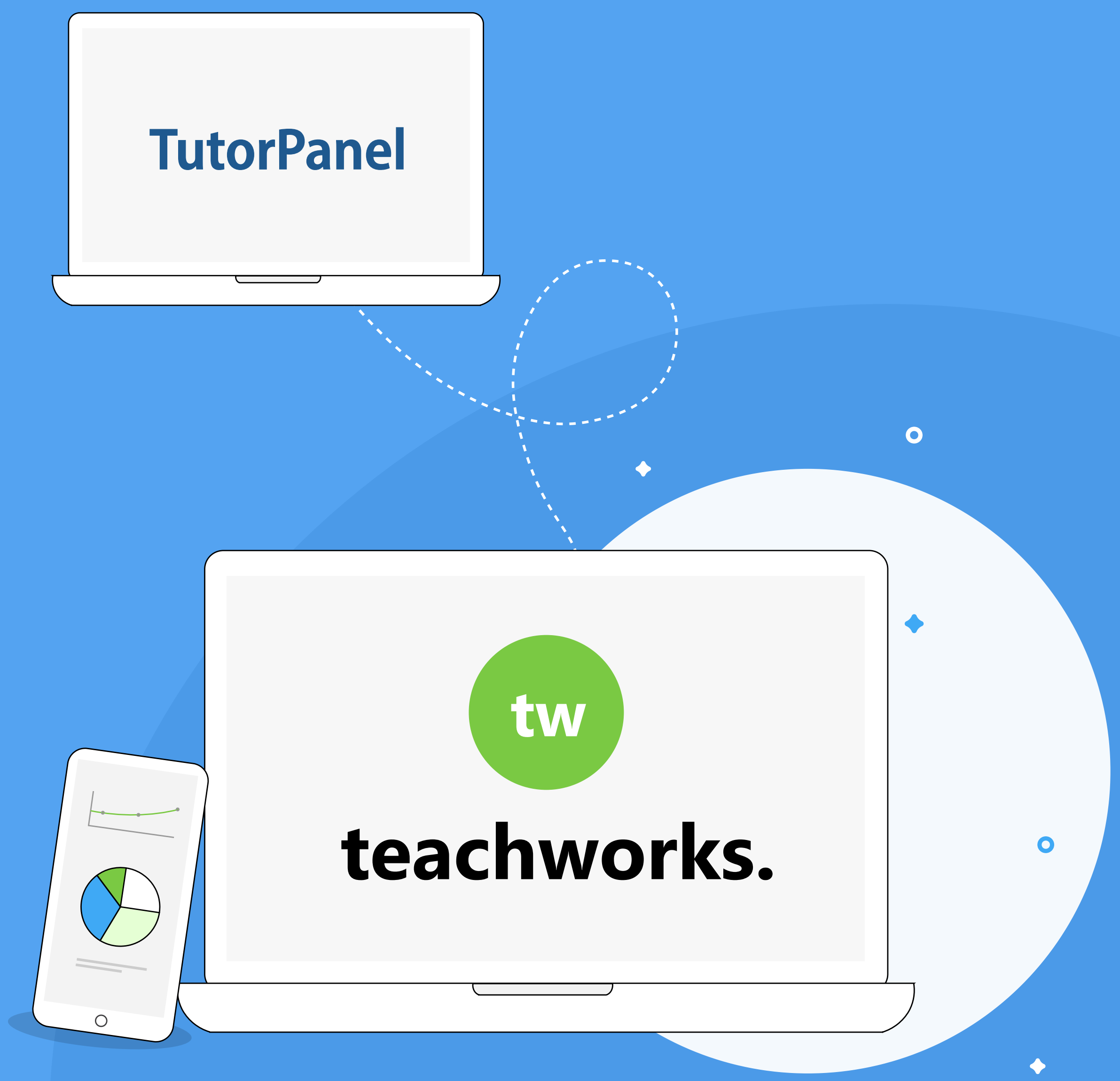
YOUR COMPLETE GUIDE

Switching to Teachworks



Welcome to Teachworks!

We are happy that you've decided to switch to Teachworks and we look forward to helping you manage and grow your business!

In this short guide, we'll provide you with all the information you need to make the switching process as painless as possible.

COMPARISON

TutorPanel Features Mapped to Teachworks

Account Settings

The table below maps settings from your Account Settings page in TutorPanel to their similar settings in Teachworks. Teachworks' Account Settings page can be found by going to the Account & Settings tab and clicking "Account Settings".

