

Getting Started

with Party Booking Management



This Getting Started Guide

will walk you step-by-step through configuring and using the **Party Booking Management** feature for iClassPro.

The following pages provide some general definitions, notes, and a brief explanation of the Party Booking Management features to help you understand the information being displayed and how to use it for managing parties at your facility.

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★ What is Party Booking Management?

iClassPro's Party Booking Management feature is designed to help businesses manage party bookings in-house and online.

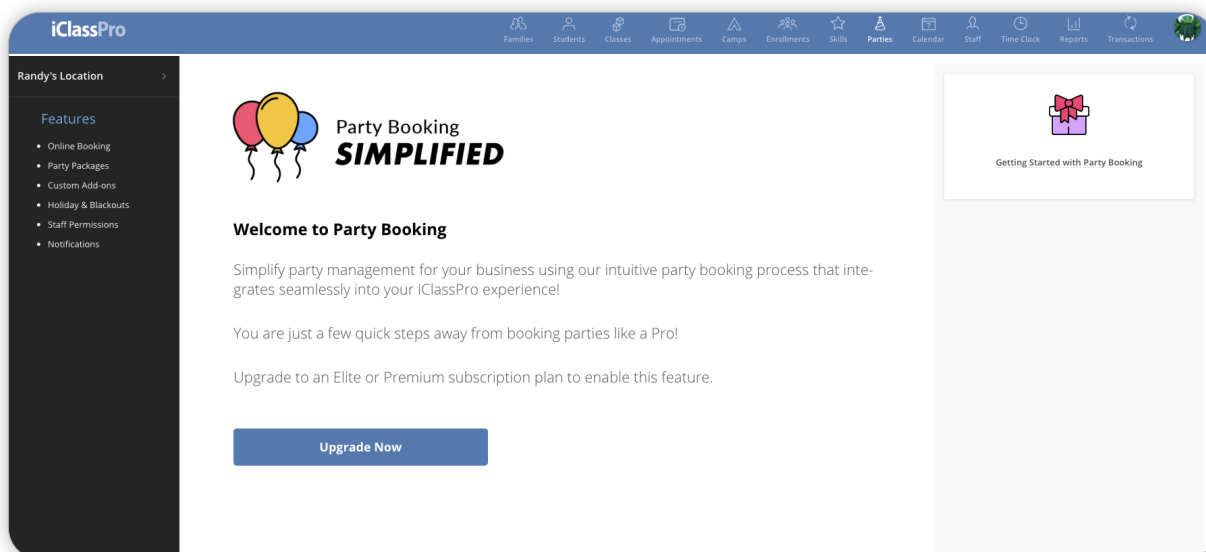
There are three major components of the Party Booking Management feature:

- PARTIES Page (Office Portal)
- SETTINGS > PARTIES section (Office Portal)
- PARTY BOOKING section (Customer Portal/Mobile App)

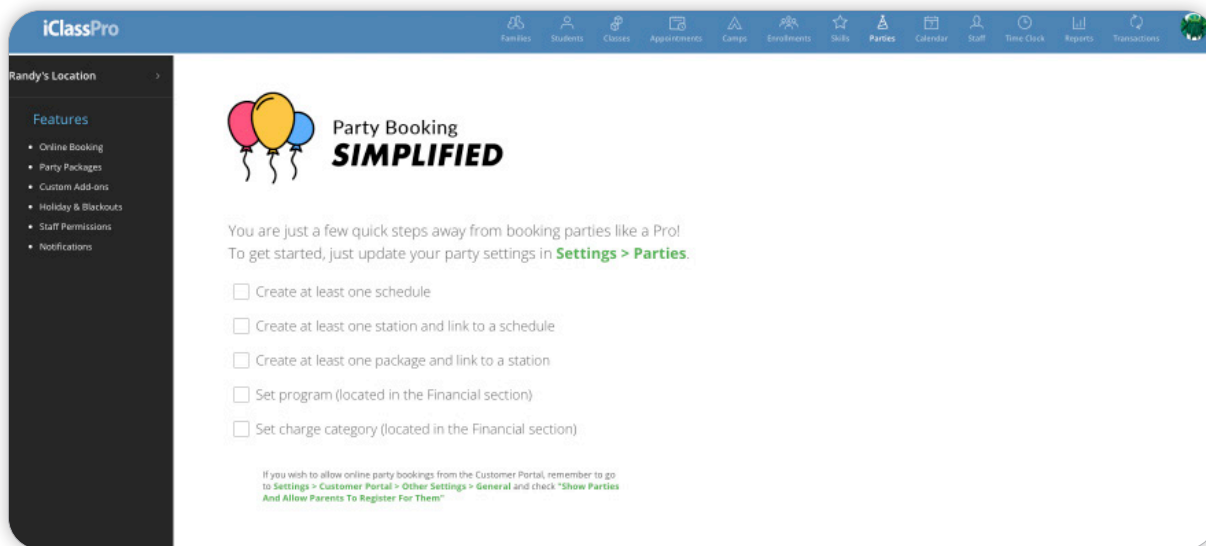
Each of these sections has a unique purpose.

PARTIES Page (Office Portal)

The PARTIES page is visible by default; however, you must have an Elite or Premium iClassPro subscription plan in order to configure and use the Party Booking Management feature.



