

GUIDE: CLASS RESERVATION & PAYMENT PROCESS

(including 10-Class Packs & Gift Certificates)

1) **SCHEDULE** page of YCOM website:

- a. SIGN UP for an **Acuity account**, if you do not have one yet. This will give you a username and password to use to login from then on.
- b. LOGIN to your account, if you do have one. Then the SIGN UP and LOGIN buttons will be replaced with your own email-login.
- c. EMAIL-USERNAME: When this is visible, you can click on it to get a short drop-down menu with these options:
 - i. APPOINTMENTS: See a list of all upcoming class reservations. By clicking on the 3-dot button next to each reservation, one has the option to:
 1. ADD TO a digital CALENDAR (iCal, Outlook, or Google)
 2. RESCHEDULE (change to another date for the same class)
 3. CANCEL (but 'Reschedule' is generally best, if possible)
 4. EDIT INFO (only applies to one's Health Testament)
 - ii. MANAGE CODES: Handle each code, if you have one, for:
 1. GIFT CERTIFICATE
 2. 10-CLASS PACKAGE
- d. INSTRUCTIONS: Please read until familiar with them.
- e. **FIRST-TIME REGISTRATION**: Required of anyone who has not attended a YCOM class since the Covid pandemic. An 'appointment time' must be selected, but this is just a placeholder for filling out the form and waiver.
- f. **DROP-IN CLASSES**: A list of all the classes that accept individual drop-ins (committing only to one class at a time). Please pay attention to any added notes regarding subbing teachers, exceptions for Zoom-only classes, etc. A class listing for 'sub' class at the same time may appear immediately below the regular listing.
- g. **UPCOMING SERIES**: A list of all the classes which require a commitment of multiple dates. Pre-payment is generally required for a series, and it will include one free class if all classes are attended. Reservations must be made before the series begins.
- h. **GIFT CERTIFICATES**: A gift package of 5 classes which is available all year long with a printable certificate. A code is used to make reservations (see 'Manage Codes' above).
- i. **10-CLASS PACK**: A set of 10 classes paid for all at once in advance. Each class credit is claimed using a code (see 'Manage Codes' above).

2) **MAKING A CLASS or SERIES RESERVATION**

- a. BOOK button: Click on this button next to the class, series, or other item on the list to select it.
 - i. **CLASS**: you will next see a window with a calendar of available dates for that class shown in bold.
 1. **DATE SELECTION WINDOW**: Click on the (first) one you would like to reserve, and you will be shown the available time in a box to the upper

right. Click on that box to confirm, and then you will be given a short list of options:

- a. **SELECT & CONTINUE:** To reserve that class only.
 - b. **SELECT & ADD ANOTHER:** To add one more date at a time.
 - c. **SELECT & MAKE RECURRING:** To add a set of dates all at once. Start by choosing how many in a row you would like; you can always remove one or more dates later from the list that will be created for you, and you can always cancel or reschedule any of your reserved dates later.
 - d. **CONTINUE:** Clicking on the 'Continue' on that page will take you to the 'Your Information' page.
2. **'YOUR INFORMATION' PAGE:** If you are logged in to your account, the needed info will be pre-entered for you; otherwise, you will need to enter all the basics (name, phone, email). [Note: You can still go up to the top of this page and login, if you like.] On the top right is a space labeled 'Package, Gift Certificate, or Coupon Code'. This is where you can enter a 'Member' code, if it applies to you, or a specific code for a Gift Certificate or 10-Class Pack, if you have one. Then, everyone needs to read and check off the Health Testament. Lastly, you can click on one of two buttons on the bottom of that page:
 - a. **CONTINUE to PAYMENT:** This will take you to the Payment page.
 - b. **RESERVE without PAYING:** This option is mainly offered for those who have a credit to use from a previous class which they could not attend. We encourage everyone to make payment online when making a reservation. If you feel you must pay with cash or check at the studio, you may use this option.
3. **PAYMENT PAGE:** If you 'Continue to Payment', you will be taken to this page to enter your credit or debit card info for processing. If you like, you will have a chance to have your info saved securely for future payments. You will also have a second chance to enter a code for a Member discount, Gift Certificate, or 10-Class Pack. Once the needed info is provided, you can click on the 'Pay & Continue' button to finalize your reservation.
4. **CONFIRMATION PAGE:** Finally, your reservation is shown in confirmation, along with several last options:
 - a. **PAY BALANCE** (if you reserved without paying)
 - b. **CANCEL** (though it's best to 'Reschedule' whenever possible)
 - c. **RESCHEDULE** (automatically carrying payment forward)
 - d. **EDIT INFO** (only for changing your Health Testament)
5. **CONFIRMATION EMAIL:** You will automatically receive a confirmation email soon after making a reservation, which will contain buttons for those same options. It can be useful to save that email until the class, in case you need to cancel, reschedule, or pay later.
6. **REMINDER EMAIL:** If you make your reservation more than 24 hours before the class time, you will also receive a reminder email with those same options offered once again.

