



Customers User Guide ~ School 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 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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Setting up your school profile:

- **Profile:** Before you begin using your software please take the time to confirm your school’s information and to enter any missing information as well. Only administrators of the dojo will have access to this area of the software. The following sections are all associated with the “School Profile”. To access the school profile, click “School Profile” on the left of the page. The school (dojo) profile is the general information for the dojo. The logo, dojo name and address will appear on invoices. The name, email address and phone numbers are typically used for contact from Optima support. The custom text and date fields can be created and used on a student profile and can be used to create various reports and filters. An example of a custom field may be an "Anniversary Date" used to remind staff when a student on auto renewal is due to continue or discontinue their training. This date can be put into filters to create reports of whose “Anniversary Date” are coming due. Another example of a custom field may be: "Association Number". For those schools that are part on a bigger association, it is important to track the students' Association Number for various reports. This will allow user to enter the Association Number for that particular student.
 - **Edit/Update your dojo information:**
 - HOW TO: Once in “School Profile”, you will see multiple tabs across the center of the page. The first tab is “Profile” and in here you can edit/update your profile information. Please confirm the information that is entered and add any missing information as well. When finished making corrections, click “Save Changes”.
 - **Adding your logo to the software:**
 - HOW TO: If you have a logo already uploaded, it will be displayed in the top left section of this “Profile” tab. If no logo has been uploaded yet, a grey box with “No Photo

available” will be displayed. To upload or change your logo, click “choose file”

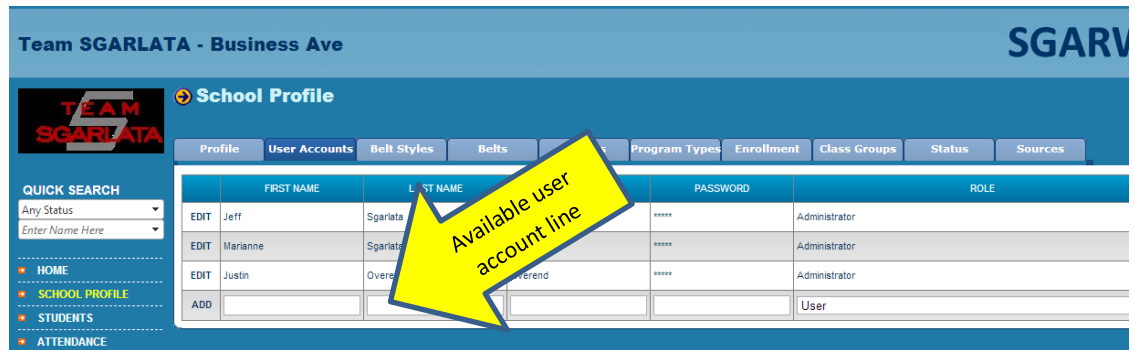
- Find your logo on your computer and select file and click “Open”.
- Click “upload photo” to have it displayed in the preview pane.
- If satisfied with the logo, click “Save Changes”. Your logo will now be displayed on your screen in the upper left corner. You may have to refresh the page before the logo is displayed.
- **Creating Custom Fields:**
 - Optima Software gives the user an opportunity to create up to 5 custom text fields and 2 custom date fields to be used in the student profile section. You have the ability to name the fields as you wish. It’s recommended to use the text fields for text and numbers, and the date fields for any date related entries.
 - HOW TO: On the “Profile” tab, scroll down to see the “Custom Fields” section (see diagram below).

Type the name of the field as you would like it to appear on the student detail page. Check the box “Use custom field?” then click “Save Changes”. The new custom field will appear on the student detail section at the bottom of the page.

User Accounts: To access the user accounts, click “School Profile” on the left of the screen. Then select the “User Accounts” tab in the center of the page and proceed to create, edit or delete an account. By default, OMS allows to you set up 8 usernames and passwords on our Basic and Standard Packages. All administrators of the program will have access to this feature; however at no time will anyone be able to see passwords for any user. Even OMS employees and developers do not have access to passwords. If a password is forgotten, a new password must be assigned by the administrators.

