- ☐ Organization Profile & Settings Setup

2 IMPORT MEMBERS & COACHES

CHOOSE 1:

- ☐ **Option A**
  - Email your member list (.CSV file) to **support@chalkitpro.com**
  - Use subject line: "Member Import"
  - Mandatory columns: Email, First Name, Last Name (see the guide for optional columns and the template)
- ☐ **Option B**
  - No .CSV file? No problem. Send members a link to register and add their billing info. Tackle this at a later step.
- ☐ Invite coaches to log in (optional)

3 DECIDE HOW TO GET PAYMENT METHODS INTO CHIP

- ☐ Fill out the Payment Method Migration Questionnaire

CHOOSE 1:

- ☐ Option A: Migrate payment methods. Start this step now.
- ☐ Option B: Members enter payment info manually. Done at a later step.

START THESE EARLY

- **Payments application:** click the email link within **24 hours** and finish within **30 days**.
- **Payment method migration:** 7–14 business days after submission. Request your export file from your old processor early.
- **PCI SAQ:** arrives ~7–10 business days after approval. Complete it promptly to avoid the $50/month penalty.

4 ADMIN SETUP

- ☐ Set up tax rates (if applicable)
- ☐ Create Tracks (e.g., CrossFit, Bootcamp, Kids)
- ☐ Create Documents (waivers, contracts, SOPs)
- ☐ Add Coupons & Discounts for memberships or store products
- ☐ Configure Memberships (drop-ins, trials, punch cards, and subscriptions)
- ☐ Add Store Products (shirts, supplements, gear)
- ☐ Set up Assistant COMING SOON

5 STAFF & CLASS SETUP

- ☐ Add and schedule recurring classes and appointments
- ☐ Set up Staff Pay COMING SOON

6 MEMBER ENGAGEMENT FEATURES

- ☐ Set up your Committed Club
- ☐ Set up Chalkboard & Achievements COMING SOON
- ☐ Create Banners & Announcements
- ☐ Get familiar with Chalk Talk

7 IMPORT WORKOUT PROGRAMMING

- ☐ Import past workouts
- ☐ Import results (Gym's User Results or Individual User Results, depending on your old platform)
- ☐ Explore Marketplace Programming (optional)

8 GET READY FOR LAUNCH

- ☐ Send members access if they weren't created by .csv import
- ☐ Make sure members have payment methods set
- ☐ Assign memberships
- ☐ Invite members to the app
- ☐ Spread the word with Member Flyers and the Quick Tour for Members

NEED HELP AT ANY POINT?

Reach out via chat or email — we're here for you!

support@chalkitpro.com

intercom.help/chalk-it-pro