Get started with eabo

User Guide

mbH©

By klick on the page number you will get to the topic

In general

With e-abo you can organise your offer with ease and efficiency.

You will need your **computer** to enter the master data and for analysis. Use your **smartphone** to organise your classes and attendance lists on site.

No matter where you work from, you are always up to date with your class organization.

e-abo is multi-client capable. This means that if you are teaching with other providers who use e-abo, you can easily switch to these providers within the app and access the classes (with the appropriate authorization).

You no longer need to issue an invoice for participants, all billing information is located in the app. As soon as you confirm that the invoice has been paid, an invoice / confirmation will automatically be sent to the participant via email.

Important: Even participants who do not use the app can be fully integrated into e-abo administration.

The most important steps to get started with e-abo

1. Complete your company profile

2. Enter tariffs

3. Enter classes - and assign tariffs

4. Enter participants

5. Enter bookings for participants

Company Profile

Complete details in the company profile, if relevant. Some of this information appears in the app as well as on the invoice/confirmation. See table.

	App	Invoice	Comment
Company profile	X	X	
Company logo	X	X	
Website	X	X	
Company description	X		
Email	X		
Phone number	X		
Address 1	X	X	
Address 2	X	X	
ZIP Code	X	X	
City	X	X	
Region/State/Province	X	X	
Country	X	X	
Time zone			Ensure that correct location is selected
Currency		X	Relevant for tariffs

	App	Invoice	Comment
VAT		X	If applicable
VAT No.		X	If applicable
Tax No.		X	If applicable
Textfield on invoice		X	If applicable
Account holder	X		This information appears in the participant's booking. (My classes | touch on booking)
Name of bank	X		
IBAN	X		Thus the participant has the payment information directly in the app.
BIC	X		
Paypal Konto	X		
QR-Code* & URL	X		Website / Flyer / Studio

*Your QR code contains your e-abo profile link. When scanning/typing the QR code, a landing page with your information will be opened for participants without an app. Participants who have already installed the app and registered will be directed to your provider profile in the app.
Here you can find more info on how to integrate it into your website!

QR-Code

Your personal QR Code & URL can be used in many ways.

On your website

Place your QR code on your website.
- Interested parties scan the QR Code
- Your personal e-abo landing page* will open with information on installing e-abo.
- A new scan leads to your offer in the e-abo app

If you have the possibility, link the QR Code to the URL. The advantage of this is that when you open your website on your smartphone by 'tapping' the QR code, your e-abo landing page will open directly.

Interested parties who have already installed e-abo can reach your offer directly in the app by scanning/tapping the QR code.

In your school / studio

Print out your QR Code and place it in your school/ studio.

Application example:
New customers come to your school / studio for the first time.
- Scanning the QR Code
- Register yourself
- Make a course request
- or you can buy your offer directly via e-abo Pay!

The new customer is entered directly in your participant database. A manual entry is not necessary.

E-Mail, Flyer, Miscellaneous

Place your QR code (link the URL) in your email signature.

Application example: email
When answering e-mail inquiries, you can ask new customers directly to download the e-abo app by scanning the QR code.

Application example: Flyer
Place your QR code additionally on your flyers, business cards etc.

Miscellaneous
Place your QR code in social media postings, on your Facebook profile etc.

*Your personal e-abo landing page is directly at your disposal. You do not need to do anything.

Tariffs | General

e-abo provides you with various tariff types with which you can manage a wide range of offers. The tariffs (your prices) are the basis for class registration and determine which classes can be attended with a booking.

A tariff may
- be assigned to several classes
- be created in such a way that it can be booked without class assignment

When creating the booking, the conditions can be adjusted depending on the tariff
- Number of entries
- Validity (start and end date)
- Price

So that you have full flexibility and can respond to different requirements.

The following fields
- Publish tariff in App-search*
- Tariff can be booked / purchased online without class assignment

control whether the tariff is published in the app search and whether a tariff can be booked/bought without class assignment.

Examples:

☑ Publish tariff in App-search
☑ Tariff can be booked / purchased online without class assignment.

Means for the customer:
- the tariff is **visible** - is displayed in the App-search
- can select the tariff for a class request
- can buy tariff (e-abo Pay!)
- can buy classes with tariff (e-abo Pay!)

As provider/instructor you can:
- create a booking without class assignment
- make a normal booking

☑ Publish tariff in App-search
☐ Tariff can be booked / purchased online without class assignment.

Means for the customer:
- the tariff is **visible** - is displayed in the App-search
- can select the tariff for a class request
- can buy classes with tariff (e-abo Pay!)

As provider/instructor you can:
- make a normal booking

☐ Publish tariff in App-search
☐ Tariff can be booked / purchased online without class assignment.

Means for the customer:
- the tariff is **not visible** - is not displayed in the App-search

As provider/instructor you can:
- make a normal booking

☐ Publish tariff in App-search
☑ Tariff can be booked / purchased online without class assignment.

Means for the customer:
- the tariff is **not visible** - is not displayed in the App-search

As provider/instructor you can:
- create a booking without class assignment
- make a normal booking

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*This possibility is used for individual pricing, for example special conditions for family members. As a provider/instructor these tariffs will appear in the app search.

Tariffs | Multiple Ticket

This can be perfectly used if you offer multi tickets (e.g 90 days pass). For example your offer is valid for 90 days with 10 entries.

	Content	Example
Title	Short description	90 day pass - 10 entries
Description	Details	Not transferable to others
Tariff can be booked without class assignment	Active / Inactive	Determines whether a booking can be created without course assignment. The participant can attend all classes that include this tariff.
Tariff can be purchased online (PREMIUM PLUS)	Active / Inactive	Controls whether a booking can be created without class assignment by the provider. With providers who use e-abo Pay!, the customer can buy the tariff directly).
Price	Total class price	150
Maximum numbers of entries (0=unlimited)	Number of entries	10
Number of days from booking	The booking is valid for xx days according to the start date	90

Tariffs | Dynamic Tariff

You offer classes with fixed durations (e.g. quarterly classes)? Then the Dynamic Tariff is just right for you.
The total price per class (price per lesson x number of lessons in the class) is automatically calculated and suggested when the booking is created.

