REGWERKS

registration. simplified.

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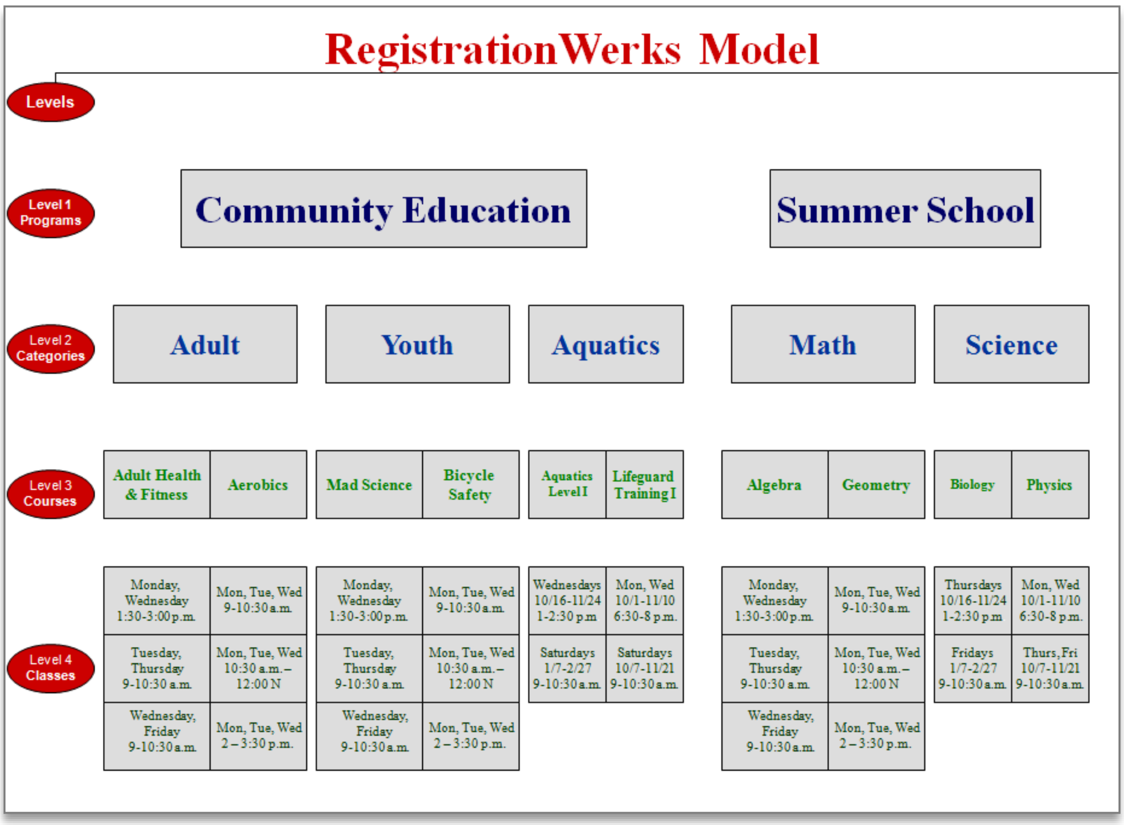
Introduction

The RegistrationWerks (RegWerks) software has four levels: **Program**, **Category**, **Course** and **Class**. Users are encouraged to reuse the first three levels with each of their seasons/semesters/registration periods. On a seasonal or annual basis, users add the specific details for each class session at the **Class** level (i.e. the class date, time and actual registrations).

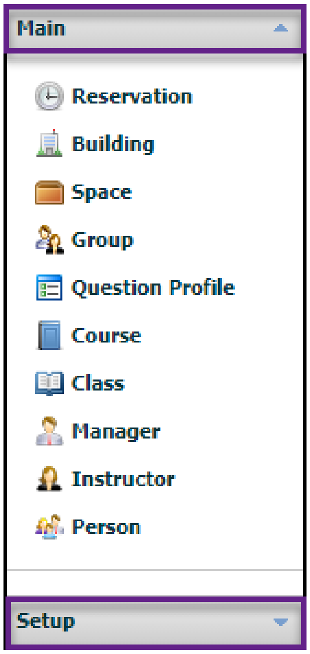
In the example below, the **Programs** (**Community Education** and **Summer School**) contain multiple **Categories**, the **Categories** contain multiple **Courses**, and the **Courses** contain multiple **Classes** with unique dates and times.



Getting Started

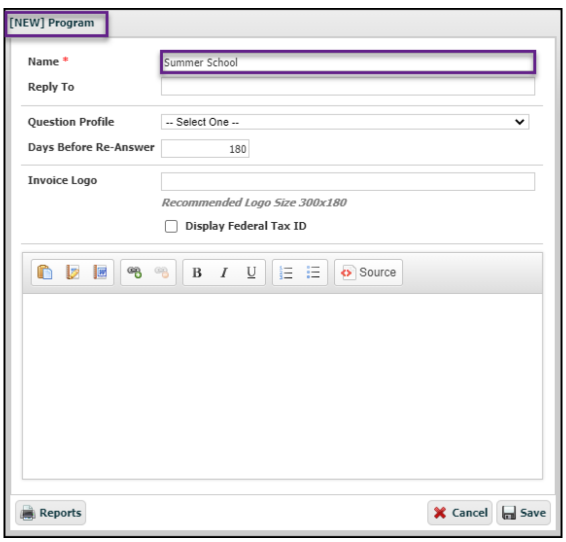
When users first arrive at the RegWerks site, they will login by entering a unique username and password to access the system. Usernames and passwords are provided by the RegWerks team when the system is first built. These fields are <u>not</u> case sensitive. Once the first group of users has been given access to their RegWerks system, the client organization manages all new users and user permissions.

Menus



The menu bar on the left-hand side of the screen is used to navigate between the two menus in RegWerks—**Main** and **Setup**—and their various menu options. The **Main** menu is displayed by default when users first log in. The **Setup** menu is accessed by clicking the **Setup** button in the lower left corner of the screen.

Adding an Item



Users may add as many items as needed to each menu option. To add an item, click on the item in **Main** or **Setup**. For all items except **Class** and **Person**, click the Add Record button in the upper left toolbar to create a new item. Enter the required information and click **Save.** In this example, “Summer School” is being added as a new Program to the **Program** menu option.

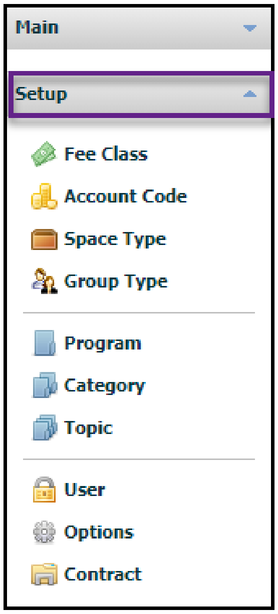
Editing an Item

To edit an item, double-click on it in the current list. The item will open in a new window where users may make necessary changes. Select either **Save** to keep the edits or **Cancel** to discard changes.

Deleting an Item

It is ***highly recommended*** that users do not delete items from the item list. The items under one menu option are often tied to items under another. If it is necessary to delete an item, highlight the item in the list and then click the Delete Selected button. A prompt will appear to confirm the deletion. Select the **OK** button to complete the deletion process.

Setup Menu

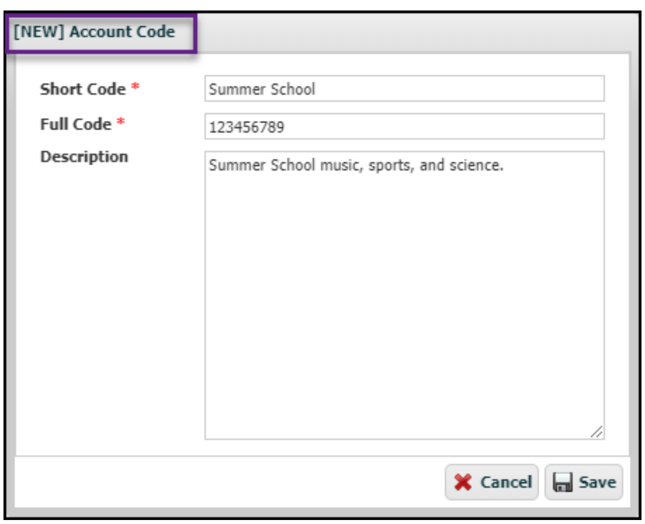


The **Setup** menu contains navigation links to the menu options which build a functioning RegWerks system. Each link will be described in greater detail below.

Fee Class

Fee Class is used to differentiate rates for space usage. Users may add as many Fee Classes as needed.

Account Code



An **Account Code** is used to track transactions in the RevTrak Web Store. Each registration transaction in RegWerks must have an account code assigned to it so that the transaction revenue is recorded accurately in the RegWerks and RevTrak financial reports.

Account Codes created in the RegWerks software will be automatically created in the RevTrak software the first time they are used in a transaction. If an Account Code does not already exist in the RevTrak software, inform your RevTrak team of this addition to ensure that the Account Code is attached to the correct deposit account. If an Account Code already exists in the RevTrak system, users must manually add it into the RegWerks system.

To create an Account Code, create a **Short Code,** which can be an internal title for easy recognition on reports, and a **Full Code**, which must to match any corresponding code in RevTrak exactly. The **Description** is optional and clarifies the uses to which the code is being assigned.

Space Type

Space Type categorizes spaces by type. For example, Rooms 102, 103, and 104 would be separate spaces, with each having the space type of **Classroom**. In another example, the school might have a gymnasium with two spaces: Court 1 and Court 2. Both would have the space type of **Gymnasium**.

Space types are then used to narrow searches for rooms or reports. These space types will populate the **Space Type** field on the **Space** list. Actual spaces are added in the **Space** menu option that is located under the **Main** menu.

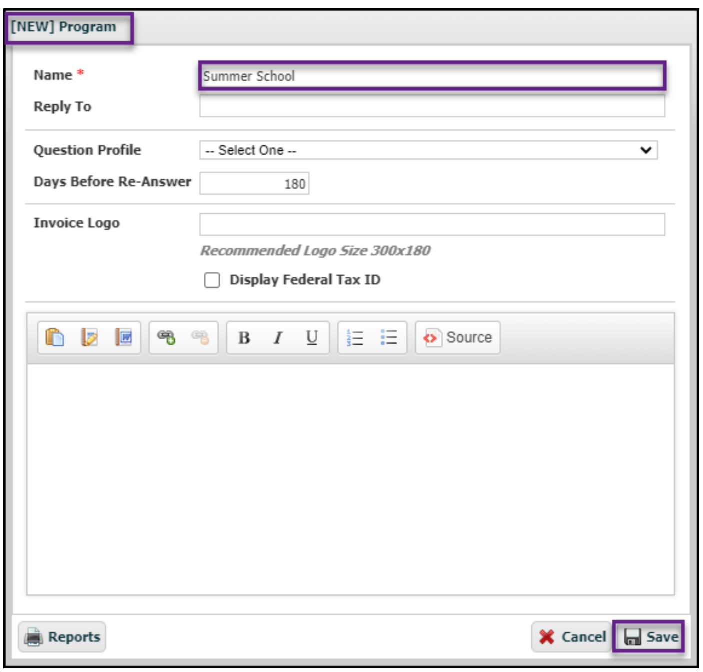
Group Type

Much like a space type, a **Group Type** creates categories for groups (athletic team, childcare providers, etc.) Group types allow users to sort or search groups by type.

These group types will populate the **Group Type** drop-down field on the **Group** list. Actual groups are added in the **Group** menu option that is located under the **Main** menu.

Program

A **Program** is the highest and broadest level of the software's overall structure. Programs are used to group categories, courses, and classes. Users must first create Programs to populate the drop-down menus that are required to create the Categories, Courses, and Classes.



Name: Assign a Name to each new Program.

Reply To: The **Reply To** email address will show on the emails and receipts that are sent when someone registers for a class under that Program. If this field is left blank, the site-wide **Reply To** email address (added at the Options screen in the **Options** button) will automatically be used.

Question Profile: Users may choose to attach a **Question Profile** to a Program. When registrations are completed for a Class under this Program, RegWerks stores these answers and auto-populates them on the registrant's next registration.

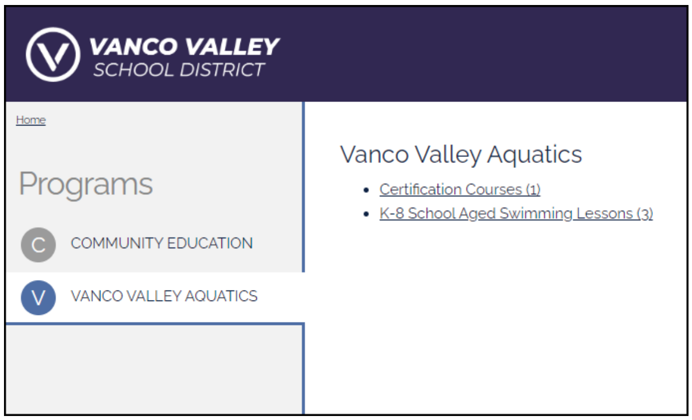
Days Before Re-Answer: Users can specify the number of days that RegWerks will keep a registrant's answer by entering them in the **Days Before Re-Answer** field. This feature only applies to answers provided for this program.

Invoice Logo: Users may also add an **Invoice Logo** to a particular Program so invoices display a logo which is different from those on invoices for other Programs. By default, the logo displayed on invoices is the site-wide logo (added in **Options**) if no logo is stored at the **Program** level.

Display Federal Tax ID: The **Federal Tax ID** may be displayed on reports and invoices by checking the corresponding checkbox.

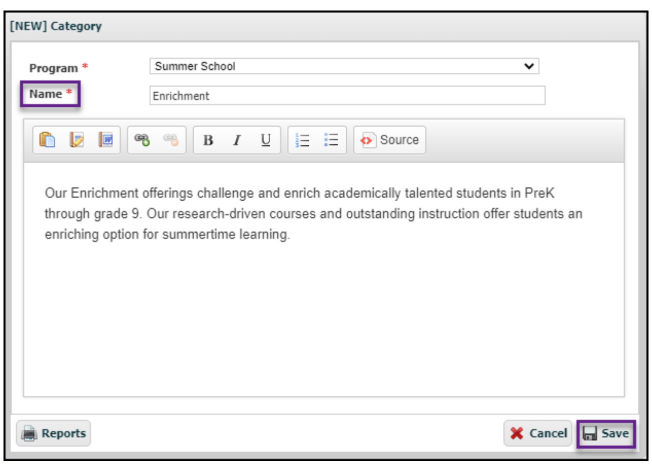
Description: Finally, the **Description** field can be used to give a more detailed explanation of the Program. The text in this field will display on the RevTrak Web Store.

In the example below, **Vanco Valley Aquatics** is a Program that contains two Categories: Certification Courses; and K-8 School Aged Swimming Lessons. Each Category displays the number of Courses attached in parentheses. When a user clicks on the Category, they are taken to the **Course List** page, which also shows the individual Classes that are available under each Course.



Category

A **Category** is the second level of the software's overall structure. Categories are used to group Courses and Classes. For example, a Summer School Program might offer several different Math Courses (Algebra, Trigonometry, Geometric Structures), each with multiple Classes that vary according to the times and dates that they are offered. The Category is a broad representation of all the Courses and Classes that pertain to it.

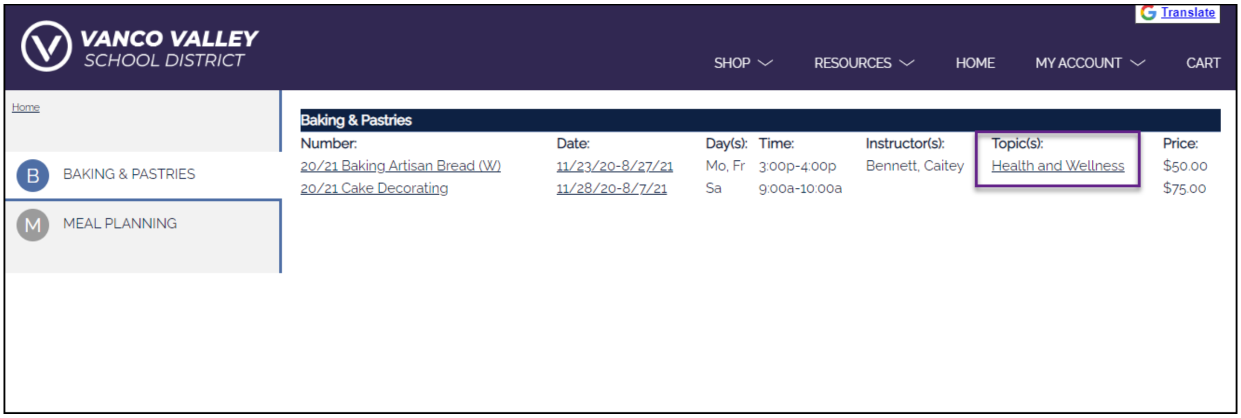


To build out a Program, users must first create the Program and then, the Categories. Category-specific information populates the required drop-down menus needed to create the Courses and Classes that will fall under each category. When a Category is added, users select the Program that it falls under and give the Category a **Name**, clicking **Save** once complete. In this example, the Category, Enrichment, is created within the Summer School Program.

Add a description of the Category to display additional information above the list of classes on the Web Store.

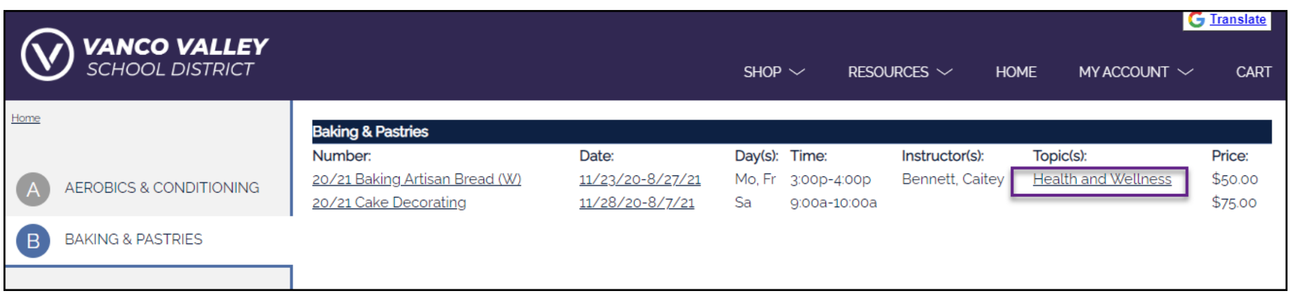
Topic

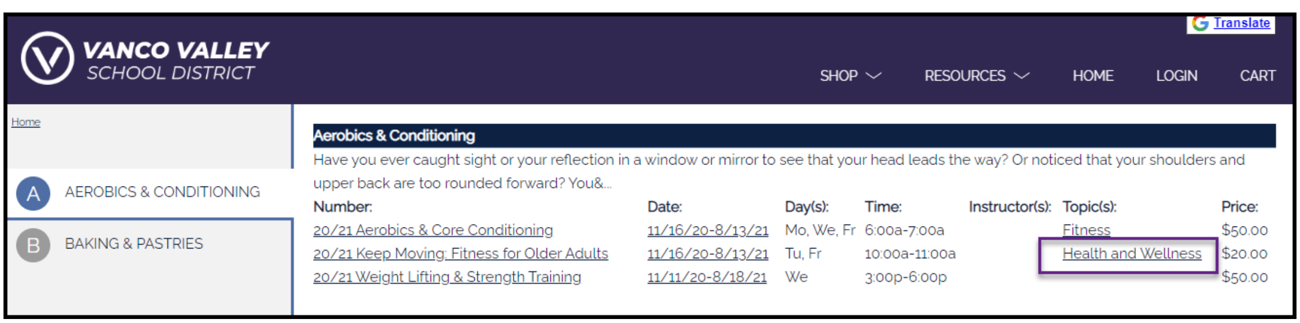
A **Topic** is a link that cross-references different Courses on the website. Topics are initially displayed on the **Class List** page under the Category in the Web Store. In the example shown below, the **Class List** for the Food & Nutrition category is in view. Only the Courses that fall under the Food & Nutrition Category are initially shown in the list.



Notice that Health & Wellness is used as a topic for one of the classes displayed above. If the customer is interested in seeing all the classes that have anything to do with Health & Wellness, they have the option to click on the Health & Wellness link. The page will then change to include only the Courses with Classes featuring Health and Wellness as a topic, regardless of what Category each falls under.

Notice in the images below that a **Class List** displays classes using the Health & Wellness topic from all available Courses.





Each course can have up to two Topics, but they are not required. To display topics on the Web Store, navigate to the **Setup** menu. Click on **Options**, check the **Topic** checkbox under **Column Setup**. **Save** once complete.

To create a Topic, go to **Topic** under the **Setup** menu. Click the green **Add Record** button, and enter Topic name. **Save** when finished. To attach a Topic to a Course, double-click into the Course and select the appropriate Topic from one of the **Topic** drop-down menus.

User

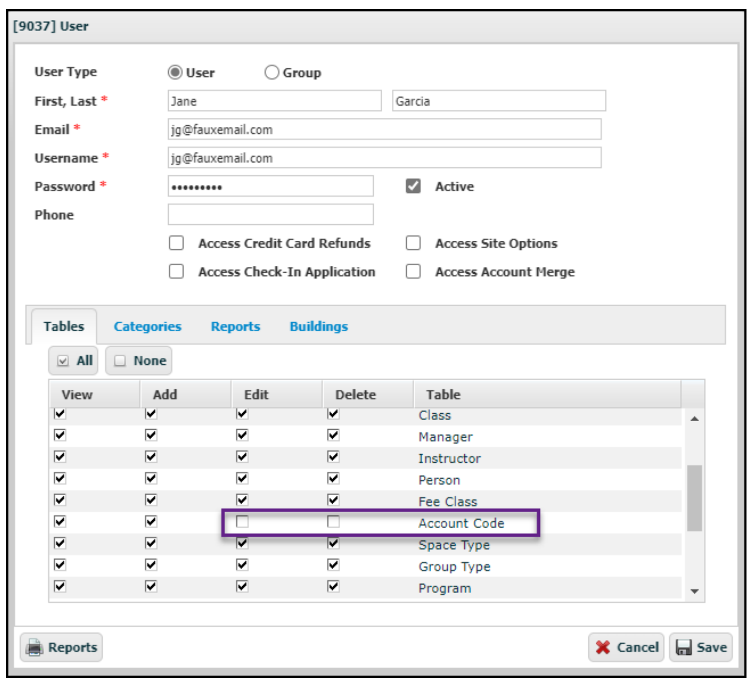
Once the first group of users have been given access to RegWerks, the client organization manages all new users and user permissions. Users and user permissions are managed in the **User** menu option under the Setup Menu. Double-click on an existing User to edit that individual's User permissions. To create a new User, click on User in Setup Menu, then click the **Add Record** button. Assign the new record either as an individual **User** or as a **Group**. For new Users, enter first and last name, email address, username, and password. For new Groups, enter the group name. By default, each new user has full permissions to view, edit, and print everything within the RegWerks software, except Categories. Categories are manually assigned to each individual User.

There are options to limit a user's or group's access to **Tables**, **Categories**, **Reports**, and **Buildings** by unchecking the corresponding checkboxes. Permissions allowing users to give **ePayment Refunds**, access the website **Options** page, access the **Check-In Application**, and access **Account Merge** may be limited as well. Users may also change User status between **Active** and **Inactive**. **All** or **None** buttons make large-scale changes to User and Group permissions by selecting All checkboxes, or by selecting no checkboxes.

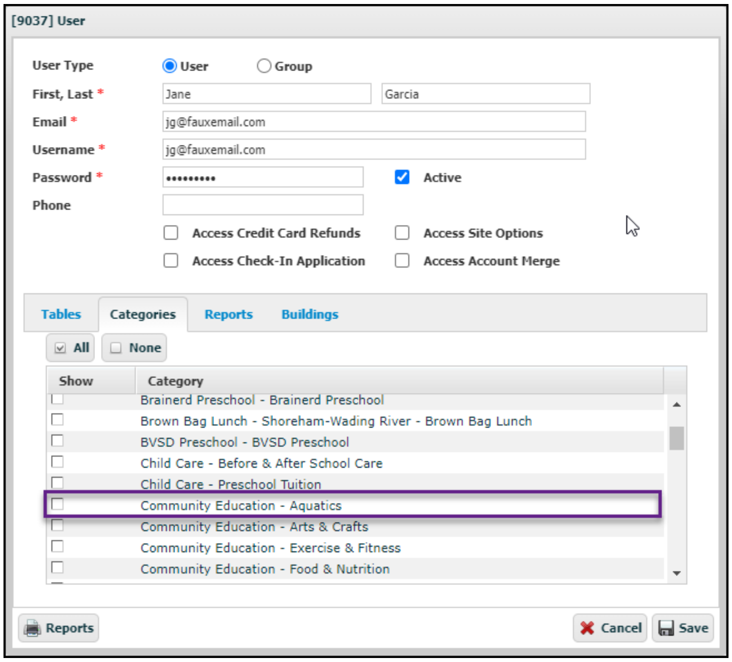
Tables

Tables refer to the menu options that appear on the **Main** and **Setup** menus. To remove a user's rights to **View**, **Add**, **Edit**, or **Delete** items within the system, uncheck the corresponding checkboxes under the **Tables** tab. In the example below, Jane's ability to **Edit** or **Delete** Account Codes has been revoked, therefore preventing Jane from changing Account Codes themselves or from changing Account Codes on a Class. If Jane attempts to make changes to any Account Codes, the **Save** button or **Account Code** dropdown menu in the Class will be deactivated (grayed out) and no changes can be saved.

Additionally, when a user does not have permission to view certain information in the software, a message will be displayed telling them that they do not have permission.



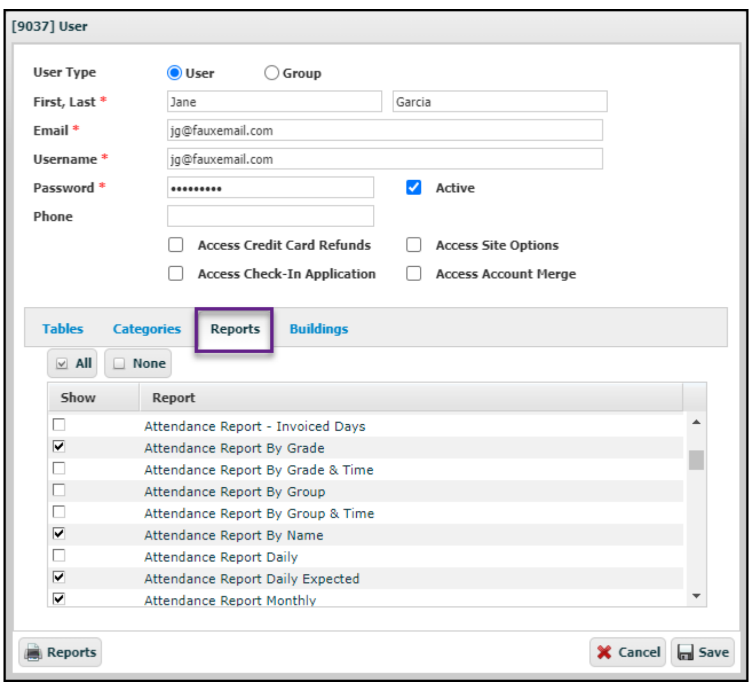
Categories



As new Categories are created from the **Setup** menu, names of the new **Categories** automatically appear on the Categories tab on the **User** window. However, users must proactively give themselves and colleagues access to new Categories once created. Select the Categories for each individual user, as needed.

In the example, the new Aquatics Category is unchecked for this user. When they go to the **Category** page, they will be unable to see the Category along with any Courses or Classes attached to it.

Reports

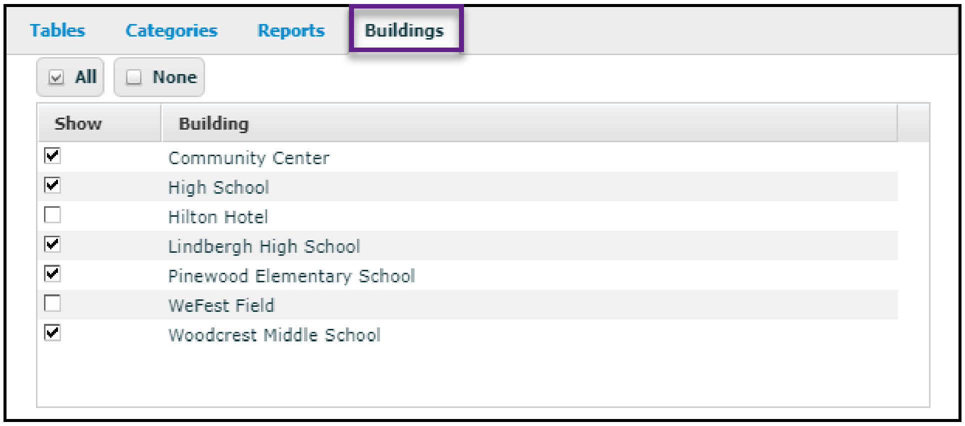


There are over 100 reports available within RegWerks. The **Reports** tab allows users to grant or deny user access to view and print individual reports.

Some users may need to have access to rosters and attendance sheets but none of the financial reports. Uncheck the checkboxes for the corresponding reports to deny access for individual users to ensure that these reports will not display for that user.

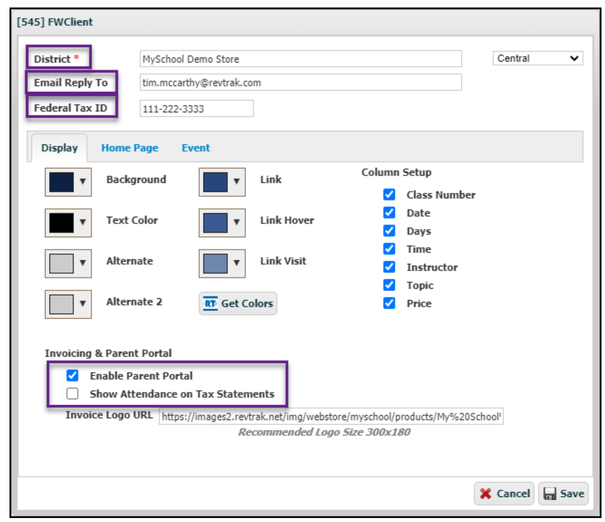
For example, Jane has only been given access to a few **Attendance** reports. When she looks at the available reports, only those that she has access to will be listed.

Buildings



The **Buildings** tab is populated by the buildings created in the **Main** menu under the **Building** menu option. This tab allows users to grant or deny user access to specific buildings within the organization.

Options



The **Options** screen defines the basic look and feel of RegWerks on the RevTrak Web Store and contains many Global Settings. To access these settings, click on **Options** under the **Setup** menu.

District: Enter the district name in the **District** field as it should appear on printed receipts and invoices (see the district name highlighted in yellow on the example receipt below). The text entered here will also appear in the **From** field of automatic emails being sent from the software.

Email Reply To: The email address entered in the **Email Reply To** field will be used as the **Reply To** field on automatic emails (i.e. invoices) being sent from the software.

Federal Tax ID: Enter the district's Federal Tax ID number in the **Federal Tax ID** field. The number entered will appear on printed receipts and invoices (see the Tax ID # highlighted in yellow on the Example Receipt below).

MySchool Demo Store
TAX ID #:
Invoice #: 138917-7310490
Due Date: 6/15/2017

Bill To:
John Scaduto
123 Main St.
Bloomington MN, 55437

Charges for Kim Doe: Weekly Child Care 2017-18 04/24/2017 to 06/30/2017

Description	Amount
Balance Forward	$73.00
AM (2 Day/Week)	$12.00
Multi-Student with AM & PM Discount	$-4.00
PM (2 Day/Week)	$15.00
Total Due	**$96.00**

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Display Tab

The **Display** tab contains options for customizing the **Color Settings**, **Column Setup**, and **Invoicing & Parent Portal**.

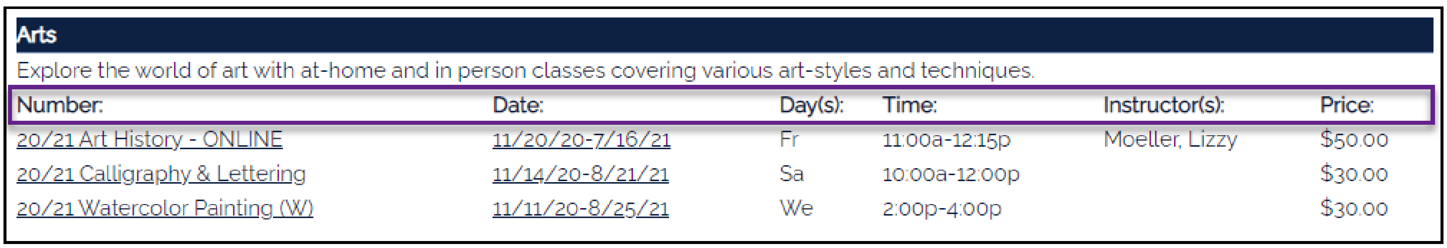
Enable Parent Portal: Check the **Enable Parent Portal** checkbox to enable the **Parent Portal** on the Web Store under RevTrak's **My Account** page. This allows parents to log in and access the Parent Portal section of their Web Store account, including the ability to make payments towards balances, access tax statements and update their card on file.

Show Attendance on Tax Statements: Check the **Show Attendance on Tax Statements** box to include dates of attendance on the tax statements.

Column Setup

The checkboxes in **Column Setup** correspond to the **Column Headings** and **Details** that describe each class in a Course.

In this area, select which of the columns will display on the **Course List** page. If all seven of the options are selected, text wrapping could occur, which could cause the layout to be confusing. It is highly recommended that only the most important columns are selected with a maximum of only five options checked. Below is an example of Column Setup as it appears in the Web Store for families:



Users may choose to either show or hide the **Class Number**, **Date**, **Days**, **Time**, **Instructor**, **Topic**, or **Price** individually. If checked, the heading and details will show. If unchecked, the heading and details will be hidden.

