PARK PRO GUIDE

Ctrl + Click on contents to be taken directly to a section.

This is a working document. Please email any feedback or changes to Operations Assistant @ asi-acassistant@csus.edu

CONTENTS

LOGIN 2
ACCOUNT INFORMATION 2
- CREATING ACCOUNTS 2
- MERGING ACCOUNTS 4
- MOVING ACCOUNTS 6

RENTALS 8
- CHECK OUT RENTALS 8
- CHECK IN RENTALS 9
- VIEW CURRENTLY RENTED 10
- CHANGE NAME OF USER 11

CHANGING CUSTOMER PASSWORDS 13
HOW TO PRINT ID CARDS 15
HOW TO LOOK UP PROGRAMS (CLASSES) 15
REGISTRATION 16
- HOW TO REGISTER FOR A CLASS 16
- HOW TO REGISTER FOR A SUMMER CAMP 17
- GRANTS – HOW TO REGISTER WITH A GRANT 18
- TRANSFERING PROGRAMS 20
- WAITLISTS 22

MEMBERSHIPS 23
- MEMBERSHIP REGISTRATION 23
- CHANGE MEMBERSHIP DATES (LAPSE IN MEMBERSHIP) 24

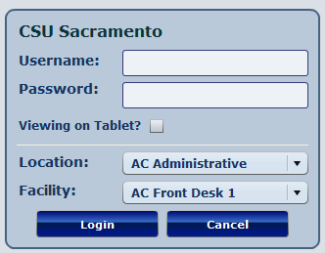
ACCOUNT CREDIT 24
GIFT CARDS 25
CAPITAL CREW 25
- PAYING IN FULL WITH OR WITHOUT BOOSTER & $25 TRY-OUT FEE 25
- PAYMENT PLANS WITH OR WITHOUT BOOSTERS 27
- BOOSTERS 31

ERG SALES 31
OPEINING/CLOSING PROCEDURES 33

DRAFT

CLOSING REPORTS 33
SPECIAL EVENTS 35
TEAM TENTS 35

LOGIN

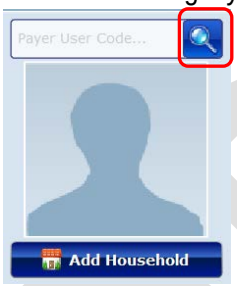


Make sure you select the correct location and facility before you login.

ACCOUNT INFORMATION

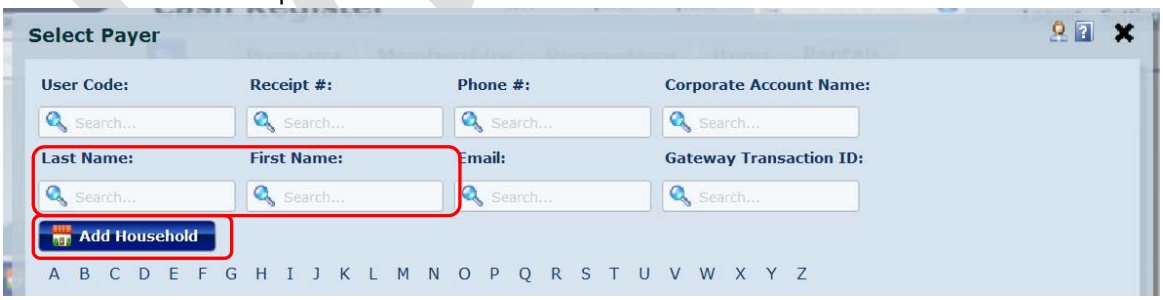
CREATING ACCOUNTS

1. Click on the magnifying glass button.



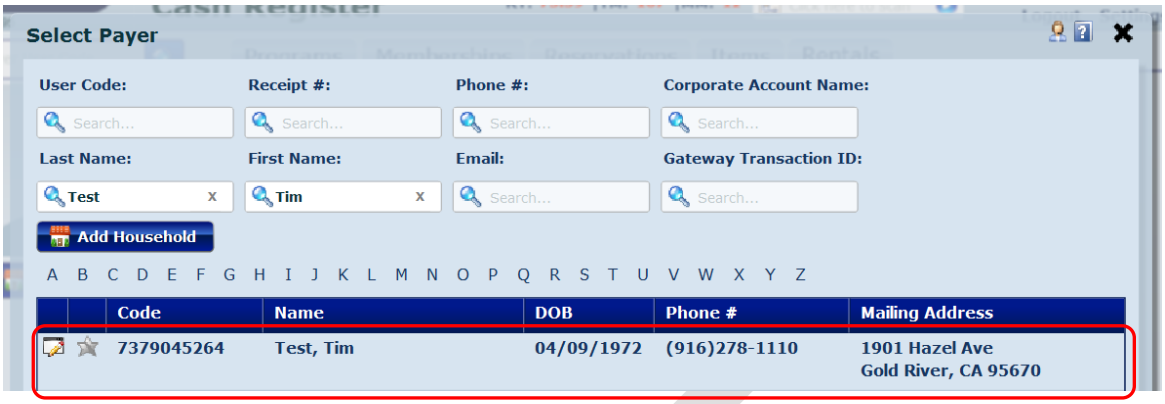
2. If the customer thinks they have been here before try typing their name in the search bars indicated below. If they have not been here before click on the

button to make a new account. Proceed to step #3.