When entering a running class, the price is calculated based on the remaining dates.

	Content	Example
Title	Short description	Price per class
Description	Details	Class price according to number of entries per quarter
Price per lesson	Price per lesson	15

IMPORTANT: This tariff can only be assigned to classes with determined durations.

Tariffs | Subscription with automatic renewal

A subscription is automatically renewed under same conditions (contract with participant). The subscription is **not automatically renewed** when the entries **are used up**. Subscriptions **cannot be paused**. Subsequent adjustments to the conditions have no influence on existing contracts.

	Content	Example
Title	Short descripbion	Half year - subscription - valid 180 days
Description	Details	When booking, the subscription is valid for 180 days and can be terminated for the first time after 360 days. The notice period is 10 days before the end of the contract.
Tariff can be booked without class assignment	Active / Inactive	See multiple card
Tariff can be purchased online (PREMIUM PLUS)	Active / Inactive	See multiple card
Minimum period	Minimum duration	360 (2x 180)
Notice period	It can be terminated up to xx days before expiry	10
Price	Price	900
Maximum number of entries (0=unlimited)	Number of entries	30
Number of days from bookings	According to the start date, the booking is valid xx days	180	if not terminated, the subscription will always be extended for another 180 days.

The subscription can be terminated by the participant according to conditions in the app. If the participant terminates, you will receive an e-abo message, the participant will receive an e-abo message if you terminate. The termination is visible in the booking.

Important: When creating a booking, only the 'start date' and the 'number of entries' can be adjusted.

Tariffs | Valid for a specific period of time

You can offer a special rate for a dedicated period of time and assign it to various classes. Bookings are only valid for this period.

	Content	Example
Title	Short descripbion	Summerspecial
Description	Details	Entries can only be consumed during this period.
Tariff can be booked without class assignment	Active / Inactive	See multiple card
Tariff can be purchased online (PREMIUM PLUS)	Active / Inactive	See multiple card
Price	Total class price	140
Maximum number of entries (0=unlimited)	Number of entries	8
Valid from	Start date	01.07.2019
Valid until	End date	30.08.2019

Important: When creating a booking, only the 'price' and the 'number of entries' can be adjusted.

Classes | General

You can enter different offers. From weekly classes, workshops, quarterly classes and private classes (individual classes).

Different instructors and venues can be assigned to the classes. Absences can be entered by class. If an appointment has expired, it will be deleted automatically.

You can always check how well your class is being used. Click on the class title in the class list and all information about the class will be displayed, such as the number of participants per date (past / future) and who was entered in the app on which date as a deputy for a date.

PREMIUM MODULE

The class is limited for a certain number of participants? Then you can optimally organize this with the Premium Module.

Limit the **number of participants** and enter how many hours the **cancellation deadline** is. This way, the course capacity can be optimized and you always have an overview of the occupancy of single class dates.

Participants which do not cancel the registration in time, will be marked as 'present'. Participants on the 'appointment waiting list' move up as soon as a participant cancels a date.

Classes | Entry Screen

	Content	Comment
Title	Input required	Enter the class name
Description	Input required	Describe your offer
Category	Input required	The category icon appears with the classes
Instructor	Pre-selected	As a provider you are directly selected as a instructor, further instructors can be invited and assigned
Interested people can send an enquiry	Pre-selected	Users of Premium Plus can activate this item if the class cannot be purchased directly in the app, but a request has to be made
Class can directly be booked (Premium Plus)	Pre-selected	Only Premium Plus
Publish course in App-search	Pre-selected	The class appears in the App search
Non attendance rules| Deadline (Premium)	Cancellation time	Determines until when participants can optionally cancel before the class starts
Non attendance rules	Maximum number of participants (Premium)	Number of participants	If the maximum number is reached, the appointment waiting list is activated
Tariffs	Make a selection	Activate the tariffs that apply with this class
Individual dates	Private classes	Week day, time, venue are assigned when the booking is made
Fixed period	Enter dates	Defines the duration of the class e.g. for private classes.
Selected appointments only	Combination with 'Fixed period'	Enter classes with specific dates for always the same or different weekdays.
Weekday	Start time - End time| Class location	Input required	Entry on which day, at which time, at which location the class takes place - except for 'Individual dates'.
Absences	Optional	Enter absences, these are published in the App

Classes | Examples

Examples	A	B	C	D	E	F
Titel	X	X	X	X	X	X
Description	X	X	X	X	X	X
Category	X	X	X	X	X	X
Instructor	X	X	X	X	X	X
Interested people can send an enquiry	X	X	X	X	X	X
Class can directly be booked (Premium Plus)	O*	O*	O*	O*	—	O*
Publish course in App-search	O	O	O	O**	O	O
Non attendance rules	Deadline (Premium)	O	O	O	O	O	O
Non attendance rules	Maximum number of participants (Premium)	O	O	O	O	O	O
Tariffs	X	X	X***	X***	X	X
Individual dates	—	—	—	—	X	—
Fixed period	—	—	X	X	—	X
Selected appointments only	—	—	—	X	—	O
Weekday	Start time - End time	Class location	X	X	X	X	—	X
Absences	O	O	O	O	—	—

X = Entry or selection required **| O =** Entry or selection is optional

Example A: Weekly class | Takes place on the same day and at the same time.

Example B: Classes take place several times a week | Suitable for online classes or classes with identical participants.

Example C: Weekly class - Fixed period (Example quarterly classes) **|** Like example A - but within a time period.

Example D: Class which only takes place on certain dates | Always on the same or different weekdays. Individual selection of the appointments. For example, every second Saturday of the month.

Example E: Private lessons | Creation of the template for private classes, these will be created directly in the app.

Example F: Workshops | Individual entry of workshops in a certain time period on certain weekdays.

* Is preselected when Premium Plus is activated **| **** Class is not displayed in the Search function of the app | ******* The dynamic tariff can be selected here

Participants | Entering & Registration

There are different ways to enter participants in e-abo. It is important that the 'link' to your school takes place.

