Go Live Checklist!

Basic Business Settings

◯ Admin Username & Password Received via Email

◯ Bookmark Your Account URL

◯ Log in to the admin portal and personalise password

Business Information

Go to profile, account settings.

◯ Verify Correct Business Name, Owner, & Person of Contact

◯ Business Web Address

◯ Country/State/Providence

◯ Timezone/Preferred Date Format/Currency Symbol

◯ Locations

◯ Contact Information is Displayed on the Customer Portal

◯ Logo

◯ Slug

◯ Set up locations (if required)

Payments

◯ Payment gateway account/online billing set up and installed

◯ Configure Receipt Options/Business Identification

◯ Add additional content to your invoice (invoice footer in general settings)

◯ Configure Payment Types (if applicable)

◯ Set up discount options

◯ Set up level pricing

◯ Logo

◯ Xero integration (if required)

◯ Have credits been applied to customers accounts (migrated from your past system)

Setup General Settings

○ Programs

○ Charge Types

○ Tax Rates (Optional)

○ Email Templates (Automated & Custom)

○ Terms and conditions

Class Settings

○ Terms (if applicable) or perpetual (if applicable)

○ Levels

○ Add level maximums

○ Add skills

○ Set grading settings

○ Holidays Schedules (block dates for billing if applicable)

○ Set up level pricing

○ Zones/Areas/Lanes (Optional)

○ Makeup token rules (if applicable)

Now you're ready to create new classes on the Class builder!

Team

○ Create User Type permissions

○ Add staff members including teachers

○ Distribute logins to your team

Enquiry forms

○ Configuring enquiry form on your website

Data migration

Your agreed data will have been uploaded by the First Class team.

Please check the data to ensure that.

○ Class and enrolment details are correct

○ Active and inactive students are in the database

Customer/Parent Portal Settings

Set up a test parent when a test enrolment and send yourself a launch email test

Log into the portal

Set up your login and in portal messages

Set up booking instructions text (if using online bookings)

Configure your menu options in the portal

Add the portal link as a button on your website

◯ Mobile App

Other

◯ Set up self check in link (if applicable)

◯ Create QR codes for Customer Portal & App

Launch

◯ Finalise your launch email content

◯ Do a end to end to run including setting up parent and student, booking class, sending launch email to test parent and paying test invoice

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We want to ensure you are using First Class to the height of its potential. Whether you are new to any of our systems, have new personnel, or just need a refresher, our training sessions are an excellent way to maximize the successful implementation or ongoing use of our software.