HOLÍSTICA

Holística Guide Platform Manual

Revised June 1, 2026

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Purpose of this Platform Manual

Welcome to Holística! The purpose of this Holistic Guide Platform Manual is to give you step-by-step instructions for using the Holística portal.

Holística supports the following content formats:

- Classes: Online, pre-recorded, in-person, and workshops, or series of online/in-person classes.
- One-one-one sessions: Schedule individual or small-group sessions for coaching or individualized training. You can pre-schedule sessions or set your availability and learners can request sessions.
- Video on Demand: Individual videos or a series of videos using Youtube, Vimeo, uploaded from your system, or using a general weblink
- Documents: Word, PDF, images (JPEG and PNG) and Excel files to share curriculum, lesson plans, and other downloadable resources.

This guide includes instructions for adding and managing these content types.

Note: Holística is still in a pilot phase, so we will be identifying and fixing bugs, as well as improving functionality. If you see a '*Coming soon!*' icon, it means this functionality is in progress, but not quite ready. We will update this Platform Manual and inform guides as new items and features are ready.

Create your Holística Account and Profile

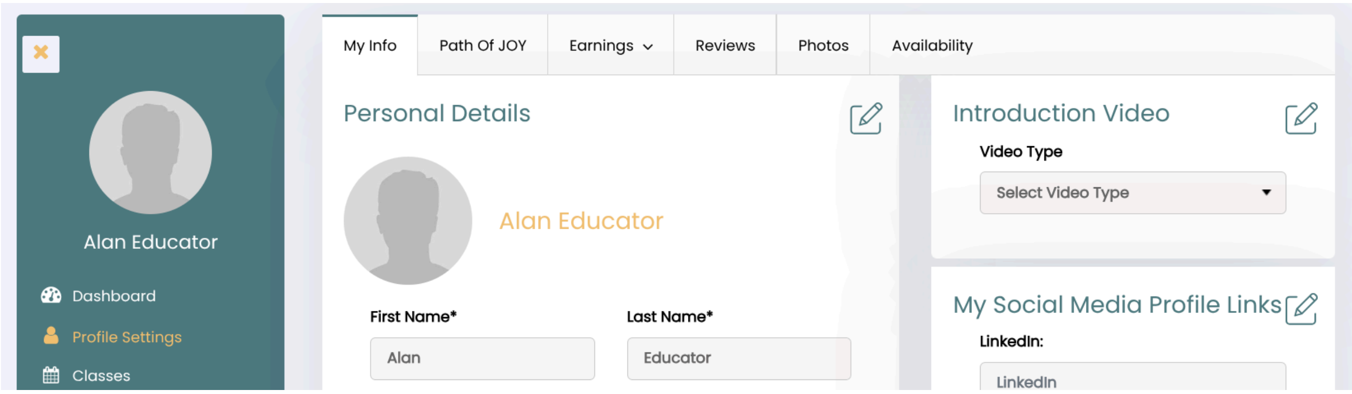
Create your Holística Account

Guides need to create an account to access the Holística site. For the Holística pilot, creating an account is free; Holística is waiving the subscription fee for pilot participants.

1. Go to the Holística - Holistic Guide webpage.
2. Complete the required fields to sign up.
3. Read and agree to the Terms of Service.
4. Click 'Sign Up'.
5. Check to agree to the terms of service.
6. Check your email to confirm your account. Click the link in the confirmation email to activate your account.

Set up your Holística Profile

After you have created an account, log in to Holística and go to the 'Profile Settings' menu option. You will see a variety of tabs across the top of the screen; some are part of the setup process, and others are for reference as you manage your business.



1. **My Info Tab**
   a. On the 'My Info' Tab, add your personal details which will be displayed on the public site (unless otherwise noted).
   b. Click the pencil icon in each section to edit the details.
      i. Personal Detail:
         1. Add your profile picture by clicking the pencil icon in the profile photo placeholder.
         2. Select your Gender and Date of Birth. Note - these fields are not shown publicly to learners.
         3. If needed, update your name and contact details.
         4. If needed, re-set your password.
         5. Make Profile Muted: Guides can 'mute' their profile by selecting 'yes', which means that their profile is not visible on the public site. When you are ready for your content to be visible, select 'no'.
         6. Tag Line: Add a tag line that shows on your Guide profile when learners view your content. This could be a slogan or short summary of what learners can expect from your content.
      ii. Specialties (*Optional, but encouraged*):
         1. About Me: Describe yourself, your qualifications, and details that help learners get a sense of who you are as an educator.
         2. Specialties: Add specialties separated by a comma. For example: Meditation, restorative practices, breathing techniques, etc.
      iii. Booking Policy (*Optional, but encouraged*):
         1. Add details about your booking policy including timing for canceling or scheduling classes or one-on-one sessions.
      iv. Other Settings:
         1. Time Zone: The time zone will default to your current time zone, but you can update it as needed.
         2. Create your own profile link: Holística will give you a default URL for your public profile. You have the option to edit your profile link.
      v. One-on-One Sessions (*Optional*)
         1. If you'll be offering one-on-one sessions for individual or small group coaching, set the details.

        a. Session type: How you'll offer the sessions. You have the option to select 'Free Consultation Booking' if you'd like to offer a first free session before learners sign up for paid sessions.
        b. Length of session you want to offer: Select all that apply, or add a custom length in minutes.
    2. For Stripe Processing Fees:
        a. If you will be paying for the fees, check the box.
        b. If you want to pass the fees on to your learners, then leave the box unchecked.

vi. Introduction Video (*Optional*)
    1. Holistic Educators have the option to add a video that summarizes their content, background, etc.
    2. There are two options to add the video:
        a. Embedded Code: Add the video to your own YouTube or Vimeo account, and then add the embed link.
        b. Upload: Create a video file and save it to your local computer, and then upload it.

vii. My Social Media (*Optional*)
    1. Add links to your social media profiles, if desired. Linked social media accounts should be for professional accounts or accounts that include your holistic education content, not just your personal account.

viii. Payout Information (*Required*)
    1. Guides will use Stripe to receive their earnings.
    2. Click the 'Connect with Stripe' button, and you will be redirected to connect your Stripe account and bank details.

ix. Addresses (*Optional*)
    1. If you will be offering in-person sessions, you can add an address where you will host your sessions. Only add an address if you will be using a public space for your sessions (such as a community center, library, etc.). Do not include your home address.

