HOMESCHOOL-LIFE.com Overview

An introduction to some of the core features of your website.
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I. WEBSITE TOUR

Homeschool-Life provides you with three websites, each with higher levels of security:

1) Public Site – No password needed

2) Member (secure) Site – Approved Members Login with a user name and password

   ![Membership Login](image)

   **Membership Login**
   - **User Name:**
   - **Password:**
   - You must have cookies enabled in your browser in order to log in.

   **SECURE LOGIN**
   - Request Membership in this Organization
   - **Forgot Your Username?**
   - **Forgot Your Password?**

3) Group Admin Site

   Only members whom you select to be website administrators will have an additional Login and Password for the Group Admin Site.

   Select **Group Admin Site** from the Top Navigation Bar:

   ![Administrator Log In](image)

   **Administrator Log In**
   - **Password**

   **Forgot Your Username?**
   - **Forgot Your Password?**

4) Open Multiple Sites when Updating

   Website Administrators may want to open both an admin site and a member site simultaneously when updating your website. This will enable you to make changes on the admin site and, after clicking **refresh**, see the changes on the member site.

   ![Multiple Sites](image)
II. OVERVIEW – How it all works...

1) PUBLIC: Request Membership

Request Membership in Training-MB!

Fill out the form below and click the Continue button at the bottom.
This site may require other information or dues before approving website membership.

☐ Check here if you have read and agree to the TERMS OF SERVICE:

* Indicates a required field

- Primary Last Name: 
- Primary First Name: 
- Primary Email: 
- Secondary Last Name: 
- Secondary First Name: 
- Additional Email Address(es): Separate multiples with a comma.

If additional email address(es) are entered above, should they also receive weekly email and forum notifications, etc.?
- Yes
- No

- Address: 
- City: 

* State/Country: For United States and Canada: 
  - For Other Countries: 
    - State/Province: 
    - Country: 

- Zip/Postal Code: 

This Request Membership form is customizable under
- Admin Site
  - Users
  - Members
  - Registration Process

2) Administrator Approves or Deletes Request

- Admin Site
  - Approval
  - Membership Signups
3) Administrators can Import a Group of Members from an Excel Spreadsheet
   • Admin Site > Users
     > Members
     > Import

   NOTE: The Excel Spreadsheet must follow the online Sample Template

III. FORUM (Group Communication Tool)
   1) Create Categories
      • Admin Site > Tools
        > Forum
        > Category List

   2) Set Members’ Receiving Ability
      Default is set to permit members to select the forum categories they wish to receive. To see
      this on the member site:
      • Member Site > Edit My Profile (Top Navigation Bar)
*Forum Emails: Would you like to receive forum notifications via email (not just the ones you create)?
- Yes  
- No

Many Emails: Would you like to receive notifications IMMEDIATELY?
- Yes  
- No

Delivery Type:
- Whole Thread  
- New Part Only

Daily Digest: Would you like to receive notifications ONCE A DAY?
- Yes  
- No

Select which forum categories you would like to be notified about:
- Bible Schools
- Board Members
- Classes being Offered
- Dance
- General
- Computer Help
- Field Trip
- Co-op Elementary
- Co-op Middle School
- Co-op High School
- Curriculum
- Graduation
- Legislative Alerts
- Member Events
- NEWS from the President
- Prayer Requests
- Small Group - Elementary
- Small Group - Middle School
- Small Group - High School
- Special Events
- Sports
- Summer Activities
- Testing
- What's Happening Around Town?

When Members’ Receiving Ability is set to YES, Members can select and deselect categories here, found under Edit My Profile.

If you wish to change this setting,
- Admin Site > Tools
  > Forum
  > Members’ Receiving Ability
3) How to send a Forum Message

- Member Site > Forum
  > New Thread

Forum - NEWS - Add Thread

1st Select a category from the drop down box.

2nd Message Title

3rd Type message
4) Secure Forums (Individual classes, Boards members, etc.)
Website Administrators can set up custom forums targeting specialized groups, to streamline communications to the people who need the information and eliminate excessive emails to your other members.

- Admin Site - >Tools
  >Forum
  >Category List

Select the Forum you wish to make secure by clicking on it and placing a checkmark in the box beside “Secure.”

AND select the Families you wish to include in the secure forum mailings:
5) Moderated Forums (President’s News, for example)

- Site Admin > Tools > Forum > Category List > NEWS from the President – Moderated

In this column, place a checkmark beside each person who should receive mailings from this secure forum.

This column is for the admins to see if each member is or is not receiving forums.

