AMT Phase 2 - Statement of Work

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1. Setup Workspace

Given the updated scope of this project, the Drupal CMS will be used in place of the WordPress CMS. Out of the box, the Drupal CMS is a better fit for the larger scope of the project, and is better equipped to handle more complex use cases.

1.1. Installation

Drupal will be installed and configured in preparation of a full site build. Several tools and libraries will be used to facilitate site functionality and development.

1.2. Theme

A fully custom theme will be built based on the Bootstrap Framework. The Drupal CMS has a different templating standard that is better suited to facilitate the efficient development of a custom theme in place of a pre-built contributed theme.

1.3. Modules

Drupal contributed modules are free, so no contributed modules or plugins will need to be purchased. Some functionality may be dependent on 3rd party functionality that may require purchase or subscriptions.

2. Users

2.1. User Roles & Capabilities

Currently all users on the system are staff users. Additional roles and user information can be added to the system in a later phase.

2.1.1. Developer

Developers are responsible for site management, maintenance and deployment of new features.

2.1.2. Site Administrator

Admin users are responsible for site management and maintenance. These users have full access to site tools and configuration with the exception of developer tools. They should have access required to perform basic site management operations and assist users with site activities.

2.1.3. Studio Director

Studio Directors are responsible for managing and overseeing their Studio. They will have access to all features on the site

2.1.4. Studio Manager

Studio Managers are responsible for managing the studio. They have access to financial data, can schedule events for all staff members, and generate reports.

2.1.5. Instructor

Instructors are primarily responsible for managing their own schedule and teaching classes. As a result, instructors will be able to view scheduling data for themselves and all fellow instructors. Instructors will also be able to view most data associated with their students.

2.1.6. Executive

Users can be marked as an executive for a secondary role. This doesn't change the permissions of the user on the system at all, rather it is used to define which users will appear in select filtered lists when creating chat services and enrollments. The role is meant to indicate the primary staff members who are responsible for a sale.

2.2. Login Redirects

When staff users log into the system, they will automatically be redirected to the appropriate day view to view their schedule. Any users that don't have a staff user role will be directed to their user profile in accordance with Drupal's default behavior.

2.3. User Record

2.3.1. Add Staff Field List

- First Name (textfield)
- Last Name (textfield)
- Email (Email)
- AMI-ID (textfield)
  Currently provided by the client
- Legacy ID (textfield)
  The ID for this teacher in the legacy system. Used for mapping purposes during content Imports.
- Teacher Category (term reference)
- Availability (office hours field)
  Staff availability and the lesson types they teach will need to be assigned using custom functionality.
- Lesson Types (term reference)
  A list of lesson types taught by this teacher. Used to determine whether the instructor is a valid option for a given lesson type.

3. Content Types

3.1. Students

3.1.1. Student Record

3.1.1.1. Contact Field List

- First Name (text field)
  First name of the Student
- Last Name (text field)
  Last Name of the Student
- Address (address field)
  Address of the Student
- Home Phone (phone number)
  Home Phone number of the Student
- Cell Phone (phone number)
  Cell Phone Number of the Student
- Notification Preference (select list)
  - Text
  - Email
  - Both
- Student Image (image)
  An image that is used to help identify the student.
- Gender (radio) (Male/Female)
  Gender of the Student

3.2. Student Accounts

3.2.1. Student Account

3.2.1.1. Add Student Field List

- Inquiry/Student (Boolean)
  Option to classify student account as “Inquiry”
- Inquiry Method (text select list)
  Method the student used to inquire
- Inquiry Taker (Staff reference)
  Who spoke to the student during the inquiry
- Inquired (date)
  Date the student inquired
- Booked on (date)
  Date the student booked the first lesson
- Showed (date)
  Date the student’s first lesson was showed
- Notes (text area)

Additional notes about the student

- Teacher (Staff Contact reference)
  Who will be teaching the student
- Contacts (Student Contact reference IEF - Multi Value)
  Student Record associated with the student account
- Lessons Available (integer)
  Value indicating how many unused lessons the student currently has paid for.
- Low Lesson Threshold (integer)
  Defines how many lessons left is considered low. This is used to determine when an instructor needs to approach a student about purchasing more lessons. This threshold applies to the total lesson count of all types combined for the student.

3.2.1.2. Display of "Students' Personal Page"

- Student Basic Information
  The student basic information section displays all the data entered when creating a student.
  - Student Information
    - Student Name
    - Cell
    - Email
    - Gender
  - Inquiry Fields
    - Booked On
    - Enrolled
    - Inquired
    - Inquiry Method
    - Showed
    - Inquiry Taker
    - Notes

3.3. Packages

3.3.1. Package

3.3.1.1. Package Creation Field List

- Lesson Type (term reference)
  Lesson type refers to the type of lessons purchased in this package
- Abbreviation (textfield)(Originally Package Code)
  An abbreviated version of the packages' name.
- Name (textfield)
  The name of the package.
- SPS Code (term reference - select list)

- Lesson Price (price)
  Price of the individual lessons in the package
- Lesson Count (integer)
  Amount of lessons in the package
- Total Price (price)
  The total price the customer is paying for the package. This should be able to override the lesson price and lesson count
- Additional Notes (text area)
  Description of the package and any special notes regarding its use.

3.3.1.2. Display of "Package View"

The package view displays all the details of the package selected (See section 7.1.6)

3.3.2. Enrollment

3.3.2.1. Add Enrollment Field List

- Student (Student Account Reference)
  Reference to the student who purchased the enrollment.
- Doc ID/Legacy ID (textfield)
- Sale Date (date)
  The date the enrollment was purchased.
- Category (term - Enrollment Type)
- Package Name (Package Reference)
  Reference to the Package the enrollment is attached to.
- Lesson Price (integer) (Override)
  Override field allowing site admins to specify the cost of each lesson.
- Lesson Count (integer) (Override)
  Override field allowing site admins to specify the number of lessons included in the enrollment.
- Total Price (integer)
  Sum of all lesson costs
- Lesson Used
  This value is a running total of the number of lessons for this enrollment that have been used.
- Lessons Paid
  This value indicates how many lessons have been paid for. It is updated whenever a new payment is attached to the enrollment. Lessons paid is calculated by dividing the total amount that has been paid by the lesson price, rounded down.
- Lesson Available
  This value indicates the number of lessons left in the enrollment. It is updated whenever a lesson is used or a payment is added.
- Executive (executive user reference)

Limited to instructors that are marked as executives

- Junior Executive (staff reference)
  Staff member who made the sale
- Instructor (instructor reference)
  The Teacher of the lesson
- Payment interval (integer)
  Used to in combination with the interval unit to determine how often a payment is expected for this enrollment.
- Interval Unit (text select - Week/month)
  Type of payment interval (Week/month)
- Enrollment Status (select list)
  The status of the enrollment. Defaults to Open, but can be closed or marked as dropped as necessary. Enrollments are automatically marked as closed when the lesson count for the enrollment is reached.
- Dropped Date (date)
  The date that the enrollment should be considered dropped. Only visible on the enrollment drop interface.
- Dropped Amount (float)
  The dollar amount that is left unpaid and being dropped from the enrollment. Only visible on the enrollment drop interface.
- Next Scheduled Payment (date)
  The date of the next scheduled payment. Automatically updated when the enrollment is saved.

