StudioPlus Spectra

High School Senior Workflow

What you will learn…

There are many features in Spectra that can be employed by the senior photographer, and this document is designed to give you a good idea of the 'senior' features and some suggestions, with links to more in-depth help for some of the topics:

In this tutorial, we will cover the following:

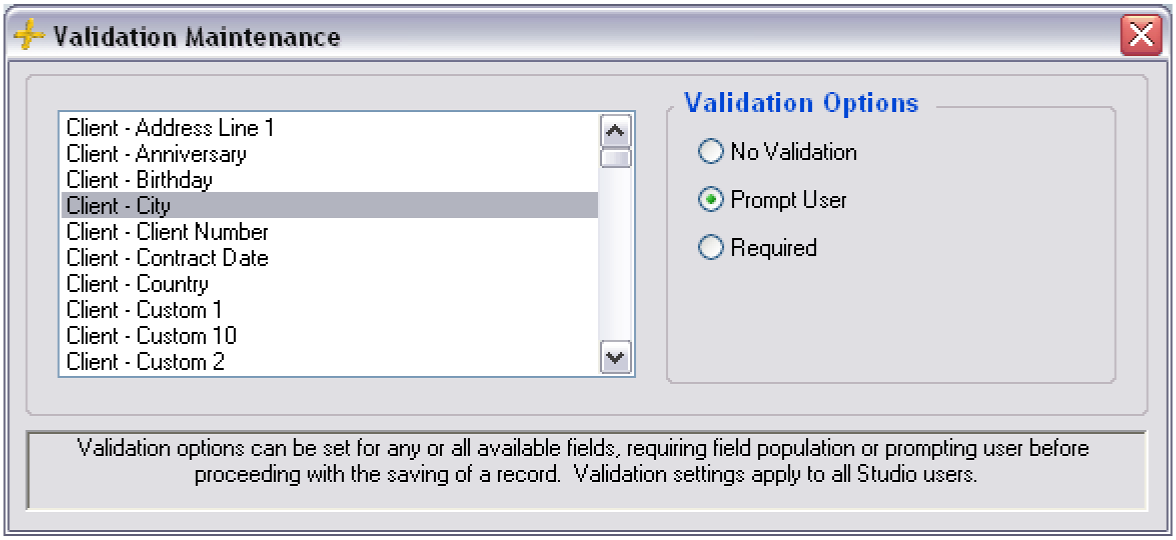
- Initial setup
- Tracking your high school seniors
- Reports

Initial setup

A few minutes of program setup will make senior data management easier than ever! You only need to set up the following items ONCE for your studio. For each senior season, simply go back and make sure these items are already set up properly for your studio.

1. Set up each high school you photograph as an **Organization** in Spectra. Go to **Maintenance > List Maintenance > Client > Organizations**. When naming your school organizations, don't worry about the year. Later, you'll select the organization (school) on the **Client's Organization** tab. This information will automatically carry over to the session(s) you create for this client.
2. If you need to track yearbook poses, add an item to the price list called **Yearbook Pose.** Go to **Maintenance > List Maintenance > Price Lists > Price List**.
3. Make sure that each type of senior session is designated as an **Organization Session Style**. Go to **Maintenance > List Maintenance > Session > Session Types**.
4. Go to **Maintenance > List Maintenance > Client > Client Groups**, and add a new senior group called "Senior." Don't worry about the year here, either. You may also want to add a group for ambassadors. Keep in mind, client groups are your key to successful marketing!
5. If you want to track how new clients hear about you, or if you have an ambassador program, go to **Maintenance > List Maintenance > Client > Lead Sources**, and add lead sources such as "Ambassador," "Radio Ad," "Referral," etc.. You can also use the **Referred By** field on the client record to record ambassador referrals.

6. Now you might be wondering how you'll remember to fill in the organization (school), the graduation year, the lead source, and the client groups. Don't worry; Spectra makes it easy! Add prompts to your client and session screens to make sure data is entered for important senior fields such as **Organization** and **Graduation Year if Organization is Selected.** Go to **Maintenance > List Maintenance > Studio > Data Entry Validations** and select the validations that work for your studio.



