TutorCruncher

A Beginner's Guide for Admins

Part 1: Setting up your company

When you start using your TutorCruncher system, the first thing you can do is make your account your own. Many of the details you input within your system, will Help make sure your clients will know exactly who invoices, SMSs and email communications are coming from.

How do I add my logo?

Your logo will appear on all communication you send to your clients via TutorCruncher, including invoices and emails. This logo is also shown on your company login page and in the top left hand corner of the system when you login.

You can go to **System > Settings > Company Details** and upload your company logo.

How do I add additional company details?

TutorCruncher allows you to add your company address and contact details, to make it easier for your clients to get in touch with you.

Go to **System > Settings > Branch details**. Here you can add a variety of details about your agency such as your company address and phone number. These details will show up on invoices sent out to your clients.

Part 2: Adding Your Users

What users does TutorCruncher offer?

Administrators

Administrators are able to see the back end of the TutorCrucher system. The system allows you to give each admin different levels of access permissions depending on what you want them to be able to view or edit.

Tutors

Tutors, as expected are those providing teaching within the system. These users are automatically given their own logins to TutorCruncher. You can view what this looks like by clicking the top right hand corner drop down menu, and under 'Switch Roles' selecting 'Tutor'.

Clients

Clients within the TutorCruncher system are your parents or whoever is paying for a student's tuition. Again, they have access to the system via their own login, which you can view in the same top right hand corner drop down menu.

Students

Students within the TutorCruncher system are the users who are getting tuition. The system is primarily intended for children getting tuition, however if you have any adult student, you can make them both the client and student on their account. This way they are able to manage all of their own tutoring sessions through their client profile and access all bookings via their students login.

Affiliates

Affiliates can earn commission by referring clients to you. An affiliate may be one of your tutors, another tutoring company or school or a completely unrelated contact you have. Affiliates are added to jobs individually and can be added to ad hoc charges.

How do I add my users to TutorCruncher?

TutorCruncher allows you to add users to your account in a variety of ways.

Importing users

If you have a pre-existing database of users you will be able to directly integrate these into TutorCruncher. If you would like a general template of what you need to include within this import you can find this **here**.

To import users you can go to **System > Import** and select the user type you would like to import. Then follow the instructions on the screen.

Sending out a sign up link

If you do not have an existing database of users or don't want to use the import function, you can also send out sign-up links directly to users. There is a seperate sign-up link for clients and tutors so you are able to collect data specific to each user type.

If you would like to access your sign-up link, you can do so by going to **System > Settings > Company Details**. Your link will be in the following format:

For tutors: https://secure.tutorcruncher.com/YOUR_URL_BIT/signup/tutor/
For clients: https://secure.tutorcruncher.com/YOUR_URL_BIT/signup/client/

Replace "YOUR_URL_BIT" with the URL Bit given to you in Company Settings.

Manually Adding Users

If you would like to just manually add users to TutorCruncher, you can do this within the People Tab in the left hand side menu.

Once you have entered a user's name, email address and saved their profile, a Welcome Email will be sent out to them. This email will contain a link allowing them to set their password, login and fill in any additional details.

If you want to learn more about communicating with your users via TutorCruncher, you can look at Part 5 of this beginners guide.

Part 3: Scheduling Lessons

How does the TutorCruncher lesson set up work?

The TutorCruncher Lesson scheduling system is made up of 2 key parts: jobs and lessons.

Each job represents a connection between a tutor and student, or multiple tutors and students. Depending on how you run your business, there are a number of ways you can utilize and organise your jobs. For example, you could create a job for every tutor and student connection you have, or alternatively you can create a job for a specific subject taught by one tutor and add all the students learning that subject with that tutor to the job.

The exciting thing about TutorCruncher is you have the ability to customise your system to perfectly suit your business needs.

How do I create a Job?

1. Navigate to **Activity > Jobs** tab and click the 'Create New Job' button.
2. Fill in the job's information on the form. The job name should be descriptive, but brief. You can write more information regarding the job in the job description.
3. Set the charge type, either per hour or per lesson unit, and the job rates, how much you will charge a client and pay a tutor.
4. You can also set other parameters such as default tutor permissions, tax setups and job caps.
5. Then click 'Submit'.

How do I create a lesson?

1. Navigate to **Activity > Jobs** tab, select a Job and click on the plus icon in the left hand lessons panel.
2. Fill in the details regarding the lesson. A lesson scheduled in the past will automatically be marked as 'Complete', while a lesson schedule for the future will be marked as 'Planned'. *(Pro Tip: If you select a location, TutorCruncher checks whether the lesson conflicts with another lesson at that location.)*
3. Select which students and tutors to add onto the lesson.
4. Pro Tip: If the selected lesson time is not within the tutor's availability or conflicts with another lesson the tutor is on, TutorCruncher will give you a warning.
5. Save the lesson. If the lesson was marked as 'Complete', you will be prompted to submit a report for the lesson.

