

 *Camp & Class Manager*

Camp & Class Manager Season Setup User Guide



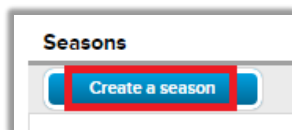
Contents

Season Setup User Guide	3
Season Setup	4
Step 1: Season	4
Step 2: Sessions	5
Step 3: Session Groups	5
Step 4: Deposits and Payment Plans	6
Step 5: Discounts	7
Step 6: Look and Feel	7
Step 7: Registration Forms	8
Registration Form	8
Electronic Waivers	8
Step 8: Confirmation Email	9
Step 9: Activation	9
Season Setup: Things to Know	9



Season Setup User Guide

To begin setting up a new season, first click blue **Create a Season** tab on the Home page



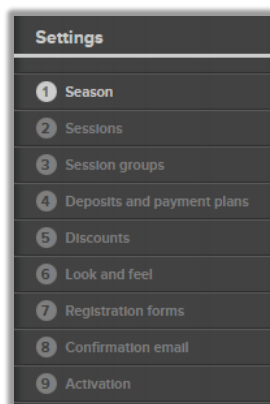
Next, you will choose how you would like to **Create a Season**

1. **Create a new season from scratch** – This option gives you a blank slate to fill in all details of new season.
2. **Copy an existing season** – This option will allow you to edit existing data in the 8 setup steps

- i. **Running the same program again** – Use this option to track year over year performance. All season dates will be moved forward by one year. Will require little to no edits.
 - ii. **Using it as a template to setup a different program** – Creates a carbon copy of the current season. All season dates will be kept the same.
- **Note:** If you selected option A, the system will automatically take you to step 1 in season setup.
 - **Note:** If you selected option B, the system will load the new season (season name will start with the word “copy”) on the Home page. Click Setup under the season name to go to step 1 in season setup.

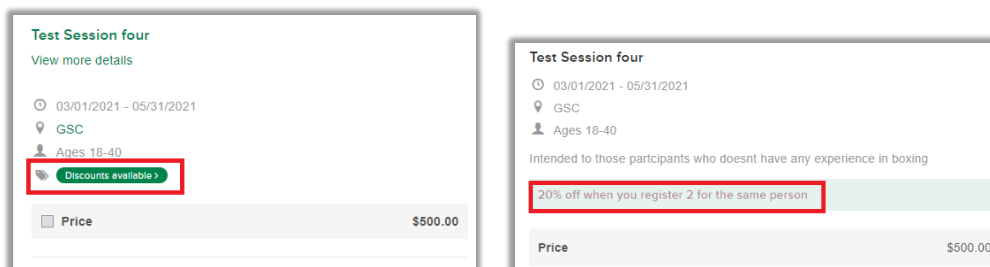


Season Setup



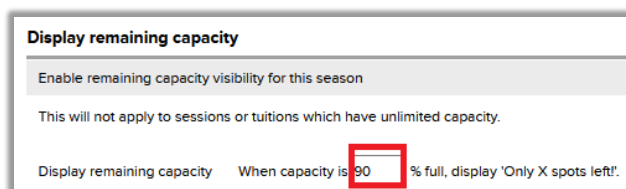
Step 1: Season

1. **Season Name**
2. **Categories** – Select categories that best describe the activities in this season
3. **Contact** – Assign a season contact for participants to contact if needed.
4. **Attendance Tracking** - Allow coaches to log and monitor participant attendance and email participants with repeated absences.
 - a. If you don't have Attendance Tracking turned on, please [contact Camp & Class Manager Support](#) and we will enable it for you. Click [here](#) for additional information.
5. **Promotion Tag Visibility** - Display discount tag, payment plan tag, or both on the session selection page.



Example of Tag

6. **Terminology** - Configure custom (change) terminology for **Merchandise**, **Participant** and **Session Type** in this season.
7. **Display Remaining Capacity** - Enable remaining capacity visibility for this season. This will not apply to sessions or tuitions which have unlimited capacity.



