Compudance Online Helpdesk

1 — Last update: 2018/06/22

compudance

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Welcome to / Contact Us

Customer support is our top priority.

If you have any questions or just need to clarify, contact us via email or give us a call…

Email	Phone
info@compuacademy.net	1-888-339-1286

Our typical business hours are Monday through Friday 9 am to 5 pm Eastern time.
We do schedule appointments outside of these hours at request.

Please use the Search option in the top right corner of this manual to quickly find your answers.
If you need further assistance or clarification create a support ticket, click here

System Update Release Announcements

We will publish any of our Update Announcements here if you wish to read them.

Release Date	Description
3/26/2018	Enter Deposit From Family Account
3/7/2018	Filters for Text Messaging
12/12/2017	New Family Invoices with Partial Payments
11/21/2017	Admin Autopay Control , Parent Autopay Control and Partial Pament Available in Parent Portal
7/13/2017	New Invoice Note field and Revised Add Student Form
5/10/2017	New Release of Website/ Parent Portal
4/4/2017	Family Invoices Screen now shows Deposits Available
3/8/2017	Update Family Link Contact info
3/1/2017	Student List has Invoice link
3/1/2017	Student List shows Balance, student Detail Tab of Open Invoices, Family Invoice list shows Family Balance
2/21/2017	Age Groups for Classes, Admin Organization of Tabs
2/16/2017	Express Mail Box, Payment Gateway Options

2/16/2017-Update

System Update Release February 16, 2017

Express Mail Sent Mailbox

We have updated the Sent message list to now display each email address individually so you can search by the email address, subject and date sent. The system will retain all Express Email Messages you send for the past two months.
To see details, please click this link to our manual. Express Sent MailBox

Payment Gateway Options

If your school uses the **Payment Processor Integration** you now have options to ***what time*** the auto-payment scheduler will begin for your school.
The school is also able to make a payment account on file required during the online registration process or allow the parent to Skip the entry.
To see details in the manual on how to set your gateway, please click Gateway.
To find out how the Auto-pay works in the system, please click Auto-payment.

2/21/2017-Update

System Update Release February 21, 2017

New Class Field

We have created a new class category field so you can designate the age group of the class.
Each school has the ability to set the ages any way you wish.
You will set up your age categories by going to Admin-> School Setting Types-> Class Ages.

Right now everyone has a category called **All Ages** and all of your classes are set to this category.

This category will be used for a future feature where you will be able to display your schedule to your website through an API, if you wish.

To see how to create your age groups, see” Add Age Groups”:#add-age-groups

Admin Organization!

We moved a few tabs in the Admin section to make it easier to find things!
*
School Setting Types Section* will now have; **Class Types, Alert Types, Medical / Questions, Income Categories, Age Groups and School Groups tabs.**

The **Costume Company Size charts** have been moved to the Address Section. This tab is hardly used and is there just so you can see the girth ranges from each manufacturer for each size.

The Address Section is also where the school mailing address is found if it is used in an alert for invoices or statements.

3/1/2017-Update

System Update Release March 1, 2017

Student list now shows Student Open Balance Column

The Student list will now have a column to the right showing the student's open invoice balance. This balance will be for all open invoices regardless of the season they are created.

New Student Detail tab – Student Open Invoices

When you click the plus for the Student you will now have a new tab that displays the current open invoices for this student. You can click on Pay and will be brought to the Families Invoices so that you may receive a payment for any of family members.
See a quick video on how it works:

View/Pay Family Invoices list shows the Family Balance

The Billing section View/Pay Family Invoices list now shows the Family Balance in the right side column. This will be for all open invoices regardless of due date for all students in the family. To see the details of these invoices, just click the plus and view open invoices.

3/2/2017-Update

System Update Release March 2, 2017

Student list now has a Create Invoice Link
In your Active Student List (Student), you now have an Invoice link in front of each student.
When you click it, it will automatically bring you to Create an Invoice for that student.

Here is a video on how it works:

3/8/2017-Update

System Update Release March 8, 2017

Updating Email addresses for Entire Family
Now, when you go to the family link, edit a family, change the email address or mailing address information, the system will ask you if you want the new information to be updated for the members of the family. If so, it will change them at that time.

Here to see a video on how it works:

4/4/2017-Update

Family Invoices Screen now shows Deposits Available

When you go to Billing-View Pay Family Invoices, you now see a Deposits column so you can see who has a deposit available. You can also sort by this column. The deposit available families will also be colored pink.

Export to PDF | Export to XLS | Export to XLSX | Export to RTF | Export to CSV

School Family Account

	#	Family Id	Family Name	First Nam	LastName	Address 1	Address 2	City	State	Zip Code	Deposit	Balance
		27050	Moss	Karen	Moss	134 Main St		Tenafly	New Jersey	07670	110.00	285.60
		61366	smith	jen	smith	1 here	2 there	town	Nebraska	35645		
		60711	testflag4	testflag4	testflag4	testflag4		testflag4	Alabama	12345		
		59910	Paul	Janet	Paul	85 Smith Ave		St. Me	Tennessee	44455		
		59907	Smith	Dan	Smith	965 main		mytown	Nebraska	11223		
		59582	Morris	Beth	Morris	12 Mainstree		River	New Jersey	08765		84.00
		59574	Parent2	Parent1	Parent2	7W CLINTON AVE		BERGENF	New Jersey	07621		
		57461	Smith	Sally	Smith	1 street road		Philadelph	Pennsylva	19150		588.00

To sort by a column just click on the column header. To sort in descending order click on the column header a second time.

5/10/2017 – New Release of Website/Parent Portal

We are excited to announce the release of....

New Parent Portal

E-Bulletin Board

New CompuDance website!

OUR FRESH NEW SOFTWARE HAS PEOPLE TALKING

Check out our new website at
www.compudance.com
Contact us by email or phone with any questions

INFO@COMPUACADEMY.NET 888-248-3679 WWW.COMPUDANCE.COM

For More Information

New Parent Portal – Here is the manual the Parents get. You can also login as a parent to check it out!

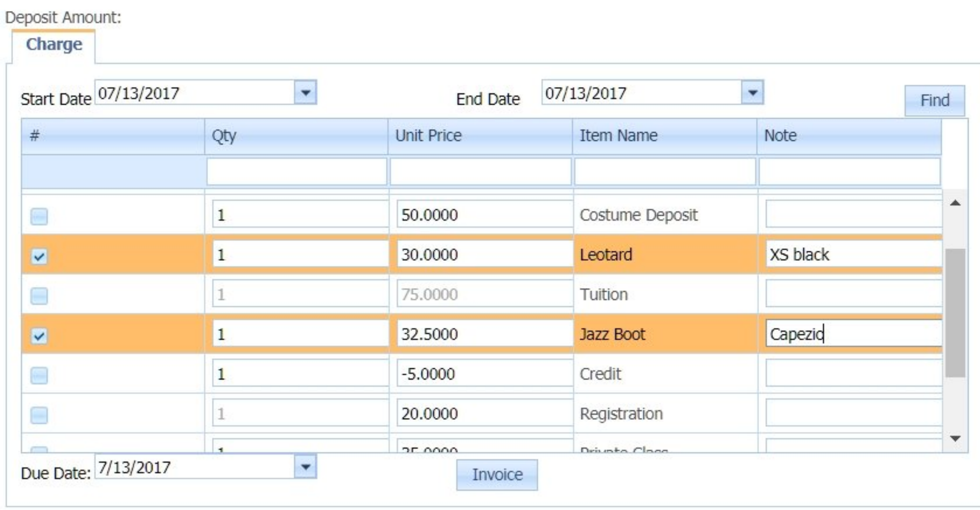
How to post on the Bulletin Board for your parents to see your posts. Click Here for the Manual page.

Can't see our New Website. (You may have the old one in cache.)

7/13/17- Update

System Update Release July 13, 2017

Add a Note when invoicing!
When you create an individual invoice, you now have the option to add a note for a specific category charge. The note will be included with the income category in all invoices and statements. After your feedback we do plan to give you this feature in batch invoicing.



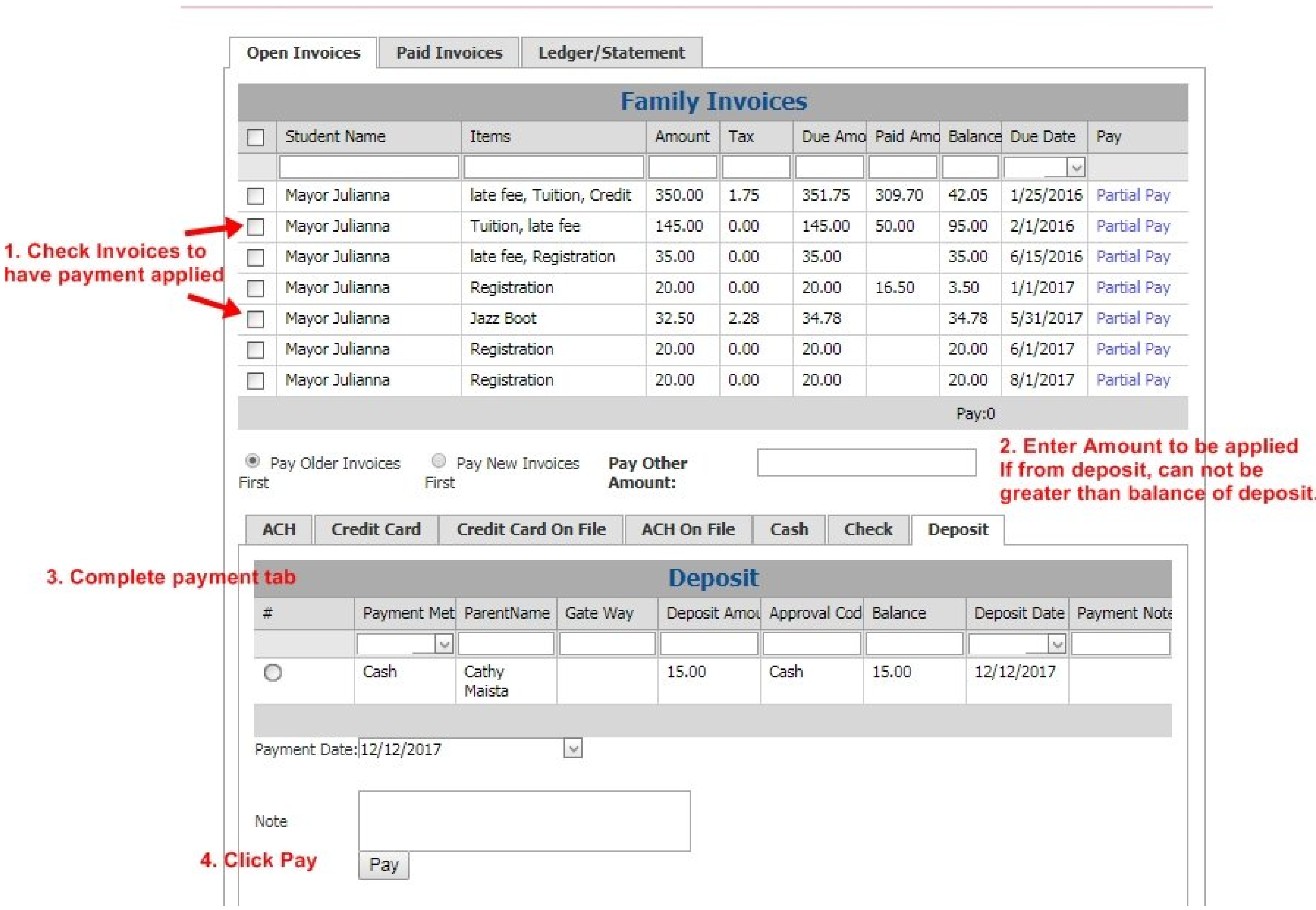
We have updated the Add a New Student form.
It will allow you to add siblings to existing families with the same email address. The add a sibling button will be removed next week.

New Family Invoices Window with Partial Payments

New View/Pay Family Invoices with Partial Payments

You can now set the amount to be applied to invoices in the billing-View/Pay Family Invoices screen.

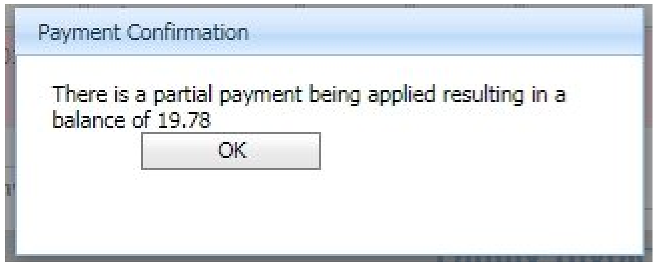
To turn on this feature, go to Admin-Gateway tab.
Click Edit on the Gateway line.
There is a checkbox on the bottom left side saying Show Admin Partial Payment Text
Check it if you want this feature. Then click Update.



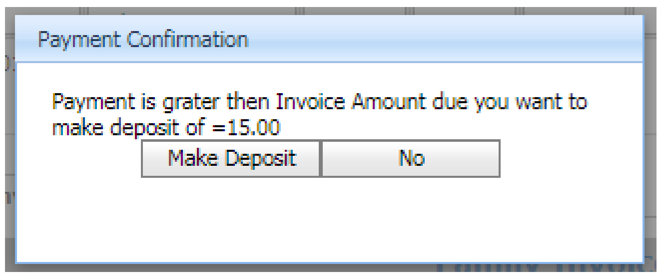
To use, if you are receiving a payment other than the total Pay of the invoices checked, you can enter this amount in the Pay Other Amount box.
Select how you want the partial payment determined. (It defaults to pay the older due date invoices first of the invoices selected.)
Enter the payment information and click pay.

! If you are paying from a deposit, you enter the balance of the deposit in the other amount box to apply it to sibling invoices.

- If the amount entered is less than the total balance of the invoices selected, you will see the following message.

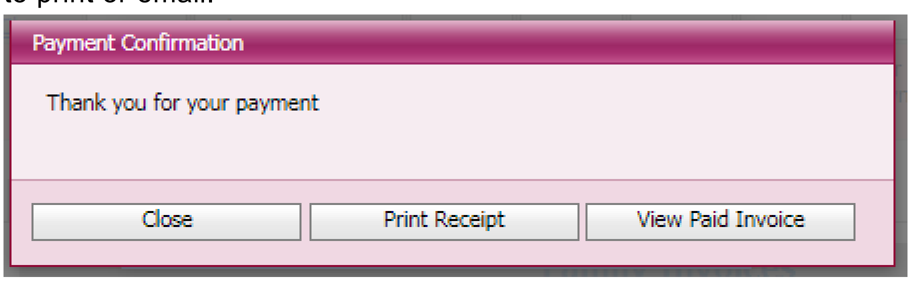


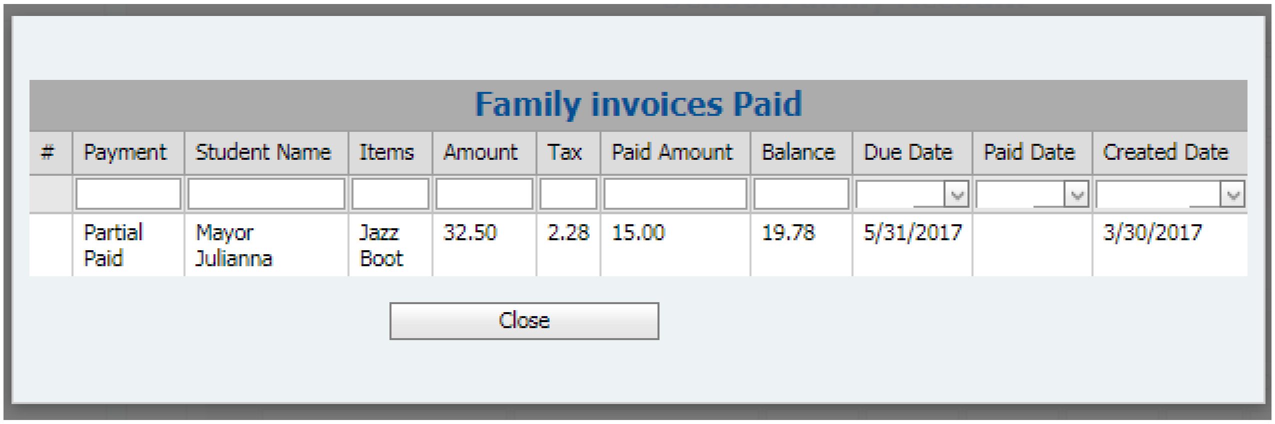
- If you enter an amount greater than the balance of the invoices, it will ask if you want the overage to create a deposit.



If you answer no to making a deposit, the system will bring you back to the invoice list. No payment has been made.

- You are given an option to View the payments applied after the amount is processed. You may also create a receipt to print or email.



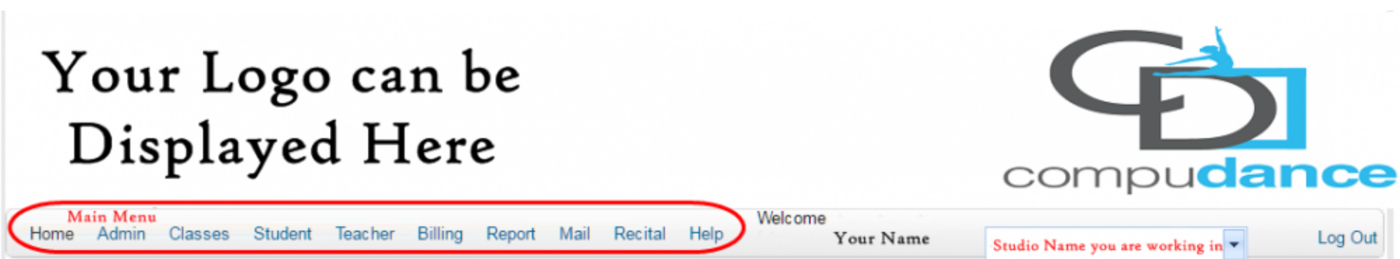


✻ You may still use the partial pay option if you wish to determine how payment is applied to invoices with multiple charges.

Navigating the System

Thank you for Choosing CompuDance.

To begin, we would like to stress how important your web browser is.
Some browsers will not allow particular functions to complete. They may also display the screens incorrectly.
Since Google Chrome is a free download on any device we have designed our software to work with this browser.
We have also Approved use of Microsoft Edge for Windows 10 and FireFox



When you look at our system you should see your Studio logo, a Welcome message to the user and a drop down option for the School you are in.

If you have multiple school databases, you can just switch between them using the school drop down.

The **Main Menu** is under your Studio Logo.
You can select the section you wish to go to at anytime. Some of the data is represented under multiple section but in a different view.

If you see the **Plus sign** or you can click it to see more details about the item that it is in front of.
If you see the word **Edit** , you may click it to edit the main data that is displayed in most tables.

Filter Boxes
When you see a row of blank boxes, these are called filter boxes. They are not for data entry.

You may filter the data displayed below by entering in search criteria in that column’s filter box. The system will only display data that matches the entered search criteria.

Sort the data

You can sort the data displayed by clicking the column header that you want to sort by. If you click it once, it will sort acsending. If you click it again it will sort descending.

Export Tabs

Many tables and reports through the system allow you to Export the data to utilize outside of the system. You can Export to:

PDF – For printing/save only. You are not able to edit or change format.

XLS (excel worksheet) – You can edit the spreadsheet. If you grouped the data, the group will still exist in the download.

XLSX (newer version of excel) – You can edit the spreadsheet. If you grouped the data, the group will still exist in the download.

RTF (rich text format) – This is used for importing into word processing or another database.

CSV (comma separated value) – This is used for importing into word processing or another database.

> XLS is probably the easiest to work with after the export. Easier to see the data in columns, can perform functions.

Add buttons

Most areas have an Add button in the top right corner. When you click the Add button, you will see a form open to create a new item for the data table you are viewing.

Update or **Cancel**

When you see a data entry form- you either hit an Add button or Edit. After you enter or edit the data in the form, you must chose to Update the form to Save the changes or *Cancel to not save* the changes entered.

Grouping Reports

In some data lists you will see a row above the column headers stating “Drag a column header here to group by that column”

This means that you can group the data by any column you wish.

*To Group. *

Click on the column header you want to group by.

Hold down the click and drag your pointer up to the row that says,“Drag a column header here to group by that column”.

You should see a ghost of the column header move with your mouse pointer. Let go of the click button when the ghost columnis in that row.

The data should instantly become one row for each change in data for the column header selected.

Typically you will see a plus sign to see the details for the group.

Examples when to Group

You will need to group the **Family Ledger Report** either by Family Name or Student Name prior to sending out statements. You group by Family Name to send Family Statements. You group by Student Name to send Student Statements. You may also decide to group this report for other reasons. Maybe you want to see how certain payments were applied for a particular family. In order to do so, enter the date range the payment was made to the date applied or today. Then group by the Payment Information column.

Main Menu

Main Menu Options

Home – will bring you to the Calendar page. You are able to search for a specific class, teacher, student or room calendar. You can go to this page to Schedule an individual Date Class.

Admin – This section allows you to set master data in one section that is used throughout the database. If you edit something in this section it will instantly be reflected in all of the other areas. You are able to set: Users , School Seasons, Payment Gateway information, School Setting types including class types, income categories and alerts. School Address and School Groups.

Classes – This section will show you data based on a Class. You can create a class, schedule it, enroll students, see who is enrolled, assign teachers, see the schedule dates, enter class measurements for the students, see the autosizing for the class by manufacturer.

Student – This section will show you all the data relative to a student. You can edit any of the information displayed or click the plus the detail tabs for enrolled classes, add classes, class history, guardian information, address, more phone numbers, more email addresses, measurements, notes from the studio for the student and school questions.

Teacher – This section will show you all the data relative to a teacher. You can edit any of the information displayed or click the plus to see the detail tabs. The tabs include assigned classes, unassigned classes-so you can assign them, address, phone and email information.

Billing – This section contains all of the accounts receivable and reports.

Report – This sections lets you create all of the non-billing reports.

Mail – This is where you can create emails and text messages. You can also see the Sent log from your Express Messaging.

Recital – This section will help you organize your recital productions.

Help – You already found it! This manual is accessed by clicking Help.

Tip! If the manual did not open in a new window, you can use the back arrow to return to the system. Then right click on help and select open in a new window. This way you can reference the manual as you use the system.

Grouping Reports

Grouping Reports
In some reports you will see a row above the column headers stating “Drag a column header here to group by that column”
This means that you can group the data by any column you wish.

To Group
1. Click on the column header you want to group by.
2. Hold down the click and drag your pointer up to the row that says,*“Drag a column header here to group by that column”*.

You should see a ghost of the column header move with your mouse pointer. Let go of the click button once the ghost column header is in that row.
The data should instantly become one row for each change in data for the column header selected.
Typically you will see a plus sign to see the details for the group.

Admin Setup

To begin setup, you will need to:

Add Season	Seasons are a way of organizing your classes within the school year.
Add Class Types	Class types are used to define the class genres
Add Venue	Venues are used to define the classroom names
Add Income Categories	Income Categories are items that can be charged to students

User login access

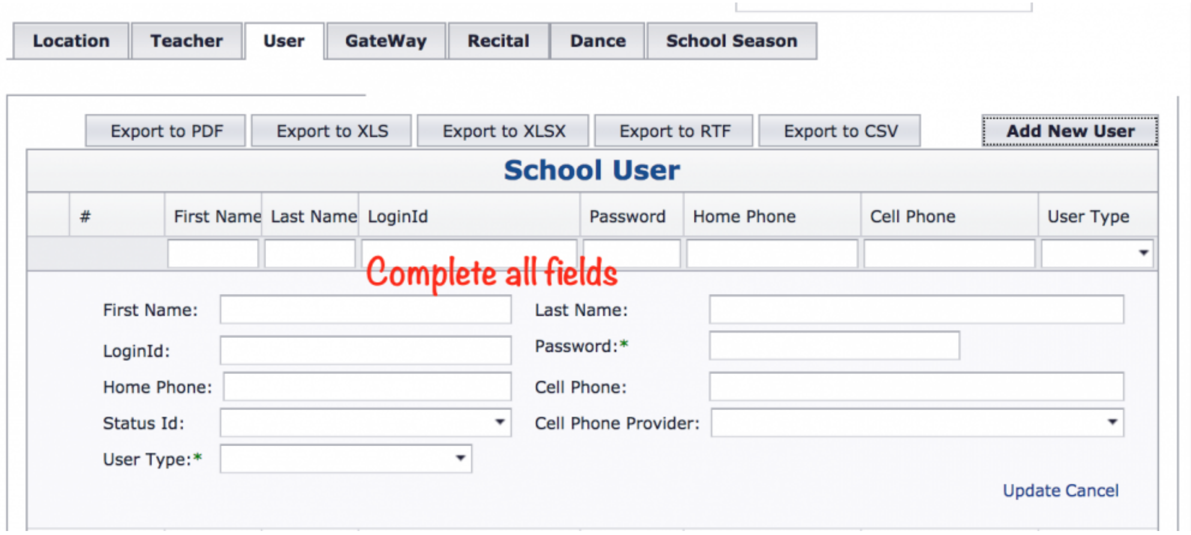
User ID are the logins for your particular database.
There are different User ID types that determine the parts of the system a user has access to.

USER TYPE	SYSTEM ACCESS
ADMIN	can access all parts of the system except teacher and parent portals
STAFF	Has limited system access. Can not view totals on any billing reports or screens
TEACHER	Only allows them access to teacher portal
PARENT	Only allows them access to the parent portal

Only a ADMIN or STAFF level users can create or edit login IDs
(Staff can not edit an Admin user)

To create a new USER:
Go to ADMIN Menu and select USER tab.

Enter in the data and hit update to save USER



Login ID – is the user's email address. It must be unique in the system, meaning there can't be any other users with the same email.

Password – Must be entered upon setup. The password must contain a minimum of 6 characters and contain 1 (or more) capitals and 1 (or more) special characters and 1 (or more) numbers. For example: PassWord#1

> If the system is creating the login via online registration- the Default Password is currently **Dance#16**

Once the password is saved the first time, It can not be modified in this tab.
If it needs to be reset, that would have to be completed through the Forgot Password option from the Compudance webpage.

Cell phone number – This number is necessary to use the Forgot Password option.

Cell phone provider – In order for the user to get text/sms messages, the provider needs to be selected. If you do not no the provider or text messages are not wanted, select "Not Applicable"

Status – for users to be able to login, set status to Active. At any time a user can be made inactive which would block them from being able to login or reset a password.

User Type – defines the users level of access to the system.

Teachers and parents need to be linked to the school and to the person they can access.

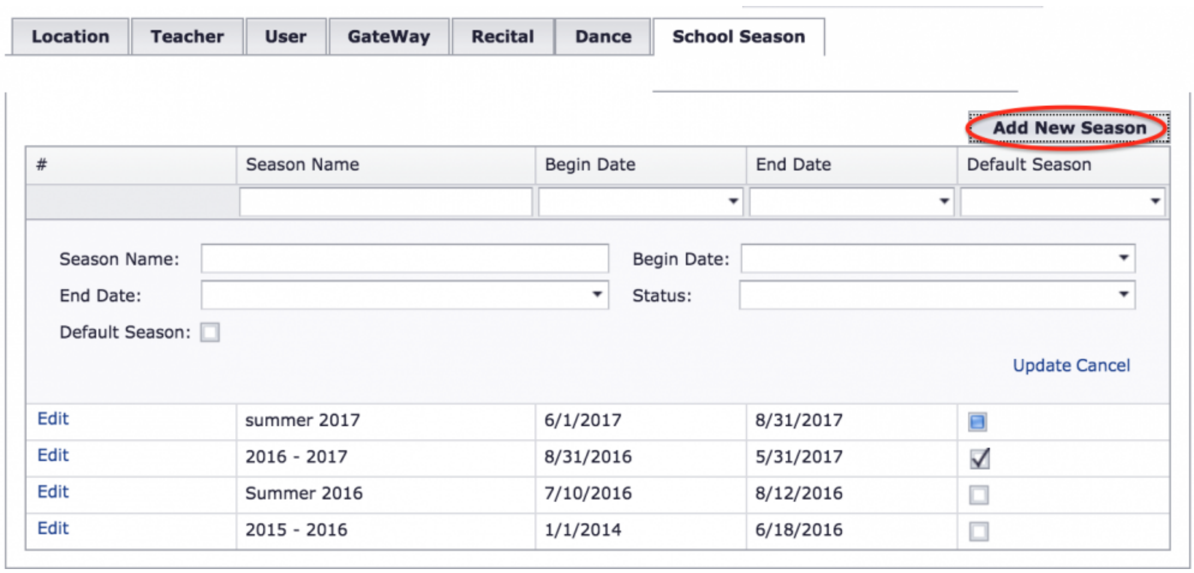
Click the ⊞ plus to see these link tabs.
The first tab will display the teachers if your user is a teacher or the students if your user is a parent.
For parents you can search which students the user is currently linked to by entering Active in the status filter box.
If you need to link the parent to a different student, check the box on the right of the student's name and click Link.

> If you have more than 1 school, the student list displayed will be the student list you are currently accessing. If you wish to give a parent permission to see students in a different school you must select the other school at the top of your screen next to the welcome message.

The second tab is for the school. If you have more than 1 school, you can give a parent or teacher access to any of the schools as needed.

School Season

Classes are organized by seasons. This allows studios to have open enrollment in multiple seasons at the same time.
Seasons are defined by the studio in the admin section. Go to ADMIN -> SEASON TAB



#	Season Name	Begin Date	End Date	Default Season
Edit	summer 2017	6/1/2017	8/31/2017	
Edit	2016 - 2017	8/31/2016	5/31/2017	✓
Edit	Summer 2016	7/10/2016	8/12/2016	
Edit	2015 - 2016	1/1/2014	6/18/2016	

- Click Add New Season Button
- Name of season – This is determined by the studio
- Begin Date – **First day of classes** for the season
- End Date – **Last day of classes** for the season
- Status Options
  Active – indicates season is Open for enrollment by studio and parents if offered.
  Do not show – season classes can be enrolled by studio only, not parents. (use when setting up the season)
  Inactive – previous season or a season that is no longer in use.

- Default – when checked, the season name, start and end dates will be auto-populated in other parts of the system. For example, on the class screens.

> Typically the **Default Season** is the current season being worked in. If you are creating your class offerings for a future season you may wish to mark that season as the default so that it will automatically assume this season and dates when scheduling. You can then switch it back to the current season when complete.

! Start and End dates cannot cross into another season’s dates.

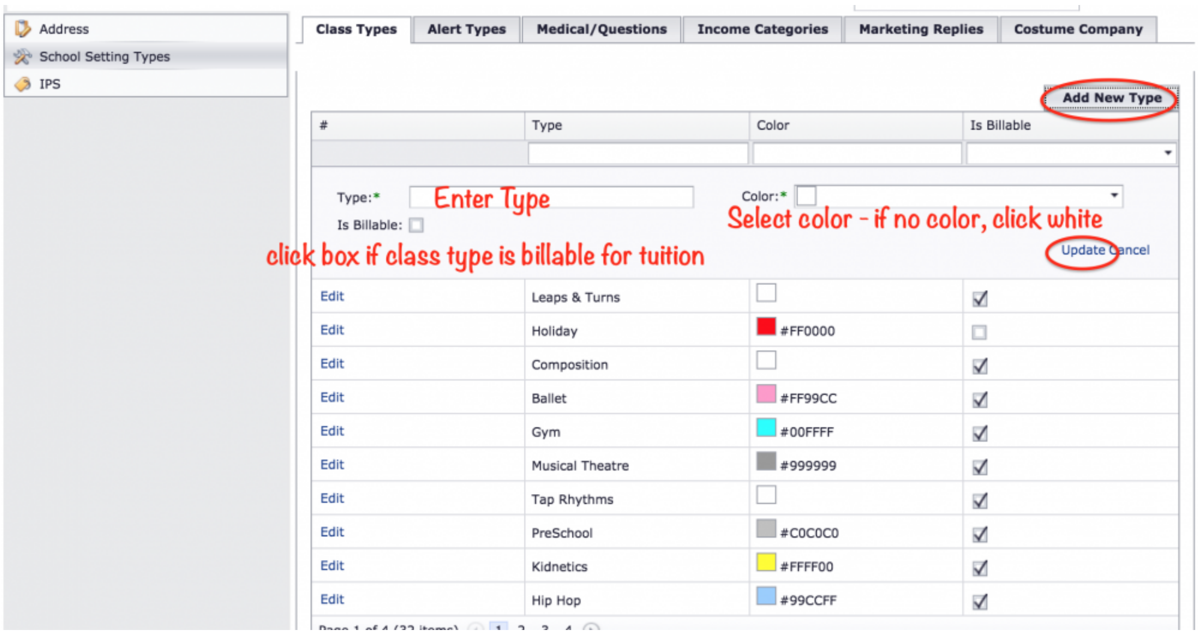
End of Season

After a season is complete, you may Edit it to have the status of Inactive.
This will make all enrollments for that season be ended as of the season end date.
All students will now show these classes in the Drop class history tab.

You will still be able to Email Students based on this season enrollment.

Class Types

Class Types are used to organize classes by genres (for example Ballet, Jazz). You may have as many as you like.



To create a class type:

Click ADD NEW TYPE button and complete the fields

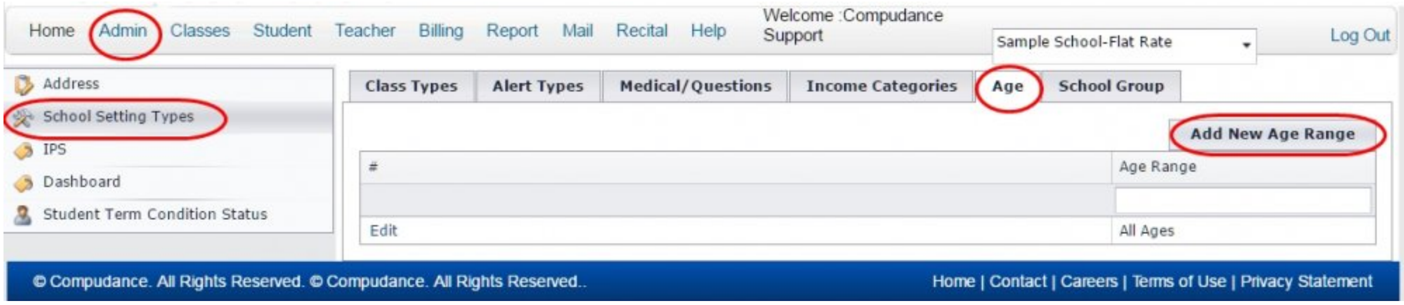
- Fill in the type
- Select a color – this color is mandatory but does not display anywhere in the system. You may select white or anything else.
- Billable check box – this is to indicate if the class type should be included when the system calculates tuition. This only applies to studios that calculate tuition based on a calculation by the system.
  Hit update to save changes

You may Edit the class types already created by clicking Edit.

Age Groups

Each class can now be set as a specific age group.
You will be able to set these age groups for your school.

Go to Admin-> School Setting Types – > Ages



To add a new group CLick Add New Age Range.
You will be typing in the ranges how ever you wish.
These ranges will be shown to your parents if you use the online registration.
They will also be used for a future release of an API option where your schedule can be shown directly on your school website.

Income Categories

Your system will come pre-set with “Tuition and Registration”. Do not change the Tuition category and do not add monthly tuition categories such as “Sep Tuition” or “Oct Tuition” etc. A “General Tuition Category” is used for “Tuition” and “Billing” is done by time interval date range.

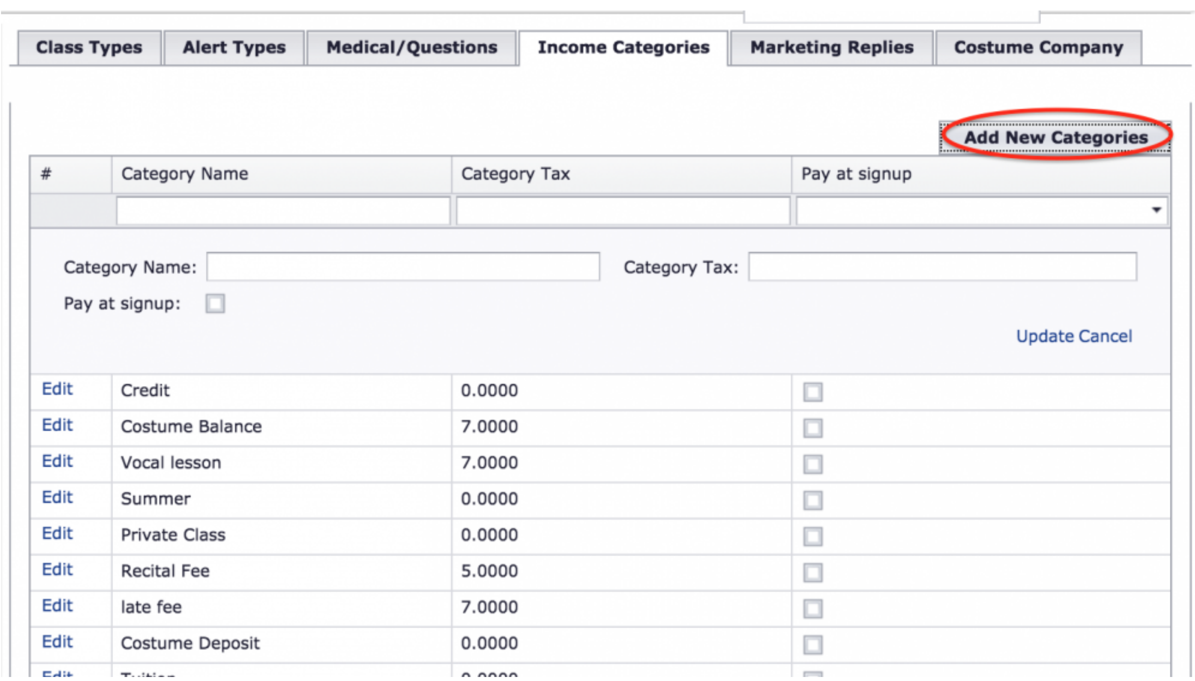
To create a new category:

- Click on Add New Button

- Enter in Income Category name

- If the category is taxable – enter the Tax percentage in the Category tax – (ex. Enter as 7.00 for 7%)

- **Pay at Signup** refers an automatic invoice being generated when a new student is added to the system. If you want an Invoice to be Auto-generated for a category such as Registration you would click the box Pay at Sign Up. All categories selected as Pay at Sign up will generate for each student added if added by the studio or through the online registration. This invoice will be created prior to class enrollments so it will be there when a parent logs in the first time.



✻ Categories can be as specific or generic as you'd like. For example, you can have a generic Dancewear category or you can break it down to Dance wear – Shoes, Dancewear – Tights. You decide how you detailed you want to be. If you wish to group your individual income categories together you can start them in the same manner with a code or number. *For example: Costume-Ballet, Costume-Jazz or 5-Ballet Shoes, 5-Jazz Shoes*

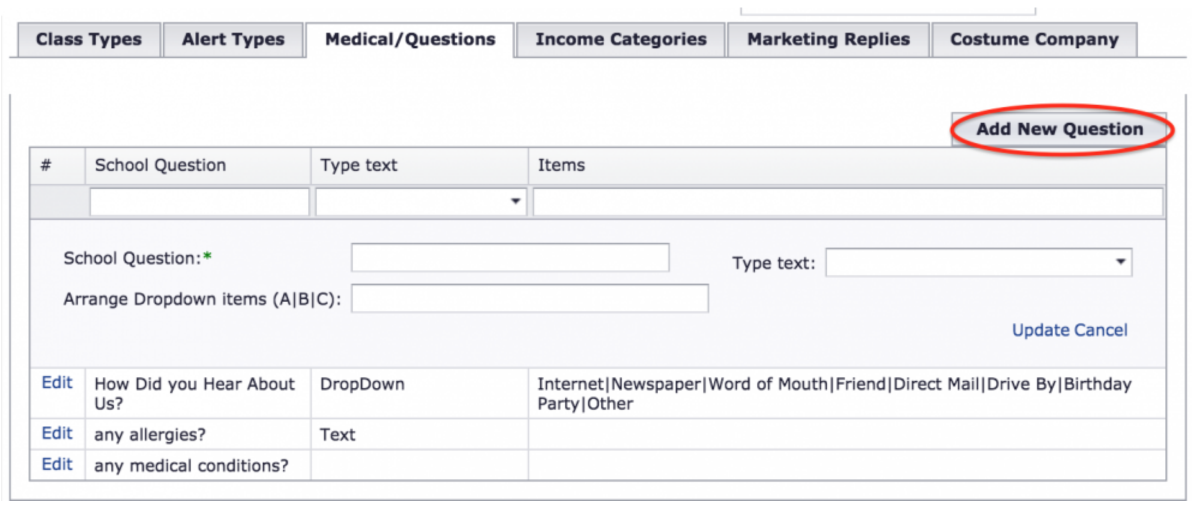
Once the category is created, the original default price needs to be entered from the Billing section. tab Income Category Price.

! Once a category is created and billed on an invoice, it is suggested you do not change it. If you change the name, it will change across all invoices already billed with that category. Changing or removing a tax rate will not change previously invoiced items, but will come into effect when new invoices are made.

Medical / Questions

Medical/School Questions allow studios to request information to be collected from their students.
The studio can create any medical or other questions they deem necessary.
They are created at the ADMIN level and appear on a tab for each student.

To create questions:
Go to ADMIN<School Setting Types<Medical Question Tab
Click Add New Question button



Enter the question – this is how it will appear on the School Question tab on student records.
Type Text – this defines the type of answer you want – there are 3 options:

- TEXT – if you would like open-ended answers where the user can type in anything
- CHECKBOX – This allows the user to click a checkbox
- DROPDOWN – This allows the studio to define the possible answers to the question. If this option is selected, the answers are defined in the field below. Enter the possible answers using the character | to separate answers. For Example, Yes|No.

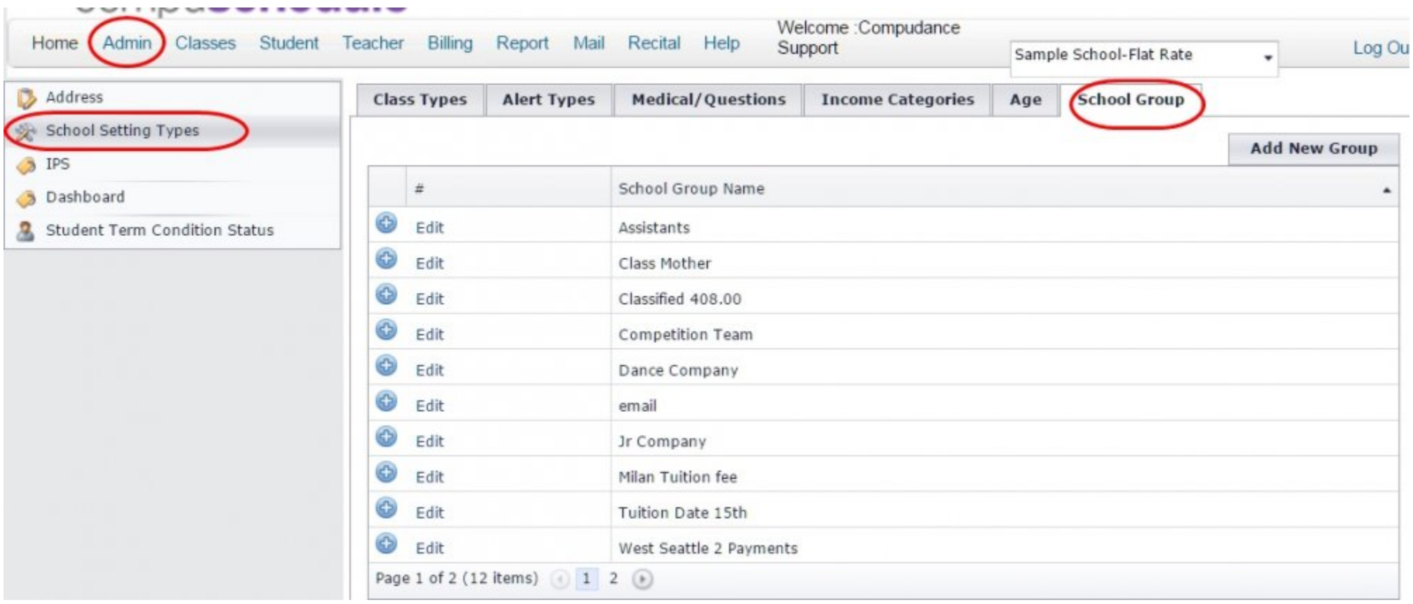
> ✻ If you wish to display the questions in a specific order, you may number the question. The online registration will display them in numeric-alphabetical order

To see the results of the questions and answers on each student, run the **School Question Report.**

School Groups

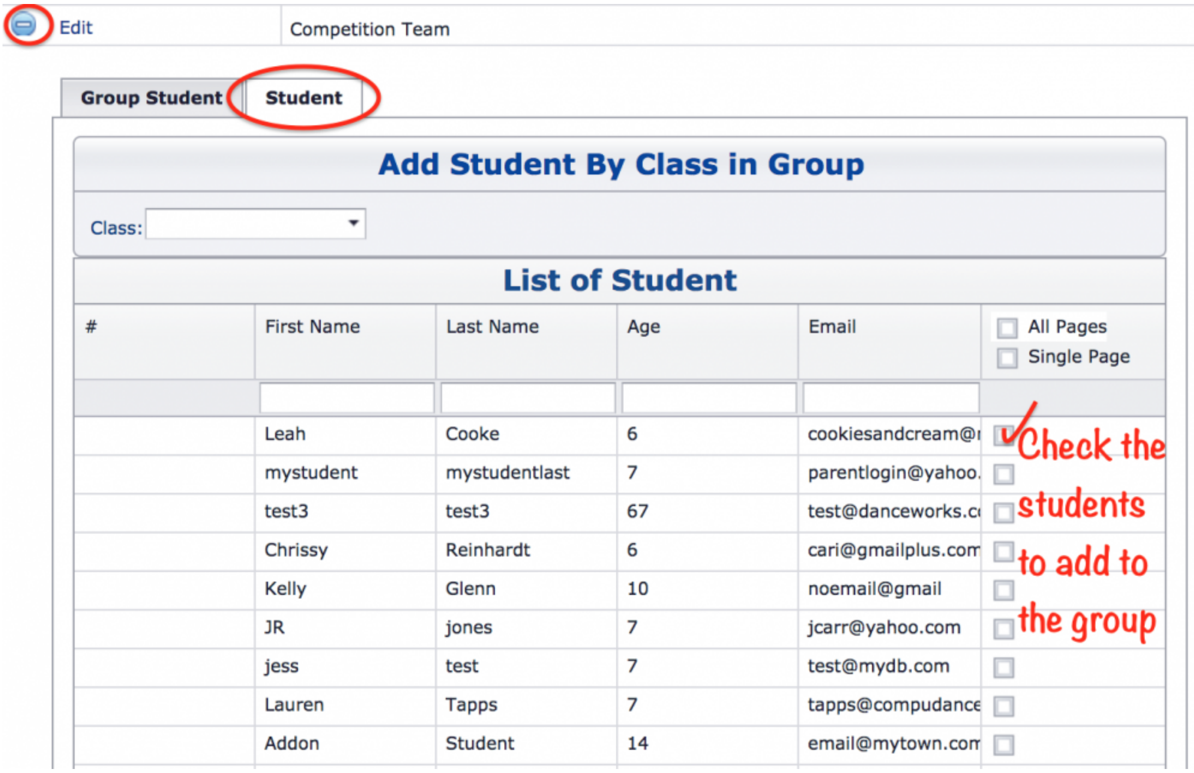
Groups are used to create a smaller subset of students. The subset can then be used in billing and email blasts. In general, you would create a group when you want to target a students for a specific reason. For example, competition teams. By making a group for competition teams, you can direct emails that pertain only to them. Likewise, you can batch bill them for specific items such as competition fees.

To create a group go to ADMIN Menu and select School Setting Types from left side menu. Select the School Groups tab. Click Add New Group button.



h3.To add students to a group
Click the plus sign on the group and go to the Student Tab (2nd tab).
A list of all students will be displayed.
Click the checkbox on those to be included in the group.

Click Add button

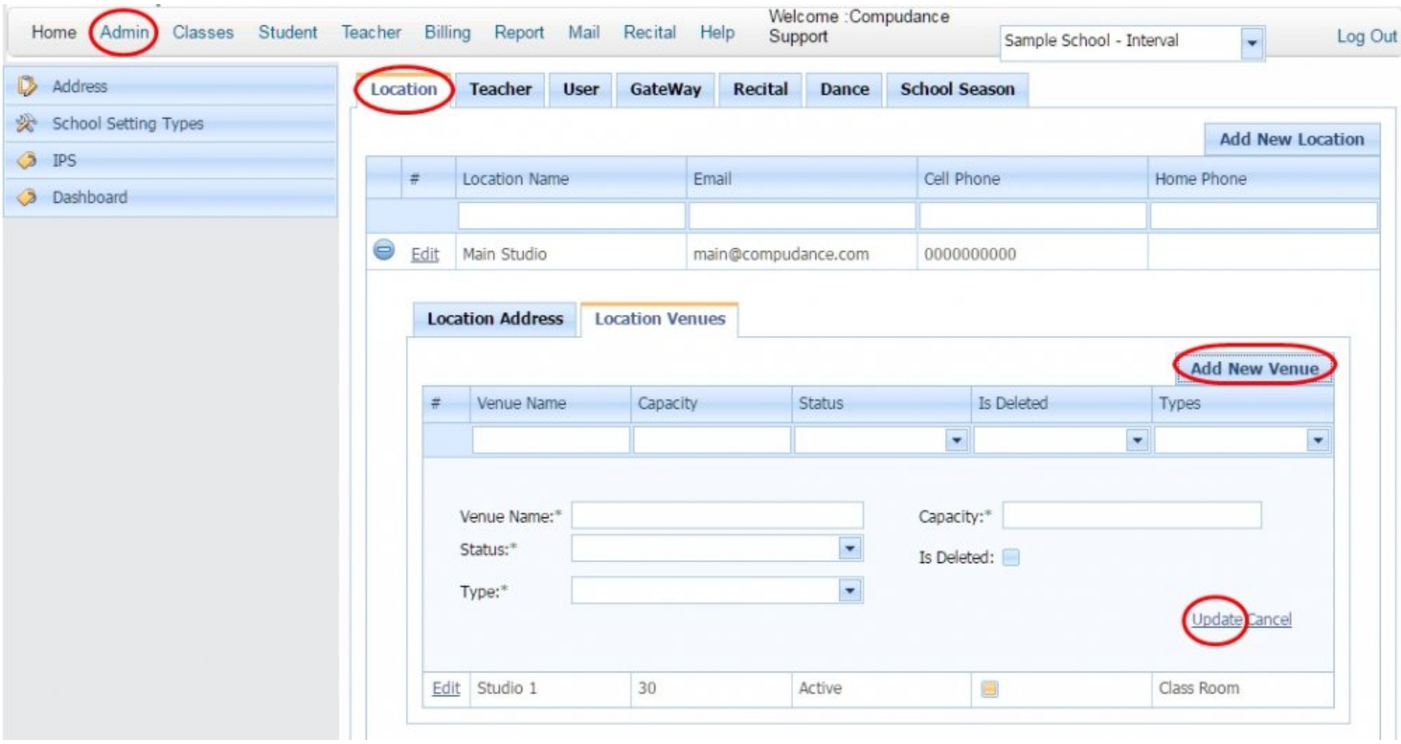


To remove a student from a group
Go to Admin-School Setting Types- School Group tab
Click the plus in front of the group you wish to see the details for.
The first tab lists all students currently in the group.
To remove one, click Drop on the student's line.

Venue / Room Names

The Venues are the rooms the classes will take place in.
By listing your specific areas, you will be able to clarify your room availability.

To add a new venue or change its settings, go to Admin->Location tab. Click Then the second tab is Location Venue.



Enter the information for the new Venue by clicking Add Venue button.
Edit an existing venue by clicking Edit in front of the listing.

Make sure you click Update to Save.

Alerts / Message Templates

Admin-School Setting Types- Alert Types is where the Admin user will go to make changes to the templates used to build messages to the client.

You may customize the appearance of how information is displayed by clicking Edit in front of the alert. After changes are made, click Update to save.

Event Name	Description	When Called	Warnings
SchoolTerms	This is what is displayed when the school's terms and conditions are displayed to the parent/customer	Displayed in Initial Online Registration, First time login to the Parent Portal and from School Terms link in the portal	Please leave CompuDance Terms at the bottom which explains our confidentiality of the data and security of financial information.
SignUpPassword	This is the email template of the initial communication from the school to the customer after online registration.	Email sent after a student/ students are registered.	Do not change [text] in the alert. It will be populated from the system when triggered.
DefaultPrintInvoice	This is the layout of the Actual Invoice. An invoice is a final charge create at once with one due date for a student.	This is displayed or emailed as one invoice per page/email from the View/Pay Invoices	There is html code embedded to page break when printing, contact us if the page break is not working. **Most schools will use statements instead.** Any field in [brackets] will be populated for specific data for that invoice. Compudance can help format if you need assistance.
FamilyInvoice	This is the Statement template. You may customize the header only.	It is used when Printing or Emailing statements from the Family Ledger Report page or you can make it individually in View/Pay Family Invoices from the Ledger/Statement tab.	You will need to supply the dates Invoices paid from and Invoices due until in order to create the statement. Do not remove the [bracket fields] in the alert.

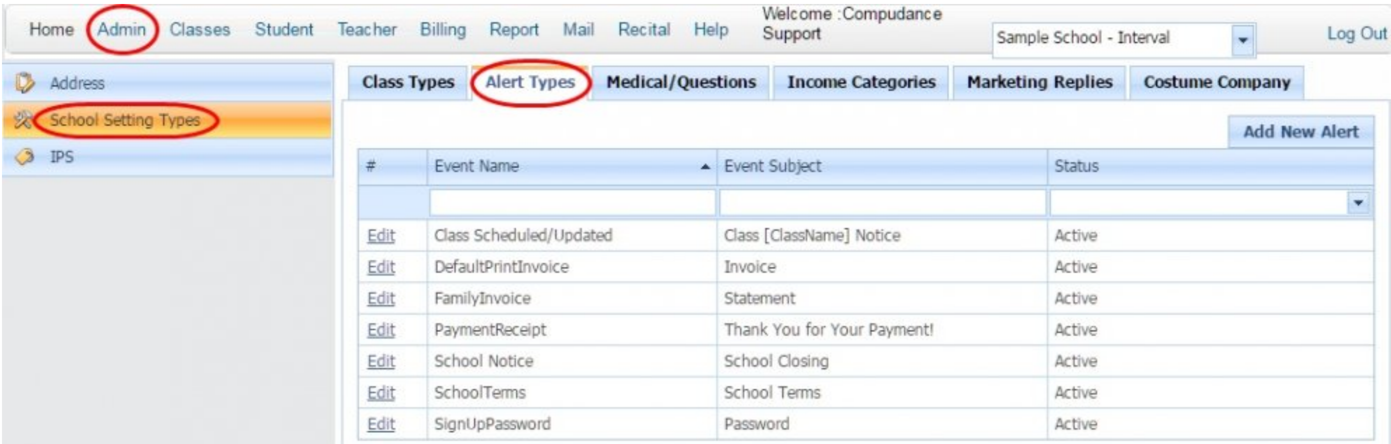
PaymentReceipt	This is the receipt template that can be emailed or printed.	You have options to print or email after payment is taken. You can also create a receipt later if you go to View/Pay Invoices and click Receipt in the Payment tab. (A statement can also show payment information and how applied.)	[bracket fields] are populated from the system. The school details on the top can be pulled from the data CompuDance has (default) or you can change the School Name and Contact information to whatever you wish.
Class Scheduled/ Updated	This is a special notification that can be set if the Student Subscription is linked to a class being scheduled.	This message is automatically generated to a student email when a class is scheduled on the calendar home page. Typically used for privates or classes not on a regular schedule.	There is setup that must be performed for this apert to be triggered. See Student Subscription
SchoolMessage	This message can be customized by the school to tell the customer the school procedure after classes are enrolled for a student.	This message is displayed in the Parent Portal after a previously registered student is enrolled in a class.	Schools may have different procedures to secure a class after a previously registered student enrols in new classes. For example; Some may say an invoice will be sent within 72 hours, others may say audition dates or contact information.

Click the links to see more details on the Invoice and Statement Alerts or Online Registration and Parent Portal Alerts

! The alert is recognized by its name, do not change them or add spaces.

Invoice and Statement Alerts

You can add a message to an invoice or statement by editing the corresponding Alert.
Go to Admin->School Setting Types -> Alert Types



The Alert **DefaultPrintInvoice** is the actual format for View/Pay Invoices to print or email what is in the list.

The Alert **FamilyInvoice** is the Format for the Student or Family Statements that are generated in Family Ledger Report .

Click Edit in front of the one you wish to change and then in the bottom box you should be able to type or paste in the message.
Keep in mind, the printable alert **DefaultPrintInvoice** may have page break issues if you make changes affecting the length of the document.
All fields contained by [hard brackets] will be populated from the system for the specific scenario.

Make sure you click Update to save the changes.

! These changes will be reflected in all invoice or statements until the alert is edited again.

If you need assistance, please contact us. We do have experience in formatting for invoices that will use a window envelope and other scenarios.

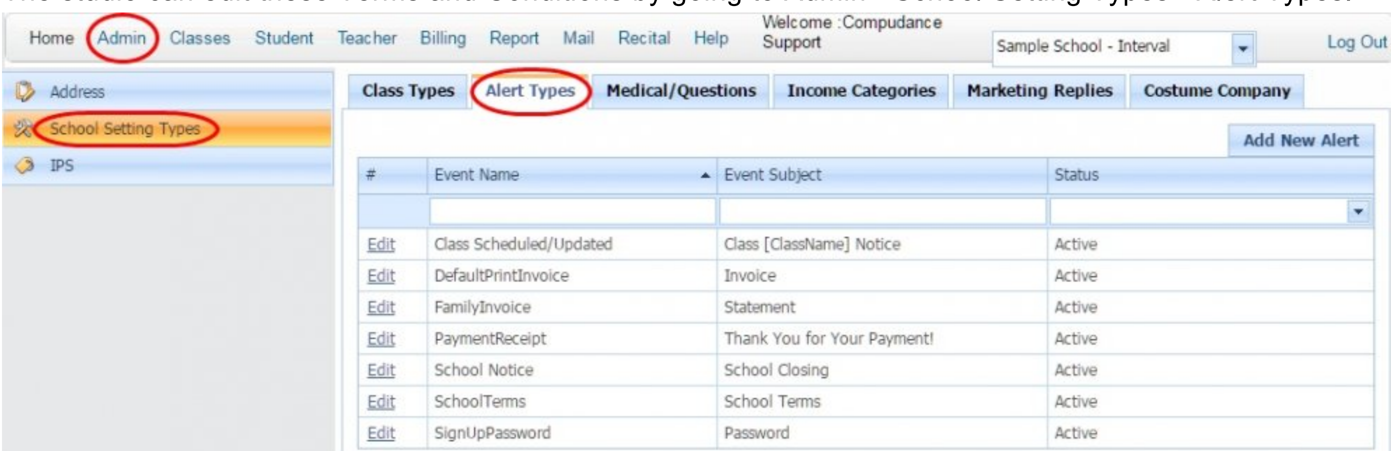
Online Registration/Parent Portal Alerts

The studio is able to update their Alerts which are displayed and sent to the Parents.

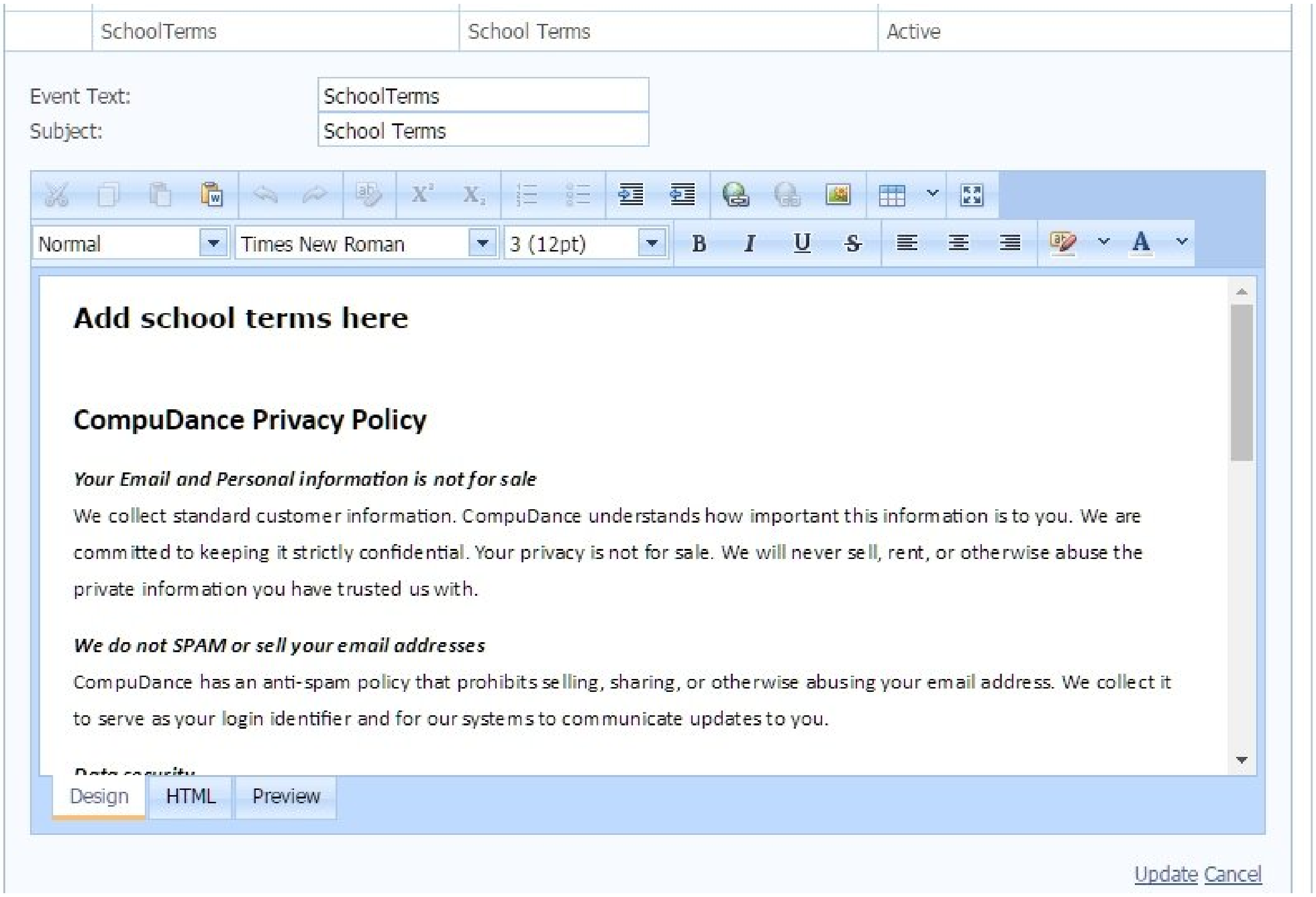
> ! Do not change the Names of the Alerts. You may edit the subject line but not the Name.

For the School's Terms and Conditions which must be accepted when enrolling and accessible in the portal through a link on the left side menu.

The studio can edit these Terms and Conditions by going to Admin->School Setting Types->Alert Types.



Click Edit in front of the **SchoolTerms** alert.
Make your changes to the alert.

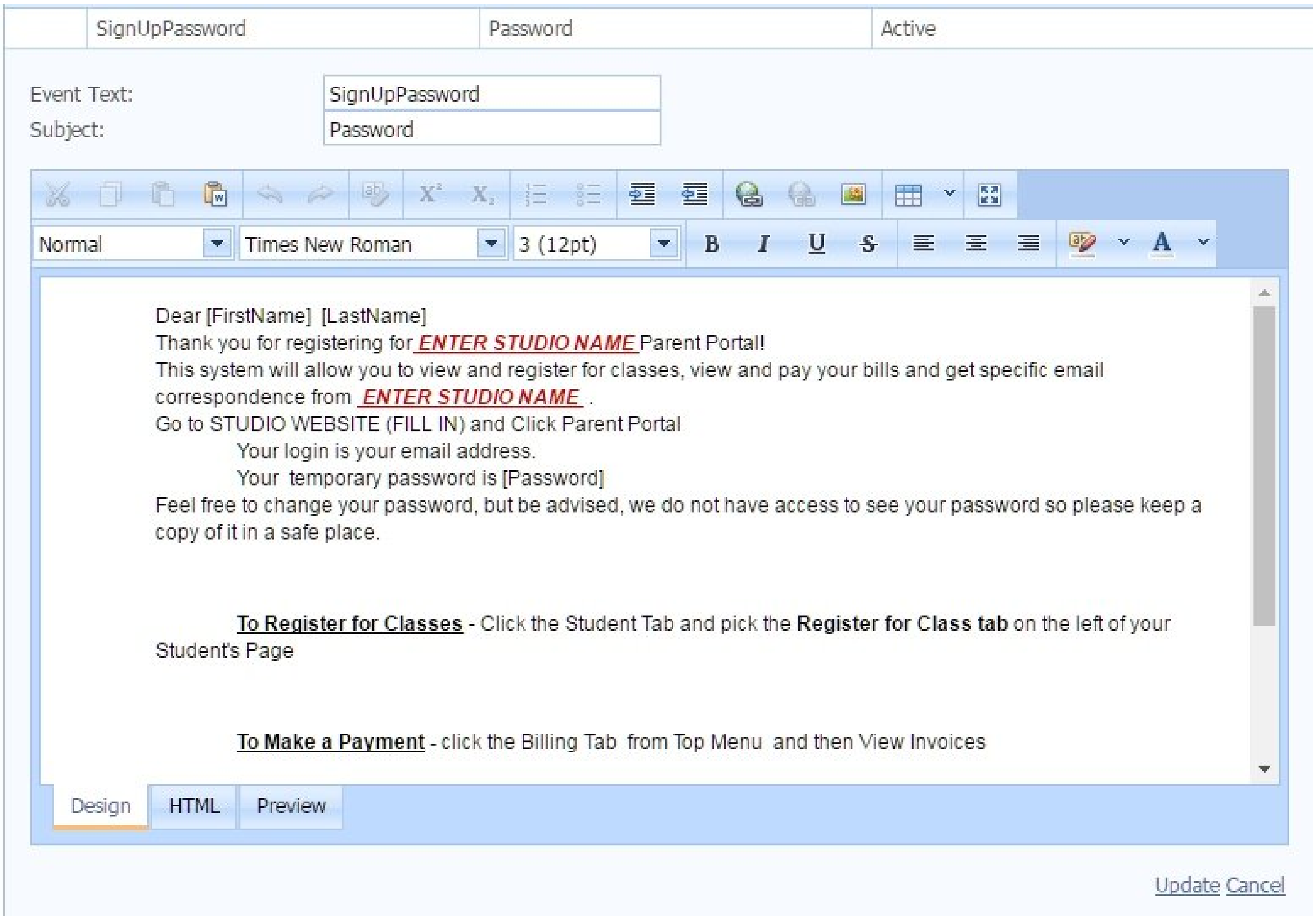


Keep in mind that CompuDance does have a privacy policy at the bottom. Do not remove it. These are for your client's peace of mind that we will not sell any information given or have access to the financial data entered. If you removed the Compudance portion in error, They are found in the bottom of our website and can be copied back into the alert.

Click Update to save your changes.

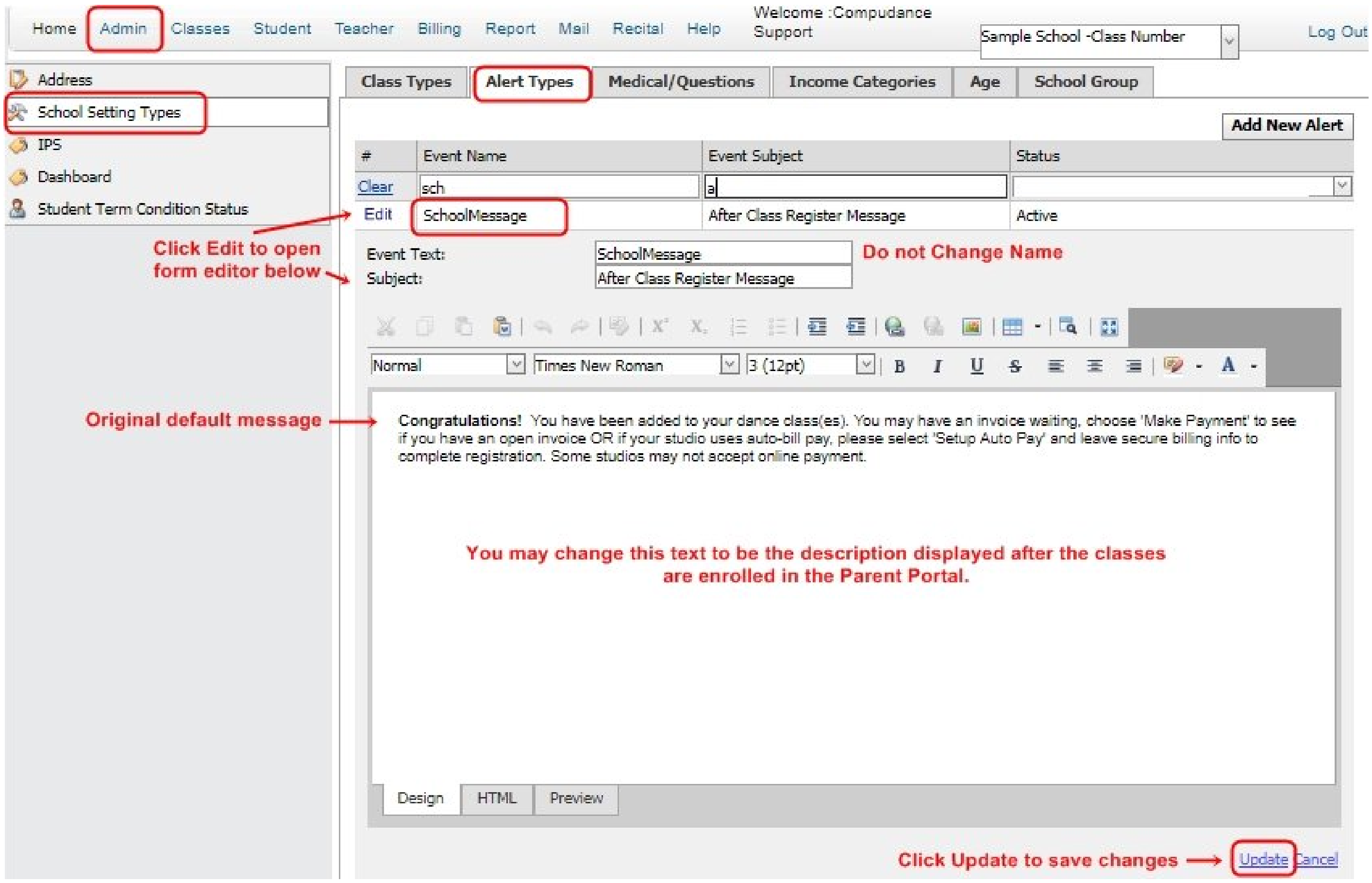
There is a second Alert which issued to generate and email to the customer when they sign up online for an account called SignUpPassword

You may edit this alert if you wish to great your customer in a different way than currently stated or give the customer specific instruction as to how you wish them to use the system and what to expect from the studio. For example, you may state that a registration fee invoice is ready for payment to in order to accept an classes enrolled or that the studio will contact the customer within the next 72 hours to review the student's ability or class selection.



All fields with a [hard bracket] will be auto-populated by the system when sending.
Make sure you click Update to save the alert.

In the Parent Portal there is a pop-up message displayed after a student is Enrolled in Classes. You may edit this message by changing the alert “SchoolMessage”.



If you have any questions, please feel free to contact us.

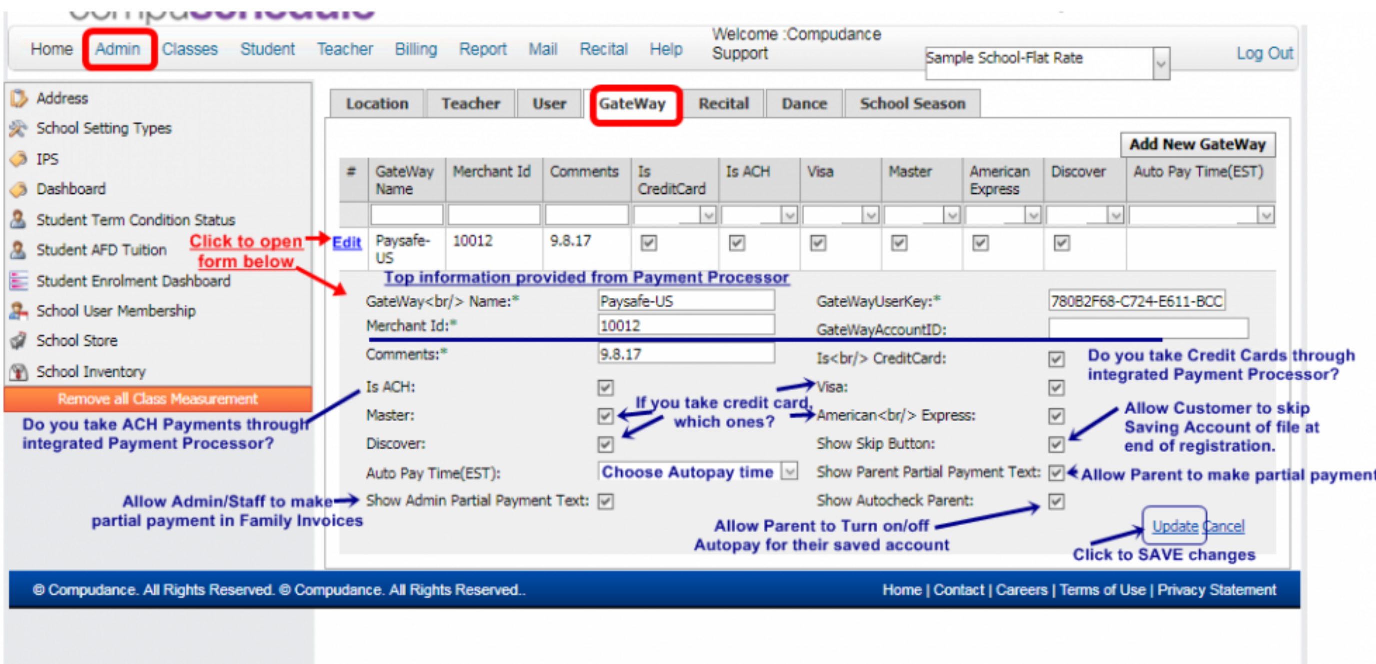
Gateway

The Gateway tab found in the main Admin section allows for a payment processor to be integrated with our system.
This will allow the school to process credit cards and/or checking account withdrawals (ACH/EFT) for payment from an existing invoice in CompuDance.
The payment can be entered by the school or customer if online registration/portal is activated.
It can be processed as a one-time transaction for an invoice or group of invoices, or be from an account on file.
The payment account on file can be select by the school or customer or by the autopay system.

There should only be one active gateway per school.
The gateway information will come from the account processor who must be an approved processor for the integration to work.

In the gateway information, the school has the option to allow a new registration to SKIP saving a payment account on file.
If you check the box, Show Skip Button this will allow a registrant to click SKIP and not enter an account.
If it is not selected, the registrant will not be allowed to complete the registration without entering an account.

You may allow customers to make a partial payment to an invoice in the Parent Portal. To give them this ability check the box Show Parent Partial Payment Text.
To allow The Staff and Admin to make partial payments in the View/Pay Family Invoices section, check the box Show Admin Partial Payment Text.



If you* accept credit card payments*, you must have Is Credit Card checked.
You must then check off the types of credit cards you accept.
Keep in mind, Discover and American Express must be explicitly requested for when you apply with the processing company.
You can see if you accept these cards by looking at your VAR sheet.

If you **accept ACH/ payments from checking accounts** then you will need to have Is ACH checked.

The system will look at these checkboxes to show only the payment types that are selected to the parent, student and studio users.

