iClassPro

Getting Started

with Classes

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

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

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STEP 1

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

STEP 2

Configuring Prerequisite Settings

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

- Class Program
- Class Level (if applicable)
- Zone (if applicable)
- Tax Rate (if applicable)
- Billing Schedule/Tuition Pair
- Session/Rolling Session (if applicable)

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
- Creating and Configuring Programs

SETTINGS > SETUP > CLASS SETTINGS

- Creating and Configuring Sessions/Rolling Sessions
- Creating and Configuring Class Levels
- Creating and Configuring Tuitions/Tuition Schedules
- Creating and Configuring Billing Schedules

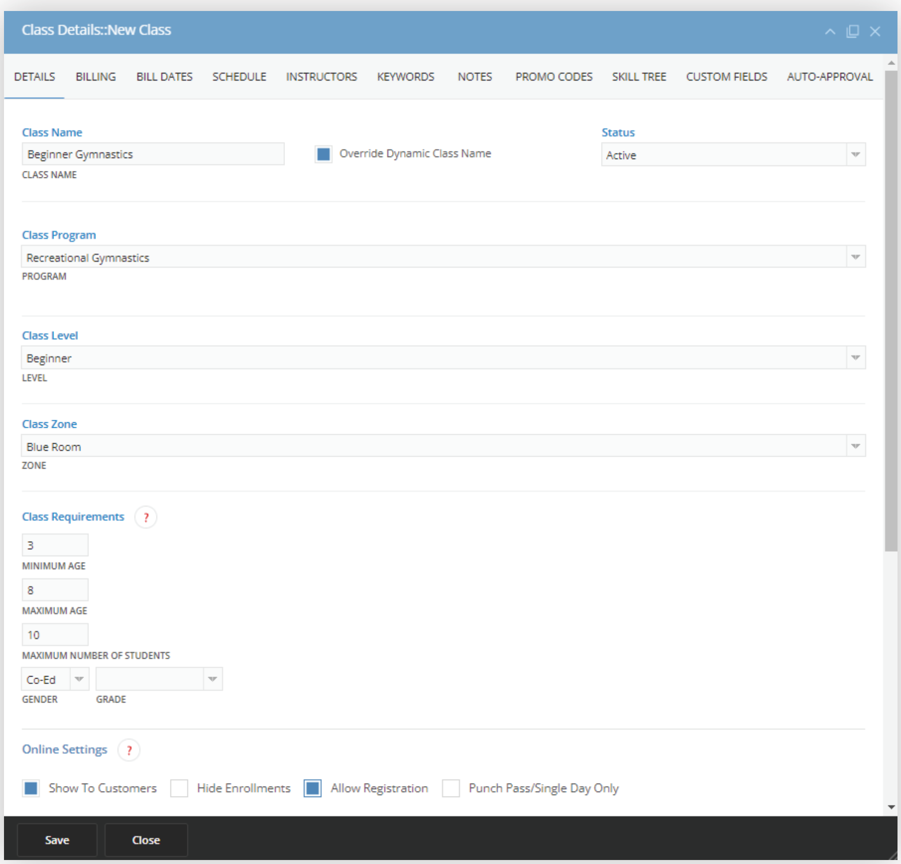
STEP 3

How to Create a Class

1. Navigate to the CLASSES page.
2. Click the NEW CLASS button from the left-hand navigation menu to open the CREATE CLASS window.
3. Fill out the required fields on each of the following tabs.

