

This document will explain how to set up a Live-Stream class, will introduce the newly added features that support Live-Stream classes, and will explain what the client will experience when signing up for a class via the Client Portal.

How to Set Up Live-Stream Classes

1. Setting up a class to be a Live-Stream class is relatively simple. The setup is virtually the same as it was before, the only difference is the Class Session wizard has a new 'Live Stream' section containing a Video URL field. The presence of a URL in this field is what tells the system that the class session is a Live-Stream class session. If a class session has a Video URL, it will appear with a 'Live Stream' label in both the Advantage Suite Classes browse and the Client Portal Classes browse.
2. To set up a Live-Stream class session, navigate to the Configuration Tab, Settings option. Once there, expand the Bookings Options tree on the left hand side and select the 'Classes' option:

The screenshot shows the Advantage Suite Configuration interface. The top navigation bar includes tabs for Dev Club 5, Home, Desk, CRM, Office, Accounting, Billing, Reports, Configuration (highlighted), Utilities, and Environment. Below this is a secondary navigation bar with icons for SETTINGS, CONTRACTS, REPS, CHARGE CODES, POS SETUP, DAILY, and MONTHLY. The main content area is titled 'Program Settings' and features a search bar and a tree view of settings. The 'Bookings Options' tree is expanded, and the 'Classes' option is highlighted with a red circle. To the right, a table titled 'CLASSES' displays a list of classes with columns for NAME, DESCRIPTION, and APPOINTMENT.

NAME ↓	DESCRIPTION	APPOINTMENT
Zoga single	yoga, with a Z	Zoga
Zoga 3	ongoing, Trainer, video	Zoga
Zoga 2	ongoing, video	Zoga
Zoga 1	ongoing	Zoga
Yoga single1		Yoga
Yoga single		Yoga
yoga ongoing		Yoga
Yoga new		Yoga
Yoga Class	abc123	Yoga
TestSingleEnrollment		TestDescriptionN

3. This should load the "Classes" browse, from which you can either edit an existing class or simply add a new one. The "Classes" browse is depicted below:

CLASSES							
NAME ↓	DESCRIPTION	APPOINTMENT TYPE	ENROLLMENT TYPE	START DATE	END DATE		
Zoga 3	ongoing, Trainer, video	Zoga	Ongoing Enrollment	05/27/2020	05/29/2020	EDIT	DELETE
Zoga 2	ongoing, video	Zoga	Ongoing Enrollment	05/27/2020	05/28/2020	EDIT	DELETE
Zoga 1	ongoing	Zoga	Ongoing Enrollment	05/27/2020	05/28/2020	EDIT	DELETE
Yoga single1		Yoga	Single Enrollment	08/26/2013	09/20/2013	EDIT	DELETE
Yoga single		Yoga	Single Enrollment	08/07/2013	02/18/2018	EDIT	DELETE

- Adding/Editing a class will load the Edit Class Setup window. If adding a new class, you must enter the Name, Description, Appointment Type, and Enrollment Type then save the class before you may add any sessions to the class. Once the class is saved, the 'Add Sessions' option will appear. This Edit Class Setup window is depicted below:

EDIT CLASS SETUP SAVE CANCEL

Name
 *

Description

Appointment Type
 * +

Enrollment Type
 *

ADD SESSIONS

EDIT SESSIONS

REMOVE SESSIONS

Scheduled Sessions

Page: 1 / 0

- The 'Add Sessions' option will load the Session wizard. This is where you will find the newly added Video URL field. This can be seen below:

SESSION WIZARD SAVE CANCEL

1 Action Add new sessions of a class

2 Dates

Begins 06/02/2020 **Ends** After 1 month

Repeats Weekly **Repeat every** 1 Weeks

Days SUN MON TUE WED THU FRI SAT

3 Time

Start Time 10:00 AM **Length** 30 minutes

4 Trainers **Trainer** No Change BASIC ADVANCED

5 Locations **Location** No Change BASIC ADVANCED

6 Live Stream **Video URL**

6. You would want to enter the the URL provided by the website that is hosting the Live-Stream into the Video URL field. When entering the Video URL, be sure that you enter the exact URL provided by the website that is hosting the Live-Stream. The best way to do this is to copy the URL provided by the website that is hosting the Live-Stream and paste it into the field. Fill out the other applicable info and save the session and the setup is complete!

