Imperisoft ARS

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Getting Started with Imperisoft

Imperisoft ARS Help

Imperisoft is a system that provides both class management and customer relationship management for your organization. It includes integrated online class, event, and member registration as well as payment processing.

Imperisoft has a consistent and easy-to-use interface so that extensive training is rarely necessary. The online help system and this document are designed to give you a broad knowledge of the different system features, how they help your organization, and how they interact with each other.

If you are new to Imperisoft you might first want to take a moment to learn your way around.

Please note that we regularly update our online help system so if you are viewing a printed version of our help manual, you may want to check our online help system for an updated version.

Navigation and Basics

- <u>Menu Bar</u>
- <u>Buttons</u>
- Using Search

Top Questions

- How do I add a new student or customer to my database?
- How can I create my class schedule?
- How do I register someone for a program?
- How do I record attendance for a program?
- How can I send an e-mail to a group of contacts?

Setting up Your Imperisoft System

- Setting up Your Database
- Online Registration Overview
- <u>Configuring Online Registration</u>

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Menu Bar

The Imperisoft Menu Bar gives you access to all areas of the system with links and drop-down menus. Place your mouse over the menu option to display a drop-down menu and click to select that area of the application.

home | daily roster | accounts | contacts | courses | reports | accounting | administration | online registration

- home Links to the Imperisoft ARS Home Page
- daily roster View class rosters and take attendance
- <u>accounts</u> Search for and create accounts
- <u>contacts</u> Search for and create contacts
- <u>courses</u> Search for registrations as well as search for and create semesters and programs
- <u>reports</u> Access pre-defined Imperisoft reports
- <u>accounting</u> Search for transactions and invoice accounts
- <u>administration</u> Manage drop-downs (Lookups), organization and unit settings, and user accounts
- online registration Links to your Online Registration page

Accounts Menu

The accounts menu contains links to the following:

- Accounts Opens a <u>search</u> page that allows you to perform a search for contacts based on multiple criteria.
- **Membership** Opens a <u>search</u> page that allows you to perform a search for all contacts who are assigned a membership.

To find an account

• Select **Accounts** from the **accounts** menu on the toolbar and use the <u>search</u> functionality to locate the account.

To create a new account do one of the following:

• Click Add new contact... from a contact search page.

NOTE: This creates a new contact for a new account. If you would like to <u>create a new contact for an existing account</u>, use the account search to locate the account and add the contact to the account.

• Click**Add new account...** from the account search page.

Contacts Menu

The contacts menu contains links to the following:

- All Contacts Opens a <u>search</u> page that allows you to perform a search for contacts based on multiple criteria.
- **Members** Opens a <u>search</u> page that allows you to perform a search for all contacts who are assigned a membership.
- Student, Instructor, Donor, Board Member, Model, as well as any <u>contact category types</u> that have been created for your organization - Opens a <u>search</u> page that allows you to perform a search for contacts of the selected category type.
- **Notes** Opens a <u>search</u> page that allows you to perform a search for notes that have been added to contact records.
- Follow-Ups Opens a <u>search</u> page that allows you to perform a search for follow-ups.
- Addresses Opens a <u>search</u> page that allows you to perform a search for addresses assigned to contact records.
- **Credit Cards** Opens a <u>search</u> page that allows you to perform a search for credit cards assigned to contact records.

To find a contact

• Select <u>All Contacts</u> or choose one of the <u>Contact Categories</u> from the **Contacts** menu on the toolbar.

To create a new contact

• Click Add new contact... from a contact search page.

NOTE: This creates a new contact for a new account. If you would like to <u>create a new contact for an existing account</u>, use the account search to locate the account and add the contact to the account.

Courses Menu

The courses menu allows you or your Imperisoft ARS administrator to set up semesters or program groups and manage programs. You can also use the Bundles and Registration searches to locate registered students.

The courses menu contains links to the following:

- **Semesters*** Opens a search page that allows you to perform a search for semesters based on multiple criteria or <u>create a new semester</u>. From here you can open a semester to make changes, or to <u>add a new program</u>.
- **Programs**** Opens a search page that allows you to perform a search for programs based on multiple criteria.
- **Bundles***** Opens a search page that allows you to perform a search for <u>bundles</u>.
- **Currently Registered Students** Opens a search page that allows you to perform a search for students and related contacts. This search is limited to students whose registration status is "Registered" It does not include registrations which have a status of Dropped, Transferred, Withdrawn, or Cancelled.

Note: This search will display students registered for a Completed program because the registration status is Registered. To perform a search that does not include completed programs, add a filter using the *Program Status* field, the <> operator, and *completed* in the value field. Program Status <> completed

• All Registrations - Opens a search page that allows you to perform a search for students and related contacts. This search includes students whose registration status is Registered, Dropped, Transferred, Withdrawn, and Cancelled.

* Depending on the <u>terminology</u> your organization has chosen to use, the **Program Groups** menu option might be titled **Semesters**, **Terms**, or another term used for groups of programs or events. For the purpose of this documentation, it will be referred to as the **Program Groups** menu option.

****** Depending on the <u>terminology</u> your organization has chosen to use, the **Programs** menu option might be titled **Sessions**, **Courses**, or another term used for programs or events. For the purpose of this documentation, it will be referred to as the **Programs** menu option.

*** Depending on the <u>terminology</u> your organization has chosen to use, the **Bundles** menu option might be titled **Packages**, **Multi-Sessions**, or another term used for bundles of programs. For the purpose of this documentation, it will be referred to as the **Bundles** menu option.

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Accounting Menu

The accounting menu allows you to perform payment and transaction searches, invoice accounts, and generate charges for recurring programs.

The accounting menu contains links to the following:

- Search for Invoices Opens a search page that allows you to perform a search for invoices based on multiple criteria.
- **Search for Payments** Opens a search page that allows you to perform a search for payments based on multiple criteria.
- Search for Transactions Opens a search page that allows you to perform a search for transactions based on multiple criteria.
- <u>Invoice Accounts</u> Opens the Print Invoices page to allow you to print invoices for accounts.
- Generate Charges Allows you to generate charges for the month for all students registered in recurring programs.

Administration Menu

The administration menu provides access to the following administrative features:

- <u>Lookups</u> Allows you to set up and manage options within the drop-down boxes throughout your database.
- <u>Manage Contact Categories</u> Allows you to create new custom <u>contact</u> <u>categories</u>.
- <u>Manage Unit</u> Opens the Edit Unit page which allows you to specify various settings for the unit such as online registration settings and Terms of Use for your site.
- <u>Manage Organization</u> Opens the Edit Organization page which allows you to manage several aspects to your organization such as terminology, organizational roles, and user accounts.

Toolbar Buttons

The toolbar is in the upper left-hand corner of many pages within Imperisoft, directly underneath the main menu. Unlike the main menu, the toolbar does not remain constant and static throughout the Imperisoft System. Rather, it automatically adjusts according to the your ability to edit the content of each page.

The toolbar contains a standard set of buttons that allow the you to save changes, save and return to the previous page, create new records, cancel changes, delete records, or refresh the current page. In addition to the standard toolbar options, special toolbar options are displayed when the page contains special features.

Icon	Tooltip	Keyboard Shortcut	Description
	Save	Alt+S	When clicked, any change made or data entered is saved and the current page is refreshed within your browser.
•	Save and Return	Alt+B	When clicked, any change made or data entered is saved and you are redirected to the previous page.
a.	New	Alt+N	When clicked, you are redirected from the record you are editing to a new blank record.
2	Cancel	Alt+C	When clicked, any change made or data entered since the last save is discarded and you are redirected to the previous page.
×	Delete	Alt+D	When clicked, you are prompted to confirm the <i>delete process</i> .
			If you choose to cancel the delete request, you will return to the editing page with no loss of data. If you choose to continue with the delete process, the record is deleted from the database and you are redirected to the previous page.
8	Refresh	Alt+R	When clicked, any change made or data entered is discarded and the current page is refreshed, or returned to its condition as of the last save.
(<u>E-mail</u> <u>Contact</u>	Alt+E	When clicked, a Send E-mail page appears and a message can be composed in a rich textbox editor.
\bigotimes	Send E-mail	Alt+S	When clicked within a Send E-mail page, an e-mail is sent to the recipient.
Ø	Preview	Alt+V	Once you have composed an e-mail, you may click on the "Preview" button to see a final version of its contents displayed on the "E- mail Preview" page which allows the user to confirm the accuracy of content and addresses placement of graphics and images.

Imperisoft ARS

Using Search

The Imperisoft Search functionality allows you to locate accounts, contacts, and various contact related information such as credit cards, notes, follow-ups and addresses, as well as program related data such as semesters, programs and registrations. You can also use Search to export a list of results to Microsoft Excel or to <u>e-mail a group</u> of contacts.

It is very important that you fully understand how to use the Search functionality in Imperisoft. In most cases you must go through the Search page for an item in order to create a new item.

To use search

- Click **accounts** on the menu bar to open the Account Search page.
- Select **All Contacts** from the **contacts** menu to open the Search for All Contacts page or select any one of the contact category searches.
- Select Notes, Follow-Ups, Addresses, or Credit Cards from the contacts menu to search for related information.
- Select **Memberships** from the **accounts** menu to open the Memberships Search page, or select **Members** from the **contacts** menu to open the Member Search page.
- Select **Semesters** from the **courses** menu to open the Semester Search page.
- Select **Programs** from the **courses** menu to open the Program Search page.
- Select **Bundles** from the **courses** menu to open the Bundle Search page.
- Select **Currently Registered Students** or **All Registrations** from the **courses** menu to search for registrations.
- Select Search for Invoices, Search for Payments or Search for Transactions from the accounting menu to perform payment and transaction related searches.

Every search page is set up with the same basic components: Saved Searches, <u>Filters</u>, <u>Result Fields</u>, <u>Sorting</u> and <u>Search Results</u>.

The Saved Searches section allows you to save the Filter, Result Fields and Sorting options set for a particular search and save those settings for future use. Click here for more information about how to Save a search.

Search Filters allow you to specify who or what you would like to search for.

To apply Search Filters to your search

- 1. Click the *chevron icon* to expand the filters grid.
- 2. Click Add Filter.
- 3. Select a field on which to search from the **Field** box.
- 4. Select an appropriate operator from the **Operator** list.

- 5. Click in the **Value** box, type a value.
- 6. Repeat steps 2 6 to add additional filters to the search.
- 7. Click **Go** to execute the search.

The Result Fields allow you to choose how your search results are displayed before you perform a search.

To choose what displays in the Search Result

- Click the chevron icon to display the **Result Field** check boxes. By default, all fields are selected to display in the search results.
- 2. Clear the check box next to any fields you wish to remove from the list, and select the check box next to any fields you want to add to the search results.
- Click Select/Clear All to select all the boxes at once or to clear all the boxes at once.
- 4. Click **Go** to execute the search.

The Sorting feature allows you to determine *how the results of a search are sorted* when they are displayed.

For example, when searching for accounts from the Account Search page, the records by default are sorted by account ID. You might however decide that you would prefer to sort them alphabetically by Account Name.

Each standardized search allows for up to three sort filters to be applied. The second and third sort filters will *sort sets of results within your results* where there are multiple recurrences of the same name or identification tag.

For example, if in the results of your search the system returns 25 instances of the name Jane Smith, you can opt to have those 25 records placed in a certain order as well. By specifying a second sort filter such as "r; ID," those 25 instances of Jane Smith records will be listed in numerical order by ID numbers.

To use Sorting

- 1. Click the chevron icon to display the **Sorting** boxes.
- 2. Click in the first drop-down menu and select which section you would like to see sorted.
- 3. Click the **Ascending** radio button to sort the results in ascending order, or choose the **Descending** radio button to sort the results in descending order.
- 4. Click **Go** to execute the search.

The Search Results displays the results of your search.

To use the Search Results

- Click in the Show records per page drop-down box and select the number of records you want to display on each page of your results. Page numbers will appear in the blue footer at the bottom right-hand corner of the results grid. Click on a number to view the results page by page.
- Click Go to activate the search.
 Once your result list displays, you can choose from any of the following actions:
 - Click **Export to Excel** to export the results of your search to a Microsoft Excel spreadsheet.
 - Click <u>E-mail this Group</u> to send an e-mail to each of the records in the result list.
 - To edit a record do one of the following:

Click the *Edit* button at the right of the record you want to edit.

Click the **Select** button at the right of the contact you want to edit.

• Click the **Add New** link at the bottom of the page to create a new record.

The Add New link options will vary, depending on the context of the search and the access rights you have been granted.

- Use the **Showing** numbers in the lower left corner of the page to see the total number of records returned by the search.
- Use the **Go to page** numbers in the lower right corner of the page to jump to another page of results.
- Click the **ellipsis** (three periods) in the lower right corner to jump to the next group of ten pages.

Reports

The Reports section allows you view and print reports on information you need to make efficient and effective business decisions. The options available in each report are different. For demonstration purposes, we will take a look at the Daily Roster report.

To access the Daily Roster report

- 1. Click **reports** in the menu bar. The Reports home page displays.
- 2. Click the arrow next to the **Programs** section to expand the list of available reports.
- 3. Click Daily Roster.
- 4. Click the **Attendance Date** *calendar button* and select a date from the calendar.
- 5. Click the arrow next to **Program** and select a program. To view all programs, select (Select All).
- Click View Report. The Daily Roster report displays.

To navigate through a report

- Click the *Next Page* button to move to the next page of the report.
- Click the Last Page Pl button to move to the last page of the report.
- Click the *Previous Page* button to move to the previous page of the report.
- Click the *First Page* dutton to move to the first page of the report.
- Click the *Zoom* **100%** button to increase or decrease the size of the report on the screen.
- To find specific information in the report, click in the **Find** box, type text you want to locate, and then click **Find**.
- To export information from the report, click in the **Export** box, select a format, and then click **Export**.
- Click the *Refresh* button to refresh the information displaying on the report.
- Click the *Print* button to print the report.

Changing Your Password

To change your password

- 1. Click **Change Password** in the Activities box on the Home Page.
- 2. Type your new password in the **New Password** box.
- Your password cannot be more than 8 characters in length.
- 3. Click in the **Confirm New Password** box and type your new password again.

Contact and Student Management

Managing Contacts

You can store many types of contacts in Imperisoft. A contact might be a student, or a parent of a student, an instructor, a donor, or a board member for example.

Contacts are always associated to an Account, so when you add a new contact to the system, you are either adding it to an existing account, or creating a new account for the contact.

How you add that contact to the system depends on the contacts purpose in your organization

- Adding a new adult Student
- Adding a new child Student
- Adding a new child Student to an existing Family Account
- Adding a general Contact
- Adding an Instructor
- Adding a Donor
- Adding a Board Member
- Adding a Model (often used for Art Schools)

Adding a New Contact

Contacts in Imperisoft are always associated with an Account. When creating a new contact record, you must create a new account as well or create a new contact for an existing account.

To add a new contact for a new account

- 1. On the **contacts** menu, click **All Contacts**, or click the contact category appropriate for the new contact.
- Click Go to display the Search Results grid, and then click Add new contact...., or Add new student..., Add new Instructor... etc. The Add Contact page displays.
- 3. Select an account type in the Account Type box.
- 4. Type a name for the new account in the **Account Name** box.
- 5. Select a type in the **Account Contact Type** box to indicate the relationship of the new contact to the account.
- 7. Type a title for the contact in the **Title** box.
- Type a salutation for the contact in the Salutation box. Salutation would be the customer's nick name or informal name if he or she should be referred to as something other than what is typed in the First Name field.
- 9. Type the full name of the contact in the **First Name**, **M.I.**, and **Last Name** boxes.
- 10. Click the *Save* button.
- 11. Use the tabs at the bottom of the **Add Contact** page to add additional contact information.
- 12. Click the *Save* button to save the new account and contact information.

To add a new contact for an existing account

- 1. On the **accounts** menu, click **Search for Accounts**, and use the search functionality to locate the account.
- 2. From the **Search Results** grid, click the *Edit* button next to the account. The Edit Account page displays.
- 3. Click the **Contacts** tab, and then click **Assign new contact...**. The Account Contact Search page displays.
- 4. Click **Go** to bring up the **Search Results** grid, and then click **Add new contact...**
- 5. Type a title for the contact in the **Title** box.
- 6. Type a salutation for the contact in the **Salutation** box. Salutation would be the customer's nick name or informal name if he or she should be referred to as something other than what is typed in the First Name field.
- 7. Type the full name of the contact in the **First Name**, **M.I.**, and **Last Name** boxes.

- 8. Use the tabs at the bottom of the **Add Contact** page to add additional contact information.
- 9. Click the *Save and Return* button. The Assign Account Contact page displays.
 10. Select an account contact type in the Type box, and then click the Save button.

Editing a Contact

The Edit Contact page allows you to view the details of a contact or change contact information.

To edit a contact

 Locate the contact using the Contact <u>Search</u> feature, and then click the <u>Select</u> button.

The Edit Contact page displays.

- 2. Use the **About** section to view the **ID**, **Historical ID**, **Unit**, **Active** status, and the dates the contact was **Created** and **Modified**.
- If the contact is a Student, select a status from the Status box. If the contact is not a student, the Status box is not visible.
 A record of the status changes is available in the Status History tab for Student contacts.
- 4. Use the **Title** box to add or change the contact's title.
- Use the Salutation box to add or edit a salutation. Salutation would be the customer's nick name or informal name if he or she should be referred to as something other than what is typed in the First Name field.
- 6. Use the **First Name**, **M.I.**, and **Last Name** boxes to change the full name of the contact.
- 7. Use the tabs at the bottom of the **Edit Contact** page to add, edit, or view additional information related to the contact.
- 8. Click the *Save* button to save the contact information.

Adding/Editing an Address

To add a new address

- 1. In the Addresses tab, click Add new address....
- 2. Select the **Primary** check box if the address will be the primary address for the contact.

You can select any address as Primary, however only one address can be marked as Primary at a time.

- 3. Type a date in the **Start Date** field to indicate the date the contact can be reached at the address.
- 4. Type a date in the **End Date** field to indicate the date the contact can no longer be reached at the address.
- 5. Select a type in the **Address Type** box to indicate the type of address you are adding.
- 6. Type a street number and name in the **Address Line One** box.
- 7. Type any additional street address information in the Address Line Two box.
- 8. Type the name of the city in the **City box**, and then select a state in the **State** box.
- 9. Type the zip code for the address in the **Postal Code** box.
- 10. Click the *Save and Return* button to return to the Edit Contact page.

NOTE: You can add as many addresses as needed for the contact.

To edit an address

- In the Addresses tab, click the Edit button. The Edit Address page displays.
- 2. Make any necessary changes to the address, and then click the *Save and Return* button to return to the Edit Contact page.

Phone/E-mail Tab

The Phone/E-mail Tab on the Edit Contact page allows you to add multiple phone numbers and e-mail addresses to a contact record.

