



Customers User Guide ~ Student Profile

Getting Started:

Logging in: To log into the software, use any internet browser and go to www.optimams.net. At the top right of the page, click on "Customer Client Log in" and then use the provided username and password.

Help and Support: Help videos are available in a support section of our website. To view videos when logged in, click "Help/Support" on the left of the Home page in our Customer Program. If you need additional assistance, please contact Jeff Sgarlata at:

- Call 315-727-3952
- Email jsgarlata@optimams.net

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- Student: To access the student profile section of the software, click "Students" on the left side of the home page. You can either "Add New Student" or view an existing one. To view an existing student, you can either type the student last name into the search box on the left or select the student from the list in the "Students" grid.
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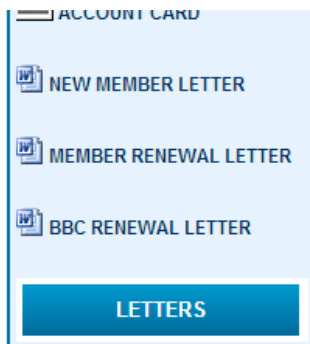
Student Details:

- **Details:**
 - **All the fields and their purpose throughout the program:**
 - Many of the fields are not mandatory fields due the reason that our software can be used for tracking leads and other contact information.
 - Most of the fields at the top are self-explanatory. However, here are some tips that may help you understand their use:
 - Middle Name: Can be used for middle name or initial. Many dojos use middle initials on rank certificates.
 - Status: The list would be populated from within your school set up in the school profile section. Many schools create statuses for various mailing lists. For example, if we wanted to add all our contacts for our local elementary schools in our area, we may add a status called "Schools". This would then allow us to pull up lists based on that status.
 - Input Date: Will automatically generate today's date however can be changed if needed.
 - Account Number: You can either manually enter the student account number or to get the next chronological number, select "Get Next Account #". Only students that are "Active Members" or "Former Customers" need to have an Account number assigned to them. If changing an account number is ever needed, please note that all attendance data will be lost.
 - Original Start Date: The date the student first enrolled.
 - Former Customer Date: Only use this field when a student stops training. Enter the date when the student is no longer considered an "Active Member". Some dojos consider a student a former student

when they stop making payments while other dojos may use the last date trained. Using this field will allow the user to create reports to view students that stopped training during a certain period of time.

- Termination Reason: Use this field only when a student stops training. Enter the reason why they stopped. This will allow user to create reports and view why students are not continuing with their training.
- Address Needs Update: This checkbox is used when the address for this student is no longer good. This allows the user to create mailing list for “good” addresses only and not send mail to undeliverable addresses.
- Address 2: Used mainly for apartment or suite numbers of a mailing address.
- Phone Numbers: All phone number fields will allow user to also type in a few text characters for “labeling” the number. For example, if you want to label a number with text. Our software allows an entry like
- Mom (123)456-7890.
- Sponsor Info and Source: The best way to use these fields is to use the “Source” as a main area and sponsor as the details. For example, if a student comes in from a birthday party for John Smith, you would enter John Smith under sponsor info and birthday party under source. Sources can only be added to the drop down list in the “School Profile” section of the software.
- Birthday Call and 2-4-6 week calls: in most cases, you would not enter the information in these fields here. However that is an option. When using these fields, enter the date when the call or contact was completed. Do not enter the date you wish to call/contact. Call lists are generated automatically for staff members to use instead of needing to search or remember each student manually.
 - Birthday Call: Enter the date the call was complete. The student will be removed from the Birthday Call List (under “Call Lists” on the left of the home page), until the following year. This is a great way to contact your students to wish them a happy birthday each year.
 - 2-4-6 Week Calls: Enter the date the call was complete. Calls that are due will be displayed in the “Call List” on the left side of the home page.
 - 2 Week call is automatically calculated 2 weeks after “Original Start Date”.
 - 4 Week Call will be automatically calculated 2 weeks after the completion of the 2 week call
 - 6 Week Call will be automatically calculated 2 weeks after the completion of the 4 week call.
- Custom Text and Date fields will appear at the bottom of the student details page.

- **Email Link:**
 - If your email settings are configured, a user can email the student directly from within the program. Users have the option to store a record of email in the student contact log. See Contact Log below for more information.
- **Printing envelopes addressed to students:**
 - Our software allows users to print our pre-addressed envelopes for students. The envelopes will get addressed to the student and not the parent (we are working on a parent option currently). The envelope must be a #10 (standard business size) envelope.
- **Printing attendance cards:**
 - For the dojos that use an attendance card for each student. Due to attendance cards being different for dojos. We can create the attendance card to your specifications: size, fields, and layout. Please contact us for information regarding attendance cards creation.
- **Printing ID Badges:**
 - For the dojos that use an ID Badge for each student. Due to the variations needed for different dojos, we can create the ID badges to your specifications: size, fields, and layout. Please contact us for information this feature.
- **Printing Account Cards:**
 - For the dojos that like to keep a student account card for recording payments and other student related information. Due to the variations needed for different dojos, we can create the Account Cards to your specifications: size, fields, and layout. Please contact us for information this feature.
- **Custom Letters for students:**
 - At this time of this manual, there are 2 options for custom letters to students
 - Option 1: To create the custom letters in the School Profile to use with these links: New Member Letter, Member Renewal Letter and BBC Renewal Letter. These templates were in version 1 of our software and will be removed within a few months.



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- Option 2: Create custom letters to be used with the “Letters” box (in above photo). This features allows users to insert more fields and create/name the letters easier and more efficiently. Please see our “Creating Custom Letters” user manuals or videos.