Invoice Logo Field

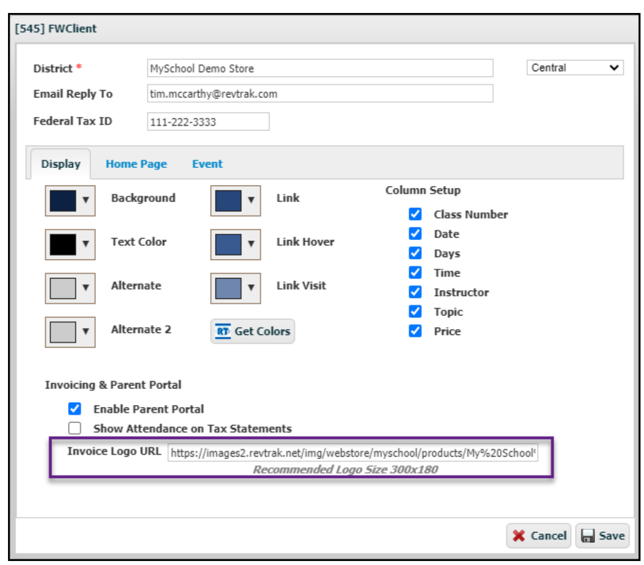
To include a logo on printed receipts and invoices, enter the URL and path to the institution's logo. The image must be web-based (JPEG, TIFF, PNG, GIF, BMP), and an image size of 300x180 pixels is recommended.

To find the URL to an image on the organization's web site, navigate to the desired image.

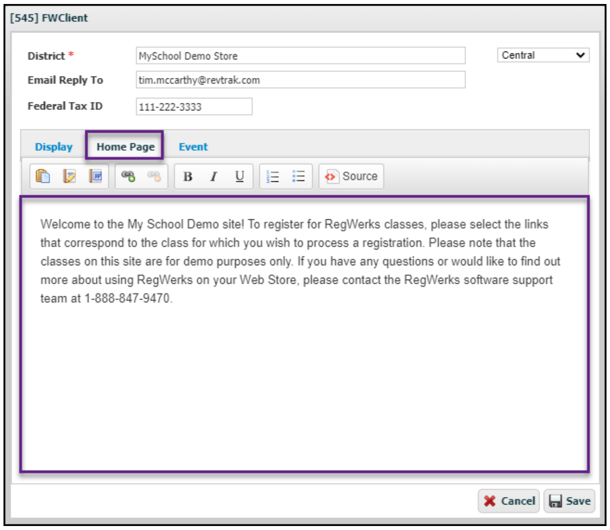
In **Safari**, right-click on the image, and select **Copy Image Address**. Paste the URL into the **Invoice Logo** field and click **Save.**

In **Chrome**, right click, select **Copy Image URL**, paste the URL into the **Invoice Logo** field, and click **Save**.

The logo will show in the top left corner of invoices and printed receipts.

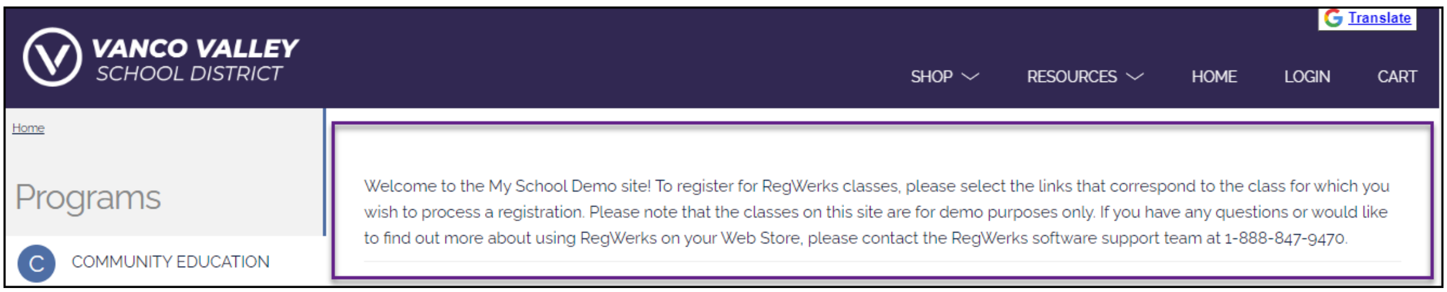


Home Page Tab

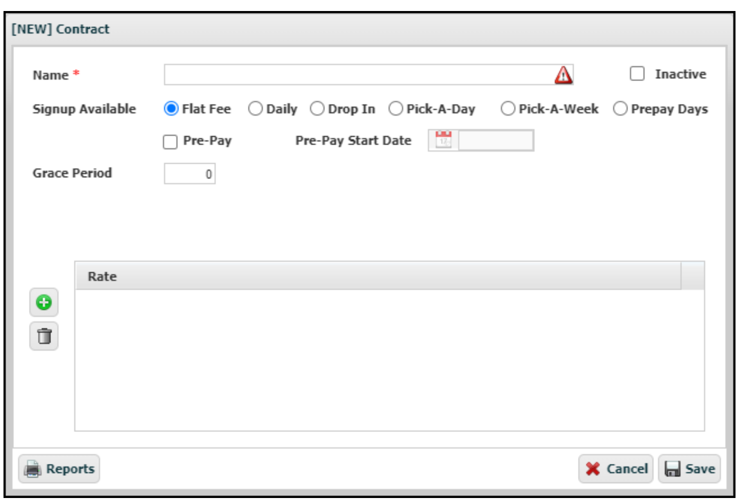


The **Home Page** tab displays additional information in the **Program List** page for all Programs in the Web Store. Basic HTML formatting tags can be used to format the text in a variety of ways. Enter the preferred text in the **Home Page** field, and click the **Save** button.

The text shown in the example above creates the HTML formatting for the **Program List** page. Below is an example of how this same text displays on the in the Web Store's **Home Page,** where customers make their selections**.**



Contracts

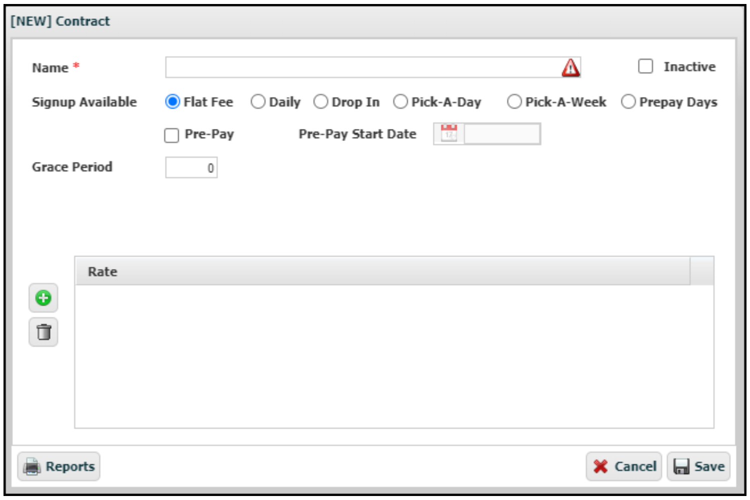


Contracts allow users to create recurring pricing structures which are assigned to individual classes. A contract may be assigned to more than one class. Once a contract is assigned to a class, recurring payments can be charged. Also, recurring charges can be batch processed to those accounts that have given authorization to charge their credit cards on a weekly or monthly basis.

Contracts are made up of **Rates**. Rates enable different billing structures (i.e. **Standard Rate, Employee Rate, Free/Reduced Rate**). This allows users to charge different fees to participants enrolled in the same class.

Segments are assigned to rates. Segments represent different segments of a day: **AM**, **PM,** and **Other**. A student can sign up for one AM, one PM, or one Other segment at a rate of their choosing.

Add New Contract



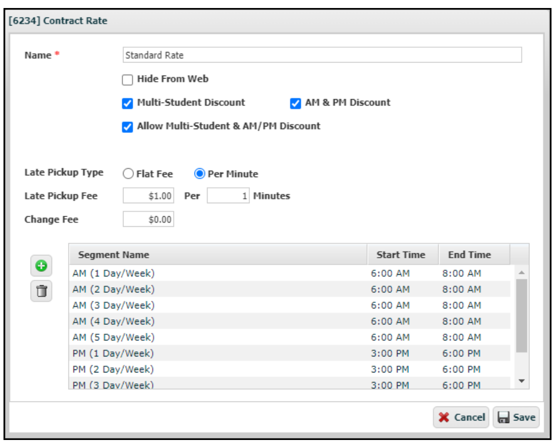
To create a new Contract for a Class, click on **Contract** and then select the green **Add Record** button on the upper left corner of the screen.

Name: The Name is the name that displays when assigning a contract from the drop-down menu in a contract class.

Signup Available: The **Signup Available** radio buttons determine the type of care families select for their children during signup. Each contract must be assigned either the **Flat Fee** tuition, **Daily** tuition, **Drop in** tuition, **Pick-A-Day** tuition, or **Pick-A-Week** tuition. The difference between these options is based upon how contract billing is calculated.

Pre-Pay and Pre-Pay Start Date: The **Pre-Pay** checkbox and **Prepay Start Date** should be filled in if the payment is to be made prior to the first month of attendance. If payments will be made after the billing period has occurred, this checkbox should remain unchecked. If the contract requires a pre-payment, the pre-pay start date for the payment period must be entered. The pre-pay start date is typically the first day of classes or the billing cycle.

Rates



Contracts may have multiple **Rates** assigned to them. To create a Rate, click on the **Plus Sign** to the left of the Rate list. To delete a rate, highlight the rate by clicking on the name in the table and then click the **Trash Can** button. Once the deletion is confirmed, the rate will be removed.

Name: Users may customize the **Name** of the rate that parents see during registration in the **Name** field. Some examples of rate names are **Standard Rate**, **Employee Rate**, **Free and Reduced Lunch**, and **Scholarship**.

Hide from Web: By using the **Hide From Web** checkbox, users have the option to hide specific rates from the web so that the general public will not see them during registration. Hidden rates are only available to select during the admin **Walk-in Registration** process.

Multi-Student Discount: If the **Multi-Student Discount** box is checked, users may set up a special Rate for additional students within the same family in each Segment. The first student will be charged the full price while each additional student will be charged the reduced Rate. The special pricing is created within each Segment in the Rate.

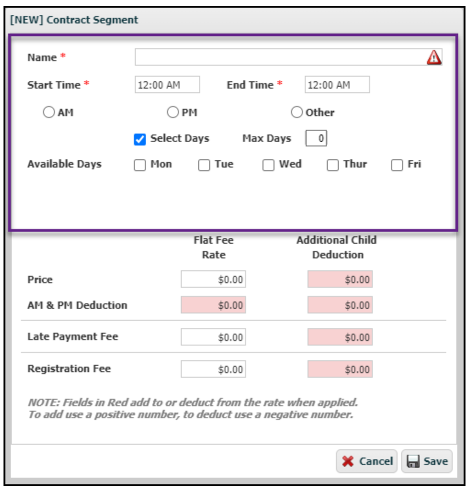
AM & PM Discount: When the **AM & PM Discount** box is checked, users may assign a discount to students who sign up for an AM and PM Segment within the same Rate.

Allow Multi-Student & AM/PM Discount: When the **Allow Multi-Student & AM/PM Discount** box is checked, discounting options may be stacked. By checking this box, both discounted rates are applied to the registration. Users must select all three options in order to use the **Multi-Student** and **AM/PM Discoun**t.

Late Pickup Fee: The **Late Pickup Fee** field charges an additional fee for each day that a child is picked up late from class. Users may opt to charge either a **Flat Fee** or **Per Minute** fee. Attendance can then be taken with the late pickup times noted, and the additional fees are automatically calculated based on this late fee at the time that charges are calculated for the Class.

Change Fee: To apply an extra charge each time a customer changes their Segment within a Contract, add that fee to the **Change Fee** field. For example, a change in segment within a contract occurs when a parent originally signs up for a 6 PM pickup and then changes to a 6:30 PM pickup. This change qualifies them for a Segment Change Fee.

Segments

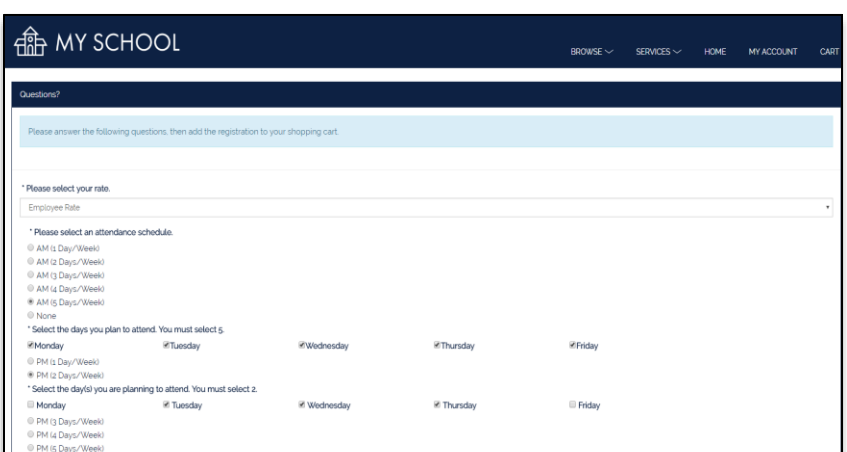


Once the Rates for the Contract have been created, individual **Segments** define the various pricing structures for differing attendance days and times. To create a new Segment, click on the **Plus Sign** to the left of the Segment list, and the **NEW Contract Segment** window will open. Each Contract may have multiple Segments to reflect the various pricing options.

Name: Each Segment must have a **Name.** The Segment Name appears on the Web Store. Parents select their Segments while registering for a Class.

Start Time and End Time: The **Start Time** and **End Time** must be defined for each Segment. Each Segment may also belong to one of three time categories indicated by **AM**, **PM**, and **Other**. Parents may only choose one Segment in each time category for each Class (i.e. one AM segment, one PM segment).

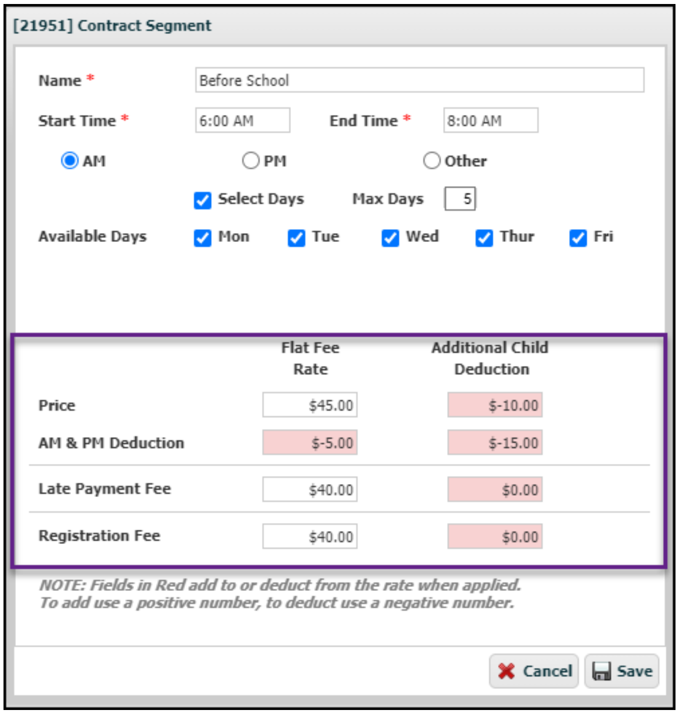
Select Days: When selecting the **Select Days** checkbox, two additional settings appear: **Max Days** and **Available Days**. **Max Days** establishes the maximum number of days parents may select for attendance in a given week. The **Available Days** setting provides a row of checkboxes that allow parents to choose which days their student will attend. When creating Segments with **Max Days** limits, users must check the **Available Days** of the week on which the class will be offered. These days are the same days from which parents will choose during the registration process. This allows each parent to choose the days on which their child will attend class.



At left is an image reflecting how selections in RegWerks Contracts display for families in the Web Store. Parents select the rate using the **Rate** drop-down menu. Once the Rate is chosen, Contract segments appear as an attendance schedule. In the example below, the AM Segment selection of 5 Days requires the caregiver to check the five days of attendance, while the PM Segment selection of 2 Days requires the caregiver to check which two days will be attended.

Flat Fee Signup

Flat Fee Signup applies the following Rate information: When using the **Flat Fee** option, parents/guardians may only register for the Class once. Payments are made following invoicing using the **Parent Portal** or via batch processing. Charges are based on a Flat Fee tuition rate during the invoicing process, regardless of attendance.



Price (Flat Rate): This is the Price charged for the time frame of attendance (typically week or month) on this Segment.

Price (Additional Child Deduction): The **Additional Child Deduction Price** modifies the **Flat Rate Price** if the student is not the first person in the family to register for a class using this Contract. In the example, if the student qualifies for the **Additional Child Deduction**, they would get $-10.00 deducted from the $45.00 daily (**Flat Rate**) price for a total rate of $35.00.

AM & PM Deduction (Flat Rate): This is the amount that is added to or subtracted from the charges if the student is registered for an AM and PM segment on this contract. In the example, if the student qualifies for the **AM & PM Deduction**, they would get $-5.00 deducted from the $45.00 daily (**Flat Rate**) price for a total rate of $40.00.

AM & PM Deduction (Additional Child Deduction): This is the amount that is added to or subtracted from the charges if the student is registered for an AM and PM segment on this contract ***and*** is not the first person in the family to register for a class using this contract. In the example above, if the student qualifies for both the **AM & PM Deduction** *and* is an additional child, the family would get $-15.00 deducted from the $45.00 daily (**Flat Rate**) price for a total rate of $30.00.

Late Payment Fee (Flat Rate): The **Late Payment Fee** is the amount charged to a registration when an invoice is not paid before the invoice **Due Date** (which is set during the invoicing process). The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed.

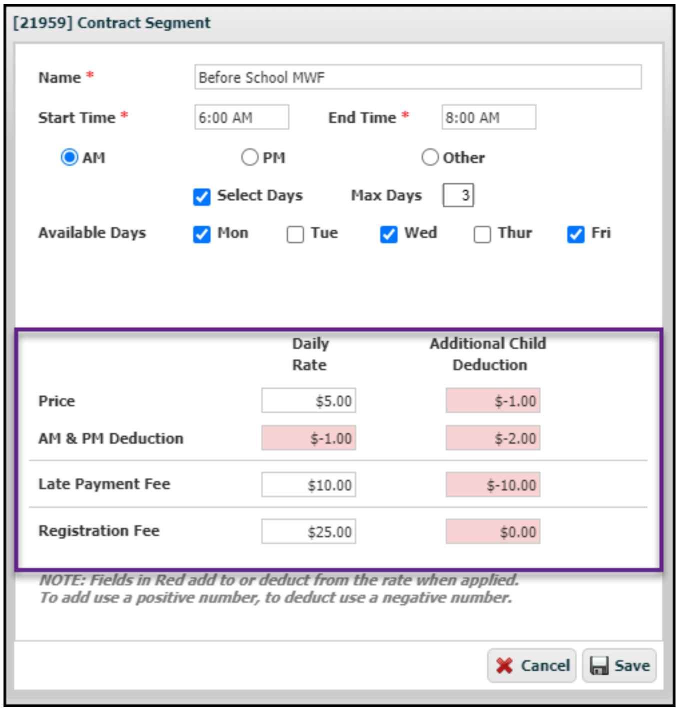
Late Payment Fee (Additional Child Deduction): This is the amount charged to a registration when an invoice is not paid before the invoice **Due Date** and the student is not the first person in the family to register for a class using this contract. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed. In the example above, if the family made payment past the due date, they would be charged $40 for the first child, and $40 for each additional child.

Registration Fee (Flat Rate): This is the amount charged at the time of registration.

Registration Fee (Additional Child Deduction): The Registration Fee (Additional Child Deduction) defines the amount paid for an additional child's registration fee. If this field is set at $0, registration fees will only apply to the first child's registration, regardless of how many additional children in the family may register for the class. However, if additional family members should be required to pay a registration fee, then this field must have a dollar amount to calculate each **Additional Child's Registration Fee**.

Daily Signup

Daily Signup applies the following Rate information: With the Daily option, the parent only registers for the class once and makes payments following invoicing using the **Parent Portal** or via batch processing. Charges are based on a daily tuition Rate during the invoicing process.



Price (Daily Rate): This is the price charged for a single day of attendance on this Segment.

Price (Additional Child Deduction): The **Additional Child Deduction Price** modifies the **Daily Rate Price** if the student is not the first person in the family to register for a class using this contract. In the example at left, if the student qualifies for the **Additional Child Deduction**, the family would get $-1.00 deducted from the $5.00 **Daily Rate Price** for a total rate of $4.00.

AM & PM Deduction (Daily Rate): This is the amount that is added to or subtracted from the charges if the student is registered for an AM and PM segment on this contract. In the example, if the student qualifies for the **AM & PM Deduction**, the family would get $-1.00 deducted from the $5.00 **Daily Rate Price** for a total rate of $4.00.

AM & PM Deduction (Additional Child Deduction): This is the amount that is added to or subtracted from the charges if the student is registered for an AM and PM segment on this contract ***and*** is not the first person in the family to register for a class using this contract. In the example above, if the student qualifies for both the **AM & PM Deduction *and*** is an additional child, the family will get $-3.00 deducted from the $5.00 **Daily Rate Price** for a total rate of $2.00.

Late Payment Fee (Daily Rate): The **Late Payment Fee** is the amount charged to a registration when an invoice is not paid before the invoice **Due Date** (which is set during the invoicing process). The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed.

Late Payment Fee (Additional Child Deduction): This is the amount charged to a registration when an invoice is not paid before the invoice **Due Date** and the student is not the first person in the family to register for a class using this contract. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed. In the example above, if the family made payment past the due date, they would be charged $10 for the first child. The $10 late fee for each additional child (which is calculated automatically by the web store) would be offset by a $-10 reduction. The family would therefore only be charged $10 in late fees.

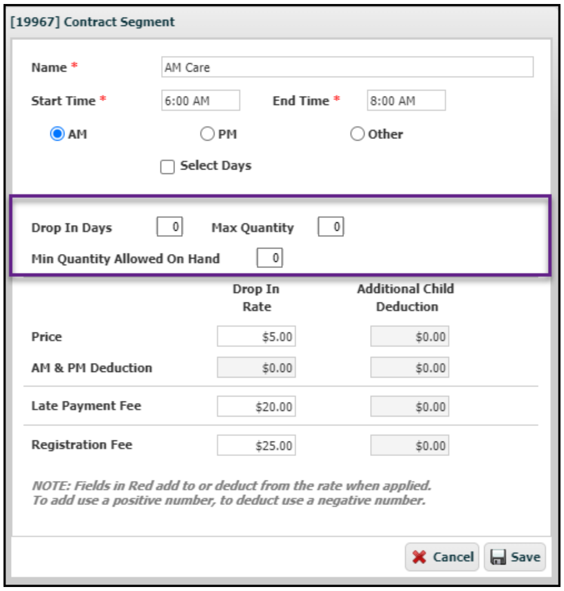
Registration Fee (Daily Rate): This is the amount charged at the time of registration.

Registration Fee (Additional Child Deduction): The **Registration Fee (Additional Child Deduction)** defines the amount paid for an additional child's registration fee. If this field is set at $0, registration fees will only apply to the first child's registration, regardless of how many additional children in the family may register for the class. However, if additional family members should be required to pay a registration fee, then this field must have a dollar amount to calculate each **Additional Child's Registration Fee**.

Drop In Signup

Drop In Signup applies the following Rate information: With the **Drop In** option, customers purchase a certain number of attendances in advance and purchase additional quantities as needed. The students will not have any recurring daily or monthly charges. Invoicing can be performed for **Drop In** registrations. If a class using a **Drop In** contract is invoiced, only the students who have used more drop in days than they have purchased will be charged.

The Drop In Signup has three additional fields:



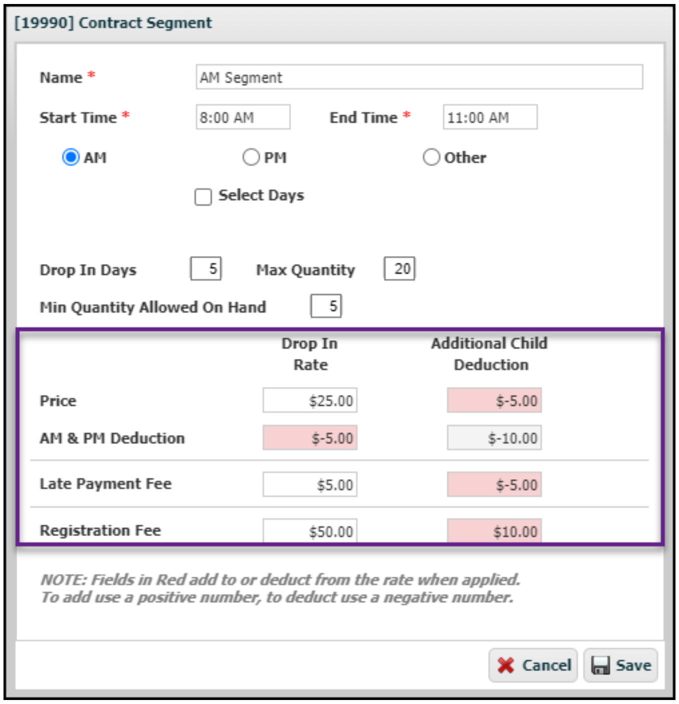
Drop In Days: This is the number of Drop In units to be purchased at a time.

Max Quantity: This is the maximum number of Drop In Day units that can be purchased at a time.

Min Quantity Allowed on Hand: This is the minimum number of drop in days that a parent is required to have at any given time.

In the figure below, the "Drop In Days" are 3 and the "Max Quantity" is 10. This means the parent can purchase a set of three **Drop in** attendances at a time with a maximum of ten sets.

Drop in Attendance Breakdown	
3 Days (3 Drop in Days * Quantity of 1)	18 Days (3 Drop in Days * Quantity of 6)
6 Days (3 Drop in Days * Quantity of 2)	21 Days (3 Drop in Days * Quantity of 7)
9 Days (3 Drop in Days * Quantity of 3)	24 Days (3 Drop in Days * Quantity of 8)
12 Days (3 Drop in Days * Quantity of 4)	27 Days (3 Drop in Days * Quantity of 9)
15 Days (3 Drop in Days * Quantity of 5)	30 Days (3 Drop in Days * Quantity of 10)



Price (Drop In Rate): This is the price charged for a single day of attendance on this segment.

Price (Additional Child Deduction): The **Additional Child Deduction Price** modifies the **Daily Rate Price** if the student is not the first person in the family to register for a class using this contract. In the example at left, if the student qualifies for the **Additional Child Deduction**, the family would get $-5.00 deducted from the $25.00 **Daily Rate Price** for a total rate of $20.00.

AM & PM Deduction (Drop In Rate): This is the amount that is added to or subtracted from the charges if the student is registered for an AM and PM segment on this contract. In the example, if the student qualifies for the **AM & PM Deduction**, they would get $-5.00 deducted from the $25.00 **Drop In Price** for a total rate of $20.00.

AM & PM Deduction (Additional Child Deduction): This is the amount that is added to or subtracted from the charges if the student is registered for an AM and PM segment on this contract ***and*** is not the first person in the family to register for a class using this contract. In the example above, if the student qualifies for both the **AM & PM Deduction *and*** is an additional child, they will get $-10.00 deducted from the $25.00 **Drop In Price** for a total rate of $15.00.

Late Payment Fee (Drop In Rate): The **Late Payment Fee** is the amount charged to a registration when an invoice is not paid before the invoice **Due Date**, which is set during the invoicing process. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed.

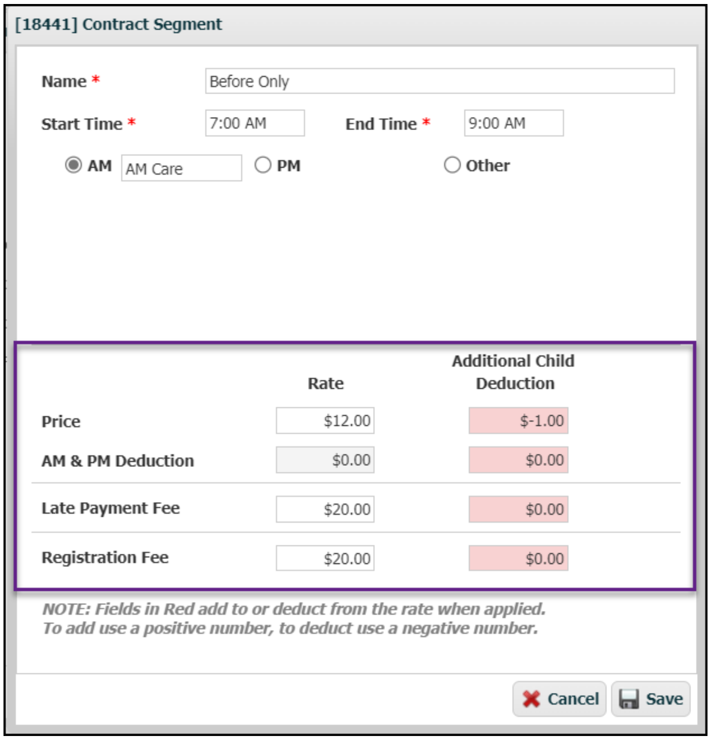
Late Payment Fee (Additional Child Deduction): This is the amount charged to a registration when an invoice is not paid before the invoice **Due Date** and the student is not the first person in the family to register for a class using this contract. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed. In the example above, if the family made payment past the due date, they would be charged $5 for the first child. The $5 late fee for each additional child (which is calculated automatically by the web store) would be offset by a $-5 reduction. The family would therefore only be charged $5 in late fees.

Registration Fee (Drop In Rate): This is the amount charged at the time of registration.

Registration Fee (Additional Child Deduction): The Registration Fee (Additional Child Deduction) defines the amount paid for an additional child's registration fee. If this field is set at $0, registration fees will only apply to the first child's registration, regardless of how many additional children in the family may register for the class. However, if additional family members should be required to pay a registration fee, then this field must have a dollar amount to calculate each **Additional Child's Registration Fee**.

Pick-A-Day Signup

Pick-A-Day Signup applies the following Rate information: With the **Pick-A-Day** option, the parent/guardian only registers for the class once. Parents/Guardians then have the option to pick the specific days they would like their children to attend. Charges are based on the number of days they picked during an invoicing period.



Price (Pick-A-Day Rate): This is the price charged for a single day of attendance on this segment.

Price (Additional Child Deduction): The **Additional Child Deduction Price** modifies the **Pick-A-Day Price** if the student is not the first person in the family to register for a class using this contract. In the example, if the student qualifies for the **Additional Child Deduction**, they would get $-1.00 deducted from the $12.00 **Pick-A-Day Price** for a total rate of $11.00.

AM & PM Deduction (Pick-A-Day Rate): Given the nature of Pick-A-Day Signup, it is not recommended that users assign AM/PM Deductions.

AM & PM Deduction (Additional Child Deduction): Given the nature of Pick-A-Day Signup, it is not recommended that users assign AM/PM Deductions.

Late Payment Fee (Pick-A-Day Rate): The **Late Payment Fee is** the amount charged to a registration when an invoice is not paid before the invoice **Due Date**, which is set during the invoicing process. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed.

Late Payment Fee (Additional Child Deduction): This is the amount charged to a registration when an invoice is not paid before the invoice **Due Date** and the student is not the first person in the family to register for a class using this contract. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed. In the example above, if the family made payment past the due date, they would be charged $20 for the first child and $20 for each additional child.

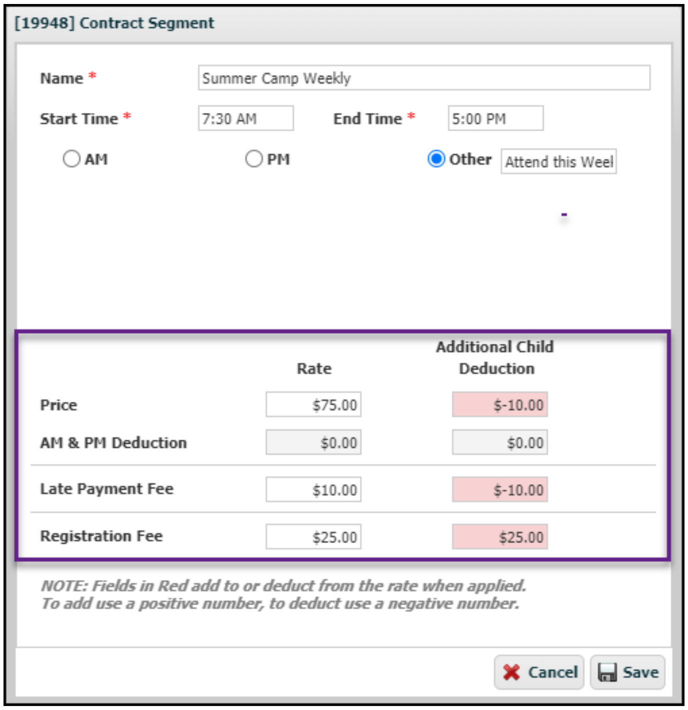
Registration Fee (Pick-A-Day Rate): This is the amount charged at the time of registration.

Registration Fee (Additional Child Deduction): The Registration Fee (Additional Child Deduction) defines the amount paid for an additional child's registration fee. If this field is set at $0, registration fees will only apply to the first child's registration, regardless of how many additional children in the family may register for the class. However, if additional family members should be required to pay a registration fee, then this field must have a dollar amount to calculate each **Additional Child's Registration Fee**.