To add phone and e-mail information for the contact

- 1. In the **Home Phone** box, type the contact's home phone number.
- 2. In the **Work Phone** box, type the contact's work phone number.
- 3. In the **ext** box, type an extension for the contact's work phone number.
- 4. In the Fax box, type the contact's fax phone number.
- 5. In the **Mobile** box, type the contact's cell phone number.
- 6. In the **E-mail** boxes, type the primary e-mail address for the contact.
- 7. In the **E-mail Two** boxes, type an additional e-mail address for the contact.
- In the URL box and type a valid Web address to include a Web site for the contact. The URL must be correctly formatted, for example: http://www.imperisoft.com
- 9. If the **URL** box contains a Web address, click the *Contact Web site* button to open the Web site in a new browser window.
Adding/Editing/Deleting a Note

The Add and Edit Note pages allow you to create a note for a contact, view the details of a note, schedule a follow up, or delete an existing note.

To add a note to a contact

- 1. Click the **Notes** tab on the **Edit Contact** page. This applies to contacts of all categories.
- 2. Click **Add new note...** at the bottom of the notes grid. The Add Note page displays.
- 3. In the Info section, select a type in the Note Type box.
- 4. Click in the **Subject** box and type a subject for the note.
- 5. Click the **Body** tab, and then type the content of the note in the **Note** box.
- 6. Click the button to save the note.
- 7. Use the **Follow Ups** tab to schedule a reminder to follow up with the contact.

To edit or view the details of a note

- 1. Click the **Notes** tab on the **Edit Contact** or **Edit Account** page.
- 2. Click the *Edit* button next to the note you want to view.
- 3. Click the **Body** tab to view the details of the note.

NOTE: You cannot edit the details of a note. If necessary you can delete the note and create a new one.

- 4. Click the **Follow Ups** tab to schedule a follow up to the note.
- 5. Click the *Cancel* button to return to the Notes tab.

To delete a note

- 1. Click the **Notes** tab on the **Edit Contact** or **Edit Account** page.
- 2. Click the *Edit* button next to the note you want to delete.
- 3. If the note has an scheduled or completed <u>Follow-ups</u>, you must first delete them.
 - To delete a follow-up,
- 4. Click the *Delete* \times button on the toolbar.
- 5. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a note that has follow ups without first <u>deleting the</u> <u>follow ups</u>.

Imperisoft ARS

Scheduling/Editing a Follow Up

Follow ups are reminders to follow-up with a contact, such as calls to be returned or payment to be collected. Follow-ups are connected to notes, so a <u>Note</u> must first be created for a contact, then you can schedule a follow-up to that note.

To schedule a follow up

- 1. On the Edit Note page, click the Follow Ups tab.
- 2. Click Add new follow up....
 - The Add Follow Up page displays.
- 3. Click in the **Type** box and select a follow up type from the list.
- 4. Click in the **Follow Up By Date** box and type a date the follow up should be completed.
- 5. Click in the **Time** box and select a time from the list.
- 6. Click the **Comments** tab, and then type the information for the follow up.
- 7. Click the *Save and Return* button to return to the Edit Note page.

To edit a follow up

- 1. On the Edit Note page, click the Follow Ups tab.
- 2. Click the *Edit* button next to the follow up you want to edit. The Edit Follow Up page displays.
- 3. Click in the **Type** box to change the follow up type.
- 4. Click in the **Follow Up By Date** box and type a date the follow up should be completed.
- 5. Click in the **Time** box to change the time the follow is due.
- 6. Click the **Comments** tab, and then type to change or add comments to the follow up.
- 7. Click the *Save and Return* button to return to the Edit Note page.

To delete a follow up

- 1. On the Edit Note page, click the Follow Ups tab.
- 2. Click the *Edit* button next to the follow up you want to delete.
- 3. Click the *Delete* \times button on the toolbar.
- 4. Click **Yes** to confirm the deletion.

Categories Tab

The Categories tab on the Edit Contact page displays the <u>Contact Categories</u> assigned to the contact.

To assign contact to a category

1. From the **Categories** tab on the contact, click **Manage contact** categories....

The Manage Contact Categories page displays.

2. Select the check-box for all available categories you want to assign to the contact.

To remove a category, simply clear the check box next to the category you want to remove.

3. Click the *Save and Return* button to return to the **Categories** tab.

Working with Students

The Student category designates a contact as a Student. Contacts are automatically added to this category upon program registration however you can always manually add the Student category to a contact record through the Categories tab on the Edit Contact page.

To add a new student to the system

• In the Contact Search Results grid, click **Add new student...**and then complete the information in the <u>Add Contact</u> page.

To designate an existing contact as a student do one of the following

- Click the **Categories** tab in the **Edit Contact** page, and then click <u>Manage</u> <u>Contact Categories...</u> to add the Student category.
- <u>Register the contact</u> for a program.

Use the contact tabs in the Edit Student page to manage and view information about the student.

Adding an Adult Student

To add an adult student

- 1. On the contacts menu, click All Contacts.
- 2. Click **GO** to display the Search Results grid, and then click **Add new student...** at the bottom of the page.
- 3. Select an account type in the **Account Type** box.
- 4. Type the student's *Last Name*, *First Name* in the **Account Name** box.
- Select a contact type in the Account Contact Type box to indicate the relationship of the contact to the account.
 For an adult student, this might be "General".
- If applicable, use the <u>Status</u>, **Title**, and **Salutation** boxes to include more information about the student.
 Salutation would be the customer's nick name or informal name if he or she should be referred to as something other than what is typed in the First Name field.
- 7. Type the full name of the student in the **First Name**, **M.I.**, and **Last Name** boxes.
- 8. Click the *Save* button at the top of the page.
- 9. Use the tabs at the bottom of the Edit Student page to include additional information about the student.
- 10. Click the **Registrations** tab, and then click the **Register student for classes...** link to register the student for a class.

Adding a Child Student

To add a child student if the child's family account does not yet exist

- 1. On the contacts menu, click All Contacts.
- 2. Click **GO** to display the Search Results grid, and then click **Add new contact...** at the bottom of the page.
- 3. Select **Family** in the **Account Type** box, or choose the approved account type in your organization for a family account.
- 4. Type the parent's Last Name, First Name in the Account Name box.

NOTE: The account in Imperisoft should be named after the parent, or the primary person responsible for payment.

- Select **Parent** in the **Account Contact Type** box, or the appropriate contact type for the primary contact on the account. The Account Contact Type indicates the relationship of the contact to the account.
- 6. If applicable, use the **Title**, and **Salutation** boxes to include more information about the primary contact.

Salutation would be the contact's nick name or informal name if he or she should be referred to as something other than what is typed in the First Name field.

- 7. Type the full name of the parent or primary contact in the **First Name**, **M.I.**, and **Last Name** boxes.
- 8. Click the Save button at the top of the page.
- 9. Use the tabs at the bottom of the Edit Contact page to include additional information about the parent (primary contact).
- 10. To then add the child, click the **Accounts** tab, and then click the *Edit*

button next to the account name.

- 11. In the Edit Account page, click the **Contacts** tab, and then click **Assign new contact...**
- 12. Click **GO** to display the Search Results grid, and then click **Add new contact...** at the bottom of the page.
- 13. Type the full name of the child the First Name, M.I., and Last Name boxes.
- 14. Click the *Save and Return* button at the top of the page.
- 15. In the Assign Account Contact page, select **Child** as the **Account Contact Type**, and then click the *Save and Return* **button**.
- 16. Repeat steps 12 15 for each additional child you would like to add to the account.

To add a child student if the child's family account is already in they system

- 1. On the accounts menu, click Accounts.
- 2. Use the Search Filters to search for the family's account.
- 3. Once you have located the family's account, click the *Select solution*.
- 4. In the Edit Account page, click the **Contacts** tab, and then click **Assign new contact...**

- 5. Click **GO** to display the Search Results grid, and then click **Add new contact...** at the bottom of the page.
- 6. Type the full name of the child the First Name, M.I., and Last Name boxes.
- 7. Click the *Save and Return* button at the top of the page.
- 8. In the Assign Account Contact page, select **Child** as the **Account Contact Type**, and then click the **Save and Return b** button.
- 9. Repeat steps 5 8 for each additional child you would like to add to the account.

Registering a Student

To register a student for a program

- 1. Do one of the following to open the **Register Student for Programs** page.
 - In the **Contact Search** results page, click **Register** next to the student you want to register.
 - In the Edit Student page, click the Registrations tab, and then click Register student for programs....
- Click in the Semester box and select a program group or semester, and then click Go to search for the program, or use one or more of the following search criteria:
 - In the **Location** box, select a location.
 - In the **Program Type** box, select a program type.
 - Select the **Bundles** radio button to search for bundles.
- 3. Click the heading of a column in the **Available Programs** grid to sort the list of programs by that criteria.
- 4. Select the check box next to the program or programs you want.
- 5. If there are available seats, you can either register the student or wait list the student for the program by clicking the **Wait List** radio button.
 - If the program is full, **Wait List** is automatically selected, and the **Register** radio button is disabled.
- 6. If the program selected it a Recurring type program, you must select a start date from the **Start Date** box.
- 7. To apply a coupon code for a customer, select a code from the <u>Coupon Code</u> box in the Student section of the Register Student page.
- 8. Click the *Save* 🖥 button.
- 9. Click **OK** in the confirmation box to complete the registration. The Registration Results page displays.
 - Click the **Make Payment** link to post a payment for the registration.
 - Click the *Edit* button if you need to make changes to the registration.

Wait Listing a Student

If a student wants to register for a program that is full, you can wait list the student.

To wait list a student

- 1. Do one of the following to open the **Register Student for Programs** page.
 - In the **Contact Search** results page, click **Register** next to the student you want to wait list.
 - In the Edit Student page, click the Registrations tab, and then click Register student for programs....
- 2. Click in the **Select a semester** box, and then select the appropriate semester.

The Available Programs grid displays.

- 3. Select the check box next to the program.
 - If the program is not completely full, but you want to wait list the student, click the radio button next to **Wait List**.
 - If the program is full, the radio button next to **Wait List** will be preselected.
- 4. Click the *Save* 🖥 button.
- 5. Click **OK** in the confirmation box to complete the registration. The Registration Results page displays.
- 6. Click the *Edit* button if you need to make changes to the registration.

To register a wait listed student

- 1. Open the **Edit Registration** page *for the wait listed registration*.
 - 1. In the **Student Search** results page, click the **Select** button next to the student you want to remove from a wait list.
 - 2. Click the **Registrations** tab, and then click the *Edit* button next to the wait listed registration.
- 2. Click the **Register** link at the top of the page.
- 3. Click **OK** to confirm that you want to move the student from wait listed to registered for the program.

To remove a student from a wait list

- 1. Open the Edit Registration page for the wait listed registration.
 - 1. In the **Student Search** results page, click the **Select** button next to the student you want to remove from a wait list.

- 2. Click the **Registrations** tab, and then click the *Edit* button next to the wait listed registration.
- Click the **Remove from Wait List** link at the top of the page.
 Click **OK** to confirm that you want to remove the student from the wait list.

Editing a Registration

The Edit Registration page allows you to change the start date, register a wait listed student, remove a student from a wait list, drop a program, withdraw a student from a program, transfer a student to a different program, add a grade or mark, as well as view and edit associated transactions.

To edit a registration

- 1. Click the Registrations tab on the Edit Student or Edit Program page.
- Click the *Edit* sutton next to the registration you want to change. The Edit Registrations page opens.
- 3. The following options are available in the Edit Registration page:
 - If the student is currently wait listed for the program but there are seats open, you can click the **Register** link in the toolbar to <u>register</u> <u>the student</u> for the program.
 - If the student is currently wait listed for the program, you can click the Remove from Wait List link in the toolbar to <u>remove the student</u> from the list.
 - Click the **Transfer** link in the toolbar to transfer the student to a different program.
 - Click the **Drop** link in the toolbar to <u>drop the program</u>.
 - If confirmation letters for programs within the semester have already been printed, you can click the **Reprint Confirmation Letter** link to print the confirmation letter again.
 - Click the student's name in the **About** section to open the **Edit Student** page.
 - Click the program name in the **About** section to open the **Edit Program** page.
 - Click the account name in the **About** section to open the **Edit Account** page.
 - Click the invoice number in the **About** section to open the **Edit Invoice** page.
 - Use the **Transactions** tab to view transactions related to the registration.
 - Click in the **Student Start Date** box to change the start date of program.

This box applies to Recurring type programs only.

• If the program has already begun, you can type a date in the **Scheduled Withdrawal Date** box to withdraw the student from the program.

This box applies to Recurring type programs only.

• Click the **Exam Taken?** check box to note that an exam was taken for the program.

NOTE: If the program is completed, you will need to <u>Reopen the</u> <u>program</u> temporarily to mark that an exam was taken.

• Click in the Mark box to select a mark or grade for the student.

NOTE: If the program is completed, you will need to <u>Reopen the</u> <u>program</u> temporarily to add the mark or grade.

4. Click the *Save* 🖥 button if any changes were made to the registration.

Dropping a Program

The Drop Program page allows you to select a drop fee or issue a refund when a student drops a program.

To drop a student from a program

- 1. Click the **Registrations** tab on the **Edit Student** or **Edit Program** page.
- 2. Click the *Edit* button next to the registration you want to drop. The Edit Registrations page opens.
- 3. Click the **Drop** link at the top of the **Edit Registration** page.
- 4. Select one of the following **Drop Fee** radio buttons:
 - **None** Tells the system to reverse tuition balance transactions for the registration.
 - **Cancellation Fee (\$)** Tells the system to reverse tuition balance transactions for the registration and then to charge a pre-specified <u>cancellation fee</u>.
 - **Tuition Fee (\$)** Tells the system to leave the full tuition balance transaction in place.
- 5. Select the **Refund Deposit** check-box if the student is eligible for a refund. If no deposit was made, the Refund Deposit box will be disabled.
- 6. Click the *Save* button, and then click **OK** on the confirmation box to complete the process.

Deleting Accounts and Contacts

When a customer leaves your organization or for some reason you no longer need them in the system as an active account or contact you can use the **Active** checkbox on the Edit Account, Edit Contact, and Edit Account Contact pages to indicate the new status. If necessary, you can choose to <u>delete them entirely from the system</u>.

To mark an account as inactive

• In the **Edit Account** page, clear the **Active** check-box, and then click the *Save* button.

To mark a contact as no longer active on a specific account

- 1. In the Edit Account page, select the Contacts tab.
- 2. Click the **Account Contact Type** to the left of the contact you wish to inactivate for the account.
- 3. In the **Edit Account Contact** page, clear the **Active?** check-box, and then click the *Save and Return* button.

To mark a contact as no longer active in your system

• In the **Edit Contact** page, clear the **Active** check-box, and then click the *Save* button.

If you need to remove an account or contact entirely from your system, you need to first be sure that any associated data is deleted. The system is designed to help to prevent accidental deletion of important historical data, therefore, depending on the amount of data tied to a contact or account, it can take multiple steps to clear the associated data.

To delete an account

In the **Edit Account** page, click the *Delete* \times button at the top of the page. If successful, all associated contacts will also be deleted.

- If there is an invoice attached to the account you must first <u>delete the</u> <u>invoice</u>.
- If there is a payment posted to the account, you must first <u>delete the payment</u>.
- If a contact on the account has any registrations you must first <u>delete</u> <u>the registrations</u>.

 If a contact on the account has any notes, you must first <u>delete the</u> <u>notes</u>.

To delete a contact

In the Edit Contact page, click the *Delete* \times button at the top of the page.

- If the contact is marked as Primary, Billing or Emergency, it cannot be deleted from the account. You must first designate a different contact on the account as Primary, Billing and Emergency.
- If the contact is the only contact on the account, the entire account must be deleted or another contact must be added to the account and made Primary, Emergency and Billing before it can be deleted.
- If a contact on the account has any registrations you must first <u>delete</u> <u>the registrations</u>.
- If a contact on the account has any notes, you must first <u>delete the</u> <u>notes</u>.

To delete a registration

- 1. Click the **Registrations** tab on the **Edit Student** or the **Active Registrations** tab on the **Edit Account** page.
- 2. Click the *Edit d* button next to the registration.
- All associated transactions must first be removed, so click the *Edit* button next to each transaction in the **Transactions** tab, and in the **Edit Transaction** page, click the **Void Transaction** link.

NOTE: By voiding the transaction you are removing it permanently from the system. There is no way to retrieve a voided transaction.

4. Once all transactions have been voided, in the **Edit Registration** page, click the *Delete* \times button at the top of the page.

NOTE: Under the following conditions a registration may not be able to be deleted:

- If attendance is taken for the student for the registered class
- If the registration was involved in a transfer from or a transfer to another class

If the registration cannot be deleted, you will simply have to mark the account and contacts as inactive using the steps above.

Other Contacts

Contact Categories

Contact Categories allow you assign different roles to a contact. By assigning different categories you are able to organize different contact related information in a logical format.

The Imperisoft system is designed with five standard contact categories, however you can add as many custom categories as is necessary for your organization.

The standard contact categories are:

- Student
- Instructor
- Donor
- Board Member
- Model

The five standard categories are system-generated and cannot be deleted or removed from the system, however there is no limit to the number of additional categories that your organization can create.

For more on creating new categories and managing existing ones, please refer to <u>Managing Contact Categories</u>.

You can use <u>Contact Categories</u> to sort or categorize contacts according to their roles or associations, conduct business with and market to specific groups through mass e-mail functionality, register students for courses, organize program schedules and so on.

Adding an Instructor

To add an instructor

- 1. On the contacts menu, click Instructor.
- 2. Click **GO** to display the Search Results grid, and then click **Add new instructor...** at the bottom of the page.
- 3. Select an account type in the **Account Type** box.
- 4. Type the contact's Last Name, First Name in the Account Name box.
- Select a contact type in the Account Contact Type box to indicate the relationship of the contact to the account. For example "General".
- 6. Type the full name of the contact in the **First Name**, **M.I.**, and **Last Name** boxes.
- 7. Click the **Instructor** tab and complete the information.
- 8. Click the *Save* button at the top of the page.
- 9. Use the tabs at the bottom of the Edit Instructor page to include additional information about the contact.

NOTE: You can also add a new Instructor to the system in while <u>adding or</u> <u>editing a program</u>.

Instructor Tab

The Instructor tab on the Edit Instructor page allows you to include general information about the Instructor.

To complete information in the Instructor tab

- 1. Select the Active Instructor check box to indicate that the contact is an active Instructor.
- 2. In the **Instructor Type** box, select an instructor type.
- In the Status box, type information about the status of the instructor.
 Click the Save abutton to save the information.

Bio Tab

The Bio tab on the Edit Instructor page allows you to create an instructor biography. If the instructor is associated to a program that has been made available for online registration, the bio information will display online with the program description and instructor photo.

To add an instructor biography

- 1. Click in the **Bio** box on the **Bio** tab.
- 2. Type the information to be included in the biography.
- 3. Click the **Save** button to save the information.

