iClassPro

Getting Started with Camps



This **Getting Started Guide** will walk you step-by-step through creating your very first camp in iClassPro.

Once you've completed the steps below, you will have learned how to create a new camp, create an enrollment, and enable the feature for the Customer Portal so your customers can create and manage their own camp enrollments online!

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Determine the Best Event Type

First, consider whether the event you are setting up would be best configured as a Class, Camp, or Appointment. You can use the chart below to help you determine which event type should be used based on several factors, including:

- Your **INTENDED AUDIENCE** for the event
- The **EVENT DURATION**
- How **TUITION/FEES** should be charged
- The **SCHEDULE** of when/how often the event will take place
- Whether the event is compatible with **PUNCH PASSES**
- Any additional **UNIQUE FEATURES** that apply to the specific event type.

	CLASS	CAMP	APPOINTMENT
INTENDED AUDIENCE	Group	Group	Private or Semi-Private
EVENT DURATION	Weekly or Multiple Times Per Week	One-Time or Short duration	One-Time or Recurring
TUITION/FEES	Charged Monthly or Per-Session	Charged Once (usually up-front)	Charged for each timeslot booked
SCHEDULE	Recurring (Fixed)	One-Time (Fixed)	One-Time or Recurring (Fixed)
PUNCH PASS COMPATIBILE	Yes	No	Yes
UNIQUE FEATURES	Supports Makeup & Trial Enrollments	Questions with Upcharge Options	Cancellation & Reschedule Options

Configuring Prerequisite Settings

During the Camp setup process, you will need to assign certain field values, such as:

- Tax Rate (if applicable)
- Zone (if applicable)
- Program

Before you begin, take a few minutes to look over the following Knowledge Base documents to ensure that you have everything set up that will be needed.

SETTINGS > SETUP > GENERAL SETTINGS

- Creating and Configuring Tax Rates
- © Creating and Configuring Zones
- **E** Creating and Configuring Programs



During the camp creation process, you will also need to assign a Camp Type and Camp Pricing Schedule. Instructions for configuring each of these settings will be covered in Steps 3 and 4.

How to Create a Camp Type

Camp Types group similar camps together to make them easier to locate in the Customer Portal. All camps must be assigned to a Camp Type.

The Customer Portal will display the Camp Type image whenever a camp assigned to that type is within its Allowed Registration Dates.

By default, accounts include a Camp Type titled "Camp". You can create additional Camp Types using the instructions below.

To create or edit Camp Types:

- 1. Navigate to **SETTINGS > SETUP > CAMP SETTINGS.**
- 2. Either click "Add Camp Type" or click the pencil/edit icon to the left of an existing camp type to edit.
- 3. Enter a name for your Camp Type, providing both the singular and plural titles.
 - A. If there is only one active camp using the defined Camp Type, the Customer Portal will display the singular title. If multiple camps are active using the defined Camp Type, the Customer Portal will display the plural title instead.

- 4. If desired, assign an image to the Camp Type. This image will be shown in the Customer Portal to access a list of camps using that particular type.
 - A. NOTE: The recommended image size for Camp Types is 400px x 200px.
- 5. Be sure to SAVE your changes.



For more information about creating Camp Types, click here!

How to Create a Camp Pricing Schedule

Pricing schedules are how iClassPro's Camp feature determines how much to charge for camp enrollments including multi-block and multi-sibling discounts and special discounts. At least one pricing schedule must be created before a camp can be created and saved.

A camp block is a specific time and date that a camp meets. Camps can be set up to charge a flat price for the entire duration of the camp, or priced per block (with or without built-in discounts). If multiple camps charge the same amounts, you can use the same Pricing Schedule for all of them.

If you already have a Pricing Schedule you would like to use for this camp, you can skip this step.

