Life just got easier!™

Getting Started Guide

For additional help material, visit our website or contact us:

www.iclasspro.com/support 1-877-554-6776

Monday—Friday, 9am-6pm CST

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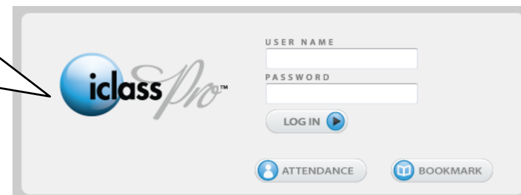
Step 1: Configure Your Settings

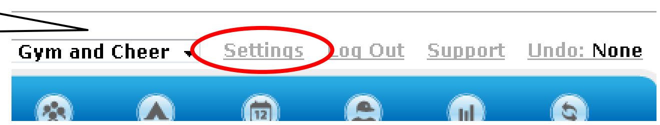
Items that are marked with this icon need configured before using your iClassPro account. This will save you time in creating your classes and getting iClassPro ready for billing.

Log in to your account by using the information provided in your email when your account was first created.

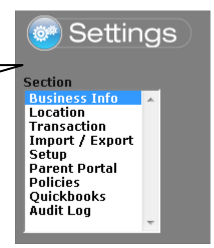


We suggest creating a bookmark to the iClassPro log in page for quick access.

Click on the word settings at the top right of the page.



There are many **customizable settings** in iClassPro. They are separated into sections on the left side of the page.



1. **Update your Business and Contact Information in the first section**
   a. The settings on this page also include your country, state, time zone, date format, and your currency. What you set up on this page will affect many parts of your iClassPro account.
   b. iClassPro will use this information for contacting you.

Make sure to click the Save button on all forms after making any changes

Anytime a change is saved successfully, you'll see a notification on the bottom of the screen.

2. The Location Section

iClassPro's location feature is used to manage more than one facility. If you need to create more locations, you can use the New Location button on the left side of the page.

iClassPro bills per location. So, creating or deleting locations on this page will affect your subscription fee. If you have any questions about the pricing, let us know.

The location information will be printed on your statements and other reports. *(Address, Phone Number, Website, etc.)*

Make sure to click the Save button after making any changes

3. The Transaction Section

This is where you set up your electronic payment and receipt printing settings. You can configure those when you are ready. See our separate guide called, "Setting iClassPro Up For Electronic Payments" for help with this topic.

4. The Import / Export Section

In this section, you can create and restore backup files of your database as well as import data from other software. Contact us or refer to our knowledge base for more information on importing data and iClassPro backup files.

5. The Setup Section

The set up section is the core of the application settings. The customizable features of iClassPro are separated by General, Class, Family, Student, and Staff.

A. General Settings

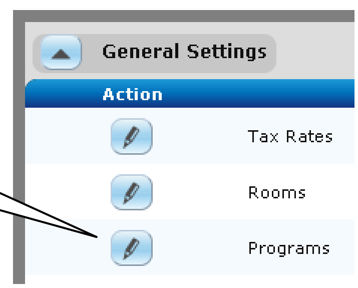
These settings have effects that are application wide. These are the settings you'll want to configure before using iClassPro.

Tax Rates—Create the tax rate to be used on taxable line items. You can specify a charge as taxable when creating it.

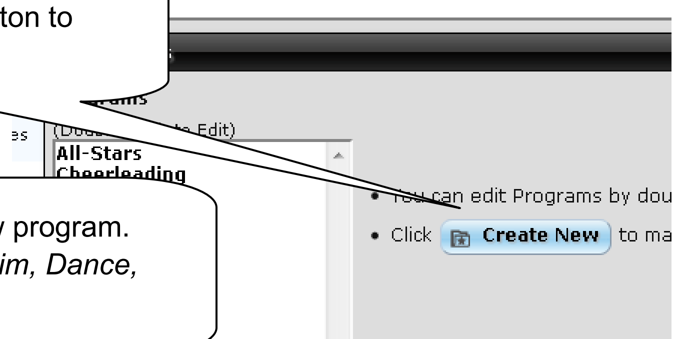
Rooms—It can be helpful to set up rooms if you want to use iClassPro to help you schedule where your classes meet inside your facility.

Programs—Programs are labels used to organize classes into groups. Each class in iClassPro is part of a program (Gymnastics, Cheer, Swim, Dance, etc.) To save time, you will want to set up all of your programs before creating classes. When you create your classes, you will need to attach each one to a program.

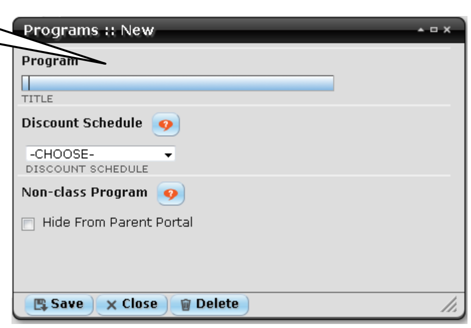
Click the pencil icon to start editing your programs.



Click the create new button to make a new program.



