

FNKY Rooster Designs, LLC

PeptideCRM

User Guide

Everything you need to run your practice from your phone or iPad — clients, peptide library, vial inventory, assignments, reminders, reports, and encrypted backups. Your data lives on this device.

Guide v1.0 — App version 1.0.0

For Research Use Only. Not medical advice.

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New here?

Read the quick start, then the peptide and inventory section. Those two cover the setup everything else builds on.

SECTION 1

Quick start

Six steps take you from a fresh install to your first tracked sale.

- 1 Create your account.** Accept the research-use disclaimer, then sign up with Apple, Google, or an email and password. The account is created on this device — there is no server login.
- 2 Turn on the lock.** In **Settings > Security**, enable Face ID / Touch ID so your client list is protected if someone else picks up your device.
- 3 Review the peptide library.** Open the **Peptides** tab. A starter library is preloaded. Add your own peptides or pre-mixed blends with the + button.
- 4 Add vial sizes and stock.** Open a peptide, add a vial size, then add a batch with quantity, wholesale cost, and your retail price. This is what makes inventory, profit, and low-stock alerts work.
- 5 Add a client.** On the **Clients** tab, tap + and fill in contact details. Tap **Assign** on the client's card to sell them a vial — stock comes down and the sale enters your reports automatically.
- 6 Set a backup password and back up.** In **Settings > Backup & Data**, set a password, then tap **Backup Now** and save the file somewhere you control.

Want to explore first?

Settings > Reports > Load Demo Data adds sample clients, assignments, and reminders so you can look around. You can delete them at any time.

SECTION 2

How your data is stored

PeptideCRM is a local-first app. Your clients, inventory, pricing, and notes are stored in a database on your device — not in our cloud. Nobody at FNKY Rooster Designs can see your records, reset your password, or recover your data for you.

What that means in practice

- **You own the backups.** If you lose the device without a backup file, the data is gone. Back up regularly and store the file where you can find it.
- **No sync between devices.** Moving to a new iPhone or iPad means creating a backup on the old device and restoring it on the new one.
- **Your exports stay available.** Backup, restore, and CSV export keep working even if your subscription lapses. Your business data is yours.
- **Automatic safety net.** The app writes a local backup when you leave it, and keeps the last several days under **Settings > Local Backups**.

Set a backup password first

Backup files are encrypted with the password you set in **Settings > Backup Password**. Store that password somewhere safe — a backup file cannot be restored without it.

SECTION 3

Signing in and locking the app

Sign-in options

You can sign in with Apple, Google, or an email address and password. All three link to the same local account, so switching methods later does not split your data.

If you use Apple or Google sign-in

Add a password backup from **Settings > Account > Add a Password Backup**. It gives you a second way into your own data if the provider sign-in ever fails on this device.

Screen lock

- **Biometric Lock** — Face ID or Touch ID on launch and after the app has been idle. Toggle it in **Settings > Security**.
- **Session timeout** — after five idle minutes the app locks itself again.
- **Screenshot protection** — client screens are shielded from casual screen capture.

Signing out never deletes data

Sign Out only ends the session; everything stays on the device. **Delete Account & Data** in the Danger Zone is the only action that erases your records, and it cannot be undone.

SECTION 4

Dashboard

The Dashboard is your practice overview. Every card is tappable and takes you straight to the underlying list.

On the Dashboard	What it tells you
Active Clients	How many clients are currently marked active.
Peptides	How many peptides are in your library.
Reminders	Follow-ups that are still pending.
Overdue	Reminders past their due date — clear these first.
Low Stock Alerts	Vials that have hit the low-stock threshold you set.
Reorder Suggestions	What to reorder, based on what you have been selling.
Recent Clients	The clients you touched most recently.
Upcoming Reminders	What is due next, in date order.
Sales Reports	Shortcut into revenue, profit, and top sellers.

Your current plan is always shown on the Dashboard, so you can see at a glance whether you are on a trial, Pro, or Pro XL.

SECTION 5

Clients

Adding and editing

Tap + on the Clients tab to add someone. You can record contact details, status, notes, and health-profile fields such as date of birth, height, weight, goals, allergies, and current medications. Everything is editable later from the client's card.

The client card

- **Assigned peptides** — what this client is on, with the vial size and the price you charged. Tap **Assign** to add, **Reorder** for a repeat sale, or **Remove** to take one off.
- **History** — a running log of contact and activity so you can pick a conversation back up months later.
- **Reminders** — follow-ups tied to this client.
- **Referrer** — link the client who referred them so referral rewards and the referral tracker stay accurate.

Finding people fast

Use the search box at the top of the Clients tab, or the global search screen to look across clients and peptides at once.

Deleted something by accident?

Most deletions offer an immediate undo. If you have already left the screen, restore your most recent backup instead of re-entering everything by hand.

SECTION 6

Peptides, vial sizes and inventory

The Peptides tab is both your reference library and your stockroom. Peptides are grouped by category; anything you create yourself is tagged **Custom** and is kept through library updates and included in backups.

