udio

APP GUIDE

udio

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INTRODUCING THE UDIO APP

Dear Customer,

We're thrilled to introduce our brand-new customer portal app, designed to take your customer experience to the next level!

This handy app allows parents and students to easily manage their bookings, track progress, and stay updated with real-time information – all from their mobile devices.

Along with the app's fresh look and feel, we've also revamped the web-based customer portal, ensuring a seamless experience across all devices. In addition, we've added exciting new features like multiple person bookings to further enhance your customers' experience.

This guide will walk you through the app's customisation options, the benefits and key features and provides helpful guides and how-tos that you can also share with your customers.

As part of your App Package, we will provide a branding service to ensure the app reflects your brand perfectly. Your satisfaction is our priority, and we want to help you create a visually appealing experience for your customers.

Let's get started!

Kind regards,

Team Udio
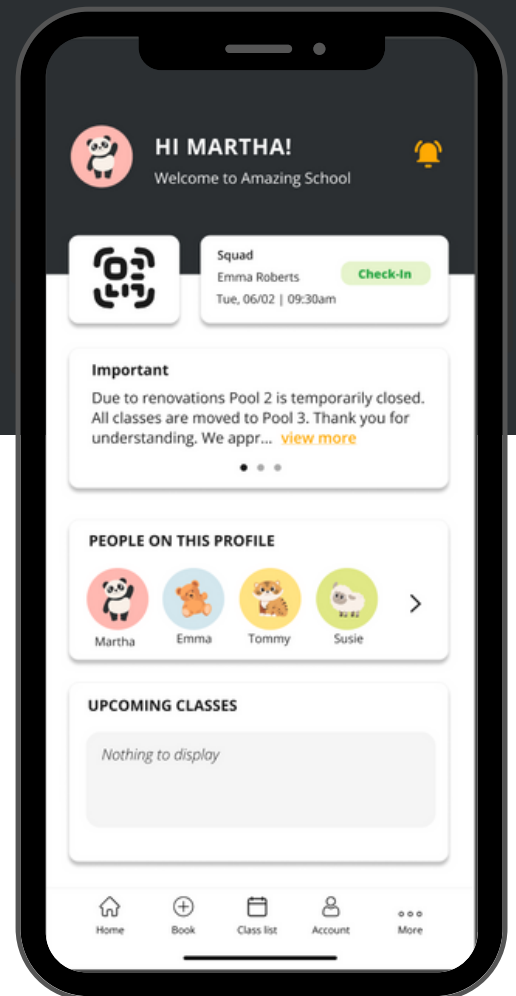
KEY FEATURES

Rest assured, your customers will still enjoy their favourite features, now with a fresh new design. Here's a glimpse of what our app has to offer:

1. Multiple Person Booking

We've made group bookings a breeze. Whether it's a family booking multiple classes or a group of friends signing up together, our app allows users to book multiple participants in one go. No more juggling multiple bookings or worrying about spots selling out—just a smooth, hassle-free experience that saves time and keeps everyone happy.
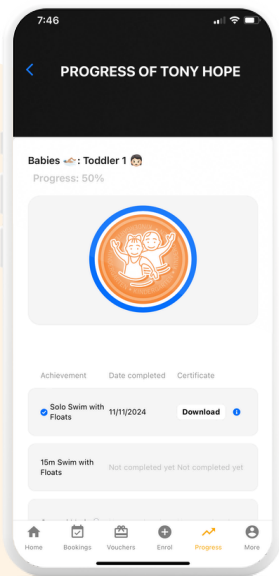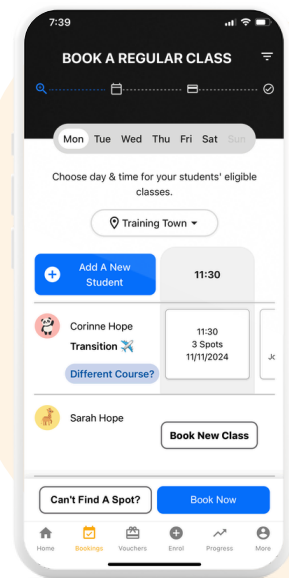
2. Progress Tracking

Everyone likes to see their progress, and our app makes it easy. With built-in progress tracking, users can monitor their achievements, milestones, and personal bests and download their certificates. This feature keeps users engaged and helps them appreciate the value of your programs.