TutorPanel Setting		Teachworks Setting
Contact Information		Account Settings → Company Settings section
Calendar Settings		Account Settings → Calendar Settings section
Calendar Feed Settings		Integrations & Add-ons → Calendar Feeds
Lesson Requests		Integrations & Add-ons → Lesson Requests
Local Settings		Account Settings → Localization Settings section
Invoice Settings		Account Settings → Invoice Settings section
Payment Methods		Integrations & Add-ons → Stripe
Cancelled Sessions		If "Set Manually" in Teachworks, go to Integrations & Add-ons → Custom Statuses, and map the "Cancelled" status to "Missed".
Teacher Settings	Contact Info	Account Settings → Customer Account Settings section → Teacher Contact Info
	Custom Fields	Integrations & Add-ons → Custom Profile Fields → Set teacher visibility on form for individual custom profile fields
	Student Birthdays	Account & Settings tab → Dashboard Settings → Employee Default Widgets → Teacher Defaults → Check box for Student Birthdays.
	Teacher Wages	If using Wage Tiers then go to Account Settings page → Cost & Wage Settings → Set Wage Tiers field to "Enabled". Add Wage tiers by going to Account & Settings → Services → Click "Add Wage Tier" in the sidebar.

Family & Student Accounts	Profile Editable	Account Settings → Customer Account Settings → Edit Profile
	Hide Transactions Table	Account Settings → Customer Account Settings → Transactions Page
Miscellaneous	Logout Redirect	Account Settings → Login & Logout Settings → Logout Redirect
Logos & Colors		Account Settings → Logo. The same logo is used for login page and invoices. Teachworks does not have an option for changing the color of the navigation menu, but instead just uses a neutral color.

Extra Teachworks Account Settings

On the Account Settings page in Teachworks you'll also find a large number of customization options that don't exist in TutorPanel. A few examples of these include:

- Custom terminology for teachers, students, customers, and lessons.
- Custom date and time formats
- Calendar appearance and validation settings
- Cost & Wage settings such as cost override, cost & wage premiums and recalculate rates feature
- Track packages by hour or lesson, family or student
- Invoice appearance settings and defaults including default sales tax, custom lesson descriptions, default instructions, and more.
- Notification settings including a different email for sending and options to have replies to lesson notes and reminders go to teachers.

Other Pages & Settings

The table below includes a list of other features and settings in TutorPanel and where to find the equivalent or similar features and settings in Teachworks.

TutorPanel Feature	Teachworks
Home Page	Dashboard Choose your own dashboard widgets by going to Account & Settings → Dashboard Settings
Teacher & Staff Hours	Employees → Employee Hours → Click Row to view detail of hours & earnings
Teacher Payments	Employees → Employee Payments Employees → Employee Hours → Click row for individual employee and use checkboxes and forms at bottom of page. Bulk Wage Payments Add-on
Batch Reconcile	Bulk Lesson Status Complete Lessons in Succession
Lesson History	Calendar → Lesson History by Student Calendar → Lesson History (shows single record for lessons even if lesson has multiple students)
Tutoring Prices	Account & Settings → Services
Tutoring Locations	Account & Settings → Locations
Tasks	Integrations & Add-ons → Tasks
Send Mass Email	Integrations & Add-ons → Email Add-on
Schedule Confirmation	Integrations & Add-ons → Schedule Confirmation
Custom Profile Fields	Integrations & Add-ons → Custom Profile Fields
Files	Integrations & Add-ons → Profile Attachments (for files assigned to specific teachers, families or students) Integrations & Add-ons → Shared Profile Resources → Add private link to a folder with a service like Dropbox or Box.com (for files that are shared by a type of user)
Lesson Reports	Reports → Lesson Summaries Report
Calendar List View	Calendar → Calendar List View
Calendar Teacher View	Reports → Lesson Summaries Report Settings: • Data Type: Lessons • Select Date Range • Format: List • Group By: Teacher • Columns: Select columns such as start and end time, title, etc.