Details Tab

1. Enter the details for the class you are creating. Required fields on the Details tab include a Class Name (either manually entered or built dynamically), a Program for tracking income, min/max ages for students, a maximum number of allowed enrollments, and gender requirements.



   a. *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.*
      i. *For example, a **whole number** "max" age of 12 will allow any student between 12.0-12.9999 to register. Entering a **decimal** "max" 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).*

2. The Online Settings options allow you to "Show to Customers", "Hide Enrollments", "Allow Registration", or "Punch Pass/Single Day Only," and to enter a class description for customers *(available from the Customer Portal class list)*. The recommended size for images included in the class description is 400px x 200px.
   A. The “Show To Customers” option determines whether or not the class is visible to customers on the Customer Portal.
   B. The “Hide Enrollments” option determines whether or not enrollment status in the class is displayed to the customer while the setting is enabled. *(The most common use for the setting would be to hide the enroll-ments when assigning students to specific team classes, so you can sort/enroll all students in the class(es) before making them public.)*

   i. *IMPORTANT NOTE: enabling the "Hide Enrollments" option will also hide these classes from results when redeeming makeup tokens in the Customer Portal.*

C. The "Allow Registration" option determines whether or not customers are allowed to create enrollments in the class from the Customer Portal. If the "Show to Customers" option is enabled and "Allow Registration" is left disabled, customers will be prompted to contact you to enroll.

   i. The "Punch Pass/Single Day Only" option designates that enrollment in the class is limited to Punch Pass enrollments only.

      1) If this option is enabled, the class will ONLY appear for customers in Punch Pass redemption workflows in the Customer Portal and Check-In Kiosk. However, the class will show in ALL enrollment workflows in Office Portal. (Except in the cases of Punch Pass redemption, enrollment type restrictions will not apply to staff members creating enrollments within the Office Portal.)

STEP 3
continued

Billing Tab

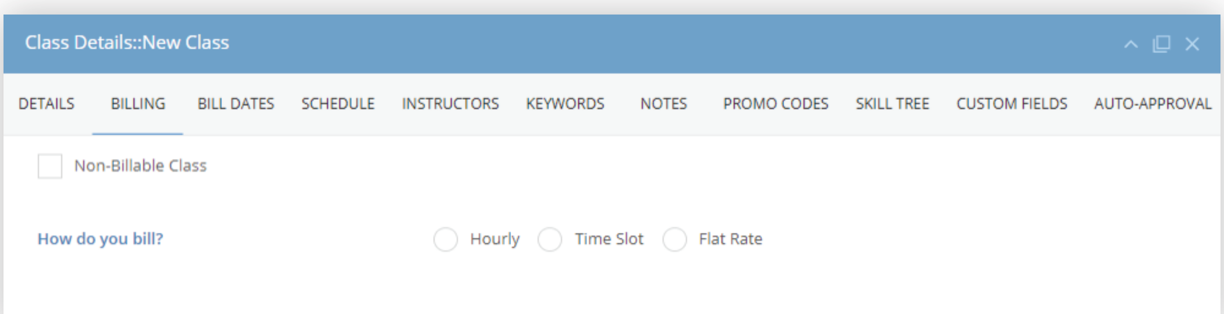
The “Billing” tab configures the class billing structure, including:

- Calculating tuition cost (Hourly/Time Slot/Flat Rate)
- Discounts
- Proration
- Tax settings
- Billing Schedule/Tuition

If the "Non-Billable Class" option is **enabled**, you will be prompted to indicate whether enrollments in the class should be counted towards multi-student/-multi-class discounts.

If the class is billable, leave the "Non-Billable Class" option disabled.

If the "Non-Billable Class" option is **disabled**, or if you will allow enrollments in the class to count towards discounts, you will use the Billing Wizard to set up the billing structure for your class.



The Billing Wizard walks you through setting up your class billing structure by answering questions about how you bill, how you want to handle discounts/proration, and other common billing questions. The Wizard will walk you through a number of options based on your response to the question "How Do You Bill?"

There are three billing options:

- Hourly
- Time Slot
- Flat Rate

Each class can have one or more Billing Schedule/Tuition pairs attached to it to allow for multiple billing options.

For more information about configuring multiple billing options, **click here!**

Bill Dates Tab

The Bill Dates tab will allow you to indicate the length of time billing is assessed over and control re-enrollment.