7. Once you have set up your class, you can navigate to the Desk Tab and select the Classes option to see how the class session appears in the browse. The session will have a “Live Stream” label underneath the session time. This is depicted below:

Dev Club 5 Home Desk CRM Office Accounting Billing Reports Configuration Utilities Environment Tom AARockwell using TrockV2 Club 5

CHECK IN EDIT INSERT RENEW SALE REFUND REGISTER SCHEDULE CLASSES TIME CLOCK

CLIENTS POINT OF SALE BOOKINGS TIME CLOCK

Class Sessions From Date 06/02/2020 To Date 06/09/2020 Club 5 - Dev Club 5

Today, Tuesday, June 2, 2020

Yoga single 12:00 PM - 12:30 PM Trainers Locations Enrolled 0 Signed In 0 Unpaid 0 VIEW 10 spots left

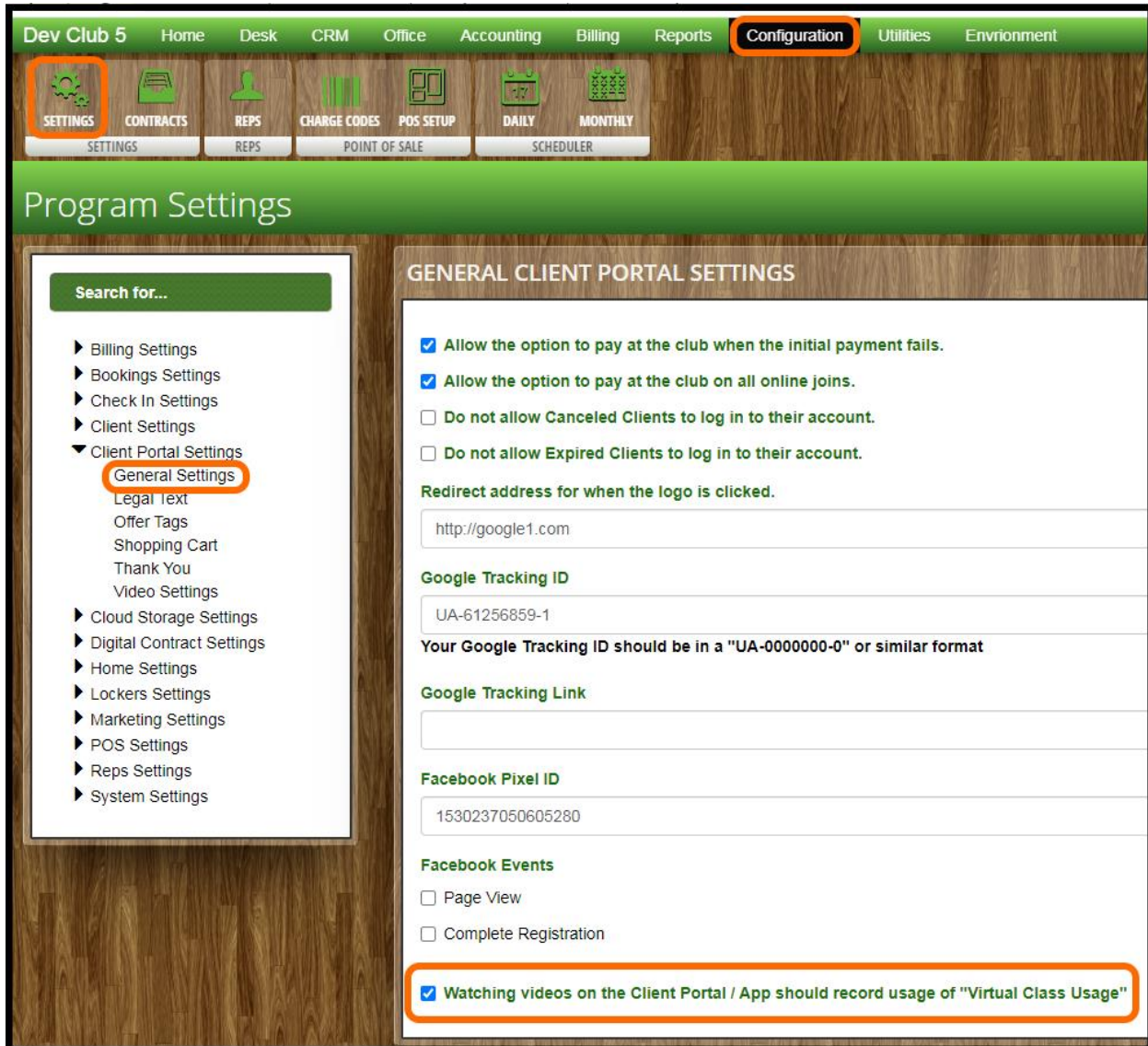
Single Enrollment Live Stream

The class session will also bear the “Live Stream” label when viewed in the Client Portal. This can be viewed further down in this document.

Additional Features for Live-Stream Classes

1. A feature was added so the club can track when a client “attends” a Live-Stream class. If this feature is on, the system will add a usage record with a usage type of ‘Virtual Class Usage’. To

turn this feature on, navigate to the Configuration tab, Settings option. Once there, expand the Client Portal Settings tree on the left side and select the General Settings option. The flag setting is depicted below:

