THE NATIONAL LEAGUE OF JUNIOR COTILLIONS™

proudly presents

COTILLION MANAGER

A revolutionary tool designed to
manage student registrations,
classes, and tuition payments for
National League of Junior Cotillions

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COTILLION MANAGER : AN INTRODUCTION

We are pleased to introduce you to the newly designed "Cotillion Manager," a product developed by NLJC and Moonray to simply and efficiently manage student registrations, class schedules, chapter websites, student waitlists, and more.

We have carefully designed Cotillion Manager as a comprehensive tool for directors to use throughout the entire NLJC season. From the very first registration to the final ball, Cotillion Manager will store all of your chapter's data and information in one place. It will aid in chapter communications, student tuition tracking, and even prioritize wait lists. Online payment is directly tied to the Cotillion Manager for a seamless registration process for both parents and directors alike.
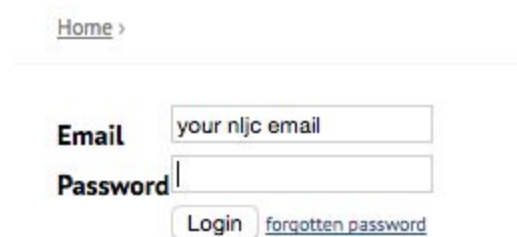
The following guide is a Step-By-Step Tutorial for setting up and using Cotillion Manager.

COTILLION MANAGER AT A GLANCE

1. Visit the following website (there is also a link at the bottom of the NLJC Corporate Home Page) :

http://nljc.com/n/index.php/login

2. When you see the following log - in screen, enter YOUR existing NLJC email address in the "Email" box. Your default PASSWORD is the zipcode (5 digits) associated with your chapter. You can reset this password by clicking the "Forgot Password" link, and a link will be sent to your email.

Home ›

Email	your nljc email
Password	
	Login forgotten password

Once you have identified the correct Email and Password, click "Login."

After logging in, the following screen will display.

| HOME | DIRECTORY / AWAITING PAYMENTS | CLASSES | REPORT | EMAIL | LOG OUT |

Home ›

WELCOME, Jane Doe

TEST – SARAH

TEST CHAPTER - SARAH

- Edit home page, View home page,
- Edit settings
- Edit blog posts, Photo albums
- Print nametags 2016-2017
- Print booklet labels 2016-2017, 2016-2017

JUNE ANNOUNCEMENTS

We are thrilled to introduce you to the new 'Cotillion Manager.' Announcements from the Corporate office will display here for all directors.

GENERAL FORMS AND TEMPLATES

Quick links, download forms, and templates.

Sample Form 1120 (PDF)

NLJC PRINT

Now that you're <u>logged in,</u> let's start by looking at the dashboard across the top for a brief overview.

The "HOME" tab will always return you to the HOME screen. This is also where you will access all of the Director Resources, Templates, Forms, and all documents previously housed in the "Admin Area."

The "DIRECTORY/AWAITING PAYMENTS" tab is where you will be able to manage, sort, and filter all existing student registrations. There are several ways to move, sort, and organize your students, but we will go into further detail on that later.
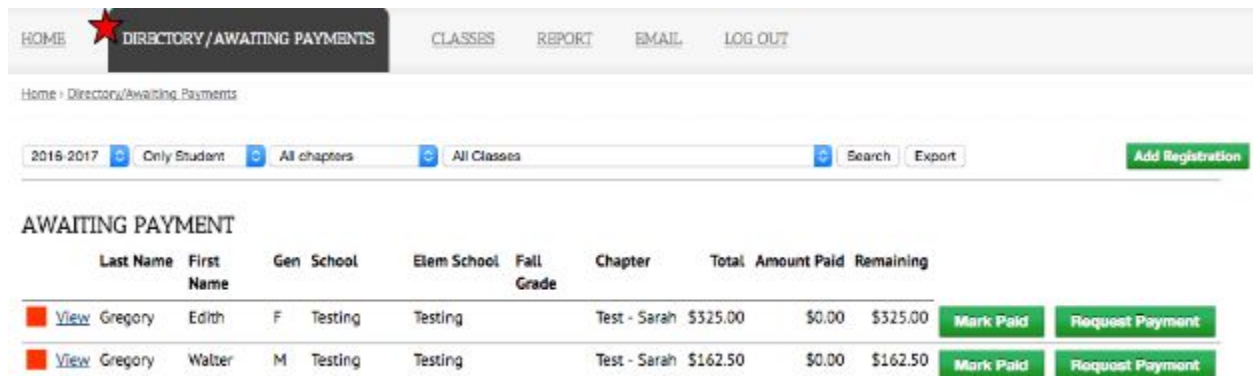
The "CLASSES" tab is where directors will create and manage classes within each chapter. Attendance, class dates, and location information for each will all be entered here.