2. Path of JOY Tab

a. If you will offer one-on-one sessions, add the Path(s) of JOY applicable to your sessions.
    i. If you will not offer one-on-one sessions, you can skip this tab.
b. On the 'Profile Settings' menu option, click the 'Path of JOY' tab.
c. Find the Path(s) of JOY that aligns with your content.You can add one or multiple.
    i. Use the dropdown to filter the list down for an easier view.
b. Click the 'Plus' icon to add the Path of JOY to your Profile.
c. Once the Path of JOY has been added, you will see it at the top of your list.
d. There is a trashcan icon to the side of the Path of JOY if you need to remove it.
e. Once the Path of JOY(s) have been added, you can set availability for one-on-one sessions related to this topic area on the 'Availability' tab.

2. Earnings Tab

    a. When setting up your profile, there is nothing you need to do on this tab.
    b. As you start to make sales, this tab will summarize your earnings and transactions.

3. **Reviews Tab**
    a. When setting up your profile, there is nothing you need to do on this tab.
    b. If a learner leaves you a review, you will be able to see it here.

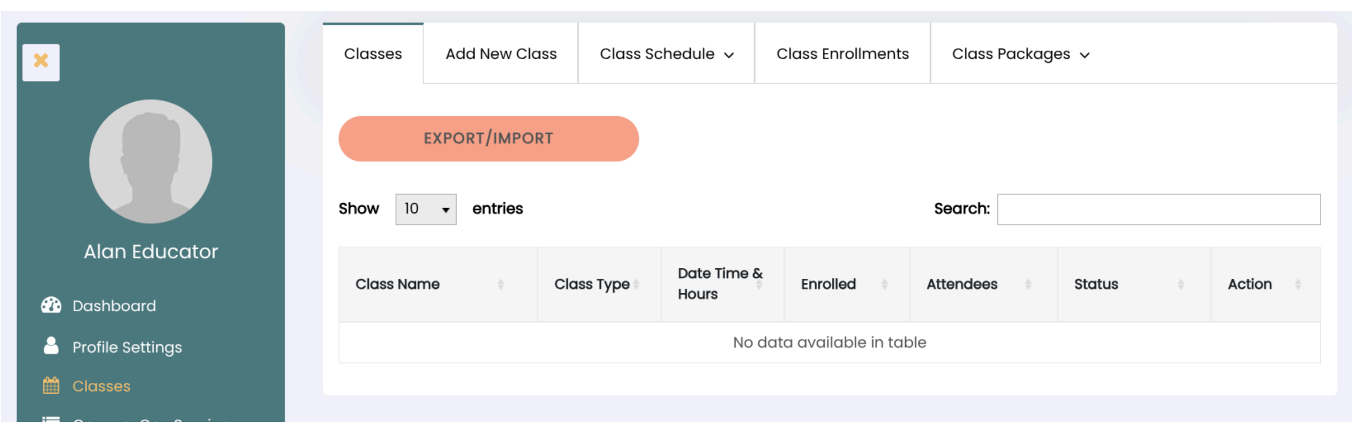
4. **Photos Tab**
    a. Click the box to choose an image, or drag an image from your computer into the box.
    b. Click the 'Upload Image' button.
    c. The image(s) will show as a photo gallery on your public site.

5. **Availability Tab**
    a. If you are offering one-on-one sessions, you will set your availability here.
        i. If you are not offering one-on-one sessions, you will not use this tab.
    b. See the 'One-on-One Sessions' section of this guide for details on how to add availability as part of the One-on-One Sessions process.

Add and Manage Content

Classes

Holistic Educators can offer classes in a variety of formats including online, pre-recorded, in-person, series, or workshops. Go to the 'Classes' tab in the lefthand menu to add and manage classes.



1. **Classes Tab - default view of all classes**
    a. Export/Import classes.
        i. Export - download a list of the classes on this page.
            1. Select applicable fields, and Save.
            2. The file downloads as an Excel file.
        ii. Import - add multiple classes at once.
            1. Note: As you are just getting started, use the 'Add New Class' tab to add classes one-by-one. After you are familiar with the required fields and

details to be added, you can use the Import feature to add multiple classes at once. Please contact hello@holisticacommunity.com to request an Excel template if you would like to use this option.

b. Take action on classes by clicking the three dots under the 'Action' column, including:
    i. Edit
        1. This opens the class page where you can make and save changes.
    ii. Duplicate
        1. Creates another class record with the same details, and you can edit details to save a new class.
    iii. Add New Enrollment
        1. Add an individual to the class.
        2. If they have a JOY Online learner account, once you add their email it will auto-fill the details.
        3. If they do not have a JOY Online learner account, you will add the details for the individual.
    iv. Inactivate Class
        1. Select this option if you do not want the class to be visible on the public site.
        2. When you are ready for the class to be visible on the public site, Activate the class.
    v. Cancel
        1. If you cancel a class, an email is automatically sent to all enrolled learners.
        2. If Learners have already paid and a class is canceled, they will be refunded the amount paid as a JOY Online credit in their wallet. This credit can be used for a future JOY Online purchase with any Holistic Educator, and not just your classes.
    vi. Add Coupon
        1. Title: Add a short title for the coupon.
        2. Description: Add details about what the coupon is for, expiration date, etc.
        3. Coupon Code: choose a short phrase or combination of letters and numbers that Learners will enter in the purchase screen. Example: FALL, 50OFF, etc.
        4. Discount Type: Select percentage or fixed amount. Then, enter the amount (percent or dollars off).
        5. Maximum use per user: Enter the number of times a Learner can use the coupon.
        6. Start Date: Enter the date the coupon will become available.
        7. End Date: Enter the date the coupon will expire.
        8. Coupon Publicly Available: Select 'Yes' to make the coupon available on your public profile. Select 'No' and the coupon will not be publicly visible, but you can share it for Learners to use via email or text messages.
        9. Status: Select 'Active' for the coupon to be active as of the start and end date.