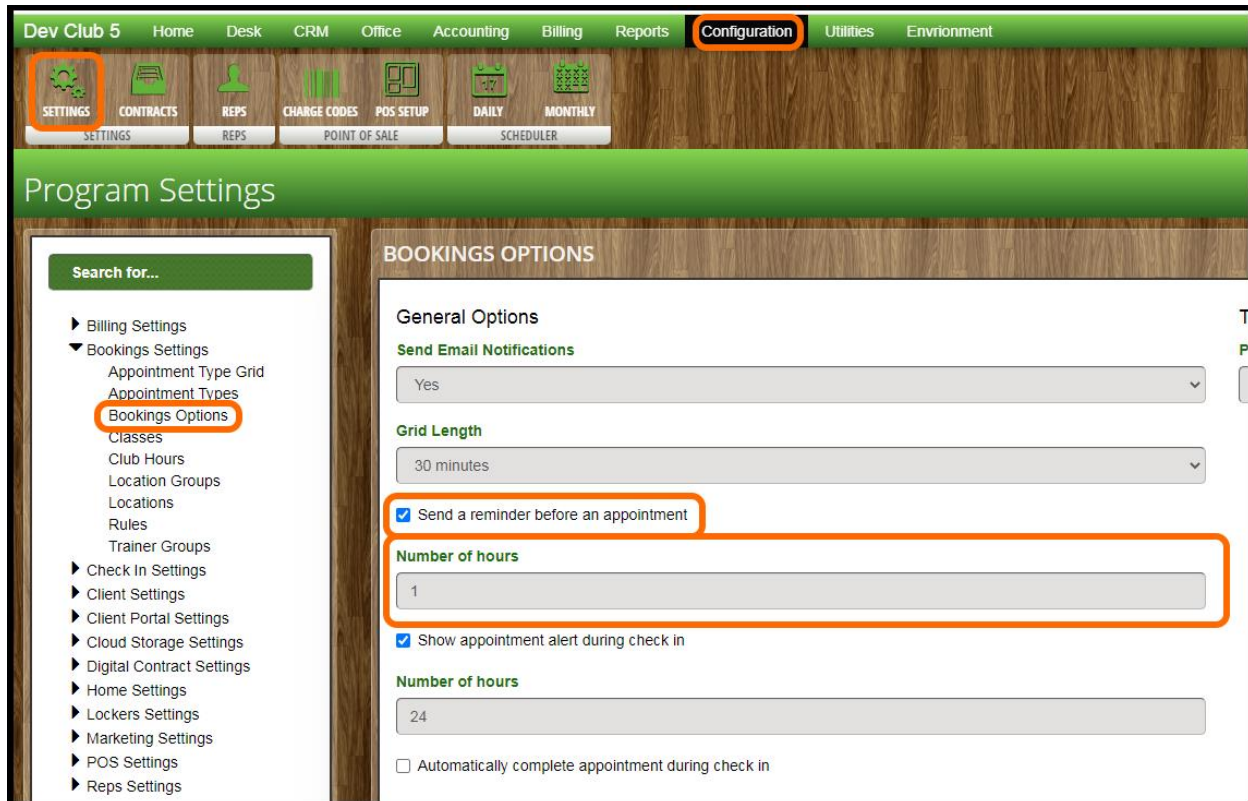


2. A new 'Video URL' token has been added to the Appointment Type email notification settings. This token will appear under the Confirmation Email, Reminder Email, and Change Email settings in the Appointment Type edit screen. When the token is included in the email template and an email is sent out, the token will act as the Video URL link of the corresponding