- Participants without an e-mail address can also be managed with e-abo.
- We recommend that only minimal participant data be recorded. The participant can complete his profile independently in the app (GDPR).
- As soon as the participant is registered, you can immediately create a booking (independent of the participant registration).

Initial entry on the web | My e-abo

For an initial entry of your customer data we also offer an **upload possibility**.
Send an e-mail to heike@e-abo.com.

Enter the participants

1. First name / last name / e-mail address
2. After all participants have been entered, you can request the data exchange from the participants (they will receive an invitation to e-abo).

Participant makes class enquiry or buys your offer online

1. Participant scans your QR Code

2. Comes on your e-abo landing page.
3. Installs e-abo, registers & logs in.
4. Scann / tips on the QR Code.
5. Makes a class request or buys your offer online.
6. The participant is registered and added to your account.

Enter participants in the app

Participants can be entered individually in the app, e.g. if a person contacts you and wants to come to a class.
App | Participant |+|

Enter participant

1. First name / last name
2. e-mail address (optional) -Tick 'invite to e-abo' is set.
3. Participant receives Invitation to e-abo and registers.
4. After registration the participant is linked to your school.

Recommendation: Inform your participants in advance by e-mail that you are using e-abo.
In the web under Help you will find instructions for the change of your class organisation.

Participants | Helpful Hints

Data exchange requested from participant(s)

The e-mail address is the identity between the participant and your school. It is important that the participant registers with the same e-mail address so that the data can be synchronized.

The data exchange can be

- Individual for each participant |web | Edit | Invite participants by email |
- For all participants |web | Participant overview | Button: Request data exchange for all|

requested at any time.

Participants without e-mail address

Enter the participant with the information you need. The registration with first name and surname can be done in the app. Extended data can be added on the web.

Complete profile

Please ask the participants to fill in their user profile completely. This way you will receive all data and the course invoice/confirmation for the participant will be created with the correct information.

Instructor | General

In addition to your provider account you can invite another instructor. If you need additional instructors, they can be purchased individually (web|license). Instructors can be invited with different roles. The roles can be changed later.

web | Instructor | Invite Instructors

1. Enter the email address.
2. Instructor receives the invitation email and follows the steps in the email.
3. You will receive the information that the instructor is now active
4. Assign the classes to the instructor.

Free text for invoice/confirmation (Info for insurance comp.)

1. Information can be stored for each instructor, which is displayed on the invoice/receipt (for bookings with class assignment). Like e.g. health insurance recognition.
2. For booking(s) without class assignment the text will not be transferred - if you still want the text to appear proceed as follows.
   - Enter the text in the company profile | text field on invoice | this will then be printed on each invoice.

Assign a deputy in the app

Assign a deputy in a few steps:

Classes | Swipe Classes | Touch Scheduler | Swipe Appointment | Touch Deputy | Choose Deputy

As soon as the deputy is assigned, the deputy receives an e-abo message about the assignment. The class will appear immediately in the class overview of the deputy.

The deputy can be removed in the same way.

Instructor | Role Concept

ROLE	AUTHORIZATION WEB	AUTHORIZATION APP	NO ACCESS
ADMIN Ability to do the complete class organization on the web and in the app. However, an instructor with admin rights cannot make adjustments to the company profile, license purchase or instructors.	**CLASSES:** Create | Change | Delete **TARIFFS:** Create | Change | Delete **CLASS LOCATIONS:** Create | Change **PARTICIPANTS:** Create | Change | Delete **ANALYSIS:** All	**CLASS LIST:** Access to all classes **ATTENDANCE LIST:** All **CLASS MANAGER:** All **SCHEDULER:** All **CLASS REQUEST:** For all classes **PARTICIPANTS:** Invite + e-abo message	• Company profile • Instructors • License
NORMAL Can organize the classes assigned to him/her in the app, enter bookings, process class requests and add participants.	**PARTICIPANTS:** Create | Change | Delete **ANALYSIS:** Instructor related	**CLASS LIST:** Classes of the instructor **ATTENDANCE LIST:** All **CLASS MANAGER::** All **SCHEDULER:** All **CLASS REQUEST:** Classes of the instructor **PARTICIPANTS:** Invite + e-abo message	**See Admin-Role and** • Tariffs, Classes, Class locations • No download of the participant data
MANAGE PARTICIPATIONS ONLY Can edit attendance lists for the classes assigned to him/her, add participants with valid bookings to appointments and select a deputy via the Schedule Manager. Instructors with this role cannot add participants and/or create bookings. **This role is ideal if you need to enter a new deputy for a class on an ad hoc basis.**	No access to provider data	**CLASS LIST:** Classes of the instructor **ATTENDANCE LIST:** All **SCHEDULER:** All **PARTICIPANTS:** Reference only	**See Admin-Role and** • **CLASS MANAGER** • **CLASS REQUESTS** • **PARTICIPANTS** invite + e-abo message to all • **BOOKINGS:** General

e-abo App | Dashboard

e-abo is designed to give you quick access to your most important functions, as well as an up-to-date overview of what's coming up.

Header | Here you will find the settings **(1)** & search functionality **(2)**

Profile | Click here for **(3)** for changing provider and here for the **(4)** user and company profile

Tiles (5) - 'Quick access' to the latest information by touching the tile
- Classes | The next class is displayed here - **Touch |** Class overview
- Inbox | The latest message/class request is displayed - **Touch |** Inbox
- My Classes | The next course you are attending is displayed - **Touch |** My Classes
- Waiting List | The next waiting list entry is displayed - **Touch |** Waiting List

Tab Bar (6) | Here you can access all menu items - The tab bar is active on most screens and allows quick switching between menu items

e-abo App | General

In the app, the cells are used in different ways. With **touch** and **swipe** you can get more information and functionalities.

Touch on a cell

Swipe (Wiping from right to left) |

Action Menu | this is located in the header (up arrow - or 3 points)

We recommend to fill in the user profile completely, so that all information is available.