3.3.2.2. Dropping Enrollments

An alternate Enrollment Drop form interface will be available from the enrollment edit page, allowing Studio Managers and Studio Directors to assess and potentially drop an enrollment. Upon saving the enrollment drop, the user will be redirected to the relevant AMI reports to assist them in submitting the relevant data to AMI. Only fields relevant to the enrollments current balance and status will be visible on the enrollment Drop Interface.

3.4. Payments

3.4.1. Payment

3.4.1.1. Payment Fields

- Payment ID (textfield)
  Payment identifier
- Customer Name (textfield)
  Name of the Customer
- Date and Time (date)

Date of Payment
- Gross Tuition (price)
  Total amount paid
- Student (Student Reference)
  Name of student
- Enrollment (Enrollment Reference)
  Name of enrollment type
- Payment Type (term reference)
- Status (Text Select List)
  Status of the payment

3.5. Attendees

3.5.1. Attendance

3.5.1.1. Add Attendance Field List

3.5.1.1.1. Student Account (student account reference)
The student account that this attendance record is for.

3.5.1.1.2. Students (contact reference)
Automatically populated with all contacts on the Student Account. Students can be removed from this section if not all members of the Student Account will be attending the lesson. Each contact will display supplemental information about the student such as a profile image and basic contact information.

3.5.1.1.3. Enrollment (selective Enrollment)
Dropdown menu that displays the available enrollments for the selected student account, as well as an additional default value to indicate that the lesson is a comped lesson. Defaults to comped.

3.5.1.1.4. Status (Select List)
Indicates the status of the attendance record. The possible statuses an attendance can have are:
- Showed
- No-Showed, Charged
- No-Showed, Not Charged
- Rescheduled
- Canceled

3.5.1.1.5. Description (text area)
A simple description field for instructors to document notes regarding the student, or their class attendance.

3.6. Events

3.6.1. Lesson

3.6.1.1. Add Lesson Field List

- Lesson Type (Term Reference)
  Dropdown menu that displays the current lesson types in the system that can be scheduled
- Instructor (User)
  Dropdown menu that displays the current instructors that are available to teach the type of lesson selected
- Duration (integer)
  Dropdown menu that displays the duration of the lesson in 15 minute increments. This field will initially be populated with the default duration for the selected lesson type
- Date and Time (date and time)
  Date and Time will be selected by utilizing a calendar that will display the times the instructor is available to teach. When a day is selected, times within the teacher's set availability schedule are displayed in 15 minute increments to choose from.
- Standing lesson
  - Expiration Date (date)
    Determines when then standing lesson will stop repeating.
  - Repetition Interval (integer)
    The repetition of a lesson is defined by how often the lesson repeats itself in weeks. (ex. 2 = every 2 weeks)
  - Base Lesson (Lesson Reference)
    This field contains a reference to the original standing lesson. This is used to determine which lessons are a part of the standing lesson after they have been created. This allows for all lessons associated with a standing lesson to be modified or deleted with a single operation.
- Personal Information
  - Student (Attendance reference - IEF)
    Allows staff to enter attendance records for students. Allows specifying a distinct enrollment per student account, as well as adding descriptions, handling couple attendance, and viewing student contact info.

3.6.2. Group Lesson

3.6.2.1. Add Lesson Field List

- Lesson Type (Term Reference)

Dropdown menu that displays the current lesson types in the system that can be scheduled

- Instructor (User)
  Dropdown menu that displays the current instructors that are available to teach the type of lesson selected
- Students (Attendance reference - IEF)
  Allows staff to enter attendance records for students. Allows specifying a distinct enrollment per student account, as well as adding descriptions, handling couple attendance, and viewing student contact info.
- Duration (integer)
  Dropdown menu that displays the duration of the lesson in 15 minute increments. This field will initially be populated with the default duration for the selected lesson type
- Date and Time (date and time)
  Date and Time will be selected by utilizing a calendar that will display the times the instructor is available to teach. When a day is selected, times within the teacher's set availability schedule are displayed in 15 minute increments to choose from.
- Standing lesson
  - Expiration Date (date)
    Determines when then standing lesson will stop repeating.
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    The repetition of a lesson is defined by how often the lesson repeats itself in weeks. (ex. 2 = every 2 weeks)
  - Base Lesson (Lesson Reference)
    This field contains a reference to the original standing lesson. This is used to determine which lessons are a part of the standing lesson after they have been created. This allows for all lessons associated with a standing lesson to be modified or deleted with a single operation.
- Personal Information
  - Student (Attendance reference - IEF)
    Allows staff to enter attendance records for students. Allows specifying a distinct enrollment per student account, as well as adding descriptions, handling couple attendance, and viewing student contact info.

3.6.3. Services

Services are displayed and booked on the day view, similar to lessons. Service types are listed in Appendix I. Services are tied to students but they do not count as lessons used, booked, etc. Students don't see these lessons.

3.6.3.1. Add Services Field List

- Service Type (Term reference)
  Dropdown menu that displays the current Service Types available
- Instructor (User)
  Instructor for the service
- Executive (User)
  Executive involved in the service
- Duration (Integer)
  Expected duration of the service
- Date and Time (date and time)
  Date and time of service
- Student (Attendance reference - IEF)
  Name of the Student receiving the service
- Notes (text area)
  Additional notes about service provided

4. Imports

CSV Importers will be created for all of entity types listed below. The Feeds and Feeds Tamper modules will be used for processing CSV data into Drupal entities. Minor Preprocessing will be performed on fields to assist in data imports.

4.1. Date Fields

Dates will automatically be converted to PHP timestamps using the site's timezone. Dates are assumed to be in a US date format unless specified otherwise.

4.2. Term Mapping

The legacy system's data contains many terms and categories that will not be carried over to the new system. Functionality will be developed to combine those terms and to assist in consolidating terms unto a more standardized format during the import. The mapping of legacy terms to new terms is further defined in Appendix I.

4.3. Student Names

The legacy system had no standardized method for student names. To compensate for this, functionality will be developed to parse student names into a recognizable set of values based off of the patterns listed below. Names not matching these patterns will not be interpreted correctly. A best effort will be made to interpret and import students that follow these naming schemes, but 100% accuracy cannot be guaranteed.

- [Last name], [First name]
- [Last name], [First name] & [First name]
- [Last name], [First name], [First name]

- [Last name], [First name], [First name] [Last name]
- [Last name], [First name] & [Last name], [First name]
- [Last name], [First name] and [Last name], [First name]

4.4. Attendance Enrollments

At this time, there is no available information that can accurately map student attendance records to enrollments. To compensate for this enrollments will be assumed based off the student, the students' purchased enrollments, and the lesson type for the imported record.

4.5. Import Procedure

At this time, there will be a defined import procedure. The importers will be developed in such a way as to allow improving the import procedure and creating a more streamlined user experience. Documentation on the correct import procedure will be provided.

4.6. Entity Types

Only entity types listed here will have entity types created for them. Some imported records may require additional steps to be imported properly. Any additional steps will be outlined in the import procedure.

4.6.1. Packages

4.6.2. Staff

All staff members will be imported as an Instructor and should be manually changed by the user.