Part 4: Understanding Accounting

The TutorCruncher accounting tab is the heart of all finances within TutorCruncher, this is where you can send out invoices, take payment from clients and pay your tutors. The system allows you to set up your accounting in a large number of ways depending on how you run your business.

So weather you take payments up front, in arrears or a mix of both, you will be sure to find the right payment set-up for you.

TutorCruncher also offers bespoke invoices which you can completely customise to match your branding and company image.

What payment gateways does TutorCruncher offer?

The TutorCruncher system integrates with Stripe and GoCardless, allowing you to seamlessly and securely take credit card and direct debit payment via TutorCruncher.

You will need to set up these integrations before you are able to take any card payments via either channel. If you have a pre-existing Stripe or Gocardless business account, you will be able to link these with TutorCruncher.

Stripe

1. Go to **System > Settings > Card Payment Integration**.
2. Click Card Payment Integration and follow the instructions on screen.
3. Click ‘Submit’.

GoCardless

1. Go to **System > Settings > Direct Debit Integration**.
2. Click Direct Debit Integration and follow the instructions on screen.
3. Click ‘Submit’.

What payment methods does the system include?

The TutorCruncher accounting tab has 3 key sections. These each represent a different part of the inbuilt accounting system, allowing you to bill your clients and pay your tutors in different methods.

Credit Requests

Credit requests are used within TutroCruncher to take upfront payment. This money is added to a client’s account credit and will be reduced when payments are taken from the client's account.

Invoices

Invoices are used within TutorCruncher to bill clients after lessons have been completed. These can be sent out to clients via email once they have been generated and raised.

Payment Orders

Payment orders are the section of accounting used to pay your tutors. These can be exported and imported into any batch payment system, allowing you to seamlessly pay your tutors.

What is the best accounting set up for me?

Regardless of what accounting model you currently use within your business, you will be able to find an account model best suited for your company. TutorCruncher is designed to align with your business needs, meaning the system can be tailored to you.

Below you can find a list of some of the most common accounting set-ups with TutorCruncher. These are separated into upfront payment models and in arrears payment methods.

Up-front payments

Upfront package payments

The upfront package payment set up allows you to send out a credit request ahead of future lessons. These packages can be pre-defined within TutorCruncher, allowing you to generate and send out credit requests in just a few clicks.

This payment set-up is a great option for those selling package deals for tutoring.

Creating predefined packages

1. Go to **System > Settings > Credit Request Item Categories**.
2. Click ‘Add Credit Request Item Category’.
3. Fill in the details on screen and select submit.

Sending out a Credit Request

1. Go to **Accounting > Draft Credit Request**.
2. Click ‘Create’
3. In the credit request pop-up window you can select a category and edit any details if necessary.

4. In this window you can select whether you want this credit request to be sent immediately or if you want to keep it within your drafts for now.
5. If you choose to add the item into your drafts, you will then need to confirm those items using the blue arrow next to each item.
6. Following this you can raise those invoices by selecting the ‘Raise Confirmed Credit Requests’ button.
7. Now your Credit Requests have been sent and can be found within the ‘Raised Credit Request’ tab.

Upfront payments based on scheduled lessons

Once you have scheduled some lessons you will be able to send out up-front payment bills to users based on future lessons they are taking. You are also able to select the time frame when regenerating these invoices.

This is a great option for those who want to bill for a large number of already scheduled lessons up front, such as for a full term.

1. Once you have scheduled some lessons for a client, go to **Accounting > Draft Credit Requests**.
2. In this tab, select your cut off dates and click regenerate.
3. After a few seconds the credit requests should appear within the left hand ‘Draft Credit Request’ section.
4. You can now choose which items you want to confirm by clicking the blue arrow next to each item.
5. To raise the confirmed invoices, select the ‘Raise Confirmed Credit Requests’ button.
6. Now your Credit Requests have been sent and can be found within the ‘Raised Credit Request’ tab.

Up-front subscription payments

This payment set-up allows you to take up recurring payments for the same amount monthly.

This is a great option for anyone offering a monthly subscription.

1. Go to **Activity > Subscriptions**. Here you can see existing subscriptions and create new ones.
2. Click ‘Create Subscription’. On the detail input screen, fill in your subscription details and what day of the month the subscription should be charged.
3. Select ‘Create Credit Request Item’, this way the subscription charges will appear on upfront payments.
4. Select whether you want the payment active now, and click submit. Your subscription is now complete.

Please Note: TutorCruncher does not automatically generate and send out credit requests on the day of the month you select within Create Subscriptions. You will need to navigate to **Accountings > Draft Credit Requests** and generate, confirm and raise subscription charges.

In Arrears Payment Set-ups

Batch Invoice Payment

This in arrears payment allows you to manually raise all invoices with the click of a button.

This is a great set up for anyone who sends out invoices by-weekly or monthly.

1. Once you have completed lessons (lessons marked as 'Complete'), you can invoice your client.
2. Go to **Accounting > Draft Invoices** and click Regenerate
3. Enter your cutoff start and end date to generate invoices for all completed lessons between and including those dates that haven't already been invoiced, click 'Generate'.
4. Now you will need to confirm the invoices by clicking the blue arrow next to each item, and then click the 'Raise Confirmed Invoices' button.

