



Center Tour Request

Waitlist Online

User Guide

Last update February 23, 2016

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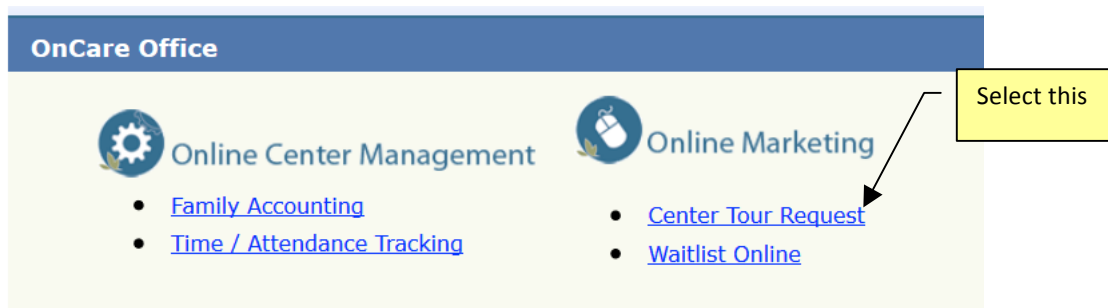
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1. What is The Purpose

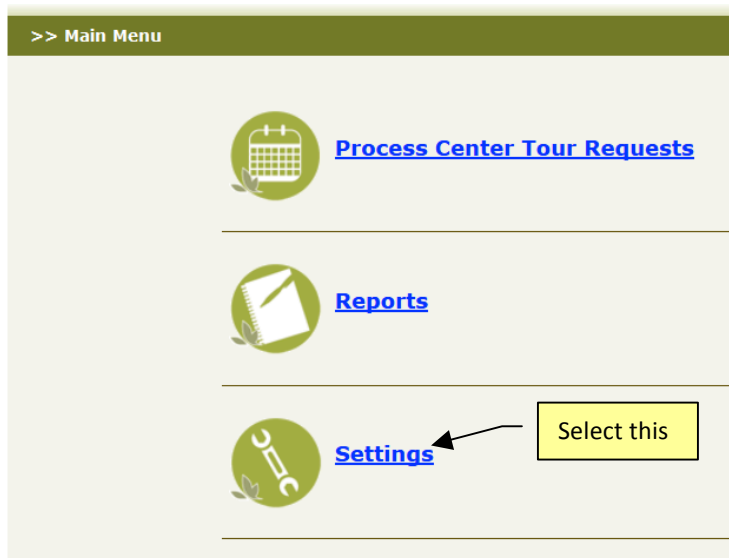
The Center Tour Request module is a part of the OnCare Online Marketing service. It is partially related to the Waitlist Online module. It helps providers to manage all the center tour and waitlist requests from prospective families.

2. How to Access

To access the Center Tour Schedule more, click on Interested Families Mgmt on the OnCare Office main page.



Before you can use the Center Tour Request module, you need to configure the module in accordance to your center requirements. To start the configuration, select "Settings"



3. General Setup

Click Setup to view the customization options. All the settings configured here will be seen by the prospective parents when accessing the URL.

The screenshot shows the 'General Settings' page. At the top, there's a green header with '>> General Settings'. Below it, a navigation bar contains links: 'Main Menu', 'Setup Program Schedule', and 'Setup Center Tour Schedule'. A 'Select a Center' dropdown is set to 'The Little Mud Puddles Learning'. A red note states: 'Note: This information provided below will be displayed on the Center Tour Request section of the website that prospective parents will see.' The 'Full Day Schedule' section has 'Start Time' (7:00 AM) and 'End Time' (6:30 PM) dropdowns. Below it, 'Part Day Schedule #1' and 'Part Day Schedule #2' each have 'Non Scheduled' dropdowns for both start and end times. A 'Special Message' text area is present. A callout box points to the 'Full Day Schedule' section with the text: 'Specify your Full Day and Part Day Schedule here'. Another callout box points to the 'Special Message' area with the text: 'This is optional. If needed, you can add a special message for prospective parents to see'. Below the 'Special Message' area, a red note explains the 'Director Manual Confirmation Required' setting: 'Note: This setting determine the timing and type of email sent: No = Request Received email is sent to prospective parents automatically without any intervention from director. Yes = Request Confirmation email will be sent only when director manually confirms each tour request online.' The 'Director Manual Confirmation Required' section has radio buttons for 'No' (selected) and 'Yes'. A callout box points to the 'Yes' radio button with the text: 'This controls how the prospective parent tour request will be handled when it is submitted.' At the bottom, there is a 'Submit' button.