3. Move and Cancel

Plans change, and we get that. Our app lets users move or cancel - we call it 'Can't Attend?' - their bookings with ease. Whether it's rescheduling a class or withdrawing from a session, they can manage it all in just a few taps—no phone calls or complicated processes required.
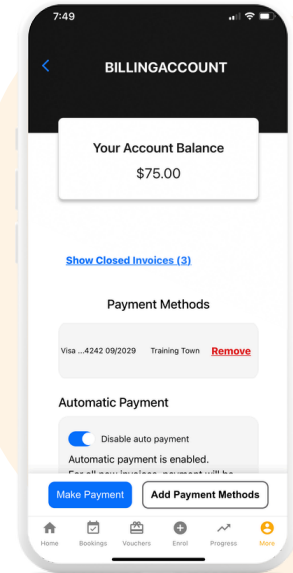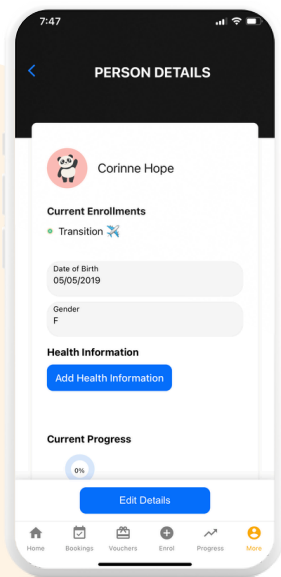
KEY FEATURES

4. Easy Payments

Simplify payments for your customers with secure, integrated payment options. Users can make payments directly within the app, view outstanding fees, and set up automatic payments, so they never miss a payment deadline.

5. Manage Profiles

Your customers can set up and manage personalised profiles for each family member, tracking progress, class history, and health notes. This feature keeps everything organised in one place, making it easier for families to stay on top of their bookings and progress.

6. Easy Check-In

As the class date approaches, it moves to the top of the dashboard for easy access. Plus, the simple check-in option lets users check in for a class with a tap—making their experience smoother and more efficient.
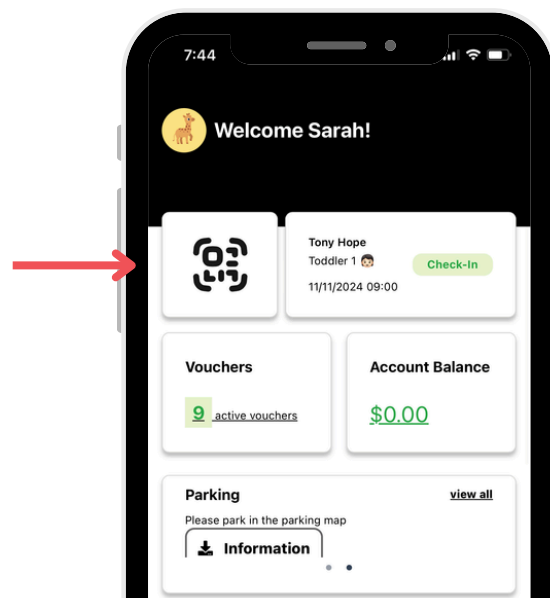
BRANDING SERVICE

As one of the first adopters of our new app, we're offering a **full branding service** to ensure your app reflects your business identity seamlessly.

From logos to colour schemes, we'll work with you to create an app that feels like an extension of your brand, delivering a consistent and engaging experience for your customers.