10. Manage coupons in the 'Promotions' menu option.

vii. Mark attendance

1. For classes that have occurred in the past, you can mark attendance and you have the option to send a follow up email.

viii. Delete class

1. This removes the class from your 'Classes' list and from the public site.
2. If the class is in the future, enrolled learners receive email that class has been canceled.

ix. Add Recorded Video

1. Select how many days the video should be active.
   a. Select from default options, or select your own number of days.
2. Select the recorded video type.
3. Add the link to the video.
4. Select the recipients of the video.
5. *Coming soon!* Add to VOD Library
   a. There is currently a technical issue that causes an error when attempting to add to your VOD Library. We are working on a fix, and will let pilot users know once fixed.

x. Send invitation

1. Enter email address(es) to send an invitation email.
   a. This can include users with a Learner account or no account.

xi. Add to Calendar

1. Add the class to your Google, Outlook, or Yahoo calendar.

2. Add New Class Tab

a. Select the class type.
b. Add the Class Name.
c. Select the currency.
d. Enter the price.
   i. You have the option to check 'Would you like to add a discounted price?'.
      1. If checked, the original price and the discounted price will show on the public site.
   ii. Enter $0 if you would like to offer the class for free.
e. 'Would you like to allow extra participants' (*Optional*)
   i. If you'd like to charge a lesser rate for additional participants purchasing the class together. For example, if two parents register for a class, the second receives a discounted price.
   ii. If you would like all individuals to pay the same price, leave this box unchecked.
f. Select one Path of JOY that most aligns with your content.
   i. If your content aligns with multiple Paths of JOY, select one that is the best fit. You can add additional details in the description section.
g. Select the Age Groups for the content.
   i. You can select all that apply, but must select one at a minimum.
h. Add a description for your class.

        i. Include details for any supervision prerequisites, materials needed (if applicable).
        ii. Use the text tools to format your description.
    i. Tags (*Optional*):
        i. Add up to 10 key phrases separated with a comma that will be displayed on the class details page on the public site.
    j. Select the date and time of the class.
        i. Note: You will need to select the time twice to save it.
    k. Set the class duration (in minutes).
    l. The Class Timezone will default to the timezone that is set in your profile.
        i. If needed, change the Timezone.
    m. Optional settings:
        i. 'Make class available through free trial & discount': If checked, coupons and discount codes can be used for this class. If unchecked, coupons cannot be used for the class.
        ii. 'Include class to buy through membership/package': If checked, it allows you to include this class to be purchased as part of a package.
    n. Enter the Maximum Number of Participants.
    o. Online Meeting URL
        i. Create the meeting in your personal Zoom account. Then, add the link to the session here.
        ii. JOY Online Meet: Holística offers a free videoconferencing service called Jitsi Meet. Click 'JOY Online Meet' to set up the link for the class that you and learners can join at the time of the class.
    p. Thumbnail Image:
        i. Click 'Select Image' to add a thumbnail that will be displayed on the public site.
        ii. If you do not select a thumbnail, your profile photo will be displayed as the photo thumbnail on the public site.
    q. Recurring:
        i. Select 'No' if the class is a one-time session.
        ii. Select 'Yes' if the class will be recurring, then select the applicable details.
    r. Click Save.

3. **Class Schedule Tab - view upcoming and completed classes**
    a. Select 'Upcoming' to see a list of your classes in the future.
    b. Select 'Completed' to see a list of your classes in the past.

4. **Class Enrollments Tab - view which learners have enrolled in your classes.**
    a. The list shows all learners that have enrolled in one or more classes.
    b. Click on the 'Total Class Attained' linked number to view the classes that learner has enrolled in.
    c. Use the Search box to enter a learner's first name, last name, or email and the results will filter down.

5. **Class Packages Tab - view, add, and manage packages for classes**
    a. What is a package? A package allows you to set one price for learners to purchase a specified number of products. For example, you have five classes that cost $20 each. You can set up a package for $50 to purchase three classes. The learner can purchase the package, and then on the checkout screen they have the option to use the package to redeem their classes (they do not pay again), or just purchase the individual class as normal.
    b. Package List
        i. View a list of class packages that you have created.
        ii. Under the 'Action' column, you can click the three dots to take the following actions:
            1. View: View details of the package..
            2. Edit: Open the package page where you can make and save changes as needed.
            3. Delete: Remove the package from your Package List and from your Holistic Educator profile on the public site.
            4. Package Purchase URL: Copy the package purchase URL link to share on social media or other external sites.
    c. Add New Package
        i. Package Title
            1. Add a title to summarize the package.
        ii. Package Description
            1. Add details about what is offered in the package.
        iii. No. of Classes
            1. Add the number of classes that the Learner can purchase with the package.
            2. If you wish to allow Learners to purchase unlimited classes for the package, check 'Unlimited Classes'.
        iv. Select Currency
            1. Select the currency for the package.
        v. Price Per Class
            1. Enter the dollar amount per class.
        vi. Package Original Price
            1. This calculates the total price of the package by taking the Price per Class times the No. of Classes.
        vii. Package Price After Discount
            1. If you wish to offer the package at a discounted rate, enter a dollar amount less than the 'Package Original Price'.
        viii. Duration (In Days)
            1. Enter the number of days that Learners who purchase the package will be able to use it to purchase classes.
        ix. Is Best Value Package
            1. If you offer multiple packages, choose the one that you determine is the best value and has the most 'bang for their buck' for what is included.

x. Status
   1. If the status is set to 'Active', the package will be visible and available for purchase on your Holistic Educator public page.
   2. If the status is set to 'Inactive', the package will not be visible on the public site. You can change the status to Active at any time.

xi. Save to add the package.
   1. You can edit/manage the package from Class Packages - Package List tab.

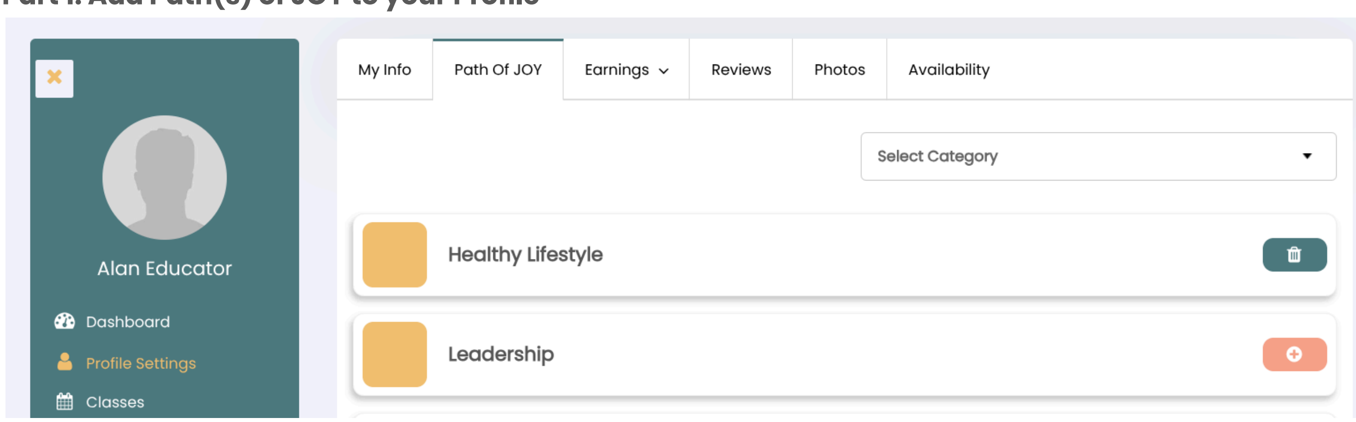
xii. When a Learner purchases a package, they will automatically see the option to use their package to pay for the class if the class has 'Include class to buy through membership/package' checked.

