



Using **teachworks.**  
A Guide for Parents



# Introduction

Thank you for continuing to choose Seven Points Prep. To better support you and your family, we have decided to use [Teachworks](#) as our scheduling platform. Teachworks provides teaching companies with business management software to streamline scheduling, improve communication and make payments easier.

This short guide will provide you with all the information you need to make the most of your Teachworks user account.

If you have any additional questions, please reach out directly to our office for assistance and more information.

# Confirming Your Account

We have created and enabled a user account so you should expect to receive an account confirmation email. The email will contain a link that you can click to confirm your account and set a password.

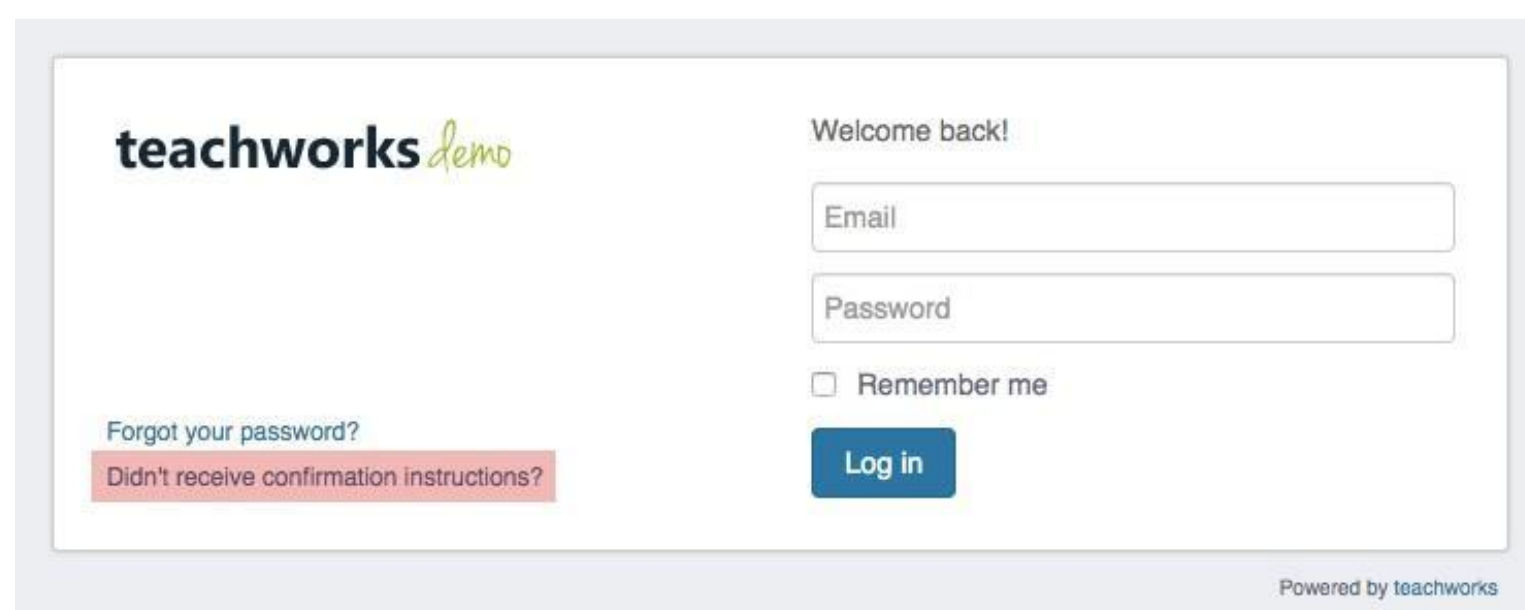
Each company has a unique login page and a link to the page is included in your email. If you plan to access the account often, you may want to bookmark our website for easy access, where we have Teachworks Login Portal at the bottom of the page.

[www.sevenpointsprep.com](http://www.sevenpointsprep.com)

Not sure how to bookmark a page? Here's how: [How to Bookmark a Website](#)

## Resending Confirmation Email

If the link has expired, you can go to our login page and click the "Didn't receive confirmation instructions?" link to fire off a new confirmation email.



