

Guitar Tutor Commuter Google Automated Booking System

GTC is using a system designed in Google Apps Script that ties together functions from a handful of Google Apps including Calendar, Drive, Sheets, Tasks, Contacts and Gmail, which is initially triggered by the submission of a Google Form. The system handles new students through 'Enrolment Form' submissions and existing students through 'Re-enrolment Form' submissions. Email confirmations and payment reminders are automated and re-enrolment reminders can be triggered through Google Tasks.

1. Enrolment Form

- 1.1 The enrolment form is sent to new students after finalising their enquiry details and coordinating a time for their three lesson Introductory Package with a tutor. Below is a template message.

Here is our student enrolment form to fill out when you get the chance to confirm your first lessons with (tutor). The lessons will be at (time) (date).

<https://www.guitartutorcommuter.com.au/enrolment>

Once you have submitted the form you will receive an email with an invoice to be paid by bank transfer. After payment has been made, the tutor will receive all of your details to begin preparing for the lessons. Please note that the lessons are only confirmed after the payment has been made. Feel free to ask any questions!

- 1.2 When the student completes the enrolment form, all of their details will appear in the 'Enrolment Form (Responses)' spreadsheet (<https://docs.google.com/spreadsheets/d/1JOC7iIVLkLe-fZrP5IgLklf2ALQ1s5kemVOiIDZ24DY/edit#gid=1846861137>) in alphabetical order. This will include the student and parent's name (if applicable), DOB, contact details, address, additional information, make up lesson availability and instruments. Note: additional info and make up lessons availability are not required fields on the form and are often left blank.
- 1.3 The student will also enter the details of their lessons including duration, time, location, day, lesson package, tutor and number of lessons booked.
- 1.4 For these new students it is assumed that they will simply book an introductory package. This means they will need to enter '3' in 'number of lessons booked'. Occasionally there will be students that will select another package or enter more than three as they wish to book more lessons. This isn't a problem and the students will still receive the discount for the first three lessons automatically and then rate of our 'full term packs' thereafter. The lesson fees can be found here: <https://www.guitartutorcommuter.com.au/fees.html>. They will be discussed in more detail in the re-enrolment form section.
- 1.5 guitartutorcommuter@gmail.com will receive a confirmation email once the form has been completed. It will have the subject ('Tutor's Name') – ('Student's Name')(TRIAL). If it says TRIAL it will be distinguished from other 're-enrolment form' submissions discussed later. This confirmation email will have a few details from the submission. It is important to check that these are the same as what has been discussed with the student and tutor.

- 1.6 If a student has only entered their first name then we will need to ask for it and correct it in the spreadsheet.
- 1.7 If the student has changed the lesson time/date then we will need to follow up and re-evaluate the lesson time. This is quite rare. A common mistake is for a student to simply put the wrong date in by mistake. Once the issue has been resolved, we can update the spreadsheet and calendar events manually.
- 1.8 On the form there is an option to enrol multiple students. This will incur an additional student fee. It is important that they have entered the correct number of students that they have discussed with us during the enquiry stage. Students should be told to write (Student 1)/(Student 2)/(Student 3) in 'Student's Name' on the form.
- 1.9 Student's can add guitar hire to their introductory package on the form. They will choose either home delivery or pick up from Artarmon. Reference the fees page for latest prices. Lachlan will need to be notified of any guitar hire. It will be shown in the confirmation email to GTC.

2. Student Confirmation Email

- 2.1 Upon submitting the enrolment form, the student will receive a confirmation email with an invoice attached for the lesson package. It will tell the student the contact and address details they have entered so they become aware of any mistakes.
- 2.2 If the student reports any issue in regards to the contact/address details, these can be fixed manually in the spreadsheet and calendar.
- 2.3 If the student reports any issue in regards to the invoice, please let Lachlan know. It may need to be edited if there is a mistake. The most common is when someone clicks guitar hire by mistake.
- 2.4 If a student responds with the details of a Creative Kids Voucher for payment, please let Lachlan know. We accept CK Vouchers on all items. They are Government Vouchers to the value of \$100. Lachlan needs to process them through Service NSW.
- 2.5 Lessons are not confirmed until payment has been made.

3. Google Calendar

- 3.1 Calendar events will be created upon submission of the enrolment form titled ('Tutor's Name') – ('Student's Name')
- 3.2 All relevant address and student information will appear on the event and the event will repeat on a weekly basis according to how many lessons are booked. In most cases this will be 3 lessons for new students. 'TRIAL' will appear in the event title for the first three lessons of every student.
- 3.3 The tutor will be automatically added to the event and sent an email with an invitation. If the student has selected 'TBC' a tutor will need to be assigned ASAP and then added to the event manually.
- 3.4 It is worth noting that the introductory packages will always be entered as weekly lessons however it will occasionally be discussed in the enquiry stage that the

lessons will occur at different intervals. These lessons will need to be moved manually in the calendar.

3.5 Google calendar has a search function, which makes it easier to find events by searching a tutor or student.

3.6 It is possible to drag events to quickly reschedule them.

4. Google Tasks

4.1 Tasks is basically a 'To Do' list but we have repurposed it to trigger additional automations. Every form submission will create 2 tasks:

4.2 **Invoices (Due) Tasks** will be created 2 days before the first lesson of a booking (or on the booking date if it is within 2 days). It will have the invoice name and the amount due.

4.3 Lachlan will tick these off as payments come through and confirmation emails will be sent to the respective students.

4.4 If it hasn't been ticked off a week after the due date, i.e. payment is overdue, an automated payment reminder email will be sent to the respective student.