To manage classes, the best way to start is via **the tile | Classes** or **Tab Bar | Classes**

The app has four core areas in which the complete class organization can be handled:

- Class Manager
- Attendance List
- Scheduler
- Participants

Class Manager | 1

In the Class Manager you organize your classes

This is how you get to the Class Manager: Touch Classes | Swipe class | **Touch Class Manager |**

Participant listed| At a glance you see the current situation of participants

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Touch on participant |The current posting is displayed - subsequent adjustments can be made

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Swipe Participant | **Send message**| An individual message can be sent to the participant

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Swipe Participant | **End participation** | The participation for this class is terminated, the booking remains and the participant can be added to another class (New booking | Extend booking)

Touch Action Menu| **Waiting List** | This will take you to the course waiting list. All participants on the waiting list are listed here. You can add and remove participants and create bookings.

Class Manager | 2

Touch Action Menu | **Renew booking - (group)**| You can create a new booking for a whole group. The participants are already pre-selected (de-selection is possible). This function is mainly used for quarterly courses.

Touch Action Menu |**New booking**| Create a new booking for one or more participants.

Touch Action Menu |**Message to all**| Send a message to all listed participants in the class.

Waiting List | Class

The Waiting List for classes is managed manually. Participants can be added to the Waiting List via Class Manager or Class Request.

This is how you reach the Waiting List:

Touch Classes | Swipe class| Touch Class Manager | Touch Action Menu | **Waiting List|**

The Waiting List consists of two areas:

1. Waiting participants: The participants who are already on the Waiting List are listed here.
2. New class requests: New underlined unanswered requests from participants with the remark '**put on waiting list'**

This is how you manage the class Waiting List:

Touch +| Add participant to Waiting List
Swipe Participant **|Touch Booking|** Create a booking for participants - in this class or a new/other class
Swipe Participant **|Touch Get in contact|** Contact participant
Swipe Participant **|Delete|** Delete from Waiting List

Important: The class can be overbooked by the instructor.

Booking | General | 1

Bookings can be created and adjusted from the following areas: Classes — Class Manager — Participant.

There are different statuses of a booking, which are visually displayed in the Class Manager and the Attendance List. This gives you a complete overview of the status of the booking, be it payment, validity, or number of entries.
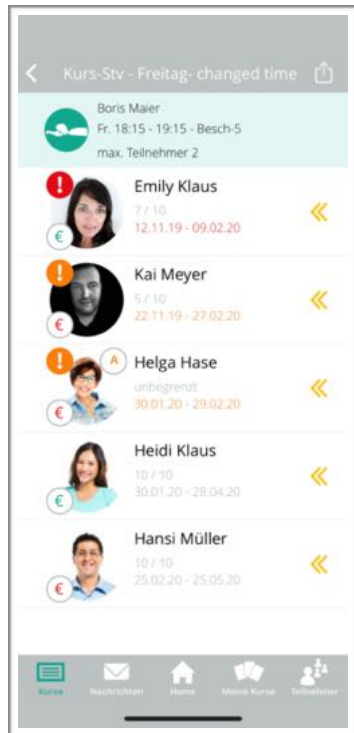
Red circle|Exclamation mark |Booking expired

Orange Circle|Exclamation mark |
Booking expires in 7 days, or contains only 2 entries
The start date of the booking is in the future

Letter A in circle| Participant has a subscription
Green **A** = valid subscription
Orange **A** = valid subscription - terminated as of the effective date
Red **A** = Subscription invalid - terminated

€ **Sign |** Indicates whether the booking has been paid
Red € Sign = Amount pending
Green € Sign = Amount paid

Booking | General | 2

Booking:

Classes **without** compulsory cancellation

An authorization for **xx visits takes place** for the defined period, without a defined date.

The presence is confirmed on site or the participant signs up in advance for appointments.

Example:

Instructor creates a booking: **Card of 10**
The no. of attendances in the booking is | **0/10**

Instructor confirms attendance
The no. of attendances in the booking is | **1/10**

Participant signs up for 5 dates
The no. of attendances in the booking is | **6/10**

Booking:

Classes **with** compulsory cancellation

A **binding reservation** is made for **xx entries** for the defined period. Your presence is confirmed.

The presence is confirmed.

Example:

Instructor creates a booking: **Card of 10**
The no. of attendances in the booking is | **10/10**

Participant logs out on 2 appointments
The no. of attendances in the booking is | **8/10**

The participant has a credit of 2 entries (as long as the cancellation is done within the cancellation period) and can plan this for future dates   .

Booking:

Without class assignment

This type of booking enables participants to sign up for all classes that the tariff allows.

This allows participants to plan their appointments flexibly and to sign on/off for classes with or without compulsory registration.

Example:

Instructor creates a booking: **Card of 10**
The no. of attendances in the booking is | **0/10**

Participant signs up for 5 dates
The no. of attendances in the booking is | **5/10**

In general: Instructor | can make adjustments to past and future attendances. Participant | **cannot** make adjustments to past attendances.

Booking | General | 3

Trigger invoice / confirmation

When a booking is made, the participant receives a message directly in e-abo. If the bank details are entered in the company profile, they will appear in the participant's booking. This eliminates the need for issuing a separate invoice in advance.

After you have checked the receipt of payment you can set the booking to paid in the app (booking details) or on the web (Analysis | Bookings). <u>This will trigger an e-mail to the participant with the invoice/confirmation (PDF)</u>.

