

Adding Courses to the Portal

1. Check if all your tutors are already in the list of tutors
 - a. Login to memberwizard.com.au and go to Classes – Tutors/Convenors
 - b. The drop down list allows you to choose between Tutors and Convenors
 - c. Active only check box is ticked by default, so if an older tutor is coming back, maybe check the inactive list too. To make someone active or inactive, check or uncheck the Active box that you see when you double click on their name
 - d. To add a current member as a Tutor, Click the + Add button and start typing their name. Ensure that all the boxes are checked for their profile (unless there is a particular reason you don't want them to have access to something, and then click Save
 - e. To add a tutor who is not currently a member, you have to add them into the Members list first. So go to Members – Members and check again if they have a profile. Bear in mind that some older members may have been marked inactive, if they have not renewed for a while, so do check Status – Inactive as well. If you are absolutely sure they are not in the system, you will need to add them, so click +Add. We need as much information about members / tutors to be filled in as possible, and we MUST have email address and phone number, as well as the contact details for an emergency contact. In the Custom tab, there is a box Badge, where we record that we have created a badge for the member. In Organisation tab, change their membership type to Tutor, if they are going to be an honorary member or Annual/Six months otherwise. In the Groups tab, just enter check if they are willing to consider assisting in any other capacity. Once all this is entered Click Save. Then go to Step a (above) and create a Tutor or Convenor record for them.
2. Next go to Classes – Classes
 - a. If any of the previous terms classes are still listed (and have finished) you'll need to double click on them and make them Inactive. I normally uncheck the Allow Online Enrolment box too, but not sure if this is necessary.
 - b. We do not add a class for any free activity, so Morning coffee etc. is not listed.
 - c. Otherwise, click +Add and enter the name / description
 - d. Select a Subject from the drop down list. If none of the existing Subjects fit, feel free to add one using the large green Plus (+) box
 - e. Select Tutors from the drop down list. If you did step 1 previously, then there should be no surprises here. Note you can select more than one tutor per course
 - f. If any, select Convenor(s) from the drop down list. We normally only use convenors in the case that someone is doing a one off course (e.g. the estate planning seminar by the firm of lawyers and we intend to have one of our committee or Course team there as a convenor to take the roll etc.
 - g. If the course is a standard repeating pattern (e.g. Every week on Wednesday, even if there are a few weeks missed due to public holidays) or even a once off event, DO NOT click the See Description box. This is only for exceptional cases where the course might be three weeks on different days each week, for example.
 - h. Select the Frequency and the Day for the course

- i. The Pre-defined period thing has only just been added to Member Wizard and I haven't checked this out to know if it will work for us or not. For now, I'd suggest entering a Start Date and a Finish Date
- j. If there are any weeks missing in the repeat pattern, you can add these, using the Edit Excluded Dates
- k. Enter the start and Finish times in 24 hour format (1pm is 13 00)
- l. Select the Venue from the drop-down menu. If you need to add a new venue, you can use the Green (+) box
- m. We normally charge a fixed price per course, so the price for the term goes into the Member Cost Per Course box
- n. Enter the maximum number of students – I normally choose 10, unless the tutor has specified otherwise
- o. Leave the Payment Category as Class Fees
- p. I normally check all the other boxes except Suspend enrolment emails
- q. Click Save