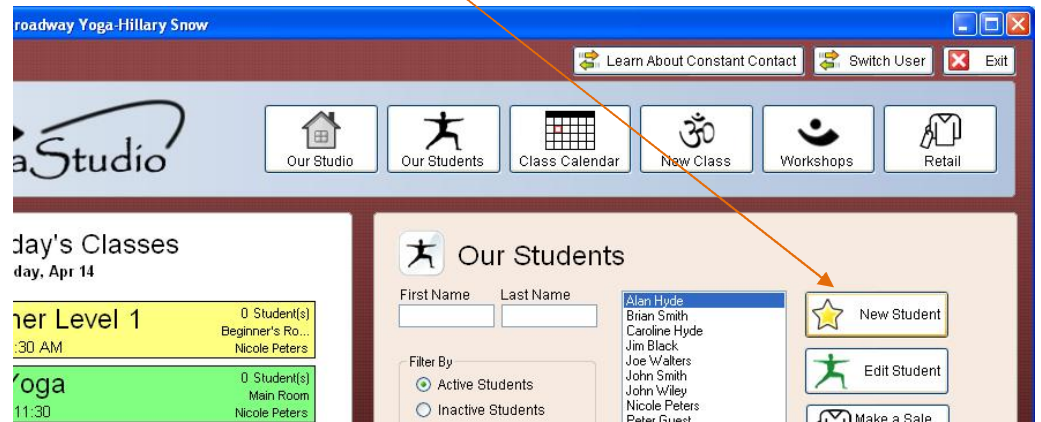


Tutorial 3: Adding a New Student Record

This tutorial explains how to add a new student. A student can be added either from the Switchboard form or directly from a class or workshop. To add a student from a class or workshop, go to step 7.

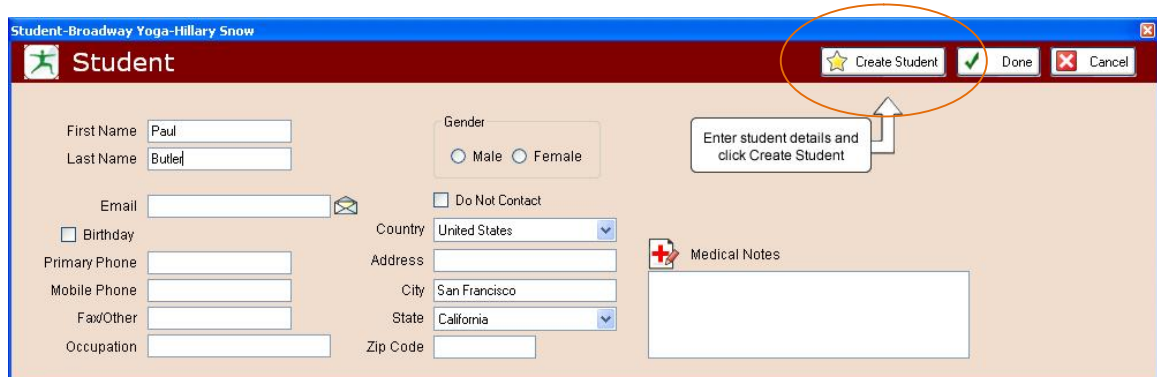
To add a student from the Switchboard, click on “New Student.”



