DIGITAL CONTENT SAMPLE
Quick Reference Guide

This quick reference guide was created for PT Portal application users.

We used Microsoft Word as the authoring tool, to create and publish this guide in PDF format.

We adhered to the Microsoft Manual of Style for Technical Publications (MSTP) standard for creating and reviewing content.

This quick reference guide provides brief information about the PT Portal application.

Quick Reference Guide

How to add

- **New Client**: On the **Client & Schedule** tab, click **Client Management**, and then click **Add New Client**. OR
  On the **Dashboard,** in the navigation pane, click **Add Clients.**
- **Workout Schedule**: On the **Workout Manager** tab, click **Workout Schedule**. Select the client name, and then click **Show Schedule**. In the **Manage Workout Schedule** section, in the **Schedule** column, click **Add**.
- **Exercise**: On the **Workout Manager** tab, click **Configure Exercises**. On the **Custom Exercise Library** screen, click **Add New Exercise**.
- **New Goal Period**: On the **Goal & Assessment** tab, click **Start New Goal Period**.

How to view

- **Recommended Products**: On the **Dashboard** tab, in the navigation pane, click **Visit My eShop**.
- **All Other Products**: On the **Dashboard** tab, in the navigation pane, click **Visit My eShop**.
- **Reports:** On the **Reports** tab, click **Trainer's Products Sale Report** or **Trainer's Licences Report**.
- **Calendar**: On the **Dashboard** tab, in the **Schedule** section click **View Calendar**.
- **Current Progress**: On the **Goal & Assessment** tab, click **View Current Progress**.
- **My Schedule**: On the **Dashboard** tab, in the **Schedule** section, click **View Calendar**. OR
  On the **Client & Schedule** tab, click **Manage My Schedule**.
- **Comments to Me**: On the **Dashboard** tab, in the **Fitness Log** section, click the **Me** tab.
- **Comments to My Clients**: On the **Dashboard** tab, in the **Fitness Log** section, click the **My Clients** tab.
- **All My Clients**: On the **Dashboard** tab, in the **My Clients** section, click **View All Clients**.
  OR
  On the **Client & Schedule** tab, click **Client Management**. In the **Client Profile** column, click **View**.
- **News Feed**: On the **Dashboard** tab, in the navigation pane, view the **News Feed**.

Browser Compatibility and Resolution:

The PT Portal application is best viewed in **Internet Explorer 9** with the preferred resolution of 1024*768.

Help:

The **Help** is available from any screen on the PT Portal application. By clicking the **Help** icon, the user is taken to a dynamic pop-up window that describes the current screen.

Support:

The Support ▾ link is available from any screen on the PT Portal application. The **Support** link enables you to view and access the FAQs, Quick Reference Guide, User Guide, Video Tutorials, and Help.

Quick Reference Guide

How to record

- **Workout Activity**: On the **Workout Manager** tab, click **Record Workout Activity**.
- **Freestyle Workout**: On the **Workout Manager** tab, click **Freestyle Workout**.
- **Record Workout Schedule**: Click **Activity**.

How to manage

- **Testimonials**: On the **Dashboard** tab, in the **Testimonials** section, click **Manage Testimonial**.
- **Schedule**: On the **Dashboard** tab, in the navigation pane, click **Manage Schedule**. OR
  On the **Client & Schedule** tab, click **Manage My Schedule**.
- **Goals**: On the **Dashboard** tab, in the navigation pane, click **Manage Goals**. OR
  On the **Goals & Assessment** tab, click **Start New Goal Period**.
- **Workout**: On the **Dashboard** tab, in the navigation pane, click **Manage Workout**. OR
  On the **Workout Manager** tab, click **Create New Workout**.
- **Store**: On the **Dashboard** tab, in the navigation pane, click **Manage Stores**.
- **Exercise Library**: On the **Workout Manager** tab, click **Configure Exercises**.
- **Client**: On the **Client & Schedule** tab, click **Client Management**.

How to create

- **Workout**: On the **Workout Manager** tab, click **Create New Workout**.
- **Calendar Appointment Slot/Event**: On the **Client & Schedule** tab, click **Manage My Schedule,** and then click **Manage Calendar**.

How to close

- **Current Goal Period**: On the **Goals & Assessment** tab, click **Close Current Goal Period**. Select the client name, and then click **Close Goal Period**.

How to buy

- **Licences**: On the **Dashboard** tab, in the navigation pane, click **Buy Licences.**