The invoice/confirmation, is available as pdf web | Analysis | Bookings| Invoice |

Expiring bookings

Every Friday evening , course instructors (with the authorization to create bookings) receive information about all expiring bookings (validity - or there are only a maximum of two entries left). Before creating a booking, check whether a new booking is created in the meantime. Participants | Swipe Participants | Valid bookings |

- Provider | Gets an overview of <u>all</u> expiring bookings
- Instructor with permission | Admin | Gets an overview of <u>all</u> expiring bookings
- Instructor with permission |Normal | Gets an overview of <u>his/her</u> expiring bookings
- Instructor with permission |Participants only | Receives <u>no</u> information about expiring bookings

Booking | Creation
Class Manager — Participant — Class Request

Class Manager: Touch Classes | Swipe class| Touch Class Manager **|** Touch Action Menu| **New Booking** |

Participant: Touch Participant | Swipe **Booking** |

Class Request: Touch Inbox | Class Enquiry |Touch Participant | Touch Action Menu| **New Booking** |
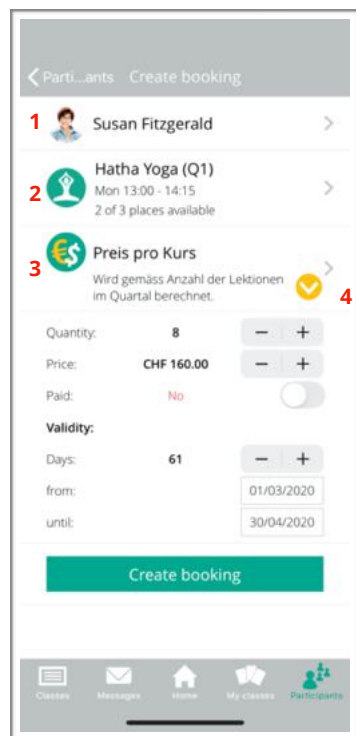
The booking screen is divided into four areas:

(1) Participant:
- *Access via Participants: The participant is pre-selected*
- *Access via Class Manager: One or more participants can be selected.* If several participants are selected, a individual booking with the same conditions is created for each of them.
- *Access via Class Enquiry:* interested party has made an enquiry

(2) Class:
- *Access via Participants:* Choose class
- *Access via Class Manager:* The class is pre-selected
- *Access via Class Enquiry:* The class is pre-selected

(3) Tariff: Selection of the tariff. The tariff may already be suggested in the course request.

(4) Tariff Details: Touch on yellow circle - details are displayed
- Adaptation of the tariff (depending on the tariff) is possible in different areas.

Adjustment of conditions

When creating a booking, individual adjustments can be made to the conditions (according to tariff).
- Quantity
- Price (except subscription)
- Start date
- End date (except subscription)

Helpful Hints:

- Participant appears in the Attendance List
- Participant receives e-abo message about the booking
- Participants can sign in/sign out on dates
- Participant has all information about the booking

Booking | Creation | Private Class

Private classes (bookings) can be created in several ways:

Classes: Touch Classes | **Choose template |**

Participants: Touch Participant | Swipe **Booking|**
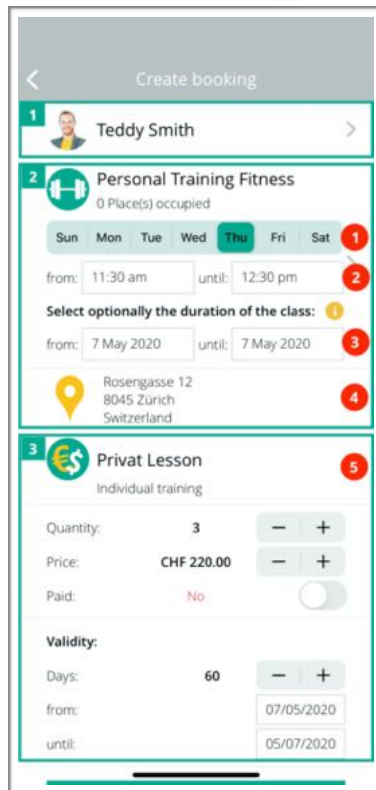
The booking screen is divided into three areas:

1 Participant:
- *Access via Participants: The participant is pre-selected*
- *Access via Class Manager: One or more participants can be selected.* If several participants are selected, an individual booking with the same conditions is created for each of them.
- *Access via Class Enquiry:* interested party has made an enquiry

2 Class Details:
(1) Select the weekday on which the class takes place
(2) Select the time
(3) Optionally, the term of a class can be entered independently of the validity of the booking. More on this on the following pages.
(4) Select the class location if it differs from the standard location

3 Tariff Details:
(5) Tariff: Selection of the tariff. The tariff may already be suggested in the class request.

Class overview

- The class is listed in chronological order
- The class includes the name(s) of the participant(s)

Helpful Hints:

- Participant appears in the Attendance List
- Participant receives e-abo message about the booking
- Participants can sign in/sign out on dates
- Participant has all information about the booking
- In the Class Manager, further participants can be added via 'New booking

Terminate private class:

Once the course is finished, it must be closed via the Class Manager. Class Manager | Action Menu |Terminate privat class. The class is removed from the list.

Booking | Creation | Private Class | Individual date

Example: Plan/book an individual entry for a participant (Classes | Template)

(1) Participant selection

Select one or more participants. A booking with the same conditions will be created for them.

(2) (3) Weekday & Time

Select the day of the week and the time at which the appointment takes place.

(4) Duration of the class

Set the definitive date - Make sure that the **day of the week (2)** matches the **date (4)**.

(5) Tariff / -Details

With touch on the preselected tariff, the tariff can be changed. The tariff details can be adjusted individually.

The class is created for this date. The participant is (for courses with compulsory cancellation) booked directly into the date or listed in the date (participation has to be confirmed).

Important: The duration of the class is independent of the validity of the tariff.

Booking | Creation | Regular Private Class

Example: Create a private class for one (or more) participants on the same day of the week and at the same time. The participant(s) will come to the class on the same day and at the same time every week.

 (1) Participant selection

Select one or more participants. A booking with the same conditions will be created for them.

(2) (3) Weekday & Time

Select the day of the week and the time at which the class takes place.

(4) Duration of the class

The duration of the class is optional entry. If no term is specified, the validity of the tariff determines the class period

In this example, the duration of the class is longer than the validity of the tariff. The class is created and once the booking has expired. You can create a new booking for the participant in this class via Class Manager.

(5) Validity of the tariff

The booking is created for this period and the participant is booked into the class. Once the booking has expired, the class remains valid. A new booking can be created via Course Manager.

Important: The duration of the class is independent of the validity of the tariff.

