



Getting Started

# New AXIS School Set Up

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### New AXIS School Set Up

Setting up your school in AXIS may take **up to four weeks**, this guide will provide step by step instructions of what to do.

#### Week 1


### Create a Billing Provider Account

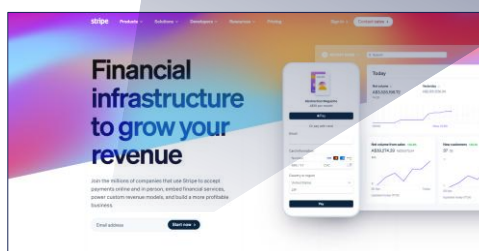
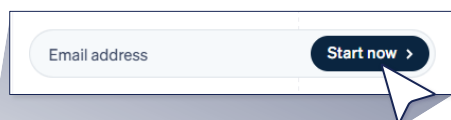
There are **two billing providers** to choose from to take your student membership fees; **Stripe** or **Debit Success**.

#### Option 1: Stripe

Availability: Global

1 Visit [www.stripe.com/au](https://www.stripe.com/au) and create your account.


 **NOTE:** Stripe will initiate a verification process with you which may take some time.



#### Option 2: Debit Success

Availability: Australia / New Zealand

1 Visit [www.xplortechnologies.com](https://www.xplortechnologies.com) and make contact.

 **NOTE:** The Xplor account management team will help you create a Debit Success account. This may take some time to set up and verify your account.

## New AXIS School Set Up

### Setting Up Your AXIS School

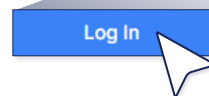
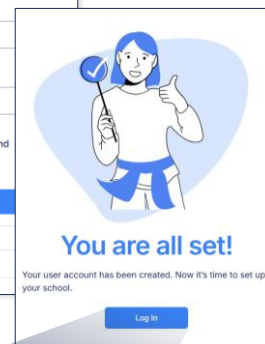
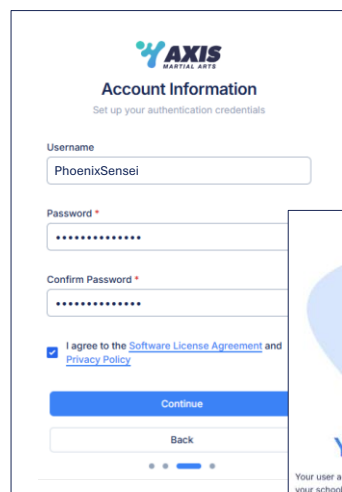
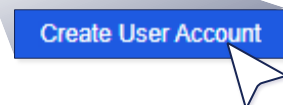
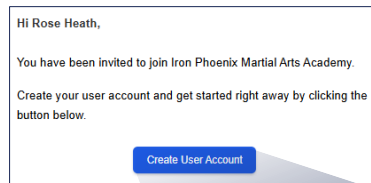
1 Send an email to [support@axismartialarts.com](mailto:support@axismartialarts.com) with your **name, school name, email address, mobile number and school address.**

NOTE: You will then receive an invitation **via email** from AXIS to set up your account and school.

2 Follow the steps to **create your account**, enter your personal information and create your **username** and **password** to log into AXIS Martial Arts.

3 Join the **AXIS Members Facebook Group**, you will receive an invitation via **email.**

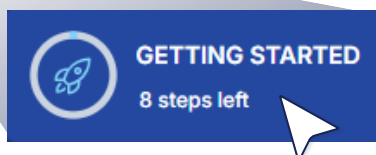
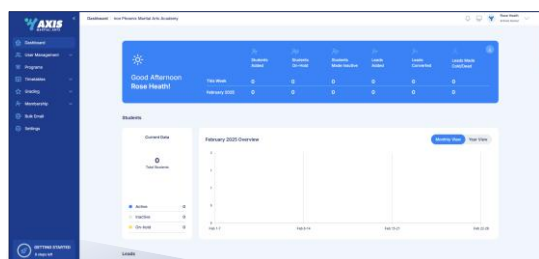
NOTE: The Facebook group is the **resource hub** for all training videos, school owner discussions, latest news and much more.



4 Log into AXIS, follow the **Getting Started steps** to set up your school (this is found in the bottom left of the navigation panel).

NOTE: This includes legal docs, programs and syllabuses, ranks and sub ranks, timetable and classes, training locations and your staff.