4.6.2.1. Instructor

4.6.3. Students

4.6.3.1. Student Accounts

4.6.3.2. Students

4.6.4. Enrollments

4.6.5. Payments

4.6.6. Square Data

4.6.7. Events

4.6.7.1. Lessons

4.6.7.2. Group Lessons

4.6.7.3. Services

4.6.8. Attendances

5. Taxonomy Term Types

5.1. Teacher Category

Teacher category terms are used to help manage and filter which instructors are being viewed at a given time on the day view. Site Admins have the option of moving teachers between categories, as well as creating as many categories as needed.

5.2. Student Department

Students are automatically categorized into departments based on the departments associated with their active enrollments. It is possible for a user to be part of multiple departments if they have multiple active enrollments corresponding to multiple departments.

5.2.1. Front Dept

5.2.1.1. Students who are on a Gift, Pre-Original, or Original Enrollment.

5.2.2. Middle Dept

5.2.2.1. Students who are on an Extension Enrollment.

5.2.3. Back Dept

5.2.3.1. Students who are a Renewal Enrollment.

5.3. Enrollment Type

The enrollment type is used to categorize students and the lessons they are taking by type. Generally, different types of lessons are associated with specific enrollment categories. Separate enrollments allow for different lesson pricing and tuition.

5.3.1. Student Department Reference

This field references the student department associated with this enrollment type. Students having an enrollment with this term will also be considered a part of the referenced student department.

5.4. Lesson Type (Appointment Type)

5.4.1. Lesson Type Fields

5.4.1.1. Color

A color field that is used to make various lesson types apparent at a glance to users. Lesson type colors can be changed at any time by site administrators.

5.5. Payment Type

Used to categorize and define payment records. Allows for defining payments as imported from square, cash payment, or other types of payments.

5.6. SPS Code (Originally Sale Code)

The SPS code will be used to connect data for the AMI Reports. Current AMI documentation state there are 7 unique codes to choose from.

6. Calendar

6.1. Lessons Day View

The Lesson Day view will display all lessons and services occurring on the selected day for all teachers

6.1.1. Filtering

- Teacher Category

  This allows the instructors for the day view to be filtered based on their assigned category (such as Primary or Secondary)

- Date

  The day view will be filtered by the date

- Lesson/Service

  This filter will give the user the option to see only Lessons or services

6.1.2. TableView

- Teacher Names

  Hovering over a teachers' name pulls up a pop-up box that displays the following information:
  - Number of lessons for this Teacher today
  - Number of lessons for today by Type for this Teacher

- Event Blocks

  Event Blocks are detailed further in section 6.3

6.2. Weekly View

The weekly view displays all lessons occurring during the selected week for the selected teacher.

6.2.1. Filtering

All filters in the Week view are required in order to pull up results

- Week

  Users will be able to page through weeks using navigation buttons. The default week is the current week.

- Teacher

  The teacher that should be used to provide results for this view. Defaults to the top priority teacher from the priority queue.

6.2.2. Table View

- Days of the Week
- Event Blocks
  Event Blocks are detailed further in section 6.3

6.3. Lesson Blocks

6.3.1. Color Coding

Lessons are color coded for display on the day view. There are two criteria that determine the color of the Lesson block. Color coding specifics are further outlined in section (6.12)

- Status
- Event Type

6.3.2. Information

- Lesson Type
  Display the type of Lesson in its abbreviated form.
- Student Last Name
- Description
  Show a shortened description for the task. Icons can be displayed here as well.
- Paid Lessons Count
  Display the number of unused lessons currently paid for. If the student has reached their low lesson threshold the text should display as red
- Date of Next Lesson
  Display the date of the next lesson for the student, formatted as MM/DD. If no future lesson (appointment) is booked, display NFA.
- Hovering over a Lesson block displays the following information in a tooltip:
- Student Full Name
- Lesson Description
- Upcoming Appointments

6.3.2.1. Clicking on lesson block will display additional information about the Lesson and the students attending the lesson as well as provide an interface for staff to modify the lesson. (See section 6.6)

6.3.2.2. Display of “lesson Info Popup Window”

The Appointment Info Popup Window is displayed when you click on an event block on the day view.

- Lesson Info
  The lesson info section displays information about the lesson selected
    - ID
    - Instructor
    - App-Type
    - Date
    - Start Time
    - End Time
    - Number of Students for this Lesson

6.4. Service Blocks

6.4.1. Color Coding

Services are color coded for display on the day view. Services will be colored by Status. The color of the Color coding specifics are further outlined in section (6.12).

6.4.2. Information

- Service Type
- Instructor
- Executive
- Notes
- Student

6.5. Event "Edit" Details

6.5.1. Lesson Info

- ID
- Instructor
- App-Type
- Date
- Start Time
- End Time
- Number of Students for this Lesson

6.5.2. Students List for this Lesson

The students list for this lesson section displays information about all students registered for the lesson

- Student Name
- Email
- Phone
- Description
- Enrollment Type

- Status
  The status column contains a dropdown menu that contains the potential statuses a lesson can have. After a lesson has occurred the students' status will be manually changed and the color of the lesson block will change based on the status selected.

6.6. Lessons Available

This logic will integrate with the lesson creation forms and logic to inform the staff member that the user is out of paid lessons. When selecting an enrollment for students, an indicator will be made next to enrollments that do not have any remaining paid lessons.

6.6.1. Low Lesson Threshold

Add a field to users that is used to determine when a user is nearly out of lessons. This is due to the vast scale variance in student lesson frequency. (some users are 10 lessons a week, others are 5 a month).

6.6.1.1. Lesson Creation

When creating a lesson, the number of paid lessons available on an enrollment should be checked.

6.6.1.1.1. Low Lessons

If the paid lesson count has crossed the threshold set on the selected enrollment, a warning should be shown to the user. This does not prevent the lesson from being booked.

6.6.1.1.2. No Lessons Available

If the paid lesson on the selected enrollment is equal to zero, a warning should be shown to the user. This does not prevent the lesson from being booked.

6.6.1.2. Lesson Blocks

If the paid lesson count has crossed the threshold set on the enrollment of a lesson, the lesson block should display the Paid Lessons value in bold red to highlight this status.

6.6.1.3. Notifications

When an enrollment passes the paid lesson threshold, an email should be sent to staff members so that payment or discussions with the student can arranged. This is sent to all staff members.

6.7. Standing Lessons

Standing lessons are lessons that repeat at a regular interval until a specified end date. When a standing lesson is created, individual instances of that lesson are scheduled to be created for each occurence of the standing lesson for the following 12 weeks. Functionality will be developed to allow deleting all future instances of a standing lesson, as well as making minor modifications to all future lessons. As each instance of a standing lesson occurs, the 12 week buffer will be extended with new lessons being created as needed.

6.7.1. Modify All Future Lessons

When modifying a standing lesson, users will be given an alternate display that will allow them to make minor changes to all future lessons. Making changes within this form display will prompt users to confirm that they are making changes to all future lessons, and will then trigger a delayed process to update all future lessons.

6.7.2. Conflicting Schedule Report

When a new standing lesson is created, a report will be generated showing all lessons that conflict with that standing lesson within a 12 week period. The report will be printable to provide reference to staff as they resolve any conflicts necessary.

