

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' (1) and 'Instructors'. Below these are filters for 'Location Filter' (2), 'Time Offered', and 'Days Offered'. A welcome message and registration instructions are provided. A list of programs is shown, including 'TUTraining Swim School' (3). Under 'Group Lessons', there are sub-program tabs: 'Birthday Parties Registration', 'Water Babies' (4), 'Beginner', 'Intermediate', and 'Advanced'. The 'Water Babies' sub-program is selected, showing a session filter for 'Monday' (5) and a class filter for 'Water Babies-Monday (9/11/14)'. A table lists classes with columns for days (Mon-Sun), times (10:30am, 11:30am), and costs. A 'Location Map' button (6) is visible. A 'Class Cost/Days/Times' button (8) and a 'Register' button (9) are also present. Below the class list, there is a 'Lesson Admin' section with tabs for 'System', 'Classes', 'Students', 'Instructors', 'Heat Map', 'Acnts/Revenue', 'CoA', 'Trans Rpt', and 'Admin Rpts'. The 'Classes' tab is active, showing a search bar and a table of programs with columns for 'Program Title', 'Display Order', 'Sub Programs', and 'Program Description'.

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	YOUR PROGRAM NAME offers a wide variety of... HOW TO CHOOSE THE RIGHT PROGRAM FOR YOU Please click on each of the tabs below to read... Click the 'Your Program Name' to send us an Email
Private & Semi-Private Lessons	3	Emily Howland Josh Hillman Brent Jones Andrea Smith	HOW TO REGISTER 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...

QuickStart Guide

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 Admin

System Classes Students Instructors Heat Map Acnts/Revenue CoA Trans Rpt Admin Rpts

System Program SubProg Curriculum Session Instructor Location Map Zone CoA

Email Address used to send receipt emails: lessonadmin@team.com
 Name used to send receipt emails: Instructor Debbie
 Accepted Payment Method(s): Check, Credit Card (Default Bank)
 Hide [Instructors] tab from public viewing: No - Show to ALL
 Hide Instructor Schedules from Non-Admins: No - Show to ALL
 Allow Sending Emails on [My Instructor's Page]: Yes
 Require Annual Registration Fee: Per Family: No
 Per Student: No

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

The following message will be shown on the first page of the registration:

Welcome to the Sharks Swim School Electronic Lessons platform! The registration process is **simple for both new and returning families**. You'll get access to your own private account to view/edit your contact information and current and past class histories. **To Register:**

1. Select/click on the desired **Program** below [Grey bar(s) below]
2. Select the **Sub-Program** tab.
3. Click on the **Red View Days/Times/Cost** Button to pick the day and time
4. Click on the **red Register** Button to register for the class of your choice
5. Repeat process to **add multiple students** into the same registration/shopping cart

To edit any of these parameters you must select the Edit to begin

Edit



[Lesson Overview](#)



[System Setup Detailed Information](#)



[Annual Registration Fees](#)

Lesson System Edit

*Email Address used to send receipt emails: lessonadmin@team.com

*Name used to send receipt emails: Instructor Debbie

*Waitlist check payer even when slots available: YES - Waitlist Check Payer

*Hide [Instructors] Tab from public viewing: NO - Show to ALL

*Hide Instructor Schedules from Non-Admins: NO - Show to ALL

*Allow sending Emails On [My Instructor's Page]: YES - Allow

*Hide Time Offered: NO - Show

*Hide Days Offered: NO - Show

*Annual Registration Fee (Per Family): NO

*Annual Registration Fee (Per Student): NO

[Membership #] Show but Optional

Account Custom Field: Show but Optional

[High School Name] Show but Optional

Member Custom Field: Show but Optional

QuickStart Guide

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.

✓ [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.

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?](#)

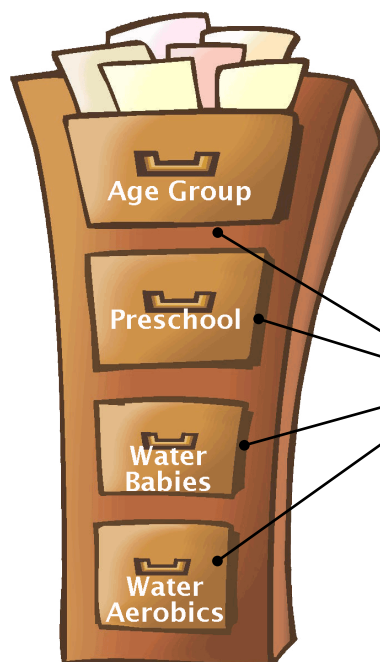


[How do sessions work?](#)

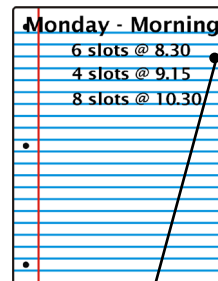


[Instructor Access](#)

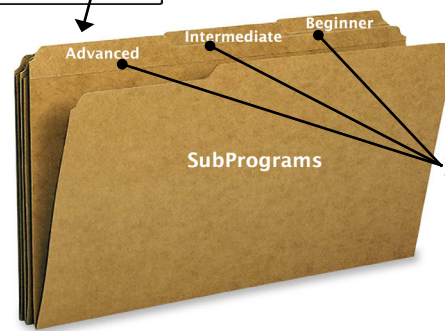
Tutorial



Programs



Class



SubPrograms

Sub-Programs

Lesson Admin

System Classes Students Instructors Heat Map Acnts/Revenue CoA Trans Rpt Admin Rpts

System Program SubProg Curriculum Session Instructor Location Map Zone CoA

Search 1

Please click the [Search] button after each filter selection change.