The "REPORTS" tab is where corporate reports, new student totals, and other statistics will be calculated and submitted.

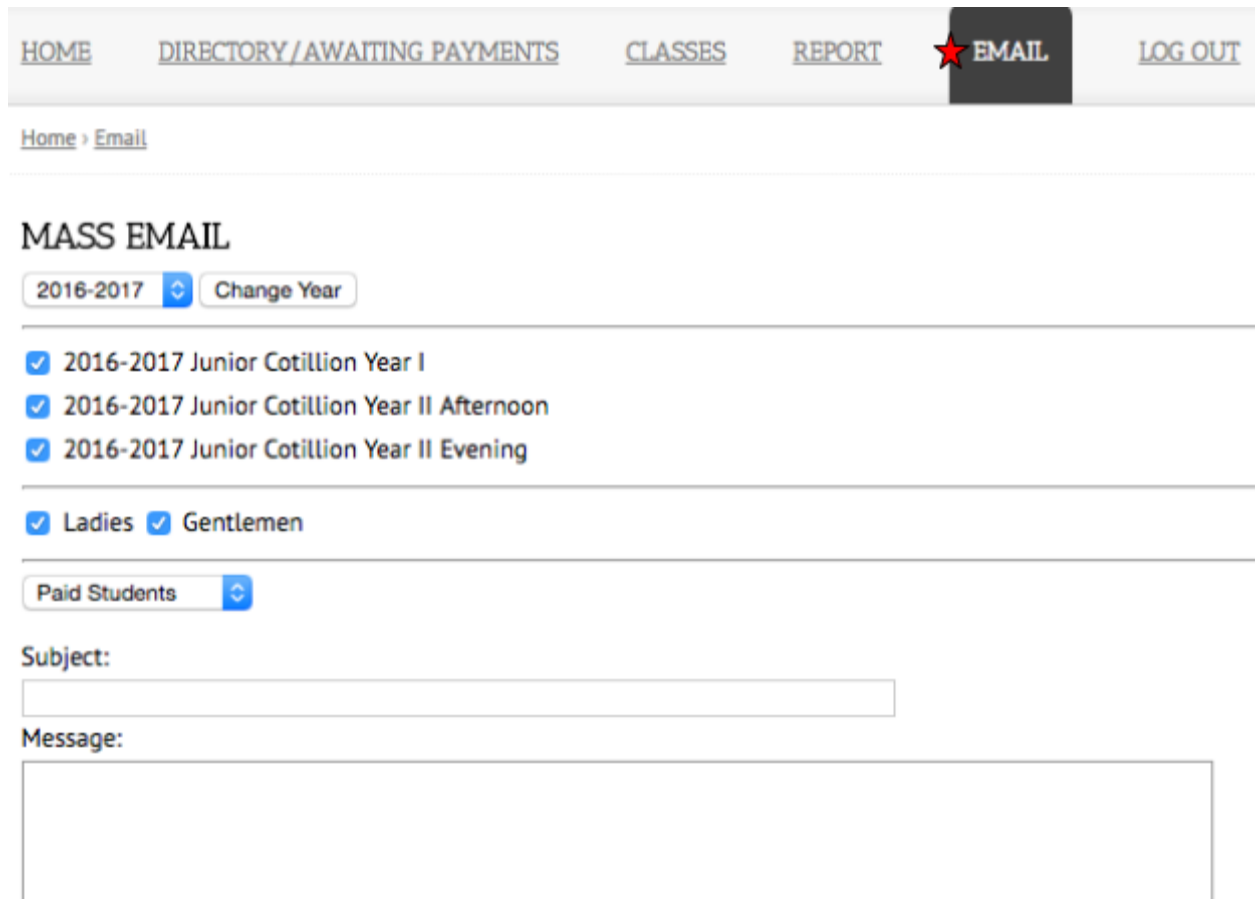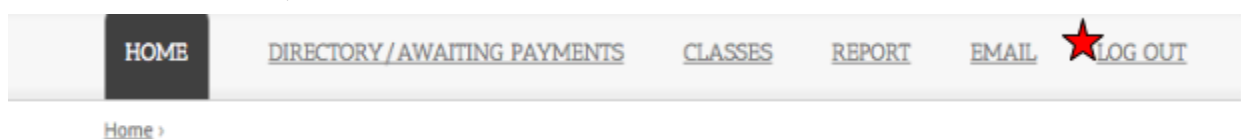The "EMAIL" tab will enable you to email classes or groups of students within each class. You may also attach a PDF (flyer, order form, etc.) to an email here.