If you have an Elite or Premium iClassPro subscription plan, use the checklist displayed on the PARTIES page to walk through the initial setup and configuration.



SETTINGS > PARTIES section (Office Portal)

The settings for parties are located under **SETTINGS > PARTIES**. Completing these settings is an essential step in order to create available party bookings and custom party options. We will look closer at each of these settings later in the guide. Below is a brief description of each setting.

- **Time Slots** define the date/time when party Stations will be available for booking.
- **Stations** are designated spaces at your facility available for party bookings.

- **Packages** describe the party experience that the customer is purchasing. Each Package is assigned a flat rate fee and can vary by Station.
- **Add-ons** are optional items that are attached to Packages to up-sell the party experience. These are available items not included in the basic Package price such as a special appearance, pizza, cake, party favors, etc. Each add-on has a designated price and an optional maximum quantity limit.
- **Financial** settings dictate how party income is tracked within iClassPro, including how it is displayed on financial reports. Like classes or camps, the Party Booking Management feature must be associated with a Program and a Charge Category for recording fees.
- **Other** is where you can create a generic party booking waiver for the customer booking the party to agree to, specify the lead time for party bookings, and customize the confirmation email that is sent to customers and your facility.

PRO | TIP

Use the up/down arrows to the right of your Package and add-on options to place them in the order you wish them to appear on the Customer Portal!

PARTY BOOKING section (Customer Portal / Mobile App)

Parties have a dedicated section of the Customer Portal/Mobile App with a wizard to walk your customers through selecting a date/time for their party, choosing a party Package, and selecting any add-ons they wish to purchase. Once parties are enabled in your Customer Portal settings, all party Time Slots that are not already booked or disabled will show online (as shown below).

The screenshot displays the 'Party Booking' section of a web application. At the top, a navigation bar includes links for 'Booking', 'My Account', 'ProShop', and 'More'. The main header is 'Party Booking'. Below this, a progress bar shows four steps: 1. Date, 2. Time, 3. Package, and 4. Other. The current step is 'Step 1: Select a Date'. A calendar for April 2023 is shown, with days of the week (Su, Mo, Tu, We, Th, Fr, Sa) and dates (1-30). The date '8' is highlighted with a blue circle, indicating it is the selected date.

★ User Permissions

The business owner or an admin user must give permission for additional staff users/user groups to access party information.

To grant these permissions to a user group, navigate to **SETTINGS > SETUP > STAFF SETTINGS > USER GROUPS** and click the pencil/edit icon next to the user group for whom you wish to edit permissions.

Parties have two levels of access to adjust, which are:

- **Page Access** – gives the user access to the PARTIES page in account navigation and to the settings to add party options.
 - + To access the PARTIES page, staff members will need the “Parties” page permission set to full.
NOTE: To configure/update party Time Slots, Stations, Packages, and other details, staff members will need full permission to the “Settings” page.
- **Task Access** – establishes the level of control the user has over parties from the PARTIES page.
- **Viewing/Creating Party Bookings**
 - + To **view** party bookings, staff members will need “View” permissions to the “Parties” task.
 - + To **edit/create** party bookings or enable/disable individual party Time Slots, staff members will need “Full” permissions to the “Parties” task.
- **Deleting Party Bookings**
 - + To **delete** existing party bookings, staff members will need “Full” permissions to the “Delete Party” task.

★ Party Setup

Before you can book your first party, you must configure your settings under **SETTINGS > PARTIES**.

Time Slots

Under **SETTINGS > PARTIES**, expand the “Time Slots” menu and click on **New Time Slot**. Then configure the following options:

- **Time Slot is Active** – when enabled, the Time Slot will be displayed as a current schedule option for party Stations.
- **Name** – the name that will be displayed for the individual Time Slot.
- **Start Date** – this is the date that this Time Slot begins populating for available party times.
- **Start Time** – this is the time of day the Time Slot begins.
- **Stop** – defines when the Time Slot will cease to appear as an option for available parties.

The screenshot shows a web form titled "Time Slot Details :: New". It contains the following fields and options:

- Time Slot is Active:** A checkbox that is checked.
- Name:** A text input field containing "Weekends 10PM".
- Start Date:** A date picker showing "04/01/2018".
- Start Time:** A time picker showing "10 PM" and "00".
- Stop:** Radio button options for "Never", "After 09/01/2018" (selected), and "After [] occurrences".
- Duration:** A text input field showing "60" with a "minutes" label.
- Select Day(s):** A list of days with checkboxes: Sunday (checked), Monday, Tuesday, Wednesday, Thursday, Friday, and Saturday (checked).
- Buttons:** "Save" and "Close" buttons at the bottom.

- + **Never** – the Time Slot is ongoing
- + **After [DATE]** – the Time Slot will no longer appear as an option after the specified date.
- + **After [X] occurrences** – the Time Slot will no longer appear as an option after “X” many occurrences. (For example, if the Time Slot is only available one day a week and you enter “6”, it will cease to appear as an option after 6 weeks. If it is available on multiple days of the week, it would cease to appear after 6 occurrences have passed.)
- **Duration** – reflects the duration of the Time Slot in minutes. (For example, entering “120” creates a two-hour Time Slot beginning at the Start Time.)
- **Select Day(s)** – select which day(s) of the week this Time Slot is available for parties.

Repeat these steps for all available party Time Slots. Remember to save your settings.