In this column, place a checkmark beside a person or a couple of people who will be moderating the forum.
6) Email Direct
   • Admin Site > Tools
     > Forums
     > Email Direct (Toggle Switch)

   Email Direct is a toggle switch. Click to turn on/click again to turn off. Turning email direct on makes it possible for members to email a forum message to forums@homeschool-life.com. An email will return to the sender, prompting them to select a category. After the category is selected, the message is posted to the forum.

   NOTE:
   • When Email Direct is ENABLED- If a family clicks “Reply” to a forum message, it will reply to forums@homeschool-life.com.
   • When Email Direct is DISABLED- If a family clicks “Reply” to a forum message it will reply to the last person who posted to that thread.

IV. CALENDAR
1) Create Categories
   • Admin Site > Calendar
     > Categories
     > Add New Record

2) Create a Calendar Event
   • Admin Site > Tools
     > Calendar
     > Click on the date of your event
1st Select a category from the drop down box.

2nd Event Title

3rd Event Begin & End Time

4th Event Description

5th Event Location – select from the dropdown box or add a NEW LOCATION.
3) Create a Calendar Sign-up Event
   • Admin Site  >Tools  >Calendar  >Click on the date of your event  >Follow the instructions under #2 above.
   >Checkmark  >Submit New Event  >Click on the “S” beside the event name on your calendar

NOTE: This will open the Calendar – Sign Ups (see example on the next page)
1st Type the email address of the person who is coordinating the event so they will receive messages when someone signs up.

2nd Checkmark this box to allow your members to see who is signing up. This is optional, but does sometimes motivate more people to attend your events when they see who else is going.
NOTE: There is much more you can do with sign-up events, but these four steps will help you collect a list of names of those who wish to attend your event.

4) Attach a Fee to a Sign Up Event

- Admin Site > Tools
  > Calendar
  > Click on the date of your event
  > Follow the instructions under #2 & #3 above.
  > When adding the Calendar Event Description (in #2 above) add the event costs. (See example below.)

1st Alert your members to any fees for the event when you add the Calendar Event (#2 above). Type the costs in the Event Description. This will avoid a surprise when they sign up and are prompted to pay.

3rd Copy this link to help you advertise the event through the Forum. Placing an event on the calendar does not announce it to the members until the Weekly Update goes out. A Forum announcement with a link to this sign-up form is a faster way to get the word out.

4th Submit
5) How to allow families to submit calendar events

- Admin Site ➔ Tools

1st – Click Yes.

2nd – Type the email address of the person who will be approving calendar submissions.

3rd – SUBMIT CHANGES
V. ACCOUNTING

1) Check Outstanding Balances

- Member Site > Accounting

### Accounting

**Statement of Account**

**Outstanding Balances**

<table>
<thead>
<tr>
<th>Account: General</th>
<th>Total: $0.00</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category / Invoice</strong></td>
<td><strong>Description</strong></td>
</tr>
<tr>
<td>CR</td>
<td>[Total Balance]</td>
</tr>
<tr>
<td>RR-001647</td>
<td>Registration</td>
</tr>
<tr>
<td>SU-013217</td>
<td>Event Registration for Justin MacAllister - Horse Show (Participant)</td>
</tr>
<tr>
<td>SU-013219</td>
<td>Event Registration for Jessica Elizabeth MacAllister - Horse Show (Participant)</td>
</tr>
<tr>
<td>SU-013218</td>
<td>Event Registration for Jared MacAllister - Horse Show (Participant)</td>
</tr>
<tr>
<td>SU-013216</td>
<td>Event Registration for Marjorie MacAllister - Horse Show (Participant)</td>
</tr>
</tbody>
</table>

2) Options on the Admin Site

- Listed by MEMBER.
  
  Admins can edit, print, email, makes notes, send invoices, record payments, make adjustments, and download to an Excel spreadsheet.

- Listed by INVOICE.
  
  Admins can edit, delete, add an invoice, and download to an Excel spreadsheet.

- Listed by PAYMENTS.
  
  Admins can edit, delete, add a payment, and download to an Excel spreadsheet.
SET-UP Accounting Categories, Adjustment Categories, PayPal Accounts, and Fiscal Year. This is also where your “Legacy” files (accounting data from prior years) are stored.

3) Set Fiscal Year

- Admin Site
  > Tools
  > Accounting
  > Settings
  > Accounting Settings

![Fiscal Year and Payment Currency Options](image)

4) How to Set up PayPal Accounts

- Admin Site
  > Tools
  > Accounting
  > Settings
  > Accounts
  > Add New Account

![PayPal Accounts Table](image)
5) How to Record Payments Received by Check or Cash

- Amin Site
  > Tools
  > Accounting
  > Accounts Receivable (or Payments)

Add New Payment

1st – Select the Member.