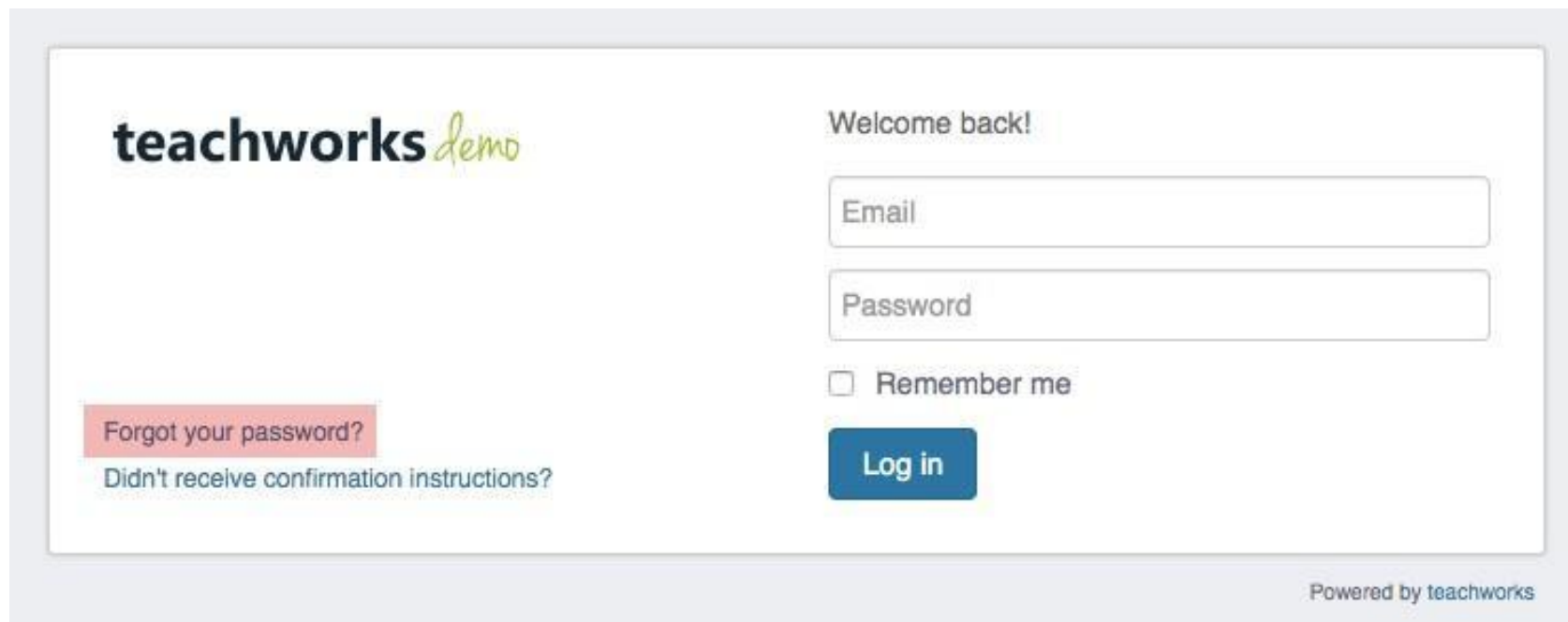
The screenshot shows the Teachworks login page. On the left, the logo reads "teachworks demo". Below the logo, there are two links: "Forgot your password?" and "Didn't receive confirmation instructions?". The "Didn't receive confirmation instructions?" link is highlighted with a red background. On the right side, there is a "Welcome back!" message above a login form. The form includes an "Email" input field, a "Password" input field, a "Remember me" checkbox, and a blue "Log in" button. At the bottom right of the page, it says "Powered by teachworks".

# Resetting/Recovering Your Password

You can update your password from your Teachworks account by going to Account > Update Password (top right).



If you don't remember your password, you can go to our login page and click the "Forgot your password?" link. Clicking the link will prompt you to enter your email address, and if a matching account is found you will receive an email with further instructions.

A screenshot of the Teachworks login page. On the left is the 'teachworks demo' logo. On the right, under the heading 'Welcome back!', are two input fields for 'Email' and 'Password'. Below these is a checkbox labeled 'Remember me' and a blue 'Log in' button. On the left side of the page, there is a red link for 'Forgot your password?' and a blue link for 'Didn't receive confirmation instructions?'. At the bottom right, it says 'Powered by teachworks'.