Enter a title for your new program. *(Gymnastics, Cheer, Swim, Dance, etc.)*

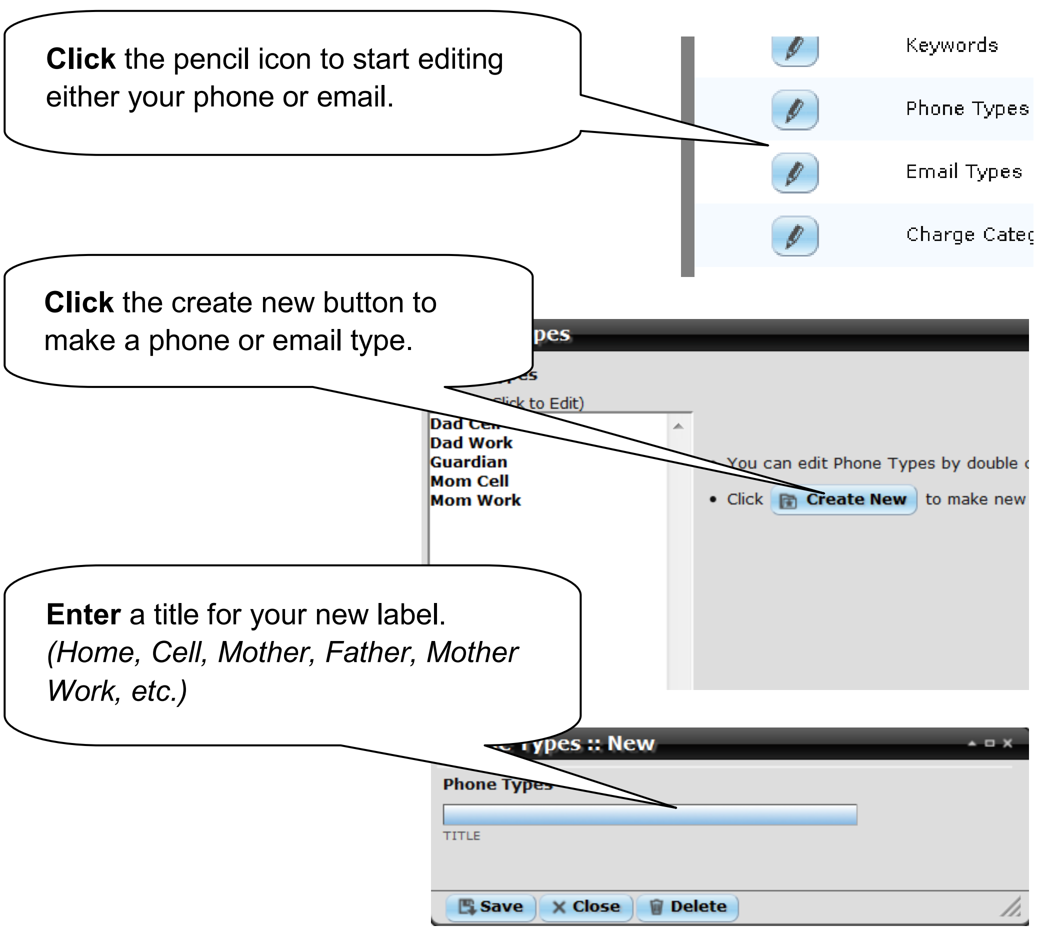


Make sure to click the Save button after creating each program.

The Setup Section > General Settings *(continued)*

Keywords—Keywords are an amazing feature to help you filter or group families, students, classes, or staff for marketing, communication, or reports using iClassPro. You can always set this up later. See our support website for more information on how to use keywords.

Phone and Email Types—You can customize the labels used to describe phone numbers and emails that you save in iClassPro for family and staff. These are also available for the customers to choose as their phone or email type in the customer portal. Customize both phone and email types before entering data into iClassPro to save time.



Make sure to click the Save button after creating each label.

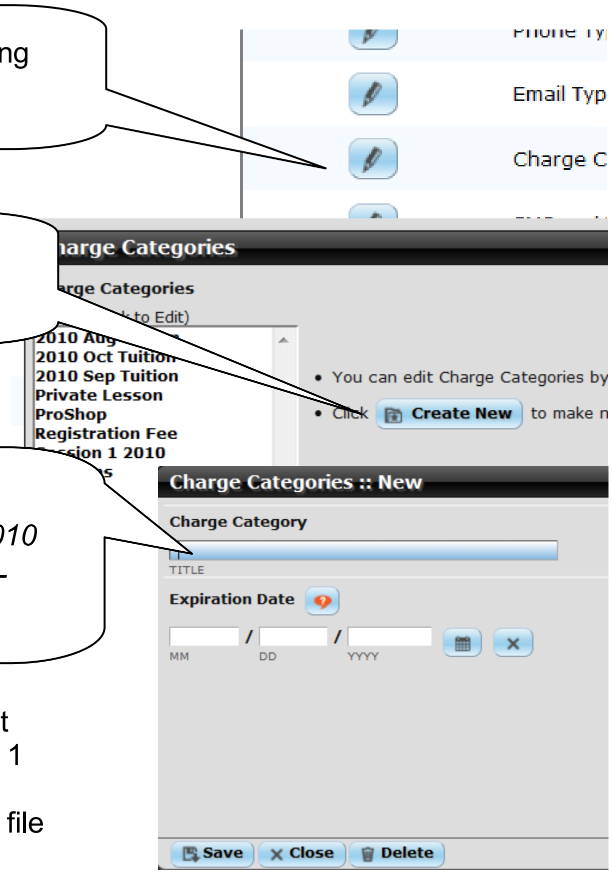
The Setup Section > General Settings *(continued)*

Charge Categories—Charge categories are used to describe charges that you create and post to a client's ledger. The charge category will appear as part of the charge title on the account statement, family ledger, and customer portal ledger. You will need to create charge categories before you can create any charges.

Click the pencil icon to start editing charge categories.

Click the create new button to start making charge categories.

