

Educational Affairs Management (formerly Training Plus)

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Academic Affairs - Appointment Management

Tutorial on Using Appointment Management



I. Function Introduction

Appointment management allows merchants to attract traffic to their offline institutions through trial courses. Merchants can list offline trial courses on their online stores. After students purchase these courses, merchants will arrange the trial time, instructors, and store locations for them. Once the arrangements are made, students will receive relevant class information. Students also need to complete the check-in process before attending the online class.

II. Scenario Examples

1. Xiaoe, recommended by a friend Xiaotong, purchased an English oral trial course at a low price. When placing the order, Xiaoe filled in the appointment information (name, phone number, and preferred appointment time). The merchant saw this pending confirmation record in the background appointment management, called to confirm the above information. After everything was okay, the merchant changed the status from 'pending confirmation' to 'confirmed'. Meanwhile, Xiaoe received the appointment notice from the merchant. Later, Xiaoe came to the class as scheduled.

2. Xiaoming learned about an English training institution through an offline flyer and was very interested. So he called to inquire. After understanding Xiaoming's situation, the course

consultant of the training institution recommended that he try a class first. They then agreed to have the class at the Science and Xingyuan Store at 9 a.m. on Saturday. After hanging up the phone, the course consultant manually entered the appointment information. After saving, Xiaoming received the appointment notice for the course. Later, Xiaoming came to the class as scheduled.

III. Function Introduction

1. Appointment Management

Operation path: Log in to the elink background - [Applications] - [Education Administration] - [Appointment Management].

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Through this function module, merchants can intuitively manage students' appointment situations. The appointment status includes 'pending confirmation', 'pending class', 'class attended', and 'cancelled'. It also supports manual appointment and exporting the appointment list.

2. Create a New Appointment

Click 'Add New Appointment'. Entering a mobile phone number will automatically index customers in the store. You can select information such as the time, which trial course, students, instructors, and class locations. After adding, the status will be 'pending class', and the system will automatically notify the customer.

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3. Student Appointment

After students purchase face-to-face courses (sold by class or time period), they can make appointments for the courses arranged by the institution.

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4. Student Course Schedule

After students successfully make an appointment, the corresponding class will be added to their course schedule to help them attend classes at the offline institution on time.

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Enrollment - Online Sales of Courses (Offline Course Products)

Tutorial on Creating New Products



I. Function Introduction

Through recruitment - online course sales, merchants can configure the created courses in the store and sell them online in the form of products.

II. Purpose of Use

Suitable for various education and training institutions to publish offline courses online for sales and recruitment.

III. Use Scenarios

Xiaomei recently had a trial piano lesson at the "Nord Piano Studio". She thought the experience was great, but considering the high price, she didn't sign up on - site. She saw on her WeChat Moments that the teacher from the "Nord Piano Studio" shared a 50% - off course for Double 11. By signing up online directly, she could use a 1500 - off coupon when the order reached 3000. So she paid and signed up for the beginner - level piano course.

After that, the teacher contacted Xiaomei to confirm the class schedule and added Xiaomei to the class corresponding to the course she purchased. From then on, Xiaomei can follow the class schedule for lessons and consume the course.

If Xiaomei's class time is quite random and she can't attend classes regularly with the class, she doesn't need to be added to the class corresponding to the course she purchased. In this way, when she wants to take a class, she can make an appointment for a scheduled class of the purchased course on the WeChat H5 store (provided that the appointment for this class is available).

IV. Operation Path

Merchant side: Merchant background → Education + → Recruitment → Online course sales → New product

Student side: WeChat H5 store → Offline course product list → Offline course product details → Purchase offline course products

V. Usage Tutorial

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Step 1: Create a new product

Click [Applications] - [Teaching management] - [Recruitment], then click [Create new product]

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(1) Edit basic product information

You can edit the product name, product description, product cover, and product details

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Pricing methods: There are 2 types: per class hour and per time period. Each course must select at least one pricing model. The pricing model set on the course side is the total pricing model for this course. The available sales methods in [Recruitment - Online course sales] and [Recruitment - Enrollment and renewal] are all restricted by the pricing model set for the course.

If you set it to be listed immediately, the product will be displayed in the store upon release.

If you set it to be listed at a scheduled time, the product will be displayed in the store after the set time.

If you set it to be hidden after listing, the product can only be accessed via a link.

If you set a listed product to stop sales, the product will no longer be sold.

(2) Edit course start information

After creating the product, you can edit the relevant information about the course start in the product details.

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[Instructor]: You can add instructors. Only employees with the role of "teacher" can be associated with the course.

- For teachers, you can add their nicknames, which will be displayed on the purchase page for users.

- You can add the teacher's job description, avatar, and introduction. After associating them with the course, well - known teachers can attract more users to purchase.

[Class location]: You can associate the institutional stores where this course can be taught. Users can see the store address and view the specific location when purchasing on the user side.

[Enrollment information display]

- Intended class time: If the course requires users to note the specific time for on - site experience when placing an order, you can check the "Intended class time".

- Intended class location: If you want users to note the intended class location for experience when placing an order, you can check the "Intended class location". If this option is checked, the merchant must associate the course with an accurate specific class location.

(3) Edit operation settings

[Reminder notification settings]: After enabling, class reminders, successful reservation notifications, reservation cancellation notifications, class adjustment notifications, and sign-in notifications will be pushed to users/students via WeChat template messages and SMS. SMS requires recharge, and 200 free SMS messages are provided by default upon activation.

[Message push template]

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[Guide to join the community]: After enabling the guide to follow, merchants need to upload the QR code to be followed and the guiding copy. After C-end users make a purchase, the QR code + guiding copy will be displayed on the payment completion page.

Step 2: Add offline classroom components of knowledge products during store decoration

Add knowledge product components. After adding offline classrooms to the page, users on the promotion page can browse and purchase. The decoration components based on the characteristics of the education and training industry generate more professional sales pages to enhance the user's purchase experience.

Support for selecting offline classroom products

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Step 3: User registration process

- (1) Users can directly reach the homepage or course details page through the promotion QR code;
- (2) On the course details page, users can browse the course name, introduction, teacher introduction, class location, and course details;
- (3) When placing an order, you can customize whether users need to fill in the intended class time and location, and additional basic information of students is required to submit the registration;

(4) After payment is completed, users can view the courses in My Purchased - Offline Courses in the personal center.

Step 4: Merchants process orders

(1) Order viewing and export

Support for an independent list of offline course product orders. Click to view the list of all knowledge product - offline course orders.

After users make a purchase, the registration information can be viewed in the order list, and the order information can be exported.

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(2) Registration information

You can view the registration information of the order, including student information and class information, and jump to the student details page.

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(3) Order details

The details of offline course orders include order information, WeChat payment information, buyer information, and registration information.

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(4) Refund for offline course orders

Online refund for offline course product orders is not supported for the time being. If you need to refund a student's offline course product order, please operate in Students - Enrolled Courses - Withdraw from Courses and complete the refund offline.