- ii. **SERIES:** you will next see a window with a complete list of the dates scheduled for the classes in the series. While they are generally held weekly, please note that there may be a week skipped and another one added onto the end of the series. Click on the 'Continue' button to accept the listed dates, and then you will follow the path outlined above for a CLASS reservation (see YOUR INFORMATION page and the PAYMENT page).

3) PURCHASING a GIFT CERTIFICATE or 10-CLASS PACK

- a. **ADD to CART:** Clicking on this button takes you directly to the YOUR INFORMATION page and then the PAYMENT page (described above).
- b. **CONFIRM PURCHASE:** Once you click on this button on the bottom of the PAYMENT page, you will be given the appropriate CODE to access the CLASS CREDITS that you have just purchased (including a printable page for the GIFT CERTIFICATE).
- c. **NAME PROVIDED on the INFORMATION page:** The name under which either of the above are purchased should be the one who will be using the CLASS CREDITS. In the case of the GIFT CERTIFICATES, that would be the recipient of the gift. They will have a chance to sign up for an Acuity account when they first start to use the certificate.
- d. **NAME PROVIDED on the PAYMENT page:** The name of the purchaser will be taken on the PAYMENT page.

4) RESCHEDULING, CANCELING & REFUNDS

- a. **RESCHEDULING:** The Co-op always recommends that you consider rescheduling a reservation, instead of cancelling, if at all possible. Rescheduling will carry any payment forward and avoid dealing with a complicated refund.
 - i. **CHANGING CLASS 'TYPE':** You can reschedule as many times as needed, but you can only reschedule for the same teacher/day/class in the Acuity system. If you need to transfer your payment to a different class type, you can make a new reservation for that, use the 'Reserve without Paying' option (see above), and then use the 'Support' button to send an email noting this transfer, so that our bookkeeper will understand the connection.
 - ii. **TOO LATE to RESCHEDULE:** If you don't have time or forget to reschedule or cancel a paid reservation before the class starts, you can either let your teacher know or contact Support to let us know. Teachers and the scheduling administrator can make such changes after the start of class. (See 'Support' button at top of Schedule page, or email 'pay@yogacoop.com'.)
- b. **CANCELLING with REFUND:** If you know that you cannot use a reservation and cannot use your payment for another class, you are welcome to cancel it and request a refund. It is not automatic. You will need to request it by using the Support button at the top of the Schedule page or emailing 'pay@yogacoop.com'.
- c. **CANCELLING without REFUND:** If you know that you cannot use a reservation and cannot use your payment for another class, you are welcome to cancel it and NOT request a refund. It will be gratefully accepted as a donation to the Co-op. If you would like to clarify your intentions, please use the Support button at the top of the Schedule page or email 'pay@yogacoop.com'.

FAQ: ACUITY SCHEDULING & PAYMENTS -- STUDENTS

How do I get an ACUITY ACCOUNT? (recommended)

Use a phone, tablet, or computer to go to the Schedule page of the YCOM website (yogacoop.com/schedule) and follow the instructions there. (There's a QR code posted on the desk at the studio, too, which takes you straight to that page.) Also, there's an Acuity Scheduling app you can download onto your phone.

In the upper right corner of the Schedule page are two buttons: one to LOGIN, and one to SIGN UP (for an account). Click on the latter for a simple process to create an account with Acuity (the scheduling system), so that you can make a reservation more easily, keep track of the reservations you've made, and make any necessary changes to them (reschedule or cancel).

How do I make a CLASS RESERVATION?

Use a phone, tablet, or computer to go to the Schedule page of the YCOM website (yogacoop.com/schedule) and follow the instructions there. (There's a QR code posted on the desk at the studio, too, which takes you straight to that page.) Also, there's an Acuity Scheduling app you can download onto your phone.

How do I PAY for a class?

There are currently several options for this: (NOTE: Digital payments are always preferred.)

(a) **Credit/debit card** payments can be done easily at the time of registration near the end of the process. (YCOM encourages this method, as it is less demanding of our limited volunteer work time.) They can also be done later with a button provided in the confirmation email or by logging into your Acuity account (if you have one—always a good idea) and checking your list of 'Appointments' from the drop-down menu upon clicking on your email (top right corner).

(b) **Checks** for all classes should be made out to the **Yoga Co-op of Madison**; they can be dropped off at the studio or mailed to YCOM's address (812 E. Dayton St. #200, Madison WI 53703); please include the teacher's name and class date(s) in the memo of the check or attach a note with that info.