To get started, simply provide the following details, and we'll take care of the rest to customise the app to perfectly align with your brand:

1. In-App Logo

To personalise your Udio app and showcase your brand, please provide our App Team with a high-quality square logo. This logo will appear prominently during sign-up and throughout the app, reinforcing your brand identity.

For the best display, we recommend the following logo specifications:

- High-quality PNG
- Transparent background
- Square or round
- Light-coloured design (background will be dark)

Examples:
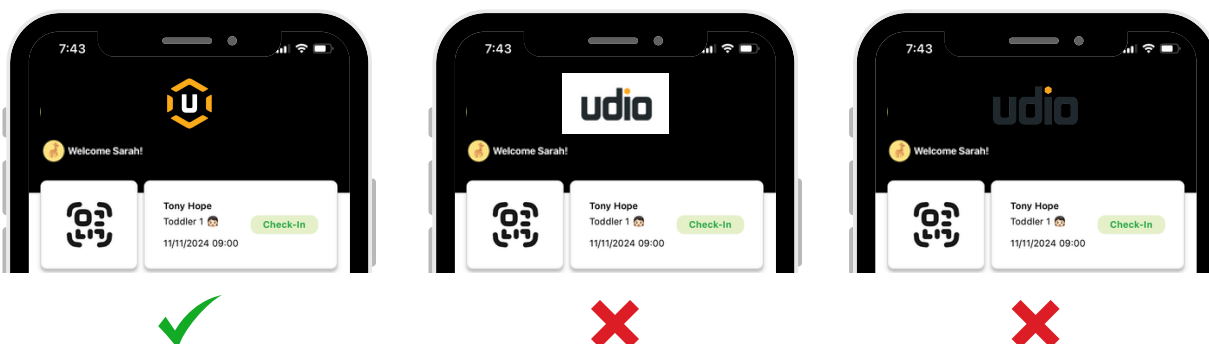
2. App Logo

Your app will be listed in the App Store and Google Play Store under your business name. For example, if your business is called Kelly's Dance, that's exactly what your customers will search for in their preferred store.

Your app icon will feature your business logo, providing a recognisable and professional look. Just ensure the logo is in a square format. If you prefer, you can use the same logo provided earlier, as long as it meets the square dimensions.
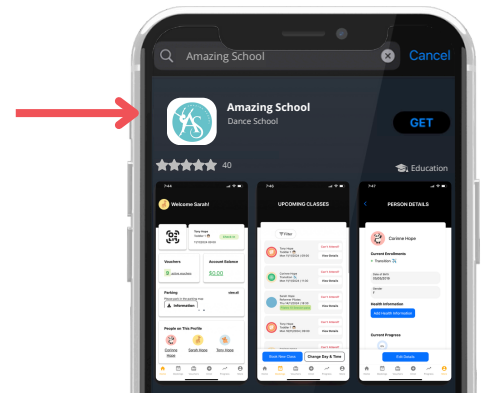
3. App Splash Screen

What's a splash screen, you ask? Great question! A splash screen is the first thing your customers see when they open the app—it's displayed briefly while the app loads.

If you don't have a specific image in mind, no worries—we'll simply display your logo again to keep things consistent and professional.

Examples:

We'll adjust the image you provide to ensure it fits perfectly on the screen. To avoid cropping any important details, please make sure to leave adequate margins around your image.

4. Brand Colours

Udio allows you to incorporate your brand colours into the app, making it visually cohesive with your overall branding. You can choose two colours - your main colour and your secondary colour. These colours will be used throughout the app for buttons, links, headers, and other elements. Please provide us with your preferred colour choice using the hex code format (#FFAA05)

- **Main Colour:**

Used for main elements like buttons and highlights.