6.8. Lesson Session Suggested Start Time

6.8.1. Display of "Session Start Times"

Session start times can be set individually for each day of the week. The 15 minute increments for session start times will be displayed with a grey background

- Table View
  - Week Day
  - Session Start Time
    Text field where you can input multiple times

6.9. Instructor Availability

6.9.1. Scheduling

Instructors will have an availability field that will be integrated with the lesson scheduling system to indicate each instructor's individual availability for each day by providing a background color on the times outside of their availability. No validation will be developed to prevent a teacher from being scheduled outside of their availability ranges.

6.9.2. Lesson Compatibility

Instructors will have a lesson compatibility field allowing studio directors to set which types of lessons that instructor is able to teach. When creating lessons, only lessons with a matching compatibility will be displayed as options.

6.10. Teacher Priority Queue

A draggable list of instructors will be created to allow studio directors to determine the order in which instructors are displayed on the day view. No paging or other functionality will be developed to ensure instructors from different sections are ordered in accordance with their status.

6.11. Lesson Coloring

Lessons displayed on any of the scheduling dashboards are displayed as colored blocks, providing at a glance information about the lesson. Lessons in the future are colored based off of their lesson type. Lessons in the past are colored by their assigned status value.

6.11.1. Color by Lesson Type

Back Dept Lesson (BD)	Navy (#001f3f)
Coach Lesson (C)	Lime (#01FF70)
Group Lesson	Olive (#3D9970)
Buddy Lesson	Orange (#FF851B)
Master Class	Light Blue (#add8e6)
Practice Party	Olive (#3D9970)
Front Dept Lesson	Pink (#E8A8B8)
Dance Evaluation	Teal (#39CCCC)
Comp Lesson	Yellow (#FFDC00)
Wedding Lesson	Purple (#B10DC9)
Middle Department Lesson	Lavender (#E6E6FA)

6.11.2. Color by Lesson Status

Pending Status	Red (#FF4136)
Showed	Orange (#FF851B)
No Showed, Charged	Gray (#AAAAAA)
No Showed Not Charged	Gray (#AAAAAA)
Rescheduled	Gray (#AAAAAA)
Canceled	Gray (#AAAAAA)

6.11.3. Color by Non SPS Service Type

Service Chat	Purple (#B10DC9)
Graduation	Gold (#F9A602)
Dance Show	Olive (#3D9970)
Regularly Schedule Out	Maroon (#85144b)
Out by Time Off Request	Banana (#FCF4A3)
Meal Break	Maroon (#85144b)
Meeting	Maroon (#85144b)
Dance Session	Maroon (#85144b)
Misc Chat	Blue (#0074D9)
Calls	Maroon (#85144b)
Break	Maroon (#85144b)
Read Me	Maroon (#85144b)
Training Class	Maroon (#85144b)
Schedule	Lime (#01FF70)
Desk	Maroon (#85144b)
One to One	Maroon (#85144b)
Out Sick	Maroon (#85144b)
Tuition	Fuchsia (#F012BE)
Assist Lesson	Maroon (#85144b)
Coaching Lesson	Lime (#01FF70)
Lesson Package Chat	Aqua (#7FDBFF)
Internal Use	Maroon (#85144b)
Dream Sheet	Blue (#0074D9)
Outside Event	Maroon (#85144b)
Service Visit	Blue (#0074D9)
Dance O Rama Chat	Flamingo (#FCA3B7)
Progress Check	Light Purple (#d5a6e6)
Benefit Sheet	Blue (#0074D9)
Grad Chat	Lavender (#E6E6FA)
Showcase Chat	Flamingo (#FCA3B7)

6.11.4. Color by SPS Service Type

Original Chat	Aqua (#7FDBFF)
Extension Chat	Banana (#FCF4A3)
Renewal Chat	Olive (#3D9970)

6.11.5. Color by Service Status

Sale	Green (#2ECC40)
No Sale	Red (#FF4136)
“Think it Over”	Orange (#FF851B)
Showed	Tea (#SOC878)
No Showed	Gray (#AAAAAA)
Cancelled	Gray (#AAAAAA)
Rescheduled	Gray (#AAAAAA)
Complete	Tea (#SOC878)
Incomplete	Yellow (#FFDC00)
Pending Status	Gray (#AAAAAA)

7. Reporting

7.1. General Reporting

7.1.1. Students Report

Students can be categorized as Active, Inactive, and NFA (No Future Appointments). Each student type will have its own report, allowing administrators to view each type of student as its own report. Below are the three statuses and the criteria for each category.

- Active

  This status is attributed to students who have a lesson scheduled within the next 30 days. The date column for the active students table will display the date of the students’ next upcoming lesson
- Inactive

  This status is attributed to students who have not had a lesson in the last 60 days and do not have any future lessons scheduled for the following 30 days.

The date column for the Inactive students table will display the date of the students' previous lesson

- NFA

  This status is attributed to students who may have had a lesson in the last 60 days, but do not have a future lesson scheduled for the following 30 day. The date column for the NFA students table will display the date of the students' last lesson

7.1.2. Filtering and Field List

All three students reports will contain the same fields and filterings

7.1.2.1. Filtering

- Name
- Email
- Teacher
- Student Department
- Date

7.1.2.2. Table View

- Name
- Email
- Student Department
- Teacher of last lesson
- Date of last lesson
- Edit/View

  All student table views will display a link that when clicked will lead to the Students' Personal Page

7.1.3. Student Inquiry Report

The Inquiry List will display the information of all student inquiries. When a student is marked as a student they will be hidden from this list

7.1.3.1. Filtering

- First Name
- Last Name
- Inquiry Date
- Inquiry Taker
- Teacher
- Email

7.1.3.2. Table View

- First Name
- Last Name
- Inquired On
- Booked On

- Showed On
- Enrolled
- Inquiry Taker
- Teacher
- Email
- Phone Number
- Inquiry Method
- Notes

7.1.4. Students' Enrollment Report

The Students' enrollment List is a table that contains the details of all the enrollments a student has purchased. This table is displayed on the students' personal data page.

7.1.4.1. Filtering

- Instructor
- Category
- Total Price
- Total Paid

7.1.4.2. Table View

- Instructor
- Document ID
- Sale Date
- Category
- Package Name
- Total Price
- Total Paid
- Lessons Available

7.1.5. Students' Event Report

The Event list displays past and future lessons and services for the student selected. This table is displayed on the students' personal data page.

7.1.5.1. Filtering

- Date
- Service
- Teacher

7.1.5.2. Table View

- Date
- Time
- Service
- Length
- Teacher
- Status

The cells in the status column will be colored differently based on the status of the lesson similarly to the colors of the lesson blocks.

- Posted

7.1.6. Packages Report

The packages list is a table that displays all the packages available on the site.

7.1.6.1. Filtering

- Name
- SPS Code
- Lesson Type
- Lesson Price
- Lesson Count
- Total Price

7.1.6.2. Table View

- Name
- Abbreviation
- SPS Code
- Lesson Type
- Lesson Price
- Lesson Count
- Total Price
- Edit
  Each cell in the 'edit' column will contain a button that links to the package creation page where you can edit the details of the package
- View
  Each cell in the 'view' column will contain a button that links to the package view

7.1.7. Enrollments Report

The Enrollment List is a table that displays the information for all enrollments purchased.