Adding a Donor

To add a donor

- 1. On the contacts menu, click Donor.
- 2. Click **GO** to display the Search Results grid, and then click **Add new donor...** at the bottom of the page.
- 3. Select an account type in the **Account Type** box.
- 4. Type the contact's Last Name, First Name in the Account Name box.
- Select a contact type in the Account Contact Type box to indicate the relationship of the contact to the account. For example "General".
- 6. Type the full name of the contact in the **First Name**, **M.I.**, and **Last Name** boxes.
- 7. Click the **Donations** tab to add donation information.
- 8. Click the *Save* button at the top of the page.
- 9. Use the tabs at the bottom of the Edit Donor page to include additional information about the contact.

Adding/Editing a Donation

In order to record a donation that you have received from a contact you must first categorize the contact as a Donor contact, then you can add the donation information.

To add a donation

- 1. Using the <u>Search functionality</u>, locate the contact that is making the donation.
- 2. If the contact is already categorized as a donor, use the Donor Search from the contacts menu.
- 3. If the contact is not yet categorized as a donor.
- 4. Select the contact from the contacts search, or take the necessary steps to add a new contact.
- 5. Click the **Categories** tab, and then click the *Edit* button next to the **Donor** category.

The Edit Donor page displays.

NOTE: If donor is not displayed as an available category, click <u>Manage</u> <u>contact categories...</u> and proceed to add the Donor category to the contact.

- 6. Click the **Donations** tab, and then click **Add new donation...**.
- 7. In the **Type** box, select a donation type.
- 8. In the **Donation Date** box, type the date the donation was made.
- 9. In the **Amount** box, type the amount of the donation.
- 10. In the **Description** tab, type a description.
- 11. Click the **Donation Use** tab, and then type the information to describe the intended use of the donation money.
- 12. Click *Save* Hoto save the changes.

To edit a donation

- 1. Open the Edit Donation page.
- 2. Perform a <u>Donor search</u> to locate the contact that made the donation.
- 3. Select the contact in the search results to open the **Edit Donor** page. The Edit Donor page displays.
- 4. Click the **Donations** tab, and then click the *Edit* button next to the donation you want to edit.
- 2. Make any necessary changes to the donation boxes, and then click the *Save* button to save the changes.

Adding a Board Member

To add a board member

- 1. On the contacts menu, click Board Member.
- 2. Click **GO** to display the Search Results grid, and then click **Add new board member...** at the bottom of the page.
- 3. Select an account type in the **Account Type** box.
- 4. Type the contact's *Last Name, First Name* in the **Account Name** box.
- Select a contact type in the Account Contact Type box to indicate the relationship of the contact to the account. For example "General".
- 6. Type the full name of the contact in the **First Name**, **M.I.**, and **Last Name** boxes.
- 7. Click the **<u>Board Member tab</u>** and complete the information.
- 8. Click the *Save* button at the top of the page.
- 9. Use the tabs at the bottom of the Edit Board Member page to include additional information about the contact.

Board Member Tab

The Board Member tab on the Edit Board Member page allows you to change membership information for a board member.

To add or change membership information

- 1. Select the **Active Board Member** check box to mark the membership as active.
- 2. In the **Position** box, type the position the board member holds.
- 3. In the **Term Start Date** box, type a membership start date.
- 4. In the Term End Date box, type a membership end date.
- 5. Click *Save* 🖥 to save the changes.

Adding a Model

To add a model

- 1. On the contacts menu, click Model.
- 2. Click **GO** to display the Search Results grid, and then click **Add new model...** at the bottom of the page.
- 3. Select an account type in the **Account Type** box.
- 4. Type the contact's Last Name, First Name in the Account Name box.
- Select a contact type in the Account Contact Type box to indicate the relationship of the contact to the account. For example "General".
- 6. Type the full name of the contact in the **First Name**, **M.I.**, and **Last Name** boxes.
- 7. Click the **Model** tab and complete the information.
- 8. Click the *Save* button at the top of the page.
- 9. Use the tabs at the bottom of the Edit Model page to include additional information about the contact.

Marketing and Communication

Marketing and Communication

The <u>search</u> functionality and <u>contact categories</u> allow you to market and communicate directly from within the application to any single, group, or entire list of contacts.

Contact information can be searched for, creating a unique contact list that can be exported into various file types or <u>e-mailed directly</u> with all communications history being saved to the contact's notes history within the application.

When <u>sending e-mails</u> they are delivered individually from the application with a selectable "reply to" field. Organizations can manage "opt in" lists separately for newsletters and other forms of communications.

You can manage multiple<u>contact addresses</u>, track <u>referral sources</u>, and recognize dynamic relationships. E-mail correspondence may contain merge fields, <u>have files</u> <u>and images attached</u>, and may even be written in html format.

Using Search

The Imperisoft Search functionality allows you to locate accounts, contacts, and various contact related information such as credit cards, notes, follow-ups and addresses, as well as program related data such as semesters, programs and registrations. You can also use Search to export a list of results to Microsoft Excel or to <u>e-mail a group</u> of contacts.

It is very important that you fully understand how to use the Search functionality in Imperisoft. In most cases you must go through the Search page for an item in order to create a new item.

To use search

- Click **accounts** on the menu bar to open the Account Search page.
- Select **All Contacts** from the **contacts** menu to open the Search for All Contacts page or select any one of the contact category searches.
- Select Notes, Follow-Ups, Addresses, or Credit Cards from the contacts menu to search for related information.
- Select **Memberships** from the **accounts** menu to open the Memberships Search page, or select **Members** from the **contacts** menu to open the Member Search page.
- Select **Semesters** from the **courses** menu to open the Semester Search page.
- Select **Programs** from the **courses** menu to open the Program Search page.
- Select **Bundles** from the **courses** menu to open the Bundle Search page.
- Select **Currently Registered Students** or **All Registrations** from the **courses** menu to search for registrations.
- Select Search for Invoices, Search for Payments or Search for Transactions from the accounting menu to perform payment and transaction related searches.

Every search page is set up with the same basic components: Saved Searches, <u>Filters</u>, <u>Result Fields</u>, <u>Sorting</u> and <u>Search Results</u>.

The Saved Searches section allows you to save the Filter, Result Fields and Sorting options set for a particular search and save those settings for future use. Click here for more information about how to Save a search.

Search Filters allow you to specify who or what you would like to search for.

To apply Search Filters to your search

- 1. Click the *chevron icon* to expand the filters grid.
- 2. Click Add Filter.
- 3. Select a field on which to search from the **Field** box.
- 4. Select an appropriate operator from the **Operator** list.
- 5. Click in the **Value** box, type a value.
- 6. Repeat steps 2 6 to add additional filters to the search.

7. Click **Go** to execute the search.

The Result Fields allow you to choose how your search results are displayed before you perform a search.

To choose what displays in the Search Result

- 1. Click the chevron icon to display the **Result Field** check boxes. By default, all fields are selected to display in the search results.
- 2. Clear the check box next to any fields you wish to remove from the list, and select the check box next to any fields you want to add to the search results.
- 3. Click **Select/Clear All** to select all the boxes at once or to clear all the boxes at once.
- 4. Click **Go** to execute the search.

The Sorting feature allows you to determine *how the results of a search are sorted* when they are displayed.

For example, when searching for accounts from the Account Search page, the records by default are sorted by account ID. You might however decide that you would prefer to sort them alphabetically by Account Name.

Each standardized search allows for up to three sort filters to be applied. The second and third sort filters will *sort sets of results within your results* where there are multiple recurrences of the same name or identification tag.

For example, if in the results of your search the system returns 25 instances of the name Jane Smith, you can opt to have those 25 records placed in a certain order as well. By specifying a second sort filter such as "r; ID," those 25 instances of Jane Smith records will be listed in numerical order by ID numbers.

To use Sorting

- 1. Click the chevron icon to display the **Sorting** boxes.
- 2. Click in the first drop-down menu and select which section you would like to see sorted.
- 3. Click the **Ascending** radio button to sort the results in ascending order, or choose the **Descending** radio button to sort the results in descending order.
- 4. Click **Go** to execute the search.

The Search Results displays the results of your search.

To use the Search Results

- Click in the Show records per page drop-down box and select the number of records you want to display on each page of your results.
 Page numbers will appear in the blue footer at the bottom right-hand corner of the results grid. Click on a number to view the results page by page.
- Click Go to activate the search.
 Once your result list displays, you can choose from any of the following actions:
 - Click **Export to Excel** to export the results of your search to a Microsoft Excel spreadsheet.
 - Click <u>E-mail this Group</u> to send an e-mail to each of the records in the result list.
 - To edit a record do one of the following:

Click the *Edit* button at the right of the record you want to edit.

Click the **Select** button at the right of the contact you want to edit.

• Click the **Add New** link at the bottom of the page to create a new record.

The Add New link options will vary, depending on the context of the search and the access rights you have been granted.

- Use the **Showing** numbers in the lower left corner of the page to see the total number of records returned by the search.
- Use the **Go to page** numbers in the lower right corner of the page to jump to another page of results.
- Click the **ellipsis** (three periods) in the lower right corner to jump to the next group of ten pages.

Sending an E-mail Message

You can send an e-mail message to a contact from any Edit Contact page.

To send an e-mail message to a contact

- In the <u>Edit Contact page</u>, click the *E-mail Contact* button. The Send E-mail(s) page displays.
- 2. In the **From (name)** box, change the display name if necessary.
- 3. In the **From (e-mail address)** box, change the sender's e-mail address if necessary.
- 4. In the **Subject** box, type the subject of the message.
- 5. In the **Body** section, type the body of the e-mail, and use the formatting toolbar to format the text and layout of the message, <u>insert a link to a file</u>, or merge data.
- 6. Click the *Preview* button to view how the e-mail will appear to the recipient.
 - In the **E-mail Preview** page, click the *Send Test E-mail To Myself*
 - button to send a test e-mail to your e-mail address.
 - Click the Cancel Subtron to return to the Send E-mail(s) page
- 7. When you have finished formatting the message, click the *Send E-mail* Button.

Linking a File to an E-mail Message

Use the File Library to create a link to a file to in e-mail message sent from within the Imperisoft system.

To create link to a file

- 1. In the Send E-mail(s) page, type the message in the **Body** section.
- 2. Highlight the word or phrase you want to link to the file, and then click the

Insert Link to File [●] button. The File Library window opens.

- 3. Do one of the following:
 - If the file you want to link to exists in the File Library, skip to step 4.
 - If the file you want to link to does not exist in the File Library, follow the steps to *upload the file*.
 - 1. Click **Browse** and locate the file you want to add to the library.
 - 2. In the **Open File** window, select the file, and then click **Open**.
 - 3. In the **Select a type** box, select the file type you are adding to the library.
 - 4. In the Enter a Description box, type a description of the file.
 - 5. Click Upload.
- 2. In the **Existing Files** box, click **Create Link** next to the file. The word or phrase highlighted in step 2 will display in blue. When the recipient receives the e-mail, they can click on the link to download the file.

Sending an E-mail to a Group

You can send an e-mail to a group of contacts from the Account search, any of the Contact searches or from the Currently Registered Students and All Registrations searches.

To send an e-mail to a group

- 1. Locate a list of contacts to which you would like to send the e-mail using the appropriate <u>search</u>.
- 2. Click the **E-mail This Group** link once you have reviewed the results of your search.
- 3. If using the **Currently Registered Students** or **All Registrations** searches from the **programs** menu, the **Select E-mail Recipient Type** page displays.
 - Select one or more of the available options to choose which contacts related to the registration you would like to send the e-mail to, and then click **Continue...**.
- 4. In the the **Send E-mail(s)** page, confirm that the number listed next to **# Recipients** matches the number you expected from your search results. If it does not, you might need to cancel out of the new message, and resolve any contacts with missing or incorrectly formatted e-mail addresses.
- 5. In the **Subject** box, type the subject of the message.
- 6. In the **Body** section, type the body of the e-mail, and use the formatting toolbar to format the text and layout of the message, <u>insert a link to a file</u>, or merge data.
- 7. Click the *Preview* button to view how the e-mail will appear to the recipients.
 - Click the **Next** and **Previous** links to view each e-mail.
 - Click the Send Test E-mail To Myself button to send a test e-mail to your e-mail address.
- 8. Click the *Cancel* Sutton when you are done previewing the message.
- 9. When you have finished formatting the message, click the *Send E-mail* Button.

Working with Accounts

Adding/Editing a Payment

The Payments tab on the Edit Account page displays records of all payments that have been received for an account and allows you to add a payment.

To add a payment to an account

- 1. Click on the **Payments** tab on the **Edit Account** page.
- 2. Click **Add new payment...** at the bottom of the grid. The Add Payment page displays.
- 3. Type the dollar amount of the payment in the Amount box.
- 4. Click in the **Payment Method** box to select a form of payment.
- 5. If the customer is paying by Credit Card, do one of the following:
 - If the credit card has already been processed outside of Imperisoft select **Credit Card**.
 - If the credit card should be processed online, via the Imperisoft ARS System, select **Online Credit Card**, and then complete the **Credit Card** information.
- 6. Click in the **Post Date** box to change the date the payment is to be posted. The Post Date defaults to the current date.
- 7. Click in the **Reference Number** box and type a reference number if needed. This is an optional field but is useful for detailed record keeping.
- 8. Click in the **Memo** field and type any necessary notes.
- 9. Click the *Save* button when all information has been entered, and then apply the payment to open charges.
 - a. Click **Apply Payment** to open the **Apply Payment** dialog box. The Apply Payment dialog box contains a grid that displays all of the current open charges for the account.
 - b. Select the check box in the **Pay** column for the charges you want to apply payment to.
 - c. Click in the **Payment** box to change the amount being applied if needed.
 - d. Click *Save* hwhen you have finished selecting outstanding charges.
 - e. Click **OK** to confirm the transaction and close the Apply Payment dialog box.

The applied payment displays in the Transactions tab.

10. Click **Print Receipt** to print a receipt for the payment.

To edit a payment

- 1. Click on the **Payments** tab on the **Edit Account** page.
- 2. Click the *Edit* button next to the payment you want to change.
- 3. If the payment is applied to any transactions, you will first need to unapply the payment from each transaction.

- Click the *Edit* button next to each transaction in the **Transactions** tab, and in the **Edit Transaction** page, click the **Void Transaction** link.
- 4. Once all transactions have been voided (payment has been unapplied), you do the following:
 - Click in the **Amount** box to change the payment amount.
 - Select a different form of payment in the **Payment Method** box.
 - Click in the **Post Date** box to change the post date of the payment.
- 5. Click the *Save* button when your changes are complete, and then <u>apply the</u> <u>payment to open charges</u>.

To delete a payment

- 1. Click on the **Payments** tab on the **Edit Account** page.
- 2. Click the *Edit* button next to the payment you want to delete.
- 3. If the payment is applied to any transactions, you will first need to unapply the payment from each transaction.
 - Click the *Edit* is button next to each transaction in the **Transactions** tab, and in the **Edit Transaction** page, click the **Void Transaction** link.
- 4. Once all transactions have been voided, click the *Delete* \times button at the top of the page.

WARNING: By deleting the payment you are removing it permanently from the system. There is no way to retrieve a deleted payment.
Printing a Receipt

You can print a receipt for a payment from the Edit Payment page or directly from the Payments tab. You can also export a receipt to PDF or Excel file.

To print a receipt

- 1. Click on the **Payments** tab on the **Edit Account** page and do one of the following
 - Click the *Print Receipt* button next to the payment. The receipt will be sent to your printer and display in the report preview at the bottom of the page.
 - Click the *Edit* button next to the payment, and then click the **Print Receipt** link at the top of the page.

 The receipt will be sent to your printer and display in the report
 preview at the bottom of the page.
- 2. To export the receipt to a PDF or Excel file, click in the **Export** box, select a format, and then click **Export**.

Adding/Editing an Invoice

You can add a new invoice to an account or edit an existing invoice to change the due date, add charges or make changes to existing charges.

To add a new invoice

- 1. Click on the Invoices tab on the Edit Account page.
- 2. Click **Add invoice...** at the bottom of the grid. The Add Invoice page displays.
- 3. If needed, click in the Invoice Date box to change the invoice date.
- 4. Click in the **Due Date** box to change the invoice due date.
- Click the *Save* button to save the invoice. This must be done prior to adding transactions.
- 6. Click the **Transactions** tab to <u>add transactions</u> to the invoice.
- 7. Click the **Internal Comments** tab to type any internal information about the invoice.
 - This information does not display on the invoice.
- 8. Click the **Customer Comments** tab and type any text you want to include in the conclusion section of the invoice.
- 9. Click the *Save and Return* button to save the invoice and return to the **Edit Account** page.

To edit an existing invoice

- 1. Click on the Invoices tab on the Edit Account page.
- 2. Click the *Edit* button next to the invoice you want to change.
- 3. Click in the **Invoice Date** box to change the invoice date.
- 4. Click in the **Due Date** box to change the invoice due date.
- 5. Click the **Transactions** tab to <u>add transactions</u> to the invoice.
- 7. Click the *Edit* button next to the transaction to <u>add a manual credit or</u> <u>manual debit</u> to the invoice.
- 8. Click the **Internal Comments** tab to type any internal information about the invoice.

This information does not display on the invoice.

- 9. Click the **Customer Comments** tab and type any text you want to include in the conclusion section of the invoice.
- 10. Click the *Save and Return* button to save the invoice and return to the **Edit Account** page.

To delete an Invoice

- 1. Click on the **Invoices** tab on the **Edit Account** page.
- 2. Click the *Edit* button next to the invoice you want to delete.
- 3. If there are any registration fees or tuition fees within the invoice that are tied to a registration, you must first <u>delete the registrations</u>.
- 4. If there are transactions in the **Transactions** tab of the invoice, you must first void them.
 - Click the *Edit* button next to each transaction in the **Transactions** tab, and in the **Edit Transaction** page, click the **Void Transaction** link.

NOTE: By voiding the transaction you are removing it permanently from the system. There is no way to retrieve a voided transaction.

- 5. If the **Customer Comments** tab or **Internal Comments** tab contain any data, you must clear the data.
- 6. In the Edit Invoice page, click the *Delete* \times button on the toolbar.
- 7. Click **Yes** to confirm the deletion.

Invoices Tab

The Invoices tab on the Edit Account page allows you to print or edit existing invoices as well as create new invoices. An invoice is generated each time a student is registered into a program.

Column	Description
Invoice #	Displays the invoice number.
Invoice Date	Displays the date the invoice was created.
Due Date	Displays the invoice due date.
Balance	Displays the total balance due for the invoice.
Invoiced	Check mark indicates the invoice has been printed.
Needs Invoiced	Check mark indicated the invoice has not been printed.
Print ^{See} Invoice Button	Click to <u>print the invoice</u> .
Edit 🕑 Button	Click to view or <u>change the invoice</u> .

Click <u>Add invoice...</u> at the bottom of the grid to add a new invoice to the account.

Printing Invoices

You can print a single invoice for an account from the Invoices tab on the Edit Account page or print all invoices that have not yet been printed or marked as invoiced from the accounting menu. When you choose to print an invoice or a group of invoices, you have the option to mark those invoices as printed or "Invoiced".

To print a single invoice

- 1. Click the **Invoices** tab on the **Edit Account** page.
- Click the *Print Invoice* button next to the invoice you want to print. The Print Invoices page displays.
- Click the *Print* button.
 A preview of the invoice displays on the page and is sent to your default printer.
 - Click the Save button to update the printed flag for the registrations associated to account.