Stations

Under **SETTINGS > PARTIES**, expand the “Stations” menu and click on **New Station**. Then configure the following options:

- **Station is Active** – when enabled, the Station will be displayed as a current option for party bookings.
- **(optional) Station Expires On** – if an expiration date is entered, the “Station is Active” setting will automatically be disabled after the specified date and the system will not allow party bookings that would occur past that date.

NOTE: *If future bookings already exist for the Station, the date cannot be earlier than the date of the latest party using that Station.*

- **Name** – the name that will be displayed for the individual Station.
- **Station Image** – a picture of the space (or a promotional image) can be uploaded or display.
- **Capacity** – defines the maximum number of party attendees for the space.
(**NOTE:** This number is not the same as the “Number of Guests Included” in the party Package.)
- **Short Description** – displayed as a brief description of the space when scanning available Stations and times in the Customer Portal.
- **Description** – the full description of the space that staff members will be able to see by clicking on the “Station Details” link when booking a party in the Office Portal.

The screenshot shows the 'Edit Stations' window with the 'DETAILS' tab selected. The form contains the following elements:

- Station Is Active:** A checkbox that is currently checked.
- Name:** A text input field containing 'PartyBonanza'.
- Station Image:** A preview of a birthday party photo, with an 'Upload New Image' button and a trash icon.
- Capacity:** A text input field containing '50'.
- Short Description:** A text area with a question mark icon, containing a brief description.
- Description:** A rich text editor with a menu bar (File, Edit, Insert, View, Format, Table, Tools) and a toolbar. The text area contains the following text: 'Birthdays are a special moment in a child's life. We would love to team up with you to make your child's next birthday party the best ever in our area!'.

At the bottom of the window are three buttons: 'Save', 'Save & Close', and 'Close'.

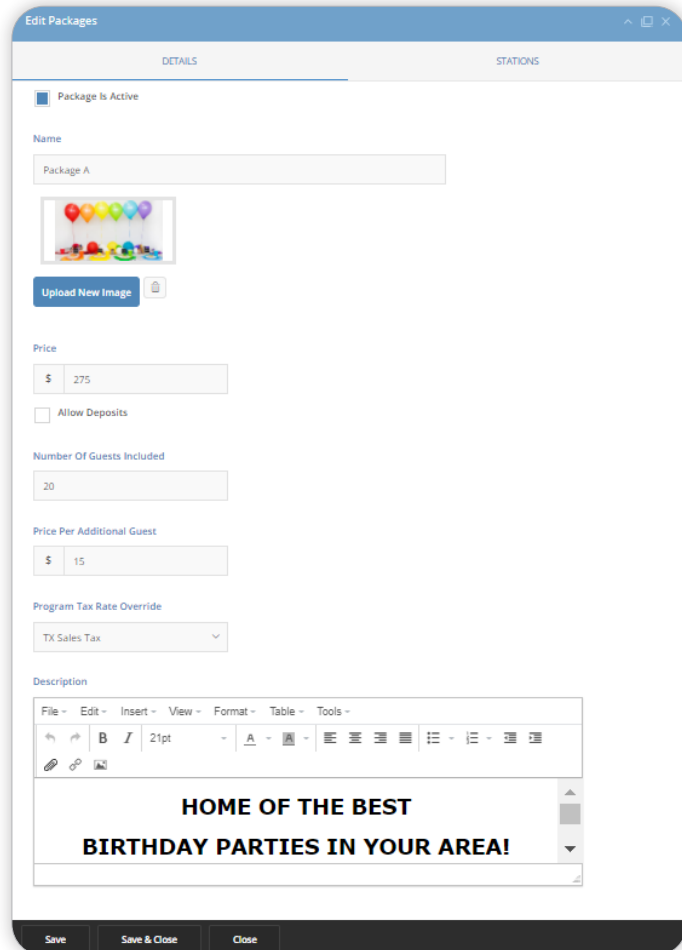
After creating a Station, click on the “Time Slots” tab to attach specific Time Slots to the Station.

Repeat these steps for all available party Stations. Remember to save your settings.

Packages

Under **SETTINGS > PARTIES**, expand the “Packages” menu and click on **New Package**. Then configure the following options:

- **Package is Active** – when enabled, the Package will be displayed as a current option for party bookings.
- **Name** – the name that will be displayed for the individual party Package.
- **Package Image (available only after saving)** – allows you to upload a picture of an a sample party setup or items included in the Package.
- **Price** – the base cost of the Package, including all of the items in the Package description and a set number of guests.
- **Allow Deposits** – if enabled, only charges a deposit when a party is booked. If disabled, customers must pay the full party Package price along with any additional fees when creating the party booking.
- + **Deposit Only Price** – the price this Package will charge if only a deposit amount is immediately required to book a party online. This price cannot be set to \$0.



The screenshot shows the 'Edit Packages' window with the 'DETAILS' tab selected. The 'Package Is Active' checkbox is checked. The 'Name' field contains 'Package A'. There is a placeholder image for the package and an 'Upload New Image' button. The 'Price' field is set to '\$ 275'. The 'Allow Deposits' checkbox is unchecked. The 'Number Of Guests Included' field is set to '20'. The 'Price Per Additional Guest' field is set to '\$ 15'. The 'Program Tax Rate Override' dropdown is set to 'TX Sales Tax'. The 'Description' field contains the text 'HOME OF THE BEST BIRTHDAY PARTIES IN YOUR AREA!' with a rich text editor toolbar above it. At the bottom, there are 'Save', 'Save & Close', and 'Close' buttons.