- **Secondary Colour:**

Used for background (please ensure this is a darker shade)

Example:

- Main Colour: ■ #26B4B3 (used for main action buttons)
- Secondary Colour: ■ #202F79 (used for your background)
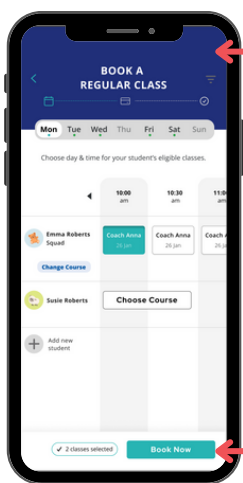
Secondary Colour

Main Colour

Requirement:

For the best contrast and accessibility, please opt for a darker shade as your secondary colour, as this will be used for backgrounds and navigation bars.

If you are unsure if your two selected colours meet the requirements, you can check your contrast score here:

Contrast Checker

Further customisation options in your control:

Just like you could do before, the app also comes with further customisation options that you can adjust in your Settings.
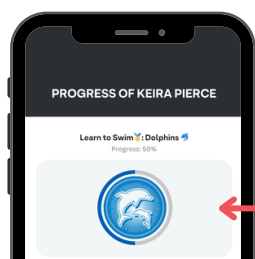
5. Course Icons

If you've already uploaded course icons to your customer portal, these will automatically appear in the app—no extra steps needed! If you haven't uploaded icons yet, don't worry—we'll use standard placeholders until you're ready.

To ensure your course icons look their best, please follow these guidelines:

- Round icons are ideal for a clean and seamless display.
- If using square images, leave space around the edges to prevent any part of the image from being cropped.

Example:

Course icons are displayed in a round format throughout the app and portal, appearing in key areas like Progress, Upcoming Bookings, and more.

6. Customisable Texts

Rest assured—your course descriptions and customer notices will carry over seamlessly from the customer portal. You can change them in the same spot as you did before. Plus, we provide additional text options for you to customise.

- **Course Descriptions:**
These will automatically sync from the customer portal, so you can update them as usual by navigating to:
Settings > Programmes & Courses > Configure Courses

- **Customer Notices:**
Customer notices will remain in their existing location. To make changes or add new ones, simply go to:
*Settings > Customer Accounts > Customer Notices.*

- **Booking Confirmation Text:**

Personalise the message your customers will be shown after confirming a booking. Use this space to share helpful details like parking availability, what to bring, or any location-specific information.

This message is set individually for each facility. If you operate multiple locations, you'll need to customise the message for each one.

To update or modify the message, go to:
*Settings > Locations > Facility List*

Click on the relevant facility, then click on 'Edit Facility'. Under 'Customer accounts enrollment notes' you can add your personalised message.
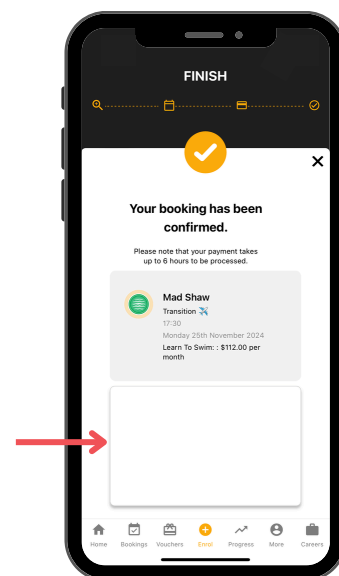
7. Change the Navigation Bar

You can customise the order of tabs on your navigation bar based on what's most relevant to your customers. If, for example, Vouchers are a higher priority than Progress, simply adjust the order in your App settings.

Only seven icons can be displayed on the main navigation bar, with the remaining tabs accessible under 'More'.
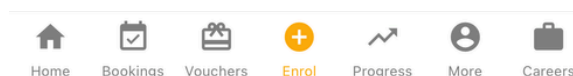
We recommend limiting the navigation to six icons for an intuitive and user-friendly experience.

To customise the navigation bar, head to:
Settings > Account > Mobile App Setup

Click on *App Sections.* Here you can add, edit, move, and delete sections. You can also rename icons, choose different icons, and adjust the order to best suit your customers' needs.