Step 1: Enter Student Details

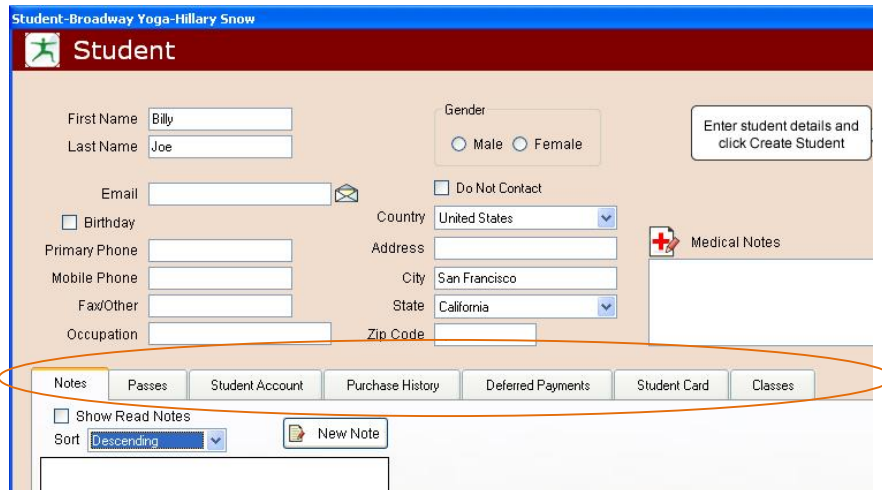
The student’s first and last name are the only required fields. Other fields are optional, including:

- “Birthday” is a pop-up calendar from which you choose the date.
- “Do Not Contact” allows you to exclude the student from all email communications
- “Medical Notes” records important medical information about the student that will be displayed every time the student is signed in to a class.



Step 2: Create the Student Record

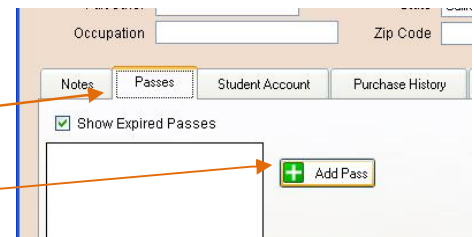
Once you have clicked on “Create Student” the form will expand allowing you to enter more information using the tabs Notes¹, Passes, Student Account, Purchase History, Deferred Payment, Student Card and Classes.



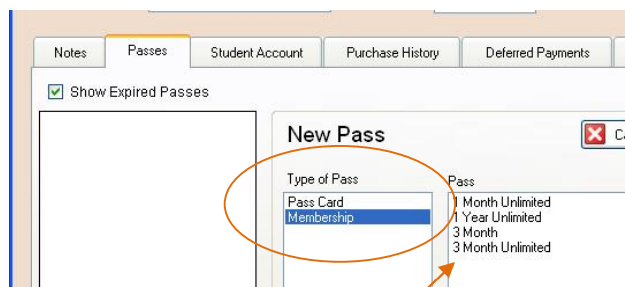
Step 3: Add a Membership or Passcard

1. Click on the *Passes* tab.

2. Click on *Add Pass*.



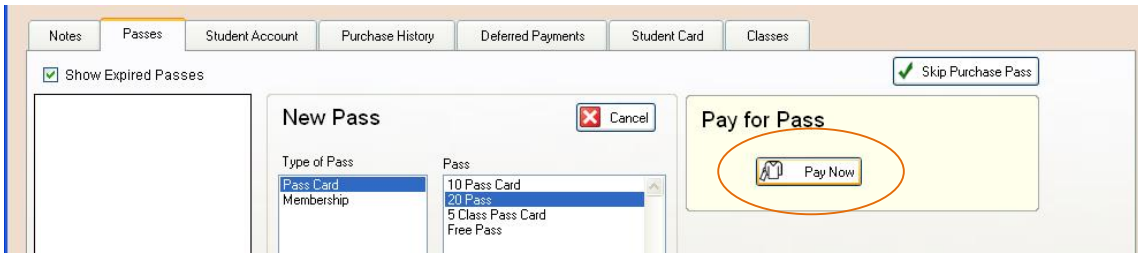
3. On the New Pass form, from *Type of Pass* choose either *Pass Card* or *Membership* (these must have been set up previously either through the setup wizard or via the Administration area).