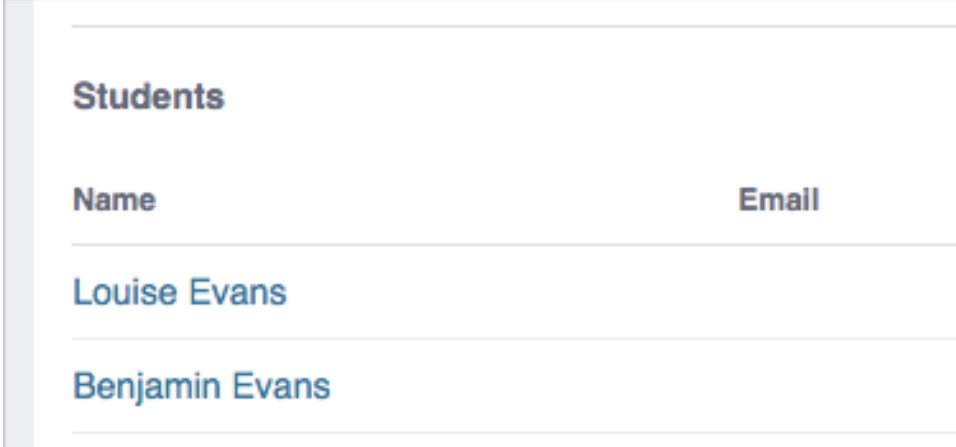
# Updating Your Profile

Once you've logged into your account, you can go to the "Profile" tab and click the "Edit" link to update your details.

- First & Last Name Email
- Address
- Additional Email Address Contact
- Numbers
- Address
- Notification Preferences

*To update your child's details, you can follow the steps below:*

1. Go to "Profile"
2. Scroll to the "Students" section
3. Click on your child's name



Students	
Name	Email
Louise Evans	
Benjamin Evans	

4. Click the "Edit" link
5. Update the profile as needed
6. Submit the form to save your settings

**Note:** If you're not able to update your details, you will need to contact our office with the required changes.

# Accessing Your Billing Details

## Transactions

You can access your invoices, payments, credit notes, and refunds by going to Billing > Transactions.

For more detail, click the name of a record to see the full invoice, payment, credit note or refund.

Date	Record	Type
08/01/2019	<a href="#">INV-27918</a>	Invoice
07/13/2019	<a href="#">INV-27896</a>	Invoice

## Packages

If you've purchased packages, you can go to Billing > Packages to view your package balances. This page will show you how many lessons have been purchased, scheduled or used and will also indicate any overages in red.

Packages				
Customer Name	Student Name	Service Type	Purchased	Schedi
Anderson, Ellie	Anderson, Ellie	English Tutoring	10.0	0.0

**Note:** The pages above can be set to "hidden", so if you can't access them you'll need to contact our office with any billing related questions you may have.

# Managing Your Payment Method

Here at Seven Points Prep, we use [Stripe Integration](#) for processing online payments. You'll be able to add credit card or bank account details to your profile to easily pay your invoices right from your Teachworks account.

## Adding/Editing Credit Cards

1. Login to Teachworks
2. Go to Billing > Credit Cards
3. Click on "Add Card" or edit the card that's saved on your account

## Adding/Editing ACH Details

1. Login to Teachworks
2. Go to Billing > ACH Payments
3. Click on "Add ACH Details"
4. Enter bank account information
5. Verify bank account
  - After entering your routing and account number, you will see a message stating "Your bank details have been saved. Two micro deposits will be put into your bank account. Click the "Verify" link below to enter deposit amounts.
  - Review your bank account for the amounts, and enter them in the verification window. NOTE – DO NOT USE DECIMAL POINTS, only a 2 digit number (\$0.09 should be entered as 09, \$0.24 as 24 into the deposit window).

**Paying Invoices** - Only applicable to one time charges or overdue invoices. Once your preferred payment method is uploaded & verified, we will process payments on the 10th as usual.

1. Go to Billing > Transactions
2. Click on the invoice you would like to pay by clicking the invoice number
3. Click the "Pay Online" button



4. Submit your card details or select a saved card
5. Click the "Pay" button



# Requesting Lessons

You can request lessons directly from the calendar by clicking on a time slot, or you can go to Calendar > Request Lesson.