Classes must use one of the following bill date options:

- This Class Bills Monthly
- This Class Bills According to Custom Date Ranges (Sessions or Rolling Sessions)
  - Keep students enrolled after session ends (Rolling Sessions)
  - Drop students after session ends (Sessions)

For more information about Session/Rolling Sessions, **click here!**

Schedule Tab

The SCHEDULE tab is used to specify the days and times that the class will meet. If a class schedule has multiple days/times associated with it, the system assumes that students enrolled in the class are enrolled for all days on the schedule for billing and attendance purposes.

If you have a class where you allow students to choose which days they will attend, each class day should be set up as its own class.

Other Tabs

The previous sections walked you through entering the minimum amount of information required to create a new class. However, other optional information can be configured:

- Instructors *(while not technically required, it is recommended that all classes are associated with at least one instructor.)*
- Keywords
- Notes
- Promo Codes *(inherited from the Class Program but can be overridden here)*
- Skill Tree *(inherited from the Class Program but can be overridden here)*
- Custom Fields
- Auto-Approval *(defines additional prerequisites for auto-approving enrollments in the class)*

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

For more information about creating/editing Classes, **click here!**

STEP 4

How to Duplicate a Class

iClassPro offers two methods for duplicating classes. Each method handles the class "Bill Dates" structure differently, so it is important to note how each method handles this and why.

Manually Duplicating a Class

When using the "Create a duplicate" option at the bottom of the "Edit class" window, you are creating one new class at a time. This allows you to review all of the class details in the new class window and make any desired changes as you go. In this scenario, iClassPro tries to preserve as much data as possible, while also allowing you to edit the structure of the "Bill Dates" tab on the new class. Keeping any previous Session/Rolling Session settings intact prevents you from having to set the class back to "This class bills according to custom date ranges" and attach sessions each time you make a copy.

Using the Mass Copy Tool

When using the "Mass Copy" tool, iClassPro creates all of the duplicate classes as "Monthly" classes instead, as you might have selected a mixture of Monthly and Session/Rolling Session-based classes. This allows you to then use the mass

"Assign Sessions" tool to change the class billing setup if you wish (for example, from Session to Rolling Session, or Monthly to Session/Rolling Session).

For more information about duplicating Classes, **click here!**

STEP 5

How to Enable and Configure Classes for the Customer Portal

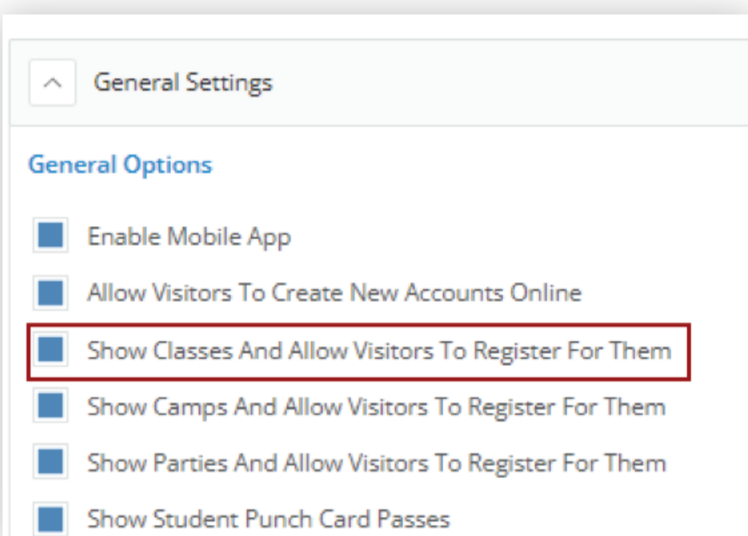
Allowing Classes to Show in the Customer Portal

Each Class allows you to define the following "Online Settings" options for the Customer Portal:

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

Enabling Classes for the Customer Portal

To enable classes for the Customer Portal, navigate to **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > GENERAL SETTINGS** and enable the option to "Show Classes And Allow Visitors To Register For Them."