(c) **Cash** is still acceptable (though it is much harder for us to process); please be sure to attach a note to it, including your name, the teacher's name, the class date(s) it is for, and the amount.

FAQ: ACUITY SCHEDULING & PAYMENTS -- STUDENTS

How do I register for MORE THAN ONE CLASS at a time?

After clicking on your first choice for a class date on the calendar, you will be given three options: (1) 'Select and Continue' (without any more reservations), (2) 'Select and add another time' (to add one more at a time), or (3) 'Select and make recurring'. Choosing that last option will allow you to determine how many weeks in a row you'd like to reserve that class. You can always remove any particular date in the sequence now or reschedule a class later, if a conflict arises. (*NOTE: There is no discount for multiple classes.*)

Can I reserve and pay for classes with MORE THAN ONE TEACHER at a time?

Unfortunately, no. You must pay for classes of each 'type' (teacher/day/time) separately. Then you can use the 'Schedule Another Appointment' button on the final confirmation page to return to the full schedule and make a reservation for another teacher (or 'class type').

How do I RESCHEDULE a class?

There are two easy ways to do this—and one fallback option:

(NOTE: It's always better to reschedule, as opposed to canceling.)

- (1) If you saved the confirmation email you received for the class reservation (always a good idea), you will find a button there which allows you to change or cancel that.
- (2) If you have signed up for an Acuity account (also a good idea!), you can login and use that drop-down menu to see a list of all your upcoming 'Appointments' (class reservations). Find the one you want to change or cancel and click on the 3-dot button on the far right of it to see the options available and follow the instructions.
- (3) If neither of those options work for you, please use the 'Support' button at the top of the Schedule page to send an email to the Scheduling Administrator, explaining what you are trying to do, and you will receive some assistance as soon as they are available.

How do I CANCEL a class reservation and receive a REFUND?

It's always easier and better to reschedule than to cancel, but if you don't expect to take that particular class again and need to cancel, you can follow the same instructions as for rescheduling and choose the 'Cancel' option instead. Then you need to use the 'Support' button at the top of the Schedule page or email 'pay@yogacoop.com' to request a refund. You will receive a refund in 5-10 business days, if you paid online; otherwise, it may be 10-15 days.

How does the ‘RESERVE WITHOUT PAYING’ option work?

This option is available for those who feel it absolutely necessary to pay with cash or check. YCOM prefers that all payments be made digitally in order to make the most efficient use of our volunteer labor for handling them. If you are reserving multiple classes, it is much simpler to pay for all of them during the initial reservation process; otherwise, you will have to pay for each one individually. There will be a ‘Pay for Class’ button on your confirmation and reminder emails for this purpose. (Also see ***“How do I pay for a class?”*** above.)

How do I get the MEMBER DISCOUNT for my class reservations?

If your membership is currently paid up, you can get the member discount by entering the code ‘MEMBER’ on the line in the upper right corner of the ‘Information’ page, labeled ‘Package, Gift, or Coupon Code’. Be sure to click on the ‘Apply’ button, and then it will display the discount.

Do I need to use the ‘Member’ discount code every time I register for classes?

Yes, you do. Since YCOM is not using this system to handle our membership dues, it does not keep a record of who is or is not a member, which can change over time.

Is the ‘FIRST-TIME REGISTRATION’ a real ‘appointment’ for a day and time? Do I need to cancel it?

No, it is not a real appointment of any kind. It is just a placeholder for the registration process to occur. You can ignore all references to an appointment, and you do not need to cancel it.

Will Acuity SECURELY STORE and remember my credit/debit card info?

Yes, as long as you check off the box which confirms your permission for them to do so, which will show up on the payment page when you get there.

Can I RESCHEDULE for a class at a DIFFERENT TIME or TEACHER?

The Acuity system will only allow you to reschedule for a class of the same ‘type’ (teacher/time/day). However, you can reserve another class ‘type’ and ask your teacher or the bookkeeper (via the ‘Support’ button on the Schedule page or email ‘pay@yogacoop.com’) to transfer your original payment to the new class.

How do I use a GIFT CERTIFICATE or a 10-CLASS PACKAGE to pay for my class reservation(s)?

There are two ways to handle this:

- 1) The easiest way is to make sure you sign up for an account with Acuity (see above). Then, once you login on the Schedule page, you can click on your email/username to get a drop-down menu, which includes an option to 'Manage Codes'. If you enter the code for your gift certificate or 10-class package here, then you will be given credit for it once you get to the payment page.
- 2) If you don't login before selecting class(es), you will have an opportunity to enter the necessary code on the Information page on the line labeled 'Package, Gift, or Coupon Code'. Be sure to click on the 'Apply' button, and then it will display the credit.