This will mark the invoice as Invoiced.

- OR -

• Click the *Cancel* button to exit the Print Invoices page without updating the printed flag for the invoice.

To print all invoices for a single account

- 1. Click the Invoices tab on the Edit Account page.
- 2. Click the **Print Uninvoiced...** link at the bottom of the Invoices grid.
- 3. Click the *Print* we button. The invoices for the account display on the page and are sent to your default printer.
- 4. Use the toolbar directly above the invoice to *navigate through the preview of invoices*.
 - Use the arrows to scroll through all invoices.
 - Use the **Zoom** box to increase or decrease the size of the invoice on the screen.
 - Use the **Find** box to type text you want to locate in the invoices.
 - In the **Export** box, select a format to export the invoice information.
 - Click the **Print** button in the invoice toolbar to reprint the selected invoice.

- Select the check box next to the account name to flag the invoice as printed or select the Select/Clear All check box to update all invoices. This will set the invoice as printed, and the account name will no longer display in the Print Invoices list until new charges are incurred.
- 6. Click the *Save* button after making your selections.
- 7. Click **OK** in the confirmation box to mark all selected invoices as printed.

To print all invoices not marked as invoiced

- 1. From the **accounting** menu, click **Invoice Accounts**. The Print Invoices page displays.
- Clear the check box next to any accounts listed that you do not want to invoice at this time.
 By default, all accounts not previously marked as printed will display in the list.
- Click the *Print* button.
 The invoices for the selected accounts display on the page and are sent to your default printer.
- 4. Use the toolbar directly above the invoice to *navigate through the preview of invoices*.
 - Use the arrows to scroll through all invoices.
 - Use the *Zoom* 100% box to increase or decrease the size of the invoice on the screen.
 - Use the **Find** box to type text you want to locate in the invoices.
 - In the **Export** box, select a format to export the invoice information.
 - Click the **Print** button in the invoice toolbar to reprint the selected invoice.
- Select the check box next to the account name to flag the invoice as printed or select the Select/Clear All check box to update all invoices. This will set the invoice as printed, and the account name will no longer display in the Print Invoices list until new charges are incurred.
- 6. Click the *Save* button after making your selections.
- 7. Click **OK** in the confirmation box to mark all selected invoices as printed.

Adding a Credit or Debit to an Account

If you need to prorate a customer's tuition for class or adjust the amount that they owe on an invoice, you can do so by adding a manual credit or debit transaction.

To add a manual credit or debit transaction to the tuition

- 1. Open the Edit Registration page for the registration.
 - Click the Registrations tab on the Edit Student page, and then click the Edit² button next to the registration you want to change.

- OR -

- Click the Active Registrations tab on the Edit Account page, and then click the Edit button next to the registration you want to change.
- Click the Transactions tab, and then click the *Edit* button next to the tuition transaction you want to adjust.
 NOTE: The Tuition transaction is the Debit (D) transaction that is the original tuition charge for the registration.
- 3. Click the **Transactions** tab, and then click the **Add new:** box to select **Credit** or **Debit**.
- 4. In the **Amount** box, type the amount of the credit or debit.
- 5. In the **Description** box, type a description for the credit or the debit.
- 6. Click the *Save and Return* button to save the changes and return to the previous page.

To add a manual credit or debit to the Invoice

- 1. Click on the Invoices tab on the Edit Account page.
- 2. Click the *Edit* button next to the invoice you want to change.
- 3. In the **Transactions** tab, click the *Edit* button next to the debit (D) transaction you want to adjust.
- 4. Click the **Transactions** tab, and then click the **Add new:** box to select **Credit** or **Debit**.
- 5. In the **Amount** box, type the amount of the credit or debit.
- 6. In the **Description** box, type a description for the credit or the debit.
- 7. Click the *Save and Return* button to save the changes and return to the previous page.

Adding Miscellaneous Fees

You can add one-time miscellaneous fees to a registration if you need to add a charge for textbooks, supplies, or any other item after registration has already been completed.

To add miscellaneous fees

- 1. In the Edit Account page, click the Invoices tab.
- 2. Click the *Edit* button next to the invoice to which you want to add fees. The Edit Invoice page displays.
- In the Add new fee box, select the <u>fee type</u> you want to add. The Add Transaction page displays.
- 4. In the **Amount** box, type the amount for the charge.
- 5. In the **Due Date** box, type the date the new charge is due.
- 6. In the **Description** box, type a brief description for the charge.
- 7. Click the *Save and Return* button to save the changes and return to the **Edit Invoice** page.

NOTE: To include miscellaneous fees during registration, you can add fees to the program within the <u>program setup</u>. This will ensure all students registering for the program will be charged the miscellaneous fees.

Purchasing a Membership

If you have <u>membership types</u> created in your database, you can assign memberships to accounts and contacts through the Memberships tab on the Edit Account page.

To purchase a membership

- 1. Click on the **Memberships** tab on the **Edit Account** page.
- 2. Click the **Purchase membership...** link.
- 3. In the **Purchase Membership** page, select the radio button next to the membership you want to purchase, and then click the *Save* button.
- 4. Click **OK** to confirm the purchase. The Edit Membership page displays.
- 5. The **Start Date** box will default to the current date. If needed, type the appropriate start date for the membership.
- 6. The End Date will default to the appropriate end date based on the
- 7. In the **Contacts** tab, select the appropriate contact(s) for which the membership should be applied.
- 8. **Note:** The number of contacts allowed for a particular membership is determined......
- 9. Click the **Comments** tab to add any comments about the membership purchase.
- 10. Click the *Save* button.
- 11. If applicable, navigate to the **Payments** tab on the **Edit Account** page to <u>post a payment</u> for the membership.

Refund Payments Tab

The Refund Payments tab on the Edit Account page provides a way to log and track refund payments that have been sent to customers.

In order to refund a customer's credit card you must first issue the refund directly through the payment gateway web page. Once the credit card has been refunded or you have issued the customer a refund check or other form of payment, you will then want to record the refund on the customer's account within Imperisoft.

To add a refund payment to an account

- 1. Click on the **Refund Payments** tab on the **Edit Account** page.
- 2. Click **Add new refund payment...** at the bottom of the grid. The Add Refund Payment page displays.
- 3. In the **Amount** box, type the dollar amount of the payment.
- 4. Click in the **Post Date** box to change the date the refund payment is to be posted.

The Post Date defaults to the current date.

- 5. In the **Reference Number** box, type a reference number if needed. This is an optional field but is useful for detailed record keeping.
- 6. In the **Memo** field, type any necessary notes.
- 7. Click the **Save** button to save the refund information.
- 8. Click **Apply Refund Payment** to open the **Apply Refund Payment** dialog box.

The Apply Refund Payment dialog box contains a grid that displays all of the current open credits for the account.

- 9. Select the check box in the **Pay** column for the credits you want to apply the refund payment to.
- 10. Click in the **Payment** box to change the amount being applied if needed.
- 11. Click **Save** when you have finished selecting outstanding credits.
- 12. Click **OK** to confirm the transaction and close the Apply Payment dialog box. The applied refund payment displays in the Transactions tab.

Editing an Account

The Edit Account page allows you to view general account information such as the account name as well as access the various contacts that might be assigned to an account, view active registrations, invoices, payments, refund payments and memberships.

To view or edit account information

Locate the account using the Account <u>Search</u>, and then click on the *Edit* button.

The Edit Account page displays.

- 2. Use the **About** section to view the **ID**, **Historical ID**, **Current Balance**, **Created** and **Modified** dates of the account.
- Click the Default Payment Terms check-box to set a payment term for the account. If no payment term is selected, the account will use the <u>default</u> <u>payment term</u> selected for the organization.
- 4. In the **General** section, use the **Active** check-box to indicate if the account is active or inactive.
- 5. Click the **Type** drop-down to change the Account Type.
- 6. Click in the Name box to edit the Account name.
- 7. Click the **Discount** drop-down to change or add an <u>Account Discount</u>.
- 8. Click the **Referred By** drop-down to change or add referral information for the account.
- Click in the URL box and type a valid Web address to include a company Web site for the account. The URL must be correctly formatted, for example:

http://www.imperisoft.com

- 10. If the **URL** box contains a Web address, click the *Account Web site* button to open the Web site in a new browser window.
- 11. Click the *Save* abutton on the toolbar to save any changes made to the account.
- 12. Use the following tabs at the bottom of the **Edit Account** page to add, edit, or view information related to the account: Comments, Contacts, Active Registrations, Notes, <u>Invoices</u>, <u>Payments</u>, <u>Refund Payments</u>, and Memberships

Program Management

Set up Semesters and Programs

To create a schedule of programs in Imperisoft you must first create a Semester in which to create the program(s). A Semester is a grouping of programs.

Click here to learn how to add or change semesters

Click here to learn about how to add programs to a semester

Note: The terminology for Semester can be changed to accommodate the needs of your organization. For example, you can use the term Season, Quarter, or Program Group to refer to a semester. See the help topic <u>Chooseing Terminology</u> for more information.

Adding/Editing a Semester

Semesters are groups of programs or classes. For example, one semester might be "Summer 08" to indicate that those programs take place in the Summer of 2008. To create a course in Imperisoft you must first create a Semester in which to create the course.

To add a semester

- 1. On the **courses** menu, click **Semesters**.
- 2. In the Semester Search page, click GO.
- 3. Below the **Search Results** grid, click **Add new semester...**. The Add Semester page displays.
- 4. In the Type box, select Ongoing or Standard.
 - Ongoing programs are programs that do not have an end date. All programs created within an Ongoing semester are recurring programs.
 - Standard programs are one day or multiple day programs that have end dates.
- 5. In the **Description** box, type the name of the new semester.
- 6. In the **Start Date** box, type a beginning date for programs that will be created within the group.
- 7. In the **End Date** box, type an ending date for programs that will be created within this group.

This box is disabled if the Type is Ongoing.

- 8. Click the **Registration** tab and complete the information.
- 9. In the **Registration Fee** box, type an amount to charge for registration of programs that are part of this semester.
- 10. In the **Cancellation Fee** box, type an amount to charge for cancellation of programs that are part of this semester.
- 11. In the **Online Registration Caps At** box, type a percentage. Online registration will no longer be available once registration for programs part of this semester has reached this percentage.
- 12. In the **Online Registration Open Time** box, select a time of day. Online registration will become available at the selected time on the Registration Open Date.

Note: This time is MST.

- 13. Click the *Save* button to save the semester.
- 14. Click the **Programs** tab to create new programs and add them to this group.
- 15. Click the **Bundles** tab to create a bundle of programs.

To edit a semester

- 1. On the **courses** menu, click **Semesters**.
- 2. Use the <u>search</u> feature to locate the semester you want to edit, and then click the *Edit* button next to the group.
- 3. Click the Print Confirmation Letters link at the top of the page to print letters of confirmation for students registered for programs within this group.

- 4. Click the Print Drop/Transfer Notices link at the top of the page to print drop/transfer notice letters for students who have dropped from or transferred from programs within this group.
- 5. Click in the **Description** box to edit the title of the semester.
- 6. Click in the **Start Date** and **End Date** boxes to change the start and end dates for the group.
- 7. Use the **Registration** tab to change the registration fee, cancellation fee, online registration cap, or online registration open time.
- 8. Click the **Programs** tab to create new programs and add them to this group.
 - Click the *Copy* button to the right of a program to <u>copy the</u> <u>program</u>.
- 9. Click the **Bundles** tab to create a bundle of programs.

Adding/Editing a Program

To add a program, you must first locate the appropriate semester or program group under which the program will be listed. If the semester is not yet created, you must first <u>create the semester</u> before you can create a program.

To add a program

- 1. On the **courses** menu, click **Semesters**.
- 2. Use the Semester Search to locate the group in which you want to create the program.
- 3. Click the **Select** button next to the appropriate semester. The Edit Program Group page displays.
- 4. Click the **Programs** tab, and then click **Add new program...**. The Add Program page displays.
- 5. In the **Type** box, select a program type.

NOTE: If you are creating a program in an Ongoing type semester, the program type will be Recurring. Recurring programs have no end date.

6. In the **Short Description** box, type a short but descriptive name for the program.

This description displays in various locations within the Imperisoft application. It does not display to customers during online registration.

- In the **Description** box, type a more detailed description of the program. This description displays in various locations within the Imperisoft application. It does not display to customers during online registration.
- 8. Select the **Membership Required?** check box to indicate that a contact must be <u>assigned a membership</u> within your organization in order to register for the program.
- 9. Click the **Scheduling** tab and complete the following:
 - a. In the **Registration Open Date** box, type the date students can begin registering for this program.
 If this box is left empty, registration can begin as soon as the program is saved.
 - b. In the **Start Date** box, type the date the program begins.
 - c. In the End Date box, type the date the program ends.
 - d. In the **#Weeks** box, type the number of weeks the program is to be scheduled to run.
 - e. In the **Start Time** box, type the time of day the program is scheduled to start each day.
 - f. In the **End Time** box, type the time of day the program is schedule to end each day.
 - g. In the **Meets On** section, select the check box next to each day of the week the program is scheduled to meet.
- 10. Click the **Tuition** tab to add the tuition for the program.
- 11. Click the Additional Fees tab to add any additional fees for the program.
- 12. Click the <u>Misc tab</u> to include the number of seats in the program, course number, credit hours, and the location and room in which the program will be conducted.

- 13. Click the *Save* 🖥 button to save the program.
- 14. Once the new program is saved, use the remaining tabs on the Edit Program page to further define important program information.

To edit a program

1. Open the Edit program page.

Do one of the following to open the Edit Program page:

- 1. On the courses menu, click Semesters.
- Use the Semester Search to locate the group that contains the program you want to edit, and then click the Edit button next to
 - program you want to edit, and then click the Edit dutton next to the semester. The Edit Semester page displays.
- Click the **Programs** tab, and then click the **Edit** button next to the program you want to edit. The Edit Program page displays.

OR

- 4. On the courses menu, click Programs.
- Use the Program Search to locate the program, and then click the Edit² button next to the program you want to edit.
- 2. Click the **Attendance** link at the top of the page to view attendance or <u>take</u> <u>attendance</u>.

NOTE: The Attendance link also allows you to view attendance for a completed program.

- 3. Click the **Cancel Program** link to cancel a standard program that is scheduled or underway.
 - A credit for the tuition and associated registration fees is automatically added to the account for any student registered for the program.
 - If you cancel a program that is part of a <u>bundle</u>, the bundle will no longer be available for registration. You will need to recreate the bundle to allow for additional registrations.
 - When you cancel a program, you cannot "undo" or reverse the cancellation.
- 4. Click the <u>Copy Program</u> link to create another program like the selected program.
- 5. Click in the **Type** box to change the program type.

NOTE: If the program is a Recurring type program you will not be able to change the type.

- 6. Click in the **Short Description** box to change the short program description.
- 7. Click in the **Description** box to change the longer program description.
- 8. Select the **Membership Required?** check box to indicate that a contact must be <u>assigned a membership</u> within your organization in order to register for the program.
- 9. Click the <u>Scheduling tab</u> to change the program date or time.
- 10. Click the **Tuition** tab to make any changes to the tuition.
- 11. Click the <u>Additional Fees tab</u> to add or change any additional fees for the program.
- 12. Click the <u>Misc tab</u> to include the number of seats in the program, course number, credit hours, and the location and room in which the program will be conducted.
- 13. Use the remaining tabs on the Edit Program page to further define important program information.
- 14. Click the *Save* 🖥 button to save the program.

To reopen a program

• Click the **Reopen Program** link at the top of the Edit Program page. You may want to reopen a program to make changes to the program, add any late registrations or update a students registration with a Mark.

Important: After you have reopened a completed program and made the necessary changes, it is important to go back and enter the original completed date and then click the *Save* button.

Tuition Tab

The Tuition tab on the Edit Program page allows you to set tuition and deposit amounts for the program.

To set program tuition

- 1. Click the **Tuition** tab on the Edit Program page.
- 2. In the **Tuition Amount** box, type the amount of the tuition to charge for the program.
- 3. In the **Deposit Amount** box, type an amount if you want a portion of the tuition to be designated as a deposit.
- 4. Click the *Save* 🖥 button when you have finished adding tuition.

The Membership Specific Overrides grid displays the tuition amount for each <u>membership type</u> in your system, and allows you to set overrides for each.

NOTE: The amount displayed in the Default Membership Tuition column is the amount a customer will pay who has purchased that membership type.

To set membership overrides

- 1. Click in the **Override Membership Tuition** box for the membership, and then type the amount all customers with that membership type should pay for this program.
- 2. Repeat for any memberships you wish to override, and then click the *Save* button.
- 3. To override all memberships and set a tuition amount that should apply to all customers with any membership, type an amount in the **Membership Global Override Amount** box.
- 4. Click the *Save* button when you have finished setting membership overrides.

Programs Misc Tab

The Misc tab on the Edit Program page allows you to include the number of seats in the program, the program location and room, and include a course number and credit hours.

To add miscellaneous program information

1. In the **#Seats** box, type the total number of available seats for the program.

NOTE: The maximum number of seats is 999.

- 2. In the **Location** box, select the organizational Unit in which this program should be available.
- 3. In the **Room** box, select the room in which the program will be conducted.
- 4. In the **Course Number** box, type a course number for the program.
- 5. In the **Credit Hours** box, type the number of credit hours for the program.

Additional Fees Tab

The Additional Fees tab on the Edit Program page allows you to add additional fees to the tuition for the program. When fees are added to a program here, the fees are charged to all students who register for the program. For information on how to add fees to an individual student, see the topic <u>Adding/Editing an Invoice</u>.

To add additional program fees

1. Click the **Additional Fees** tab on the Edit Program page, and then click **Add** additional fee....

The Add Program Fee page displays.

- 2. In the **Type** box, select a program fee type.
- 3. In the **Description** box, type a description for the fee.
- 4. In the Amount box, type the amount you want to charge.
- 5. Select the **Recurring** check-box if the program is recurring and you want additional fee to charge monthly with the monthly tuition charge. The check-box should remain clear if you want the additional fee to charge only with the first months tuitions charge.
- 6. Select the **Show to Student as Included in Tuition?** box to make the additional fee display as part of tuition in invoices, account statements, confirmation letters, and online registration.
- 7. Click the **Comments** tab, and then type any additional information in the **Comments** box.
- 8. Click the *Save* button to save the additional fees.

Online Registration Tab

The Online Registration tabs on the Edit Program and the Edit Bundle pages allow you to make a program or program bundle available for online registration.

To use the Program Online Registration tab

- 1. Select the **Available Online** check-box to make the program available for online registration.
- 2. In the **Minimum Due at Registration** box, type a payment or deposit amount required during the online registration process.
- 3. In the **Online Registration Open Time** box, type the time of day that online registration will become available on the date registration opens for the program.

NOTE: This time is MST.

- In the **Title** box, type the name of the program. This is the program title that appears to potential students or participants during online registration.
- 5. In the Level box, type a program level, for example, Beginner or Advanced.
- 6. In the **Online Description** box, type the full description as you would like it to appear online.
- 7. In the **Special Notes** box, type any additional program information for potential students.
- 8. In the **Supply List** box, type a list of supplies provided or required for the program.