Configuring Class Registration and Class Filter Settings

The “Class Registration” section focuses on class-specific registration settings. Changes in this area will impact all of the classes which are shown online and allow registration. Some options will not appear unless certain other options are selected, as the options are linked.

The “Class Filters” section of the Customer Portal settings will allow you to edit which search filters are made available for the class list under Classes in the Customer Portal.

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

STEP 6

Email Templates

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

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

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

- **Class Cancelled** - An email that can be sent to families upon class cancellation.
- **Class Drop Enrollment** - Sent when a staff member drops a class enrollment. Includes enrollment details.
- **Class Drop Enrollment Approved** - Sent when a staff member approves a request to drop a class enrollment from Online Activity. Includes enrollment details and drop date.
- **Class Drop Enrollment Denied** - Sent when a staff member denies a request to drop a class enrollment from Online Activity. Includes enrollment details.
- **Class Drops for Account Balance** - Sent when a class is dropped due to failed payment. Includes enrollment details.
- **Class Enrollment Request Approved** - Sent when a staff member approves a new class enrollment request from Online Activity. Includes enrollment details.
- **Class Enrollment Request Denied** - Sent when a staff member denies a new class enrollment request from Online Activity. Includes enrollment details.

- **Class Opening Available** - Waitlisted Space Available
- **Class Transfer Enrollment Approved** - Sent when a staff member approves a class transfer request from Online Activity. Includes enrollment details.
- **Class Transfer Enrollment Denied** - Sent when a staff member denies a class transfer request from Online Activity. Includes request details.
- **Class Transfer Enrollment Processed** - Sent when a staff member manually transfers a class enrollment. Includes enrollment details.
- **New Class Enrollments** - Sent when a staff member creates a class enrollment. Includes enrollment details.
- **Waitlist Approved** - Waitlisted has been approved and converted to an enrollment

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

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

- **Class Enrollment (Approved)** - An email sent to customers for each class enrollment processed through the mobile app or Customer Portal that was automatically approved. Includes the enrollment details and a transaction summary from checkout.

- **Class Enrollment (Request)** - An email sent to customers for each class enrollment processed through the mobile app or Customer Portal that was submitted as a request. Includes the enrollment details.
- **Notification of Class Enrollment** - An optional email sent to the location email address for new class enrollments in that location made via the mobile app or customer portal.
  - *NOTE: "Send email notification upon auto-enrollment to email address of class location" must be enabled under* **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > CLASS REGISTRATION SETTINGS** *to trigger this email.*

For more information about customizing automated emails, **click here!**

STEP 7

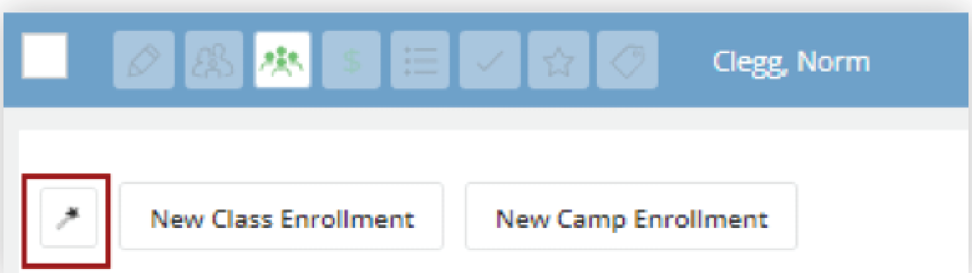
How to Create a Class Enrollment

Creating a Booking In the Office Portal

NOTE: new class enrollments can be created from several areas of the Office Portal. For this guide, we will focus on creating an enrollment from the FAMILIES or STUDENTS page using the New Enrollment Wizard.

