

# Interactive QuickStart Guide

Lesson Public View / Corresponding Admin Setup Name

1 Programs/Classes Or Instructor This is the first tabs the public will see. Signup by Program/Classes or by Instructor.

2 Locations - If you have multiple locations/times you can set the filters to narrow down the options for available classes.

3 Program - You will create as many programs as necessary. For instance Preschool, School Age, Masters etc.

4 Subprogram - You will create as many of these as necessary for ease of navigation. For instance you might have Advanced, Intermediate, Beginner, Water Babies.

5 Session - Sessions are used to further narrow down the class options. Examples would be to have sessions that are Monday, Tuesday, Wednesday etc. Or they could be a date range. Applying this filter will only bring up the classes that are in this session.

6 Location - This is setup and once applied to a class offers two functions. The public will be able to filter by location (for instance a pool) and also bring up the corresponding map.

7 Class - Class setup is where you will tie it all together for the public to register. A class will have the date, time, cost. You can see from the screenshot that the public will be able to see what time and on what day that class will be offered.

8 Class Cost/Days/Times - Your public will select this button to open up the Register button

9 Register - Your public will select this button to sign up for the corresponding class.

The screenshot displays the 'Swim Lessons' public interface. At the top, there are tabs for 'Programs/Classes' and 'Instructors'. Below these are filters for 'Location Filter' (set to '--ALL Locations--'), 'Time Offered' (set to '--ALL--'), and 'Days Offered' (set to '--ALL--'). A welcome message and registration instructions are provided. The main content area shows a list of programs, with 'TUTraining Swim School' selected. Underneath, there are sub-program tabs: 'Birthday Parties Registration', 'Water Babies', 'Beginner', 'Intermediate', and 'Advanced'. The 'Water Babies' sub-program is active, showing a session filter for 'Monday' and a class filter for 'Water Babies-Monday (9/11/14)'. A detailed view of the 'Water Babies-Monday' class is shown, including a class date range (9/1/14 to 1/1/14), duration (30 min), age (Open), and a table of session times. The table shows sessions on Monday at 10:30am and 11:30am, and on Wednesday, Thursday, Friday, and Saturday at 10am. Fees are listed as \$65.00 for Juniper (7) and \$65.00 for Juniper (9). A 'Location Map' button is also visible. Below the class details is a 'Lesson Admin' section with a navigation menu (System, Classes, Students, Instructors, Heat Map, Acnts/Revenue, CoA, Trans Rpt, Admin Rpts) and a search bar. A table at the bottom lists programs and sub-programs:

Program Title	Display Order	Sub Programs	Program Description
Group Lessons	1	Adult Swim Lessons Preschool Beginner Preschool Intermediate Preschool Advanced School Age Beginner School Age Intermediate School Age Advanced Parent & Tot	<b>YOUR PROGRAM NAME</b> offers a wide variety of... <b>HOW TO CHOOSE THE RIGHT PROGRAM FOR</b> Please click on each of the tabs below to read... Click the Your Program Name to send us an E...
Private & Semi-Private Lessons	3	Emily Howland Josh Hillman Brent Jones Andrea Smith	<b>HOW TO REGISTER</b> To register for Private or Semi Private lesson... Once you have a confirmed schedule set with... If registering for a Semi-Private class, you...
TUTraining Swim School	1	Birthday Parties Registration Water Babies Beginner Intermediate Advanced PreComp	
Water Aerobics	4	Aqua Aerobics Total Body Conditioning Aqua Dance	Come join our water aerobic classes. Our cla...

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Let's Get STARTED - Team Admin > Lesson Admin and you're all ready to create a lesson master-piece!

- 1 System Edit - You can't edit anything in the system tab without selecting Edit in the bottom right.
- 2 System Parameters - You must fill these in to setup the system such as what email will the receipts be sent from.
- 3 Annual Registration Fees - The system can collect either annual Per Student or annual Per Family or both. The date they first register will be their anniversary date.
- 4 User Defined Fields - These are setup in Team Admin > Team Profile and can be enforced in this area.



[Lesson Overview](#)



[System Setup Detailed Information](#)



[Annual Registrations Fees](#)

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- 1 Accepted Payment Methods - Everyone has check functionality enabled. If you don't see the CC toggle please contact TeamUnify to apply for CC.
- 2 Discounts - Our system can apply discounts for multi-student and/or multi class and by dollar or percentage. Apply them at the sub program level.
- 3 Coupons - You can create as many custom coupon codes as you would like but only one can be used at checkout at a time. Apply these at the subprogram level.