Booking | Creation | Private Class | Flexible Dates

Example: A booking (private tariff) has been made for a participant with e.g. 10 admissions, which can be used up within 3 months (booking without course allocation or normal private booking). The dates are planned individually.
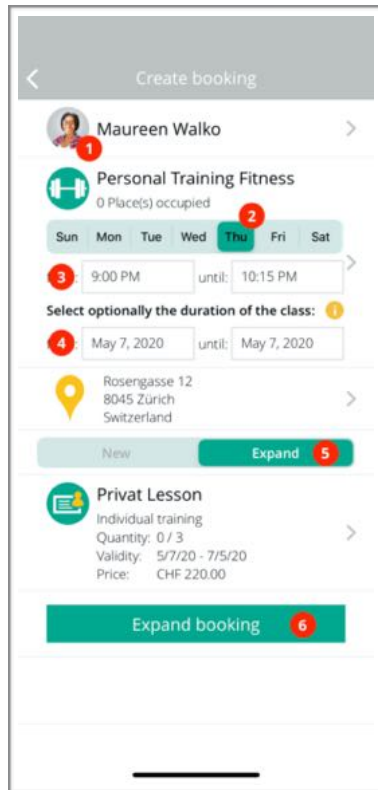
 (1) Participant selection
Select the participant who already has a booking. The existing booking is shown below. **(5)**

(2) (3) Weekday & Time
Select the day of the week and the time at which the class takes place.

(4) Duration of the class
Set the definitive date - Make sure that the **day of the week (2)** matches the **date (4)**.

(5) Expand
The existing booking is displayed and proposed for expansion. .

(6) Expand booking
The class is created for this date. The participant is (for courses with compulsory cancellation) booked directly into the date or listed in the date (participation has to be confirmed).

The booking is proposed for extension until all bookings are used up or the validity period is ended.

Booking| Adjust | Expand | End Booking

Subsequently adjust booking

Bookings can be subsequently adjusted at any time.

This is how it works:

Participants| Valid Bookings|**Touch booking**

or

Classes| Swipe class |Touch Class Manager|**Touch Participant**

- Extend the booking period
- Increase/decrease the number of entries
- Price adjustment (As long as booking status | **Paid - No** |)

This feature can be used to:

- Credit entries from a previous booking
- Extend the booking period due to illness

Expand booking

With one booking several classes can be attended, if the tariff is enabled. The valid booking is extended for this purpose.

This is how it works:

Touch Participants| Swipe Booking |**Touch New Booking**

- Choose a class
- If a valid booking exists, it is displayed below.
- Touch Expand booking | the participant is added to this class.

Helpful Hints:

- Participant appears in the Attendance List
- Participant receives e-abo message about the booking
- Participants can sign in/sign out on dates

No matter from where you create a booking, as soon as there is a valid booking for the respective class it will be suggested for extension.

End booking

A booking is used up if all attendances have been taken and/or the validity has reached its end.

The booking can be ended in the Class Manager or via Participant.

This is how it works:

Touch Participants| Swipe Valid bookings|Touch Booking | **Touch End booking**

or

Classes| Swipe class |Touch Class Manager|Touch Participant | **Touch End booking**

Important:

A booking can also be ended if the booking is still valid. Then the participant will be removed from all classes.
The booking remains in the analyses.

To permanently delete a booking, go to the web Analysis| **Bookings** and delete the booking.

Booking | Follow up booking

Create a follow-up booking for a participant or a whole group.

Follow up booking for individual participant

Option 1: Create a follow-up booking despite the fact that the current booking has not yet been used up = additional new booking.

As soon as the old booking is used up, it can be terminated manually.

Option 2: Create a follow-up booking when the booking is used up. Confirm the ending of the old booking.

If the 'Old booking' is not ended, the participant will appear twice (max. up to 4 weeks after the end of the class) in the Class Manager.

This is how it works:

Participants| Valid Bookings|Touch booking| **New Booking**

or

Classes| Swipe Class |Touch Class Manager|Touch Participant | **New Booking**

4 weeks after expiration the booking is automatically removed from the Class Manager.

Follow up booking for groups / Quarterly classes

You create a follow-up booking for groups if, for example, the **quarterly class expires** and a **new booking** for all or most of the participants is to **be made for the new class**.

- Create a new class with a fixed start and end date on the web

This is how it works:

Option 1: The current quarter is still running - the bookings remain

- Classes| Swipe class|Touch Class Manager|Touch Action Menu | **Renew booking (Group)**
- Check the participants
- Select the **follow-up class**
- Select **'No'** when asked if the old booking should be ended.
- Participants are booked for the follow-up class.

Option 2: The former quarter ends - the bookings are ended.

- Choose the **'previous class' in the App**
- Classes| Swipe class|Touch Class Manager|Touch Action Menu | **Renew booking (Group)**
- Check the participants
- Select the **follow-up class**
- Select **'Yes'** when asked if the old booking should be ended.
- Participants are booked for the follow-up class.

Delete the previous class from the web

Booking | Details (valid & past bookings)

Details of each booking can be accessed. **web:** Analysis |Bookings|**Click:** Details

(1) Information of the booking
All information are displayed

(2) Past attendances
All appointments in which the participant has participated are displayed.