Enter a title for your new charge category. *(Reg. Fee, Proshop, 2010 Aug Tuition, Session 1 2010, Uniforms, etc.)*



An expiration date is used to prevent old Charge Categories, like Session 1 2009, from showing up in the list for new charges while still keeping it on file for reference.

Make sure to click the Save button on all forms after making any changes

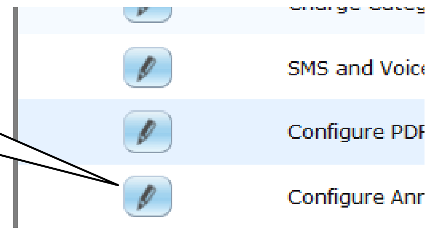
SMS and Voice—Set up and configure the SMS and voice capabilities of iClassPro. Just click the pencil icon next to that setting and follow the on-screen instructions. See our support website to learn how to send SMS and Voice messages to your clients.

Configure PDF Viewing—iClassPro allows you to view your PDF reports by using your default PDF viewer, such as Adobe Reader, or by using the Google Docs app in your web browser.

The Setup Section > General Settings *(continued)*

Configure Anniversary Charges—Set how your anniversary / registration charges will be applied, and set your default fee amount.

Click the pencil icon to edit the anniversary charges setting.



Charge a fee per student or per family.

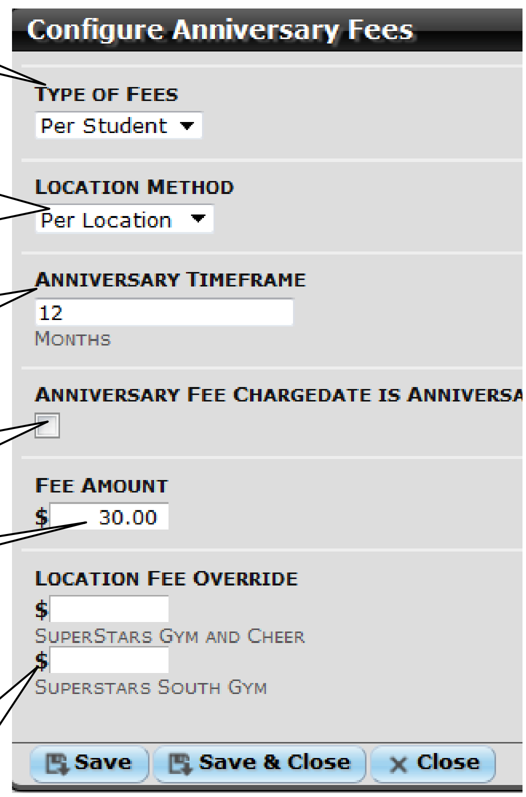
Choose the location method. Per location applies a charge for each location a student is enrolled in. All locations applies only one charge.

Specify how often you want a anniversary fee applied.

Check this box if you want the charge date to be the anniversary date.

Enter your fee amount.

The location fee override amount fields only appear if you choose the per location method. If you leave blank, the charge amount will be the fee amount you entered in the fee amount field.



Make sure to click the Save button when you are finished making changes.

The Setup Section *(continued)*

B. Class Settings

These settings should be configured before the classes are created.

Class Template—In the case you want to track additional information for all of your classes, iClassPro gives you the ability to add a custom field for each class.

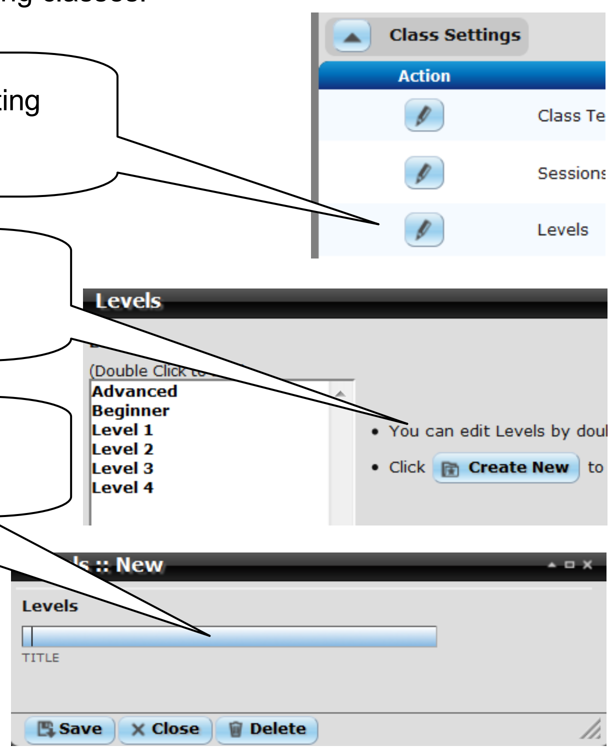
Sessions—Sessions are commonly referred to as seasons or terms. Sessions are a period of time that you can enroll a student in a class. You can create and label those time periods on this setting page. Students enrolled in a class assigned to a Session will be automatically dropped on the session end date. Therefore, sessions might no be the best option for you if you assume students are coming back after each session. Refer to our knowledge base for more information on sessions.

Levels—Levels are assigned to classes to express the skill level requirements of a class. They can be used for additional filtering / grouping on the class list, customer portal class list, enrollment window, and reports. You may want to create levels now to save time when creating classes.

Click the pencil icon to start editing your levels.

Click the create new button to make a new program.

Enter a title for your new level. *(Beginner, Advanced, etc.)*



Make sure to click the Save button after creating each level.