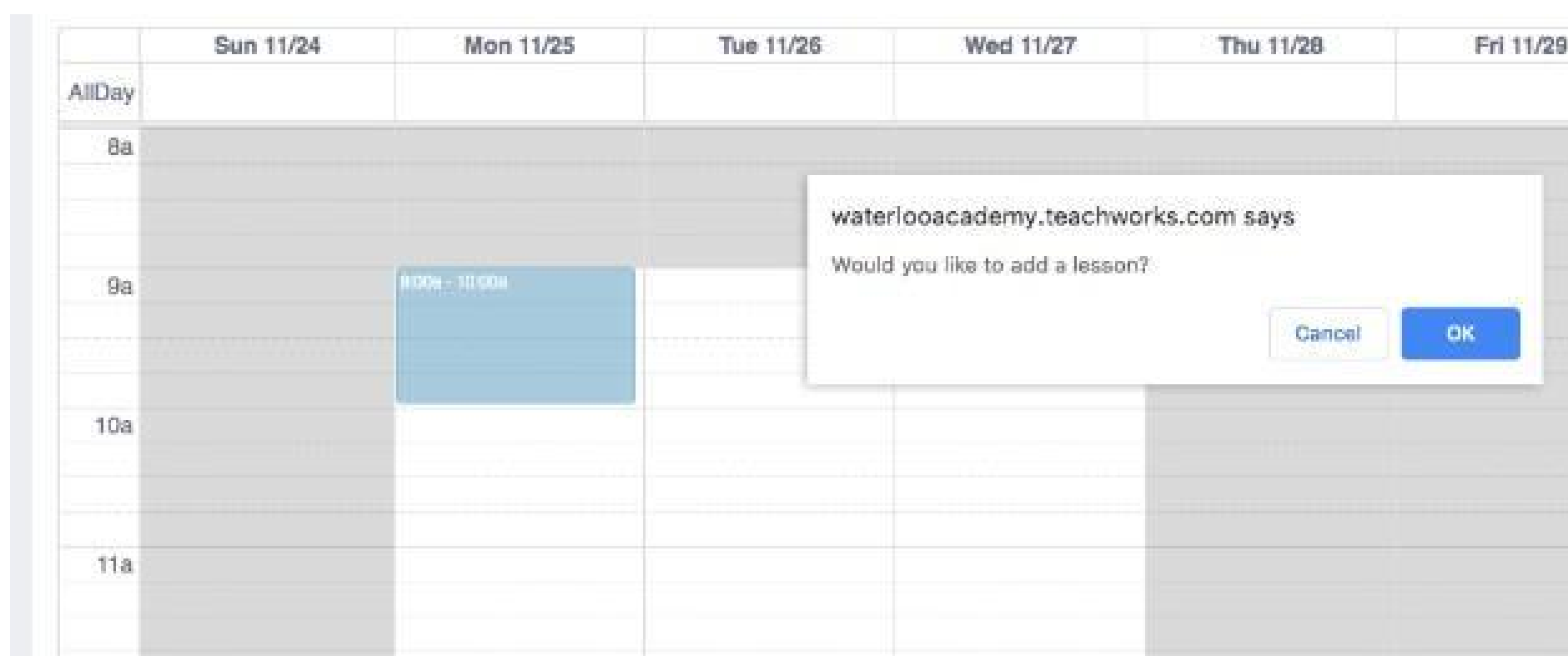
To avoid disappointment, you may want to check teacher availability before requesting a new lesson.

## Checking Availability From the Calendar

- In the sidebar, choose the relevant teacher under "Teacher Availability"



- Toggle to the "Week" or "Day" view.
- Unavailability will be greyed out and you can click on any available time slot to request a lesson.



## Checking Availability From the "Request Lesson" Form

- Select the relevant teacher in the "Teacher" field Select
- your desired time slot
- Click the green "Check Conflicts" button