class. You can also customize the text of the link. You can see the token in the screenshot below:

The Confirmation Email will only be sent out if the client is enrolled into the class at the physical location. This will not be sent out if they enroll via the Client Portal.

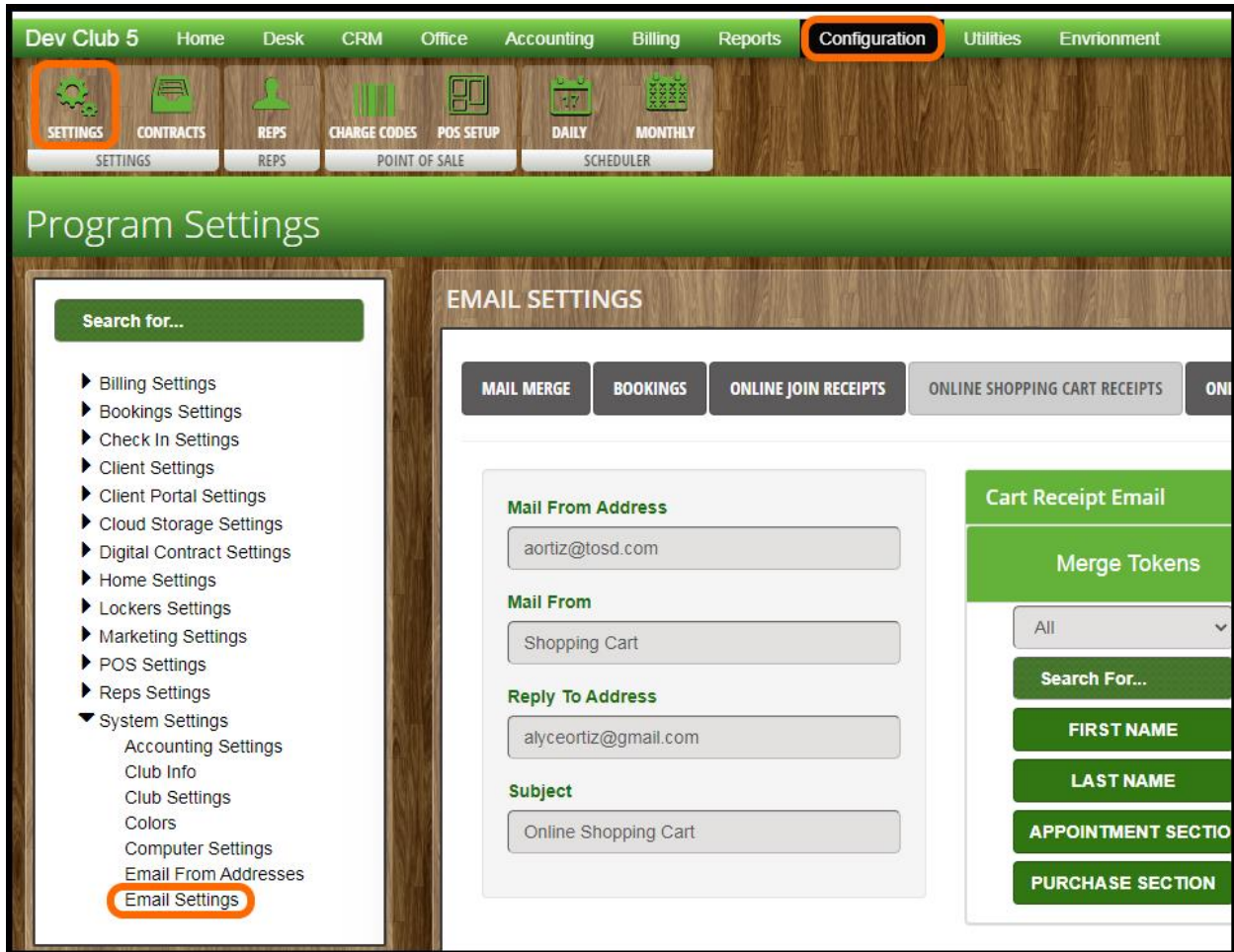
The Change Email will only be sent out if a change is made to the class session.