If you have **Autopay activated**, you can select the time of day you wish these invoices to begin processing.
You can choose any of the following times in the Eastern time zone (4 am, 4 pm, 8 am or 8 pm)
Compudance will need to turn on the autopay feature if you would like to begin using it.
You may allow the customer to turn on and off the auto payment from their account saved on file. If you want them to be able to turn on and off autopay, Check the box Show Autocheck Parent.
[Click Here To see more about Auto-Pay](#)

Our Integrated Payment Processor is [PaySafe](#)

	For USA Businesses	Outside the USA
Our Contact:	Joanna Diaz	Zachary Schneiderman
Phone:	1 949 788 1010 ×131	1 514 380 2700 ext. 8292

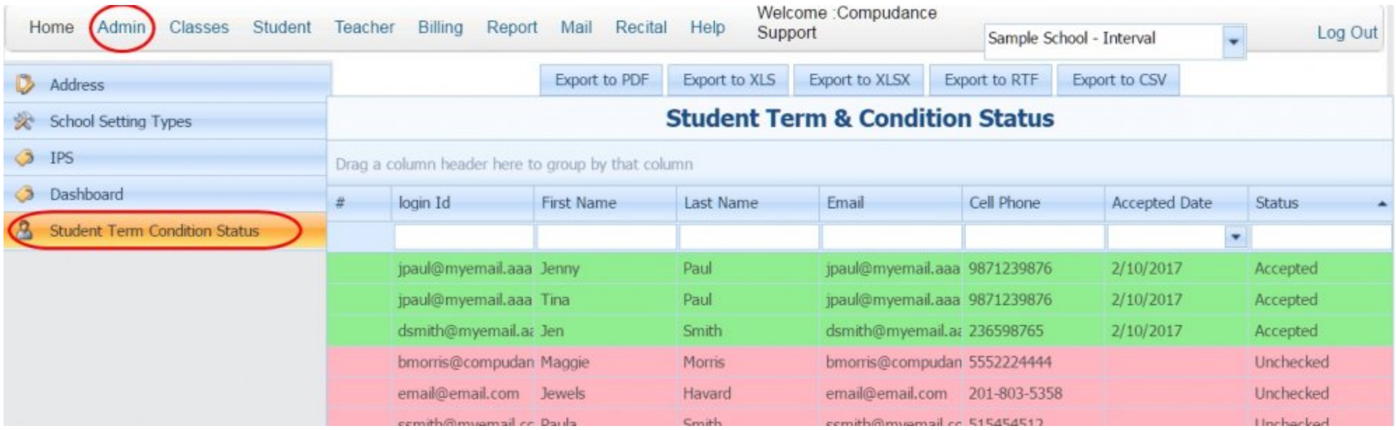
Email:	joanna.diaz@paysafe.com	zachary.schneiderman@paysafe.com

They prefer email as contact method.

Parents accepting School Terms

The school can now see if and when a parent user has accepted school terms in our system as of February 10, 2017.

To see the list, go to Admin->Student Term Condition Status.



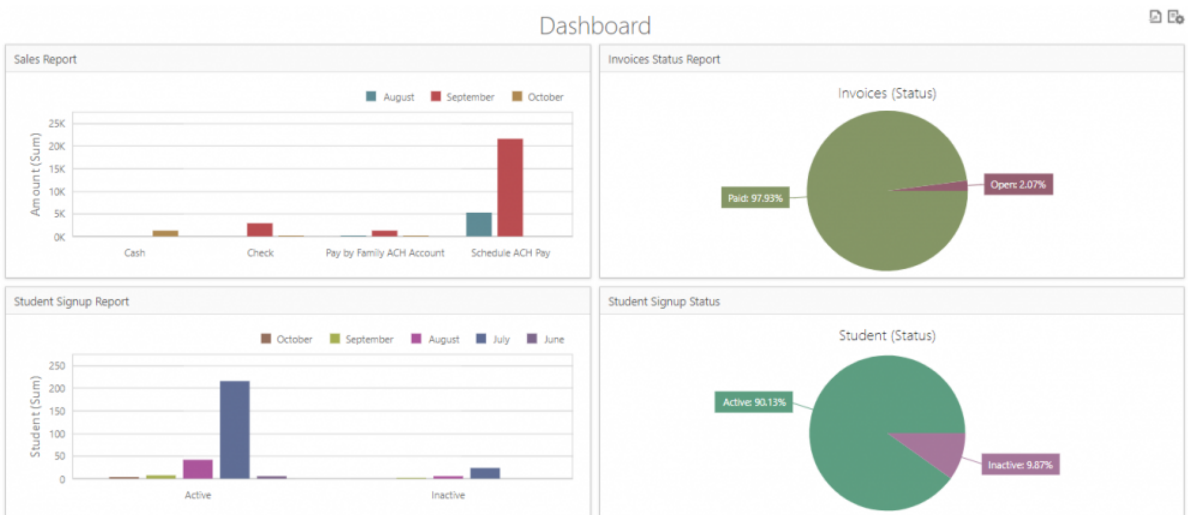
To change your [Terms and Conditions] go to Admin-> School Setting Types-> Alert Types Select SchoolTerms

Admin Dashboards

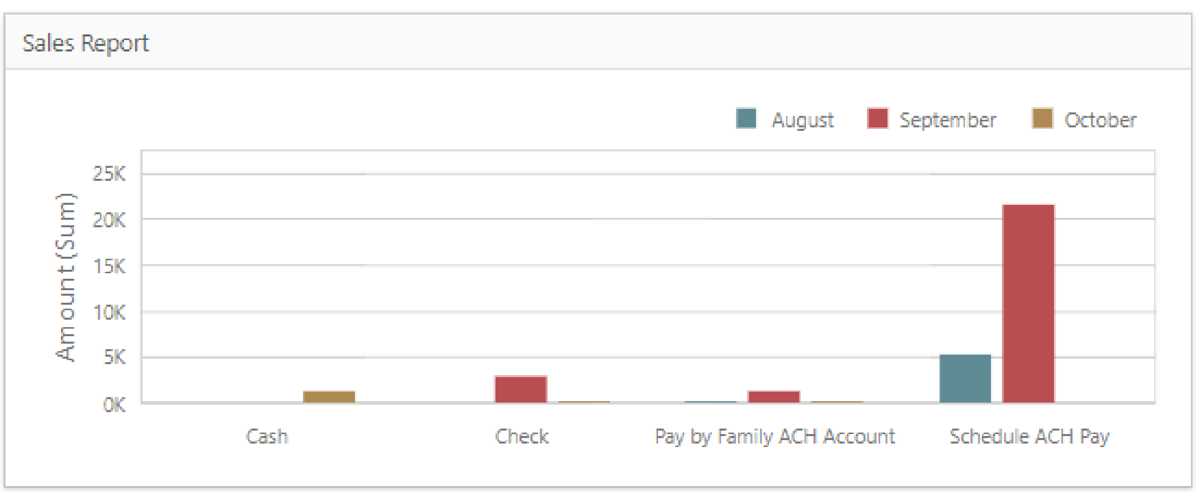
We have two Dashboard pages for you to get a quick glance at the studio standings.

Admin-Dashboard

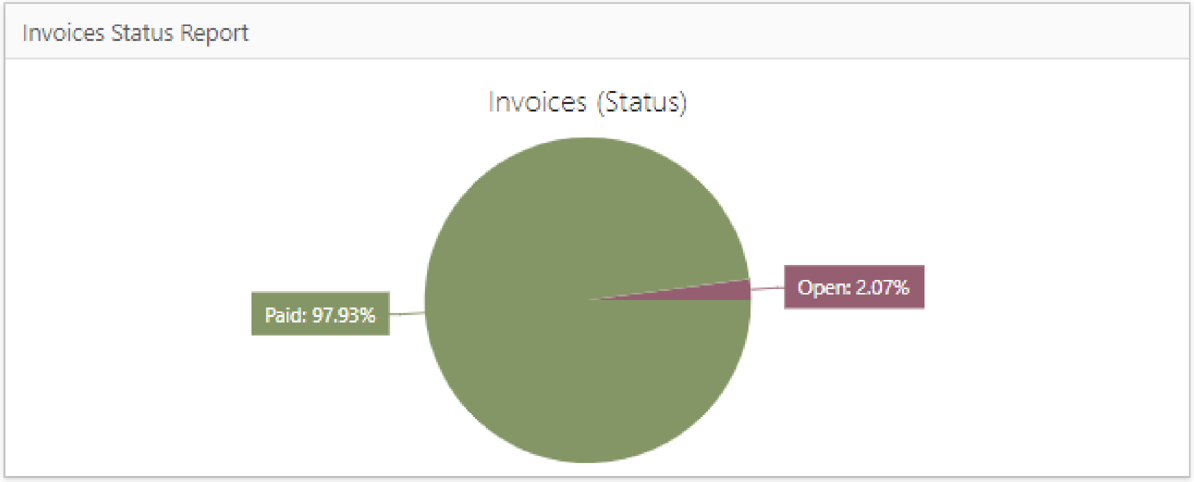
This page will display 4 graphs.



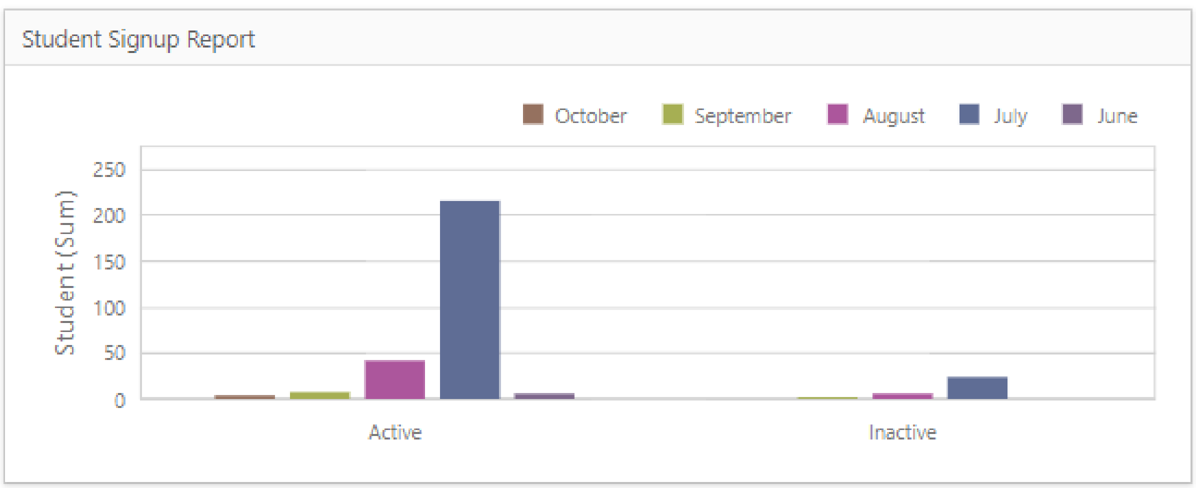
The Sales Report graph is a bar chart representing the type of payments you receive and the amount received using that process.



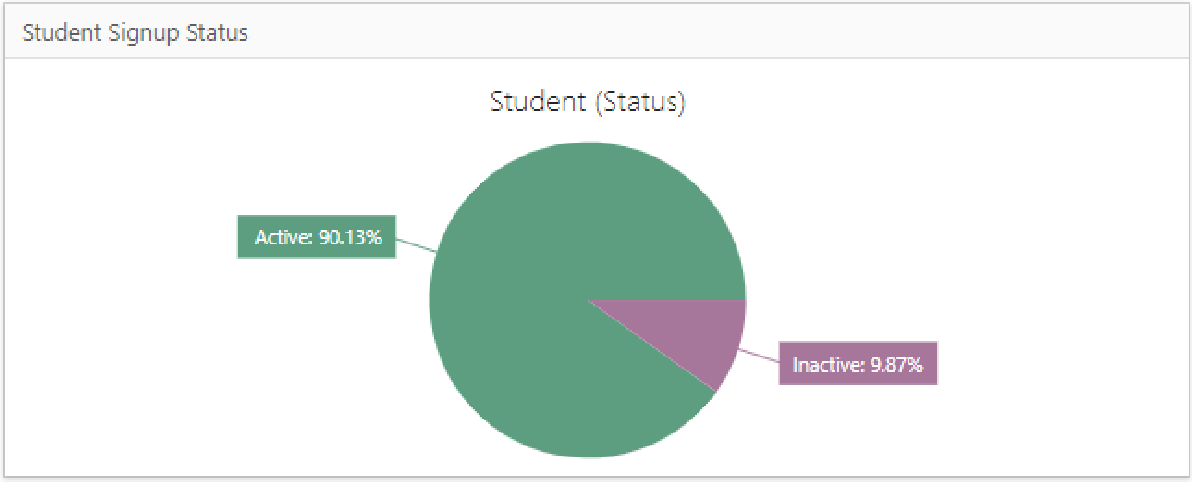
*The Invoice Status Repor*t shows the percentage of Open and paid invoices for the school.



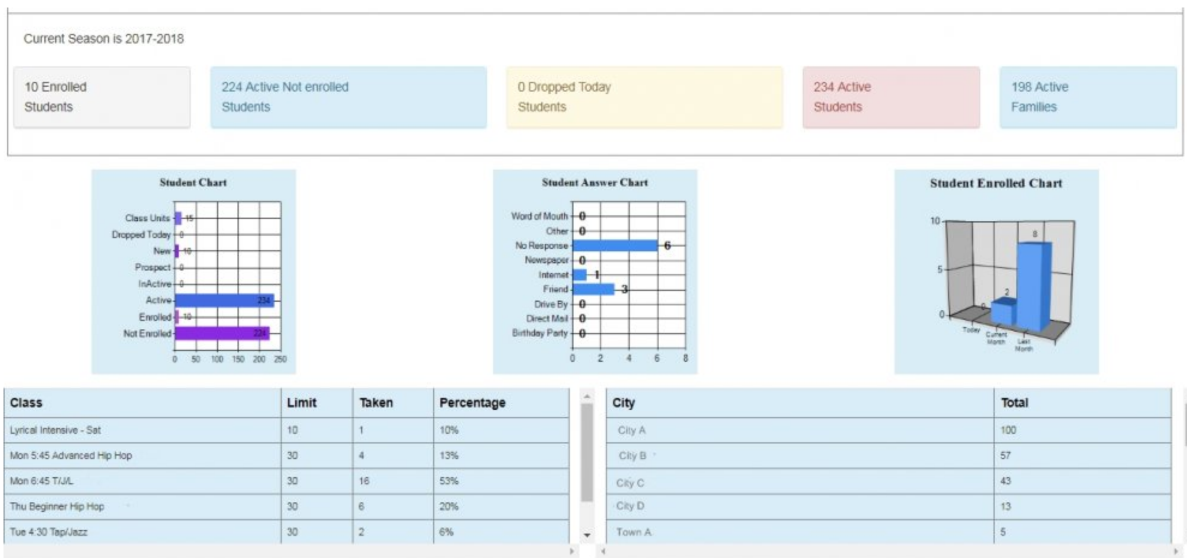
The Student Signup Report allows you to see the month students originally registered in and the breakdown by current status.



The Student Signup Status tells you the percentages of Active vs. Inactive Students



Student Enrollment Dashboard



Class	Limit	Taken	Percentage
Lyrical Intensive - Sat	10	1	10%
Mon 5:45 Advanced Hip Hop	30	4	13%
Mon 6:45 T/J/L	30	16	53%
Thu Beginner Hip Hop	30	6	20%
Tue 4:30 Tap/Jazz	30	2	6%

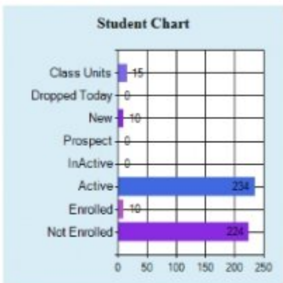
City	Total
City A	100
City B	57
City C	43
City D	13
Town A	5

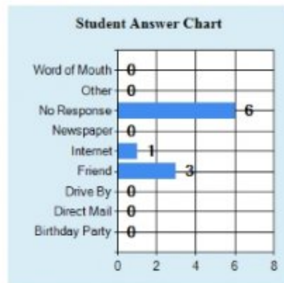
This page will show you the Students Enrollments as of today.

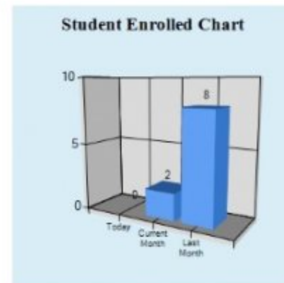
- How many are currently enrolled
- How many Active students are not enrolled
- How many dropped today

- How many Active Students in total
- How many Active Families in total

You will also see 3 graphs







- The first will be a student chart (Active, Prospect, Inactive), Enrolled, Not Enrolled and Dropped
- The Second is your marketing results- How did you Hear About Us? Question. It will display the results for marked in student registration or on the School Questions tab in the students details.
- The 3rd Graph displays the current enrollment progression. How many Enrolled today compared to how many enrolled this month compared to how many enrolled last month based on the registration date.

The bottom section has 2 charts.

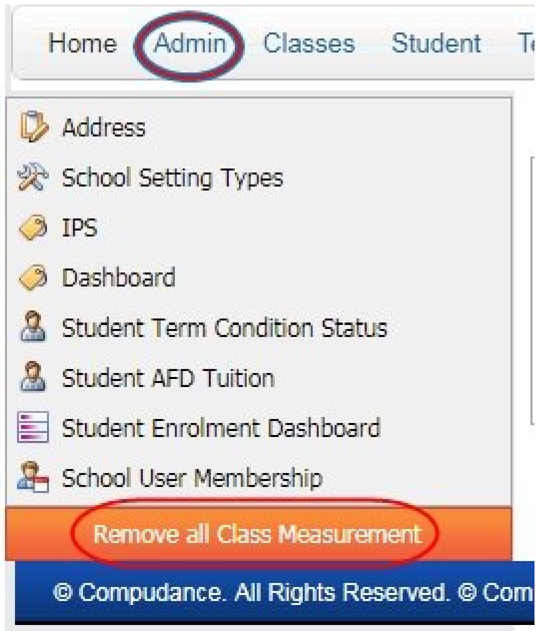
Class	Limit	Taken	Percentage
Lyrical Intensive - Sat	10	1	10%
Mon 5:45 Advanced Hip Hop	30	4	13%
Mon 6:45 T/J/L	30	16	53%
Thu Beginner Hip Hop	30	6	20%
Tue 4:30 Tap/Jazz	30	2	6%

City	Total
City A	100
City B	57
City C	43
City D	13
Town A	5

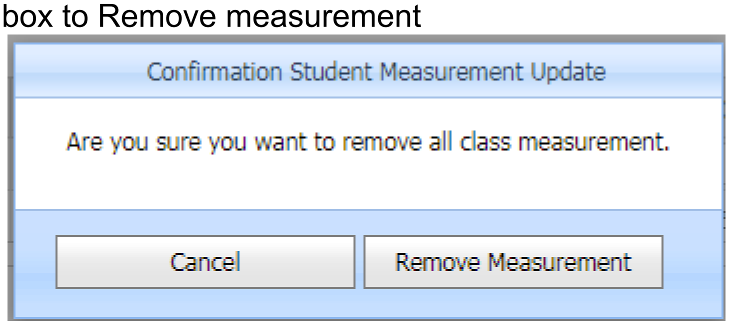
- The first will show you default season classes and their percent of capacity
- The second will list where your active students live and the quantity from each town/city. (Enrollment status is not considered.)

Remove Measurements

You now have a function in Admin called -Removal All Student Measurement



Click this option to remove all measurements from your database.
Then confirm in pop-up box to Remove measurement

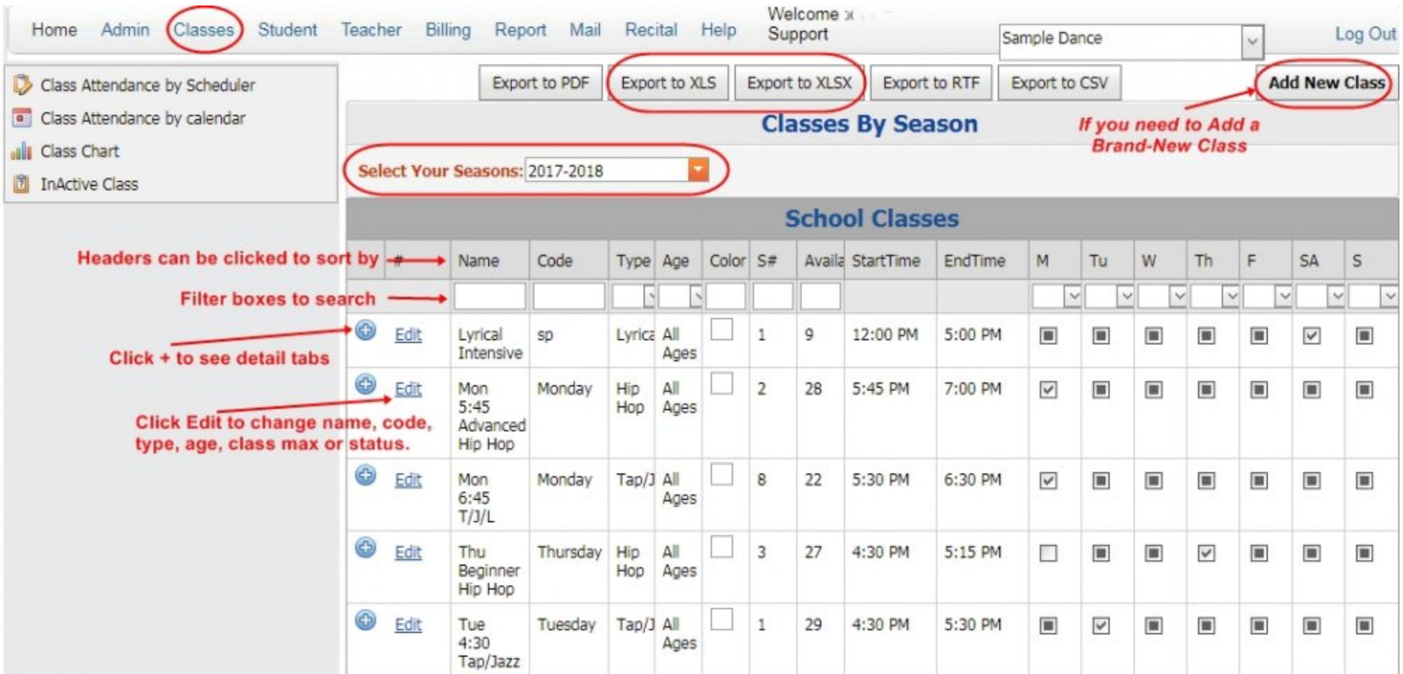


✻ If you entered in a few classes already, run the measurement report in Report-Measurements Report for the classes already entered so you can input them again.

Manage Classes

To access the Class Menu, select Classes from Top Menu bar.

This list will be displayed by the season the class is associated with.
The Default season is the one loaded first.
If you want to change to a different season, just use the Select your season drop-down



This list can be sorted by any column by clicking on the column header. Additionally, you can search for a class by using any of the white search boxes underneath the column headers.

Click Edit in front of any class to change the Name, Code, Type, Age group, Status, Color for the calendar and class maximum.

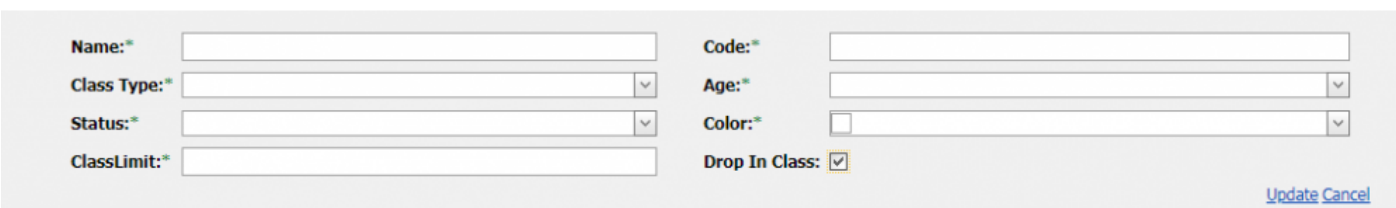
Click + to see the detail tabs for the class.

> Class list can be exported to Excel (XLS) or (XLSX)

Add a New Class

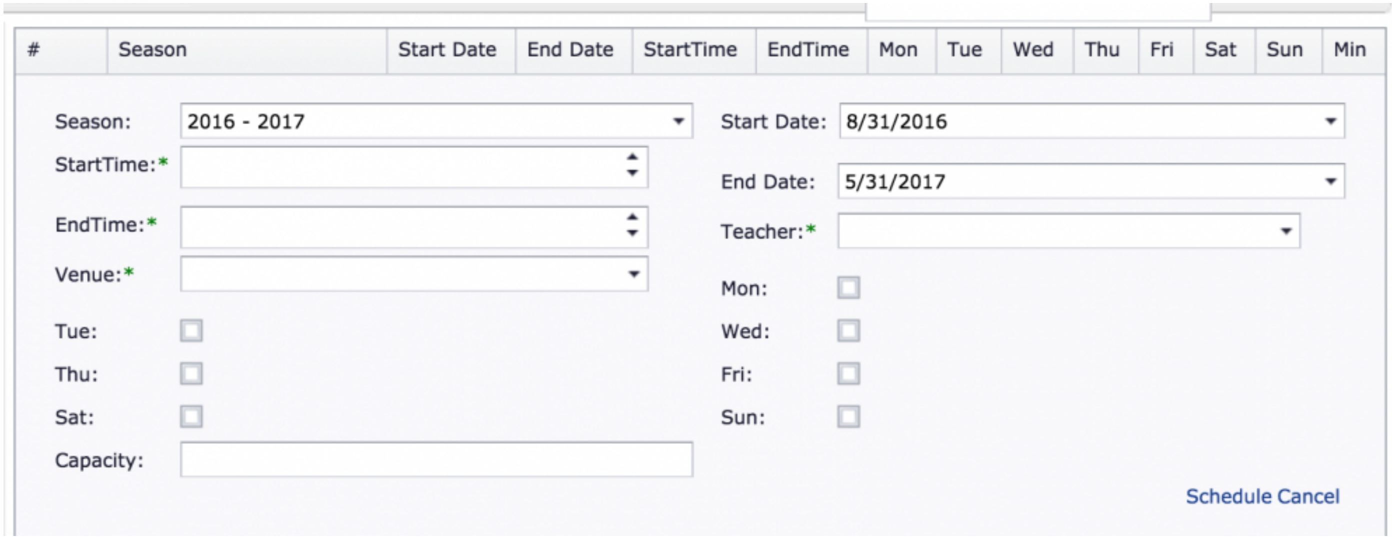
Click the **ADD NEW CLASS** button on the upper right side

You will begin by completing the class name and description. All fields with a * are mandatory.



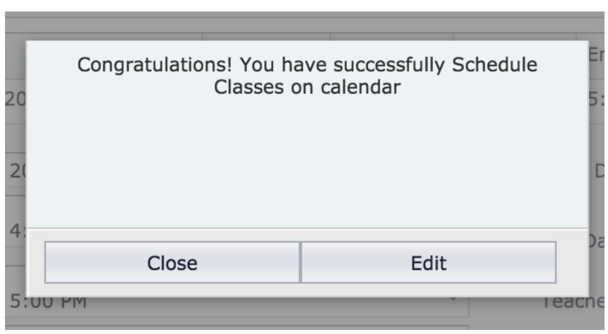
Name – can be whatever you like
Code – is a further description of the class – can be the level, day it meets, etc
Class type – this is the class genre. Select the type from the drop down menu (customized by studio). To set the categories for your school go to Admin->School Setting Types->Class Types
Age – This is the Age range the class is designed for. To set the categories for your school go to Admin->School Setting Types->Age Groups.
Color – the color assigned to a class, appears on the homepage calendar. It can be used to designate a teacher, classroom, etc. If the preference is to not assign a color, select white.
Drop in Class – check this box to accept drop in enrollment by the day.
Status – **ACTIVE** is a live class, **INACTIVE** is a class that is not currently active, and **DO NOT SHOW** is an Active class but prevents the class from appearing to a parent login in onlie registration or in the portal.

Once all the data is entered, hit update to save. You will then be presented with the following screen:



Season – defaults to the current season/session but can be overridden to another season
Start and End Dates – The dates define the time period of the class. They are defaulted based on the season but can be overridden.
Start Time and End Time – Determines the class length
Venue – The classroom/studio where the class meets
Teacher – This is the main teacher assigned to the class. Select one from the drop down menu. Additional teachers can be added from the teacher tab.
Day of the Week – a class can meet 1 or more times a week. Select the appropriate day(s)
Capacity – this is not a mandatory field, it is the max number of students allowed in the class

Lastly, click **SCHEDULE** to save class and auto-schedule onto the calendar. You will receive a confirmation box. You can click close if you are finished or edit to make any changes.



Edit a Class

You are able to change the main information of a class if you need.
This includes Class Name, Age Group, Class Type, Class Limit, Color and code.

> ! Any Information you Edit for the Class Line will be changed for every instance of this class.

If you make a change to the **Class Name**, it will change for all occurances in your system. For example if you have a misspelling, you can correct it and all places the name is shown will change.
If you used to keep the day of the week or times in the name which will be different in the new season, you can edit that out now that we have other fields tracking that specific information.

> ! **DO NOT** Change a Class drastically to another class if the class was previously used in any season.

If you change the **Class Type**, please make sure the new class type is properly marked as Billable or not. Billable is if the class is calculated in Tuition.

You may Edit the **Age Group**. Most studios will allow this to change year by year depending on the student ages enrolling. If you do not care about tracking this information for the previous years, just change it. If you want to know the specific classes and ages by year, you can create a new class.

Class Status can be changed.
If you use online registration/Parent portal. **Active** is used to allow Parents to register for the Class. * Do Not Show* will keep the class active for the studio, but parents will not see it to enroll in. If you are making a class* Inactive* -this means the class in no longer offered. *Please clean your data* and End Enrollment for all of your students in the class. You can also remove any scheduling dates from the calendar that will not be held. To do so go to Class Day Time tab the class.

The **Class Limit** controls the maximum number of students to enrolled in the class per season. If the class has reached the limit, it will not allow anyone to add a student to the class, unless another student ends their enrollment or is dropped or if the Class Limit is increased.

The **color** is used for the color the class is designated on the calendar pages. This includes the parent portal calendar page. You may change it for the class at any time. Some schools will use the color to designate something to the school. It may represent a genre, teacher, venue/room, age group or level. The studio can determine how they want it displayed. CompuDance recommend the lighter colors so the Black text can be read correctly.

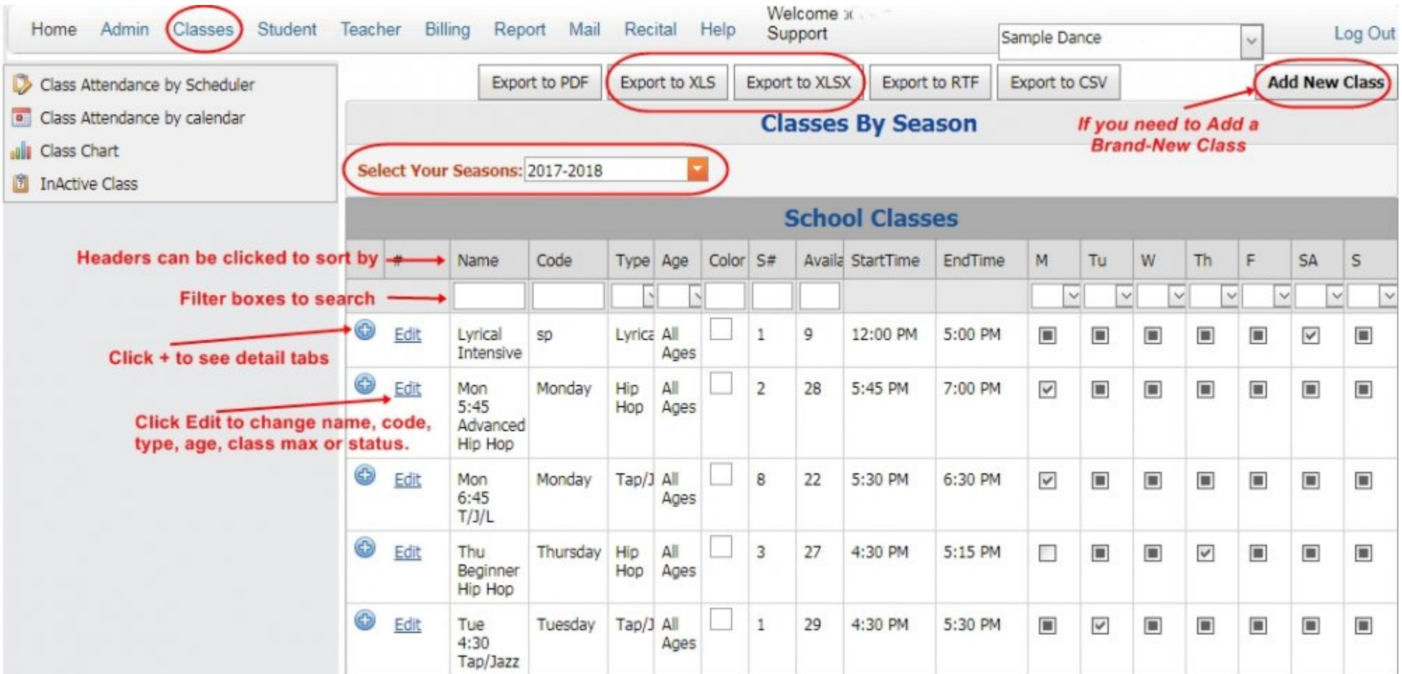
Remove a class

If you are no longer holding a class, go to Classes section.
Find the class, click plus.
If you still have students enrolled, select the all and enter the last date the class was held in the end enrollment date field.
Then click End Enrollment.
Go to the Class Day Time tab. I would sort by day date in descending order, so click the column twice.
Select the dates that are no longer occurring. Then click Delete.
You can also go to the Class Teacher tab and end the assignment for the teachers assigned.

If you are not going to offer this class in the future for a different season, you can click edit on the class and make it inactive.
If you do plan to use it, you can leave the class in your list if you wish. If you still have open enrollment through the parent portal for this currently offered season, make the class have a status of Do Not Show.

Class Data Tabs

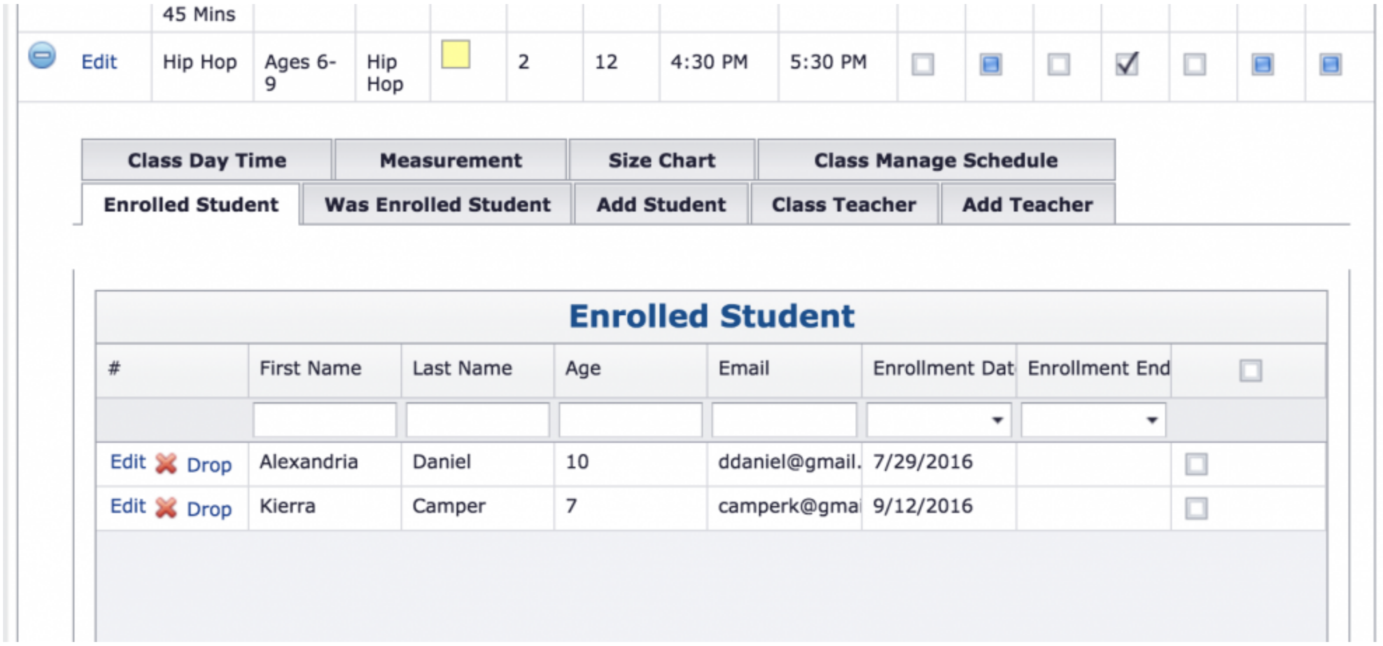
Once classes have been entered, they are listed in a grid. The default list of classes are those in the current season. The season can be changed to view classes in a different season.



The class grid can be sorted on any column. Simply click the column header and the data will be re-sorted. If you need to find specific data, use the white search boxes located under the column header. Enter in the data you want to locate.

Edit vs. Plus Sign

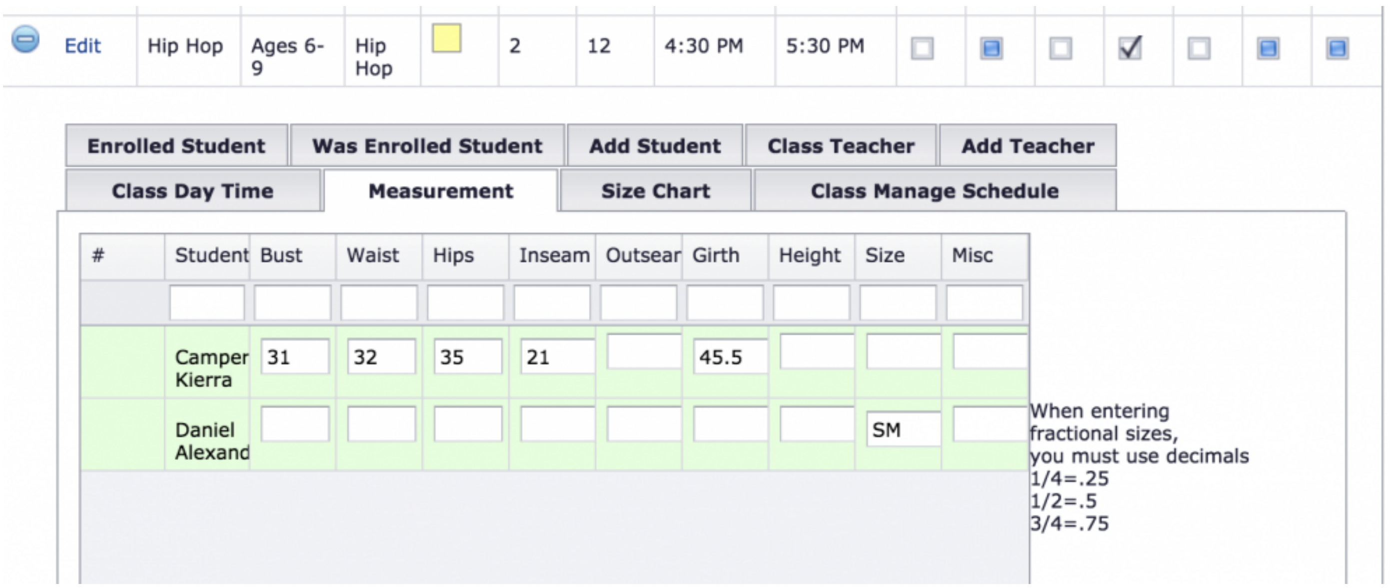
Edit – reveals the class name/description data fields as well as the status of the class.
Plus Sign – reveals tabs that store additional information pertaining to a particular class – see below



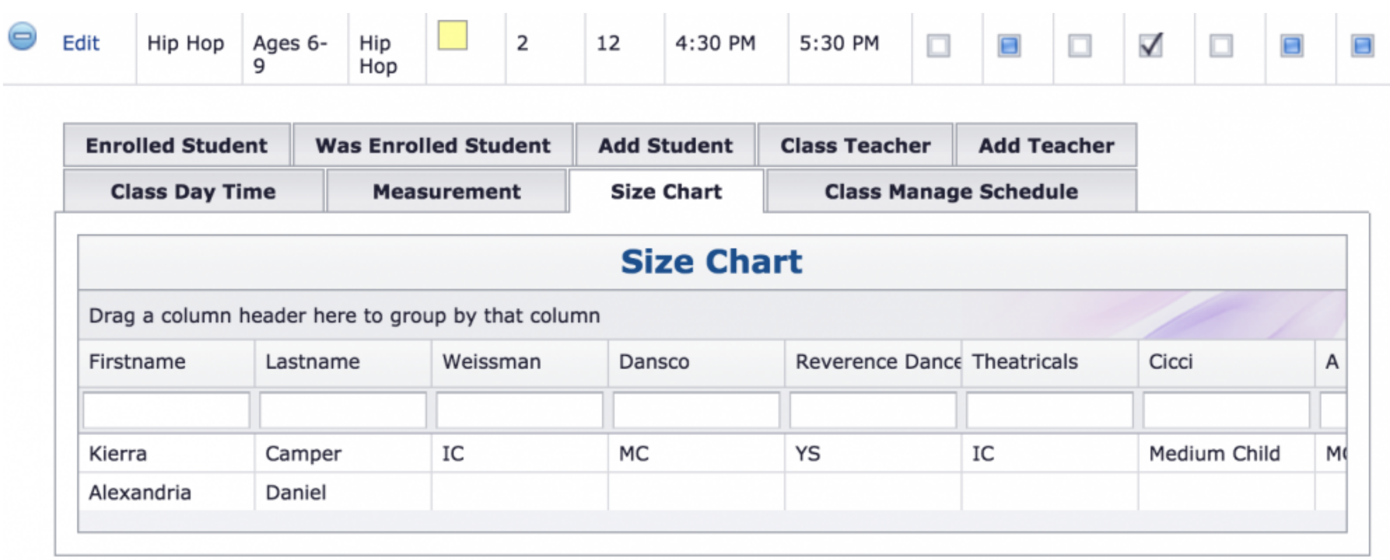
Tab Name	Function
Enrolled Student	List of enrolled students
Was Enrolled Student	list of students that have UN-Enrolled from the class
Add Student	allows the addition of one or more students to the class
Class Day Time	List of entries of class on the calendar
Class Manage Schedule	allows edits to class day, time or main teacher
Measurement	Enter measurements for students in the class
Size Chart	Auto sizes costume sized for each student based on student measurements and costume manufacturer size charts.
Class Teacher	Lists any additional teachers for that class
Add Teacher	allows additional teachers to be added. Main teacher is selected on Class Manage Schedule tab

Measurement and Size Chart

Measurements can be added either from the student record or from the class. The measurement tab will only display the students enrolled in that class. When entering fractional sizes, use decimals (not fractions). For example, enter .5 instead of 1/2.



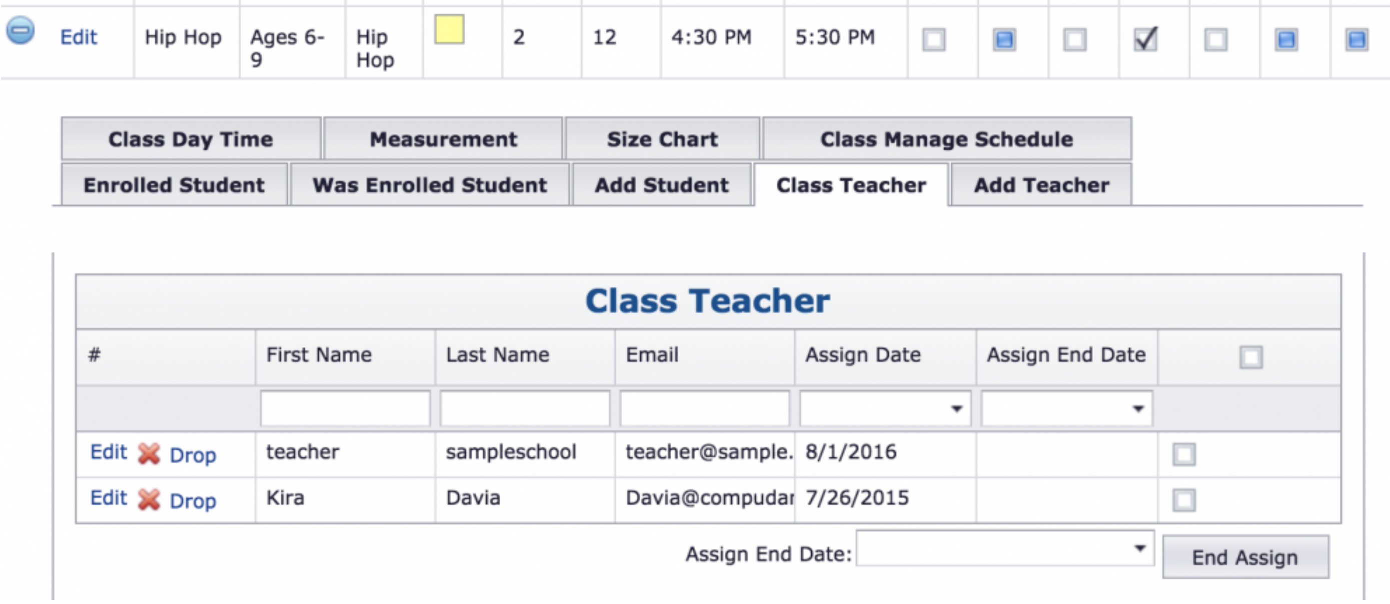
Size Chart tab – Once the measurements have been entered, the system will auto-calculate the size based on the manufacturer's size charts. We have loaded the most common manufacturers.



! If you have last year’s measurements saved, you may remove them all by using the Admin-Remove Class Measurement function

Class Teacher and Add Teacher

Already assigned teachers are listed under the Teacher Tab



To add additional teachers, select the Add Teacher Tab

You will be presented with a list of available teachers. Simply check the box on the teacher you want to add and enter an assign date. Lastly, click ASSIGN to save.

Edit	Hip Hop	Ages 6-9	Hip Hop		2	12	4:30 PM	5:30 PM	☐	☐	☐	☑	☐	☐	☐

Class Day Time	**Measurement**	**Size Chart**	**Class Manage Schedule**	
Enrolled Student	**Was Enrolled Student**	**Add Student**	**Class Teacher**	**Add Teacher**

School Teacher

#	First Name	Last Name	Email	Assign Date	Assign End Date	☐
Edit	Maureen	Strehl	info@compuacad	12/8/2016	12/8/2016	☐
Edit	Cara	Murphy	Cara@compudan	12/8/2016	12/8/2016	☐
Edit	Tricia	Tots	triciastotsdance@	12/8/2016	12/8/2016	☐
Edit	Kaleigh	Sanders	KS@compudance	12/8/2016	12/8/2016	☐
Edit	Felicia	Eric	Eric@compudanc	12/8/2016	12/8/2016	☐
Edit	Georgia	Smith	Georgia@demo.c	12/8/2016	12/8/2016	☐

Class Day Time

This is a list of classes scheduled on the main calendar to the specific date.
You can sort it by date, filter it for a specific season.

You may delete classes form the calendar by selecting that row and then clicking Delete.
If you wish to remove multiple dates, you may select them individually or you can select the top right corner box to select all rows on that page.

This list is also useful to check for scheduling issues.

The video example below will show you:

- where the Class Day Time tab is
- how to sort the grid by date
- how to delete 1 scheduled class date and a group of them
- then show the results in the calendar

How to Delete a Scheduled Class

To delete classes that are not going to be held

By date of Holidays or School Closing
You can go to the Home screen (calendar) go to a specific date and remove the classes for that day.
Just right-click on the class occurrence and select Remove selected class.
If you have a Mac/Apple you can hover over the class to get the choice to remove the Class Occurrence for that date.

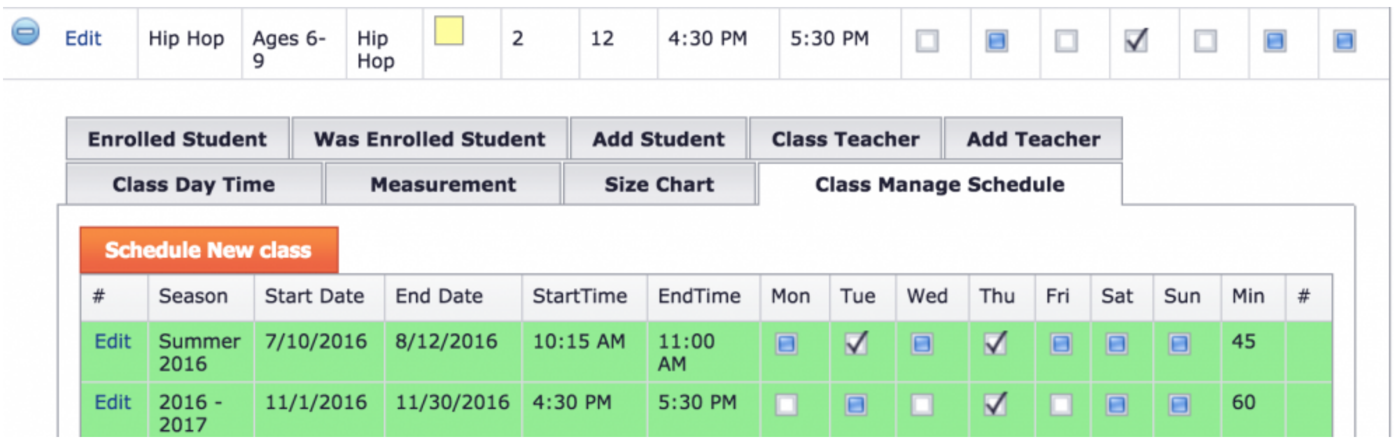
To remove for 1 specific class
Go to Class Day Time tab for the class
Sort by Date in either ascending or descending order
Find the dates to be removed
Check them off on the right
Click Delete

> **!** If the class is being canceled, you will need to end enrollment for any current students in the class and remove the class dates from the schedule as described above, prior to clicking Edit for that class and changing the status to Inactive.

Class Manage Schedule

Class Manage Schedule

This tab allows you to schedule this class in the seasons.



This tab has two functions:

1. Editing day, time, teacher of class, venue/room
To edit the class details, click edit in the row of the season you wish to change.
You will see the form appear for that season.
If the changes are for the entire season , you may change the necessary information. Click Schedule to save changes. Calendar will automatically get updated with the new details.
If the change applies to only part of season , you can change the start and end dates to define when the change begins and ends, then make your other changes. Click Schedule. The dates previously scheduled outside of the date range will not be affected.

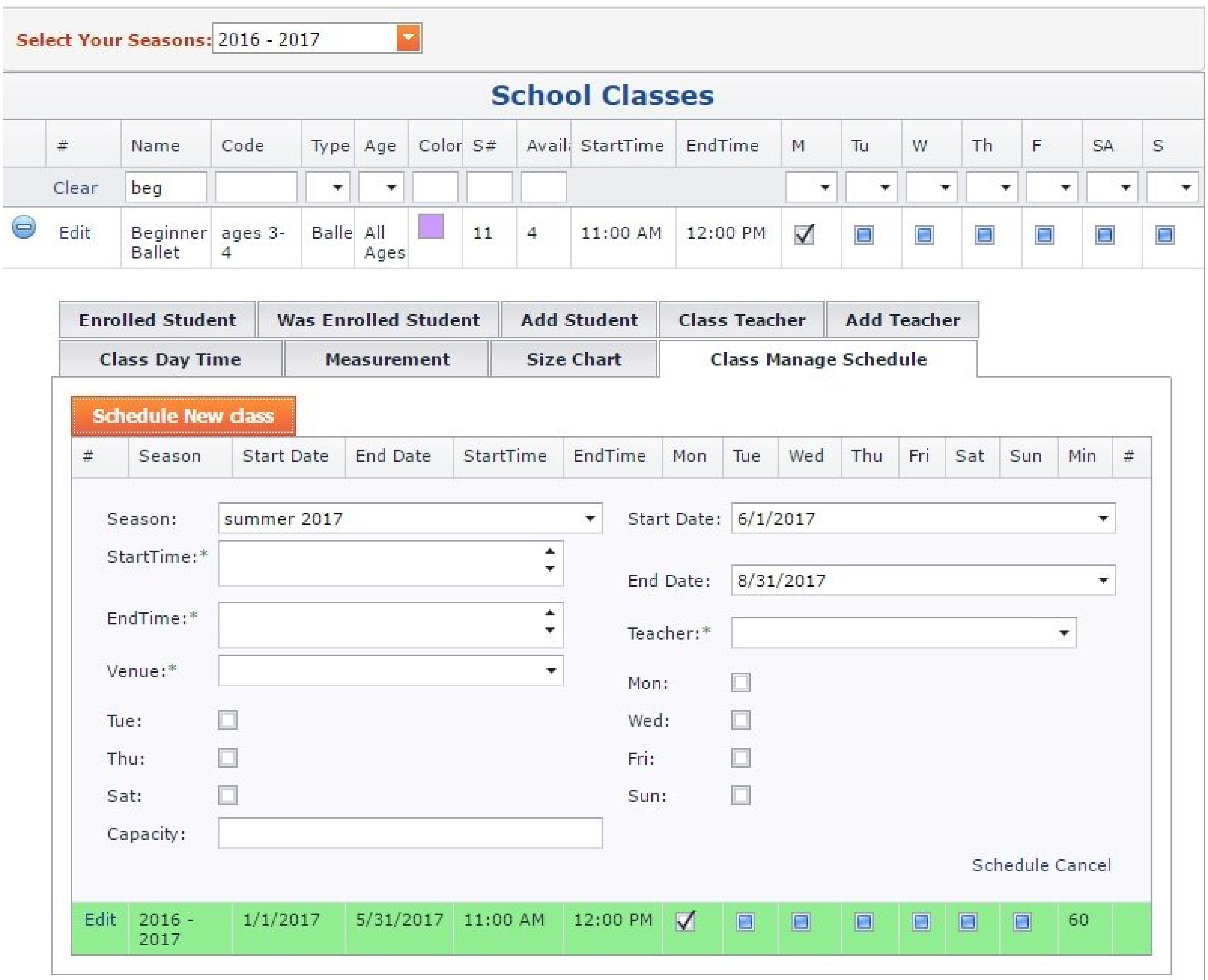
2. Adding a class to new season
If a studio offers the same class year after year, a new class does NOT need to be created each time. Instead, the class simply needs to be added to the new season. The time, date and teacher can be different from previous seasons. The only thing that would remain the same is the class name.

How to add a class to a new season

Click on SCHEDULE NEW CLASS button.

> ✱ We recommend you make the New season the <u>default season</u> so it is easier to schedule the classes.
> Then Go to Classes and change the season to one the class is already scheduled.
> For example if you are scheduling the 2017-2018 season, you may take classes from the 2016-2017 season. So make the new season (2017-2018) set as the default season.
> Then when you go to Classes, this will be the season you see at first. Change it to be the 2016-2017 season so you see all if the classes for that year.

Go to the Class manage schedule tab for the classes that will be offered in the new season. Click Schedule New Class.
Fill in the information for the new season offering.



Complete the following fields. Once complete, Click ‘Schedule’ to save changes and add to class to calendar.

Classes will only be scheduled on the calendar if there is a Day of the week selected.

Season	will display to whatever is set as the default season in ADMIN. Can be changed to a different season
Start Date	Day the class will begin – will default to season date but can be changed
End Date	Last day of class-will default to season date but can be changed
Start Time	Start time of the class
End Time	End time of the class
Teacher	Main Class Instructor, if you need additional teachers, add them on the teacher tab
Day of Week	day of week class meets, can be more than 1. If none selected, the class will not be placed on the calendar.
Venue	classroom or studio the class meets in
Capacity	This field will not override the Class Limit in the main class line.

Class must be scheduled on the calendar in order to:

- Run the Class Manual Attendance Report- Printable report to take attendance.
- Enter Attendance in the system
- Have tuition calculate for the class- if the class has a class type that is marked as billable

Editing a Previously Scheduled Class

You can edit the schedule for a previously scheduled class by using the Class Manage Schedule and Class Day Time tabs.
This includes: the teacher scheduled for the class, the start and end times, the day of the week, the room (venue)

To change how a class is scheduled for the entire season
Go to the Class
Click the plus for the detail tabs
Go to the Class Manage Schedule tab.
Click Edit for the season you wish to change.
If the entire season is being updated, keep the same start and end dates for the season.
If the class is being extended you may update the end date.
Make your other changes if any.
Click Update.
All of the dates in the start and end dates range will be changed if no attendance has been taken for that class date.

If you want to change a smaller range of classes scheduling but have other dates stay the same.
For example, if the class will have an extra practice day at the same time on the second day of the week. you would set the start and end dates to the date range when the extra class would be added. Check off the extra day and click update. Only the days in the new date range will have the extra class. The other weeks in the session will not be changed.

You can use this to temporarily change the teacher or room assigned too!

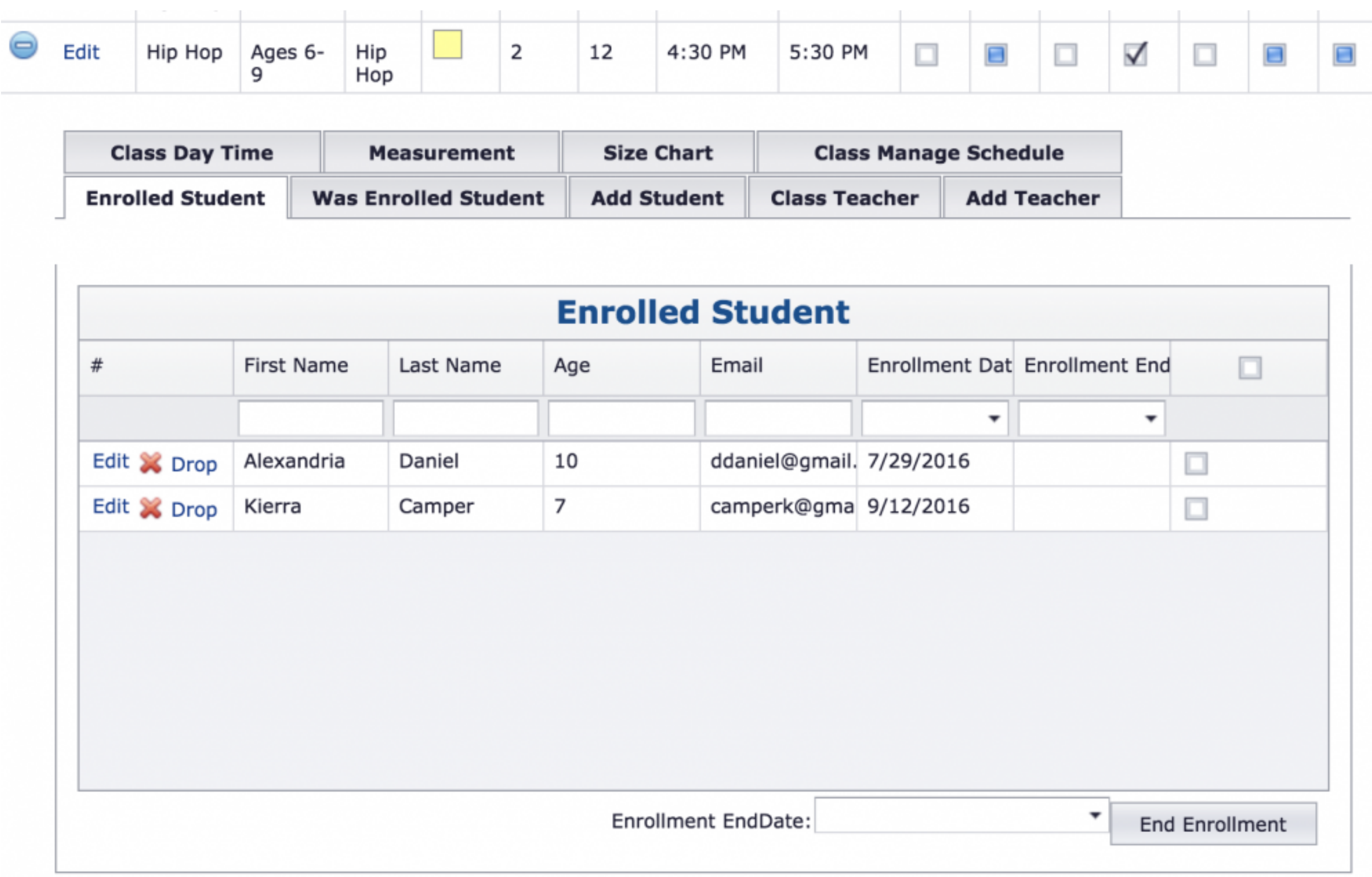
Enrolled Student

This tab lists all students currently enrolled in the class. From this tab you can remove students from the class.

1. DROP – by clicking the DROP link, a student will be completely removed from the class. This means there will be no history saved about the student's enrollment.

2. Edit – Allows you to edit the enrollment dates original input for this student. This is where you change the enrollment date for the student.

3. End Enrollment – This function removes the student from the class but keeps the history of both the date enrolled and the date they un-enrolled. Enrollment history can be viewed from the **Was Enrolled Tab**.

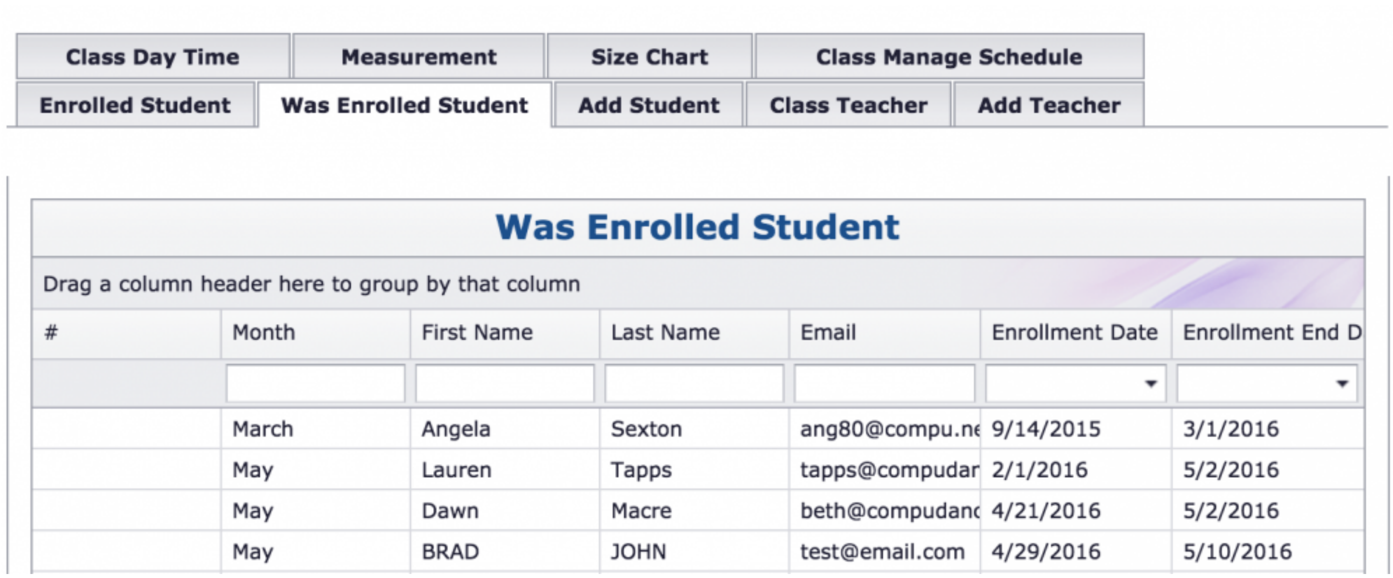


To end enrollment for one student. Select the checkbox to the right of the student's row. Enter the end enrollment date. Click End Enrollment Button. (Student enrollment could also be ended in the Student tab- Enrolled Classes.

If you wish to end enrollment for the entire class, you may select the top right corner to select all students. Enter the last date of class in the End Enrollment date box and Click End Enrollment Button.

Was Enrolled Student

If a student has un-enrolled from a class, the history will be kept. Click the Was Enrolled tab to view the history.



#	Month	First Name	Last Name	Email	Enrollment Date	Enrollment End D
	March	Angela	Sexton	ang80@compu.ne	9/14/2015	3/1/2016
	May	Lauren	Tapps	tapps@compudar	2/1/2016	5/2/2016
	May	Dawn	Macre	beth@compudanc	4/21/2016	5/2/2016
	May	BRAD	JOHN	test@email.com	4/29/2016	5/10/2016

Add Students to a Class

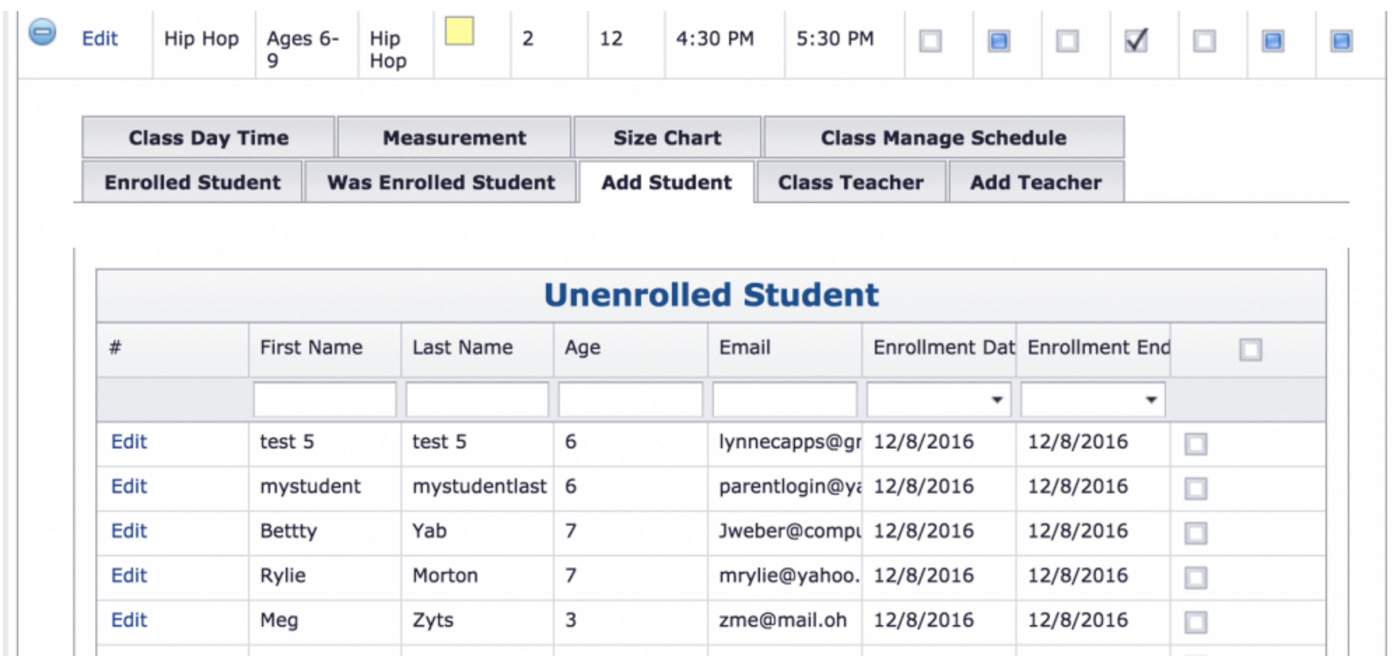
You can Add a group of Students to a specific class

After hitting the plus sign on the class, select the **Add Student Tab**. You will be presented with a list of all active students.

1. Select the checkbox next to the name or names of students you want to enroll in the class. You can select multiple students across multiple pages at the same time. You can filter or sort the students list to find them easily. If you check of a student and then change the filter so you no longer see the student, they will remain checked in the background to be added in a group.

2. Enter the date of enrollment. This date is typically the first day of classes for the season or the day the students marked will begin classes. If the date is after the start of the season, the student will not be on the attendance until the enrollment date. They also will not have calculated tuition for this class if the date range entered is prior to the enrollment date.

3. Hit **ENROLL** Button



Tip!

Search for students quicker by using the search and sort functions

Add Teacher(s)

Each class can only have one main teacher assigned to it but can also have multiple additional teachers.

Main teachers are assigned when the class is created and the class details are entered on the Class Manage Schedule tab

Additional teachers can be added using the Add Teacher Tab under the class. Use the additional teachers to give a teacher access to that class through their teacher portal.

Only the main teacher will be displayed on the main calendar, student rosters and attendance reports.

Private Lessons

CompuDance does recommend you set up your private lessons as classes. You can set up each class individually if it is recurring, or 1 class marked as privates for each teacher.

Class Set up

We suggest you set up a special class type as Private. When a student is enrolled in the Private class, you will see it in their class count number and listed in the enrolled classes.
You could also have Duo and Trio, group class types if you wish. You will also set the Status of this class as **Do Not Show** so only the studio will enroll in this class.

If you wish to allow online enrollment to be offered with a Private Class offering, you can set a ‘Bucket class’ for this offering.

Since most studios charge a different rate from their tuition for the private classes you would not check the Is Billable check box for this class type. If the Is Billable checkbox is not marked, the class will not be included in any tuition calculations.

For Example: If a student takes 3 regular classes and is enrolled in the Private class.In the student grid you will see the Class number as 4, but the tuition will only be calculated on the 3 classes that are marked billable.

Scheduling

Some studios will schedule a **recurring private lesson** for a set time period. If you do this, you can create the class as you normally would and enter the schedule like a normal class. It will be placed on the calendar for the day and time you select.

Other studios will schedule a Private **as needed**. When setting up your private class for an as needed scheduling, you will not check off the day of the week the class will meet. The time range also will not be pertinent.This will prevent any calendar scheduling at this time, but will allow the student to be enrolled in the class for this season.

Scheduling Individual Date Class

When you wish to have this class scheduled, you can go to the Home page/Calendar. Right click anywhere on the background of the large calendar. Click Schedule New Class. Select the season, class and complete the other information. Then click Update.

- The studio will then see the class scheduled on the calendar. It will also be reflected under the class in the Class Day Time tab.
- If you have Teacher portals and the teacher is assigned to the class, they will see it on their calendar.
- If you have parent portals, the parent/student will see it on their calendar.

- The teacher and the student can also have notifications set to alert them of the scheduled class.

Invoicing

Each school invoices privates in different ways. Some may sell them in advance individually or in a package. Some may make them pay at each class. Some may invoice after the class is held. Some may set the price in the Tuition rate.(Flat rate tuition only.)

You can sell the Private lessons in packages or as Punch Card style. In order to do so, you would set up an income category and charge it at the time of the sale.

You can invoice the privates after the fact, by using a different income category other than Tuition. You can do it each date the private is held or in one invoice for multiple meetings. You may use the quantity to set the number of times met in the period entered.

If you wish to invoice your privates in a different way, please call us to discuss your options.

Bucket Classes

A Bucket Class is not an actual class that will meet together. It is a holding spot for a group of students. They can be used for various reasons.

Online Registration Class Status should be Active

- for a type of class so the studio can determine which actual class the student belongs.
- For letting the parent determine if they are interested in being in the Recital (You could also use School Questions)
- If a student will be attending auditions/tryouts.

You can also use them by the studio only for Private classes that do not occur on a regular cycle.

To create a Bucket Class, you will have a class type that is Not marked Is Billable.
Here is a video clip of creating the class.

Make sure the class limit is not smaller than the amount of interest you may have it in.

If you have enrollment into Bucket Classes, you actual classes should be marked as Do Not Show.
Then you will decide which class each student should be enrolled. Add them to that class and drop them from the Bucket.
The parent will be able to see the actual class enrolled in tin the Classes tab.
You could also send out the schedules if you have this option.

Waitlist Classes

If you wish to offer a waitlist for a class, you can!

I would not create them for every class, just the ones that will typically fill fast, or you can wait to create a waitlist once the original class is near or meets capacity.

1. You will need to have a “ **class type** of Waitlist. Do not check off the Is billable checkbox.

2. You will go to the Classes section and find the original Class. Click Add New Class button. Complete the Form for the Waitlist.

- Match the class name, age to the original class.
- Set the Code to Waitlist.
- Set the Class Type to Waitlist.
- Set the Status to Active.
- Set the limit to how big you will allow the waitlist to get.

3. When you click Update you will be brought to the Season Schedule window.
Make sure the Season is correct to the Season the Waitlist.

- If the waitlist will be used to form a different class: the time frame should be the studio hours. Do not check off a day of the week. It will not place the class on the calendar, but still allow enrollment.
- If the class is for this specific class offering in case previously enrolled students are not capable of attending, you can use the specific time frame. I would not check off the day of the week, but you can enter the day in the class name for clarification.

4. Click Schedule

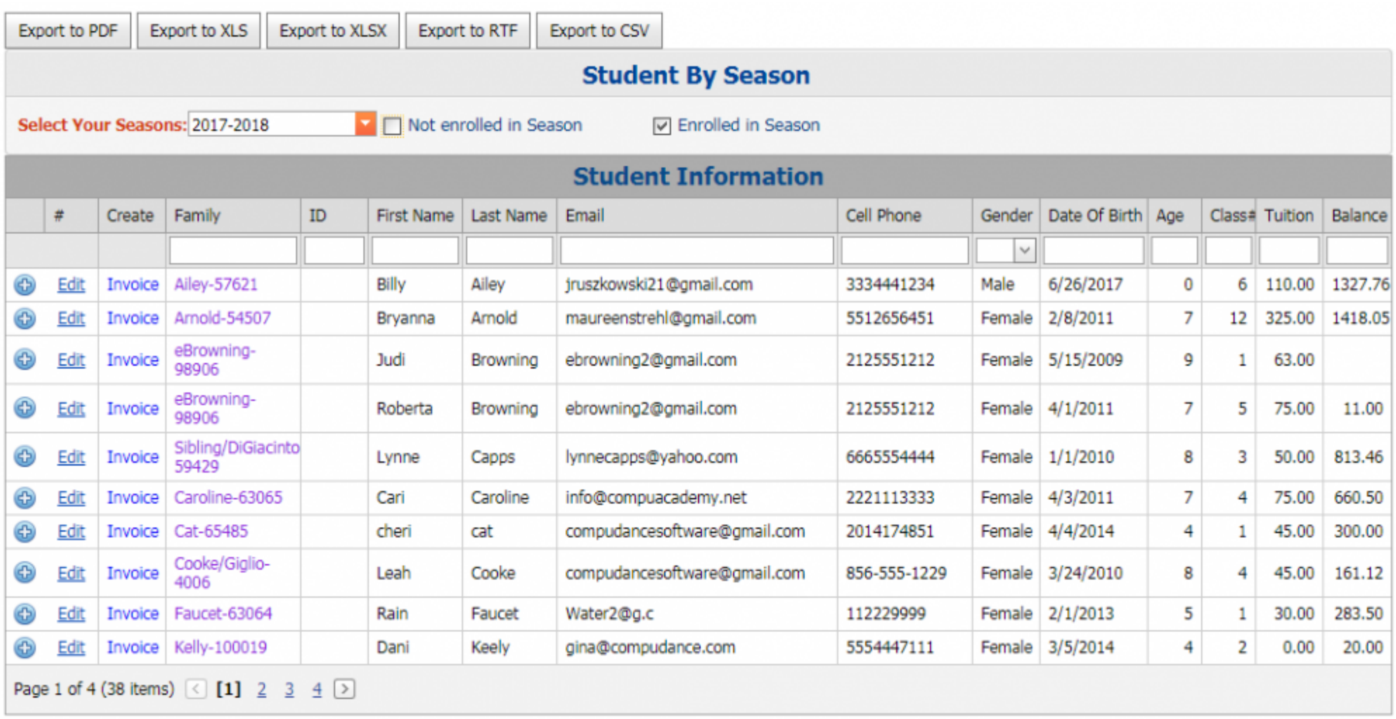
The waitlist will now be available to be selected when the season is opened for enrollment.

The Student-Student Online Register will be able to show you the specific enrollment order of your waitlist classes.

Manage Students

To access students, from Main Menu select Student option

The main student grid displays all active students regardless of season.
You can uncheck the Enrolled in Season box if you want ot see the students who are not enrolled in the season.
You can only check the Enrolled in Season tab to see the students who are enrolled in the season displayed.
This list can be sorted by any column by clicking on the column header.
Additionally, you can search for a student by using any of the white search boxes underneath the column headers.