>> General Settings

[Main Menu](#) | [Setup Program Schedule](#) | [Setup Center Tour Schedule](#)

Select a Center: The Little Mud Puddles Learning

Note: This information provided below will be displayed on the Center Tour Request section of the website that prospective parents will see.

Full Day Schedule

Start Time: 7:00 AM End Time: 6:30 PM

Part Day Schedule #1

Non Scheduled Non Scheduled

Part Day Schedule #2

Non Scheduled Non Scheduled

Special Message

Note: This setting determine the timing and type of email sent:
No = Request Received email is sent to prospective parents automatically without any intervention from director.
Yes = Request Confirmation email will be sent only when director manually confirms each tour request online.

Director Manual Confirmation Required

☒ No ☐ Yes

Submit

Specify your Full Day and Part Day Schedule here

This is optional. If needed, you can add a special message for prospective parents to see

This controls how the prospective parent tour request will be handled when it is submitted.

4. Add/Edit Programs

To specify the type of programs offered, click Add/Edit Programs. This is very helpful to minimize the mismatch of prospective parents' inquiries and ineffectively scheduling tours. For example, if an Infant program is not available, prospective parents will clearly know when they try to request a tour.

>> Setup Program Schedule

[Main Menu](#) | [General Settings](#) | [Setup Center Tour Schedule](#)

Select a Center: The Little Mud Puddles Learning

You specify the type of programs you offer

Age Group	Schedule	No of Days/Day of the Week	Wait List Option	Edit	Delete
2-3 Years	Full Days	5 days a week	Yes	Edit	Delete
3-4 Years	Full Days	5 days a week	Yes	Edit	Delete
4-5 Years	Full Days	5 days a week	Yes	Edit	Delete

[Add New](#)

When you add a new program, you can specify the age group, schedule type, no of days per week (e.g. 5 days, 3 days) or specific days of the week.

Age Group	Schedule	No of Days (or) Day of the Week	Wait List
Select here... ▼	Select here... ▼	Select here ▼ <input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri	<input type="radio"/> Yes <input checked="" type="radio"/> No

5. Setup Center Tour Schedule

Finally you can setup your center tour schedule by specifying which day of the week and what time within those days that you offer tour. If you offer group tour, you can also set max number of tour per time slot. When the max is reached, the system will alert the parent to choose a different time slot.

>> Setup Tour Schedule

[Main Menu](#) | [General Settings](#) | [Setup Program Schedule](#)

Select a Center: The Little Mud Puddles Learning

Offer Tour Schedule: ☐ No ☒ Yes

Max # of Request per Time Slot: 2

of Weeks Ahead to Schedule Appt: 2

How many people for group tour

Day of the Week	Morning Session		Afternoon Session	
	From	To	From	To
Mon	9:30 AM ▼	12:00 PM ▼	Non Scheduled ▼	Non Scheduled ▼
Tue	Non Scheduled ▼	Non Scheduled ▼	Non Scheduled ▼	Non Scheduled ▼
Wed	Non Scheduled ▼	Non Scheduled ▼	3:15 PM ▼	5:30 PM ▼
Thu	Non Scheduled ▼	Non Scheduled ▼	Non Scheduled ▼	Non Scheduled ▼
Fri	9:30 AM ▼	12:00 PM ▼	3:15 PM ▼	5:30 PM ▼

6. Publish Center Tour Request on Your Website

After you are done with the Center Tour setup, you are ready to publish the unique Center Tour URL on your website. Each center has an unique URL. If you don't have the URL yet, please ask OnCare Support for that. You can give the URL to your webmaster to update on your website. Following is an example of a provider website:

The screenshot shows the homepage of 'The Little Mud Puddles Learning Center'. The header features a blue banner with the center's name in yellow, flanked by cartoon characters on the left and a photo of two children on the right. Below the banner is a navigation menu with links: Home, About Us, Visit Our Center, Parent Resources, and Policies & Procedures. The main content area includes a welcome message, a mission statement, and a photo of children on a playground. A yellow callout box points to the 'Click to Schedule a Tour' link, stating: 'Example of how an existing Oncare client publishes the Center Tour on their website'. Another yellow callout box points to the browser's address bar, stating: 'Notice the URL on the browser'. The address bar shows the URL: <https://www.oncareoffice.com/Marketing/InterestWaitList/Schedule.aspx?FLG=400>. A third yellow callout box points to the text 'The Center Tour URL will take the prospective parent to the Oncare Center Tour application.'