d. Packages Purchased
   i. View a list of packages that have been purchased by Learners.
   ii. Under the Action column, click the three dots to take the following actions:
      1. View:
         a. View the details of the purchased package, including which classes the package has been used for.
      2. Deduct Class:
         a. If a Learner does not book the class using the public website, then you can deduct the class credit from their purchased package.
         b. Upcoming classes that are eligible for the package will automatically display in a list; select the class you wish to deduct from their package.
      3. Expires On:
         a. Update the expiration date for the Learner's class package. The expiration date was originally set in the 'Add New Package' tab, but you can adjust the expiration date for the particular Learner as needed.

One-on-One Sessions

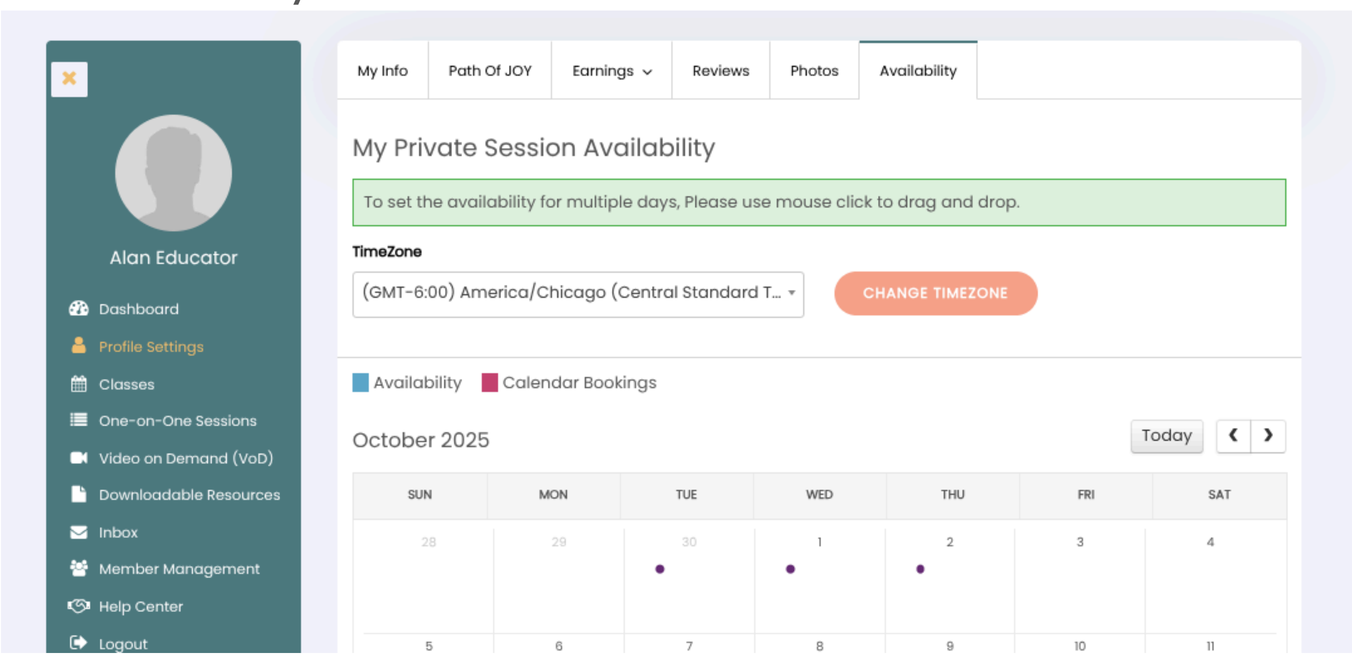
Guides can offer one-on-one sessions for individual or small group coaching. Complete the following actions to add and manage one-on-one sessions.

Part 1: Add Path(s) of JOY to your Profile



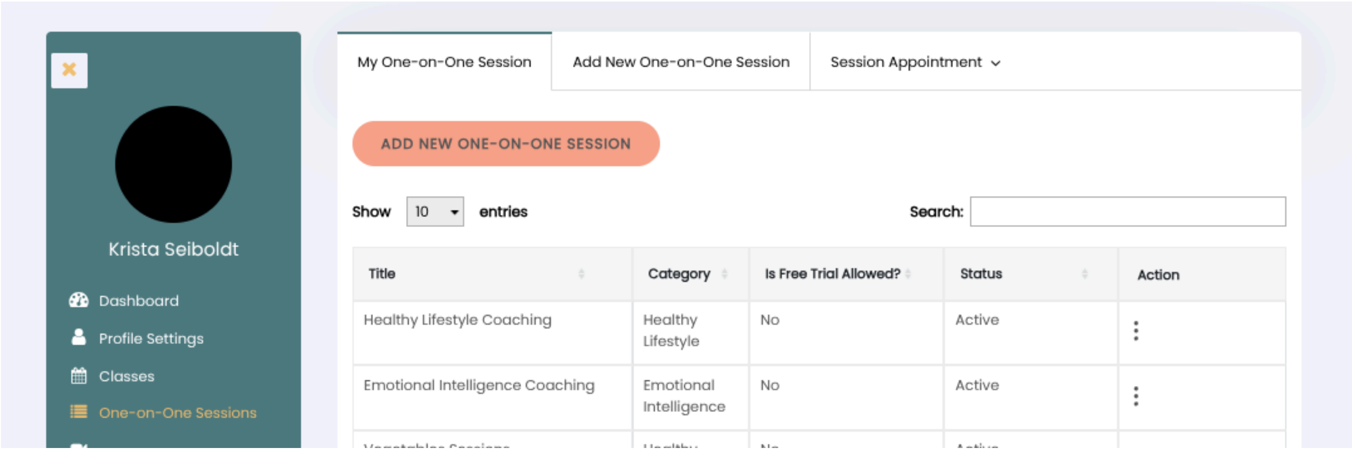
1. On the 'Profile Settings' menu option, click the 'Path of JOY' tab.
2. Find the Path(s) of JOY that aligns with your content.You can add one or multiple.
    i. Use the dropdown to filter the list down for an easier view.
   c. Click the 'Plus' icon to add the Path of JOY to your Profile.
   d. Once the Path of JOY has been added, you will see it at the top of your list.
   e. There is a trashcan icon to the side of the Path of JOY if you need to remove it.
   f. Once the Path of JOY(s) have been added, you can set availability for one-on-one sessions related to this topic area on the 'Availability' tab.
3. Note - once you set your Path(s) of JOY, you only need to do this one time, unless you wish to modify your settings.