Pick-A-Week Signup

Pick-A-Week Signup applies the following Rate information: With the **Pick-A-Week** option, the parent/guardian only registers for the class once. Parents/Guardians/Caregivers then have the option to pick the specific weeks they would like their children to attend. Charges are based on the number of weeks they picked during an invoicing period.

Price (Pick-A-Week Rate): This is the price charged for a single week of attendance on this segment.



Price (Additional Child Deduction): The **Additional Child Deduction Price** modifies the **Pick-A-Week Price** if the student is not the first person in the family to register for a class using this contract. In the example at left, if the student qualifies for the **Additional Child Deduction**, they would get $-10.00 deducted from the $75.00 **Pick-A-Week Price** for a total rate of $65.00.

AM & PM Deduction (Pick-A-Week Rate): Given the nature of Pick-A-Day Signup, it is not recommended that users assign AM/PM Deductions.

AM & PM Deduction (Additional Child Deduction): Given the nature of Pick-A-Day Signup, it is not recommended that users assign AM/PM Deductions.

Late Payment Fee (Pick-A-Week Rate): The **Late Payment Fee** is the amount charged to a registration when an invoice is not paid before the invoice **Due Date**, which is set during the invoicing process. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed.

Late Payment Fee (Additional Child Deduction): This is the amount charged to a registration when an invoice is not paid before the invoice **Due Date** and the student is not the first person in the family to register for a class using this contract. The late fee is applied automatically when a **Balance Due** exists on an invoice and the invoice **Due Date** has passed. In the example above, if the family made payment past the due date, they would be charged $10 for the first child. The $10 late fee for each additional child (which is calculated automatically by the web store) would be offset by a $-10 reduction. The family would therefore only be charged $10 in late fees.

Registration Fee (Pick-A-Week Rate): This is the amount charged at the time of registration.

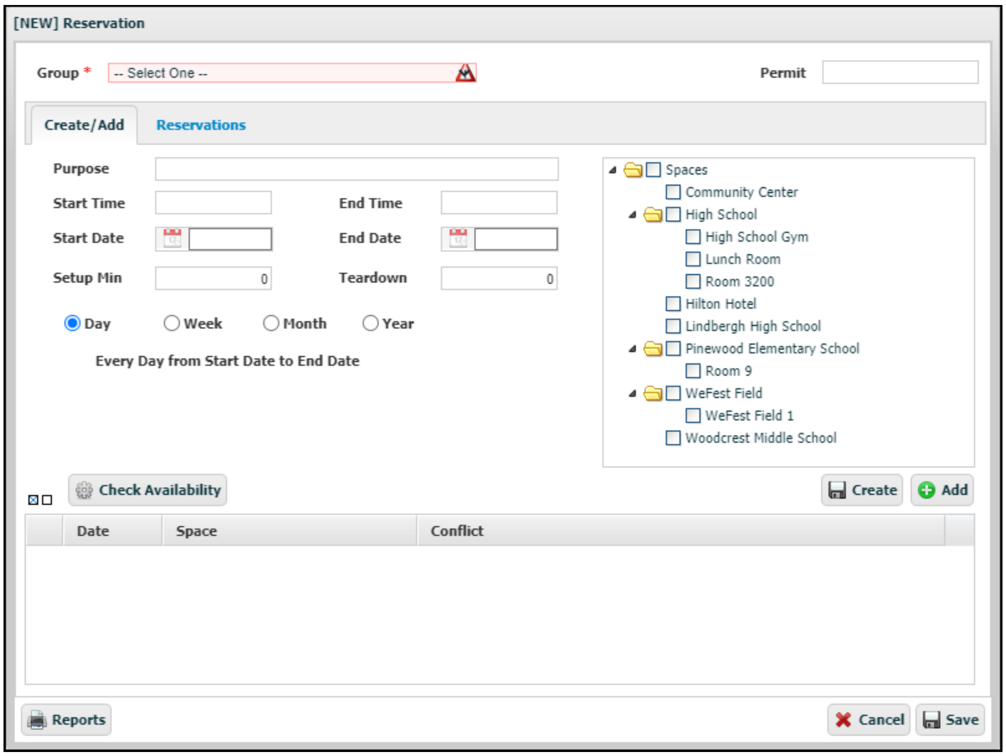
Registration Fee (Additional Child Deduction): The Registration Fee (Additional Child Deduction) defines the amount paid for an additional child's registration fee. If this field is set at $0, registration fees will only apply to the first child's registration, regardless of how many additional children in the family may register for the class. However, if additional family members should be required to pay a registration fee, then this field must have a dollar amount to calculate each **Additional Child's Registration Fee**.

Main Menu

The basic structure of a RegWerks web store is built using the **Setup** menu. Next, users create and manage the functionality of the software within the **Main** menu. Following initial setup, most work is completed using elements of the **Main** menu, which are described in greater detail below.

Reservation

The **Reservation** screen enables users to reserve unique spaces and assign each space to a group. With the exception of select contract classes, reservations are not required. To add a reservation, click on **Reservation** in **Main** menu in the upper left corner of the page. Click the green **Add Record** button at the top left of the page.



Create/Add Tab

Creating a Reservation

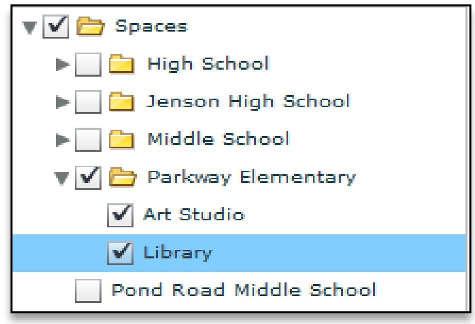
To create a reservation, select a Group from the **Group** drop-down menu. A Group can either be internal or external, and is used to categorize who will use the building or space. Groups are required in Reservations and must be set up in advance of the Reservation to which the Group will be assigned.

Designate the **Purpose** of the reservation, which will become the reservation's name. The Purpose will only appear on the **Events** page if it is an external reservation. For example, a PTA meeting that will be using the **Library** in **Parkway Elementary**. If the reservation is attached to a class, the name of the class will show on the **Events** menu option.

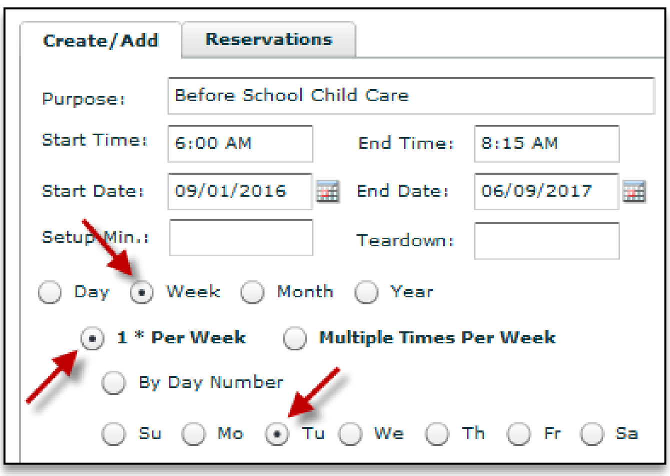
Choose a **Start Time** and **End Time** for the reservation as well as a **Start Date** and **End Date.**

Next select a space from **Spaces**. To open the full options list in **Spaces**, click on the arrow in front to the left of **Spaces**. To reserve a space, click on the checkbox in front of the space name.

To reserve a parent space, click on the checkbox in front of the parent space name to reserve the whole space. For example, if you check **Parkway Elementary**, you will reserve both the **Art Studio** and **Library**.



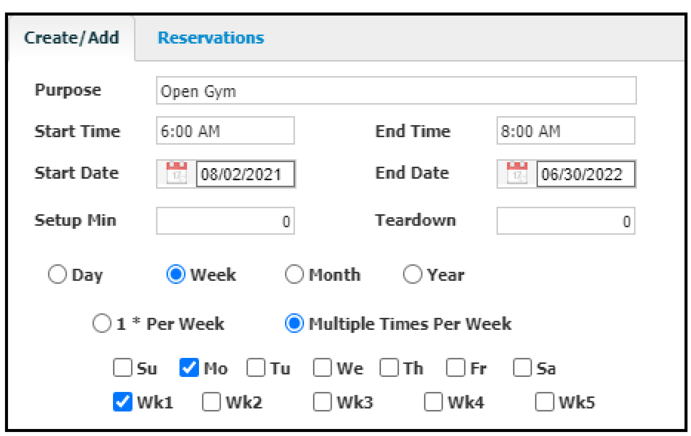
Recurring events which take place over an extended period of time may be selected using radio buttons: Day; Week; Month; and Year. For a class that is a onetime occurrence, select the **Day** radio button.



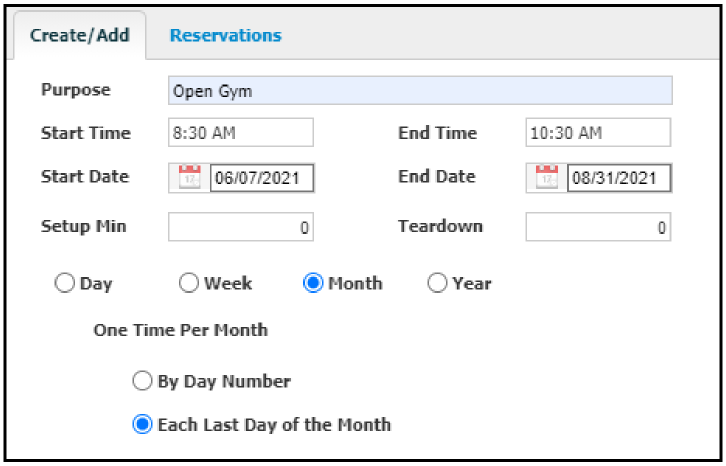
For an event or class that happens once a week, click the **Week** radio button, then the **1* Per Week** radio button. Finally, choose the day of the week on which that class occurs.

For an event or class that happens multiple times in the same week, click the **Week** button, then the **Multiple Times Per Week** button. You will also need to select the corresponding **Week** button. If the event or class happens every week for an extended period, select **Wk1** through **Wk5**.

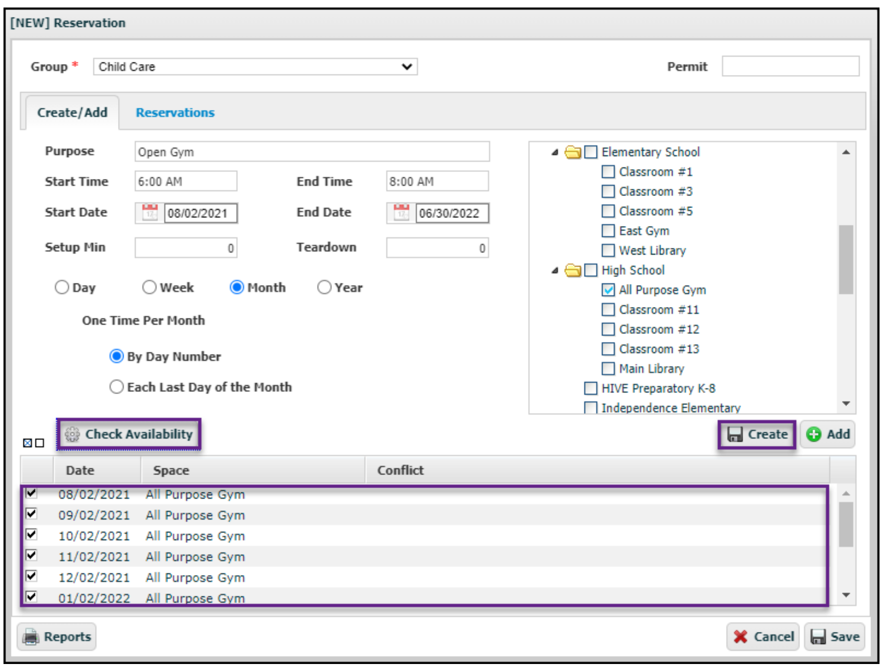
For example, to create an event or class that meets on the first Monday of the month, choose the **Week** radio button, the **Multiple Times Per Week** button, the **Mo** checkbox, and the **Wk 1** checkbox.



For an event or class that occurs once a month, click the **Month** radio button. Next select the **By Day Number** radio button. If the class occurs on the last day of the month, choose **Each Last Day of the Month** button.



After selecting date(s) and Space, users ***must*** check the space's availability for this event by clicking the **Check Availability** button. The software will then list all requested dates beneath the **Check Availability** button.

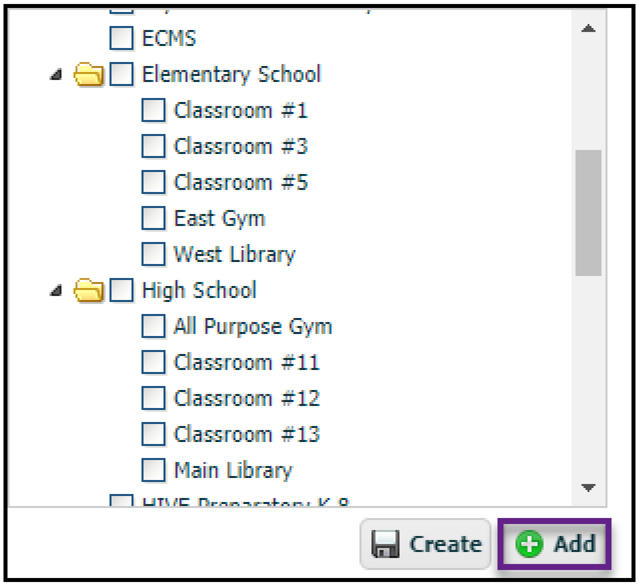


For requested dates on which there is a conflict, the checkbox will be unchecked and the conflict will be listed. Users may override a conflict and choose to schedule the date anyway by manually checking the checkbox.

To quickly override all conflicts, click the **Check All** button. This is useful if, for example, the class is scheduled at a swimming pool and even though other groups will be using the pools, there is plenty of room for this class to take place at the same time.

Select the **Create** button to create the Reservation.

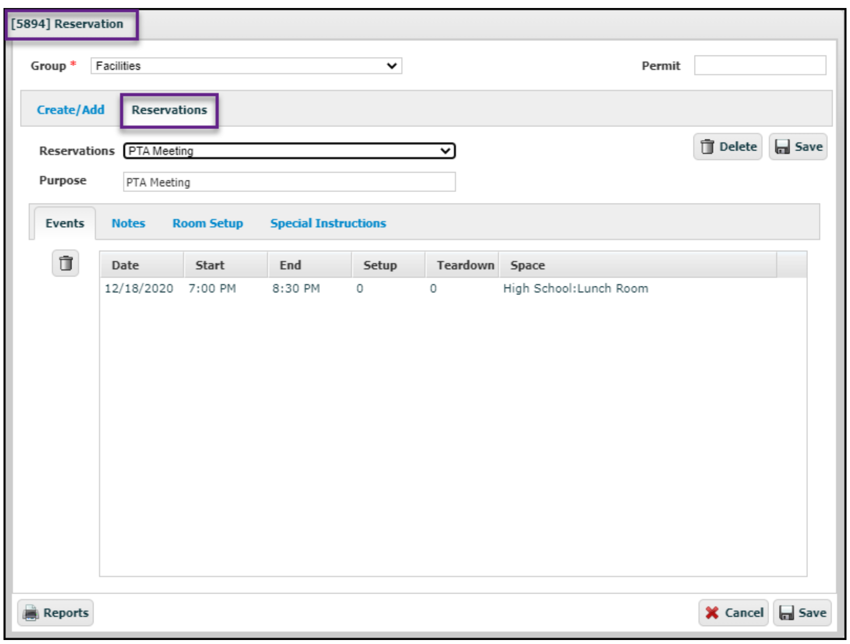
Adding Dates to an Existing Reservation



To add dates to an existing Reservation, follow the reservation process as described above, but instead of creating the reservation, click the **Add** button. The **Add** button offers a menu of existing events to which users may add a date or dates.

Reservations Tab

The **Reservations** tab in the **Reservation** window allows users to view and modify existing reservations.



To see a Reservation, click on the **Reservations** drop-down menu and select the appropriate Reservation. The **Events** tab list will display the dates associated with that Reservation.

To delete a Reservation completely, click once on that Reservation in the **Events** tab. Next, click the **Delete** button in the upper right corner. A prompt will confirm that the Reservation should be deleted. Select **OK** to complete the process. To rename a Reservation, change the title in **Purpose**, then click **Save**.

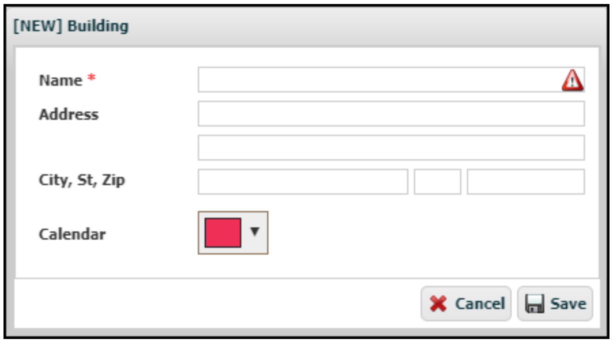
The **Events** tab tracks events for each Reservation. To delete a specific date from the Reservation, click the row with the appropriate date, then select the **Trash Can** button on the left.

Add notes for internal reference in the **Notes** tab. The **Room Setup** tab allows users to record any specific instructions for setting up the room for that Reservation. Add any additional special instructions in the **Special Instructions** tab.

Building

The **Building** menu option tracks buildings for your organization. Buildings are then used to narrow searches for rooms or reports.

Adding a Building



To add a building, click the **Add Record** button. Type in the **Name** of the building along with the **Address.** The location will then appear as a Google Maps link to users. To change the color of the building as it appears in the calendar, click on the color box next to **Calendar**. Click **Save** once complete, or select **Cancel** to cancel your work without saving.

Editing a Building

To edit a Building, first select **Building** in the Main menu. Double click into the appropriate **Building** within the list of Buildings. Enter the necessary changes for the name or address. **Save** to complete or **Cancel** to close without finalizing any changes.

Deleting a Building

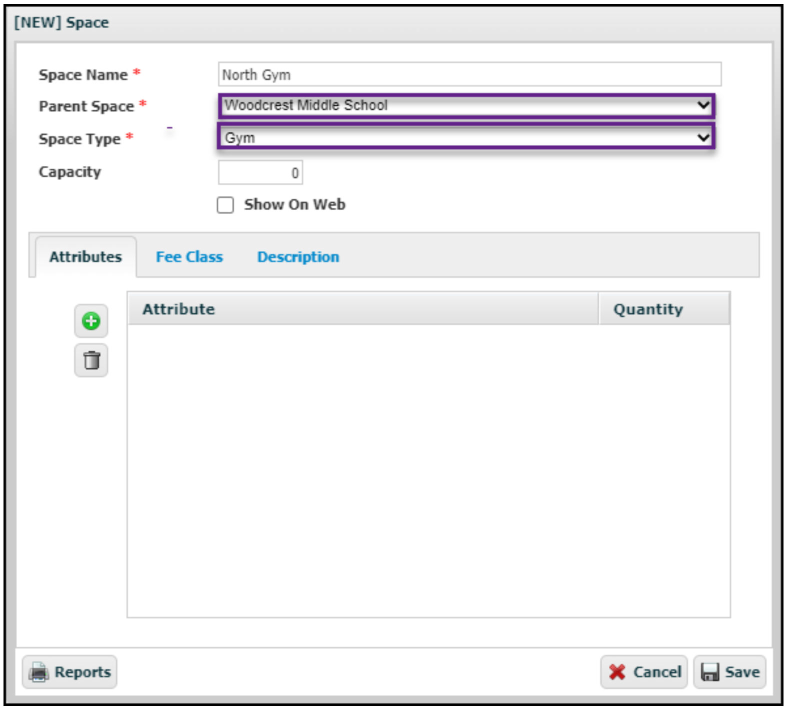
To delete a building, select it in the **Building** list and click **Delete**. Complete the prompt to confirm the deletion, then select **OK**.

Space

The **Space** menu option creates a space within a building. This could be a classroom, a gymnasium, a portion of a gym, or any other location which may be reserved in the building.

Adding a Space

To add a space, select **Space**, then click the **Add Record** button. Add the name of the **Space** and assign it to a **Parent Space** using the **Parent Space** drop-down menu. An example of a Parent Space would be a school, which would be the parent space for a North Gym and a South Gym.



Next, choose the space type from the **Space Type** drop-down menu. The **Capacity** field tracks the number of people that a space can accommodate.

The **Show On Web** checkbox enables users to choose to show or hide the space on the Web Store.

The **Attributes** tab assigns descriptive attributes to a space so that users may search for spaces based on these attributes (i.e. the space has a sink).

The **Fee Class** tab allows users to adjust the fee for the space based on who is using it.

The **Description** tab may be used to display a general description of the space.

Click **Save,** once setup of the space is complete.

Editing a Space

To edit a Space, double-click on the name of the appropriate Space. Type in any corrections before clicking **Save**.

Deleting a Space

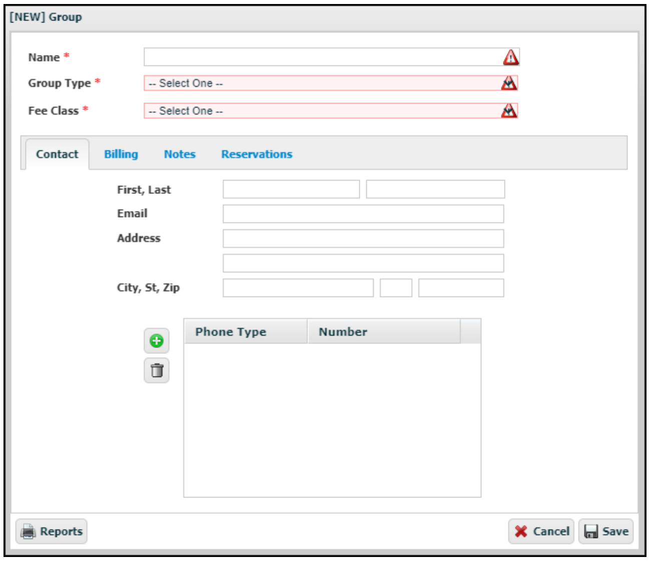
To delete a Space, select Space in Main menu. Next, click once on the appropriate Space name in the **Space** list. Click **Delete Selected** in the upper left-hand corner. A prompt will appear to confirm the deletion. Select **OK** to complete the process.

Group

The **Group** menu option creates the groups that use the various spaces. A Group may be either an internal group or an external group that will be leasing the Space.

Adding a Group

To add a group, select **Group** in the Main menu, then click the **Add Record** button. Enter the name of the group and assign it a **Group Type** and **Fee Class** from the drop-down menus.



The **Contact** tab records the contact information for the person in charge of the group.

The **Billing** tab tracks billing information for the person in charge of billing in the group. If the Contact and Billing information is the same, leave the Billing tab blank, and the system will default to the contact information.

The **Notes** tab displays notes that pertain to the group.

The **Reservations** tab lists all the reservations made for the group.

Editing a Group

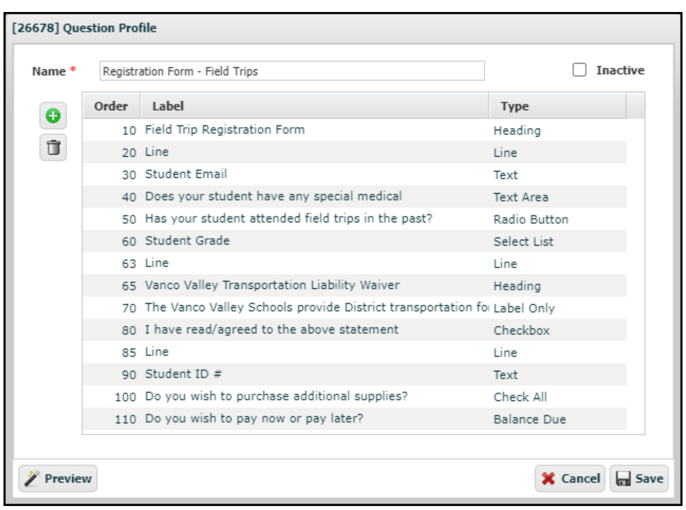
To edit a Group select **Group** in Main menu. Double-click on the name of the appropriate group. Enter edits before clicking **Save**.

Deleting a Group

To delete a group, navigate to **Group** in Main menu, select it in the **Group** list and click **Delete Selected** in the upper left-hand corner. A prompt will appear to confirm the deletion. Select **OK** to complete the process.

Question Profile

The **Question Profile** menu option creates a Question Profile, which consists of a list of custom questions which may be assigned to a Program or Course. Question Profiles may contain any number of questions, in a variety of formats. Question Profiles may also be used multiple times in different Programs or Courses. Once the Question Profile is assigned to a Program or Course, registrants answer the questions before completing a Class registration within the given Program or Course.



When creating Question Profiles, users may wish to consider the various ways in which information may be collected and used. As an example, Standard Questions may be assigned at the Course level to collect the following information: Date of Birth; Student Grade; Emergency Contact; and Special Considerations. Information gathered by Standard Questions will automatically appear in Class Roster reports.

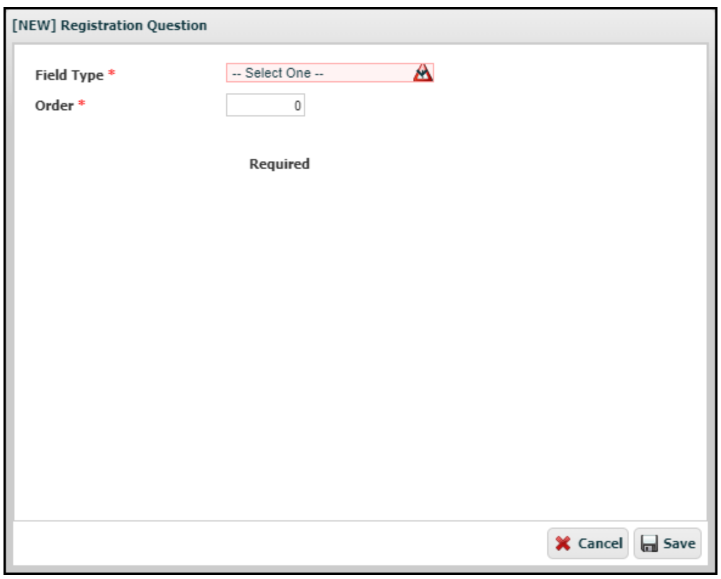
It will also be important to consider whether the Question Profile will be assigned at the Program or Course level. Question Profiles assigned at the Program level will be completed by all participants within that Program. Users may wish for a Program level Question Profile to collect global information. Alternatively, Question Profiles assigned at the Course level may be used to collect subject-specific information based on Course content and/or information needs for the Classes within the given Course.

Creating a Question Profile

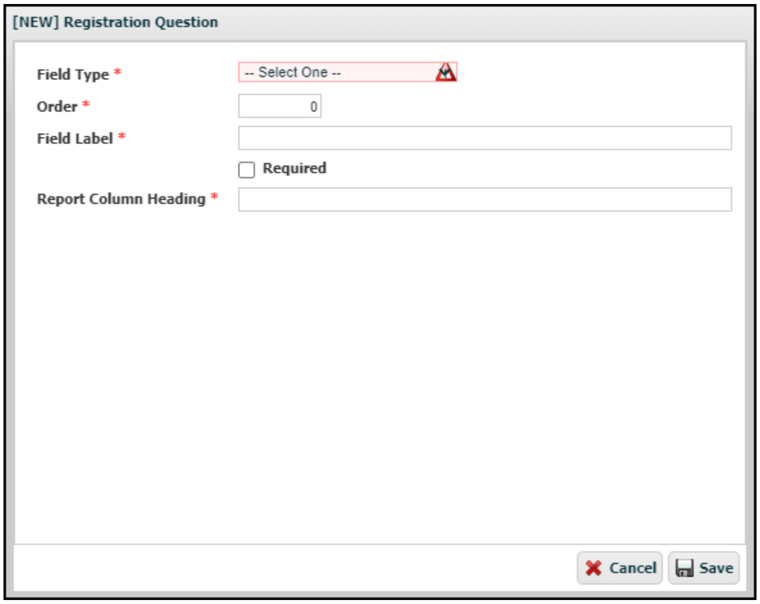
To create a Question Profile, click once on **Question Profile** in the Main menu. Select the **Add Record** button and name the Question Profile before clicking **Save**. Once the Question Profile has been saved, double-click into that Question Profile to add questions.

Adding a Question to a Question Profile

To add a question to a Question Profile, click on the **Plus Sign** to the left of the questions field, and a **NEW Registration Question** window will open.



In the **NEW Registration Question** window, enter information into the following fields to create a list of questions.



Field Type: The **Field Type** is a drop-down menu that lists the different question formats.

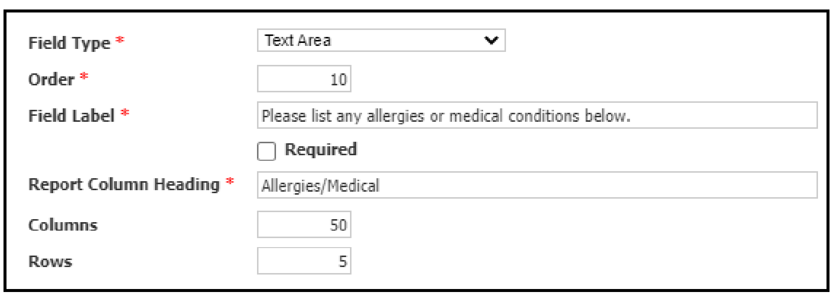
Order: The **Order** field organizes questions numerically. It is recommended that questions are organized in increments of 10 (i.e. question #1 has an Order of 10; question #2 has an Order of 20). Organizing questions in this manner allows users to enter additional questions in the future without reordering the entire list of questions.

Field Label: The **Field Label** displays the question as families will read it during registration. For certain types of entries (i.e. Line), only the title for the item will appear.

Required: Click on the **Required** check box to make the question a requirement for all registrants.

Report Column Heading: Enter a brief description of the question topic (one or two words). Once registration begins, this description becomes the heading of the corresponding report column in user-generated reports which track registration data.

Field Types

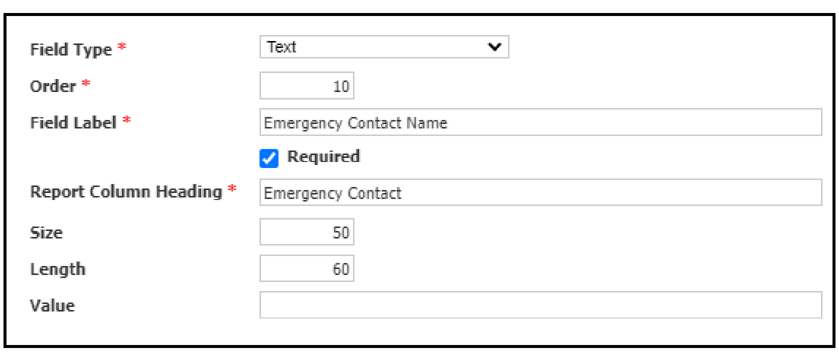


Text Area

A **Text Area** question offers adequate space for responses to open-ended questions, which often require longer explanations.

Select the **Required** checkbox for questions which must be answered during registration.

Columns is a legacy element which used to refer to the width of the text area box. In the current mobile environment, the width of the text area expands to fit the screen on which it is being displayed. Therefore, **Columns** may be set to 0. **Rows** refer to the height of the text box.



Text

A **Text** question offers a single line of text for registrant's responses.

Select the **Required** checkbox for questions which must be answered during registration.

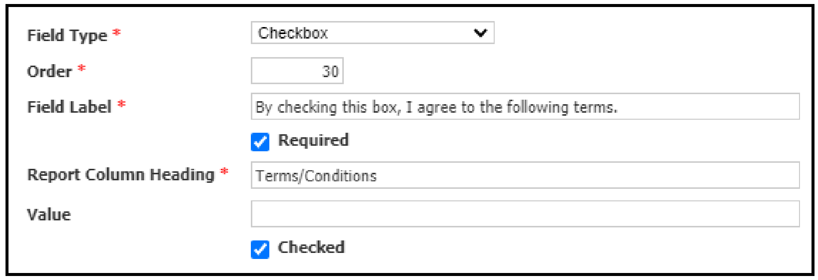
Size refers to the width of the text box, and **Length** refers to the number of characters the field will accept.

Text entered in the **Value** field will autofill the text box on the registration and will be seen by the registrant. The one drawback to entering sample text in the **Value** field is that RegWerks accepts the sample text as the registrant's response. Therefore, this sample text will appear on reports as if it were the registrant's response. Where a **Value** has been entered for a **Required** question, the system allows registrations to be completed even if no response is added during registration.

Checkbox

A **Checkbox** appears as a question or statement to which the registrant must respond by checking a checkbox.

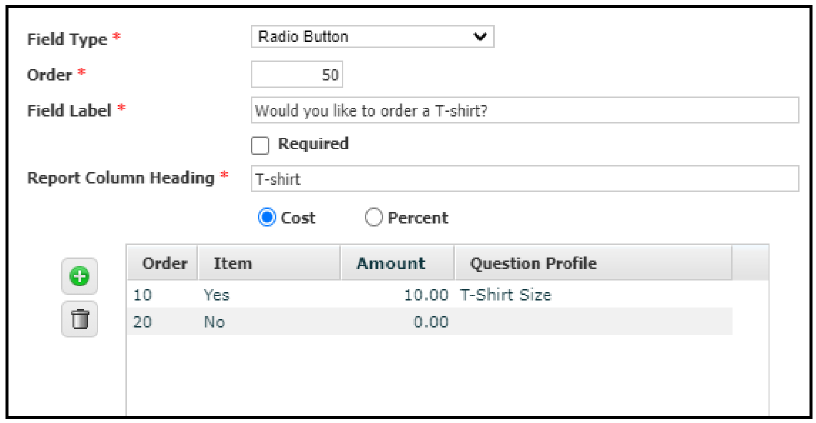
If the **Checked** box is checked, the checkbox will automatically be checked on the registration.