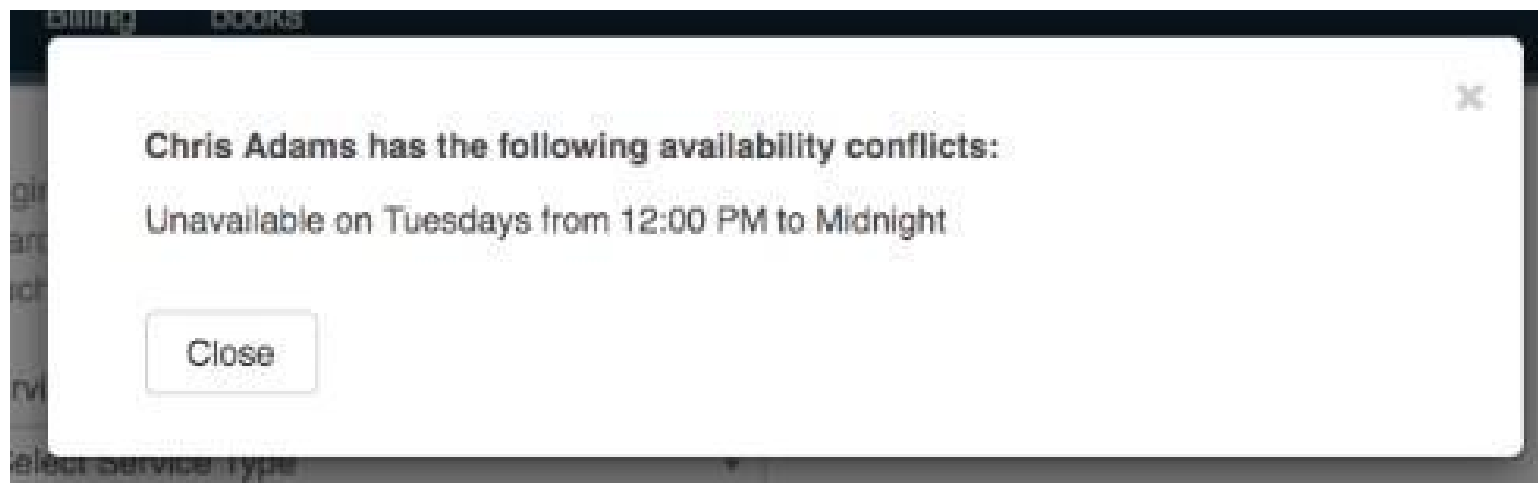


Cancel

Check Conflicts

Submit

- Scheduling conflicts (if there are any) will pop-up on your screen.



After you've submitted your request, you will receive an email from Seven Points Prep that will indicate whether the request was approved, modified or declined.

# Cancelling Lessons

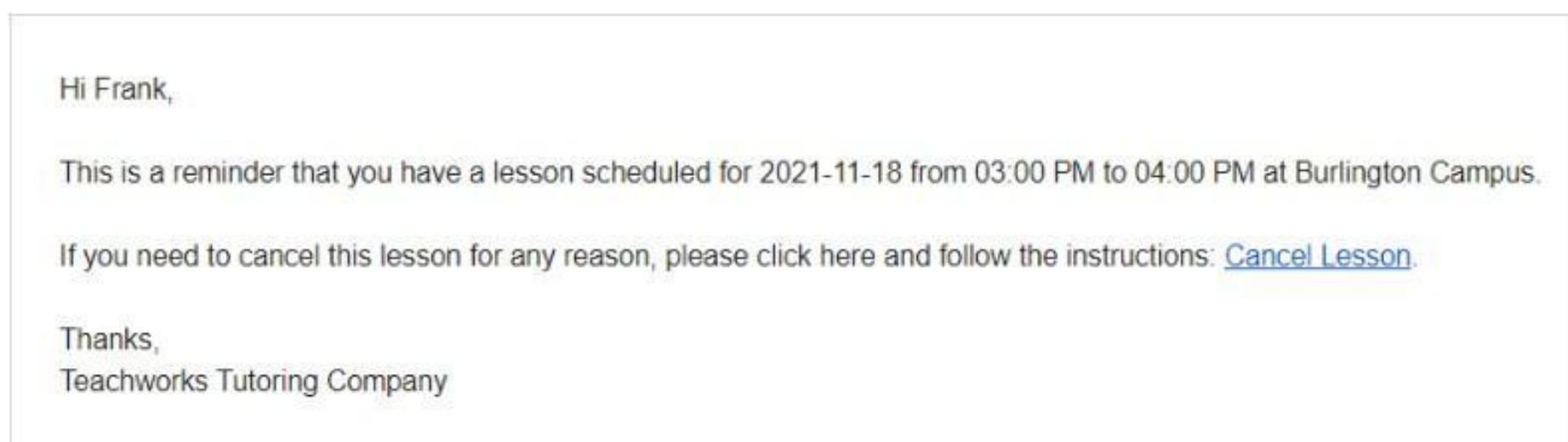
We have also enabled the [Customer Cancellation Add-on](#), which allows you to cancel your upcoming lessons from Lesson Reminders or within your Teachworks account.