Part 2: Add Availability



1. On the 'Profile Settings' menu option, click the 'Availability tab.
2. The TimeZone will default to the time zone on your 'My Info' tab. If needed, select a new time on and select the 'Change Timezone' button.
3. Click a date on the calendar to add availability.
   a. To add multiple dates, click the mouse and drag over multiple dates.
4. A popup window will display.
   a. Select a date.
   b. Under 'What hours are you available?', set a start time and an end time.
   c. Select the Path of JOY that you will offer at this time.
   d. To add a second window of time on the same day, click the '+'.
   e. Check 'Make it recurring weekly' if you want to show availability on the same time and day of week for multiple weeks. Enter the number of weeks.
   f. Click Save.
      i. Note - sometimes, it takes a few seconds for the availability to save.

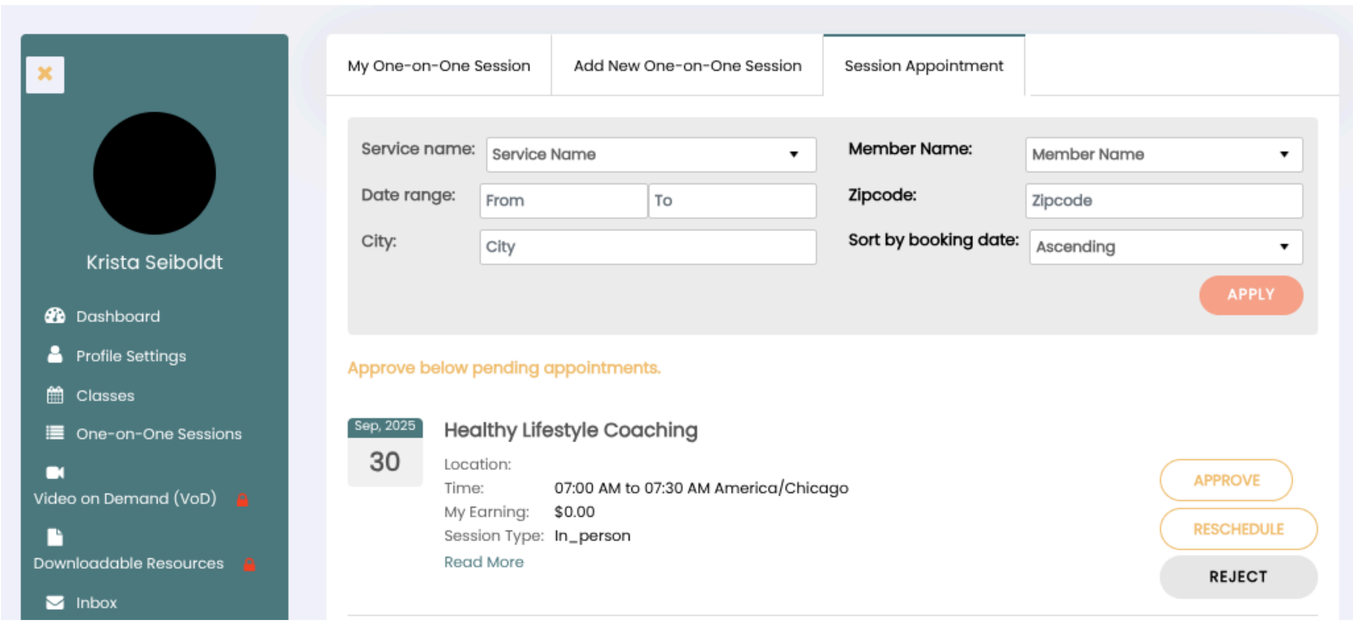
Part 3: Add One-on-One Session Details



1. Go to the 'One-on-One Sessions' menu option.
2. Click the 'Add New One-on-One Session' button or tab. Complete the details:
    a. 'Would you like to allow students to make recurring'?
        i. If you would like to allow Learners to schedule recurring sessions, turn the toggle on.
        ii. Select Daily, Weekly, Bi-Weekly, or Monthly.
    b. One-on-One Session Title
        i. Add a title for your sessions.
    c. Path of JOY
        i. Select the same Path of JOY that you added under Part 1 and 2.
    d. Select the Age Groups for the content.
        i. You can select all that apply, but must select one at a minimum.
    e. Add One-on-One Session Details
        i. Include details for any supervision prerequisites, materials needed (if applicable).
        ii. Include information about the session location - either in-person or online.
        iii. Use the text tools to format your description.
    f. Enter the fees you will charge for applicable session lengths.
        i. You can enter a dollar amount for one, some, or all durations listed.
        ii. You do not need to offer all durations; leave any blank if you do not wish to offer that length of session.
    g. Allow free trial
        i. If you check this box, you will be prompted to select the trial class duration. This initial session will be free, and then future sessions will be charged at the rate set in the 'Fees' section.
    h. Upload Photos
        i. Add the thumbnail for your session offering here. Click the box to choose an image from your computer, or drag and drop a file into the box.
        ii. If you do not choose a thumbnail, your profile photo will be displayed as the thumbnail on the public site.
    i. Save.

3. Once complete, the session will show on the public site and your 'My One-on-One Session tab.
4. On the 'My One-on-One Sessions' tab, you will see all one-on-one sessions you are offering.
    a. You can take the following actions in the 'Action' column:
        i. Edit:
            1. Open the one-on-one session page and modify details as needed.
        ii. Delete:
            1. Remove the one-on-one session from the public site and your list.

