

GETTING STARTED GUIDE: How to get started with iCare?

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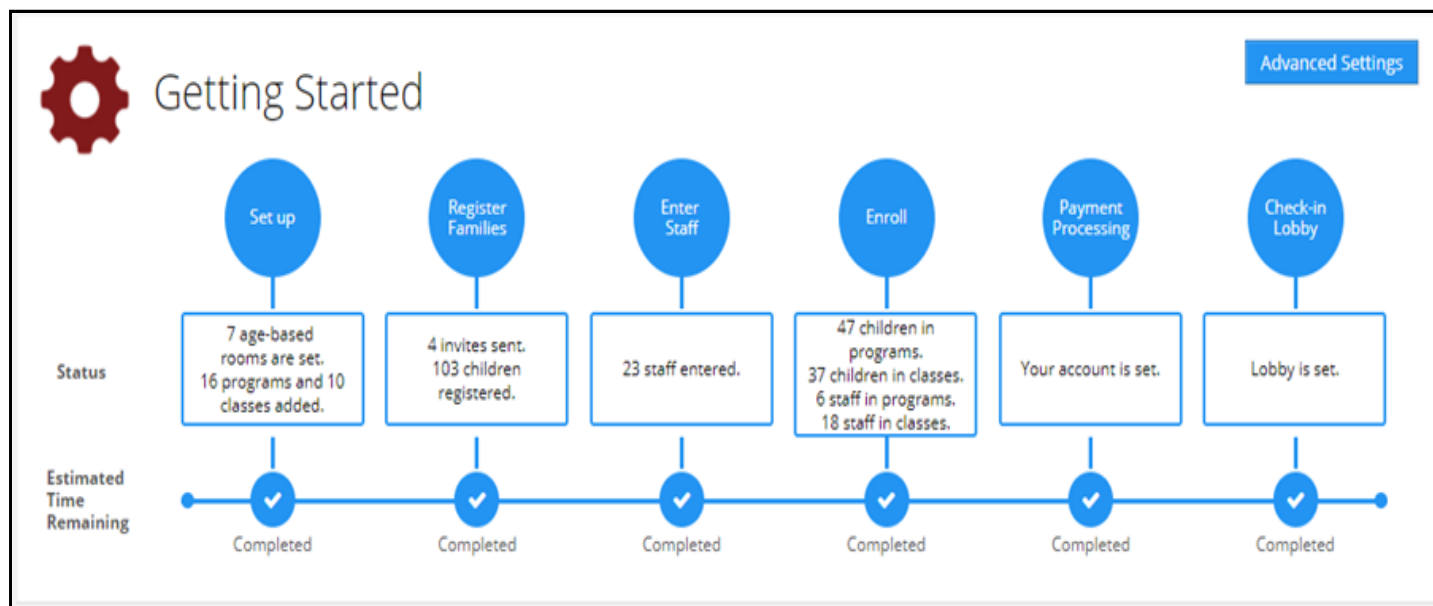
Replied by : support@icaresoftware.com

Getting started with iCare is very easy, please follow these instructions to create your personalized iCare account;

Getting Started

1. After finishing the Sign-up process, you will receive a conformation email from iCare, read the instructions carefully.
2. Now, you may log in to the iCare application using your Login Credentials;
3. Once you log in, you'll be directed to the Getting Started page, here you need to setup and customize your account;

Getting started is a simple 7 step process,



STEP 1: - BASIC SETUP

- a. Here, you add and edit your basic information like Center Info, Contact Info and Operation Info.
- b. Click Save every time you make any changes.
- c. Use Manage Sites button to create sites for your center to manage various locations (Sub-buildings)
- d. And, use Change Logo button to set your own logo to use the iCare application.
- e. Click Next to proceed.

Step 1
Basic setup

Step 2
Manage Rooms

Step 3
Create Programs/Classes

Step 4
Add Families and Staff

Step 5
Enroll Children and Staff

Step 6
Set up Payment

Step 7
Set up Lobby

Basic setup

▼ Center info

Center Name

iCare Sandbox

URL

https://icarenextgen.icaresoftware.com

Address

54

City

Boston

State

MA

Country

US

Zip Code

30123

IRS ID#

30123

Enter contact
info here

Manage Sites

Change logo

Set your logo for
the application

Save ▶

> Contact info

> Operation info

Enter Center Opening and
Closing Time here

Next ▶

STEP 2: - MANAGE ROOMS

- Rooms are Age-Based groups of children to manage child-teacher ratio at a center.
- In this Step, you may either select default Rooms from our database or create new Rooms.

Manage Rooms

OFF Select ON if you use age-based room or OFF is you don't

Age-based rooms are used for creating groups and managing child-teacher ratios in centers and preschools. Edit, remove or add new ones according to your needs. If you don't use rooms you can remove all.