The Reminder Email will only be sent out if the “Send a reminder out before an appointment” setting is enabled. This is done from the Bookings Options section in the Bookings Settings tree. The checkbox must be checked and the Number of Hours field must be filled – the minimum is 1 hour. This setting is depicted below:

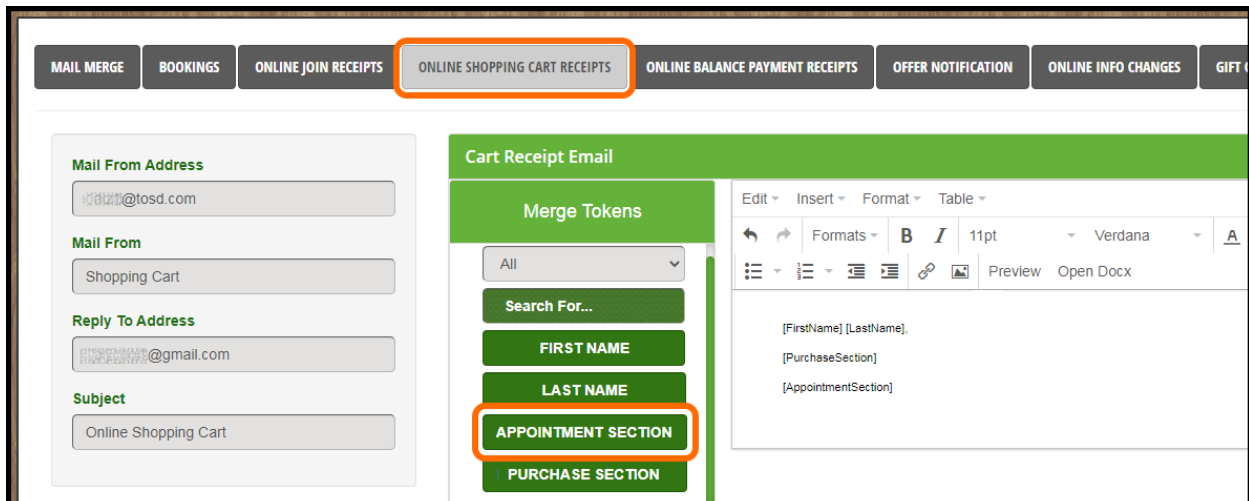


NOTE – It is strongly recommended that all three Appointment Type notification emails are set up for the Appointment Types that are being used for Live-Stream classes. This will help ensure that the client will receive the Live Stream URL link via email if they are enrolled into the Live-Stream Class in the club/clinic.

