

6.1.1 Step 1 — Create the bowler profile

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KEY

workflow

Drilling your first ball in Spectre Cloud begins before you ever touch the drill press — it starts with setting up the bowler's profile. The **bowler profile** is the foundation every spec sheet, arsenal entry, and drilling history record is built on. Getting it right the first time means every future visit for that bowler is faster, more accurate, and fully traceable. This page walks through Step 1 of the complete first-ball workflow: creating the bowler profile from scratch.

☐☐ What a Bowler Profile Contains

A bowler profile in Spectre Cloud stores the identifying information that connects a person to all of their spec sheets and arsenal entries. At its most basic it requires only a name — but taking a few extra minutes to complete the full profile pays off every time that bowler returns to the shop.

- ☐ **Full name** — used to find the bowler quickly across search and the bowler list.
- ☐ **Contact information** — phone number and/or email for follow-up and ball-ready notifications.
- ☐ **Notes field** — free-text space for anything relevant: dominant hand, grip preferences, physical considerations, equipment history summary.
- ☐ **Address and consent signature** — available with the **Bowler Plus** plugin (), useful for shops that maintain full client records or require a fitting consent form.

- **Photo gallery** — also available with Bowler Plus, for storing hand photos, span reference images, or before/after fitting documentation.

Creating a Bowler Profile on Desktop

1. From any screen, click the **BOWLERS** button in the top navigation menu.
2. The bowler list opens. Click the + **New Bowler** button (top right of the list).
3. The new bowler form opens. Enter the bowler's **full name** in the Name field — this is the only required field.
4. Add a **phone number** and/or **email address** if available.
5. Add any relevant **notes** in the Notes field — dominant hand, grip style, known preferences, or anything useful for future visits.
6. If your shop uses the **Bowler Plus** plugin, complete the address fields and capture a consent signature if required by your shop policy.
7. Click **Save**. The profile is created and added to your bowler list immediately.

Creating a Bowler Profile on Mobile

1. Tap the **avatar icon** in the top navigation bar to open the bowler section.
2. Tap the + **New Bowler** button.
3. Enter the bowler's **full name**. This is the only required field.
4. Add contact details and notes as available.
5. Tap **Save** to create the profile.

Tip: On mobile, the bowler form is optimised for quick entry — the name field is focused automatically when the form opens, so you can start typing immediately without tapping into the field first.

Checking for an Existing Profile First

Before creating a new profile, always search for the bowler to avoid duplicates. A bowler who visited a colleague's shift, or whose profile was created during a phone enquiry, may already exist in your system.

1. Open the **BOWLERS** list (desktop) or tap the **avatar icon** (mobile).
2. Use the **search bar** at the top of the list to search by first name, last name, or partial name.
3. If the bowler appears in results, open their existing profile rather than creating a new one.
4. If no match is found, proceed with creating a new profile as described above.

Note: Spectre Cloud does not automatically detect or merge duplicate profiles. If a bowler ends up with two profiles, their spec sheet history will be split between them. Keeping the bowler list clean from the start is easier than reconciling duplicates later.

Best Practices for the Notes Field

The Notes field is one of the most useful parts of the bowler profile for day-to-day shop operation. A well-maintained notes field means any staff member can pick up a returning bowler's visit without starting from scratch. Consider recording:

- Dominant hand — especially important in a busy shop where it is easy to assume.
- Grip type preference — fingertip, conventional, semi-fingertip.
- Any physical considerations — arthritis, injury history, unusual hand geometry.
- Equipment preferences — ball weight, surface preferences, brands the bowler likes or dislikes.
- Communication preferences — does this bowler prefer a call or a text when their ball is ready?
- Do not store sensitive personal information — medical details, financial information, or anything beyond what is relevant to the fitting relationship — in the Notes field unless your shop has a clear policy and the appropriate consent in place.

Profile Sync and Availability

Once saved, the bowler profile is immediately available across all devices logged into your Spectre Cloud account. If you create a profile on your desktop at the counter and then move to a tablet at the drill press, the profile — and any spec sheets you attach to it — will be there waiting.

- Profiles sync instantly across devices on an active internet connection.

- The profile is visible to all staff members logged into the same shop account.
- If the account becomes inactive, profiles and their associated records remain accessible in read-only mode.

► What Comes Next

Once the bowler profile is saved, you are ready to move to Step 2: taking the bowler's hand measurements and entering them into a new spec sheet. The profile you just created will be the parent record that spec sheet is attached to — so every drilling decision made in the following steps is permanently linked to this bowler's history.

Related Sections

- 6.1.2 — Step 2: Taking and entering hand measurements
- 6.1.3 — Step 3: Setting span and pitch values
- 03.x — Bowlers (Clients): managing your bowler list
- 08.x — Account and Business: managing staff access
- 01.x — Getting Started: how to sign up and configure your shop

Tip: If a bowler is in a hurry and you only have time to enter a name before moving to the spec sheet, that is fine — you can always come back and fill in contact details and notes after the fitting. The name alone is enough to get the workflow moving.

Revision #2

Created 11 May 2026 16:04:53 by Admin

Updated 2 June 2026 15:56:53 by Art