[More details...](#)

Click here to add a new room

Add Room

Actions

	Room Name	Sites	Capacity	Max # of Children per Teacher	Age From (months)	Age To (months)
<input type="checkbox"/>	Infant	iCare Sandbox(1)	6	3	0	12
<input type="checkbox"/>	Toddlers	iCare Sandbox(1)	10	5	12	24
<input type="checkbox"/>	Toddlers2	iCare Sandbox(1)	10	5	24	36
<input type="checkbox"/>	3-year	iCare Sandbox(1)	16	8	36	48
<input type="checkbox"/>	4-year	iCare Sandbox(1)	16	8	48	60
<input type="checkbox"/>	KG	iCare Sandbox(1)	18	12	60	72
<input type="checkbox"/>	Schoolage	iCare Sandbox(1)	36	18	72	

Showing 1 to 7 of 7 entries

Show 10 entries

OFF Automatically update children's room based on the age limits set here

Click here to proceed

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- c. To add a new room, click on 'Add Room' button and enter the details of the new Room, click tick-mark or hit enter to save Room,

	Room Name	Sites	Capacity	Max # of Children per Teacher	Age From (months)	Age To (months)
<input type="checkbox"/>	<input type="text"/>	None selected	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="checkbox"/>	Infant	iCare Sandbox(1)	<input checked="" type="checkbox"/>	3	0	12
<input type="checkbox"/>	Toddlers	iCare Sandt	0	5	24	24
<input type="checkbox"/>	Toddlers2	iCare Sandbox(1)	10	5	24	36

d. Click Next to proceed.

Step 3: - Create Programs/Classes

a. Create new Programs and Classes to schedule children and staff. To add a new Program or Class, click the 'Add New' button.

Create Programs/Classes



A Program or class has a preset schedule and bill. When you enroll children in it, they get that schedule and bill. You can customize a child's schedule and bill by editing it.

[More details...](#)

Summary of active and future programs and classes:

Show past schedules also

Click here to add a new Program or class



Add New

Program/Class name	Start Date	End Date
Spanish Beginner	05/28/2017	02/03/2018
Chess Beginner	05/28/2017	02/03/2018
French Beginner	05/28/2017	02/03/2018
Music Beginner	05/28/2017	02/03/2018
Music Intermediate	05/28/2017	02/03/2018
Music Advanced	05/28/2017	02/03/2018
Chess Intermediate	05/28/2017	02/03/2018
Chess Advanced	05/28/2017	02/03/2018
Spanish Advanced	05/28/2017	02/03/2018
French Advanced	05/28/2017	02/03/2018

Click here to proceed further



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b. Enter the details and click Save to add the Program/Class.



Program / Class Name

1. Enter a name here

2. Link with a Room to create a Program

ROOM

Site: Select Sites

Room: Not-specified

Capacity:

Save

Cancel

SCHEDULE

Start Date * [calendar icon]

End Date [calendar icon]

	Mon	Tue	Wed	Thu	Fri
Start Time	06:00 AM	06:00 AM	06:00 AM	06:00 AM	06:00 AM
End Time	06:00 PM	06:00 PM	06:00 PM	06:00 PM	06:00 PM

PARENT OPTIONS

- Offer this Program/Class for online enrollment.
- Allow parents to customize Start/End Dates
- Allow Parent to customize Days of the week
- Allow Parent to customize Start/End Times

3. Enter Start/ End Date and Time here

DEFAULT BILLS

	Amount/Rate	Period ⓘ	Account	Description
<input type="checkbox"/>	Enter amount/select	---Select---	---Select---	

*You can add more billing lines after clicking on Save.

4. Set default bill with amount and billing period

Step 4: - Add Families and Staff

- a. Here, you may send multiple invites to, family members of children and to staff, or you may import or add data manually.

The screenshot shows a multi-step process for adding families and staff. At the top, a progress bar indicates seven steps: Step 1 (Basic setup), Step 2 (Manage Rooms), Step 3 (Create Programs/Classes), Step 4 (Add Families and Staff), Step 5 (Enroll Children and Staff), Step 6 (Set up Payment), and Step 7 (Set up Lobby). Step 4 is currently active.

Add Families and Staff

Enter or Import Family Data ?

You can enter family data in 3 ways:

1. Ask parents to do it by sending them an invite. This is the fastest way, which also assures that you have accurate data.
2. Import it through an Excel Sheet.
3. Enter it manually yourself.

Enter an email address, hit enter and click Send Invite (with a red arrow pointing to the text input field below)

METHOD 1. Invite parents to enter their own data (preferred).
Parents will receive an email with login credentials. When they log in they will be asked to enter their data. After adding their data they will be able to use all the features of iCare intended for them.

Copy & paste the email address of parents. If needed, you can send invitations repeatedly.

Send Invite Send Reminder [Pencil icon] [Gear icon]

METHOD 2. Import data through on Excel sheet.
[Click here to import data.](#) ← **Click on the link to import data**

METHOD 3. Enter family data manually.
[Click here enter families manually yourself.](#) ← **Click here to add manually**

> Enter Staff ?

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Step 5: - Enroll Children and Staff

NOTE: - At this step, you may not be able to edit the Program/Class field. To edit, you need to finish the 7-step process.

- a. You may now, enroll children and staff in Programs/Classes. Click a Program/Class name from the list.

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Enroll Children and Staff

Click on a Program/Class Name to enroll children or staff in it.