7.1.7.1. Filtering

- Student Name
- Instructor
- Sale Date
- Category
- Package Name
- Lesson Paid

7.1.7.2. Table View

- ID
- Student Name
- Instructor

- Created
- Document ID
- Sale Date
- Category
- Package Name
- Lesson Price
- Total Lessons
- Total Price
- Lesson Used
- Total Paid
- Lessons Paid
- Lesson Available
- Edit
  Each cell in the 'edit' column will contain a button that links to the enrollment creation page where you can edit the details of the enrollment
- View
  Each cell in the View column will contain a link to a page displaying the enrollment's details
- Remove
  Each cell in the 'remove' column will contain a button

7.1.8. Event Report

The Lessons List displays a list of all past, present, and future lessons.

7.1.8.1. Filtering

- Instructor
- Lesson Department
- Event Type
  - Single Lesson
  - Single Lesson Standing
  - Group Lesson
  - Group Lesson Standing
  - Service
- Start Date
- End Date
- Start Time
- Created
- Student Name
- Instructor

7.1.8.2. Table View

- Lesson ID
- Enrollment ID
- Instructor ID

- Event Type
- Student Name
- Student Email
- Date
- Start Date
- End Date
- Start Time
- End Time
- Duration
- Created
- Service Code (Lesson Type - Abbreviated)
- Repetition (Appt Repeats every X weeks)
- Service ID (Lesson Type - ID)
- Standing (Boolean)
- Type (Enrollment Category)
- Edit
  Every row in the edit column contains a button that links to the lesson creation form where you can modify the details of the lesson
- Remove
  Every row in the remove column contains a button labeled 'delete'. Clicking this button pulls up a pop up window confirming that you would like to delete the lesson.

7.1.9. Payments Report

7.1.9.1. Filtering

- Payment ID
- Customer Name
- Date and Time (Range)
- Student
- Status

7.1.9.2. Table View

- Payment ID
- Customer Name
- Date and Time
- Gross Tuition
- Student
- Enrollment
- Payment Type
- Status
- "Assign" button (Details in 9.2)

7.1.10. Chat Success Rate

The Chat Success Rate report allows Studio Directors and Studio Managers to look up and compare the success rate of the staff in their department against each other and over time. The user will be able to select a service type as well as a date range to pull results that match those criteria. Results will be grouped in sections for each of the success rate types that are being tracked.

7.1.10.1. By Executive

The chat success rate for each executive will be calculated to show the percentage of chats that resulted in a sale. It will be calculated by dividing the number of chats where the user is listed as an executive that resulted in a sale by the total number of chats the user is listed as the executive on.

7.1.10.2. By Junior Executive

The chat success rate for each junior executive will be calculated to show the percentage of chats that resulted in a sale. It will be calculated by dividing the number of chats where the user is listed as a junior executive that resulted in a sale by the total number of chats the user is listed as the junior executive on.

7.1.10.3. By Instructor

The chat success rate for each instructor will be calculated to show the percentage of chats that resulted in a sale where that instructor was listed as the instructor.

7.1.11. Studio Reports

7.1.11.1. Projections

The projections report is used to keep track of payments scheduled to be received during the week.

- Day
  - Day the payment is expected to be received on. If no date is specified the report will display this as ‘Misc.’
- Student
  - Student the payment is being received from
- Enrollment
  - Enrollment the payment is being applied to
- Amount
  - Amount of the expected payment
- Paid
  - Has the amount been paid.

7.2. AMI Reporting

7.2.1. API Integration

Integrates with an API provided by Arthur Murray International to export report results to AMI by week via a Backend data push. The data sent through this feature will be used to generate the reports outlined in the AMI Reports Section.

7.2.2. AMI Reports

7.2.2.1. AMI Reports Royalty

Details on the exact contents of this report and how it will be synced with AMI is outlined further in Appendix III.

7.2.2.1.1. Filtering

- Date Paid
- Student Name
- Sale Package
- Year
- Week

7.2.2.1.2. Table View

- Receipt Number
- Date Paid
- Student Name
- Executive Staff Members
- Sale Code
- Sale Package
- Lesson Count
- Lesson Price
- Total Price
- Cash
- Misc Services
- Total Subject to R/S Fees
- Sundry
- Total Receipts

7.2.2.2. AMI Reports Staff Performance

Details on the exact contents of this report and how it will be synced with AMI is outlined further in Appendix III.

7.2.2.2.1. Filtering

- Staff Member
- Year
- Week

7.2.2.2.2. Table View

- Staff Member AMI Id
- Staff Type
- Number of Guests
- Number in Class
- Private Lessons
- Interview Dept.
- Renewal Dept.
- DOR/Sanct. Competition
- Showcase Medal Ball
- Party Time Non-Unit

7.2.2.3. AMI Reports Studio Business Summary

Details on the exact contents of this report and how it will be synced with AMI is outlined further in Appendix III.

7.2.2.3.1. Filtering

- Year
- Week

7.2.2.3.2. Report View

- Type
- Prepared By
- Week Number
- Week Year
- Cash
- Miscellaneous
- Refund Cash
- Refund Miscellaneous
- Contact
- Booked
- Showed
- Lessons Interviewed
- Lessons Renewed
- Number in Class
- Active Students Interview
- Active Students Renewal
- Pre Original Tried
- Pre Original Sold
- Pre Original Units
- Pre Original Sales
- Original Tried
- Original Sold
- Original Units
- Original Sales
- Extension Tried

    - Extension Sold
    - Extension Units
    - Extension Sales
    - Renewal Tried
    - Renewal Sold
    - Renewal Units
    - Renewal Sales
    - Non Unit Private Lessons
    - Non Unit Private Sales
    - Non Unit Class Lessons
    - Non Unit Class Sales
    - Miscellaneous Sales

7.2.2.4. AMI Reports Miscellaneous

The miscellaneous report will not be added to the system.

8. Blocks and Pages

8.1. Main Menu

8.1.1. Studio Director/Admin

- Studio Director/Admin Dashboard
- Admin Dashboard
- In the case of studio Directors their admin dashboard access is limited to Easy lessons and users whereas administrators have access to more backend features.
- User Registration
    - Student register
    - Instructor Register
    - Studio Admin
- Lessons
    - Day View
    - Lessons List
    - Add Lessons
    - Session Start Time
- Enrollments
    - Enrollment List
    - Add Enrollment
- Packages
    - Packages List
    - Create Package
- Data Tools
- Reports
- Payments

- Square
- Students Data List
- Students List
    - Active Students
    - Inactive Students
    - NFA Students
- Email Sent
- Messages Sent
- User Lists
- Edit Profile
- Log Out

8.1.2. Instructor

- Instructor Dashboard
- Lessons
    - Day View
    - Lessons List
    - Add Lessons
- Students' Profile
- Students' Reports
- Edit Profile
- Log Out

8.1.3. Studio Manager

- Studio Manager Dashboard
- Lessons
- Edit Profile
- Log Out

8.2. Dashboards

8.2.1. User Profile

Every user's dashboard displays their avatar image at the top of the page, as well as a table displaying their basic information

- First Name
- Last Name
- Username
- Email
- Position
- Registration Date

8.2.2. Studio Director

8.2.2.1. Inquiry Data

- YTD Contacts

Inquired dates on student account before or equal to today this year.