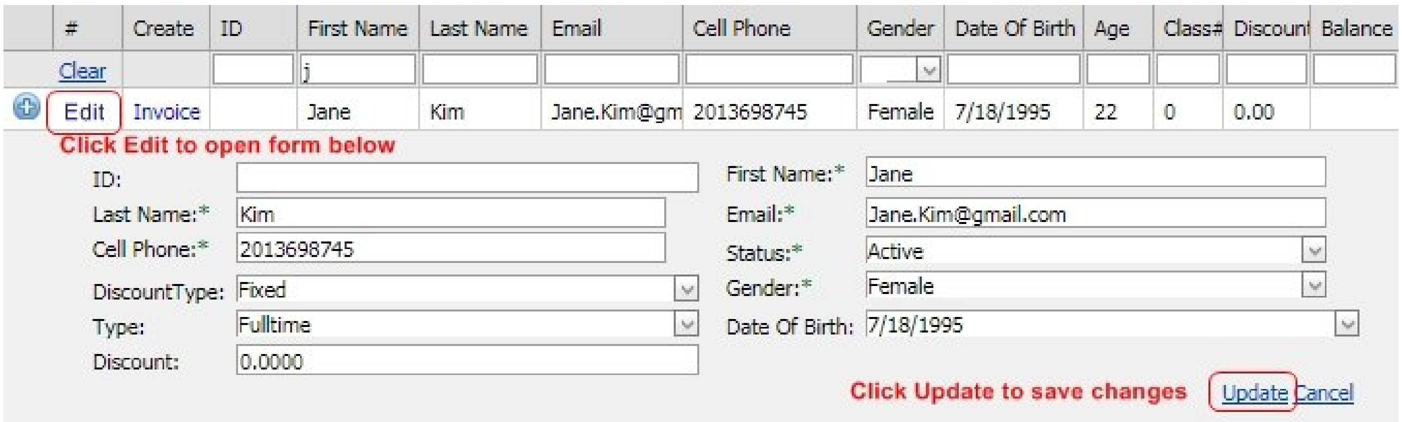


	#	Create	Family	ID	First Name	Last Name	Email	Cell Phone	Gender	Date Of Birth	Age	Class#	Tuition	Balance
	Edit	Invoice	Ailey-57621		Billy	Ailey	jruszkowski21@gmail.com	3334441234	Male	6/26/2017	0	6	110.00	1327.76
	Edit	Invoice	Arnold-54507		Bryanna	Arnold	maureenstrehl@gmail.com	5512656451	Female	2/8/2011	7	12	325.00	1418.05
	Edit	Invoice	eBrowning-98906		Judi	Browning	ebrowning2@gmail.com	2125551212	Female	5/15/2009	9	1	63.00	
	Edit	Invoice	eBrowning-98906		Roberta	Browning	ebrowning2@gmail.com	2125551212	Female	4/1/2011	7	5	75.00	11.00
	Edit	Invoice	Sibling/DiGiacinto 59429		Lynne	Capps	lynnecapps@yahoo.com	6665554444	Female	1/1/2010	8	3	50.00	813.46
	Edit	Invoice	Caroline-63065		Cari	Caroline	info@compuacademy.net	2221113333	Female	4/3/2011	7	4	75.00	660.50
	Edit	Invoice	Cat-65485		cheri	cat	compudancesoftware@gmail.com	2014174851	Female	4/4/2014	4	1	45.00	300.00
	Edit	Invoice	Cooke/Giglio-4006		Leah	Cooke	compudancesoftware@gmail.com	856-555-1229	Female	3/24/2010	8	4	45.00	161.12
	Edit	Invoice	Faucet-63064		Rain	Faucet	Water2@g.c	112229999	Female	2/1/2013	5	1	30.00	283.50
	Edit	Invoice	Kelly-100019		Dani	Keely	gina@compudance.com	5554447111	Female	3/5/2014	4	2	0.00	20.00

This list can also be exported to excel. Click the export to XLS at the top of the page.

You may edit the information displayed by clicking Edit on the student line. A form will appear below it.
Make your changes and click Update to save.

> ✻ [To update an email or mailing address for the family- make the change in the Family link page](#).



Create an Invoice from the Student List.

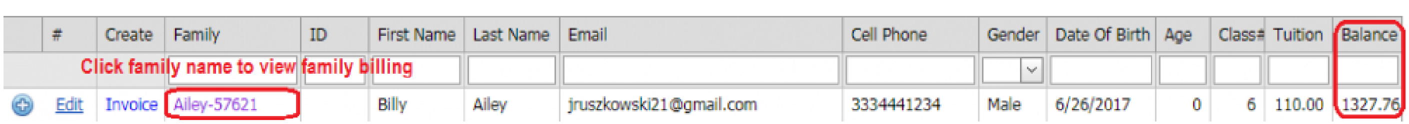
In front of each student is the link for Invoice.
When clicked, it will bring you to [Create an invoice](#) for that student.
You may change the start and end dates, if you wish. Then click Find again.

See the Student Balance in the far right column of the grid.

This will be the balance of all open invoices for the specific student regardless of when it is created or due date.
There is a detail tab to see the [student open invoices](#) under the Student.

View family billing from the student grid.

Click on the family name from the student page to view family billing, post payments and save payment methods.

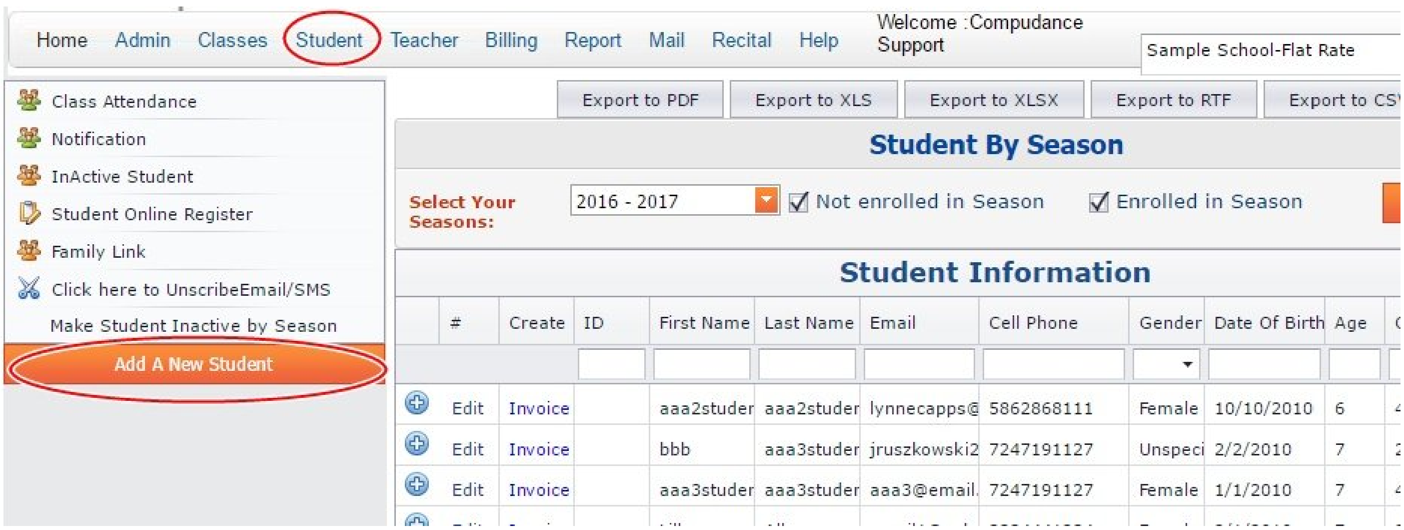


✻ To see any detail tabs for the particular student click the plus symbol in front of the student’s line. (Some systems may show an arrow symbol instead of the plus.)

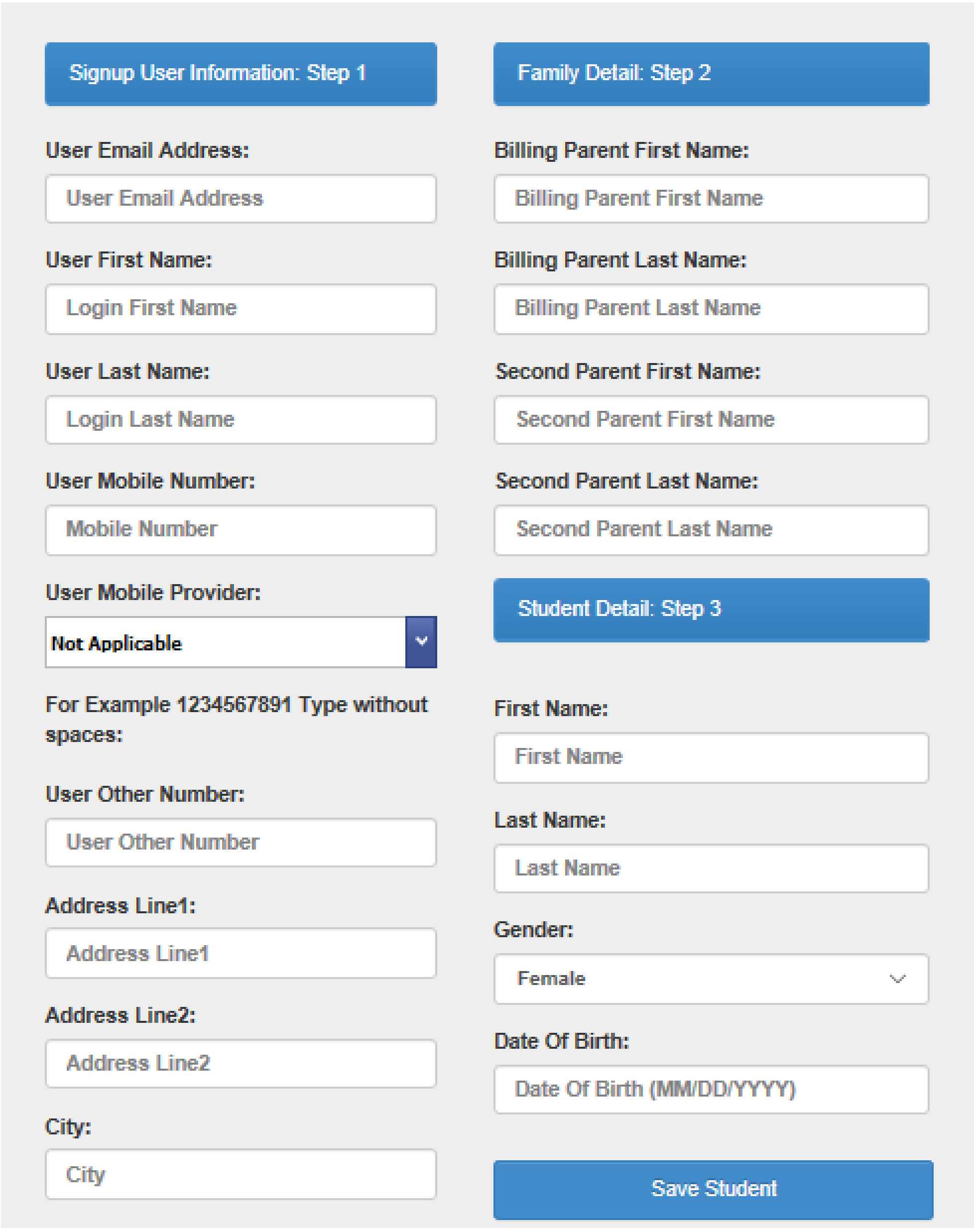
Add a New student

To add a new student in a new family, click on the Add New Student button located on the left-side menu .

! The email address may not previously exist in the system



You will be presented with the following screen.



Complete the form. **Every field is Mandatory** except for the second address line and second billing parent information.

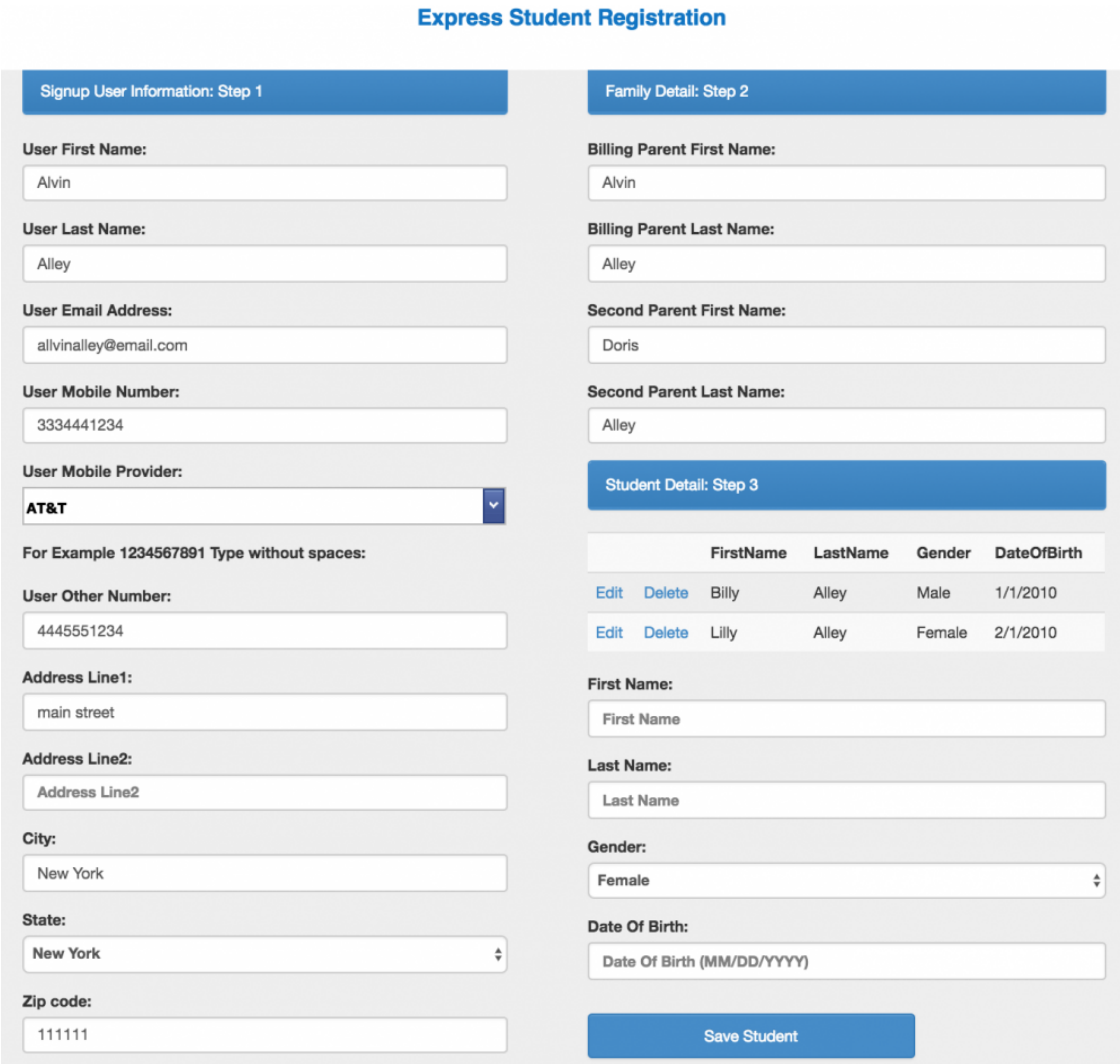
If you don't know the cell phone provider, select 'Not Applicable'.

If you only know one phone number, you can enter it again in Other Number.

The Birth date must be entered in MM/DD/YY format with the '/'

Once completed, click on **Save Student** and you will be asked if you wish to add a sibling.

If you select ADD SIBLING, you will simply need to add the sibling information in Step 3 Student Detail.



When you answer the question *Do you want to Add a Sibling to this family?* as **No** the following will take place as long as the email address does not currently exist in the system.

The student will be created with the address and guardian tab populated. Guardian address will also be set. Student and guardians will start with the same email address.

The Family will be created in the Family Link section with email address and mailing address, students will be linked below.

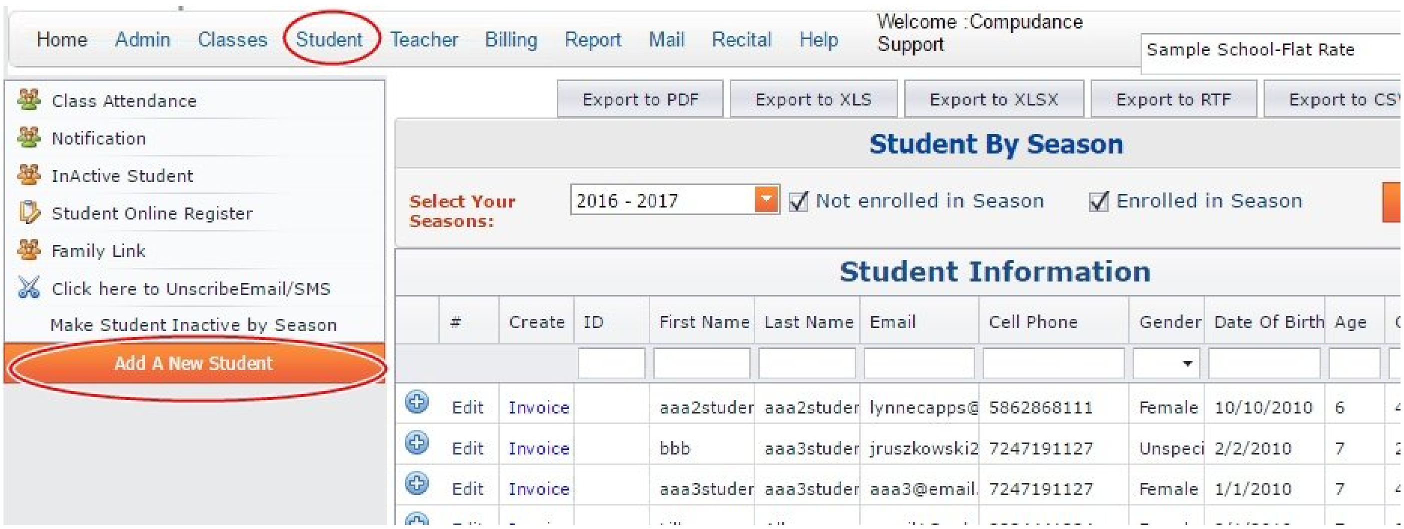
The parent user will be created linked to the students entered. (No email will be sent, studio would have to send if they want parent to access system.Default password is current set as **Dance#16**

Do not use this option if the email address exists in the system. Then you will use the Add Sibling button top right corner..

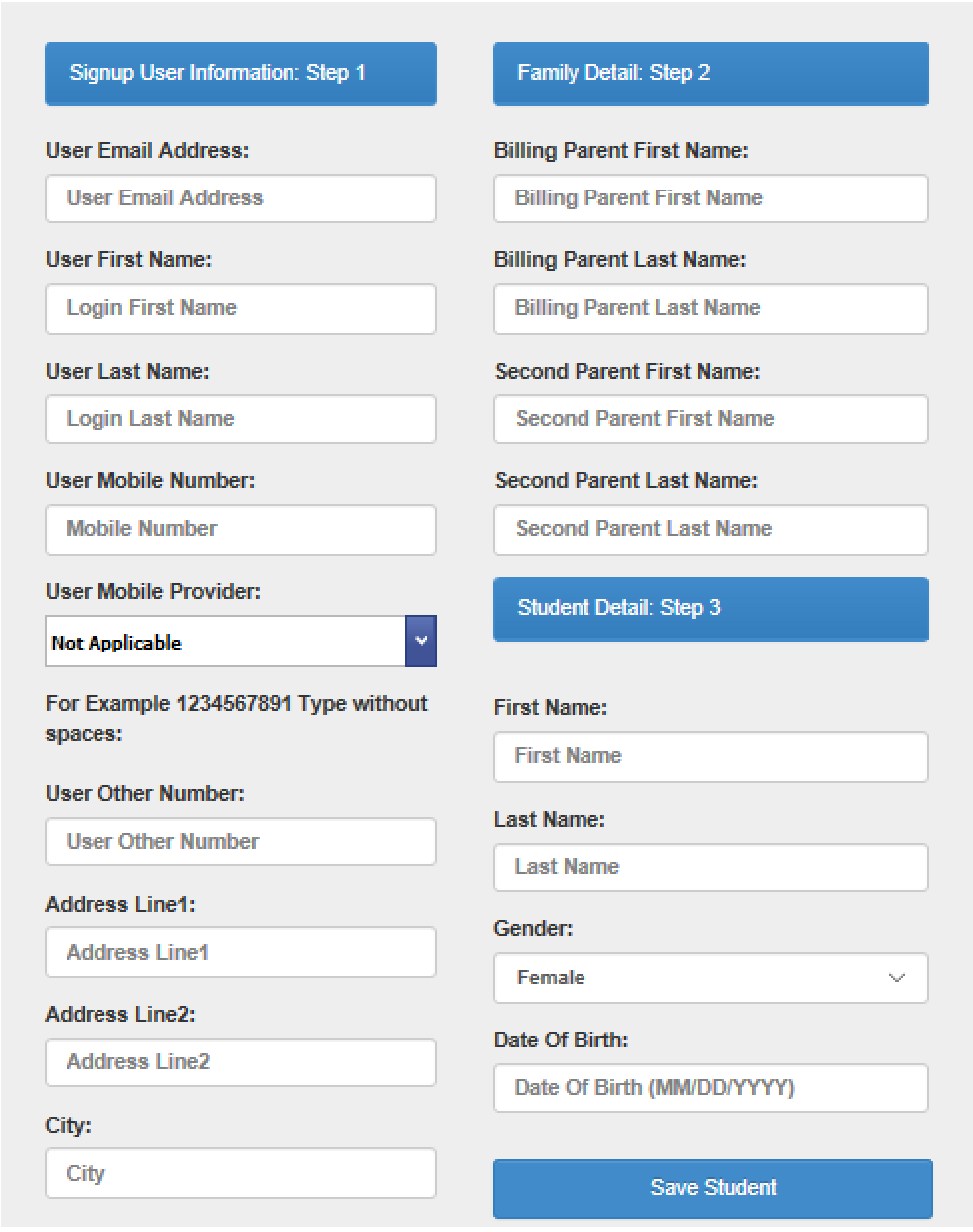
Add a Sibling

When a prospective student already has a sibling registered with the studio, you can add them as a sibling. By adding them as a sibling, the family, guardian information and address information is automatically copied over.
The system will also add the new sibling to the same family link as the other student for you.

To add a Sibling- Go to Student. Then click **Add a New Student** on the left side menu.



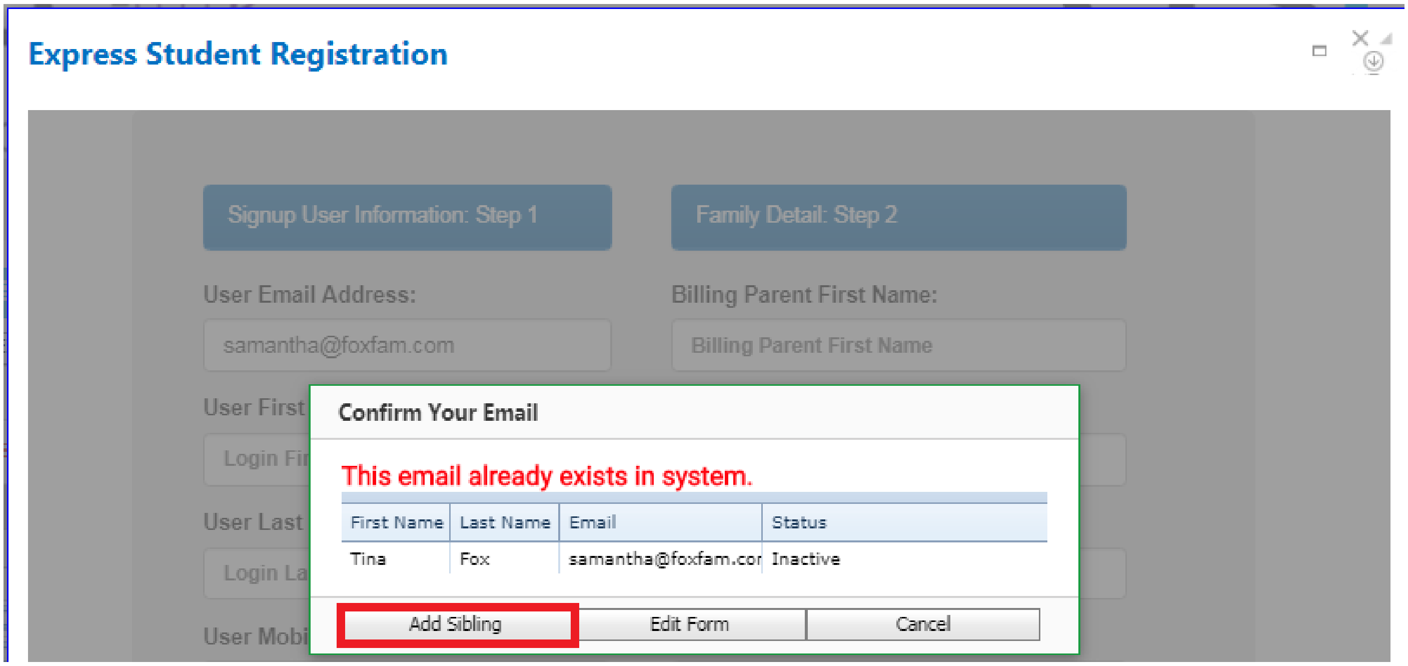
You will be presented with the following screen.



✻ You must enter the same user email address as the initial user that was registered.

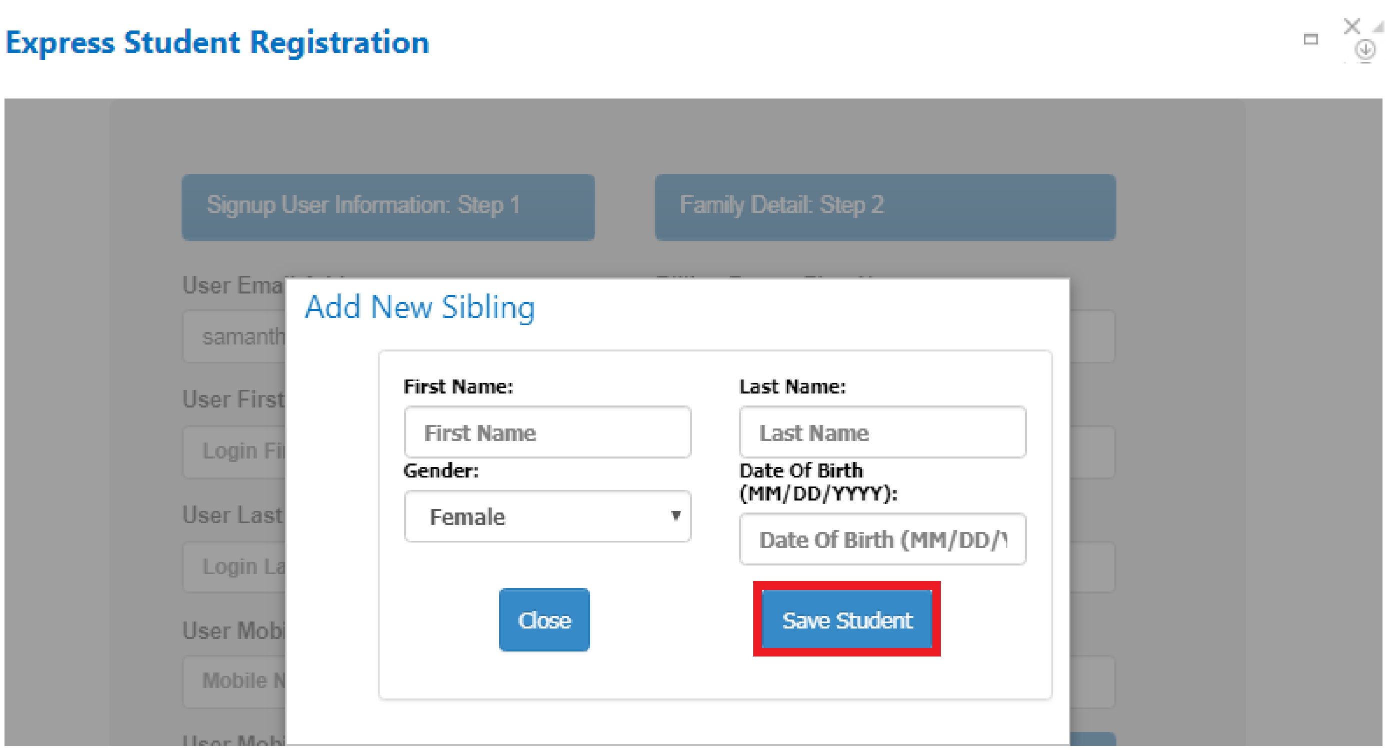
Enter the user email address that was initially registered for the first student.

After entering this field, you will be presented with the following screen:



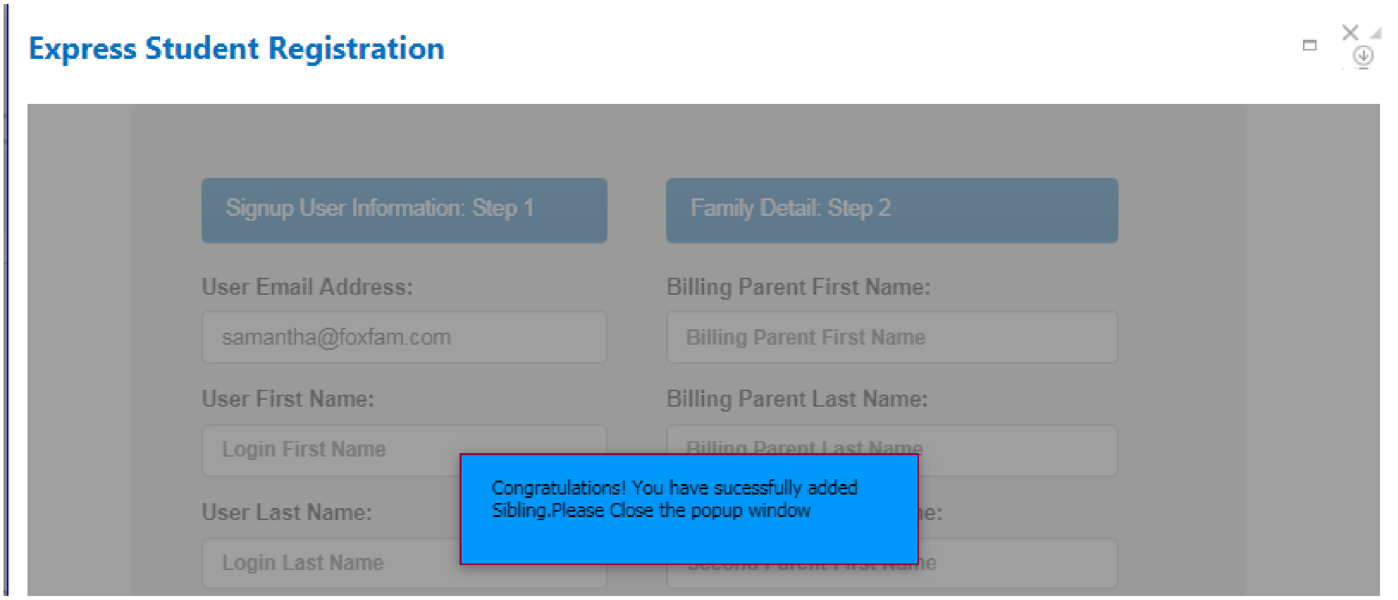
Click the **Add Sibling** button.

You will then be presented with the following screen:



Enter the information and click the **Save Student** button.

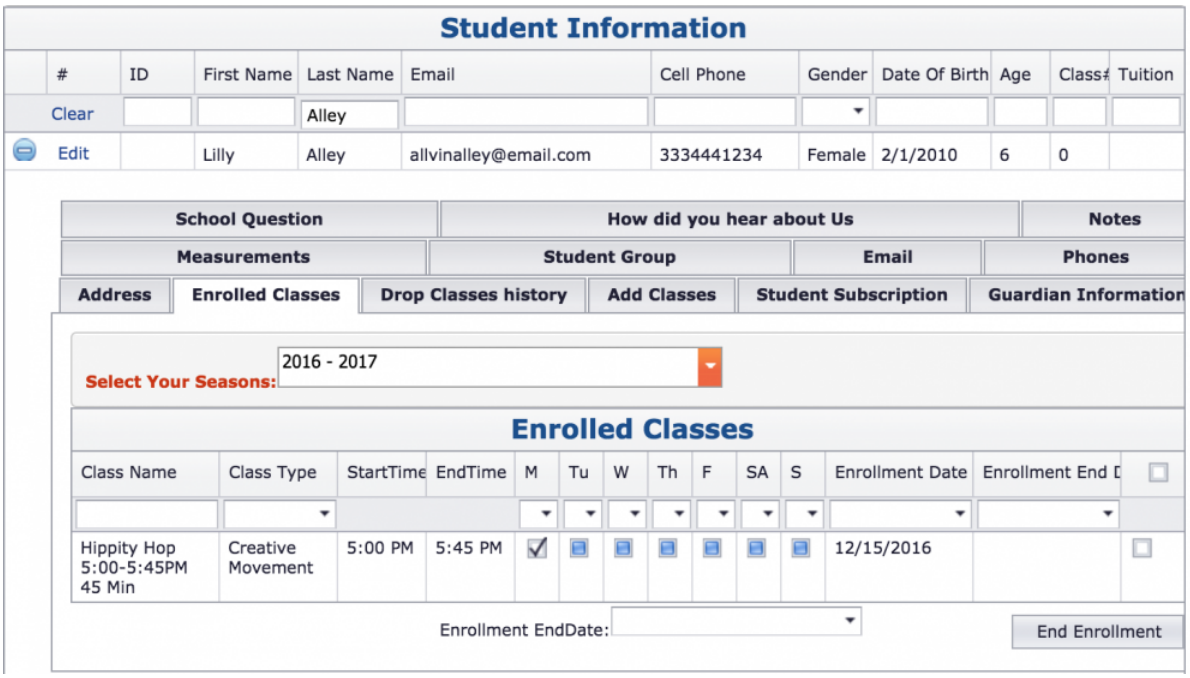
You will then receive the following message:



You may Edit the data after it is saved by clicking Edit in front of the Student information.

Student Data Tabs

Once a student is created, there are multiple tabs within that student for further functions. Click on the plus sign on the student to access the tabs.



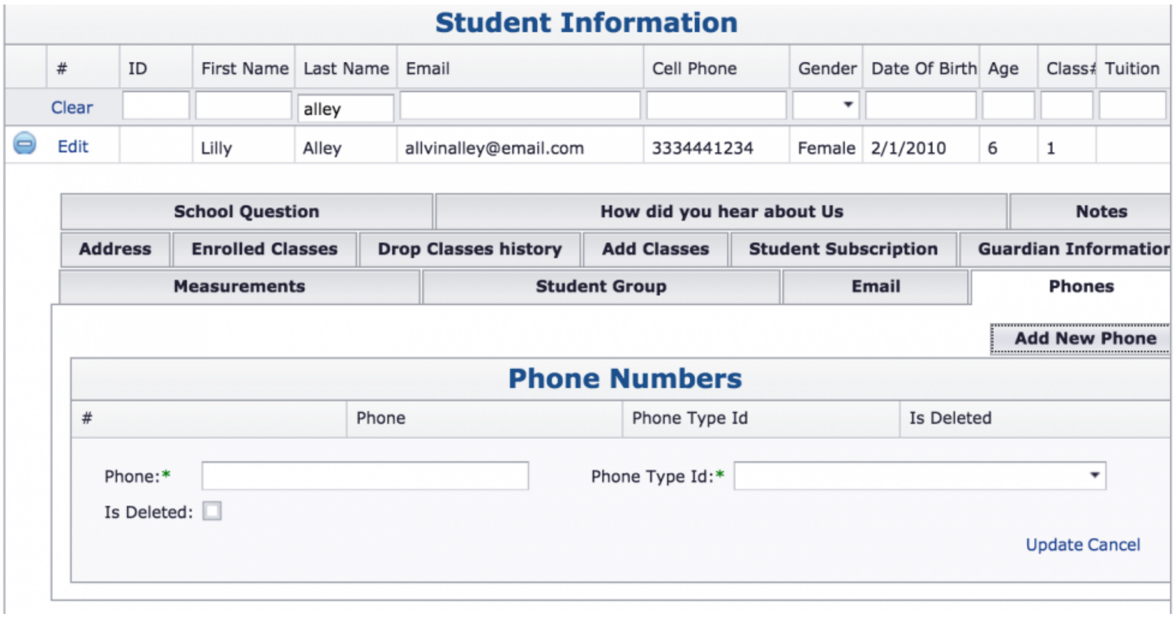
Click on the tab name for more information.

TAB	FUNCTION
Phone	Additional contact phone numbers
Email	Additional Email addresses
Address	Student Address information, can be different than Guardian's address
Guardian	Guardian(s) for the student, can be parents, grandparents, aunt/uncle, etc
Measurements	students measurements for costumes
Add Class	enroll student in class(es)
Enrolled Classes	List of classes already enrolled in
Dropped Classes	history of classes the student un-enrolled from
Student Group	add to any groups set up by the system admin.
Notes	can be any information regarding the student

School Question	questions created by system administrator
Subscription	internal communication
Student Open Invoices	List of all open charges for this student

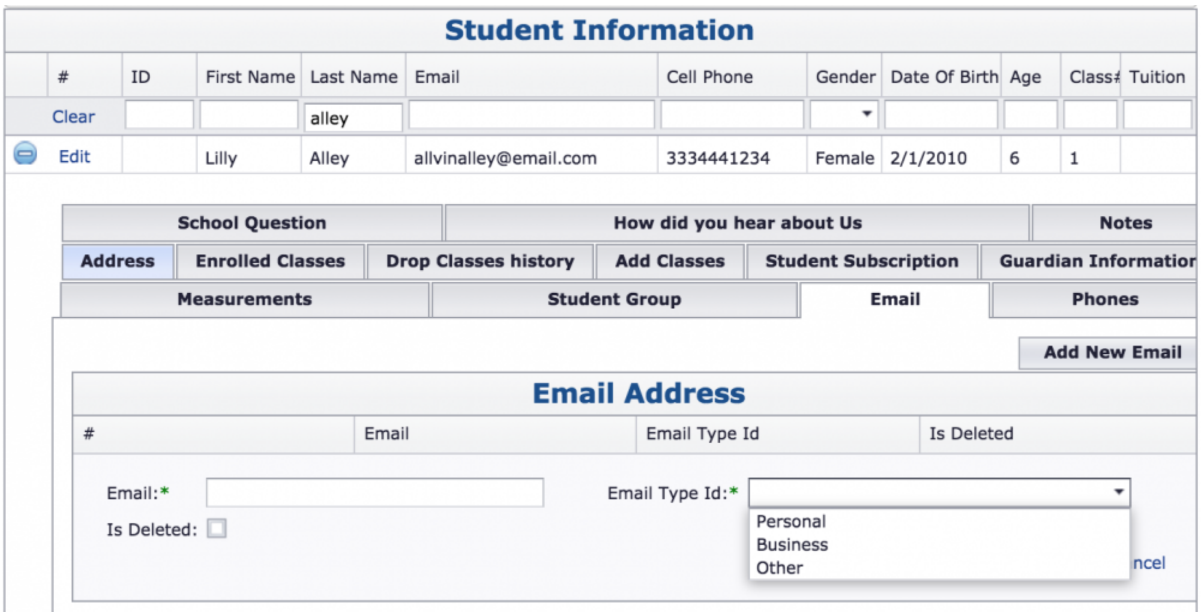
Phone

You may enter as many additional phone numbers as needed.



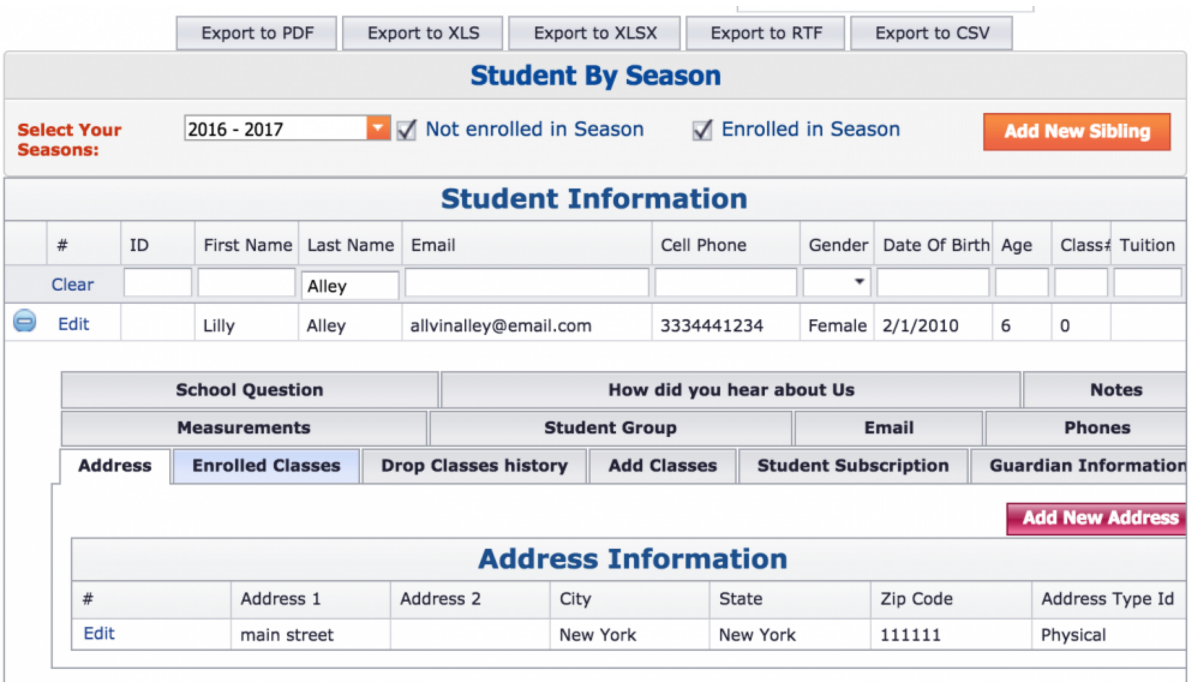
Email

You can enter in additional email addresses. To include these email addresses on an email. Select the user type **Student** when sending an email.



Address

The address tab refers to the student (not the guardian). The student's address can be the same or different than any guardian listed.

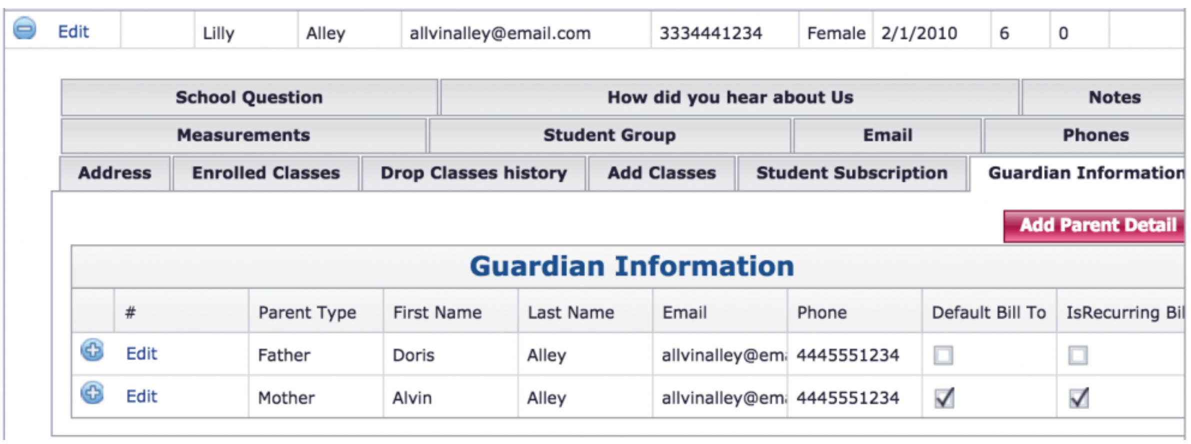


Guardian

The Guardian tab lists the responsible billing parties for the student. You must have at least one guardian but can have as many as needed.

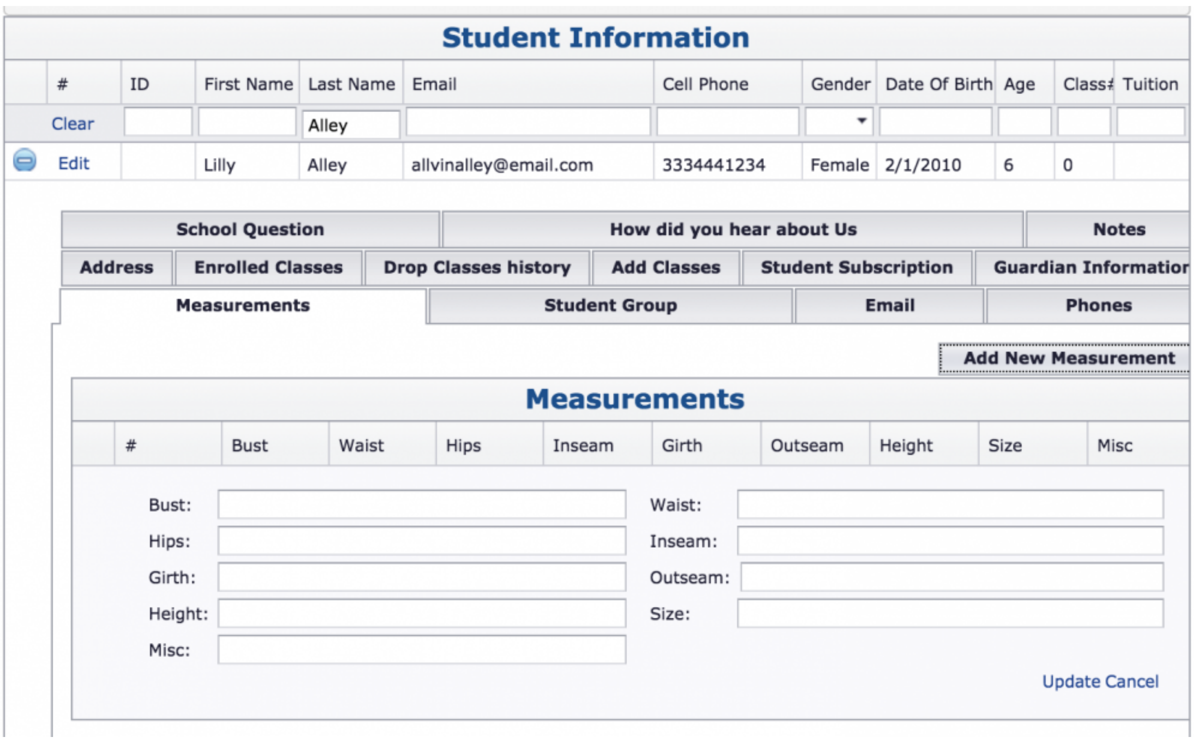
Each guardian can have different address, phone number(s) and emails(s) from the student or any of the other guardians listed. If the student is an adult, the guardian can be themselves.
To see the Address, Phone and Email tabs for a guardian, click the plus in front of their name.

One guardian needs to be marked as the 'default bill to person'. This is the main person responsible for payment. When posting a payment, this person can select a different guardian for that payment



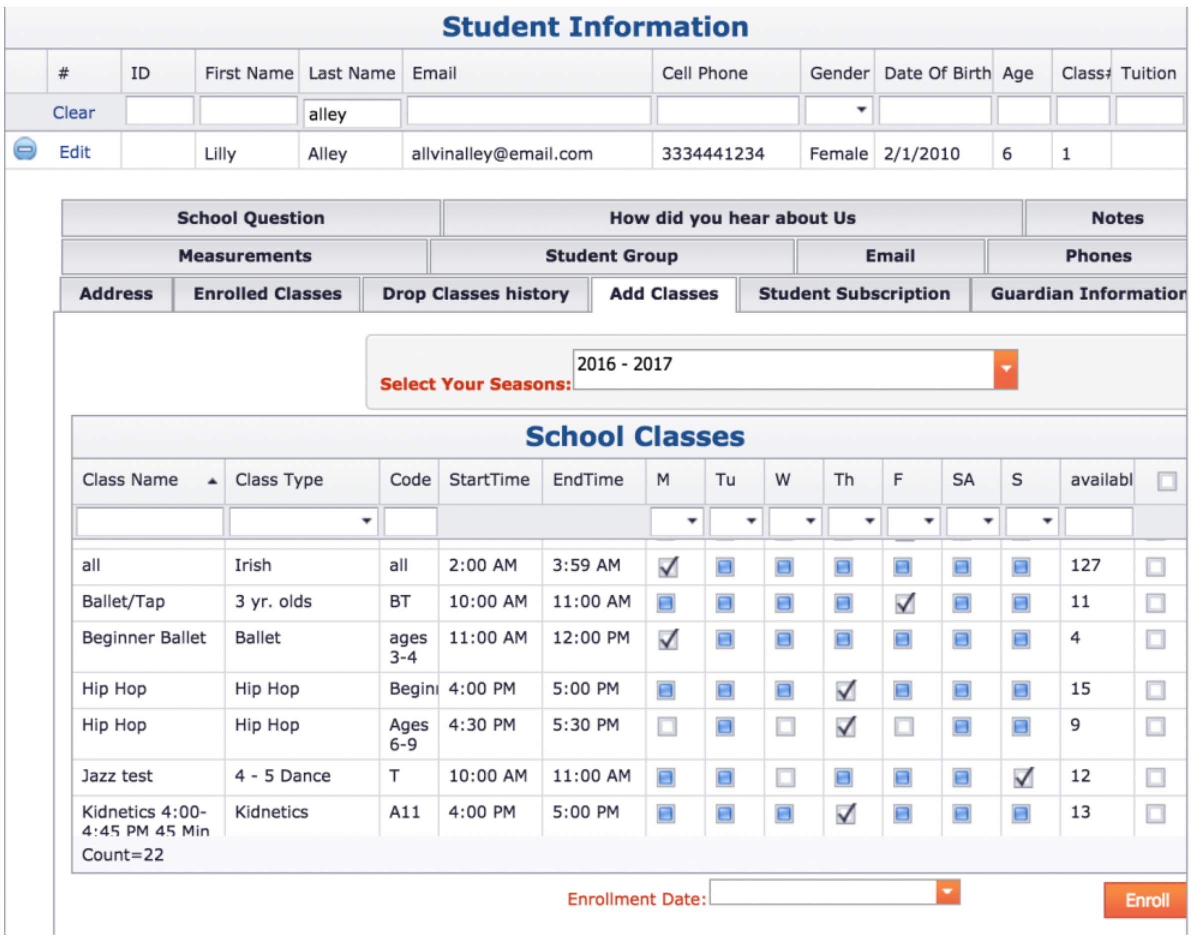
Measurements

Measurements are entered by the studio. They can be entered on the student record or also from the class measurement tab. Auto-sizing function is found under the Class Measurement Tab.



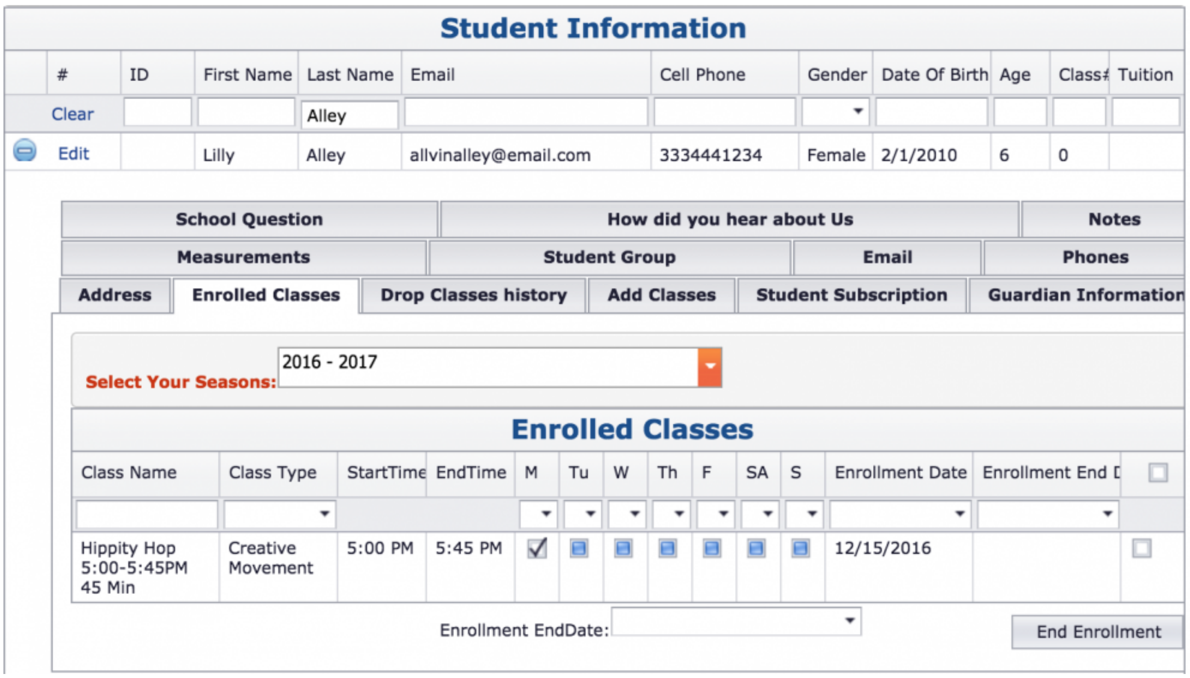
Add Class

A student can be enrolled in one or multiple classes at the same time. Select the Season with open enrollment. A list of classes will be displayed. Click the checkbox one the row of the desired class or classes. Enter the date the student is enrolling in the class. Lastly, hit the enroll button to complete the enrollment.



Enrolled Class

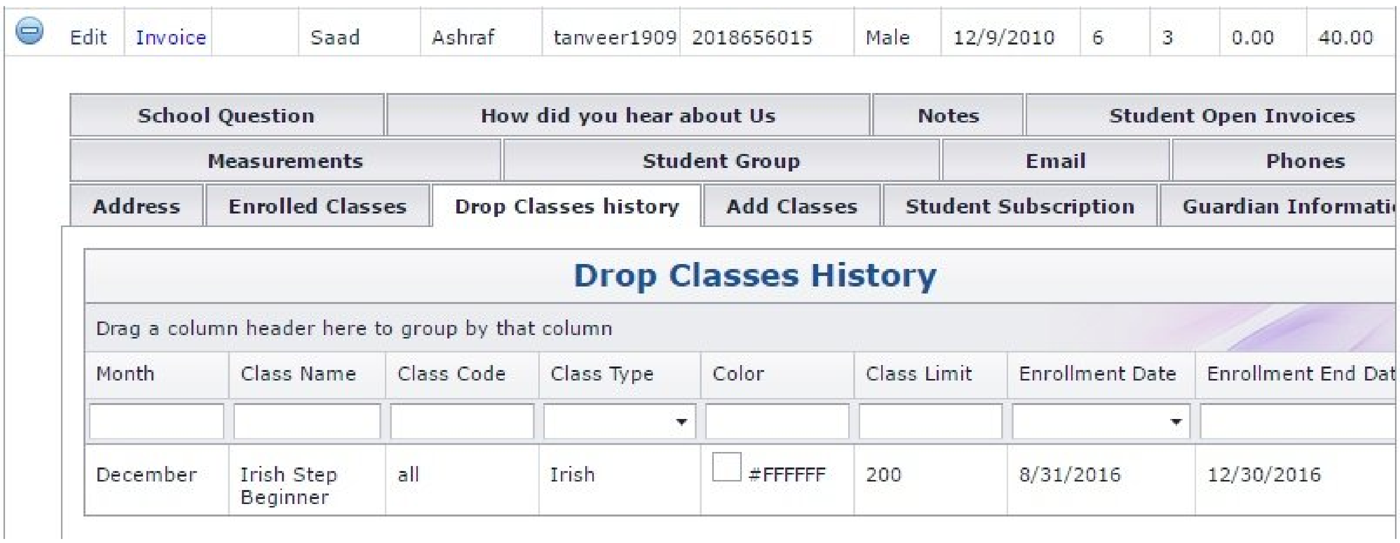
The Enrolled Class tab lists the classes a student has registered for. To view the list, first select the appropriate season (it can be a past or future season).



From this tab you are also able to un-enroll a student from a class. To un-enroll, click the checkbox for that class. Enter the date the student is un-enrolling and click the unenroll button. This will remove the student but keep the history.

Dropped Class/History

If a student ends their enrollment from a class, that history is saved.
To view the history, click on the Dropped Class History tab.
The end of enrollment could be because the season has ended or if the student leaves the class early for some reason.



This list can be used to decide if a student qualifies for a new class or group or if they have a history of dropping classes.

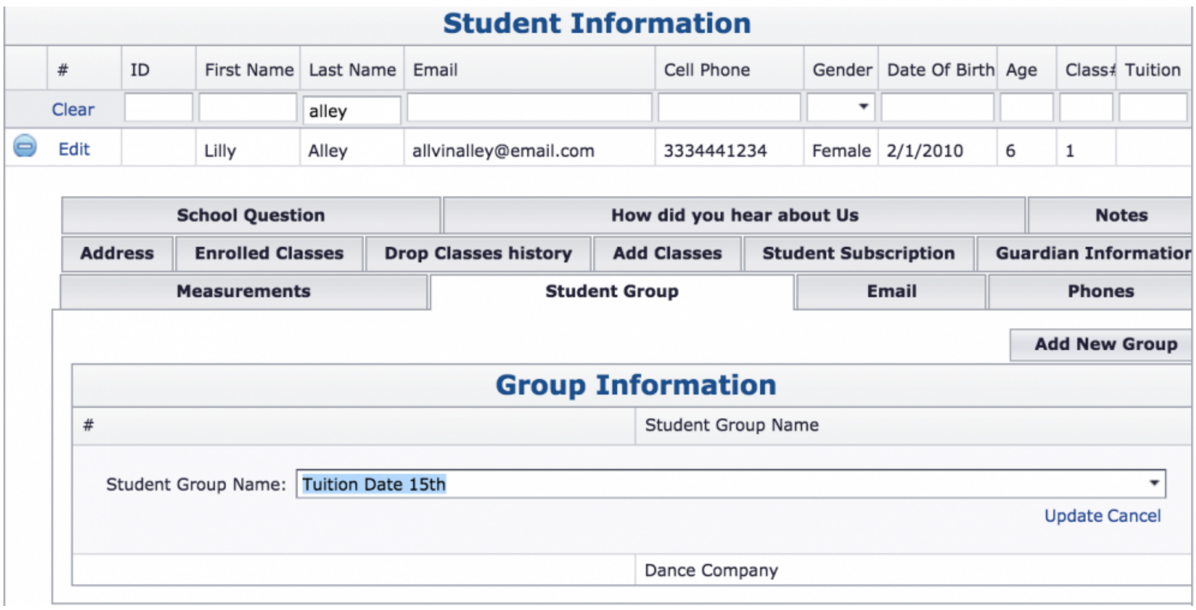
If the studio uses the Drop option under the Class in the Enrolled Students tab, the history will not be saved. This option should only be if the student was placed in a class incorrectly.

Student Group

Groups are created by the system administrator under the ADMIN section. Groups can be used for billing and emailing purposes.

To add a student to a pre-arranged group

Click the Add New Group button
In the form, select the group from the drop-down menu.
Click Update.



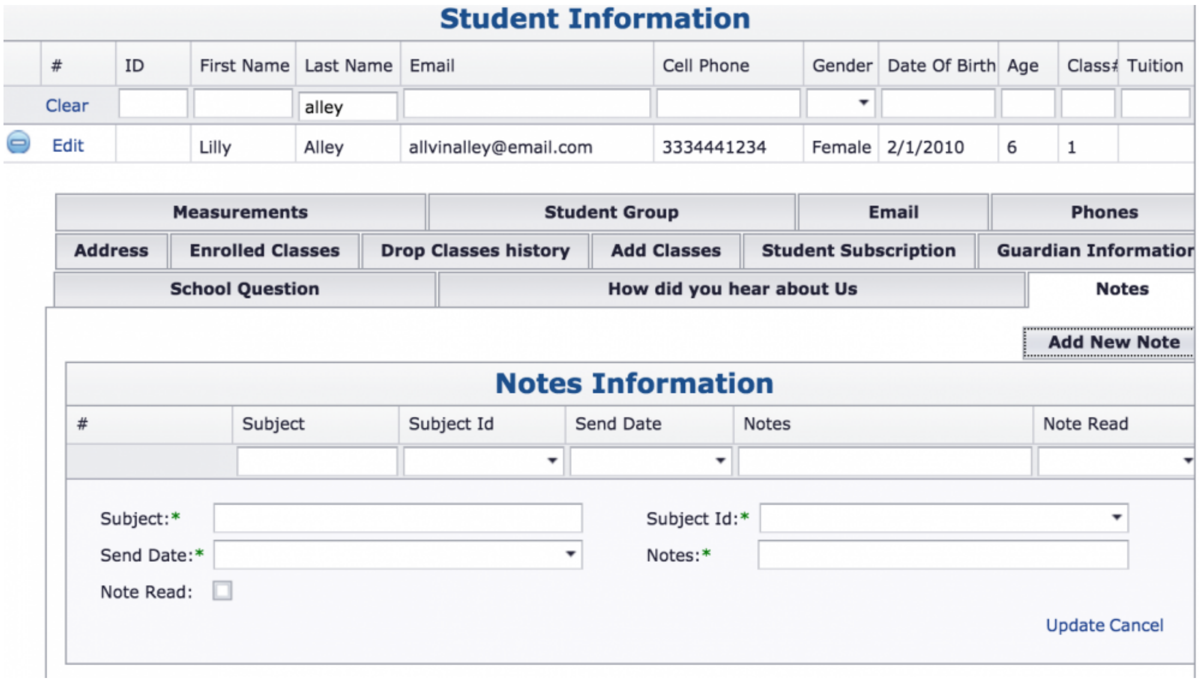
To remove a student from the group, you need to go to the [Admin-School Setting Types-School Group tab.]

You may also add multiple students to a group in [Admin-School Setting Types-School Group tab]

Notes

Notes is a place to keep track of information regarding that specific student.

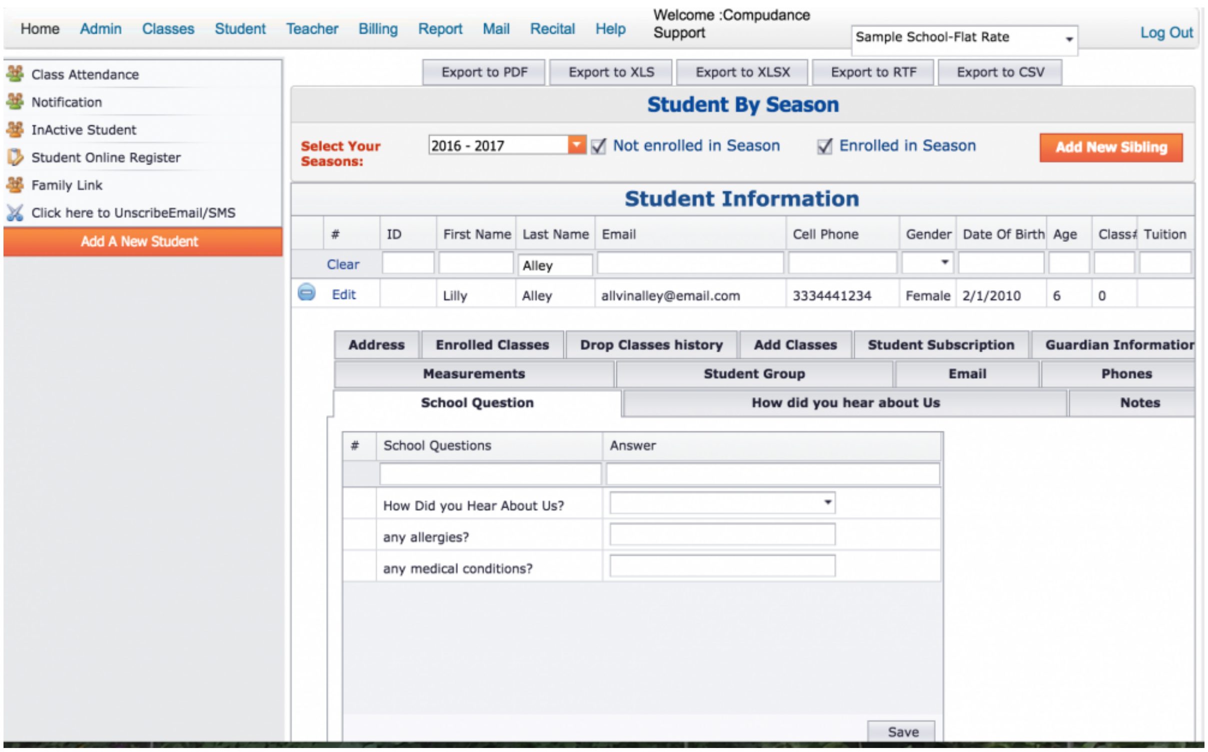
To add a note, click the **ADD NEW NOTE** button and fill out the fields.



School Question

A studio can setup specific questions they would like to know about their students. The actual questions are created under the ADMIN section. On the student, you will be entering in the student's answers to the questions.

To answer questions, simply type in the answer or select from one of the pre-filled answers from the drop down menu.



Student Open Invoices

You can now see the balance of a student account in the student grid.
If you click the plus sign for a student, there is a tab called Student Open Invoices.
It will display the charges that make up the balance total.
You may click on the Pay link to be brought to the View/Pay Family Invoices for this student.

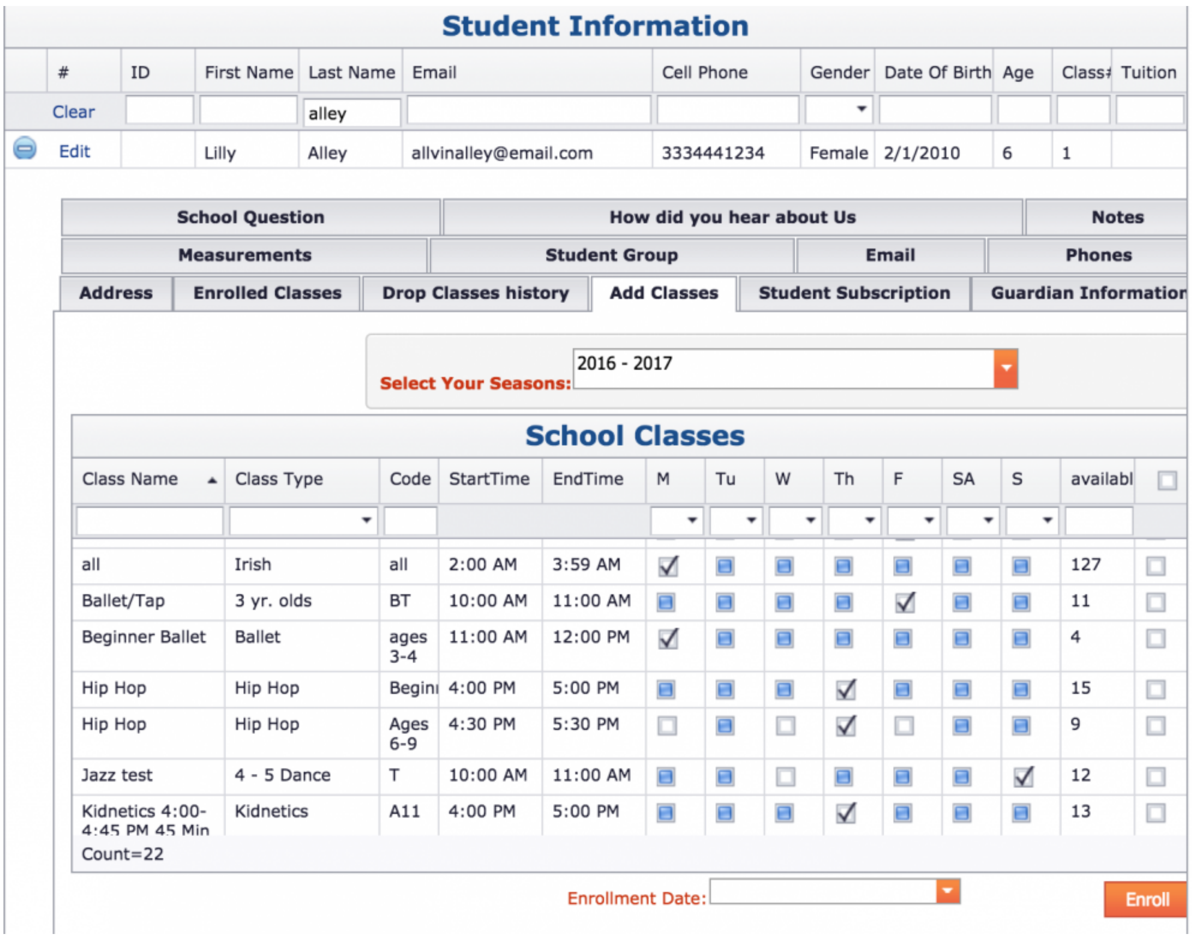
If the student does not have a family, the system will prompt you to create one.

> ! If you are brought to a family but do not see the open invoices for that particular student, the student is missing a guardian on the Student-Guardian Information. Add one for the student to see these invoices under the Family Invoices.

Subscription

Enroll Students in Classes

A student can be enrolled in one or multiple classes at the same time. Select the Season with open enrollment. A list of classes will be displayed. Click the checkbox one the row of the desired class or classes. Enter the date the student is enrolling in the class. Lastly, hit the enroll button to complete the enrollment.

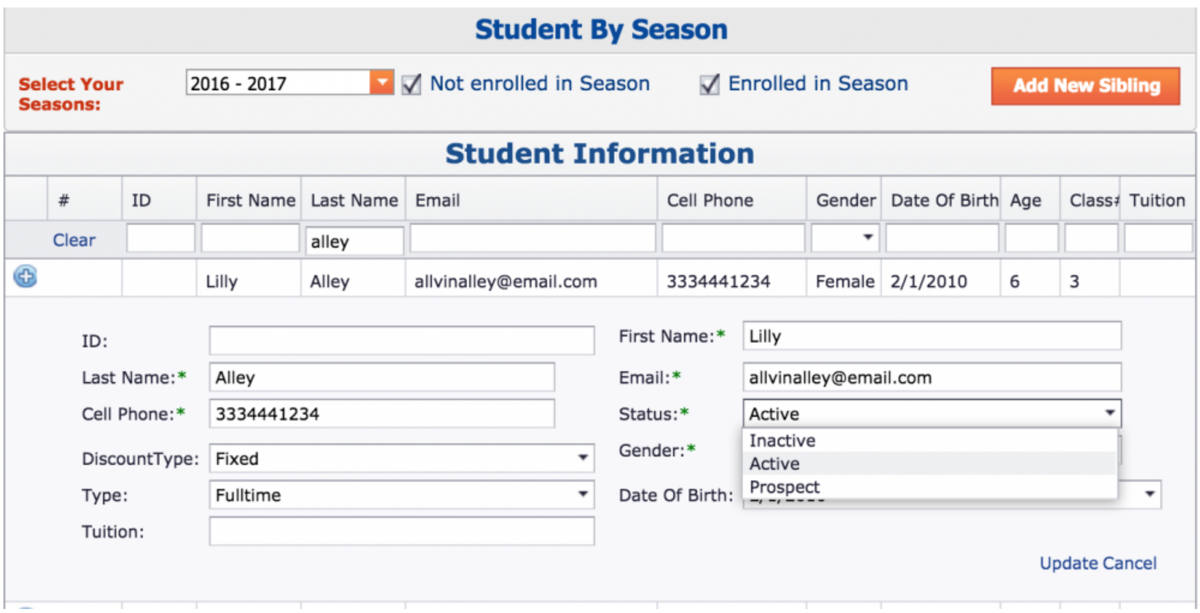


Make a Student Inactive/active

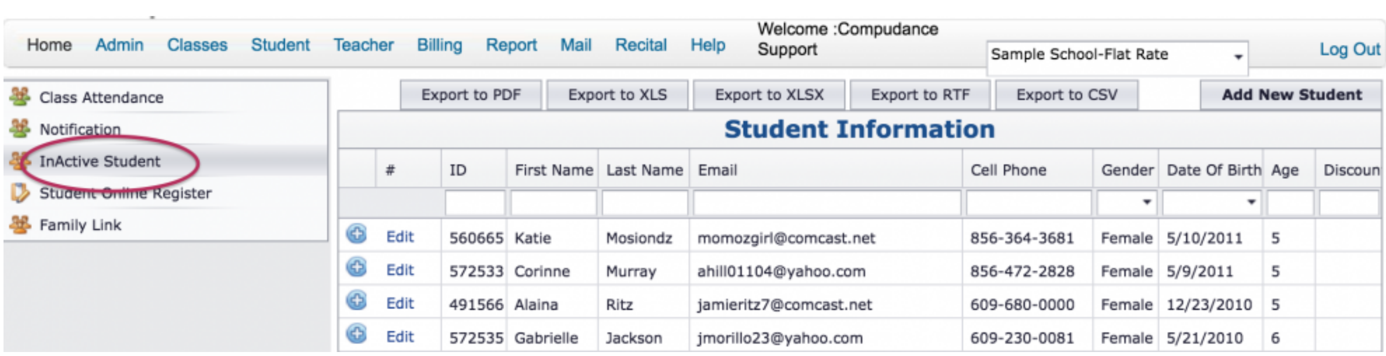
If an individual student is no longer with your studio, you can change their status to INACTIVE. This keeps the history of the student including billing and class enrollment but it removes their name from the active class list.

You can also make a group of students inactive if they are not enrolled in a class all at one time: see [Make Student Inactive by Season.]

To make a student inactive, hit EDIT on the student. In the status field, change the status to inactive and hit update to store the change.



Once a student is made inactive, you can access them from the Inactive Student Menu. GO to Student menu and select Inactive Student from the left side menu.



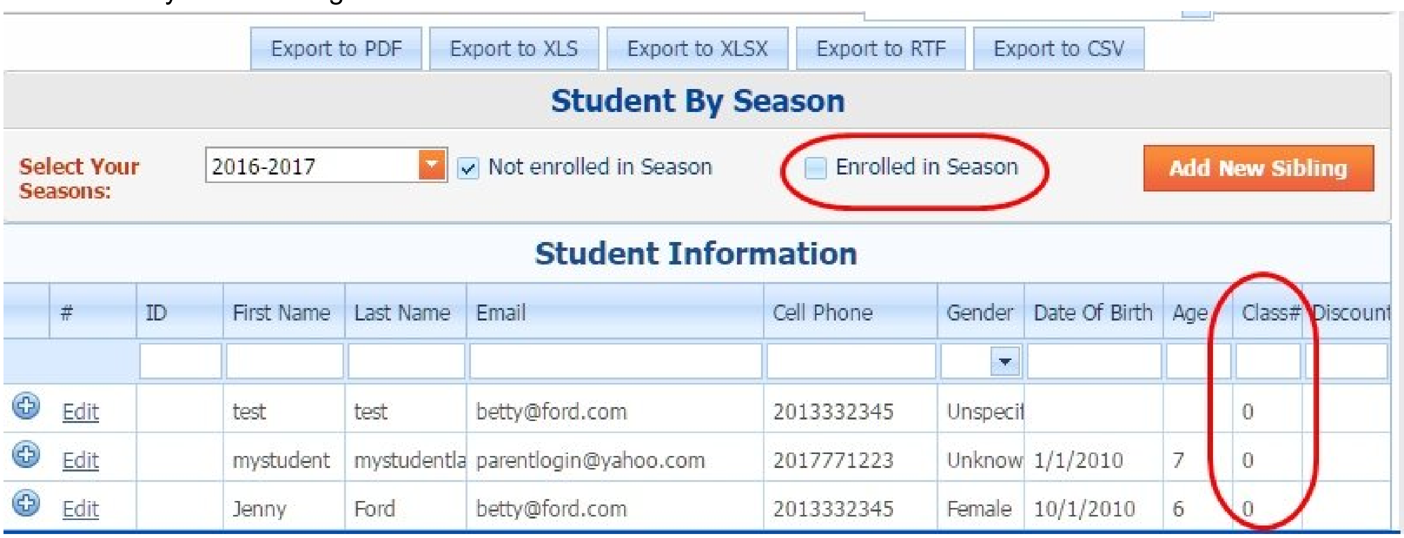
You can make a student active even after they have been made inactive. You would do that by clicking edit on the student and change the status from INACTIVE to ACTIVE. That student will then appear in the active student list.

> ✻ When a studentis marked as inactive, you still have the ability to contact them in emails or text messages. You can turn email and text communications. See Unsubscribe Email/Text

Make Student Inactive by Season

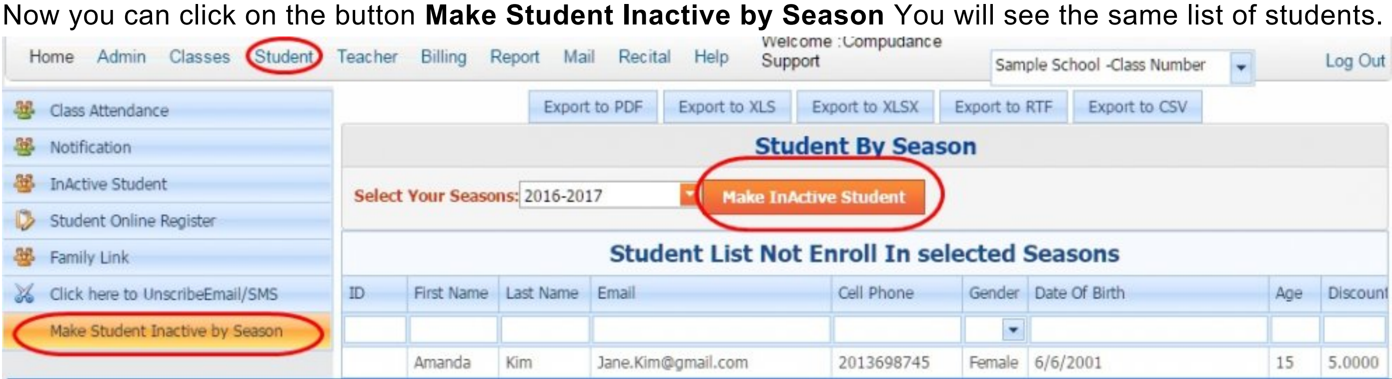
This feature will allow the studio to Inactive all Students who are not enrolled in the default Season.