4.5 **Re-enrolment Tasks** will appear on the final date of the booking (e.g. on the 3rd lesson of an introductory package).

4.6 We can tick these tasks off after the package has been completed and an automated email will be sent asking the student how lessons are going and if they would like to re-enrol for more lessons. The email will have a link to the Re-enrolment form'.

4.7 There is obviously no need to tick the task off if the student has already gotten in touch to confirm their next booking.

5. Re-enrolment Form

5.1 There are 3 main ways this form is sent to the student:

1. Automated 'Re-enrolment task' email as detailed above.
2. Start of term email sent to all students with a link to the form.
3. Separate request to re-enrol either from someone nearing the end of their package or hoping to re-enrol at a random time. We can use a template for these instances:

We're glad to hear that (student's name) is enjoying their lessons! Here is our re-enrolment form to fill out in order to confirm your next booking.

<https://www.guitartutorcommuter.com.au/re-enrolment>

Please ensure that the student's full name is entered correctly to avoid a system error. You will need to click through 3 pages of the form until you reach the submit button at the end but it shouldn't take more than a minute!

5.2 The re-enrolment form is shorter than the enrolment form as we already have all of the student's details, however, it relies on the student's name matching up exactly with what we have in our system. We can see in the GTC confirmation email if there has been any error as all of the values will be 'undefined'. In the case below, Bridey has entered her nickname instead of the full name 'Bridget

Paige Moorcroft' she previously entered.
(no subject) ➡ Inbox x



guitartutorcommuter@gmail.com
to me ▼

Sun, 23 Jan, 22:04 (15 hours ago) ☆

A form has been submitted for Bridey Moorcroft.

Booking details: undefined (undefined minute) lessons from undefined on undefined undefined.

Location: undefined.

- 5.3 Problems occur when there are multiple students in a lesson and they use the (student 1)/(student 2) format but don't enter it correctly. In those cases it is best to let them know ahead of time.
- 5.4 Another issue is occasionally someone will enter their Chinese name on the first form and then their English name on the next. Obviously these names won't match up in the system.
- 5.5 We can find the information from re-enrolments here:
<https://docs.google.com/spreadsheets/d/1JOC7iVLkLe-fZrP5IgLklf2ALQ1s5kemVOiIDZ24DY/edit#gid=1092302556>
- 5.6 The Re-enrolment form will trigger all of the same automations as the Enrolment form, the main difference being that there are no introductory packages.
- 5.7 We offer different packages based around the school term, which have varying prices due to the amount of admin work involved:

- **Full Term Pack (Weekly)**

This is the cheapest package and usually involves 10 lessons unless the term is shorter/longer. Most popular option, especially for school kids. We will often offer the same price for a 10 week booking made outside of the term.

- **Full Term Pack (Fortnightly)**

This will be 5 lessons on a fortnightly basis.

- **Half Term Pack (Weekly)**

5 lessons. The student will most likely be expecting to book another half term pack halfway through the term.

- **Casual Lessons**

These are the most expensive option but have the most flexibility. They can be rescheduled as many times as possible although the late cancellation policy still applies.

- **School Holiday Lessons**

These are available to under 18 year olds in the school holidays only and have the same flexibility as casual lessons. They are the same price per lesson as the full term packs, however, we may run additional discounts from time to time.

For full fee details:

<https://www.guitartutorcommuter.com.au/fees.html>

- 5.8 Students are required to book the correct number of lessons decided by their package of choice. If they don't they should be asked to resubmit the form. The exception is if they have told us ahead of time that they will be away for certain dates within the term. If this is the case we can direct them to enter a fewer number of lessons. They will need to let us know what dates they are missing so we can rearrange the calendar events accordingly.
- 5.9 We are unable to do refunds however, so if they have already paid then the booking will be subject to our Terms and Conditions whereby funds may be either forfeited or credited to the next term accordingly.

6. Changing details

- 6.1 The re-enrolment form submission will automatically update student contact, address and booking details in the Student enrolment form responses spreadsheet.
- 6.2 Changes to a tutor will need to be updated manually in the spreadsheet (column K) before the student fills out the re-enrolment form.
- 6.3 Changes to the number of students in a lesson will need to be updated in the spreadsheet (column P) before the student fills out the re-enrolment form.
- 6.4 There is no need to change the time or duration of a lesson. This is re-entered each time a student completes the re-enrolment form.

7. Beginning of School Term

- 7.1 We will usually send out an email to all students during the school holidays with a link to the re-enrolment form, encouraging them to fill it out before a specific date. Most people will just fill out the form without any hassles but a few people will need to change times/days, which may result in some coordinating with the tutor.
- 7.2 Some people may respond to email to say they are keen to get started and tell us all the enrolment details. We will still need them to fill out the form. Inevitably everyone will fill out the form.
- 7.3 It is best to keep track of the status of enrolments as they come in from confirmation emails on a spreadsheet of all expected students per tutor. The confirmation emails can be deleted once they have been marked on the spreadsheet.
<https://docs.google.com/spreadsheets/d/1mxJHsDWKFwgveAMOMUUS5oDGT3eSU6sOhYT5zezUss/edit?usp=sharing>
- 7.4 Confirmation emails will be automatically filtered into the folder 'Booking Confirmations'

8. Manual Form Entries

- 8.1 In rare instances it is simply easier to manually complete the re-enrolment form ourselves. It realistically only takes a minute if you have all of the necessary information.
- 8.2 In the case of Bridey Moorcroft, she had filled out all of the information correctly apart from her name. This appeared in the last row of the 'Re-enrolment Responses' tab of the spreadsheet so it took hardly anything to fill this in with the correct name that was copied from the 'Enrolment Responses' tab.