
















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](#).

- 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!