Program Title:

Add New Delete Image Delete

Program Title	Display Order	Sub Programs	Program Description
1 Group Lessons	1	Adult Swim Lessons Preschool Beginner Preschool Intermediate Preschool Advanced School Age Beginner School Age Intermediate School Aged Advanced Parent & Tot	Your Program Name offers a wide variety of... HOW TO CHOOSE THE RIGHT PROGRAM... Please click on each of the tabs below to read... Click the 'Your Program Name' to send us an E...

Lesson Admin

System Classes Students Instructors Heat Map Acnts/Revenue CoA Trans Rpt Admin Rpts

System Program SubProg Curriculum Session Instructor Location Map Zone CoA

Search 2

Please click the [Search] button after each filter selection change.

Program: --ALL-- Sub Program Title: advanced

Add New Discount Multi-Setup Delete Image Delete

Sub Program Title	Display Order	Multi-Students Discount	Multi-Classes Discount	Middle Name	Class Associations	Description
1 School Aged Advanced	16	N	N	N	Advanced II School Age Advanced	School Age Level 1: If your child Level 2: If your child Level 3: If your child

Lesson Admin

System Classes Students Instructors Heat Map Acnts/Revenue CoA Trans Rpt Admin Rpts

System Program SubProg Curriculum Session Instructor Location Map Zone CoA

Add New 3 Delete

Curriculum	Curriculum Items	Description
1 White	blow bubbles listen to direction	A White swimmer can dive from the...



QuickStart Guide

- 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: White - Saturday

Display Order: 7

*Status: ON

*Sub Program: Advanced

*Curriculum: White

Session (optional): Saturday

*Location: Juniper

*Map: Juniper

*Pool Zone: Pool

*Class Start/End: 09/01/2013 - 01/01/2014

*Display starting from: 08/22/2011

*Open for Registration: 09/01/2013 12:01 AM - 12/31/2013 07:00 AM

Open for Returning Members: 09/01/2013 12:01 AM - 12/31/2013 07:00 AM

Open for New Members: 09/01/2013 12:01 AM - 12/31/2013 07:00 AM

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

*Class Length: 30 minutes

Age Limit: 0 - 0 Year(s)

Date used to calculate Age:

[Insurance/Emergency] Entry Fields: Optional

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

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

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

Prorate Class Fee: Yes

Prorate on "No Class Days": No

Charge Class Fee Monthly: No (Will charge Class Fee above on the 1st of every month)

No Class Days: 12/24/2013, 12/25/2013

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. :		10:00 AM : Josh H. :		10:00 AM : Emily H. :		
#2	8				05:30 PM : Brent J. :		10:30 AM : [Not Assign]	
#3	6		09:00 AM : Emily H. :				08:00 AM : [Not Assign]	
#4								
#5								
#6								
#7								

Save Changes to a New Class (Clone)

Go Back

Save Changes



[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 illustrate the configuration process for the Swim Lessons tab and its integration into the website design controls.

Step 1: Tabs Management
 The 'Tabs' section shows a table of system-defined tabs. The 'Swim Lessons' tab is highlighted with a blue circle 1. The table includes columns for Displaying Order, Tab Label, Type of Tab, Hide this Tab?, Access Control, and Draft this Tab?.

Step 2: Tab Edit
 The 'Tab Edit' form for 'TAB_Swim_Lessons' shows the 'Tab Label' as 'Swim Lessons', 'Hide this Tab?' set to 'NO', 'Displaying Order' as 3, and 'Access Control' as 'Everyone'. A blue circle 2 points to the 'Hide this Tab?' dropdown.

Step 3: Sub-Menus Under this Tab
 This section shows the configuration for sub-menus under the 'Swim Lessons' tab, including 'Add New' and 'Delete' buttons.

Step 4: Home Page Section Controls
 The 'Home Page Section Controls' section shows the 'Show Partners' and 'Show Events' settings. The 'Swim Lessons' tab is highlighted in the 'Tab Order' table with a blue circle 4.

Step 5: Command Button Controls
 The 'Command Button Controls' section shows the configuration for command buttons. The 'Lesson Program' button is highlighted with a blue circle 5, and its URL is shown as 'http://www.teamunify.com/SwimLessons.jsp?_tabid_=7470'.

Final View
 The final screenshot shows the website design configuration with a swimmer image and a sidebar containing buttons for 'Our Coaches', 'Lesson Program' (highlighted with a blue circle 5), 'Team News', and 'Team Calendar'.

[Management & Reporting](#)
 Tutorial

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