To create or edit a Camp Pricing Schedule:

 Navigate to SETTINGS > SETUP > CAMP SETTINGS > PRICING SCHEDULES

2. Either click "Add New Pricing Schedule" or click the pencil/edit icon to the left of an existing camp type to edit.

- 3. Enter a name for your Pricing Schedule.
- 4. Choose how to count students/attendees.
 - A. **One at a time**: Each sibling in a family enrolled in the same camp is assigned a specific column of pricing in the Pricing Schedule.
 - B. **Total**: All of the siblings in a family enrolled in the same camp will use the pricing column that matches the total number of siblings. (i.e., Two siblings will be charged the prices in column two, three siblings will be charged the prices in column three, etc.)
- 5. If you are charging a deposit amount upon sign-up and collecting the remainder of the price later, enter the deposit amount for each student in the "Student / Attendee Deposit" section.
 - A. This can be entered as a dollar amount or percentage of tuition. (If you are using a percentage-based deposit amount, the amount will be based on the camp tuition cost and will not include any additional costs based on user-defined questions.)
- 6. Enter the full pricing for each combination of blocks in the "Students/Attendees" table. Be sure to include Deposit amounts in the total.
 - A. For example, if the camp is \$100 and the deposit is \$25, you will still enter \$100 (instead of \$75).

- 7. Special Discounts or Early Bird discounts should be entered in the "Special Discounts" tab.
- 8. Be sure to SAVE your changes.



For more information about creating Pricing Schedules, **click here!**

How to Create a Camp

- 1. Navigate to the CAMPS page.
- 2. Click the NEW CAMP button from the left-hand navigation menu to launch the "Create Camp" window
- 3. Fill out the required fields on each of the following tabs.

Details Tab

- 1. **Enter the details** for the camp you are creating. Note that all fields are required unless marked otherwise.
 - A. Camp Name
 - B. Status
 - I. NOTE: All new camps are marked as "Active" by default.
 - C. Camp Program
 - D. (optional) Camp Zone
 - I. NOTE: If you are assigning the Camp to a specified Zone that would result in overbooking the Zone, the system will display a warning.
 - E. Camp Type
 - F. Camp Requirements
 - G. Minimum/Maximum Age
 - I. Note that age requirements must be entered as numbers. Age can be

handled in two different ways: as whole numbers or as decimals. Using a decimal will enforce partial years.

- a. For example, a whole number "maximum" age of 12 will allow any student between 12.0-12.9999 to register, whereas a decimal "maximum" age of 12.1667 will not allow any student older than 12 years, 2 months to register. (Therefore a student who is 12 years, 3 months would not qualify since they would be 12.25 years old).
- H. Maximum Number of Entries
- I. Gender
- J. (optional) Grade
- K. Payment Settings
 - I. Camp Pricing Schedule assigns which Camp Pricing Schedule to use when creating a tuition charge for the camp.
 - II. Amount Due at Signup determines how much the customer is required to pay upon a successful auto-approved registration.
 - Deposit Due Only creates a charge for the full tuition amount,
 but only requires payment for the deposit amount specified in the
 Camp Pricing Schedule (upon successful enrollment).
 - b. Force Pay in Full creates a charge for the full tuition amount and requires payment in full (upon successful enrollment).
 - i. NOTE: If you allow customers to modify an existing camp enrollment, the system will determine whether it should charge for

auto-approved camp enrollment modifications based on whether "Force Pay in Full" is enabled as the "Amount Due at Signup."

- If this option is selected, the system will charge for auto-approved camp enrollment modifications (upon successful auto-approval).
- 2) If this option is NOT selected, the system will NOT charge for auto-approved camp enrollment modifications (upon successful auto-approval).
- c. No payment required creates a charge for the full tuition amount but does not require any payment (upon successful enrollment).
- III. (optional) Camp Tax Rate Displays any tax rate information inherited from the Camp Program and allows you to override if desired.
- L. Camp Dates defines the start and end dates of the camp.
- M. Allowed Registration Dates defines the dates during which the camp appears on the Customer Portal for customers to register (if allowed).

 These dates also determine when customers who are already enrolled in a camp will be allowed to modify their enrollment (if allowed).

Customer Portal Tab

The "Customer Portal" tab contains several settings related to how the system handles the display and interaction with the camp on the Customer Portal.

- Show On Web if enabled, the camp will be displayed on the Customer
 Portal within the specified "Allowed Registration Dates."
- Allow Web Registration determines whether customers are allowed to create enrollments in the camp from the Customer Portal.
 - NOTE: If the "Show On Web" option is enabled and "Allow Web Registration"
 is left disabled, customers will be prompted to contact you to enroll.
- Allow Parents to Choose Days determines whether parents can choose specific camp dates when registering. If left disabled, the student will be enrolled for the full duration of the camp
 - NOTE: If this option is enabled, be sure that your camp pricing schedule is configured to account for per-block pricing.
- Auto Approve Requests determines whether enrollments will be automatically approved provided the student meets all age/gender criteria and the camp is not full.
 - NOTE: This option must be enabled for the system to create a tuition charge for the student.
- Display Schedule Alias in Place of Schedule Details if you are using the Camp Alias feature, enabling this option will show the Alias name when displaying the camp schedule (instead of specific timeslot details).
- Camp Picture if a picture is uploaded, it will be displayed under the camp
 details in the Customer Portal. (NOTE: The camp details must be saved
 before this option is available.)