| HOME | DIRECTORY / AWAITING PAYMENTS | CLASSES | REPORT | ★ EMAIL | LOG OUT |

Home › Email

MASS EMAIL

2016-2017 ⌄   [Change Year]

☑ 2016-2017 Junior Cotillion Year I
☑ 2016-2017 Junior Cotillion Year II Afternoon
☑ 2016-2017 Junior Cotillion Year II Evening

☑ Ladies ☑ Gentlemen

[Paid Students ⌄]

Subject:

Message:

The "LOGOUT" tab is self-explanatory - click to log out here. You will know you are "logged out" when you can choose to enter a username or password and LOGIN again.

| HOME | DIRECTORY / AWAITING PAYMENTS | CLASSES | REPORT | EMAIL | ★ LOG OUT |

Home ›

CHAPTER OPTIONS AND SETTINGS

Once you have logged in, you will first want to edit and personalize your Chapter settings. From the Home Tab, click "Edit Settings."
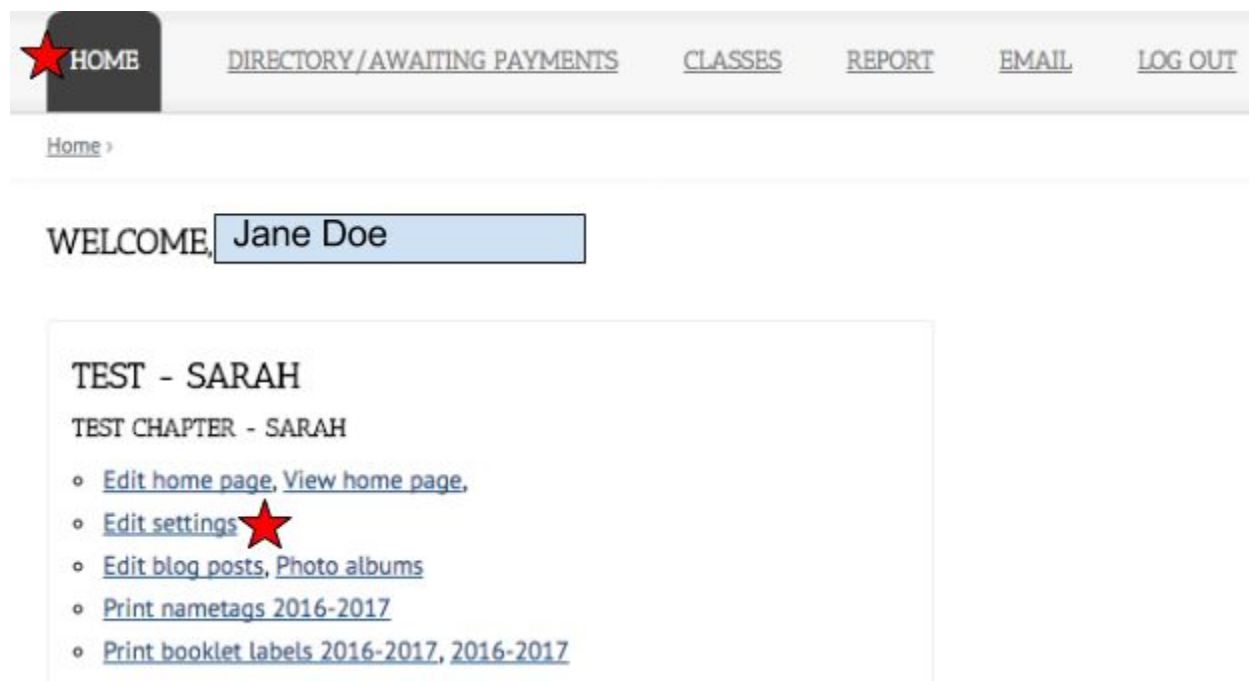
Once you have selected "Edit Settings," the following page will display.