Part 4: Approve, Reschedule, or Reject Sessions



1. Based on your availability, Learners can select a timeslot and pay for a one-on-one session.
    a. Learners cannot book sessions for a timeslot unless you have indicated it is available.
2. When a Learner books a session, you will receive an email notifying you.
3. Go to the 'One-on-One Sessions' menu option.
4. Go to the 'Session Appointment' tab, and choose 'Pending'.
5. For each request you can:
    a. Approve: This sends a confirmation email to the Learner.
    b. Reschedule: Suggest a different time for the session.
    c. Reject: Cancels the session. The Learner will receive an email stating that their session has been rejected and they will be refunded the amount paid to their JOY Online Credit Wallet.
6. Once you have taken action on pending sessions, you can view them in 'Upcoming' for future sessions or 'Others' for past/canceled sessions.

Part 5: Communicate Session Details

1. Determine the best way to communicate with the Learners about the session details. Options to consider:
    a. Include details in the Description of the 'Add New One-on-One Session' when setting up the session offering.

        i. Reminder: If sessions will be at your home address, do not include it in the Description.

b. Use the 'Inbox' or 'Member Management' menu option to send a message in the Holística site, which also automatically sends an email message to the Learner.
c. Communicate the session details outside of the site as needed.

Video on Demand (VoD)

Holistic Educators can add videos in a variety of formats. Before adding a video to Holística, select your video format and prepare your video:

- **YouTube Videos**
    - You will need a YouTube channel. View instructions for setting up a YouTube channel.
    - Create your video using your smart phone, computer, or video recording software.
    - Upload the video to your YouTube channel.
    - When you add a video to YouTube, you will select the Visibility.
        - If the video will be free, select 'Public'. Learners will be able to automatically view your video on the Holística site without purchasing/checking out, and the video will be public/searchable on YouTube. Use this option if you have a short teaser video or introductory content that might help encourage learners to purchase your other videos.
        - If the video will be for purchase, select 'Unlisted'. Learners will purchase the video on Holística, and then it will be available in their Video on Demand library in their Holística account.
    - When you are ready to add the video to your Holística account, you will use the 'Get Shareable Link' option to get the URL.

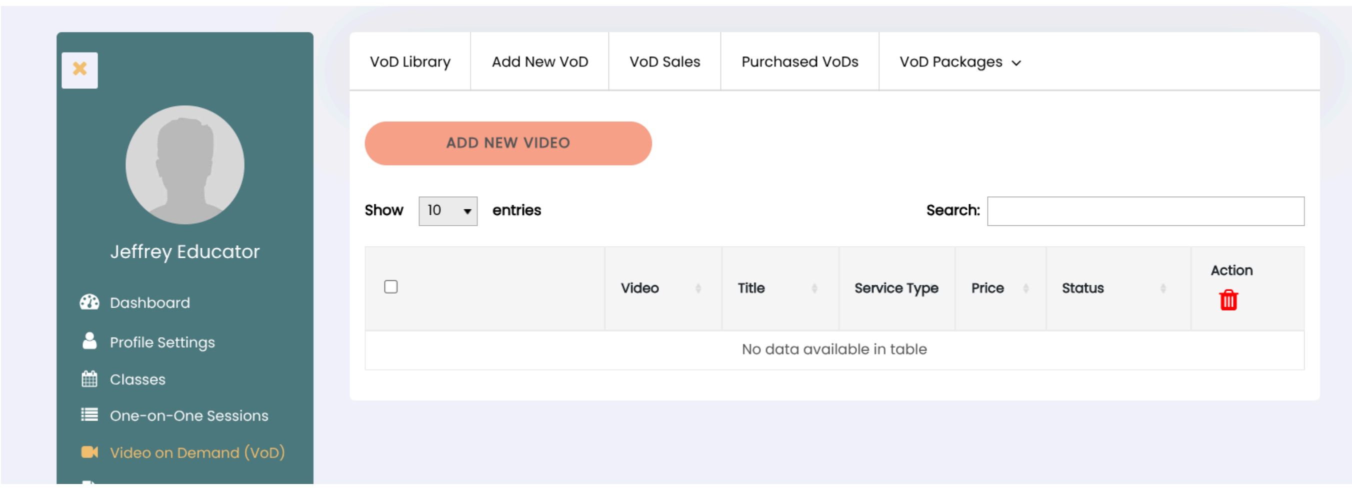
- **Vimeo Videos**
    - You will need a Vimeo account. View instructions for setting up a Vimeo account.
    - Create your video using your smart phone, computer, or video recording software.
    - Upload the video to your Vimeo account.
    - After adding the video, a privacy dropdown will appear.
        - If the video will be free, select 'Public'. Learners will be able to automatically view your video on the Holística site without purchasing/checking out, and the video will be public/searchable on Vimeo. Use this option if you have a short teaser video or introductory content that might help encourage learners to purchase your other videos.
        - If the video will be for purchase, select 'Private'. Learners will purchase the video on Holística, and then it will be available in their Video on Demand library in their Holística account.
    - When you are ready to add the video to your Holística account, you will copy the video link.

- **Videos Uploaded from your System**
    - Record your video using a smart phone or a video recording software.

- Save the video file to your computer.
- When you add a new video on Holística, you will be prompted to upload the video file.
- Note: The maximum allowable file size is 200 MB. If your video file is larger than 200 MB, use the YouTube, Vimeo, or General Video Weblink option.

- **General Video Weblink:**
    - Host your video on another site such as a Zoom account, AWS, Google Drive, or other online location where you have the ability to copy a link to the file.
    - If you use a passcode for the video file, you can share the passcode in the video description or share manually after a learner purchases the video.

Once the video is ready, go to the 'Video on Demand (VoD)' lefthand menu link.



6. **VoD Library Tab**
    a. View a list of videos you have added.
    b. Take action on videos including:
        i. Edit
            1. This opens the video page where you can make and save changes.
        ii. Add/Change Thumbnail
            1. Choose a file to add a thumbnail if you didn't originally add one, or change the thumbnail.
        iii. Inactivate Video
            1. Select this option if you do not want the video to be visible on the public site.
            2. When you are ready for the video to be visible on the public site, Activate the video.
        iv. Delete class
            1. This removes the class from your 'VoD Library' list and from the public site.
        v. Add Coupon
            1. Title: Add a short title for the coupon.