Automatic Invoices

Automatic invoices mean you will never have to think about invoicing again. Once you have turned the setting on, invoices are automatically sent out to clients as soon as a lesson is marked complete.

This is a great set-up for anyone looking for a set-and-forget accounting set up.

1. Navigate to **System > Settings > Accounting General**.
2. Select the 'Auto-Invoice' Checkbox and click submit.
3. Auto invoice will now set up as default for all new jobs created.

In arrears subscriptions

This payment set up is very similar to up-front subscriptions payment, the main difference is these charges are shown on invoices instead of credit requests.

1. Go to **Activity > Subscriptions**. Here you can see existing subscriptions and create new ones.
2. Click 'Create Subscription'. On the detail input screen, fill in your subscription details and what day of the month it should be charged.
3. Select 'Create Ad Hoc Charge', this way the subscription charges will appear on invoices.

4. Select whether you want the payment active now, and click submit. Your subscription is now complete.

Please Note: TutorCruncher does not automatically generate and send out credit requests on the day of the month you select within Create Subscriptions, you will need to navigate to **Accountings > Draft Credit Requests** and generate, confirm and raise subscription charges.

Part 5: Communicating with your clients

Aside from helping you run your business more smoothly in the back end, TutorCruncher also offers you a variety of automated communication options with your clients. This means you can help to make sure that your clients never miss an invoice or lesson again.

What are automated emails?

The TutorCruncher system offers a wide range of automated emails, which are sent out based on a variety of triggers. These automatic emails can help assure your clients are up to date with their tuition and remember to pay bills and turn up to scheduled lessons.

You can see all of the emails available to client's within TutorCruncher under **System > Settings > Email Definitions**. Here you can also switch on and off any email definitions you don't want your tutors/clients/students to see.

You can also choose not to send emails to certain users by going to their user profile, clicking edit, navigating to 'Address Contact Detail & More' and making sure Notify Via Email isn't selected. Click submit, and this setting will now be added to the user.

How do I customise my email?

TutorCruncher allows you to customer your sending/reply address, email temple, title and logo by using Email Styles. Email styles are a great way to separate different communications within your business.

Example

Let's say you send out a weekly newsletter to your clients. You could create an email style for this purpose specifically. This new email style would allow you to keep communication regarding the news letter separate from other emails such as invoices. This means you can always make sure to stay on top of all communication within your system.

Creating an Email Style

1. Go to **System > Settings > Email Styles**.
2. Click 'Add New Email Style', and fill in the details necessary.
3. Click 'Submit' your new email style will now be ready to use.

How do I apply a new Email Style to my Automated Emails?

If you want to update the sending/reply address or template used for your automated you can do this in two ways.

Editing the Existing Email Style

All of your existing automated emails are based on your pre-defined Default Email Style. You can edit this by going to **System > Settings > Email Styles**, and clicking on an existing email style to edit it.

Apply A New Email Style

1. Once you have created a new email style, go to **System > Settings > Email Definitions**.
2. Click 'Edit' on the email, which you would like to change the template of.
3. Within the email detail screen, click 'Edit'.
4. In the 'Style' drop down menu, select the email definition you would like to apply.
5. Click 'Submit'.

Can I send emails via my own domain?

TutorCruncher allows you to send emails from your own domain, meaning all communication is fully whtilabled.

In order to allow the system to send email via your domain you will need to give the TutorCruncher mail server permission to use your domain. This can be done by copying and pasting a few bits of text from our user guide to your domain page.

If you would like to find out more about how to do this, please see our user guide.

What SMS notifications can I send?

TutorCruncher also comes with its own SMS function allowing you to send our automated text messages to all your clients. Any user who has a valid phone number will be able to receive these notifications.

You can view all the automated SMS notifications by going to **System > Settings > SMS Definitions**. Just like with emails, you can switch these on and off within this section of settings.

You can also choose not to send SMSs to certain users by going to their user profile, clicking edit, navigating to 'Address Contact Detail & More' and making sure Notify Via SMS isn't selected.

If you would like to use the SMS function please get in touch with our team via Email **info@tutorcruncher.com** or via our in-app chat!

How do I customise my SMSs?

TutorCruncher allows you to set up your SMS sending name. This means you are able to send text notifications to your users from your own company name. To enable SMS on your account, please contact us at **info@tutorcruncher.com**.

1. Navigate to **System > Settings > SMS Definitions** and click Edit SMS Name.
2. Fill in your SMS sending name under "Branch SMS Name'.
3. Click 'Submit'. This name will now appear as the sender in all SMSs you send.

Additional Support

If you didn't find what you were looking for, go to our **Help Guide** and look up your question there for an answer.

Please note that the text in this guide has been prepared as of 14/10/2020. To view the guide with all the most recent updates, please visit our **PDF Guides**.