First we recommend you review all of the Active Students who are Not enrolled in the Season. To do so, Go to Student.
The season you are brought to is the default season. Uncheck the Enrolled in season box.



You will see the list of students who are currently marked as Active, but are not Enrolled in this season so Class # is Zero.
If the student is supposed to be in a class, please enroll them. You can not create an invoice for a student if they have not been enrolled.

Now you can click on the button **Make Student Inactive by Season** You will see the same list of students.



Click the Orange button Make InActive Student.

You will see a popup box asking for Confirmation “Do you want to make Inactive Students?”
Click OK to complete the process.
You will then be displayed the list of Inactive Students.

> When a student is marked as inactive, you still have the ability to contact them in emails or text messages. You can turn email and text communications. See Unsubscribe Email/Text

Family Link

The Family Link

The **Student-> Family Link section** is where the system will connect all of the members of a family.
The Family Link page is also where the information is used for Family Statements. The Email address the statement is sent to and the first name and last name of the person it is addressed to with the address . **To edit any of this information click Edit.**

The Autopay Type flag – This flag will be triggered when an account is on file just to control the payment tabs in View/Pay Invoices and Family Invoices by the studio and the parent. It will not control the Autopay feature for the family or remove a previously saved account. See below.
The Colors represent the Autopay Type – ACH account Credit Card None No Type selected

Most of the time, the studio will not have to link students to a family themselves.

- If you enter the students together in Add New Student form and answer yes to "Do you want to add a sibling?"
  The Students will all be made into a family under the_ Billing Parent's Last Name_ . (You can always edit this after it is created.)

- If you are adding a sibling to the system of a student who was previously entered, you should use the same email address for the new student.
  The system will then copy the address and guardian tabs. It will also add the new student to the same family of the existing student and add the new sibling student to be accessed by the same parent logins as the previously entered student with that email address.

If a Student is not appearing in it's family or in the wrong one

1. Go to the Family Link and find the family the student should be associated with
2. Click the plus for the detail tabs
3. Go to the Add Sibling Student tab (2nd tab)
4. Find the student to be *moved* to this family. Check the box on the right.
5. Click Link.

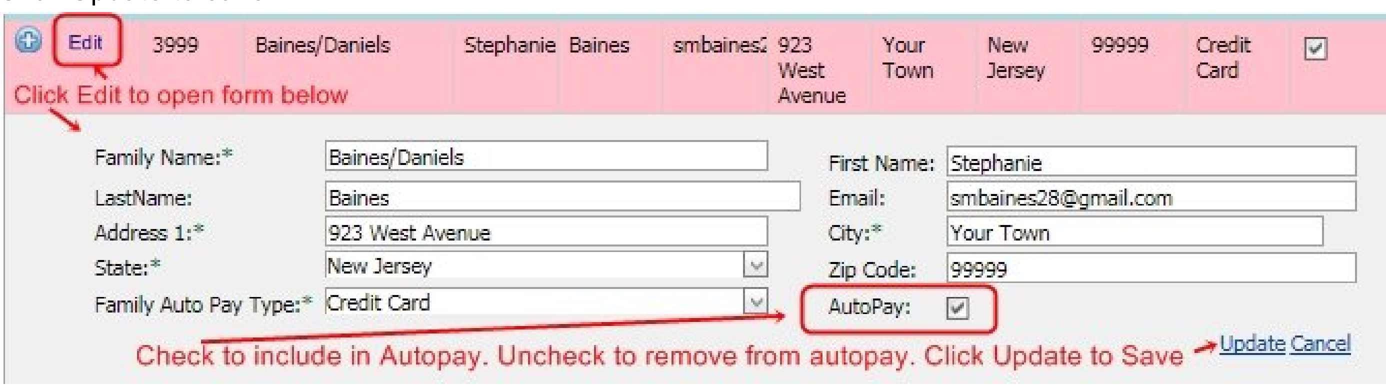
If the student was in a different family, it will automatically be moved to the new one.
You can view the family in the Student Sibling tab
It will show the student guardians, then click the plus to see the Students.

To Add or Edit and existing Payment Account on file

The Studio may need to edit this information. (It is actually saved in the Payment XP system, not CompuDance.)
If you are Adding or changing the type of account (Credit Card or ACH) for the same type of account, you may go to that payment tab.
Click Edit and correct or enter the information. Then click Update.
If PaySafe approved of the information entered, you will see the *** information updated.

The studio may turn on/off a family's Saved accout from Autopay.

If the school has the autopay feature turned on for the school, you may now individually control which families have the autopay function run when one of their invoices are scheduled. Therefore, you may let a family save a payment account and not include them in autopay. (You can also give this on/off ability for the parent to control.)
To edit the autopay option, Go to the Student- Family Link page.
Find the family. Click Edit to open the form.
Check the Autopay checkbox to include this families invoices in autopay.
Uncheck the box to remove from Autopay. The payment account on file will still be saved.
Click Update to save.



If you need to Remove or change to the other payment type

You will need to remove the information first from the PaymentXP system .
Follow these directions, also found in the Left side menu of Family Link.

> ! Do Not just Delete the family in Payment XP system, it will retain the information and could still process the payments through.

Updating Contact info for Family

Updating Email addresses for Entire Family
Now, when you go to the family link, edit a family, change the email address or mailing address information, the system will ask you if you want the new information to be updated for the members of the family. If so, it will change them at that time.

Here to see a video on how it works:

! **The User account login email address will not be affected by this update**. If the user login should need to be changed to a new email address, please go to Admin-User and edit the parent account to the email. You must also notify the parent user of the change.

Birthday Search

Are you interested in finding all students with a birthday in a specific month?

We have several ways to see your birthdays.

If you want to simply see a list of all birthday students for a display in your studio and you use a US date format.
Go to Student and enter the numerical month in the date of birth column. (Use 1/ for January, 10 for October)
The list will filter for all students within that birth month.

You can also run the " **Student Detail Report** will supply the student address and classes enrolled if you wish.
This report allows you to sort by the birthday.

> ✻ It will be displayed in MM/DD/YYYY format for all schools, regardless of US or european date format.

We also have an email filter set for any students with a birthday today in Mail-Express Message.

We recommend exporting the report if you want to make labels for a certain set of students by their birthday.

Active Student List

You can export your active student list at any time.
This will allow you to print the active student list.

Go to Student on the top menu
Click Export to XLS – this will create an excel spreadsheet of your currently active students.
_You may filter or change the sort prior to exporting. _

A student can have an active status but not be enrolled in a class.

Excel or Numbers can open an XLS file.

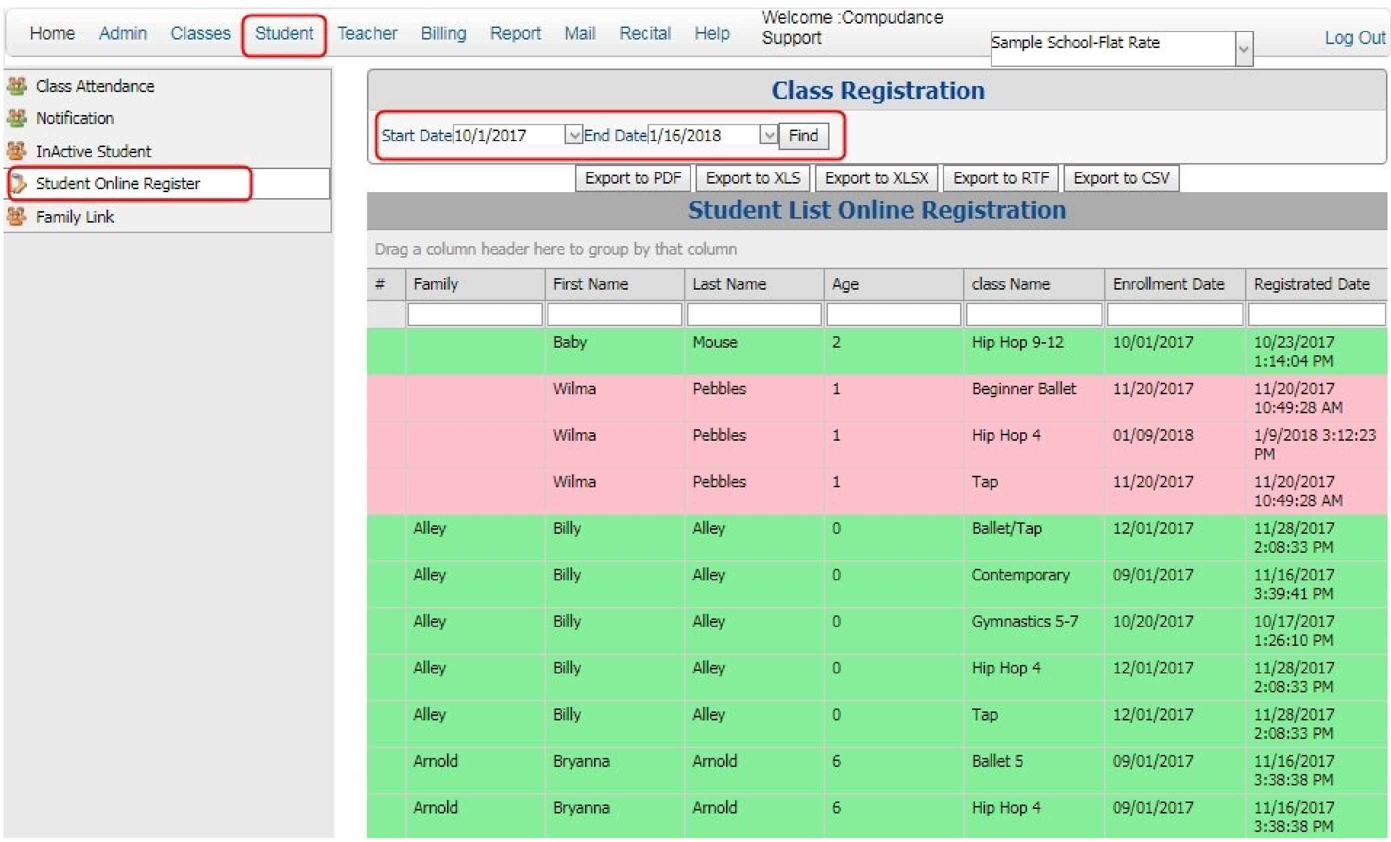
You may delete or hide columns you do not want.
You may filter or change the sort of the data. Then click Print in the spreadsheet application.

Student Online Register

The Student Online Register will display the Class Enrollments in a given time frame.

You need to enter the Start and end date to see all enrollments for that school in that date range.

The default sort is by family name, then student name.
If the lines are pink- the student has an inactive status. (The system allows a customer to register a student who is inactive.)
If the lines are highlighted green the student has an Active Status.



#	Family	First Name	Last Name	Age	class Name	Enrollment Date	Registrated Date
		Baby	Mouse	2	Hip Hop 9-12	10/01/2017	10/23/2017 1:14:04 PM
		Wilma	Pebbles	1	Beginner Ballet	11/20/2017	11/20/2017 10:49:28 AM
		Wilma	Pebbles	1	Hip Hop 4	01/09/2018	1/9/2018 3:12:23 PM
		Wilma	Pebbles	1	Tap	11/20/2017	11/20/2017 10:49:28 AM
	Alley	Billy	Alley	0	Ballet/Tap	12/01/2017	11/28/2017 2:08:33 PM
	Alley	Billy	Alley	0	Contemporary	09/01/2017	11/16/2017 3:39:41 PM
	Alley	Billy	Alley	0	Gymnastics 5-7	10/20/2017	10/17/2017 1:26:10 PM
	Alley	Billy	Alley	0	Hip Hop 4	12/01/2017	11/28/2017 2:08:33 PM
	Alley	Billy	Alley	0	Tap	12/01/2017	11/28/2017 2:08:33 PM
	Arnold	Bryanna	Arnold	6	Ballet 5	09/01/2017	11/16/2017 3:38:38 PM
	Arnold	Bryanna	Arnold	6	Hip Hop 4	09/01/2017	11/16/2017 3:38:38 PM

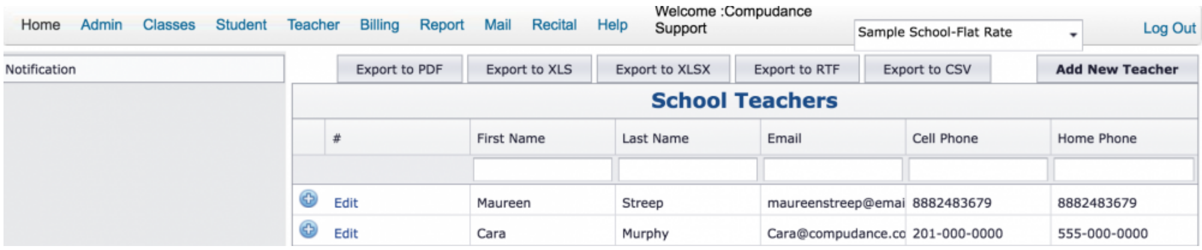
The enrollment date is the date the student is scheduled to begin class. (First date attendance can be taken for this student in this class.)
The registration date is the date/time the student was enrolled in the class. This can be used for Waitlist

classes to determine first in line.
You may filter/sort or group this report as needed.

This video will demonstrate how the report can be used to group for classes and sort by the registration date.

Manage Teachers

To access a list of teachers or to create new teachers, click on *Teacher * from the top menu bar. You will get a list of all entered teachers.

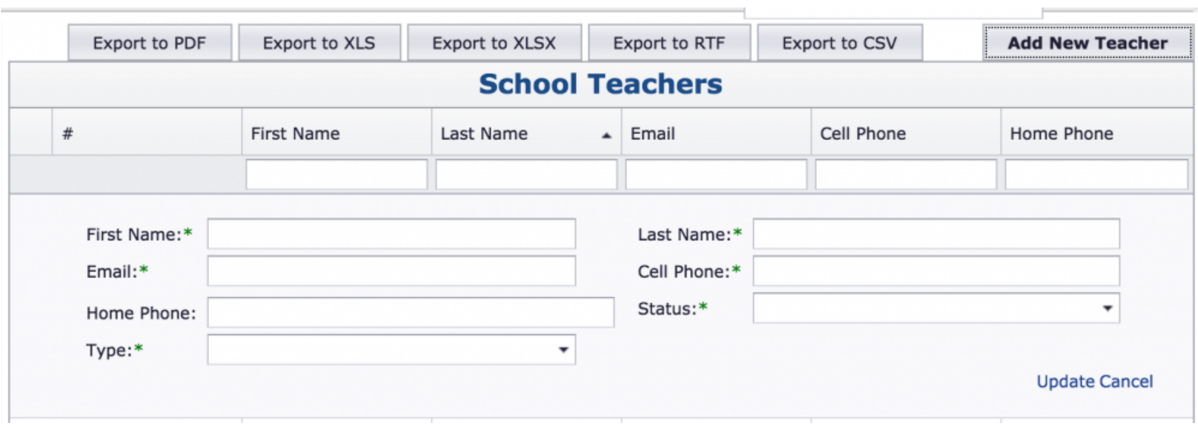


Add New Teacher

To add a new teacher click the **ADD NEW TEACHER** button

All fields with a green * are mandatory. Fill in the information and click update. If you don't know some of the information, you can enter 'dummy' data and update it at a later point in time.

To edit the information, click on Edit and make any necessary changes. Click update to store changes.



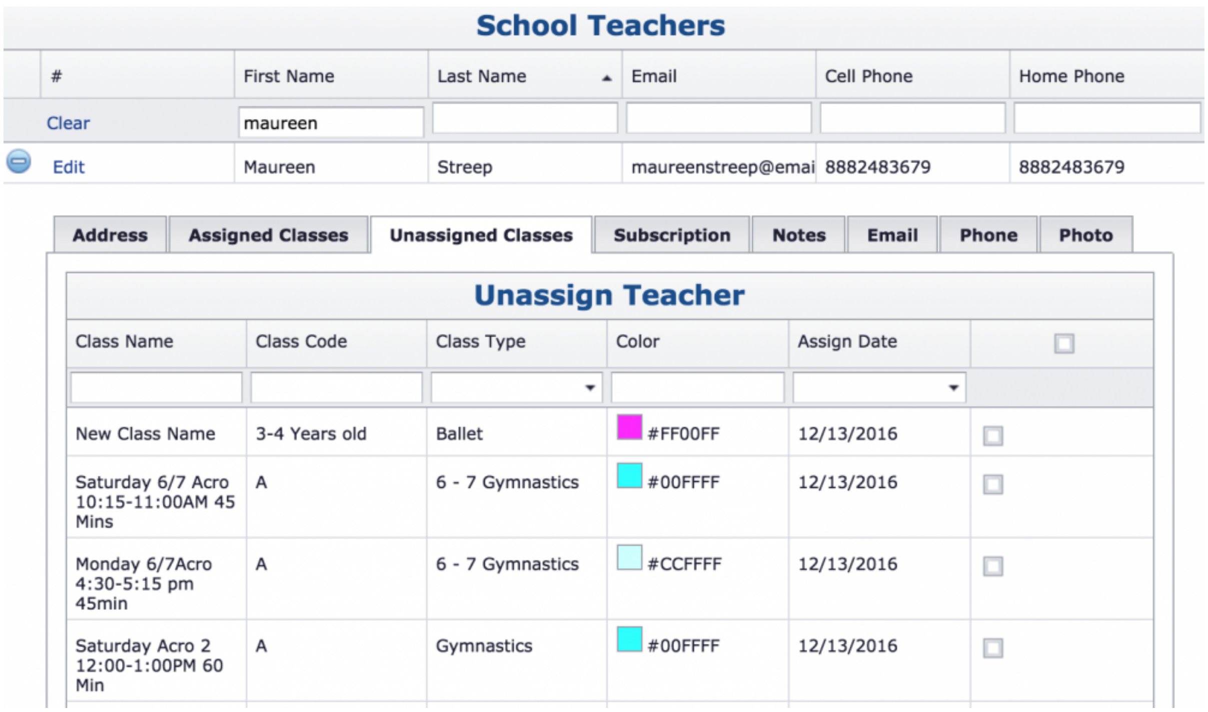
Edit Teacher Data

To edit the teacher name, phone number or email click on edit. Otherwise, click on to expand the tabs.

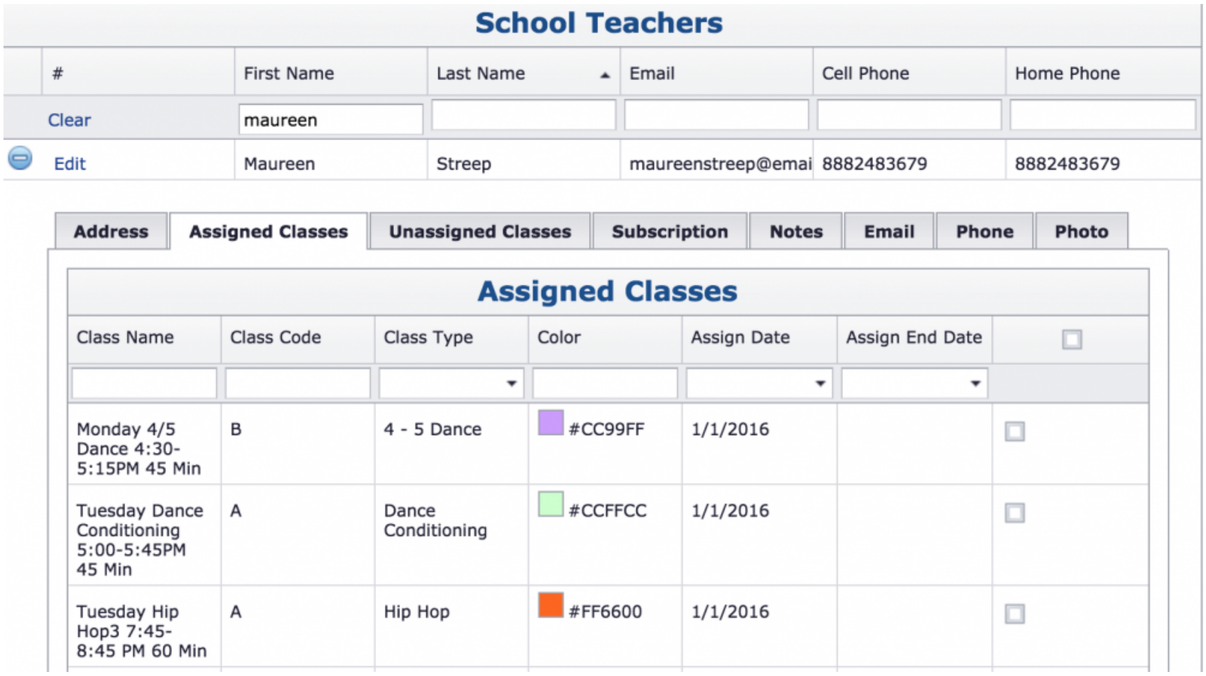
Class Assignment

To **assign** a teacher to a class:

Hit the plus sign on the teacher and select the **UNASSIGNED CLASS TAB**. A list of all classes will appear, select the desired class or classes by clicking the checkbox on the row. To save, enter in the assigned date and clicking the assign button



To **Unassign** a teacher from a class:
Hit the plus sing on the teacher and select the **ASSIGNED CLASS TAB**. A list of the teacher's classes will appear. Click the corresponding check box and enter an UNASSIGNED Date and click the Unassign button. This will remove the teacher from that class.



School Teachers

	#	First Name	Last Name	Email	Cell Phone	Home Phone
	Clear	maureen				
	Edit	Maureen	Streep	maureenstreep@emai	8882483679	8882483679

Address | Assigned Classes | Unassigned Classes | Subscription | Notes | Email | Phone | Photo

Assigned Classes

Class Name	Class Code	Class Type	Color	Assign Date	Assign End Date	
Monday 4/5 Dance 4:30-5:15PM 45 Min	B	4 - 5 Dance	#CC99FF	1/1/2016		
Tuesday Dance Conditioning 5:00-5:45PM 45 Min	A	Dance Conditioning	#CCFFCC	1/1/2016		
Tuesday Hip Hop3 7:45-8:45 PM 60 Min	A	Hip Hop	#FF6600	1/1/2016		

Teacher Portal

A teacher portal is available to those studios that subscribe to that feature. It allows teachers access to their classes and take attendance.

In order for teachers to be able to take attendance online, the following setup must be completed:

Step 1 – Create teacher is in the system

If you are adding a new teacher (Teacher->Add New Teacher)
If the teacher is already listed move to step 2.

Step 2 – Assign the teacher to classes

You can do this in 2 different ways:
Add classes by Teacher

1. Go to the Teacher, click the plus to see the detail tabs.
2. Go to Unassigned Classes tab. Find the classes they should have access to. (If it is not listed, they already are assigned.)
3. Select the class by checking off the box on the right.
4. Enter the Assigned Date of which this teacher can start taking attendance for this class.
5. Click Assign
   The classes should now be listed in Assigned Classes.

You can also assign a teacher to a class under the class.

1. Go to Classes, click the plus for detail tabs.
2. Go to Add Teacher tab
3. Find the teacher
4. Check the box on the right.
5. Enter the Assign Date
6. Click Assign.
   The teacher should now be in the Class Teacher tab.

! Teachers are not assigned when scheduled. More than 1 teacher can have access to take attendance for a class.

Step 3 – Create a User login for the teacher

(this is done under ADMIN/Create User ID)

1. Once created, Link the teacher to their User ID and the school:
2. Click plus to see detail tabs
3. Select Teacher Tab, find teacher and click checkbox on Right. Click the link button.
4. Select School Tab, click the checkbox next to the school or schools the teacher should have access to. Click link button.

The Teacher login and password should now have access to the system and see only their classes assigned.

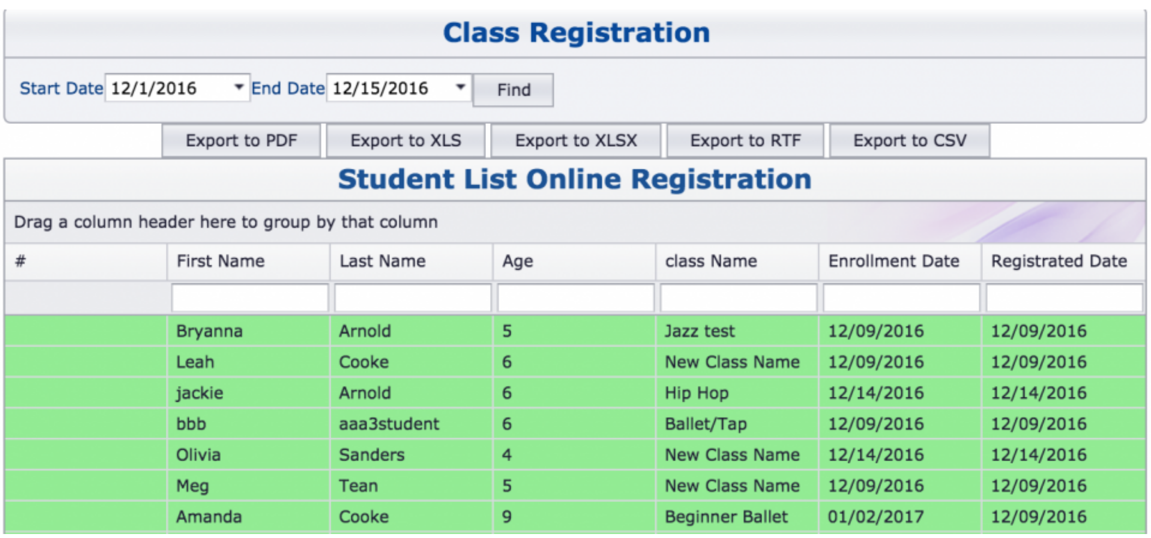
Manage Enrollment/Registration

Class Enrollment can occur by the parent, or the studio from either the student or the class itself.

Studio Enrollment Options:
From the Class
From the Student

Enrollments can be monitored by using the Online Class Registration report.
This report will list ALL class enrollments based on a given date range whether they were added by the parent in using online registration or by the studio staff.
Go to STUDENT and select **STUDENT ONLINE REGISTER.**

Enter in a Start and End date and hit FIND The system will search for all enrollments within the date range.



#	First Name	Last Name	Age	class Name	Enrollment Date	Registrated Date
	Bryanna	Arnold	5	Jazz test	12/09/2016	12/09/2016
	Leah	Cooke	6	New Class Name	12/09/2016	12/09/2016
	jackie	Arnold	6	Hip Hop	12/14/2016	12/14/2016
	bbb	aaa3student	6	Ballet/Tap	12/09/2016	12/09/2016
	Olivia	Sanders	4	New Class Name	12/14/2016	12/14/2016
	Meg	Tean	5	New Class Name	12/09/2016	12/09/2016
	Amanda	Cooke	9	Beginner Ballet	01/02/2017	12/09/2016

The results can be sorted by any of the column headers or specific searches can be performed using the search boxes. For example type in the name of a class to see everyone that has enrolled in it.

Students highlighted in green are active students

If you see a student highlighted in pink listed it is an inactive student. You can then go to the Inactive student list and edit them to change their status to Active.

Attendance

As a staff or Admin user, you can enter attendance for any scheduled class.

✻ Parents are able to see the Attendance entered and comments in the Parent Portal.

Go to the Classes section
On the left, you can choose Class Attendance by Scheduler or Class Attendance by Calendar.
This demonstration is by Scheduler

In both options

- You can do a quick attendance with selecting all or certain students and then clicking the attendance status that corresponds to them.
- You could Edit a student and enter a detailed comment about the attendance. This is where you could also select a Came Late or Left Early Attendance status.

The difference from Scheduler or Calendar is in how to find the class you wish to take attendance.
Class Attendance by Scheduler will show you a table view of the classes that you can filter or sort to find the class.

- Once you find your class, Click the Schedule link in front of the class listing.
- A popup window will appear of the students enrolled in that class.
- You can do a quick attendance with selecting all or certain students and then clicking the attendance status that corresponds to them.
- You could Edit a student and enter detailed information about the attendance. This is where you could also select a Came Late or Left Early Attendance status.

Class Attendance by Calendar will start with the current calendar page, similar to the home page.
(You may have to select *more* in the bottom of that date box if not all classes are initially displayed. It will bring you to the Day's calendar.)

- Tap or click on the class you wish to enter attendance for. You may also have a box popup with the word Attendance. Click it also.
- A popup window will appear of the students enrolled in that class.
- You can do a quick attendance with selecting all or certain students and then clicking the attendance status that corresponds to them.
- You could Edit a student and enter detailed information about the attendance. This is where you could also select a Came Late or Left Early Attendance status.

If you would prefer to print an attendance roster on paper and then enter your attendance status at a later date you can follow the link to Class Manual Attendance Report.

Once your attendance is recorded in Compudance, you may run several Attendance reports to evaluate your studio.

Billing

Billing and payments are organized by invoices. An invoice is created to record money owed to the studio. When payment is received, it is applied to the open invoice therefore linking the charges and payment together.

Invoices are created at the student level and detail the charges using pre-defined ‘income categories’.

In order to bill a student there are a few set up requirements:

Income Categories
Income Categories price
Student enrolled in at least one class

Payment Types

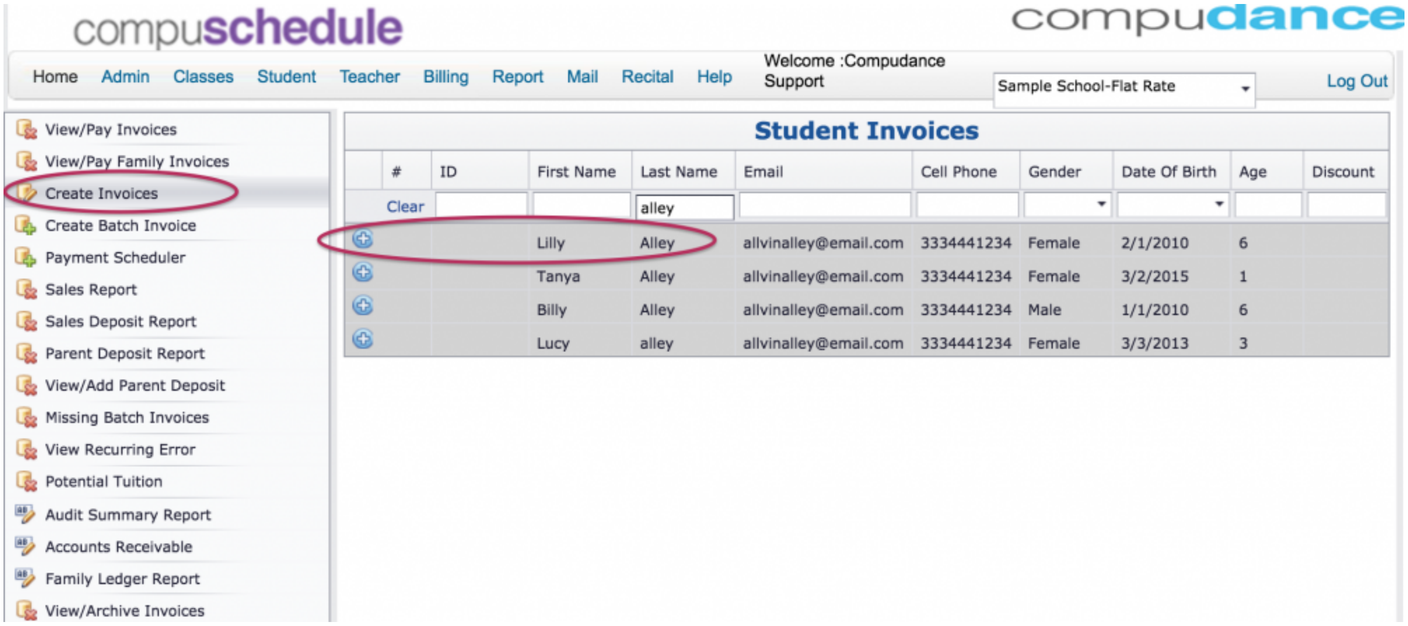
Depending on if you are integrated with Paysafe, the system can accommodate the following payment types:

Payment Type	Paysafe Integration	NO Paysafe Integration
Cash	available	available
Check	available	available
Credit Card	available	Use payment type Check and type in CC in check # field
ACH	available	Use Payment type Check and type ACH in check # field
From Deposit	available	available

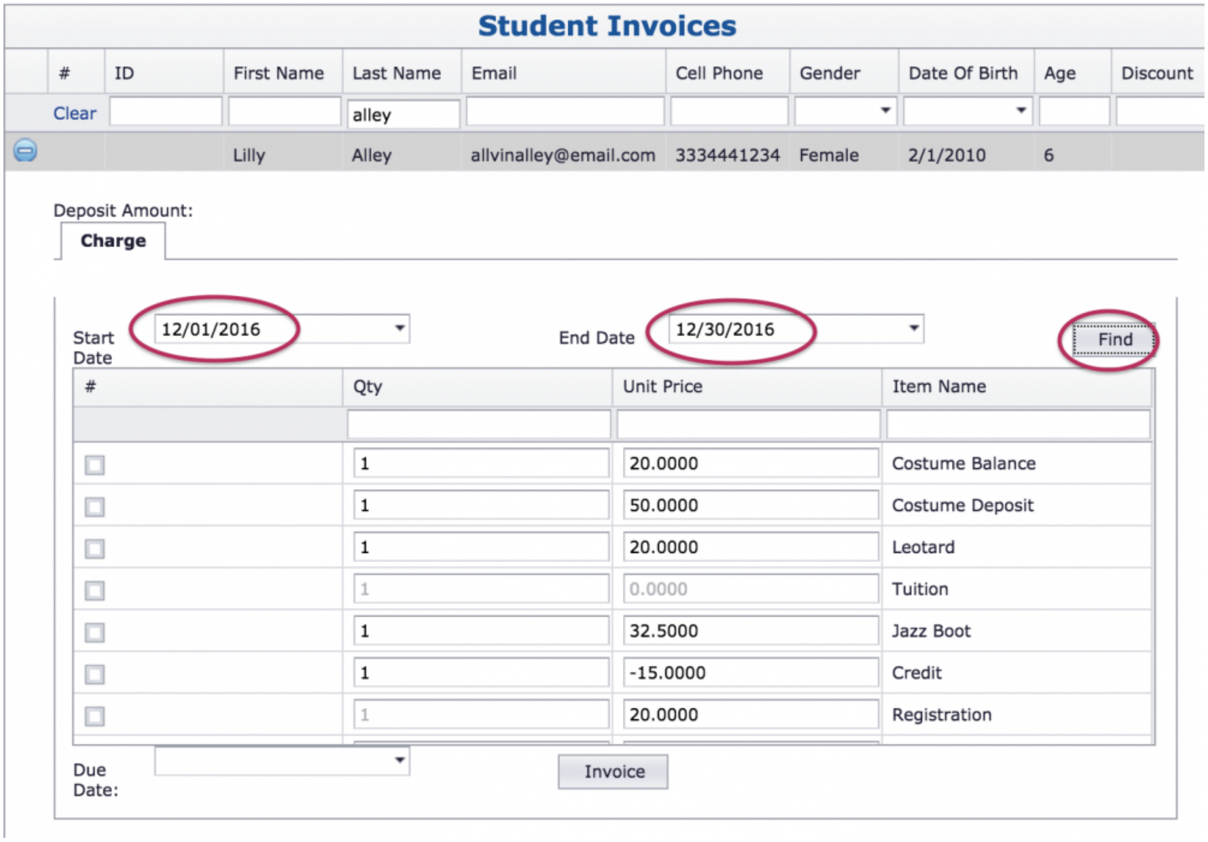
Create Single Invoice

Here is a video to walk you through the Create invoice and make a payment. You can Scroll down for Step directions.

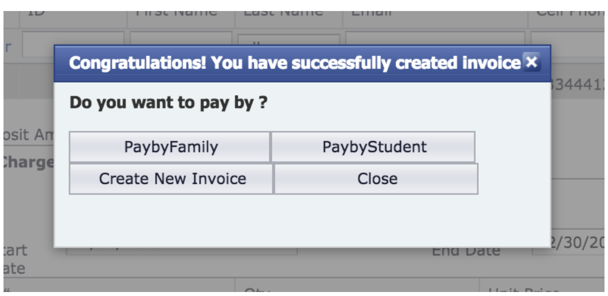
To create an invoice, select Create Invoice from the billing menu.
A list of active students will be shown. Select the student to be invoiced by clicking the Plus sign by their name.



To begin, enter the START and END dates and hit the FIND button. A list of [income categories]() will be displayed. Income categories are the billing line items. Prices are pre-defined but can be overwritten when invoicing (except for Tuition). To override an amount, click in the box and change it. **You can now include a note for a specific invoice category. Just enter the note in the last column. The note will be included in the invoices and statements.** (A manual update and new video will be performed shortly.)



You may select one or more income categories to be billed. Once items are selected, enter in a due date (this is the day payment is due) and hit the **INVOICE** button. You will receive the following confirmation message:



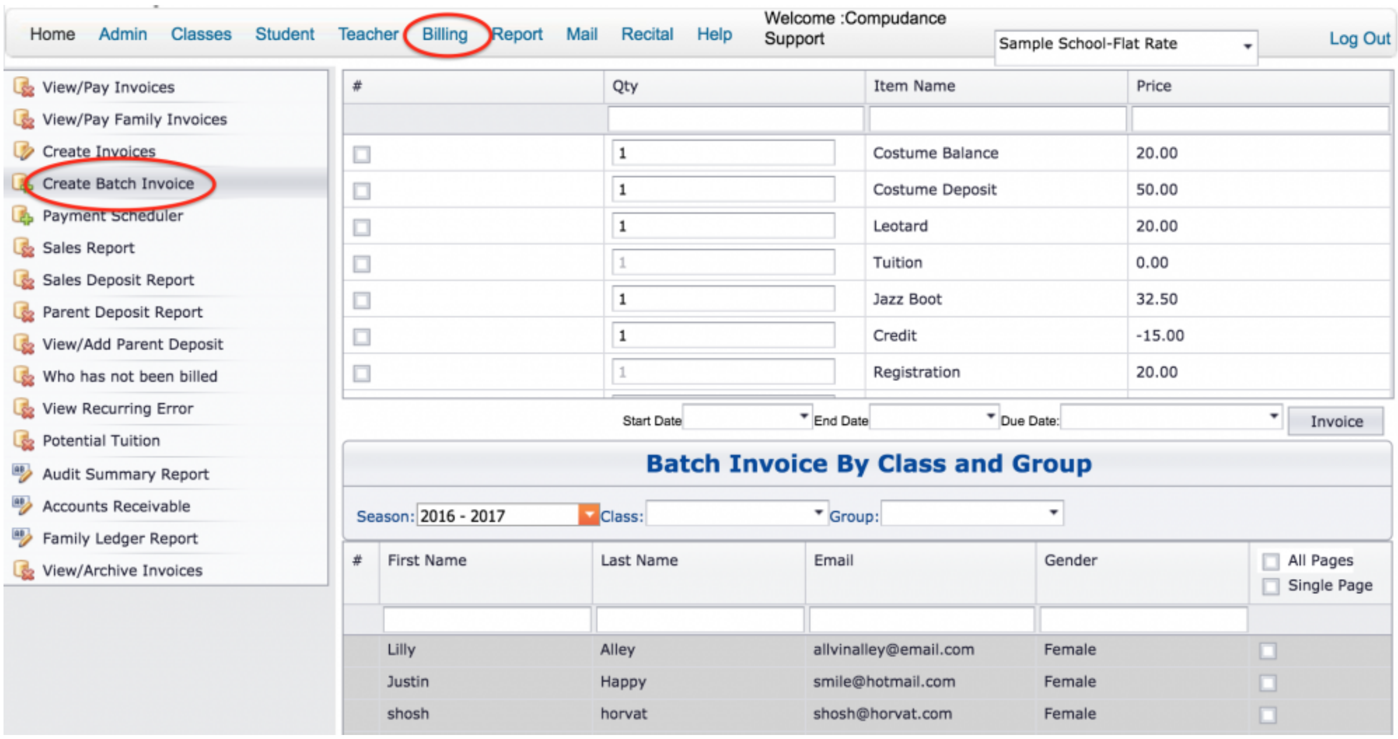
The Confirmation box helps you to navigate to what you want to do next.

Pay by Family	Brings you to the Pay Family Invoice screen
Pay by Student	Brings you to the Pay Invoice Screen
Create New Invoice	Brings you to the Create Invoice Screen
Close	Closes the confirmation box

Create Batch Invoice

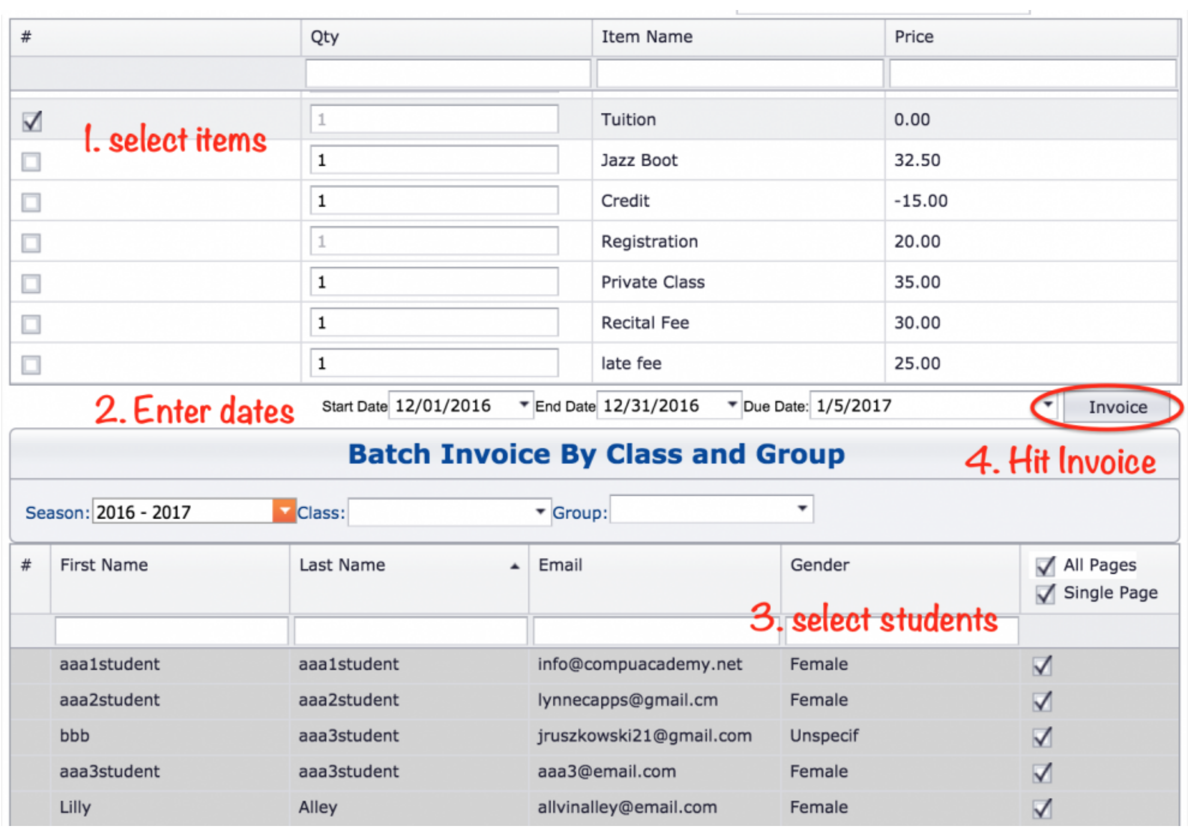
Batch invoice allows you to create invoices for multiple students at the same time. This feature is great for billing tuition or other expenses that need to be charged to a wide group of students.

To begin, go to billing and select Create Batch Invoice.



Create the Batch

- **Select the income categories to be charged – can be one or many**
- **Enter the start and end dates – the dates can be used to represent the time periord being charged or it can simply be today's date**
- **Enter the Due date – the date the payment is due**
- **Select the students to be charged. Can be one, some or all. If selecting all, Click the box that says 'all pages'**



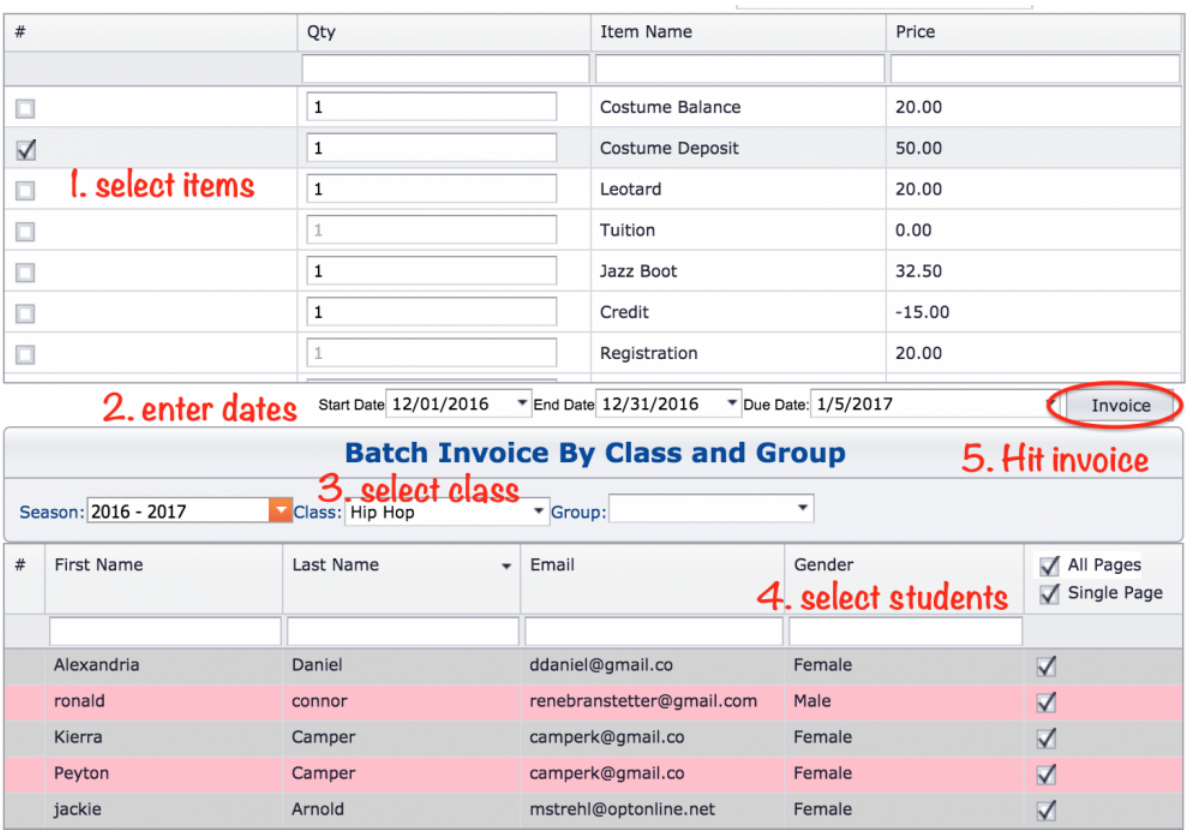
Batch by a Class or Group

Often there is a need to bill just the members of a class or other small group of students. Batch billing gives you the ability to select students based on their class or defined group.

> ✻ If a student line is pink, they have a balance on deposit.

Batch by Class

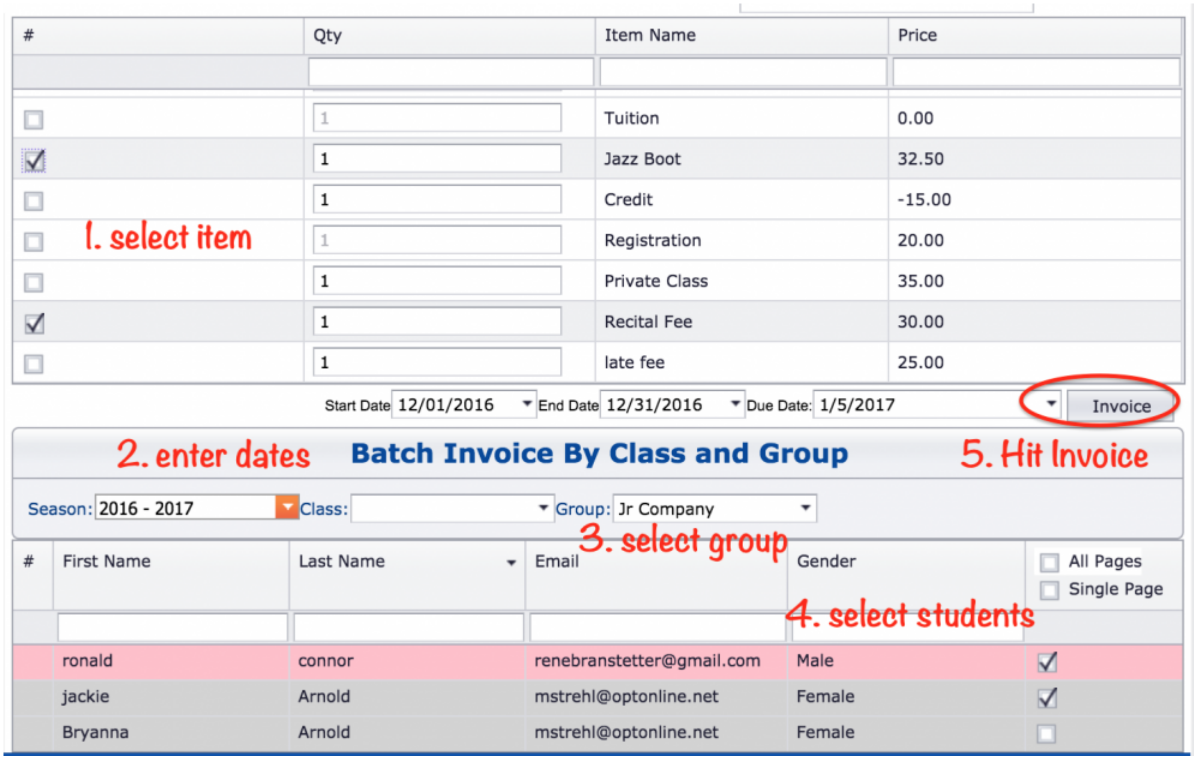
- Select the income categories to be charged – can be one or many
- Enter the start and end dates – the dates can be used to represent the time period being charged or it can simply be today's date
- Enter the Due date – the date the payment is due
- Select the class – this will narrow done the list of students to only those enrolled in the class
- Select the students in the class to be charged. Can be one, some or all. If selecting all, Click the box that says 'all pages'



Batch by Group

- Select the income categories to be charged – can be one or many
- Enter the start and end dates – the dates can be used to represent the time periord being charged or it can simply be today's date
- Enter the Due date – the date the payment is due
- Select the Group – this will narrow done the list of students to only those in the group (groups are setup under ADMIN)

- Select the students in the group to be charged. Can be one, some or all. If selecting all, Click the box that says 'all pages'



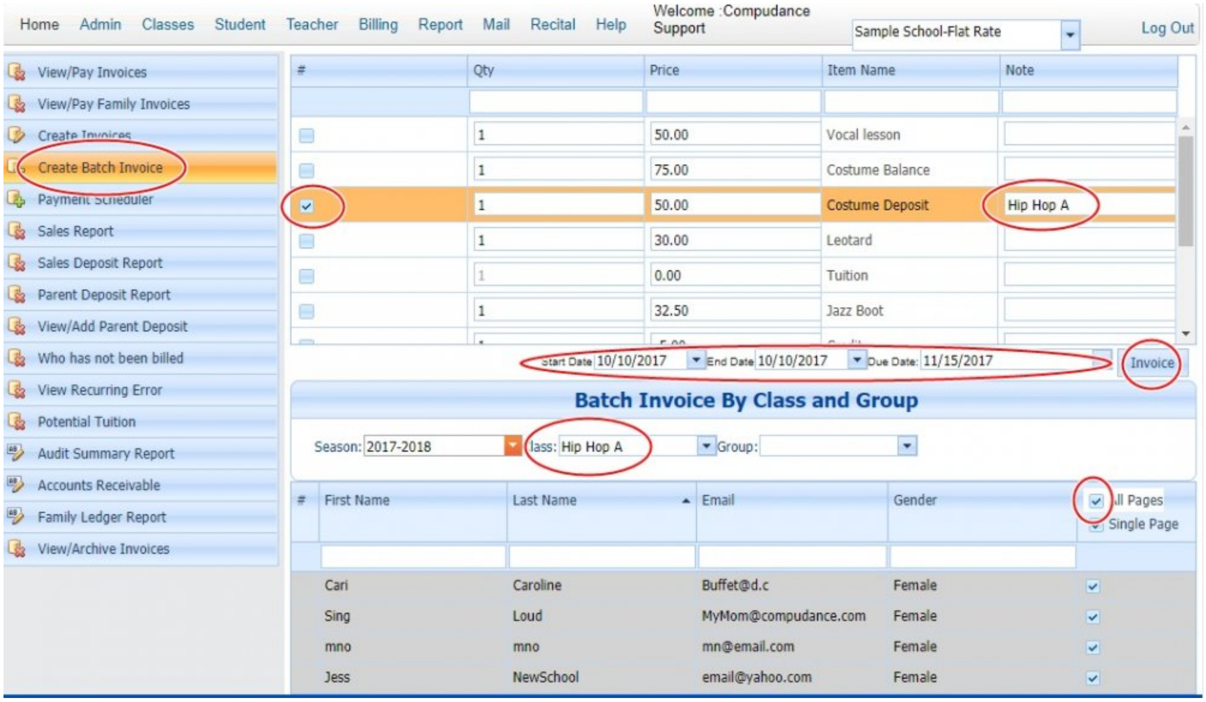
Invoicing Costumes Deposit/Balance

Every Studio may invoice their costumes differently. Please read through the options outlined below.
If you need to discuss your specific procedures please contact us.

> ✻ You do not have to invoice for deposits. If they are not required, you can just put any costume deposit money in the View/Add Parent Deposit with a note it is for costumes. Then when you invoice for costumes, apply the deposits.

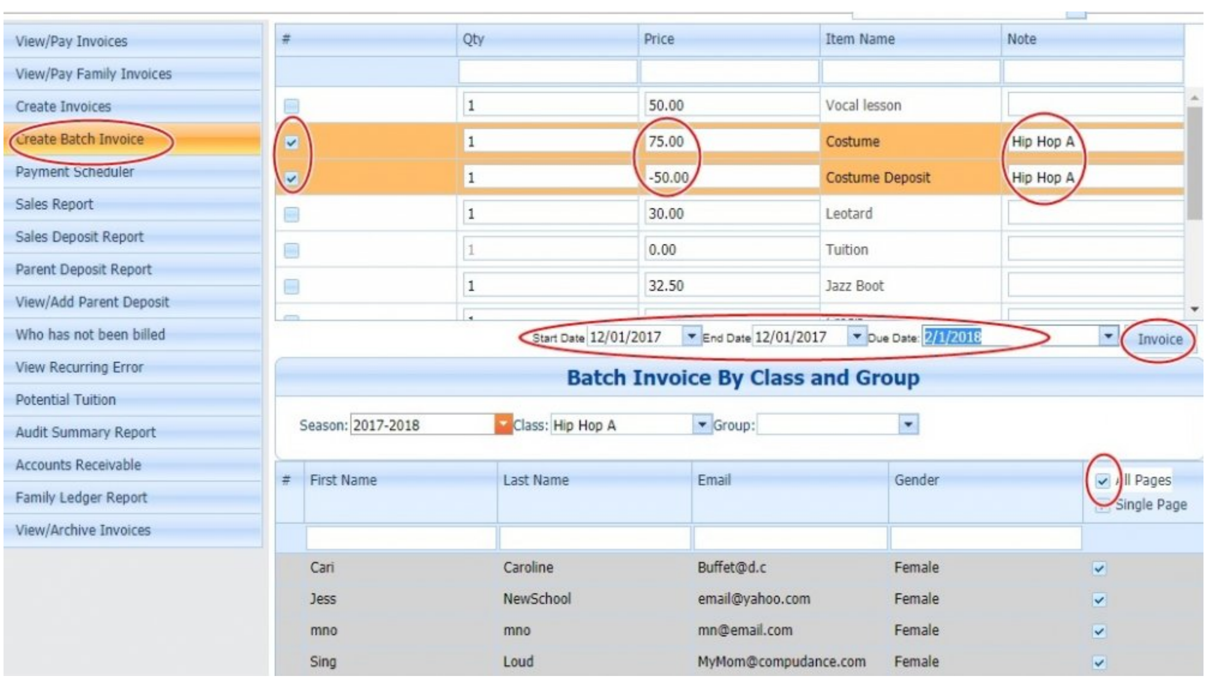
Invoicing Costume Deposits per class

1. You must set the Income Category Price that will be charged in Billing-Income Category Price tab.
2. Go to Billing – Create Batch Invoice
3. In the top section, select the category to be charged. Costume Deposit. The line will change color. You may add a note, we suggest the class name or style to make it easier if a student takes more than 1 class and is asked for multiple deposits.
4. Go to the bottom of the page. Use the Class Filter and select the class to be charged. THe students listed will only be the students actively enrolled in that class. Select All pages. These are the students receiving the charge.
5. In the middle of the page, enter the 3 dates. Since a deposit is more of a transaction request you can use today's date for the start and end dates. Set the due date to when they are due.
6. Click Invoice.



Invoicing Costume Balance

If you collect taxes on Costumes you <u>must</u> invoice the full price of the costume to have the tax amount calculate correctly.
When invoicing, you would also select the costume deposit as a negative being applied.



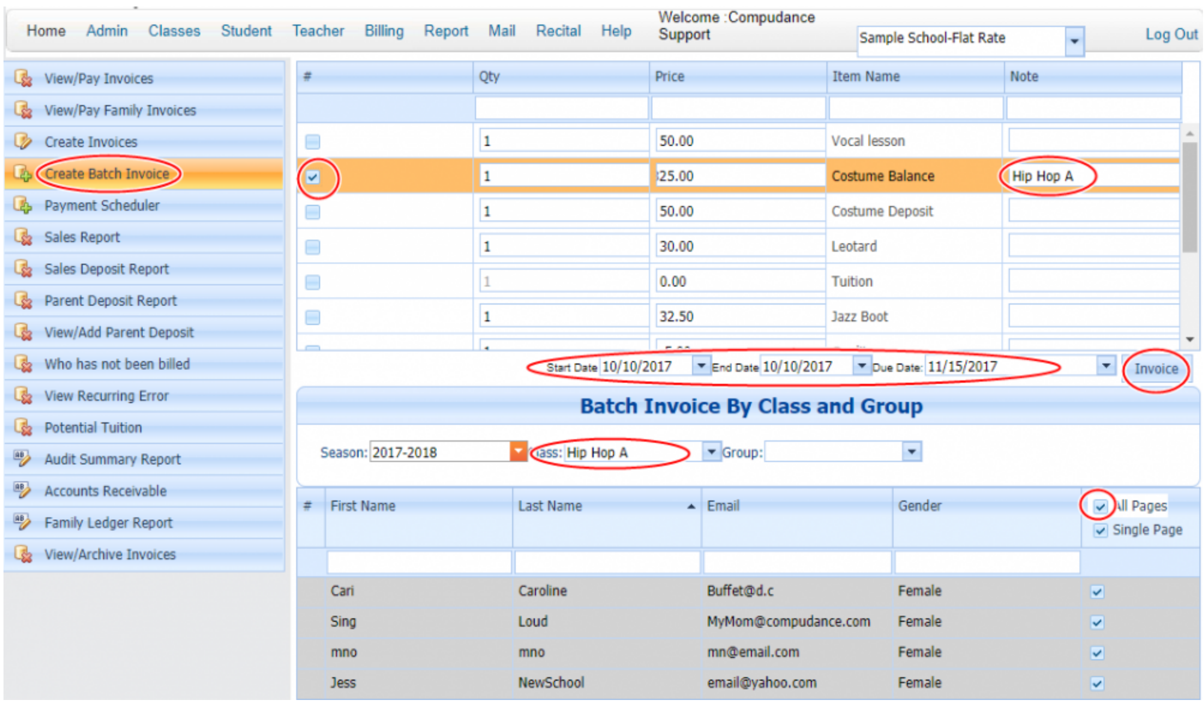
Sample School-Flat Rate
99 W Madison Ave Dumont, New Jersey 07628
support@compuacademy.net
5512652967

Client:	Caroline Sweet 4 Song nash, Tennessee22222	Student:	Cari Caroline
		Period:	12/01/2017-12/01/2017

Qty	*Description*	*Amount*	*Tax*	*Total Amount*
1	Costume-Hip Hop A	75.00	5.25	80.25
1	Costume Deposit-Hip Hop A	-50.00	0.00	-50.00
			Sub Total	25.00
			Sales Tax	5.25
			Total Amount	30.25
			Paid Amount	0.00
			Balance	30.25

The Balance is Due 02/01/2018.

If you do not collect taxes on Costumes, you may just invoice the Costume Balance still owed per class.



> Do not worry if a Deposit was not paid, that original invoice will still be OPEN with a balance and show on the Statement for payment.
> p(banner tip). You can send out Costume Statements to include all of the costumes on 1 email/print out for that student/family.

Invoicing by Family

You may need to invoice something per family.
We find the easiest way to do this is to batch invoice. In the bottom area, sort the student list by email address.
Then check off each distinct email address. This may not work for your studio based on how you keep email addresses. Some studios will create a School Group called First Student in Family. Then add 1 sibling to this group. That way you can batch invoice filtering the student list by Group.

We are working on changing this process in the future.

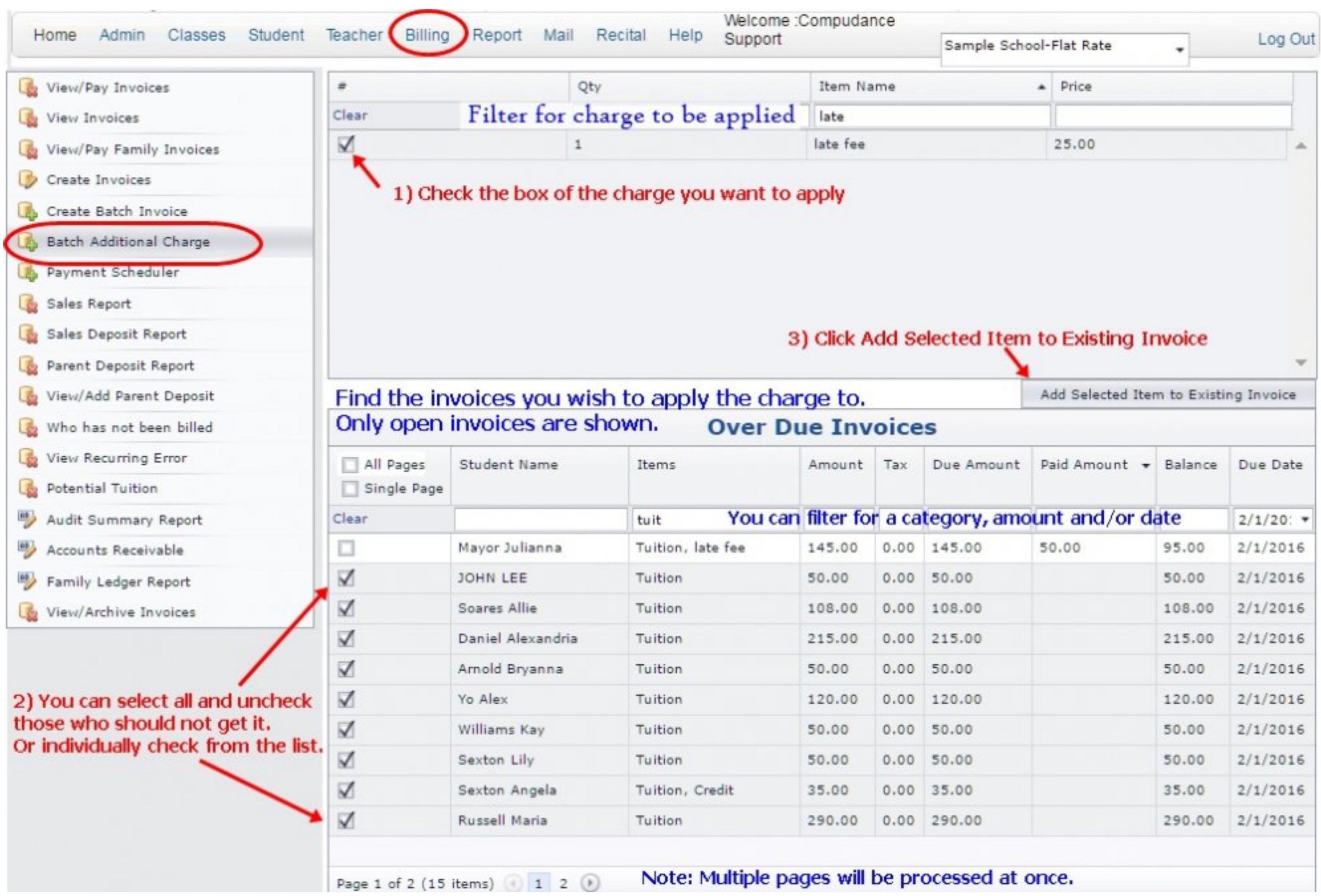
Late Fees/Other Add-on Charges

You can add an additional charge to an existing invoice or group of invoices.

First you must already have the income category created and the price set for which you wish to charge.
To create a new charge category go to [Admin->School Setting Types->Income Categories]
To set the price go to Billing – > [Income Category Price]

> ✻ You could apply a negative charge to reduce an invoice amount. See [Negative Income Price] Use Caution.

Go to Billing – > Batch Additional Charge.



1. Select the category you wish to apply. Check the box. You may select more than 1.
2. Find the open invoices who should have this additional charge applied.In the bottom table. You may filter for student, income category/item, amount, due date Check the front of the invoice to mark it for applying the additional charge. You may select one invoice or all.
3. Click Add Selected Item to Existing Invoice

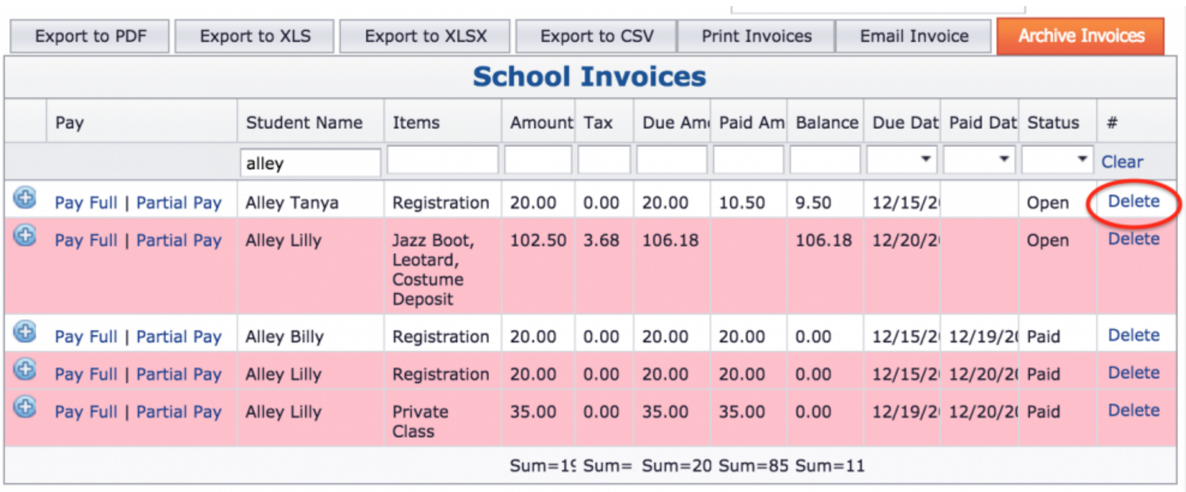
> ! Once a charge is applied you will not be able to remove it unless you delete the invoice and start over.

This feature can be used to change a tuition invoice after it is invoiced, especially if a class is dropped. We recommend you make a negative income category “ Tuition Adjustment- Class Dropped or Cancelled” or something like it. **Do not edit the price of category “Tuition”.**
You may then add the adjustment to the Tuition invoice resulting in the balance being reduced by the negative amount. Make sure the invoice balance will not fall to zero or below. In that case you must place the adjustment as a parent adjustment in” View/Add Parent Deposits.”:#deposit

Delete Invoices

Delete an Invoice with no payments applied

- GO to View/Pay Invoice, and locate the invoice.
- Simply hit delete to the right of the selected invoice. This removes the invoice in entirety.



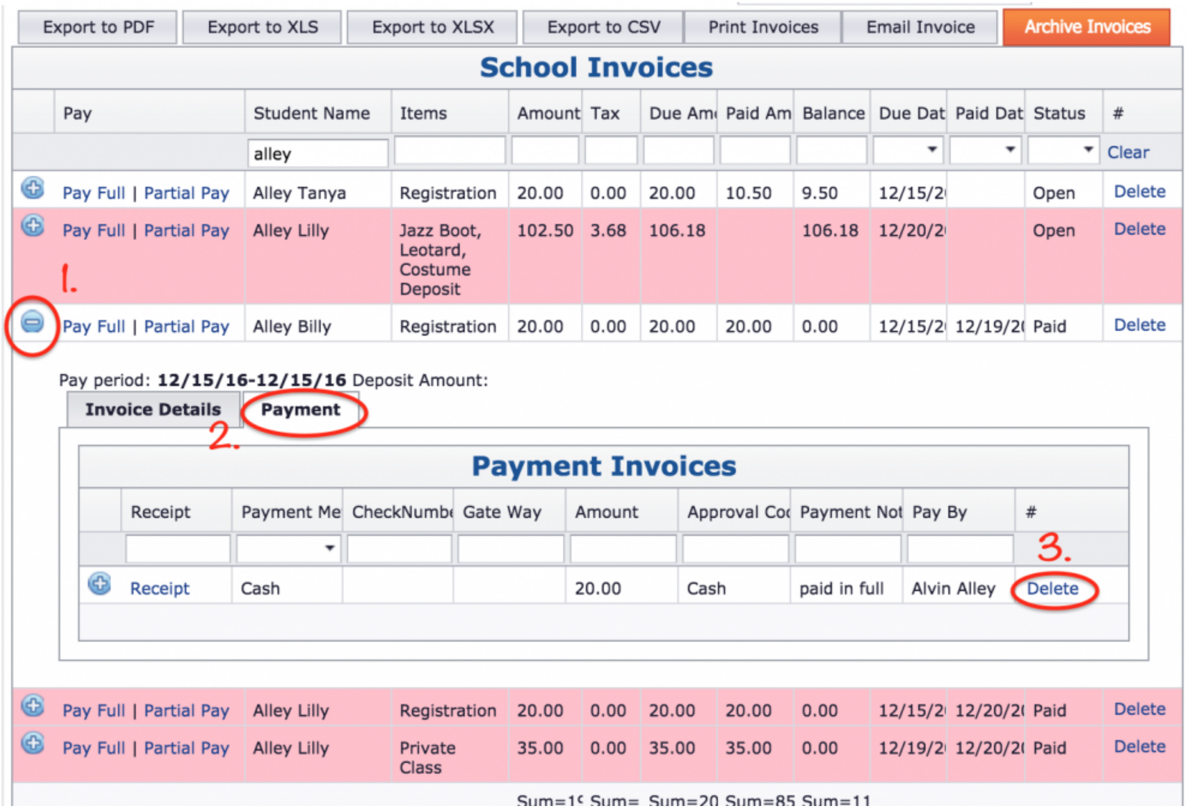
	Pay	Student Name	Items	Amount	Tax	Due Am	Paid Am	Balance	Due Dat	Paid Dat	Status	#
		alley										Clear
	Pay Full | Partial Pay	Alley Tanya	Registration	20.00	0.00	20.00	10.50	9.50	12/15/2		Open	Delete
	Pay Full | Partial Pay	Alley Lilly	Jazz Boot, Leotard, Costume Deposit	102.50	3.68	106.18		106.18	12/20/2		Open	Delete
	Pay Full | Partial Pay	Alley Billy	Registration	20.00	0.00	20.00	20.00	0.00	12/15/2	12/19/2	Paid	Delete
	Pay Full | Partial Pay	Alley Lilly	Registration	20.00	0.00	20.00	20.00	0.00	12/15/2	12/20/2	Paid	Delete
	Pay Full | Partial Pay	Alley Lilly	Private Class	35.00	0.00	35.00	35.00	0.00	12/19/2	12/20/2	Paid	Delete
				Sum=1	Sum=	Sum=20	Sum=85	Sum=11				

Delete an invoice where payment(s) were applied (partial or full)

An invoice can not be deleted if any payments were made against it. You would first have to delete all payments prior to deleting the invoice.

To delete payments:

- Hit the plus sign on invoice
- select payment tab
- hit delete on the row of the payment you want to delete
- If multiple payments, each has to be deleted

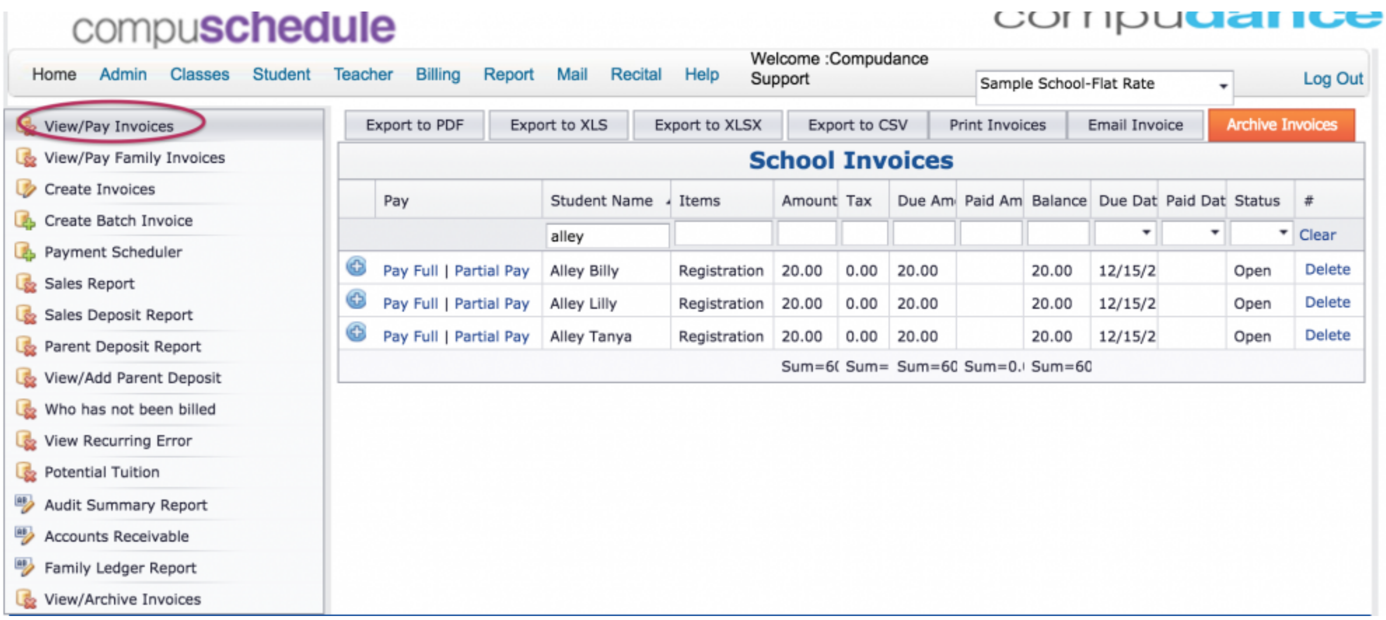


✱ If you have the auto-pay feature activated, the payment must first be deleted from the payment scheduler before it can be deleted off the invoice.