#1. Fill in the blanks for your Twitter Account URL (if you have one), Instagram, and Chapter Facebook page. The mailing address should be an address where you receive mail and registrations for that chapter.

#2. Chapter Options and Settings
These options will allow you to enable or disable certain options.

"Allow Partial Payment" - This option, if enabled, allows parents or registrants to pay a partial tuition payment using paypal during registration. If you do NOT check this box, parents will be

required to pay in full (if they choose to use paypal to pay online) and partial payments will not be accepted.

#2. Chapter Options and Settings (continued)

"Allow Registrations" - This option allows directors to enable or disable registrations for this chapter. If you choose to accept registrations starting on August 1st, on August 1st, visit your Settings Page and check the "Allow Registrations" box, and your registration form will become available. If your chapter has reached your maximum registrants, simply uncheck the box and no more registrations will be accepted.

"Allow Payment at Registration" - This option enables directors to allow or disallow payment at registration. If you check this box, parents will be able to pay immediately upon registering for a class and submitting a payment form.

"Require Payment to be on the Waitlist" - This option allows directors to choose whether parents who register for a spot on a class's waitlist will be required to pay to hold that spot. If you do not require payment, parents will be able to register for a...
#2 Chapter Options and Settings, continued.

...waitlisted class and not required to pay immediately if using online payment.

#3. Registration Welcome Message:
Here you may add text to welcome parents to the registration form. This text will display on the top of the registration form (as shown below).

Registration

⭐Please refer to the classes page for class dates, times, and locations if you're uncertain of what class to register.

2016-2017 Student Information

Class Registering For *

[2016-2017 Test - Sarah Junior Cotillion Year I   ⬍]

Registration Type *

[Normal   ⬍]

First Name *

[   ]

Last Name *

[   ]

#4. Registration Thanks Message
The text you enter here will be visible to parents upon completing the online registration form.

#5. After Registration Thanks Email
This is the default text for the email that is sent to parents after they register. If you would like to edit this automated response, feel free to do so. Note, any text inside special brackets, for example ([{ PARENT NAME }]), is pulling information from a

database and will automatically fill in the email. You can move and change the text AROUND these database fields, but *do not* change how they are formatted or they will not work properly. If you need to return to the default at any time, simply clear the text and it will reset to the default upon refreshing the page.

#6. Sign-up On Waiting List
This text will display when parents opt to sign up for a waitlist spot. Consider this the alternate to the "Registration Thanks" text.
#7. Allowed Schools (One Line Per)
If you want to *only* allow students from certain schools to register for classes within that chapter, enter the names of each here and the parents will be asked to select the school from a drop down menu.

When you are finished updating your chapter settings, click the green SAVE button at the bottom of the page.