- The recommended image size for the camp picture is 400px x 200px.
- Description if a description is entered, it will be displayed under the camp details in the Customer Portal.

User Defined Tab

The "User Defined" tab allows you to enter questions for customers to answer upon registration in order to collect information or charge additional fees.

Questions can be optional or can be configured to require an answer by enabling either "Require a Yes or No Response" or "Require a Typed Response."

To charge an additional fee based on the customer's response:

- Both "Require a Yes or No Response" and "Use Price (will auto create a charge)" must be enabled.
- An amount must be entered in the "Price" field.

If the customer answers "Yes" to the question, the amount designated in the "Price" field will be applied once per enrolled student. If the customer answers "No", then no additional fee will be assessed for the student.

Schedule Tab

The SCHEDULE tab defines which days/times the camp will occur. Each date and time entered on the schedule is considered a "block" in the pricing schedule. Be sure to select a day, time, and duration and click "Add Time Slot." (NOTE: When adding the duration, be sure to enter a "0" in the hour field if the duration is less than 60 minutes.)

If you enabled the option to display the camp alias on the "Customer Portal" tab, a field will also be displayed to enter the alias when creating the block.

Schedules can be set up for a single date and time, varied dates and times, or weekly camp schedules.

- Weekly Schedule: Allows you to select weekdays for a recurring schedule over the dates of your camp.
- **Specific Dates**: Allows you to choose specific dates within the camp dates to add to the schedule.

A "Max Students" option will be displayed for each camp block if "Allow Parents to Choose Days" is enabled on the "Customer Portal" tab. This will allow you to override the maximum number of enrollments on a block-by-block basis, with the following restrictions:

- This option will not appear if "Allow Parents to Choose Days" is disabled.
- This option will not appear if Camp Aliases are used.

Other Tabs

Other optional information that can be configured includes:

- Instructors
- Keywords
- Promo Codes
- Skill Tree
- Auto-Approval

NOTE: some of these tabs cannot be edited until the class has been saved.



For in-depth information about creating/editing Camps, click here!

How to Duplicate a Camp

You can use the "Create a Duplicate" feature to copy the majority of your camp settings from an existing camp to create a new one. For camps where the only information changing from week to week might be the name, the schedule, or other minor details (such as age or gender requirements), this feature can save you lots of time and effort.

To duplicate a camp:

- 1. **CREATE** and **SAVE** your first camp.
- Use the **pencil/edit** icon to the left of the existing camp to open the camp details.
- 3. Click the **Create a Duplicate** button at the bottom of the window.
- 4. In the duplicate camp window (labeled "Camp Details :: New Camp), **edit the details** to match the information for the new camp you want to create.
- **5. SAVE** the duplicate camp with the new details.



How to Enable and Configure Camps for the Customer Portal

Allowing Camps to Show in the Customer Portal

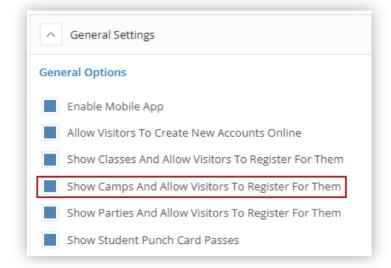
Each Camp allows you to define the following visibility options for the Customer Portal. These options can be configured on the camp's "Customer Portal" tab:

- Show to Customers if enabled, the Camp will be displayed on the Customer Portal.
- Allow Web Registration if enabled, customers will be able to register for the Camp in the Customer Portal.

Enabling Camps for the Customer Portal

To enable camps for the Customer Portal,
navigate to **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > GENERAL SETTINGS** and enable the
option to "Show Camps And Allow

Visitors To Register For Them."





Configuring Camp Registration Settings

The "Camp Registration" section focuses on camp-specific registration settings.