Example of how an existing Oncare client publishes the Center Tour on their website

Notice the URL on the browser

The Center Tour URL will take the prospective parent to the Oncare Center Tour application.

<https://www.oncareoffice.com/Marketing/InterestWaitList/Schedule.aspx?FLG=400>

All the information displayed here is based on the configuration you have done earlier. Whenever you go back to the back office and make any change to the configurations, those changes will be reflected immediately on these prospective parent facing pages.



The Little Mud Puddles Learning Center

>> Lookup Days/Hours of Care Offered

So we may best assist you, please select the age group and schedule of class/childcare that
If the age group and schedule of class/childcare is not listed, this means we do not offer that program currently.

Select an Age Group

Oncare uses a banner like this to make the user feel like they are still interacting with your website.



The Little Mud Puddles Learning Center

>> Lookup Days/Hours of Care Offered

Currently we have a waiting list for the schedule you selected.

Please tell us what you would like to do next.

Parent clicks here

[Join Wait List](#)
[Request a Tour](#)
[Contact Me](#)

Prospective families will be taken to the page to fill in all their contact information and the preferred tour time.

>> Request a Tour

Please provide us your contact information

First Name

Last Name

Email

Best Number to call ()

Child's First Name

Child's Last Name

Gender ☒ Boy ☐ Girl

Potty Trained ☒ Yes ☐ No

Date of Birth

When Care Needed

How did you hear about us

If Other (please specify)

Each time a tour schedule is requested, the center director will get an email notification regarding this request.

7. Process Center Tour Requests

Whenever you access the Center Tour Request module in the backend, you can process all the center tour requests.



The Process Center Tour Requests will list all the tour requests by date:

The screenshot shows the 'Center Tour Requests Listing' page. It includes a 'Main Menu' link, a 'Center Name' field, and a table of tour requests for August 2014. A yellow box highlights the 'Main Menu' link and the 'Click this to see more details' text, with an arrow pointing to the 'Edit' link in the 'Action' column of the first row.

No.	Req #	Date Submitted	Last Name	First Name	Child's FN	Age Group	Schedule	Status	Action
1	21076	08/11/2014	ZHUANG	YANG	YINING	3-4 Years	Full Days [5 days a week]	Confirmed	Edit Delete
2	21077	08/11/2014	muralidaran	anand	Abhivachan	3-4 Years	Full Days [5 days a week]	Confirmed	Edit Delete
3	21089	08/15/2014	Pineda	Pauline	Andre	4-5 Years	Full Days [5 days a week]	Confirmed	Edit Delete
4	21090	08/15/2014	Sarabia	Jennizel	Ethan Mikel	2-3 Years	Full Days [5 days a week]	Confirmed	Edit Delete
5	21102	08/15/2014	Zhang	Mu	Zoey	2-3 Years	Full Days [5 days a week]	Confirmed	Edit Delete

The screen below shows all the detailed info entered by the prospective parents.

>> Reports Request Tour

Tour Request # **21230**
Date Submitted **09/08/2014**
Center Name **The Little Mud Puddles Learning Center**
First Name **Chaitali**
Last Name **Mody**
Email **chaitali_mody@hotmail.com**
Best number to call **(408) 603-5529**
Child's First Name **Eyal**
Child's Last Name **Thakkar**
Gender **Boy**
Potty Trained **No**
Date of Birth **11/08/2012**
Age Group **2-3 Years**
Schedule **Full Days [5 days a week]**
When Care Needed **1-3 Months**
Referred By **Yelp**
Tour Date Requested **09/11/2014**
Tour Time Requested **3:15 PM-3:45 PM**

Family Status

8. Center Tour Reports

>> Main Menu



[Process Center Tour Requests](#)



[Reports](#)



[Settings](#)

Select this

There are two different report available:

- Contact Me Report
- How Did You Hear About Us Report

[>> Reports](#)