3. The 'Appointment Section' token in the Online Shopping Cart Receipts email settings has been updated to support Live-Stream classes. Nothing changed in terms of the setup of this token or the email settings, however the token itself has been updated to include the Video URL in the email receipt whenever a Live-Stream class is purchased online. It is important that this is included in your 'Cart Receipt Email' template so the client will receive the Video URL as soon as they enroll in the class. The setting for this is located under the Configuration Tab, Settings Option. Once there, expand the System Settings tree and select the Email Settings option. This is depicted below:



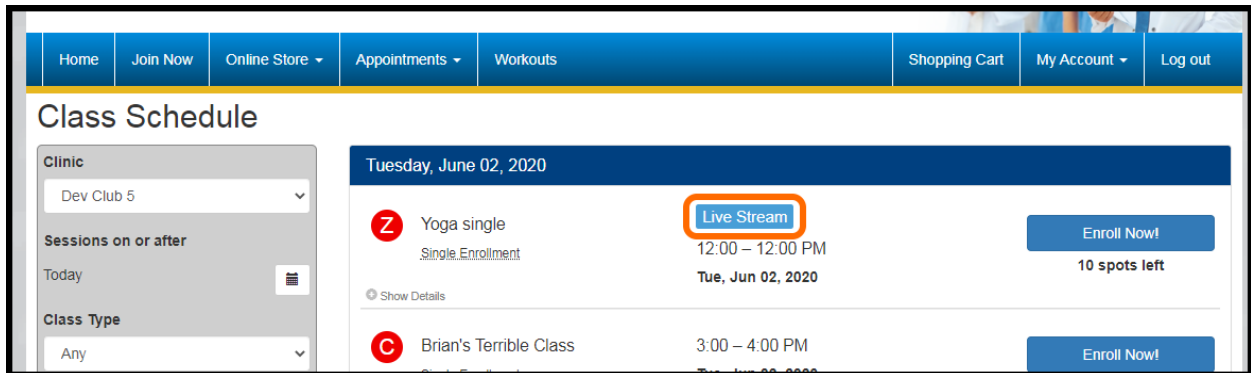
Be sure that you include the 'Appointment Section' token in the Cart Receipt Email template and save the settings. The token is depicted in the image below:



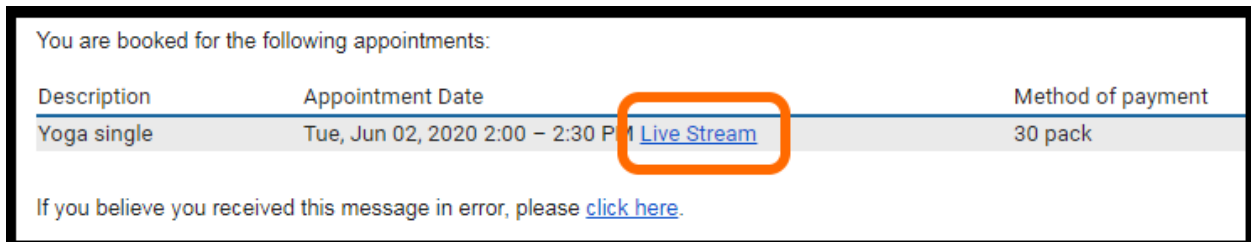
NOTE – If the ‘Appointment Section’ token is not included in the Cart Receipt Email, the client will NOT receive the Video URL link upon enrolling in a Live-Stream class via the Client Portal. They may receive the Appointment Type Reminder Email if that was set up, however it’s possible for the client to sign up after the reminder would have been sent. Therefore, it is strongly recommended that you set this up as well. If neither the Cart Receipt Email nor the Appointment Type notification emails contain the appropriate tokens, then the client will not receive the Video URL link when the sign up via the Client Portal and they will not be able to attend the virtual Live-Stream class that they had signed up for.