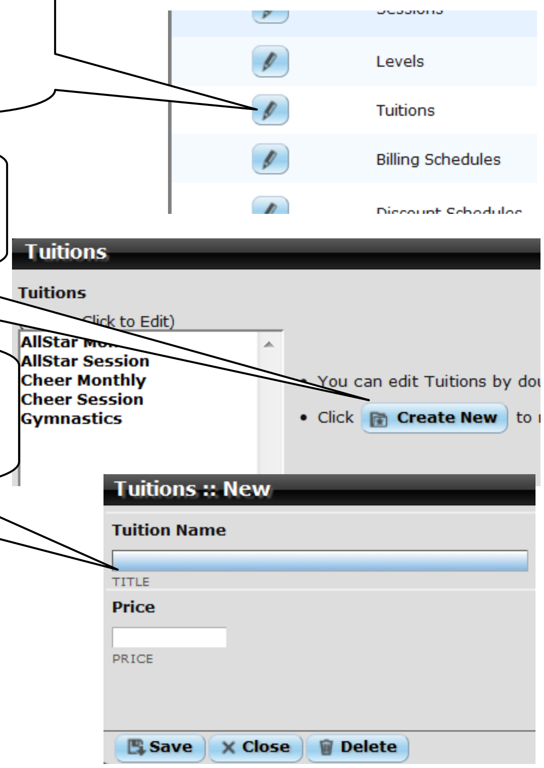
The Setup Section > Class Settings *(continued)*

Tuitions—The tuition prices that you create here are the undiscounted prices that you can assign to a class for a specific billing schedule (monthly, session, etc.) Each class is assigned a default tuition price. You will want to create these before creating your classes to save you time. You can create as many as you need.

Click the pencil icon to start editing your tuition prices.

Click the create new button to make a new tuition price.

Enter a title and price for each of your tuitions.. *(AllStar Cheer, $250)*



Make sure to click the Save button after creating each tuition.

Billing Schedules—The billing schedule is the frequency at which you charge tuition for a particular class (Monthly, Session, Weekly, etc.) Billing schedules are used to determine which students get charged when you run the global tuition billing. For instance, if you attach the session billing schedule to all of your classes, when you run global tuition charges all students who are enrolled in a class with that billing schedule will be charged the tuition price.

Billing schedules should be configured before creating your classes.

You can follow the same steps from above to create the billing schedules.

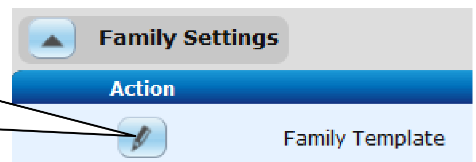
The Setup Section > Class Settings *(continued)*

Discount Schedules—This is where you can set up multiple class, multiple sibling, and special discounts. You can create multiple discount schedules and specify your discount criteria under this setting. Discount schedules are applied to programs, but can be overridden at the class level. Only one discount schedule can be applied to an individual program or class. For more information on setting up discount schedules, refer to our knowledge base or contact support.

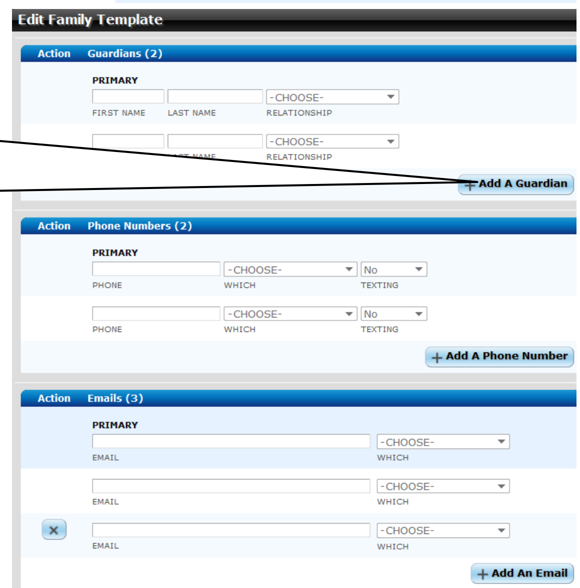
C. Family Settings

Family Template—In iClassPro, templates allow you to control the form used to track the details for your families. This allows you to create as many guardian, phone number, email, and address fields as you need for a family.

Click the pencil icon to start editing the family template.



Click the appropriate buttons to add the desired fields. You can create as many as you need. Be sure to click save.



Important Note About Templates:

If you create extra fields and store data in those fields, removing any of those custom created fields in the future will cause the data in those fields to be lost.

Relationships—Relationships describe how guardians or emergency contacts relate to a student. For example, mother, father, or grandparent would be a relationship. These should be configured before entering data into iClassPro. You can always change them later.

It's important to remember that the relationships defined here, just like phone and email types, can be chose from the customer portal as an option on the family page.

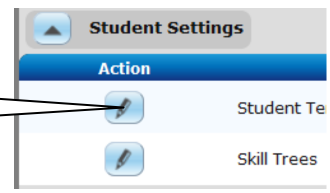
The Setup Section > Family Settings *(continued)*

How Did You Hear About Us—You can customize the "How Did You Hear" options in this drop down menu. Your clients can choose one when signing up from the customer portal. You can choose one when creating a new family in iClassPro.