Data entry validation maintenance window

Tracking your high school seniors

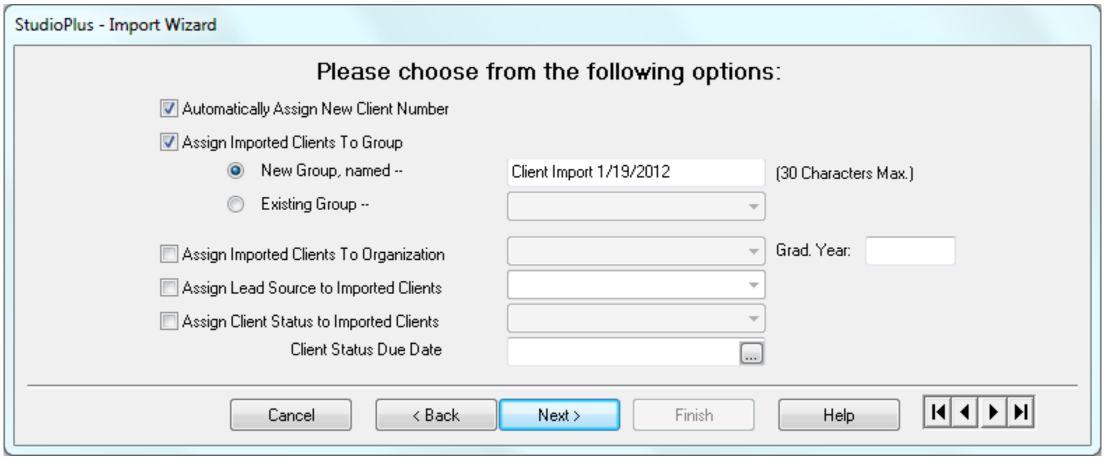
Below are the basic steps that you will go through to record and track high school senior data in StudioPlus.

1. Entering prospects and clients
2. Booking sessions
3. Capturing images
4. Recording print orders
5. Tracking yearbook poses

1. Entering prospects and clients

- ***Adding Individuals:*** As you add high school seniors to your database, select the appropriate **Organization** and **Graduation Year**.
- ***Importing a List:*** You can also import high school seniors into your database from a text file or Excel spreadsheet. Go to **Utilities > Import Clients**. The Import wizard allows you to select the

Organization, **Graduation Year**, and **Lead Source** for the entire import. See the "Importing Client Records" topic in the user guide for more information.



2. Booking senior sessions

- ***Individually:*** Use the **Scheduling** wizard to add senior sessions. Be sure to select the appropriate **Organization** and **Graduation Year**. If you've already entered the **Organization** and **Graduation Year** on the client record, Spectra will automatically carry it over to the session.
- ***Bulk Scheduling:*** Use the **Bulk Scheduling** wizard under the **Tools** menu to create sessions for every student in an organization or group. You can then use **Form Letters** to generate letters or emails to notify them of the date and time of their session. Use **Triggers** to automate these notifications. For more information on using the **Bulk Scheduling** wizard see "Bulk Scheduling" topic in the user manual or view the online training video.
- ***Session Fee Invoices:*** To record a **Session Fee** charged at the time of booking or on the day of the session, open the session and create a **New Invoice**. (Note: This may have already been done as part of the **Scheduling** wizard.)

3. Capturing images: Importing the images into the session

- ***One session at a time (from a camera card or file/folder):*** If you are capturing the senior's images to a camera card (one senior per camera card), or if the images already reside in a folder on your computer, then you will use the **Import Images** feature to import the images into Spectra. Go to the **Digital Workflow > Capture Images** page or open the senior's session record and go to **Action > Import Images**. For more information on capturing images see the "Capture Images" section of the "Digital Workflow" chapter in the user guide or view the online training video.
- ***Many sessions in a row (tethered):*** If you are capturing many seniors at a time and are shooting tethered you will want to use **Group Capture**, under **Tools > Group Capture**. You can search for an existing client or session, or scan a client or session barcode to find the student in your data.

If needed, create the client and/or session record from the **Group Capture** screen. As images are taken, you can review them quickly before going on to the next student. For more information on the **Group Capture** feature see the "Group Capture" section of the "Digital Workflow" chapter in the user guide or view the online training video.

Note: If you are shooting at the school you may want to use the Spectra **OnLocation** add-on. OnLocation allows you to take Spectra with you on location wherever you are shooting or selling, and then bring the OnLocation images and database back to the studio to synchronize with your main database. For more information see the "OnLocation" section of the "Digital Workflow" chapter in the Spectra User Guide or view the online training video.

4. Recording print orders

Whether you print proofs and receive order packets in the mail, or go through an in-studio sales presentation, you will want to record the order in the same way. Go to the Session record go to **Action > Start Sales Presentation**. Then record the order, each package, product and image ordered. Use the standard Spectra Production workflow to track the fulfillment of each order.

5. Tracking yearbook poses

- ***Non Digital:*** Use the **Yearbook Pose** item (created in step 2 of Initial setup) on the invoice to enter the image number. Or, create a **Custom Field** on the session called "Yearbook Pose" and enter the image number there.
- ***Digital:*** Once you have imported the images into the session, right-click on any image in the session and select **Make This Image the Main Yearbook Image.** On the **Session > Organization** tab you can see the yearbook image, who selected it, and the date chosen. If you upload images to InSpiredByYou.com, the student can select their own yearbook pose online.