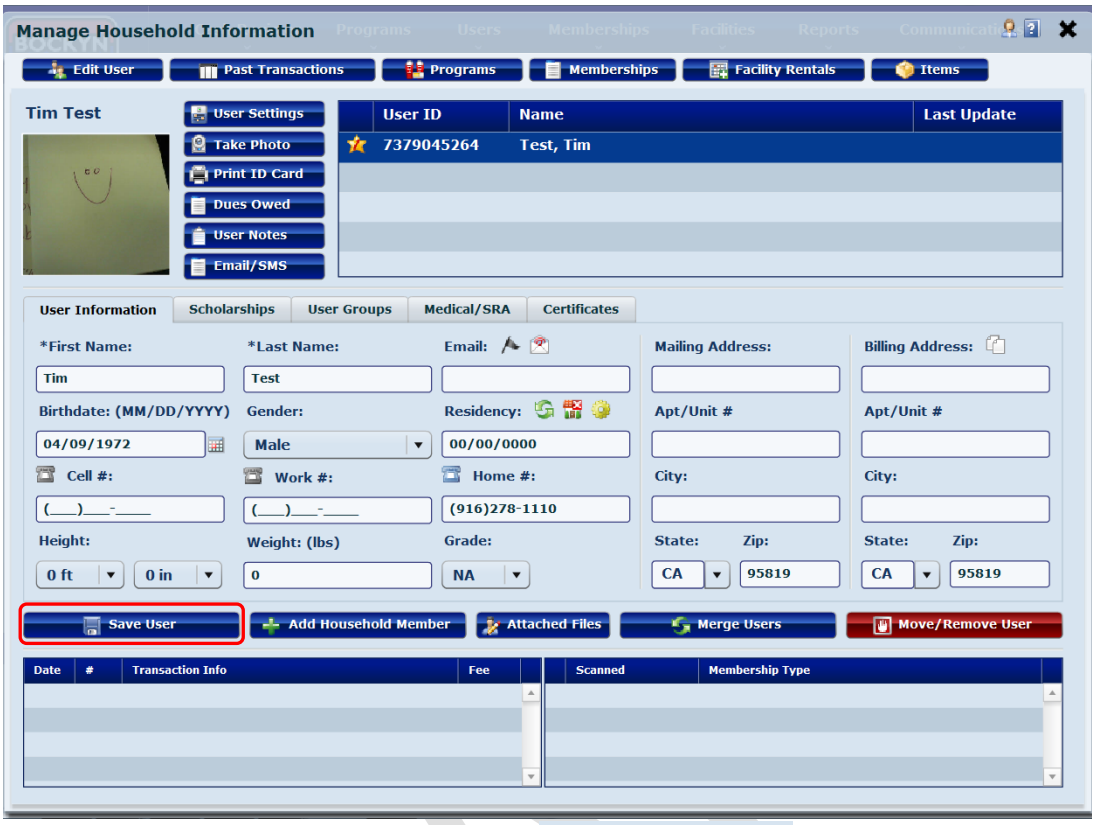
If you type in the customer's information and an account pops up, pictured below, you do not need to create a new account.

DRAFT



3. Enter in the primary account holder's information in the spaces, shown below. When you have entered all information click on the button.

4. Park Pro will automatically pull up the new account. If you need to add more member's to the household proceed to step #5. If you do not need to add anyone to the account you are finished creating the account. If you need to edit information you may do so in that window. Make sure to click when done editing.



5. To add a new household member click on the

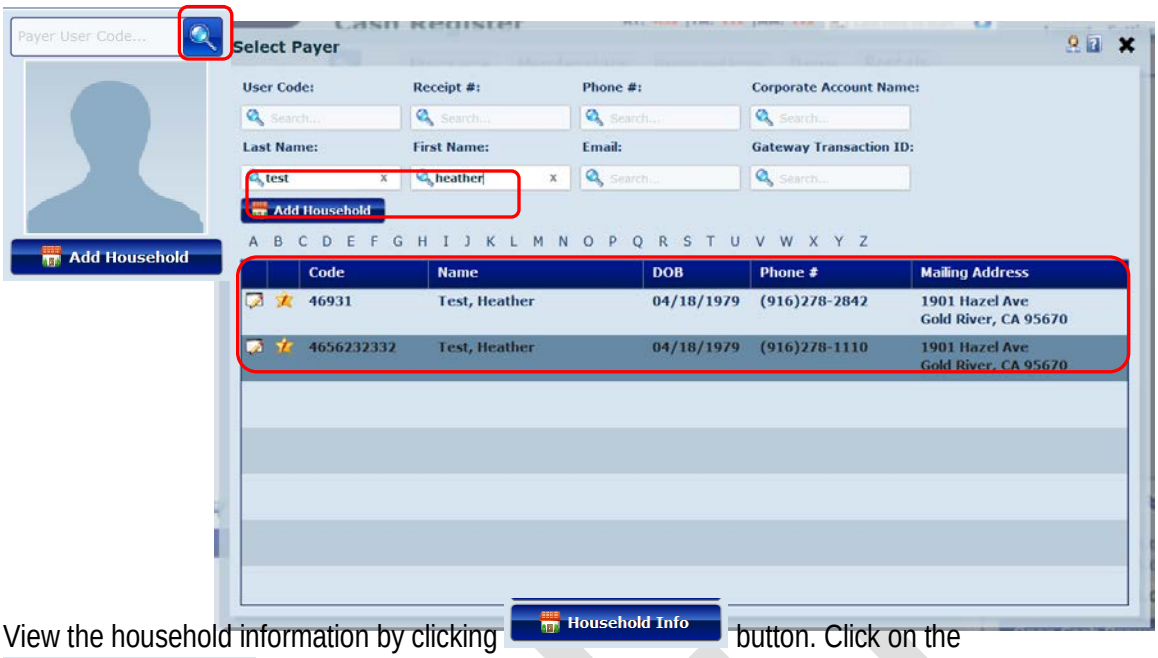
button. Enter the new household member's information. If they are a parent/guardian or 2nd adult in the household make them a secondary contact. If someone else is already a secondary contact the old member will be demoted. You may also make the new member a primary contact, the old primary contact will be demoted to secondary contact.