Note: Please <u>do not</u> remove essential icons, such as the home button.
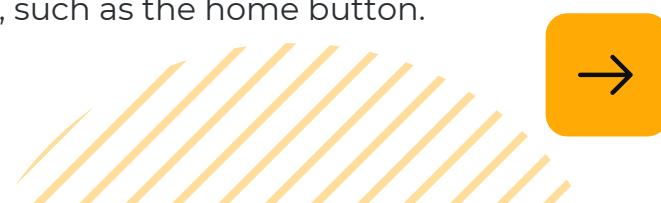
8. Add your own Links and Icons

While in the *App Sections* (as outlined above), you can also customise the navigation bar icons to redirect users to your own URLs. For example, you can link your website, internet shop or any other external URL, and it will seamlessly open within the app environment for a streamlined user experience.

To do so, click on *Add App Section* :

App Sections

Add App Section

Icon:

Enter id of Material UI Icon

Target:

Homepage
Enrol Section
✓ Booking Section
People Section
Vouchers Section
Progress Section
More Section
Custom URL

Label:

Target url:

Confirm   ← Go back

Click on the orange highlighted link to open a library of icons. Click on the preferred icon and copy the icon name and paste it into the field.

From the Target drop down please select 'Custom URL'

In the label section you can fill in your section name, such as 'Website'

Type in the URL that you want to use, such as https://www.mywebsite.com

HOW TO GET THE APP →

Due to high demand and our commitment to ensuring that each business's customisation options are fully met, we've decided to implement a **waitlist** for the app launch.

This will allow us to create an app that follows your colour scheme and branding.

1. Ensure your Subscription plan includes the Udio App

Before joining the waitlist, please ensure that your current subscription plan includes access to the app. If your plan doesn't include the app, you may need to upgrade.

BUILD	GROW	ELEVATE
Not included	Included ($350 setup fee)	Included

If your plan does not include the app, you can simply upgrade your plan by navigating to **Settings** in your Udio Account, click on **Udio Account** under Subscriptions and click on **Change Plan**.

2. Payment Provider

To be able to provide the best customer experience, our app is optimised to work seamlessly with two preferred payment gateways: Udio Pay and Stripe.

If you're already using one of these providers, no action is needed. However, if you're using a different payment provider, please reach out to us, and we'll assist you in transitioning to Udio Pay.

What is Udio Pay? Find out more here.

3. Join the Waitlist!

As an early adopter of our app, we are offering a branding service to ensure your app reflects your business. To ensure this process is as seamless as possible, we will add you to our waitlist. Click the button below to send us an email, and we'll confirm you're on the right subscription plan and payment gateway.

While you're on the waitlist, we'll request the above mentioned information, such as your logo and brand colours and begin the customisation process.

Join the Waitlist

4. Provide the requested Material

As mentioned, we will request more information from you. So be sure to read the branding section to have the material ready to go:

- Logo for in-app display and app icon
- Splash screen image
- Hex codes for main and secondary colour

Course descriptions and icons will be the same as your existing web-based customer portal. If you want this changes, please let us know. Once we have everything we need, we'll begin customising your app to perfectly align with your brand.

5. Prepare your Customers

Since your customers will be the ones using the app, it's important to inform them about the launch.

Once your app is ready, we'll notify you via email. From there, you can share the exciting news with your customers. We recommend setting up an email through Udio to provide clear instructions on how they can download and start using the app.

We have created a **User Guide** that highlights the key features and functionalities of the app for your customers. You can find the guide below or access it on our website. We recommend including a link to this guide in your app launch email or adding it to your website, making it easy for customers to access and get familiar with the app.

NAVIGATING THE APP

FOR STAFF

The app is a reflection of the existing web-based customer portal, meaning it's managed in the same way. Any changes you make to the customer portal will automatically reflect in the app. Whether you're updating course descriptions, icons, or adding customer notices, these changes will be visible in both the web and mobile versions of the portal.

For example: If you want to add customer notices, you will still go to Settings > Customer Accounts > Customer Notices as previously to add or change notices for both mobile and desktop-view.