Radio Button

A **Radio Button** appears as a set of radio buttons from which the registrant must make one selection.

To create a button, click on the **Plus Sign** button. In the NEW Registration Question Option window which appears, complete the details for the question. In the example, the Item is the response, Yes or No.



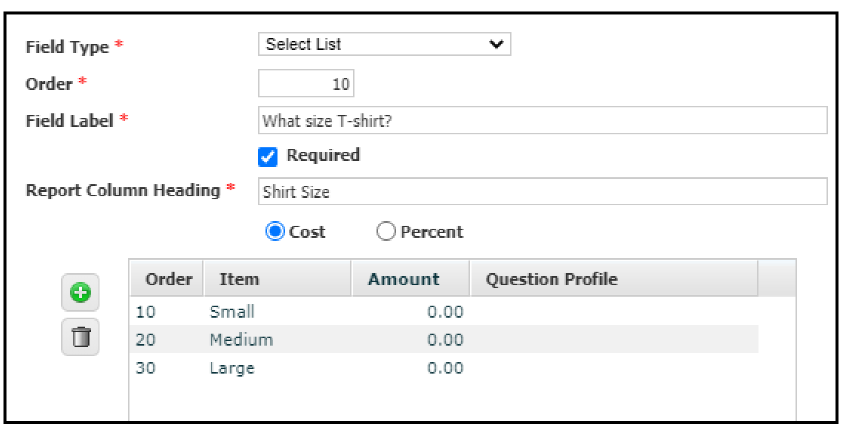
The price of the class may be modified by entering a positive or negative amount into the **Amount** field. In the example, registrants who agree to buy a T-shirt have $10 added to the price of the class to account for the shirt price.

Lastly, Question Profiles may be added to a button so that, when selected, a new set of questions will be posed. These new questions are called question-based questions. In the example, registrants who agree to buy a T-shirt will be asked a second set of questions about T-shirt size.

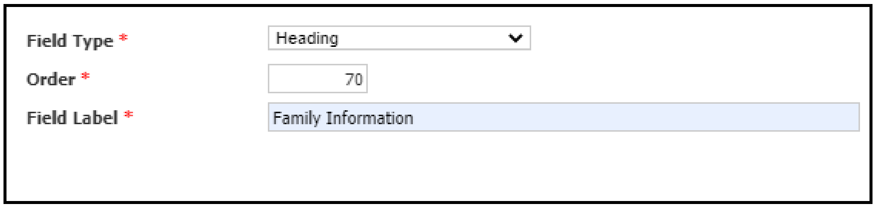
Select List

A **Select List** appears as a drop-down menu containing various answers from which the registrant must make one selection.

To create a select item, click on the **Plus Sign** button. In the NEW Registration Question Option window, complete the details for the question. In the example, the Items are shirt sizes.



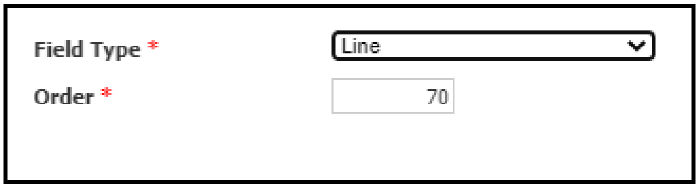
As with the radio button, users may attach question-based questions to a Select List to pose a second set of questions as well as to modify class price.



Heading

A **Heading** is text which appears in large, bold font and precedes subsequent questions or profile elements.

For example, when posing three questions related to family information and two questions related to class needs, adding one heading, Family Information, and a second heading, Class Needs, creates a visual break between the two sets of questions.

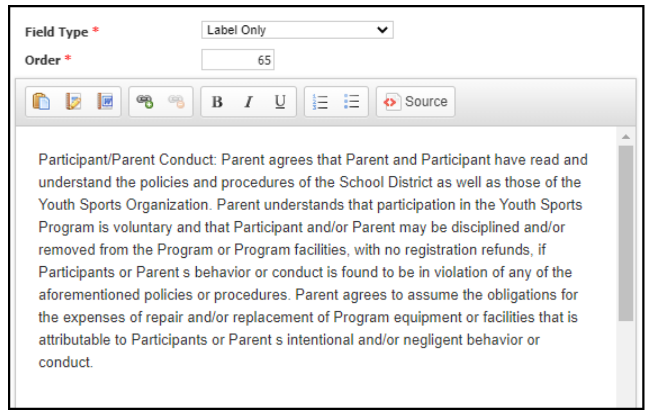


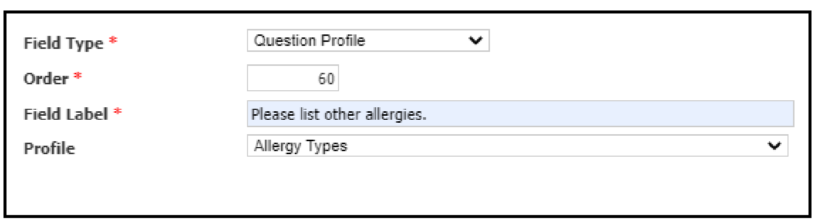
Line

A **Line** appears as a horizontal line on the page and is used as a visual break between questions or sections in the registration form.

Label Only

With the **Label Only** field type, text entered in the **Field Label** appears in the live Web Store as a block of text with paragraph style formatting. Label Only offers a variety of applications, ranging from giving the registrant instructions or information, to presenting registrants with the terms of a required form.



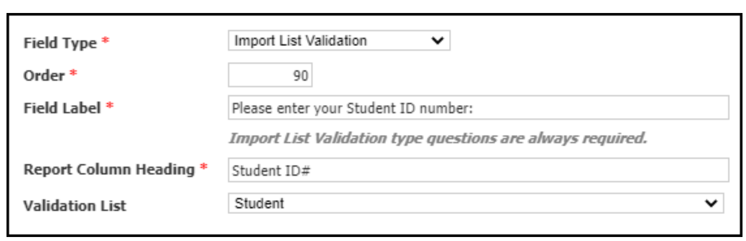


Question Profile

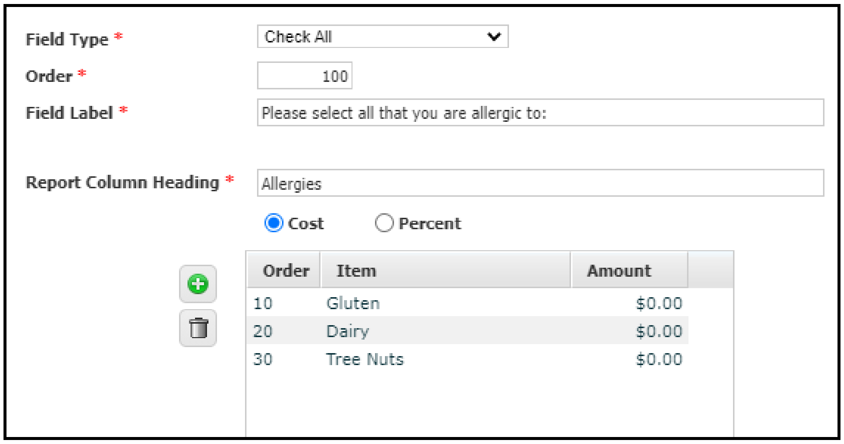
To link one Question Profile within another, select the **Question Profile** field type. In the **Profile** field, make the appropriate selection within the drop-down menu of Question Profile options.

Import List Validation

An **Import List Validation** compares the registrant's response to an existing list that was previously uploaded to the RevTrak Web Store. Use of a Validation list limits the possible participant pool to only those people included in the list. Import Lists are created, uploaded, and maintained by the client organization in RevTrak.



For example, registrants may be required to enter Student/Employee ID number and last name. If the ID number and last name match information in the imported validation list, the registration will be accepted. If they do not match, the registrant will not be able to complete the registration process. Import List Validation is case sensitive.



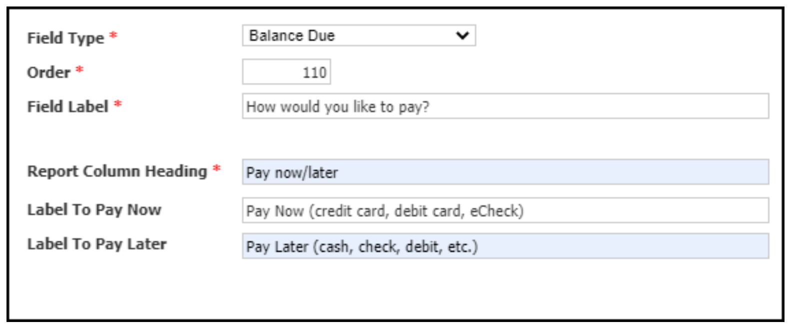
Check All

A **Check All** question appears as a number of checkboxes from which the registrant can select as many as needed. To create a Check All item, click on the **Plus Sign** button. In the NEW Registration Question Option window which appears, complete the details for the question. In the example, the Items are allergy types: Gluten; Dairy; and Tree Nuts.

A Check All item may also be used to modify the price of the class by entering a positive or negative amount into the **Amount** field.

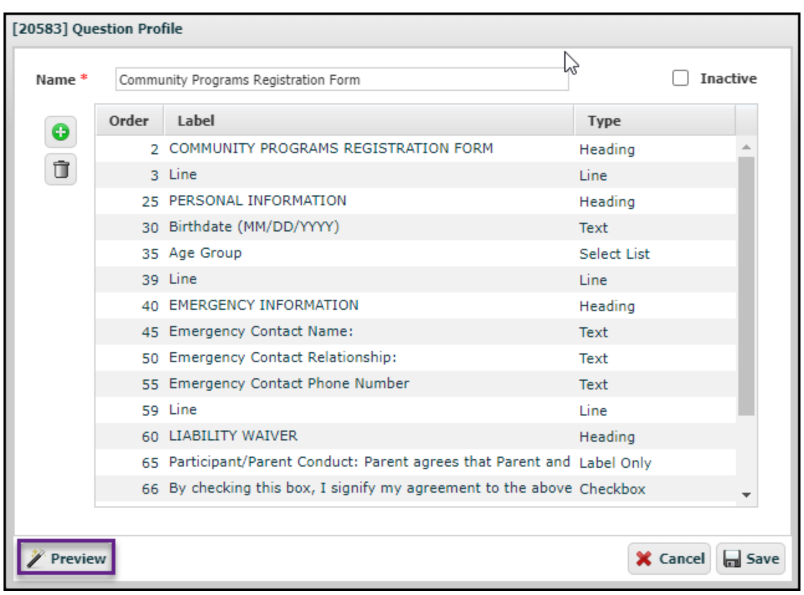
Balance *Due*

The **Balance Due** question allows the registrant to select whether they would like to **Pay Now** (meaning pay at checkout) or **Pay Later,** which will allow them to complete the registration without making a payment. If **Pay Later** is selected, the system will maintain a balance on the account until the registrant brings a cash or check payment to the school office or makes an ePayment through the **Parent Portal**.



Previewing a Question Profile

To review a Question Profile, either during set-up or subsequently, select the **Preview** button in the lower left-hand corner of the **Question Profile** window. A new tab will open and will display the overall appearance of the registration form as it will appear for families in the live Web Store.



Deleting a Question

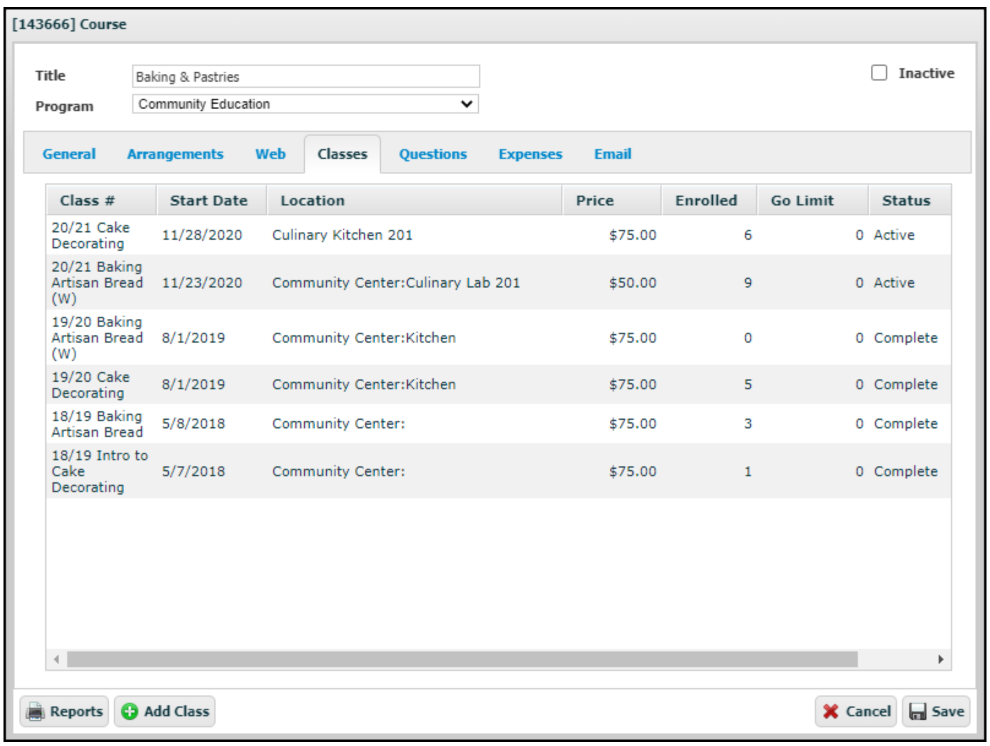
To delete a question, select it in the **Questions** list and then click on the **Trash Can** button. A prompt will appear to confirm the deletion. Select **OK** to complete the process.

Deleting a Question Profile

To delete a question profile, select it in the **Question Profile** list and then click on the **Delete** button in the top left-hand corner of the screen. A prompt will appear to confirm the deletion. Select **OK** to complete the process.

Course

A **Course** is the third level of the software's overall hierarchy and offers specific classes. For example, the course "Baking & Pastries" has six classes: 20/21 Cake Decorating; 20/21 Baking Artisan Bread; 19/20 Baking Artisan Bread; 19/20 Cake Decorating; 18/19 Baking Artisan Bread; and 18/19 Intro to Cake Decorating.



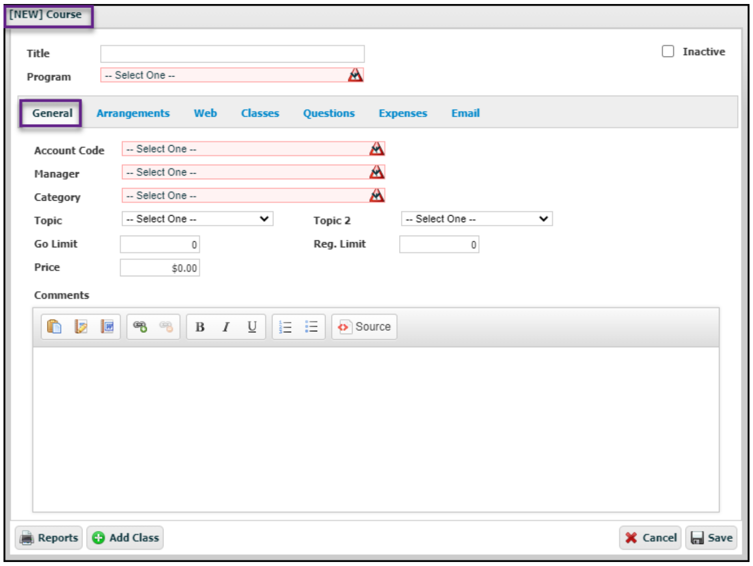
Class #	Start Date	Location	Price	Enrolled	Go Limit	Status
20/21 Cake Decorating	11/28/2020	Culinary Kitchen 201	$75.00	6	0	Active
20/21 Baking Artisan Bread (W)	11/23/2020	Community Center:Culinary Lab 201	$50.00	9	0	Active
19/20 Baking Artisan Bread (W)	8/1/2019	Community Center:Kitchen	$75.00	0	0	Complete
19/20 Cake Decorating	8/1/2019	Community Center:Kitchen	$75.00	5	0	Complete
18/19 Baking Artisan Bread	5/8/2018	Community Center:	$75.00	3	0	Complete
18/19 Intro to Cake Decorating	5/7/2018	Community Center:	$75.00	1	0	Complete

To add a Course, in the Main menu select **Course**, then click on the **Add Record** button in the upper left corner. The **NEW Course** window will open. Assign the Course a **Title** and complete the remaining required fields.

Select the **Inactive** checkbox for any courses that are inactive and should not be shown on the Web Store. By doing so, this filters out the inactive courses from the **Course** menu option list, which only shows the **Active** classes by default.

When the required fields are complete, click **Save**. Once the course has been created, users may click into it again to finish set up, or to create new classes for the course.

General Tab



Manager: Under the **General** tab, users must select a **Manager** from the drop-down menu. An example of a manager is a pool manager who oversees all swimming courses. The **Manager** is the person who receives an email if a customer requests more information in the Web Store.

Category: Select a **Category** from the drop-down menu.

Topic: Users may choose up to two **Topics** for the Course to cross-reference it with other Courses in the Web Store.

Go Limit: Users may choose to enter the default **Go Limit**, which refers to the number of students that must be enrolled in order for a Class to proceed. The system is not limited by a class' Go Limit, as it is purely for informational purposes.

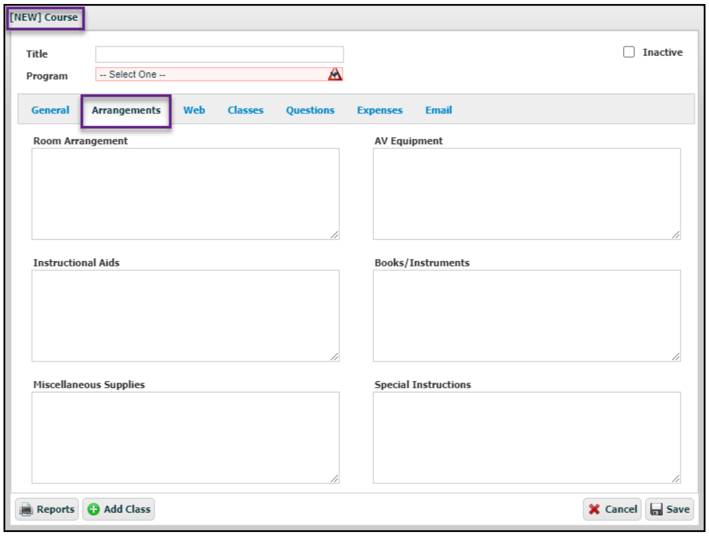
Reg. Limit: The **Reg. Limit** is the maximum number of students that can be registered for a class through the Web Store. When the **Reg Limit** is reached, students who complete any subsequent registrations are added to the Waitlist, if Waitlist is enabled for the class. Otherwise, the Web Store will simply display a message that says the class is full, and no additional registrations may be completed.

Price: The **Price** is the default price for each Class in this Course. When set at the Course level, the **Go Limit**, **Reg. Limit,** and **Price** become the default for every new Class that is created, although they can be manually overridden in each Class.

Comments: The **Comments** area provides a space in which to enter comments for internal review by users.

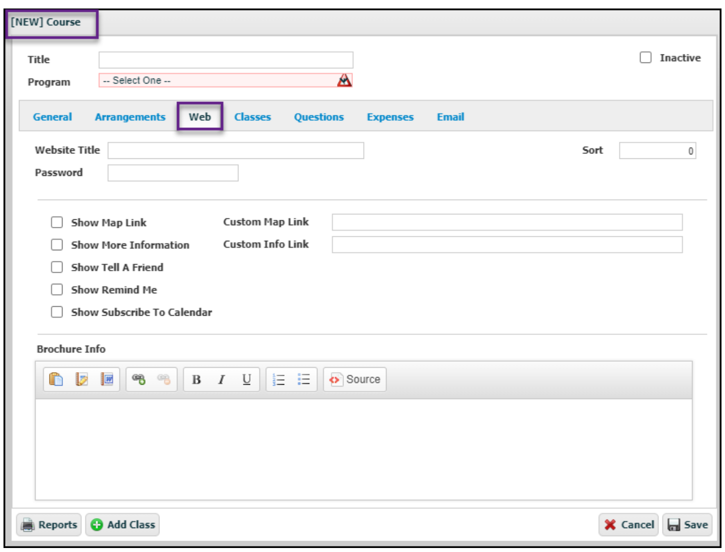
Arrangements Tab

In the **Arrangements** tab, users may add specific instructions for each Course and then print them using the **Facility Setup report**.



Web Tab

Information entered in the **Web** tab appears beneath the **Course** heading on the Web Store.

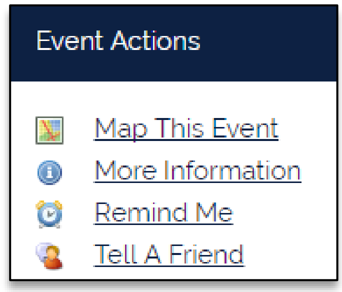


Website Title: The **Website Title** allows users to change the **Title** of the Course as it will appear on the Web Store. The **Website Title** becomes the public name for the Course, while the **Title** acts as the internal name for the Course.

Sort: By default, RegWerks automatically puts Courses in alphabetical order. Users may manually sort Courses by entering a numeric value in the **Sort** field.

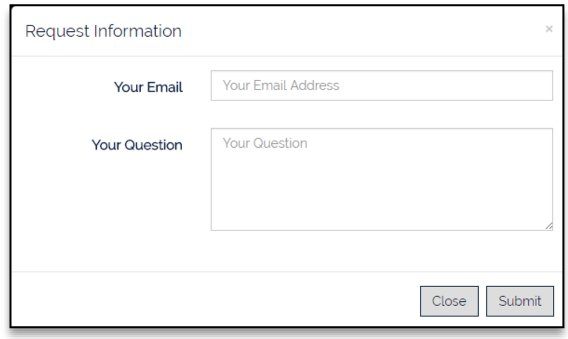
Password: The **Password** field allows users to password-protect a class. Only those customers who receive the password may register for Classes in this Course.

Brochure Info: The **Brochure Info** field provides space for a Course description. This description is displayed on the **Course List** page on the Web Store as well as the **Class Details** page. The description is limited to 180 characters on the **Course List** page but displays in full on the **Class Details** page.



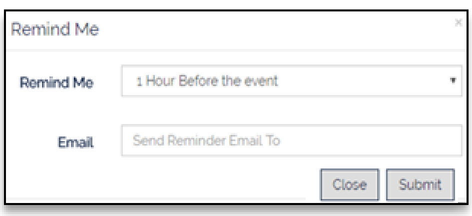
Show Map Link: By checking the **Show Map Link** checkbox, users choose to display a **Map This Event** button under the **Event Actions** menu at the **Class Details** page on the Web Store. When selected, a Google Maps tab or window displays the address at which the class is taking place. Users enter this address in the class' **Schedule** tab.

Custom Map Link: When using an address other than the one associated with the class, users may paste the URL in the **Custom Map Link** field and override the building location link.



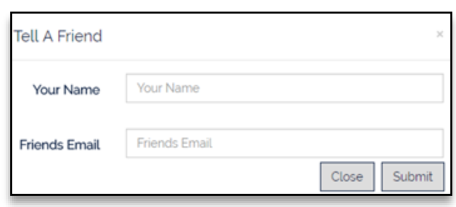
Show More Information: By checking the **Show More Information** checkbox, users choose to display a **Request Information** button under the **Event Actions** menu. This allows the customer to submit a question and enter the email address at which they would like to receive a response. Once they submit the question, it will be emailed to the Manager of the Class.

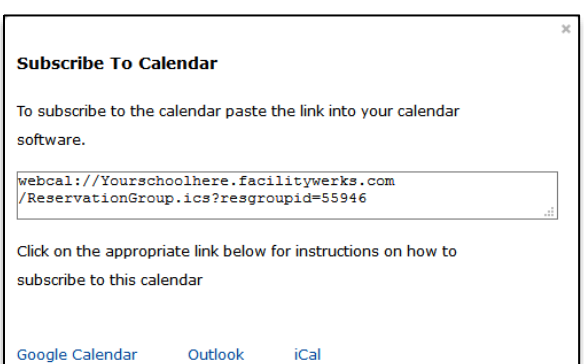
Custom Info Link: Paste the URL in the **Custom Info Link** field to direct the customer to a website. This will change the button to read **More Information** and open that page when clicked.



Show Remind Me: By checking this checkbox, users choose to display a **Remind Me** button under the **Event Actions** menu. This allows the customer to enter their email address and choose a time frame in which they would like to receive an email reminder prior to the event.

Show Tell a Friend: By checking this checkbox, users choose to display a **Tell a Friend** button under the **Event Actions** menu. This allows the customer to enter his/her name along with the email address of a friend to whom they would like to send the details of a class. RegWerks then forwards this information via email to the friend.

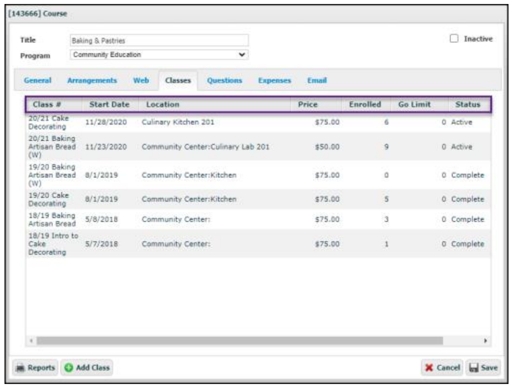




Show Subscribe to Calendar: By checking this checkbox, users choose to display a **Subscribe To Calendar** under the **Event Actions**. This allows the customer to subscribe to the Class Schedule using iCal, Google Calendar, Outlook, or other calendaring subscription software. This feature is only available for Classes using a Reservation.

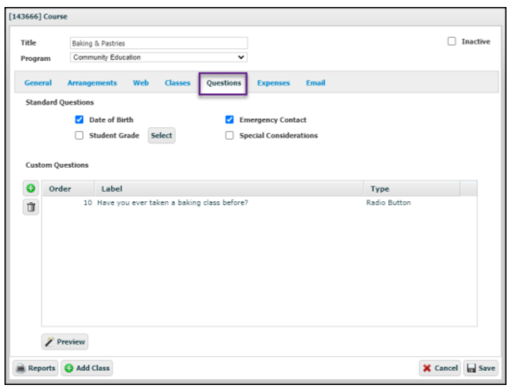
Classes Tab

The **Classes** tab lists each Class offered for that Course. In this tab, users create new Classes, as well as see a list of every class that has been offered under this course. The list displays each class' **Class Number**, **Start Date**, **Location**, **Price**, **Enrolled (enrollment)**, **Go Limit**, and **Status**. Double-click on a Class to open the **Class** window.



Questions Tab

Standard Questions, Custom Questions, and Question Profiles may be added at the **Course** level in the **Questions** tab. These questions are then included during registration for every Class offered in this Course.



Standard Questions

Standard Questions are pre-made Question Profiles that ask four questions which are commonly included on registration forms. Rather than adding these questions manually in the Questions tab or in a Question Profile, users simply check the box next to each question that needs to be included on the registration form. Information gathered by Standard Questions will automatically appear in Class Roster reports.

Student Grade: After selecting **Student Grade**, users may click the **Select** button and designate the grades from which registrants must choose.

Special Considerations: The **Special Considerations** profile gives the registrant a text area in which to enter any special considerations of which the teacher needs to be aware.

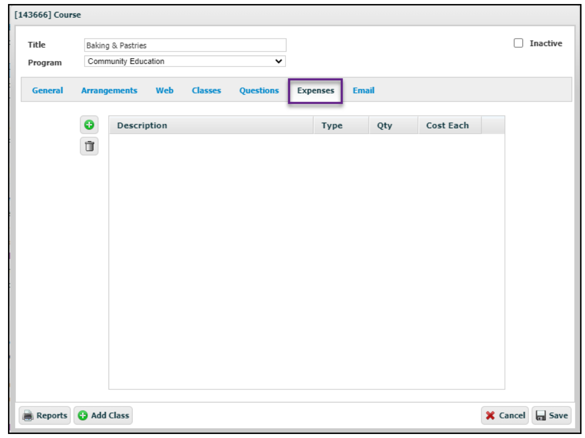
Any answers given for Standard Questions will auto-fill on every subsequent registration, as well as on the various information tabs on the registrant's profile under the **Person** menu option.

Custom Questions

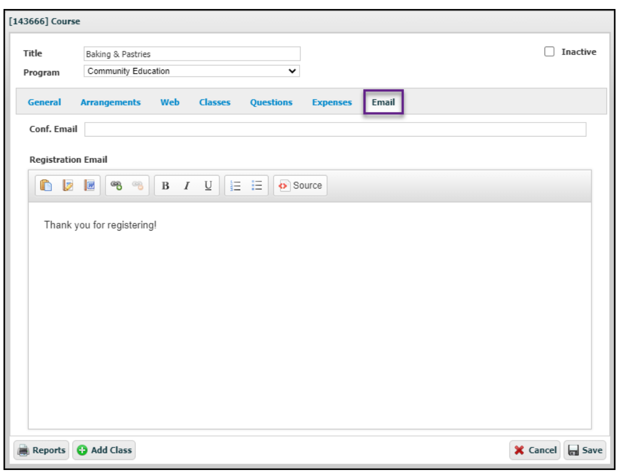
Custom Questions are any questions or Question Profiles that users create and attach to the registration for a specific Course. Users may include as many questions as needed, and the type of question can vary. To add a question, click on the **Plus Sign** button on the left-hand side in the **Course** window. To delete a question, click once on the appropriate question, and then click on the **Trash Can** button.

Expenses Tab

Expenses: The **Expenses** tab allows users to track all internal expenses associated with this course. To add an expense, click on the **Plus Sign** button on the left-hand side. Enter a description of the expense in the **Description** field. Next, click into the **Type** field, and select either **Fixed** or **Per Student** from the drop-down menu. Finally, enter the **Quantity,** as well as the **Cost** of the expense. If there are expenses entered at the **Course** level, they will carry down to future classes created after the expenses have been entered and saved.



Email Tab



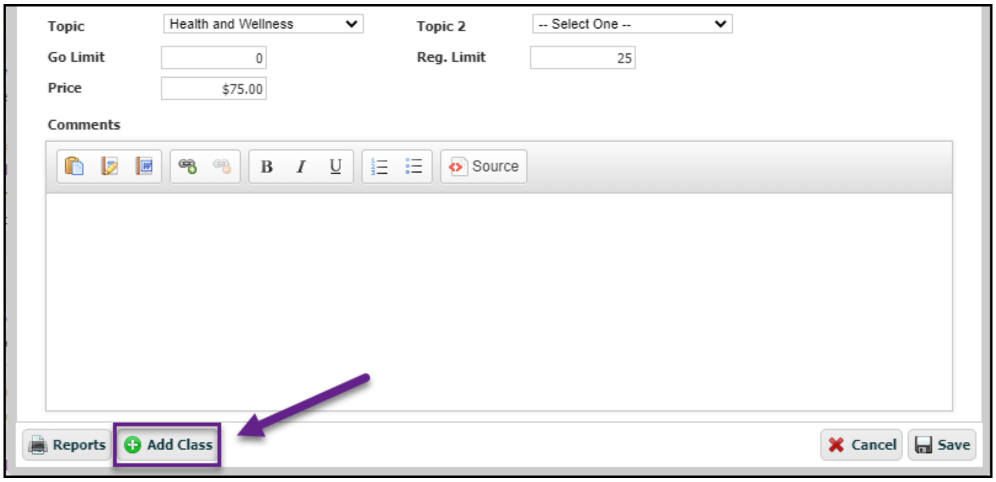
The Email tab allows users to manage the emails that are sent at the time of registration.

Conf. Email: If there is a person who should receive confirmation emails for the Course, enter that email address into the **Conf. Email field**. This email will carry down to all future classes offered by this course but can be modified at the **Class** level to be class-specific.

Registration Email: The **Registration Email** field allows users to create an email that will be sent to each registrant after they have registered for a Class in this Course. Registration Email can be used to send out a supply list, a "Thank you for registering" note, or any other information registrants may need. If a Registration Email is created for the Course, the text of the email will automatically copy into each new classes created after the email message was entered.

Class

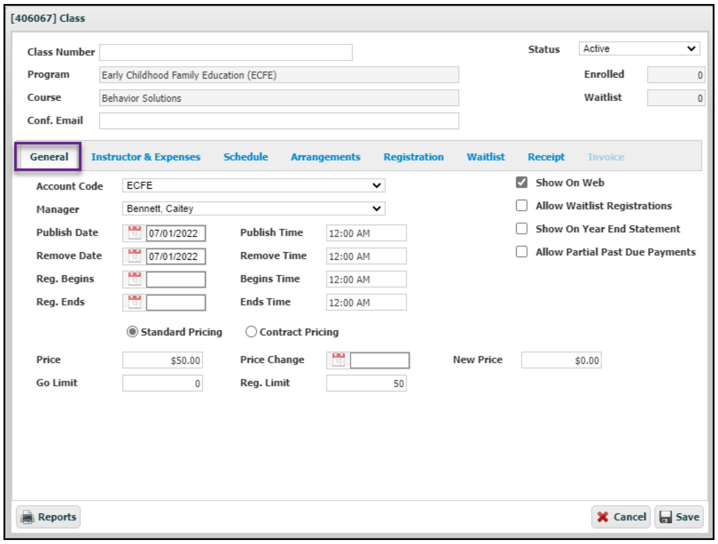
A **Class** is the fourth and final level of the software's hierarchy and is a specific offering within a Course. New Classes may only be created within an existing Course. To add a Class, double click on the Course in which the Class must be added. In the Course window that opens, click on the **Add Class** button in the lower left-hand corner.



Select **OK** when prompted to confirm that you wish to create a new class, and a **Class** window will open.