**Accepted Payment Method(s)**

Check Accepted: YES  Credit Card Accepted: YES  1

\*Remittance Name: Team  
 \*Address: 123 Juniper  
 \*City: Bend  
 \*State: or \*Zip Code: 97701  
 \*Phone: 541111234

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**Discounts**

(If you define up to 10 Students and the user enters more than 10 Students, the system will use the Discount amount you defined for 10 Students. Multi-Classes Discount also works in the same manner.)

Multi-Students Discount (Per Reg): YES  Multi-Classes Discount (Per Reg and Per Student): YES

Chart of Account: Mount Bachelor - S3 GL [Pick]

Multi-Students Discount			
<input type="checkbox"/>	From	To	Discount
<input type="checkbox"/>	2	3	\$10.00
<input type="checkbox"/>	4	5	\$20.00

2

Multi-Classes Discount			
<input type="checkbox"/>	From	To	Discount
<input type="checkbox"/>	2	5	\$20.00

3

**Coupons**

(You can define the coupons by dollar amount or percentage of **Class Fee** based on per student and per class.)

Coupons (Per student and per class): YES

Lesson Coupon [Double click a row to edit]						
<input type="checkbox"/>	Coupon Title	Coupon Code	Chart of Account	Starting Dat	Expiration D	Discount
<input type="checkbox"/>	Fall Festival of Savings	fallfest	Juniper Center S3 GL	10/21/2013	10/29/2013	10.00

- [Multi Swimmer Dollar Discount](#)
- [Multi Swimmer Percentage Discount](#)
- [Multi Class Discount](#)

- 4 Title Page - Your title page is the front facing information on your swim program. Remember this is the first thing your public will read so take the time to keep it concise.
- 5 Agmt 1-5 - Your agreements are generally your medical waivers, liability forms, picture opt-outs etc. You can have all of them as waivers to sign or none it's up to your business. Either make them optional or required.

4 Title Page 5 Agmt 1 Agmt 2 Agmt 3 Agmt 4 Agmt 5 6 Success 7 Email Promo

Optional Required

Enable Agreement I: YES  Agreement Type  Required

**Title:** Medical Release Waiver

Source [Icons]

**B I U S x<sub>2</sub> x<sup>2</sup>** [Icons]

Styles - Format - Font - Size - A- A+ [Icons]

I certify that I am the parent or legal guardian for my child(ren). I hereby give my permission for any supervisor, coach or other team administrator associated with the?Your Program Name?to seek and give appropriate medical attention for our child(ren) in the event of accident, injury, illness. I will be responsible for any and all costs associated with any necessary medical attention and/or treatment.

I hereby waive, release and forever discharge?Your Program Name?from all rights and claims for damages, injury, loss to person or property which may be sustained or occur during participation in?Your Program Name?activities, whether or not damages or loss is due to negligence. I hereby acknowledge that my children is (are) physically fit and capable of participation in all Swim Team activities.

Words: 256

Save Changes

- 6 Success - This is the final screen that will show after they have checked out.
- 7 Email Promo- This tab is helpful as a placeholder for text but otherwise has no functionality.