The app, however, comes with some additional *Settings* that can be found under *Settings > Account > Mobile App Setup*.

Here you can:

- Change your App name
- Add an App icon
- Add a Splash Screen image
- View your App Sections (this is the navigation bar)
  - Add, move, edit or delete app sections
  - Change icons
  - Add URLs
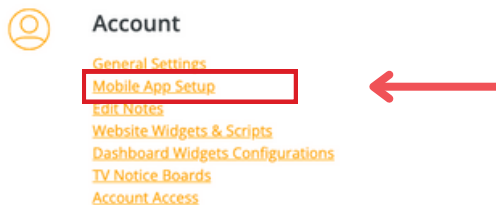
FAQS

To address your most pressing questions, we've compiled answers to the most frequently asked ones. If you have any other queries, don't hesitate to reach out to us.

Are the app and customer portal the same?

Yes, the app is a mobile extension of your existing web-based customer portal. Any changes you make for the portal will automatically reflect in the app. You manage everything in the same way.

How can my customers download the app?

Your customers will type in your business name into either App Store (for iOS) or Play Store (for Android) and download it like any other app.

Do my customers need a new login for the app?

No, your existing customers can use the same login credentials they use for your web-based customer portal as it is the same. New customers will have to complete the signup process.

What support is available if we encounter issues?

Our dedicated support team is available to assist with any issues you may encounter. Please reach out to app@udiosystems.com and we will get back to you as soon as possible. Further resources are also available in Help Centre.

Can we customise the app to match our branding?

Yes, the app can be customised to reflect your branding, including your logo and colour scheme. As part of your App Package we will do the branding for you.

FAQS

Will this impact our billing process?

No, the launch of the app will not impact your current billing process. All billing and invoicing will continue as usual, and the app integrates seamlessly with your existing systems.

Will my customers have to re-enter their bank details?

No, everything is still saved to make sure that the app adoption is as smooth as possible for your customers.

Will the app support all the features we currently use?

Yes, the app includes all the core features you use and more. We've made sure it aligns with your current needs and enhances your capabilities.

Are there any additional costs associated with the new app?

The app is included at no extra cost for customers on the *Elevate* plan. If you're on the *Grow* plan, there's a $350 setup fee, which covers our branding service as well. Unfortunately, the app is not available for customers on the *Build* plan. If you are on the *Build* plan and would like to use the app, please upgrade to a higher subscription plan.

USER GUIDE

The following guide provides guidance on how to navigate the new customer app.

1. Download & Sign Up

Please navigate to either App Store for iOS or Play Store for Android and type in the name of the business you are a customer of.

Once downloaded, open the app and start your login or sign up. If you are a **new customer**, please follow the sign up prompts to create your account. Your account details are both valid for the web version and the app. We ask for an email confirmation so please ensure your details are accurate.

If you are an existing customer, you can simply login with your existing login information and your data will be imported.

2. Enrol Myself vs. Enrol Another Student

This button will only show up for new customers, so if you are an existing customer, please skip this step.

The app is designed to accommodate both group bookings (like parents booking for their children) and individual bookings with ease.

- For individual bookings, simply select "Enrol Myself."
- If you're booking for others or plan to manage bookings for yourself AND other students, choose "Enrol Another Student" to open a form for adding more students.

Additional students can be added at anytime through the portal, making managing multiple bookings straightforward and flexible.

3. Your First Booking

After you have successfully created more student profiles or proceeded with your own account, you can start your first booking. For new customers this process will open up straight away, for existing customers you can find this option in the *Enrol* tab.