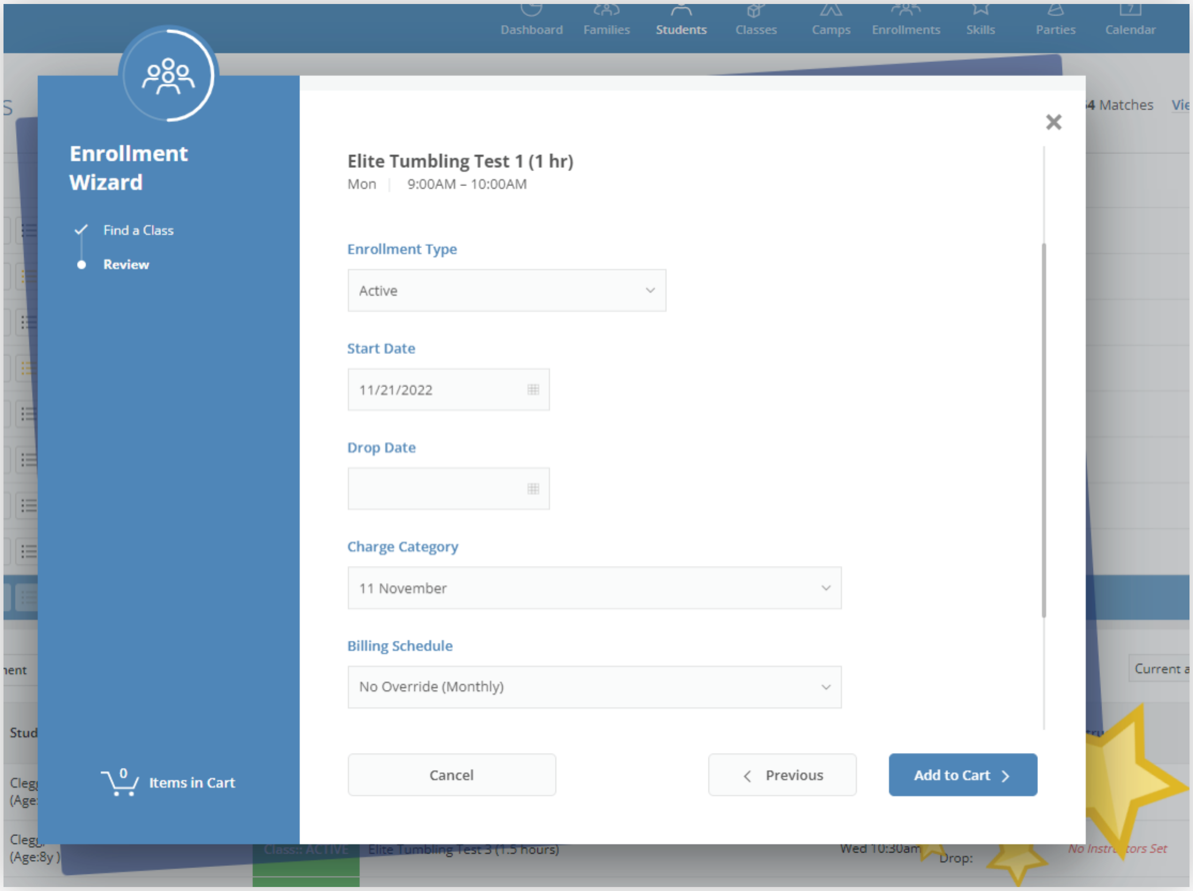
From the FAMILIES or STUDENTS page, expand the Enrollments view by clicking on the Enrollments icon. (Alternatively, you can also view enrollments from the Family Details page or by clicking on the “Enrollments” tab within the Student Detail view.)

1. Click the “Launch Enrollment Wizard” icon.



2. Answer the questions to create the enrollment.
   A. “Who Will Be Enrolling?” - Select the student you wish to enroll.
      I. From FAMILIES – select the appropriate student from the list of students in the family. Click NEXT to continue.
      II. From STUDENTS page or NEW STUDENT WIZARD – this step will be skipped as the student will be automatically selected.
   B. “Find Classes to enroll [Student First Name] in”
      I. Click “Show Filters” to display filters and/or search for a specific class.
      II. At the bottom of the "Filters" on the left-hand side of the window, there is an option for "Has Temporary Openings."
         a. If "Has Temporary Openings" is enabled, an "As Of Date" field will be shown to allow staff to choose a specific date that defines WHEN the temporary openings need to exist.
      III. Once the class is displayed on the list, click ENROLL to continue.
   C. If there are any enrollment warnings, they will be displayed in a popup window. From here, you can click YES to override the warnings and continue with the enrollment process or click NO THANKS to close the window without enrolling the student.