CUSTOMIZE YOUR CHAPTER WEBSITE

Return to the Home Screen (or visit the login link again if you're unsure of how to return to the Home tab).
http://nljc.com/n/index.php/login

Once you are back HOME, select "Edit Home Page."
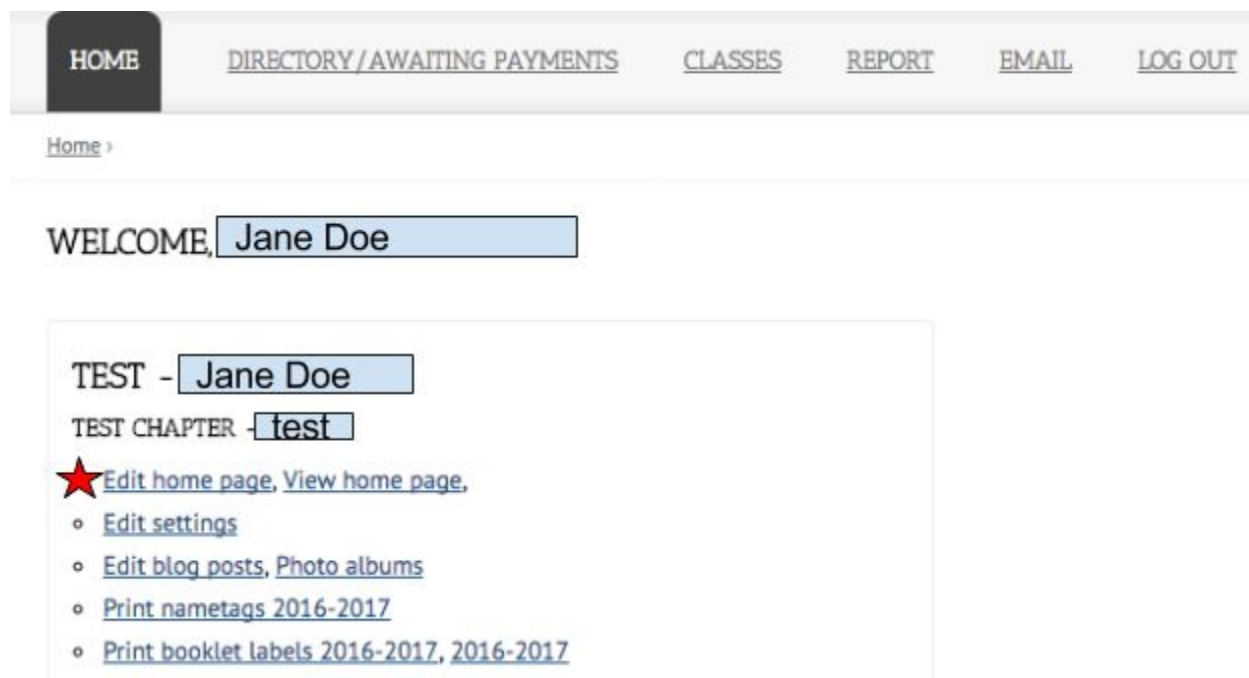
Note: At any time, you can click "View Home Page" to see your chapter website in its current state, as the public sees it.

Once you click "Edit Home Page," you will see a screen with the following boxes where you can enter information for display on your chapter's home page.

Welcome

| B | I | ¶ ▾ | ≣ ▾ | ≔ | ⊞ | ⊟ | % | 🖾 |

Thank you for visiting the test chapter of the national league of junior cotillions.

Announcements

| B | I | ¶ ▾ | ≣ ▾ | ≔ | ⊞ | ⊟ | % | 🖾 |

IMPORTANT ANNOUNCEMENTS HERE!!

About the Director

| B | I | ¶ ▾ | ≣ ▾ | ≔ | ⊞ | ⊟ | % | 🖾 |

My name is Sarah Strothmann and I have been a resident of North Carolina my entir
husband. I enjoy cooking, visiting the local farmer's market on weekends, and explo

Schedule Page

| B | I | ¶ ▾ | ≣ ▾ | ≔ | ⊞ | ⊟ | % | 🖾 |

Please see below for the complete schedule for Year I and Year II.

Save

Each box will allow you to add and edit text, insert a photo (within certain size requirements), and add numbered lists to the following sections of your chapter website:

● **Welcome -** Here is the welcome text that is displayed at the top of your home page.