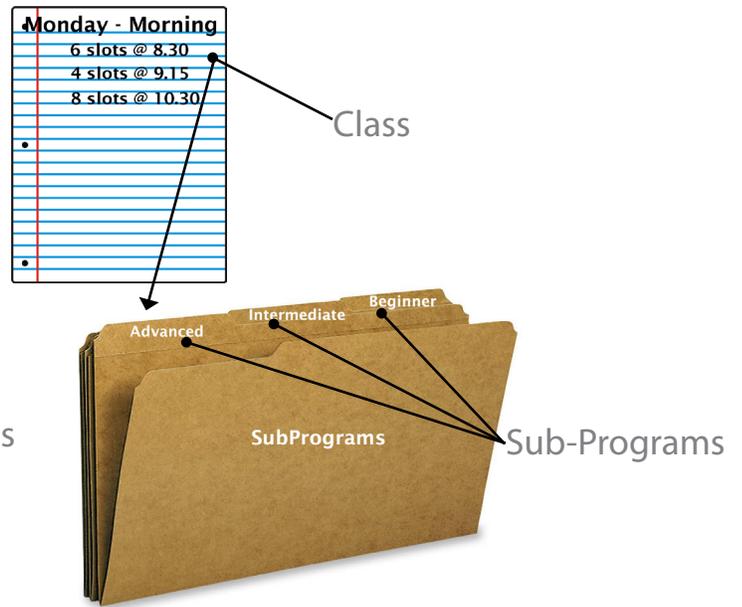
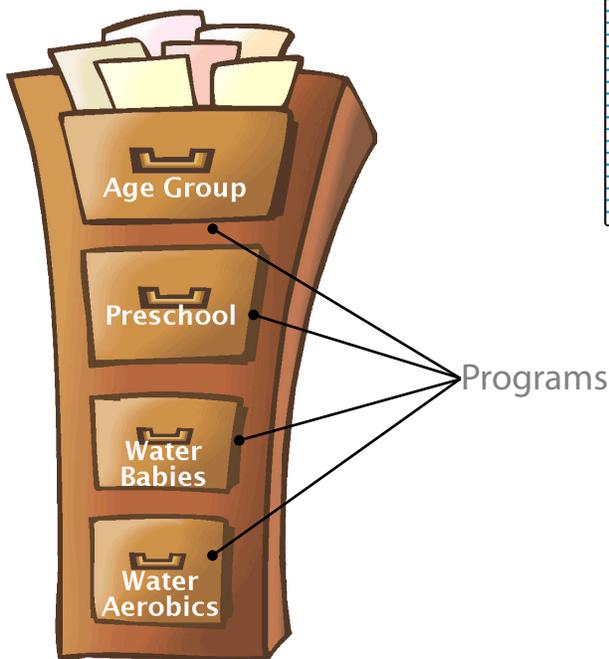
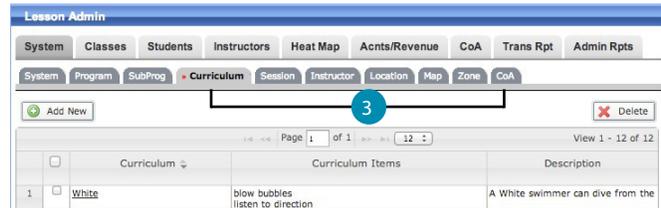
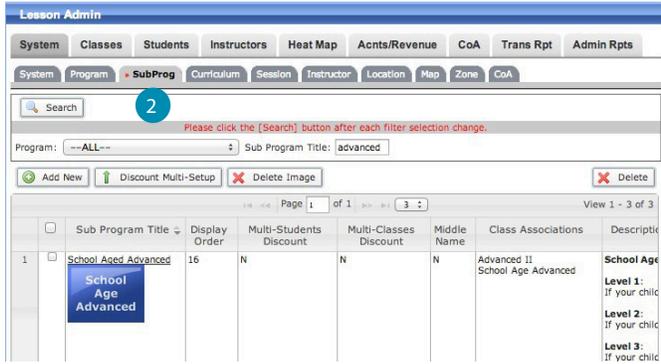
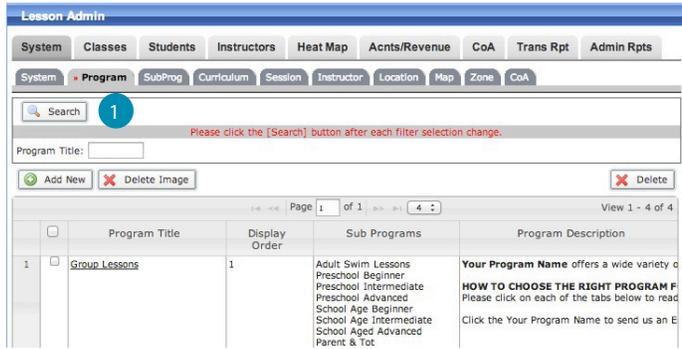
# QuickStart Guide

- 1 Program - This is critical to have setup correctly as it helps your public navigate. Remember this is a tab on the public side. Think of it as your File Folder.
- 2 SubProgram - This is also critical for navigation and you'll also apply not only the discounts and coupons within each one but you can also add on an additional question to implement more discounts or charges. Think of this as your file within your folder from above.
- 3 Additional Tabs - You have to add at least one option in each tab in order to start creating classes. Each class will need to be attached to one of these items (session/instructor is optional so if you don't want to use these you don't need to add)

 [What is a program/subprogram/class?](#)

 [How do sessions work?](#)

 [Instructor Access](#)



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**1** Information - Enter in a title that defines this class. If you have already made your **Program** - Group lessons for example and **Sub Program** is Advanced then your title shouldn't duplicate. Decide the order you would like it in and turn it on if you're ready.

**2** Picks - Select the picks on the right to attach all of the appropriate pieces to the class.

**3** Dates - The dates are all very important and you **MUST** have both start/end dates for all parameters.

**4** Class Fees - Class fee is the actual amount of the class and prorate works off of this. Registration fees will be per reg and are different than the annual fee.

**5** Monthly Class fee is the recurring lesson system that bills the class fee on the first of every month.

**6** Class Grid - The grid is the heart of the class. Enter in the slot limit & how many kids are allowed in this class. Enter in the times under each day this ONE class is available. Select an instructor or 'Not Assigned' if you aren't assigning an instructor.