Some of the Course level information will cascade down to this new Class. The **Program** and **Course** carry over and cannot be changed. Assign the class a **Class Number**, which will function as the class title and must be unique. The class will be **Active** by default, but this status can be modified by clicking the **Status** drop-down menu in the top right-hand corner. The **Status** of a Class determines whether the Class appears in the **Course** menu option list in the Web Store; by default, the Course menu option list only displays Courses that have **Active** Classes.

General Tab



General information about the class is listed in the **General** tab. The **Account Code** and **Manager** as well as the **Price**, **Go Limit**, and **Reg. Limit** are automatically copied from the **Course** level when the new Class is created. These items can be overwritten to be class-specific.

Publish Date and **Publish Time:** The **Publish Date** and **Publish Time** are the date and time when the Class will become publicly visible in the Web Store.

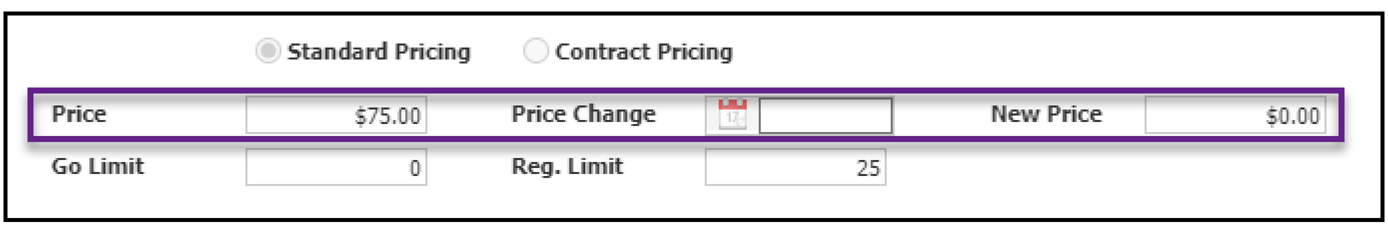
Remove Date and **Remove Time:** The **Remove Date** and **Remove Time** are the date and time when the Class will be removed from the Web Store.

Reg. Begins and **Begins Time:** The **Reg. Begins** and **Begins Time** are the date and time when students can begin registering for the Class. This can be different from the **Publish Date** if the class needs to be visible before registration opens. To simultaneously publish and open registration for the Class, leave **Reg Begins** fields empty by default, and registration will automatically begin when the Class goes live on the Web Store.

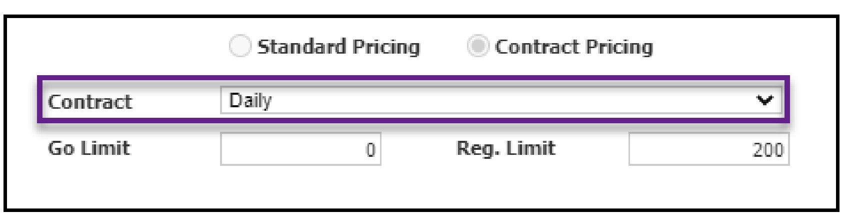
Reg. Ends and **Ends Time:** The **Reg. Ends** and **Ends Time** are the date and time when the registration for the Class will close. This can be different from the **Remove Date** if the class needs to be visible after the registration closes. To simultaneously remove and close registration for the Class, leave **Reg Ends** field empty by default, and registration will automatically close when the Class is removed from the Web Store.

Standard Pricing and **Contract Pricing:** The **Standard Pricing** and **Contract Pricing** radio buttons allow users to establish the pricing structure for the Class. Standard Pricing is used for Classes that require only a one-time payment made at the time of registration. Contract Pricing is used for Classes that require recurring payments over time.

When using **Standard Pricing**, users must enter the class' **Price**. The **Price Change** option allows users to set a date after which the price of the Class will change. After selecting the **Price Change** date, enter the new Price for the Class in the **New Price** field.



When using **Contract Pricing**, users must select a specific Contract in the drop-down menu to define the pricing structure of the Class. Users then invoice participants in the Class on a regular basis.

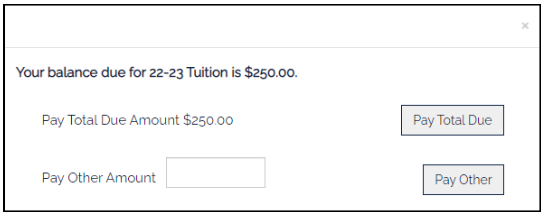


Show On Web: The **Show On Web** checkbox determines whether the class appears in the Web Store. To quickly remove a class, simply uncheck the box and click **Save**. The class will be immediately removed from the Web Store.

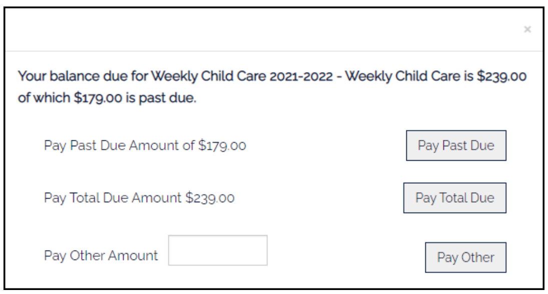
Allow Waitlist Registration: To allow students to be added to a "waitlist" once the class' **Reg. Limit** has been reached, users must select the **Allow Waitlist Registrations** checkbox. If this box remains unchecked, registrants will see a message indicating that the Class is full.

Show On Year End Statement: To allow families to include Class fees in their tax returns, select the **Show On Year End Statement** box. Any payments applied to Classes with this checkbox set will be shown on the **Tax Statement** reports.

Allow Partial Past Due Payments:



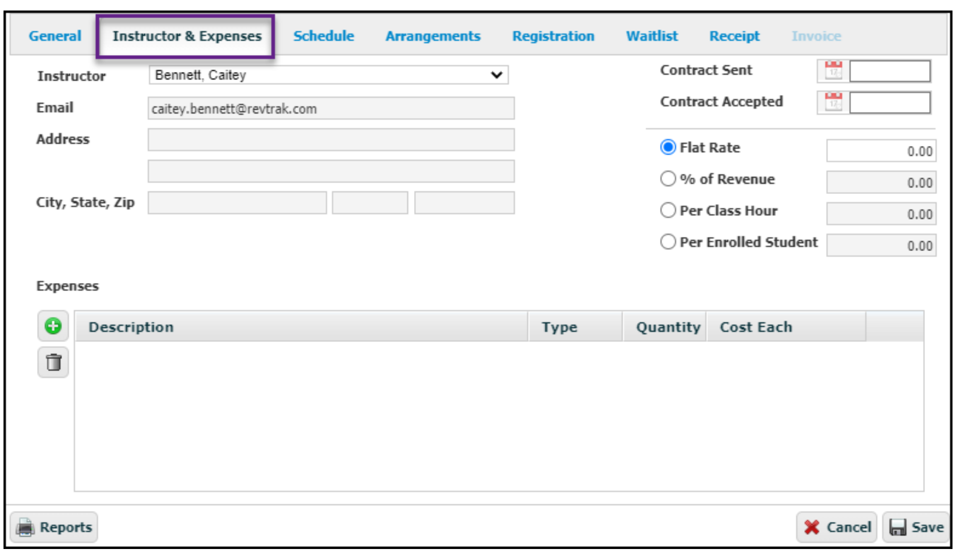
When selected, families may choose to pay the **Total Due** amount or **Pay Other** amount in any dollar amount in the Parent Portal.



When the feature is not selected, family options in the Parent Portal are as follows: **Pay Past Due** amount or Pay **Total Due** amount. Families must at least pay the **Past Due** amount to then be allowed to **Pay Other** amount.

Instructor & Expenses Tab

The **Instructor & Expenses** tab allows users to assign a specific instructor to the class as well as keep track of expenses.



Instructor: Select the instructor from the **Instructor** drop-down menu. All of the instructor's information fields will auto-fill with the information that was previously entered for that instructor in the **Instructor** menu option.

Contract Sent: The **Contract Sent** field tracks when the instructor was sent a contract.

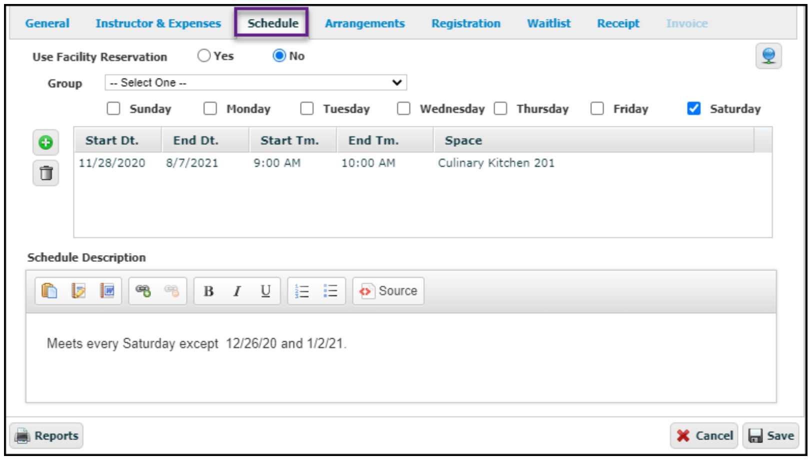
Contract Accepted: The **Contract Accepted** field tracks when the instructor accepted the contract.

Flat Rate, % of Revenue, Per Class Hour, and **Per Enrolled Student:** Instructor reimbursement may be calculated in a variety of ways—namely, **Flat Rate**, **% of Revenue**, **Per Class Hour**, and **Per Enrolled Student**. Depending on the calculation that is selected, this rate may be entered into the corresponding field to record the instructor's pay in the system. Users may review this expense using the class' **Profitability Reports**.

Expenses: The **Expenses** section may be used to track all internal expenses that are associated with this Class. To add an expense, click on the **Plus Sign** button on the left-hand side. Click into the **Description** field and enter a description of the expense. Next, click into the **Type** field, and select either **Fixed** or **Per Student** from the drop-down menu. Finally, enter the **Quantity** as well as the **Cost** of the expense.

Schedule Tab

In the **Schedule** tab, users may choose to use a reservation or manually create a class schedule.



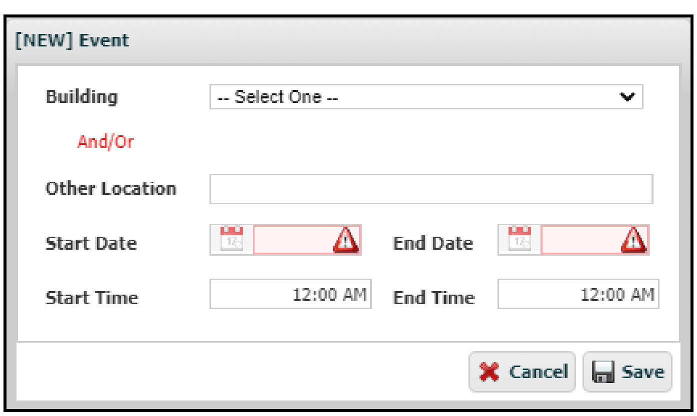
Use Facility Reservation: Users who have created a reservation for the class, may select the **Yes** radio button. The **Reservation Group** drop-down menu will appear, and the user may then select the reservation for the given Class. Once selected, the reservation's dates will appear in the **Schedule** list, and may be reviewed for accuracy.

When no reservation will be used, select the **No** radio button to manually schedule classes or class periods.

Group: Even when no reservation is used, users may assign the class to a group by selecting one from the **Group** drop-down menu.

Days: To specify the days on which the class will occur, check the corresponding boxes.

To add a class or class period, click on the **Plus Sign** button, which will bring up the **NEW Event** window.



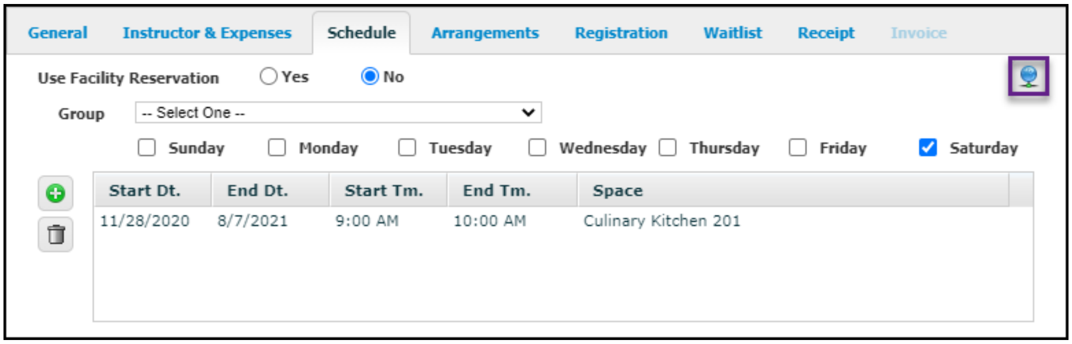
Building and **Other Location:** Choose from a list of existing buildings from the **Building** drop-down menu, which lists the building's name only and not a specific room. Alternatively, use the **Other Location** field to enter a location that is not currently entered in RegWerks. When using both a Building and Other Location, each item will be separated by a colon (i.e. Lakeville Elementary: The Gym).

Start Date and **Start Time:** The **Start Date** and **Start Time** are the date and time on which this class or class period begins. While **Start Date** is required, **Start Time** is optional.

End Date and **End Time:** The **End Date** is the date on which this class or class period begins. If the class occurs only once, **End Date** is optional. If this class is a recurring class period, **End Date** will establish the completion date. **End Time** is optional.

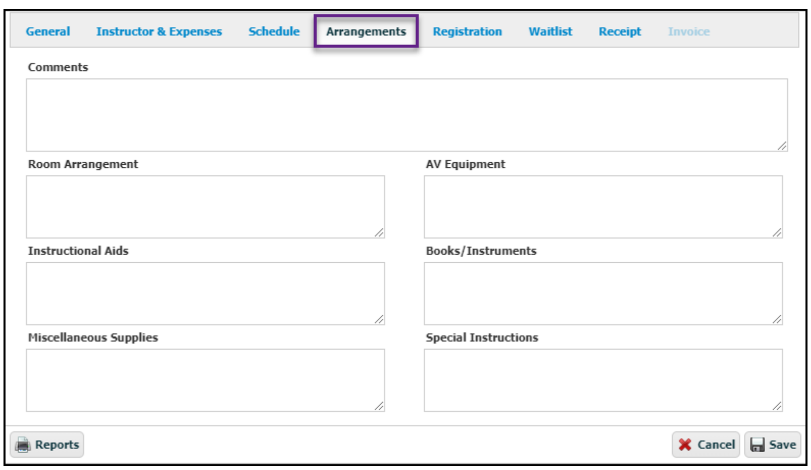
Schedule Description: Use this field to enter a *brief text* description that will be visible on the **Class Details** page of the Web Store. Information in the Schedule Description automatically prints on customers' receipts upon completing registration in the Web Store.

The **Globe** button in the upper right-hand corner copies a direct link to the **Class Details** page on the Web Store to the user's clipboard. This link may then be pasted into a new tab's address bar (**Ctrl + V** or **Cmd + V**) or shared with customers.



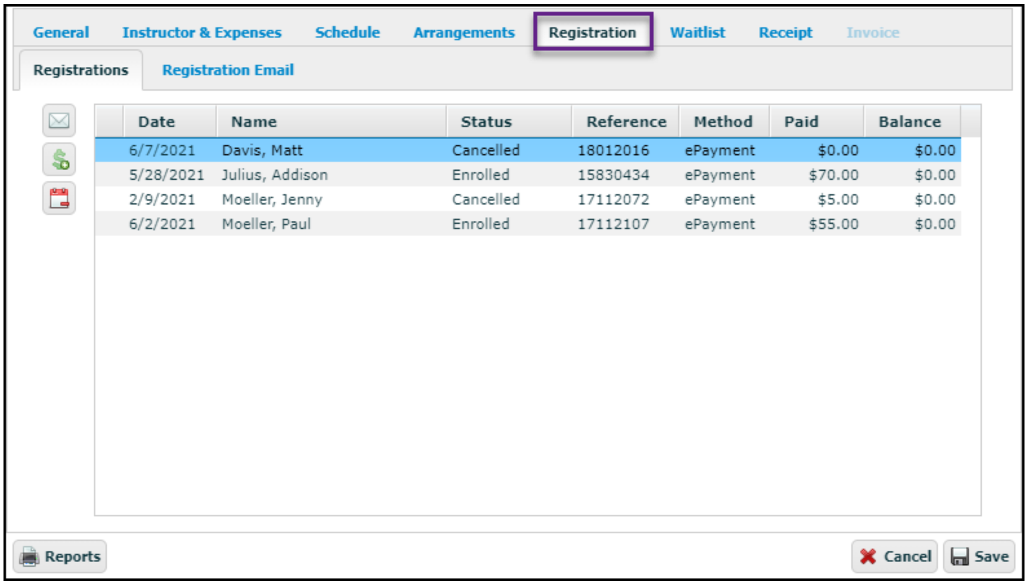
Arrangements Tab

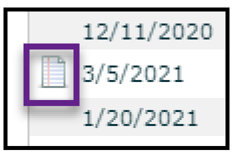
On the **Arrangements** tab, add specific instructions for each class which can then be printed out using the **Facility Setup** report.



Registration Tab

The **Registration** tab lists every student who is currently registered for the class, as well as every student who has been cancelled out of it.





Notes: A **Note** icon next to a registration means that a note has been added to the registration. To view the note, double-click into the student's registration and then click on the **Notes & Emails** tab.

Date: The **Date** field lists when the student registered.

Name: The **Name** field lists the student's name.

Status: The **Status** field denotes whether the student is **Enrolled** or **Cancelled**.

Reference: The **Reference** field lists the reference number associated with either the most recently processed ePayment or the very first payment made on that registration. If the payment method was an ePayment, the reference number will be the same as the RevTrak **Order ID** in the RevTrak **Portal**; the only time this will not be the case is if the reference number was entered manually. If the payment method was a check, the reference number will be the check number. If the payment method was cash, there will generally be no reference number.

Method: The **Method** field identifies the most recent method of payment associated with the registration.

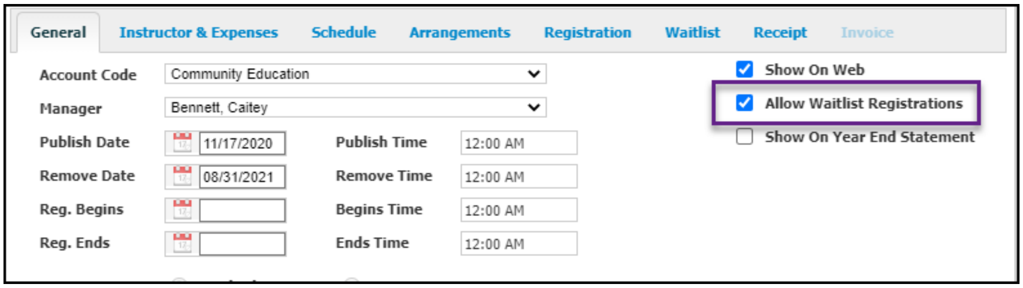
Paid: The **Paid** field lists the total amount that has been paid on the registration.

Balance: The **Balance** field lists the total amount due on a registration. If the balance is ***positive***, the student owes that amount; if it is ***negative***, the student's account has a credit of that amount.

Email: The **Email** field allows users to create an email message that will be sent to each registrant after they have registered for this class. The **Email** option may be used to send out a supply list, a "Thank you for registering" note, or any other information registrants may need to be aware of.

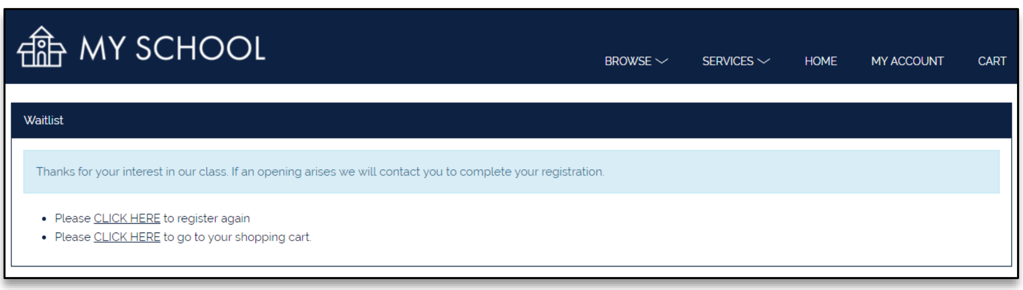
Waitlist Tab

To allow waitlist registrations after the class limit has been reached, check the **Allow Waitlist Registrations** box on the class' **General** tab.



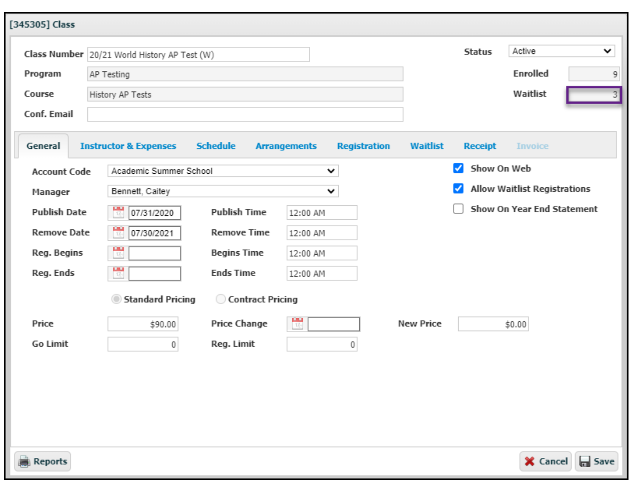
When this box is checked, registrants will be prompted to register to the waitlist when the class is already full.

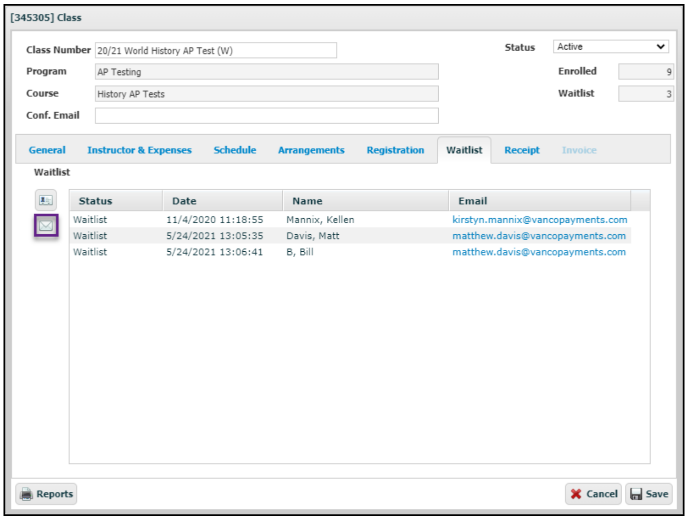
During registration, registrants will see the message at left when a class is full.



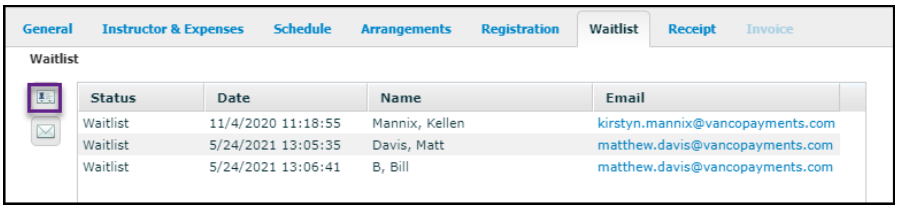
The registrant will go through the registration process as they would with any other registration. No payment is processed on a Waitlist entry. Once the registration has been completed, the registrant will receive the message at left.

The waitlisted registration will now be visible on the class' **Waitlist** tab. Note the **Waitlist** count in the upper right-hand corner of the **Class** window, which lists the number of registrations that are on the waitlist.

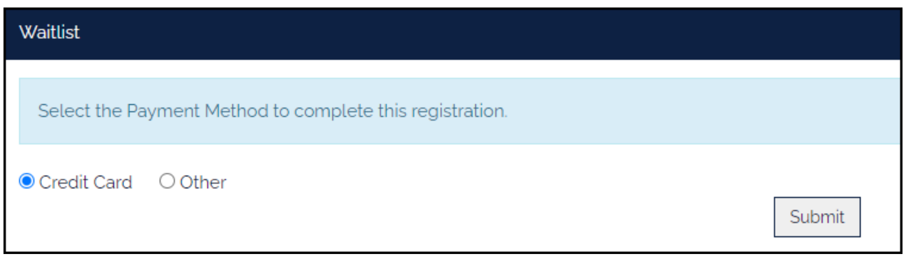




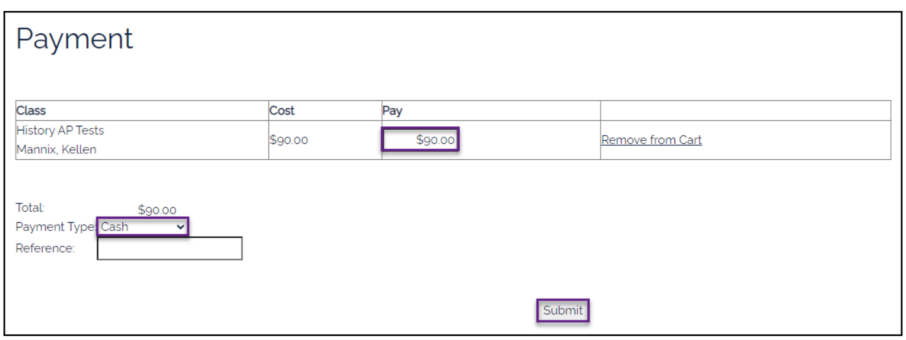
To email those on the waitlist, click the **Email** button to the left of the waitlist. The addresses will be blind copied into an email message. Users then complete the details of the email message and hit **Send** once complete. The record of this email resides in the User's email inbox.



To change a registration's status from **Waitlist** to **Enrolled**, select the registration from the waitlist and click the **Register** button to the left of the **Waitlist**. Once this button is clicked, a new tab will open in the browser where payment may be finalized.



If paying by **Credit Card**, click **Submit**; the registration will be added to the **Shopping Cart** where the user makes payment by reviewing the order and then completing the checkout process. Close the Checkout tab, and then **Save** in the **Class Waitlist.**



If the registrant is paying the full amount by **Cash**, **Check**, **echeck, Money Order**, **Subsidy**, **Voucher**, or **Other**, select **Other** and click **Submit**. Select the payment type from the **Payment Type** drop-down menu, and enter a reference number in the **Reference** field as needed. **Submit** to complete. Close the Checkout tab, and then **Save** in the **Class Waitlist**.

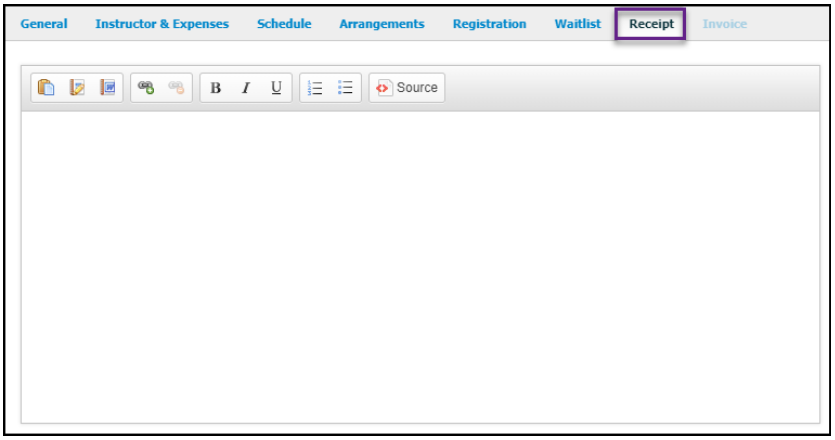
If the registrant is only making a partial payment, enter the partial payment amount in the **Pay** field. Verify that the **Total** field is updated with the new amount before selecting **Submit**. Close the Checkout tab, and then **Save** in the **Class Waitlist.**

If no payment is being made at the time of the Waitlist transfer, select Other, then **Submit**. Enter $0 in the **Pay** field, select Other as **Payment Type**, then Submit.

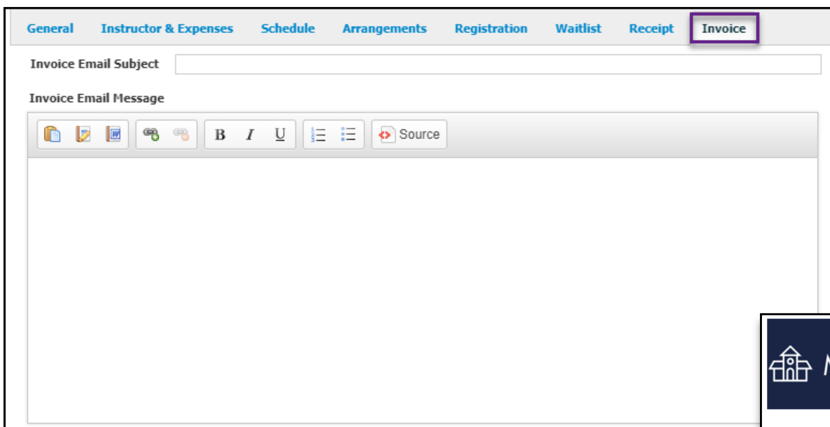
Receipt and Invoice Tabs

The options on the **Receipt** tab will vary depending on whether the class has Standard or Contract pricing.

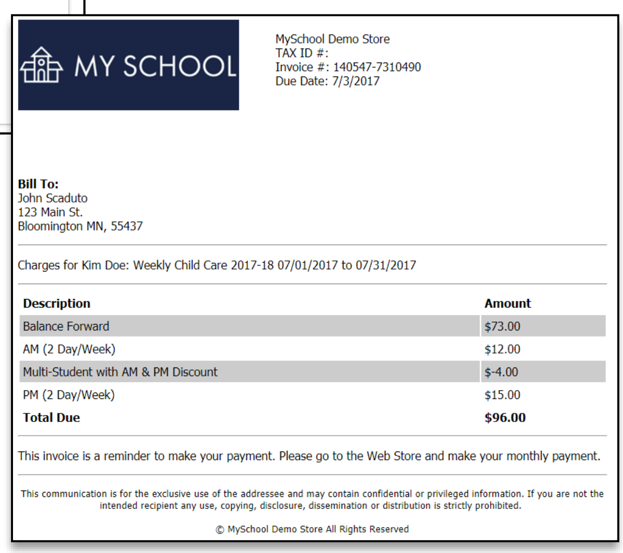
If the class is set up for **Standard Pricing**, users may create a receipt message. If the class is set up for **Contract Pricing**, users may modify aspects of the invoice that the system will send out when invoicing for the class.



Receipt: The **Receipt** tab provides space to create a message that will appear on a receipt generated from a walk-in registration.



Invoice Email Subject: The **Invoice Email Subject** is the subject line on the email that sends invoices to customers. Enter a subject and **Save**. Every subsequent invoice will use that subject by default until the message is modified.


MY SCHOOL

MySchool Demo Store
TAX ID #:
Invoice #: 140547-7310490
Due Date: 7/3/2017

Bill To:
John Scaduto
123 Main St.
Bloomington MN, 55437

Charges for Kim Doe: Weekly Child Care 2017-18 07/01/2017 to 07/31/2017

Description	Amount
Balance Forward	$73.00
AM (2 Day/Week)	$12.00
Multi-Student with AM & PM Discount	$-4.00
PM (2 Day/Week)	$15.00
Total Due	**$96.00**

This invoice is a reminder to make your payment. Please go to the Web Store and make your monthly payment.

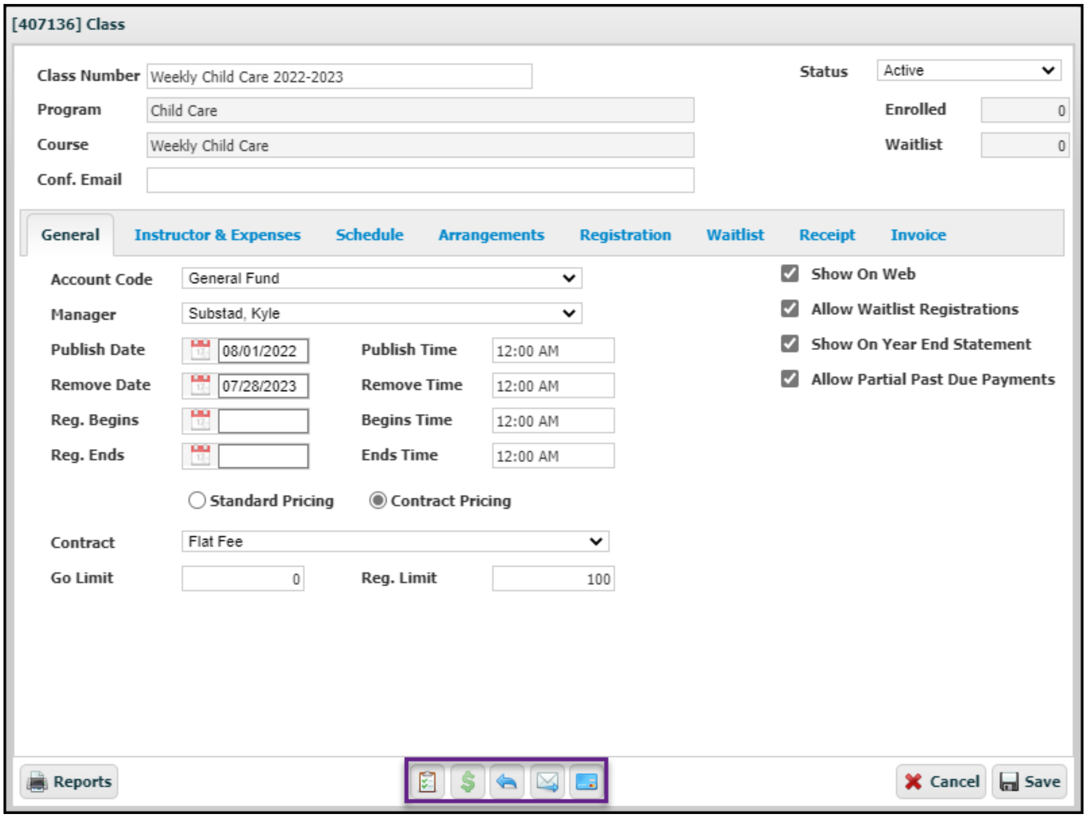
This communication is for the exclusive use of the addressee and may contain confidential or privileged information. If you are not the intended recipient any use, copying, disclosure, dissemination or distribution is strictly prohibited.