- **To create a new username and password:**

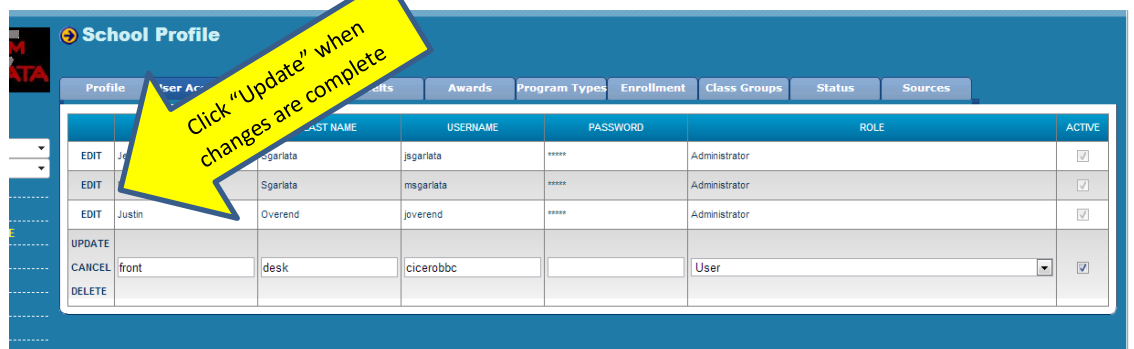
- HOW TO: Once in the “User Account” section type account information into the available (empty) user account line.



- When setting up users, you have the choice of 3 "roles" for each user. "Administrator" will give them full access to the software. Admins have control over the school profile, belt styles, users and all set up information including the "Retail Admin Pages. The "Billing" role gives access to everything excluding the "School Profile" and "Retail Admin". A billing role will have access to automatic billing features, reports and alerts. Lastly, the "User" role will not have any access to "School Profile", "Retail Admin" or any billing information. When entering a new user, you can also select if they are an "Instructor", which will add their name to the "Scheduler". The "Instructor" check box has no other impact through the software except adding the name to the "Scheduler" drop down list. You will not be able to delete a user if they are used within the "Scheduler".

- **To edit an existing user:**

- HOW TO: Select “Edit” next to the user account in which you want to make changes. You will not need to re-enter a password in order to save any changes. A password is only required when creating a new account or changing a password of an existing account. Make any changes necessary and click “Update” to the left of the “First Name” field.



To cancel changes made without saving them, click “Cancel”.

- **To delete or disable user accounts:**

- HOW TO: Once in “Edit” mode of a user account, click “Delete” to totally remove that account. Once an account is deleted, it can not be undone. You will need to re-create that account to use it again. To simply disable the account, uncheck the “Active” box on the far right side of that user account, then click “Update”. If a user is used in the “Scheduler”, you will not be able to delete the user account, only deactivate it.

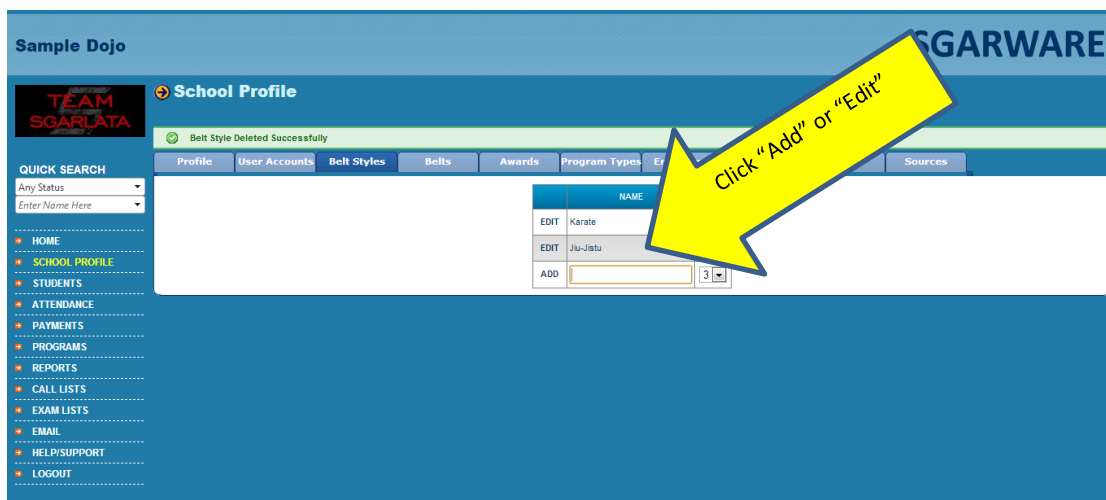
- **Belt Styles:** The “Belt Styles” tab allows you to set up the belt styles taught at your Dojo. Examples: Karate, Jiu Jitsu, Muay Thai, etc. “Belt Styles” should be a list of the different styles of belts that your students can achieve. Example: Many dojos allow their students to earn one belt in karate, while also earning another belt in Jiu-Jitsu. This results in one student having 2 (or more) different belts and testing goals. For this example, “Belt Styles” would need to have at least “Karate” and “Jiu-Jitsu” listed. A user will also be able to enter attendance for all the different styles as well and our software will keep track of attendance for the students in each style. A note of caution: If you offer many different styles but only a few different belt structures, you may want group some of the styles together under one style to eliminate some "over crowding" and confusion on some reports.