STEP 7
continued



D. “Enrollment Details for [Full Student Name]”

I. Choose an Enrollment Type (Active, Makeup, Trial, Single Day or Wait) and a session if the selected class has sessions attached.

II. If Makeup Tokens are enabled and you choose MAKEUP as the enrollment type, available Makeup Tokens will be displayed to apply to the enrollment. If no tokens are available, the staff member creating the enrollment must have permission to create a MAKEUP enrollment without tokens to continue the enrollment process.

III. Confirm the Start and Drop Date of the enrollment. The Drop Date can be left blank if there is no designated end date for the class.

a. If you used the "Has Temporary Openings" option with an "As of Date", the system will auto-populate the start date to match the "As of Date."

b. If you use Sessions or the class is set to bill Monthly with Start/End Date options, the start date and drop date will automatically populate based on the defined dates.

c. If you use Rolling Sessions or the class is set to bill Monthly with a defined Start Date (but no End Date), the start date will automatically populate based on the defined dates, but the drop date will be left blank.

d. If the class is set to bill Monthly with no Start/End Date options, the start date will automatically populate with the current date as the start date, but the drop date will be left blank.

e. If you choose MAKEUP/TRIAL/SINGLE-DAY as the Enrollment Type, the enrollment start/drop dates will automatically populate with the same date.

E. The Charge Category will automatically populate based on your settings under **SETTINGS > SETUP > CLASS SETTINGS > AUTO CHARGE SCHEDULER.** (If no valid charge category exists because the one defined has been deleted or expired, you will be required to select a valid charge category to complete the enrollment process. Please be sure to define a new charge category to the "Auto Charge Scheduler" after you have completed the current enrollment.)

F. If necessary, you can choose a Billing Schedule option other than the default option set up on the class. Toggling the Override Tuition option and entering an amount in the PRICE box will allow you to designate a special tuition amount that will be used.
   I. If Tuition Override is checked, an option to Enable Tuition Expiration Date will be displayed.
      a. Enabling this option will allow you to define a date when the tuition override will automatically expire.
   II. NOTE: If a Tuition Override value is defined, the system will calculate the amount to be billed based on the "Tuition Override Behavior" setting under **SETTINGS > SETUP > CLASS SETTINGS > GENERAL CLASS SETTINGS**.

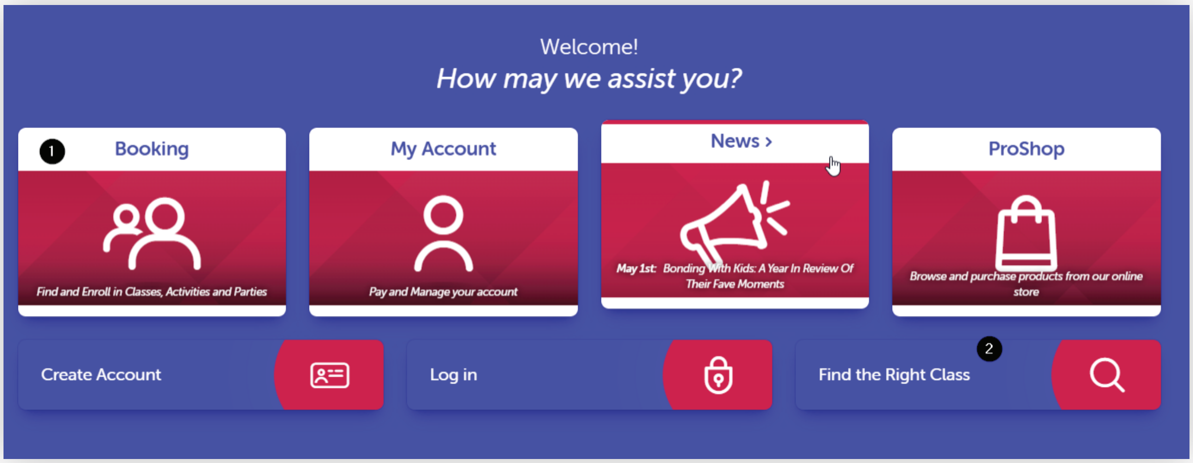
G. Choose whether or not to Send an Enrollment Email and/or Addendum to the primary email address for the family to confirm the enrollment. This option should be automatically enabled/disabled based on your settings under **SETTINGS > SETUP > FAMILY SETTINGS > ENROLLMENT EMAILS**.