When a member is selected, you will see a dropdown of that member's outstanding invoices, grouped by category type.

(See sample on next page.)
2nd – Type the dollar amount received for a PP – Partial Payment category or check the box for FP – Full Payment.

3rd – Type description such as “Class Registration PAID IN FULL”

4th – Type Notes such as “Received in mail” or “Handed to me at co-op”

5th – Select Check or Cash

6th – Check # or Cash Receipt #

7th – Amount is added in 2nd step.

8th – Send an Email?

9th – SAVE completes the transaction. SAVE AND ADD TO BATCH INPUT is used if you are recording multiple receivables. They will be grouped in a batch and displayed on the screen so you do not need to start over with each check. (See sample below.)

ADD TO BATCH INPUT Sample – When you receive a stack of checks in the mail, using the SAVE AND ADD TO BATCH INPUT can help you to double-check your entries and compare your totals to ensure accuracy.
6) How to Invoice a Member

- Amin Site > Tools
  > Accounting
  > Invoices
  > Add New Invoice

1st – Select the Member.

2nd – Select a Category. (Custom categories can be added under Settings.)

3rd – Select Account.

4th – Select Due Date (can click on the calendar to find a specific date)

5th – Type a Description, such as Dairy Farm Tour Field Trip.

6th – Admin Notes

7th – Send an Email?

8th – SAVE completes the transaction. SAVE AND DUPLICATE saves the transaction and creates a duplicate transaction so you can invoice another family for the same event.
7) How to make an Adjustment

- Admin Site > Tools > Accounting > Adjustments > Add New Adjustment

![Add New Adjustment Form]

1st – Select the Member.

When a member is selected, you will see a dropdown of that member's outstanding invoices, grouped by category type.

(See sample on next page.)
### Add New Adjustment

<table>
<thead>
<tr>
<th>Member</th>
<th>Plutt, Eve — $755.00</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Category</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Invoice</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Account</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Amount</strong></td>
<td>Pay $710.00</td>
</tr>
<tr>
<td><strong>Pay</strong></td>
<td></td>
</tr>
<tr>
<td><strong>CR</strong></td>
<td>General</td>
</tr>
<tr>
<td><strong>RR-001648</strong></td>
<td>General Registration</td>
</tr>
<tr>
<td><strong>Register</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Date</strong></td>
<td>1/9/2016</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Teacher Credit - FY - MS Earth Science</td>
</tr>
<tr>
<td><strong>Admin Notes</strong></td>
<td>Full Year Middle School Earth Science</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Teacher Credit</td>
</tr>
<tr>
<td><strong>Transaction ID</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Amount</strong></td>
<td>100.00</td>
</tr>
<tr>
<td><strong>Send Email</strong></td>
<td>Yes ☑ No ☐</td>
</tr>
</tbody>
</table>

2nd – Input the adjustment amount or checkmark a box. The number you input will be positive, but because it is an adjustment it will be deducted from the total amount due.

3rd – Type a description.

4th – Add notes to help define why the adjustment was made.

5th – Select a type. If you want to add a custom type, do so under:
- >Tools
- >Accounting
- >Settings
- >Add New Adjustment Category

6th – Amount is added in 2nd step.

7th – Send an Email? If no, the transaction will just appear in the member’s account. If yes, an email will alert the member to the transaction.

8th – SAVE completes the transaction. SAVE AND ADD TO BATCH INPUT is used if you are recording multiple adjustments. They will be displayed on the screen with a running total. This will allow you to see what you have completed and will save some screen information so you do not need to start over with each transaction.
VI. CLASS REGISTRATION

1) Administrative Options

- Amin Site > Tools
  > Class Registration

2) How to Set Up a Class Matrix

- Amin Site > Tools
  > Class Registration

Because of the diversity of classes offered, classroom space, grades/ages of students, etc., your matrix settings will need to be customized for your group in a way that best meets your needs. The Class Matrix is a layout of your available classes from which your families will make their selections. For example, it may look something like this:
These Matrix Settings would result in the following Matrix Layout, after classes are entered:

### Class Registration

#### 2016-2017 High School

<table>
<thead>
<tr>
<th>Room 215</th>
<th>Room 220</th>
<th>Room 225</th>
<th>Room 230</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tuesday 8:30 HS 1st Semester</strong></td>
<td>SAT Math Prep</td>
<td>1st Semester</td>
<td>9th - 12th</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dennis Mathews</td>
<td></td>
</tr>
<tr>
<td><strong>Tuesday 8:30 HS 2nd Semester</strong></td>
<td>Life Skills Management</td>
<td>2nd Semester</td>
<td>9th - 12th</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dennis Mathews</td>
<td></td>
</tr>
</tbody>
</table>

#### 2016-2017 Middle School

<table>
<thead>
<tr>
<th>Room 215</th>
<th>Room 220</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Tuesday 8:30 MS Full Year</strong></td>
<td><strong>Tuesday 9:50 MS Full Year</strong></td>
</tr>
<tr>
<td>Civics Full Year</td>
<td>Civics Full Year</td>
</tr>
<tr>
<td>6th - 8th: 11 y/o - 13 y/o</td>
<td>6th - 8th: 11 y/o - 13 y/o</td>
</tr>
<tr>
<td>Tamara Wunderbar</td>
<td>Tamara Wunderbar</td>
</tr>
<tr>
<td>Literature Full Year</td>
<td>Literature Full Year</td>
</tr>
<tr>
<td>6th - 8th: 11 y/o - 13 y/o</td>
<td>6th - 8th: 11 y/o - 13 y/o</td>
</tr>
<tr>
<td>Temple Beautiful</td>
<td>Temple Beautiful</td>
</tr>
<tr>
<td><strong>Tuesday 11:15 MS Full Year</strong></td>
<td><strong>NURSERY - Infants</strong></td>
</tr>
<tr>
<td>Anatomy &amp; Physiology Full Year</td>
<td>Nursery Full Year</td>
</tr>
<tr>
<td>6th - 8th: 11 y/o - 13 y/o</td>
<td>1 y/o - 2 y/o</td>
</tr>
<tr>
<td>Mejorie Montgomery</td>
<td>Buelah Steiger</td>
</tr>
<tr>
<td>Physical Science Full Year</td>
<td><strong>PreSchool - 2 &amp; 3</strong></td>
</tr>
<tr>
<td>6th - 8th: 11 y/o - 13 y/o</td>
<td>Pre School: 2 y/o - 3 y/o</td>
</tr>
<tr>
<td>Theresa Outstanding</td>
<td>Molly Green</td>
</tr>
</tbody>
</table>

#### 2016-2017 Junior Co-Op

<table>
<thead>
<tr>
<th>Junior Co-op - Upstairs</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>NURSERY - Infants</strong></td>
</tr>
<tr>
<td>Nursery Full Year</td>
</tr>
<tr>
<td>Nursery: 1 y/o - 2 y/o</td>
</tr>
<tr>
<td>Buelah Steiger</td>
</tr>
<tr>
<td><strong>PreSchool - 2 &amp; 3</strong></td>
</tr>
<tr>
<td>Preschool Full Year</td>
</tr>
<tr>
<td>Pre School: 2 y/o - 3 y/o</td>
</tr>
<tr>
<td>Molly Green</td>
</tr>
</tbody>
</table>
MATRIX SETTING SUGGESTIONS

This list contains suggestions to consider when you are setting up your Class Registration Matrix. It is not an exhaustive list but may help start spark your creativity. You would choose only 1 (one) bullet point in each category.

**Matrix Management:**
- Preschool, Elementary, Middle School, High School
- Fall Semester, Spring Semester, Full Year Classes
- Days of the week when you offer Classes
- Categories of Classes offered (Science, Math, Literature, Enrichment, Art, PE)
- Hours or Periods

**Column Management:**
- Rooms or Locations
- Grades or Ages
- Class Times

**Row Management:** (if not used for Column Management)
- Rooms or Locations
- Grades or Ages
- Class Times
- A, B, C, etc.
- 1, 2, 3, etc.

After your matrix is set up, it is time to add classes. One way to streamline this process is to create a “Teacher” admin login that will be shared by all of your teachers. They can input their classes and set up their own Instructor profile and biography. Here is how to do this:

3) How to Set Up an Additional Administrator

- Admin Site >Users
  >Administrators
  >Additional Administrator - Add
It is possible at this point to give your teachers the login and password information, plus the following instructions on how to add their classes and themselves as instructors, so they can do the required data entry.
4) How to Add a Class

- Amin Site > Tools > Class Registration > Classes & Rosters

> Add New Class

<table>
<thead>
<tr>
<th>Classes &amp; Rosters</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Class</strong></td>
</tr>
<tr>
<td>4th - 5th Grade</td>
</tr>
<tr>
<td>2016-2017, Junior Co-op, Junior Co-op - Upstairs, 4th &amp; 5th Grades</td>
</tr>
</tbody>
</table>

**Create New Class**

- **Type Class Title**
- **Type email of person(s) who should be notified when students register.**
- **Click on grades and ages of students for which the class is intended. Use CTRL or SHIFT to select a range of grades or ages.**
- **Check this box to only allow students in the selected age range to register.**
- **Select the instructor. ADD INSTRUCTOR if not on dropdown list.**
- **Enter curriculum, text, supplies, syllabus, etc.**
Select the location. Add a new Location if not on the dropdown list.