This information is listed on the program description page for potential students.

To use the Bundle Online Registration tab

- 1. Select the **Available Online** check-box to make the program available for online registration.
- 2. In the **Minimum Due at Registration** box, type a payment or deposit amount required during the online registration process.
- 3. In the **Registration Open Date** box, type the date registration will open for the program bundle.
- 4. In the **Registration Open Time** box, type the time of day that online registration will become available on the registration open date.
- In the **Title** box, type the name of the program.
 This is the program title that appears to potential students or participants during online registration.
- 6. In the Level box, select a program level, for example, Beginner or Advanced.
- 7. In the **Description** box, type the full description as you would like it to appear online.

- 8. In the **Special Notes** box, type any additional program information for
- potential students.9. In the Supply List box, type a list of supplies provided or required for the program.

This information is listed on the program description page for potential students.

Program Media Tab

The Media tab on the Edit Program page displays a list of all media types to assigned to the program. Media is the type of instruction or subject curriculum being taught. For example, for an art school it may be oil painting but for a dance studio, it might be ballet or ballroom.

NOTE: Media types can be defined by your organization through the <u>Media</u> <u>Types</u> lookup.

To assign media types to a program

- 1. On the Program Media tab, click Manage Program Media.....
- 2. Select the check-box next to all media types to be associated with the program.
- 3. Click the *Save and Return* button to return to the Program Media tab.

To remove media types from a program

- 1. On the Program Media tab, click Manage Program Media....
- 2. Clear the check-box next to any media types you want to remove from the program.
- 3. Click the *Save and Return* button to return to the Program Media tab.

Instructors Tab

The Instructors tab on the Edit Program page add instructors who will teach the course.

To add an instructor to the program

- 1. In the **Instructors** tab, click **Add instructor(s)**.... The Program Instructor Search page displays.
- 2. Using the <u>Search functionality</u>, locate the instructor that is teaching the course.
- In the Search Results grid, select the check-box to the left of the instructor, and then click the Save button. The Edit Program page displays.
- 4. In the **Instructors** tab, click the *Edit* button next to the instructor to add contract information for the instructor.

To remove an instructor from a program

- 1. In the **Instructors** tab, click the *Remove* \times button next to the instructor.
- 2. Click **Yes** in the confirmation box to remove the instructor.

Copying a Program

To copy a program

- 1. Do one of the following:
 - In the Edit Semester page, click the *Copy* button to the right of the program you want to copy
 - In the Edit Program page, click the **Copy Program** link.
- 2. Select the appropriate semester from the **Semester** box.
 - The semester of the source program will be selected by default.
 - You cannot copy a program into a closed semester.
- 3. Type the **Start Date** and **End Date** for the new class or click the arrow to select a date from the calendar.
- In the Registration Open Date box, type the date students can begin registering for this program.
 If this box is left empty, registration can begin as soon as the program is saved.
- 5. Select the check-box next to **Membership Overrides**, **Additional Fees**, **Instructors**, or **Media** to copy those additional items from the source program to the new program.
- 6. Click the *Save* button to save the program, and then click **OK** in the confirmation box.
- 7. Review the information in the Edit Program page to ensure any other changes need to be made such as Meet Days or Start and End times.
- 8. Once all necessary changes have been made, click the *Save* button to save the changes.

Creating a Program Bundle

Program Bundles allow you to group two or more programs together to be sold as one program or program package.

Note: Depending on the <u>terminology</u> your organization has chosen to use, bundles might be titled *Packages*, or another term used for a set of programs grouped together to be sold as one. For the purpose of this documentation, they will be referred to as the *Bundles*.

To create a bundle

- 1. On the programs menu, click Program Groups.
- 2. Use the **Program Group** <u>Search</u> to locate the group which contains the programs you want to bundle.

NOTE: Programs must be within the same semester.

- 3. Click the **Select** button next to the appropriate semester. The Edit Program Group page displays.
- 4. Click the **Bundles** tab, and then click **Add new bundle...**. The Add Bundle page displays.
- 5. In the <u>Type</u> box, select a bundle type.
- 6. In the Name box, type a name for the bundle.
- 7. To set the **Calculation Type** and price for the bundle, do one of the following:
 - Select the **Dollar** radio button, and then in the **Price** box type the total price for the bundle of programs.
 - Select the **Percentage** radio button, and then in the **Amount** box type the percentage of the combined program prices to charge for the bundle. For example, type 80% to set the bundle price at 80% of the total cost of the programs.
- 8. In the **Expiration Date** box, type the date the bundle price should expire.

NOTE: If left blank, the bundle price will remain available until the programs are full.

- 9. Click the *Save* button to save the bundle.
- 10. In the Programs tab, click Add programs... .
- 11. Use the **Bundle Program** <u>Search</u> to locate the programs you want to bundle.
- 12. Select the check-box next to each program to be included in the bundle, and then click the *Save* button.
- 13. View the **Info** section to determine if the bundle price displays as you intended:
 - If **Dollar** was selected in step 7, the percentage off of the total program prices will display next to the **Price** box.

- If **Percentage** was selected in step 7, the discounted Price will display next to the **Amount** box.
- 14. Use the <u>Online Registration</u> tab to make the program bundle available for online registration.
- 15. Use the Online Photo tab to add a photo to display for online registration.
- 16. Click the Save button when you are finished creating the program bundle.
- You can use the **Registrations** tab to view a list of students who have registered for the program bundle.

Attendance

The <u>Daily Roster</u> feature allows you to track attendance for a program and view attendance for past dates.

To track attendance

- 1. Click Daily Roster in the menu bar.
- 2. In the calendar, click on a day to select the date for which you want to track attendance.
- 3. Locate the program, and then in the **Action** box, select **Go To Attendance**.

NOTE: To view attendance for a competed program, you must locate the <u>Edit</u> <u>Program</u> page.

- 2. Select **Present** next to each student who is in attendance.
- 3. Select **Absent (Excused)** next to each student who is not in attendance but has been excused.
- 4. Select **Absent (Unexcused)** next to each student who is not in attendance but has not been excused.
- 5. Click the *Save* button when finished.
- 6. When you are certain the attendance is complete, click **Complete Attendance**.

NOTE: Once you have clicked Complete Attendance, no changes can be made to the roster for that day.

7. Click **OK** in the confirmation box.

Daily Roster

The Daily Roster page allows you to view at a glance, information about all the programs scheduled on a specific day and <u>track attendance</u>.

To use the daily roster page

- Click daily roster on the menu bar. A list of each program scheduled for the current day appears, along with the following information:
 - Time Scheduled program time
 - Program Program title
 - Seats Total number of seats in the program
 - Reg Number of currently registered students
 - Abs Number of students marked absent in the attendance page
 - Int Number of students who are taking this program as an introductory program
 - Mkup Number of students who are taking this program as a makeup program
 - Action Select an item from this box to use the Attendance and Schedule Intro options
- Click the magnifying glass to the left of the program listing to view a list of the students registered for the program. The following information displays for each student listed:

The following information displays for each student listed:

- Student The name of the student. Click the link to view the Edit Student page.
- Age The age of the student.
- Account The account with which the student contact is associated. Click the link to view the Edit Account page.
- Description The registration status.
- Attendance Status Once attendance is taken for the selected day, this column displays the attendance for the selected day.
- 1st Program? This column refers to the *1st day of program status* for the student and applies to recurring type programs only.

II = Student is taking the program as an Introductory program.

S = This is the student's first day of program.

R = This student has taken this program before and is restarting the program.

- Balance The registration balance due for the student.
- 3. Select **Go to Attendance** from the Action list box to log <u>attendance</u> for a program.
- Select Schedule Intro from the Action list box to schedule a free introductory program session for a student.
 Note: Introductory programs are only available for Recurring programs.
- 5. Click a date in the calendar to choose a different day.

Reporting

Reports

The Reports section allows you view and print reports on information you need to make efficient and effective business decisions. The options available in each report are different. For demonstration purposes, we will take a look at the Daily Roster report.

To access the Daily Roster report

- 1. Click **reports** in the menu bar. The Reports home page displays.
- 2. Click the arrow next to the **Programs** section to expand the list of available reports.
- 3. Click Daily Roster.
- 4. Click the **Attendance Date** *calendar button* and select a date from the calendar.
- 5. Click the arrow next to **Program** and select a program. To view all programs, select (Select All).
- 6. Click **View Report**. The Daily Roster report displays.

To navigate through a report

- Click the Next Page ▶ button to move to the next page of the report.
- Click the Last Page button to move to the last page of the report.
- Click the *Previous Page* button to move to the previous page of the report.
- Click the *First Page* dutton to move to the first page of the report.
- Click the *Zoom* **button** to increase or decrease the size of the report on the screen.
- To find specific information in the report, click in the **Find** box, type text you want to locate, and then click **Find**.
- To export information from the report, click in the **Export** box, select a format, and then click **Export**.
- Click the *Refresh* button to refresh the information displaying on the report.
- Click the *Print* button to print the report.

Customizing Reports

Most Imperisoft reports have several parameter options that you can choose from and any report can be exported into Microsoft Excel. Once in Excel, you can manipulate the columns and rows, total columns and add other data to create a custom version of a report.

You can also utilize the <u>Search</u> functionality to create custom Excel reports. Because Search is available for Account, Contact, Registration, Program, and Transaction data, and because search results can be exported into Excel, the Search functionality becomes a custom reporting feature.

As an example, lets say you need a roster report to give to your instructors so that they can take attendance each day, but none of the available roster reports in the <u>Reports</u> module have the information that you need. To remedy this, you can use the Currently Registered Students search to create an Excel roster report. By adding filters and changing the Result Fields within a search, you can create your own custom roster report.

Click here to see an example of the filters and result fields you might use for a roster report.

To create a custom roster report

- 1. Select **Currently Registered Students** from the **courses** menu.
- 2. Click Add Filter and select the Program Description field.
- 3. Select = as the **Operator** and then type the name of the program in the **Value** field.
- 4. Expand the **Result Fields** section, and select the information you would like to appear on the roster report. For example:

Instructor First Name Instructor Last Name Student First Name Student Last Name Student E-mail Student Home Phone

- 5. Once you have selected the data you would like to see on the report, click **GO**.
- 6. Click **Export to Excel** to build your Excel report.

You can also utilize the ability to save searches so the settings can be saved for different versions of a roster report.

If you are unable to find the information you need in either the <u>Reports</u> module or within any of the available <u>searches</u> in Imperisoft, custom reports can be created by our development team for a fee. Contact our Support department to inquire about customizations at <u>Support@Imperisoft.com</u>.

Using Search

The Imperisoft Search functionality allows you to locate accounts, contacts, and various contact related information such as credit cards, notes, follow-ups and addresses, as well as program related data such as semesters, programs and registrations. You can also use Search to export a list of results to Microsoft Excel or to <u>e-mail a group</u> of contacts.

It is very important that you fully understand how to use the Search functionality in Imperisoft. In most cases you must go through the Search page for an item in order to create a new item.

To use search

- Click **accounts** on the menu bar to open the Account Search page.
- Select **All Contacts** from the **contacts** menu to open the Search for All Contacts page or select any one of the contact category searches.
- Select Notes, Follow-Ups, Addresses, or Credit Cards from the contacts menu to search for related information.
- Select **Memberships** from the **accounts** menu to open the Memberships Search page, or select **Members** from the **contacts** menu to open the Member Search page.
- Select **Semesters** from the **courses** menu to open the Semester Search page.
- Select **Programs** from the **courses** menu to open the Program Search page.
- Select **Bundles** from the **courses** menu to open the Bundle Search page.
- Select **Currently Registered Students** or **All Registrations** from the **courses** menu to search for registrations.
- Select Search for Invoices, Search for Payments or Search for Transactions from the accounting menu to perform payment and transaction related searches.

Every search page is set up with the same basic components: Saved Searches, <u>Filters</u>, <u>Result Fields</u>, <u>Sorting</u> and <u>Search Results</u>.

The Saved Searches section allows you to save the Filter, Result Fields and Sorting options set for a particular search and save those settings for future use. Click here for more information about how to Save a search.

Search Filters allow you to specify who or what you would like to search for.

To apply Search Filters to your search

- 1. Click the *chevron icon* to expand the filters grid.
- 2. Click Add Filter.
- 3. Select a field on which to search from the **Field** box.
- 4. Select an appropriate operator from the **Operator** list.
- 5. Click in the **Value** box, type a value.
- 6. Repeat steps 2 6 to add additional filters to the search.
- 7. Click **Go** to execute the search.

The Result Fields allow you to choose how your search results are displayed before you perform a search.

To choose what displays in the Search Result

- Click the chevron icon to display the **Result Field** check boxes. By default, all fields are selected to display in the search results.
- 2. Clear the check box next to any fields you wish to remove from the list, and select the check box next to any fields you want to add to the search results.
- Click Select/Clear All to select all the boxes at once or to clear all the boxes at once.
- 4. Click **Go** to execute the search.

The Sorting feature allows you to determine *how the results of a search are sorted* when they are displayed.

For example, when searching for accounts from the Account Search page, the records by default are sorted by account ID. You might however decide that you would prefer to sort them alphabetically by Account Name.

Each standardized search allows for up to three sort filters to be applied. The second and third sort filters will *sort sets of results within your results* where there are multiple recurrences of the same name or identification tag.

For example, if in the results of your search the system returns 25 instances of the name Jane Smith, you can opt to have those 25 records placed in a certain order as well. By specifying a second sort filter such as "r; ID," those 25 instances of Jane Smith records will be listed in numerical order by ID numbers.

To use Sorting

- 1. Click the chevron icon to display the **Sorting** boxes.
- 2. Click in the first drop-down menu and select which section you would like to see sorted.
- 3. Click the **Ascending** radio button to sort the results in ascending order, or choose the **Descending** radio button to sort the results in descending order.
- 4. Click **Go** to execute the search.

The Search Results displays the results of your search.

To use the Search Results

- Click in the Show records per page drop-down box and select the number of records you want to display on each page of your results. Page numbers will appear in the blue footer at the bottom right-hand corner of the results grid. Click on a number to view the results page by page.
- Click Go to activate the search.
 Once your result list displays, you can choose from any of the following actions:
 - Click **Export to Excel** to export the results of your search to a Microsoft Excel spreadsheet.
 - Click <u>E-mail this Group</u> to send an e-mail to each of the records in the result list.
 - To edit a record do one of the following:

Click the *Edit* button at the right of the record you want to edit.

Click the **Select** button at the right of the contact you want to edit.

• Click the **Add New** link at the bottom of the page to create a new record.

The Add New link options will vary, depending on the context of the search and the access rights you have been granted.

- Use the **Showing** numbers in the lower left corner of the page to see the total number of records returned by the search.
- Use the **Go to page** numbers in the lower right corner of the page to jump to another page of results.
- Click the **ellipsis** (three periods) in the lower right corner to jump to the next group of ten pages.

Administration and Setup

Setting up Your Database

If you are setting up your Imperisoft database for the first time or are new to the application and need to understand how it is set up, click the links below and we will guide you through all the steps you need to take.

- <u>Verify Company Information</u>
- Set Lookup Values
- Set up Semesters and Courses
- Add Accounts and Contacts
- Adding Users and Setting Permissions
- <u>Choosing Terminology</u>
- <u>Configuring Online Registration</u>

Verify Your Company Information

Basic information about your company, such as your company name is stored in the Edit Unit page. A "Unit" in Imperisoft is an operating unit of your organization.

Verify your basic company information is correct in the Edit Unit page

- 1. In the administration menu, click Manage YourCompanyName Unit.
- 2. Click in the **Primary Phone** or **Secondary Phone** box to change a phone number for the unit.
- 3. Click in the **Default Payment Terms** box to change the default payment terms for invoices generated for accounts. If left blank, the system default payment term is Net 30.
- 4. Select the **Show CC Options on Invoice?** check-box to display active credit card types as optional payment methods on invoices.
- 5. Click in the Name box to edit name of the unit.
- 6. Use the Address Line One, Address Line Two, City, State, and Postal Code boxes, to change the address of the unit.
- 7. Click the Save button to save the changes.

Managing Contact Categories

The Contact Categories page allows you to view, edit and add Contact Categories.

To add custom Contact Categories

- 1. From the **administration** menu, click **Manage Contact Categories**. The Contact Categories page displays.
- Click Add new category.... The Add Contact Category page displays.
- 3. Type the name of the new category in the **Description** box.
- Select the Show On Menu? check box to display the new category in the Contacts toolbar menu. This allows you to use the Search feature to locate contacts that are assigned to the category. Type a number in the Menu Sort Order box to indicate where in the Contacts toolbar menu the new category should display.

NOTE: If more than one category is assigned the same sort order, those categories will are listed in alphabetical order.

5. Click the *Save and Return* button to return to the **Contact Categories** page.

To edit a Contact Category

- 1. From the **administration** menu, click **Manage Contact Categories**. The Contact Categories page displays.
- 2. Click the *Edit* button next to the category you want to change. The Edit Contact Category page displays.
- 3. Click in the **Description** box to change the name of the category.
- 4. Select or clear the **Show On Menu?** check box to display or remove the category from the **Contacts** toolbar menu.
- 5. Click in the **Menu Sort Order** box to change the sort order of the category.
- 6. Click the *Save and Return* button to return to the **Contact Categories** page.

To delete a Contact Category

- 1. From the **administration** menu, click **Manage Contact Categories**. The Contact Categories page displays.
- 2. Click the *Edit* button next to the category you want to change. The Edit Contact Category page displays.
- 3. Click the *Delete* \times button from the toolbar.

NOTE: The Delete button will be disabled if any contacts are assigned to the category.

4. Click **OK** in the confirmation box to delete the category, or click **Cancel** to cancel the deletion.

Set Lookup Values

As you enter your contact and program data you will find drop-down lists throughout the application that allow you to select attributes. For example, when creating a new Account, you are prompted to select an Account Type from the drop-down list. These drop-down lists can be edited within the Lookups section of the administration menu. You should go through each lookup to create the appropriate items for your organization.

- In the **administration** menu, select **Lookups** and then select the category and lookup type.
- To add a new item, click **Add new item...** at the bottom of the list.
- When first setting up your database, you can delete or rename an existing lookup item to something more fitting for your organization.

NOTE: If a lookup item is marked as System Defined, it cannot be changed or deleted. If a lookup item has been selected for a record in the system it cannot be deleted. It can be renamed, but this will rename the item for all historical records as well.

Each lookup type should be reviewed to determine if changes or additions need to be made however the following list of lookup types are most critical in preparing your database for the entry of customer and program information. Click the link for the type below to see more information on that Lookup Type.

- <u>Account Types</u>
- <u>Account Contact Types</u>
- <u>Credit Card Types</u>
- Media Types
- Locations

Click here to access information for all Lookup Types in Imperisoft.

Lookups Menu

Lookups

Within Imperisoft there are drop-down lists that are pre-populated with system generated values and user-defined values. The lookups section of the administration menu allows you to set up and maintain the values for the lookup types below.