## Cancelling a Lesson through a Lesson Reminder

If enabled, this option allows you to click on the "Cancel Lesson" link to cancel the upcoming lesson directly within the Lesson Reminder you receive.

Here's an example of how the cancellation process looks in the lesson reminder:

1. Click on the "Cancel Lesson" link in the lesson reminder email



2. Click "Cancel Lesson" to confirm the lesson cancellation.

You are about to cancel the following lesson for

**Frank Adams**

Title: English with Jim

Time: 2021-11-18 03:00 PM - 04:00 PM

Eastern Time (US & Canada)

Location: Burlington Campus

Teacher: Jim Grant

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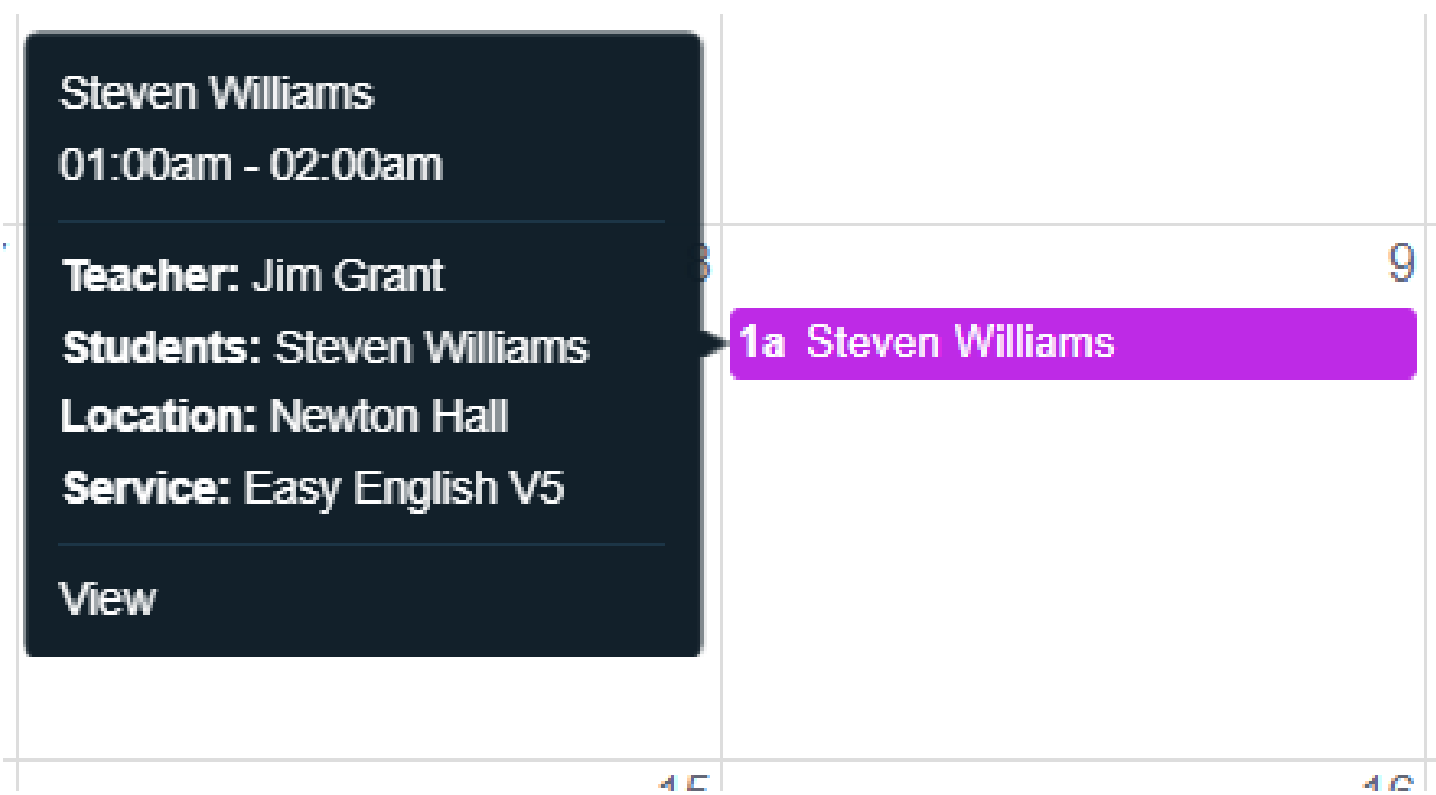
If you need to cancel your lesson, please click the "Cancel Lesson" button below. Please note, if you cancel a lesson within 24 hours of the lesson's start time, we will consider it insufficient notice and you will be charged full price.