Select all of the days of the week the class will meet.

Enter the class start and finish dates.

These three dropdown boxes tie into the matrix that you built. Select the matrix, column, and row where you wish the class to appear.

Enter the class start and finish times.

Type a detailed description of the class.

Enter a number for how many students are permitted in the class. If more students sign up they will be placed on a wait list, if “Allow Waiting List” is checked below.

Enter a number for the minimum needed to hold a class.

How many parent helpers will you permit in the class?

If min. is not met by this date, the class closes.

Must be open to begin registration.

Date & Time Signup’s begin. (Not required.)

Registrations close on this date.

If you want to have waiting lists, this checkbox and this Waiting List Message must be completed.
Enter your fees students will be required to pay to attend this class. These fees will be itemized on the class matrix where members will be selecting their classes. On the invoice and statement of account the total as one lump sum will be listed for this class.

Select which account will receive the money, possibly the group or the class teacher.

Select Payment Type (accounting category). More categories can be added under >Settings.

Click CREATE CLASS
5) How to Add an Instructor

- Amin Site > Tools
  > Class Registration
  > Instructors
  > Add New Instructor

These fees will be itemized on the Class Matrix so they are visible when a member is choosing which classes to attend, but will be lumped into one sum on an invoice and on the member's statement of account.

Select the PayPal account where you want the payment deposited. This may be your group account or possibly a teacher's account.

Select the Payment Type (or accounting category). More categories may be added under > Settings.

Input Instructor Information

Input Instructor Biography

Add Instructor Photo (if desired)

Click NEW
6) How do Students Register

- Member Site > Class Registration
  > Click on the Class

Select the PayPal account where you want the payment deposited. This may be your group account or possibly a teacher's account.

Select the Payment Type (or accounting category). More categories may be added under >Settings.

Check the box beside the student who will be taking this class.
7) How can Members Check Their Registration

- Member Site > Class Registration
  > Click on View Class Registration Summary

Here’s the class registration we just completed!
8) How can Members Check Classes in Accounting

- Member Site > Accounting

Here's the class registration we just completed!

9) How Can Administrators Check a Family's Registration

- Admin Site > Tools > Class Registration > Registrations

Select Family Name
10) How Can Administrators (or Teachers with admin login) Check Class Rosters

- Admin Site  > Tools
- > Class Registration
- > Classes & Rosters

VII. MEMBERS
1) How to Update or Delete Individual Members

- Admin Site  > Users
- > Members
- > Manage
2) How to make Mass changes to Membership such as Parking or Assigning Sections

- Admin Site
  - Users
  - Members
  - Edit Information

Parking a member is used when a member has not renewed yet, but is probably planning to renew soon. Rather than delete their account, they can be parked. Parking retains their information but prevents them from logging in.

Sections are used when offering a staggered registration for co-op classes, such as teachers first, seniors next, etc. Sections are set under--

Admin Site:
  - Users
  - Members
  - Sections

VIII. DOWNLOAD to EXCEL

1) How to Download the Membership Directory

- Admin Site
  - Users
  - Members
  - Directory
2) Other Data that can be Downloaded to Excel

- Admin Site > Tools
  > Accounting, Class Registration, etc.
  
  ![Excel Icon](Image)

 IX. HOW TO LEARN MORE

1) Watch our Instructional Videos available on YouTube

- Admin Site > Admin Home
  > YouTube Channel
  > Subscribe

2) Look at the home pages of other groups for ideas—

  > Groups/Co-ops
>Click on the state of your choice

>Click on any group to view their public homepage
3) Join the Forum for Leaders

- Admin Site > Admin Home
  > Bottom Right – Admin Corner
  > Forum for Leaders
  > View Now

4) Request Time with a Trainer

- Admin Site > Admin Home
  > Create a Ticket

5) Join us for Webinars, announced through the Support Site for Group Leaders, #3 above.