

Post-Import Session Set-Up Checklist

After your sessions get imported into Ultracamp, run through this checklist to ensure all details of your sessions are set up properly.

REQUIRED ITEMS

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| <p><input type="checkbox"/> Check Information
 <i>My Sessions > Summary of Sessions > Filter and Choose Session to Review > Once in Editing Wizard use dropdown to review other sessions.</i>
 -Check titles, dates, or descriptions of sessions to ensure accuracy.</p> <p><input type="checkbox"/> Add or Edit Page Order Template
 <i>Settings > Session Templates > Page Order Templates</i>
 -This will be what shows up in the registration process for all sessions tied to this template.
 -Remember this is tied to the Session Template. Keep it consistent and in line for all sessions using it.</p> <p><input type="checkbox"/> Add or Edit Confirmation Email
 <i>Settings > Communication > Confirmation Templates</i>
 -Can use HTML for customization. Reach out to Kirsten. – Remember this is tied to the Session Template. Keep it generic for all sessions that use it.</p> <p><input type="checkbox"/> Add or Edit Payment Plans
 <i>Settings > Fees/Payments > Payment Plan Templates</i>
 <i>Bulk Add: Scheduling > Finances > Payment Plan > Filter down and complete OR Tools > Additional Tools > Bulk Updates > Choose sessions > Choose Payment Plans > Save</i></p> <p><input type="checkbox"/> Add or Edit Discounts
 <i>Settings > Simple or Multi-Week Discount Templates > Create/Edit Discount</i>
 <i>Bulk Add: Scheduling > Discounts > Simple or Multi-Week Discounts > Filter down and complete.</i>
 -Discounts must be added/scheduled to the session for a customer to use it.</p> | <p><input type="checkbox"/> Add or Edit Session Options or Activities
 <i>Settings > Option Templates > Option Categories + Option Templates > Add or Edit</i>
 -Create or add session options or activities if this is a part of your session(s).
 -If you are offering ACE funding, be sure to add that to your session offerings.</p> <p><input type="checkbox"/> Confirm Required Forms + Processes
 <i>Tools > Additional Tools > Bulk Updates > Walk through process to complete</i>
 -Any forms you require during or after the registration process should be chosen in bulk updates or session editing wizard.</p> <p><input type="checkbox"/> Create or Add Custom Questions
 <i>Settings > Custom Questions > custom Question Templates > Create/Edit</i>
 <i>Scheduling > Custom Questions > Session Custom Questions</i>
 -Need to ask an additional question(s) in the registration? Add it to a form or schedule it.</p> <p><input type="checkbox"/> Enable Public Registration/Bulk Updates
 <i>Tools > Additional Tools > Bulk Updates > Walk through process to complete.</i>
 -Bulk Update and click on enable public registration. If you want this to be open to all, click on visible to public as well.</p> <p><input type="checkbox"/> Creating and Scheduling Reports
 <i>Go to Reports > Create Custom Report</i>
 <i>Go to Reports > Rosters</i>
 -Use Fields and Filters to create one time or ongoing reports
 -Be sure to save reports you want to come back to</p> |
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OPTIONAL ITEMS

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| <p><input type="checkbox"/> Enable or Disable Waiting List
 <i>Update in Session Templates, Session Wizard, or Bulk Updates -</i>
 Enable the waiting list and choose the number of days someone would have to move from the waiting list to registered.</p> <p><input type="checkbox"/> Add Membership, Sponsorships, or Lodging
 If a part of your session.</p> <p><input type="checkbox"/> Pull Links
 <i>Tools > Management > Links to Ultracamp</i></p> | <p><input type="checkbox"/> Add Passwords or Prerequisites
 <i>Update in Session Wizard</i>
 If you require a password to register for the session or require other classes be taken first.</p> <p><input type="checkbox"/> Add Additional Fees
 <i>Update in Session Wizard or Schedule</i>
 -If you have additional seasonal or one-time fees, you will want to add those to your session.</p> <p><input type="checkbox"/> Add Donations Feature in Session Template(s)
 Are you asking for donation in this session? <i>Under reservation information in Session Template.</i></p> |
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