**These steps should be completed before you start adding students.**

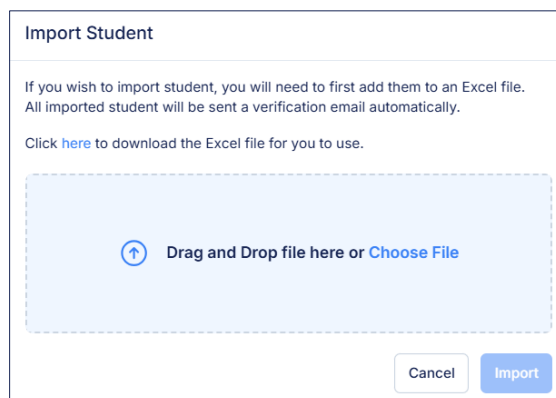
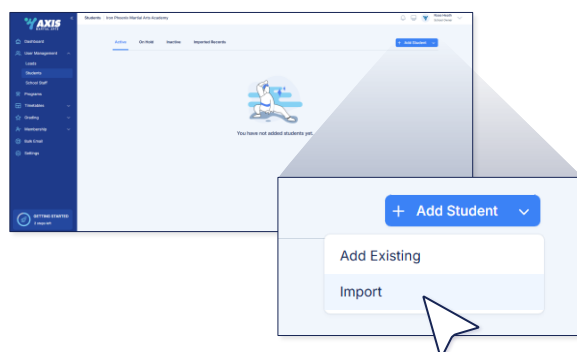


## Adding Students Using Bulk Import

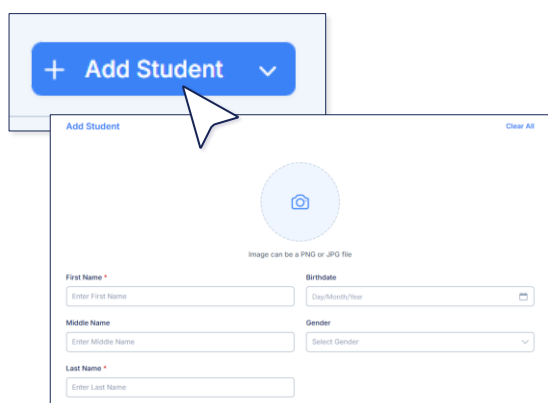
- 1 Navigate to **User Management**, then **Students**.
- 2 In the top right, click on the **Add Student** drop down and select **Import**.
 

**NOTE:** This will download an **Excel template**, enter your student information in **exactly the same format** as the **John Doe example**. You should be able to get this data from your previous software.

**Do not enter an email address** for students **under 18**. You will need to create a relationship to the parent/guardian. Refer to the next page of this guide.
- 3 **Drag and drop** the completed import Excel file into AXIS to create your students.
- 4 Check your students have been created correctly in AXIS.
- NOTE:** When you create a student and add their email address, they will be sent an email to **verify their account** and **sign your legal documents**.



## Manually Adding Students



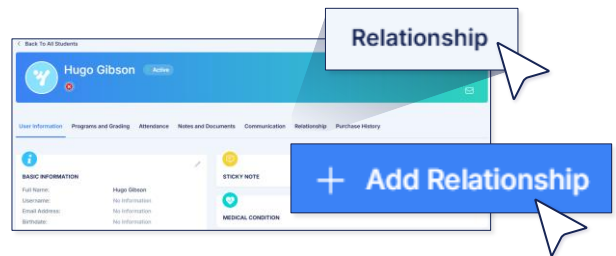
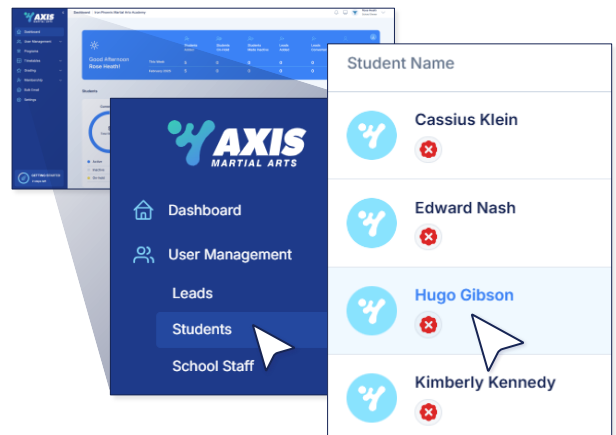
- 1 Click the **Add Student** button.
- 2 Enter **first name** and **last name** (and email for students over 18).
 

**NOTE:** The only mandatory fields are **first name and last name**. The student or parent/guardian can fill in the rest of the information when they verify their account.
- 3 Scroll down and click **Save**.

## New AXIS School Set Up

### Creating Parent/Guardian Relationships for Students Under 18

- 1 Navigate to **User Management**, then **Students**.
- 2 Visit the **student profile** by clicking on their name in the student list.
- 3 In the student profile, click on the **Relationship** tab.
- 4 Click **Add Relationship**.



**Personal Information**

First Name \*

Middle Name

Last Name \*

Email Address

**Relationship to Student**

Relationship \*

**Tags \***

Main Contact
  Emergency Contact
  Family Member
  Bill Payer

Cancel Add

- 5 Complete the **mandatory fields** (First Name, Last Name, Email Address).
  - ★ **NOTE:** The parent/guardian can fill in the rest of the information when they verify their account.
- 6 Select **Relationship Type**.
- 7 Select the **Bill Payer Tag** (you will need this for Debit Success memberships).
- 8 Click **Add**.
  - ★ **NOTE:** If you have created a relationship with a particular email address already, that **email will already be in use**. To use them again, you can find them in **Browse Existing**.