What the Client Will Experience

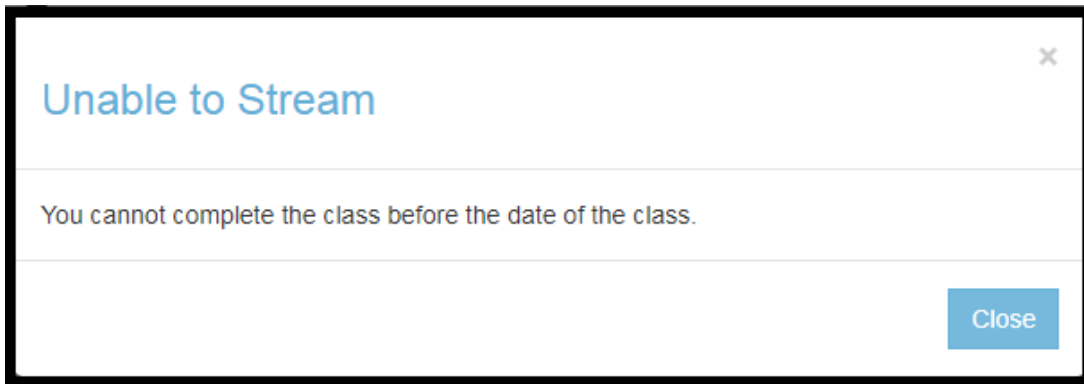
- As mentioned earlier, any Live-Stream class will appear with a “Live Stream” label when it is listed in the class browse in the client portal. This is depicted below:



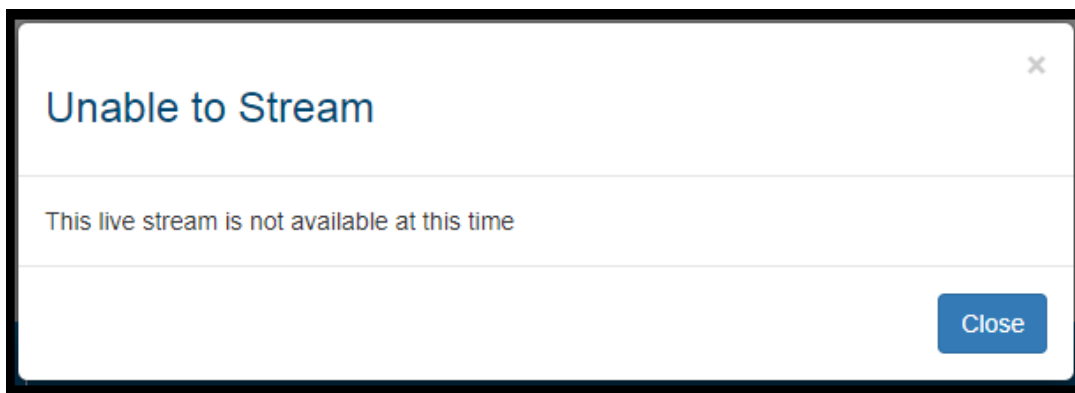
- When a client signs up for a live stream class, they will receive an email receipt containing a link to the Live Stream class as long as the club/clinic has the Cart Receipt Email template set up and is using the ‘Appointment Section’ token. An example of this is depicted below:



- As mentioned earlier, the Video URL link can also be added to the Reminder Email notification on the Appointment Type. When the Video URL link is selected, whether from the Reminder Email or the Shopping Cart Receipt Email, it will direct the client to the Client Portal where they must log in before they can view the Live-Stream. Once they log in, they will be redirected to the Live-Stream and, at that point, the session will be marked as completed.
- If the client attempts to use the Video URL link prior to the day of the class, they will receive the following message upon logging into the Client Portal:



- If the client attempts to use the Video URL link after the class is completed, they will receive the following message upon logging into the Client Portal:



- **NOTE – Twin Oaks has no connection with the 3rd party website that you choose to host your Live-Stream, so it is up to you to find a provider that suits your needs.**