© MySchool Demo Store All Rights Reserved

Invoice Email Message: The **Invoice Email Message** field provides space to attach a message in invoices. Add an email message and **Save**. The message appears on invoices below the billing information. Every subsequent invoice will include that message by default until the message is modified.

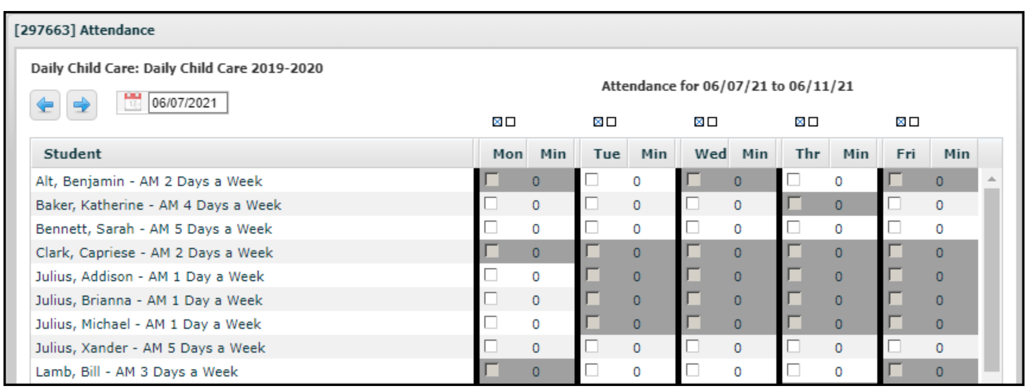
Contract Pricing Classes

Contract Pricing is used for classes with recurring payments over time. RegWerks Contracts allow billing for days, weeks, and months attended. Contracts are assigned to classes and define the rates and attendance schedule for each registration. Once **Contract Pricing** has been chosen as the pricing structure for a class and registrations have been processed for the class, RegWerks provides various options for contract class management.



Attendance Button

The **Attendance** button ( ) allows users to take attendance for a contract class.



Clicking the button opens the **Attendance** screen, which lists every registration for the class along with the segment for which the student is registered. If a student is registered for multiple segments, he/she will be listed as many times as there are segments.

To take attendance, check the boxes that correspond to the days on which the student attended. Users may also notate which students were picked up late. If the contract's **Late Pickup Fee** is a **Flat Fee**, there will be a checkbox for late pickup. If the **Late Pickup Fee** is a **Per Minute Fee**, there will be a field in which to enter the number of minutes.

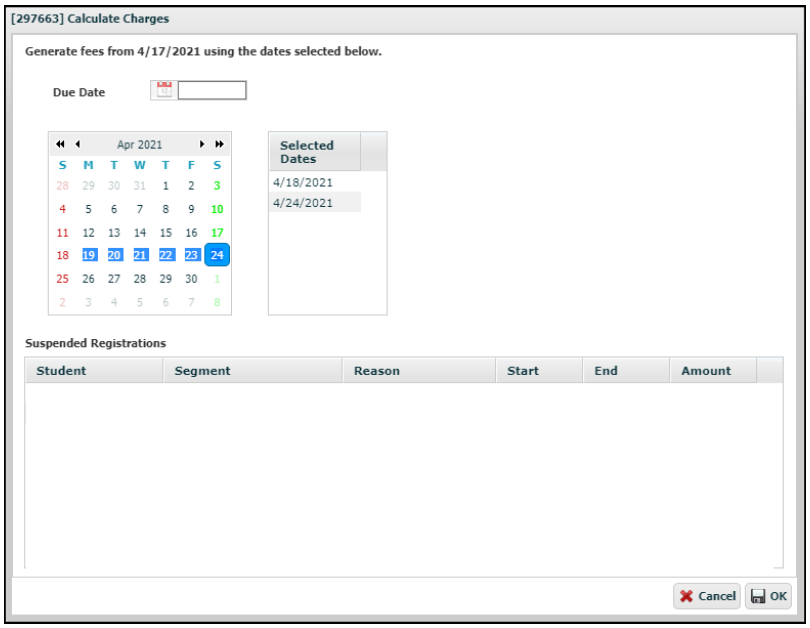
The **Checked Box** and **Empty Box** buttons along the top of the **Attendance** window allow users to check or uncheck every attendance for a given day that account holders selected at the time of registration or for a given day that account holders selected in the **Calendar** on the **Parent Portal**. If a student is not scheduled to attend a day, the corresponding **Attendance** box will not be checked.

Once a week has been invoiced, it is no longer possible to uncheck past attendances for any registrations. If a day was not checked prior to invoicing, users can still check that day so that it will appear on the next invoice.

Calculate Charges Button

The **Calculate Charges** button ( ) calculates the charges for the registrations based on their contract selections and will create an Excel spreadsheet with a student-by-student list of current charges for review.

Daily Charges

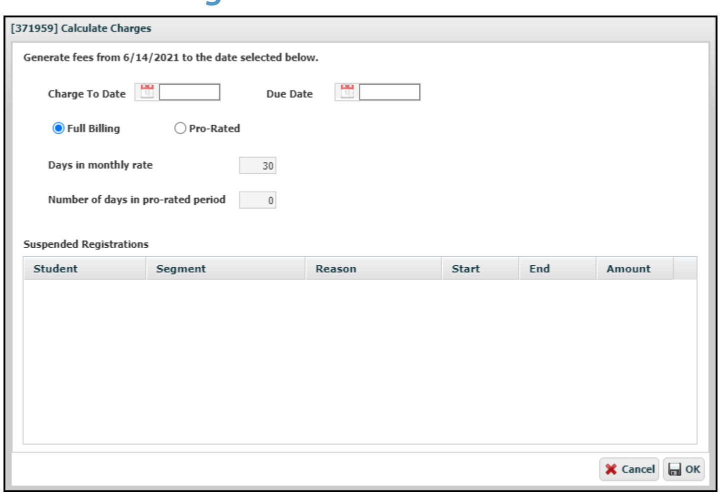


For contracts that are set up for daily billing, the **Daily Charge Processing** screen prompts users to select the specific days to invoice. To do this, users hold either the **Ctrl** key (Windows) or **Cmd** key (Mac) and then click on the chosen days.

Groups of days are selected by holding down the **Shift** key while clicking on an end date. If a group of days are selected and a specific one must be deselected, hold the **Ctrl** or **Cmd** key and click on that day.

The **Due Date** field establishes a due date for the invoice. If there is a late fee assigned to the contract, the late fee is automatically charged to any invoice paid after the due date.

Flat Fee Charges



For contracts that are set up for flat fee billing, the **Pre-Pay Processing** screen prompts users to select the end date of the billing period . The system will remember the previous end date (or, when billing for the first time, it will list the start date of the contract) and generates fees for that time period.

Rates are charged either as a **Full Month** or at a **Pro-Rated** rate. When the **Pro-Rated** button is selected, users must set the **Days in monthly rate** along with the **Number of days in pro-rated period**.

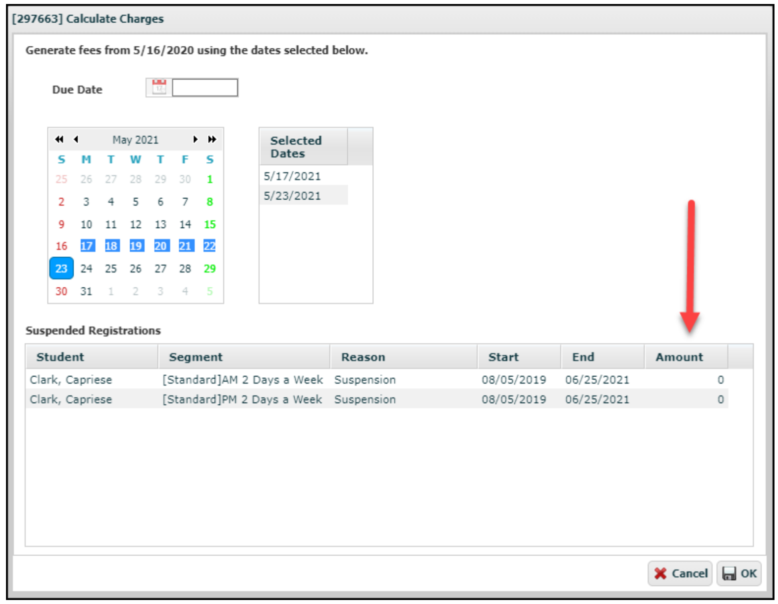
The **Due Date** field establishes a due date for the invoice. If there is a late fee assigned to the contract, the late fee is automatically charged to any invoice paid after the due date.

Drop In Charges

For contracts that are set up for the drop in billing, the system charges all registrations that have attended more days than they have purchased. If a registrant has not attended more days than they have purchased, he/she will not be invoiced.

Suspended Registrations

Registrations may be suspended within each individual registration. When calculating the charges for a class, any students whose registrations are suspended will be listed in the **Suspended Registrations** table along with their contract segments that are suspended. If a registration is suspended for more than one segment, each segment will be listed separately. This table also lists the reason and time frame for the suspension. When users wish to assess a partial fee for the invoice period, the partial fee is entered manually into the **Amount** column.

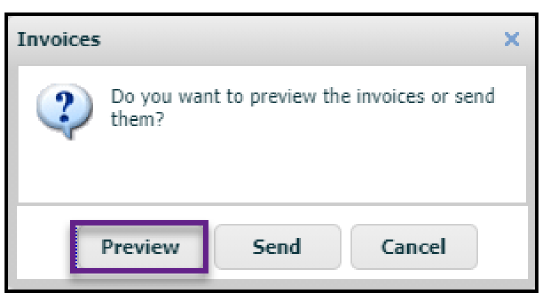


Undo Charges Button

The **Undo Charges** button () allows users to undo calculated charges ***before*** sending the invoices.

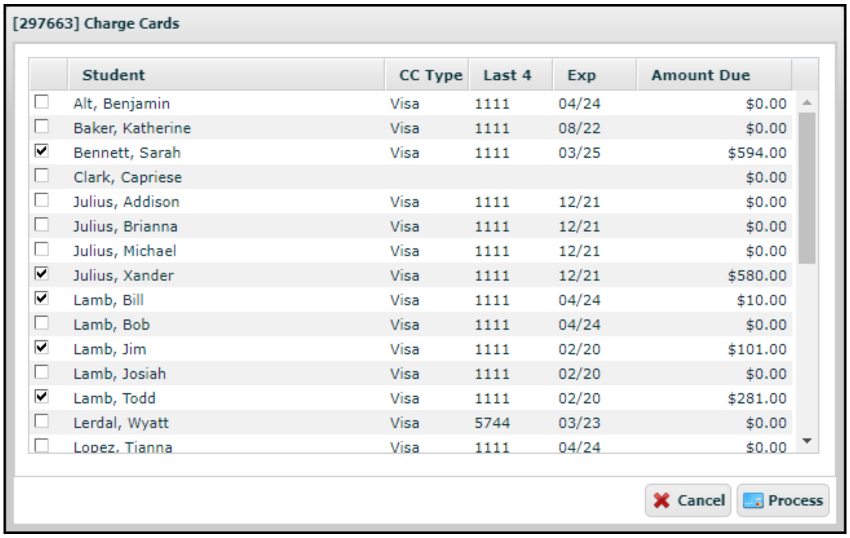
Send Invoices Button

The invoicing process is not completed until the invoices have been emailed to the customers. The **Send Invoices** button () allows users to preview the invoices and check for accuracy. Hard copies may be printed during preview, with page breaks between each invoice. Once Invoices have been emailed to customers, users cannot undo calculate charges for that batch of invoices.



Charge Cards Button

The **Charge Cards** button ( ) completes a batch process of all credit cards in a class for participants who have given permission to charge their cards. Click on the **Charge Cards** button. To designate which cards to process, check the box in front of the students' names in the **Charge Cards** list. Select **OK** and confirm on the next screen a charge to these designated credit cards for the fees on the registrations. The system will then process payment on the selected cards.


[297663] Charge Cards

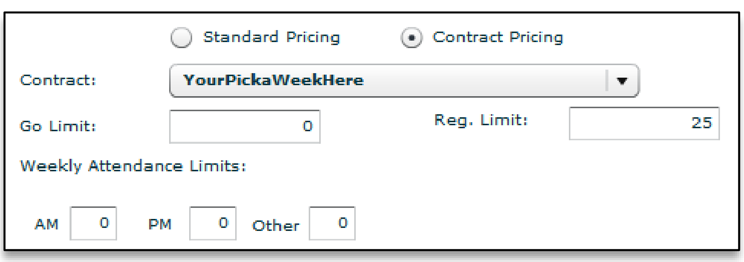
	Student	CC Type	Last 4	Exp	Amount Due
☐	Alt, Benjamin	Visa	1111	04/24	$0.00
☐	Baker, Katherine	Visa	1111	08/22	$0.00
☑	Bennett, Sarah	Visa	1111	03/25	$594.00
☐	Clark, Capriese				$0.00
☐	Julius, Addison	Visa	1111	12/21	$0.00
☐	Julius, Brianna	Visa	1111	12/21	$0.00
☐	Julius, Michael	Visa	1111	12/21	$0.00
☑	Julius, Xander	Visa	1111	12/21	$580.00
☑	Lamb, Bill	Visa	1111	04/24	$10.00
☐	Lamb, Bob	Visa	1111	04/24	$0.00
☑	Lamb, Jim	Visa	1111	02/20	$101.00
☐	Lamb, Josiah	Visa	1111	02/20	$0.00
☑	Lamb, Todd	Visa	1111	02/20	$281.00
☐	Lerdal, Wyatt	Visa	5744	03/23	$0.00
☐	Lopez, Tianna	Visa	1111	04/24	$0.00

Cancel Process

The cards that were successfully processed will show a $0.00 balance on the **Registration** tab after saving out of the class. For cards that were not successfully processed, run the **Students with Balance and CC Message** report to see why payment failed.

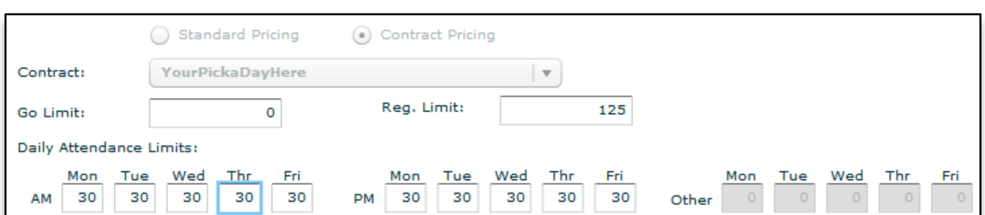
Attendance Limits Feature

If a class uses a Pick-A-Day or Pick-A-Week contract, there is an additional feature available at the **Class** level called **Attendance Limits** that allows users to set a limit on the number of students that can attend during a given time slot. When a limit is entered there, the checkbox for the time slot on the **Calendar** will be grayed out as soon as the limit is reached for that time slot.



If the class is a weekly class, users have the option to limit the number of weekly attendances during the **AM**, **PM**, and **Other** time slots.

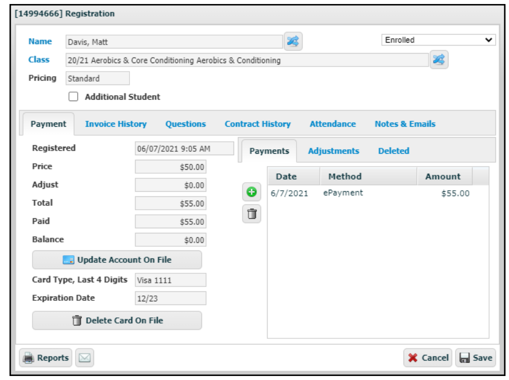
If the class is a daily class, users have the option to limit the number of attendances on a given day for those same time slots.

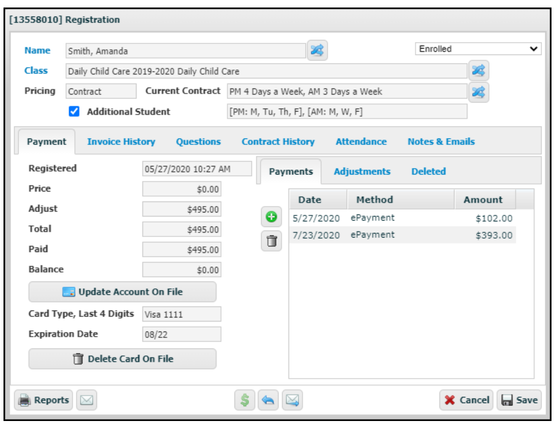


Registrations

To access a registration, navigate to the class, click on the **Registration** tab, and then double-click into the registration on the list. Alternatively, go to the **Person** menu option, click into the student, and double-click into the registration for the desired class.

If the person is registered for a standard class, a **Registration** window like the one on the right will open.

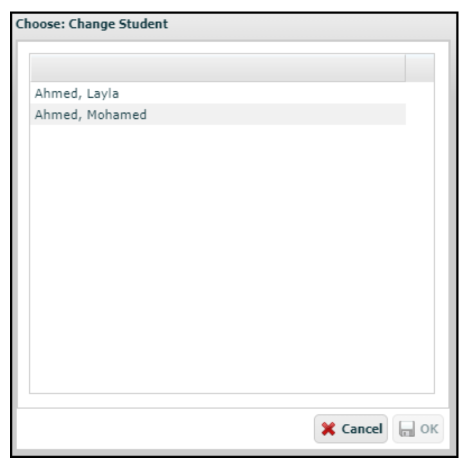


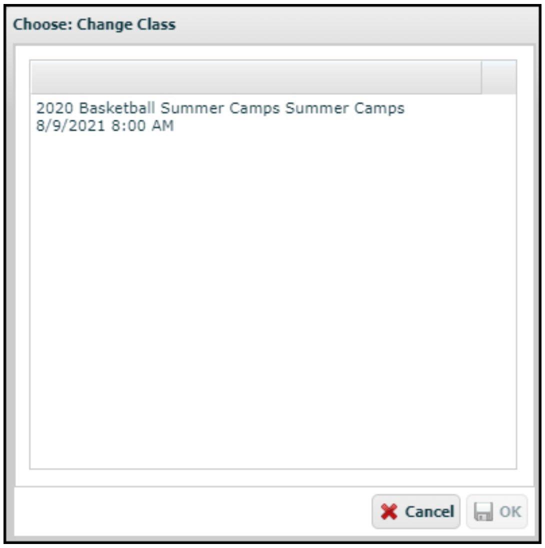


If the person is registered for a contract class, a **Registration** window like the one on the left will open. This window displays the type of contract and days for which the student is registered, as well as the **Calculate Charges**, **Undo Charges**, and **Send Invoices** buttons.

Transferring a Registration

Registrations can be transferred from one account member to another on the same account. To switch a registration between account members, click the **Switch Arrows** ( ) beside the **Name** field. This brings up a list of all members on the account. To move the registration, select the name of the intended registrant and click the **OK** button.



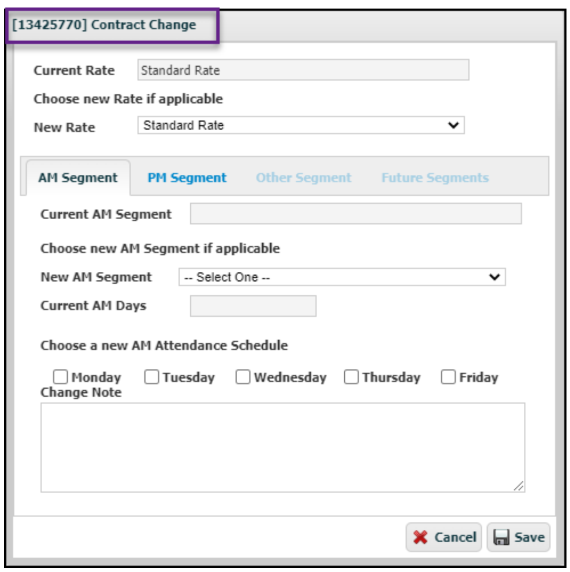


Registrants for standard classes can be transferred from one class to another within the same course. To transfer a registrant, click the **Switch Arrows** ( ) beside the **Class** field. This brings up a list of all classes in the course. To move the registrant, select the name of the new class and click the **OK** button.

Changing a Contract

When working with contract class registrations, users may change the contract rate or segment for which the student is registered. It is recommended that all contract changes align with invoice periods. In other words, make contract changes just prior to billing, so the change date and start date for billing are identical.

To modify a registration's contract, click the **Switch Arrows** ( ) beside the **Current Contract** field. In the **Contract Change** window, the current contract information is listed.



Select the new rate from the **New Rate** drop-down menu.

If the rate is remaining the same but the segment is changing, navigate to the appropriate **Segment** tab and choose a new segment from the **New Segment** drop-down menu. Registrations can only have one **AM**, **PM**, and **Other** segment at a time. Once a new segment is selected, choose the days for a new attendance schedule.

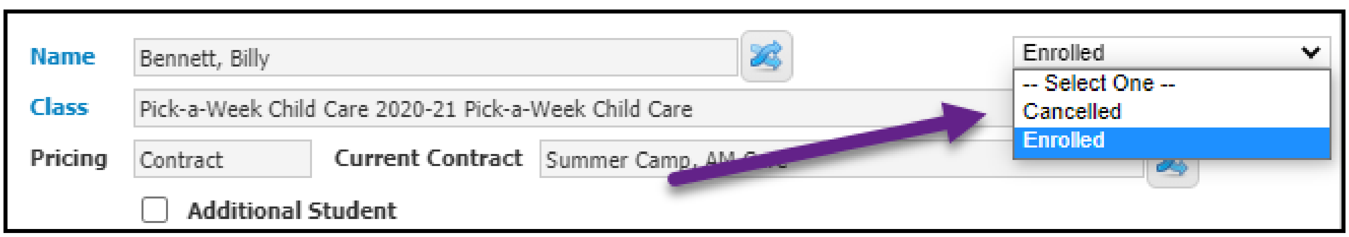
If the attendance schedule is the only item that needs to change, select the days for the new attendance schedule. Enter internal notes as needed in the **Change Note** field, and **Save**.

Once changes are **Saved** on the **Contract Change** screen, users will be prompted to enter a **Date** on which the change will take effect. In the **Select Date** window which opens, select the date on which the contract change will be effective. It is recommended that all contract changes align with invoicing periods: As the change date is likely a future date, the change will be listed under the **Future Segments** tab and will not take effect until that date arrives. This allows users to assess fees for a partial month under each contract segment by adding a manual adjustment on the Adjustments tab. During the next billing cycle, the system will invoice based on both manual adjustments (prorated fees) and from new contract segments (new fees).

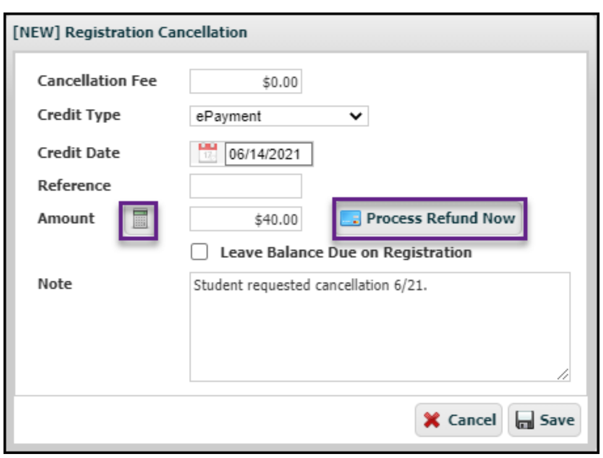
Additional Student A registration can be marked as an additional student to provide discount pricing on Contract Pricing classes. At the time of registration, the system will assign the Additional Student status to any child that is registered after the first registration for a family is completed. By checking the checkbox next to **Additional Student,** the registration qualifies for the Multi-Student Discount on the contract.

Cancelling a Registration

To cancel a registration, select **Cancelled** from the drop-down menu in the upper right-hand corner of the **Registration** window. Please note that cancelled registrations cannot be reversed.



The user will be prompted to confirm the cancellation. Select **OK**.



In the **Registration Cancellation** window, the **Credit Date** field will be populated automatically. Enter any applicable cancellation fee or withhold any portion of the payment by entering that amount in the **Cancellation Fee** field. Next, select the credit type from the **Credit Type** drop-down menu.

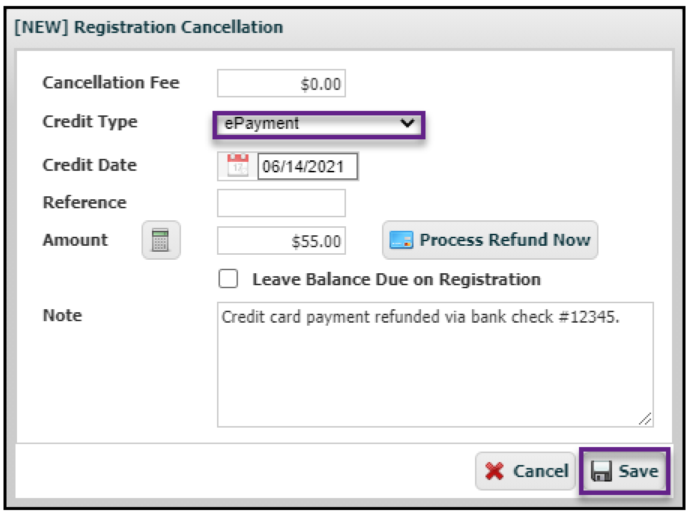
When refunding an ePayment, choose **ePayment**. For Standard Priced classes, click the **Calculator,** and the system will calculate the refund amount. The **Amount** of any cancellation refund must be a *positive* number (i.e. $40). A Contract Class cancellation Amount will be $0 unless there is a partial refund due; this allows families to report childcare expenses on tax returns.

For ePayment refunds, leave the **Reference** field blank as it will be automatically populated with a RevTrak **Order ID** once the refund is processed. Enter an explanation for the refund in the **Note** field as needed.

When the user has the necessary user permissions in RegWerks to issue refunds, the **Process Refund Now** button will appear, allowing the user to process the credit card or eCheck refund. **NOTE:** During the cancellation process, the Refund Amount is a *positive* number.

Once the user clicks on the **Process Refund Now** button, a confirmation window will open. Click **OK** to authorize RevTrak to refund the credit card or eCheck. Once the refund has been processed, a receipt will be sent to the customer, and a confirmation window will open that confirms the refund has been successfully completed. Select **OK**, and the cancellation will be completed.

Users will follow slightly different instructions for cancellations in which an ePayment must be refunded without directly processing the refund to the credit card or echeck (i.e. refund via paper check). Begin notating this type of refund by selecting ePayment as **Credit Type**, as well by completing all other necessary information. Rather than selecting Process Refund Now, click **Save.** This notates the refund without processing the money to the original payment method. A prompt will appear to confirm the notation of this refund. Select **Yes**.

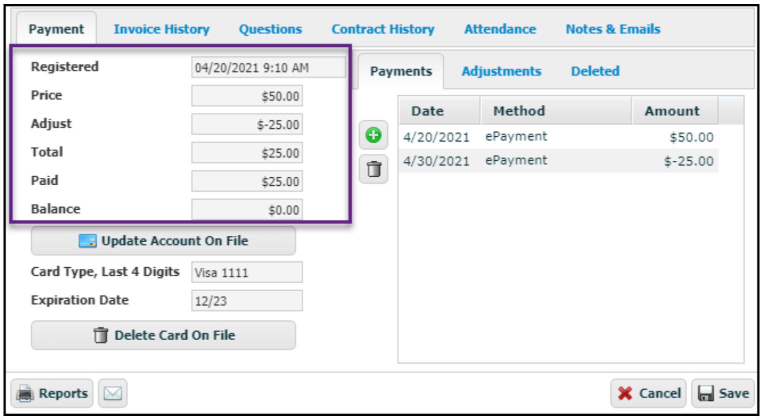


When refunding any other form of payment as part of the cancellation process, select the corresponding payment method from the **Credit Type** drop-down menu, enter the reference number (if applicable), click the calculator, and enter a note (if applicable). Click **Save** to complete the cancellation and corresponding refund.

The registration's status will now be **Cancelled**, and the refund amount will be represented by a negative payment and negative adjustment to bring the balance to $0.00. **Save** out of the registration to ensure the system syncs correctly. At this point, the participant may only be actively enrolled in this same class by having a new registration completed in this same class.

Payment Tab

The **Payment** tab contains details related to payments and charges which are associated with the given registration.



Overview Area

The **Overview** area on the left-hand side of the **Payment** tab contains various fields that prove an overview at-a-glance of the student's registration and payment history.

Registered: The **Registered** field lists the date and time when the registration was completed in the Web Store.

Price: The **Price** field shows the price of the class.

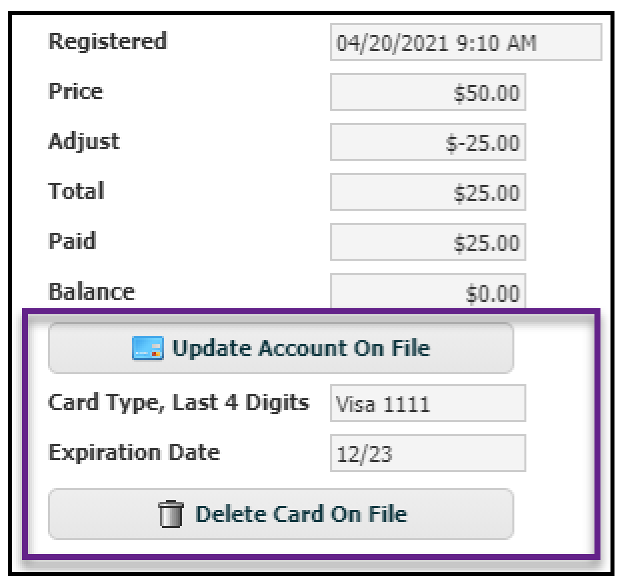
Adjust: The **Adjust** field shows the total amount of adjustments that have been made to the cost of the class. If this number is positive, the price of the class has ultimately been increased by that amount. If it is negative, the price of the class has ultimately been reduced by that amount.

Total: The **Total** field shows the total cost of the class, which is the sum of the **Price** and **Adjust** fields.

Paid: The **Paid** field shows the total amount that the registrant has paid. If this number is positive, the registrant has paid that amount. If it is negative, the registrant has a credit for that amount.

Balance: The **Balance** field shows the balance for the registration. If this number is positive, the registrant still owes that amount. If the number is negative, the registrant has a credit for that amount and may require a refund.

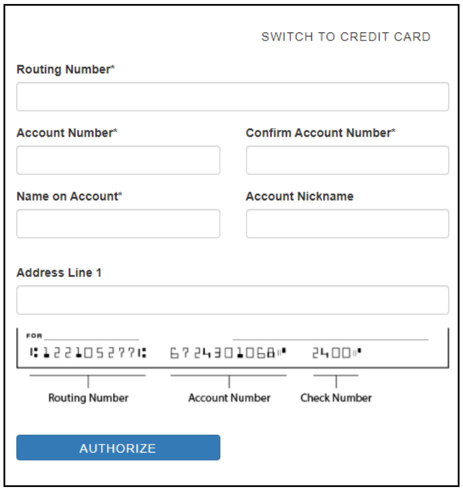
Saved Payment Method Area



The **Saved Payment Method** area on the bottom left-hand side of the **Payment** tab displays the credit card, debit card, or eCheck that can be charged or refunded in association with this registration. The RegWerks system never actually stores a registrant's full debit card, credit card, or eCheck information, but rather stores a "token" that can then be used to charge or refund the payment method.

There are multiple ways to save a card or eCheck to an account. The most common way a payment method gets added to an account is when a registrant checks the **Save this account** box when making an ePayment through the Web Store.

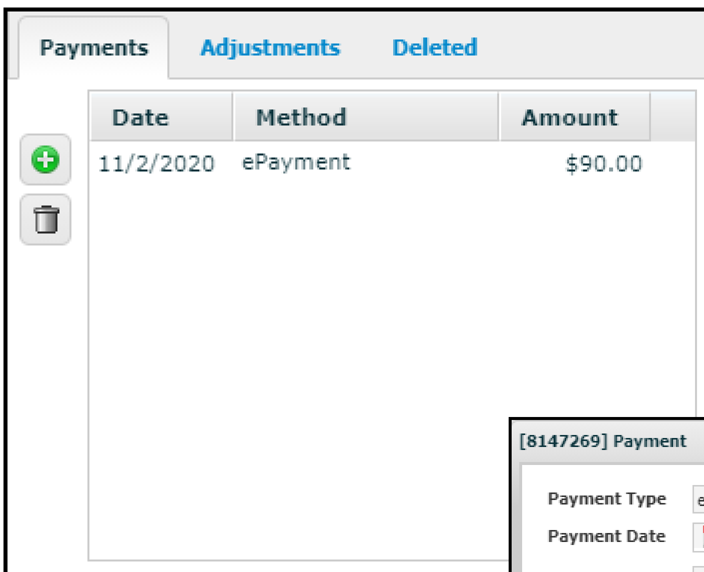
Another method for adding a card or eCheck to an account is for the registrant to log into their account, navigate to the **Parent Portal**, and update the payment method on file for a particular registration.