- **Allow “Pay in Full”** – allows the customer to pay the full party booking price, even if the “Allow Deposits” option is enabled.
- **Number of Guests Included** – the maximum number of guests included in the base price of the Package.
- **Price per Additional Guest** – allows the customer to enter additional guest reservations for an added cost per guest, up to the capacity of the Station.
- **Program Tax Rate Override** – allows you to select a tax rate to be applied to the total party Package cost (including additional guests). If nothing is selected, the system will use whichever tax rate is associated with the Program assigned to party charges in the “Financial” section.
- **Description** – a text area used to describe what this party Package includes and to provide some sales-oriented verbiage.

After creating a Package, click on the “Stations” tab to attach specific Stations to the Package.

Repeat these steps for all available party Packages. Remember to save your settings.

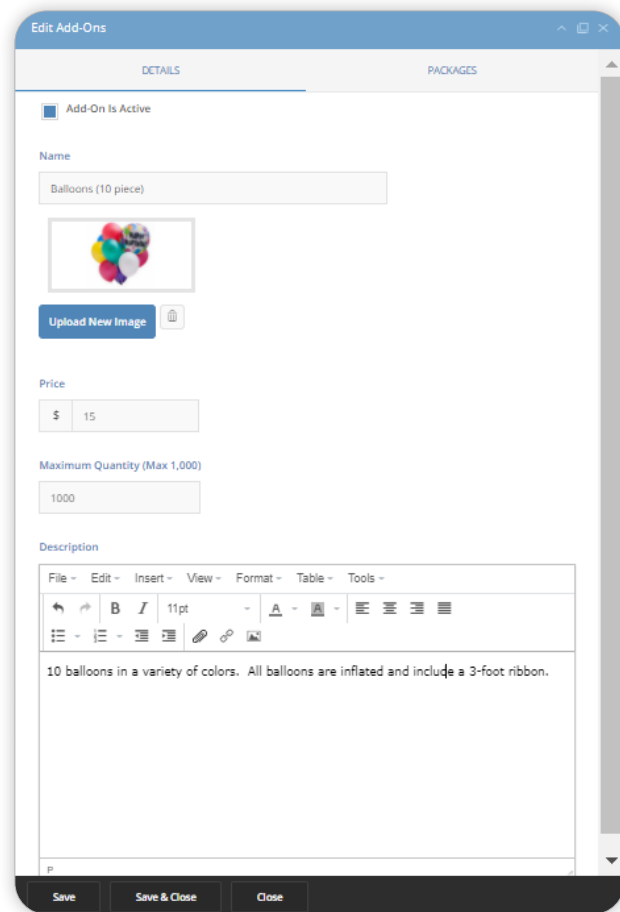
Add-ons

Under **SETTINGS > PARTIES**, expand the “Add-ons” menu and click on **New Add-On**. Then configure the following options:

- **Add-on is Active** – when enabled, the add-on will be displayed as a current option for party bookings.
- **Name** – the name that will be displayed for the individual add-on.
- **Add-on Image (available only after saving)** – allows you to include a picture of the item which will be displayed on the Customer Portal.
- **Price** – the cost of the described item.
- **Maximum Quantity** – establishes an upper limit to the quantity of the add-on that can be purchased per party booking.
- **Description** – the text displayed next to the add-on to describe the item in more detail.

After creating an add-on, click on the “Packages” tab to attach specific Packages to the add-on.

Repeat these steps for all available party add-ons. Remember to save your settings.



The screenshot shows the 'Edit Add-Ons' window with the 'DETAILS' tab selected. The 'Add-On Is Active' checkbox is checked. The 'Name' field contains 'Balloons (10 piece)'. The 'Price' field is set to '\$ 15'. The 'Maximum Quantity (Max 1,000)' field is set to '1000'. The 'Description' field contains the text: '10 balloons in a variety of colors. All balloons are inflated and include a 3-foot ribbon.' There is an 'Upload New Image' button and a preview image of balloons. The bottom bar has 'Save', 'Save & Close', and 'Close' buttons.

Financial

Under **SETTINGS > PARTIES**, expand the “Financial” menu and configure the following options:

- Select a Program to track party income. This Program will be applied to all auto-created charges related to party bookings.
- Select a Charge Category to track party income. This Charge Category will be applied to all auto-created charges related to party bookings.

Remember to save your settings.

Other

Under **SETTINGS > PARTIES**, expand the “Other” menu and configure the following options:

- **Waiver Requirement Notification** – This is an area designated for custom acknowledgment text. **NOTE:** *This is not a full policy agreement, and is not intended to contain your full waiver text. However, all customers must agree to this text before they can book a party online.*
- **Lead Time for Online Bookings** – The “Lead Time” establishes the window for how many days from the current date parties can be booked. For example, setting the value to “2” days would not allow bookings within 48 hours.
- **Booking Confirmation Email** – The “Booking Confirmation Email” template allows you to customize the confirmation email sent to party contacts.
 - + **BCC** – the email address(es) entered here will receive a copy of the Booking Confirmation Email. If you are entering multiple addresses, be sure to separate them with a semicolon (;).

