Enrollware Class Scheduling Quick Start Guide

Welcome to Enrollware! We've put together this short guide to help you get started scheduling classes, accepting registrations, managing rosters and printing your certification cards or certificates. If you ever run into any difficulties or questions, please don't hesitate to send an email to **support@enrollware.com**.

Logging In

At this point, you should have received your initial username and password information in an email. To begin, open a web browser to www.enrollware.com and click the **Client Login** at the top right of the home page. That will take you to a login screen where you can enter your username and password. After successfully logging in, you'll be taken to your admin home page. It's recommended at this point to click on **My Account**, verify your information, and change your password.

Initial Setup

Before the first class can be scheduled, a few initial setup steps must be taken. Once these are setup, you'll probably not need to visit these screens very often but they will be available to edit and make changes any time you'd like.

1. **Course Types** – Before classes can be scheduled, at least one course type must be configured. Under the **Settings** menu item, choose **Course Types** and then click the **New Course Type** button at the top right. Fill in the form, select any product add-ons and enter shipping fees, if shippable, and click **Update Course Type.**
2. **Locations** – At least one training location needs to be configured. Under the **Settings** menu item, choose **Locations** and then click the **New Location** button at the top right. Fill in the form and click **Update Locations.**
3. **Card Settings** – The training site/center information that is printed on each card is configured on this page. Access it under the **Settings** menu item by selecting **Card Settings.** Complete the form and click **Update Settings.**
4. **Instructors** – At least one instructor must be configured in the system. By default, the main administrator account is also set as an instructor, but you will no doubt need to add more. To do so, select **Users** under the **Settings** menu item, and click the **Add User** button. Choose a username and password for the instructor, fill in the information on the form and click the **Update User** button to save the information. Make sure to the check the appropriate role(s) for the user, **Admin**, **instructor** and/or **instructor-assistant** role. Users with **instructor** and/or **instructor-assistant** roles may log into the system and schedule classes create rosters etc., but are not allowed to create other users. You may restrict your instructor's views to only view

classes they are scheduled to instruct and or unassigned classes. To restrict your instructor's view, navigate to you **Settings – Site Settings** and check the appropriate options box.

5. **Selling Add-On Products** – If you plan on selling textbooks or other class related products to class registrants, you may add these by navigating to Settings – Product Add-ons. Simply click **New Add-on** to enter the product information and check off appropriate **Options**.

Site Settings

The **Site Settings** screen can be accessed under the **Settings** main menu selection. Here you set various aspects about your training site and registration page, including contact information, registration terms and conditions, your EnrollwarePay Merchant ID, custom registration questions, and much more.

Registration Page Customization

Schedule Page Text and the Custom Sidebar allow you to customize your registration pages with a logo, hyperlinks, SEO content, images and other custom content to personalize and brand your Enrollware pages to your business. You may optionally also set a different contact us email address to be displayed on those pages. To change your Contact Us email, navigate to your **Settings – Site Settings**, scroll down to "Contact Us" Email Address and enter your desired email address.

Registration Link

At the top of the Registration Settings section, your registration link is displayed. This is the URL that you should use any time you link into the Enrollware registration system from your site. Based on your preference, you may also use the additional registration links found in your **Site Settings**.

Scheduling Classes

OK, the hard part is out of the way. Now to schedule your first class, simply navigate to your home admin screen (or **Classes and Students ->Upcoming Classes**) and click the **Schedule a Class** button. That will take you to a short form where the specific class information is entered. You can go back and edit the class at any time to make change.

After the class is created, students can be added either manually or through the online registration process. You may manually enter students from the class edit screen by clicking the **Add Student** button and filling in the information or the **Registration** button, which you may use to enter a student to the class with a credit card payment. If the class has not yet been held, the status and test score fields may be left blank and filled in later for all students by clicking the **Edit Scores** button under the student list. Students that register themselves via the registration page will automatically show up in this section.

Once the class is held, and all the student information and scores are entered, click the **Finalize Roster** button, which then is renamed to **View Roster**. From there you can view, print, or email the class roster.

Issuing Ecards

Clicking "**Print Cards**" on the class edit screen will navigate you to the eCard Export page, which is used to produce a file for import into your training organization's eCard system. There will be columns with the students First Name, Last Name, Email, and Phone number. Click the checkbox in front of fields to choose whether you want to assign an Ecard to the student.

Assign	First Name		Last Name	Email	Phone (optional)
☐	Dan Test				

	Course Date:	08/01/2018
	File Format:	◉ AHA .xlsx
		○ AHA .csv (retired)
		○ ASHI .xls
		○ ECSI .csv

[<< Back] [Generate Import File]

Ensure the student and class information is correct.   Select the file format that corresponds to your certifying organization, then click "Generate Import File" to create the file. Upload the resulting file to the organizations card issuance system.

Refer to the My Card documentation or the AHA Instructor Network for specific instructions on how to import the files to the AHA network.   Refer to the ASHI or ECSI documentation for instructions on how to import files into those systems.

AHA Direct Connect (automated issuance of Ecards) instructions may be accessed by clicking the appropriate link below.

AHA eCard Direct Connect for Training Centers

AHA eCard Direct Connect for Training Sites

If you are interested in printing paper certification cards, click here

Additional instructions, FAQ's and Recent System Enhancements may be accessed by clicking on the **Help tab** located on the left hand side of your Admin page.