View & Pay Invoice by Student

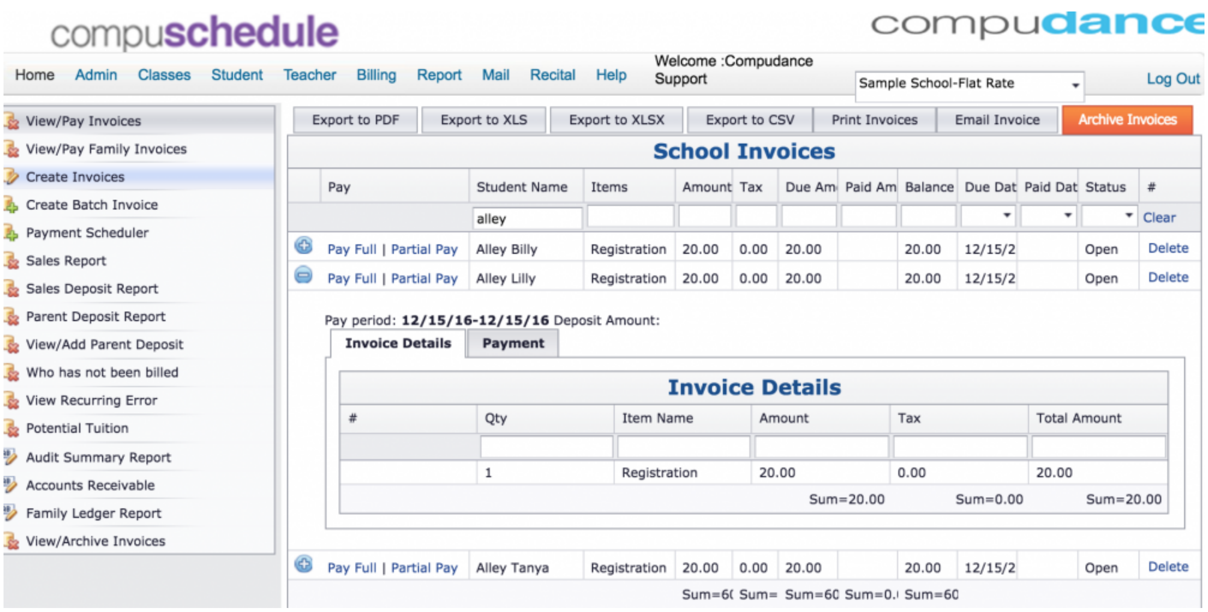
From the billing menu click on **View/Pay invoice**. This menu option allows you to simply **view** individual invoices or **make a payment** on existing invoices.

The screen will first display all invoices. You have the option of narrowing your search by entering in a student name, due date or other search criteria. You may also view only *open* invoices by selecting the status of OPEN.



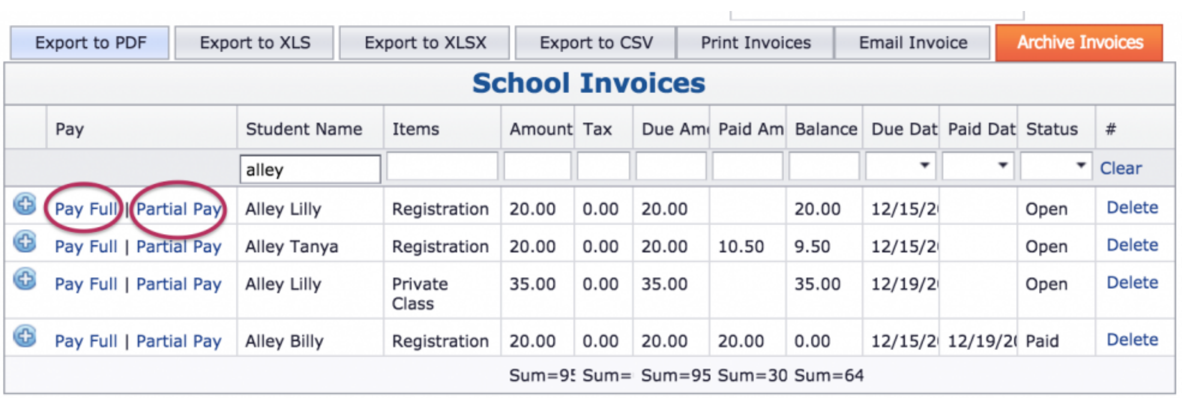
View Invoice Details

Click on the plus sign. The invoice will expand and the billing details are displayed.



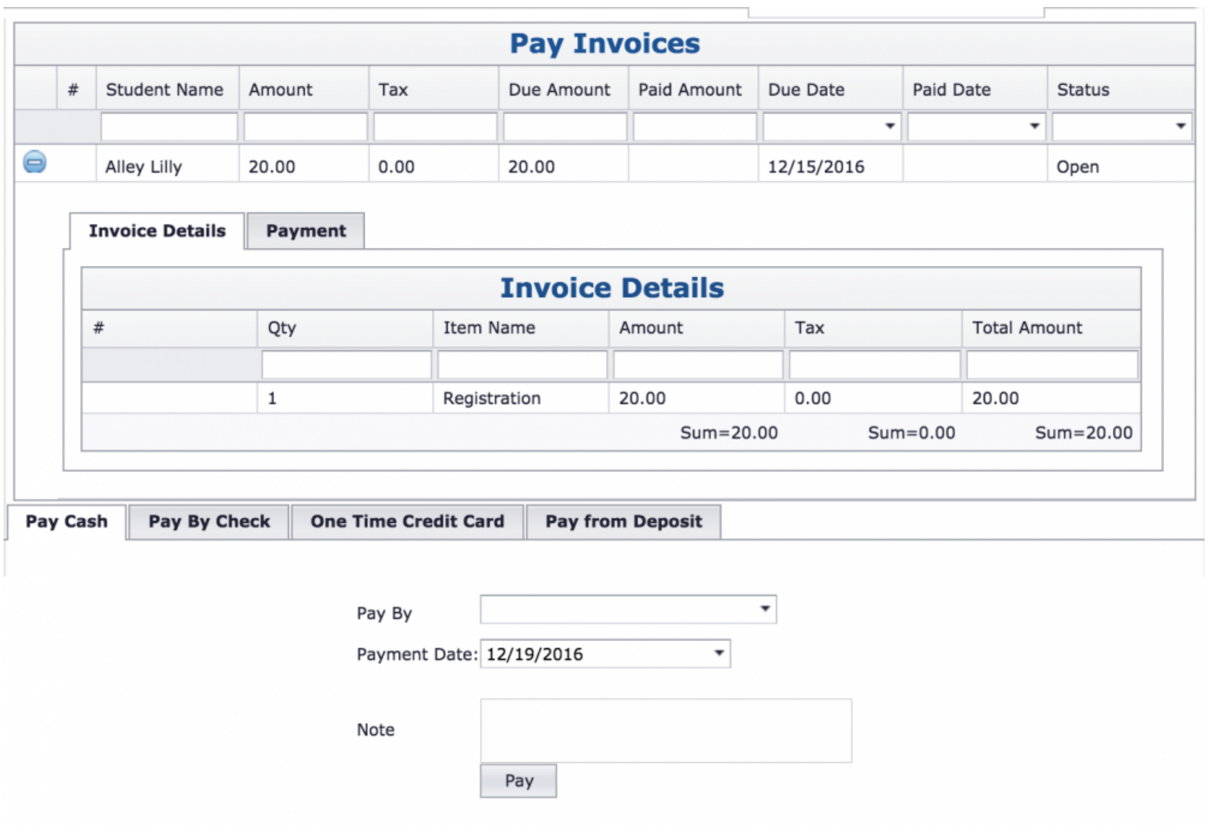
Make a payment

There are two payment options – pay in full or make a partial payment on the invoice



How to Pay in Full

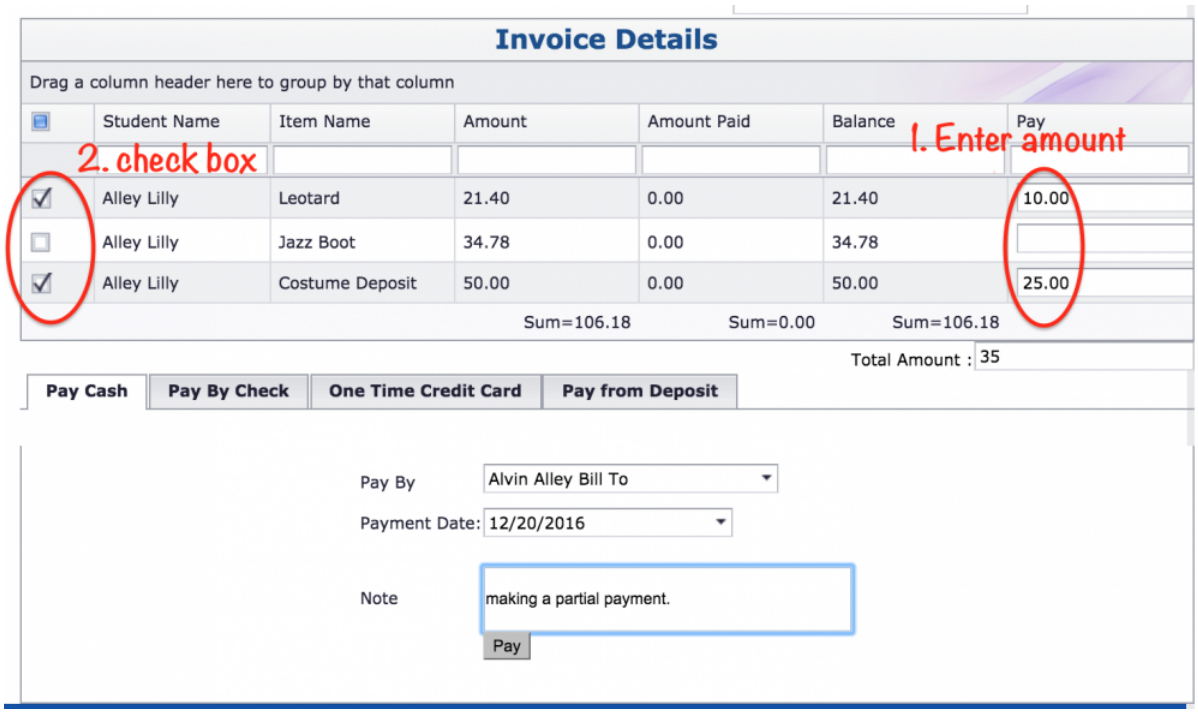
- Select Pay Full
- Select payment type (cash, check, credit card, ACH, From Deposit)
- Select the Bill to Person
- Payment Date – will default to today's date but can be changed to a date in the past or future
- Note – is an optional field and allows you to enter a message
- Hit PAY button



How to Partial Pay

- Select Partial Pay in front of the invoice line you want a payment applied.
- 1st Enter amount – a partial amount can be entered on each line item. Leave blank if not applying any payment to an item.
- 2nd Click the checkbox on only those items to which you are applying partial payment You will see the Total Amount box calculate the total of the payments to be applied.
- Select payment type (cash, check, credit card, ACH, From Deposit)
- Select the Bill to Person

- **Payment Date – will default to today’s date but can be changed to a date in the past or future**
- **Note – is an optional field and allows you to enter a message. The NOTE will be shown on the Statements.**
- **Hit PAY button**



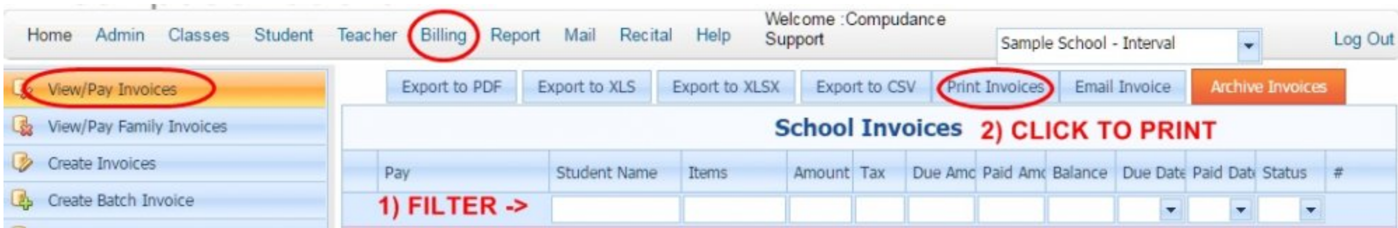
When using Partial Pay on invoices, all future payments on that invoice must also be made using Partial Pay, even when paying off the balance in full if using View/Pay Invoices.

Print or Email Invoices

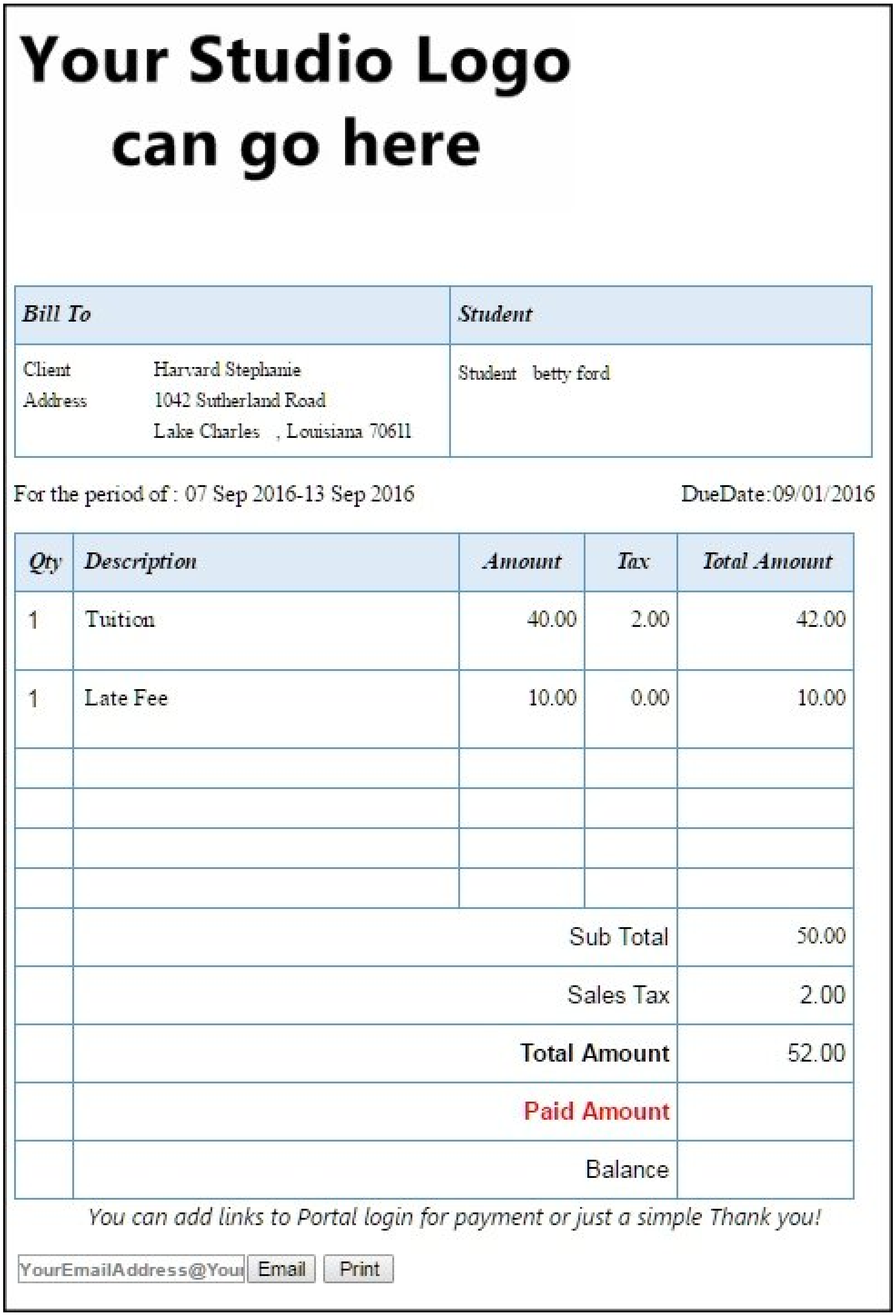
To print or email each invoice separately go to Billing -> View/Pay Invoices.

Filter the list of invoices to show only the invoices that you wish to Print or Email.

Each line will be a separate page and a separate email addressed to the Bill to guardian for the student.



To print the invoice(s) listed- Click the Print Invoice button on the top.



Your Studio Logo can go here

Bill To		*Student*	
Client	Harvard Stephanie	Student	betty ford
Address	1042 Sutherland Road		
	Lake Charles , Louisiana 70611		

For the period of : 07 Sep 2016-13 Sep 2016 DueDate:09/01/2016

Qty	*Description*	*Amount*	*Tax*	*Total Amount*
1	Tuition	40.00	2.00	42.00
1	Late Fee	10.00	0.00	10.00
			Sub Total	50.00
			Sales Tax	2.00
			Total Amount	52.00
			Paid Amount	
			Balance	

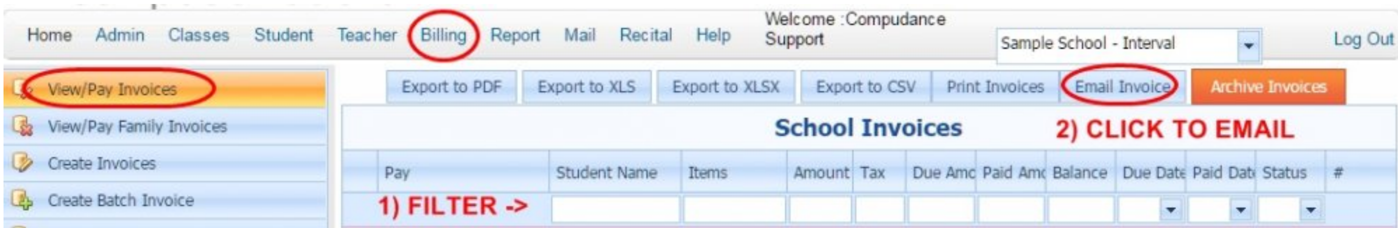
You can add links to Portal login for payment or just a simple Thank you!

YourEmailAddress@You Email Print

Each invoice will become 1 page and be formatted from the Invoice alert- To Edit go to [Invoice and Statement Alerts]

> ✱ To email the statements to a different email address than the bill to guardian, you may enter the address at the bottom of the Print Invoice preview. Keep in mind all invoices in the print preview will be sent individually to the email entered.

If you wish to Email the individual Invoices to each Bill to Guardian once the invoices you wish to send are filtered for, click Email Invoices.



Each invoice will become 1 email and be formatted from the Invoice alert- To Edit go to [Invoice and Statement Alerts]

[To email a collection of invoices by Family or Student See Family Ledger/ Statements]

[To print a collection of invoices – here is a way to export and print using Excel.]

View & Pay Invoice by Family

Family invoices combines the invoices of all members within a family.

Export to PDF | Export to XLS | Export to XLSX | Export to RTF | Export to CSV

School Family Account

#	Family Id	Family Name	First Nam	LastName	Address 1	Address 2	City	State	Zip Code	Deposit	Balance
	27050	Moss	Karen	Moss	134 Main St		Tenafly	New Jersey	07670	110.00	285.60
	61366	smith	jen	smith	1 here	2 there	town	Nebraska	35645		
	60711	testflag4	testflag4	testflag4	testflag4		testflag4	Alabama	12345		
	59910	Paul	Janet	Paul	85 Smith Ave		St. Me	Tennessee	44455		
	59907	Smith	Dan	Smith	965 main		mytown	Nebraska	11223		
	59582	Morris	Beth	Morris	12 Mainstree		River	New Jersey	08765		84.00
	59574	Parent2	Parent1	Parent2	7W CLINTON AVE		BERGENF	New Jersey	07621		
	57461	Smith	Sally	Smith	1 street road		Philadelph	Pennsylva	19150		588.00

See a short video on how it works!

View Open & Paid Invoices	Pay Multiple Invoices	Partial Pay Invoice	Correct Family

Under the Billing menu, select View/Pay Family Invoices It will display the contact information for the family, available deposit balance and open invoice balance.

Export to PDF | Export to XLS | Export to XLSX | Export to RTF | Export to CSV

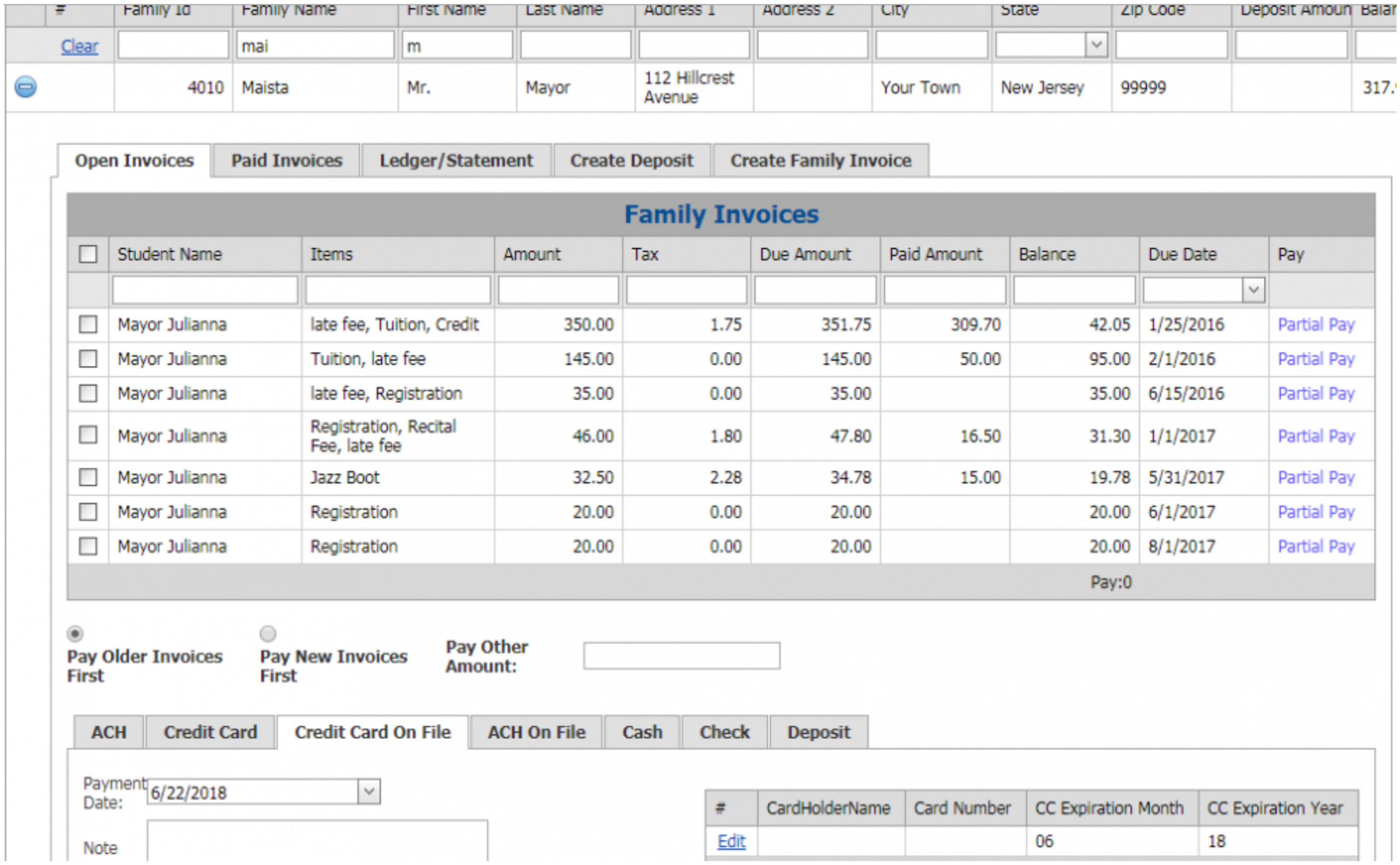
School Family Account

	#	Family Id	Family Name	First Nam	LastName	Address 1	Address 2	City	State	Zip Code	Deposit	Balance
⊕		27050	Moss	Karen	Moss	134 Main St		Tenafly	New Jersey	07670	110.00	285.60
⊕		61366	smith	jen	smith	1 here	2 there	town	Nebraska	35645		
⊕		60711	testflag4	testflag4	testflag4	testflag4		testflag4	Alabama	12345		
⊕		59910	Paul	Janet	Paul	85 Smith Ave		St. Me	Tennessee	44455		
⊕		59907	Smith	Dan	Smith	965 main		mytown	Nebraska	11223		
⊕		59582	Morris	Beth	Morris	12 Mainstree		River	New Jersey	08765		84.00
⊕		59574	Parent2	Parent1	Parent2	7W CLINTON AVE		BERGENF	New Jersey	07621		
⊕		57461	Smith	Sally	Smith	1 street road		Philadelph	Pennsylva	19150		588.00

View Open and Paid Invoices

Click the plus sign on the family name and there will be two tabs: Open Invoice and Paid Invoice

Open invoice includes any invoices with an unpaid balance.



#	Family Id	Family Name	First Name	Last Name	Address 1	Address 2	City	State	Zip Code	Deposit Amount	Balance
Clear		mai	m								
	4010	Maista	Mr.	Mayor	112 Hillcrest Avenue		Your Town	New Jersey	99999		317.

Open Invoices | Paid Invoices | Ledger/Statement | Create Deposit | Create Family Invoice

Family Invoices

	Student Name	Items	Amount	Tax	Due Amount	Paid Amount	Balance	Due Date	Pay
☐	Mayor Julianna	late fee, Tuition, Credit	350.00	1.75	351.75	309.70	42.05	1/25/2016	Partial Pay
☐	Mayor Julianna	Tuition, late fee	145.00	0.00	145.00	50.00	95.00	2/1/2016	Partial Pay
☐	Mayor Julianna	late fee, Registration	35.00	0.00	35.00		35.00	6/15/2016	Partial Pay
☐	Mayor Julianna	Registration, Recital Fee, late fee	46.00	1.80	47.80	16.50	31.30	1/1/2017	Partial Pay
☐	Mayor Julianna	Jazz Boot	32.50	2.28	34.78	15.00	19.78	5/31/2017	Partial Pay
☐	Mayor Julianna	Registration	20.00	0.00	20.00		20.00	6/1/2017	Partial Pay
☐	Mayor Julianna	Registration	20.00	0.00	20.00		20.00	8/1/2017	Partial Pay
								Pay:0	

#	CardHolderName	Card Number	CC Expiration Month	CC Expiration Year
Edit			06	18

In the 2nd tab, Paid invoices only show invoices that are paid in full. Partially paid invoices are still in the Open Invoices tab.

	#	Family Id	Family Name	First Nam	LastName	Address 1	Address 2	City	State	Zip Code	Deposit A	Balance
	Clear		cam									
		4002	Camper/Craddock	Lisa	Craddock	327 Crestview Road		Westwooc	New Jersey	99999	5.00	618.51

Deposit Amount:

Open Invoices | Paid Invoices

Family Invoices

#	Student Name	Items	Amount	Tax	Paid Amount	Due Date	Paid Date
	Camper Peyton	late fee, Registration	35.00	0.00	35.00	6/15/2016	6/3/2016
	Camper Peyton	Tuition	50.00	0.00	50.00	11/1/2015	6/3/2016
	Camper Peyton	Tuition	50.00	1.00	51.00	8/30/2016	10/7/2016
	Camper Peyton	Tuition	50.00	0.00	50.00	10/1/2016	6/3/2016
	Camper Peyton	Tuition	50.00	0.00	50.00	2/1/2016	6/3/2016
	Camper Peyton	Tuition	50.00	0.00	50.00	12/1/2015	2/9/2016
	Camper Peyton	Tuition	50.00	0.00	50.00	1/1/2016	6/3/2016
	Camper Peyton	Tuition	340.00	0.00	340.00	1/25/2016	6/3/2016
	Camper Peyton	Jazz Boot	32.50	2.28	34.78	10/1/2016	10/7/2016
	Camper Peyton	Costume Deposit	50.00	0.00	50.00	10/28/2016	10/7/2016
			Sum=1,122.!	Sum=11.34	Sum=1,133.(		

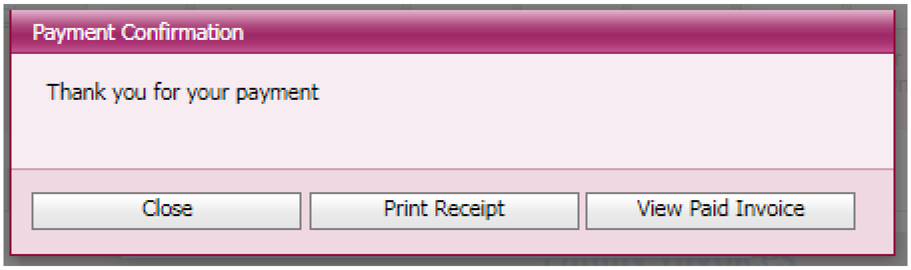
Page 1 of 2 (17 items) 1 2

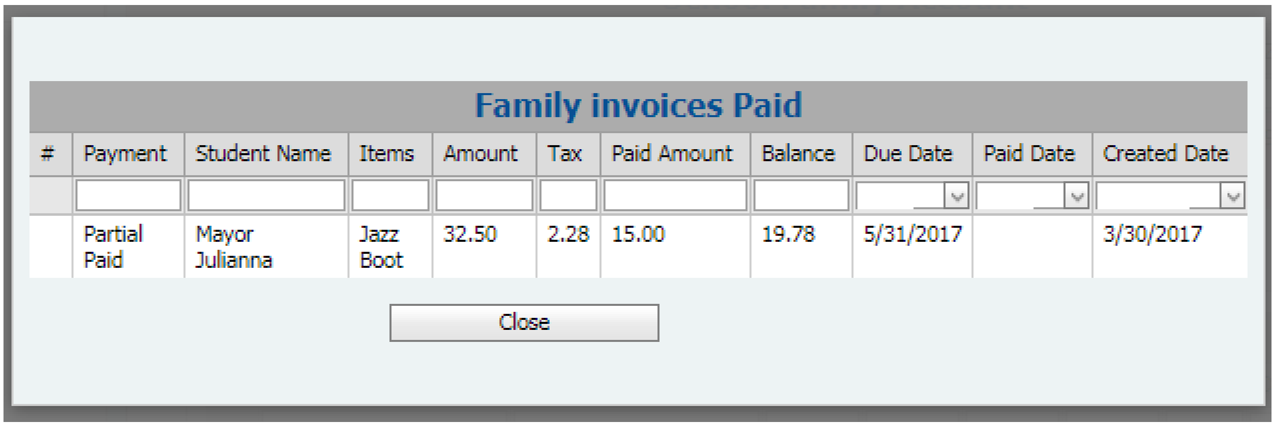
Pay Multiple Invoices in Full

- Select the OPEN INVOICE Tab
- Select invoices to be paid by clicking the corresponding checkbox
  The pay amount (sum of the balances of checked invoices) will be totalled under the Balance Column.

Select payment type tab and enter information.

- Payment date will default today's date but can be overridden to a date in the past or future
- Note – is an optional field and allows you to enter a message. The NOTE will be shown on the Statements.
- Click PAY button
- You are given an option to View the payments applied after the amount is processed. You may also create a receipt to print or email.




Family invoices Paid

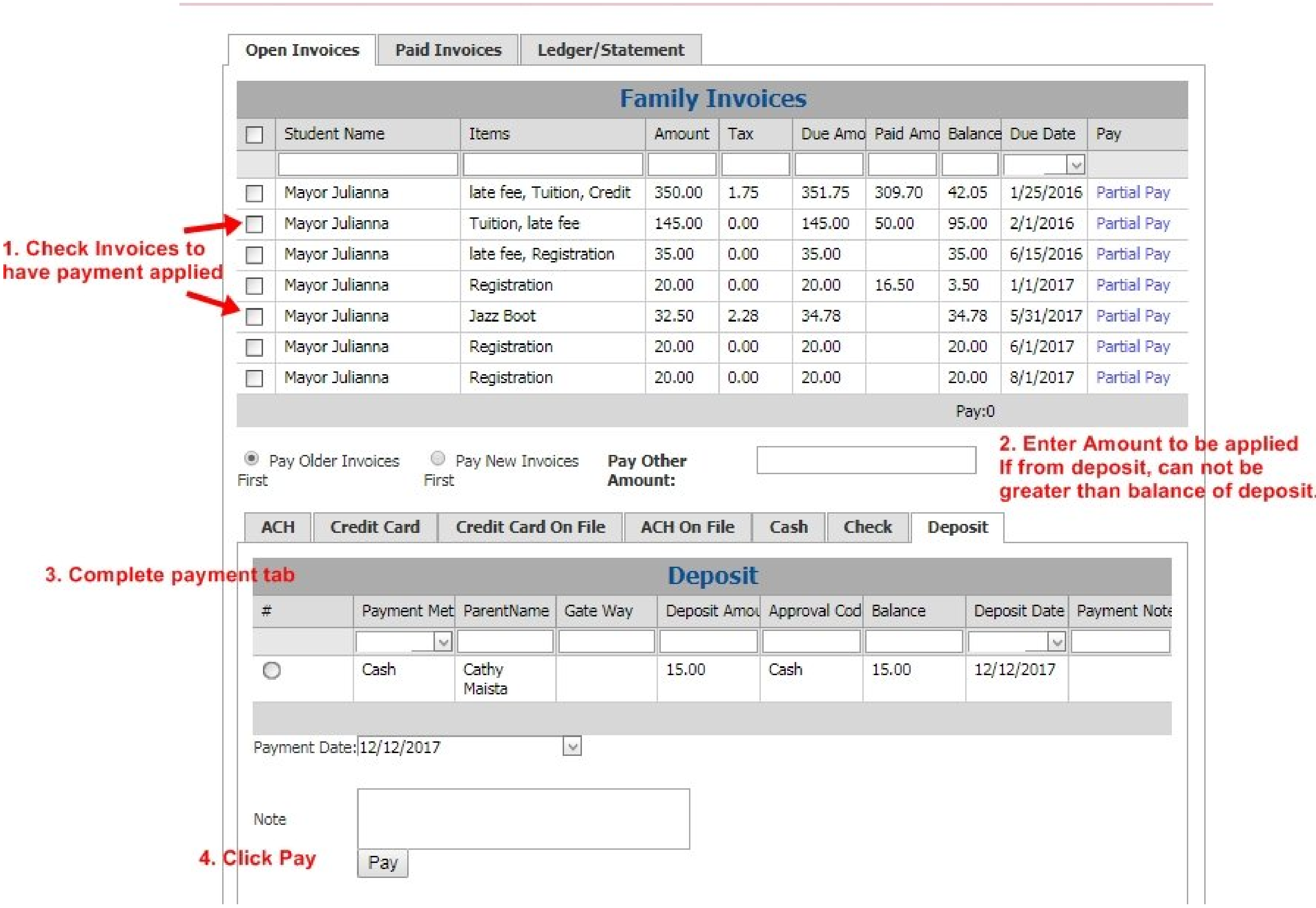
#	Payment	Student Name	Items	Amount	Tax	Paid Amount	Balance	Due Date	Paid Date	Created Date
	Partial Paid	Mayor Julianna	Jazz Boot	32.50	2.28	15.00	19.78	5/31/2017		3/30/2017

Close

New Feature View/Pay Family Invoices with Partial Payments

You can now set the amount to be applied to invoices in the billing-View/Pay Family Invoices screen.

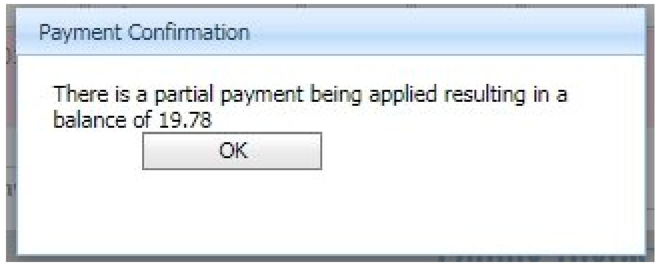
To turn on this feature, go to Admin-Gateway tab.
Click Edit on the Gateway line.
There is a checkbox on the bottom left side saying Show Admin Partial Payment Text
Check it if you want this feature. Then click Update.



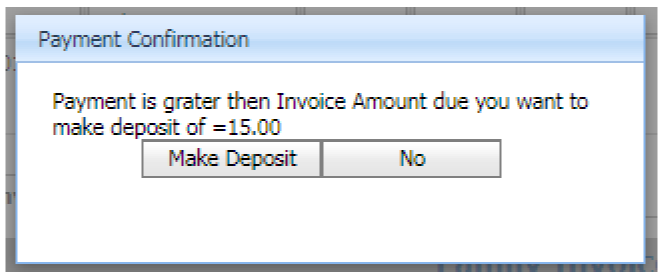
To use, if you are receiving a payment other than the total Pay of the invoices checked, you can enter this amount in the Pay Other Amount box.
Select how you want the partial payment determined. (It defaults to pay the older due date invoices first of the invoices selected.)
Enter the payment information and click pay.

> ! If you are paying from a deposit, you enter the balance of the deposit in the other amount box to apply it to sibling invoices.

- If the amount entered is less than the total balance of the invoices selected, you will see the following message.

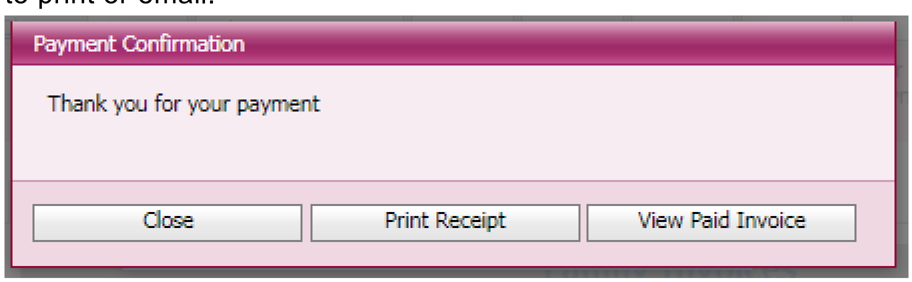


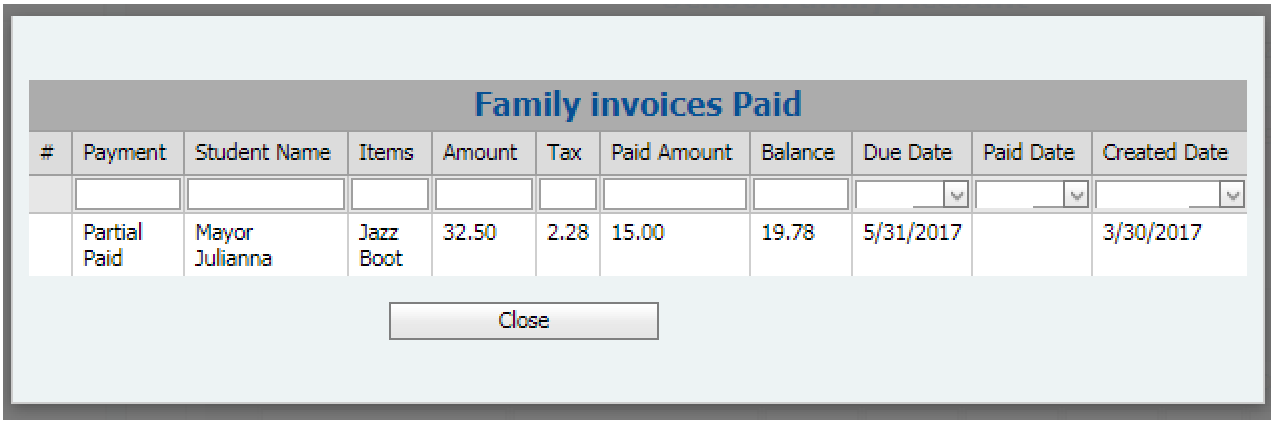
- If you enter an amount greater than the balance of the invoices, it will ask if you want the overage to create a deposit.



  If you answer no to making a deposit, the system will bring you back to the invoice list. No payment has been made.

- You are given an option to View the payments applied after the amount is processed. You may also create a receipt to print or email.





Family invoices Paid

#	Payment	Student Name	Items	Amount	Tax	Paid Amount	Balance	Due Date	Paid Date	Created Date
	Partial Paid	Mayor Julianna	Jazz Boot	32.50	2.28	15.00	19.78	5/31/2017		3/30/2017

Close

✻ You may still use the partial pay option if you wish to determine how payment is applied to invoices with multiple charges.

How to Partial Pay an individual invoice

If you wish to designate how the payment is applied to an individual invoice, usually if more than 1 income category is charged.
Select Partial Pay on the right side of the invoice you wish to designate payment to. – You will be brought to a screen for a single invoice. It will not apply payment to any other invoice. Then follow [How to Partial Pay an individual invoice](#).

Enter Deposit From Family Account

Why Create a Deposit?

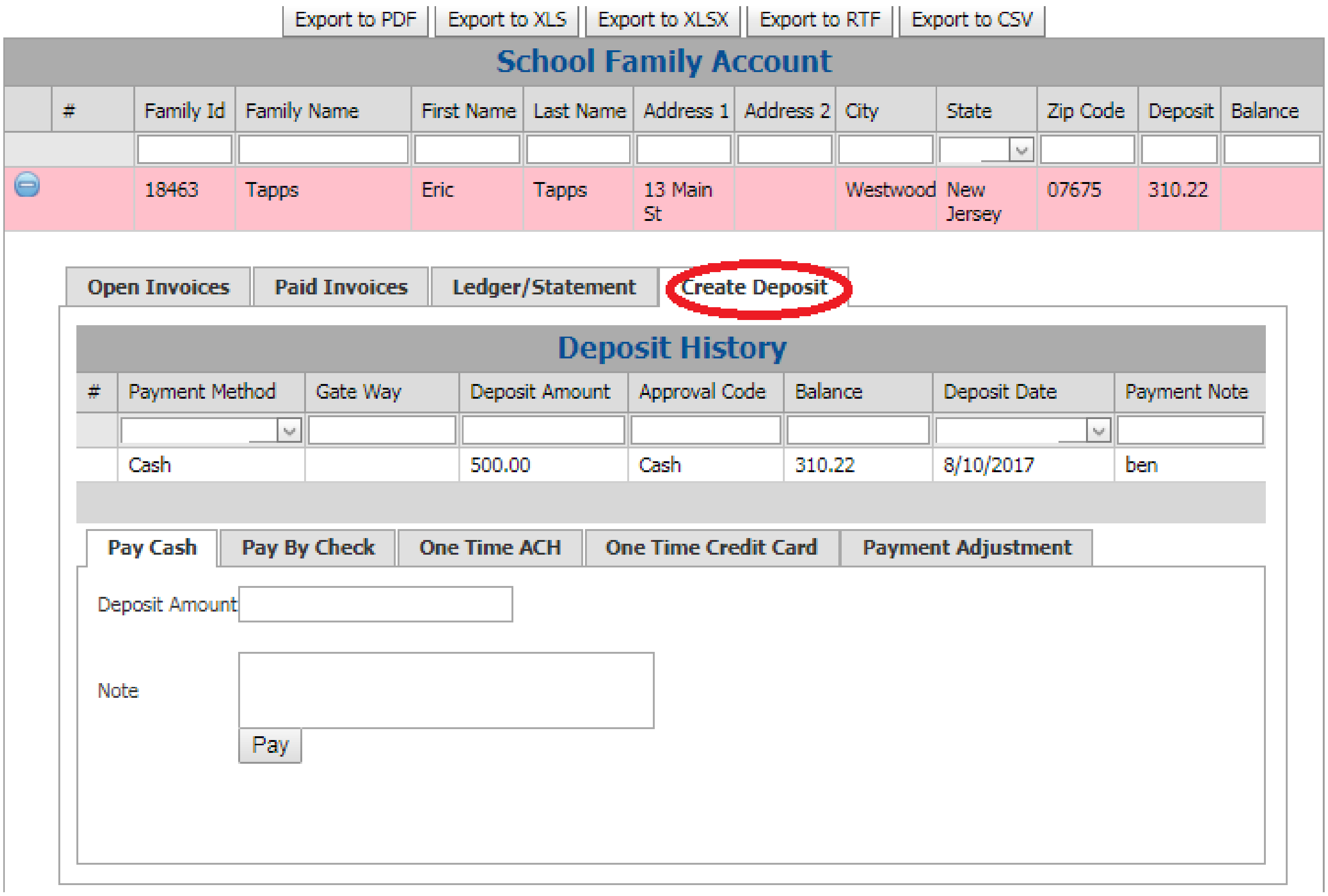
Think of deposits as a credit balance on a student account. Once created, deposits can be used as form of payment on invoices.

Situations where Deposits should be utilized:

- An overpayment is made
- You must apply a credit adjustment to an Invoice
- An account wants to pay ahead for something before you have invoiced it (Costumes, competition fees, etc)
- You want to give a credit to a studio volunteer
- If a class is dropped and you already invoiced Tuition

How to create a deposit from the Family Account

- Go to Billing / View Pay Family Invoices
- Open the Family
- Click the Create Deposit tab
  You will see a history of all deposits and it will allow you to enter a deposit.
- Click the tab for how the deposit is being made
- Enter the information
- Click Pay



Once the deposit is created, that account will show in PINK in all Billing screens (Viewing Invoices, Creating Invoices, Create Batch Invoice, View Parent Deposit).

Specific Family Ledger/Statement

You can see how a family invoices and payments have been posted under the View/Pay Family Invoices

You can hit the plus in front of any family listed in View/Pay Family Invoices to show three detail tabs.

The first tab lists any invoices for the family that has an Open status. They may have had a partial payment, but have a balance and therefore the invoice is still OPEN.

The second tab lists all PAID (Closed) invoices. These invoices have a zero balance.

There is now a Third tab which lets you pull the ledger of all invoices and payments for the family.
At the top of the tab, you can set the date parameters to see the invoices and payments you want.

Invoices paid from date will allow you to show any fully paid invoice that was paid from that date to today.
Invoices due until will show any invoice due up until the date entered.
If an invoice is still open, whether it has a partial payment or not, if it was due prior to the Due until date, it will be listed.

You may generate a statement to Print or Email for the family. When Ledger data is displayed in the table, you can click Print Statement to see the full statement created for that family, or Email statement to have it sent to the family email address in the family link page and the studio will also receive a copy.

> ✻ Prior to creating, You may customize the statement template in Admin-School Setting Types-Alert Types- FamilyInvoice

compudance

To	*Notes*
Beat Amy 101 fine street union, Alabama 07777	

Account Activity between Dec 1 2017 and Dec 30 2017. Total Due: 156.45

Student Name		Category	Invoice Amount	Tax	Paid Amount	Info
Beat, Sharah	Due:Oct 25 2016	Registration/Deposit	15.00	0.00		October
Beat, Sharah	Paid:Dec 28 2017	Registration/Deposit			15.00	Cash 74.85
Beat, Sharah	Due:Jan 8 2017	Tuition	57.00	2.85		January
Beat, Sharah	Paid:Dec 28 2017	Tuition			59.85	Cash 74.85
Beat, Sharah	Due:Jan 22 2017	Tuition	57.00	2.85		January
Beat, Sharah	Due:Jun 14 2017	Tuition	92.00	4.60		July

Deposit

Why Create a Deposit?

Think of deposits as a credit balance on a student account. Once created, deposits can be used as form of payment on invoices.

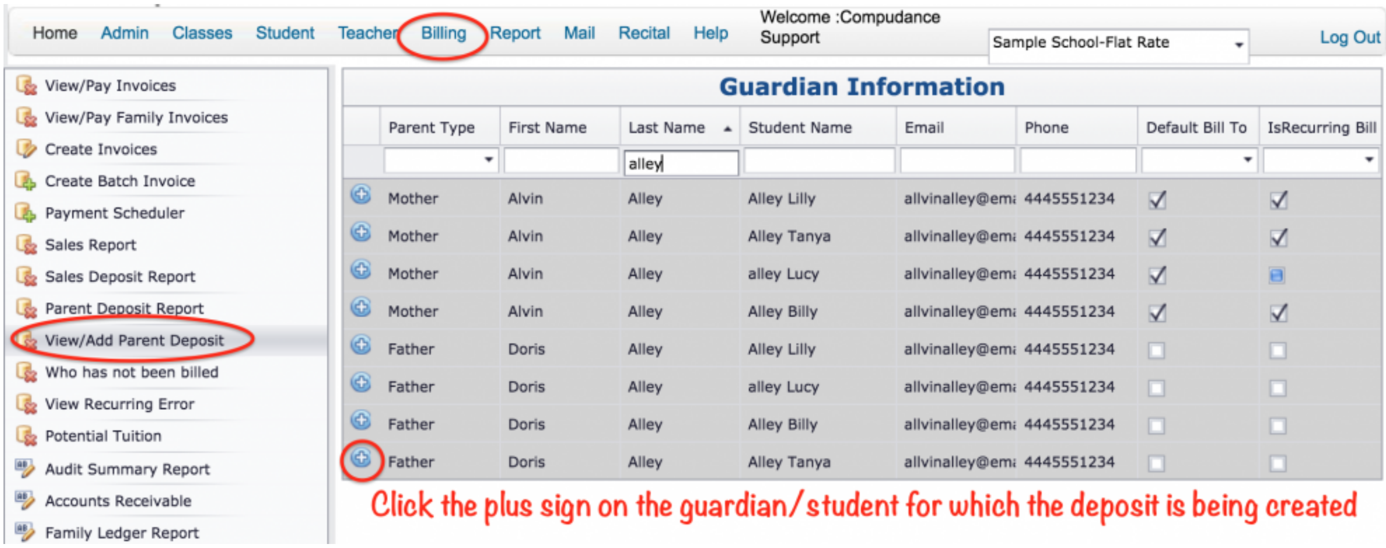
Situations where Deposits should be utilized:

- An overpayment is made
- You must apply a credit adjustment to an Invoice
- An account wants to pay ahead for something before you have invoiced it (Costumes, competition fees, etc)
- You want to give a credit to a studio volunteer
- If a class is dropped and you already invoiced Tuition

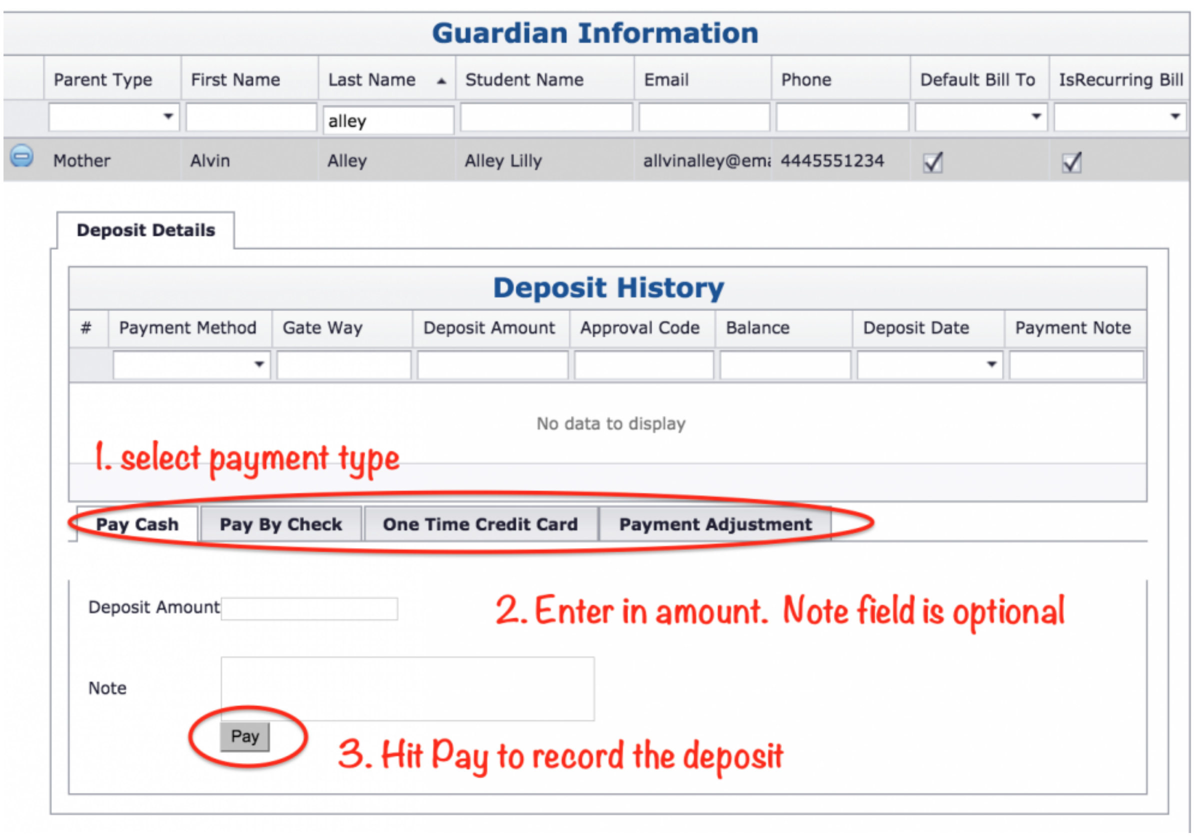
How to create a deposit

Deposits are recorded at the student and guardian level. This means, you will select not only the student but also the student's guardian to apply the deposit. This is helpful for non-traditional family situations. Perhaps the parents are divorced, or a grandparent pays. The monies are attributed to the specific guardian.

Note: A student will be listed for each guardian on their account. Therefore, it will look like duplicate students are listed but actually it is the guardian that is different.



Click the plus sign on the appropriate student/guardian.

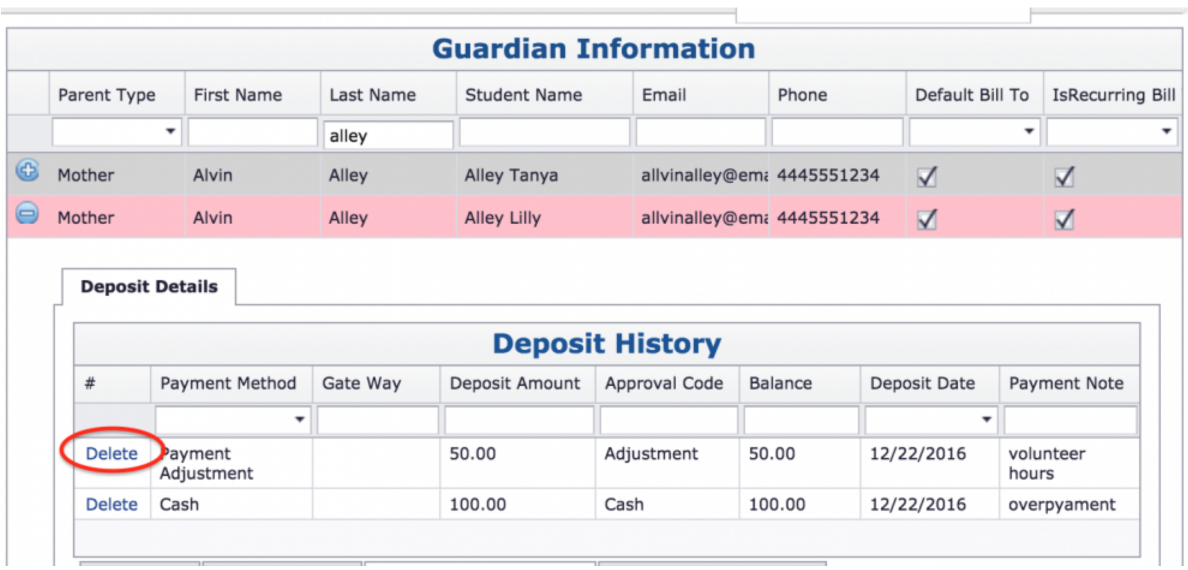


Tip!	Payment Adjustments, are not considered reportable income. Use this payment type if you are crediting volunteer hours, have fundraising or some other adjustment that is not truly income.

Once the deposit is created, that account will show in PINK in all Billing screens (Viewing Invoices, Creating Invoices, Create Batch Invoice, View Parent Deposit).

Delete a Deposit that has not already been applied to an invoice

- Go to Billing, View/Add Parent Deposit,
- search for the student and click plus sign
- Deposits will be listed. Delete function on left side. Click delete



Delete deposit that's been applied to invoice

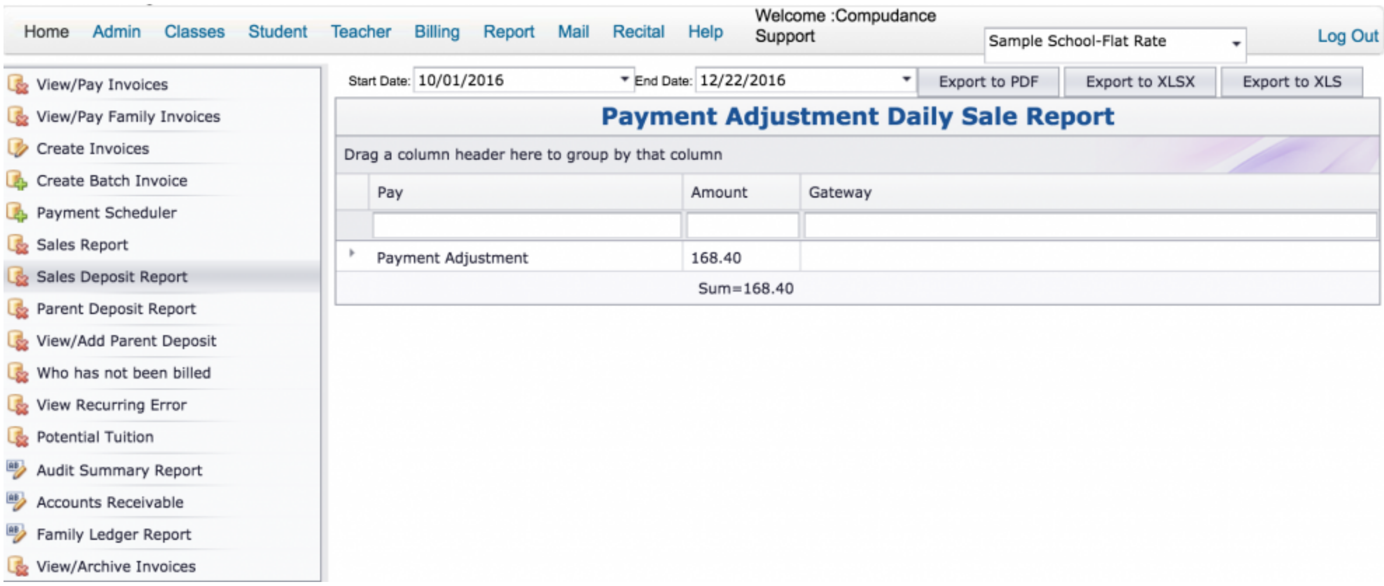
If a deposit has been applied to an invoice, the deposit can not be deleted without first deleting the payment off the invoice. Once the payment delete is complete, the deposit is then able to be deleted.

Sales Deposit Report

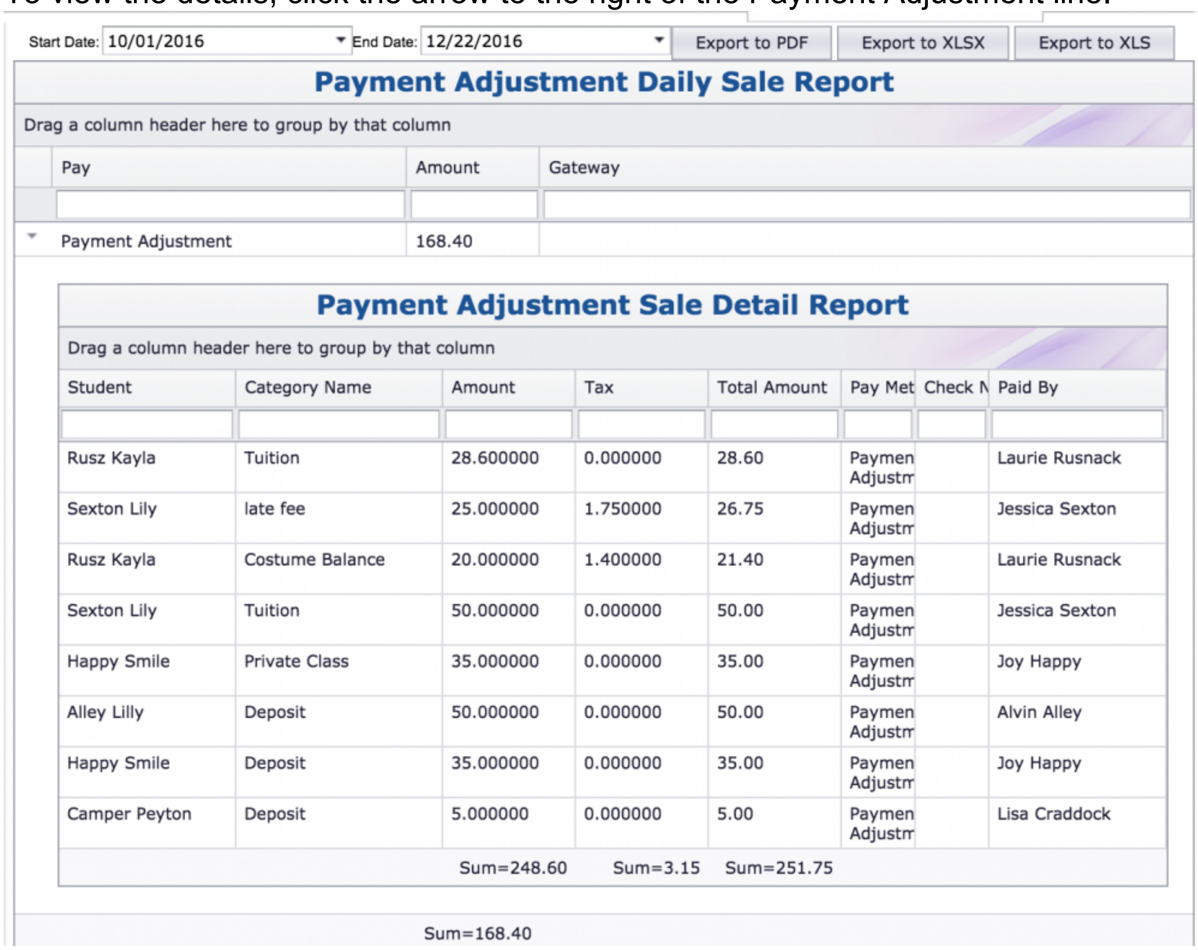
Sales Deposit Report

The “Sales Deposit Report” is an accounting of all credits applied from deposits. These are all considered “Payment Adjustments” as the money has already been accounted for when the money was first posted.

Enter a date range and hit FIND. The results will be displayed below.



To view the details, click the arrow to the right of the Payment Adjustment line.



Start Date: 10/01/2016 End Date: 12/22/2016 Export to PDF Export to XLSX Export to XLS

Payment Adjustment Daily Sale Report

Drag a column header here to group by that column

Pay	Amount	Gateway
Payment Adjustment	168.40	

Payment Adjustment Sale Detail Report

Drag a column header here to group by that column

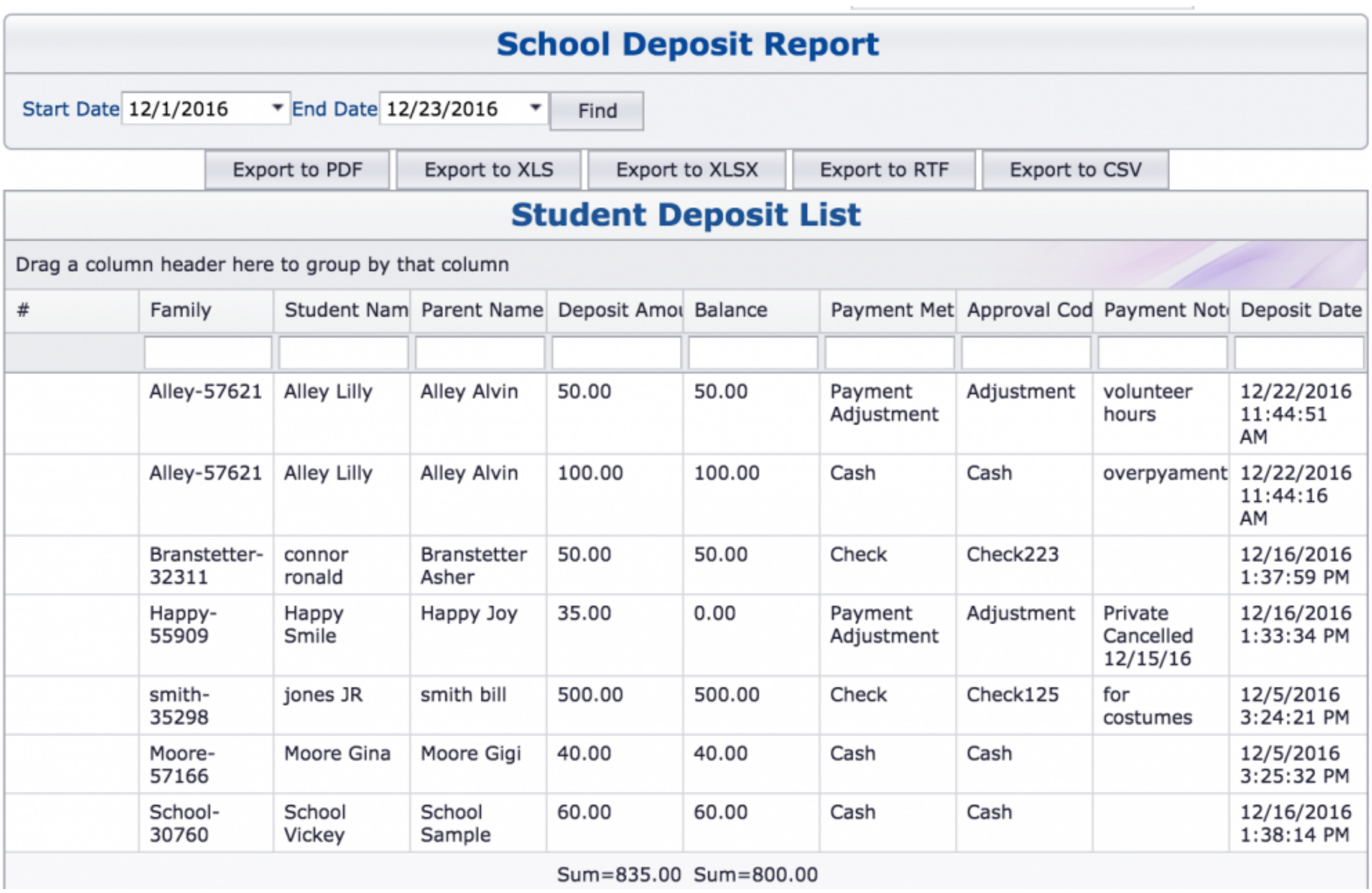
Student	Category Name	Amount	Tax	Total Amount	Pay Met	Check N	Paid By
Rusz Kayla	Tuition	28.600000	0.000000	28.60	Paymen Adjustm		Laurie Rusnack
Sexton Lily	late fee	25.000000	1.750000	26.75	Paymen Adjustm		Jessica Sexton
Rusz Kayla	Costume Balance	20.000000	1.400000	21.40	Paymen Adjustm		Laurie Rusnack
Sexton Lily	Tuition	50.000000	0.000000	50.00	Paymen Adjustm		Jessica Sexton
Happy Smile	Private Class	35.000000	0.000000	35.00	Paymen Adjustm		Joy Happy
Alley Lilly	Deposit	50.000000	0.000000	50.00	Paymen Adjustm		Alvin Alley
Happy Smile	Deposit	35.000000	0.000000	35.00	Paymen Adjustm		Joy Happy
Camper Peyton	Deposit	5.000000	0.000000	5.00	Paymen Adjustm		Lisa Craddock
		Sum=248.60	Sum=3.15	Sum=251.75			

Sum=168.40

Parent Deposit Report

Parent Deposit Report

The “Parent Deposit Report” shows you all Cash, Check, Credit Card or ACH Payments posted as a deposit. Click “Billing” enter your “Start Date” and “End Date” and hit FIND. The report will show you all deposits entered in the time period you selected. Totals are included and date and time deposit posted.


School Deposit Report

Start Date 12/1/2016 End Date 12/23/2016 Find

Export to PDF | Export to XLS | Export to XLSX | Export to RTF | Export to CSV

Student Deposit List

Drag a column header here to group by that column

#	Family	Student Nam	Parent Name	Deposit Amou	Balance	Payment Met	Approval Cod	Payment Note	Deposit Date
	Alley-57621	Alley Lilly	Alley Alvin	50.00	50.00	Payment Adjustment	Adjustment	volunteer hours	12/22/2016 11:44:51 AM
	Alley-57621	Alley Lilly	Alley Alvin	100.00	100.00	Cash	Cash	overpyament	12/22/2016 11:44:16 AM
	Branstetter-32311	connor ronald	Branstetter Asher	50.00	50.00	Check	Check223		12/16/2016 1:37:59 PM
	Happy-55909	Happy Smile	Happy Joy	35.00	0.00	Payment Adjustment	Adjustment	Private Cancelled 12/15/16	12/16/2016 1:33:34 PM
	smith-35298	jones JR	smith bill	500.00	500.00	Check	Check125	for costumes	12/5/2016 3:24:21 PM
	Moore-57166	Moore Gina	Moore Gigi	40.00	40.00	Cash	Cash		12/5/2016 3:25:32 PM
	School-30760	School Vickey	School Sample	60.00	60.00	Cash	Cash		12/16/2016 1:38:14 PM
				Sum=835.00	Sum=800.00				

To print report, you will first need to export to Excel. Click the export to XLS or XLSX button. A copy of the report will be downloaded to your computer.

Auto-Payment

Auto-pay is a feature that allows payments to automatically run on a certain day.

This feature can only be enabled by the Compudance team and requires the studio have an account with one of our integrated payment processors.

PaySafe

	For USA Businesses	Outside the USA
Our Contact:	Joanna Diaz	Zachary Schneiderman
Phone:	1 949 788 1010 ×131	1 514 380 2700 ext. 8292
Email:	joanna.diaz@paysafe.com	zachary.schneiderman@paysafe.com

They prefer email as contact method.

The studio can set the time of day they want their autopay to occur. See Gateway.

How Auto-pay works:

- Studio creates an invoice
- the invoice gets added to the payment scheduler with the payment being scheduled for the Invoice Due Date. (Studio can change the schedule date in *Payment Scheduler* .)
- On the scheduled date, the due amount will automatically be charged to the family's credit card or checking account.
- The Payment is then posted to the invoice, changing the status to Paid.

Payment Scheduler

All pending payments can be managed through the Payment Scheduler.

Auto-pay FAQs:

Where is the credit card or ACH info stored?

The payment information is entered through the family link account (not the student). It is saved in the PaymentXP vault.

How can I remove a previously stored account for a family?

[Follow these directions. You will need to access the PaymentXP system.]

How can I stop a payment from happening in Compudance?

If the autopay system for this invoice has not yet started,

- You can pay the invoice which will remove it from the autopay scheduler.
- You can manually remove the invoice from the scheduler by going to Billing->Payment Scheduler. Find the specific invoice you wish to remove and click Delete in front of that line.
- You can delay the payment by clicking Edit in front of the line in payment scheduler and changing the Scheduled Date. Click Update.

How can I check if a payment was successfully processed?

All payments that are successful will automatically be posted in the CompuDance system.
You can run the Sales Report or any other screen to see them.
Any errors are reported in the View Reoccurring Error Report

> ! If the Autopay Account is an ACH, it may be between 5 and 10 days later that you find the payment has not completed. We recommend that you turn on Email alerts from your processor to let you know if a payment fails. You may also run the Completed transaction report from your processor to confirm payments of this nature.

Our system will not know if a payment fails at a later date and will still show the invoice is paid unless you change it. This includes a credit card reversal by the card holder and an insufficient funds from ACH.

Recurring Error Report

The Recurring Error Report will show every time an Autopay process attempted to be performed and the reason it failed.

In order to see this report, you must have Autopay turned on. This must be requested to CompuDance.

After you have Autopayments process you can view this Report in Billing -> View Recurring Error.
Here is an example of the report.
You can group , filter and sort this report.

Drag a column header here to group by that column

#	Account Id	Last Name	First Name	Family Acount Name	Created Date	Transaction Amount	Process Name	Response Message
	14888	Confin	Brian	Confin	9/1/2016	0.0000	AutoPay	Account is not setup with Meritus
	14888	Confin	Brian	Confin	11/1/2016	0.0000	AutoPay	Account is not setup with Meritus
	16915	Benitez	Mary	Benitez	9/27/2016	26.0000	CC Charge Process	DECLINED
	16915	Benitez	Mary	Benitez	12/1/2016	70.0000	CC Charge Process	DECLINED
	18193	White	Keri	White-Dani&Keri	9/1/2016	0.0000	AutoPay	Account is not setup with Meritus
	18193	White	Keri	White-Dani&Keri	10/1/2016	0.0000	AutoPay	Account is not setup with Meritus
	20130	Gold	Elana	Gold	8/1/2016	0.0000	AutoPay	Account is not setup with Meritus
	21095	COWART	Jane	COWART	12/1/2016	72.0000	CC Charge Process	INVALID CARD NUMBER
	21794	CONNELL	DENISE	CONNELL	9/1/2016	0.0000	AutoPay	Account is not setup with Meritus
	22820	Bermud	Laura	Bermud	12/22/2016	0.0000	AutoPay	Account is not setup with Meritus

There are different error reasons that may be posted.

Account is Not Setup with Merritus means there is no payment account saved on file for the family.
DECLINED is the Credit Card company declined the payment.
INVALID CARD NUMBER means the card information on file does not exist.
blank is shown for an ACH process. Keep in mind ACH can be reversed like a check for Insufficient Funds up to 7 days after the approval. If this occurs you will be notified by the payment processor. You will have to make changes in CompuDance of the reversal.

Reversing Payments

You may need to reverse a payment on an invoice.

- If the payment was applied to the wrong invoice
- If the check/ACH was denied for Insufficient Funds
- If a payment was reversed
- If an item is returned

Each Studio can chose their procedure for these occurances.

You may chose to:
Delete the Payment – Go to View /Pay Invoices. Find the invoice the Payment was applied. Click the Plus to see the details of the invoice. Go to the Payment Tab. Click Delete on the right side for that payment. The invoice will now be open and show the balance. If the payment deleted was from deposit, the amount will return to the deposit balance.

Add an Additional Charge – If the invoice is Open, you can add an additional charge to the invoice.

Create a New Invoice

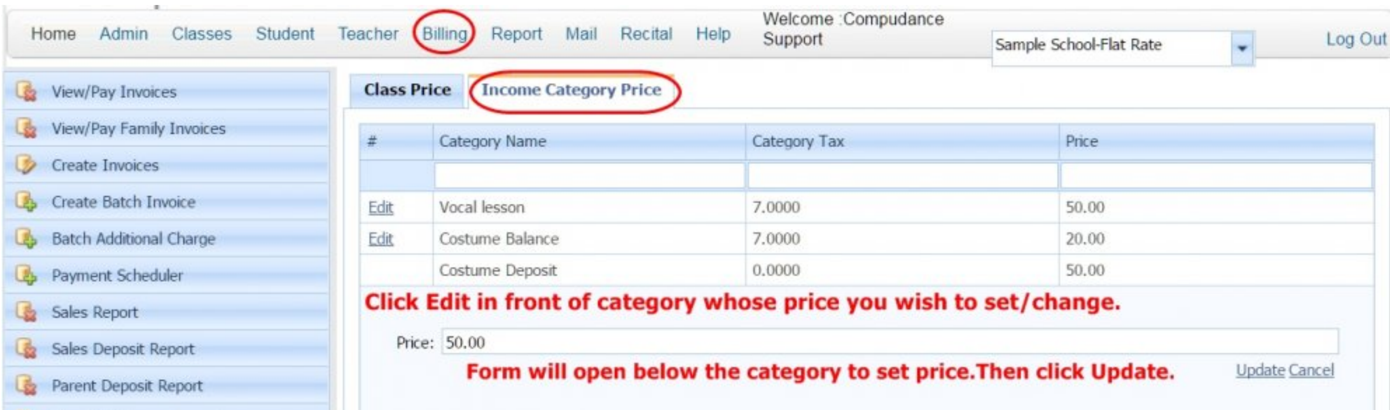
If you wish to discuss any other options you would prefer, please contact us.

Income Category Price

Income Categories

Creating new income categories is done through ADMIN ->School Setting Types -> Income Categories.

Default Pricing for all of your categories are set in the Billing section-> Income Category Price tab.



Click Edit on any Category you want to add or edit a Price – Enter the price and Update. Changing the price will reflect on new invoices only, previous invoices will not be affected by the price change.

✻ Income Category Prices can also be overridden at the time Create Invoice is being used for an individual student.

Negative Charge Amounts

You do have the ability to enter a negative income category amount. Some studios will use these to display a discount on an invoice or to move a charge and payment from one income category to another. For example if you invoice for a Costume Deposit and then invoice for the full costume showing the costume deposit being a negative to show it applied on the invoice.

Class Price | **Income Category Price** | Tuition Class Number Price

#	Category Name	Category Tax	Price
	co		
Edit	Costume - Ballet	7.0000	75.00
Edit	Costume Deposit- Ballet	0.0000	-50.00

For example: The studio charges $75 for the Ballet Costume and needs to collect a 7% tax.
They already charged/collected a $50 deposit.
In order to collect the proper tax for the costume, the full amount needs to be invoiced as taxable.
You will then also apply a -$50.00 for the costume deposit to get the balance correct.