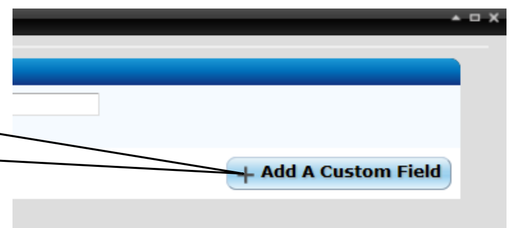
D. Student Settings

Student Template—The student template allows you to create custom fields on the student form for extra information that you want to track for each student.

Click the pencil icon to start editing the Student template.

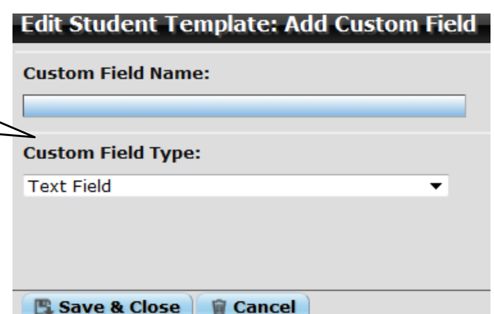


Click the Add A Custom Field button to add a new field.



Give the new field a title.

Decide if you want a text field or a larger text box.



Click the save and close button.

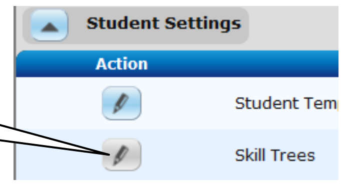
Create as many custom fields as you need.

Remember: Removing any of these custom created fields in the future will cause the data in those fields to be lost.

The Setup Section > Student Settings *(continued)*

Skill Trees—Track multiple events and skills using the iClassPro Skill Tree. Customize the skill tree to meet your exact specifications. For each event you have a level and a skill. For each skill you can give a description. Then, when editing a student, you can mark a status and leave notes for each skill (started, completed, etc.)

Click the pencil icon to start editing the student Skill Tree.



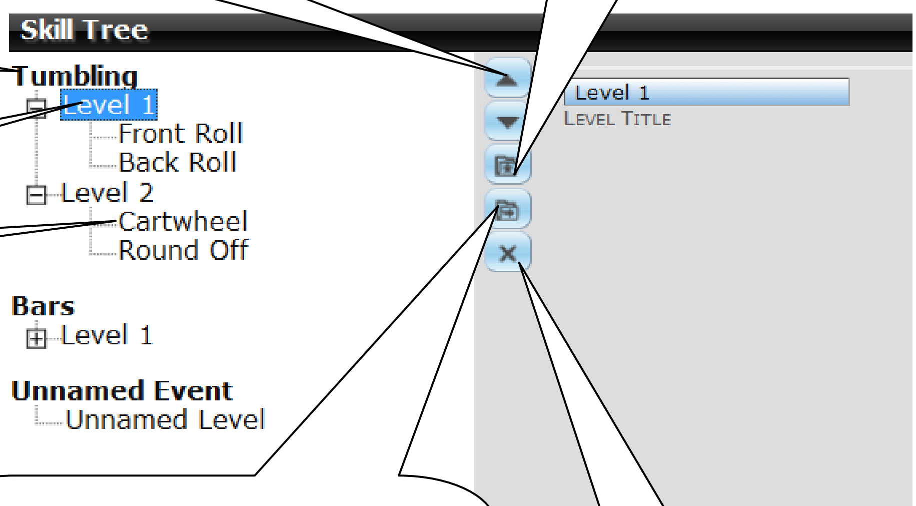
Use the arrows to arrange events in the skill tree to be in the desired order.

Click the new event button to add an event.

Event

Level

Skill



Click the level down button to insert a level under the selected event.

Click the level down button again to insert a skill under the selected level.

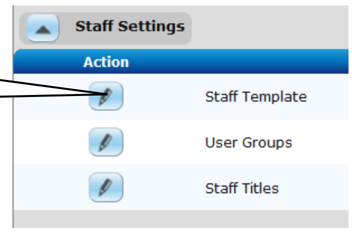
Use the **X** button to delete an event, level, or skill.

Make sure to click the Save button after making any changes

The Setup Section > Staff Settings

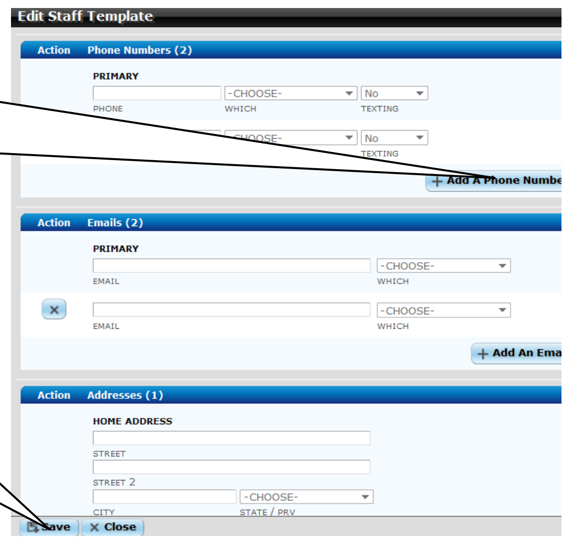
E. Staff Settings

Staff Template—The staff template allows you to control the form used to track staff information. This allows you to create as many phone number, email, address, and custom fields that you want to track.



Click the pencil icon to start editing the staff template.

Click the appropriate buttons to add the desired fields. You can create as many as you need. Be sure to click save.