- **To add Belt Styles:**

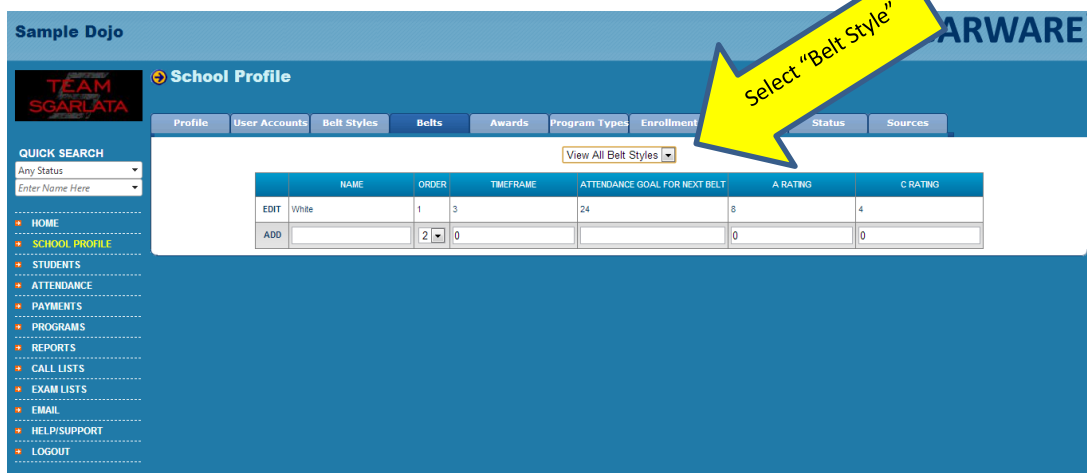
- HOW TO: Select Belt Style tab in the School Profile. Enter style of belt in the box and click “Add”. The “Order” is the chronological listing for many reports. This will result in the reports listing the belt styles in the preferred order instead of alphabetically.

- **To edit a Belt Style:**

- HOW TO: Once a Belt Style has been added you may edit it by clicking on “Edit” to the left of the name box. You may either make changes and “Update” the belt style name or click “Delete” to remove the information entirely.
- NOTE: You can only delete a “Belt Style” if no student has been assigned to that style. Please contact our support department for assistance with deleting “Belt Style”.



- **Belts** The “Belts” tab allows you to set up the belt structure for each style and the requirements that need to be met in order to advance to the next belt level. Optima also has the ability to count classes at each belt level and to grade the student attendance for the last 4 weeks based on the criteria set in the software. By default, these features are turned off to avoid “clutter” on the screen. If one or both of these features are needed, please contact us to “activate” them. The “Order” column represents the order in which the belts will be listed on reports and the chronological order for belt advancement. Belts within the same style should not have the same “Order” number and should not skip a number.



- **To add Belts:** You must first choose the “Style” of belt from the drop down menu prior to entering belts. See photo above. (Example: Karate, Jiu Jitsu, etc.)
 - HOW TO: Enter the “Name” of the belt, and the “Time Frame” in months required for this belt. If you have the Attendance Tracking and ABC rating feature activated through OMS, the following also need to be entered: The “Attendance Goal for Next Belt” is the number of classes needed at that belt to be eligible to advance to the next level. “A” Rating and “C” Rating will automatically rate students’ attendance for that style for the past 4 weeks based on the numbers that are entered here.
 - “A” Rating: Enter the number for which your dojo considers a student to be “A” rated in the last 4 weeks for that belt level. For example: If your dojo considers training 2 times per week an “A” attendance rating for a white belt, then enter 8 into the box (2 x 4 weeks). This will result in any student at this level with 8 classes or more in the past 4 weeks as an “A” rating.
 - “C” Rating: Enter the number for which your dojo considers a student to be “C” rated in the last 4 weeks for that belt level. For example: If your dojo considers training 1 time per week a “C” attendance rating then enter 4 (1 x 4 weeks) into the box. When finished click “Add” to the left of the “Name” box. This will result in any student with 4 classes or less in the past 4 weeks as a “C” rating.
 - “B” Rating: This will automatically calculate using the “A” and “C” ratings numbers. So using the above examples (“A” and “C” rating) any student who attends 5-7 classes in the past 4 weeks will earn a “B” rating.
- **To edit Belts:**
 - HOW TO: Once a Belt has been added you may edit it by clicking on “Edit” to the left of the name box. You may either make changes and “Update” the Belt name or click “Delete” to remove the information entirely.
 - NOTE: You can only delete a “Belt” if no student has been assigned to that belt. Please contact our support department for assistance with deleting a “Belt”.
 - NOTE: If you change the name of the “Belt” it will reflect that change automatically to every student assigned that belt.

Awards: The “Awards” tab allows you to set up the any awards to be given to your students. (ex: demo patch, instructor patch, student of the month, etc.)