School Invoices

	Pay	Student Name	Items	Amount	Tax	Due Amo	Paid Amo	Balance	Due Date	Paid D	Status	#
			cos									Clear
	Pay Full | Partial Pay	Student Smple#1	Costume - Ballet, Costume Deposit- Ballet	25.00	5.25	30.25		30.25	2/28/2017		Open	Delete

Pay period: **02/20/17-02/20/17** Deposit Amount:

Invoice Details | Payment

Invoice Details

#	Qty	Item Name	Amount	Tax	Total Amount
	1	Costume - Ballet	75.00	5.25	80.25
	1	Costume Deposit- Ballet	-50.00	0.00	-50.00
			Sum=25.00	Sum=5.25	Sum=30.25

! If you want to use negative invoice charge amounts you must be careful in how you apply payments.
We recommend using Pay Full or Pay by Family Invoices (for balance) and the system will apply the payment correctly.
If you are applying a partial payment, keep in mind you must distribute the negative amount too or the invoice will go to a negative balance and stay open.

Please call us if you need assistance.

Billing Tuition Methods

CompuDance can be set to calculate your tuition or to be set by the studio for each student.
You may discuss your tuition calculation practices with us so we can direct you towards the easiest method or discuss you options.
CompuDance must set the type of tuition you wish to chose. You may change it, just let us know and we will help you do so.

Here is an overview on how each option works.

Calculated Tuition by Class Interval (Number of minutes / hours)

This option will have the system look at your class enrollments for each student. Calculate the amount of time the student is schedule for classes for a week time interval (the date range must be 7 days or the days in 1 week the studio is open)
One the total number of minutes are calculated for the student, the system will look at the charge amount for those minutes in the **Billing->Class Interval Price table.**
The system will then check the student and apply any discounts that may be noted on the student record.
You may preview the final tuitions calculated using the **Potential Tuition Report**
How to set up Interval Rates

Calculated Tuition by Class Number

The system will recognize the number of classes a student is enrolled in for a specific week time period.
It will then look at the charge amount for the classes in **Billing->Class Number Price** chart and add the amounts to reach the final tuition amount for that number of classes.
The system will then check the student and apply any discounts that may be noted on the student record.
You may preview the final tuitions calculated using the **Potential Tuition Report**
How to setup Class Number Prices

Flat Rate (Amount set by Studio)

The flat rate system allows the studio to enter the final tuition rate per student. **Student (Edit) Tuition field**
This system will allow different groups of students to have tuitions calculated in different time periods.
For example the studio may offer tuition to be billed by semester, monthly or weekly. Each student will be

entered at their rate. Then the bills will be created for their group.
How to enter Flat Rate tuition

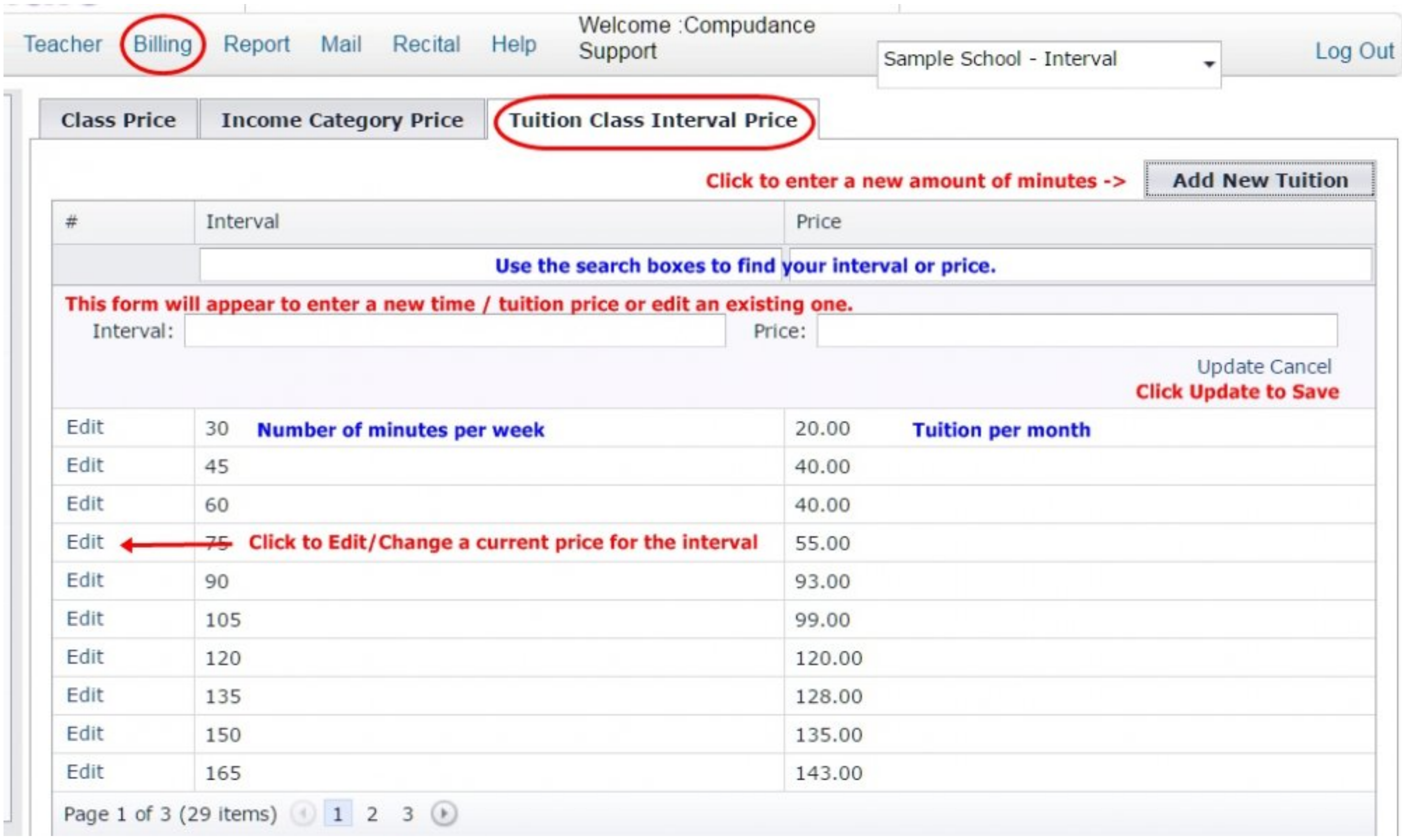
! All tuition invoicing needs to be created by the studio.

If you have any questions regarding your tuition structure, please contact us to discuss your options and the best fit for your school.

Calculated Tuition by Interval

Once we at CompuDance have set your system to be by Interval, you will be able to enter your tuition rates per amount of time.

Go to the Billing section and click on the third tab – **Class Interval price.**



To enter a tuition interval, click Add New Tuition.
Enter the number of minutes a student may take in 1 week in the interval box. Enter the tuition rate per month as a decimal or whole number. Click Update.
Repeat to enter the next time interval and tuition price.

> ✻ If you already have intervals entered we suggest you search for a time interval in minutes before clicking Add New Tuition.

You may only have each interval set as 1 price. Entered once.
You must have every interval in which a student may take. If you offer 45 minute classes, you must have intervals every 15 minutes.

If you have a tuition cap (max rate) you must enter every possible interval taken and just repeat the tuition amount above the cap.

If no tuition is entered for a specific interval a student is taking they will not get an invoice created.
Check the **potential tuition report** for the same time period you are creating tuition invoices.
Sort by the tuition column. If a tuition does not calculate, it should come to the top with the 100% discount students.
We recommend you check your tuition calculations regularly.

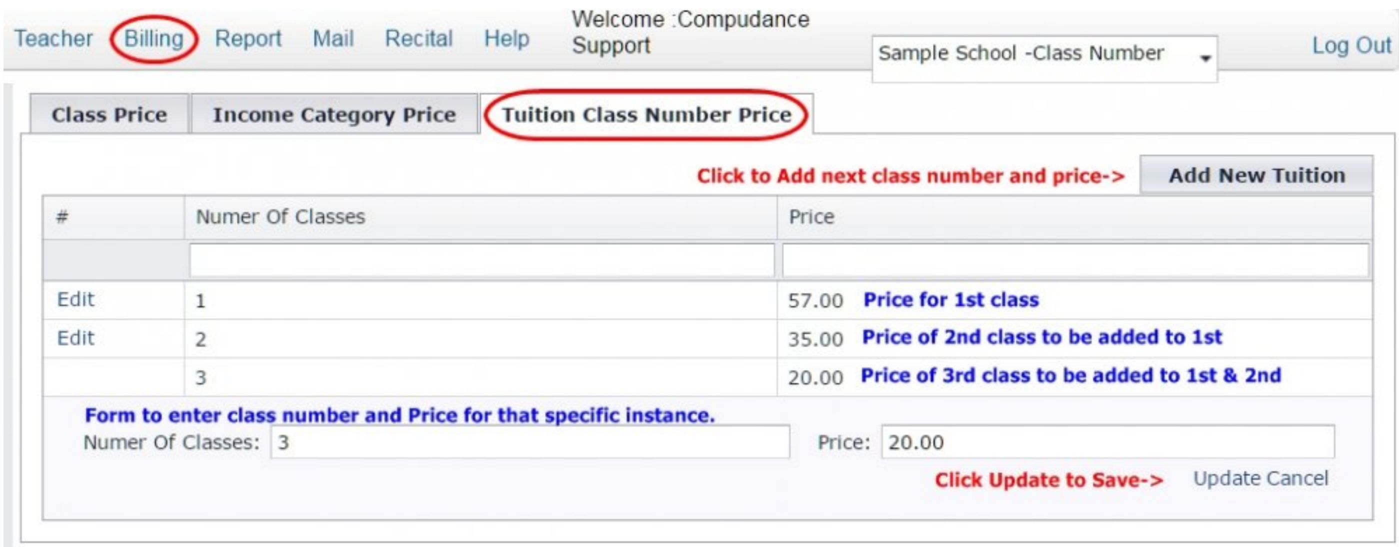
! If you are ending a season you must enter the end enrollment dates for the classes so the next season does not include the previous season’s classes.

Calculate Tuition by Class Number

The system will calculate a student's tuition by the number of classes a student takes in a week.
It will then look at the Class Number Price tab to determine the tuition.

If you would like to use this type of calculation, you must contact CompuDance to set it for you. You can only have one type of tuition calculation for the entire studio database.

Go to Billing-> **Class Number Price tab**
The class number price lets the studio set the price for the first class. You then set the price for the second class which will be added to the first when calculated.



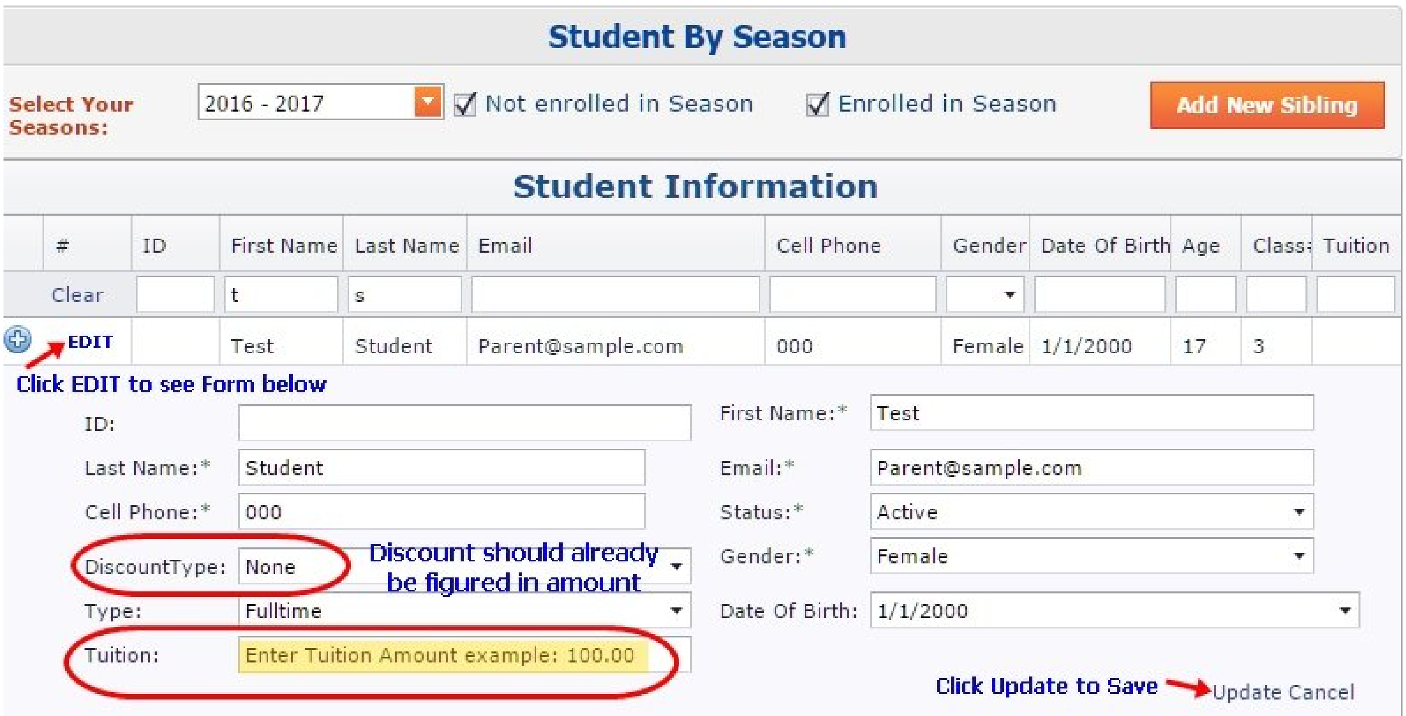
If a student takes 3 classes, the system will add the price of 1st class+price of 2nd class+ price of 3rd class

You may enter in Discounts on the specific student to be automatically taken off of the tuition rate when calculated.

Flat Rate / Studio Entered Tuition

If you wish to calculate the tuition rates outside of the CompuDance System, we can set your studio up as a Flat rate system.

This will allow the studio to enter in the tuition amount on each student record.
Go to Student. **Edit the student** in the bottom of the **first column you will see Tuition.**
Enter in the amount as a whole number or decimal for the *final tuition amount to be invoiced for this student.*
(No further discounts are to be applied.)
Click Update.



A flat rate tuition is useful if you have many different discount types utilized to each student.
If the studio allows the students to be invoiced in different structures.
For example if the studio offers a price scale for semester students and a different price scale for monthly students.
1 class per week may be $50 for the month but $120 for a semester or 3 months.

If you have any questions regarding your tuition structure, please contact us to discuss your options and the best fit for your school.

Student and Sibling Discounts in Calculated Tuition

Discounts are entered in the main Student record.
The discount is automatically applied to **only calculated tuition.**

Go to the Student Section
Find the student
Click Edit for the Student

To have a student not get invoices tuition, you will edit the student record to be 100% discount. (Discount type Percentage, Discount 100.) This may be used for scholarships or if a student pays the full year in advance.

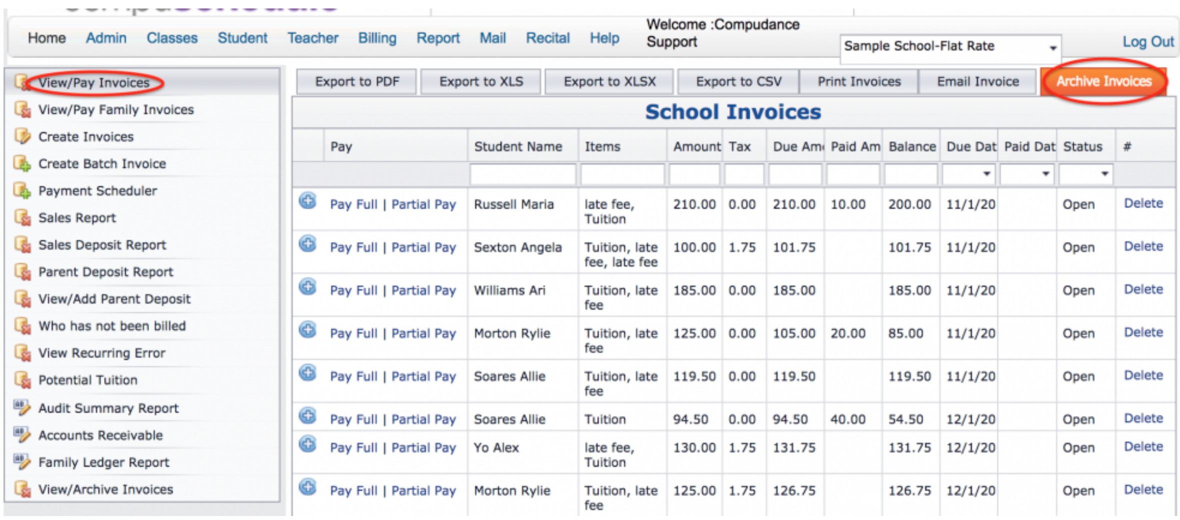
To give a $10 discount for a sibling discount, or any other reason, edit the student and set discount type to Fixed, discount 10.00.

If you need assistance with how to apply a specific discount, please contact us with the details.

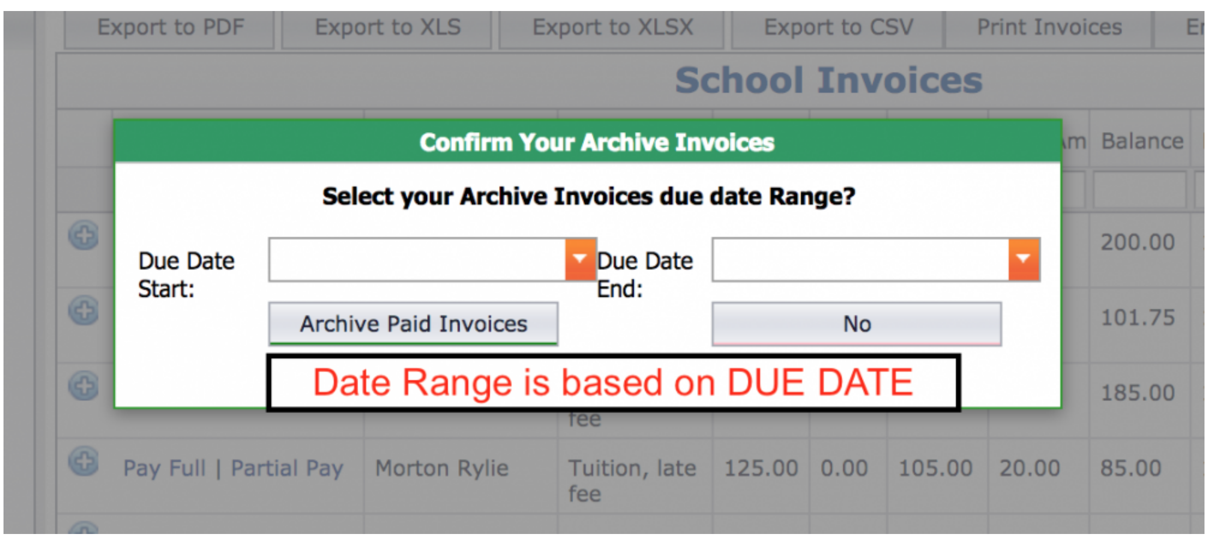
Archive Invoices

Invoices can be archived whenever necessary. It is up to the studio to decide when and how often to archive invoices. However, only **FULLY PAID** invoices will be archived. If there is any balance on the invoice it **can not** be archived.

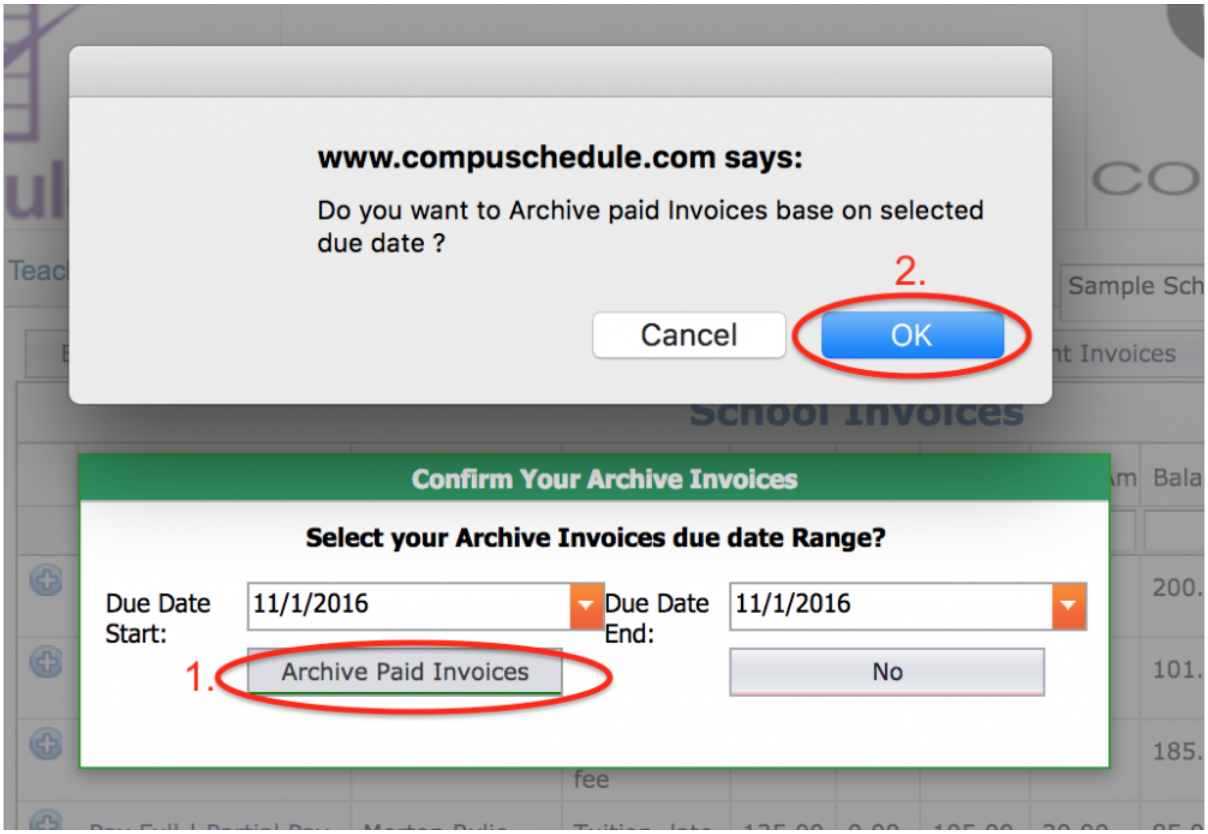
Go to Billing menu and select View/Pay Invoices. Click the orange button **ARCHIVE INVOICE**



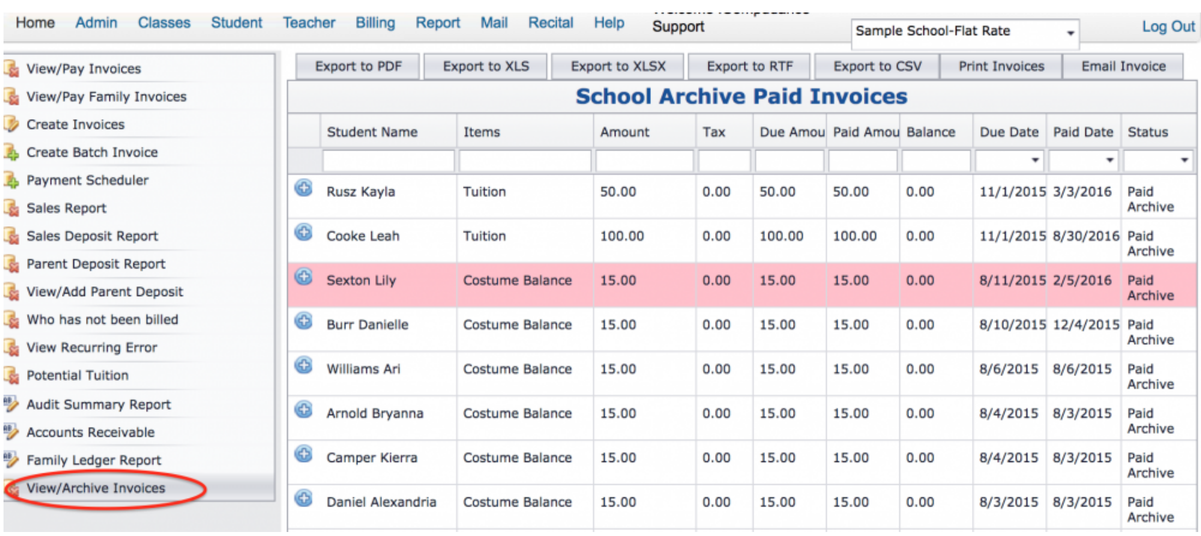
Determine the date range of the invoices you want to archive. The Date Range refers to the invoice **due date**.



Enter the desired Date Range and hit the Archive button. You will need to confirm your selection.



To view archived invoices, go to Billing menu, View/pay invoices. From left side menu, click on View Archive invoices.



Student Name	Items	Amount	Tax	Due Amou	Paid Amou	Balance	Due Date	Paid Date	Status
Rusz Kayla	Tuition	50.00	0.00	50.00	50.00	0.00	11/1/2015	3/3/2016	Paid Archive
Cooke Leah	Tuition	100.00	0.00	100.00	100.00	0.00	11/1/2015	8/30/2016	Paid Archive
Sexton Lily	Costume Balance	15.00	0.00	15.00	15.00	0.00	8/11/2015	2/5/2016	Paid Archive
Burr Danielle	Costume Balance	15.00	0.00	15.00	15.00	0.00	8/10/2015	12/4/2015	Paid Archive
Williams Ari	Costume Balance	15.00	0.00	15.00	15.00	0.00	8/6/2015	8/6/2015	Paid Archive
Arnold Bryanna	Costume Balance	15.00	0.00	15.00	15.00	0.00	8/4/2015	8/3/2015	Paid Archive
Camper Kierra	Costume Balance	15.00	0.00	15.00	15.00	0.00	8/4/2015	8/3/2015	Paid Archive
Daniel Alexandria	Costume Balance	15.00	0.00	15.00	15.00	0.00	8/3/2015	8/3/2015	Paid Archive

Billing Reports

The system includes reports that help you monitor daily sales, reconcile bank statements, government reporting for income and taxes, family statements, etc. All reports can be exported to excel for printing.

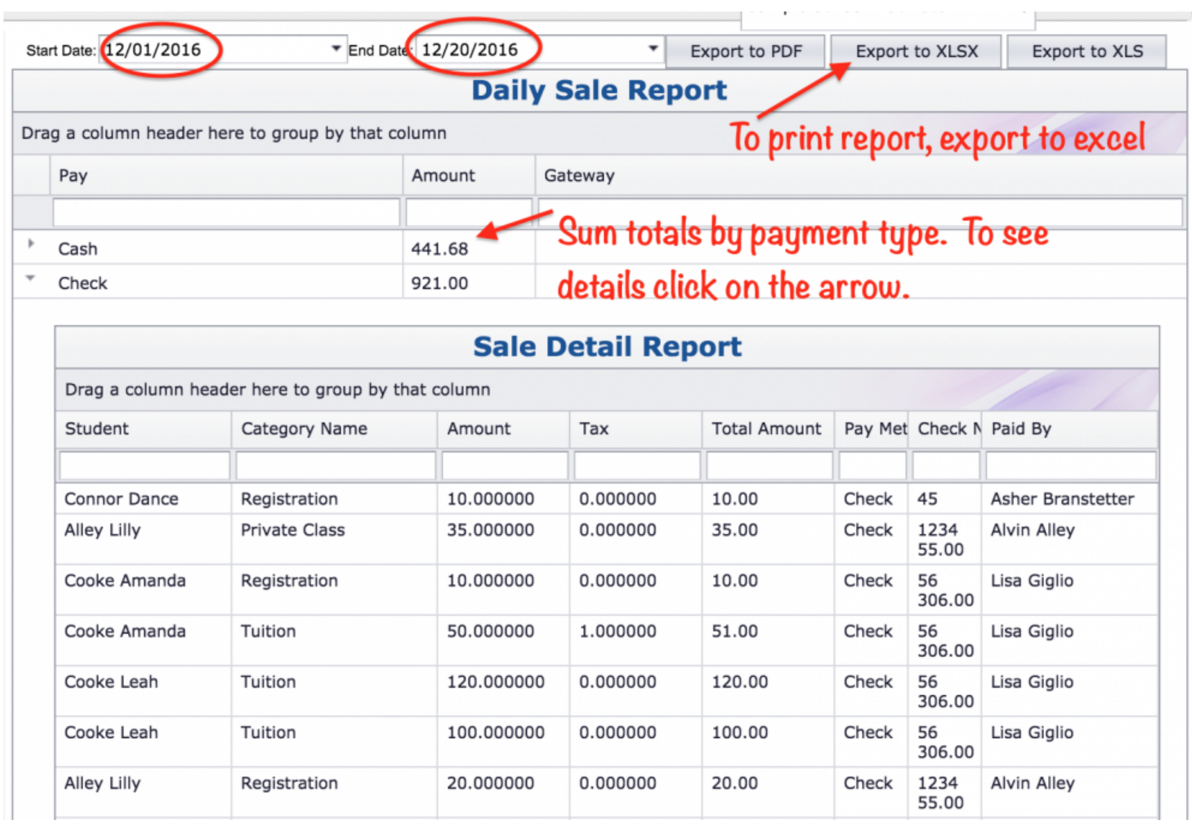
Sales Report

Sales Report

Why run the Sales report?

To reconcile your payment posting at the end of the day
To see the breakdown of Payments in any time period by Cash, Check, Credit Card and ACH
To find a specific Payment by Student, Guardian, check number or Amount
To get a total dollar amount paid for a specific Income Category, broken down by Payment Method
To find your Tax total for a specific time frame
To find all students/families that paid for a specific Income Category

To view the sales report go to the “Billing” tab click on the “Sales Report tab”. Enter the date range you want to review. The start/end dates filter based on the payment date. For today make your “Start Date” today and your end date tomorrow. Your Report will display. You can Export to PDF or Excel to see all detail. To view all detail on the Page – click to open your Payment Methods



Payment Types defined:

Payment Category	Where and How Payment was Performed
Cash	Cash payment applied from Family billing or student billing
Check	Check Payment applied from family billing or student billing
One-Time Pay	One-time Credit Card payment made through family or student billing
Schedule ACH Pay	ACH Payment processed through Auto-Pay
Schedule Pay	Credit Card payment processed through Auto-Pay
Pay by Family	Credit card payment made from Family billing or parent portal (using card on file)
Pay by Family ACH	ACH payment made from Family billing or parent portal (using account on file)

Audit Summary Report

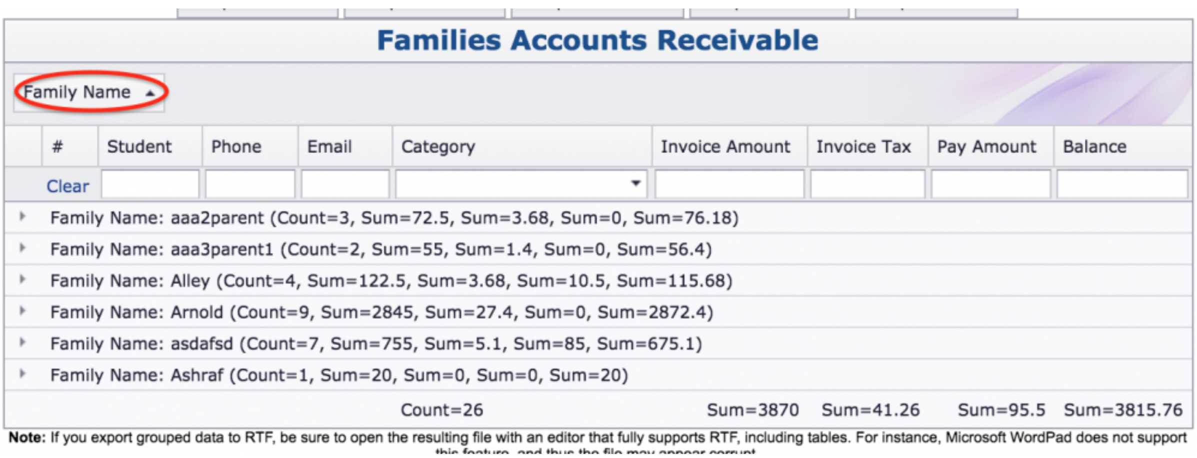
The audit summary report provides a sum total of each income category. It shows the total amount invoiced for each income category as well as any taxes collected and payments received. In addition to income categories, it also includes any deposits received.

To run the report, enter the desired date range. The system will include any invoices with a due date within the specified date range. If a printed copy is needed, the report can be exported as an excel spreadsheet or PDF document.

Category	Invoiced	Tax Invoiced	Paid	Adjustment Applied
Costume Balance	[illegible]	[illegible]	[illegible]	
Costume Deposit	100.00	0.00	50.00	
Jazz Boot	97.50	6.84	34.78	
late fee	25.00	1.75	50.00	26.75
Leotard	40.00	2.80	21.40	
Private Class	175.00	0.00	35.00	35.00
Registration	320.00	0.00	90.50	
Tuition			396.00	78.60
Vocal lesson	100.00	3.50		
Deposits Received			750.00	
	Sum=897.50	Sum=17.69	Sum=1,462.68	Sum=140.35

Tip!

Use grouping feature and filter boxes to narrow down your search. For example, group by family name to see a summary of receivables per family.



Families Accounts Receivable

Family Name

	#	Student	Phone	Email	Category	Invoice Amount	Invoice Tax	Pay Amount	Balance
	Clear								
	Family Name: aaa2parent (Count=3, Sum=72.5, Sum=3.68, Sum=0, Sum=76.18)								
	Family Name: aaa3parent1 (Count=2, Sum=55, Sum=1.4, Sum=0, Sum=56.4)								
	Family Name: Alley (Count=4, Sum=122.5, Sum=3.68, Sum=10.5, Sum=115.68)								
	Family Name: Arnold (Count=9, Sum=2845, Sum=27.4, Sum=0, Sum=2872.4)								
	Family Name: asdafsd (Count=7, Sum=755, Sum=5.1, Sum=85, Sum=675.1)								
	Family Name: Ashraf (Count=1, Sum=20, Sum=0, Sum=0, Sum=20)								
					Count=26	Sum=3870	Sum=41.26	Sum=95.5	Sum=3815.76

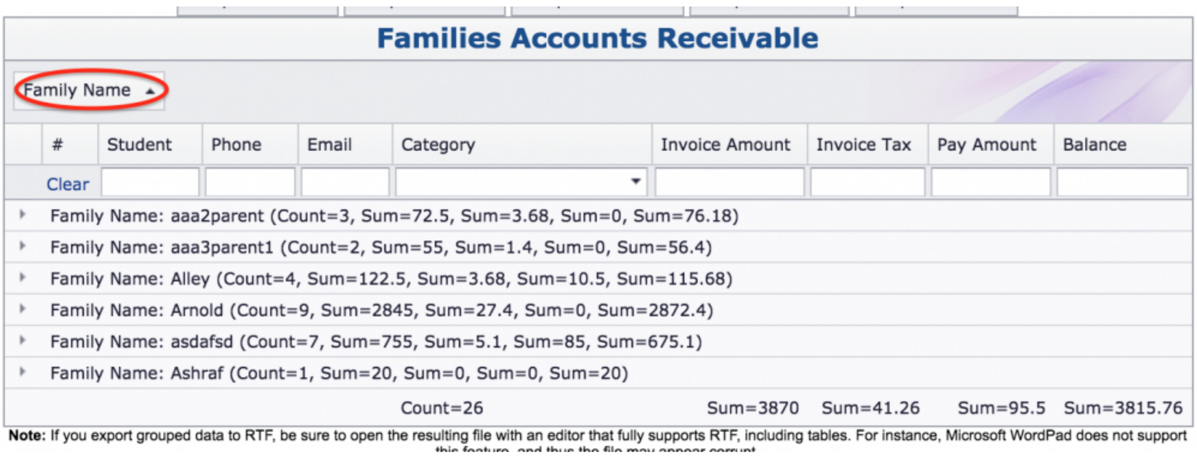
Note: If you export grouped data to RTF, be sure to open the resulting file with an editor that fully supports RTF, including tables. For instance, Microsoft WordPad does not support

Accounts Receivable

The accounts receivable report provides a sum total of each income category per student that has an open balance.

Here is a video demonstrating its flexibility. If you need a more detailed report use the Family Ledger Report

This report can be filtered, grouped or sorted as needed. The groups will sum all columns for you.



The report can be exported as an excel spreadsheet or PDF document.

Family Ledger Report/Statements

The Family Ledger Report itemizes all of the family's transactions based on a date range entered.

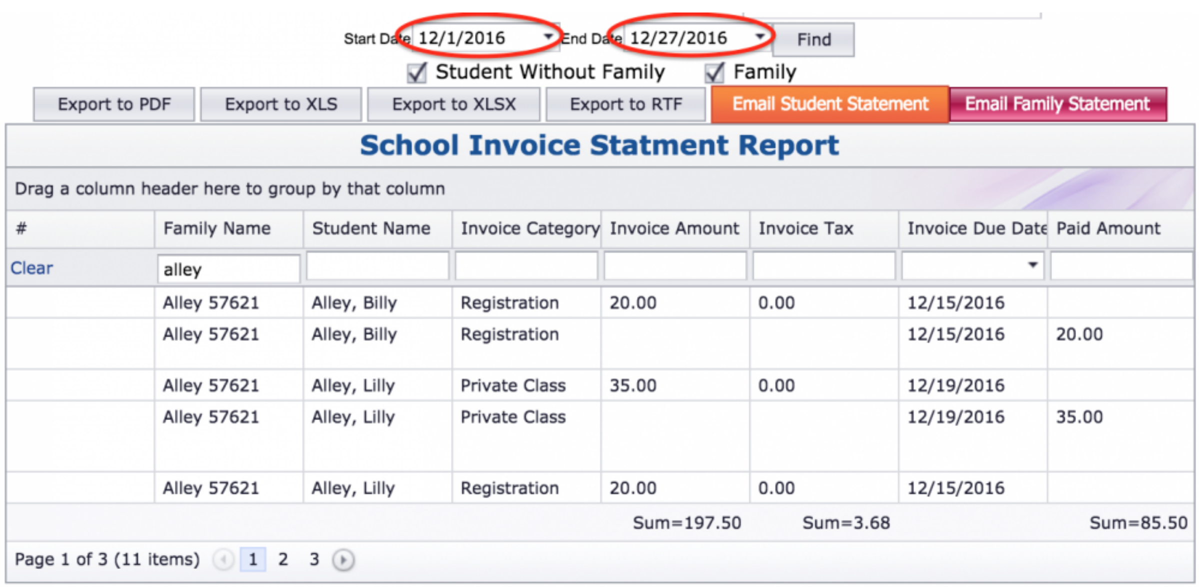
> ✻ You can use this report to send a collection of invoice charges and payments as a single email statement for a family or a student.

To create a statement, Go to Billing->Family Ledger Report

- Enter the date range you want to see invoices for. The start date will allow paid invoices to show with their payments as of that date.

  If you want to see only open invoices enter tomorrow's date as the start date.
- The end date will determine invoices shown up to that due date. So if you want to only show invoices due to the end of the month enter that date. If an invoice is open and due prior to the start date it will still be reflected on the report.
- The list will show all invoice and payment details for the studio.
- You may filter for a specific family, student, income category.



Start Date 12/1/2016 End Date 12/27/2016 Find

Student Without Family   Family

Export to PDF | Export to XLS | Export to XLSX | Export to RTF | Email Student Statement | Email Family Statement

School Invoice Statment Report

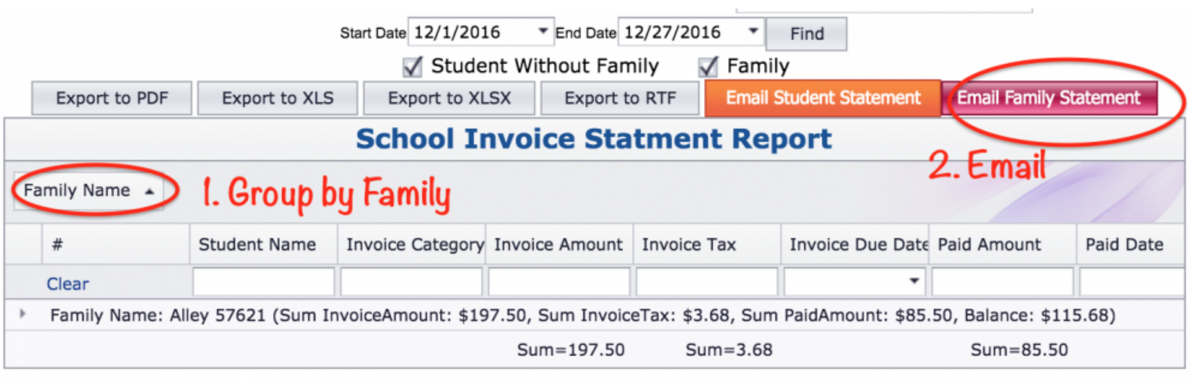
Drag a column header here to group by that column

#	Family Name	Student Name	Invoice Category	Invoice Amount	Invoice Tax	Invoice Due Date	Paid Amount
Clear	alley						
	Alley 57621	Alley, Billy	Registration	20.00	0.00	12/15/2016	
	Alley 57621	Alley, Billy	Registration			12/15/2016	20.00
	Alley 57621	Alley, Lilly	Private Class	35.00	0.00	12/19/2016	
	Alley 57621	Alley, Lilly	Private Class			12/19/2016	35.00
	Alley 57621	Alley, Lilly	Registration	20.00	0.00	12/15/2016	
				Sum=197.50	Sum=3.68		Sum=85.50

Page 1 of 3 (11 items) 1 2 3

Group by the type of statement you wish to send (If a student does not have a family-they can not receive a family statement. Uncheck Students without families to hide them as you send family statements. You can then only check this option to send the student statements.)

! Do not expand the groupings. If you do, each line shown will become a statement email and your families will receive multiple copies.



A popup box will appear telling you to group and not open the groups. Click OK.

The studio email address will get a copy of each statement sent. See Sample Below.

Note the Payment Notes are shown in the last column (Info) after the type of payment.
In the below example the 2nd line “paid in full” and last line “made partial payment” were written in the note

fields when processed.

To	*Notes*
Client Alvin Alley Address main street New York, New York 111111	**You can customize your statement!**

Account Activity between Dec 1 2016 and Dec 27 2016. Total Due: 115.68

Student Name		Category	Invoice Amount	Tax	Paid Amount	Info
Alley, Billy	Due:Dec 15 2016	Registration	20.00	0.00		December
Alley, Billy	Paid:Dec 19 2016	Registration			20.00	Cash paid in full
Alley, Lilly	Due:Dec 15 2016	Registration	20.00	0.00		December
Alley, Lilly	Paid:Dec 20 2016	Registration			20.00	Check 1234 55.00 making a payment
Alley, Lilly	Due:Dec 19 2016	Private Class	35.00	0.00		December
Alley, Lilly	Paid:Dec 20 2016	Private Class			35.00	Check 1234 55.00 making a payment
Alley, Lilly	Due:Dec 20 2016	Costume Deposit	50.00	0.00		December
Alley, Lilly	Due:Dec 20 2016	Jazz Boot	32.50	2.28		December
Alley, Lilly	Due:Dec 20 2016	Leotard	20.00	1.40		December
Alley, Tanya	Due:Dec 15 2016	Registration	20.00	0.00		December
Alley, Tanya	Paid:Dec 19 2016	Registration			10.50	Cash made partial payment

Create Statements of Open Invoice Balance only

To create Statements Go to Billing-Family Ledger Report
You need to know the maximum Due Date you wish to show open invoices.

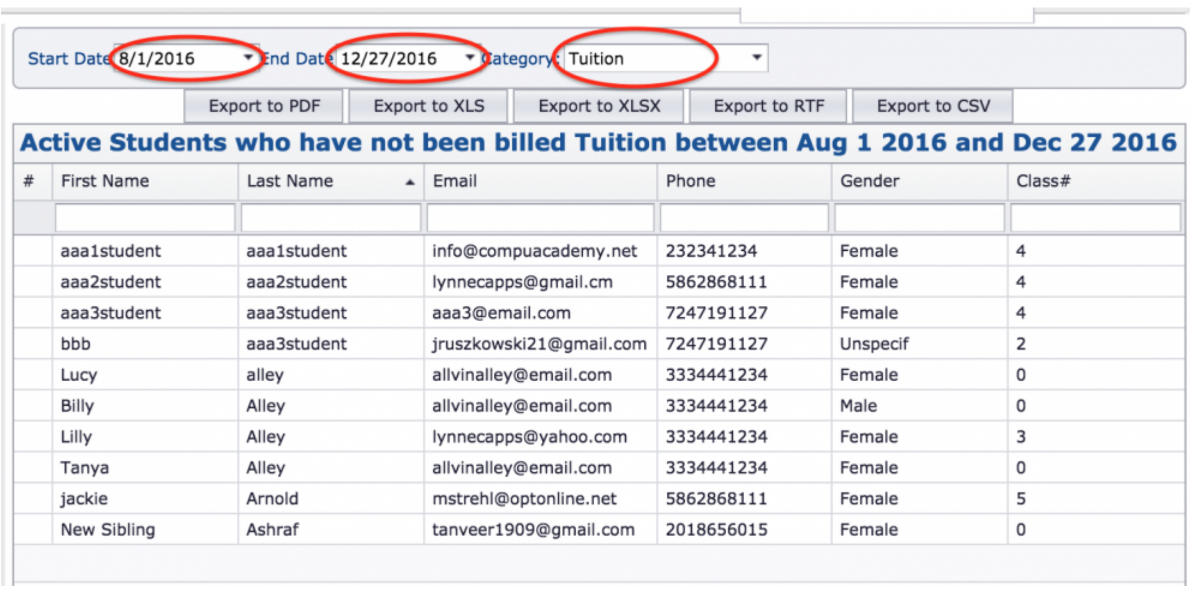
For example, if you want to show invoices with a balance that are due up to the end of the current year (A future due date). Enter the Invoices Paid From date and the Invoices Due Until Date as the Same Date. The last day of the current year: 12/31/2018

If you want to create statements that were due in the past and now late, (a past due date) Enter the Invoices Paid From date as tomorrow's date (because nothing has been paid as of tomorrow) and the Invoices Due Until as the Date that has past. This will show any invoice that was due up until the due date entered that still has a balance.

Who Has NOT been Billed Report

The 'Who has not been billed report' helps studios determine if they inadvertently omitted a student from being billed.

To run the report:
Enter Start and end dates – they define the timeframe you want to search.
Select the income category – this is the item expensed on the invoice



#	First Name	Last Name	Email	Phone	Gender	Class#
	aaa1student	aaa1student	info@compuacademy.net	232341234	Female	4
	aaa2student	aaa2student	lynnecapps@gmail.cm	5862868111	Female	4
	aaa3student	aaa3student	aaa3@email.com	7247191127	Female	4
	bbb	aaa3student	jruszkowski21@gmail.com	7247191127	Unspecif	2
	Lucy	alley	allvinalley@email.com	3334441234	Female	0
	Billy	Alley	allvinalley@email.com	3334441234	Male	0
	Lilly	Alley	lynnecapps@yahoo.com	3334441234	Female	3
	Tanya	Alley	allvinalley@email.com	3334441234	Female	0
	jackie	Arnold	mstrehl@optonline.net	5862868111	Female	5
	New Sibling	Ashraf	tanveer1909@gmail.com	2018656015	Female	0

You will get the results sorted by student name. The report can be exported to excel for printing.

If you wish to send out statements for those who have not paid their past due invoices, see statements.

Reports

Attendance Reports

These attendance reports will report the student attendance that has been taken in the system.

> ✻ If you are looking for a report to print to manually take attendance please use the Manual Attendance Report.

To see how to enter in attendance please click here.

There are 3 Attendance Reports to monitor your classes.

Master Classes Attendance Report

- This report will allow you to search specific student classes in a date range and give full details on any notes entered for the attendance records.

*You can filter for a specific, class, student, teacher, day of the week or venue and more!

Multiple Absence Report

- This report will allow you to see if there are students with a certain number of absences or more in a given time period. You will chose the date range and number of absences for a student to have missed for a specific class.You will be provided with student contact information so you can follow up on why the absences are occuring.

Perfect Attendance Report

- This report will allow you to see all students in a class for a specific time frame **who have not been marked absent** during that time. It will count the number of other attendance markings so you can judge if they have Perfect attendance or not.

Master Classes Attendance Report

This report will allow you to search specific student classes in a date range and give full details on any notes entered for the attendance records. You can filter for a specific, class, student, teacher, day of the week or venue and more!

To see any attendance issues in your studio you can run this report. A video below shows how to use this report.

Go to Report – Attendance Reports – Master Class Attendance Report
This report will bring back all attendance records for the Start and End Date time period you enter.

> If you only want to see specific date, enter in the filter boxes the search criteria you are interested in prior to clicking Find.

You can filter, sort and group the data in any way you wish. Column order can also be changed. This report is also exportable.

There is more data than what is initially visible, use the horizontal scroll bar on the bottom of the window or tab accross the filter boxes to see them.

The data retrieved include:

- Day Order (This column can be used to sort the classes by Day of the week they are scheduled Monday – Sunday. (Monday=1, Tuesday=2, …Saturday=6, Sunday=7)
- Day Name -The Days of the week the class is scheduled for.
- Time Range – The Start and end time the class is scheduled for.
- Class Name
- Teacher – Teacher the class is scheduled with.
- Student First Name
- Student Last Name
- Attendance – The Attendance Status marked for this class student
- Count – Number of times this status is marked for this class student
- Dates – The specific dates this attendance status was marked for this class student.
- Comments – Any comments that were noted on these dates. It will list the date and the comment. If the student has been marked as ending or ended enrollment a comment will be seen with the end date noted as such.

- Room – The room the class is scheduled to occur
- Family Name – So you can search for a specific families attendance.
- Status – The student’s status in the school (Active or Inactive)

Video creating the Master Class Attendance Report

Multiple Absence Report

Perfect Attendance Report

Missing Data Report

There are 4 Missing Data Reports

You can select the what fields you want to search for.
If data is missing for a specific student it will list that student in this report.

Missing Address
If the active student has no address entered, they will be listed with their phone number and email address.
The Student Address is located Student-> Address tab

Measurements
If the active student has no measurements entered, they will be listed with their phone number and email address.
Student Measurements can be entered by the class or by the student.

Parent
If the active student has no guardian entered, they will be listed with their phone number and email address.
To add a guardian for the student, go to Student-> Guardian Information tab

Group
If you have school Groups set up, this report will show any active students not established in a group.
If you do not have Groups set up- this report will not work.
Go to Admin-> Address ->School Group tab to create.

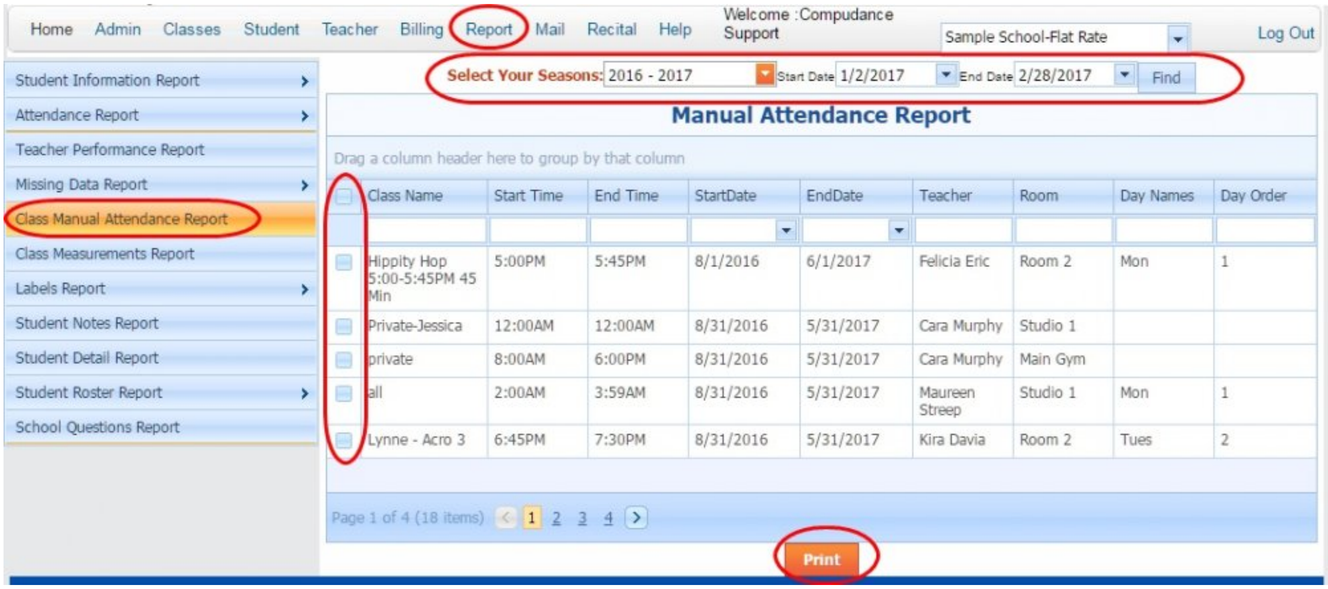
Class Manual Attendance Report

The Class Manual Attendance Report is used to print out a roster for a class to mark attendance on. This information can then be put into CompuDance at a later time if you chose.

Go to Report-Class Manual Attendance Report

1. Select the Season of the class you wish to retrieve.
   Then enter the date range of the classes to be dated in the column headers.
2. You will have 10 dates allowed for each class.
   If your range does not include 10 dates for a class, the remaining spots will be left blank or allow write in dates.
   If your date range allows more than 10 dates for a class, the printout will only include the first 10 dates.
3. Click Find – You can filter for a specific class, teacher, room or day of the week.
4. Select the classes you wish to create Rosters for. You can select them individually or use the select all box on the top left corner of the column header.

5. Click Print



You will be presented with a webpage of the classes selected.
Scroll down and make sure your information looks correct.
Scroll to the bottom of the Page and click the green Print Roster button

Attendance Roster

Class: Hip Hop **Days:** Thu **Time:** 4:00PM – 5:00PM

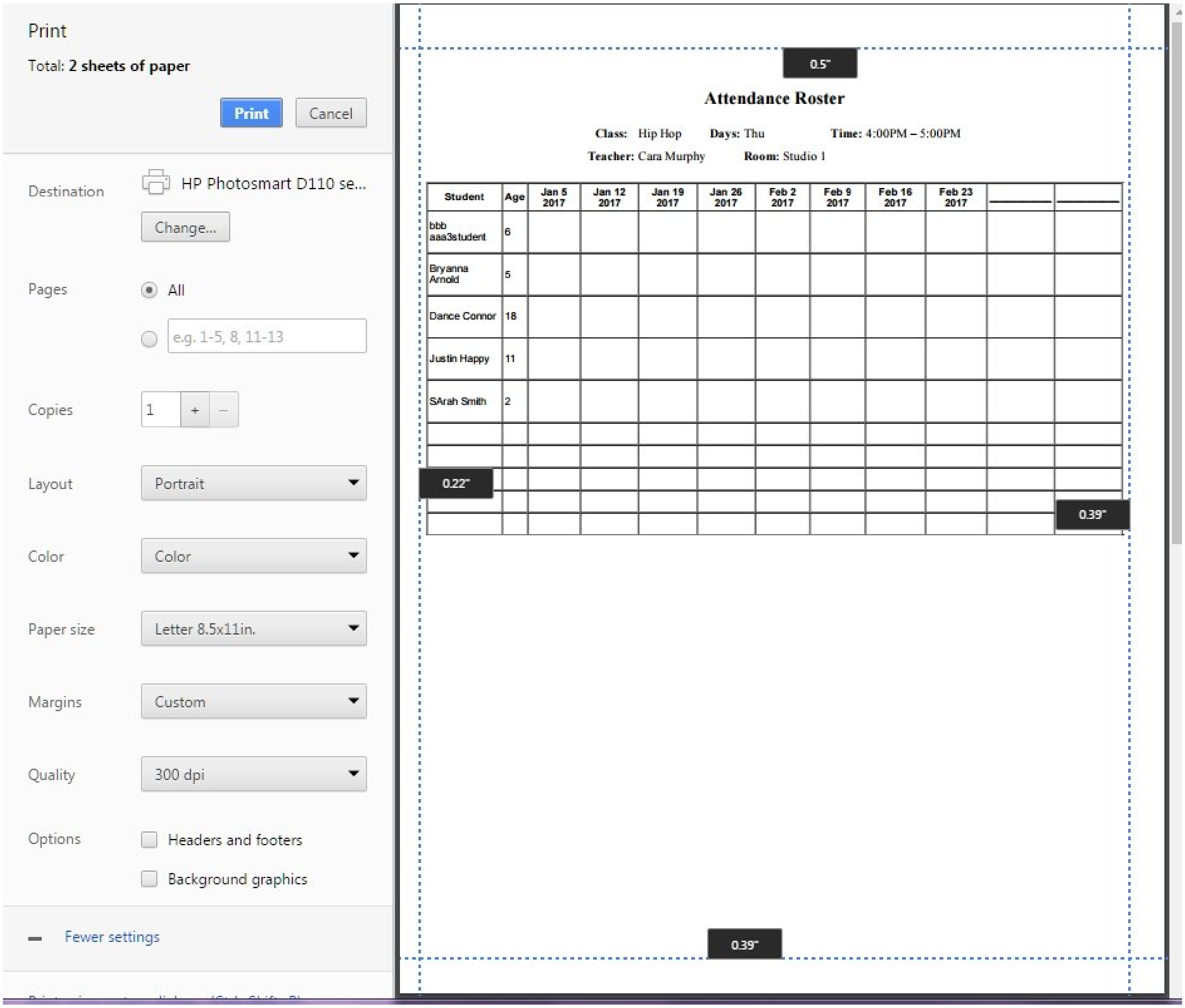
Teacher: Cara Murphy **Room:** Studio 1

Student	Age	Jan 5 2017	Jan 12 2017	Jan 19 2017	Jan 26 2017	Feb 2 2017	Feb 9 2017	Feb 16 2017	Feb 23 2017	__________	__________
bbb aaa3student	6										
Bryanna Arnold	5										
Dance Connor	18										
Justin Happy	11										
SArah Smith	2										

Print Roster

You will then see the Google Chrome Print Preview window appear. It will page break per class.
You can use the preview options to change the page layout, Margins and other options. To see more

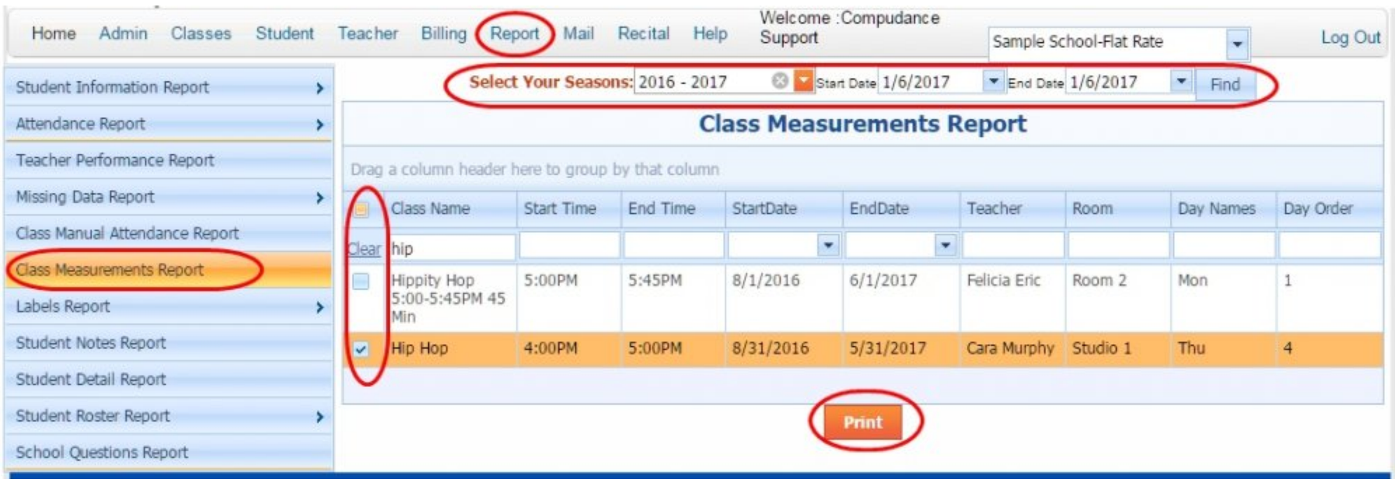
options click More settings.



Class Measurements Report

The Class Measurements Report will allow you to run a report to write in measurement or can be used after the measurements have been entered in the system and print them for your records or ordering process. This report prints with one class per page.

Go to Report-Class Measurements Report
Select the Season the class is in. The dates can be entered as today's date for both. Click Find.
You can filter to find the specific classes.
Select the classes you want to create a report for.
Click Print



Once you approve the data in the 2nd screen, click the green Print Roster button.

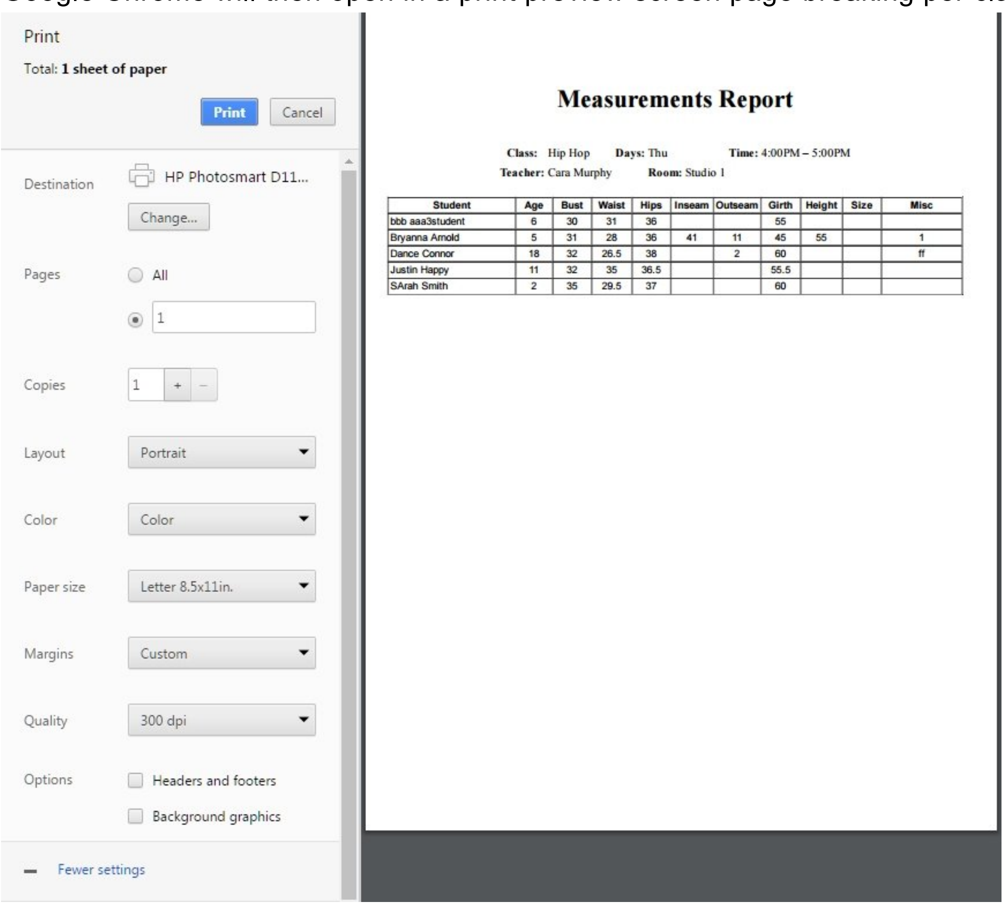
Measurements Report

Class: Hip Hop **Days:** Thu **Time:** 4:00PM – 5:00PM
Teacher: Cara Murphy **Room:** Studio 1

Student	Age	Bust	Waist	Hips	Inseam	Outseam	Girth	Height	Size	Misc
bbb aaa3student	6	30	31	36			55			
Bryanna Arnold	5	31	28	36	41	11	45	55		1
Dance Connor	18	32	26.5	38		2	60			ff
Justin Happy	11	32	35	36.5			55.5			
SArah Smith	2	35	29.5	37			60			

Print Roster

Google Chrome will then open in a print preview screen page breaking per class.

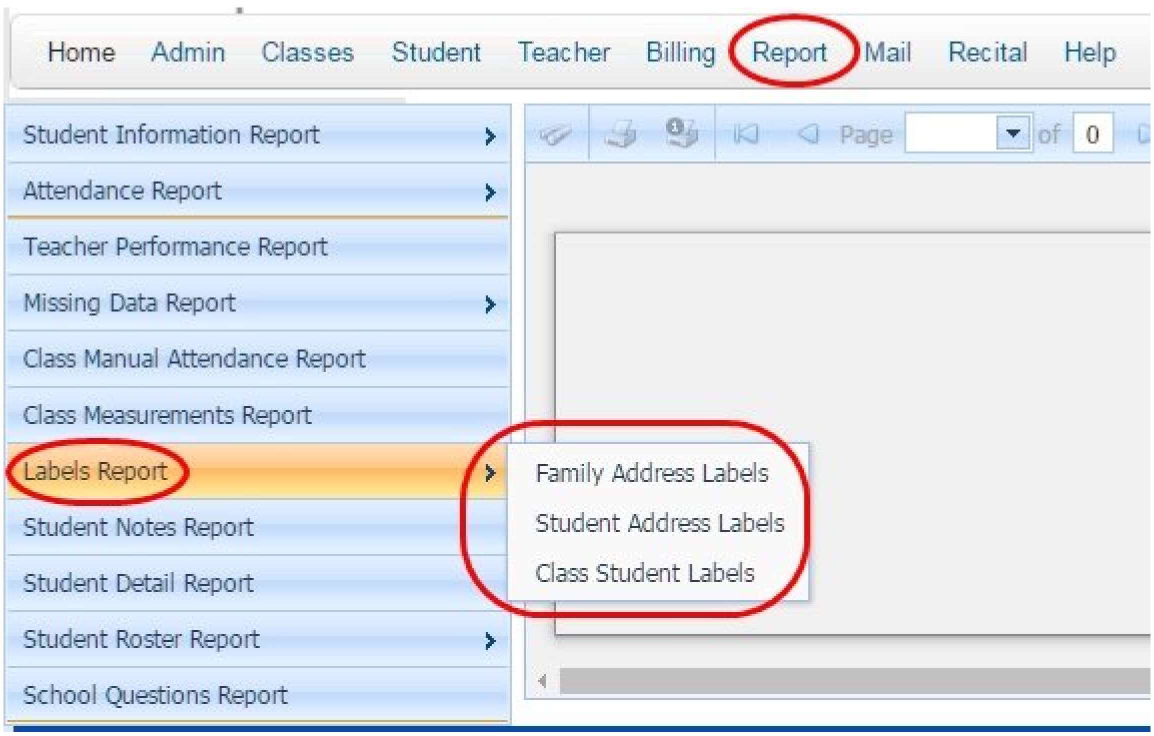


You may change print settings including the margins when you click More settings.
Then click Print.

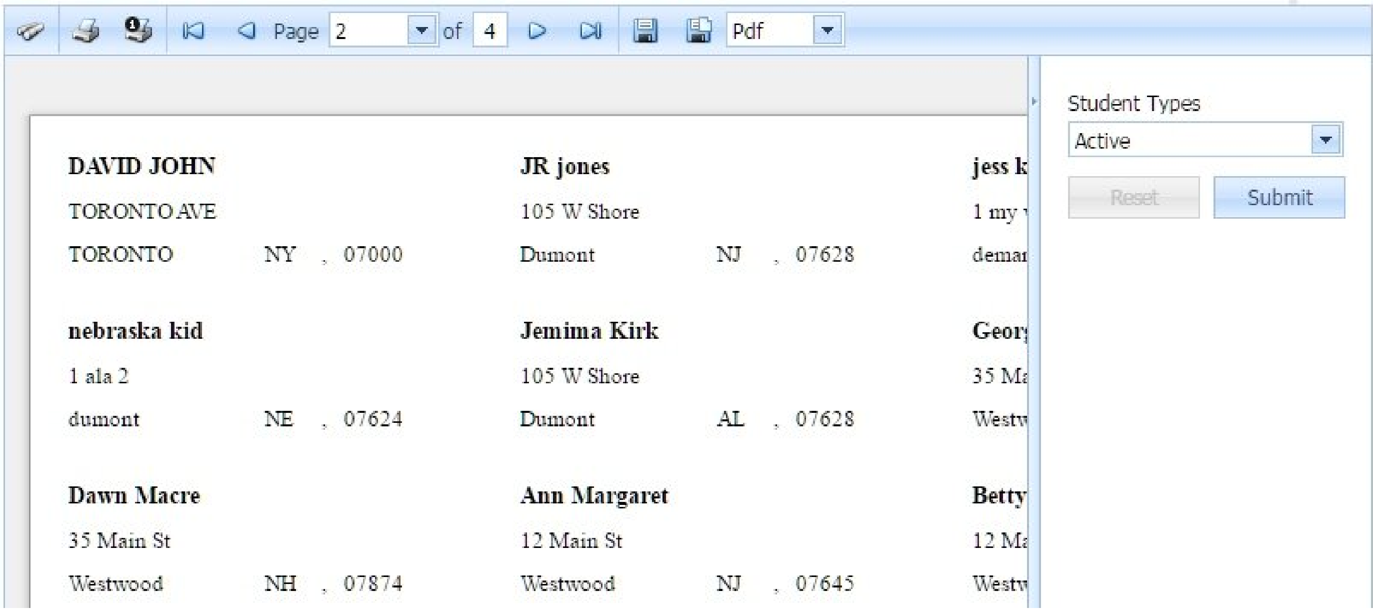
Labels Report

The Labels Report has three options to create mailing labels.
All labels are formatted be print on the Avery 5160 1” × 2-5/8” Address labels that are 3 columns of 10 per sheet.

Family Address Labels	Student Address Labels	Class Student Labels



The Family Address Labels will create a label for each entry in the Family Link page.



The Student Address Labels allow the user to select the type of Student Status you wish to create (Active, Prospect or Inactive)

These labels will be addressed to the student with the student address.

The Class Labels will select all active classes with enrollment for the default season.

It will list the class name, start-end time and day of class, and student name.

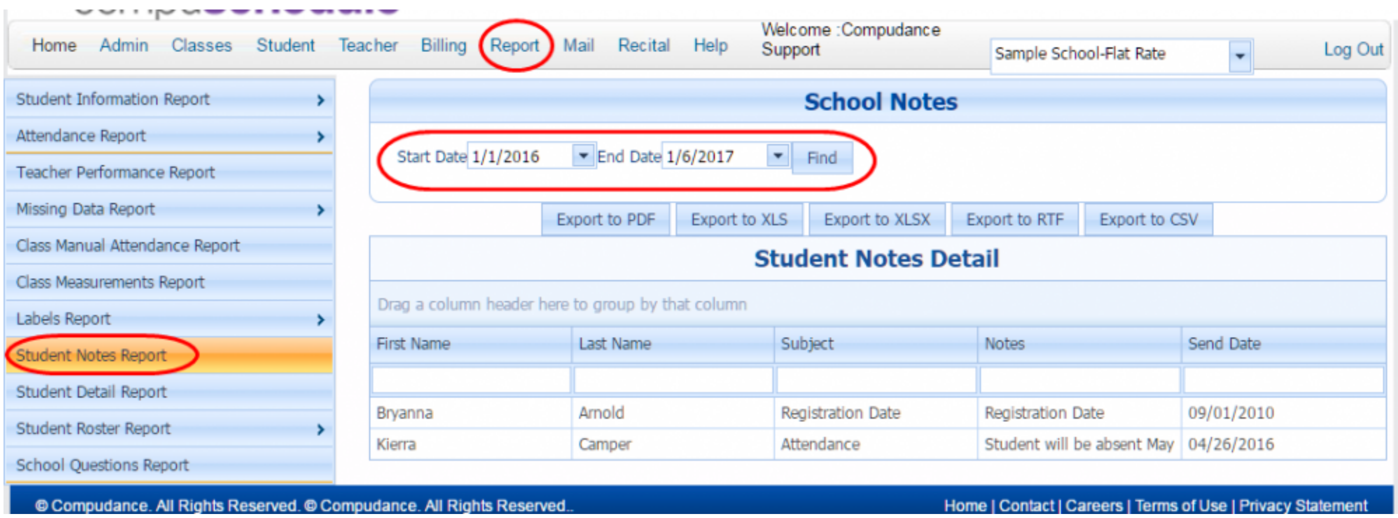
Lynne - Acro 3 6:45PM-7:45PM Tues Leah Cooke	Lynne - Acro 3 6:45PM-7:30PM Tues apernell eprnell	Lynne - Acro 3 6:45PM-7:45PM Tues apernell eprnell
Lynne - Acro 3 6:45PM-7:30PM Tues Smile Happy	Lynne - Acro 3 6:45PM-7:45PM Tues Smile Happy	Lynne - Acro 3 6:45PM-7:30PM Tues marnie horvat
Lynne - Acro 3 6:45PM-7:45PM Tues marnie horvat	Lynne - Acro 3 6:45PM-7:30PM Tues ARNOLD JOHN	Lynne - Acro 3 6:45PM-7:30PM Tues LEE JOHN

Student Notes Report

The Student Notes Report will allow staff and admin users to retrieve Student Notes entered in a specified date range.
This allows the studio to leave notes on a student and act on the note at a later date.
Some studios will keep notes on auditions, financial reasons, or tract specific information for each student that the system does not have a designated field for.
This report can be exported, filtered, sorted and grouped by the admin or staff user.

The Notes are entered in the Student detail Tab-Note.

To run the report go to **Report-Student Notes Report**
Enter the date range of Notes you wish to see. Then you can filter for a specific Subject if you wish.



Student Detail Report

The student Detail Report will give you all contact information for your active students, their parents and the classes they are currently enrolled.
This is a large report that you can scroll or tab across the filter boxes to see the rest of the columns.
This report can be exported, filtered and sorted to find exactly what you are looking for.
This report also has a special search bar that will find all records across all of the fields. You can enter a phrase, class, phone number and you would be able to find it in any field.

*The following are the fields represented

On Main Student Record:	**Student Address**	**Student Guardian Information – Type Mother**	**Class Enrollment Information**
• Student First Name • Student Last Name • Student Email • Student Main Phone Number (cell) • Student Date of Birth • Tuition	• Student Address Line 1 • Student Address Line 2 • Student City • Student State Name • Student Zip Postal Code	• Mother Name • Mother Email • Mother Phone **Student Guardian Information – Type Father** • Father Name • Father Email • Father Phone	• Registration Date • Classes Enrolled

Student Roster Reports

The Student Roster Report will list each student actively enrolled in a class/season. You will find the reports under **Report Menu.**

There are three options to the Student Roster Report

- **Student Roster by Student** – Data is grouped by Student. This means, you will see each student's classes. If you have an email Student Schedule Customization, it is found here.