- + **Email Subject** – the subject that will be assigned to the Booking Confirmation Email.
- + **Email Body** – the text of the Booking Confirmation Email that will be received by the party contacts. Variables included in the text of the email will be replaced by the appropriate information based on the booking details.
 - Click the “Email Variables” help link (?) for more information about available variables.

Remember to save your settings.

Other

Waiver Requirement Notification

I understand that EACH guest must have a waiver signed and turned in before they can participate. In the case of minors, a parent or guardian must complete and sign the waiver.

Lead time for Online Bookings

2 Day(s)

Booking Confirmation Email

Bcc (Multiple addresses should be separated with a semicolon ;)

Email Subject

Party Booking Confirmation

Email Body ?

File Edit Insert View Format Table Tools

[[family_first]] [[family_last]],

This is a confirmation message for your recent party booking.

When:

[[party_date]] [[party_time]]

Where:

[[location_name]] - [[party_station_name]]
 [[location_address_1]] [[location_address_2]]
 [[location_city]], [[location_state]] [[location_postal_code]]
 [[location_phone]]

Contact:

Save Party Settings

★ Enabling Parties in the Customer Portal / Mobile App

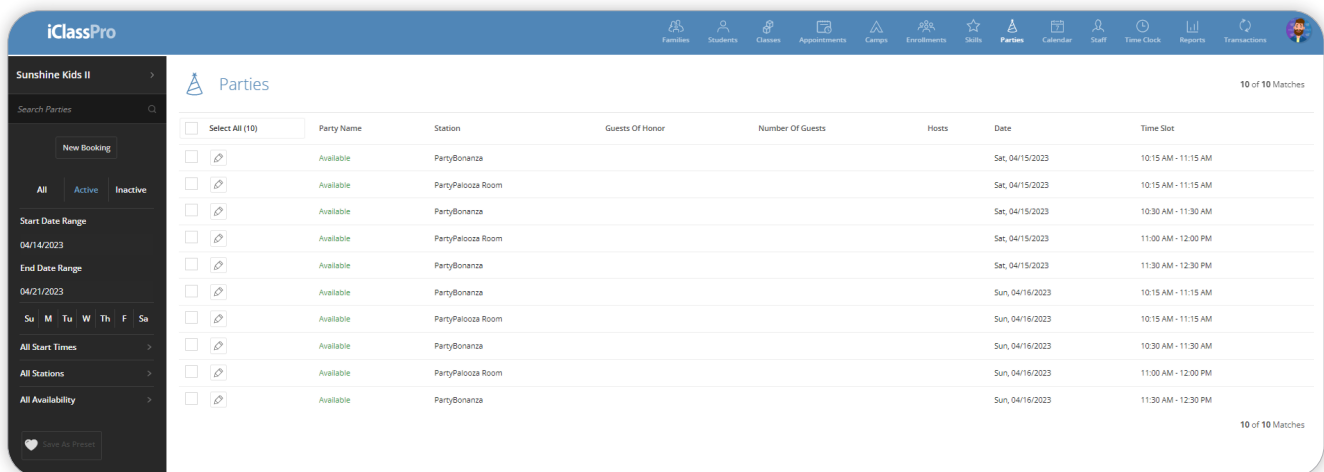
To allow your customers to book a party via the Customer Portal/Mobile App, navigate to **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > GENERAL SETTINGS** and enable the option to “Show Parties And Allow Visitors To Register For Them”:

The screenshot displays the 'Sunshine Kids II' interface. On the left is a dark sidebar with a menu including: Business Information, Billing Information, Locations, Uploaded Files, Transactions, Setup, Skills, Parties, Staff Portal, Customer Portal (highlighted), Settings, Staff, and Other Settings. The main area is titled 'Customer Portal' and shows 'Other Settings'. A sub-section 'General Settings' is expanded, revealing a list of 'General Options'. Each option has a checkbox. The option 'Show Parties And Allow Visitors To Register For Them' is checked and enclosed in a red rectangular box. Other options include 'Enable Mobile App', 'Allow Visitors To Create New Accounts Online', 'Show Classes And Allow Visitors To Register For Them', 'Show Appointments And Allow Visitors To Register For Them', 'Show Camps And Allow Visitors To Register For Them', 'Show Student Punch Card Passes', 'Show Class/Camp/Party/Appointment List If Not Logged In', 'Show FULL Or OPEN Instead Of Number Of Openings', 'Show Class/Camp Levels', 'Show Class/Camp/Appointment Instructors', 'Hide Class Start Date If The Start Date Is In The Past', 'Show Tuition Amounts', and 'Show Full Class/Camp/Appointment Descriptions If Not Logged In'.

★ Viewing and Booking Parties

From the Office Portal

Navigate to the **PARTIES** page. From here, you can see all of the bookings created by your party Stations and Time Slots. You can use the filters on the left to see availability by Station, time, date, or day of the week. Once you book a party, you will be able to locate it by searching for the party name in the **Search Parties** field.



The screenshot shows the iClassPro interface with the 'Parties' page selected. The left sidebar contains filters for 'New Booking', 'All', 'Active', 'Inactive', 'Start Date Range', 'End Date Range', 'All Start Times', 'All Stations', and 'All Availability'. The main table displays 10 matches of available party slots.