**Class Edit**

Class ID: 273109

\*Class Title:  1

Display Order:

\*Status:

\*Sub Program:  [Pick]

\*Curriculum:  [Pick]

Session (optional):  [Pick] | [Clear] 2

\*Location:  [Pick]

\*Map:  [Pick]

\*Pool Zone:  [Pick]

\*Class Start/End:  -

\*Display starting from:

\*Open for Registration:  12:01 AM -  07:00 AM 3

Open for Returning Members:  12:01 AM -  07:00 AM

Open for New Members:  12:01 AM -  07:00 AM

Allow Wait List:  (Note: accepting **Check** as a payment method automatically turns on the **Wait List**)

\*Class Length:  minutes

Age Limit:  -  (Years)

(blank, if none): Date used to calculate Age:

[Insurance/Emergency] Entry Fields:

\*Registration Fee Per Class: Per Family: \$0.00 Chart of Account: Private Lessons 5+ yr [Pick]

Per Student: \$0.00 Chart of Account: Private Lessons 5+ yr [Pick]

\*Class Fee (Per Participant): \$150.00 Chart of Account: Group Lessons JAC [Pick] 4

Prorate Class Fee:

Prorate on "No Class Days":

Charge Class Fee Monthly:  (Will charge **Class Fee** above on the **1st** of every month) 5

No Class Days:    
 Note: Use **MM/dd/yyyy** to exclude a particular date. Use a **comma** to separate dates.

Reg Slot	Slot Limit	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
#1	10	10:00 AM : Josh H. :	AM : :	10:00 AM : Josh H. :	AM : :	10:00 AM : Emily H. :	AM : :	AM : :
#2	8	AM : :	AM : :	AM : :	05:30 PM : Brent J. :	AM : :	10:30 AM : [Not Assigne] :	AM : :
#3	6	AM : :	09:00 AM : Emily H. :	AM : :	AM : :	AM : :	08:00 AM : [Not Assigne] :	AM : :
#4		AM : :	AM : :	AM : :	AM : :	AM : :	AM : :	AM : :
#5		AM : :	AM : :	AM : :	AM : :	AM : :	AM : :	AM : :
#6		AM : :	AM : :	AM : :	AM : :	AM : :	AM : :	AM : :
#7		AM : :	AM : :	AM : :	AM : :	AM : :	AM : :	AM : :

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 [Class Setup](#)

 [Class Clone](#)

# QuickStart Guide

- 1 Swim Lessons Tab - This will be defaulted to 'Hide'. TeamUnify suggests that you keep it hidden until you are ready to view your setup. When you select it, you will be able edit the title if necessary.
- 2 Hide this Tab - Leave this as 'Yes' until you are ready to view your setup.
- 3 Access Control - When you are ready to open this to the public select 'Everyone'. TeamUnify suggests leaving this as SuperUser only until you have confirmed the setup is correct.
- 4 Home Page Lesson View - Under Lesson Admin > Website Design > Website Design Configuration you will have the option to show the lessons on your home page or turn them off. TeamUnify suggests leaving this number as 0 until you are ready to have them viewed by the public.
- 5 Command Buttons - Within your website design controls you can have the lessons be connected to a command button. Once you unhide your lessons from step one, go that tab and paste it into your command URL as seen on the right.

The screenshots show the following configuration steps:

- Step 1:** The 'Tabs' table lists 'TAB\_Swim\_Lessons' with a displaying order of 3. A red circle '1' is next to the tab name.
- Step 2:** The 'Tab Edit' form shows 'TAB\_Swim\_Lessons' with 'Swim Lessons' as the label, 'NO' for 'Hide this Tab?', and 'Everyone' for 'Access Control'. A red circle '2' is next to the 'Hide this Tab?' dropdown.
- Step 3:** The 'Tab Edit' form shows 'TAB\_Swim\_Lessons' with 'Swim Lessons' as the label, 'NO' for 'Hide this Tab?', and 'Everyone' for 'Access Control'. A red circle '3' is next to the 'Access Control' dropdown.
- Step 4:** The 'Home Page Section Controls' table shows 'Swim Lessons' with a 'Tab Order' of 2. A red circle '4' is next to the 'Tab Order' value.
- Step 5:** The 'Command Button Controls' form shows a list of command buttons. The second button, labeled 'Lesson Program', has a URL of 'http://www.teamunify.com/SwimLessons.jsp?\_tabid\_=7470'. A red circle '5' is next to the button label.

[Management & Reporting](#)  
Tutorial

[Student Tab - Moving/Adding/Managing](#)  
Tutorial