Inside a peptide

Section	What it is for
About	Reference notes on the peptide.
Default Protocol	The starting point you normally use, so you are not looking it up every time.
Vial Inventory	The vial sizes you actually sell — each with its own stock, cost, and price.
Batches	Individual lots inside a vial size, with quantity on hand, tested milligrams, and purity.

Setting up a vial size

- 1 Open the peptide and tap **Add Vial Size** (for example 5 mg).
- 2 Enter your **wholesale cost** — profit reporting is based on it.
- 3 Enter the **retail price** you normally charge. You can still override it per client when you assign.
- 4 Set the **low-stock threshold** so the Dashboard warns you early.
- 5 Add a **batch** with the quantity received. Tap any vial or batch to edit it later.

Adding your own peptides and blends

The + button offers **Custom Peptide / Blend** for a single new peptide or pre-mixed vial. On Pro XL it also offers **Custom Stacks** — see the next section.

SECTION 7

Assigning peptides and stacks

Assigning is how a sale gets recorded. It deducts the vial from stock, stores the price for that client, and feeds the sale into your reports in one step, so inventory and revenue never drift apart.

To assign

- 1 Open the client and tap **Assign**.
- 2 Pick the peptide and vial size. Several items can go in one assignment.
- 3 Adjust the price if this client pays something other than your standard rate.
- 4 Confirm. Stock goes down, the sale is logged, and the item appears on the client's card.

Repeat orders and removals

- **Reorder** repeats a previous item at the same vial size — the fastest way to log a refill.
- **Remove** takes an item off the client's list. Use it for corrections; it keeps inventory honest.
- **Edit** an existing assignment to change its dose, frequency, or this client's price at any time — the price you set here always sticks to this one client and never gets overwritten by your standard rate.

Custom Stacks

A stack is a combination you sell often, saved once and assigned with one tap afterwards. It holds its peptides and quantities plus an optional discount for the whole transaction. Assigning a stack deducts every item; the discount is reported on its own line and netted into revenue and profit.

Custom Stacks is a Pro XL feature

Stacks you have already created are never deleted if your plan changes — they simply stop being assignable until Pro XL is active again.

SECTION 8

Calculate

The Calculate tab converts units. Enter the vial strength, the amount of BAC water you added, and the amount you want — it returns the concentration and the volume that corresponds to it.

Field	What to enter
Vial strength	Total milligrams in the vial (for example 5).
BAC water	Millilitres of bacteriostatic water added to the vial (for example 2).
Desired amount	The amount you want expressed, in mcg or mg (for example 250).

Results show **concentration** and **calculated volume**, with a quick reference below and **Clear & Calculate Again** to reset.

This is a unit converter

Calculate performs arithmetic on the numbers you type. It does not recommend, validate, or verify any amount for any purpose, and nothing in PeptideCRM is medical advice. For Research Use Only.

SECTION 9

Reminders

Reminders are your follow-up queue: check in after a first order, chase a refill, call someone back. The tab counts **Pending**, **Overdue**, and **Done**, and anything past due is flagged **OVERDUE**.

- Create a reminder from the Reminders tab or from a client's card so it stays attached to that person.
- Mark reminders done as you work through them — the Dashboard counts update immediately.
- Turn on **Reminder Alerts** in **Settings > Notifications** to be notified when one is due. Turn on **Low Stock Alerts** to hear about inventory before a client asks.

Not getting notifications?

iOS controls this. If the toggle will not stay on, allow notifications for PeptideCRM in the iOS Settings app, then switch it back on here.

SECTION 10

Sales reports and referrals

Sales Reports

Open **Settings > Sales Reports**, or tap the Sales Reports card on the Dashboard. Choose **Today, This Week, This Month, This year**, or a **Custom** range.

In the report	What you see
Revenue	What you charged in the selected range.
Profit	Revenue minus the wholesale cost you recorded on each vial size.
Units Sold	Total vials assigned.
Avg Sale	Average value per sale.
Revenue Trend	How the range moved over time.
Top Peptides / Vial Sizes	Your best sellers, ranked.
Top Clients	Who buys the most.
Stack Discounts	Discounts given on stack assignments, listed separately.

Export CSV saves the report through the iOS share sheet, so you can send it to your accountant or open it in a spreadsheet.

Referrals

- **Referral Tracker** shows who referred whom, based on the referrer you link on each client card.
- **Referral Campaign** holds your current reward offer, so credit is applied consistently when a referred client buys.

SECTION 11

Backups, restore and export

Everything here lives in **Settings > Backup & Data**.

Action	What it does
Backup Password	Sets the password future backups are encrypted with. Do this first.
Backup Now	Creates an encrypted backup file and opens the share sheet so you can save or send it.
Restore from Backup	Reads a backup file back in.
Local Backups	Automatic backups kept on this device.
Export to CSV	Exports your clients or inventory as spreadsheet files.
Import Clients / Inventory	Brings a spreadsheet in — see the import section (Pro XL).