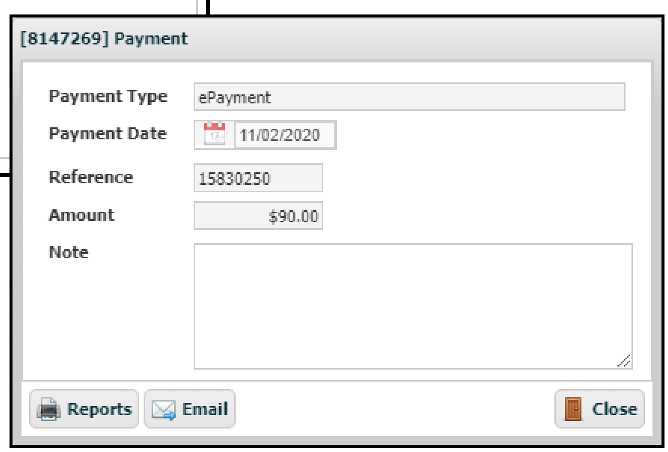


In RegWerks, the primary way to add a payment method to a registration is by clicking the **Update Account On File** button. When the **Payment Authorization** window opens, users enter the required eCheck information. To update a debit or credit card, click the **Switch to Credit Card** button and enter the necessary information. Click **Authorize** to complete the update of payment method. This process only authorizes the payment method; no charges have been taken in.

Payments Tab

The **Payments** tab lists all transactions (payments and refunds) made on a registration. Positive entries are payments. Negative entries are refunds.

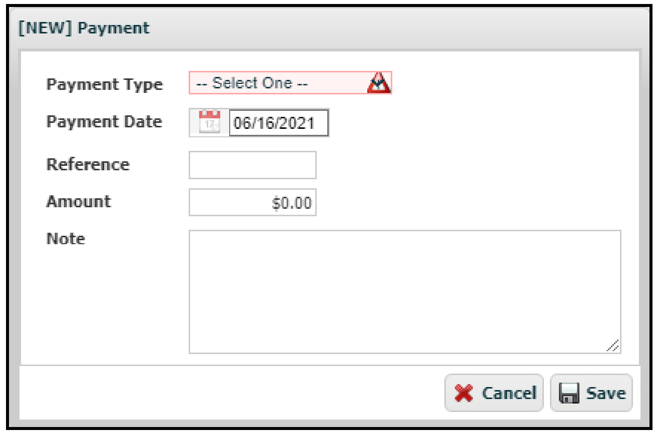




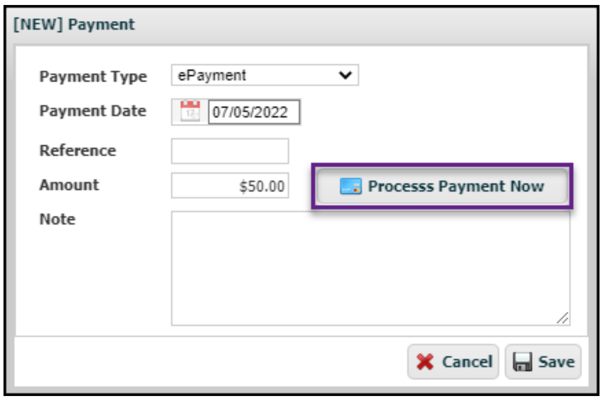
To obtain more information on an item, double-click on it to open the full item in a new window.

Adding a Payment

Only those users with proper credentials in RegWerks may process transactions to credit/debit cards and echecks.



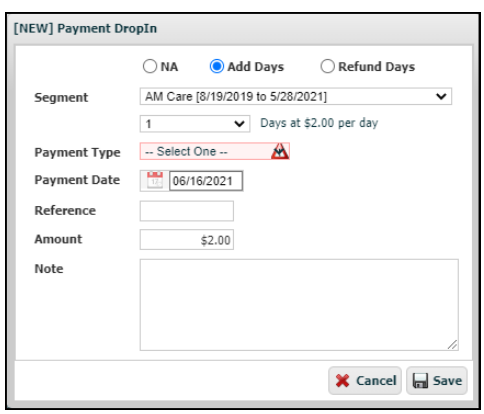
To record an ePayment, click the green **Plus Sign** button on the **Payments** tab, select **ePayment** from the **Payment Type** drop-down menu, and fill out the fields on the **Payment** screen. Leave the **Reference** field blank, as it will auto-populate with a RevTrak **Order ID** after the payment is processed. Enter the **Amount** and add notes for internal reference.



The **Process Payment Now** button will appear. Click the **Process Payment Now** button to charge the registrant's card or eCheck to finish the payment entry process.

To record any other kind of payment, click the green **Plus Sign** button and fill out the various fields where applicable. When recording a check payment, enter the check number into the **Reference** field. **Save** once complete.

When adding a payment for a drop-in class, the **Payment DropIn** window offers the option to add days to the registration. When adding days as part of the payment process, users must select the segment followed by the number of days to be added. The system will automatically calculate the amount; finish the payment entry process as with any other payment.



Adding a Refund

The process for processing or recording a refund has the same steps as entering a payment with the caveat that a refund **Amount** must include a minus sign to make it a *negative* number (i.e. -$50). Refunds are also processed during the cancellation process; when processed as part of the cancellation process, the **Amount** must be a *positive* number ($50).

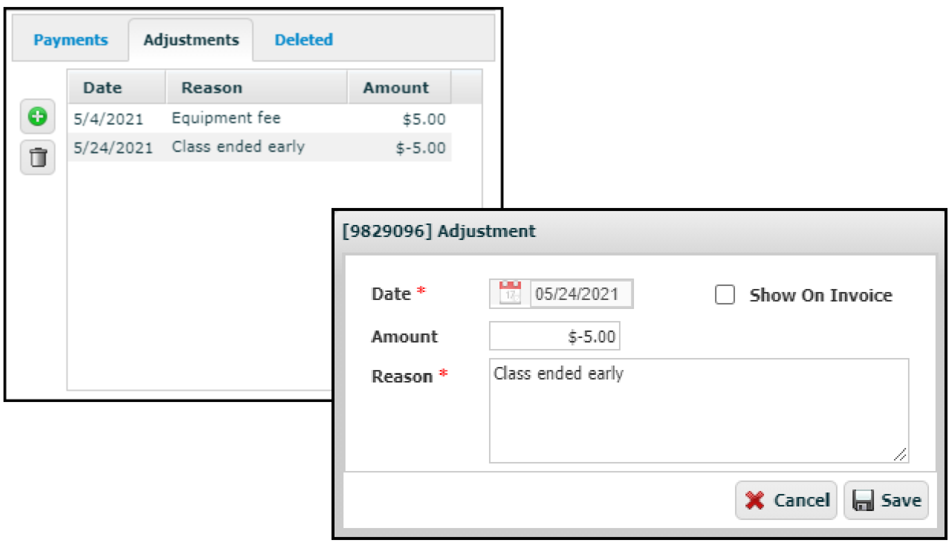
ePayment refunds can only process back to the original payment method (i.e. the specific debit/credit card, or as a bank check for offline refunds). If the original epayment method is unavailable, then the refund will be issued as an offline refund (i.e. bank check, credit for a future class, etc).

Deleting a Payment or Refund

To delete a payment or refund, click once on the payment or refund, and then click on the **Trash Can** button. The user will then be prompted to enter the reason for the deletion. The payment will be moved to the **Deleted** tab. RegWerks does not allow users to delete ePayment transactions (payment or refund), for reporting purposes.

Adjustments Tab

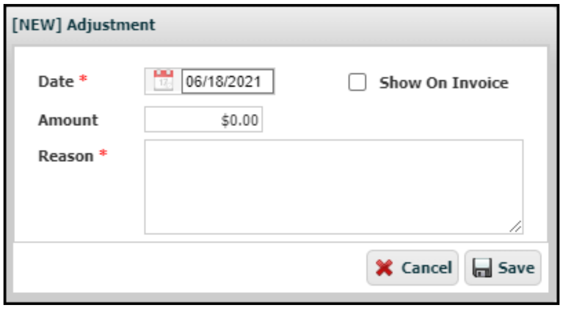
The **Adjustments** tab allows users to record either positive or negative changes to the price of the class for a student. Adjustments essentially raise or lower a student's balance. Double-click on an item to open the full item in a new window.



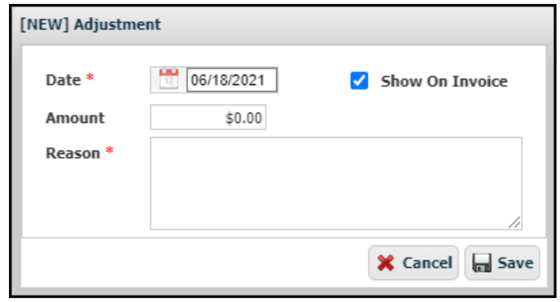
Adding an Adjustment

To add an adjustment, click on the green **Plus Sign** button on the **Adjustments** tab. Enter the amount of the adjustment along with the reason before clicking **Save**. For contract classes, select **Show On Invoice** box if you wish to include the adjustment on the next invoice.

Standard Pricing



Contract Pricing

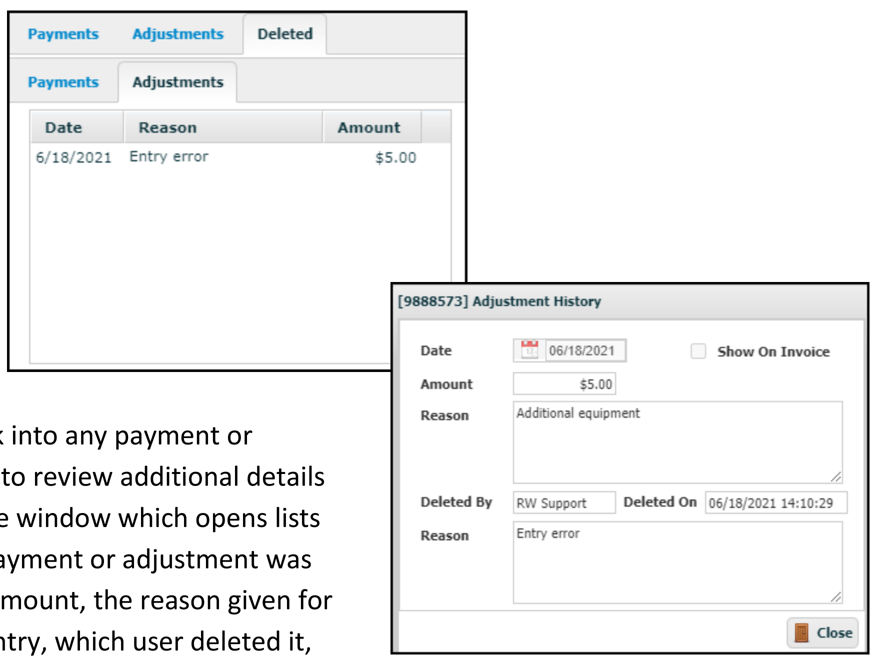


Deleting an Adjustment

To delete an adjustment, click once on the adjustment, then on the **Trash Can** button. The user will then be prompted to enter the reason for the deletion. The adjustments will be moved to the **Deleted** tab. RegWerks does not allow users to delete adjustments that have already been sent out on an invoice.

Deleted Tab

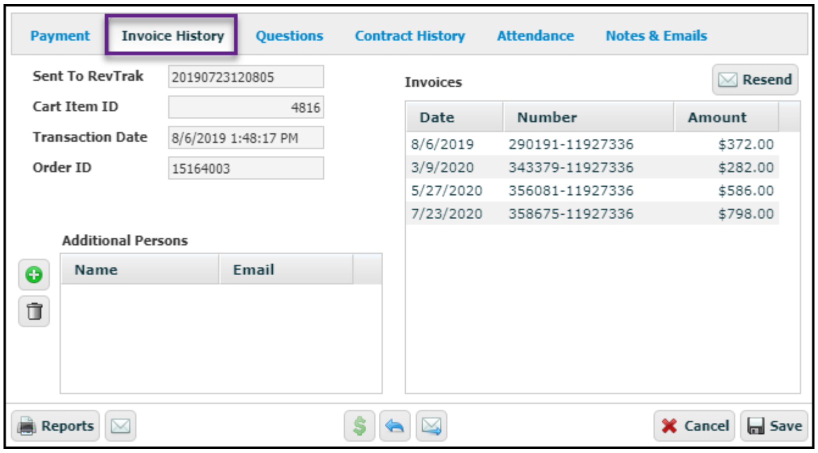
The **Deleted** tab shows a list of every deleted payment and adjustment in the **Payments** and **Adjustments** tabs, respectively.



Double-click into any payment or adjustment to review additional details about it. The window which opens lists when the payment or adjustment was made, the amount, the reason given for the initial entry, which user deleted it, when it was deleted, and what reason was given for the deletion.

Invoice History Tab

The **Invoice History** tab stores the data that is sent and received from RevTrak at the time of registration. It also stores the list of invoices created for a registration on a contract class. Double-click on the invoice to view or print it. To resend an invoice to the registrant, click once on the invoice to highlight it, then click the **Resend** button.

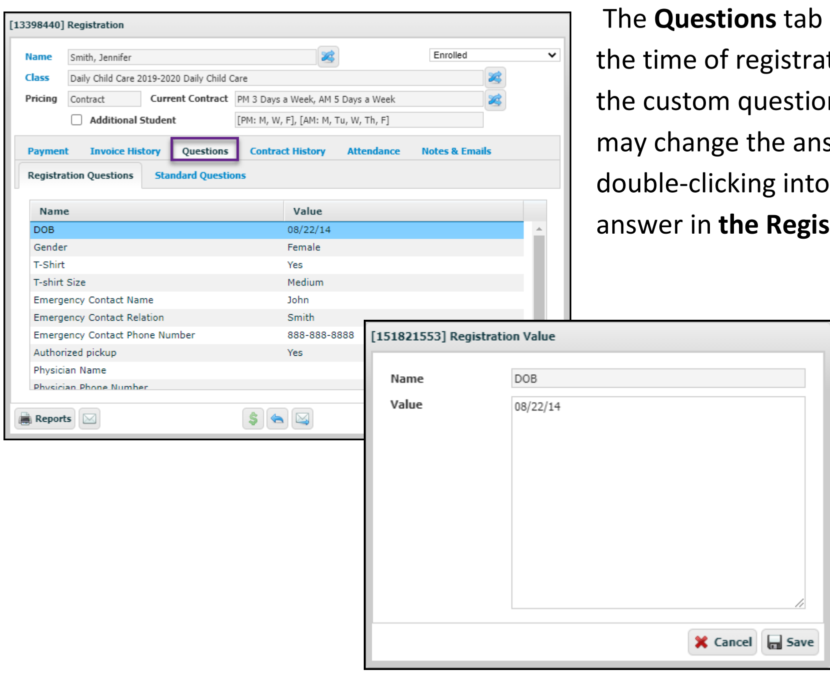


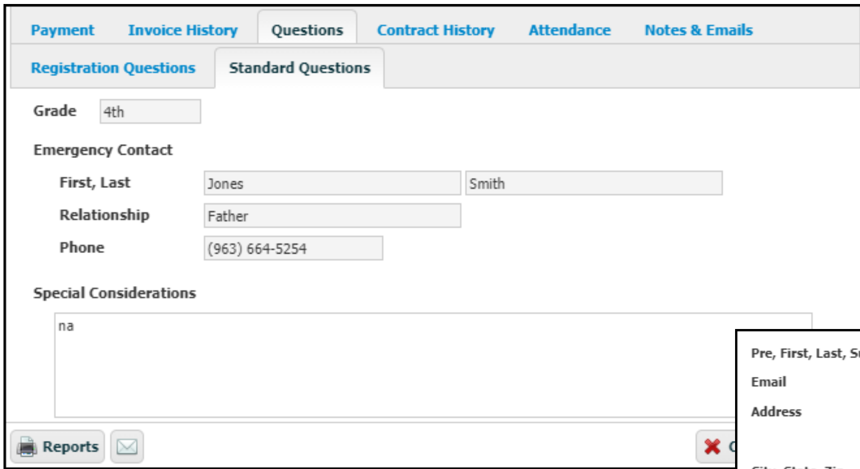
If the account holder wants one or more **Additional Persons** to receive any invoices sent out for this registration, they may be added to the registration by clicking the green **Plus Sign** button. The **NEW Registration Contact** window will open and prompt the user to search for the last name of the Person who needs to be added to the account. The Person must already exist in RegWerks to be added to the registration.

If there is no account for the Person, one may be created using a partial walk-in registration. Start a walk-in registration for any class, create a new account for the additional person, and enter the necessary information. Close the registration browser tab without completing the registration itself. This creates a new Person account which may then be added to the registration as noted above.

Questions Tab

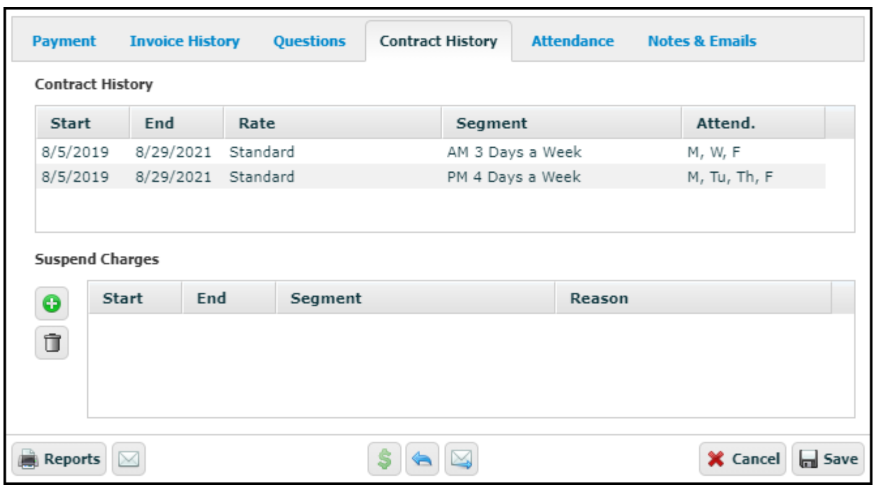
The **Questions** tab lists every answer that the registrant provided at the time of registration. The **Questions** tab also displays answers to the custom questions asked on the question profile. If needed, users may change the answer to a custom question in the **Questions** tab by double-clicking into the **Answer** field and then typing in the new answer in **the Registration Value** window. Click **Save** once complete.



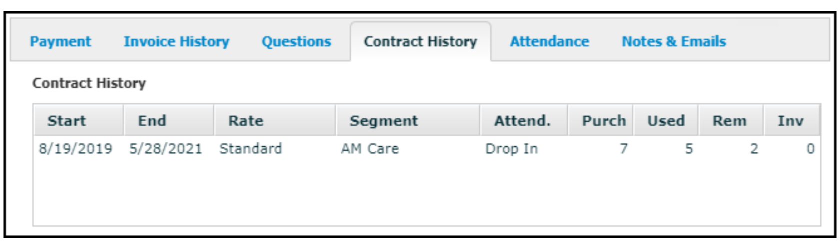


The **Standard Questions** tab lists answers to any standard questions associated with the class at the **Course** level. To change the answer for certain **Standard Questions** (Birthdate, Age, Grade), navigate to the Person's profile, edit, and **Save** once complete.

Contract History Tab

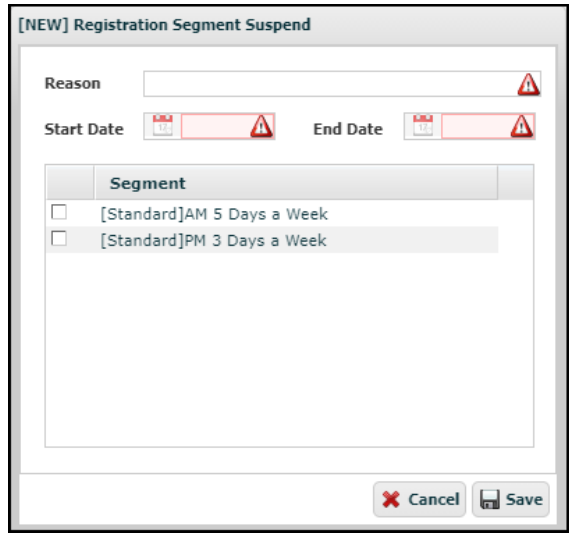


The **Contract History** tab displays a history of all rates and segments associated with a registration for a contract class. When a contract changes, the new contract information appears in the **Contract History** list along with that of the previous contract.



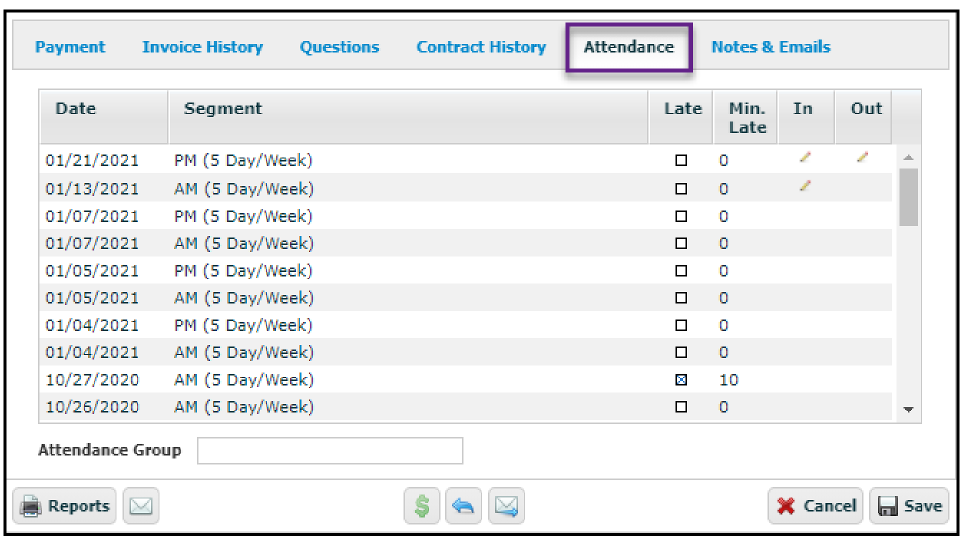
Drop in classes feature four additional columns which track the number of days purchased, used, and remaining, as well as those days for which the registrant has been invoiced. These columns update automatically.

The **Suspend Charges** field lists the periods of time for which the registration has been suspended and will not be charged during invoicing. To suspend a contract, click the green **Plus Sign** button beneath **Suspend Charges**. In the **Suspend Charges** window which appears, enter a reason for the suspension along with a date range. Check the box next to the segment which must be suspended, then Save.



Attendance Tab

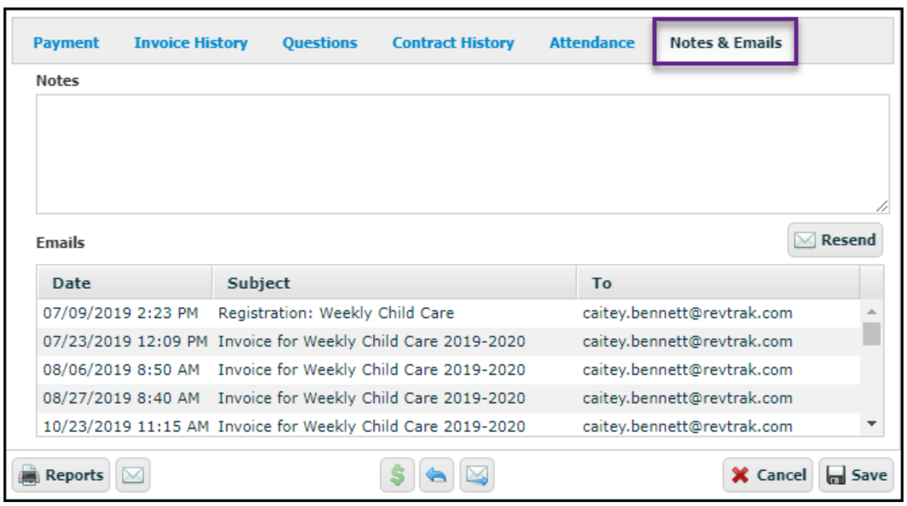
The **Attendance** tab shows the days the registrant attended based on the days selected on the **Assignment Clipboard** at the **Class** level. If the student was picked up late on a certain day, the corresponding box in the **Late** column will be checked; if the **Late Fee** for the contract is a **Per Minute** fee, the **Min. Late** column tracks the total minutes that passed before the student was picked up. The **In** and **Out** columns record days on which the student was signed in and signed out using the **Tablet Check-in** module.



To view additional information about an entry, double-click on it. When a user double clicks into an attendance record, for example, the **Attendance** window opens. The window details signatures used to sign the registrant in or out, as well as a corresponding photo when only certain people are authorized to pick up the registrant in the **Tablet Check-In** module.

Notes & Email Tab

The **Notes & Emails** tab tracks comments and communications for the individual participant's registration.



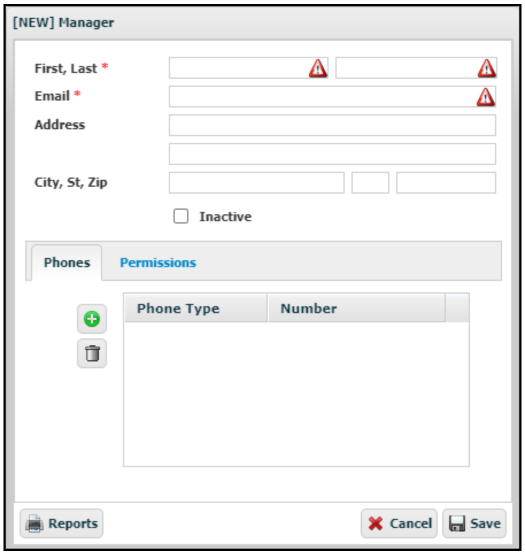
Notes may be manually entered in the **Notes** field. These records are for internal purposes and will be viewed only by users who are logged into RegWerks.

The **Emails** list shows all emails that have been sent from the RegWerks system regarding this registration. Users can double-click on an email to view or print it. To resend an existing email, users select the **Resend** button.

Manager

The **Manager** menu option allows you to create managers that can then be selected at the **Course** or **Class** level as the person who responsible a particular course or class. An example of a manager is a pool manager that oversees all swimming courses.

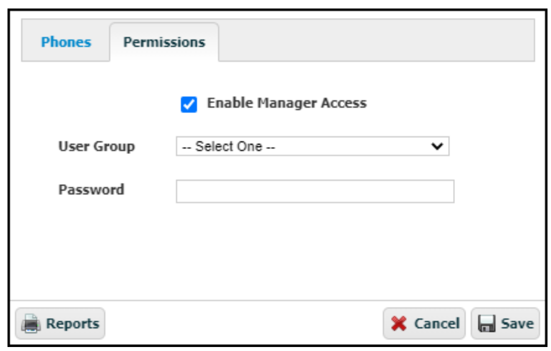
Adding a Manager



To add a manager, select **Manager** under the Main Menu. Click the **Add Record** button, which will open the **Manager** window.

Users are required to enter the name and email address of the manager. All other fields are optional. To add a phone number, click the **Plus Sign** button on the **Phone** tab. Select a phone type from the drop-down menu before inputting the phone number.

Unlike a user, a manager does not have access to the RegWerks system by default. To give a manager access to the system, enable **Manager Access** on the **Permission** tab by checking the corresponding checkbox. Assign the manager to a user group using the **User Group** drop-down menu and give them a password with which to log in; the username will be their email address.



Editing a Manager

To edit a manger, double-click on the name of the manager whose profile needs editing. Enter corrections in the profile before clicking **Save**.

Deleting a Manager

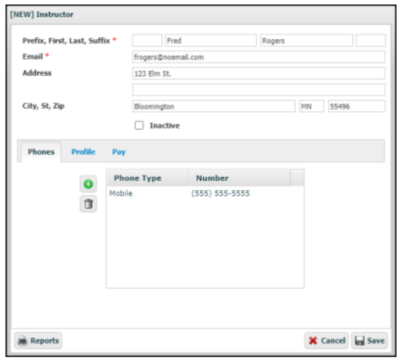
To delete a manager, select the person's profile in the **Manager** list and click **Delete** in the upper left-hand corner. A prompt will appear to confirm this deletion. Select **OK** to complete the process.

Instructor

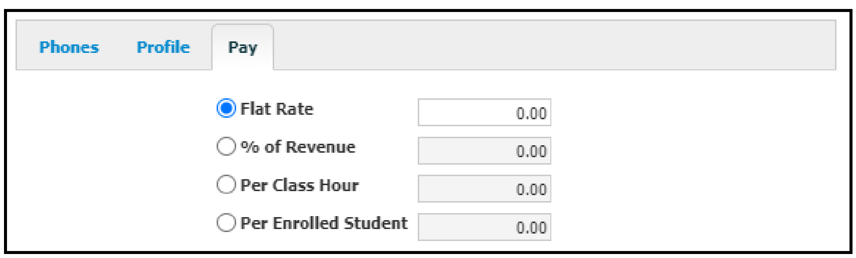
The **Instructor** menu option allows users to create instructors who can then be selected at the **Class** level as the person who teaches a class.

Adding an Instructor

To add an instructor, select **Instructor** in the Main Menu. Click the **Add Record** button. Only the name and email address of the instructor are required, but additional information may be added in other fields. To add a phone number, click the **Plus Sign** button on the **Phones** tab. Choose a phone type from the drop-down menu before inputting the phone number.



The **Pay** tab may be used to notate the amount that an Instructor is being paid. Once the Instructor is assigned to a Class, information recorded in the **Pay** tab will be automatically added at the class level.



Editing an Instructor

To edit an instructor, in the Main Menu select **Instructor**. In the Instructor list which appears at right, double-click on the name of the instructor whose profile requires editing. Enter corrections before clicking **Save**.

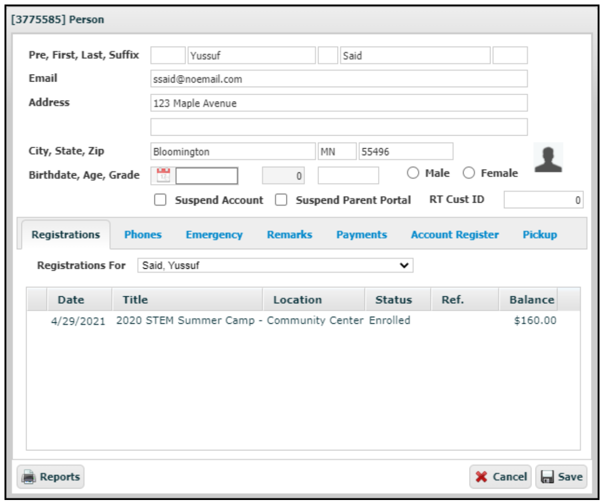
Deleting an Instructor

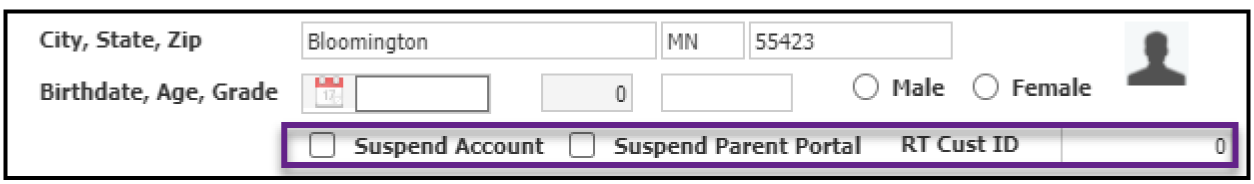
To delete an instructor, in the Main Menu select **Instructor**. In the Instructor list which appears at right, click on the appropriate **Instructor** and then select **Delete** in the upper left-hand corner. A prompt will appear to confirm this deletion. Select **OK** to complete the process.

Person

The **Person** menu option lists all people who have signed up for a class using the RegWerks software or who are account holders.

In the Main Menu, select **Person**. In the **Person** list which appears at right, double-click on the person's name and the **Person** profile will open. By default, personal information in the Person profile was either entered at the time of registration or at the time of creating a new account. If the **Person** has an account on the Web Store, they can change their information in their **Account Settings.** Similarly, account holders may change information for any registrant on their account either in the **Parent Portal** or when registering for another class. Person profiles may also be edited by RegWerks users who have the necessary user permissions.





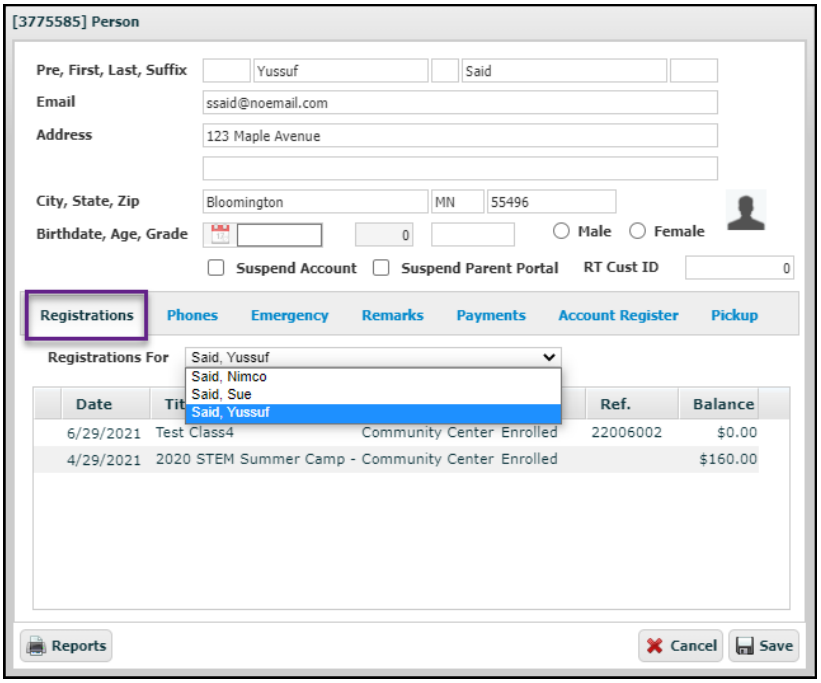
Suspend Account: RegWerks users may choose to suspend a Person's account by checking the **Suspend Account** box. When an account is suspended, the account holder will still be able to log into their account, view past orders, and access the **Parent Portal** (unless it has also been suspended) but will not be able to register either themselves or anyone else on their account for a new class. If they attempt to do so, the account holder will receive a message notifying them that their account has been suspended and instructing them to contact the office for further information.