Select All (10)	Party Name	Station	Guests Of Honor	Number Of Guests	Hosts	Date	Time Slot
<input type="checkbox"/>	Available	PartyBonanza				Sat, 04/15/2023	10:15 AM - 11:15 AM
<input type="checkbox"/>	Available	PartyPalooza Room				Sat, 04/15/2023	10:15 AM - 11:15 AM
<input type="checkbox"/>	Available	PartyBonanza				Sat, 04/15/2023	10:30 AM - 11:30 AM
<input type="checkbox"/>	Available	PartyPalooza Room				Sat, 04/15/2023	11:00 AM - 12:00 PM
<input type="checkbox"/>	Available	PartyBonanza				Sat, 04/15/2023	11:30 AM - 12:30 PM
<input type="checkbox"/>	Available	PartyBonanza				Sun, 04/16/2023	10:15 AM - 11:15 AM
<input type="checkbox"/>	Available	PartyPalooza Room				Sun, 04/16/2023	10:15 AM - 11:15 AM
<input type="checkbox"/>	Available	PartyBonanza				Sun, 04/16/2023	10:30 AM - 11:30 AM
<input type="checkbox"/>	Available	PartyPalooza Room				Sun, 04/16/2023	11:00 AM - 12:00 PM
<input type="checkbox"/>	Available	PartyBonanza				Sun, 04/16/2023	11:30 AM - 12:30 PM

To book a new party, staff members can use search filters to find an available Time Slot to edit or jump straight to the “New Booking” button.

1. Select a **Station** for the party. To see the description for the selected Station, click on the orange help button.
2. Choose the **Date** and **Time Slot** from the drop-down menus. Only available dates and times will populate.

3. Enter a **Party Title** for quick reference.
4. Enter the **Number of Guests**.
5. Attach a **Family**. A family is required to track financials.
 - Staff can search for existing Families by using the guardian's first or last name, phone number, or email address. To choose a family from the results, click the word "Select" to the left of the family name in the results.
 - If the family does not yet have an account, click the **New Family** button to create a brief family record by entering the guardian's first and last name, phone number, and email address. Once you have entered all necessary details, click **SAVE**.

NOTE: *If a duplicate primary email address is detected that is attached to the Primary Guardian, staff will not be able to save changes until this email address has been updated.*

- + *If a duplicate non-primary email address is detected for ANY guardian, the system will present a warning but will allow staff to override the warning and save changes if needed.*

6. (Optional) Enter a **Person of Honor/Honoree**.
 - On existing families, you can choose an existing student from that family by clicking "Add as Honoree" to the right of the student record displayed.
 - If the Honoree is not listed in the Family section, use the **Add Honoree** button to create one.

7. Fill out the **Contact** section to note who to speak with about the party arrangements. The confirmation email will be sent to the email address provided here once the party is saved. **NOTE:** If you selected an existing family, this area should pre-populate based on the family record. However, you will be able to edit the contact information linked to the party. (Editing the information here will not affect the permanent family record.)
8. Enter any **Customer** or **Staff Notes** regarding the booking. Customer notes will print on booking forms and will be displayed in emails.
9. Choose a **Package**. For more information, click on Details.
10. Include any **add-ons**. For more information, click on Details.
11. Select the **Hosts** (staff members) who will be responsible for hosting the party.

Party Details :: Norma Clegg's 15th Birthday

Station ? *

PartyPalooza Room

Date *

04/15/2023

Time Slot *

11:00 AM - 12:00 PM

Party Title *

Norma Clegg's 15th Birthday

Number of Guests (Station capacity: 50) *

15

Family

Search Families

New Family

Primary Guardian: Norman Clegg | 903-555-1375 | dave+2@iclasspro.com

- Nadine Clegg | Female | 05/06/2017 | (Age: 5y)
- Norm Clegg | Male | 06/29/2014 | (Age: 8y)
- Norma Clegg | Female | 05/02/2008 | (Age: 14y)

Add as Honoree

Add as Honoree

Add as Honoree

Person of Honor

- Norma Clegg | Female | 05/02/2008 | (Age: 14y)

Edit

Remove

Add Honoree

Contact

First Name *

Norman

Last Name *

Clegg

Phone *

903-555-1375

Email *

txcleggy@demo.com

12. **Review the party totals.** This section breaks down the price into the Package fee, additional guests, add-on items and any taxes charged.
13. **Save the party.** If you do not save the party booking, it will be lost when you close the booking window.
 - (Optional) Saving a party booking opens a prompt asking if you wish to **send the Booking Confirmation email**. When an email is sent, it will be recorded in the Booking Confirmation details.
14. Create a **New Charge** for the full party price from the Ledger section. Parties use the pre-selected Program and Charge Category, the pretax amount and a tax dropdown to create the charge. The tax does not calculate until the line item is added to the charge or the charge is saved.
 - [Click here for more information about manually creating a charge for a Party.](#)
15. Create a **New Payment** for the deposit or full price.

From the Customer Portal / Mobile App

One of the many perks of the Party Booking Management feature is that it moves the entire party booking experience into a guided booking process through the Customer Portal/Mobile App.

1. Click the **BOOKING** button at the top of the screen (Customer Portal), or from the actions bar at the bottom of the screen (Mobile App). This will take you to the “Booking” screen, asking which type of Booking/ Enrollment you wish to create:

- If “Show Class/Camp/ Party List if Not Logged In” is **disabled** under **SETTINGS > CUSTOMER PORTAL > OTHER SETTINGS > GENERAL SETTINGS**, customers will be asked to confirm whether they are a current customer.
 - + If they choose **YES**, they enter their email address/ password and continue to the party booking process.
 - + If they choose **NO**, **CREATE ACCOUNT**, they are taken through the account creation process.
- If this setting is **enabled**, they will be allowed to complete steps 2-5 below before they are prompted to log in or create an account.

