



Start Up Checklist

STEPS FOR SUCCESSFUL SET UP

CLICK ON THE ? FOR STEP-BY-STEP INSTRUCTIONS

For more great instructions and links go to our [Getting Started Page](#).

Note: Help Center articles may reference the classic menu for the time being.

Please [click here](#) to see the changes from the Classic to Simplified Menu.

- ☐ QuickStart Wizard completed.
- ☐ Set up ePayments. ?
- ☐ Booked my 1st Jumpstart call to work with my own coach. ?
- ☐ Reviewed and updated the Gear(icon)>Settings>General page as needed. ?
- ☐ Review and edit left hand menu found under the Gear(icon)>Settings>General.
- ☐ Updated my drop down lists to reflect my business filters and options. ?
- ☐ Set up Tuition Settings - billing methods, discounting and prorating. ?
- ☐ Add all staff to database - Staff (menu)>Add Staff.
- ☐ Assign User Ids to those staff who will require admin access to the database. ?
- ☐ Add or import my classes. ?
- ☐ Set up Staff Portal for instructors to access schedules/classes for attendance/skills tracking. ?
- ☐ Set up my Online Registration form: ?
 - ☐ Policies & Agreements
 - ☐ Field Options & Labels
 - ☐ Settings
- ☐ TEST MY REGISTRATION FORM ?
- ☐ Parent Portal: ?
 - ☐ Landing page message
 - ☐ Settings
- ☐ TEST MY PARENT PORTAL ?
 - ☐ Class listing tables for my website. ?
- ☐ _____
- ☐ _____
- ☐ _____

Let's Get
Ready to Go!