Select a Report Contact Me Report ▼

Select a Center The Little Mud Puddles Learning ▼

Date From September ▼ 11 ▼ 2014 ▼

Date To September ▼ 11 ▼ 2014 ▼

Submit

Select one of 2 reports:

- Contact Me
- How Did You Hear About Us

9. Waitlist Online

The Waitlist Online module shares one configuration with the Center Tour under the Program Schedule Setup as explained above. You will notice that there is setting to flag if a particular program you offer has

Indicate if a program has a waitlist here

[>> Setup Program Schedule](#)

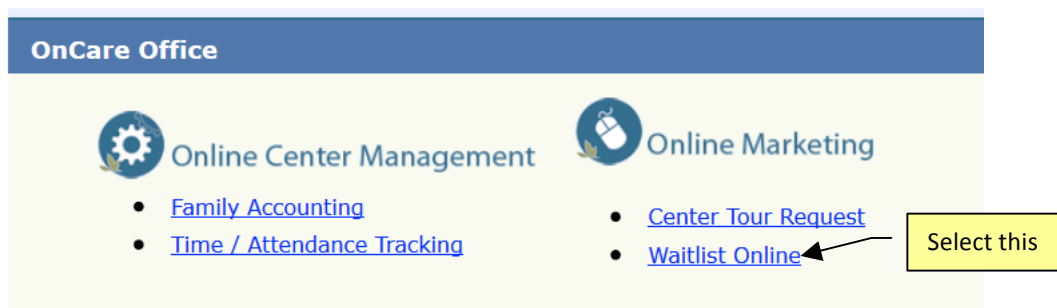
[Main Menu](#) | [General Settings](#) | [Setup Center Tour Schedule](#)

Age Group	Schedule	No of Days	(or) Day of the Week	Wait List
<div style="border: 1px solid #ccc; padding: 2px 10px;">2-3 Years</div> ▼	<div style="border: 1px solid #ccc; padding: 2px 10px;">Full Days</div> ▼	<div style="border: 1px solid #ccc; padding: 2px 10px;">5</div> ▼	<input type="checkbox"/> Mon <input type="checkbox"/> Tue <input type="checkbox"/> Wed <input type="checkbox"/> Thu <input type="checkbox"/> Fri	<input checked="" type="radio"/> Yes <input type="radio"/> No

If a program is flagged as been waitlisted, when a prospective parent select that program, the system will show the following message:



If a prospective parent chooses to join the waitlist, the system will provide a page to capture the parent and child information. Whenever a parent join the waitlist online, an email alert is sent to the Center Director.



Waitlist Online allows to set the Waitlist Fees (if applicable)


>> General Settings


Waiting List Fees

75

Submit

>> Main Menu


[View Wait List Online](#)


[Settings](#)

Select this

>> Waiting List Report

[Main Menu](#)

Waiting List

Click here

S.No.	WL#	Date Submitted	Last Name	First Name	Child's FN	Child Age	Schedule	Care Needed	Action	
1	19417	06/11/2014	Wilkins	Alexander	Alexander	3.2 years	Full Days [5 days a week]	1-3 Months	Edit	Delete
2	19418	06/11/2014	Hua	Jing	Jingwen	2.3 years	Full Days [5 days a week]	4-6 Months	Edit	Delete
3	19419	06/11/2014	Yue	Amy	Andrew	3.2 years	Full Days [5 days a week]	1-3 Months	Edit	Delete
4	19421	06/11/2014	Banoni	Sandra	Francoise	3.6 years	Full Days [5 days a week]	Immediate	Edit	Delete
							Full Days [5 days a week]	Within 1		

System displays the detailed information entered by the prospective parent.

>> WaitList - Family Details

Wait List Ref # **19417**

Date Submitted **06/11/2014**

Center Name **The Little Mud Puddles Learning Center**

Age Group **3-4 Years**

Schedule **Full Days [5 days a week]**

First Name **Alexander**

Last Name **Wilkins**

Mailing Address **3144Engine house d r**

City **Union city**

State **California**

Zip **94587**

Best number to call **(650) 862-8896**

Best Time to call **10 - 12 Noon**

Email **hanli816@163.com**

Child's First Name **Alexander**

Child's Last Name **Wilkins**

Gender **Boy**

Potty Trained **Yes**

Date of Birth **07/06/2011**

When Care Needed **1-3 Months**

Wait List Preference **Contact me when my schedule is available**

Referred By **Google Search**