The screenshot shows a mobile app interface for the 'Other Party Details' step (Step 5) of a booking process. At the top, a progress bar indicates five steps: 1. Apr 30, 2023; 2. 10:15 AM - 11:15 AM; 3. Package; 4. Add-ons; and 5. Other (highlighted). The form is titled 'Step 5 Other Party Details' and contains the following sections:

- Party:**
 - Name of Party: * (Text input: Norman Clegg Family, with a note: (as: 'Monks Family' or 'Jaguars Baseball Team'))
 - Number of Guests: * (Text input: 15, with a note: Maximum capacity: 50)
- Contact:**
 - Who should we contact with any information regarding this party? (Text input: Norman Clegg, with a note: FIRST NAME LAST NAME)
 - Phone: * (Text input: 903-555-1375)
 - Email: * (Text input: clegw43@classpro.com)
- Guest(s) of Honor:**
 - The most important guest(s) at an occasion (e.g. birthday girl at a birthday party):
 - Add Guest of Honor (Button)
- Additional Information:**
 - Let us know of any special needs or any information regarding your order.
 - (Text input area)
- Agree to waiver requirement:**
 - ☒ I understand that EACH guest must have a waiver signed and turned in before they can participate. In the case of minors, a parent or guardian must complete and sign the waiver.

A blue 'Continue' button is located at the bottom of the form.

2. Select a **Date** for the party.
3. Select an available **Time Slot**.
4. Select a **Party Package**.
5. Select any **add-ons**, then click CONTINUE.

***NOTE:** If no add-ons are available for the selected Party Package, this step will not be shown.*

6. Enter **Other Party Details**.

- Number of Guests
- Group/Party Nickname
- Contact – Contact information for the person booking the party.

***NOTE:** This should automatically fill in based on the primary guardian, phone, and email for the family that is logged in.*

- People of Honor
 - + Click ADD PERSON to enter details of the person of honor
- Additional information – Enter any special needs/information regarding the party booking.
- Agree to the Waiver Requirement.

***NOTE:** the customer must agree to the Waiver Requirement before the option to CONTINUE will be enabled.*





7. Click CONTINUE to bring up the **Booking Overview**.
8. On the Overview page, review the party details and click **PAY NOW!** to complete the booking process.

***NOTE:** Depending on your Party Settings, customers can choose to pay either just the deposit or the full amount.*

Notifications

When a party is booked through the Customer Portal/Mobile App, a confirmation email will be sent to the email address entered in the contact details for the family, as well as to the email(s) listed in the BCC settings under **SETTINGS > PARTIES > OTHER**.

A notification will also appear in Online Activity for both the payment and the booking.

<input type="checkbox"/>	 	04/17/2023	Clegg, Norman	PAYMENT	Online payment made for the amount of \$ 319.34
<input type="checkbox"/>	 	04/17/2023	Clegg, Norman	PARTY	New Party Booking on 04/29/2023 10:30 AM - 11:30 AM

★ Miscellaneous Topics

Transferring Party Dates

If a party needs to be transferred to a different date/time, follow these steps to remove the old party booking and create a new one using the new details:

1. Navigate to the **PARTIES** page.
2. Use the filters or search function to **Locate** the existing party.
3. Click the pencil/edit icon to **Edit** the existing party details.
4. Choose the new **Station, Date** and **Time Slot**.
5. Confirm the **Party Package** choice and **add-ons**.
6. Review the **Party Totals** for necessary additional charges or payments.
7. **Save** the changes to the booking.

***NOTE:** When editing an existing party booking, the system will verify details as they are changed to ensure that selected options are still valid based on the new date/party Station/Time Slot.*

Canceling a Booked Party

1. Navigate to the **PARTIES** page.
2. Use the **filters** or **search** function to locate the existing party.
3. Click the pencil/edit icon to **edit** the existing party details.
4. Click the red “Delete” button at the bottom of the window to **delete** the booking.

NOTE: Following these steps will not remove any charges or issue any refunds from the family ledger; it simply deletes the information from the party Time Slot and makes it available again for booking. Staff members will still need to manually adjust any ledger charges and/or issue any refunds in accordance with your party policies.

Party Details :: Nadine Clegg's 6th Birthday Party

Station ? *

PartyBonanza

Date *

04/29/2023

Time Slot *

10:30 AM - 11:30 AM

Party Title *

Nadine Clegg's 6th Birthday Party

Number of Guests (Station capacity: 50) *

10

Family

Search Families

New Family

Primary Guardian: Norman Clegg | 903-555-1375 | dave+2@iclasspro.com

Nadine Clegg | Female | 05/06/2017 | (Age: 5y)

Norm Clegg | Male | 06/29/2014 | (Age: 8y)

Norma Clegg | Female | 05/02/2008 | (Age: 14y)