2. Description: Add details about what the coupon is for, expiration date, etc.
3. Coupon Code: choose a short phrase or combination of letters and numbers that Learners will enter in the purchase screen. Example: FALL, 50OFF, etc.
4. Discount Type: Select percentage or fixed amount. Then, enter the amount (percent or dollars off).
5. Maximum use per user: Enter the number of times a Learner can use the coupon.
6. Start Date: Enter the date the coupon will become available.
7. End Date: Enter the date the coupon will expire.
8. Coupon Publicly Available: Select 'Yes' to make the coupon available on your public profile. Select 'No' and the coupon will not be publicly visible, but you can share it for Learners to use.
9. Status: Select 'Active' for the coupon to be active as of the start and end date.
10. Manage coupons in the 'Promotions' menu option.

vi. Share on Social Media
1. Opens a popup screen with the URL to the purchase page for the video. Use this link to share on your other social media accounts or for other advertising/outreach.

7. Add New VoD Tab

a. Add the Video Title.

b. Select the Age Groups for the content.
 i. You can select all that apply, but must select one at a minimum.

c. Select one Path of JOY that most aligns with your content.
 i. If your content aligns with multiple Paths of JOY, select one that is the best fit. You can add additional details in the description section.

d. Add a description for your video.
 i. Include details for any supervision prerequisites, materials needed (if applicable).
 ii. Use the text tools to format your description.

e. Tags (*Optional*):
 i. Add up to 10 key phrases separated with a comma that will be displayed on the video details page on the public site.

f. Video Type:
 i. Select the format of

g. Upload Document
 i. Click on the teal dotted box to search for the file on your computer. Or, drag the file from your computer to upload.

h. Upload Resource Thumbnail
 i. Click 'Choose File' to add a thumbnail that will be displayed on the public site.

8. VoD Sales Tab

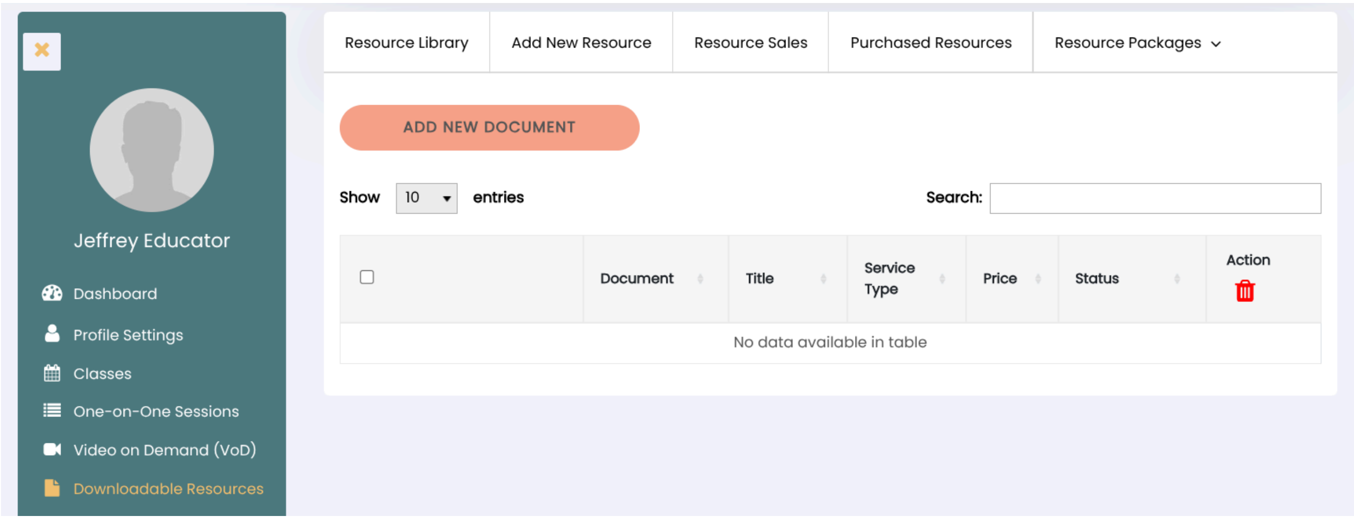
    a. View a list of your videos that have been purchased by Learners.

9. **Purchased VoDs Tab**
    a. We know that educators are lifelong learners. You have the option to purchase videos from other Holistic Educators on the JOY Online site without having a Learner account.
    b. If you purchase videos, they will display here for your use.

10. **VoD Packages Tab**
    a. Package List
        i. View a list of VoD packages that you have created.
        ii. Under the 'Action' column, you can take the following actions:
            1. Pencil icon: Edit the package.
            2. Trashcan icon: Delete the package.
            3. Copy icon: Copy the package purchase URL link to share on social media or other external sites.
    b. Add VoD Packages
        i. Package Title
            1. The package title defaults to 'VoD Pack ($[Price] for [# of Videos] VoDs). For example, 'VoD Pack ($15 for 3 VoDs)'. Note - you are unable to edit the package title.
        ii. No. of VoDs Included
            1. Enter the number of videos to be included in the package.
        iii. Duration (In Days)
            1. Enter the number of days that Learners who purchase the package will be able to use it to purchase videos.
        iv. Select Currency.
            1. Choose the currency.
        v. Cost
            1. Enter the dollar amount for the package.
        vi. Status
            1. If the status is set to 'Active', the package will be visible and available for purchase on your Holistic Educator public page.
            2. If the status is set to 'Inactive', the package will not be visible on the public site. You can change the status to Active at any time.
        vii. Save to add the package.
            1. You can edit/manage the package from VoD Packages - Package List tab.

Downloadable Resources

Guides can add written documents such as lesson plans, activity guides, worksheets, and other resources in a variety of document formats including PDF, Word, Excel, JPG, and PNG.



1. **Resource Library Tab**
    a. View a list of resources you have added.
    b. Take action on resources including:
        viii. Edit
            1. This opens the resource page where you can make and save changes.
        ix. Add/Change Thumbnail
            1. Choose a file to add a thumbnail if you didn't originally add one, or change the thumbnail.
        x. Inactivate Document
            1. Select this option if you do not want the downloadable resource to be visible on the public site.
            2. When you are ready for the downloadable resource to be visible on the public site, Activate the document.
        xi. Delete
            1. This removes the class from your 'Resource Library' list and from the public site.
        xii. Add Coupon
            1. Title: Add a short title for the coupon.
            2. Description: Add details about what the coupon is for, expiration date, etc.
            3. Coupon Code: choose a short phrase or combination of letters and numbers that Learners will enter in the purchase screen. Example: FALL, 50OFF, etc.
            4. Discount Type: Select percentage or fixed amount. Then, enter the amount (percent or dollars off).
            5. Maximum use per user: Enter the number of times a Learner can use the coupon.
            6. Start Date: Enter the date the coupon will become available.
            7. End Date: Enter the date the coupon will expire.