- Prev. YTD Contacts
  Inquired dates on student account before or equal to this date last year.
- YTD Booked
  Booked dates on student account before or equal to today this year.
- Prev. YTD Booked
  Booked dates on student account before or equal to this date last year.
- YTD Showed
  Showed dates on student account before or equal to today this year.
- Prev. YTD Showed
  Showed dates on student account before or equal to this date last year.

8.2.2.2. Payment Data

Payment data shows total payments received by month as a bar chart for the current and previous years.

8.2.2.3. Enrollments Sold

Enrollments sold data displays the dollar amount of enrollments sold by month for the current and previous years.

8.2.2.4. Lessons Booked

Lessons booked data chart displays the number of lessons booked by month for the current and previous years.

9. Custom Functionality

9.1. Archive Staff

Staff users can be archived by deactivating the staff user. Deactivated users will not display in suggested results for autocomplete fields on any entity type. Deactivated users can be reactivated at any time, and are still fully qualified users on the system. The only differentiating factor is that they do not display in complete lists for instructors.

9.2. Payment Assignment

On the payments view, a payment assignment button will be displayed allowing studio directors to assign the payment to a specific user and enrollment. Clicking the “Assign” button will open a modal to prompt users to assign the value. No effort will be made at this time to automatically assign payments to users and their enrollments.

9.3. Selective Field options

A dynamic system will be developed to allow fields with a custom autocomplete assignment to return results based on other values previously entered.

9.3.1. Instructor

When creating a lesson potential Instructors are filtered based off the lesson type selected. An instructor can then be selected from the filtered list.

9.3.2. Timeslots

When booking an appointment, the times available will be updated to prevent the teacher from being double booked. Only times that conflict with other appointments will be restricted. All other times, including times outside of the teachers standard availability schedule, will be displayed.

9.3.3. Enrollment

When creating a lesson after a student is selected, the list of enrollment types will be filtered down based off enrollments the student has available to them

9.4. Email & SMS Notifications

Reminder notifications will automatically be sent to all students with scheduled lessons at 7 AM on the day prior to their lesson. Students will have the option to choose Email, SMS message, or both notifications.

Appendix I - Imports

1. Import Mapping

1.1. Packages

Field	I Dance
Lesson Type	
Abbreviation	code
Name	name
SPS Code	salecode
Lesson Price	
Lesson Count	
Total Price	salevalue
Additional Notes	comments

1.2. Staff

Field	I Dance
First Name	first_name
Last Name	last_name
Email	email
AMI-ID	
Legacy ID	tcode
Executive	
Teacher Category	
Availability	

1.3. Student Account

Field	I Dance
First Name	sname
Last Name	sname
Address	address1, address2, city, state, zip code
Home Phone	hphone
Cell Phone	cphone
Gender	sex
Inquiry/Student	
Inquiry Method	inqmethod

Inquiry Taker	inqtaker
Inquired	inqdate
Booked on	inqbooked
Showed	inqshowed
Notes	notes
Legacy ID	scode
Teacher	tcode1
Student Records	
Low Lesson Threshold	

1.4. Enrollments

Field	I Dance
Student	scode
Doc ID/Legacy ID	docid
Sale Date	saledate
Category	
Package Name	packcode
Lesson Price	
Lesson Count	pri1
Total Price	salevalue
Executive	closer
Junior Executive	
Instructor	
Payment Interval	
Interval Unit	

1.5. Payment

Field	I Dance
Payment ID	docid
Customer Name	
Date and Time	datepaid
Gross Tuition	amountpaid
Student Name	scode
Enrollment Name	enrollid
Payment Type	cardtype

Status	

1.6. Lessons

Lesson Type	service
Instructor	tcode
Duration	duration
Date and Time	date / time
Standing Lesson	standing no
Expiration Date	
Repetition Frequency	frequency
Repetition Units	
Student	scode

1.7. Group Lessons

Lesson Type	service
Instructor	tcode
Students	scode
Duration	duration
Date and Time	date / time

1.8. Services

Service Type	service
Instructor	tcode
Executive	
Junior Executive	
Duration	duration
Date and Time	date / time
Student	scode
Notes	lesson

1.9. Attendance

Student Account	sname
Status	apptstatus

2. Conversions

2.1. Package Sale Codes

idance salecode (SPS)	Convert SPS Code To:	AMI Official SPS Codes

PO	PORI	PORI
RI	PORI	ORI
GIFT	PORI	EXT
ORI1	ORI	REN
EXT	EXT	MISC
REN1	REN	SUN
TRAN-OUT	REN	GROUPON
RECEIVE	PORI	
SHOWCASE	MISC_07	
SPONSOR	MISC_14	
OUTSIDE	MISC_14	
BONUS	PORI	
CD	MISC_14	
CLASS	MISC_14	
CORE	MISC_14	
DOR/SANCT.	MISC_14	
EXT1	EXT	
ORI	ORI	
PARTYTIME	MISC_14	
PORI1	PORI	
PRIVATE	EXT	
PTR		
REN	REN	
REXT	EXT	
SHOE	SUNDRY	
TRAN-IN	REN	
tte	REN	
OLDSUN	SUNDRY	
sun	SUNDRY	
G	REN	
IVE	REN	

2.2. Students

2.2.1. Idance Inquiry Methods (Inqmethods)

idance inquiry methods	Convert Inquiry To:	Discussed Inquiry Methods
W	Walk-in	Internet
IN	Internet	Phone
EMA	Other	Walk-in
TEL	Phone	Other
RL	Other	Guest
NON	Other	
GST	Guest	
EXC	Other	
WEDNGHTMRKT	Other	
Woofu	Internet	
GIF	Other	
WCB	Other	
ALOCAL	Other	
Chamber	Other	
AUCTION	Other	
8	Other	
12	Other	
1	Other	
5	Other	
14	Other	
15	Other	
EVENT	Other	
s	Other	
7	Other	
2	Other	
13	Other	
6	Other	
HOW	Other	
3	Other	
0	Other	
Woof	Internet	
u	Internet	

2.3. Lesson Types

Lessons		
idance	**New Name**	**Type**
BPRI	Back Dept Lesson (BD)	Lesson (sps)
COACH	Coach Lesson (C)	Non Unit
GRP	Group	Group Classes (sps)
BDYLSN	Buddy Lesson	Lesson (sps)
MCLS	Master Class	Non Unit
Party Sess	Practice Party	Party (sps)
FPRI	Front Dept Lesson	Lesson (sps)
DEF	Dance Evaluation	Lesson (sps)
ST-CMP	Comp Lesson	Check with AMI
Party Session	Practice Party	Party (sps)
WED0	Wedding Lesson	Lesson (sps)
WED4	Wedding Lesson	Lesson (sps)

2.4. Services

2.4.1. Non sps

Internal (non sps)	
Old Names	**New Names**
service	Service Chat
GRAD	Graduation
CP	Dance Show
OUT	Regularly Schedule Out
OUT RQ	Out by Time off Request
DNR	Meal Break
MTG	Meeting
DS	Dance Session
MISC	Misc Chat
CALL	Calls
brk	Break
README	Read Me
TC	Training Class
Exec	Meeting