Notification Templates & Settings	Lead Time set on Account Settings page → Notification Settings → Lesson Reminder Lead Time in Hours Edit Templates at Account & Settings tab → Notification Templates Manual Lesson Reminders enabled an Account Settings page → Calendar & Event Settings → Manual Lesson Reminders
General Expenses	Teachworks currently only tracks revenue related to teacher hours & earnings, but you can track your expenses in QuickBooks Online and Teachworks will sync your customers, services, invoices & payments.
QuickBooks Export	Teachworks integrates with QuickBooks Online for accounting

Extra Integrations & Add-ons in Teachworks

In addition to the features listed above, Teachworks has **more than 50 Integrations & Add-ons** that you can enable and customize to extend the functions in your Teachworks account. These are in Teachworks under the Account & Settings tab → Integrations & Add-ons.

You can find more information about these here:
Integrations & Add-ons Overview
Integrations & Add-ons Documentation

COMPARISON

Notable Differences in Teachworks

Subjects

- In TutorPanel subjects are set on student and teacher profiles using free text.
- Teachworks uses a standard subject list that allows you to select one or more subjects from a menu on student and teacher profiles. This improves the consistency of subject names and makes it easier to match by subject.

Teacher Availability

- In TutorPanel teacher availability is only entered as text on a teacher's profile and this text is displayed in the sidebar of the calendar when filtered by teacher.
- In Teachworks availability is set on teacher profiles by setting their available time slots by day of the week. When the calendar is filtered by teacher, or when you view the Teacher Calendar you will see the teacher's unavailable time slots shaded out.
- You can also add unavailability for teachers using this method: Unavailability.

Staff that are also Teachers

- In TutorPanel if an employee is both a teacher and staff employee you would need to create two profiles for each role.
- In Teachworks you can add a staff employee and check the "Include as Teacher" box on their profile and they will be listed as a teacher as well without the need to add a separate teacher profile.

Welcome & Account Confirmation Emails

- In TutorPanel there is an option to send a Welcome email which contains information with the user's login details.
- In Teachworks a welcome email is separate from the user account confirmation email. This allows you to send a welcome email to clients even if you won't be enabling a user account for them. Or you can send only a confirmation email in case you don't want to send a welcome email.

Student Billing per Session

- In TutorPanel student billing can be set to "Per Session" using the cost in the price list.
- In Teachworks you can choose to use the hourly rate from the Service list or set an hourly rate on the student's profile.

Flat Fee Billing

- In TutorPanel when using the "Flat Fee" billing method, the cost and repeat settings are set on the student's profile.
- In Teachworks when using the "Flat Fee" billing method you will need to add the client to an Invoice Autopilot schedule. This article has more information: Flat Fee Billing Method.

Package Billing

- In TutorPanel packages can be created without an invoice and the package lessons have a cost assigned to them and this is deducted from the client's account balance as the package lessons are used.
- In Teachworks, you need to create an invoice with a package. When a student's billing method is set to Package, their lessons do not have a cost assigned since the client has paid for a package and not individual lessons. You can find more information in this article: Package Billing.

Wage Methods

- In TutorPanel teachers' lesson wages are set using the wage rate specified in the Tutoring Price List, or if that is zero it falls back to the rate set on the teacher's profile.
- In Teachworks you can choose to either 1) Use the Service List Wage, or 2) Set the Wage on the teacher's profile.
- If you would prefer to use the wage method of TutorPanel, contact Teachworks support and we can enable a "Profile Wage Fallback" add-on in your account that replicates the wage method of TutorPanel.

Non-Teaching Hours & Earnings

- In TutorPanel non-teaching hours & earnings can only be tracked for staff employees.
- In Teachworks you can track non-teaching hours & earnings for teachers and staff. This is set on their profile under the "Non-Teaching Wage Type" field. This article has more information: Tracking Non-Teaching Hours & Earnings.
- Teachworks also supports tracking non-hourly earnings for things like bonuses, salaries, etc. This article has more information: Tracking Non-Hourly Compensation.

Account Balances

- In TutorPanel Account Balances are the sum of fees minus payments.
- In Teachworks Account Balances are the sum of invoices minus credit notes and payments.

Adding Subjects

Whereas the subjects field on profiles in TutorPanel allows you to enter any text, Teachworks displays a select menu of subjects that you've pre-defined. This ensures consistency and makes it easier to match students and teachers.

If you use subjects in TutorPanel, you'll want to set these up before importing student or teacher profiles. Subjects can be added one-by-one, or you can add them in bulk. To add subjects in bulk, follow the steps below:

1. Go to the Student List (Students > Students) or Employees List (Employees > Employee List) and click the “Standard Subjects” link in the sidebar.
2. Click the “Add Multiple Subjects” link in the sidebar
3. Add subjects separated by a comma and click “Save”.
4. The Subjects field on student and teacher profiles will now allow you to select one or more of these subjects.

