Creating or Editing a Category

Categories are ways to organize similar classrooms, programs, or events. Using categories previously setup, make creating classrooms faster. When parents are registering from the Parent Portal, they must select a category before selecting the classroom. Categories can also be used to create reports for multiple classrooms.

Categories can also be grouped together into Category Groups. Rooms can be changed between categories. Parents will select a category group (if setup), then a category, then a room on registration.

To add a new category, select the Actions button, then select New Category-

1. Click the Actions drop-down
2. Select Add New Category
3. Complete the following options
4. Classroom Category - enter the name of the category
    - Classroom Category – enter the category name here. Examples:
        - Early Childhood
        - Infants
        - Before and After School Care
5. Student/Teacher Ratio – the ratio at the category level if all rooms built under the category will have the same ratio
6. GL Code – add the account number associated to the category level if using room category as a segment in the GL builder
7. Show All on Attendance – if the category has variable scheduling for classrooms within the category and the classrooms will be capturing unscheduled days
    - Yes
    - No
8. # Hours Max for Half Day FTE – the maximum number of hours for a classroom to be associated to half day FTE
9. Default Revenue Type - helps track revenue generated by categories
    - Default Revenue
    - Activity Fee
    - Late Fee
    - Registration
    - Tuition
10. Default Reporting Category – select only if every student in the category will be assigned to a reporting group
    - Reporting Group
    - Employee

- Regular Family

11. Daily Sheet – if a specific [daily sheet](#) should be associated with all classrooms under a category, select a daily sheet from the drop down menu

12. Allow Room Change Request – this has to be set on the category level and room level
    - Yes – if parents are able to submit schedule change requests
    - No – if parents are not able to submit schedule change requests

13. Allow Portal Parent Managed Day Removal - if the System Config setting for [Allow Days to be Removed](#) is set to Yes, then this setting will determine if the option is available for this room category
    - Yes - parents are able to remove previously scheduled days from a Parent Managed Calendar
    - No - parents are not able to remove scheduled days

14. Show Only on Scheduling
    - Yes – this category of programs will only be used for staff scheduling, students will not be scheduled in this room
    - No – this category is not only used for staff scheduling

15. Require Room Start and End Time Entry on Admin Side
    - Yes - staff is required to enter a start and end time when manually adding a schedule for students on the Family > Batch Enroll/Edit Screen or the student's PRA page
    - No - start and end time is not required

16. Restricted Rates – if there are specific rates that should only be assigned to one category, select this to display only assigned rates

17. Description – add a summary of the category of programs - this might include rates, hours, links to documents, site information etc. Parents will see this detail before they can select specific programs

18. Additional Online Registration Information
    - Registration Type
        - Normal – if programs are reoccurring or event types
        - Event – if programs are event types only
        - Store – if programs are store or item type rooms
        - Volunteer – if programs are volunteer type rooms
        - Adult Program – if programs are adult type rooms
        - Team – if programs are Team type rooms
        - Registration Only – if programs are registration only type rooms

19. Auto Approve New Registration
    - No – new registrations will require approval from the approval>registration area
    - Yes – new registrations will not require approval, any registration will automatically be approved

20. Single Page Registration

- Yes – rooms will show as available on the new registration page for a center
- No – rooms will not show as available on the new registration page for a center

21. Registration View
    - Catalog – displays blocks of program information
    - Table – information is displayed in a table format. To use this option, "Table – All Information" for Registration Look must be selected

22. Registration Sort
    - Catalog – options will be sorted by Program first, then Center/Facility
    - Center/Facility – options will be sorted by Center/Facility first, then select the Program

23. Registration Look
    - Table – All Information – must be used with "Table" under Registration View for this to work
    - Table with No Capacity – must be used with "Table" under Registration View for this to work. This removes the Capacity column
    - Program Catalog View – must use with "Catalog" under Registration View

24. Registration Unlock Code – enter a code parents would use to access room/programs under this category

25. Allow View Selection
    - Yes – category will display on the new registration page and portal registration
    - No – category will not display on the new registration page and portal registration
    - Connect Portal Only – category will only display for registration through the parent portal

26. Allow Center Selection Only
    - Yes
    - No

27. Opt Out of unlock code for checks
    - Yes – unlock codes cannot be used, parents must pay up front
    - No – unlock codes can be used on the cart page of registration

28. Use Time Constraints
    - No
    - Yes

29. Check Unlock Code – enter a phrase that parents can use to bypass paying up front

30. Send Admin Email on Portal Registration
    - No
    - Yes

31. Send Email on All Registrations
    - No
    - Yes

32. Allow Duplicates
    - No – parents will not be able to enroll their student in programs if there is currently an

active PRA. **Please Note**: if the student has an inactive PRA, this will not count as a duplicate

- Yes – there will be no duplicate check for students; students can be enrolled into the same program multiple times

33. Allow Multi-Select
    - No – parents will have to register for each program, one at a time. **Please Note**: this option must be used when using Plan Options
    - Yes – parents will be able to register for multiple programs within the same category at the same time

34. Display Confirmation Questions
    - Yes – confirmation questions will display during registration
    - No – confirmation questions will not display during registration

35. If applicable, when do you want pre-bill charged?
    - On Registration
    - On wait list Approval

36. Sequence # – number each category to update the order the categories display in on the new registration and portal

37. Late Selection Disclaimer

38. Color – select a hex color that will display during staff scheduling (this field was used to change the color of the blue banners on registration. However, this field is not compatible with the New Look and Feel version of the registration pages)

39. Extra Information

40. Registration Catalog (Top) – add photos, details, etc. that will display when a parent selects the category, while the parent is choosing a room/program

41. Registration Catalog (Bottom) – add photos, details, etc. that will display when a parent selects the category, while the parent is choosing a room/program

42. Finishing Text – add photos, details, etc. that will display when a parent completes registration for the category