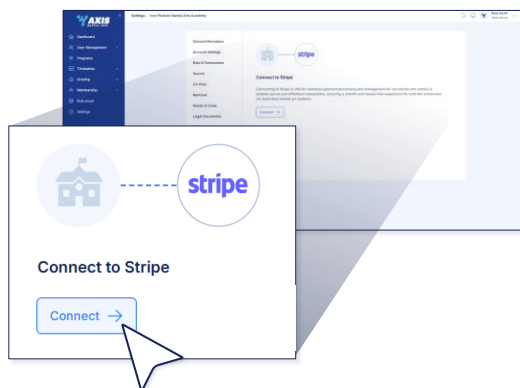
**Getting Started**

**New AXIS School Set Up**

**Week 3+**

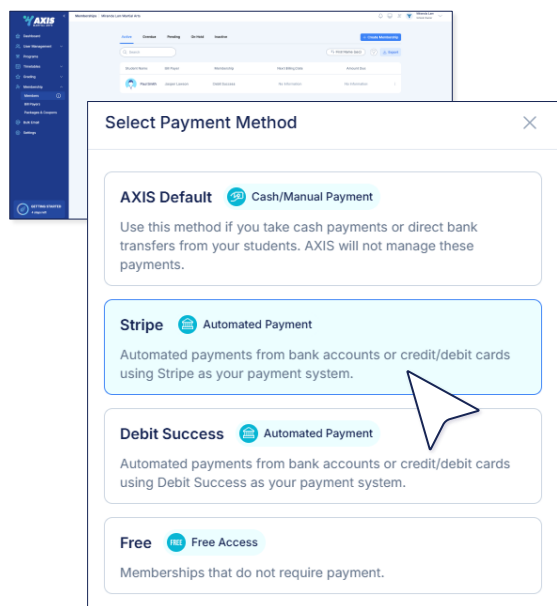
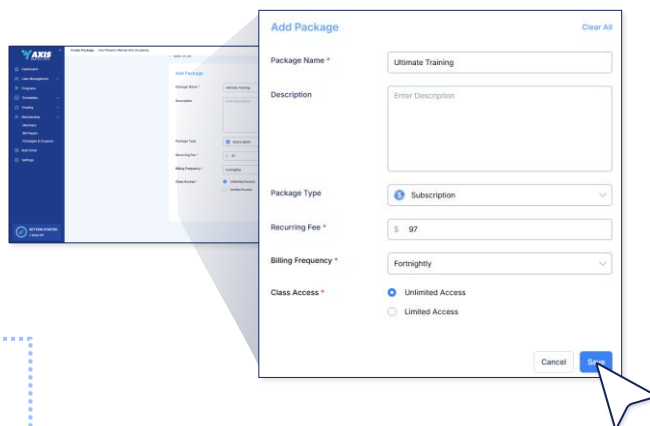
**Connecting your Billing Account to AXIS**

- 1 In the main navigation, click on **Settings**.
- 2 Select **Stripe or Debit Success**
- 2 Follow the steps to **add** your account details.



**Setting Up Your Memberships**

- 1 Create your membership packages and coupons.
- NOTE:** Visit the Facebook Members Group and watch the video 'Create Membership Packages and Coupons'.



- 2 Create a membership for each of your students.
- NOTE:** Visit the Facebook Members Group and watch the video 'Create a Membership and Assign a Syllabus'.

During this process you will:

- **Select a student**
- **Assign the bill payer**
- **Assign the syllabus**
- **Repeat for any siblings**
- **Send agreement to the bill payer**

## How Do I Get Support?

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- For questions regarding Stripe, visit [www.stripe.com/au](http://www.stripe.com/au).
- For questions regarding Debit Success, visit [www.xplortechnologies.com](http://www.xplortechnologies.com).
- For questions and support regarding the AXIS Martial Arts software, ensure you are a member of the Facebook members group, and you have watched the training videos.

**All key processes are covered in detail in these training videos.**

- We are a small team and encourage you to self-serve this training whenever possible, however If you still require support, you can email your query to [support@axismartialarts.com](mailto:support@axismartialarts.com).
- For information regarding current features and the development roadmap, go to the AXIS landing page [www.axismartialarts.com](http://www.axismartialarts.com).

## Which Billing Provider is Right for You?

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- Stripe is a globally available billing platform, it's easy to set up and use, it charges a fee for each transaction, there is no support for overdue payments or issues with customers. This is more suitable for the smaller martial arts school, or any school outside of Australia and New Zealand.
- Debit Success is billing service, available in Australia and New Zealand only, it charges a fee for every transaction, an account manager will support you and look after customer issues and overdue payments. This is more suitable for large martial arts schools with high student numbers in Australia and New Zealand.