3.1 Choose your Course

Please select 'Book New Class' next to the name of the student you want to book. Then select program and course (you can always change this later if needed). The courses displayed for each student are based on age or other eligibility requirements.
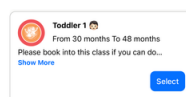
1. Click 'Book New Class'

Book New Class

2. Select Course Programme

Babies   Squad

Private Lessons   Assessments

School Holiday Programme

3. Select Course

Toddler 1
From 30 months To 48 months
Please book into this class if you can do...
Show More
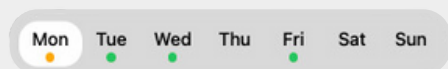
Select

3.2 Select day and time

After your course is selected, you will be shown the dates and times this course is available on. You can toggle between the different week days up top and select the time you want to book in for. You can book another student by following the same prompts or continue with your single booking.

Mon   Tue   Wed   Thu   Fri   Sat   Sun

The green dots under the weekdays indicate available spots, whereas orange dots indicate weekdays where you already have a booking.

3.3 Select your Start Date and Package

Select the date you want to start your first booking and select a package.

3.4 Add a Payment

Once you've selected your start date and package, your booking will be held for 10 minutes. To complete your reservation, please enter your payment details. You can set up automatic payments, so your information is saved and payments are automatically processed each cycle. Or, if you prefer, choose to pay manually by bank transfer.

→

3.5 Booking Confirmation

Your booking is now confirmed! You will receive a booking confirmation.

4. Home Screen

Your home screen shows you the most important information in one convenient spot.

4.1 Check-in Option

At the top, you'll see a QR code. If you have a booking ready for check-in, it will display right next to the code. Simply open it and scan it at the facility for seamless access.

4.2. Vouchers

Just below, you'll see the number of vouchers available to you. This widget is clickable and will take you directly to the *Vouchers* tab. Alternatively, you can access it from the navigation bar or in the *More* tab, where you'll also be able to make voucher bookings.

4.3. Account Balance

Your account balance is displayed right next to it. A green balance indicates a credit, while red means an outstanding amount. This widget is also clickable, taking you directly to the *Billing* tab, where you can view past and current invoices, manage your payment options, and settle any outstanding payments.

4.4 People on this Profile

This widget displays the students associated with your profile. You can scroll through the list and find a plus icon at the end to add new students. Clicking on any profile icon will take you directly to that student's profile.
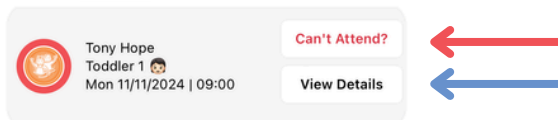
4.5 Upcoming Bookings

Below, you'll find your Upcoming Bookings, which display the student's name, an option to mark them as "Can't Attend," and a "View Details" button. You can also select "View All" to open the *Upcoming Bookings* tab, which you can also access through the navigation bar.
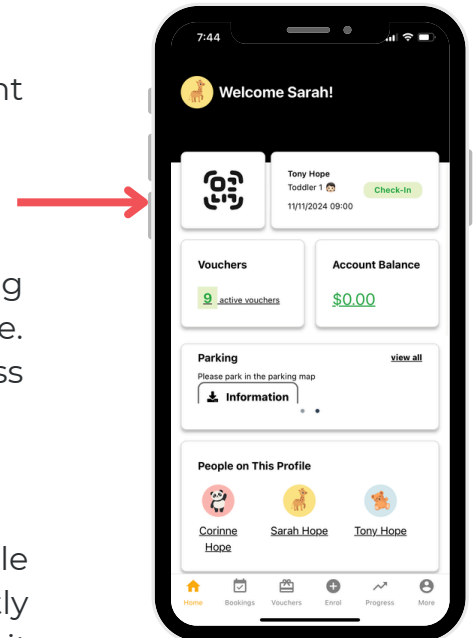
5. Can't attend?

If you can't make it to a class, please use the 'Can't Attend' option that is displayed next to a booking (see red arrow below). Depending on the business, you will be issued a makeup voucher or a refund. Please note that this option is for individual classes only and won't affect your overall enrolment.


6. View Booking Details

To view details about an upcoming booking, simply click into the grey field (see blue arrow above) that holds the booking information. You will be redirected to a separate screen with more information and the option to either cancel your booking or change day / time.