● **Announcements -** Enter chapter announcements here. You may also upload an image if you choose.

● **About the Director** - Many directors will choose to upload a headshot or professional photo here. To do so, click the image icon (see star below) and upload a photo of your choice.

About the Director

● **Schedule Page -** The Classes page will display the class dates you will enter a little later in the setup for each class in the "Classes" tab, but here you may add text or images to appear at the top of that page.

AS ALWAYS, click the green SAVE button before continuing. You can VIEW your home page by clicking "VIEW HOME PAGE" once you have completed your changes.

CREATING YOUR CLASSES & SCHEDULE

Once you have created and personalized your chapter website and settings, you may begin creating CLASSES.

Classes are managed in the "CLASSES" tab, as shown below.

To start, you will have to create your first class. Click the "Add Class Group" button in the top right corner (see above).

You will see the "Add Class Group" page with as shown below.

Chapter

Test Chapter - Sarah

Year

2016-2017

Program

Junior Cotillion Year I

Class (optional)

Registration Fee

Registration Fee for Additional Children

Set to same price for no discount

Max signups

Ladies

Gentlemen

☐ **Hidden from public**

Class Description

| **B** | *I* | ¶ ▾ | ≡ ▾ | ☰ | ☲ | ☲ | | ⚲ | 🖼 |

Type something

Class Description Photo

Choose File   No file chosen

Save

Select the chapter (if you have multiple), and year first. Then, select the desired program from the list of options.

Next, type a Class Name of your choosing. It is important to note that this name will be visible to parents on your class schedule, so name it something you won't mind the public viewing on your

chapter site. For example, "Junior Cotillion Year 1 Afternoon Class" or "Junior Year 1 Class A."

Registration Fee : Enter the desired fee for the class.

Reg. Fee for Additional Children : If you choose to offer a discount to additional children registering for this class, enter that discounted price here. Set to same price for no discount. *Note: Enter the adjusted fee, not the discount amount.*

Maximum Signups: This is where you will set a cap for your registrations for each class. Choose the number of registrants you will accept for each gender before students will be directed to the waitlist instead. You can adjust this number at any time.

"Hidden From Public" - This box allows you to create a class that will not display on your public chapter website for parents to view. This may be helpful for directors who wish to create classes but not fill them immediately, or if you prefer to create one large

registration class (for all of Year 1) and then later move students into smaller classes.

The Class Description will display on the classes page of the chapter website. You may want to include a brief curriculum overview, general location information, or important class-specific registration dates.

If you would like to **upload a photo**, you may also do so on this page. Finally, click **SAVE** when you have finished each class.

Take a few minutes to create each class you plan to offer. Some directors may want to create large classes by grade for registration purposes and, after registration closes, sort all students by their school and create smaller classes from the registrant pool. Or, you can create the exact classes you plan from the beginning. It's your choice!

Once you have created the desired classes, you will need to add class meetings for each.

Click "Add Class Date."

Add Class Group

2016 - 2017 TEST - SARAH JUNIOR COTILLION YEAR I NEW CLASS 1

No students yet

Edit

View rollbook

⭐ Add class date

Select the date from the calendar (or type it if you prefer).

Class date   X

		June 2016				
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Add Class

You will also need to add a time, location, and name for each class. Once you have added all of your class meetings (and balls), these will display on the "CLASSES" page of your chapter website.

For example, if you enter the following into a new class meeting,

It will display on your cotillion manager as follows once saved:

Finally, this same class and class meeting will be visible on your

public chapter website as shown below. If you edit the class time/meeting location, etc. it will automatically update the class website accordingly.

Junior Cotillion Year I New Class 1

This is a test class.

REGISTER NOW

June 25th, 2016   **Test Class**   3:00 pm   Charlotte Country Club

At this point, you should create all the classes and class meetings you plan to offer. If you do not know the date or time, you must enter SOMETHING, or wait to add class "dates" until a later time. You are able to create classes without adding any "class dates," but if you create these class dates, you must enter a time, name, and location.

Once you have added all the classes and meetings you would like to add for each chapter, continue on.

