Class Creation Quick Start Guide

This guide is designed to assist users in creating Classes from start to finish. While clients who are new to RegWerks will follow these instructions fairly closely, existing users who simply wish to create a new Class in an existing Course may pick and choose elements of this guide to create new classes.

New users begin the initial set-up of Classes by first organizing all Courses and Classes. This includes establishing Program, Category, and Course, along with creating other elements to define each class, as noted below. The overall goal of the set-up process is to provide a customized structure to satisfy the registration and reporting needs of the organization.
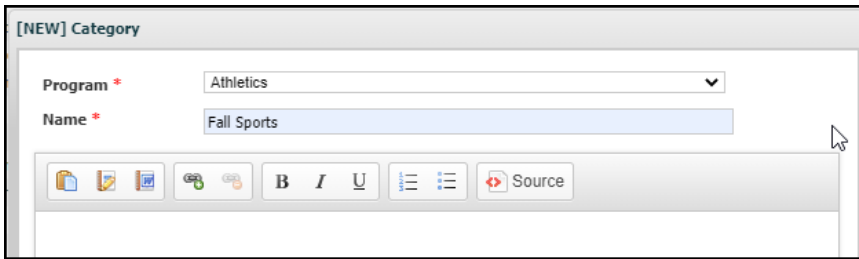
Create an Account Code

1. From the **Setup** menu, click on the **Account Code** menu option.

2. Click the **Add Record** button at the top of the window, and a new **Account Code** window will open.

3. Enter the name of your budgeting account code.

4. Click **Save**.

Create a Program

1. From the **Setup** menu, click the **Program** menu option.

2. Click the **Add Record** button in the toolbar, and a new **Program** window will open.

3. Give the Program a name. In the **Reply To** field, add the email address of the person who is responsible for managing this Program's registrations.

4. For a childcare **Program**, consider checking **Display Federal Tax ID** for reporting purposes. Click **Save**.

Client Support: support@regwerks.zendesk.com

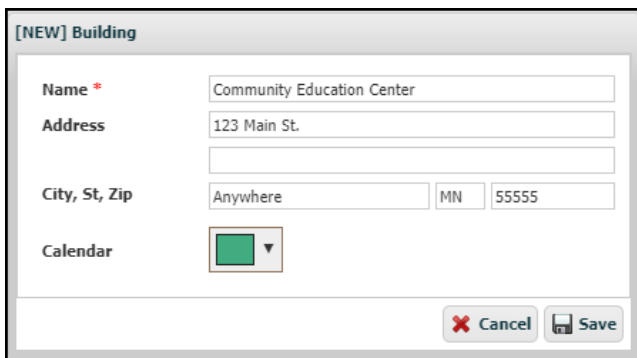## Create a Category

1. From the **Setup** menu, select the **Category** menu option.

2. Click the **Add Record** button, and a new **Category** window will open.

3. Select the Category's Program from selections in the **Program** drop-down menu.

4. Enter the Category's name.

5. Click **Save**.

- When creating a category for the first time, remember to give yourself access to the new category in your user profile. To do this, click on the **User** menu option under **Setup**.

- Access your user profile by double-clicking on your name, and then select the **Categories** tab.

- Locate the new Category and check the corresponding box before clicking **Save**. When creating new Categories, remember to grant user permissions to other Users, as well.

Create a Building *(Optional)*

1. From the **Main** menu, click the **Building** menu option.

2. Click the **Add Record** button.

3. Enter the Building's name and address, then assign it a Calendar color. Click **Save**.

Add a Manager

1. On the **Main** menu, open the **Manager** menu option.

2. Select the **Add Record** button.

3. Enter the name and email address of the person who will receive customer questions from your Web Store.

4. Click **Save**.

Create an Instructor *(Optional)*

1. On the **Main** menu, select the **Instructor** menu option.

2. Click the **Add Record** button in the toolbar, and a new **Instructor** window will open.

3. Enter the instructor's name and contact information.

4. Click **Save**.

Create a Course

1. From the **Main** menu, click on the **Course** menu option.

2. Click the **Add Record** button.

3. Enter the title of the course in the **Title** field.

4. Designate the Course's Program from options in the **Program** drop-down menu.

5. On the **General** tab, select the **Account Code**, **Manager**, and **Category** from their corresponding drop-down menus.

6. In **Go Limit**, define the minimum number of registrations required for this class to take place.

7. In **Reg Limit**, establish class size parameters by setting the maximum number of registrations allowed for this class.

8. On the **Web** tab in **Website Title**, enter the class title as it will appear publicly in your Web Store.

9. Click **Save**.

Create a Class

1. On the **Main** menu, select the **Course** menu option.

2. Double-click into the course that was just created.

3. Click the **Add Class** button in the bottom left corner of the window.

4. When asked if you would like to create a new class, click **OK**.

5. Enter a unique class number in the **Class Number** field, making sure this number is used only once.

6. In **Conf email**, enter the email address of the person (or people) responsible for monitoring that class' registrations.

7. On the **General** tab:

   - In **Publish Date**, enter the date on which the class will first appear publicly on the Web Store.

   - In **Remove Date**, enter the date on which the class will be removed from the Web Store.

   - Define when people may register for this class by completing dates and times in **Reg Begins** and **Reg Ends** fields.

   - Enter the price of the class in the **Price** field.

   - Click **Show on Web** to automatically display the class publicly once Publish Date occurs.

   - For childcare classes, select **Show on Year End Statement** to allow year end reporting.

8. On the **Schedule** tab, select the days of the week on which the class takes place. Click the green button to the left of the Schedule tab.

[349530] Class

Class Number	FY21-HSA1		Status	Active ⌄
Program	Athletics		Enrolled	0
Course	High School Baseball		Waitlist	0
Conf. Email	coach@fauxemail.com			

General   **Instructor & Expenses**   Schedule   **Arrangements**   **Registration**   **Waitlist**   **Receipt**   Invoice

Use Facility Reservation   ◯ Yes   ◉ No   🌐

Group   -- Select One -- ⌄

☐ Sunday   ☑ Monday   ☑ Tuesday   ☑ Wednesday   ☑ Thursday   ☐ Friday   ☐ Saturday

	Start Dt.	End Dt.	Start Tm.	End Tm.	Space
➕ 🗑					

- The **NEW Event** window will open.

[NEW] Event

Building	Community Center ⌄
And/Or	
Other Location	
Start Date	📅 09/14/2020 **End Date** 📅 12/18/2020
Start Time	3:00 PM **End Time** 5:00 PM

✖ Cancel   💾 Save

- Select the building in which the class takes place from the **Building** drop-down menu.
- Enter **Start** and **End Date**. If the times remain set at 12:00 AM, the system will not display any times on the Web Store.
- Click **Save**.

9. In the **Schedule** tab, add a *brief* text description of important class information in **Schedule Description**. Information in the **Schedule Description** automatically prints on customers' receipts upon completing registration in the Web Store.

10. This successfully completes the class creation process.