



# CORE LAUNCH CHECKLIST

## Profile Settings

- ☐ Create/Update Reviews (if applicable). Found in: **Settings > General > Profiles**
- ☐ Create/Update Tags (if applicable). Found in: **Settings > General > Tags**

## Notifications

- ☐ Enable/Update Health Profile Notifications. Found in: **Settings > General > Notifications**
- ☐ Enable/Update Subgroup Notifications (if applicable).  
Found in: **Settings > General > Organization > Group Settings > Notifications column**

## Health Profile

Found in: **Settings > Builder**

- ☐ Configure/review subgroup-restricted questions that only appear for specific sessions or programs
- ☐ Reset Expiration dates
- ☐ Confirm questions are nested correctly under questions and headers
- ☐ Check that phone and email fields are set with proper validation format
- ☐ Verify that all links open in a new tab (using markdown) and are up to date (if applicable)
- ☐ Update translations for any new or modified questions (if applicable)
- ☐ Check spelling

## Branding

Found in: **Settings > Branding**

- ☐ Create/update branding text as necessary
- ☐ Add/update logo (if applicable)

## Session Dates

Found in: **Settings > General > Organization > Group Settings**

- ☐ Check that the Start, End, Due, and Lockout Dates make sense (none are in the past or far future)

*Managing a lot of groups? Click Export Groups (top right) for a CSV of all sessions—dates, subgroup contacts, and registration details included.*

# CORE LAUNCH CHECKLIST

If using **Registration**, please address these additional items using the Registration Support Guide.

## Registration Setup

Found in: **Groups > Registration Setup**

**Add-ons:** Additional items or services that can be added to a participant's registration (i.e., t-shirts, after-school care, bus transportation, and store credit).

- ☐ Create add-ons and confirm they are correct (spelling, amount, required, due with deposit, etc.)
- ☐ Deactivate shared add-ons from previous year. Recreate shared add-ons for the current year so they will be available for returning participants. *Tip: Include the year in the label (ex: "T-Shirt - 2027")*

**Coupons:** Discounts or credits offered by your organization and are only applied to tuition fees (i.e. early bird, sibling coupons, scholarships, etc.)

- ☐ Confirm coupons are correct (spelling, amount, etc.)
- ☐ Confirm that any shared coupons from previous year are newly created (unless they are multi-use e.g. "bypassdeposit")
- ☐ Check if coupons should be automatically applied
- ☐ Check coupon expiration dates (if applicable)
- ☐ Confirm that **Registration Open** and **Close Dates** are set correctly. Found in: **Groups > Registration Setup**
- ☐ Set up **Early Registration** Code(s) (if applicable). Enabled from: **Groups > Registration Setup**
- ☐ Confirm that **custom GL codes** are set up for sessions, add-ons, or coupons (if you wish to use custom GL codes)
- ☐ Check the **display order** (chronological or alphabetical).
- ☐ Verify **Registration Authorizations** are set up correctly (if applicable). Found in: **Settings > General > Organization > Registration Settings**.  
Acknowledgments participants review before registering. Not reportable and no electronic signature is collected.
- ☐ The **Convenience Fees** feature is enabled (if applicable). Contact your Client Success Team if you would like this enabled.
- ☐ **Organization Filters** are still accurate. Contact your Client Success Team if they need to be adjusted.
- ☐ Once your registration setup is complete, review all items in your **Registration Test Account**.  
Do NOT deactivate registrations from your Registration Test Profiles; this account will purge before your registration open date

## Finances

- ☐ Ensure you have ACH set up for **Payouts**. Found in: **Finances > Finances Setup > Payout Settings**
- ☐ Update **Payment Plan Due Date** (if applicable). Found in: **Settings > General > Organization > Registration Settings**

Your paragraph text

# CORE LAUNCH CHECKLIST

If you're **not** using the Registration module, please address these additional items:

## First Import

- ☐ Prepare your **Profile Import**

**Note:** The session names listed for each profile must exactly match the session names set up in your organization's account.

- ☐ Finalize the first profile import with your Client Success Team

## Integration

If you have an integration with our software:

- ☐ Complete any required integration steps provided by your Client Success Team