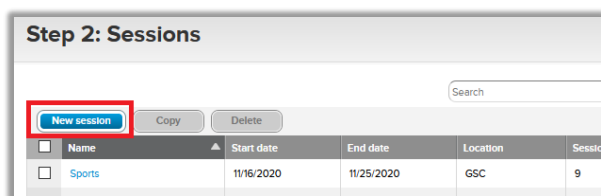
- **Note:** You can change the percent. Default percentage is 90%.



Step 2: Sessions

Provide the details for your session, including location and tuition options.

1. **Basic settings** - Define the basics of your session, including dates, location and for what participants may register.
2. **Base tuition** – If multiple tuitions are available, then registrants may choose more than one tuition. Or allow customers to select all tuitions for this session. Click [here](#) for additional information.
3. **Session options** - Optional products and services available for purchase with this session.
 - a. Click [here](#) for steps to setup.
 - b. Click [here](#) to make session option required.
 - c. Click [here](#) to allow session options to be discounted.
 - d. Click [here](#) to make session options conditional based appropriate answer to a custom questions
- **Note:** If you have **Global Session Options** created click [here](#) for steps to assign to desired session(s).
4. **Associated merchandise** - Merchandise that can be purchased in association with this session.
 - a. Click [here](#) to create a merchandise
 - b. Click [here](#) to associate merchandise
5. **Report and display settings** - Manage how this session will display to participants.
 - a. **Display Status** – Allow session(s) to display Online or Internal Only
 - b. **Session Type** - is used to categorize your sessions, it will show up on your registration page as a filter which allows registrants to easily find the session they would like to register for.
 - i. Click [here](#) to setup and manage Session Type's
 - c. **Sub-Session Type** – Example: Session Type is Sports. A Sub-Session Type can be Basketball.
 - d. **Categories**
 - i. This session uses the default categories for the season it belongs to
 - ii. This session uses custom categories different than the season default. This option will allow you to enter session specific categories.
 - e. GL code and Internal ID ½ - Is for reporting purposes.
- **Note:** Once one session is created the system will take you session list page. Click the **blue New Session** tab to create a new session.



- **Note:** For more information on creating and editing a session click [here](#).

Step 3: Session Groups

Offer registrants a group of sessions to register for at one time.



Note: To access session groups, the feature must be enabled. Please [contact Camp and Class Manager Support](#) team or your Account Manager for help getting this feature enabled.

If this feature is enabled click [here](#) for steps to setup. Below are examples of this feature during online registration.

Once this feature is turned on, it is not required. If you do not desire to use **Session Groups** click **Save and Continue** to go to the next step.

Step 4: Deposits and Payment Plans

Break up the price of camp by setting up deposits or payment plans.

1. **Deposit Amount** - Specify the minimum amount a customer needs to pay to secure their spot when registering online.
 - a. Customers must pay in full in order to check out.
 - b. Customers must pay a deposit of (specific \$ amount) of tuitions in order to check out.
 - c. Customers must pay a deposit of (specific % amount) of session tuitions in order to check out.
 - d. Customers can check out without making any payment.
 - e. Set different deposit amounts for different sessions.
 - i. Click [here](#) for additional information.
- **Note:** Deposit option available until – The selected deposit option will expire on the day after the deposit option date.
- **Note:** Click [here](#) additional information.
2. **Outstanding Balance Payment Options** - Choose how you will have customers pay their remaining balance.
 - a. **Payment plan(s) with one or several installments** – This option will allow you to setup payment plans. Click [here](#) for additional information on Payment Plans.



Installment	Due date
Initial deposit	Collected at checkout
1st installment	MM/DD/YYYY

- b. **I will collect the remaining balances myself** – This option will not implement any specific system or schedule for how balances are collected. You are responsible to collect remaining balances.

Step 5: Discounts

Membership, multi-person, and multi-session discounts will be automatically applied during registration. Custom (internal only) discounts must be explicitly added to an order by someone in your organization.