Changes in this area will impact all of the camps which are shown online and allow registration. Some options will not appear unless certain other options are selected, as the options are linked.



For in-depth information about these settings, click here!

Email Templates

The system will use the following automated email templates to notify customers of actions related to Camp and Camp Enrollments:

SETTINGS > SETUP > GENERAL SETTINGS > EMAIL TEMPLATES > "iClassPro"

Emails that are automatically sent for camp enrollment-related actions that are performed in the Office Portal.

- Camp Cancelled An email that can be sent to families when a camp date is cancelled.
- Camp Enrollment Request Approved Sent when a staff member approves a camp enrollment request from Online Activity. Includes camp details.
- Camp Enrollment Request Denied Sent when a staff member denies a camp enrollment request from Online Activity. Includes camp details.
- New Camp Enrollments Sent when a staff member creates a camp enrollment in the Office Portal. Includes enrollment details.

SETTINGS > SETUP > GENERAL SETTINGS > EMAIL TEMPLATES > "Customer Portal"

Emails that are automatically sent for camp enrollment-related actions that are performed in the Customer Portal.

- Camp Enrollment (Approved) An email sent to customers for each camp
 enrollment processed through the mobile app or Customer Portal that was
 automatically approved. Includes the enrollment details and a transaction
 summary from checkout.
- Camp Enrollment (Request) An email sent to customers for each camp
 enrollment processed through the mobile app or Customer Portal that was
 submitted as a request. Includes the enrollment details.
- Notification of Camp Enrollment An optional email sent to the location email address for new camp enrollments in that location made via the mobile app or customer portal.
 - NOTE: "Send email notification upon auto-enrollment to email address of camp location" must be enabled under SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > CAMP REGISTRATION for the system to trigger this email.

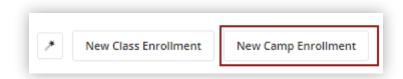


How to Create/Modify a Camp Enrollment

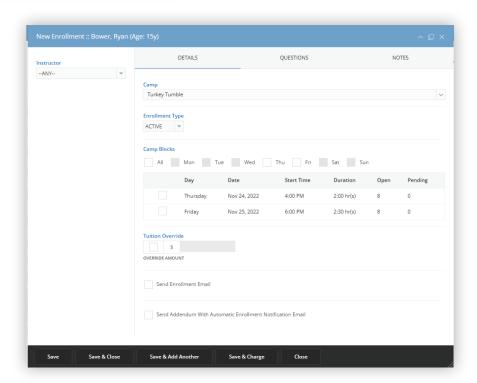
Creating a Booking In the Office Portal

New camp enrollments can be created from either the FAMILIES or STUDENTS page.

1. From either page, click on the "Enrollments" icon, then click on **New Camp Enrollment.**



Start typing a camp name into the
 "Camp" field and/or use the drop down menu to select a camp.



- 3. Choose an **Enrollment Type** (Active/Wait list).
- 4. **Select the block(s)** for which the student is registering. You can use a day of the week check box to choose all Mondays, Tuesdays, etc during the camp dates, use the All box to select all available blocks in the camp, or choose individual blocks from the list. Keep an eye on the number of openings for each camp block to avoid overbooking the camp.
 - A. NOTE: the blocks available to be selected may be affected by the setting to "Restrict enrollment start date based on camp start time" under **SETTINGS** > **CUSTOMER PORTAL** > **OTHER SETTINGS** > **CAMP REGISTRATION**.
- 5. If needed, use the **Override Tuition** checkbox and price field to set a custom tuition for this student's entire camp enrollment.
- 6. Choose whether or not to **send an enrollment email** to the primary email address for the family to confirm the enrollment.
- 7. If you are utilizing **User Defined Questions** on this camp, click the Questions tab at the top of the screen and answer the required questions.
- 8. **Save the enrollment** using one of the following options:
 - A. Click **SAVE** to simply save the enrollment and return to the FAMILIES or STUDENTS page.
 - B. Click **SAVE & ADD ANOTHER** to save the enrollment and reopen the "New Camp Enrollment" window to create a second enrollment for this student.



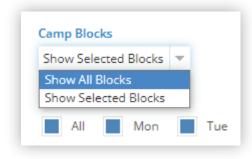
C. Click **SAVE & CHARGE** to save the enrollment and open the NEW CHARGE window.