Restoring correctly

- 1 Tap **Restore from Backup** and choose your backup file.
- 2 Enter the backup password that file was encrypted with.
- 3 The app reloads itself automatically as soon as the restore finishes — your clients, inventory, and history are back in place right away.

Back up before anything big

A restore, a device move, or a large import are all good moments to take a fresh backup first.

SECTION 12

Importing from a spreadsheet

Settings > Import Clients / Inventory brings an existing client list or stock list into PeptideCRM without retyping it. The import screen has two tabs — **Clients** and **Inventory**.

- 1 Pick the **Clients** or **Inventory** tab.
- 2 Tap **Download Template** and open it in your spreadsheet app. Read **How to edit the template** once — it lists the required fields.
- 3 Fill in your rows. Keep the header row exactly as it is and save as CSV. The filename can be anything as long as it ends in **.csv**.
- 4 Tap **Choose CSV File**, pick the file, and review the result. **Import Another File** lets you run the second list straight after.

How rows are matched

- A row with an existing ID **updates** that client or vial.
- A row with a blank or unrecognised ID **creates** a new record.
- Required fields must be present, or the row is reported instead of imported.

Bulk import is a Pro XL feature

CSV **export** is available on every plan, so you can always get your data out — import is the Pro XL side of the pair.

SECTION 13

Plans, trial and billing

PeptideCRM has two plans. Every new account starts with a 14-day free trial that includes Pro.

	Pro	Pro XL
Monthly	\$14.99	\$20.00
Yearly	\$150	\$200
Clients, library, inventory, assignments, reminders, reports, referrals, backups, CSV export	Included	Included
Spreadsheet import of clients and inventory	—	Included
Custom Stacks	—	Included
New features first	—	Included

Managing your subscription

- **Settings > Subscription** shows your current plan and opens **Manage Subscription**.
- **Upgrading** to Pro XL takes effect right away.
- **Switching from Pro XL down to Pro** is scheduled by Apple for your next billing date. Pro XL features stay available until the period you already paid for ends, and none of your Pro XL data is deleted.
- **Cancelling** keeps your access until the end of the current billing period. Backup and CSV export keep working afterwards.
- **Restore Purchases** is how a reinstall or a new device picks your subscription back up. Use the same Apple ID that bought it.

Subscriptions renew automatically unless cancelled at least 24 hours before the period ends. Billing is handled by Apple; manage or cancel any time in your Apple ID subscription settings.

SECTION 14

Settings reference

A map of every section in Settings.

Section	Contains
Account	User Guide, Change Password, Add a Password Backup, Sign Out.
Reports	Sales Reports, Referral Tracker, Referral Campaign, Load Demo Data.
Subscription	Current Plan, Manage Subscription, Restore Purchases.
Security	Session Timeout, Biometric Lock.
Backup & Data	Backup Now, Backup Password, Restore from Backup, Local Backups, Export to CSV, Import Clients / Inventory.
Notifications	Reminder Alerts, Low Stock Alerts.
Legal	Privacy Policy, Terms of Service, Support.
Danger Zone	Delete Account & Data — permanent.

Delete Account & Data is final

It removes your account and every record on this device. There is no server copy and no way for support to bring it back. Export or back up first if there is any chance you will want the data again.

SECTION 15

Troubleshooting

A restore finished but data looks missing

The app reloads itself automatically right after a restore, so this shouldn't happen. If it does, close the app fully from the app switcher and reopen it once as a fallback.

I paid but the app still shows a lower plan

Tap **Restore Purchases** in Settings > Subscription while signed in with the Apple ID that made the purchase.

I switched from Pro XL to Pro and still see Pro XL

That is expected. Apple applies the change at your next billing date; you keep what you paid for until then.

Import rejected my file

Confirm the file ends in .csv, the header row is unchanged, and every required field has a value. Re-download the template if in doubt.

Notifications never arrive

Allow notifications for PeptideCRM in the iOS Settings app, then re-enable the toggles under Settings > Notifications.

Face ID will not turn on

Confirm Face ID or Touch ID is enrolled on the device, then toggle Biometric Lock again.

Stock numbers look wrong

Check the client cards for a duplicate assignment and remove it. Assignments and reorders are what move stock.

New phone or iPad

Back up on the old device, install PeptideCRM on the new one, sign in, restore the backup file, then tap Restore Purchases.

SECTION 16

Support and legal

Getting help

Email support@peptidcrm.app and mention what you were doing when the problem appeared, plus your device model and iOS version. Never send us your backup password.

Documents

- Privacy Policy — peptidcrm.app/privacy.html
- Terms of Service — peptidcrm.app/terms.html
- Support — peptidcrm.app/support.html
- Data deletion — peptidcrm.app/data-deletion.html

Important notice

PeptideCRM is business record-keeping software for research use only. It does not provide medical, clinical, or pharmaceutical advice, does not recommend or validate any amount or protocol, and is not a substitute for a qualified professional. You are responsible for how you use the records you keep in it and for complying with the laws that apply to you.

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