

Setup (One-time actions)

1 Center Setup

In iCare Admin go to *Setup* >> [Get Started](#) and fill the following tabs:

- General Information
- [Business Model](#)

In iCare Admin go to *Setup* >> [Parent Portal Setup](#) and set up:

- Incoming and outgoing email addresses
- Your preferences for the parents

2 Create Classes and Camps

In iCare Admin go to *Classes/Camps* >> *Classes/Camps* ▼ >> [Classes Setup](#) form and create your offerings with the following details:

- Start and End Date
- Billing Rate
- Sites and Instructors
- Scheduling flexibility offered to parents

3 Invite Parents to the Parent Portal

Give the URL for [Parent Portal](#) to all the parents. Additionally, display the link on your website. On the Parent Portal parents can:

- Enter [child and family data](#)
- [Register children in classes](#)
- [Pay online](#)
- Read and respond to notes and [messages from teachers](#)

4 Invite Teachers to the Teacher Portal

Give the URL for Teacher Portal to all the teachers. On the portal teachers can:

- Check [class roster and schedule](#)
- Enter [class attendance](#)
- Write children's [activity and development notes](#) and respond to parents

5 Enroll Staff

Enter all staff in iCare Admin through [Staff >> Data](#) >> *Add*. Assign each staff to a Program/Room.

6 Set Up iCare Lobby to Record Attendance

Set up an [iCare Lobby](#) kiosk using a PC, Mac, laptop or tablet in the lobby. You can use it for the following:

- Have parents and staff [check-in and out](#).
- [Read messages](#) and answer [RSVP questions](#).

You can also create lobby passwords for [batch check-in](#) for classes.

7 Set Up Payment Processing

Set up a Merchant Account, and ask parents to view their account statements and make payments through Parent Portal.

Everyday Things

Add New Classes and Camps

To add or drop new classes and camps do as shown in the Create Classes and Camps section.

Registrations and Waiting List

For the following actions go to *Classes/Camps* >> [Classes/Camps](#):

- You can [register children in classes yourself](#) if you are not having parents do the registrations themselves.
- To confirm the registration of a child in [waiting list](#) double-click on a child's name in the class participation list.
- To [drop a child](#) already registered in a class double-click on a child's name in the class participation list.

Check Bills and Enter Payments

- Check family and subsidy account statements to see if recurring bills are populating as expected. (*Accounting* >> [Accounts](#))
- If not using Parent Portal for online payments, then enter payments through the single or batch payment entry forms. (*Accounting* >> [Payments](#)) (*Accounting* >> *Payments Drop-Down* >> [Enter Batch Payments](#))
- Enter Miscellaneous Charges or Credits through *Accounting* >> *Account Register*.

Enter Children's Daily Activities and Development Notes

- Enter children's activities and development notes. (*Children* >> *Family Data* >> [Child Notes](#) link in the footer) (*Left Panel Child List* >> *Right-click* >> [Enter Note...](#))
- Note: parents can read the notes and respond to messages through the Parent Portal.

Quick Tips

SMS/Email

- Send SMS text messages or emails through *Left Panel Child List >> Right-Click >> [Send SMS or Email](#)*
- From any report, right-click on a child or family member and choose *Send SMS or Email*

Alerts and Notifications

- **Automatic Alerts to Parents or Administrators:** Set automated alerts – like overdue balance, immunization shots or last physical – to be sent by SMS or email. (*Message Center >> [Alerts Setup](#)*)
- **Parent Portal Notifications:** Get notified when parents enroll children or update schedules online through Parent Portal (*Setup >> [Parent Portal Setup](#)*)

Reports

Commonly Used Reports

- **Admin Reports** (*Classes/Camps >> Classes/Camps >> Admin Reports*)
- **Teacher Reports** (*Classes/Camps >> Classes/Camps >> Teacher Reports*)
- **Accounting Reports** (*Classes/Camps >> Classes/Camps >> Accounting Reports*)
- **Parent Reports** (*Classes/Camps >> Classes/Camps >> Parent Reports*)
- **Children's Attendance Report:**(*Children >> Attendance Drop-Down >> Attendance Reports >> Attendance Report*)
- **Staff Attendance Report** (*Staff >> Attendance Drop-Down >> Attendance Payroll Hours Report*)
- **Account Balances** (*Accounting >> Accounts Drop-Down >> Account Balances*)

Report Tips

- **[Modify Filter](#):** Allows you to filter the time period or any column in the report.
- **[Excel](#):** Export all data directly to Excel.
- **[Related Reports](#):** Allows you to quickly find related reports.
- **[Views](#):** Use the tabs to switch between Working View and Printer View.
- **[Right-Click](#):** Right-Click on any cell in the Working View for Accounting, Messaging or Mathematical actions