Add as Honoree

Add as Honoree

Add as Honoree

Person of Honor

Save

Save & Close

Print

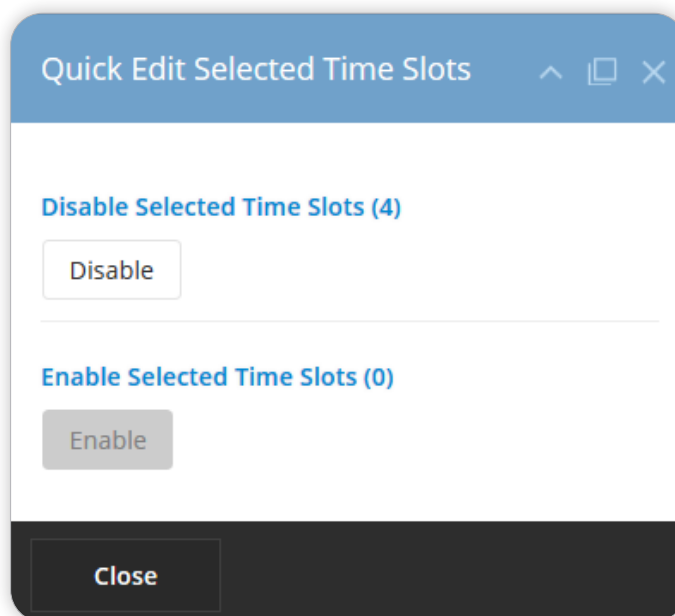
Delete

Close

Disabling / Enabling Specific Party Time Slots

To disable specific party Time Slots due to holidays or other closures, follow the instructions below.”

1. Go to the **PARTIES** page.
2. Adjust the **filters** on the left-hand side of the screen and/or the **view quantity** to display the party Time Slots you wish to edit on one page.
3. **Check the boxes** next to the party Time Slots to be edited.
4. Click on the **Quick Edit** icon (pencil) at the bottom of the page.
5. In the new Quick Edit window, click **Disable**.
6. The selected Time Slots will no longer be available for booking.
NOTE: To re-enable a Time Slot that has been disabled, follow steps 1-5 above with the following exceptions:
 - On Step 2, set the filter options to show only **Inactive** Time Slots.
 - On Step 5, click **Enable** in the Quick Edit window.



Printing Party Booking Information

To print the information for one or more booked parties, follow the instructions below.

1. Go to the **PARTIES** page.
2. Adjust the **filters** on the left-hand side of the screen and/or the **view quantity** to display the party Time Slots you wish to print on one page.
3. Check the **boxes** next to the bookings you want to print.
4. Click on the **Printer icon** at the bottom of the page.
5. From the new window, click **Print**.
6. The system will generate a separate “**Party Registration Form**” for each party booking.

Party Registration Form

Date: **Sat 04/29/2023** Time: **10:30 AM - 11:30 AM**
 Station: **PartyBonanza**
 Party Name: **Nadine Clegg\'s 6th Birthday Party**
 Party Host:
 Staff Notes:
 Number of Guests: **10**
 Party Package: **Package A**
 Add-Ons:
 Name: **Large Pepperoni Pizza** Quantity: **1**
 Name: **2 Liter Coke** Quantity: **1**
 Name of Responsible Party: **Norman Clegg**
 Contact Phone: **903-555-1375**
 Contact Email: **dave+2@iclasspro.com**
 Name: **Nadine Clegg** Age: **5 Years 11 Months** (As Of Mon 04/17/2023) DoB: **Sat 05/06/2017** Gender: **F**
 Customer Notes:

PRO | TIP

Print this form and keep it in a binder so it can be easily referenced by staff at the front desk!

Financial Reports

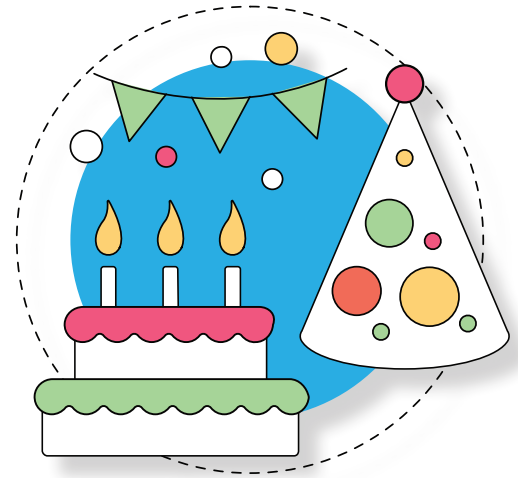
Parties booked through the Party Booking Management feature will display on regular iClassPro financial reports using the Program and Charge Category selected under **SETTINGS > PARTIES > FINANCIAL SETTINGS**. The following reports will be particularly useful for tracking charges and payments.

1. **Category List Report (FIN-6)** – details family information, charges, taxes, and balance due. Using a unique financial Charge Category for your party bookings will make it easier to limit this report to only reflect financial transactions linked to parties.
2. **Program Deposit Split Report (FIN-4)** – gives a summary of the total amount of money collected by financial Program. Using a unique financial Program for your party bookings will make it easier to limit this report to only reflect financial transactions linked to parties.

Congratulations!

You're now a PRO!

You have successfully learned how to configure the Party Booking Management feature, create a booking, and enable parties to show in the Customer Portal so your customers can create their own party bookings online! Feel free to refer to this guide any time you need to create new party Timeslots, Packages, or bookings.



Questions?

Please feel free to reach out to our helpful support team [HERE](#)!