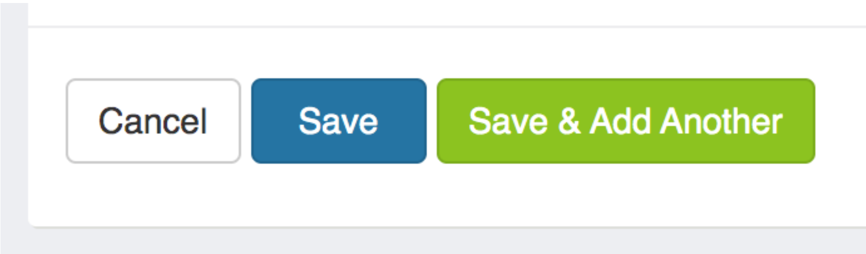
More information: Managing Subjects

ADDING RECORDS

Adding Locations

You can add locations to your Teachworks account by going to Account & Settings > Locations > Add Location. You can customize settings based on your requirements, such as including an address or including the location in conflict checking.

If you need to add multiple locations while getting started, you can click the "Save & Add Another" button. This will clear the fields and allow you to add data more efficiently.



More information:

[Adding Locations Tutorial]

Importing Records

Teachworks has import templates that can be used to speed up the process of importing records into your Teachworks account.

1. Downloading Records from TutorPanel

To make the process of switching to Teachworks easier, you can export your TutorPanel records in the format for importing into Teachworks.

Log into your TutorPanel account and go to:
https://www.tutorpanel.com/admin/teachworks

2. Services

If you don't have many items in your Tutoring Price List in TutorPanel, you can add them manually by following the steps in this article: Adding Services.

If you have a lot of items to import, we've added a hidden feature to import services, which you can access by following these steps:

1. Go to Account & Settings > Service List
2. Add /“import” to the end of the URL appearing in the address bar in your browser (for example: https://companyname.teachworks.com/services/import)
3. Click the “Service Template” link to download the template
4. Complete the template with your service information. You can copy and paste the data from the "Price List Export" file from Step 1.
5. Click the “Choose File” button under “Select .xls File” and click “submit” to import the records.

3. Employees

There are 2 types of employee users in Teachworks:

- **Teachers** **-** These are teaching staff that don’t require access to the administrative side of things.
- **Staff** **-** These are administrative staff that require access to administrative functions (such as invoicing, client records etc). Staff can also be included as teachers.

To import employees, you’ll need to download and complete the relevant template.

1. Go to Employees > Employee List > click "Upload Employees" in the sidebar. Then click the links to download the “Teacher Template” or the “Staff Template”.
2. Once you’ve downloaded the relevant template, update it with your data. You can copy and paste the data from the "Teachers Export" and "Staff Export" files from Step 1.
3. Click the “Choose File” button under “Select .xls File” and click “submit” to import the records
4. Start with just a few rows of records to make sure there are no errors and then proceed with the rest.

More information: Instructions for Filling Teacher & Staff Templates

4. Clients

You can Import Families with Child Students or Independent Students to Teachworks:

- **Families & Child Students** - These are typically parents with school aged kids. Families are responsible for billing, and students are assigned to lessons in the calendar. Families can also be companies with employees listed as child students.
- **Independent Students** - These are typically adult students that are responsible for their own billing.

To import clients, you'll need to download and complete the relevant template.