Suspend Parent Portal: RegWerks users may also choose to **Suspend Parent Portal**, which suspends the account holder's access to the **Parent Portal**. The account holder will still be able to log into their account, view past orders, and register for classes, but they will be unable to see the **Parent Portal** link on the **My Account** page or use it to make a payment.

RT Cust ID: The **RT Cust ID** field displays the account holder's RevTrak account ID. If the Person is an account holder, the field will be auto-populated with their account number. If the Person is not an account holder, only a **0** will appear in this field.

Registrations Tab

The **Registrations** tab lists the Person's registration history, including every class for which that individual has ever registered in RegWerks. Double-click on a Registration to review details about that registration. To view Registration histories for other people linked under the same account, click on the **Registrations For** drop-down menu and choose a name. The **Registration History** list will change to display this second Person's registration history.

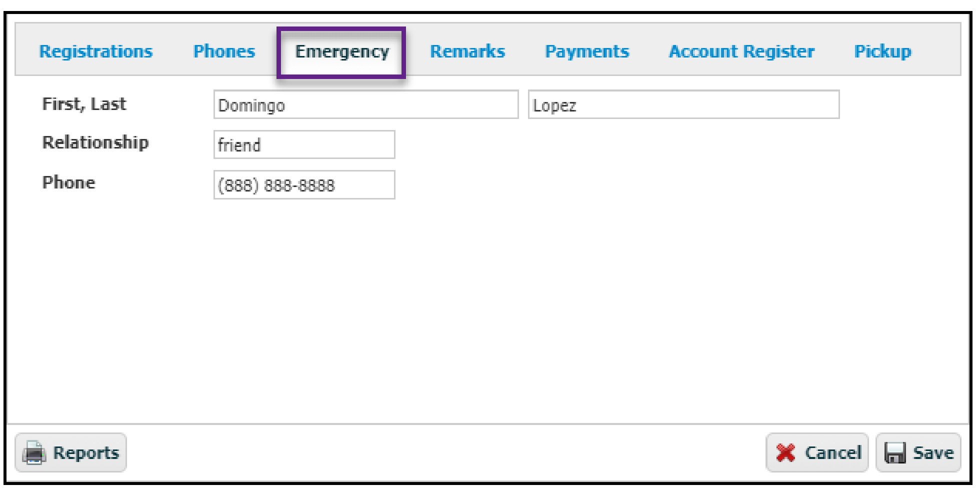


Phones Tab

The **Phones** tab lists all phone numbers on file for a Person. Enter additional phone numbers by clicking on the green **Plus Sign** button. Edit existing phone numbers by double-clicking on the number in the **Phone Type** field. To remove a phone number, click once on the number in **Phone Type**, and then click the **Trash Can** button.

Emergency Tab

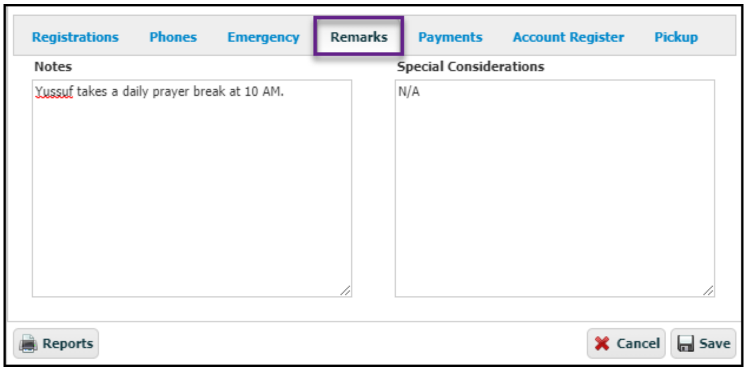
The **Emergency** tab lists the person's emergency contact information, which users may edit.



Remarks Tab

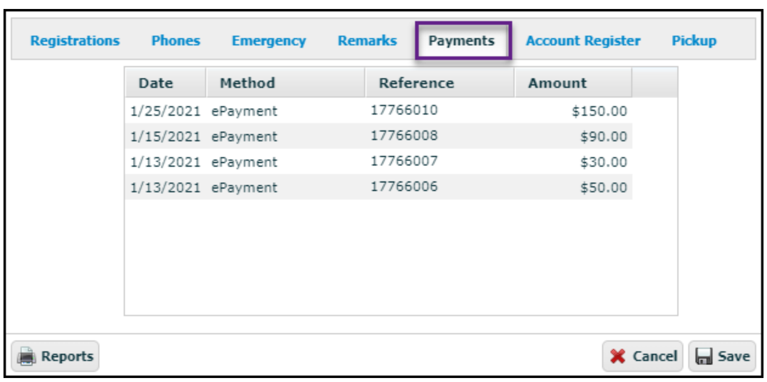
The **Remarks** tab stores internal notes and special considerations for a Person. Users may enter notes about a person in the **Notes** field, which will be included on the **Class Roster - Remarks** report.

The **Special Considerations** field records special considerations for a student. This field corresponds to one of the standard questions that can be added to a registration at the **Course** level under the **Questions** tab. The Special Considerations field below will auto-fill with a registrant's response if it was completed at the time of registration.



Payments Tab

The **Payments** tab shows the registrant's **Payment History**, and tracks all payments that have been made on their registrations.



Account Register Tab

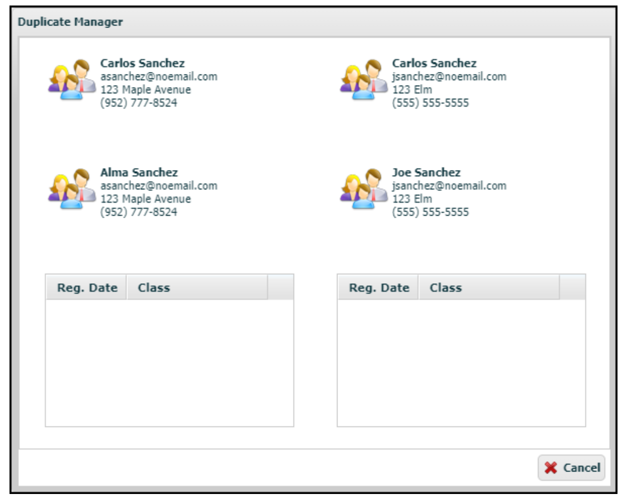
The **Account Register** tab records the history of all charges, payments, and adjustments on the Person's registrations.

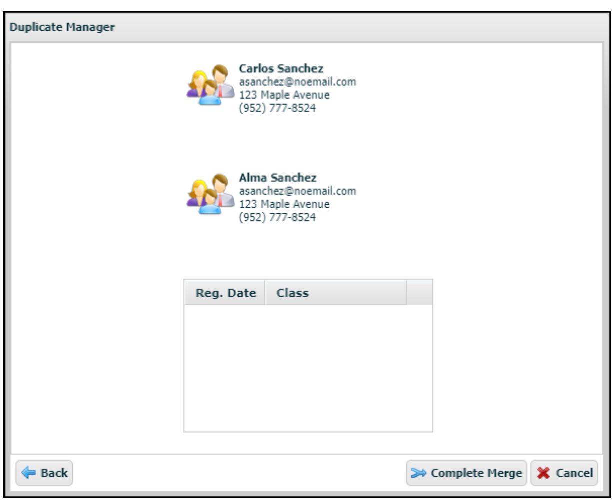
Merge

The **Merge** button allows users to merge duplicate accounts. To locate it, select **Person** in the Main menu, and the **Merge** button will appear in the toolbar at the top of the page.

To merge two accounts, select the original and the duplicate to be merged in the **Person** list while holding down the **Cmd** key (Mac) or **Ctrl** key (Windows). Once the two profiles are selected, click on the **Merge** button. The **Duplicate Manager** window will open and display information for each of the two selected persons.

The account holder's information appears beneath each of the two profiles. This allows the user to identify the correct account holder for the registrant before completing the merge. In the example at right, the registrant Carlos Sanchez is linked to two different account holders, each with a different email address.



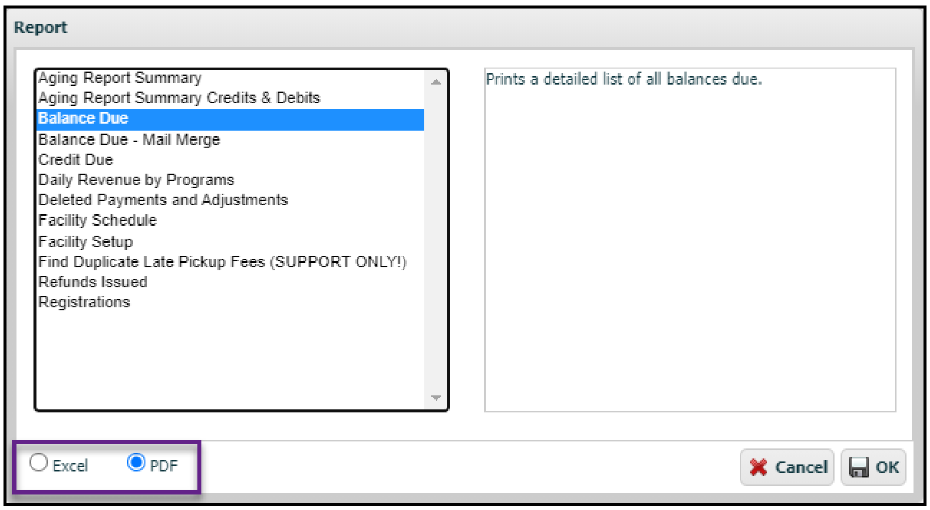


To begin merging the accounts, double-click on the account into which the duplicate will be merged. The **Duplicate Manager** window will change to display a preview of what the merged profile will look like. Click the **Back** button to change the merge choice, or click the **Complete Merge** button to complete the merge. In the example at left, by selecting Carlos Sanchez, linked to account holder Alma Sanchez, the user may review how Carlos' account will display following the merge. Select **Complete Merge** to create a single account for Carlos, which is linked to Alma.

Reporting

The **Reports** button provides users with access to over 100 reports in RegWerks. These reports will vary depending on which menu option or window is currently active or open.

The **Report** window features a scrolling list of report options, as well as a brief description of each report when the user clicks on the report title. Some reports are available in both Excel and PDF format. Where formatting options are available, users may choose the desired format by selecting the corresponding radio button at the bottom of the **Report** window.



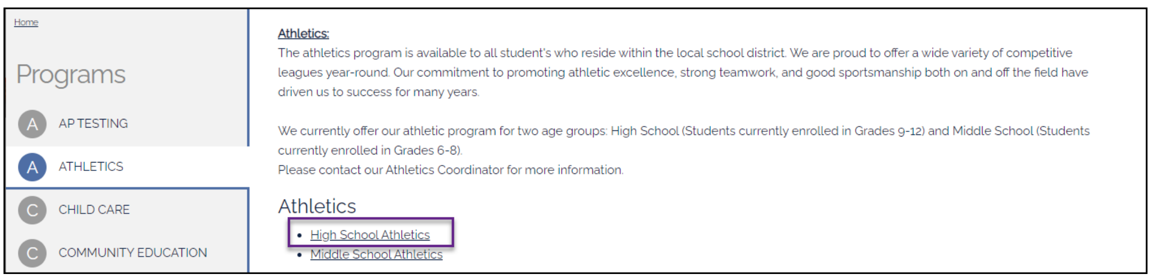
If it appears that reports are not running properly, please do not hesitate to contact the RegWerks support line at 888-847-9470.

Walk-In Registration

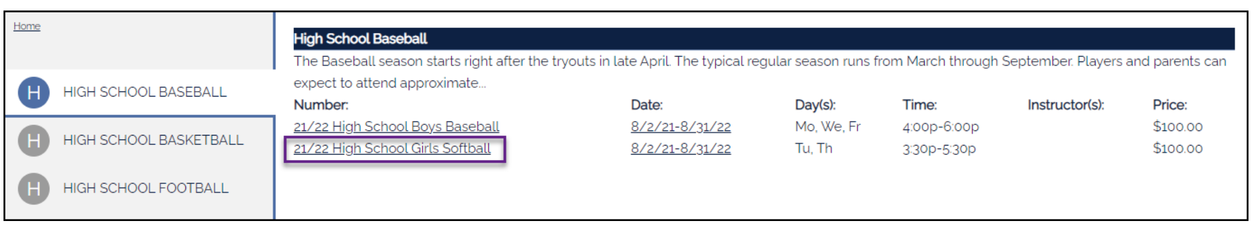
The **Walk-In Registration** feature allows RegWerks users to register a student for a class in person or over the phone. It also enables users to take various forms of payment (i.e. cash, check, money order) that cannot be processed through the Web Store and notate them in RegWerks. Best practices for completing Walk-In Registrations include: search only on Account Holder's email address; create accounts for account holders (parent/guardian/caregiver) first, then add children to that adult's account; maintain only one open RegWerks session at a time (do not log in on multiple browser tabs); do not hit the back arrow; and if a user must abandon a Walk-In Registration session prior to completion, either clear the cart first, or close the browser tab and wait 60 minutes for the system to clear itself of this abandoned entry.

To perform a walk-in registration, click the **Register** button in the toolbar.

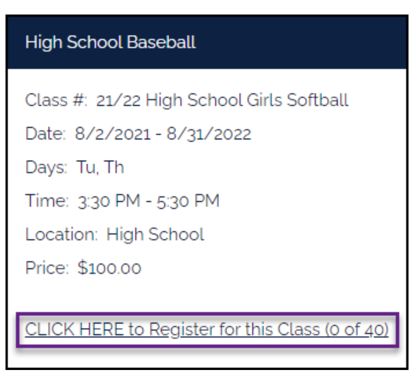
A new browser tab will open and display Program options. Select a Category by clicking on the category title.



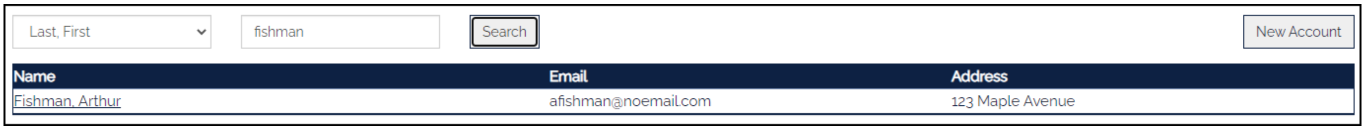
Choose the appropriate Course. When the **Class** list appears, select the class in which the student must be registered.



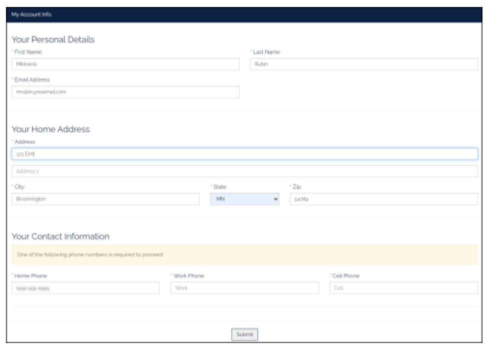
The **Class Details** page will appear, and the user will click on the **CLICK HERE to register for this Class** link. Unlike on the Web Store, there will be an enrollment count at the end of the link (i.e. 14 of 40); this is only visible during a walk-in registration.



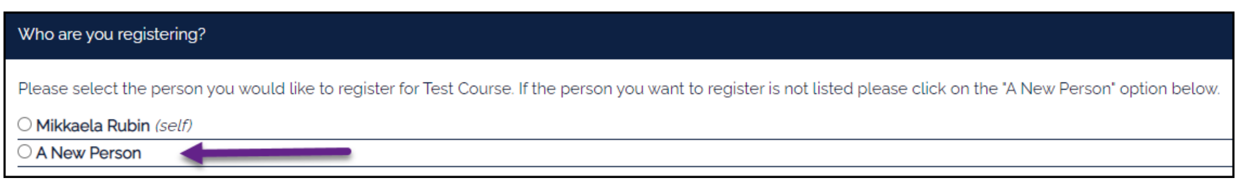
After clicking the link, the user will be taken to a screen that allows a look up an account in the system or create a new account. If the participant has registered online before, **Search** for the account holder's (parent/guardian/caregiver) email address, select it, and then select the radio button for the corresponding participant before filling out the question profile.



If the account holder does not have an account, create one for this parent/guardian/caregiver by clicking the **New Account** button and filling out the basic account holder information on the page shown below. The account holder will then have to create a password on the Web Store later if they wish to access their online account or use the **Parent Portal**.

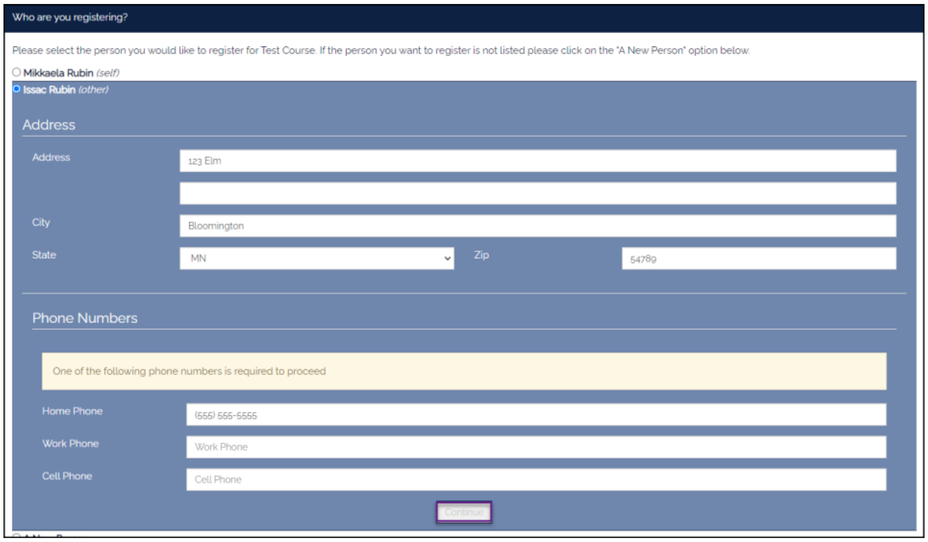


Account holders (parent/guardian/caregiver) always appear at the top of the list of names on the page below. In the example below, Mikkaela Rubin is the Account Holder, and any **New Person** added under this account would be a participant or child.

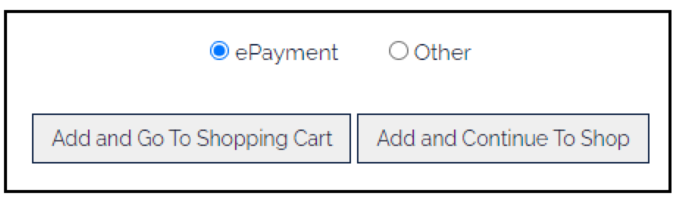


If the account holder is enrolling someone other than themselves that has never registered, create a participant on their account by clicking **New Person** button. The **Add Person** window will open. Enter the participant's name, then **Submit**, to link the new Person's (or child's) account under the primary account holder's account.

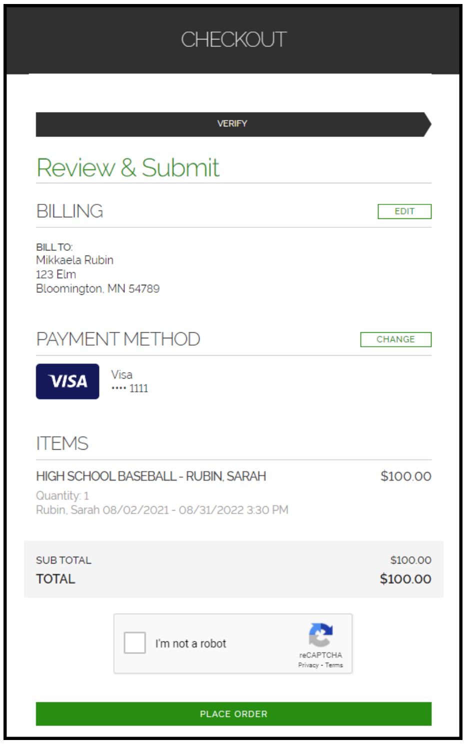
To register the New Person for the class, click on the radio button beside their name. By default, the account holder's address and phone numbers will cascade down and populate the New Person's account. Select **Continue**. Begin answering the questions on the Question Profile.



After completing the registration questions, select the appropriate payment method for the registration: **ePayment** (i.e. credit card, debit card, eCheck) or an **Other** payment (i.e. cash, check, voucher). If a registrant is making a partial payment, choose the **Other** payment option. If you need to make other registrations on this account, select **Add and Continue to Shop**; otherwise, click **Add and Go To Shopping Cart**.

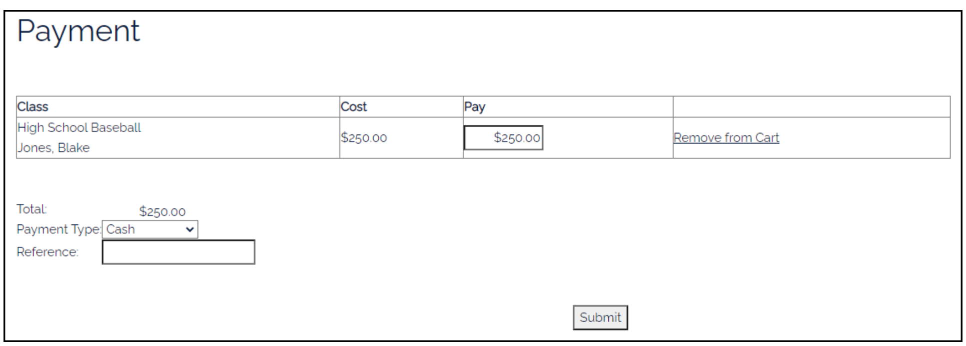


Once a user selects either **Add and Go to Shopping Cart**, no further edits may be made to this registration. Clicking on the back arrow will cause registration errors.



For **ePayment** payments**,** the Web Store **Checkout** screen will appear. Users may either remove the registration from the shopping cart or complete the checkout process by entering the necessary billing information, selecting **I'm not a robot**, completing the transaction, and viewing the receipt which was sent to the account holder's email.

For **Other** payments, the **Payment** screen will appear. Users may either remove the registration from the shopping cart or record a payment and complete the registration process. The **Pay** field will auto-fill with the total cost of the class. Users may record $0 payment, a partial payment, or payment in full to reflect the actual amount received at that point in time. Upon completion, the unpaid portion of the class cost will be added as a balance due for the registration.



Choose the payment type from the **Payment Type** drop-down menu and enter a reference number if applicable before clicking **Submit**. After the registration is submitted, users may view the receipt which was sent to the account holder by selecting the **Click Here** link, or they may choose to make another registration.

If you would like further information about completing Walk In Registrations, please call the RegWerks support line at (888) 847-9470 or send an email to support@regwerks.zendesk.com.

Look Up Field

The **Look Up** field allows users to complete a search within each menu option in RegWerks. Start by selecting the item under the Main menu (i.e. Course, Class, Person, etc.) or Setup menu (i.e. Program, Category, User, etc.) Using the look up fields at the top of the page, enter the word (or partial word) to be queried. The system will pull a list of all items that match this entry. As an example, under Main menu, select Person. In the Name look up field, enter the last name of the Person to view a list of all accounts which match that last name:

Person

ID	Name	Age	Email	Address	City	State	Zip
	lopez						
3714624	Lopez, Alana	4	alopez@fauxemail.com	123 Maple Avenue	Bloomington	MN	55496
3700252	Lopez, Ana	0	alopez@fauxemail.com	123 Maple Avenue	Bloomington	MN	55496
3700243	Lopez, Ariel	0	alopez@fauxemail.com	123 Maple Avenue	Bloomington	MN	55496
3714657	Lopez, Carl	20	alopez@fauxemail.com	123 Maple Avenue	Bloomington	MN	55496
3720938	Lopez, Izzie	19	alopez@fauxemail.com	123 Maple Avenue	Bloomington	MN	55496
3700249	Lopez, Joseph	0	alopez@fauxemail.com	123 Maple Avenue	Bloomington	MN	55496
3783928	Lopez, Santiago	0	alopez@fauxemail.com	123 Maple Avenue	Bloomington	MN	55496
3700228	Lopez, Tianna	0	lizzy.moeller@revtrak.net	123 1st Street	Bloomington	AL	55496

Similarly, to pull up all Classes which include the same word in the Class Number, select Class under Main menu. For many searchable items (Course, Class, Question Profile), refer to the Status drop-down menu at right to confirm which status type is being pulled (All, Active, Inactive). In the Class Number field, enter the appropriate word or code to complete the search:

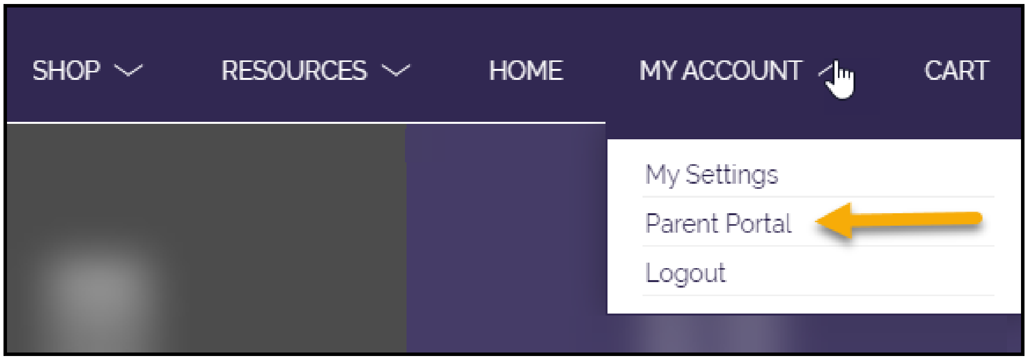
Class Active

ID	Class Number	Program	Class	Start Date	Price	Enrolled	Waitlist	Go Limit	Limit
	summer								
354887	2020 Basketball Summer Camps	Summer Programs	Summer Camps	08/09/2021	$200.00	8	3	0	
354884	2020 STEM Summer Camp	Summer Programs	Summer Camps	08/16/2021	$150.00	16	0	0	
345477	2021 Summer Baseball Skills Workshop	Athletics	High School Baseball	06/21/2021	$250.00	15	0	0	
354881	Algebra I (Summer 2021)	Summer Programs	Algebra	06/07/2021	$50.00	12	0	5	
354882	Algebra II (Summer 2021)	Summer Programs	Algebra	06/01/2021	$100.00	5	2	5	
354883	BIO 1A (Summer 2021)	Summer Programs	Biology	06/01/2021	$150.00	3	0	0	
363942	Creative Writing Workshop (Summer 2021	Summer Programs	English	06/07/2021	$100.00	1	0	0	

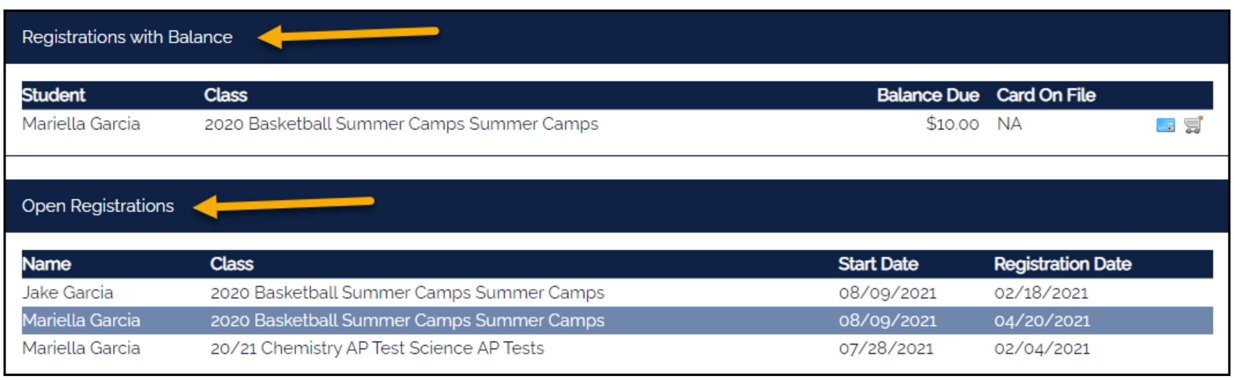
Appendix 1: Parent Portal

The **Parent Portal** is the online space for customers to access historical and current registration, as well as payment information. Within the Parent Portal, account holders may view the history of all registrations tied to the account, as well as pay any outstanding balances. The Parent Portal also permits account holders to pick the days or weeks on which a registrant will attend a class, update the ePayment method on file, and view previous invoices and tax statements.

After an account holder logs into their account on the Web Store, they can access the **Parent Portal** in the **My Account** drop down menu.



By default, the **Parent Portal** opens to the **Financial Info** screen where the account holder can see all active registrations that have balances (**Registrations with Balance**) and all active registrations (**Open Registrations**).



The account holder can change the payment method for a registration using the **Update Payment Method** button ( ). They may also make a payment for a registration using the **Shopping Cart** button ( ), which opens a window that allows them to pay off their balance or add funds to their account.

Once an option is selected, the payment is added to the shopping cart, which the account holder can reach by clicking the **Go to Shopping Cart** button.

If the registration is for a Pick-A-Day or Pick-A-Week class, the account holder can open the **Calendar** ( ) to see the registrant's current attendance schedule or to select new days or weeks.

Account holders may access the **Family Info** page to view every Person associated with this account and click into their names to edit contact information.

Family Info

Name	Schedule	Email	Address	Home
Jane Garcia		jg@fauxemail.com	122 South St.	
John Garcia		jg@fauxemail.com	122 South St.	
Felicity Smith		jg@fauxemail.com	122 South St.	
Mariella Garcia		jg@fauxemail.com	122 South St.	
Ana Garcia		jg@fauxemail.com	122 South St.	
Jake Garcia		jg@fauxemail.com	122 South St.	

Add Family Member

In the **History** section, the account holder may view printable versions of past invoices and tax statements.

Invoice History

Name	Invoice	Date	Amount
Joseph Lopez	371458-14245171	11/18/2020	$0.00
Ariel Lopez	371458-14245129	11/18/2020	$0.00
Alana Lopez	395291-14372176	06/11/2021	$0.00

Reports

- 2022 Tax Statement
- 2021 Tax Statement
- 2020 Tax Statement
- 2019 Tax Statement
- 2018 Tax Statement

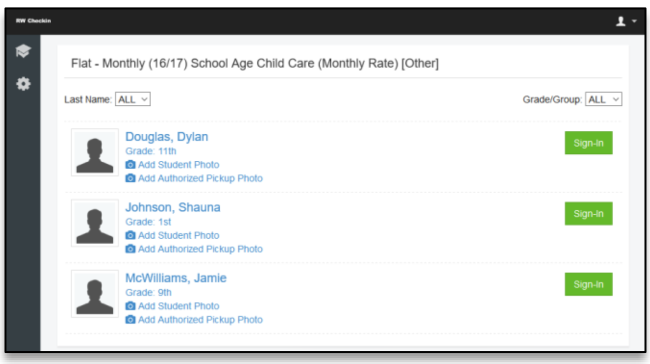
If you would like additional information on the RegWerks **Parent Portal**, call the RegWerks support line at (888) 847-9470 or send an email to support@regwerks.zendesk.com.

Appendix 2: Check-In Station

The RegWerks Check-In Station (**URL**: *schoolcode.facilitywerks.com/checkin*) is a web-based software that records real-time attendance and collects parent signatures using a tablet or other mobile device. The information collected by the check-in station is stored in real-time in your RegWerks system (**URL***: schoolname.facilitywerks.com/admin/*), allowing for more detailed attendance reporting.

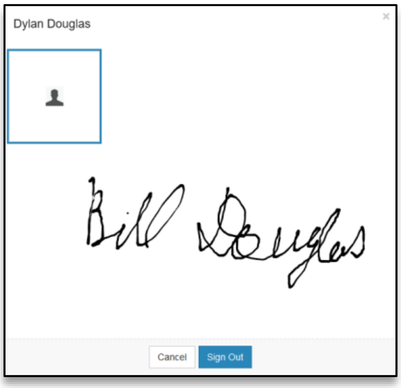
WARNING: *Do not operate the Check-In Station while the attendance clipboard in RegWerks is in use. This can result in Check-In Station data being overwritten or deleted.*

The **Check-In Station** has two modes: **Admin** and **User**. When the module is in **Admin Mode**, users see a list of every student who is scheduled to attend for the day.



An administrator has the option to sign an individual student, multiple students, or even the entire class all at once using the **Bulk Sign-In** and **Sign-Out** features. As with parents/guardians/caregivers, the administrator must provide their signature to sign any children out of the class. An administrator also has the option to save a photo of each student as well as anyone designated as **Authorized Pickups**. This allows teachers to use photos to verify the identity of anyone signing a child out.

When the module is in **User Mode**, parents/guardians/caregivers may sign their student in or out but will not have access to the software's administrative functions.



If there are one or more **Authorized Pickups** associated with a student's account, the person picking up the student must select their photo from the list and provide a signature in the space below before they can check the student out of the class.

The **Check-In Station** also syncs with the **Attendance Clipboard** in RegWerks, allowing users to view the date of sign in and sign out entries along with their corresponding signatures. Please remember to use either the RegWerks Attendance Clipboard or the Check-in Station. Operating both simultaneously will create attendance errors.

RegWerks Support Team
7:30 AM – 5 PM (CST)
Ph: 888.847.9470
support@regwerks.zendesk.com

registration. simplified.