Modifying a Booking In the Office Portal

If a student has an existing camp enrollment and wishes to enroll for additional camp blocks, you will need to modify the existing enrollment instead of creating a new one.

To modify an existing camp enrollment:

- 1. From the FAMILIES, STUDENTS, or CAMP page, expand the Enrollments view.
- 2. Click on the **pencil/edit icon** next to the camp enrollment you wish to modify.
- 3. Under the "Camp Blocks" drop-down menu, select the option to **Show All Blocks**:



- 4. **Select any additional camp blocks** for which the student should be enrolled.
- 5. **Be sure to SAVE** any changes using one of the following options.
 - A. Click **SAVE** to simply save the enrollment changes and keep the edit window open.
 - B. Click **SAVE & CLOSE** save the enrollment and return to the FAMILIES, STUDENTS, or CAMPS page.
 - C. Click **SAVE & CHARGE** to save the enrollment and open the NEW CHARGE window to charge the family for the additional camp blocks.
- 6. Click **Close** to close the edit window without making any changes, or click **Delete** to completely delete the camp enrollment.



For more information about creating/modifying camp enrollments from the Office Portal, click here!

Creating a Booking In the Customer Portal

- 1. From the Customer Portal Dashboard, click the BOOKING button to bring up a wizard asking which type of Booking/Enrollment you wish to create:
- 2. There will be a separate icon displayed for each Camp Type. Click on the appropriate Camp Type to bring up a list of available camps.
- 3. Select the camp in which you wish to enroll.
- 4. The system will display the CAMP DETAILS.
- 5. Click SELECT STUDENTS to begin the enrollment process.
 - A. NOTE: if you are not yet logged in, you will be prompted to do so.
- 6. After logging in, select the student/students to enroll and click CONTINUE.
 - A. If the student profile does not yet exist, click "Add New Student" to create a new student profile.
- 7. Click ENROLL NOW! to continue the enrollment process.
- 8. Answer any User Defined Questions. If the camp allows parents to choose Days/Camp Blocks, select the blocks for which you wish to enroll.
 - A. NOTE: the blocks available to be selected may be affected by the setting to "Restrict enrollment start date based on camp start time" under **SETTINGS** > **CUSTOMER PORTAL** > **OTHER SETTINGS** > **CAMP REGISTRATION**.
- 9. Click ADD TO CART.
- 10. On the Checkout screen, you can either click ADD MORE ENROLLMENTS to create additional enrollments or click PAY NOW to complete the enrollment(s) and make payment.

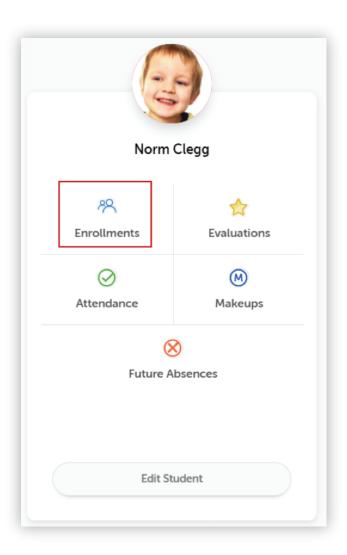
Modifying a Booking In the Customer Portal

If the option to "Allow Visitors to Modify Camp Schedule" is enabled under **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > CAMP REGISTRATION,** customers will be able to modify existing camp enrollments to select additional camp blocks if the following criteria are true:

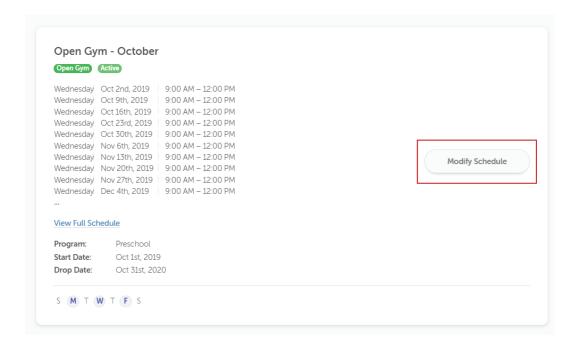
- The option to "Allow Parents to Choose Days" is enabled on the camp's CUSTOMER PORTAL tab.
- The current date is within the camp's "Allowed Registration Dates."