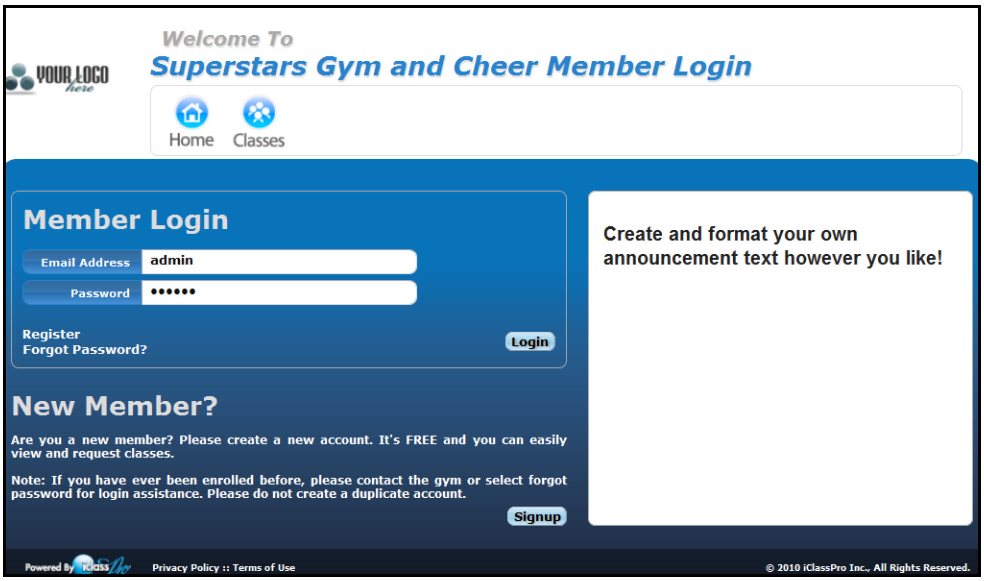
Click the save button when you're finished making changes..

Remember: Removing any of these custom created fields in the future will cause the data in those fields to be lost.

Staff Titles—Staff titles are labels that you can assign a staff member such as owner, manager, coach, office staff, etc. To save time, these should be configured before creating staff members.

6. Customer Portal Section

The customer portal section contains all of the settings pertaining to the portal and the necessary code to install the customer portal on your website. Customize the customer portal to fit your specific needs. Go through the page to view each available settings. There is a ‘Preview Customer Portal’ button to see how your data is shown in the customer portal so that you can test your settings and see how your other data shows in the portal.



Remember to keep in mind that some of the data that you enter in iClassPro such as classes, phone and email types, and family relationships can be seen in the customer portal.

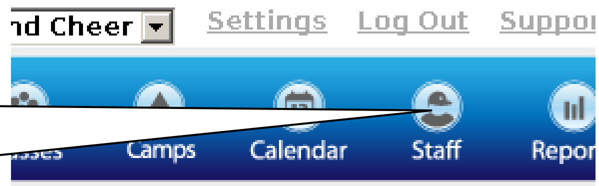
Additional Set up Information: Be sure that your browser accepts cookies from iClassPro. Cookies are required in order for you to log in. Also, be sure that you allow pop-ups from iClassPro. The only time you will get a pop up is for our Re-Log in window. After your session expires, iClassPro will pop up a window for you to log in again without losing your work.

Step 2: Create Staff Members

Staff members in iClassPro can be instructors that you attach to classes. The number of staff members you can create is unlimited. Also, you can give each staff member their own username and password to access iClassPro. If you setup user groups in the previous section, then, you can quickly assign a group of permissions to each staff member. Follow the instructions below to create staff members.

Click the Staff button at the top of the page.

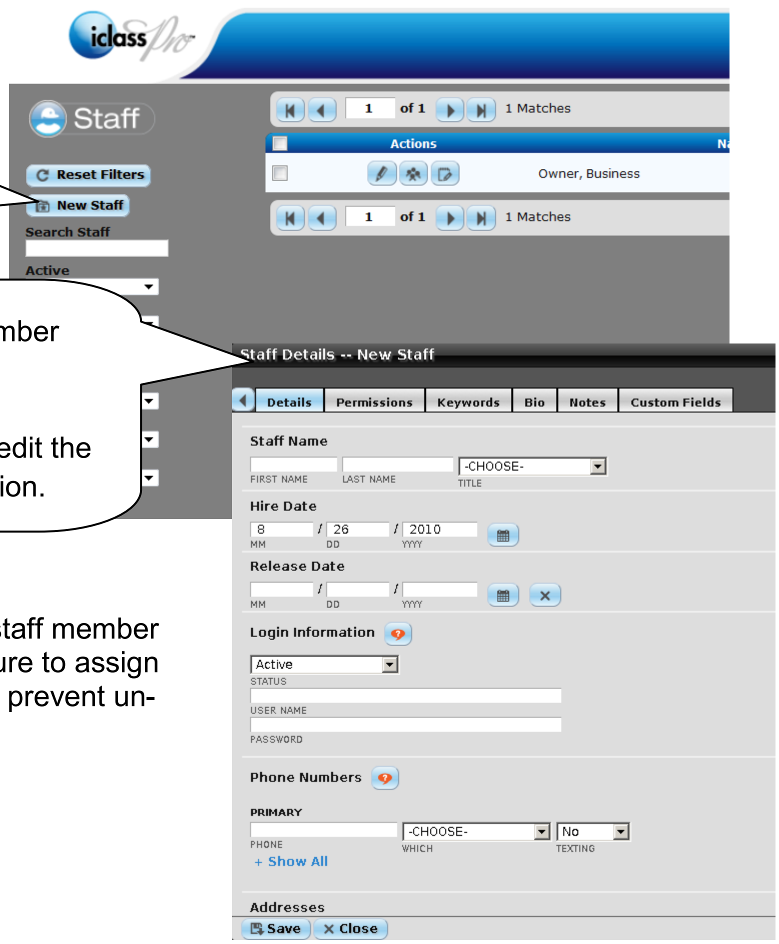
This will take you to the staff list page.