0	
SCHD	Schedule
GST	
DESK	Desk
ADM MTG	Meeting
121	One to One
SICK	Out Sick
Tuition	Tuition
ASSTCL	Assist Lesson
Hold	
BUDDYCHT	Service Chat
PROCOCH	Coaching Lesson
LSNPKG	Lesson Package Chat
TTEA	Internal Use
CCAUTH	Internal Use
DREAM	Dream Sheet
SPNSR	Internal Use
NEWCOMER	Internal Use
desk	Desk
Event Out	Outside Event
C/BOOK	Calls
Drive	Service Visit
CHAT	Misc Chat
LOCK UP	
ASPRI	Assist Lesson
DOR	Dance O Rama Chat
PRG	Progress Check
BENST	Benefit Sheet
Tuition No	
AWAY	Out by Time Off Request
CG	
Practice	Dance Session
HERE	Internal Use
SHOW	Misc Cat
GRPN	Misc Chat
HLDOVR	Internal Use
INT	Meeting

MBCHT	Misc Chat
Clean Up	Internal Use
Over Time	Internal Use
In	Internal Use
fpri	Internal Use
HOL	Internal Use
bp	Internal Use
DST	Internal Use
SCHSTD	Internal Use
GRDCHT	Grad Chat
choreo	Internal Use
TIMECARD	Internal Use
SHWCSE	Showcase Chat

2.4.2. Sps

Service (sps)	
Old Names	**New Names**
ORI	Original Chat
EXT	Extension Chat
ORI (R)	Original Chat
ren	Renewal Chat
REN	Renewal Chat
REN (R)	Renewal Chat

Appendix II - Taxonomy Term Default Values

1. Enrollment Type

1.1. Pre-Original
1.2. Original
1.3. Extension
1.4. Renewals
1.5. Miscellaneous
1.6. Non-Unit
1.7. Sundry
1.8. Transfer In
1.9. Comp Lesson
1.10. Uncategorized

2. Lesson Type (Appointment Type)

2.1. Back Dept Lesson (BS)
2.2. Coach Lesson (C)
2.3. Group
2.4. Buddy Lesson
2.5. Master Class
2.6. Practice Party
2.7. Front Dept Lesson
2.8. Middle Dept Lesson
2.9. Dance Evaluation
2.10. Comp Lesson
2.11. Practice Party
2.12. Wedding Lesson

3. Service Types

3.1. Non SPS

3.1.1. Service Chat
3.1.2. Graduation
3.1.3. Dance Show
3.1.4. Regularly Schedule Out
3.1.5. Out by Time Off Request
3.1.6. Meal Break
3.1.7. Meeting
3.1.8. Dance Session
3.1.9. Misc Chat
3.1.10. Calls
3.1.11. Break

3.1.12. Read Me
3.1.13. Training Class
3.1.14. Schedule
3.1.15. Desk
3.1.16. One to One
3.1.17. Out Sick
3.1.18. Tuition
3.1.19. Assist Lesson
3.1.20. Coaching Lesson
3.1.21. Lesson Package Chat
3.1.22. Internal Use
3.1.23. Dream Sheet
3.1.24. Outside Event
3.1.25. Service Visit
3.1.26. Dance O Rama Chat
3.1.27. Progress Check
3.1.28. Benefit Sheet
3.1.29. Grad Chat
3.1.30. Showcase Chat

3.2. SPS

3.2.1. Original Chat
3.2.2. Extension Chat
3.2.3. Renewal Chat

4. SPS Code (Originally Sale Code)

The SPS code will be used to connect data for the AMI Reports. Current AMI documentation state there are 7 unique codes to choose from. Additional codes can be implemented at a later date. The initial codes are:

4.1. PORI
4.2. ORI
4.3. EXT
4.4. REN
4.5. MISC
4.6. SUN
4.7. GROUPON

5. Inquiry Method

5.1. Internet
5.2. Phone
5.3. Walk-in
5.4. Other
5.5. Guest

Appendix III - AMI Reporting

1. AMI Reports

1.1. Royalty

Report Field	Type	Details	Calculation in System
Prepared_by	String	The name of the person preparing the report	Display name of the currently logged in user
Week_number	Integer	The week number of the report	Week number of the generated report
Week_year	Integer	The week year of the report	Week year of the generated report
Line_items[] [receipt_number]	String	The Receipt number of a sale	Receipt number for the enrollment sold
Line_items[] [date_paid]	Date	The date the line item was paid	Date the enrollment was paid for
Line_items[] [students_full_name]	String	The full name of the Student	Name of the student who purchased the enrollment
Line_items[] [executive]	String	The AMI ID of the executive	AMI ID of the executive involved in the sale
Line_items[] [staff_members]	Array	An array of all AMI ID's associated with the sale	AMI IDs of all staff members involved in the sale
Line_items[] [sale_code]	Choice	The internal code of the sale Must be one of the approved sale codes	Sale code of the package sold
Line_items[] [package_code]	String	Required if sale_code is MISC or SUN and custom_package is not given The value must be a valid package code type for the given sale_code	Package code of the package sold if the sale code is MISC or SUN
Line_items[] [custom_package]	String	Required if sale_code is MISC or SUN and package_code is not given If possible, you should prefer sending package_code instead	

		of this field	
Line_items[] [number_of_units]	Float	The number of units sold	Total number of lessons in the package sold
Line_items[] [sale_value]	Integer	The total value of the sale	Total value of the package sold
Line_items[] [cash]	Integer	The cash amount received from the sale	Total payment amount received for the package sold
Line_items[] [miscellaneous_services]	Integer	Used instead of cash for MISC classified sales	Total sale value of enrollment if categorized as MISC
Line_items[] [sundry]	Integer	Sundry value of the sale	Total value of sundry items in the sale
Line_items[] [non_taxable]	Boolean	Indicated that this transaction is not subject to country specific taxes	

1.2. Staff Performance

Report Field	**Type**	**Details**	**Calculation in System**
Prepared_by	String	The name of the person preparing the report	Display name of currently logged in user
Week_number	Integer	The week number of the report	Week number of the generated report
Week_year	Integer	The week year of the report	Week year of the generated report
Line _items[] [staff_memeber]	String	The AMI ID of the staff member	Staff member's AMI ID
Line_items[] [staff_type]	Choice	The classification of the staff member	Either INSTRUCTOR or EXECUTIVE
Line_items[] [number_guests]	Float	Number of guests for the instructor for the week	Number of guests attending classes taught by the staff member in the reported week
Line_items[] [private_lessons]	Float	Private lessons for the instructor for the week	Number of single lessons taught by the staff member in the reported week

Line_items[] [number_in_class]	Integer	Number in class for instructor for the week	Number of students attending classes taught by the staff member in the reported week according to the attendance record.
Line_items[] [dor_sanct_competition]	Integer	DOR Sale value for the staff member	Total value of the DOR sales made by the staff member in the reported week after subtracting the dropped value of enrollments also matching that type and week for the teacher.
Line_items[] [showcase_medal_ball]	Integer	Showcase medal ball sale value for the staff member	Total value of the showcase medal ball sales made by the staff member in the reported week after subtracting the dropped value of enrollments also matching that type and week for the teacher.
Line_items[] [party_time_non_unit]	Integer	Party time/Non unit sale value for the staff member	Total value of the party time/non unit sales made by the staff member in the reported week after subtracting the dropped value of enrollments also matching that type and week for the teacher.
Line_items[] [interview_department]	Integer	Interview sale value for the staff member	Total value of the front department sales made by the staff member in the reported week after subtracting the dropped value of enrollments also matching that type and week for the teacher.
Line_items[] [renewal_department]	Integer	Renewal sale value for the staff member	Total value of the back department sales made by the staff member in the reported week after subtracting the dropped value of enrollments also matching that type and week

			for the teacher.