Note: You may want to add the **Yearbook Pose** field to the **Session Browse** screen as a column, allowing you to filter and search by that field to quickly identify students that have not made a yearbook selection.

- ***Yearbook CD:*** Go to **Tools > Make Yearbook CD** and select options to output all the images for a school to a designated CD or folder, rename the images, and create a text file for the school.

For more information see the "Yearbook CD" topic in the Spectra User Guide.

Reports

Included reports

- **Organization List -** Prints a simple list of all the organizations that have been entered in the Organization Maintenance list. The report includes the organization name, address, phone number, yearbook deadline, and yearbook requirements. Go to **Reports > Organizations > Organization List.**

- **Organization Session List -** Prints a status report of all sessions for one or more organizations. The report is based on a session date range or graduation year, and includes session number, date, client name, home phone, session status, as well as the yearbook pose (if selected). You can quickly see which students still need to select a yearbook pose. Go to **Reports > Organization Reports > Organization Session List.**

- **Organization Session List - Not Photographed -** Provides a list of all clients in one or more organizations that have *not* been photographed. The report includes client names, phone numbers, and status

- **Organization Session Summary -** Produces a session summary for one or more organizations. The report is based on a session date range or graduation year. The report includes total enrollment, how many clients have been photographed and whether they have selected a yearbook pose, and how many clients have not been photographed and why.

- **Yearbook Approval Report -** Gives your studio the ability to preview all the yearbook images selected for an organization. There is an option to base the report on a graduation year. You may also choose which yearbook image to use (primary or secondary).

Dashboard reports

Use your dashboard to create different trends and tracking reports. Go to **Reports > Dashboard Reports** to create new reports. Examples include:

- **Number of Sessions Booked**

- **Photographed by Organization**

- **Total Sales**

- **Sales Average by Organization**

- **Clients by Organization**

Custom reports

Additional reports are available online from StudioPlus. You can preview the reports and download just the ones you want to use. Simply click **Download** and save the report to your hard drive. Unzip the report. In Spectra, go to **Reports > Custom Reports > Import Custom Report** and select the desired report. Here are a few suggestions:

- **Sales By High School** - Analyze your sales broken down by high school and graduation year.
- **Referred By Report** - If you are using the **Referred By** field on the client screen, you can get a report of referrals broken down by who referred them, the number of sessions, and sales totals.
- **Seniors without Sessions** - You can see which senior clients don't have a session booked yet.

Filters

Use the **Filter Builder** to create filters for your information. Save your filters and apply them to screens, lists, and reports. Here's an example of a filter used to find all the students in one school that still need to make yearbook pose selections:

Insert Screen HERE

Additional tools

Spectra OnLocation

If you are looking for a way to take the powerful database and imaging features with you when shooting on location at a school or event, Spectra OnLocation is perfect. All the data and images you capture while away will seamlessly synchronize with your studio data upon return, allowing you to add student's information, capture images, and even print contact sheets or record orders while on location.

For more information on Spectra OnLocation:

- Visit Spectra OnLocation product page: www.StudioPlusSoftware.com/products/onlocation.aspx
- Or watch the OnLocation video overview: www.StudioPlusSoftware.com/products/demo.aspx

InSpiredByYou.com

InSpiredByYou.com is Spectra's integrated online gallery and ordering solution, created specifically for high school senior photographers. Session images are easily uploaded, creating a gallery for each student. Your senior clients are able to select images, invite friends to visit their gallery, choose their yearbook pose, and order prints and packages. All of this information is then downloaded seamlessly back into Spectra for production.

InSpiredByYou.com includes:

- Individual log ins
- Yearbook pose selections
- Image security
- Print and package ordering
- Multi-pose package ordering
- Automatic add-on pose fees
- Promotion codes
- Credit card integration
- Seamless upload and download with Spectra

For more information on InSpired:

- Visit the InSpiredByYou product page on our website: www.StudioPlusSoftware.com/products/inspired.aspx
- Or watch the InSpiredByYou.com video overview: www.StudioPlusSoftware.com/products/demo.aspx

More resources...

Video tutorials

- Scheduling: **Scheduling Wizard**
- Scheduling: **Bulk Scheduling**
- Digital Workflow: **Group Capture**
- Digital Workflow: **Yearbook CDs**
- Tools & Settings: **Custom Reports**
- Tools & Settings: **Filters**
- Advanced Workflow: **Seniors**
- Marketing: **Triggers**