3. Choose an option to continue:
    A. CANCEL – cancels the current enrollment and exits the Enrollment Wizard.
    B. PREVIOUS – returns to the previous screen so you can select a different class instead.
    C. ADD TO CART – adds the current enrollment to the cart and allows you to choose the next option:
        I. CHECKOUT – completes the checkout process.
        II. ENROLL ANOTHER – allows you to create another enrollment.
            a. If you launched the wizard from the FAMILY, you will be returned to the “Who Will Be Enrolling?” screen.
            b. If you launched the wizard from the STUDENT, you will be returned to the “Find Classes to enroll [Student First Name] in” screen.

For more information about creating a new class enrollment from the Office Portal, **click here!**

Creating a Booking In the Customer Portal

In the Customer Portal, it is possible to create a class enrollment in two different ways:



1. Using the BOOKING button - launches a wizard asking which type of Booking/Enrollment you wish to create.
2. Using the FIND THE RIGHT CLASS button - launches a wizard walking the family through selecting student age/gender which will bring up a preliminary list of classes for which they are qualified to enroll. Additional options from this page will allow the parent to filter the list further using the filters specified under **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > CLASS FILTERS**.

   A. Clicking "Find a Class" displays a prompt: "Need Help Finding the Right

Classes?"

I. Yes, Please – launches the FIND THE RIGHT CLASS wizard.

II. No, just looking – takes you to the CLASSES screen, where you can set your own filters or just browse the class list.

Once the CLASSES screen is displayed, the Class enrollment process is the same for both methods:

1. Click on a Class that shows openings to begin the registration process.
   A. NOTE: The class icons that are displayed can be customized per Class Level under **SETTINGS > SETUP > CLASS SETTINGS > LEVELS** or per Program under **SETTINGS > SETUP > GENERAL SETTINGS > PROGRAMS > BRANDING**. The system will display the Class Level image if one exists; if not, it will display the Program image instead.
2. Select the student/students to enroll. (There will be an option to “Add New Student” if the student to enroll does not exist in the system.)
   A. If you are not yet logged in, you will be prompted to do so. If you do not yet have an account, you will be prompted to create one.
   B. Upon login, customers will be prompted to read/agree to any Family Policies or any Student Policies that are configured to show on the Web (if they have not already done so). Once all required policies have been agreed to, customers will be taken back to the enrollment screen.

3. After logging in and selecting the student/students, click CONTINUE.
4. The system will display the CLASS DETAILS.
5. Click ENROLL NOW! to begin the enrollment process. (If your system allows customers to request a Trial or non-token related Makeup enrollment, this option will also be displayed.)
6. Enter any enrollment details and click ADD TO CART.
7. Once an enrollment is added to the Cart, it will be reserved based on the settings specified under **SETTINGS > CUSTOMER PORTAL > OPTIONS > Cart Reservation Timeout**.
8. 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.

For more information about booking from the Customer Portal, **click here!**

STEP 8

Congratulations!

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

Questions?

Please feel free to reach out to our helpful support team **here!**