Memberships

- Membership Cancellation Reasons
- <u>Membership Types</u>

Programs

- Bundle Types
- Mark Types
- Program Fee Types
- Program Types
- Instructor Types
- Intro Program Status Types
- Level Types
- Media Types
- Payment Method Types

Accounts

- Account Contact Types
- <u>Account Types</u>
- Payment Term Types
- <u>Referral Types</u>

Contacts

- Address Types
- <u>Child Release Option Types</u>
- Credit Card Types
- Donation Types
- Follow Up Cancel Reason Types
- Follow Up Types
- Grade Types
- <u>Kindergarten Session Types</u>
- <u>Note Types</u>

- <u>School Types</u>
- <u>Student Status Types</u>

Discounts

- <u>Account Discount Types</u>
- <u>Coupon Codes</u>

General

- File Types
- Image Types

Locations

- <u>Cities</u>
- <u>Countries</u>
- Location Types
- Room Types
- <u>States</u>

Memberships

Membership Cancellation Reasons

When a membership is cancelled, a Cancellation Reason box displays, allowing you to include a reason for the cancellation.

To add or edit a Membership Cancellation Reason

- On the administration menu, select lookups, select Memberships, and then click Membership Cancellation Reasons.
 - The Membership Cancellation Reasons page displays.
- 2. Do one of the following:
 - Click the *Edit* button next to the membership cancellation reason you want to change
 - Click Add new item....
- 3. In the **Description** box, type the reason.
- 4. Click the *Save and Return* button to save the membership cancellation reason and return to the list.

Membership Types

Membership Types allow you to associate memberships to accounts and contacts. Through memberships, you can provide membership discounts to contacts as well as specify certain programs or programs as exclusive to members.

To add or edit a Membership Type

- 1. On the **administration** menu, select **Lookups**, select **Memberships**, and then click **Membership Types**.
 - The Membership Types page displays.
- 2. Do one of the following:
 - Click the *Edit* button next to the membership type you want to change
 - Click Add new membership type....
- 3. Select the **Exclusive** check-box to indicate the membership cannot be active for a contact in conjunction with other active memberships.
- 4. If applicable, in the **Account Code** box, type the general ledger account number from your company's accounting system.
- 5. In the **Sort Order** box, type a number to indicate where in the list of memberships that display in the <u>Purchase Membership</u> page the new membership should display.

NOTE: If no sort order is assigned, memberships will sort alphabetically.

- 6. Type the amount the membership costs in the **Membership Fee** box. If left blank, the membership is free.
- 7. In the **Maximum # Contacts** box, type the number of contacts in an account to which a membership can be applied.
- 8. Type the name of the membership in the **Description** box.
- 9. Select an option from the *Membership Duration* box to set the length of time a membership is active.
 - Annual Fixed Term (Calendar Year)
 - Fixed Dates If selected, you must type a Start Date and End Date for the term.
 - Fixed Duration If selected, you must type an Interval # and select a Type.
 - Lifetime

10. Select an option from the *Discount Type* box.

- **None** No membership discount is applied.
- **Dollar** When selected, you must type the dollar amount that should be discounted for registrations.

- **Percentage** When selected, you must type the percentage amount that should be discounted for registrations.
- 11. Click in the **Renewal Option** box to choose the appropriate renewal option for the membership.
- 12. Click the *Online Registration* tab to make the membership available for purchase online.
 - 1. Select the **Available Online** check-box.
 - 2. Type the title of the membership in the **Title** box.
 - 3. Type a description of the membership in the **Description** box.
- 13. Click the **Eligibility** tab and select the **Account Types** and **Account Contact Types** that are eligible to purchase this membership.
- 14. Click the *Save and Return* button to save the membership type and return to the Membership Types list.

To delete a Member Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Membership Types**.
- 2. Click the *Edit* button next to the membership type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a membership type if it is assigned to a member.

Programs

Program Bundle Types

Bundle Types are used when creating a new program bundle.

To add or edit a Program Bundle Type

1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Bundle Types**.

The Bundle Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 - Click the *Edit* button next to the bundle type you want to change.
- 3. Select the **Active** check-box to make the type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the pbundle type.
- 5. Click the *Save and Return* button to save the changes and return to the Bundle Types list.

To delete a Program Bundle Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Bundle Types**.
- 2. Click the *Edit* button next to the item you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a program bundle type if it is assigned to a bundle.

Mark Types

Mark Types are used to assign a mark, grade or score to a student's completed registration. Marks are assigned on the <u>Edit Registration</u> page. The term "Mark" can be changed to something such as "Grade" in the <u>Terminology</u> tab of the Edit Organization page.

To add or edit a Mark Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Mark Types**.
 - The Mark Types page displays.
- 2. Do one of the following:
 - To add a new type, click Add new item....
 - To edit a type, click the *Edit* button next to the type you want to change.
- 3. Select the **Active** check-box to make the type available, or clear the checkbox to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the mark type. For example, A, B, C.
- 5. Click the *Save and Return* button to save the information and return to the School Types list.

To delete a Mark Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Mark Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a mark type if it has been used.

Program Types

Program Types are used when <u>adding programs</u> to the system. Program Types help to categorize programs.

To add or edit Program Types

1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Program Types**.

The Program Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the program type. For example, Workshop.
- 5. In the **Transfer Fee** box, type the amount to charge as a transfer fee for programs of this type.
- 6. In the **Account Code** box, type the general ledger account number from your company's accounting system.
- 7. Click the **Confirmation Letter** tab to type the text you want to appear for confirmation letters for programs of this program type.
- 8. Click the **Waitlist Notification** tab type the text you want to appear for wait list notifications for programs of this program type.
- 9. Click the *Save and Return* button to save the new fee type and return to the Program Types list.

To delete a Program Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Program Types**.
- 2. Click the *Edit* button next to the fee type you want to delete.
- 3. Click the *Delete* \times button at the top of the page.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a type if it is currently assigned to a program.

Program Fee Types

Program Fee Types are used when <u>adding additional program fees</u> to programs. For example, charges for textbooks, modeling fees, or other additional supplies.

To add or edit Program Fee Types

1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Program Fee Types**.

The Program Fee Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the fee type. For example, Supplies.
- 5. In the **Account Code** box, type the general ledger account number from your company's accounting system.
- 6. Click the *Save and Return* button to save the new fee type and return to the Program Fee Types list.

To delete a Program Fee Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Program Fee Types**.
- 2. Click the *Edit* button next to the fee type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a fee type if it is currently assigned as a program fee for a program.

Instructor Types

Instructor Types are used when adding a new instructor to the system. For example, Contractor, General, or Staff.

To add Instructor Types

1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Instructor Types**.

The Instructor Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the instructor type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the instructor type.
- 5. Click the *Save and Return* button to save the new instructor type and return to the Instructor Types list.

To delete an Instructor Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Instructor Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete an instructor type if it is currently assigned to an instructor.

Intro Program Status Types

Intro Program Status Types are used when a student has participated in a free introductory program. This Status Type can be used to indicate whether or not the student registered as a result of the demo or what the end result of it was, for example, Registered, Did not like program, Too expensive.

To add Intro Program Status Types

- On the administration menu, select Lookups, select Programs, and then click Intro Program Status Types. The Intro Program Status Types page displays.
- 2. Click **Add new item...** to open the **Add Item** page.
- 3. Ensure the **Active** check box is selected if you want the new status type to be available to users or clear the **Active** check box if you want to hide the status from users temporarily.
- 4. In the **Description** box, type the name of the status type. For example: Registered, Too Expensive, or Too Advanced.
- 5. Click the *Save and Return* button to return to the **Intro Program Status Types** page.

Level Types

Level Types are used to set the program level when using the Online Registration tab for a <u>program bundle</u>.

To add or edit a Level Type

1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Level Types**.

The Level Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 - Click the *Edit* button next to the level type you want to change.
- 3. Select the **Active** check-box to make the level type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the level type.
- 5. Click the *Save and Return* button to save the changes and return to the Level Types list.

To delete a Level Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Level Types**.
- 2. Click the *Edit* button next to the level type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a level type if it is currently assigned to a record.

Media Types

Media Types are assigned to programs and to instructors. Media Types are the subject matter of the program. For example: Painting, Ballet, Accounting. The term "Media" can be renamed to "Subject" or something that might fit better for your organization through the <u>Terminology</u> tab in the Edit Organization page. If this term has been changed within your organization, the Lookups menu item will be renamed as well.

To add or edit Media Types

1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Media Types**.

The Media Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the media type. For example: Charcoal.
- 5. Click the *Save and Return* button to save the new type and return to the Media Types list.

To delete a Media Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Media Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a media type if it is currently assigned to an active program or instructor.

Payment Method Types

Payment Types are used when adding a payment to an account. For example: Credit Card, Cash, Coupon, Discount, Scholarship, Prorate, and Check.

To add or edit Payment Method Types

1. On the administration menu, select Lookups, select Programs, and then click Payment Method Types.

The Payment Method Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the type available, or clear the checkbox to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the payment method type.

For example: Check.

- 5. Select the **Revenue** check-box if the payment method generates revenue for the organization.
- 6. Click the *Save and Return* button to save the new type and return to the Payment Method Types list.

To delete a Payment Method Type

- 1. On the **administration** menu, select **Lookups**, select **Programs**, and then click **Payment Method Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a payment method type if it is currently in use.

Accounts

Account Contact Types

Account Contact Types are used to signify the relationship of a contact to an account. For example: Parent, Child, General, Physician, Spouse.

To add or edit Account Contact Types

- 1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Account Contact Types**.
 - The Account Contact Types page displays.
- 2. Do one of the following:
 - Click Add new account contact type....
 - Click the *Edit* button next to the type you want to change.
- 3. Select the **Active** check-box to make the type available , or clear the check-box to make the type inactive.
- 4. Select the **Available Online** check-box to make the account contact type available during online registration.
- Select the Available for Adult check-box to make the account contact type available to assign to an adult during online registration.
 This displays in the contact type drop downs on the *My Account* and *Contact Edit* pages in online registration
- Select the Available for Child check-box to make the account contact type available to assign to a child during online registration. This displays in the contact type drop downs on the *My Account* and *Contact Edit* pages in online registration.
- In the Description box, type the descriptive name for the account contact type.

For example, Parent.

8. Click the *Save and Return* button to save the changes and return to the Account Contact Types list.

To delete an Account Contact Type

- 1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Account Contact Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a type if it is currently assigned to an account or used as the system default.

Account Types

Account Types are used when creating a new account. For example: Individual, Family, Corporate, Vendor.

To add or edit an Account Type

1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Account Types**.

The Account Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 - Click the *Edit* button next to the account type you want to change.
- 3. Select the **Active** check-box to make the account type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the account type.
- 5. Click the *Save and Return* button to save the changes and return to the Account Types list.

To delete an Account Type

- 1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Account Types**.
- 2. Click the *Edit* button next to the account type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete an account type if it is currently assigned to an account.

Payment Term Types

Payment Term Types are used by they system to determine the due date of tuition balances for an account. You can <u>set a system default payment term type</u> for all accounts or <u>set individual term types for specific accounts</u>. The Payment Term Types lookup allows you to define what term types are available for selection in your database.

To add or edit Payment Term Types

1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Payment Term Types**.

The Account Contact Types page displays.

- 2. Do one of the following:
 - Click Add new payment term type....
 - Click the *Edit* button next to the payment term type you want to change.
- 3. Select the **Active** check-box to make the type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the type. For example, Net 90.
- 5. In the **# Days** box, type the number of days for the payment term.
- 6. Click the *Save and Return* button to save the changes and return to the Payment Term Types list.

To delete a Payment Term Type

- 1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Payment Term Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a type if it is currently assigned to an account or used as the system default.

Referral Types

Referral Types are used when adding or editing an account.

To add Referral Types

1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Referral Types**.

The Referral Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the referral type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the referral type. For example: Direct Mail, Friend, Online.
- 5. Click the *Save and Return* button to save the new type and return to the Referral Types list.

To delete a Referral Type

- 1. On the **administration** menu, select **Lookups**, select **Accounts**, and then click **Referral Types**.
- 2. Click the *Edit* button next to the referral type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a referral type if it is currently assigned to an account.

Contacts

Address Types

Address Types are used when adding an address to a contact.

To add or edit Address Types

1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Address Types**.

The Address Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Add Address Type page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the address type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the address type. For example, Home or Office.
- 5. Click the *Save and Return* button to save the changes and return to the Address Types list.

To delete an Address Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Address Types**.
- 2. Click the *Edit* button next to the address type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete an address type if it is currently assigned to a contact's address.

Child Release Option Types

Child Release Option Types can be assigned to child contacts. The Child Release Option box is located on the Miscellaneous tab of the Edit Contact page.

To add or edit Child Release Option Types

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Child Release Option Types**.
 - The Child Release Option Types page displays.
- 2. Do one of the following:
 - Click Add new item....
 - Click the *Edit* button next to the type you want to change.
- 3. In the **Description** box, type the descriptive name for the child release option type.

For example: Parent/Guardian Pick-up.

4. Click the *Save and Return* button to save the new type and return to the Child Release Option Types list.

To delete a Child Release Option Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Child Release Option Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a child release option type if it is currently assigned to a contact.

Credit Card Types

Credit Card Types are used when adding a credit card as a form of payment for a contact.

To add or edit Credit Card Types

1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Credit Card Types**.

The Credit Card Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the credit card type. For example, Visa.
- 5. Click the Save and Return by button to save the new type and return to the Credit Card Types list.

To delete a Credit Card Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Credit Card Types**.
- 2. Click the *Edit* button next to the credit card type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a credit card type if it is currently assigned as a form of payment for a contact.

Donation Types

Donation Types are used when adding a donation from a contact.

To add or edit Donation Types

1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Donation Types**.

The Donation Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 The Donation Types Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the donation type available , or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the donation type. For example, Monetary.
- 5. Click the *Save and Return* button to save the new type and return to the Donation Types list.

To delete a Donation Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Donation Types**.
- 2. Click the *Edit* I button next to the donation type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a donation type if it is currently being used in a donation record.

Follow Up Cancel Reason Types

Follow Up Cancel Reason Types are used when cancelling a follow up.

To add or edit Follow Up Cancel Reason Types

- 1. On the administration menu, select Lookups, select Contacts, and then click Follow Up Cancel Reason Types.
 - The Follow Up Cancel Reason Types page displays.
- 2. Do one of the following:
 - Click Add new item.... The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the reason type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the follow up cancel reason type.

For example No Longer Needed.

5. Click the *Save and Return* button to save the new type and return to the Follow Up Cancel Reason Types list.

To delete a Follow Up Cancel Reason Type

- 1. On the administration menu, select Lookups, select Contacts, and then click Follow Up Cancel Reason Types.
- 2. Click the *Edit* button next to the reason type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a follow up cancel reason type if it has been used.

Follow Up Types

Follow Up Types are used when adding a follow up to a note and are used to indicate the nature of the follow up. For example, Phone, E-mail, Other.

To add or edit Follow Up Types

1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Follow Up Types**.

The Follow Up Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 The Follow Up Types Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the follow up type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the follow up type.
- 5. Click the *Save and Return* button to save the new type and return to the Follow Up Types list.

To delete a Follow Up Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Follow Up Types**.
- 2. Click the *Edit* button next to the follow up type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a follow up type if it is used in a follow up.

Grade Types

Grade Types can be assigned to child contacts. The Grade box is located on the Miscellaneous tab of the Edit Contact page.

To add or edit Grade Types

1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Grade Types**.

The Grade Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Grade Types Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. In the **Description** box, type the grade. For example: Kindergarten, or 1st Grade.
- 4. Click the *Save and Return* button to save the new type and return to the Grade Types list.

To delete a Grade Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Grade Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a grade type if it is currently assigned to a contact.

Kindergarten Session Types

Kindergarten Session Types can be assigned to child contacts. The Kindergarten box is located on the Miscellaneous tab of the Edit Contact page.

To add or edit Kindergarten Session Types

1. On the administration menu, select Lookups, select Contacts, and then click Kindergarten Session Types.

The Kindergarten Session Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. In the **Description** box, type the session. For example: AM, PM, or All Day.
- 4. Click the *Save and Return* button to save the new type and return to the Kindergarten Session Types list.

To delete a Kindergarten Session Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Kindergarten Session Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a kindergarten session type if it is currently assigned to a contact.

Note Types

Note Types are used when adding a note to a contact. The Note Type indicates the nature of the correspondence. For example: E-mail Received, Phone, USPS, Other.

To add or edit Note Types

1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Note Types**.

The Note Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the type available, or clear the checkbox to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the note type.
- 5. Click the *Save and Return* button to save the new type and return to the Note Types list.

To delete a Follow Up Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Note Types**.
- 2. Click the *Edit* button next to the note type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a note type if it is used in a note.

School Types

School Types are used when including school information for a child contact on the Miscellaneous tab.

To add or edit a School Type

1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **School Types**.

The School Types page displays.

- 2. Do one of the following:
 - To add a new type, click Add new item....
 - To edit a type, click the *Edit* button next to the type you want to change.
- 3. Select the **Active** check-box to make the type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the school type.
- 5. Click the Save and Return button to save the information and return to the School Types list.

To delete a School Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **School Types**.
- 2. Click the *Edit* button next to the school type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

Note: You cannot delete a school type if it has been used.
Student Status Types

Student Status Types are used when adding a new student. For example: Attending, Alumni, Prospect.

To add Student Status Types

 On the administration menu, select Lookups, select Contacts, and then click Student Status Types.

The Student Status Types page displays.

- 2. Do one of the following:
 - Click Add new item....
 The Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the type available, or clear the checkbox to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the student status type.
- 5. Click the *Save and Return* button to save the new type and return to the Student Status Types list.

To delete a Student Status Type

- 1. On the **administration** menu, select **Lookups**, select **Contacts**, and then click **Student Status Types**.
- 2. Click the *Edit* button next to the student status type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a student status type if it is assigned to a student.

Discounts

Account Discount Types

Account Discount Types can be used to apply a discount to an account. To apply an account discount to an account, select the discount in the Discount box on the Edit Account page.

To add or edit an Account Discount Type

- 1. On the **administration** menu, select **Lookups**, select **Discounts**, and then click **Account Discount Types**.
- The Account Discount Types page displays.
- 2. Do one of the following:
 - Click Add new discount type....
 The Add Discount Type page displays.
 - Click the *Edit* button next to the discount you want to edit.
- In the Level box, select a <u>Program, Account, or Student</u> for the discount type.
- In the Application Type box, select <u>Apply Greatest Discount or</u> <u>Cumulative</u>.
- 5. In the **Description** box, type the descriptive name for the discount type. For example, 10% Preferred Customer Discount.
- 6. In the **Type** section, do one of the following:
 - Select the **Dollar** radio button to indicate that a flat dollar amount is discounted from the fee.
 - Select the **Percentage** radio button to indicate that a percentage of the fee is discounted.
- 7. In the **Amount** box, type the dollar amount or percentage for the discount.
- 8. Click in the **Comments** tab to include any special information about the discount type.
- 9. Click the *Save and Return* button to save the new discount and return to the Account Discount Types list.