MANAGING STUDENT REGISTRATIONS
(NEW AND EXISTING)

Before you start to manage, sort, and group your students, you will import an updated list of existing registrations. Please check the website for additional details on the import process.

NOTE: This import process will only apply to the 2016 registration process. After the formal transition to the new website, all new registrations will come to the NEW database and will not require additional import. Directors can manually enter registrations that are submitted via mail by clicking "Add Registration" from the Directory Tab and filling out the registration form.

There is a chance there will be some duplicates will occur in the initial import, and if so, simply open these registrations and select the "Delete Student" button. You will not be able to delete students once you have received payment, so this will only apply to students that may have multiple files due to a data import.

Once you have successfully imported your existing registrations, you will need to move these students into classes (as the classes will not have been available for them to select and register for if they registered using the "old" online form.)

It will be helpful to understand some basics about the DIRECTORY as you manage your student registrations.

Notice a few things:

1. You can select several criteria for displaying registrations. You can choose to show only certain years, only students

(or chaperones, etc.), and specific classes. If you want to only see one class at a time, or only one chapter's classes, use the filters to do so. If you would like to export a set of data, use the export button at the end of this column.

2. Students who are AWAITING PAYMENT will always show at the top in a separate section from the class they are a part of. As soon as they are marked as paid, their name will automatically move to the class (below).

3. You can "Mark Paid" any students in the Awaiting Payment area by selecting this button and entering a payment amount as follows:

4. You can also Request a Payment by selecting the "Request Payment" button. This will automatically send an email to the email addresses (primary and secondary) associated with that registration kindly asking for payment of the account balance.

a.

To aid in organizing students, SORT your columns by any of the headers. For example, you can choose to sort all students in a class (the imported group will be shown as a "class") by elementary school attended, current school, last name, etc. Simply click on the column title and it will sort alphabetically.

You can also move students in groups by checking the box next to each student's name and selecting a class to move to from the drop down menu that appears below.

For example, if I want to move all students from Abbotts Creek Middle School to another class, I would select as shown below:

This will enable to you move students from class to class with ease.

EDITING A STUDENT REGISTRATION

You may need to edit or update a student's registration file from time to time, whether to update an address, change or modify the remaining balance on his/her account, or add a new email address or chaperone.

To do so, simply select "View" to the left of the specific student's name as shown below:

		Last Name	First Name	Gen	School	Elem School
☐ ⭐ View		Brock	Elizabeth	F	Testing	Testing

You will then see the student's file. Notice the data displayed includes siblings, payments, chaperone information, and more. You can add or track payments, edit student information, or even drop a student from the class if they do not show up. See the next page for an example student registration.

Example Student : Elizabeth Brock

STUDENT(S)

« Back to Directory

ELIZABETH BROCK (TESTING) edit	$325.00 TUITION
2016-2017 Test - Sarah Junior Cotillion Year II Afternoon	Payment Amount
DOB: 2/1/2005 Gender: F	6/9/2016 $325.00
School: Testing	Add Payment
School: Testing	Paid $325.00
Current Grade: 5th	
Grade entering in fall: 6th	
Testing	
Testing, NC	
Testing	
Photo release: No	
	Drop from class

SETH BROCK (TESTING) edit	$150.00 TUITION
2016-2017 Test - Sarah Junior Cotillion Year I	Payment Amount
DOB: 4/1/2002 Gender: M	6/9/2016 $150.00
School: Testing	Add Payment
School: Testing	Paid $150.00
Testing	
Testing,	
Testing	
Photo release: No	
	Drop from class

PARENTS(S)

TESTING BROCK edit
Occupation: Testing
Email Address: Testing

TESTING BROCK edit
Occupation: Testing
Email Address: Testing

Once you have made any necessary updates, click the SAVE button in the bottom right and you will return to the Directory automatically.

THE WAITLIST

Cotillion Manager is fully capable of managing waitlists for your classes. Let's begin with how students will enter the waitlist.