Click the new staff button on the left-side of the page and the staff details window will open.

Enter the details for the staff member you are creating.

If you need more fields, you can edit the staff template in the settings section.



You can create as many staff member log ins as you need. Be sure to assign the correct permissions to prevent unwanted data access.

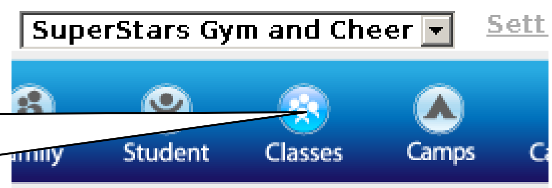
Make sure to click the Save button on the form after making any changes

Step 3: Create Classes

After the necessary settings in iClassPro are configured, you are ready to begin creating classes. iClassPro bills based on class enrollment. A student will automatically assume the default billing schedule and tuition that you create for a class. If you need to discount an individual student's tuition you can do this by setting up a discount schedule or manually overriding the tuition amount shown when enrolling the student.

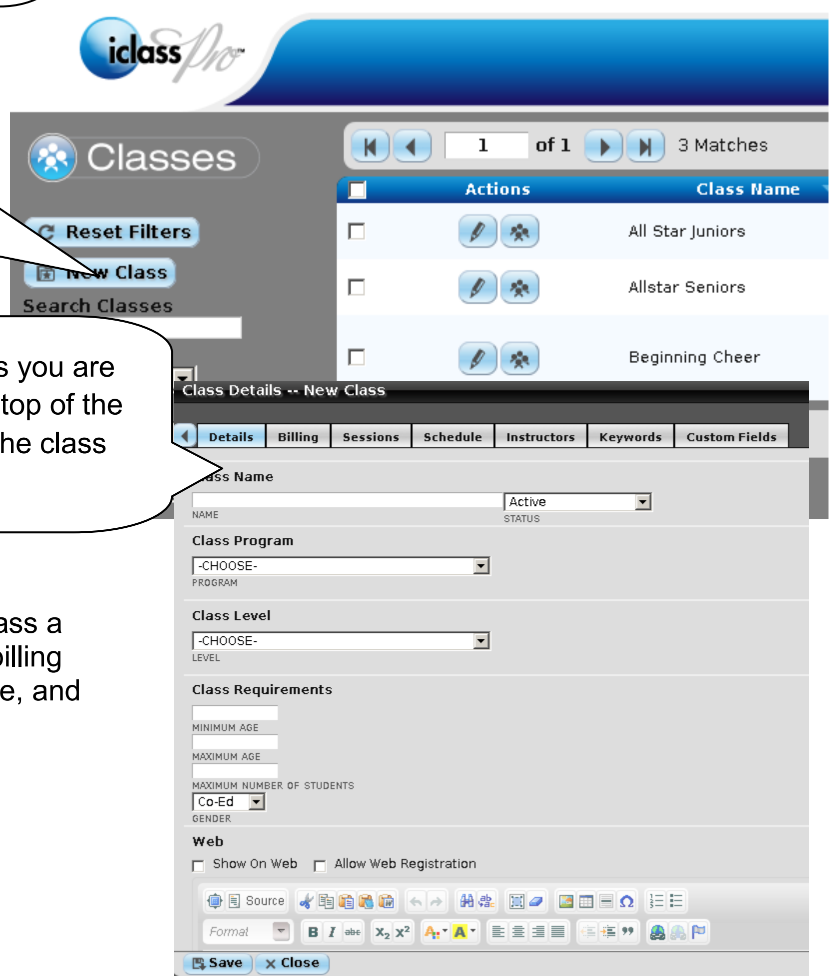
Click the Class button at the top of the page.

This will take you to the **class list page**.



Click the new class button on the left-side of the page and the **class details window** will open.

Enter the details for the class you are creating. Use the tabs at the top of the window to navigate through the class details and settings.



Be sure to give each class a program, tuition price, billing schedule, daily schedule, and instructors.

Make sure to click the Save button on after entering the class details.

Step 4: Create Families and Students

A Family in iClassPro is an account where you store all the details for that family including student information, enrollment information, payments and charges, and notes. In iClassPro, there must be a family record first before creating student records.

Creating a Family:

Click the Family button at the top of the screen.

This will take you to the **family list page**.

Click the new family button on the left-side of the page and the **family details window** will open.

Enter the details for the family you are creating. Use the tabs at the top of the window to see the different sections.