- **Programs:**

- **How to add a New Student Program:**

- To add a student program into the software, access the student page by either typing last name into search box or by selecting student from student grid in “Students” link off home page.
- Select the “Programs” tab in the center of the page.
- Select “Add New Record”
- Enter in the information and click “Save”. See below with explanation of fields.

- **Field explanation:**

- **Program Account Number:** We recommend using the student Account Number on the “Details” page plus a “.1”, “.2” etc. For example. A student with the Student Account Number of 72 would have a Program Account Number of 72.1 for their 1st program, 72.2 for their 2nd program and a 72.3 for their program. This would continue for all the student programs. Our software allows you to keep track of all the student programs without needing to cancel one and re-enter a new one. The different Program Account Numbers will allow users to see which programs are active while seeing any payments related to that particular program.
- **Program Type:** This list is populated from the setup of “Program Types” in the school profile. Please see “School Profile – Program Types” for more information.
- **Enrollment Types:** This list is populated from the setup of “Enrollment Types” in the school profile. Please see “School Profile – Enrollment Types” for more information.
- **Payment Types:** The payment structure for that particular payment.
 - **Monthly:** Student will be making consecutive monthly payments
 - **Quick Pay:** Many dojos offer a discount if a student pays the program off faster. Example: a student enrolls in a 12 month program but agrees to pay it off in 6 payments.
 - **PIF:** Paid in full. Student agrees to pay off program and have no monthly payments
 - **Gift Certificate:** Student is training on a FREE Program
 - **Time Transfer:** Student is training on this program with time that might be credited from another student’s program. Example: Sibling #1 may take time from sibling #2 that stopped training. Payments on sibling #2 have been already paid but the dojos is offer “credit” time.
 - **Active checkbox:** This checkbox is used to track the current program that the student is enrolled on. By checking or unchecking this box will have no effect of payments due. A checked “Active” box will make this program appear on reports like a renewal list and others. Example: A student has their first program with dates starting 1/1/15 and ending 7/1/15. But

then enrolls into an advance training program in 3/1/15, that will begin 7/1/15. They enrolled early for the advance training benefits. The “Active” box would be unchecked on the first program and checked on the second program. If the “Active” box remained checked. This program would appear on any renewal list for the dates including 7/1/15. By unchecking the box, the program knows that another program is in place.

- Number of Payments and Payment Amount: These fields are for payments that are going to be done monthly through a billing service. Do not enter any payments here that are expected to be paid at the dojo.
- Deposit Amount: Use this field for all money to be paid at the dojo whether it's for an initial payment (down payment) or for a paid in full program.
- Date Signed: This date is used on reports for contracts signed. We recommend using the date you use to when counting this contract in your statistics. We recommend using the date actually signed.
- Program Start Date and Program End Date: The dates the program starts and actually ends.
- First Payment Due Date: The date the first monthly payment is due to begin.
- Notes: Any information regarding this program should be entered here. We like to use this field for when any deposits are going to be paid. Information entered here will appear on an “Outstanding Deposit” report.
- Click “Save” when complete

- **Payments:**

- **The Payments tab:**

- All recorded payments for a student will be recorded on this page. These payments will only be for payments made on their enrollment programs and will not display any payments for retail. Except for auto payments using our automatic billing feature, all payments will need to be manually entered to be recorded.

- **How to record a payment:** If you are using our automated billing feature and need to record a payment to replace an automatic payment, please see our help manual for our Automatic Billing.

- From the student profile page, select the payment tab.
- In the empty line for adding payments, select the payment type from the drop down list. See the next section for payment type explanations.
- Then select payment type, amount, program account number, date and if needed, enter notes in comment section.
 - NOTE: if recording a refund, a negative payment amount is required. Example, you would need to enter -129.00 to record a refund of 129.00.

- NOTE: only program account number will be displayed for any programs that have a balance due according to the payment type. Example, if you are recording a “Deposit” on a program and the student has a current program and another program that has been paid, only the current program that has a deposit balance will be displayed to be selected under “program account number”.
 - Once all needed fields are filled, click “Add” on the left side of the data line you are working on.
- **Payment Types used for payments on programs:** Any payment that is expected to be paid thru a billing service or over time (Example: Monthly payments) would be considered “Program Contract”. Any payments that are expected to be paid at your dojo (Example: Initial Payments, down payments, paid in full) would be considered “Program Deposit”.
 - Program Contract Billing Service: Use this type when entering payments that have been received from a billing service other than Optima’s automated billing service. If a lot of payments are to be entered, payments can be added on a group page under “Payments” on the left side of the page.
 - Program Contract Credit: Use a credit when a payment has been credited but not actually received. For example, if you offer a free month to students who refer a new member, you can record that free month as a credit.
 - Program Contract In-House: This type is used when an expected auto payment from a billing service is paid at the dojo instead of thru the billing service. Example, a student who comes in dojo to make a payment on their program because they received tax returns and wants to pay ahead on their program.
 - Program Contract Refund: Use refund to record a payment that was refunded. Example, a student who may have been double billed due to data entry mistake. Remember to enter refund with a “-” preceding the dollar amount.
 - Program Deposit: When a student has an initial payment due or is paying in full, record the payment using this type.
 - Program Deposit Credit: Use a credit for Program Deposit when you are applying a payment that you actually did not receive. Example, a student agrees to paint your dojo for a credit on their program. You want to show a payment (credit) that is was paid, but you never actually received the money.
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