To modify an existing camp enrollment:

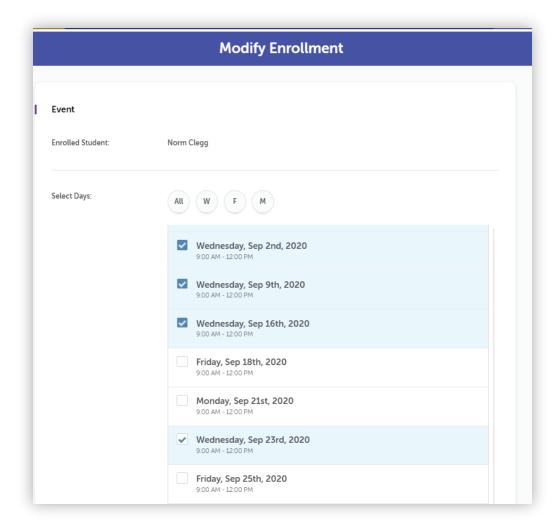
- After logging into the Customer Portal, navigate to the MY ACCOUNTS area.
- Click the ENROLLMENTS icon for the student for whom you wish to modify a camp enrollment.



Click the MODIFY SCHEDULE link next to the camp enrollment you wish to modify.



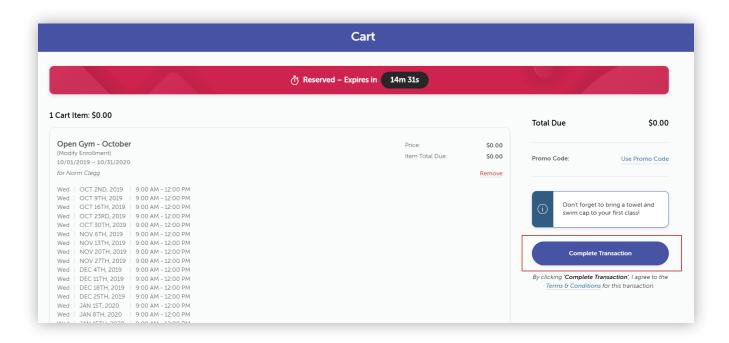
4. Make any adjustments to the existing camp enrollment. Blocks that have already been selected will be checked and highlighted in blue. Check the box next to any blocks you wish to add.



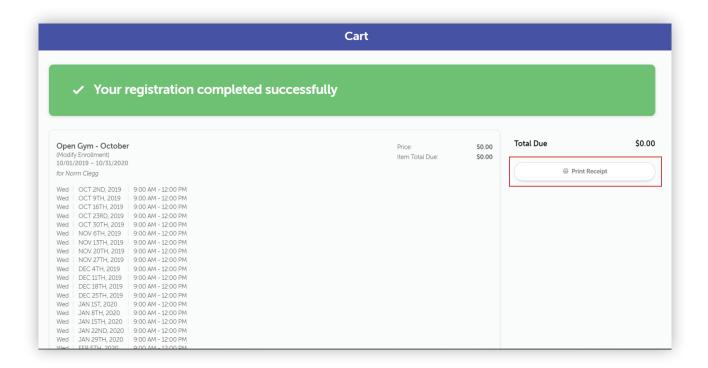
- A. NOTE: the blocks available to be selected may be affected by the setting to "Restrict enrollment start date based on camp start time" under **SETTINGS** > **CUSTOMER PORTAL** > **OTHER SETTINGS** > **CAMP REGISTRATION**.
- 5. After selecting any additional blocks, click ADD TO CART to load the Shopping Cart.



- A. Depending on the camp pricing schedule and how you have configured your Customer Portal to handle modified enrollments, the customer may or may not be required to make a payment for the additional blocks.
- Regardless of the total amount due, the customer will need to click the COM-PLETE TRANSACTION button to submit the enrollment modifications and/or make a payment.



7. If the transaction is successful, the customer will see a confirmation



8. From this screen, they can either PRINT A RECEIPT or click VIEW MY ACCOUNT at the bottom of the screen to return to the MY ACCOUNT screen.



For more information about creating/modifying camp enrollments from the Customer Portal, click here!

Congratulations!

You have successfully learned how to create a new camp, create and/or modify an enrollment, and enable camps to show in the Customer Portal so your customers can create and manage their own camp enrollments online! Feel free to refer to this guide any time you need to create new camps or enrollments.