8. Coupon Publicly Available: Select 'Yes' to make the coupon available on your public profile. Select 'No' and the coupon will not be publicly visible, but you can share it for Learners to use.
9. Status: Select 'Active' for the coupon to be active as of the start and end date.
10. Manage coupons in the 'Promotions' menu option.

xiii. Share on Social Media

1. Opens a popup screen with the URL to the purchase page for the resource. Use this link to share on your other social media accounts or for other advertising/outreach.

2. Add New Resource Tab

a. Add the Resource Title.
b. Select the Age Groups for the content.
    i. You can select all that apply, but must select one at a minimum.
c. Select one Path of JOY that most aligns with your content.
    i. If your content aligns with multiple Paths of JOY, select one that is the best fit. You can add additional details in the description section.
d. Add a description for your resource.
    i. Include details for any supervision prerequisites, materials needed (if applicable).
    ii. Use the text tools to format your description.
e. Tags (*Optional*):
    i. Add up to 10 key phrases separated with a comma that will be displayed on the resource details page on the public site.
f. Resource Type:
    i. This will default to 'Upload Document'. You do not need to select or change anything.
g. Upload Document
    i. Click on the teal dotted box to search for the file on your computer. Or, drag the file from your computer to upload.
h. Upload Resource Thumbnail
    i. Click 'Choose File' to add a thumbnail that will be displayed on the public site.

3. Resource Sales Tab

a. View a list of your downloadable resources that have been purchased by Learners.

4. Purchased Resources Tab

a. We know that educators are lifelong learners. You have the option to purchase resources from other Guides on the Holística site without having a Learner account.
b. If you purchase resources, they will display here for your use.

5. Resource Packages Tab

a. Package List

        i. View a list of resource packages that you have created.
        ii. Under the 'Action' column, you can take the following actions:
            1. Pencil icon: Edit the package.
            2. Trashcan icon: Delete the package.
            3. Copy icon: Copy the package purchase URL link to share on social media or other external sites.
    b. Add Resource Packages
        i. Package Title
            1. The package title defaults to 'Resource Pack ($[Price] for [# of Resources] Resources). For example, 'Resource Pack ($15 for 3 Resources). Note - you are unable to edit the package title.
        ii. No. of Resources Included
            1. Enter the number of documents to be included in the package.
        iii. Duration (In Days)
            1. Enter the number of days that Learners who purchase the package will be able to use it to purchase resources.
        iv. Select Currency.
            1. Choose the currency.
        v. Cost
            1. Enter the dollar amount for the package.
        vi. Status
            1. If the status is set to 'Active', the package will be visible and available for purchase on your public page.
            2. If the status is set to 'Inactive', the package will not be visible on the public site. You can change the status to Active at any time.
        vii. Save to add the package.
            1. You can edit/manage the package from Resource Packages - Package List tab.

Managing your Business

Inbox

You can send messages directly within the Holística Site by going to the 'Inbox' menu option in the left-hand or top right menu.

1. To send a message to someone who has purchased content from you:
    a. Click '+ Add New Chat' and select the Learner.
    b. This will open a messaging screen.
    c. Type your message and click 'Send'. The Learner will receive a message in their Holística Inbox and a copy is sent to their email.
2. If you have already started a chat with a Learner:
    a. Go to your Inbox, and click on the Learner's name to view previous messages.
    b. Type your message and click 'Send'. The Learner will receive a message in their Holística

Inbox and a copy is sent to their email.

3. To send a message to someone who has not purchased content from you:
    a. You will need to add them as a member under the 'Member Management' link in the left-hand menu or top right menu.
    b. Click '+ Add New Member' and add their details.
4. Once a member has purchased content from you or you have added them through Member Management, you can send messages directly on the Member Management Page.
    a. Click the three dots in the 'Action' column, and choose 'Send Message'.
    b. Edit the 'Subject Line' as needed, and add the body of your message in the 'Content'.
    c. Once you send a message, it will be visible in your Inbox and a copy is sent to the Learner's email.

Member Management

Go to the 'Member Management' menu option to view a list of Learners that have purchased content from you or that you have added to your Holística profile as a member.

1. Use the '+Add New Member' button to add a new Learner.
2. For individual contacts, click the three dots in the Action column to take the following actions:
    a. Send Message:
        i. Edit the 'Subject Line' as needed, and add the body of your message in the 'Content'.
        ii. Once you send a message, it will be visible in your Inbox and a copy is sent to the Learner's email.
    b. Add/See Notes:
        i. You can add notes related to a Learner. Click '+Add a New Note' to add a note.
        ii. Click 'Add/See Notes' to view previous notes that you have added.
        iii. You can edit or delete previous notes.
    c. Delete:
        i. Remove a Learner from your list. This does not delete their Learner account, just removes them from your list.
    d. Activity Log:
        i. View a history of the content that the Learner has purchased from you.
3. You can take a mass action for all members:
    a. Click the checkbox in the top left corner of the members table, which gives you the following options:
        i. Send Message:
            1. Send a message to all Learners. Once you send a message, it will be visible in your Inbox chat with each Learner, and a copy is sent to the Learner's email.
        ii. Add Notes:
            1. Add a note to all Learners.
        iii. Delete:
            1. Delete all Learners listed on your member list.
    b. *Coming soon!* At this time, Holistic Educators can only take action on individual

Learners or all Learners using the top left checkbox. We are exploring functionality to take action for multiple, but not all Learners at once.

Promotions

Go to the 'Promotions' menu option to add and manage coupons and gift certificates.

1. Promotion List
    a. View promotions
2. Add New Promotion - New Coupon
    a. Title: Enter the title.
    b. Description: Provide a description for what the coupon can be used for, when it can be used, or other relevant details.
    c.

Questions and Support

Frequently Asked Questions

View the Holística Guide Sign In webpage and scroll to the bottom to see a list of frequently asked questions for Holistic Educators.

A separate FAQ is available for learners: Holística FAQ.

Help Center

Log in to your account and visit the Help Center tab. Here you will find step-by-step instructions and frequently asked questions.

If you have a technical issue or suggestion to improve the site, you can submit a ticket and our team will reach out with next steps.

Other Support

For other questions, contact us at hello@holisticacommunity.com.