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:

Dev Club 5 Home Desk CRM		Reports Configuration Utilities E	nvrionment
Program Settings	CLASSES		
		DESCRIPTION	APPOINTMENT
 Billing Settings Bookings Settings Appointment Type Grid 	Zoga single	yoga, with a Z	Zoga
Appointment Types Bookings Options	Zoga 3	ongoing, Trainer, video	Zoga
Classes Club Hours Location Groups	Zoga 2	ongoing, video	Zoga
Locations	Zoga 1	ongoing	Zoga
Trainer Groups Check In Settings	Yoga single1		Yoga
Client SettingsClient Portal Settings	Yoga single		Yoga
 Cloud Storage Settings Digital Contract Settings 	yoga ongoing		Yoga
 Home Settings Lockers Settings 	Yoga new		Yoga
 Marketing Settings POS Settings 	Yoga Class	abc123	Yoga
 Reps Settings System Settings 	TestSingleEnrollment	-	TestDescripction
	1 2 3 4 🍽 🗰		

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

4. 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:

IT CLASS SETUP	SAVE
Name	Scheduled Sessions
New Class	*
Description	
This is a new class	Page: 1 / 0
Appointment Type Yoga * ~ 4 Enrollment Type	3
Single Enrollment *	~
ADD SESSIONS	
EDIT SESSIONS	
REMOVE SESSIONS	

5. 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	Ends		Will Create
	06/02/2020	After 1 month	~	0
	Repeats	Repeat every		Sessions
	Weekly	✓ 1 Weeks	~	3555015
	Days			
	SUN MON	TUE WED THU	FRI SAT	
3 Time	Start Time	Length		
	10:00 AM	© 30 minutes	~	
Trainers		Trainer		
		No Change	~	BASIC ADVANCED
6 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	5 Home	Desk	CRM	Office	Accounting	Billing	Reports	Configurat	ion Utilities	Envrionmen					Tom AARockwell using	TrockV2 Club 5 -
	EDIT		C3 RENEW	SALE	REFUND	REGISTER POINT OF SALE	SCHEDULE BOO	CLASSES KINGS	TIME CLOCK					٢	^{10:58} 02	^{tam} J un 2020
Class S	Sessio	ns								n Date 5/02/2020		To Date 06/09/2	020		Club 5 - Dev Club :	5 ~
2	ay, Tues Yoga sing Single Enrol	le	12		12:30 PM	Π	ainers		Locations	Enro 0	olled Sig O	ined in	Unpaid 0		VIEW 10 spots left	<i>F</i> •

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:

Dev Club 5 Home Desk CRM O	ffice Accounting Billing Reports Configuration Utilities Envrionment
SETTINGS CONTRACTS REPS CHARGE CODES SETTINGS REPS POINT OF	POS SETUP DAILY MONTHLY SALE SCHEDULER
Drogram Cottings	
Program Settings	
	GENERAL CLIENT PORTAL SETTINGS
Search for	GENERAL CELENT FORTAL SET INGS
Billing Settings	Allow the option to pay at the club when the initial payment fails.
Bookings Settings	Allow the option to pay at the club on all online joins.
 Check In Settings Client Settings 	Do not allow Canceled Clients to log in to their account.
Client Portal Settings	Do not allow Expired Clients to log in to their account.
General Settings	
Legal lext	Redirect address for when the logo is clicked.
Offer Tags Shopping Cart	http://google1.com
Thank You	Google Tracking ID
Video Settings	
 Cloud Storage Settings Digital Contract Settings 	UA-61256859-1
Home Settings	Your Google Tracking ID should be in a "UA-0000000-0" or similar format
Lockers Settings	Google Tracking Link
Marketing Settings	
POS Settings	
 Reps Settings System Settings 	Facebook Pixel ID
• System Settings	1530237050605280
	Facebook Events
ANTE AND THE STATES OF A SAME A	Page View
	Complete Registration
	☑ Watching videos on the Client Portal / App should record usage of "Virtual Class Usage"

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:

Dev Club 5 Home Desk CRM	Office Accounting Billing Reports Configuration Utilities Envrionment
SETTINGS CONTRACTS REPS CHARGE CO SETTINGS REPS POI	DES POS SETUP DAILY MONTHLY NT OF SALE SCHEDULER
Program Settings	
Search for	BOOKINGS OPTIONS
 Billing Settings Bookings Settings Appointment Type Grid Appointment Types Bookings Options Classes Club Hours Location Groups Locations Rules Trainer Groups Check In Settings Client Settings Client Portal Settings Cloud Storace Settings 	General Options Send Email Notifications Yes Grid Length 30 minutes Send a reminder before an appointment Number of hours 1 Show appointment alert during check in
 Digital Contract Settings Home Settings 	Number of hours
 Lockers Settings Marketing Settings POS Settings Reps Settings 	24 Automatically complete appointment during check in

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:

Dev Club 5 Home Desk CRM	Office Accounting Billing Reports Configu	ration Utilities Envrionment
SETTINGS CONTRACTS REPS CHARGE CODE	POS SETUP DAILY MONTHLY	
Program Settings		
Search for	EMAIL SETTINGS	
 Billing Settings Bookings Settings Check In Settings 	MAIL MERGE BOOKINGS ONLINE JOIN RECEIPTS	ONLINE SHOPPING CART RECEIPTS ON
 Client Settings Client Portal Settings Cloud Storage Settings 	Mail From Address	Cart Receipt Email
 Digital Contract Settings Home Settings Lockers Settings 	aortiz@tosd.com Mail From	Merge Tokens
 Marketing Settings POS Settings 	Shopping Cart	All V Search For
 Reps Settings System Settings Accounting Settings 	Reply To Address alyceortiz@gmail.com	FIRST NAME
Club Info Club Settings Colors	Subject	
Computer Settings Email From Addresses Email Settings	Online Shopping Cart	APPOINTMENT SECTIO

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:

		a saka konsta inako, kun naingan sakako na 7,44 ya hakebak		Ť	1
MAIL MERGE BOOKINGS ONLINE JOIN RECEIPTS	ONLINE SHOPPING CART RECEIPTS ONLIN	E BALANCE PAYMENT RECEIPTS	OFFER NOTIFICATION	ONLINE INFO CHANGES	GIFT
Mail From Address	Cart Receipt Email				
াইইটাই@tosd.com	Merge Tokens	Edit - Insert - F	Format 👻 Table 👻		
Mail From		Sorrats	─ B I 11pt	 Verdana 	<u> </u>
Shopping Cart	All 🗸		Previe	ew Open Docx	,
Reply To Address	Search For	[FirstName] [Last	Namel		
@gmail.com	FIRSTNAME	[PurchaseSection			
Subject	LASTNAME	[AppointmentSec	tion]		
Online Shopping Cart	APPOINTMENT SECTION				

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:

You are booked for the following appointments:						
Description	Appointment Date		Method of payment			
Yoga single	Tue, Jun 02, 2020 2:00 – 2:30 P	1 <u>Live Stream</u>	30 pack			
If you believe you received this message in error, please <u>click here</u> .						

- 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:

Unable to Stream	×
You cannot complete the class before the date of the class.	
	Close

• 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:

Unable to Stream	×
This live stream is not available at this time	
	Close

• 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.