(3) Future attendances
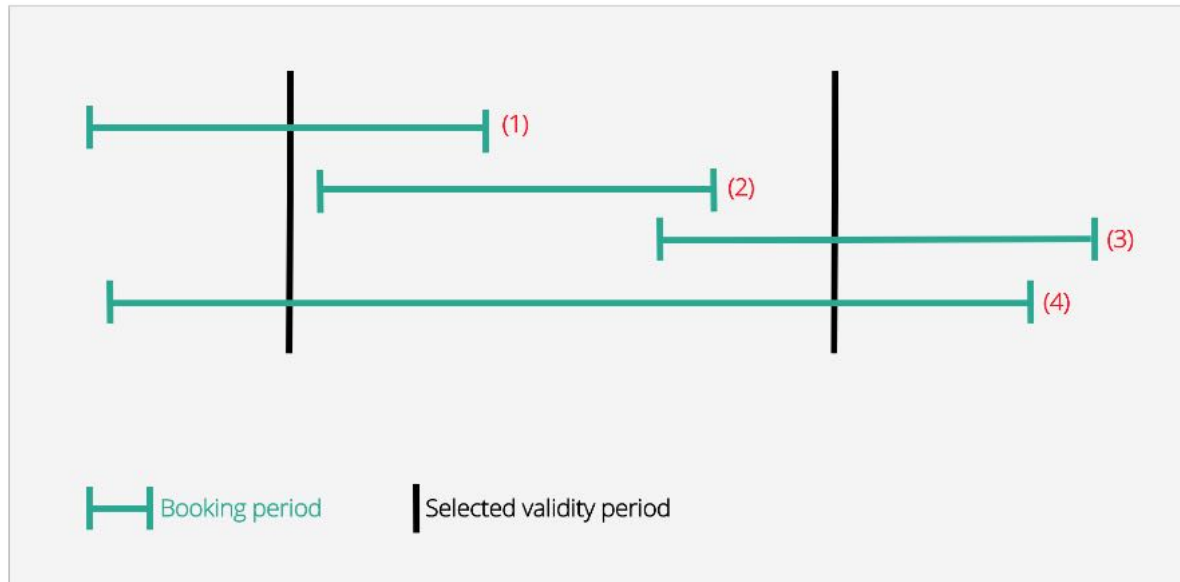All appointments in which the participant will attend are displayed.

Participated

Canceled too late

Participating

Booking | Analysis

Evaluations can be made of the validity of the bookings and the status of the payment. The download can be made in the following formats: CSV, Excel, PDF.

web: Analysis | Bookings

Booking period ⊢⊣ Selected validity period |

Example 1: How many bookings are active in a chosen validity period? Select:

Validity: from - to | **Paid:** All

All bookings are taken into account whose end date (1), start and end date (2), start date (3) and total booking periods (4) is within the validity period. Paid or unpaid.

Example 2: Which bookings have been paid in a certain period? Select:

Validity: All | **Paid:** from - to

All bookings are taken into account which were marked as paid in the period **'paid from - to'**. Bookings paid via e-abo Pay can be filtered separately.

Example 3: Which bookings have been paid in a certain validity period? Select:

Validity: from - to | **Paid:** from - to

Considered are bookings like in example 1, which were paid within the period **'paid from - to'**.

Example 4: Display of all bookings **(default setting)** Select:

Validity: All | **Paid:** All

All bookings ever created are displayed, paid or unpaid.

For users of the | online payment function (Premium Plus) | a further column |e-abo Pay | is integrated. This enables the filtering of payments which were paid via e-abo Pay.

Scheduler

The Scheduler provides an optimal overview of the course dates and their utilisation.

This is how you reach the Scheduler: Touch Classes | Swipe class | **Touch Scheduler|**

Features in the Scheduler

Touch on a date | The Attendance List for this date is opened

Swipe|Touch| Cancel date | The date can be cancelled adding a reason. Participants receive an e-abo message.
Note, the appointment **cancellation** in the app **cannot be undone!**

Swipe|Touch| Message to all| Send an e-abo message to all participants

Swipe|Touch| Deputy| Select a deputy for this date. Once the deputy is chosen, the class will be listed in the deputies view of 'Classes'. For participants, the deputy is visible in the date. The deputy can be revoked at any time.
Important: The deputy is registered and activated on the web as instructor.

General

Classes **with fixed dates** (start and end dates are defined) | All dates until the end of the class are listed.
Ongoing Classes | Dates up to 1 year into the future are displayed.
Number of places occupied | The number of places occupied per date is displayed.
Classes with compulsory cancellation & maximum participants | Occupied places versus available places are displayed per date

Attendance List

The Attendance List shows all expected participants of an appointment.
This is how you reach the Scheduler: Touch Classes | **Touch class |** or via **Scheduler | Touch date**

General

Arrows **< Day & Date >|** **Back Arrow** jump up to max. 4 weeks back - **Forward Arrow** Future dates are displayed.

Touch participant | Confirm or remove the presence (check mark). Participations can be adjusted backdated (max 4 weeks). The different statuses are described in the Waiting List.

Swipe Participant

Participant | Displaying the participant information.
Send message | Send an individual e-abo message to the participant.

Touch Action Menu

All present| With one click all participants can be marked as present. They will receive an e-abo message.

Send message to all| Send an e-abo message to all participants of this date..

Add participant| A participant with valid booking can be added to the date.

Waiting List| Access to the Waiting List for dates. You can add waiting participants, if there are still entries on the booking available.

Cancel date| Cancel the date of the class definitively.

Classes with compulsory cancellation

Participants are listed as **present** for the date, if they don't **have signed out** or cancelled too late (grey circle, white tick).

Waiting List | By Date

Participants can place themselves on the waiting list for dates. They move up automatically according to placement as soon as a participant has cancelled a fully booked date. Participants will receive an e-abo message if they got the place.

This is how you reach the Waiting List by date: Touch Classes | Touch class | Touch Action Menu|**Touch Waiting List**

General

- Two hours before the class starts, the waiting list is no longer automatically managed.
- Instructors can always overbook the date by taking over participants from the waiting list.
- Hint: Participants can only be transferred if the booking allows this - i.e. at least one free entry is available on the booking (9/10).

Participant Status in Attendance List

**Green circle|**white tick |Participant is registered for this date

Grey circle |white tick|Participant was registered for this appointment and cancelled too late. Attendance is charged to the participant, the appointment is released.

White circle|no tick |Participant is not signed in - may have signed out himself

Attendance Overview

In the app, Participants and instructors can view the confirmed attendance of a valid booking. Past attendances, as well as future ones (if dates are selected) are displayed.