- **To add Awards:**
 - HOW TO: In the “Name” box enter the name of the award and select “Add”.
- **To edit Awards:**
 - HOW TO: Once an “Award” has been added you may edit it by clicking on “Edit” to the left of the name box. You may either make changes and “Update” the award name or click “Delete” to remove the information entirely.
 - NOTE: You can only delete an “Award” if no student has been assigned that award. Please contact our support department for assistance with deleting an “Award”.

Program Type: The “Program Type” tab allows you to set up the different types of programs that your students enroll into (ex: 6 Month Basic Program, One year Black Belt Program, etc:). The length and time that someone would enroll on. Examples of program types are: 1 month basic, 3 month basic, 6 month BBC, 6 month Elite, 1 year BBC, etc. At our dojo, we have a student enroll in our quick start program which is either a 6 Week Basic or 6 Week Elite. After the quick start, a student would then enroll in either a 1 Year Basic or a 1 Year Elite.

- **To add Program Types:**
 - HOW TO: Click on “Program Type” tab. Enter name of program in box and click “Add”.
- **To edit Program Types:**
 - HOW TO: Once a “Program Type” has been added you may edit it by clicking on “Edit” to the left of the name box. You may make changes and “Update” the program type or click “Delete” to remove the information entirely.
 - NOTE: You can only delete a “Program Type” if no student has been assigned that type of program. Please contact our support department for assistance with deleting “Program Type”.

- **Enrollment:** The “Enrollment” tab allows you to set up the type of enrollments. (Example: New Member, Renewal, VIP, etc.) Different reports are available based on the enrollment classifications. We don’t consider someone a “New Member” until they have made a financial commitment. For example, if someone won/received a free program, their enrollment would be considered as a “VIP Trial”. Our VIP Trials are usually 1-2 weeks of classes. Then if they continue, they would be considered a “New Member” and enroll in either a Basic or Elite Quick Start program. Once they complete the Quick Start, they would then enroll into a longer term program and would be classified as a “Renewal” from that point forward.

- **To add Enrollment:**
 - HOW TO: Click on “Enrollment” tab. Enter type of enrollment in box and click “Add”.
- **To edit Enrollment Types:**

- HOW TO: Once an “Enrollment” type has been added you may edit it by clicking on “Edit” to the left of the name box. You may make changes and then click “Update” or click “Delete” to remove the information entirely.
- NOTE: You can only delete an “Enrollment” if no student has been assigned that type. Please contact our support department for assistance with deleting “Enrollment”.

Class Groups: The “Class Groups” tab allows you to set up the different groups for students. Example: Adults, Juniors, Little Champions, etc.

- **To add Class Group:**
 - HOW TO: Click on the “Class Group” tab. In the name box enter the name of the class and click “Add”.
- **To edit Class Group:**
 - HOW TO: Once the Class Group has been entered you may edit it by clicking on “Edit” to the left of the name box. You may make changes and click “Update” or click “Delete” to remove the information entirely.
 - NOTE: You can only delete a “Class Group” if no student has been assigned that group. Please contact our support department for assistance with deleting a “Class Group”.

Status: The “Status” tab allows you to set up the status of the contact within your database. (Example” Active Member, Lead/Prospect, Former Customer, etc.). Use “status” for various types of “Contacts” within OMS. For example you may create a “Status” as “Teacher/Principle” if you wish to create a database that would store their information for mailouts, emails, etc. Active Member, Lead/Prospect and Former Customer are standard fields and cannot be changed or deleted.

- **To add Status:**
 - HOW TO: Click on the “Status” tab. In the name box enter the status and click “Add”.
- **To edit a Status:**
 - HOW TO: Once a “Status” has been entered you may edit it by clicking on “Edit” to the left of the name box. You may make changes and click “Update” or click “Delete” to remove the information entirely.
 - NOTE: You can only delete a “Status” if no contact has been assigned to that status. Please contact our support department for assistance with deleting a “Status”.
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Sources: The “Sources” tab allows you to set up the sources of leads and new members.

- **To add Source:**
 - HOW TO: Click on the “Source” tab. Click on “Add New Record”. In the name box enter the source name and click “Add”.

- TIP: To avoid storing 100's of sources that, overtime, are not current or active, it is recommended that you use the "Source" as a generic category and then "Sponsor Name" as the specific detail. For example: if you create a "Birthday Party" source, you can add the birthday student's name in the sponsor name box on the student profile instead of needing several "Birthday Party" sources for each birthday party.
- **To edit a Source:**
 - HOW TO: Once a "Source" has been entered you may edit it by clicking on "Edit" to the left of the name box. You may make changes and click "Update" or click "Delete" to remove the information entirely.
 - NOTE: You can only delete a "Source" if no contact has been assigned to that source. Please contact our support department for assistance with deleting "Sources".