4. From the menu to the right, choose the desired pass.

5. The form will expand to allow the student to “Pay Now²”.

¹ See step 5 in this Tutorial

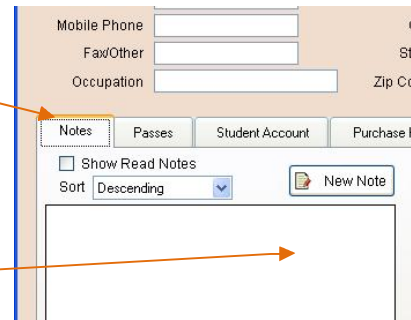


Step 4: Add a Note

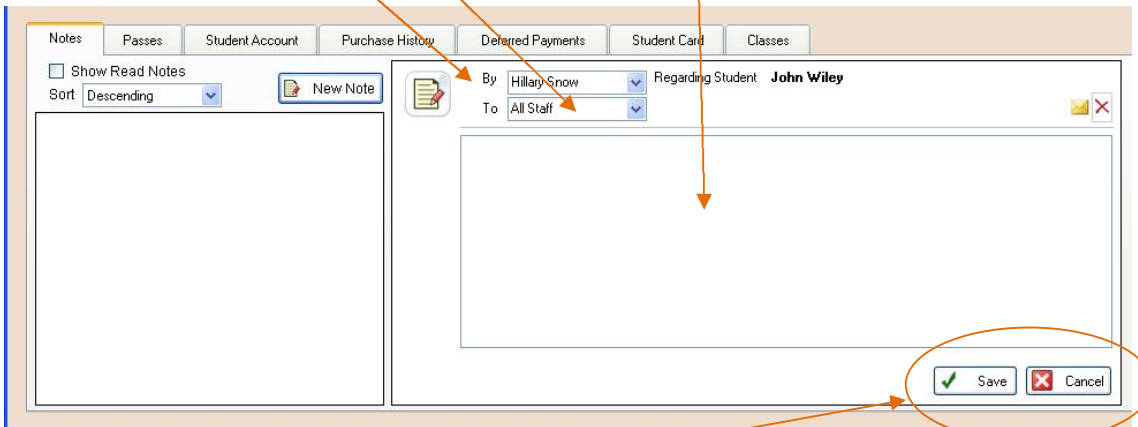
1. Click on the *Notes* tab.

Notes can be sorted by the order they were sent in either descending or ascending order. Showing *Read Notes* allows you to choose the option of displaying previously displayed notes.

2. Click on “New Note” to enter a new note about this student.



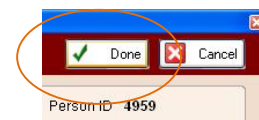
3. Select who the note is *By* and *To* and write your note in the box.



4. Choose “Save” or “Cancel.”

Step 5: Save the New Student Record

To save the information, click “Done” in the top right corner.



² See tutorial 9 for information about retail or tutorial 2 for information on how to set up your pass cards & memberships.

Step 6: Open the New Student Form from a Class or Workshop

There are two ways to get to a new student form—by adding a student to a specific class or adding a student without specifying a class.

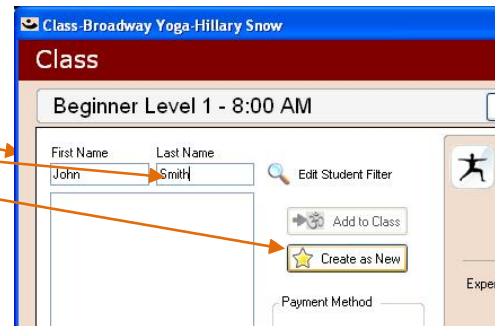
To add a student to a class.

1. From the classes listed, click on the class to which you would like to add a student.

2. Enter the

- First Name
- Last Name; then
- Click on “Create as New”.

See Step 2 above for details on how to enter the student’s information on the New Student form.



The screenshot shows a web interface for a class titled "Class - Broadway Yoga - Hillary Snow". Below the title is a red header with the word "Class". Underneath, the class name "Beginner Level 1 - 8:00 AM" is displayed. There are two input fields for "First Name" and "Last Name". The "First Name" field contains "John" and the "Last Name" field contains "Smith". To the right of these fields is a search icon and the text "Edit Student Filter". Below the input fields are two buttons: "Add to Class" and "Create as New". The "Create as New" button is highlighted with a yellow star icon. Below the buttons is a "Payment Method" field. On the right side of the interface, there is a vertical sidebar with a star icon and the word "Experi".