1.3. Studio Business

Report Field	Type	Details	Calculation in System
Prepared_by	String	The name of the person preparing the report	Display name of currently logged in user
Week_number	Integer	The week number of the report	Week number of the generated report
Week_year	Integer	The week year of the report	Week year of the generated report
Cash	Integer	Cash totals for the week	Total cash for the week
Miscellaneous	Integer	Miscellaneous totals for the week	Total amount of payment received for enrollments categorized as miscellaneous for the reported week
Refund_cash	Integer	Cash refund totals for the week	Total refunded payments for the week
Refund_miscellaneous	Integer	Miscellaneous refund totals for the week	Total of all refunds in the misc category
Contact	Integer	Total contacted for the week	Total number of inquiries during the reported week
Booked	Integer	Total booked for the week	Total number of lessons booked for the reported week
Showed	Integer	Total showed for the week	Total number of lessons with a status of 'Showed' that occurred during the reported week
Lessons_interviewed	Float	Total lessons interviewed for the week	Total lessons taken on enrollments categorized as front department during the reported week
Lessons_renewed	Float	Total lessons renewed for the week	Total lessons taken on enrollments categorized as back department during the reported week
Number_in_class	Integer	Number in class for the week	Total number of students who attended lessons during the

			reported week
active_students_interview	integer	Active students interviewed for the week	Front Department active students
Active_students_renewal	Integer	Active students renewed for the week	Back Department active students
Pre_original_tried	Integer	Pre original tried for the week	Total number of pre-original chats that occurred during the reported week
Pre_original_sold	Integer	Pre original sold for the week	Total number of pre-original chats that resulted in a sale during the reported week
Pre_original_units	Integer	Pre original units for the week	Total number of pre-original enrollment lessons sold during the reported week after subtracting the lesson value of dropped enrollments matching that type and week.
Pre_original_sales	Integer	Pre original sales for the week	Total sale value of pre-original enrollments during the reported week after subtracting the dropped value of dropped enrollments matching that type and week.
Original_tried	Integer	Original tried for the week	Total number of original chats that occurred during the reported week
Original_sold	Integer	Original sold for the week	Total number of original chats that resulted in a sale during the reported week
Original_units	Integer	Original units for the week	Total number of original enrollment lessons sold during the reported week after subtracting the lesson value of dropped enrollments matching that type and week.
Original_sales	Integer	Original sales for the week	Total sale value of original enrollments during the reported week after subtracting the

			dropped value of dropped enrollments matching that type and week.
Extension_tried	Integer	Extension tried for the week	Total number of extension chats that occurred during the reported week
Extension_sold	Integer	Extension sold for the week	Total number of extension chats that resulted in a sale during the reported week
Extension_units	Integer	Extension units for the week	Total number of extension enrollment lessons sold during the reported week after subtracting the lesson value of dropped enrollments matching that type and week.
Extension_sales	Integer	Extension sales for the week	Total sale value of extension enrollments during the reported week after subtracting the dropped value of dropped enrollments matching that type and week.
Renewal_tried	Integer	Renewal tried for the week	Total number of renewal chats that occurred during the reported week
Renewal_sold	Integer	Renewal sold for the week	Total number of renewal chats that resulted in a sale during the reported week
Renewal_units	Integer	Renewal units for the week	Total number of renewal enrollment lessons sold during the reported week after subtracting the lesson value of dropped enrollments matching that type and week.
Renewal_sales	Integer	Renewal sales for the week	Total sale value of renewal enrollments during the reported week after subtracting the dropped value of dropped enrollments matching that type and week.

Non_unit_private_lessons	Integer	Non unit private lessons for the week	Total number of Non-Unit Private enrollment lessons sold during the reported week after subtracting the lesson value of dropped enrollments matching that type and week.
Non_unit_private_sales	Integer	Non unit private sales for the week	Total sale value of Non-Unit Private lessons during the reported week after subtracting the lesson value of dropped enrollments matching that type and week.
Non_unit_class_lessons	Integer	Non unit class lessons for the week	Total number of Non-Unit Class enrollment lessons sold during the reported week after subtracting the lesson value of dropped enrollments matching that type and week.
Non_unit_class_sales	Integer	Non unit class sales for the week	Total sale value of non unit class lessons during the reported week after subtracting the dropped value of dropped enrollments matching that type and week.
Miscellaneous_sales	Integer	Miscellaneous sales for the week	Total sale value of enrollments categorized as Miscellaneous during the reported week after subtracting the droppedvalue of dropped enrollments matching that type and week.
Total_taxes	Integer	Total amount of taxes included in sales for the week	

Appendix IV - User Permissions

1. Permissions

	Developer	Studio Director	Studio Manager	Instructor
Dev Tools	✔			
Add Student Record	✔	✔	✔	✔
Edit Student Record	✔	✔	✔	✔
Add Student Account	✔	✔	✔	✔
Edit Student Account	✔	✔	✔	✔
Add Package	✔	✔	✔	✔
Edit Package	✔	✔	✔	✔
Add Enrollment	✔	✔	✔	✔
Edit Enrollment	✔	✔	✔	✔
Add Payment	✔	✔	✔	✔
Edit Payment	✔	✔	✔	
Add Attendance	✔	✔	✔	✔
Edit Attendance	✔	✔	✔	✔
Day View	✔	✔	✔	✔
Events List	✔	✔	✔	✔
Add Event	✔	✔	✔	✔
Edit Event	✔	✔	✔	✔
Imports	✔	✔	✔	
Students Report	✔	✔	✔	
Student Inquiry Report	✔	✔	✔	
Students' Enrollment Report	✔	✔	✔	
Students' Event Report	✔	✔	✔	✔
Packages Report	✔	✔	✔	
Enrollments Report	✔	✔	✔	

Event Report	✔	✔	✔	
Payments Report	✔	✔	✔	
Chat Success Report	✔	✔	✔	
Studio Reports	✔	✔	✔	
AMI Reports Royalty	✔	✔		
AMI Reports Staff Performance	✔	✔		
AMI Reports Studio Business Summary	✔	✔		
Square Data	✔	✔		
Inquiry Data	✔	✔	✔	✔
Payment Data	✔	✔		
Enrollments Sold	✔	✔		
Lessons Booked	✔	✔	✔	✔

Accepted and Agreed

DocuSigned by:
Cara Recine
A9D30C0765C84D2...

Client

7/12/2019

Acceptance Date

DocuSigned by:
Aaron van Zoeren
A03FC53775F548E...

Provider

7/12/2019

Acceptance Date