Instructor:
Via Participant: Swipe Participant **|** Valid bookings **|**Touch Booking | Touch Action Menu | Touch Confirmed attendance
Via Class Manager: Touch Participant | Touch Action Menu | Touch Confirmed attendance

On the Web, for all bookings, including past ones, the attendance can be viewed, exported or printed.
Web: Analysis |Bookings | Touch Details

Participant:
Touch My Classes **|** Touch booking **|** Touch Confirmed attendance

Participant Status in Attendance List

Green circle|white tick |Participant is registered for this date
Grey circle |white tick|Participant was registered for this appointment and cancelled too late. Attendance is charged to the participant, the appointment is released.
White circle|no tick |Participant is not signed in - may have signed out himself

Invoice / Confirmation

This is how the invoice/confirmation is structured. The free text in the company profile and with the course instructor can be adapted individually.
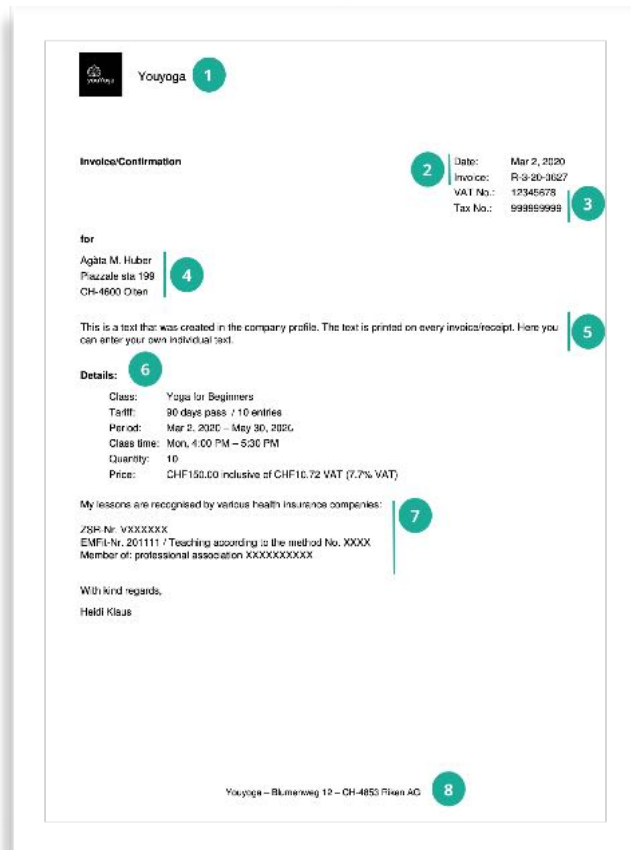
1 + 8 | Company logo | Company name | Company address

2 | Date when the invoice was paid and the invoice number.
Example: R-49-19-00689
R-49 | internal e-abo provider ID
19 | current accounting year
00689| Invoice counter - is reset to '0' annually

3 | Optional | UID | Tax number

4 | Participant address

5 | Optional | Free text from company profile

6 | Booking details - for bookings without class assignment the tariff conditions are shown

7 | Optional | Information which is entered in the instructor account. e.g. health insurance...

e-abo Messages & Emails

Participant receives e-abo message

- Creation of a booking by the instructor
- Confirmation of attendance
- Revocation of attendance
- Cancellation of date by instructor
- Subscription termination
- Expiry of a booking in 7 days or if only 2 participations are left
- Individual message from instructor
- Move up from the waiting list

Participant receives e-abo e-mail

- Invitation by instructor for registration
- Confirmation of registration
- Reset password
- As soon as rate is set to paid, invoice/confirmation is sent
- For support requests

Instructor receives e-abo message

- Receipt of a class request
- Subscription termination by participant
- Individual message from participant
- If set as deputy for an appointment

Instructor receives e-abo e-mail

- Invitation from provider to register
- Confirmation of registration
- Reset password
- For support requests
- Expiring bookings (according assigned role)

Premium Plus (e-abo Pay!) - The payment function in e-abo

You have tested the Premium Version and now you want to switch to the e-abo payment function? It takes only a few steps to do so. The payment account is created in e-abo Pay (separate login).

After the verification of your identity (see next page), your participants will be able to buy classes and tariffs in the app or pay for bookings you have created in 'My classes' (Current / Past).

The customer receives, as soon as the payment has been made, by email
- A confirmation of payment
- Invoice and Confirmation

You will receive, as soon as the payment has been made, by email
- A confirmation of receipt of payment
- An e-abo message that a booking has been made

Note: Classes can only be purchased in the app if there are still places available for the entire course.
- If a class is fully booked or complete on single dates, the interested party can make a class request.
- You can decide case by case if you want to overbook the class.
- When you create a booking, the participant can pay for it in the app.

The three areas to finish your payment platform are explained below.

Premium Plus - Setup

Step 1: Verifying identity

An official document must be submitted to verify your identity. This is required by law (e.g. passport).

Menu item| Payment providers | Update account details
- Fill in all fields completely
- Upload the requested documents (e.g. passport, ID)
- The check should be done within 1-2 working days. You will receive a confirmation email

Step 2: Select payment provider

Menu item| Payment providers | Show details
- Select the desired payment methods, they will be activated immediately
- Customize the text field **|Statement Descriptor|**(Name of your school/company)
- Save changes
- If you want to activate additional payment providers, separate contracts must be contracted
- Step by step instructions for setting up TWINT

Step 3: Look @ Feel (Optional)

Menu item| Settings | Look & Feel
- Here your logo can be uploaded and colours for buttons and font can be stored
- This is how you can individualize your payment portal

Contact me directly at heike@e-abo.com and I will support you with the setup.

Premium Plus - Payment processing

Tips | Adjust class times for running classes

Time of the running class changes

WEB|Classes|Actions|**Edit**|Edit the class on the web and enter the new times

APP| The allocation of participants for upcoming class dates remains unchanged

APP|Participants on the waiting list for upcoming class dates remain unchanged

If the day of the week also changes, <u>this will be considered a new class</u> - if the participants are to be transferred to the new class, please follow these steps:

WEB|Classes|Actions|**Edit**|Edit the class on the web and enter the new times.

(1) End the attendance of the participants in the previous course (execute for each participant)

APP|Touch Classes|Swipe Class|Touch Class Manager|Swipe Participant|**Touch End participation|**

(2) Add the participants to the new class via **|expand booking|**

APP|Touch Classes |Swipe Class|Touch Class Manager|Swipe Participant|**Touch End participation|**

    |Touch|Action Menu|New booking|Choose participant|**Touch Expand booking|**

(3) Delete the no longer valid class from the web: WEB|Classes|Actions|**Delete|**