Types of Discounts

- [Multi-Person](#)
 - [Multi-session](#)
 - [Custom](#) (internal)
 - [Membership](#)
 - [Conditional](#)
- Note:** Discounts are not required. To by-pass click **Save and Continue** to go to next step.
 - Note:** Click [here](#) for a Discount Overview

Step 6: Look and Feel

Customize the appearance of the account your customers will use to manage their registrations and online registration form.

- [Change Background Image](#)
- [Customize Header](#)
- [Customize Color](#) - Customize color scheme.

Text and buttons	
Primary color	# de221f
Secondary color	# 0a8046
Button text/Tab text/Tag text	# mmm

Shopping cart header	
Background	# 333333
Text	# mmm



- **Note:** To keep default selections for **Look and Feel** and continue to next step click **Save and Continue**.

Step 7: Registration Forms

1. **Online Registration Form and Waivers** - Information required to complete initial registration.

Registration Form

- i. **Participant questions** - These are the questions that will be asked about people being registered.
- ii. **Parent questions** - These are the questions that will be asked of the person entering the registration.

Note: If participant is 18+ years old the system will not display Parent/Guardian questions.

Note: Click [here](#) for more information on setting up registration questions.

Electronic Waivers

Electronic waivers are best used when you want to quickly collect permission for something, such as a liability waiver or permission to take pictures/video of a participant.

- **Note:** Click [here](#) for steps to setup an **Electronic Waiver**.

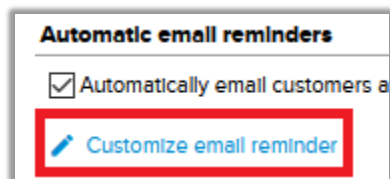
2. **Participant Photo and Supplemental Forms**

- a. **Participant Photos** - Require registrants to upload a photo from their Online Account.
- b. **Supplemental Forms** - Information you're comfortable collecting after registration.
 - i. **Supplemental Form** - A document you would like registrants to upload in their online account.
 - ii. **Follow-Up Form** - An online form filled out in the online account.

Note: Click [here](#) for steps to setup up a Supplemental Form or a Follow-Up Form

- c. **Automatic Email Reminders** - Automatically email customers a reminder to complete forms before their first session.
 - i. System will prompt you to enter up to 4 different dates to send an email reminder.

Note: You can customize what your email reminder says by clicking **Customize Email Reminder** blue link.



- d. **Questionnaire** - Information that you collect prior to marking attendance.

- **Note:** Click [here](#) for more information on setting up a **Questionnaire**.



Step 8: Confirmation Email

1. [Confirmation Email](#) - Customize the email registrants automatically receive when they register.
2. [Reminder Email](#) - Send this email 24 hours after the prospective registrant abandons their cart.
Focus on marketing to encourage the customer to come back and register for the event.
 - a. The Cart Abandonment feature must be enabled. [Contact Camp and Class Manager Support](#) to turn it on.

Note: Check *Send me a copy of every registration email box* and enter up to 5 email addresses to receive a copy of each **Confirmation Email**.

Step 9: Activation

Take some time to review your registration and payment settings before scheduling when to open registration.

1. **Test Your Online Registration** - Before you open registration, carefully look everything over to make sure it's working as you intended.
2. **Confirm Your Payment Information** - Confirm your payment information is correct to avoid delays in receiving payments
3. **Schedule When You Want Registration to Open** - Open registration right away or schedule it to open in the future.
 - **Note:** When selecting **On a later date**, clicking **Activate** will not open registration until the scheduled date. Registrants will see the event on the registration page with the date that it opens.

Season Setup: Things to Know

1. [See a Preview](#) - Before you activate your season, preview the registration form. Preview shows you what your customers will see and can be used to audit your season.
2. Remove listing from Active.com/ActiveKids.com - Allow or disallow programs to be Published on active.com or activekids.com.
 - a. To remove listings from mentioned websites above [Contact Camp and Class Manager Support](#) for assistance.
3. Save and finish Season Setup Later – You can always save information and return and complete season setup later.