7. Change day or time of a class

Need to reschedule? No worries! If your availability changes, you can easily switch the booking to a new day or time. Just head to *Upcoming Bookings*, click 'Change Day / Time', and follow these simple steps:

- Unselect your current class time.
- Choose your new class time from the available options.
- Select your preferred start date for the new class.
- Confirm the changes, and you're all set!

This flexibility ensures that even with a busy schedule, you can keep attending classes at times that suit you best.
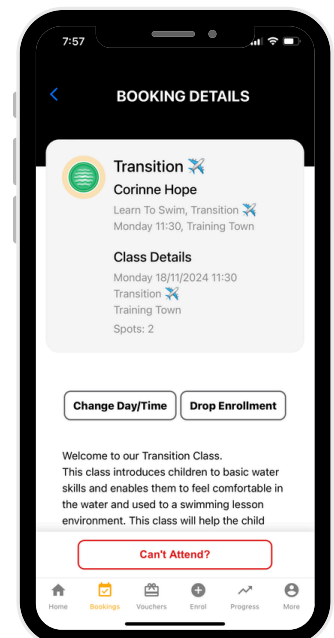
8. Booking with Vouchers

Got a voucher? Great! Simply go to the *Vouchers* section in the navigation bar, select **Voucher Booking**, and follow the same steps you would for a regular booking. It's as easy as that!

Note: If you don't see the Voucher tab, it means there are currently no vouchers available on your account.

9. Track Progress and Results

9.1 Track Progress

Keeping tabs on progress has never been easier! You can view a student's achievements by heading to the *Progress* tab or by navigating through their individual profile. As students complete their milestones and assessments, their results will be displayed here. You'll also have the option to download achievement certificates, celebrating the student's hard work and progress.

9.2 View Results

Depending on the type of class you are attending, Results might not be visible. Otherwise, the results tab will appear on the navigation bar.

10. More...

Your account options are all in one convenient place under the *More* section. Here, you can update your contact details, manage your billing account, change your password, or log out—everything you need to keep your details up to date.

10.1 Contact Details

Need to update your phone number or add an emergency contact? Under More > Contact Details, you can easily view or edit your information to ensure everything is accurate and up to date.

10.2 Billing

Head to More > Billing to view past invoices and download them as PDFs. You'll also see your current account balance with options to make a payment, enable auto-pay or add a new payment method, so your billing is always sorted and stress-free.

10.3 Change Password and Sign Out

In the *More* section, you can also update your password or sign out.

11. Add another Student

Missed adding a student during sign-up? No problem! There are multiple ways to add a new student to your account:

- **From the Dashboard:** In the top-right corner, you'll see icons representing your student profiles. Scroll to the right until you find the plus (+) icon, which allows you to easily add more students.

- **During the Booking Process:** While in the timetable view, you'll find the option to add more students located to the left of the time stamps.

- **In the People Tab:** Simply head to the People tab in the top-right corner, where you'll see another button to add new students.

These quick options make it simple to add students whenever needed!

12. Add Student to Waiting List

Your preferred class might not always have an open spot, but you can easily join the waiting list by clicking 'Join the Waiting List' and filling out the necessary details. Choose your preferred weekdays, course, facility, and start time.
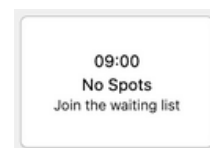
Once you're added, your request will appear under the Waiting List tab, and you'll receive a notification as soon as a spot becomes available.

13. People

The People tab gives you the option to view individual student profiles or to add a new student. In the profile you will be able to Add Health Information, view progress, results and upcoming classes for this student.

13.1 Add Health Information

Navigate to the student's profile, then select 'Add Health Information' to input the necessary details.

⊞ Add Health Information

13.2 Edit Details

When in the student profile you also have the option to edit the profile. This allows you to change name, birthday, gender and profile icon.