Once a class is filled (to the capacity you have indicated when setting up the class in your CLASSES tab - a maximum of ladies and gentlemen), students will then be directed to register for a "WAITLIST" on the registration form. If Ladies are full, the online registration form will indicate "Ladies WAITLIST, Gentlemen Open," etc.

2016-2017 Student Information

Class Registering For •

✓ Choose One
2016-2017 Test - Sarah Junior Cotillion Year I (Ladies WAITLIST, Gentlemen WAITLIST)
2016-2017 Test - Sarah Junior Cotillion Year I New Class 1
2016-2017 Test - Sarah Junior Cotillion Year II Afternoon
2016-2017 Test - Sarah Junior Cotillion Year II Evening

As mentioned previously, you can decide whether or not you will require/accept payment to enter the Waitlist in your settings by

going to the Home tab, selecting "edit settings" and checking or unchecking the indicated box.

(HOME - Edit Settings - Require Payment for Waitlist checkbox)

Once students register for the waitlist for a class, they will receive an email indicating they have been placed on a waitlist.

You can view and manage the waitlist in the CLASSES tab.

2016 – 2017 TEST - SARAH JUNIOR COTILLION YEAR I

3 Gentlemen - 3 Ladies (1 waiting)

	Last Name	First Name	Gen	School	Elem School
☐ View	Brock	Seth	M	Testing	Testing

If you select the waiting student list, you will see the following screen:

WAITLIST 2016 – 2017 TEST - SARAH JUNIOR COTILLION YEAR I

LADIES WAITING LIST	GENTLEMEN WAITING LIST
#1 view Sally Late	Waiting list empty

Please note: The Waitlist will automatically sort students in the order in which they registered. Students in the #1 spot should be promoted to enter the class before students below.

In order to promote a student from the Waitlist to Registered, select "view" by the student's name.
You will see the "Move from Waiting List to Class" button. You can also drop students if they are unable to obtain a space.

STUDENT(S)

« Back to Directory

LATE SALLY edit $300.00 TUITION

2016-2017 Test - Sarah Junior Cotillion Year I   Add Payment

Move from waiting list to class

DOB: 1/1/2011 Gender: F

School: test school

School: test school

Current Grade: 6th

Grade entering in fall: 7th

test
test, TN
27138

Photo release: No

Drop from class

CHAPTER COMMUNICATIONS

Another feature of the Cotillion Manager you will find useful is the Mass Email. Here, you can email groups of students with text or PDF attachments easily. Simply select the group of students you would like to email, type the email and subject, add any desired attachments, and send.

CORPORATE REPORTING

Corporate Reporting is simple. To report student totals, tuition payments, etc., select the year, chapter, and month for which you would like to submit a report and click "REPORT." A report will be sent to the Corporate Office automatically with the selected information.

2016 ⬍	January ⬍	All chapters ⬍	Report

TEST CHAPTER - SARAH

2016 - 2017 TEST - SARAH JUNIOR COTILLION YEAR II EVENING	Tuition	Payment Date	Payment Amount	Remaining
Hilla, Bethann 12416 Browder Street, Raleigh, NC, 27614 Wakefield Middle School		$325.00 6/9/2016	$325.00	$0.00
Coleman, Pearl Testing, Testing, , Testing Testing Testing	$0.00			$0.00

Each class report shows students and tuition payment information, and refunds and student counts below.

REFUNDS THIS PERIOD

Name	Date	Amount
Tyler, Lora	6/9/2016	$-200.00
Warren, Kate	6/9/2016	$-200.00
Total Refunds		$-400.00

NEW STUDENT COUNTS

Program	New Students
Junior Cotillion Year I	5
Junior Cotillion Year II	7
Total New Students	**12**

SUPPORT

If you have any questions as you set up your chapter website, manage student registrations, etc., please do not hesitate to contact the NLJC corporate office via phone or email. One of our staff members will schedule a private appointment for you as soon as possible where you will receive one-on-one help during the setup and transition process.

As always, we are always just a phone call away.

Thank you! We hope you enjoy the new capacities of this system, and that it both simplifies and enhances your programs.

Sincerely,

NLJC Corporate Staff & Moonray Web Designs