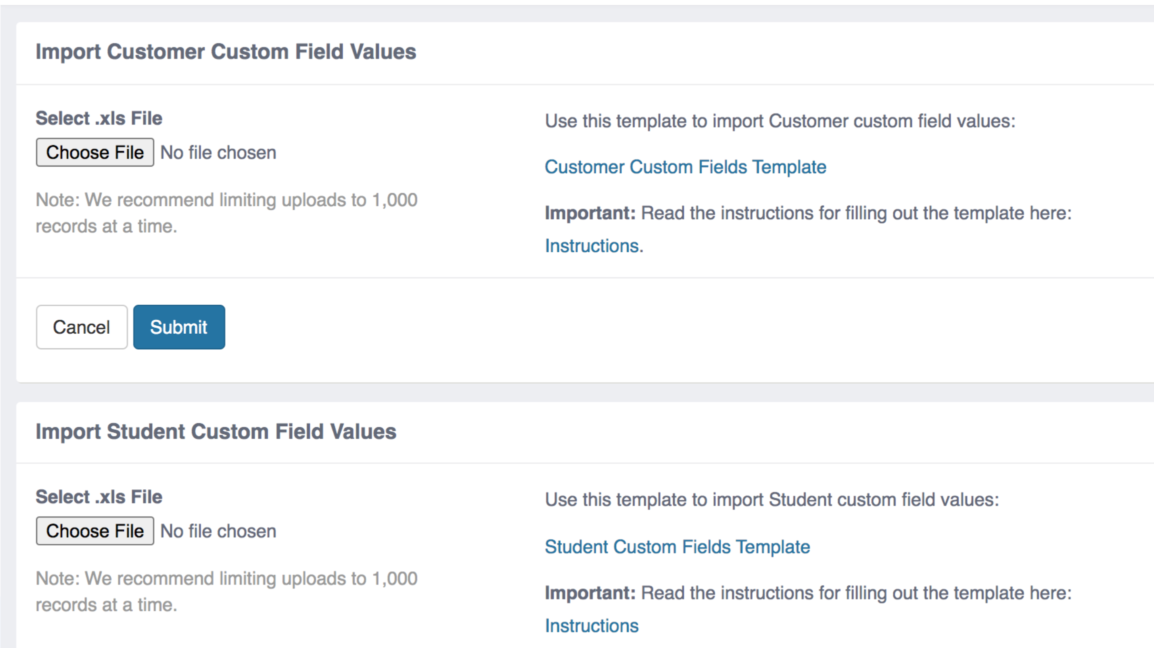
1. Go to Students > Student List > Click "Upload Students" in the sidebar. Then click the links to download the "Family Students Template" or the "Independent Students Template".
2. Once you've downloaded the relevant template, update it with your data. You can copy and paste the data from the "Family & Child Students" and "Adult Students" export files from Step 1.
3. Click the "Choose File" button under "Select .xls File" and click "submit" to import the records
4. Start with just a few rows of records to make sure there are no errors and then proceed with the rest.

More information:
Instructions for Filling the Family Student Template
Instructions for Filling the Independent Student Template

Adding and Updating Custom Profile Fields

You can add custom fields to client, student and employee profiles by using our Custom Profile Fields Add-on. If you're adding a large number of fields, you can use the "Save & Add Another" button to add them more efficiently.

Once you've imported your clients and created custom profile fields, you can import custom profile field data using the Import Custom Profile Field Values Add-on. Templates are available for Customers, Students and Employees. You can follow the links next to each template for step-by-step instructions on how to fill them.



Setting Up Starting Balances

You may have clients that have credits, or clients that owe money. For this reason, you may want to set up starting balances in Teachworks to keep track. To do this, you can follow the steps below for the relevant scenario.

1. Client Owes Money

If a client owes money, an invoice will need to be created for the amount owed. You can find a detailed tutorial for generating a single invoice here: Generating An Invoice Tutorial

1. Generate an invoice and choose the “Add Charge” option.
2. Enter a charge for the amount that is owed.
3. In the description, indicate that this is a starting balance (you can also indicate the specific lessons or invoice from your previous billing system).
4. “Save” the invoice if you’d like to add more charges at a later stage, or “Approve” the invoice to add it to the client’s balance immediately.
5. Go to Billing > Customer Balances to double check that balances have been added correctly.

2. Client Has A Credit Balance

If a client has a credit balance, you can create a Credit Note in Teachworks to reflect this. You can find detailed steps here: Creating a Credit Note

1. Create a new credit note and choose the “Add Charge” option.
2. Indicate what the credit is for in the description field.
3. Click the “Approve” button to approve the credit immediately.
4. Go to Billing > Customer Balances to double check that balances have been added correctly.

When you generate an invoice for the client later on, you will be able to apply the credit to the invoice to reduce the balance.

STARTING BALANCES

Setting Up Starting Package Balances

If you use Package Billing to bill your clients for a number of lessons/hours, and they still have lessons/hours available from TutorPanel, you can easily set up starting balances in Teachworks by following the steps below.

Before diving in, you may want to read more about how packages are tracked in Teachworks here: Package Billing Method

1. Ensure that you've updated Package Settings based on your specific requirements (see article above).
2. Calculate how many lessons/hours a client has in their package.
3. Create a single invoice in Teachworks and select the "Add Package" option.
4. Select the service, set the number of hours/lessons remaining and set the unit price to zero (since the client has already been billed previously).
5. Approve the invoice.
6. Go to Billing > Package Balances to make sure the balance has been added correctly.