**Click on a Program / Class name
to enroll children and staff**

Summary of active and future programs and classes:

Program/Class name	Children Enrollment	Staff Enrollment
Spanish Beginner	4	2
Chess Beginner	3	2
French Beginner	4	2
Music Beginner	5	1
Music Intermediate	4	2
Music Advanced	3	1
Chess Intermediate	3	2
Chess Advanced	4	2
Spanish Advanced	3	2
French Advanced	4	2
Infant HD	4	1
Infant FD	3	0

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- b. You'll be directed to the P/C details page, use the add children and add staff buttons ('+' icons) to enroll children and staff.



Chess Beginner

3 enrolled; 22 spots available
1 spot opening on 2/3/2018

Class ID 11

Room Not-specified

Age -

Enrollment Capacity 25

Legislated Ratio

ROOM

Site iCere Sandbox(1)

Room Not-specified

Capacity 25

SCHEDULE

Start Date 5/28/2017

End Date 2/3/2018

	Mon	Tue	Wed	Thu	Fri
Start Time	03:00 PM	03:00 PM	03:00 PM	03:00 PM	03:00 PM
End Time	04:00 PM	04:00 PM	04:00 PM	04:00 PM	04:00 PM

PARENT OPTIONS

- Offer this Program/Class for online enrollment
- Allow parents to customize Start/End Dates
- Allow parents to customize Days of the Week
- Allow parents to customize Start/End Time

DEFAULT BILLS

	Amount	Period	Account	Description
<input type="checkbox"/>	<input type="text"/>	---select---	Select Account	<input type="text"/>
<input type="checkbox"/>	200	Monthly (Fixed)	Activity	TutionDeposits + ChessBeginner + Monthly

Have a special rate chart and don't know how to enter it here, email it to tech@icaresoftware.com for help.

*Attendance overage fees past the center closing time is \$2/min. [Edit](#)

Add new program & class +

Click here to add

Staff



Search...



Grace, Lauren



Collins, kenneth

Click here to add

Children



Search...



William, Joshua

KG, 5y 10m



Noah, Elijah

KG, 6y 3m



Taylor, Oscar

KG, 5y 2m

STEP 6: - Setup Payment

- a. To setup Payment Processing Account, click the Payment Processing Merchant Account link your screen,

Set up payment processing

Your payment processing account is set.

Once your payment processing account is set, money from payments will go directly to your bank account. In most cases, the account application is approved within 48 hours

[Click here to set your payment processing merchant account.](#)

Click here to setup your Payment Processing Account

Tip: The TransFirst processing fee is much lower for direct deposits than for credit cards. Set up for direct deposit.

You can set up Direct Deposit (automated recurring payment) through the payment processing page, which is accessible from Balances, Transactions and Ledger reports.

iCare Billing Rules

- A. Weekly and bi-weekly bills are posted on Fridays before the next scheduled period.
- B. Monthly and semi-monthly bills are posted 2 days before the next scheduled period.
- C. The bills for the first scheduled period are posted immediately on the day of registration. Afterwards, the bills are posted according to above schedules.
- D. Attendance charges are posted at the end of every day, and lump payments are collected on Fridays.

Late payment fee automation option

[Click here to set up late payment fee.](#)

Click the link to set Late Payment Fee

Dayending Setup

Automatic(Dayending) Billing

ON Time

OFF

Manual Billing

Set Automatic / Manual Billing here

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b. In Transfirst Confirmation Setup window, enter the Gateway IDs and Keys for both admin and parents. Click Save to finish.

Transfirst configuration setup X

AdminParent

Enter the ID and Keys here

Gateway ID

Reg Key

Hosted Key

SaveCancel

With your merchant account for iCare you will receive 2 sets of Gateway IDs and keys. Enter those in the Admin and Parent tabs.

Step- 7: - Setup iCare Lobby

- a. In this final step, please setup a Lobby Password to access and open the iCare Lobby,

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iCare Lobby for Attendance of Children and Staff

You can run iCare Lobby on any tablet, smart phone, desktop or laptop. Simply enter the following address in the browser:

<https://lobby.icaresoftware.com/>

← Visit iCare Lobby using this link

Follow instructions given in the Lobby for opening and operating it.

And, set up the following:

Credentials for Opening the Lobby

Email Address:

support@icaresoftware.com

Password:

← Set your Lobby Password here

Signature Capture

OFF Signature required for staff check-in.

ON Signature required for children check-in.

Door Security

Door security: [Click here for instructions to install electronic door security.](#) (Android Only)

OFF Late Pickup Fee After Closing \$ per / minutes.

← Set Late Pick-up Fee here

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✔ Complete

- b. Click on the link under the heading Door Security to see the instructions to install iCare Door Switch.
- c. Click Complete to finish.

4. Congratulations, your iCare account is setup with all the necessary information, if you wish to make changes or update new information, go ahead and access your account.

Leave a Comment / Question

Email

Comment

Source		▼				
	▼					
Styles ▼	Format ▼	Font ▼	Size ▼	▼ ▼		

Submit Cancel

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