To delete a Discount Type

- 1. On the **administration** menu, select **Lookups**, select **Discounts**, and then click **Account Discount Types**.
- 2. Click the *Edit* button next to the discount type you want to delete.
- 3. Click the *Delete* \times button at the top of the page.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a discount type if it is currently in use but you can clear the **Active** check box to make the discount type inactive.

Coupon Codes

Coupon Codes can be created to apply discount coupons to a registration. A coupon code can be applied when <u>registering a student</u> for a program within the Imperisoft ARS application or by the customer through an online registration.

To add or edit a Coupon Code

1. On the **administration** menu, select **Lookups**, select **Discounts**, and then click **Coupon Codes**.

The Coupon Codes page displays.

- 2. Do one of the following:
 - Click Add new coupon code.... The Add Coupon Code page displays.
 - Click the *Edit* button next to the coupon code you want to edit.
- 3. Clear the **Active** check-box to make the code inactive.
- 4. Select the **Single Use** check-box to prevent a customer from using the coupon code more than once.
- 5. In the **Level** box, select the appropriate <u>discount level</u> for the coupon.
- 6. In the Application Type box, select Apply Greatest Discount or
- Cumulative.
- In the Code box, type a code for the coupon.
 For example, if you are creating a coupon code to offer a 10% discount to new students, you might use NEW10% as a code for your coupon.

NOTE: The Code is case sensitive. When a customer types the coupon code during an online registration, he or she must type it exactly as you have typed it in the Code box.

- 8. In the **Description** box, type a description for the coupon code. Using the example above, you might type **10% New Student Discount**
- 9. In the **Type** section, do one of the following:
 - Select the **Dollar** radio button to indicate that a flat dollar amount is discounted from the fee.
 - Select the **Percentage** radio button to indicate that a percentage of the fee is discounted.
- 10. In the **Amount** box, type the dollar amount or percentage for the discount.
- 11. In the **Effective Date** box, type the first date the coupon should be available for use.
- 12. In the **Expiration Date** box, type the date the coupon code should expire and no longer be available for use.
- 13. Click the *Save and Return* button to save the new coupon code and return to the Coupon Codes list.

To delete a Coupon Code

- 1. On the **administration** menu, select **Lookups**, select **Discounts**, and then click **Coupon Codes**.
- 2. Click the *Edit* button next to the coupon code you want to delete.
- Click the *Delete* button at the top of the page.
 Click **Yes** to confirm the deletion.

NOTE: You cannot delete a coupon code that has been used. Clear the active check-box to make it inactive.

Discount Levels

Discount Levels are used when creating Account or Coupon Code discounts. There are three levels of discount: Account, Program and Student.

There are two calculation types: % Percentage and \$ Dollar Amount

When using a % type discount, the Level assigned has no impact on the way the discount is calculated. A % type discount is applied to the total balance for each registration, regardless of the number of students or registrations for the account.

When using a \$ type discount however, the Level that is chosen changes the way the discount is calculated or when it is applied.

• **Account**: When selected, the discount is given once for the account per charge month.

For example; if an account has a \$10 Account Level discount assigned, and the customer registers for programs in January, the discount is applied, subtracting \$10 from the total due.

*The discount will not be applied to subsequent registrations until the next charge month, February.

• **Program**: When selected, the discount is always applied to each registration or recurring charge.

For example: if an account has a \$10 Program Level discount assigned, and the customer registers for programs in January, the discount is applied, subtracting \$10 from each registration. If the customer registers for three programs, \$30 is subtracted from the amount due.

*The discount is applied for all additional registrations during January and all subsequent months until or unless the discount is removed from the account.

• **Student**: When selected, the discount is applied once per student for the given account, per charge month.

For example: if an account has a \$10 Student Level discount assigned, and the customer registers 2 students for programs in January, the discount is applied, subtracting \$10 from the first registration for each student. If each student registers for three programs, \$20 is subtracted from the amount due. *The discount will not be applied to subsequent registrations until the next charge month, February.

Apply Greatest and Cumulative Discount Options

The Apply Greatest Discount and Cumulative discount options are considered when two or more discounts are being applied to a registration at the same time. For example, if an account is assigned an <u>Account Discount</u>, and the customer uses a <u>Coupon Code</u>, the system must determine which discount is appropriate or if both discounts should be applied to the registration.

Apply Greatest: When two or more discounts are being used at one time, the system will only apply the greatest discount if any of the discounts have Apply Greatest selected.

Cumulative: When two or more discounts are being used at one time, the system will apply all discounts only if each of the discounts have Cumulative selected.

Imperisoft ARS

General

File Types

File Types are used when uploading documents to the File Library to include in an e-mail.

To add or edit File Types

- 1. On the **administration** menu, select **Lookups**, select **General**, and then click **File Types**.
 - The File Types page displays.
- 2. Do one of the following:
 - Click Add new item....
 The File Types Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. In the **Description** box, type the descriptive name for the file type. For example: Charcoal.
- 4. Click the *Save and Return* button to save the new type and return to the File Types list.

To delete a File Type

- 1. On the **administration** menu, select **Lookups**, select **General**, and then click **File Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a file type if it is currently in use.

Image Types

Image Types are used when uploading an image or picture for use in a report or contact.

To add or edit Image Types

1. On the **administration** menu, select **Lookups**, select **General**, and then click **Image Types**.

The Image Types page displays.

- 2. Do one of the following:
 - Click **Add new item...**. The Image Types Add Item page displays.
 - Click the *Edit* button next to the type you want to edit.
- 3. Select the **Active** check-box to make the image type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the image type. For example: Charcoal.
- 5. Click the *Save and Return* button to save the new type and return to the Image Types list.

To delete a Image Type

- 1. On the **administration** menu, select **Lookups**, select **General**, and then click **Image Types**.
- 2. Click the *Edit* button next to the type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a image type if it is currently in use.

Imperisoft ARS

Locations

Cities

Cities are used when creating rooms and locations for programs.

To add or Edit a City

1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Cities**.

The Cities page displays.

- 2. Do one of the following:
 - Click Add new city....
 - Click the *Edit* button next to the city you want to edit.
- 3. Select the **Active** check-box to make the city available, or clear the check-box to make it inactive.
- 4. In the **State** box, click to select the state in which the city is located.
- 5. In the **Name** box, type the name of the new city.
- 6. Click the Save button to save the information.
- In the Locations tab, click <u>Add location...</u> to add a new location for programs.
- 8. Click the *Save and Return* button to save the information and return to the Cities list.

To delete a City

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Cities**.
- 2. Click the *Edit* button next to the city you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a city if it is used in a location.

Countries

You can use the Countries lookup to add additional countries to Imperisoft.

To add or edit a Country

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Countries**.
- The Countries page displays.
- 2. Do one of the following:
 - To add a new country, click Add new country....
 - To edit a country, click the *Edit* button next the country you want to change.
- 3. Select the **Active** check-box to make the country available, or clear the check-box to make it inactive.
- 4. In the **Name** box, type the name of the country.
- 5. In the **Abbreviation** box, type the correct abbreviation for the country.
- 6. Click the *Save and Return* button to save the information and return to the Countries list.

To delete a Country

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Countries**.
- 2. Click the *Edit* $\mathbf{\overline{B}}$ button next to the country you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a country if it has been used.

Location Types

Location Types are used when adding locations.

To add or edit a Location Type

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Location Types**.
- The Location Types page displays.
- 2. Do one of the following:
 - To create a new location type, click Add new item....
 - To edit a location, click the *Edit* button next to the location type you want to change.
- 3. Select the **Active** check-box to make the location type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the location type.
- 5. Click the *Save and Return* button to save the information and return to the Location Types list.

To delete a Location Type

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Location Types**.
- 2. Click the *Edit* button next to the location type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a location type if it is used in a location.

Adding/Editing a Location

Locations are used when adding new programs or events to the system. They are associated with rooms and accessed through the Cities lookup.

To add or edit a location

1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Cities**.

The Cities page displays.

- 2. Do one of the following:
 - If the location's city appears in the list, click the *Edit* button next to the city.
 The Edit City page displays

The Edit City page displays.

- If the location's city does not appear in the list, click **Add new city...**. and <u>add the city</u> to the list.
- 3. In the **Locations** tab, do one of the following:
 - To add a new location, click Add location....
 - To edit a location, click the *Edit* button next to the location you want to change.
- 4. In the **Type** box, select a location type.
- 5. In the **Name** box, type the name of the location.
- 6. In the **Address Line One** and **Address Line Two** boxes, enter the street address of the location.
- 7. If needed, change the **City** box to the correct city for the location.
- 8. In the **Postal Code** box, type the postal code for the location.
- 9. Click the *Save* button to save the changes.
- 10. In the **Rooms** tab, click <u>Add room...</u> to add a room to the location.

To delete a location

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Cities**.
- 2. Click the Edit sutton next to the city in which the location resides.
- 3. Click the *Edit* button next to the location you want to delete.
- 4. Click the *Delete* \times button.
- 5. Click **Yes** to confirm the deletion.

NOTE: You cannot delete location if it is assigned to a room or program.

Room Types

Room Types are used when adding rooms for programs.

To add or edit a Room Type

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Cities**.
- The Room Types page displays.
- 2. Do one of the following:
 - To add a new room type, click Add new item....
 - To edit a room type, click the *Edit* button next to the room type you want to change.
- 3. Select the **Active** check-box to make the room type available, or clear the check-box to make the type inactive.
- 4. In the **Description** box, type the descriptive name for the room type.
- 5. Click the *Save and Return* button to save the information and return to the Room Types list.

To delete a Room Type

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Room Types**.
- 2. Click the *Edit* button next to the room type you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

Note: You cannot delete a room type if it has been used.

Adding/Editing a Room

Rooms are used when adding new programs or events to the system. They are associated with locations and accessed through the Cities lookup.

To add or edit a room

1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Cities**.

The Cities page displays.

2. Click the *Edit* button next to the city in which the appropriate location resides.

The Edit City page displays.

3. In the **Locations** tab, click the *Edit* button next to the location for the room.

The Edit Location page displays.

- 4. In the **Rooms** tab, do one of the following:
 - To add a new room, click Add room....
 - To edit a room, click the *Edit* button next to the room you want to change.
- 5. In the **Type** box, select a <u>room type</u>.
- 6. If necessary, in the Location box, select the correct location.
- 7. In the **Description** box, type a room number or description for the room.
- 8. Click the *Save* button to save the changes.

To delete a Room

1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **Cities**.

The Cities page displays.

Click the *Edit* button next to the city in which the appropriate location resides.

The Edit City page displays.

3. In the **Locations** tab, click the *Edit* button next to the location for the room.

The Edit Location page displays.

- 4. In the **Rooms** tab, click the *Edit* button next to the room you want to delete.
- 5. Click the *Delete* [×] button.
- 6. Click **Yes** to confirm the deletion.

NOTE: You cannot delete a room that is being used.

States

You can use the States lookup to add additional states or provinces to Imperisoft.

To add or edit a state or province

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **States**.
- The States page displays.
- 2. Do one of the following:
 - To add a new state or province, click Add new state....
 - To edit a state or province, click the *Edit* button next to the state you want to change.
- 3. Select the **Active** check-box to make the state available, or clear the check-box to make it inactive.
- 4. In the **Country** box, select a country from the list.
- 5. In the **Name** box, type the state name.
- 6. In the **Abbreviation** box, type the abbreviation for the state or province.
- 7. Click the *Save* 🖥 button to save the information.
- 8. Click **Add city...** in the Cities tab to add cities to the state.
- 9. Click the *Save and Return* button to save the new city and return to the Cities list.

To delete a State

- 1. On the **administration** menu, select **Lookups**, select **Locations**, and then click **States**.
- 2. Click the *Edit* button next to the state you want to delete.
- 3. Click the *Delete* \times button.
- 4. Click **Yes** to confirm the deletion.

Note: You cannot delete a state that is being used in an address or is associated to a city.

Set up Semesters and Programs

To create a schedule of programs in Imperisoft you must first create a Semester in which to create the program(s). A Semester is a grouping of programs.

Click here to learn how to add or change semesters

Click here to learn about how to add programs to a semester

Note: The terminology for Semester can be changed to accommodate the needs of your organization. For example, you can use the term Season, Quarter, or Program Group to refer to a semester. See the help topic <u>Chooseing Terminology</u> for more information.

Adding/Editing a User

If you are the administrator for your organization, or if you have been given special administrative permissions, you can create new user accounts or make changes to existing user accounts in Imperisoft.

If your organization has more than one Unit, click here for instructions for adding users to a specific Unit, otherwise use the instructions below.

To create a new user

- 1. In the administration menu, click Manage Organization.
- 2. Click the Users tab, and then click Add new user....
- 3. In the **First Name** box, type the first name of the user.
- 4. In the Last Name box, type the last name of the user.
- 5. In the **Username** box, type a unique ID the user will use to log in to the system.
- 6. In the **Phone** box, type the phone number for the user.
- 7. In the **E-mail** box, type the user's e-mail address.
- 8. Click the *Save and Return* button to save the new user and return to the **Edit Organization** page.
- 9. Click the Manage Roles link to the right of the user's name in the User's tab to assign permissions to the user.
- 10. Select the appropriate role from the list and then click the *Save and Return* button.

Follow these steps for each unit to which the new user should have access:

- 1. Click the Units tab.
- 2. Click the *Edit* button next to the unit.
- 3. In the Users tab, click Manage Users.
- 4. In the **Manage Users** page, select the check-box next to the new user, and then click the *Save and Return* button.

Note: These steps are important in order for the user to display in the **Followups Assigned To** box.

To edit a user

- 1. In the administration menu, click Manage Organization.
- 2. Click the **Users** tab, and then click the *Edit* button next the user you want to change.
- 3. Clear the **Active** check-box to make the user inactive.

- 4. Type in the **First Name**, **Last Name**, **Username**, **Phone** or **E-mail** box to change the user's information.
- 5. Click the *Save* button to save the changes.
- 6. Click the **Change Password** link at the top of the page to change the password.
- a. Type the new password in the **New Password** box.

A password cannot be more than 8 characters in length.

b. Click in the **Confirm New Password** box and type the new password again.

c. Click the *Save and Return* button to save the new password and return to the Edit User page.

- 7. Click the **Clear Saved Settings** link at the top of the page to reset all saved user settings. These settings include:
 - Filter, Result Fields and Sorting settings in the search pages
 - My Settings options on the Home page

Each tab located at the bottom of the page allows you to view or change information about the user's access to the system.

- Units: Lists the units to which the user belongs.
- Roles: Lists all roles the user is assigned in the system.
- Security History: Lists actions taken related to security.

To delete a user

- 1. In the **administration** menu, click **Manage Organization**.
- 2. Click the **Users** tab, and then click the *Edit* button next the user you want to delete.
- 3. Click the *Delete* \times button.

Note: You cannot delete a user once the user has made changes in the system. Clear the check-box to inactivate a user.

Managing Security Roles

A role in Imperisoft is a set of permissions that you can assign to specific users. You must create roles and assign them to users in order for your users to have access to add or edit data in the system.

There are two types of roles in Imperisoft. Organization roles are roles set at the organization level. When a user is assigned an organization role, he or she has the permissions defined in within the role to the entire organization.

Unit roles are set at the unit level. When a user is assigned a unit role, he or she has the permissions defined within the role but only for the specific unit. Unit Roles are generally used within organizations that have multiple Units. If you have only one Unit in your organization you should most likely use the Organization Roles tab.

To add a role

- 1. In the administration menu, click Manage Organization.
- 2. Do one of the following:
 - To add an organizational role, click the **Organization Roles** tab, and then click **Add new role...**.
 - To add a unit role, click the **Unit Roles** tab, and then click **Add new role...**.
- 3. In the **Name** box, type the name of the new role.
- 4. In the **Description** box, type a brief description of the role.
- 5. Click the Save abutton to save the new role.
- 6. Use the **Permissions** tab to assign specific permissions to the role.
- 7. Use the **Users** tab to assign users to the role.
- 8. Use the **Security History** tab to view actions taken related to the role.

To edit a role

- 1. In the administration menu, click Manage Organization.
- 2. Do one of the following:
 - To edit an organizational role, click the **Organization Roles** tab.
 - To edit a unit role, click the **Unit Roles** tab.
- 3. Click the *Edit* \blacksquare button next to the role you want to change.
- 4. In the **Name** box, type to change the name of the role.
- 5. In the **Description** box, type to change the description of the role.
- 6. Click the *Save* button to save the changes.
- 7. Use the **Permissions** tab to change the permissions assigned to the role.
- 8. Use the **Users** tab to change which users are assigned to the role.
- 9. Use the **Security History** tab to view actions taken related to the role.

Choosing Terminology

You can customize the terminology for various elements of your Imperisoft database.

- 1. In the **administration** menu, click **Manage Organization**, and then click the **Terminology** tab.
- In the Persons who register are called a: box, type the term you want the system to use when referring to a registrant.
 For example, you might use Student or Participant. The default term in Imperisoft is Student.
- In the The plural of Student is: box, type the plural form of the term you typed in step 2.
 For example, if you used Student in step 2, type Students. The default term
- in Imperisoft is Students.
 4. In the Students register for and attend a single: box, type the term you want the system to use when referring to a program.
 For example, you might use Class, Program, Course, or Event. The default term in Imperisoft is Program.
- In the **The plural of** *Program* is: box, type the plural form of the term you typed in step 4.
 For example, if you used Class in step 4, type Classes. The default term in Imperisoft is Programs.
- 6. In the **Students study a:** box, type the term you want the system to use when referring to a subject of study.
 - The default term in Imperisoft is *Medium*, but your organization may want to use something like *Subject*.
 - *Media* types are <u>assigned to programs</u> and can be used as an additional filter in online registration.
- 7. In the **The plural of** *Medium* **is:** box, type the plural form of the term you typed in step 6.

For example, if you used Subject in step 6, type Subjects. The default term in Imperisoft is *Media*.

- 8. In the **For** *Programs*, *Students* **receive a:** box, type the term used to give the <u>student's registration</u> a Mark or Grade. The default term in Imperisoft is *Mark*.
- In the **The plural of** *Mark* is: box, type the plural form of the term you typed in step 8.
 For example, if you used Grade in step 8, type Grades. The default term in
- Imperisoft is *Marks*.
 10. In the *Programs* are grouped into a single: box, type the term used when referring to a group.
 For example, you might use Semester, Term or Program Group in this box.

For example, you might use Semester, Term or Program Group in this box. The default term in Imperisoft is *Semester*.

11. In the **The plural form of** *Semester* is: box, type the plural form of the term you used in step 10.For example, if you used Semester in step 10, type Semesters. The default term in Imperisoft is *Semesters*.

12. In the *Programs* can be packaged and sold together in one: box, type the term used when referring to a set of programs grouped together to be sold as one.

For example, you might use Bundle or Package. The default term in Imperisoft is *Bundle*.

13. In the **The plural form of** *Bundle* is: box, type the plural form of the term you used in step 12.

For example, if you used Package in step 12, type Packages. The default term in Imperisoft is *Bundles*.

14. In the *Programs* and *Semesters* together are: box, type the term used when referring to the two terms together. The default term in Imperisoft is *Courses.*

This determines the name of the menu where *Semesters*, *Programs* and *Bundles* reside.