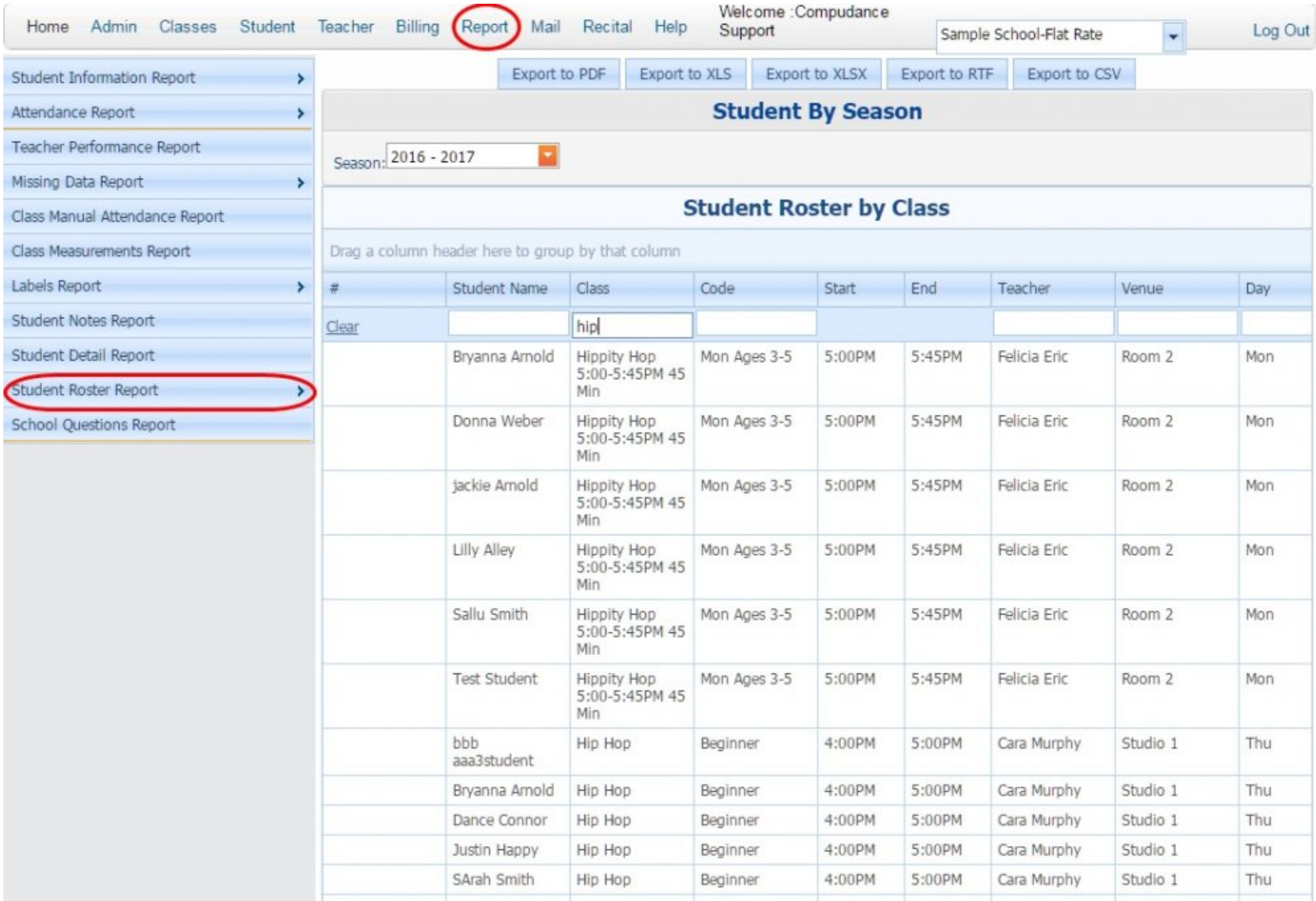
- **Student Roster by Class** – The data is sorted by class name.

- **Student Roster by Group** – This will list all active students by the group they are in.

Printing and Organizing the data to your needs:
All three of these reports can be exported, filtered, sorted and grouped by the admin or staff user.

The information included on each report is:

- Name of Class or Group
- Class information (if by Student or Class): Code, Start and End Time, Teacher scheduled, Venue scheduled, Day
- Student Information: First Name, Last Name, Date of Birth, Age, Student main Email, Student main phone, Full Student Name



If you use the bottom horizontal scroll bar or click Tab across the filter boxes, you will see more data rows

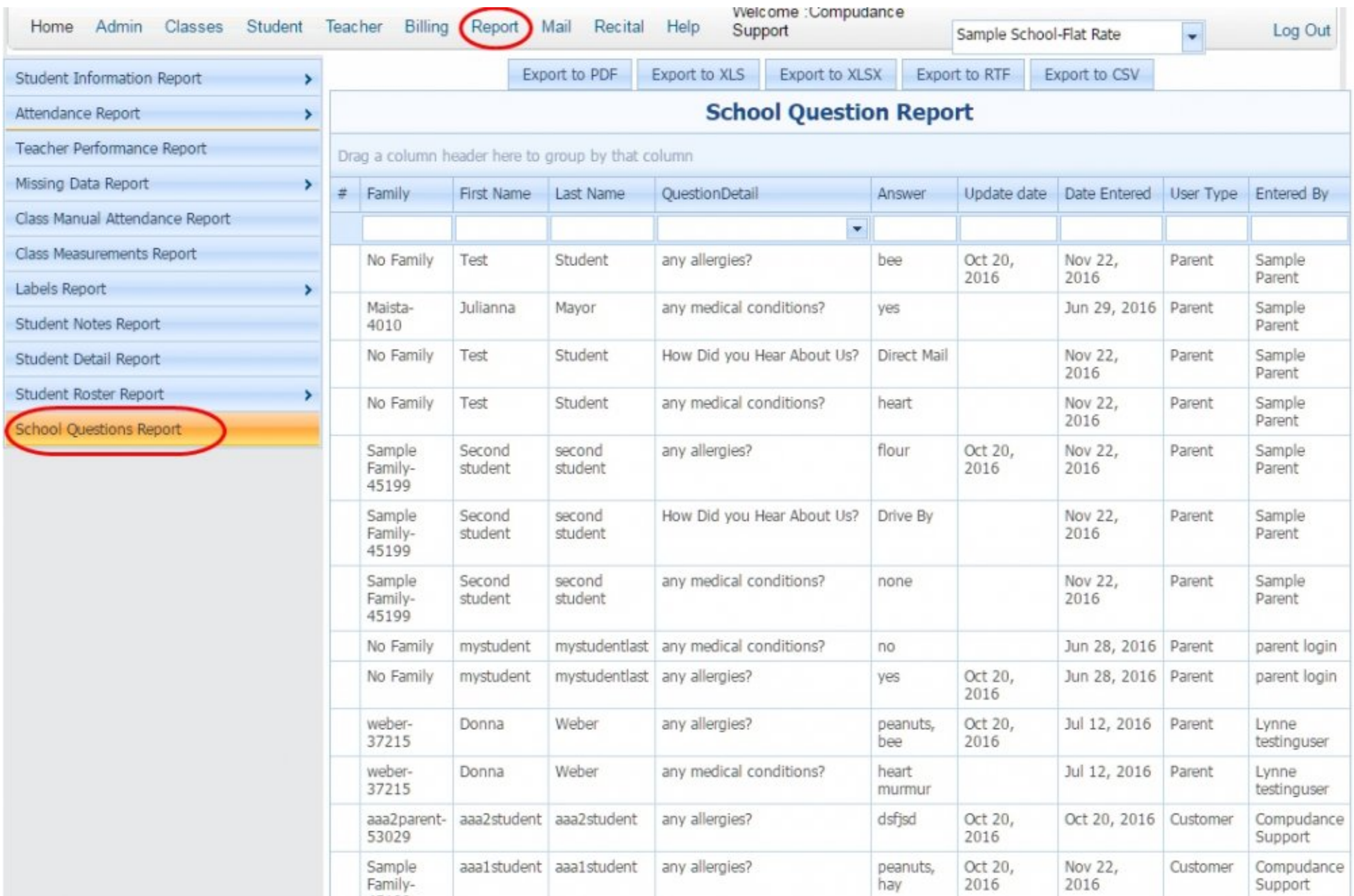
Day	First	Last	DOB	Age	Email	Phone
Mon	Bryanna	Arnold	2/8/201	5	mstrehl@optonlin	5512656451
Mon	Donna	Weber	2/2/201	6	lynnecapps@gma	2018512184
Mon	jackie	Arnold	1/1/201	7	mstrehl@optonlin	5862868111
Mon	Lilly	Alley	2/1/201	6	lynnecapps@yahc	3334441234
Mon	Sallu	Smith	1/23/19	56	flipsidedance23@	5088815109
Mon	Test	Student	1/1/200	17	Parent@sample.c	000
Thu	bbb	aaa3student	2/2/201	6	jruszkowski21@gı	7247191127
Thu	Bryanna	Arnold	2/8/201	5	mstrehl@optonlin	5512656451
Thu	Dance	Connor	6/21/19	18	renebranstetter@	775-230-3352
Thu	Justin	Happy	2/1/200	11	smile@hotmail.co	551201346768
Thu	SArah	Smith	2/1/201	2	jr@compudance.c	2120002121
Thu	Peyton	Camper	7/9/200	10	camperk@gmail.c	609-555-9444
Thu	Alexandria	Daniel	2/21/20	10	ddaniel@gmail.cc	856-555-8252
Thu	jackie	Arnold	1/1/201	7	mstrehl@optonlin	5862868111
Thu	Kierra	Camper	12/17/2	8	camperk@gmail.c	609-555-9444
Thu	ronald	connor	2/2/201	6	renebranstetter@	2012221234

School Question Report

This Report will show all answers for Active Students to any School Questions including the How Did You Hear About Us?

Go to Report – > School Questions Report

You can filter, edit, sort and group this report.



Mail – Email & Texting

The mail section of the database is for all communications.

The * Inbox and Send * sections on the left side submenu are for the internal messaging system. These areas allow other users to send the admin user messages which can be replied to. In order for the users to access these messages, they must login to CompuDance. They are not sent to their personal email addresses outside of the system.

- Express Message allows the school admin and staff users to send email messages to all other parties with a proper email address in the system.
- Express Send Mailbox allows the user to see all messages sent by that school that were transmitted successfully.
- SMS Text Messaging – Allow the Admin and Staff users to send text messages to all parent and teacher login users who have provided their cell phone number and mobile provider. This feature is only for studios that offer parent portal membership.

Express Message

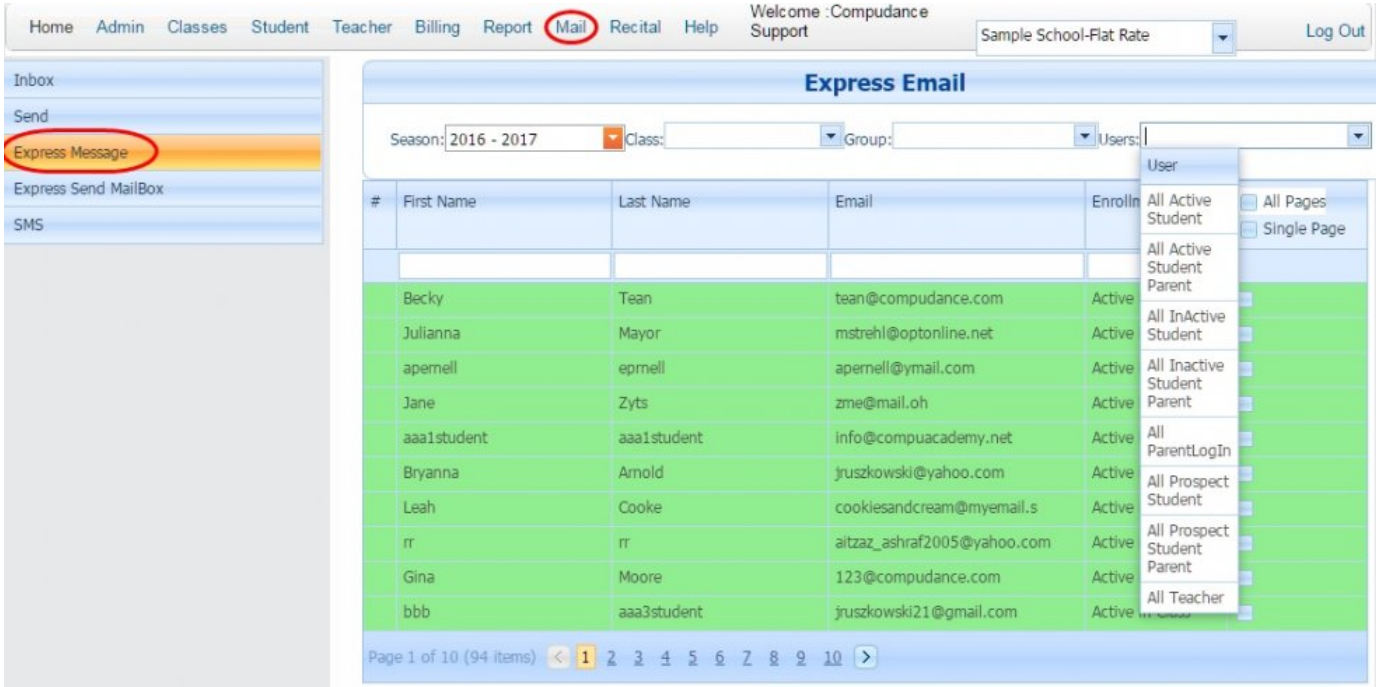
Mail->Express Message is used to Email a single person or group of people an email to their specific email addresses stored in our system.
These messages are sent using the studio email address provided to CompuDance. If you want to change this email address, you must send us a written request to do so.
A copy of the message will also be sent to the User email address who created the message. This will allow the actual sender from seeing the message sent and let the studio know which user sent which message.
The studio email address will get all replies and delivery notification failures so you can correct email addresses as needed.

✻ When a student is marked as inactive, you still have the ability to contact them in emails or text messages. You can turn email and text communications. See Unsubscribe Email/Text

Jump to: **Creating the Email Message**

Selecting Who is to receive the Email

When you go to Express Message you will see the top half of the window like this. You have the ability to filter for a specific recipient or group.
In the picture, you will see a drop down option from the User filter. This allows you to select the type of people to receive the emails.



You may also filter by the other options. The default season is selected. You may change it to another season if you wish.
You can select an individual class. If you only want students Active in that particular class, you may use the Enrollment Status filter for it.
If you want to email only those who have ended enrollment, you may filter Enrollment Status for InActive in Class.
You may filter for a specific person.

Of the **User Filter** Types, you may select:
None (leave the box blank)- This is the list of All Students that have been enrolled in the season selected. They can include Active and Inactive Students. It will list the Student main email address and any email addresses in the Student Email tab.

All Active Student – This is only students with a status of Active that have been enrolled in the season selected. This email list does not include the guardian email addresses unless they are listed in the student's email tab. They do not have to be currently active in a class. In order to get only the actively participating in a class include the subfilter of Active in Enrollment Status.

All Active Student Parent – This will list all guardian emails and guardian email tabs for students with an Active status. It does not include the Student Emails unless they are the same as the guardian's.

All Inactive Student – This will allow you to email students that are currently marked as "Inactive". You can use this to email students enrolled in a previous season who have not enrolled in the current season yet.

Make sure you change the season to the previous season. This email list does not include the guardian email addresses unless they are listed in the student's email tab.

All Inactive Student Parent – This will list all guardian emails and guardian email tabs for students with an Inactive status. It does not include the Student Emails unless they are the same as the guardian's. You can use this to email guardians of students enrolled in a previous season who have not enrolled in the current season yet. Make sure you change the season to the previous season.

All Parent Login – This will allow you to email all parents who have a login with Active status created in the Admin-User tab. It is typically created when the family is created using the Add New Student form.

All Prospect Student – This will allow you to email students that are currently marked as "Prospect". This email list does not include the guardian email addresses unless they are listed in the student's email tab.

All Prospect Student Parent – This will list all guardian emails and guardian email tabs for students with a Prospect status. It does not include the Student Emails unless they are the same as the guardian's.

All Teacher – This will list all Teacher from the Teacher section with a status of Active.

Students DOB today – This will allow you to see all students with a birthday today.

Creating the Email Message

The Subject line is required. Since the email is sent from the Studio email address, you can use the subject to connect with the recipient about the email contents.

When you are composing your email message, you may want to write it in a word processor program or other content creator. You can copy and paste it into the email Design box in either regular format or as HTML in the HTML tab on the bottom left side. You can then switch the view to Preview.

If an email is sent successfully, you will see it in the Express Send Mailbox

Email Creation

RCDC OF THE PERFORMING ARTS OCTOBER 3, 2017

RCDC NEWSLETTER

RCDC 4TH SEASON FALL NEWSLETTER

Here is a brief newsletter to keep everyone updated! We are off to a great fourth season thus far and cannot thank you all enough for your love and support. Please direct all questions to cotlerdancecenter@gmail.com or call us at 561-531-0600!

Date Night Dance Party

Let RCDC help you with an evening out without the kids.

November 11th 5-8 pm. $25/ child. Reserve your child's spot today!

Off to a late start?

There are a few open classes still available.

Costume Payment

Due 11/15

$75/class

1

COFFEE/TEA

FUNDRAISER FOR COSTUMES.

OCTOBER 10/5-10/21

2

RCDC MERCH SALE

ORDER FORMS WILL BE AVAILABLE.

DUE BY END OF OCT

3

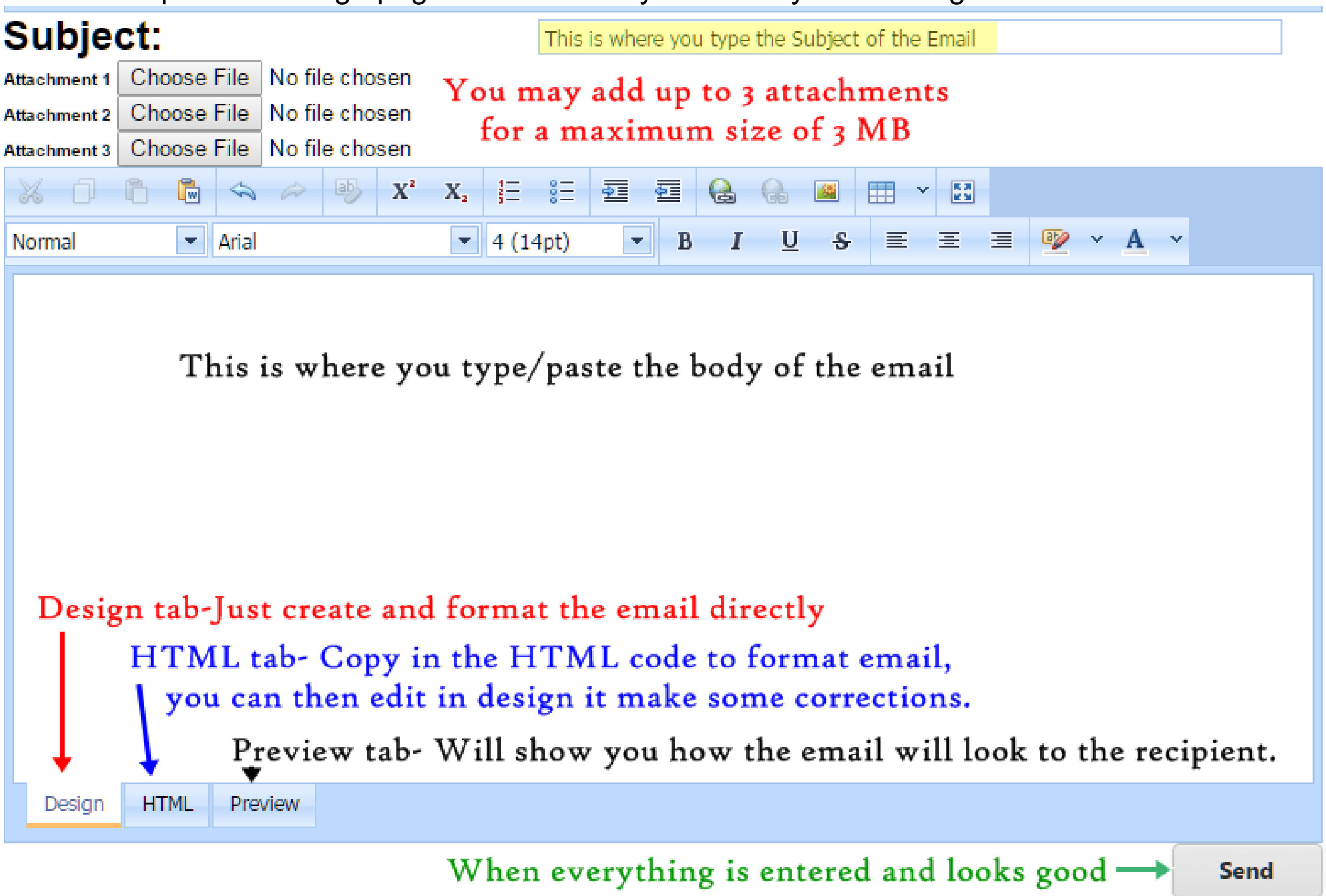
DRESS UP WEEK

COME TO DANCE IN A COSTUME!

OCT. 24-30

BLACK FRIDAY DAY CAMP
6AM-1PM
$50.00
Resevation Required

The top part of the Express Message will be where you select your email recipients. The second half of the Express Message page will be where you create your message.



The **Subject Field is required** and located directly below the recipient selection box.

In the large box at the bottom of the screen you have 3 tabs (select the one you wish to use on the bottom left.).

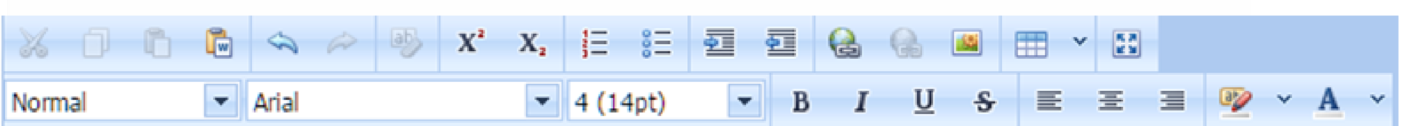
Design is the tab you will use to write or paste in your email directly.

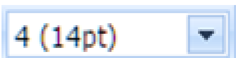
HTML is the tab to use when pasting in HTML code to format your email. If you have a flyer creator program, I recommend copying in the HTML code to get the same look.

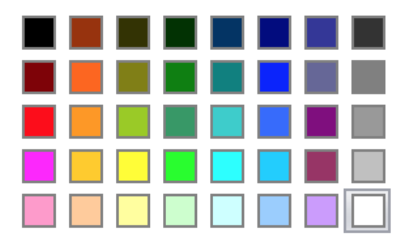
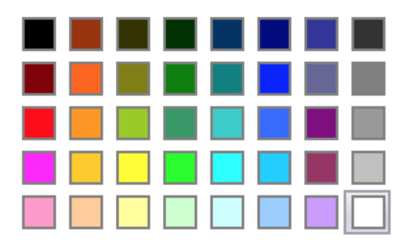
You may copy in the html and then go to design tab to make changes.

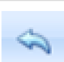
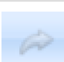
Preview is the tab to see how the email will look.

In the Design tab you have several formatting tools to use.



Format Option	What it does	Options
	Sets or changes (highlight 1st) the text type (Most will use Heading 2 – 4 and Normal)	Normal, Heading sizes 1 – 6, Address, Normal (DIV)
	Select the type of font prior to entering or highlight to change.	Times New Roman, Tahoma, Verdana, Arial, MS Sans Serif, Courier, Segoe UI (Other fonts can be pasted from Word or used with HMTL paste.)
	Select the size of font prior to entering or highlight to change. Maybe changed if Format type option is used.	Size 1 (8 pt), 2 (10 pt), 3 (12 pt), 4 (14 pt), 5 (18 pt), 6 (24 pt), 7 (36 pt) (Other sizes can be pasted from Word or used with HMTL paste.)
	Select prior to entering for a Bold effect or highlight text to change. Can be also used to remove the Bold effect.	**Bold** or Unbold
	Select prior to entering for an italic effect or highlight text to change. Can be also used to remove the italic effect.	*Italic* or no Italic
	Select prior to entering for an underline effect or highlight text to change. Can be also used to remove the underline.	Underline or no underline
	Select prior to entering for a strikethrough effect or highlight text to change. Can be also used to remove the strikethrough line.	~~Strikethrough~~ or no strikethrough
	This option can be selected prior to typing or highlight to change. It will left align the text on the page or in a table cell.	Left align of text
	This option can be selected prior to typing or highlight to change. It will center align the text on the page or in a table cell.	Center alignment of text
	This option can be selected prior to typing or highlight to change. It will right side align the text on the page or in a table cell.	Right side alignment of text

	Sets the background color to the text (can be used as a highlighter)	
	Set the color of the Text	

Tool	Name	How to use	Shortcut Keys
	Cut	Highlight the text you want to cut out of the message. Removes the current text.	Ctrl x, cmd x
	Copy	Highlight the text you want to copy from the message. Leaves the current text.	Ctrl c, cmd c
	Paste	click your pointer where you want the cut or copied text the go. Then click this button.	Ctrl v, cmd v
	Paste from Word	Click in the design box, then click this button. A pop-up will appear. Use paste shortcut key to paste information cut or copied from a word document. Then click OK (you may chose to remove the font style word used)	Ctrl v, cmd v
	Undo	To reverse the last edit made	Ctrl z, cmd z
	Redo	To reverse the undo	Ctrl y, cmd y
	Remove Format	Highlight the text you want then click the button. The format will go to plain text	No shortcut
	Superscript	Highlight the text you want then click this button to make the text half size and align to the top of other text on that line. To reverse use remove format	No shortcut
	Subscript	Highlight the text you want then click this button to make the text half size and align to the bottom of other text on that line. To reverse use remove format	No shortcut

	Order List	You can click the button and then type the text. Each line return will be a new line in 1-2-3 order. If the text is already there, you can highlight it and then click the button. Each return will become a numbered line.	No shortcut
	Bullet List	You can click the button and then type the text. Each line return will be a new bullet item. If the text is already there, you can highlight it and then click the button. Each return will become a bullet point.	No shortcut
	Indent	You can click the button and the cursor will indent and stay indented until you turn it off. If the text already exists, you can highlight it and then click the button to move that text inward.	No shortcut
	Outdent	You can click the button and the cursor will move the indent outward. If the text already exists, you can highlight it and then click the button to move that text outward.	No shortcut
	Insert Link	Click button. You will be prompted for the URL (web address with http) or you can have the link create a message to an email address. Keep in mind if the user has an internet email and not an email application, the email will not work for them. Enter the text you want the link anchored with or you could have highlighted it first.	No shortcut
	Remove Link	Highlight the text that has a link already. Click the button to remove the link but keep the text.	No shortcut
	Insert Picture	Place your cursor where the image should display. Select From the Web tab. copy in the image url from a website. To get the image url, go to the webpage the image is displayed. Right click on it and select copy image address or copy image url. Then you can paste it in the top line. hit enter. the image should display below. Click OK. (You can not upload images from your computer at this time.) We have some images you can use online. See Some images you can use for communications	No shortcut
	Insert Table and Options	Click where you want a table to go. You will get a popup box. Select how you want the table displayed. You can edit afterwards. To use the table options, click in the table or distinct part of the table and click the down arrow. You can then change the properties for a part or the whole table.	No shortcut
	Full Screen Toggle	Click this button to make the email body window full screen or back to normal	F11, cmd+fn+F11

Email Active Participating Students

In Express Message, the initial student list will show All Students that have been enrolled in the default season.

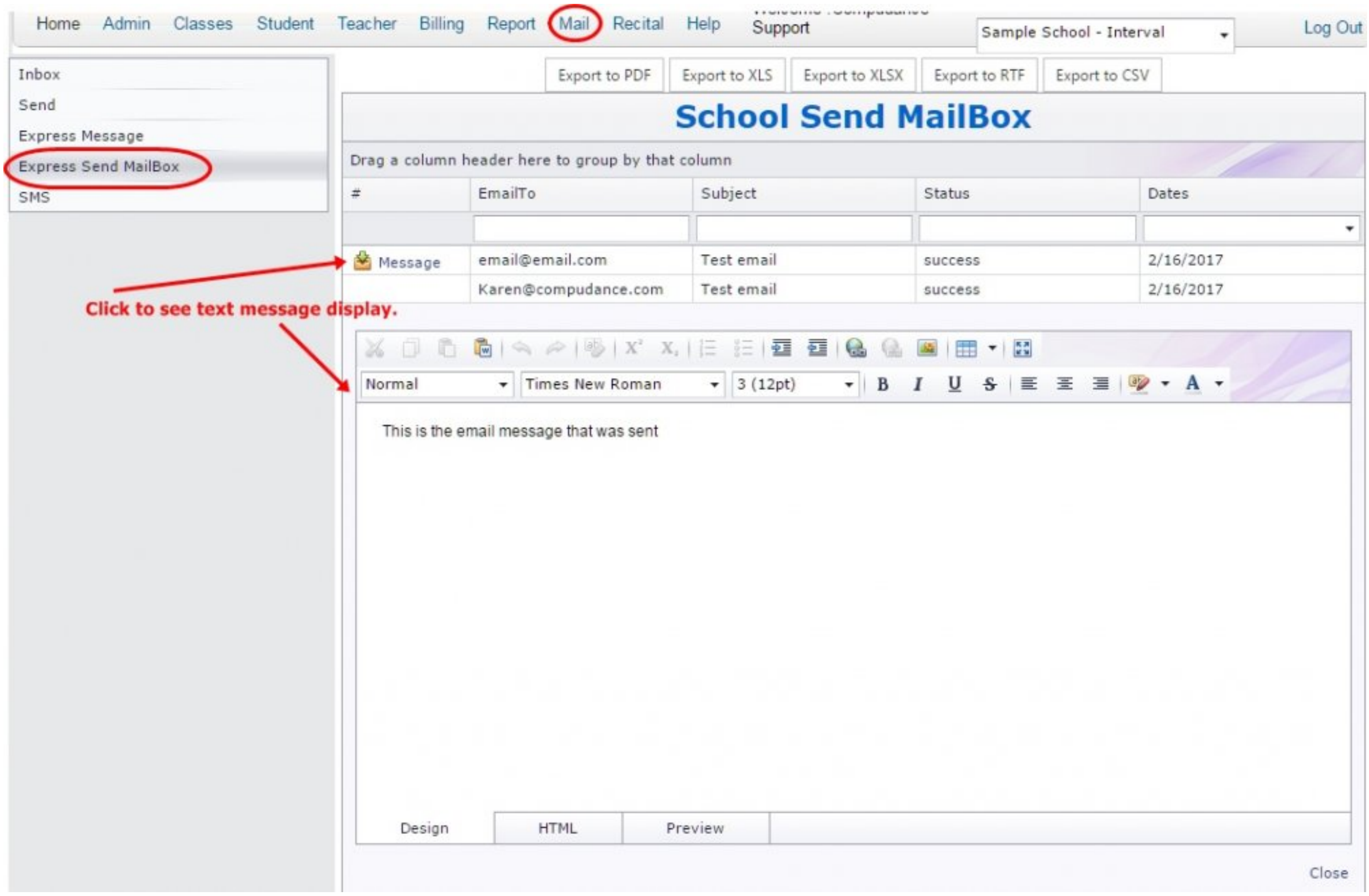
To send to only students currently enrolled in a class, you must filter the list using Student Enrollment column for **Active in Class**.

This list will include all of the email addresses for the Student. The main student email plus anything in the Student Email tab. If you have a parent email you wish to include in this list, add it to the Student Email tab too.

After you find the addresses you wish to email to, you must select them by checkbox.

Express Send Mailbox

To see a list of all emails sent by the studio using the express message feature for the last two months..
Go to Mail – Express Send Mailbox.
You can filter for a specific message using Subject or Date sent.
It now shows each recipient email address individually.



If you see the message in the list it is being sent or already has been sent from our server successfully.
You are able to Search using the filter boxes for a specific email address recipient, subject line and date sent.
You may sort, group or export the report list.

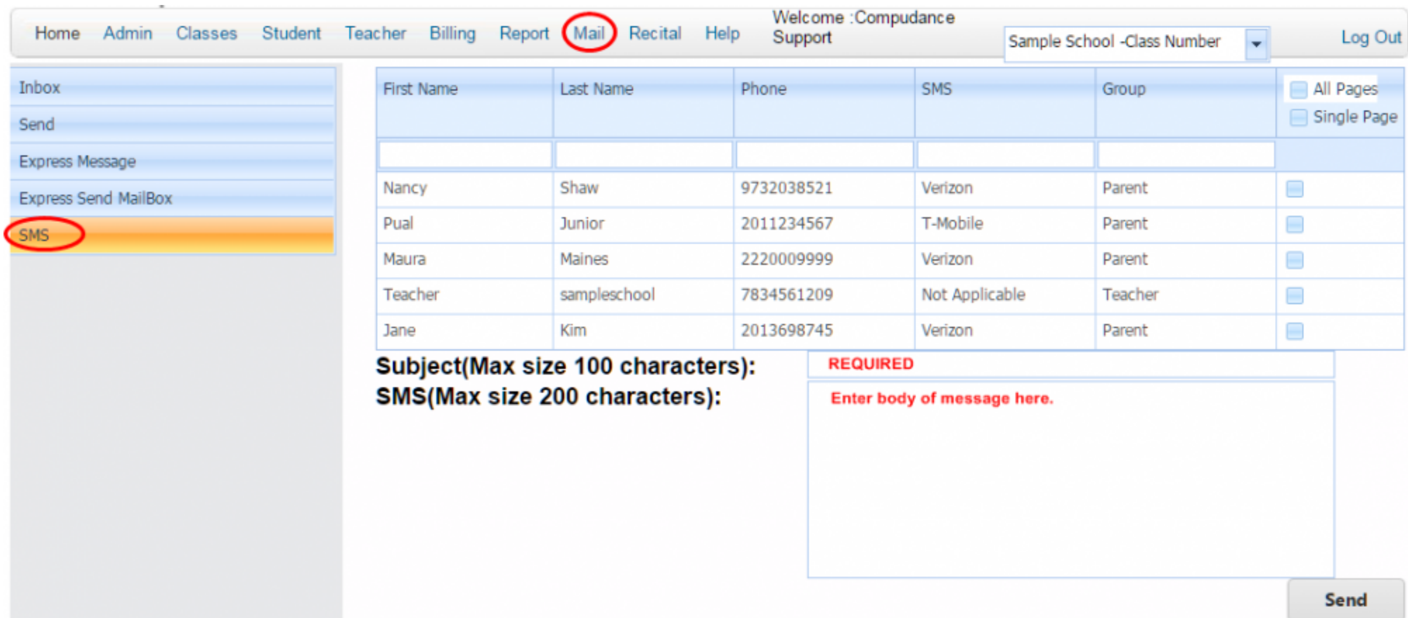
If there is a delivery issue, your studio email address should receive a **Delivery Notification Failure** email in the studio email address inbox.

The failures could be for many reasons that are out of CompuDance’s control.

- The recipient’s email address is wrong or does not exist.
- The recipient’s email box may be full or not accepting messages.
- The recipient may block emails from third party servers.

SMS Text Messaging

If the studio would like to send Text messages to Parent or Teacher User accounts that accept text messaging, you would go to **Mail-SMS**



You will see a list of all Admin-User:Parent and Teacher accounts if they allow text messaging.
It will only display User accounts with the status of Active.
You can see their cell phone number and mobile provider.

Select the recipients to get your text message. You must populate the subject line and message box. There are limitations to the number of characters for each section. You can not format the text, only plain text can be sent.

Once you hit Send, the subject line will change to “Email Send” to say the message was sent.

These text messages will be sent from the studio email address.
Any replies or message failures will be sent to the studio email address.

Text message failures may result because:

The provider is Not Applicable
If the wrong provider is noted, most of the time the message will not be delivered. (Some services share texting so there is a possibility it will still work.)

The recipient is blocking the message
REcipient phone number is marked as Unsubscribe in CompuDance

Email addresses in the system

Every person entered in the system has their own email address and maybe even tabs to add more than 1 email.
Here is a list of the email address locations and how they are used.

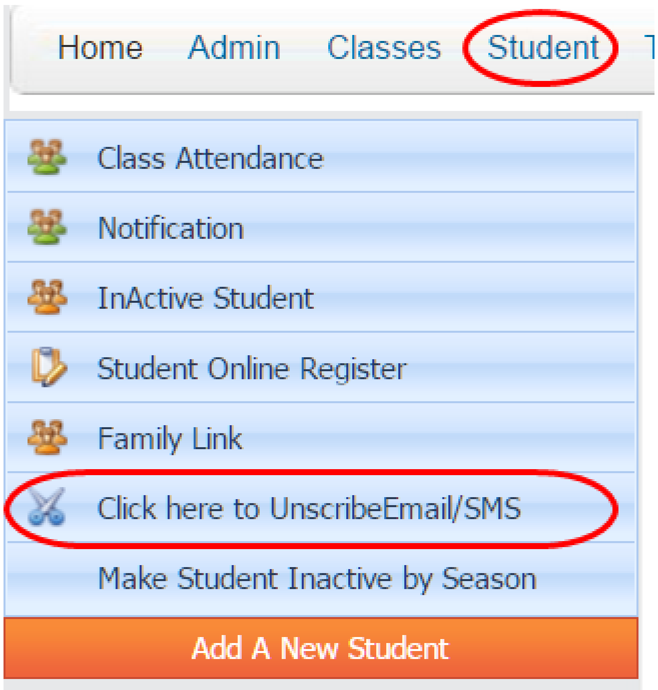
Type	Location	How used
Parent Login	Admin-User tab	Parent uses the email as a login to the system-Must be distinct from other user emails, Studio can email this group in Express Mail User:Parent Login
Teacher Login	Admin-User tab	Teachers use this email to login to the system-Must be distinct from other user emails
Student Email	Student:Edit	Express Mail-Default email list, Depending on Student Status (All Active Student, All Inactive Student, All Prospect Student), If no Default Bill to Guardian-Student Statement
Student Email tabs	Student- -Email tab	Express Mail-Default email list, Depending on Student Status (All Active Student, All Inactive Student, All Prospect Student)
Guardian Email	Student- – Guardian Information tab:Edit	Express Mail: Depending on Student Status (All Active Student Parent, All Inactive Student Parent, All Prospect Student Parent)
Guardian Email tabs	Student- – Guardian Information tab – Email tab	Express Mail: Depending on Student Status (All Active Student Parent, All Inactive Student Parent, All Prospect Student Parent)
Guardian Default Bill to Email	Student- - Guardian Information tab:Edit	Email Invoice, Student Statement
Family Email	Student-Family Link:Edit	Family Statement
Teacher Email	Teacher:Edit	Express Message User:All Teacher (Only Active Teachers)
Teacher Email tab	Teacher Email tab	Express Message User:All Teacher (Only Active Teachers)

Unsubscribe specific Email or Text

If you have a specific person who does not want to receive text messages or emails to a specific address

The studio can Unsubscribe the email or cell phone from receiving these messages.

Go to Student -> Click Here to Unsubscribe Email/SMS



You will see a list of all people in your database. You can filter by name, email address or phone number.

School Alert To UnSubscribe

#	First Name	Last Name	Email	Cell Phone	UnSubscribeEmail	UnSubscribeSMS	Comments
Clear	a						
Edit	aaa1student	aaa1student	info@compuacademy.net	232341234	✓	✓	Request byparent
Edit	aaa2student	aaa2student	lynnecapps@Ygmail.cm	5862868111	☐	☐	
Edit	aaa3student	aaa3student	aaa3@email.com	7247191127	☐	☐	
Edit	Ava	Abbate	ladybug419@gmail.com	856-630-9338	☐	☐	
Edit	Alexa	Abbott	leighanne_abbott@yahoo.com	856-495-1818	☐	☐	

Click Edit in front of the account you wish to no longer receive messages.
Select which type of message they should not receive. Click Update.

Email Schedules

Your studio can have the add on option of emailing out your school schedules.

This option needs to be customized for each school and will have a one time only added expense for set up.

If your school is set to email schedules, here are the easy steps.

- Go to Report->Student Roster Report by Student
- Click Email Schedule

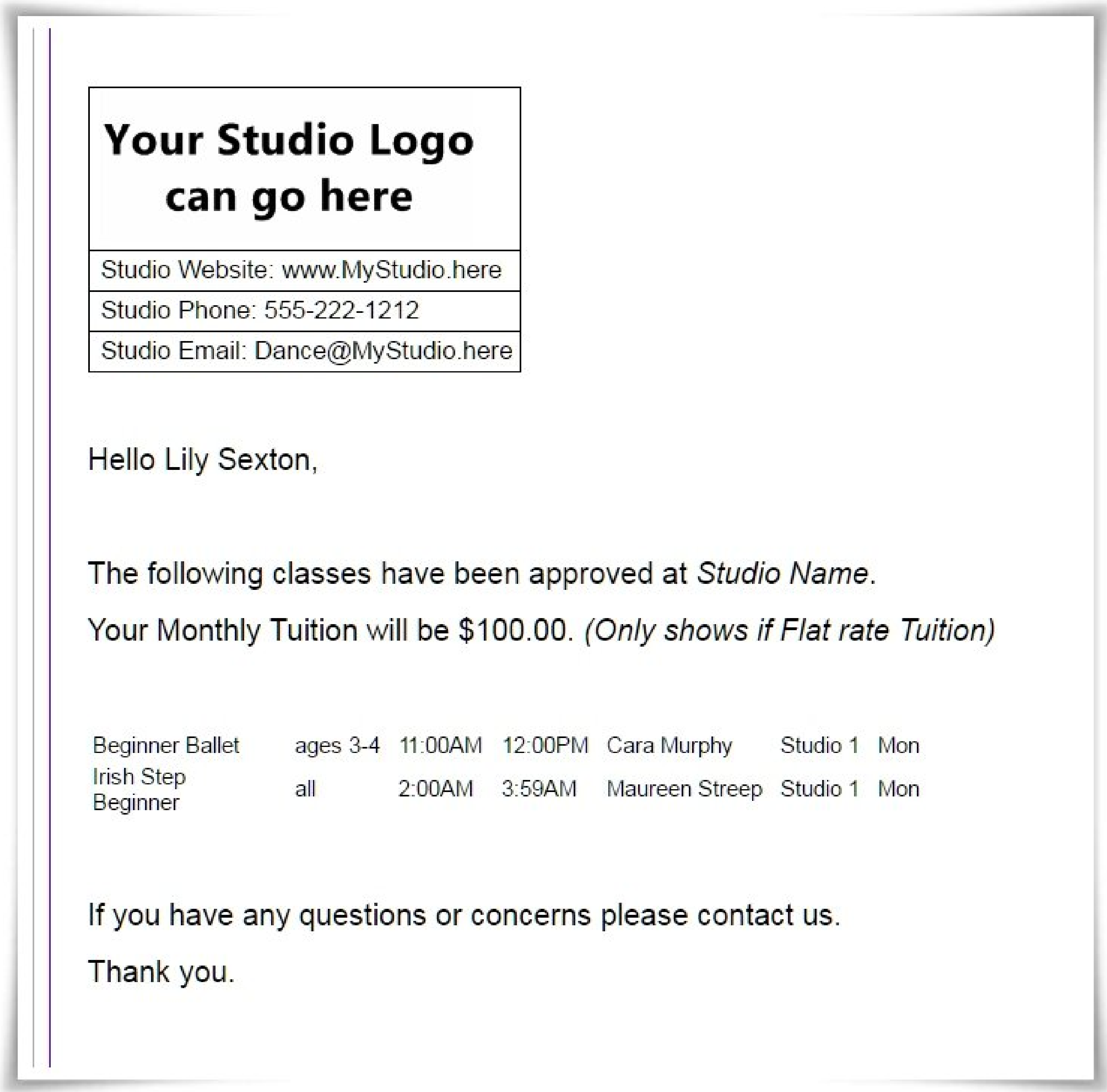
Please Note:

- The system will automatically group by student for you.
- It will automatically select the default season. If you wish to send a schedule for a different season, select it at the top .
- If you want to **send only 1 student's schedule**, filter for the student's first and/or last name. (The first name is the 8th column filter. Last name is the 9th, typically off of the page. You can Tab (keyboard key) accross the filter boxes to get to it, or use horizontal scroll bar on the bottom.)

- You can also **filter for a specific class** and email the schedule if there is a class change.

> **!** Keep in mind, you must keep the rows grouped by student. Each row displayed will be come 1 email.

Here is an example of a generic Student Schedule email:



Your Studio Logo can go here
Studio Website: www.MyStudio.here
Studio Phone: 555-222-1212
Studio Email: Dance@MyStudio.here

Hello Lily Sexton,

The following classes have been approved at *Studio Name*.

Your Monthly Tuition will be $100.00. *(Only shows if Flat rate Tuition)*

Beginner Ballet	ages 3-4	11:00AM	12:00PM	Cara Murphy	Studio 1	Mon
Irish Step Beginner	all	2:00AM	3:59AM	Maureen Streep	Studio 1	Mon

If you have any questions or concerns please contact us.

Thank you.

Customizing your Schedule message

You can customize the Schedule alert that is used to email the Student Schedules.
Go to Admin->School Setting Types-Alert Types
Edit StudentSchedule

> ✻ If you do not see this alert in your list, you are currently not able to send schedules.
> Please contact CompuDance if you would like this capability.

You can change the default alert to include your logo, other contact information and edit the text around the schedule.

Please note that if you write in a personal message for a one time use. You must come back to the alert and edit it out before you send the next schedule.

If you need assistance, please call or email us what you would like to do.

Bulletin Board posting

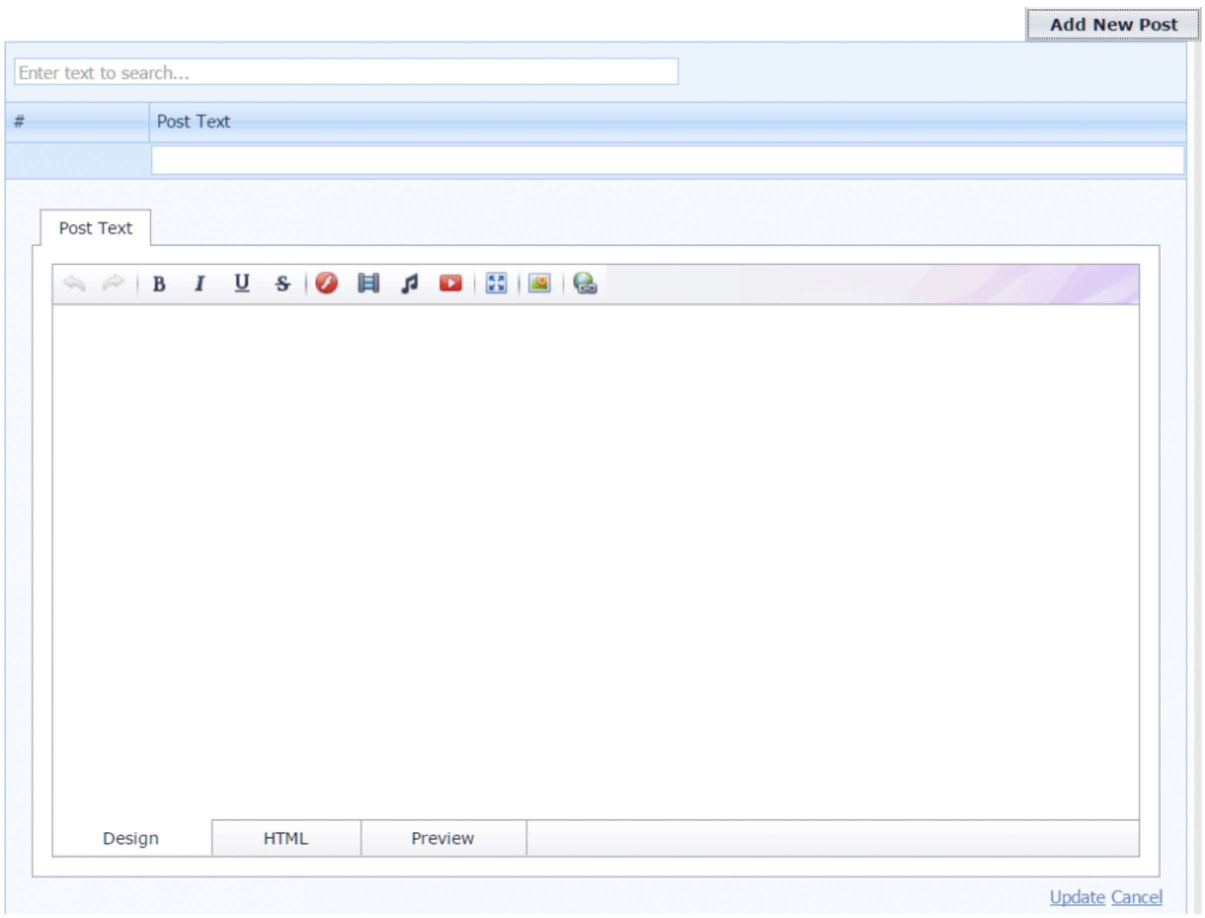
You have the ability to post bulletin board style in parent portal to all your parent users.

You may write comments, upload images, link to videos/music or websites.

Go to Mail on the top menu.
Select **Post to Bulletin Board** on the left side.

Add a Post (demo video below)

Click **Add New Post**



You will see the post editor open. You can upload any of the following items by clicking on the desired button.

 – To activate flash code in the post

 – To upload video or link to an online video that is not youtube (mp4 or mov)

 – to upload music or link to an online music file (mp3 or wav)

 – to link to a you tube video

 – To view the screen full size

 – To upload or link to an online picture (jpg or png)

 – To link to a website page

You can always call us if you need assistance creating a post.
Click Update to Save to the Bulletin Board.

Existing posts

Posts will be ordered with the most recent posts added at the top of the list.
If you wish to remove a post from the Bulletin Board. Click **Delete**.
You may edit your posts, by clicking **Edit** in front of that post.

Video Demonstration

This is a beta function. We will be working on it further to give you more functionality.

Some Images you can use for communications

We will be adding a list of images that you can utilize in your emails.

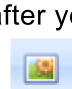
Image	image_url
	https://manula.r.sizr.io/large/user/8944/img/happybirthdayst.png
	https://manula.r.sizr.io/large/user/8944/img/happy-holidays-lighting.gif
	https://manula.r.sizr.io/large/user/8944/img/happynewyear.gif

	https://manula.r.sizr.io/large/user/8944/img/happy-new-year-sparkling-glitter-gold-animated-gif.gif
	https://manula.r.sizr.io/large/user/8944/img/happy-valelentines-day-red-heart-sprakling-animated-gif-card-2.gif

How to add an image from Express Message

Go to the Mail-Express Message section.
On the top select your recipients
Enter a subject line
In the body of the message you can enter text.
Click where you want the image to be placed.
Click the  button.
Go to the From the web (URL) tab.
Copy the link of the image (image_url) and paste it in the top line.
The image will appear below.
You may click the more options button if you wish to adjust the layout or size of the image.
Click OK.

You may change the layout options after you enter the image.

Just highlight the image and click the  button to adjust them in the From the web (url) tab.

Recital

The recital section can help you organize your shows.

Recital Admin – Set up your Recital Information- Recital Name, Individual Dances and Costume Details

Manage Recital – Put your dances in a recital, position the dance order, link the class performing each dance, add/remove students to the dance, assign costumes to be worn on the class or student level.

Reports
School Costume Report – Will show each Dance, class, student with their measurements and the specific costume details. Can be grouped/filtered/sorted/exported.

Dance List Report – You select the recital and it will display each dance, dance notes, number of dancers, class names and the teacher of the class assigned.

Student Conflict Report – Select the Recital and the number of dances that you want to see if there are conflicts for a specific student.

Recital Dance Participation Report – Chose the date range of your recital performances, this report will show with family the students and which performances they are performing in and for the dances in the current order. Helps to check for family conflicts or gives a final list of each student's dances across performances.

Dance Cast Report – Select your recital and this report will return the beginnings of your program. It includes the students actively linked to each dance in the order it is to be performed. We even include the class names and teachers if you want to give them recognition.

The Dance Book is an optional feature we can get you that will be your backstage/lighting handbook for each performance. It will show one page per dance in order. The Dance Name, photo of the costume (if applicable), Number of students, Names of students and Recital Dance notes. Sample below.

Your Dance Studio Name

Show 4-06/19/2016

4 - Boy From NYC

Classes:	Dark Pink Jazz Co
# Students:	11
Students:	Jessica Alba, Miley Cirus, Farrah Faucett, Janet Jackson, Kim Kardashian, Heather Locklaire, Jennifer Lopez, Brook Shields, Tiffany Spacey, Oprah Winfrey, Moonbeam Zappa
Teachers:	Julianne Moore
Notes:	Any props. Lighting requests. Entrance directions.

Recital Admin

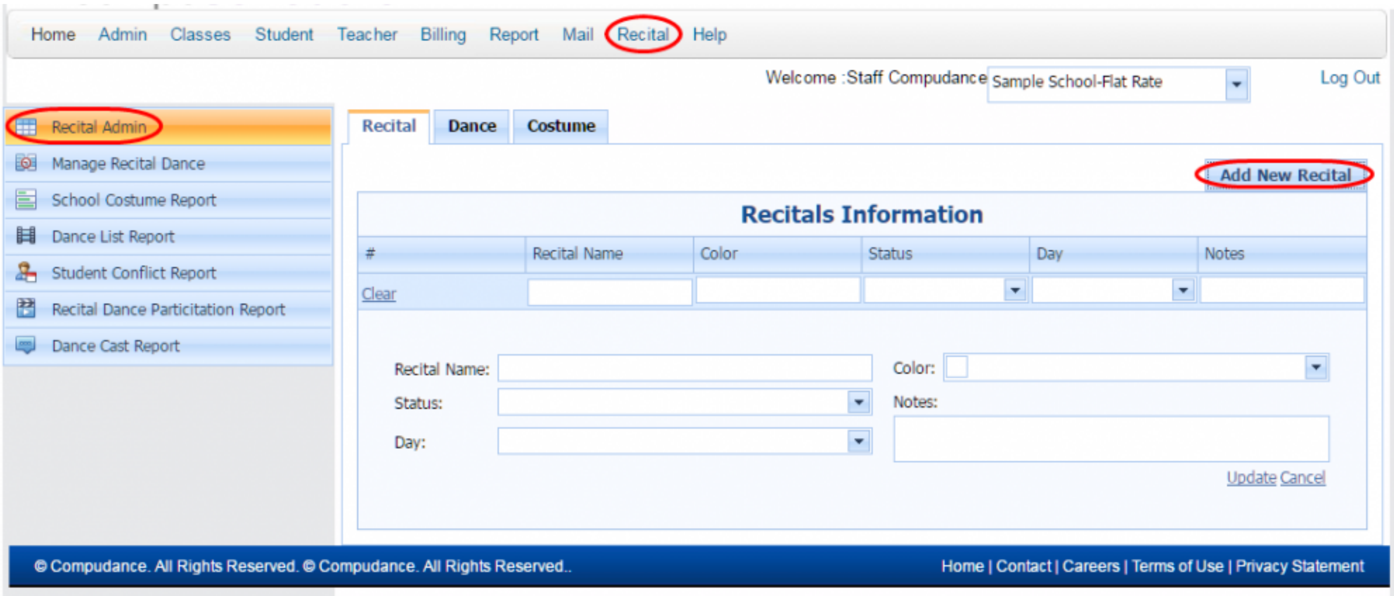
Recital Admin helps you organize your information. It contains 3 tabs of master lists so that you can edit the data and it will change throughout the module. Once the Recitals and Dances are entered, they can be linked together in the manage section with classes to help you organize the dances in the proper order for the least amount of conflicts.
This video will walk you through utilizing the Recital admin section.

See Table below for details of each tab.

Tab Name	Function
Recital	Create your recital
Dance	Create your Dance. It can be added to multiple recitals with different classes performing them.
Costume	Optional: Enter your Costume details. Link it to classes/students to get specific ordering info.

Recital Tab

To add your recital, click Add New Recital button on the top right.



Enter the Recital Name

You must chose a color to represent this recital.

Chose the date the recital will take place on.

Set your Status to Active.

Notes are optional.

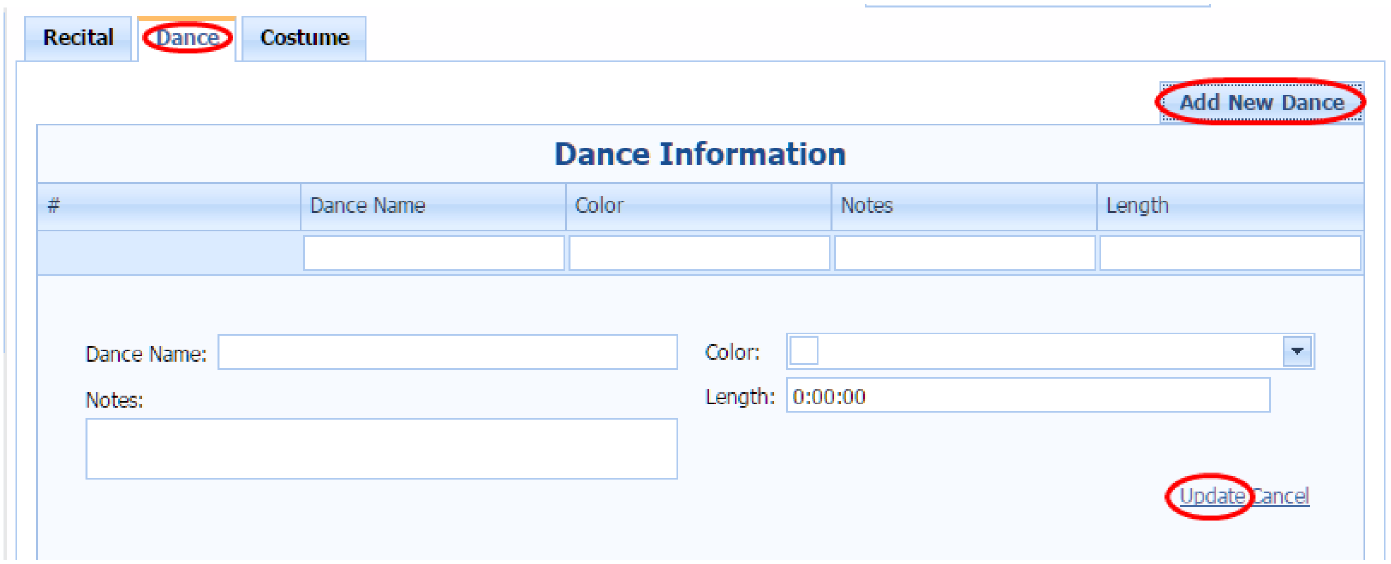
Click Update.

You can always change this information by clicking Edit.

Dance Tab

Each Dance can be entered, linked and then edited.

To add a Dance, Click Add New Dance button on the top right.



Dance Name is required. p(banner tip). You do not have to know the final dance name when creating a dance. You can substitute in a Class name or other text until you know the name. Then come back to Edit it.

Color is required. Use the drop down arrow to select from our color grid.

Notes are optional.

The length of the dance defaults to 0:00, you may edit it to the length of the song. Keep in mind the format is Hour:minutes:seconds (H:MM:SS)
If you enter your dance lengths we are able to calculate your recital length for you. Just contact us and let us know if you want to input estimated time between performances.

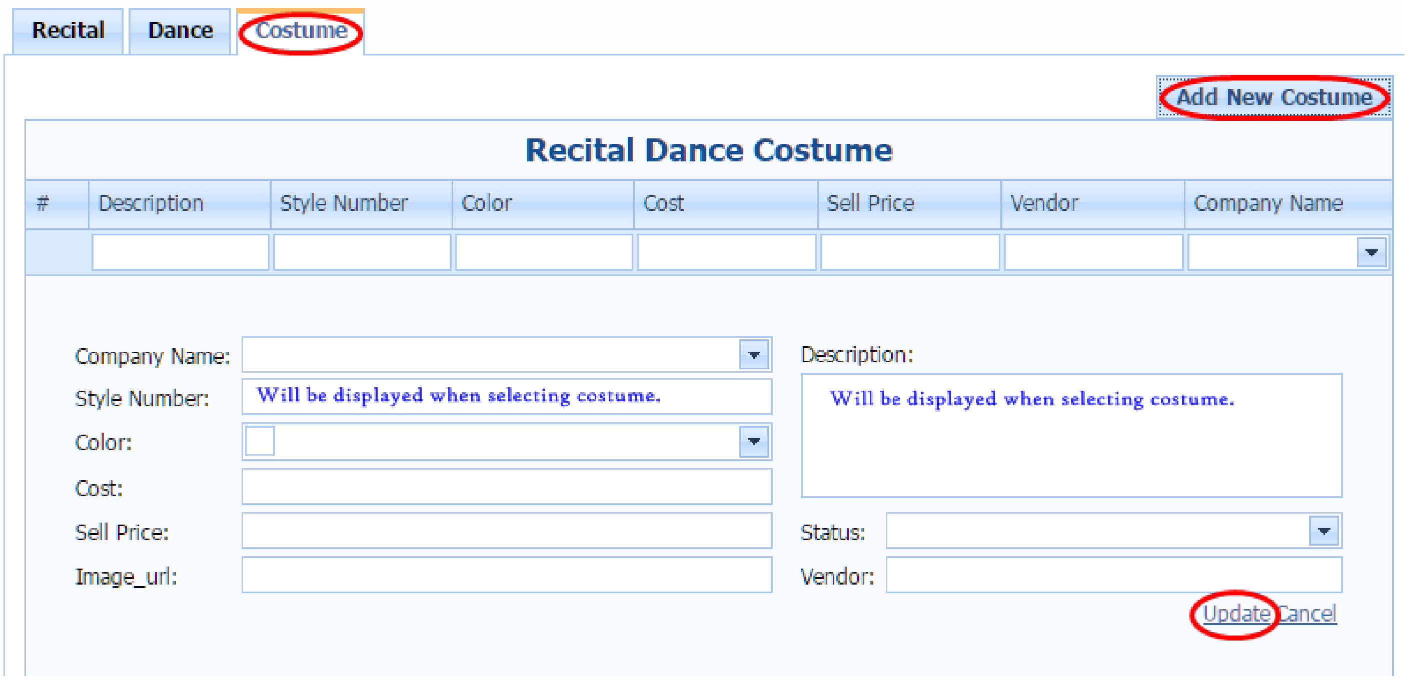
Click Update to Save

> If you do not want to see previous recital information, you can ask us to remove the recitals, dances and costumes that were previously created.

Costume Tab

This tab is Optional.
You can add the costume details to the recital section.
This will allow you to use the Costume Report which will autosize based on the specific costume assigned.
You can also request a Dance Book to be made which will display the photo of the costume per dance with other information.

To add a costume, Click Add Costume in the top right corner.



The form will appear. No fields are required.
You will need to enter in the **description** and **style number** to properly assign the costume to a performance.
You may select the **Company Name** to have the Autosize -recommended size for this student for this specific costume manufacturer.
The **Cost** and **Sell price** can be entered.
You can input an **image_url** from the manufacturer's web catalog to link it to our system. * To do so, open a different web tab or window. Find the picture of the costume. Hover over the picture, right click and copy image address. Paste address into Image_url field.
Set the **Status** to Active.
The **Vendor** is either the manufacturer or a third party sales/rental company.

You can always return to this section to Edit the information entered.

Delete previous Recitals

If you do not want to see previous recital information, you can ask us to remove the recitals, dances and costumes that were previously created.
Just email us your request from the studio email address.
If you started entering in information for this year, please let us know when you started that entry.
For example: Please delete my recital information entered in 2016.

Many studios may want to keep this information so they can reflect back if they performed to a specific song or used a specific costume.

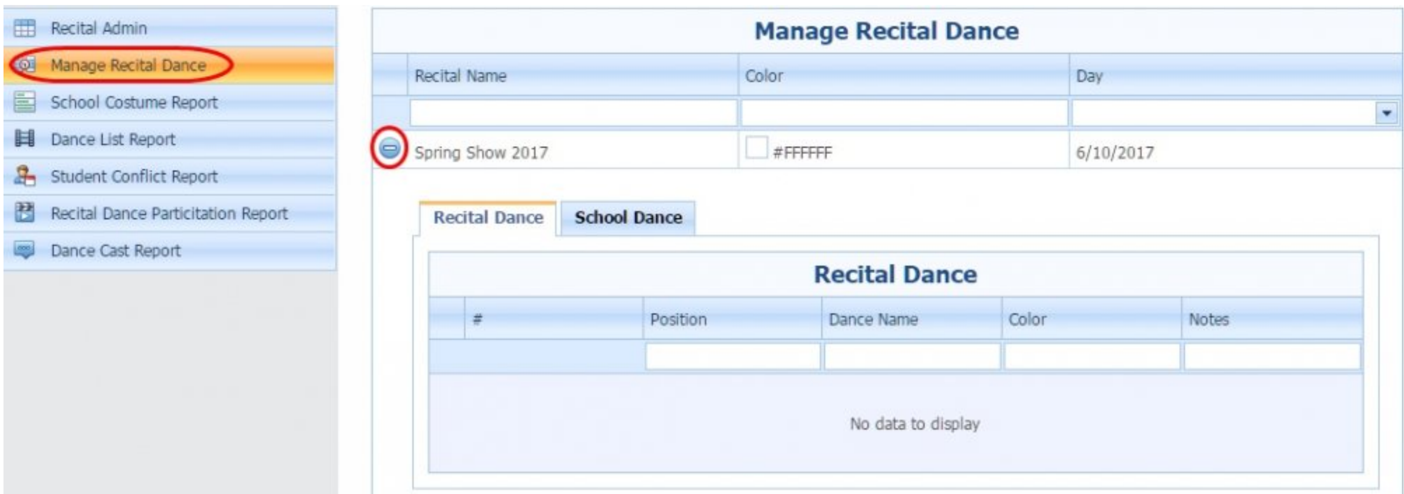
Manage Recital – Linking Dances and Classes

In this section you will be able to add and order your dances, link the classes to the dances they are performing in and link or unlink students to the specific dance in the assigned class. You can also set the costumes to be worn for the dance by the class or individual student. Costume sizes may also be specified for this specific dance costume.

You will first need to add the [Recital and Dances in the admin section.]()

Then in Manage Recital you will see your Recitals listed.

Click the plus or arrow to open.



The first tab, **Recital Dance**, will show the Dances already linked to this recital.

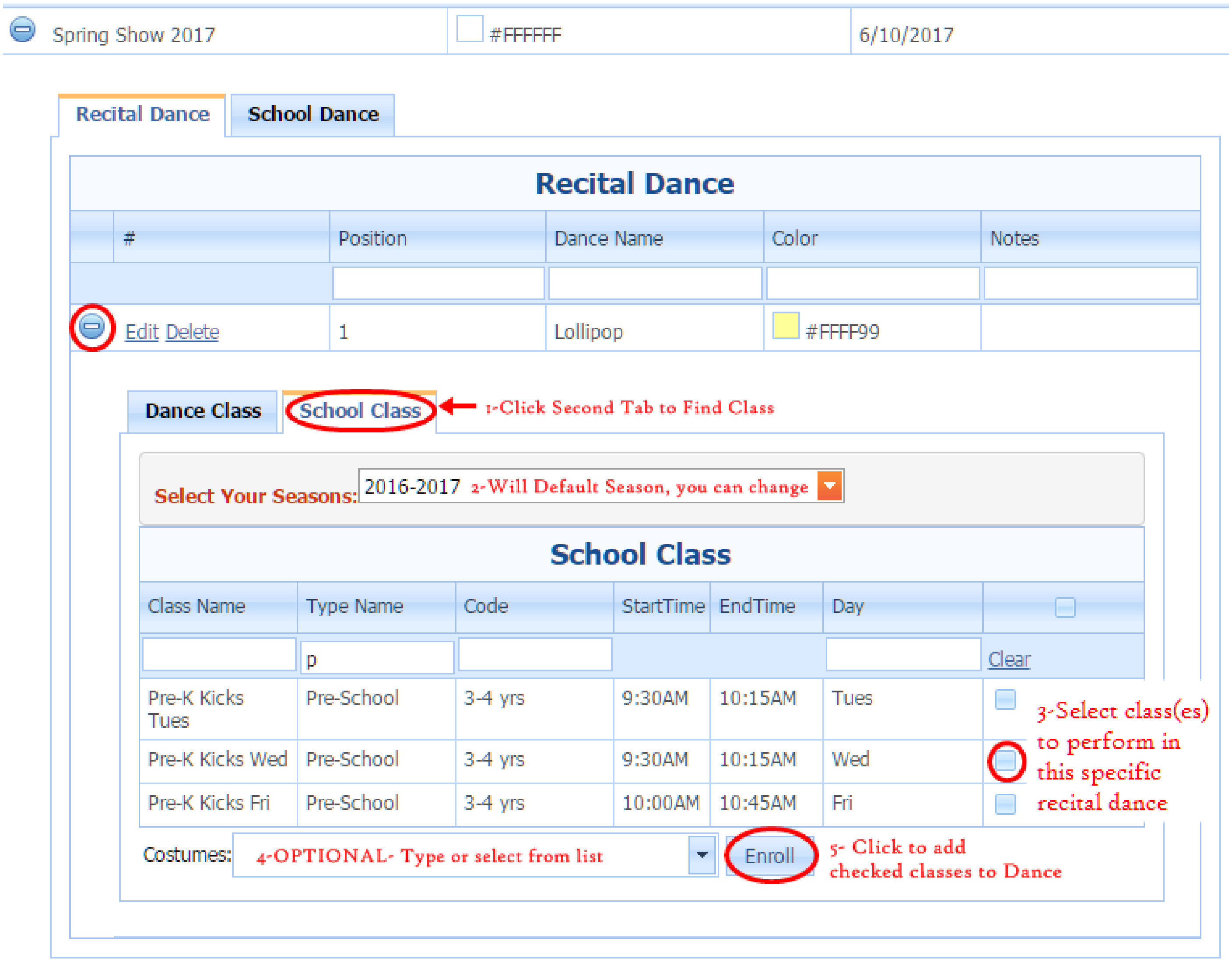
Click the second tab, **School Dances**, Will list all of the dances that are not currently linked in this recital so that you can link them.

Check on the right side, the dances you want performed in that recital. Then click the Link To Recital button.

You can link multiple selections at once. You can always delete them later if changed or added in error.

> If you do not want to see previous recital information, you can ask us to remove the recitals, dances and costumes that were previously created.

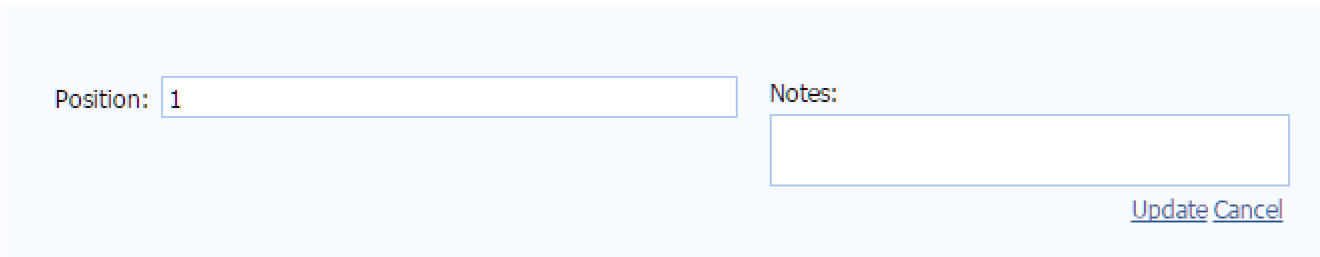
To Enroll a class to perform a specific Dance – click the to expand the details of the dance.
The first tab will show any classes already linked to perform the dance. You can have more than 1 class in the same dance.
The second tab will list the Classes in your school who are not already linked so you can select them.



The season will default to your default season. You can change it to select other season classes.
On the right side, select the classes to perform. You may filter to find them.
At the bottom, you can assign a Costume for this class to wear for the dance. You can also edit or add them to the individuals.
To select the costume you may type the Description name or use the drop down arrow to select from the list. Costume will need to be entered in the [Recital Admin-Costume Tab](#) before being assigned.
Click Enroll.

Add Dance Notes

To add a note to a specific Recital Dance
Go to Manage Recital.
Click the plus or arrow for the recital you wish to see.
Find the dance you want to add notes to.
Click **Edit** in front of that dance.



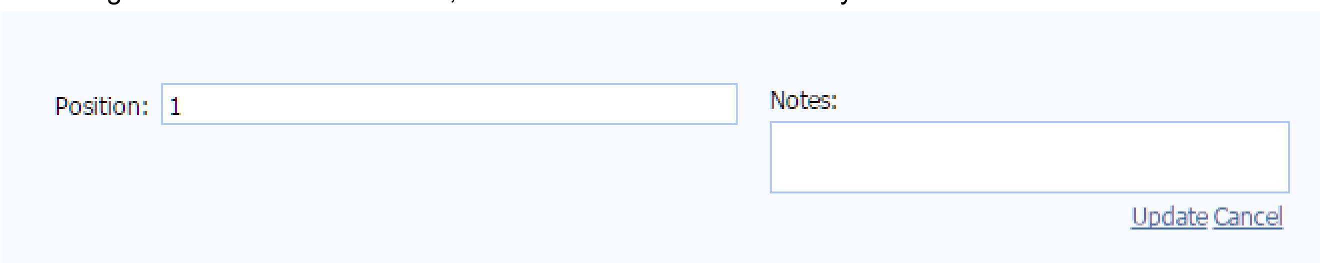
When you edit a dance, you can change the dance order in the recital- Position
Add/Edit Notes for that dance. These notes are the ones used in the Dance Book report
To save your changes, Click **Update**.

Change Order of Dances

When you click the plus on the recital, you will see a list of all the dances in that performance.
We recommend you reorder your dances starting at position one to the end or reverse.

Tip!	When you reorder the dances, all of the dance numbers that are positioned between the starting position and new position number will shift. For example: If you are editing Dance position 3 to position 8, the dances currently in position 4 through 8 will all slide down one spot to be 3 through 7. Then the original 3 is number 8.

To change the order of the dances, click **Edit** in front of a dance you want to move.



Change the Position number to the position you wish to move the dance.
Then Click Update.

Student Participation

If you have students who are not participating in a recital dance with the class linked, you may remove them from the Dance.

Go to Manage Recital

In the Recital Dance tab, Click the plus to the Dance

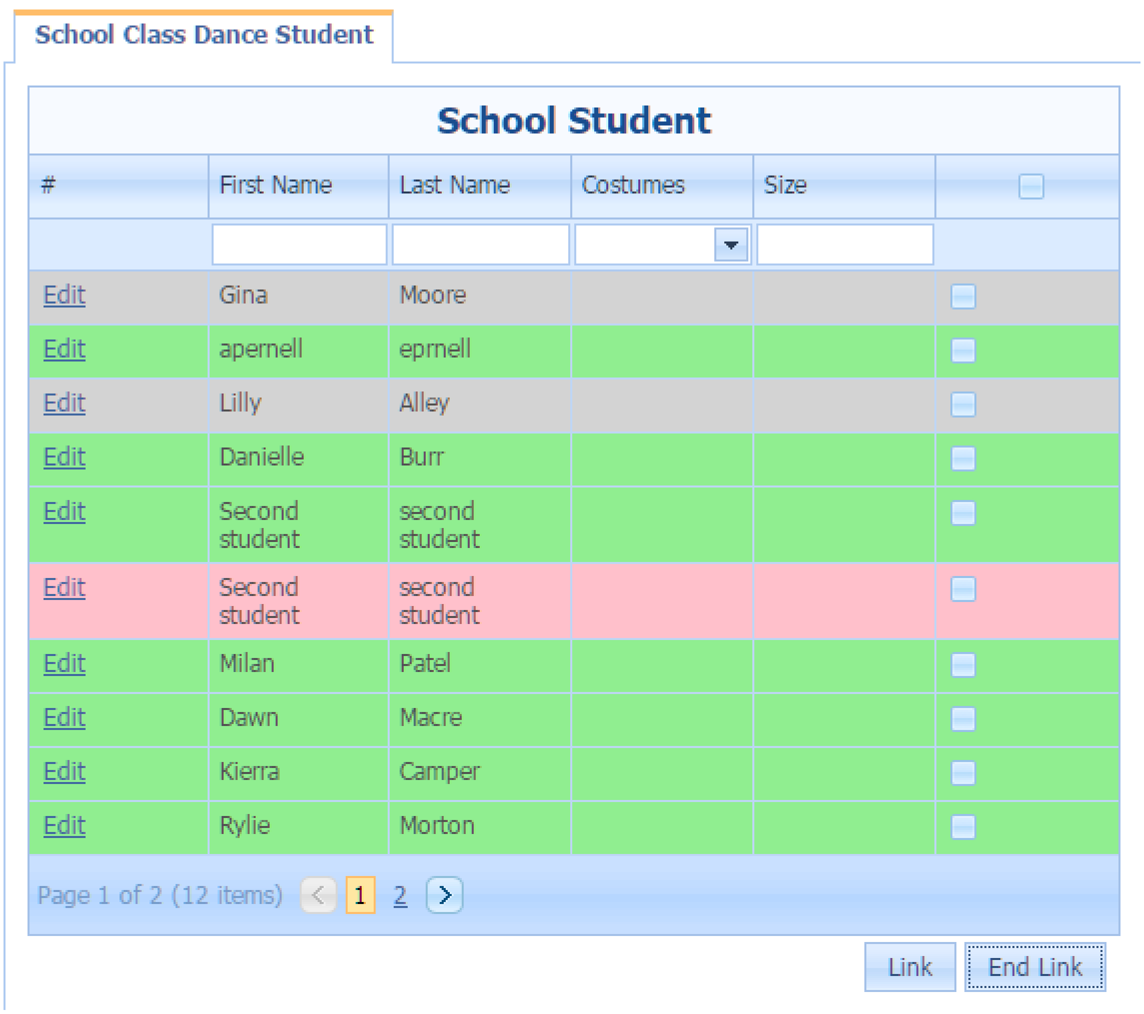
In the Dance Class tab, Click the plus to the Class

You will see all the students in the class.

If a student is green, they are linked to perform in the dance.

If a student is grey, they have not been linked to perform in the dance. They were added to the class after the class was linked to the dance.

If a student is red, the student was unlinked and is not participating in the dance.