Cancel Lesson

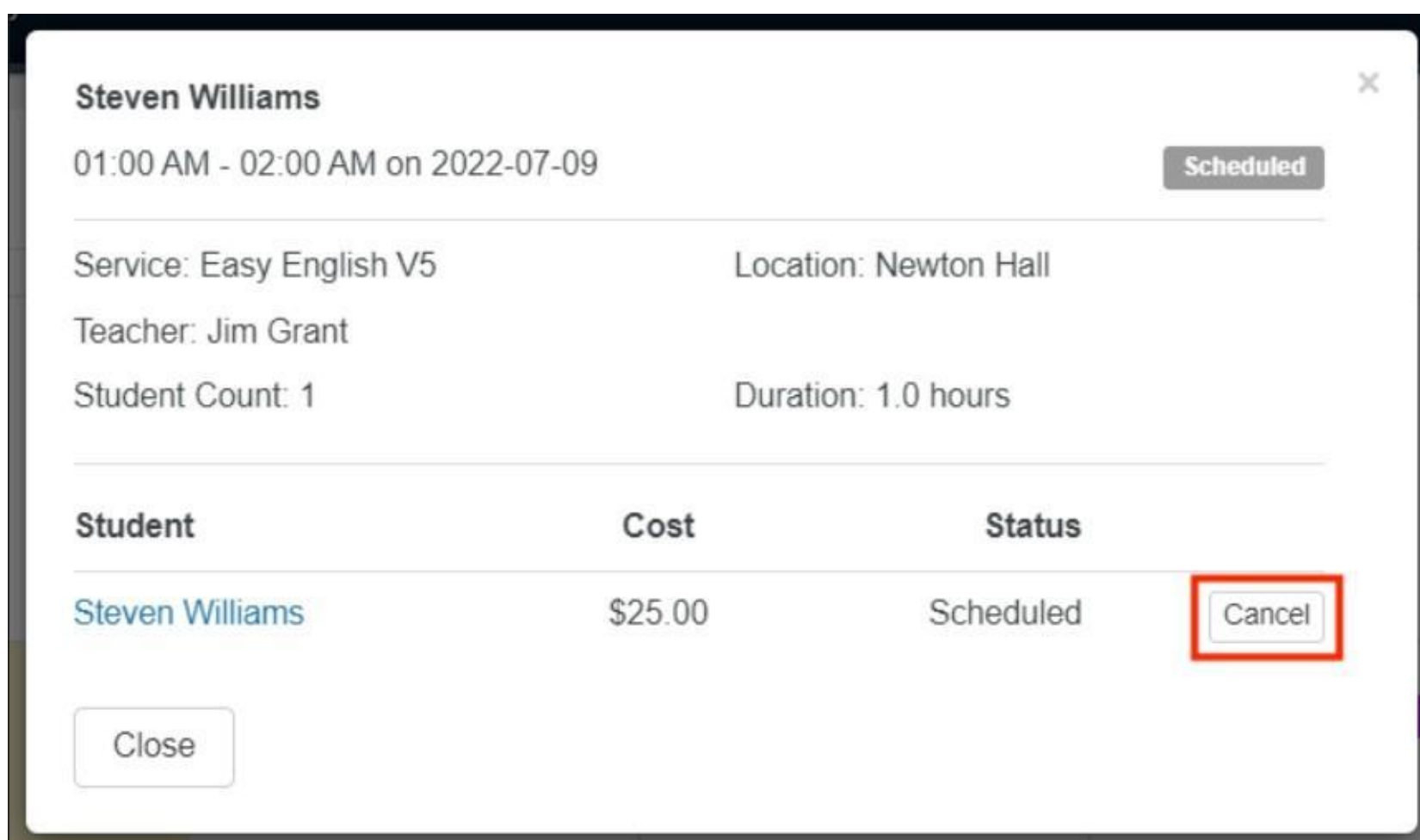
## cancelling a Lesson from Your Teachworks Account

You can also cancel lessons from the calendar in your account. You can follow the steps to cancel a lesson below:

1. Click on the lesson on the calendar and then click the "View" option



2. Click on the "Cancel" button next to the student's name



3. In the form that appears, click on the "Cancel Lesson" button to confirm and cancel the selected lesson



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