- 15. In the **Contacts can purchase a:** box, type the term used when referring to a membership.
- 16. In the **The plural of** *Membership* is: box, type the plural form of the term defined in step 15.
- 17. In the **A person who purchases a Membership is a:** box, type the term used for a person who purchases a membership.
- 18. In the **The plural of** *Member* is: box, type the plural form of the term used in step 17.

NOTE: If you choose to change any of this terminology, you will have to refer to the default terminology when looking for related help topics.

Managing Your Organization

In order to properly administer your Organization in Imperisoft it is important to understand the overall structure of the system.

Your organization can have one or more units in Imperisoft. Each user created in Imperisoft might have access to the entire organization, or to only one or more of the Units within the organization.

To edit Organization information

- 1. In the **administration** menu, click **Manage Organization**. The Edit Organization page displays.
- 2. If needed, click in the Name box to edit the name of your organization.
- In the # Days to Find Open Slot box, type the number of days out the system should search for available seats when registering a student for programs.
 - In the days in the past box type the number of days in the past the system should allow for scheduling Make-ups and for scheduling Intros and Transfers for recurring programs.
- 4. In the **Registration Fee Account Code** box, type the account code you want to assign to registration fees.
- 5. In the **Fiscal Year** boxes, select a beginning and ending month to indicate the fiscal year for your organization.

Each tab located at the bottom of the page allows you to manage specific areas of the Imperisoft system. Click the links below to find more information about each of the areas.

- <u>Terminology</u>: This tab allows you to specify the terminology you want to use for students, programs and semesters.
- Report Image: This tab allows you to include an organization specific image or logo to include on invoices and reports generated from Imperisoft.
- Invoice: Allows you to set conclusion text for invoices.
- <u>Units</u>: Allows you to edit unit information or add additional units.
- <u>Organization Roles</u>: This area is used to define security rolls at the organizational level.
- <u>Unit Roles</u>: This area is used to define security rolls at the unit level.
- <u>Users</u>: Allows you to add and edit users.

Managing Units

The Units tab on the Edit Organization page allows you to specify settings for each unit in your organization.

To make changes to a unit

- 1. Do one of the following:
 - If you are logged into the unit you want to change, in the administration menu, click Manage Unit.
 - If you are not logged into the unit you want to change, in the administration menu, click Manage Organization, and then click

the *Edit* **button** next the unit you want to change.

- 2. Click in any of the **Primary Phone** or **Secondary Phone** box to change a phone number for the unit.
- 3. Click in the **Default Payment Terms** box to change the default payment terms for invoices generated for accounts. If left blank, the system default payment term is Net 30.
- 4. Select the **Show CC Options on Invoice?** check-box to display active credit card types as optional payment methods on invoices.
- 5. Select the **Check for scheduling conflicts?** check-box to have the system notify you or the customer during online registration when a *scheduling conflict occurs* during the registration process.

A scheduling conflict is when one student is being registered for a program that overlaps with another program the student is registered for or is being registered for.

When this occurs, a notification appears informing the Imperisoft user or online registration customer that the conflict exists. It will allow you to continue with registration or go back and change your program selection.

- 6. Click in the Name box to edit name of the unit.
- 7. Use the Address Line One, Address Line Two, City, State, and Postal Code boxes, to change the address of the unit.
- 8. Click the *Save* button to save the changes.
- 9. Use the <u>Online Registration Settings tab</u> to establish settings for your online registration site such as search filter and result options.
- 10. Use the **Online Registration Text** tab to establish custom text for various pages on your online registration site.
- 11. Use the **Terms of Use** tab to type text that you want online registrants to agree to before completing online registration for programs or events.
- 12. Use the Users tab to add users to the unit.

- In the **Users** tab, click **Manage users...** to add existing users to the unit.
- In the **Users** tab, click <u>Add new user...</u>to create a new user.

Online Registration

Online Registration Overview

Through Imperisoft's online registration solution customers can register, wait list, make payments, review account history, add or modify account contacts, and edit contact information.

By default, the online registration Search page is the first page that your customers see.

On this page a customer can use the filters to <u>search for programs</u>, or use the Login box to log into an existing account or to create a new account.

		ONL Regist	INE	
Purchase Membership Help				
Search for Programs				
Select your semester of interest and optionally	select a medium	and/or an instructor		
* = required field				LOGIN Jsername: Passvord:
*Semester	Medium	Instructor		
Select Semester	Any 🔽	Any	N	Login
Search Show: Programs OBundles	i		,	New User? Start Here
			_	
				SCHEDULE Programs in schedule: 0
			L	

The Search Filters that display can be changed within the <u>Online Registration</u> <u>Settings tab</u> of the Edit Unit page.

The text that appears at the top of the Search for Programs page can be customized within the <u>Online Registration Text tab</u> of the Edit Unit page.

Online Registration Customer Login

If the customer already has Username and Password, he can log into his account using the Login box located on the right side of the Online Registration Search page.

L	DGIN
Username:	Password:
Login	
Forgot your pas	ssword?
New User? Sta	irt Here

If the customer has a contact record with his e-mail address in your Imperisoft database, he can click the **Forgot your password?** link to obtain his Username and Password. The login information will be e-mailed to him.

Login Help	
Please enter your e-mail address below and we will sen	d your login information to you.
E-mail address:	
Submit	

If the customer is new to your organization he can create an account by clicking the **New User? Start Here** link.

Online Registration New Account

If a customer is new to your organization he can create an account by clicking the **New User? Start Here** link in the Login box located on the right side of the Online Registration Search page.

Once clicked, the New Account page appears, and the customer must complete all required fields. Required fields are marked with a red asterisk.

New Account
Required fields are denoted by *
Personal Info
* What best describes your relationship to this account?
* How did you hear about us?
* First Name: M.I.: * Last Name:
Gender:
Date of Birth:
* Usemame:
* Password: (4-8 characters)
* Confirm Password:
* Home Phone: (xxx-xxx-xxxx)
Work Phone: (xxx-xxx-xxxx) ext.
Mobile: (xxx-xxx-xxxx)
* E-mail:
Primary Address
* Address Line One:
Address Line Two:
* City:
* State: V Postal Code:
Submit

After clicking the **Submit** button, if all information is accepted a welcome page appears and the customer can continue with registration or click one of the options at the top of the page to manage his account.



Online Registration Customer Account

When a customer is <u>logged in</u> to Online Registration and clicks the **My Account** link at the top of the page he sees the My Account page.

The My Account page allows the customer to update contact information, purchase a membership, change his password, add additional contacts to his account, view current registrations, memberships and current charges.

A	ME Education	ONLINE Registration	
Search Purch	ase Membership Change Password Log Out		
My Accoun	t		
lequired fields are de	noted by *		
Personal Info			WELCOME
• Relationship:	General 👻 Emergency Contact? 🗹		Hello, John Smith
• First Name:	John M.I.: * Last Name: Smith		
Gender: [¥		Programs in schedule: 0
Date of Birth:			
* Username:	JSmith123		
* Home Phone:	555-555-5555 (xxx-xxxx)		
Work Phone:	(xxx-xxx-xxxx) ext.		
Mobile:	(xxx-xxx-xxxx)		
* E-mail:	jsmith123@fontdrift.com		
Primary Address			
* Address Line Or	e: 3232 E 1st		
Address Line Tw	10:		
* City:	Anthem		
* State:	Arizona 💙 * Postal Code: 85086		
Save			
Contacts ¹ Regis	trations ³ Memberships ⁴ Open Charges ⁶	32	
Type First Nam	e Last Name * Adult Active Emergency		
Add new addre (age as and overjan provide the clination		

Online Registration Searching for Programs

When a customer first accesses your organization's Online Registration page he or she can begin searching for programs by using the filters you have chosen.

The first available filter, and the one that is required is the *Semester* filter. Once a semester is selected and the customer clicks the **Search** button, a list of programs within that semester will display.

Remember that you can change the terminology for Semester to Program Group, Quarter, Season, etc...

If you change the terminology for semesters the term you choose to use internally will be the same term your customers see within the Online Registration.

		Reg	NLINE	
Purchase Membership Help				
Search for Programs Select your semester of interest and optionally * = required field	select a medium	and/or an instru	ctor	LOGIN Username: Passvord
*Semester	Medium	Instruct	or	
Search Show: ③ Programs ○ Bundles	<u> </u>			Forgot your password? New User? Start Here SCHEDULE
Sample Children's Classe Clun 1-Dec 31, 2009 Meets 8:00 AM-11:00 AM of Medium: Level: Beginner Tuition: \$50.00 (Member Discount Available) Status: Available Begin Registration	n Mon Tue Wed T	'h Fri		Programs in schedule:
Showing 1-1 of 1				

See <u>Choosing Terminology</u> for more information.

The customer can choose to use any additional <u>filters you have chosen to display</u> or select a program from the list by clicking the **Begin Registration** link.

- If the customer is logged in, the Select Student page will display.
- If the customer is not yet logged in, the online registration system will prompt him to <u>log into his account or to create an account</u>.

Online Registration Making Payments

If a customer owes a balance, he can make incremental payments through the Online Registration account if you have enabled the option within <u>Online Registration</u> <u>Settings</u>.

If the option is enabled, when a customer logs into the online registration account and owes a balance, he will see the balance information in the Welcome box.



To make a payment

- 1. Click on the Make payment now... link.
- 2. In the Pay Balance page do one of the following:
 - To pay the full balance, skip to step 3
 - To pay a partial amount, select **Partial Amount**, type the amount in the box, and then click the **Confirm Partial Payment** box. Then move on to step 3.
- 3. Complete the billing information and then click the **Submit** button at the bottom of the page.

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	lance						
Open Char	ges:						
Student	Class	Description	Posted On	Due Date	Amount	Balance	
John Smith	Pharmacy Technician	Tuition Balance	11/18/2009	11/18/2009	395.00	100.00	
I would lik	e to pay:						
⊙ In Full (○ Partial A	\$100.00) Amount:	Confirm Partia	l Payment				
Amount D)ue: \$100.00						
Please sel	ect your credit card	for payment:					
Card Tr	ype edit Card	Last 4 Digits	Ca	rdholder Na	me		Expiration Date
Require	d fields are denoted by	bold text					
Condit	Card Type:	×					
crearco		printed and a state of the stat					
Credit	Card Number:		(no sp	aces or dashes,	,		
Credit (Expirat	Card Number: ion (month, year):		(no sp	aces or dashes. 🗸)		
Credit (Expirat Cardho	Card Number: ion (month, year): Ider Name (first, last):		(no sp	aces or dashes,	_		
Credit (Expirat Cardho Billing /	Card Number: ion (month, year): Ider Name (first, last): Address (Street):		(ho sp	aces or dashes,]		
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Credit (Expirat Cardho Billing / Billing /	Card Number: tion (month, year): Ider Name (first, last): Address (Street): Address (City): Address (State):		(no sp	eces or deshes.			
Credit (Expirat Cardho Billing / Billing / Billing /	Card Number: ion (month, year): Ider Name (first, last): Address (Street): Address (City): Address (State):		(no sp	aces or dashes.			
Credit (Expirat Cardho Billing / Billing / Billing / Billing /	Card Number: ion (month, year): lder Name (first, last): Address (Street): Address (City): Address (State): Address (Postal Code):		(no sp	eces or deshes			

Configuring Online Registration

Configuring Online Registration

There are several steps to setting up Online Registration before you making available to your customers.

- Ensure you have selected at least one <u>Account Contact Type</u> to be available online for Adult contacts and take into consideration any needs you might have for Child contacts if that applies to your organization.
- If you charge tuition for your programs and plan to allow your customers to pay online, you will need to set up a *Payment Gateway* with an approved provider and *work with an Imperisoft Support representative* to ensure it has been properly set up and tested within Imperisoft.

If needed, contact a support representative at <u>Support@Imperisoft.com</u>.

A payment gateway is a "virtual" credit card terminal. It takes online credit card transactions from your Imperisoft site and sends them to the processing bank to seek an approval, or decline, and return it to your system so you can complete the transaction (or ask for another form of payment).

- Verify the list of <u>Credit Card Types</u> available for payment match the credit card types you have set up with the payment gateway and your merchant services provider to accept.
- Ensure you have <u>created your class schedule</u> and made the appropriate classes <u>available online</u>.
- Reviewed the <u>Online Registration Settings</u> and <u>Online Registration Text</u> tabs of the Edit Unit page to ensure you have selected appropriately from the available settings and options.
- Once you have completed all necessary steps, are happy with the look and behavior of your Online Registration, you'll want to <u>link your company website</u> to the online registration page.

Online Registration Settings Tab

The Online Registration Settings tab in the Edit Unit page allows you to set many options for the layout and functionality of your online registration page.

To open the Online Registration Settings tab

- 1. In the administration menu, click Manage Unit.
- 2. Click the Online Registration Settings tab.
- 3. Change any of the following settings as appropriate for your company:
 - Select the **Require Location Selection?** box to require that customers first select a location before being presented with the Semester/Program Group search filter.
 - If selecting the Require Location Selection? box, select Include City in Location Selection? box to present a secondary City filter.
 - Select from the available **Search Filters** options to change the online registration search filters from the default. The default filters are Semester, Media, Instructor.
 - Select Location and/or select Instructor next to Include in Search Results: to display Location information and/or Instructor information in the search results during online registration.
 - Select the **Users Can Drop Registrations** check-box to allow online registrants to drop registrations through the registration web site.

NOTE: This is intended for use with companies providing online registration for internal employees or where programs are open for registration without cost. When a registration is dropped through online registration, no refunds occur.

- Select the **Show School Fields for Children?** box to display the school information fields when a child is added in online registration. The school fields are located in the Edit Contact page on the Miscellaneous tab.
- Select the **Include School Type & State** box if you wish to also display the School Type and School State boxes as part of the School Fields for Children in the online registration.
- Select the **Show Referred By?** box to make the **How did you hear about us?** box display in the New Account page within online registration.
- Select the **Require Referred By?** box to make the **How did you hear about us?** box in the online registration a required field.

NOTE: This drop down box in online registration corresponds to the **Referred By** box in the Edit Account page within the application. The items that display in the drop down box are controlled by the <u>Referral Types</u> lookup.

- Select the **Allow Partial Payments?** box to allow customers to log back into their accounts online to make additional payments.
- Complete the **Send Payment E-mails To:** boxes to receive notification of successful and unsuccessful credit card transactions.
• Click the *Save* button to save the changes.

Online Registration Text Tab

The Online Registration Text tab in the Edit Unit page allows you to set many text options for your online registration page.

To open the Online Registration Text tab

- 1. In the administration menu, click Manage Unit.
- 2. Click the Online Registration Text tab.
- 3. Change any of the following settings as appropriate for your company:
 - In the **Site Name** box type the name of your organization as you would like it to appear at the top of the online registration page.
 - Type a label in the **Location Type Label:** box if you are using the Set Location option in the Online Registration Settings tab, and would like to change the default label for Location Type. If blank, the Location Type label is *Location Type*.
 - In the **Seat Cap Reached Message** box, type the message you want to appear when the online registration cap has been met for a program.

NOTE: If the message box is left blank, the following default message appears: *Online Registration Closed -- Please Call xxx-xxx-xxxx*. (xxx-xxx-xxxx = Primary Phone number for the Unit)

• In the **Search Page Introduction:** box, type the text that you would like to appear at the top of the online registration Search page.

NOTE: If the box is left blank, the following default text appears: *Select your semester of interest and optionally select a medium and/or an instructor*

• In the **New Account Page Introduction:** box, type the text that you would like to appear at the top of the online registration New Account page.

This is the page that appears when a customer creates a new account in online registration.

- In the Select Students Page Introduction: box, type the text that you would like to appear at the top of the online registration Select Students page.
 This is the page that appears when a customer selects a class for registration to prompt him or her to choose the student who should be registered.
- In the **Confirmation Page Introduction:** box, type the text that you would like to appear at the top of the online registration Confirmation

page.

• Type text in the **Do Not Reply Message** box to customize the Do Not Reply message text that displays in the Online Registration Payment Confirmation E-mail message sent to customers after registering online.

If left blank, the default text in the Do Not Reply Message is:

Please note: This e-mail message was sent from a notification-only address that cannot accept incoming e-mail. Please do not reply to this message.

NOTE: Imperisoft recommends that you do customize this message to include a phone number or e-mail address to provide a point of contact for your customers.

• The text in the **Coupon Code Override Message** box displays on the Confirmation Page of an online registration if a customer enters a coupon code, but the code is not used due to other superceding discounts; for example, if a customer's account has an Account discount in which the <u>Apply Greatest application type</u> is specified and the discount amount is greater than that of the coupon.

If left blank, a customer in the above situation would see the following default message:

Please Note: You have qualified for multiple discounts, but only one can be applied at this time. We have applied the greatest possible discount to your total.

• Click the *Save* button to save the changes.

Linking to Online Registration

Simple link to main Search Page

To link your company's website to your Online Registration search page simply copy the URL that you see when you click on the **online registration** link on the right side of the Imperisoft menu and give this URL to the person who manages your company website. The URL is unique for each unit but will look similar to the following:

http://reg132.imperisoft.com/SampleUnit/Search/Registration.aspx

Advanced Linking

You can also do some more complex linking by using the parameters described below along with the specific components of your Online Registration URL. For example, if you would like to link to the Online Registration search page with the Semester pre-selected and the list of all classes within that Semester showing, you can do so by using the following url:

http://reg132.imperisoft.com/ExSearch.aspx?unit=SampleUnit&sem=X

X = the ID of the Semester. So you would need to look up the Semester ID for the Semester you want to display and insert that in place of the *X* above. For example, if the Semester was assigned ID 38, the URL would be:

http://reg132.imperisoft.com/ExSearch.aspx?unit=SampleUnit&sem=38

NOTE: You need to be careful that you are using the exact http://reg###.imperisoft.com and Unit Name that is designated by the URL assigned to your company.

You can link to search results using any of the <u>available Filters</u> that you have selected for your online registration. To do so, use the same URL but simply insert parameters in place of the X based on the grid below with the specific ID for the record in place of the y.

http://reg132.imperisoft.com/ExSearch.aspx?unit=SampleUnit&X=y

The grid below provides details on how to construct the querystring but note that the parameter is only valid if that field is being used as a filter in your Online Registration:

Parameter	Required?	Notes
unit	Yes	This is the name or ID of the Unit. In the example above it is <i>SampleUnit</i> but for your organization it would be the Unit Name or Unit ID.
sem	Yes	This is the ID of the Semester to search.

med	No	This is the Media Type id. (Subject)
pt	No	This is the Program Type id.
prod	No	If not included, defaults to Program. If you want to display Bundles, include the parameter and the value is the Bundle ID.
loc	No	Location ID
inst	No	Instructor ID
st	No	This is the Start Time for the program
md	No	This is the meet day of the program. Can only be a single value, one of the following: mon, tue, wed, thu, fri, sat, sun

You can also link directly to the **Program Details** as well by simply locating the program though the online search and clicking on the details, then copy and paste the URL from the browser window to create the link from your website.

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