Students—Create and edit students

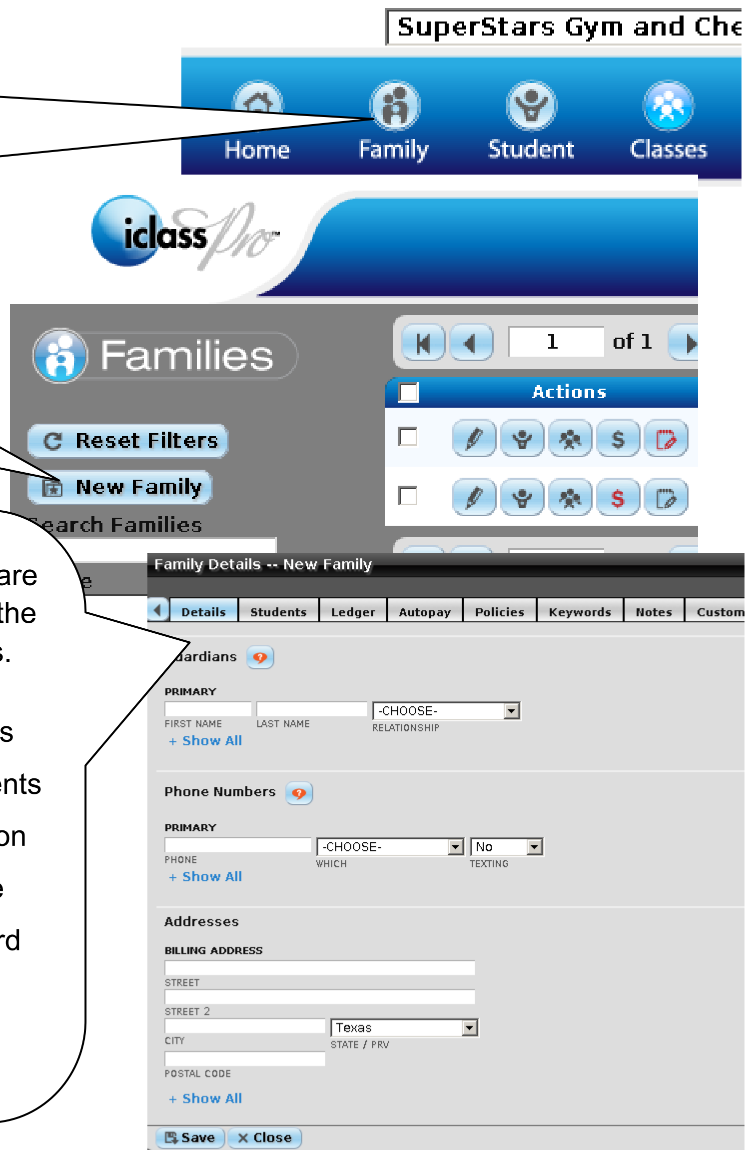
Ledger—Enter charges and payments

Autopay—Save payment information

Policies—Track waiver acceptance

Keywords—Tag family with keyword

Notes—Enter important notes



Make sure to click the Save button on after entering the family details.

Step 4: Create Families and Students *(continued)*

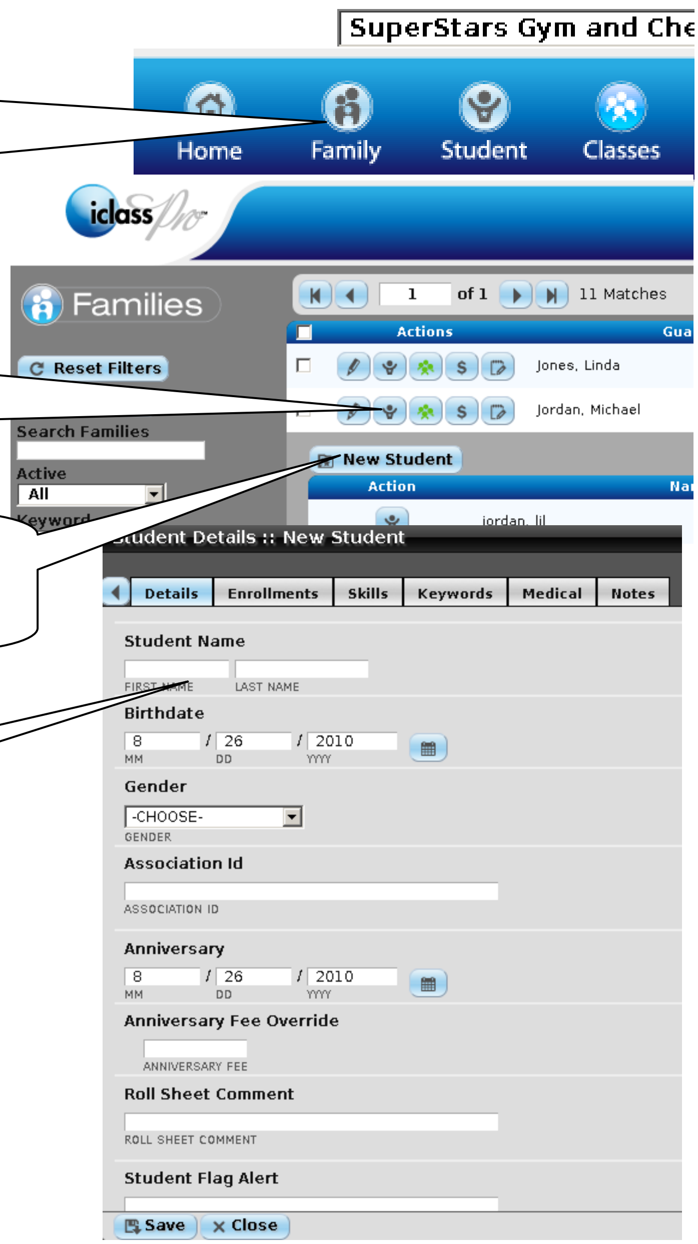
Creating a Student:

Click the Family button at the top of the screen to go to the **Family List Page.**

Click the student icon on the family that you want to add a student to open the student summary.

Click the new student button to open the **student details window.**

Enter the details for the new student.



Make sure to click the Save button on after entering the student details.