School Class Dance Student

School Student

#	First Name	Last Name	Costumes	Size	
Edit	Gina	Moore			
Edit	apernell	eprnell			
Edit	Lilly	Alley			
Edit	Danielle	Burr			
Edit	Second student	second student			
Edit	Second student	second student			
Edit	Milan	Patel			
Edit	Dawn	Macre			
Edit	Kierra	Camper			
Edit	Rylie	Morton			

Page 1 of 2 (12 items) 1 2

Link End Link

To link a student in the class to participate in the dance, check the student box on the right and click the Link button.

To remove a student who is in a class from participating in a dance, check the student box on the right and click the End Link button.

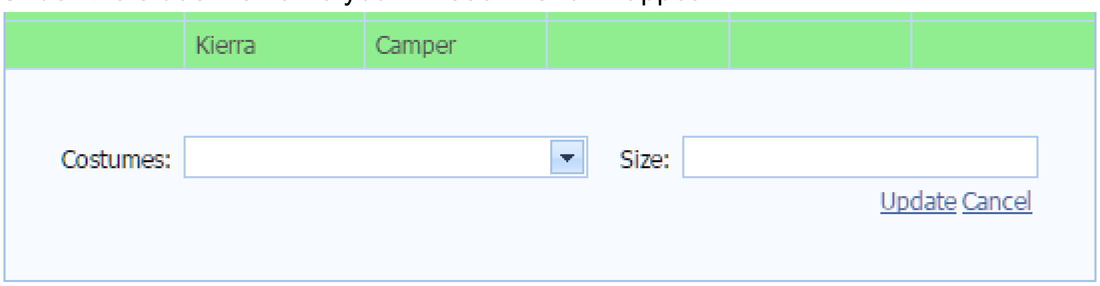
You may remove a group or almost all students in the class by using the select all button. Unselect the students who will be performing the dance and then clicking Unlink. The students who were checked off will be removed from the dance performance. (Their class status will not be affected.)

Student’s Costume

If you wish to designate a specific costume for a student in a class dance, you may.

Go to Manage Recital
Click the plus for the recital.
Click the plus for the dance
Click the plus for the class.

Find the student in the class list.
The student should be Green to represent they are participating in the dance.
Click Edit in front of the student’s name.
Under the student’s name you will see this form appear.



You may select a different costume from the class costume.
You may enter a size for this student’s costume, specific to this dance.
Click Update to Save.

School Costume Report

The School Costume Report will display every recital with the dance and each student that is participating. All columns can be filtered, grouped and sorted.
This report can be exported be saved or modified outside of the system.

The Data Displayed are:
Day Date – This is the Date of the Recital. (You can edit recital information by going to the Recital Admin-Recital Tab.)
Recital Name – The Name of the Recital.
Dance Name – The name of the dance. (You can edit it by going to the Recital Admin-Dance Tab.)
Class Name – The name of the class assigned to the dance. The class is linked to the dance in Manage Recital.
Company Name – This is the manufacturer of the costume assigned to the student or class.
Style Number – This is the style number entered for the costume assigned to the student or class.
Color – The color selected for the costume.
First Name – First Name of the student assigned to participate to the recital dance.
Last Name – Last Name of the student assigned to participate to the recital dance.
Override Costume Size – This is the Recital Dance Student Costume Size. You can enter/edit this size in the Manage Recital-Dance-Class- Student-Edit
Bust, Waist, Hips, Inseam, Outseam, Girth, Manual Measurement Size, Misc, and Height are all from the student's measurements entered. These can be entered by the class or in the student detail measurement tab.
Vendor – this the the name of the vendor entered in the Recital admin-Costume tab.
Age – The current age of the student based on today's date and the birth date entered on the student record.
Autosize – This is the calculated size for this student wearing a costume from the costume Company based on the size charts for the age of student and girth measurement.

The video below will show you how to group and reorder columns in the report.

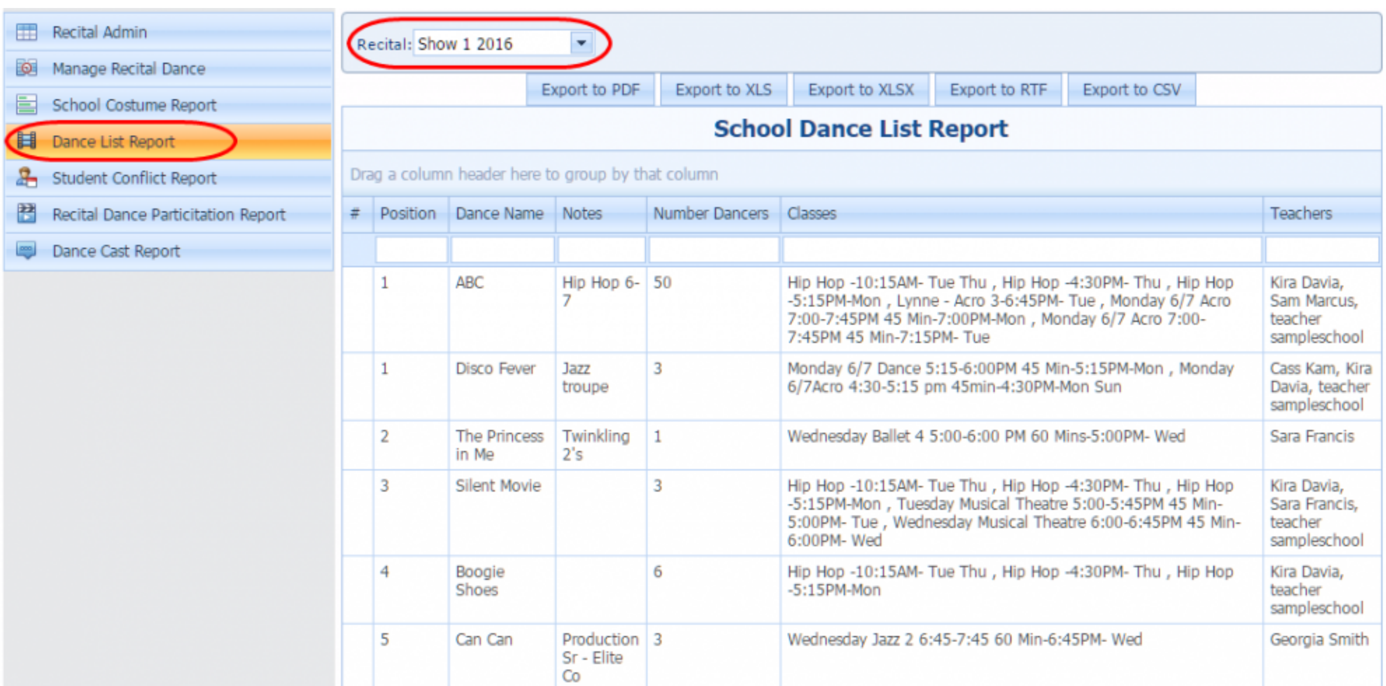
Dance List Report

The Dance List Report will help you organize your shows.

Initially you will select the show you want.

It lists the position of each dance, the dance name, Dance Notes, Number of Dancers, the Class Names linked, the teachers of the classes.

You may group , filter , sort and export this report.



Student Conflict Report

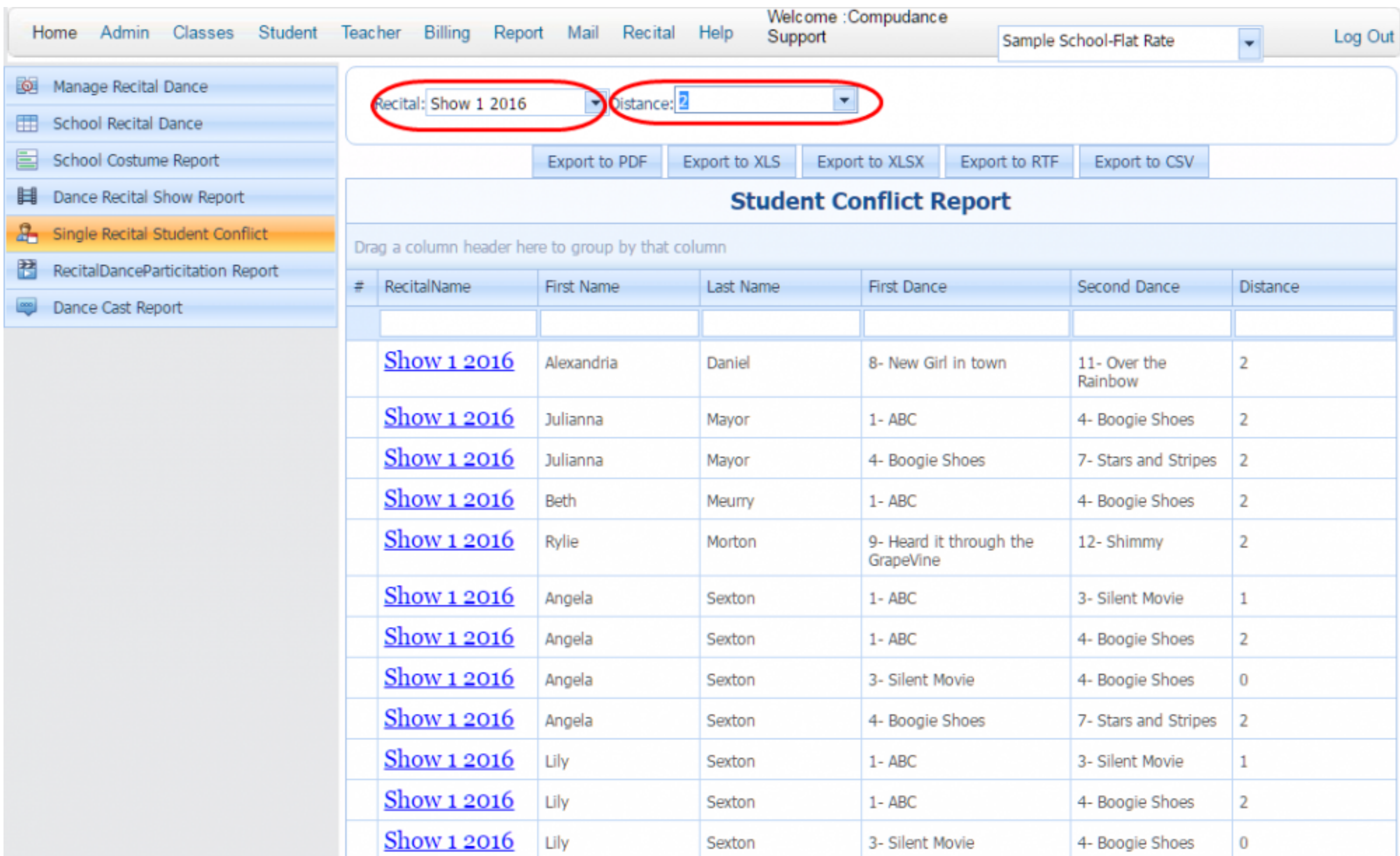
The Student Conflict Report will show you the dancers who have less than or equal to the number of dances in between their numbers.

It will show your quick changes!

Select the Recital you want to check. Then chose the **number of dances** that you want to see dancers have equal or less between their specific performances.

For example if you want to see all dancers who have 2 or less numbers in between their specific numbers, chose the number 2.

The report will list each dancer and the names of the dance that have conflicts.



You can filter or sort this report to show the zero time changes

The first column has the show name with a hyperlink. If you click it, it will bring you to the dance order so you can re-position the dance order.

Once the order is changed, you will want to run this report again in case you made other conflicts for different students.

This report can also begrouped to help you see the conflicts in different ways.

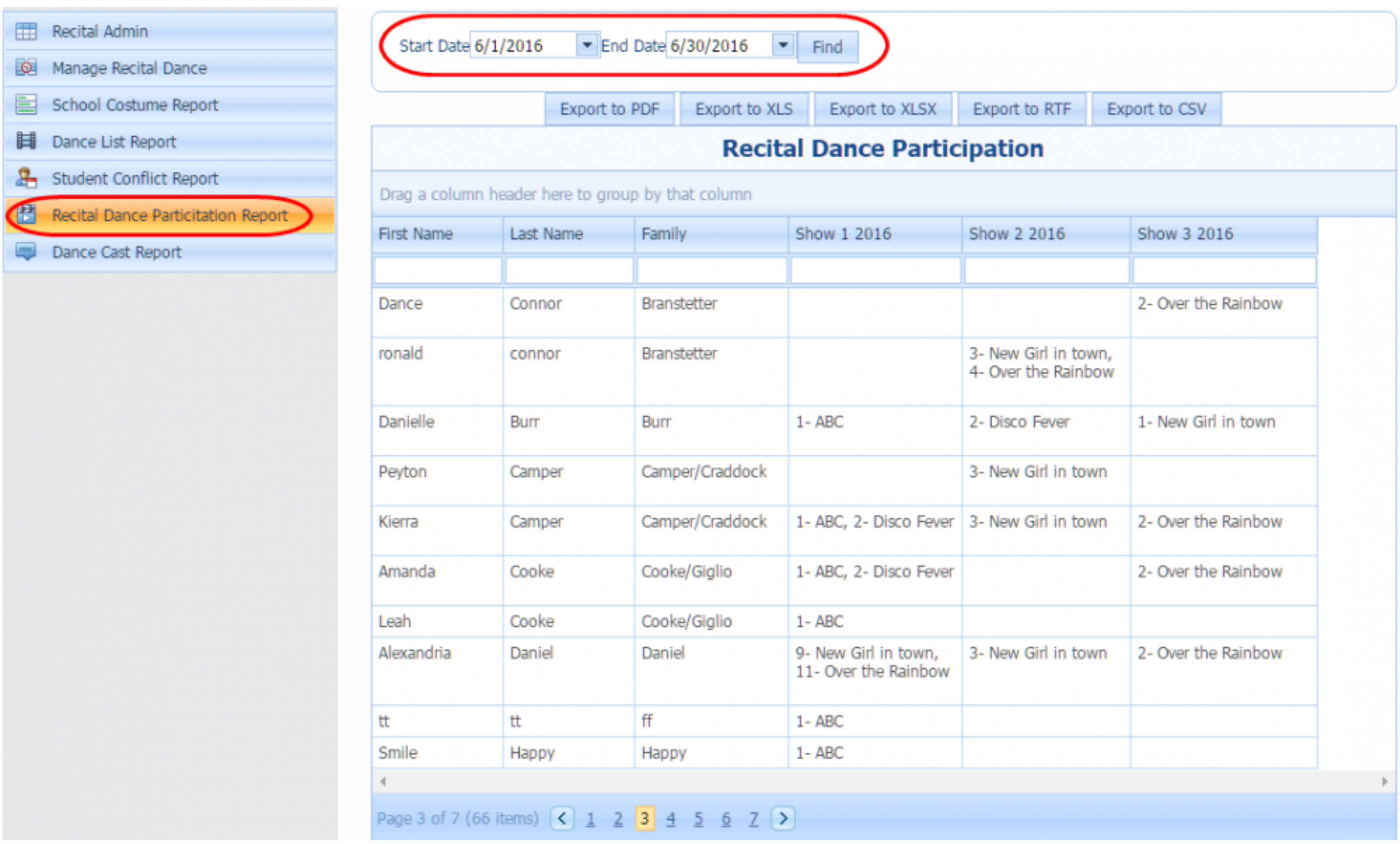
If a student is in more than 2 dances, they may be listed more than once on this report.
For example if the student is in dance number 2, 4, 5 and 8. If you search for 2 or less dances in between. The student will show conflicts for dances 2 and 4 (1 dance in between) dances 2 and 5 (2 dance in between) dances 4 and 5 (0 dance in between) dances 5 and 8 (2 dance in between)

Recital Dance Participation Report

This report will show you each dancers performances across a series of shows (up to 5 shows).

You can use this report to prevent conflicts for a student's classes in different shows, or to see where siblings are dancing in different performances,

At the top Select the date range of the performances you see.
The report will show each student, family and the show listing the dances they are participating in and the dance position per show.



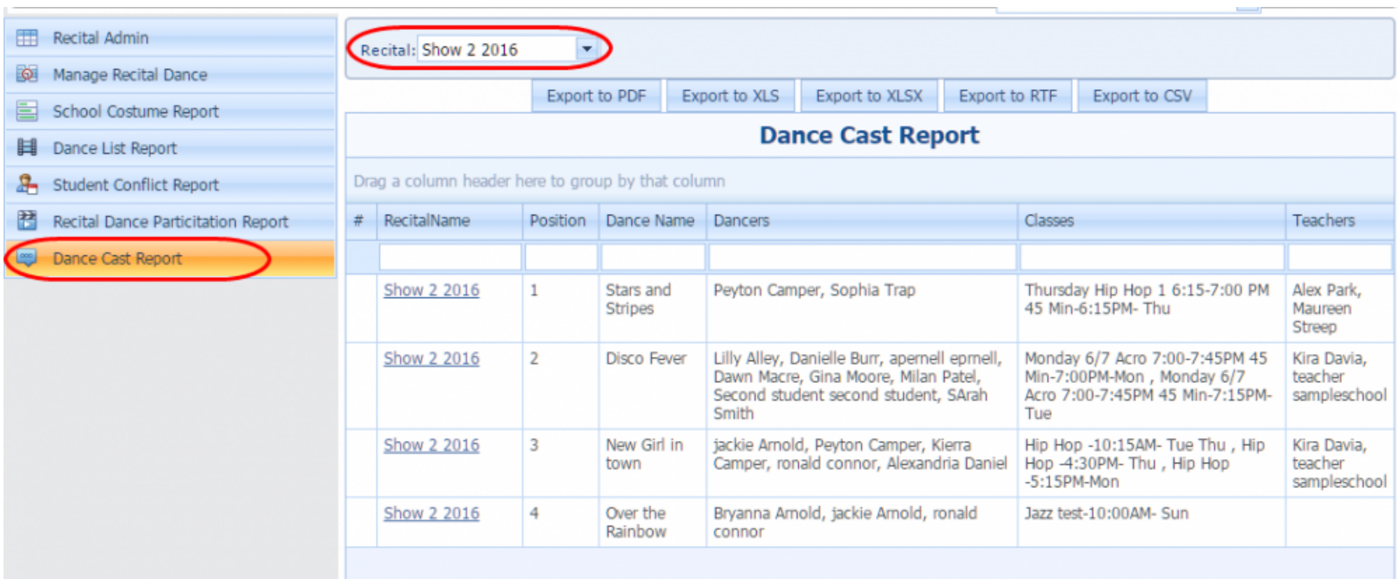
In the example above the Bransetter family has two dancer siblings slated for different performances.

Dance Cast Report

This report will be the start of your recital program!

Once your recital is set, you can run this report to get the dances in order, dancer names, class names and teachers.
The report is exportable to you can send the information to your printer or format it yourself.

To start, just select the show you want to see.



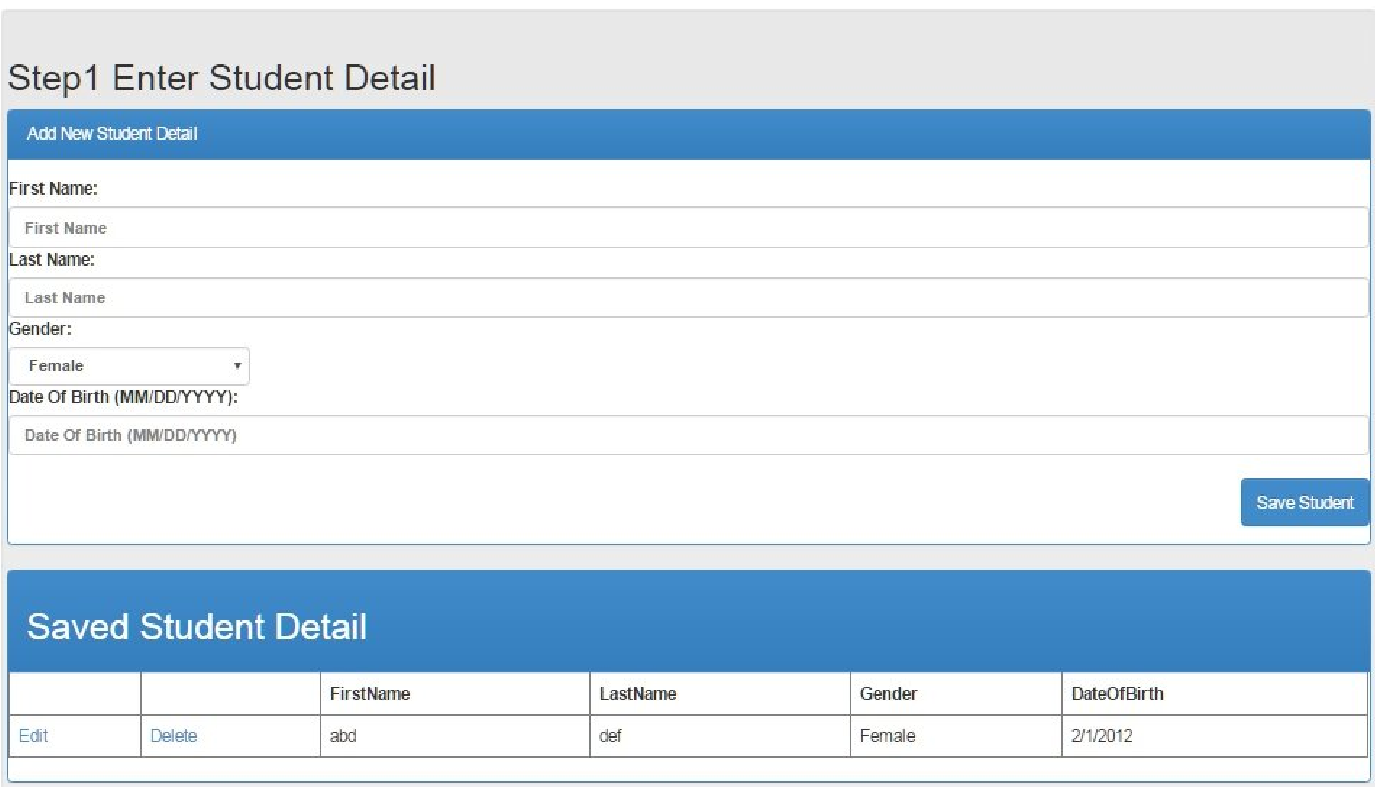
Online Registration

The school can offer Online Registration.
This will allow for a link to be placed on the school's website for New Student Registration.

> ✻ The end result will also allow the parent to login to the membership portal for future class enrollment, adding a sibling student, viewing/paying invoices and updating contact information. For more information see Membership portal.

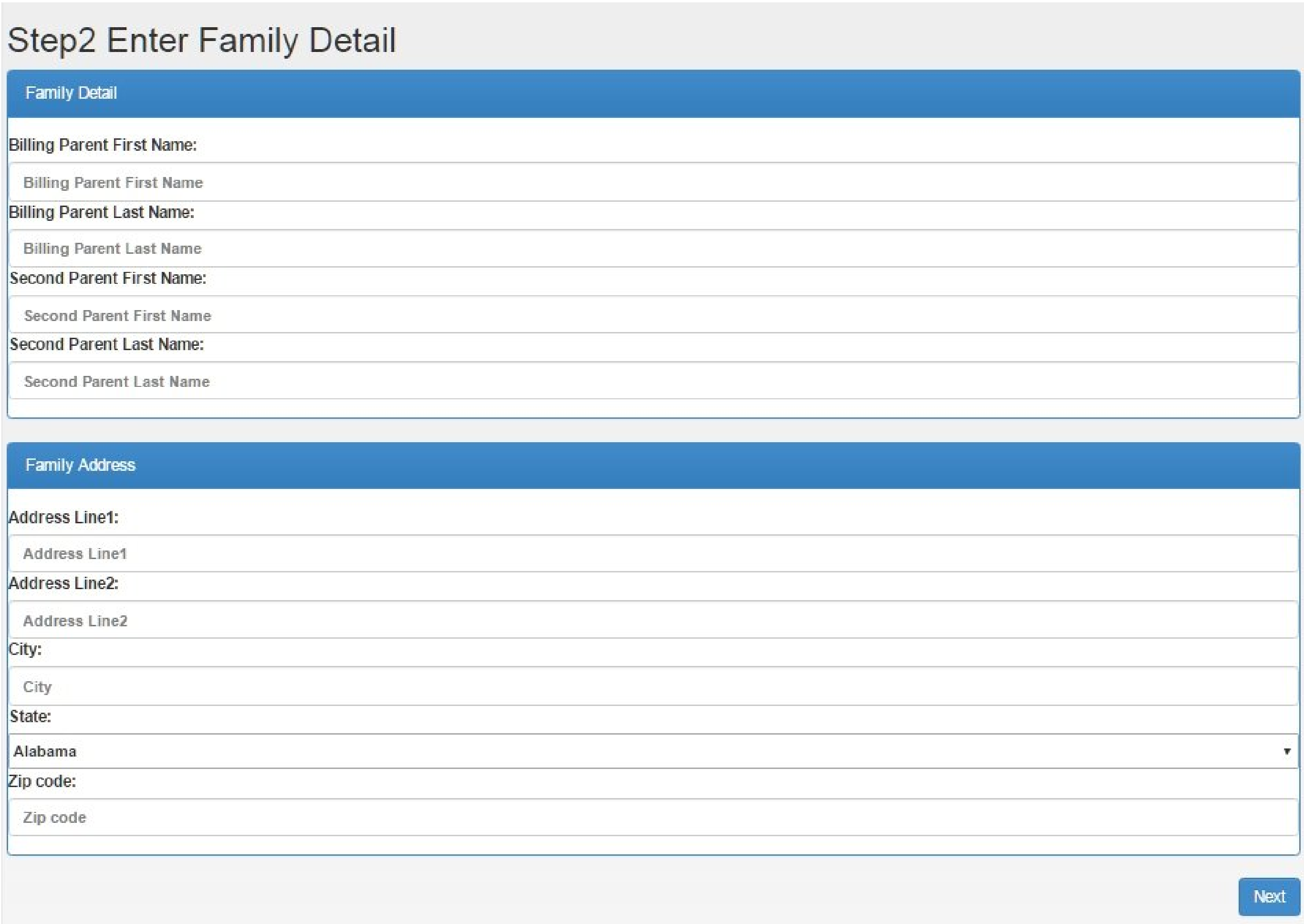
They will access the system from the New Registration link/button on your website. (Ask us for your specific studio's link if you need it.)
They are still required to enter an accurate, distinct email address and a cell phone number. They must also agree to your terms and conditions to create an account. They will be sent via email and/or text message a verification code to confirm they are a person.
The School Terms are set and edited in the Admin Alerts named SchoolTerms

Once the cell phone and verification number is entered. They will start the student registration.
They can save a student and then enter a second one.



There is one set of family information for all students. The billing person is mandatory. Second parent is optional.

This one address will be populated in all of the address fields. It can be edited by parent or studio if a student or parent lives in a different location or the family invoice should go elsewhere.



The School can set up Questions to be asked.

This can include a written response like Please list any allergies or medical conditions,

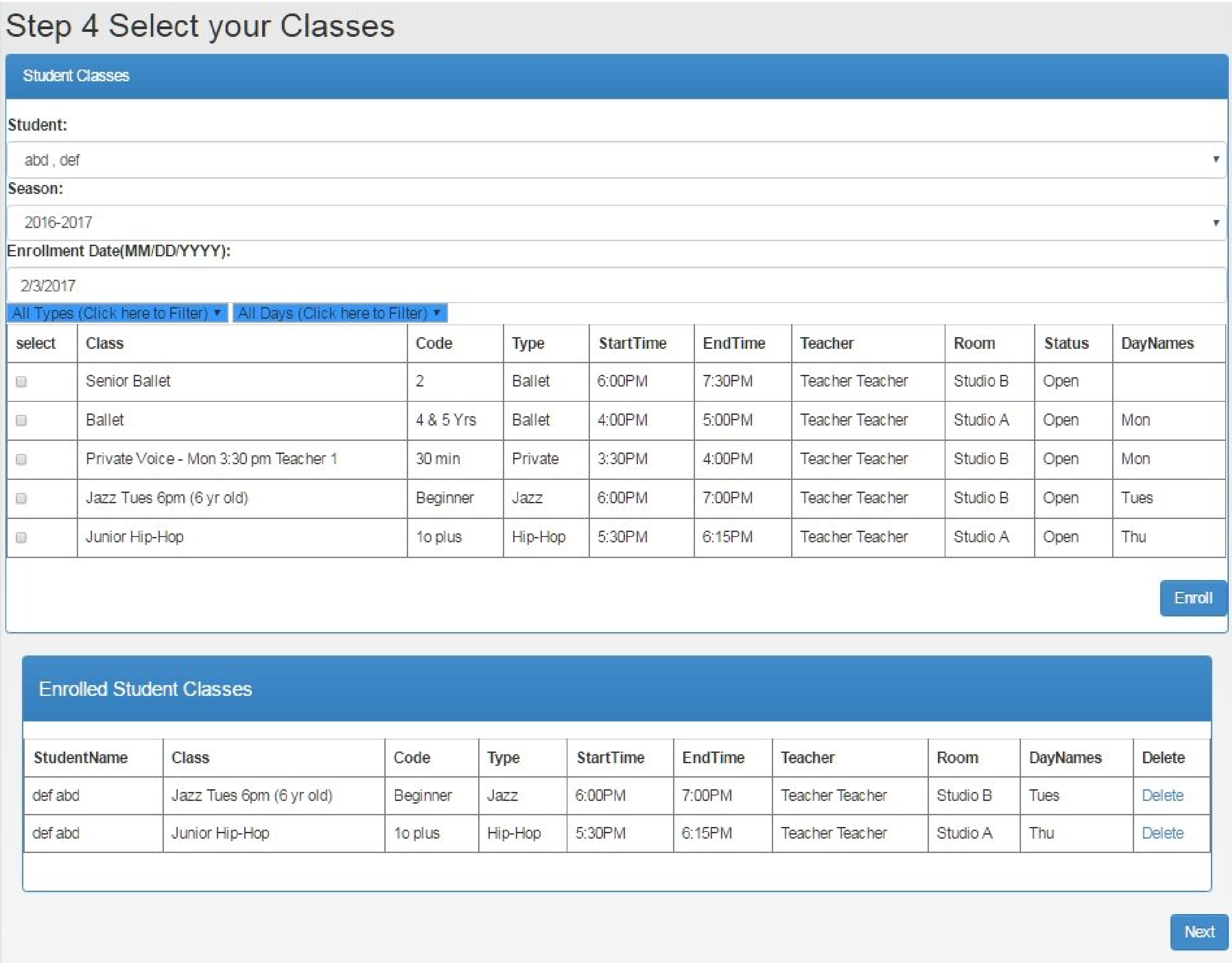
a drop down list to select how did they hear about the school to t-shirt sizes.

Some studios ask for an Emergency contact if parents can not be reached.

The Questions/answers are in the School Questions tab under the student.

There is a Questions Report to get your answers

Open Enrollment for classes is the next section.
The studio determines when to open the enrollment for a season by setting the School Season to Active.
Only Classes that have the Status of Active will be offered for enrollment. If the class is full, the class will show, but not allow selection.
If the class has a status of Do Not Show, the class will not be listed and only the studio will be able to enroll in it.



Step 4 Select your Classes

Student Classes

Student:

abd , def

Season:

2016-2017

Enrollment Date(MM/DD/YYYY):

2/3/2017

All Types (Click here to Filter) ▼ All Days (Click here to Filter) ▼

select	Class	Code	Type	StartTime	EndTime	Teacher	Room	Status	DayNames
	Senior Ballet	2	Ballet	6:00PM	7:30PM	Teacher Teacher	Studio B	Open	
	Ballet	4 & 5 Yrs	Ballet	4:00PM	5:00PM	Teacher Teacher	Studio A	Open	Mon
	Private Voice - Mon 3:30 pm Teacher 1	30 min	Private	3:30PM	4:00PM	Teacher Teacher	Studio B	Open	Mon
	Jazz Tues 6pm (6 yr old)	Beginner	Jazz	6:00PM	7:00PM	Teacher Teacher	Studio B	Open	Tues
	Junior Hip-Hop	1o plus	Hip-Hop	5:30PM	6:15PM	Teacher Teacher	Studio A	Open	Thu

Enroll

Enrolled Student Classes

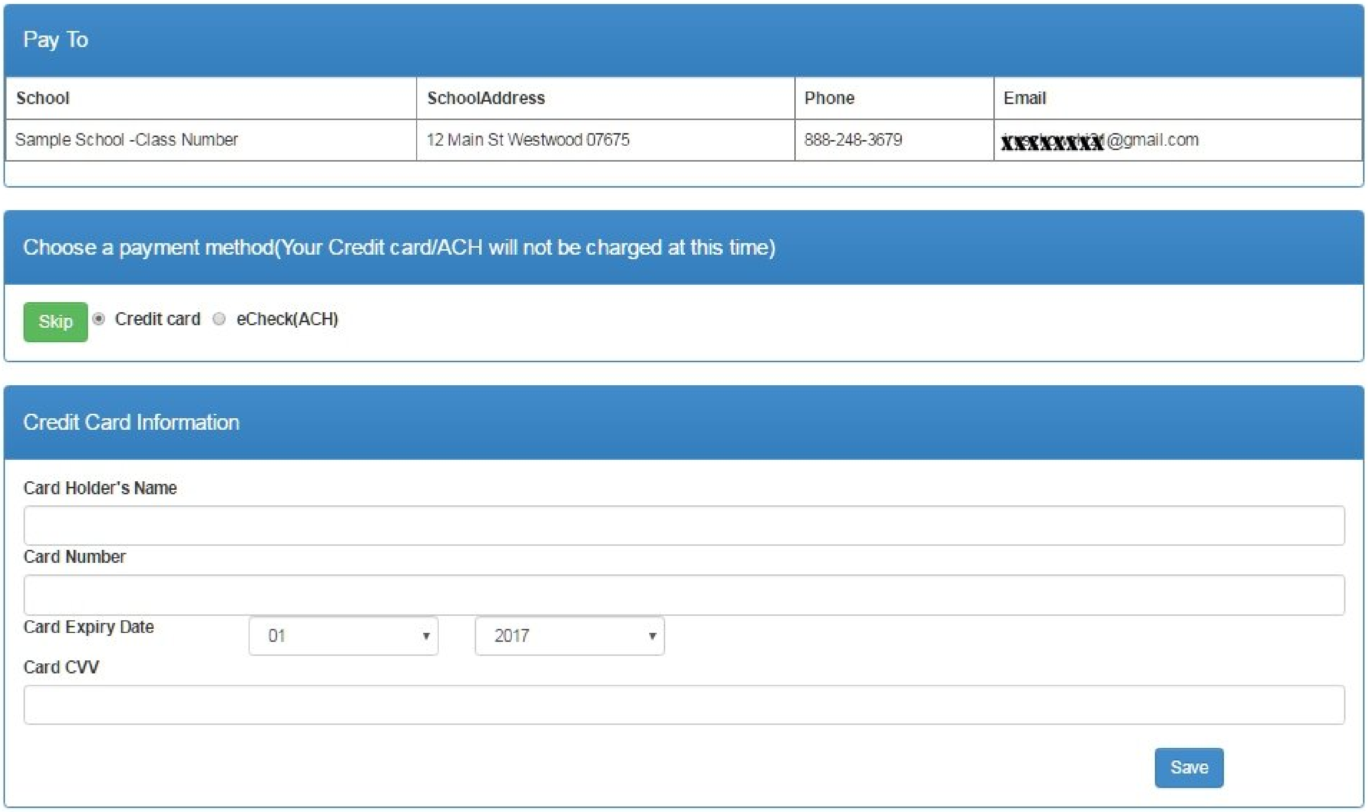
StudentName	Class	Code	Type	StartTime	EndTime	Teacher	Room	DayNames	Delete
def abd	Jazz Tues 6pm (6 yr old)	Beginner	Jazz	6:00PM	7:00PM	Teacher Teacher	Studio B	Tues	Delete
def abd	Junior Hip-Hop	1o plus	Hip-Hop	5:30PM	6:15PM	Teacher Teacher	Studio A	Thu	Delete

Next

If the school has a payment processor account set up, The following screen will appear for a payment option to be stored on file in the processor’s vault (not CompuDance).

A studio can allow the parent to be required to enter this payment information or they can have the option to

Skip the payment account storage. See Gateway information.



Once the registration is complete, the system will automatically send out a Welcome letter from the studio with their login and password. The school may customize this letter to direct the registrant as they wish. You will find this letter in Alert Types named SignUpPassword.

If the school has a Pay at Signup Income category, it is created when the student registration is complete. The registrant can then log in to the portal to pay this invoice.See membership portal for more details.

> The school will receive an email when a student is enrolled in classes. It will note the student status (Active-Inactive.)
> The school can also use the Student Online Register to see the enrollments.

The students/parents have their own manual which can be found clicking here.

Parent Portal / Membership

The Express Connect/Parent portal allows your customers to login to the system after they have previously been registered.

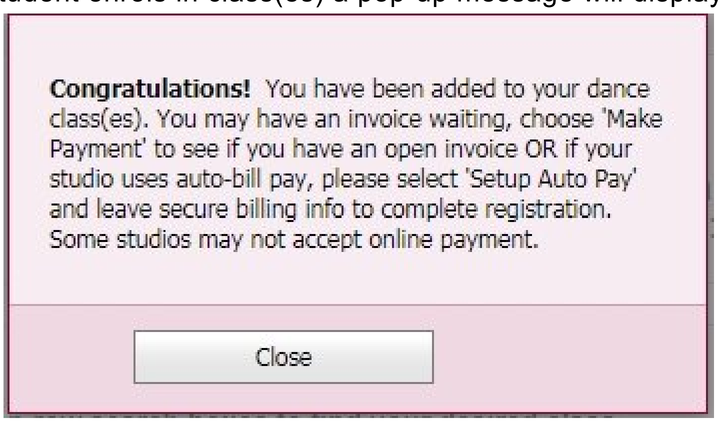
The parents will have access to the School's Terms and Conditions. If the terms are changed by the studio at any time, each parent will be prompted to open to read it and accept the new terms. See Parents Accepting School Terms

The online enrollment is available to the parent for enrollment in class when the studio decides to open it.

- It will only display the Season that has a status of Active.
- It will only display the classes in that season that has a status of Active.
- It will only allow enrollment in a class if there is room in the class.

In the Parent Portal, when a student enrols in class(es) a pop-up message will display.

This is the default message->



You have the ability to change this popup message after a previously registered student enrols in a new class(es). Click Here to see how.

New Parent Portal – Here is the manual the Parents get. You can also log in as a parent to check it out!

<u>There are enhanced membership features in the portal that allow your customer to:</u>

- View the student's calendar
- Check student's attendance
- View/Pay invoices
- View School Bulletin Board – How to post on the Bulletin Board for your parents to see your posts.
- Update payment information on file (Can be entered initially through New Registration.)

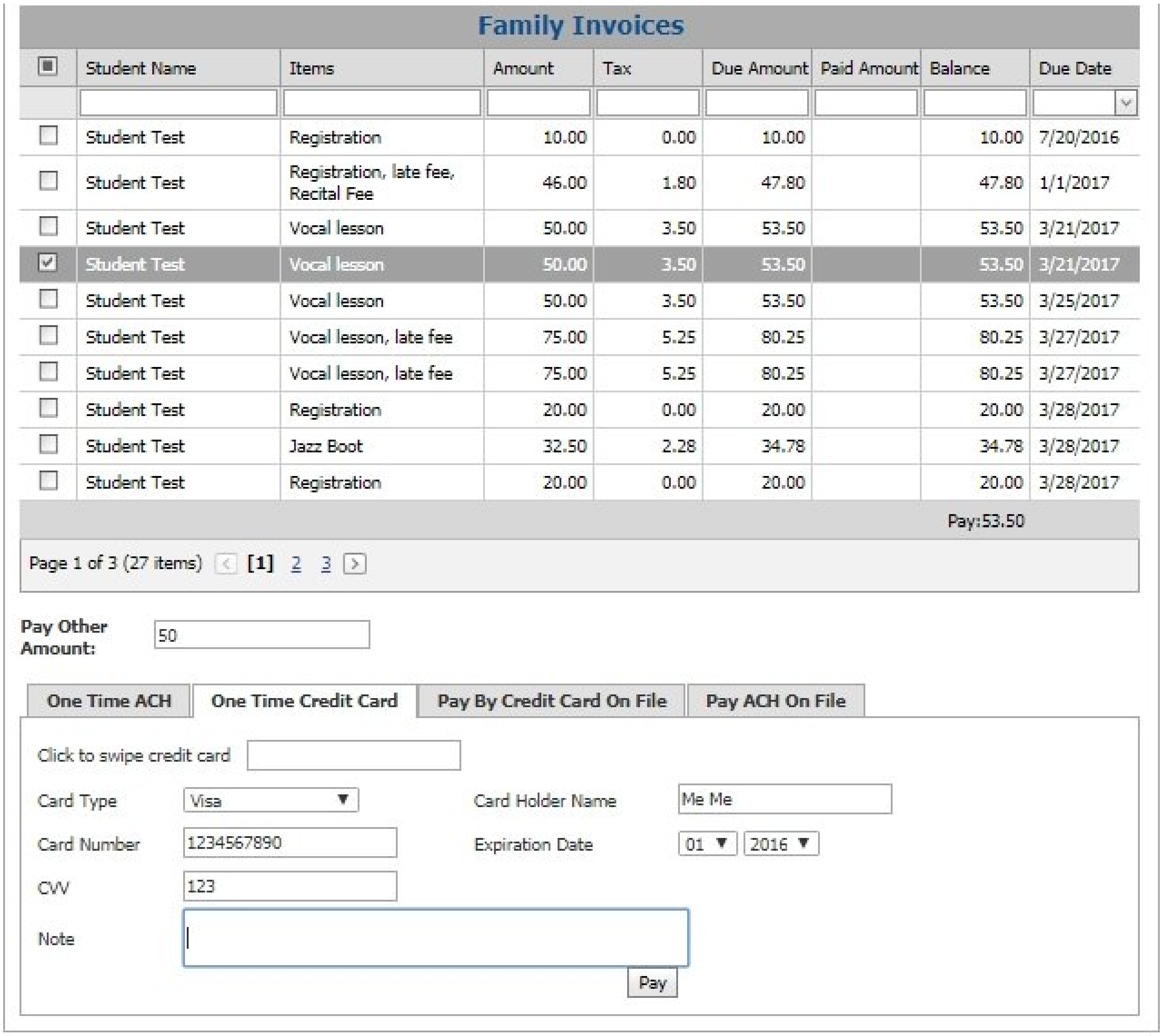
- Receive text messages from the school and Update the texting contact information.

Typically the In the Loop Membership is paid by the customer directly to CompuDance at the rate of $10 per the Calendar year.

Functions you can Turn on/off for your Parent Portal

You can allow your Customer to log in to the portal and make a partial payment to an invoice.

This allows the customer to select an invoice(s) and pay a different amount than the Balance Due for the selected invoices.



Family Invoices

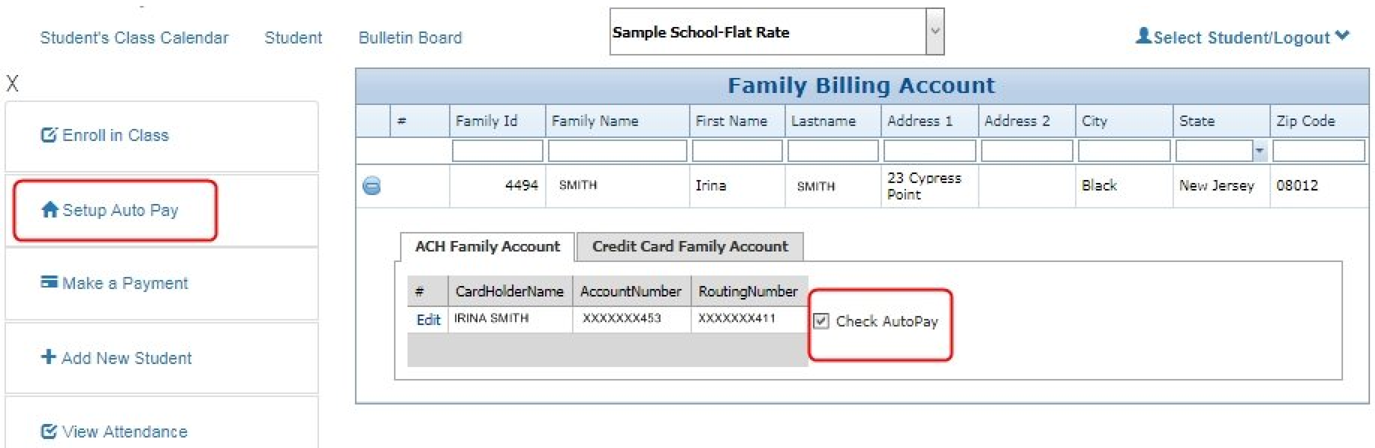
	Student Name	Items	Amount	Tax	Due Amount	Paid Amount	Balance	Due Date
☐	Student Test	Registration	10.00	0.00	10.00		10.00	7/20/2016
☐	Student Test	Registration, late fee, Recital Fee	46.00	1.80	47.80		47.80	1/1/2017
☐	Student Test	Vocal lesson	50.00	3.50	53.50		53.50	3/21/2017
☑	Student Test	Vocal lesson	50.00	3.50	53.50		53.50	3/21/2017
☐	Student Test	Vocal lesson	50.00	3.50	53.50		53.50	3/25/2017
☐	Student Test	Vocal lesson, late fee	75.00	5.25	80.25		80.25	3/27/2017
☐	Student Test	Vocal lesson, late fee	75.00	5.25	80.25		80.25	3/27/2017
☐	Student Test	Registration	20.00	0.00	20.00		20.00	3/28/2017
☐	Student Test	Jazz Boot	32.50	2.28	34.78		34.78	3/28/2017
☐	Student Test	Registration	20.00	0.00	20.00		20.00	3/28/2017
							Pay:53.50	

The screen above shows the customer can select an invoice and then enter a Pay Other Amount to not pay the balance in full for that invoice. If more than 1 invoice is selected. The payment will be applied in full to the oldest due and partial pay the other invoice if the amount is greater than the balance of the 1st invoice. For example: If the customer selects a Tuition invoice due 3/1/18 with a balance of 75.00 and an invoice for a costume balance due 1/18/18 with a balance of 25.00, then enters a Pay Other Amount of 80. The costume will be paid in full and the tuition will have a balance of 20.00

> To turn on Partial Payment for the Parent portal go to Admin-Gateway. Click Edit. Check off the box Show Parent Partial Pay Text in the 2nd column. Click Update to Save. <u>Click Here to see more about Gateway settings.</u>

You can allow the customer to turn on and off the autopay for the account on file.

This feature can allow the customer to prevent an auto payment from occurring for the saved account without contacting the school.
If you turn on this ability. The Customer can go to the Setup Auto Pay screen. Then they can check or uncheck the Check Autopay button.
Once the user clicks anywhere else the system will notify them of the Autopay being turned on or off. The school will also receive a message anytime a customer turns off the Autopay account.



To turn on this feature, go to Admin-Gateway. Click Edit. Check off the box Show Autocheck Parent in the 2nd column. Click Update to Save.[Click Here to see more about Gateway settings.]

FAQ

Student	Classes	Billing	Email
How to add a Prospect Student	How to Change a teacher/ schedule for a class	How to send Open Statements	How to Email only Active Participating Students
I want to print a list of my Active Students	Why is a student not on my attendance list?	How do I find a specific Check	How do I get images in my email body
How do I find the family for a student	Can I schedule a class twice for the same season	I want to change an invoice	Did my emails send?
How do I link siblings to a family	How do I cancel a Class?	I want a ledger for a specific family	How can I send a newsletter

How do I integrate my CompuDance and my website?

The system seems slow

This page is under construction
Gray lines are to be answered soon.

How do I find a specific check posted?

The easiest way to see all checks received and entered into CompuDance either directly to invoices or a deposit is to run the Sales Report!

Go to Billing – Sales Report
Enter the date range of the checks you wish to see.

> Hint: if you want to see all checks for a large period, enter a smaller date range to begin where you know a check was entered.

Filter for the student last name or payee to find that family. You could filter by Check number also.
You can change the original dates at the top to widen your search date range.

If you wish to email a statement the customer showing where the payments were applied, you may wish to use the Family Ledger Report. This will include a payment that went to a deposit first and then the payment applied to an invoice. It does not show the money still available on deposit.

Adding a Prospect Student

The prospect students can be entered using the Add New Student- if you have all of the information required in the form.Then change the status to Prospect until the student is ready to enroll. When you use Add New Student form, it will create a parent user login and the family link for the students entered.
Another way is to use the Add New Sibling button which will be the old way of adding students. You can enter the student, email, birthday if you have it. If you are going to enter in further contact information like a mailing address or guardian information set the student to Active. Enter the tab information for the prospect and then change the status to Prospect.
(By using the Add sibling button a parent user and a family link will not be created.)

You are able to email or run labels for your prospects and see a list of them.
To email, set the User group to Prospect Students or Prospect student parents if you entered information on the guardian tab.
To run mailing labels you can go to Report-Label Report-Student Address Labels. Select Prospect.

If a prospect becomes a student and you used the Add Sibling, you can just use Add New Student with the information from the registration. It will create the student again. If they were created originally using the Add Student- A family and a parent user were created and you need to go find the prospect in the Inactive student list edit them and change the status to Active.
It really depends on how much information you have when gathering a prospect’s information.

> A prospect is considered an Inactive Student by CompuDance and can be found in the Inactive Student list.

How do I find the family for a student

Online Student Register

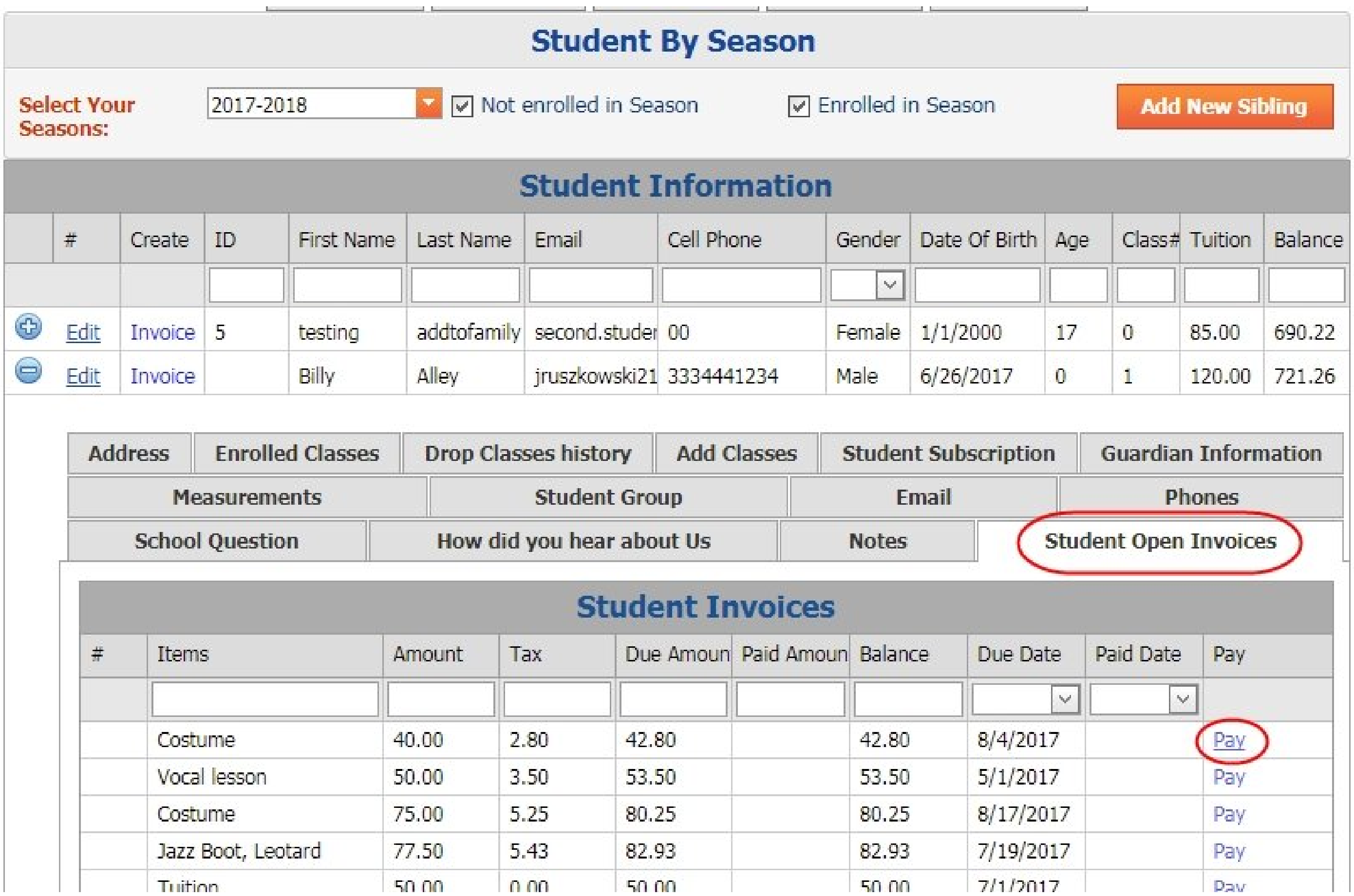
This report shows each student registered in the time period entered and includes that family the student is linked to. You can sort by Family to see if anyone is not attached to a family.

#	Family	First Name	Last Name	Age	class Name	Enrollment Date	Registrated Date
		s	s				
		Second student	second student	1	Beginner Ballet	03/23/2017	3/23/2017 1:39:00 PM
		Second student	second student	1	Hip Hop A	06/02/2017	3/24/2017 2:40:29 PM
		Second student	second student	1	Hip Hop Mon 6:00p	06/02/2017	3/24/2017 2:40:29 PM
		Second student	second student	1	Piano lesson 1/2 hour	03/23/2017	3/23/2017 1:14:31 PM
	Mom	Soft	Singer	5	Piano lesson 1/2 hour	05/11/2017	5/11/2017 12:00:00 AM
	p2	sibling	sibling	7	Hip Hop 9-12	06/01/2017	1/24/2017 4:32:21 PM

✻ This report is available to Every Studio. You do not have to offer online registration.

If the student has invoices

<u>To see the Family Invoices for a Student</u>
Go to the Student
If the Student has an open balance (Last Column shows a balance)
Click the plus to see the Student detail tabs
Go to the Student Open Invoices tab
Click the word pay on any of the invoice lines.
The system will bring you to the family invoices page.
If you are brought to a form, this student is not linked to a family.



You can also use the family ledger report to see which family a student is linked to. Use a large date range to include anytime the student may have received or paid an invoice. You may filter for the student. It will show which family the student is connected with.

> **!** **If you have trouble connecting a student to a family link**: Make sure the student has a guardian listed on the guardian information tab. If the Student Address and Guardian are missing, the student did not get created correctly. Please populate both of these tabs. Then go to the Family link page to add the student to the appropriate family.

How do I link Siblings

If you wish to link a currently existing student to an existing family

Make sure the student you are linking has an address and guardian information entered in the detail tabs.

- Go to Student- Click the plus to see the Detail tabs- Make sure there is an address in the address tab and 1 guardian in the guardian tab
- Go to Student-Family link page.
- Find the family you want to attach the student to.
- Click the plus to see the detail tabs
- The 1st tab- Family Sibling lists the guardians attached. To see the student attached, click the plus for the guardian.
- The 2nd tab- Add Family Sibling will allow you to attach any Student not currently attached to this family.
- Once you find the student, Check the box at the end of the line and click Link.

If the student was previously linked to a different family, that link is removed.

Why is a student not on my attendance list?

If you are either looking to enter attendance directly into the system or using a printed Manual Attendance list

If a student is missing from the list for a specific class
Check if student is enrolled in the class for that season
Go to Class-Enrolled Student tab or Student-Enrolled Classes

Make sure the student Enrollment date is correct.

Make sure the student was not previously enrolled but the end enrollment date is equal to or after your current enrollment date.
If so, make the enrollment date on the current student enrollment the day after the end enrollment that was previously entered.

Make sure the class is properly scheduled.

If these options do not help make the student appear, please contact us so we may assist you! Create a support ticket, click here

Can I schedule a class twice for the same season

A class is defined as a specific group of students that meet with a teacher.

You can have a class meet more than once a week.
Example: Ballet IV can meet on Tuesdays and Thursdays from 4 pm to 5 pm. The image below shows this class setup in the system

If you offer a type of class more than once for different students to enroll in, you would need to make a class for each group of students. These classes can have different students enrolled, or a student may opt to take both classes.
Example: Ballet I is offered on Monday and a separate Ballet I class is offered on Wednesday. The image below shows these classes setup in the system

	#	Name	Code	Type	Age	Color	S#	Availa	StartTime	EndTime	M	Tu	W	Th	F	SA	S
	Clear																
	Edit	Ballet IV	2 tmes a week	Ballet	All Ages		0	14	4:00 PM	5:00 PM		✓		✓			
	Edit	Beginner Ballet	1A	Ballet	All Ages		6	14	4:00 PM	5:00 PM	✓						
	Edit	Beginner Ballet	1B	Ballet	All Ages		0	20	4:00 PM	5:00 PM			✓				

System is Running Slow

If your computer seems to be running slow, you may wish to clear your cache.

In the top right corner of **Google Chrome**, under the red X to close the window, you will see three dots or lines in a vertical order.
Click it.
You will see a menu display.
Select More Tools
Select Clear Browsing data
A Box will appear.
Make sure the top read Obliterate the following items from: the beginning of time
At least have the box for Cached images and files checked. (You may select more if you wish.)

In **FireFox**, you can clear your cache by clicking the top right 3 lines under the X to close the window.
Select Options
On the left side menu, select Advanced
The second section: Cached Web Content and there is a button to the right “Clear Now”. Click it.

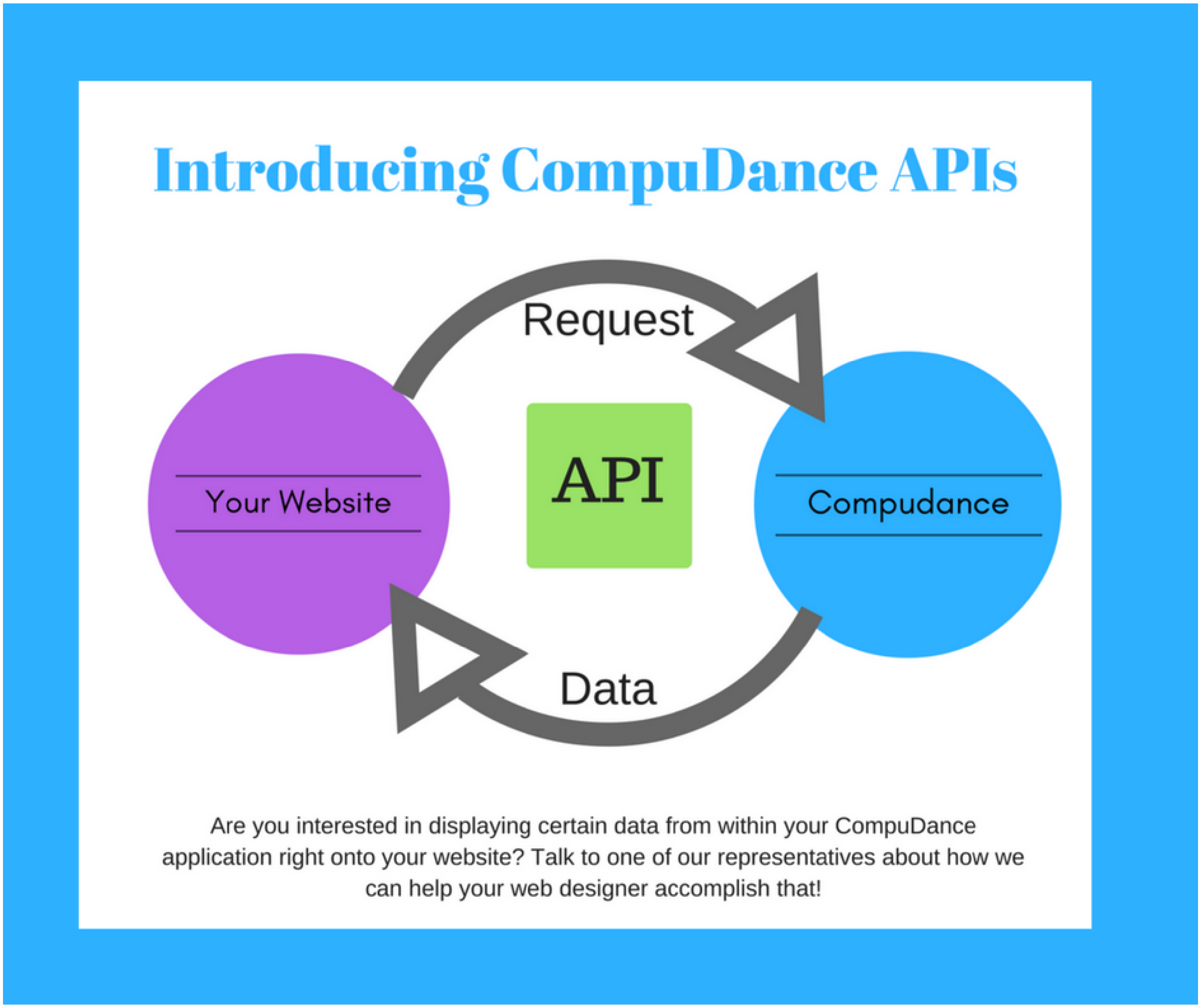
* Cached images and files are saved images and date that your computer uses when you visit websites frequently instead of re-downloading them to display. They are temporary files and will not harm anything on your computer. By clearing this out, it will free up space on your computer and may help some processes in our system work faster.

! This process will log you out of any websites you are logged into at the time.
Do not use if you are running a process like batch invoices until it is complete.

CompuDance API

API

An application program interface (API) is a set of routines, protocols, and tools for building software/web applications.
Basically, an API specifies how software components should interact.
It allows information from one database be displayed and interact with a different website.

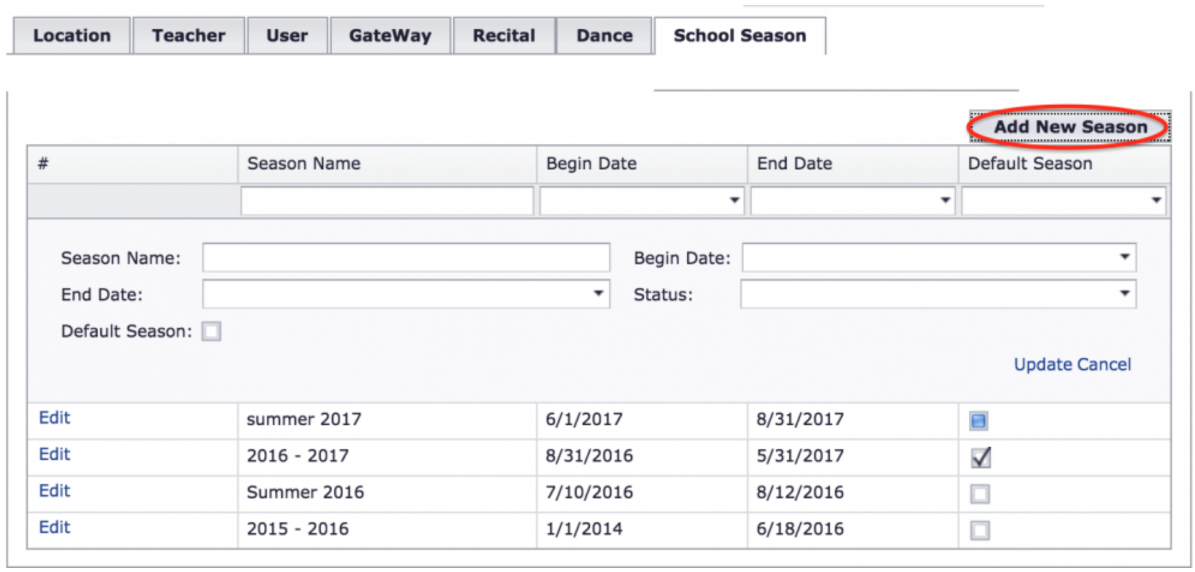


Steps for Starting a New Season

When beginning a new registration period (or season), there are just a few steps to get the system ready:

1.Create a New Season

Go to ADMIN -> SEASON TAB



- Click Add New Season Button
- Name of season – This is determine by the studio
- Begin Date – first day of classes for the season
- End Date – Last day of classes for the season
- Status Options
  Active – indicates season is Open for enrollment by studio and parents if offered.
  Do not show – season classes can be enrolled by studio only, not parents. (use when setting up the season)
  Inactive – previous season or a season that is no longer in use.

- Default – when checked, the season name, start and end dates will be auto-populated in other parts of the system. For example, on the class screens.

Typically the **Default Season** is the current season being worked in. If you are creating your class offerings for a future season you may wish to mark that season as the default so that it will automatically assume this season and dates when scheduling. You can then switch it back to the current season when complete.

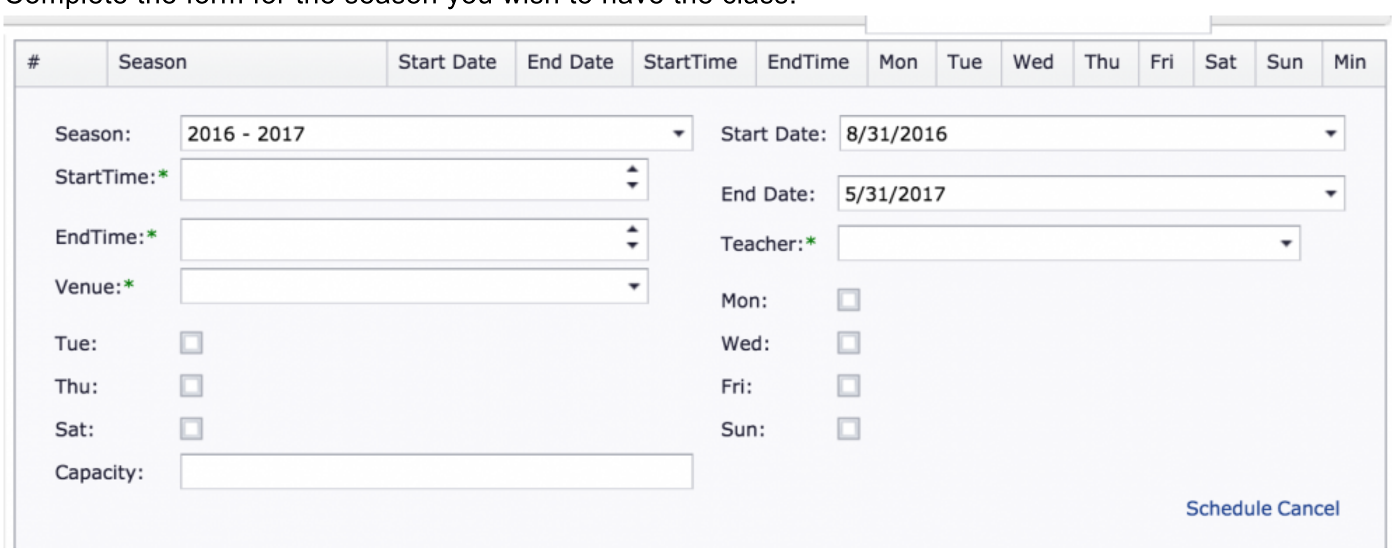
! Start and End dates can not cross into another season's dates.

2. Add Classes to the season

Once the new season is created, you have the option of adding existing classes as well as creating brand new offerings.

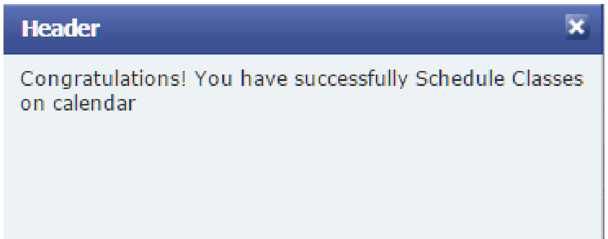
To add a class that was previously offered.

Go to Classes
Change the Season to the season the class currently exists.
Find the Class.
Click the plus to see the detail tabs
Go to the Class Manage Schedule tab
If the season you are adding is not listed – Click Schedule New Class
Complete the form for the season you wish to have the class.

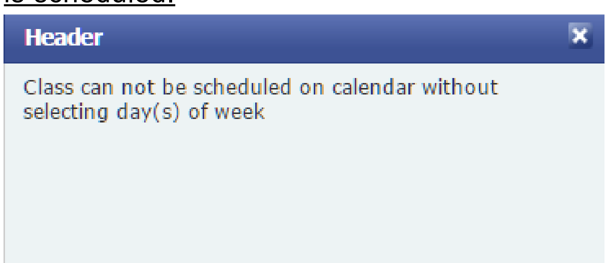


p(banner tip). Note: it will automatically populate the season, start and end dates for your default season.

If you select days of the week, the class will be scheduled on the calendar for every occurrence of that day in the time period entered.
Click Schedule.
You will see a message that the class has been scheduled if a Day of the week was marked.



If you did not select a day of the week, you will see the following message.
The class will still accept enrollment of students. (If class status is Active- Studio or parent can enroll when season is active. If class status is Do Not Show, only the studio will be able to enroll students.)
You will not have the class scheduled and will not be able to take attendance or have tuition calculate until it is scheduled.



To Add a New Class click here

Once all of your classes are entered in the new season, you can open online enrollment by editing the Admin-School Season to have a Status of active.

3.Invoicing

New Families/Students: You can have an invoice auto create when a family is registering for the first time.
Income Category-Pay at Signup

You can decide if you wish to Pre-Invoice for the new season.
Some will batch invoice all Active Students for a Registration fee or Class Deposit for the new season to be enrolled.
Contact us if you want to discuss the options or if you want us to turn off the payment scheduler for Auto-pay for these invoices.

4.Announce Open Enrollment

If you are using the online parent portal, you can email all of your active students who have an account to login and let them know when enrollment is opening. If you go to Mail- Express Message and select Users for All Parent Login.
Here is a sample letter that you can use as a template. You would need to know your login link if you want to embed it into the letter, or you can direct them to your webpage with the link.
****
Hello.

We are opening our enrollment to have online registration on (enter date/time)

Since you are already in our system, please login by clicking here. Your login is your email address that received this email.

You can use the Forgot password option to reset your password if needed.

Once you login and agree to the terms and conditions, you may do any of the following.
To enroll in Classes, click the Enroll in Class menu option.
You may save/update an auto-pay account, view/pay invoices at any time.
You may upload a picture of your student in the Student Image option.
You may change your password or account information in the My setting page.
To change the student you are currently working on Click Select Student on top right.

The studio will be posting in the Bulletin Board section.
To view this section, you must pay the $10 CompuDance membership fee.

The membership fee will also give you:

- Access to all areas and benefits for a full calendar year.
- Your students will also be entered into a $500 tuition scholarship lottery which will be drawn on September 15th.
- You can also receive discounts for NewDawnCreations (party favors, bows etc.) and LulaRoe clothing.

2017 In the Loop Pricing

compudance

Keep your families in the Loop

Studios utilizing our Member Program can reduce monthly expenses and save up to thousands of dollars a year! Use the extra money to grow your enrollment while keeping your parents in the loop!

Studio Size	# of Members	Studio Fee	YEARLY SAVINGS
100 - 750 students	50% of active student count signed up as Members	$25.00 monthly	100 - 150 up to $504 151 - 250 up to $804 251 - 500 up to $1,164 501 - 750 up to $1,644
100 - 750 students	75% of active student count signed up as Members	FREE	100 - 150 up to $804 151 - 250 up to $1,104 251 - 500 up to $1,464 501 - 750 up to $1,944
Under 100 students or over 750 students contact us for pricing			

Membership is $10.00 per year per Member. Paid upon parent login directly to CompuDance.

This membership will provide the studio with:

- **Parents updating their contact information without forms or administration time**
- **Parents can input their credit card/ ACH information directly into your PaySafe vault which reduces your liability for this information 100%!**
- **Parents can get their answers without disrupting your staff**
- **E-Bulletin Board in Parent Portal for message, picture and video upload!**
- **Daily Email alerts sent to studio with vital dashboard information**
- **Multiple savings and discounts from various vendors servicing the dance industry**
- **Unlimited text messaging to parents without a cost per text**
- **FREE CompuDance Software**

This membership will give the parents/students the ability to:

- **Entry into a raffle to win $500 Dance Tuition Scholarship**
- **Access to E-Bulletin Board messages, pictures and videos from studio**
- **Discounts from vendors**
- **Enroll in classes anytime & anywhere**
- **View their billing history: Invoices & Payments**
- **Make a payment securely online without transaction fees anytime**
- **Save their account information directly into the processor's vault 100% secure!**
- **Check their student's schedules and Attendance**
- **Register for text messaging from the school so they never miss an important communication**

2017 Software Pricing

Feature	Included		Feature	Included
Scheduling	yes		Credit Card / ACH integration	yes
Email Marketing	yes		Auto-payments	yes
Attendance and Class Management	yes		Online Registration	yes
Student Management	yes		Prospect File and Marketing	yes
Billing and Accounts Receivable	yes		Unlimited Phone, Email, Chat Support	yes
Recital Management	yes		Document Management and Storage	available
Costume Management w/ Auto-sizing	yes		Multiple Locations	available
Teacher Portal	yes		**Online Bill Pay**	Available with parent membership
Nightly Backups	yes		**Internal Messages, Video and Picture upload to Parents**	Available with parent membership
Storage of up to 250 Inactive Students	yes		**Exclusive Offers and Discounts from multiple vendors**	Available with parent membership
Start with a **FREE trial!!**			• # Students • 1-100 $45 • 101-150 $67 • 151-250 $92 • 251-500 $122 • 501-1000 $162	**Want to know how to use the software for FREE? Ask us about Parent Memberships.**

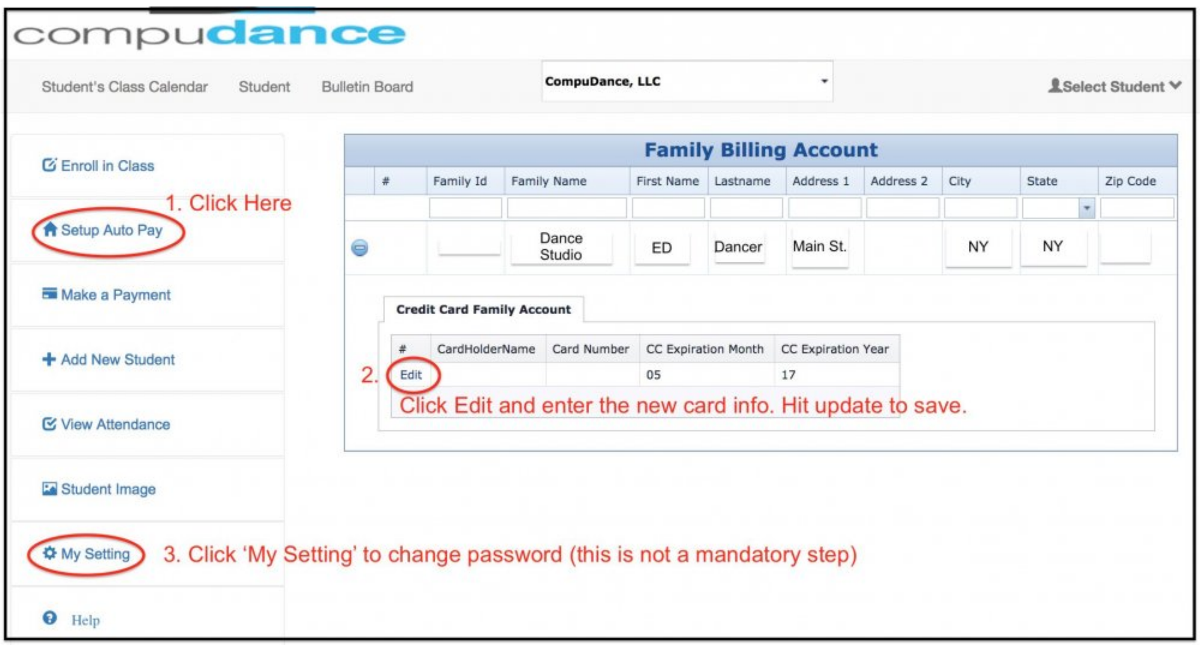
Payment Portal Link for Studios

Dear Client,

Please find the instructions for your payment portal:
1. go to www.compudance.com
2. click the LOGIN LINK – it is found on upper right side of the screen
3. Use the login and password that we sent you:

Login – FOUND IN EMAIL
Password – FOUND IN EMAIL
(this is a default, you can change to whatever you like under My Settings)

Once logged in, you will enter your credit card information. From the left-side menu select **Setup AutoPay**. Below is a screen print for further help.



3/7/2018 – Filters for Text Messaging

System Update Release March 7, 2018

SMS Text Messaging

You are now able to filter on Class, Group and Users for text messaging.
The text feature will now default to only send messages to Active Enrolled Students / User Accounts.