



★ Basic Business Settings

Logging in to iClassPro

- ☐ Admin Username & Password Received via Email
- ☐ Bookmark Your Account URL
- ☐ Log in to the Office Portal ?
- ☐ Update or Assign a Staff Password ?

Business Information ?

- ☐ Verify Correct Business Name, Owner, & Person of Contact
- ☐ Business Web Address
- ☐ Country/State/Province
- ☐ Time Zone/Preferred Date Format/Currency Symbol

Locations ?

- ☐ Contact Information is Displayed on the Customer Portal
- ☐ Statement Logo ?
- ☐ Adding Multiple Locations ?

Transactions

- ☐ Configure Receipt Options/Business Identification ?
- ☐ Configure Accepted Card Types (*if applicable*) ?
- ☐ Configure Payment Types (*if applicable*) ?



★ Setup

General Settings ?

- ☐ Programs ?
- ☐ Charge Categories ?
- ☐ Anniversary Charges ?
- ☐ Tax Rates (optional) ?
- ☐ Zones/Areas/Lanes (optional) ?
- ☐ Email Templates (automated & custom) ?
- ☐ SMS & Voice Broadcast (optional) ?
- ☐ Blackout Schedules (if applicable) ?

Class Settings ?

- ☐ Tuitions ?
- ☐ Billing Schedules ?
- ☐ Sessions (if applicable) ? or Rolling Sessions (if applicable) ?
- ☐ Levels (optional) ?
- ☐ Discount Schedules (if applicable) ?
- ☐ Makeup Tokens (if applicable) ?
- ☐ Set Charge Category for Auto-Charge (if applicable) ?

✓ **Now you're ready to create new classes on the Classes Page!**

Camp Settings: Events Set-Up ?

- ☐ Camp Types ?
- ☐ Camp Pricing ?

✓ **Now you're ready to create new camps on the Camps Page!**



Creating Family/Student Accounts

- ☐ Import Data (if applicable) ?
- ☐ Manually Create New Family Accounts via the Office Portal ?
- ☐ Allow Parents to Create New Accounts via the Customer Portal
- ☐ Custom Family & Student Fields (if applicable) ?

Creating a New Staff Member ?

- ☐ Create User Group Permissions ?
- ☐ Create Staff Roles ?
- ☐ Time Clock Setup (if applicable) ?
- ☐ Configuring the Customer Portal Staff Page ?

Point of Sale

- ☐ What is Point of Sale? ?
- ☐ Making a Point of Sale Purchase via the Office Portal ?
- ☐ Making a Point of Sale Purchase via the Customer Portal ?

Punch Passes

- ☐ Punch Pass Basics ?
- ☐ Configuring Punch Pass Settings ?
- ☐ Creating Punch Passes ?
- ☐ How Punch Passes Work via the Customer Portal ?

Gift Certificates

- ☐ Configuring Gift Certificates ?
- ☐ Selling Gifts Certificates via the Office Portal ?
- ☐ Purchasing a Gift Certificate via the Customer Portal ?



★ Customer Portal

Settings ?

- ☐ Accessing the Customer Portal ?
- ☐ Short Video on Setting up Your Customer Portal ?
- ☐ News & Announcements Section (*optional*) ?
- ☐ Welcome Text
- ☐ Background, Splash, & Default Images ?
- ☐ Checkout Reservation Timer ?

General Settings ?

- ☐ Review Display Settings to Show Tuitions/Levels/Class Descriptions
- ☐ Review Skill Evaluation Access Options ?
- ☐ Review Student Attendance & Absence Requests ?
- ☐ Priority Registration (*if applicable*) ?

Marketing & Branding* (* Requires Premium Subscription)

- ☐ Kiosk & Mobile App Branding ?

Class Registration ?

- ☐ Understanding Registration Modes ?
- ☐ Set Anniversary Fee Charge Category (*if applicable*)
- ☐ Enable Mobile App ?

Class Filters ?

- ☐ Review Class Filter Options



Camp Registration ?

- ☐ Review Camp Registration Options
- ☐ Set Auto-Approve Charge Category

Financial ?

- ☐ Require Saved Payment Method Authorized for Recurring Billing
(enable if auto-pay is required)
- ☐ Review Ledger & Statement Options
- ☐ Review Options for Visitors to View and/or Use Account Credits
- ☐ Partial Payments & Promo Codes (if applicable)
- ☐ Handling Outstanding Charges

Lead Forms

- ☐ Configuring Taglines/Leads ?

★ Policies ?

Updating / Editing Family Policies

- ☐ Appointments (if applicable)
- ☐ Billing Authorization
- ☐ Rules, Terms, & Conditions
- ☐ Waivers

Updating / Editing Student Policies ?

- ☐ Photo Waivers (if applicable)
- ☐ Creating Student Policies

Updating / Editing Transaction Policies

- ☐ Functionality & Customer Interaction



★ Staff Portal

- ☐ General Settings Overview ?
- ☐ Enable Student Images ?
- ☐ Enable Check-In Mode ?

★ Check-in Kiosk ?

- ☐ Using QR Codes ?

★ Payment Services ?

- ☐ Complete Payment Services application to start processing payments by credit/debit card in 2 - 3 business days. Completion of this step will activate your iClassPro account. ?
- ☐ For accounts located outside the U.S., be sure to ask your account manager about supported payment partners in your territory.

★ iClassPro Extras ?

- ☐ Ask your account manager for more information about additional features available with Elite and Premium subscription plans.

★ Need help? iClassPro support is here for you! ?

- ☐ How to Get Assistance from iClassPro ?



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★ Want more training on iClassPro or a particular software feature?

- We want to ensure you are using iClassPro to the height of its potential. Whether you are new to any of our systems, have new personnel, or just need a refresher, our training sessions are an excellent way to maximize the successful implementation or ongoing use of our software. 