You can also view the Packages Tutorial here: Creating Packages

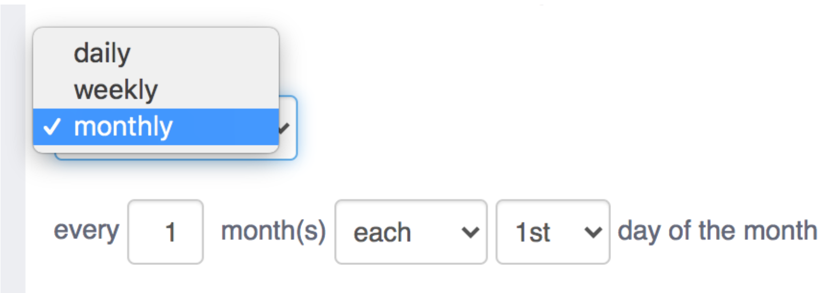
INVOICE AUTOPILOT ADD-ON

Automating Invoicing

The Invoice Autopilot Add-on (similar to Auto Invoicing Schedules in TutorPanel) allows you to automate invoicing for your business.

If you currently bill clients using the Flat Fee method in TutorPanel, you can use this feature to add a client to an existing billing schedule, or you can create a new Invoice Autopilot schedule for the client.

It comes with flexible repeat settings to accommodate almost any billing schedule.



Learn more about this add-on: Invoice Autopilot Add-on

TIPS & TRICKS

Helpful Recommendations

1. Don’t Import Historical Records

To keep your books up-to-date and free of errors, we don’t recommend re-entering historical data such as lessons or invoices. Instead, it’s best to decide on a firm switch date from which you can add future lessons and invoices. If you need to access records from prior to the date, you can refer to any backup files that you’ve downloaded from TutorPanel.

2. Start Small

A great method for making sure you understand the fundamentals of Teachworks before adding all of your business data is to start with a small number of tutors and clients first (1 or 2 should do the trick). If you would like to start with dummy data initially, that’s fine as well.

Starting small will benefit your business in the following ways:

- You will get familiar with Teachworks much quicker because there’s less data to focus on.
- You will be able to identify processes that are a little different compared to TutorPanel and be comfortable with managing these before your account is filled with data.
- If you make a mistake, it will be much easier to clear out your data and start over if there are just a few records.

Getting Started Steps

Step 1: Choose a teacher and assigned client to test with

When choosing a teacher and client to add to your account, opt for users that will allow you to thoroughly test out Teachworks' features. You may want to consider the following:

- Do they have upcoming lessons or a very recent lesson that you can add to Teachworks?
- Does the client have a starting balance, or will you be able to generate an invoice for them?

Step 2: Import users / Add users manually

Once you've decided on a teacher and client to test with, you can use the import templates to import them to Teachworks. You can also add these records manually, but if you will be using the import feature anyway, it might be good to familiarize yourself with the feature early on.

Step 3: Add All Other Required Information

Make sure that the following is added/set up:

- The relevant service(s) that will be assigned to lessons
- The relevant location that will be assigned to lessons
- The correct billing method and wage method is selected on student and teacher profiles (more information: Billing Methods)
- The student is assigned to teacher (here's how: Assigning Students to a Teacher)

Step 4: Schedule Lessons

To schedule lessons, you can follow along with this tutorial: Scheduling Lessons. You may also want to play around with the following scheduling time-savers:

Copying Lessons
Adding Repeating Lessons
10 Techniques For More Efficient Scheduling

Step 5: Generate an Invoice

To generate an invoice, you can use this tutorial: Generating an Invoice Tutorial.
If you sell packages to your clients, you can find instructions here: Creating Packages.

Step 6: Run Reports

Now that you've added in your data, you can try out our reports to see how data is tracked in Teachworks. You can find more information about our various reports in the articles below:

Breakdowns Report
Lesson Summary Report
Time Series Report
First Lesson Report
Last Lesson Report

LEARN MORE

Resources

The resources below contain more information to help you get set up faster.

Tutorials

Image and video tutorials covering our core features.

Knowledge Base

Step-by-step instructions related to all of our features.

Demo Video

Watch our Demo Video for an in-depth overview.

Contact Us

Questions? Contact us at support@teachworks.com.

Thank you!

We look forward to growing with you!

teachworks.

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