   When you have entered all the information click on the

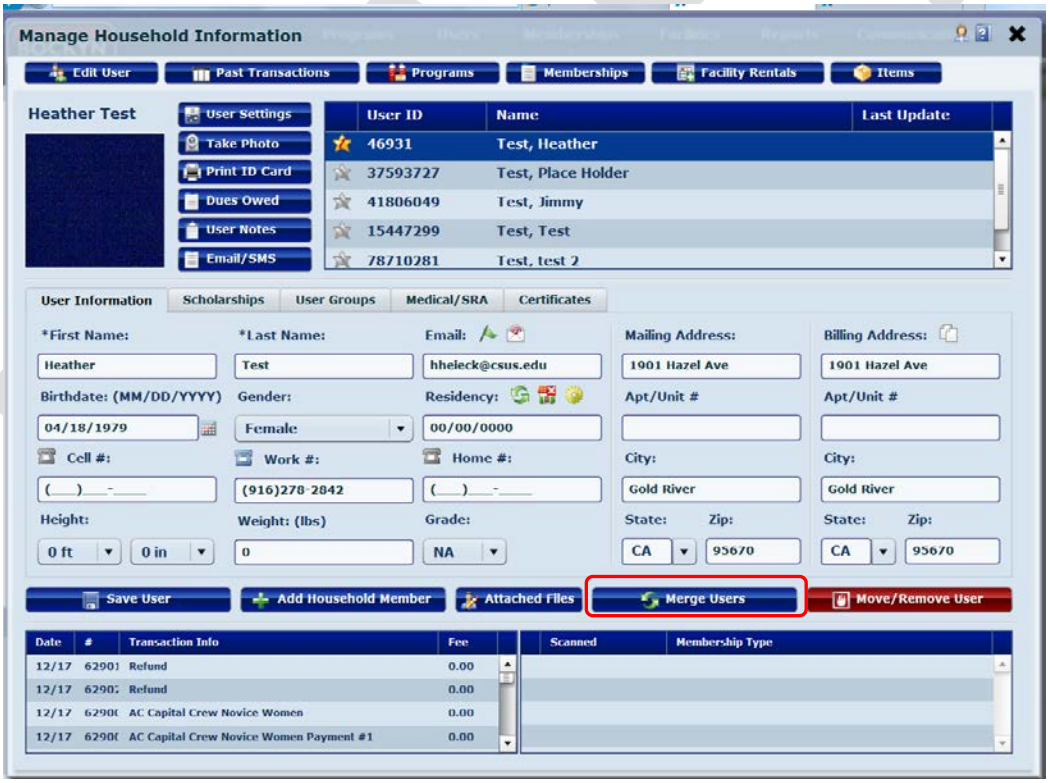
button.

MERGING ACCOUNTS

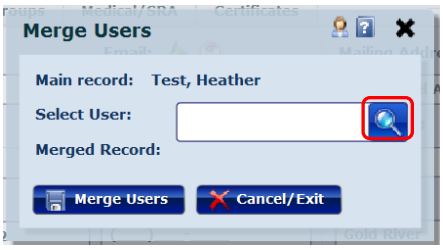
1. Pull up the account you wish to keep by clicking on the magnifying glass then searching the customer's information.



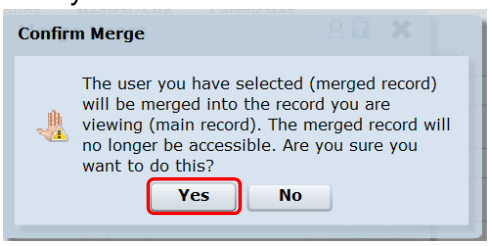
2. View the household information by clicking Household Info button. Click on the Merge Users button.



3. A window will pop up that looks like the one pictured below. Search for the account you wish to merge into your current account by clicking the magnifying glass.

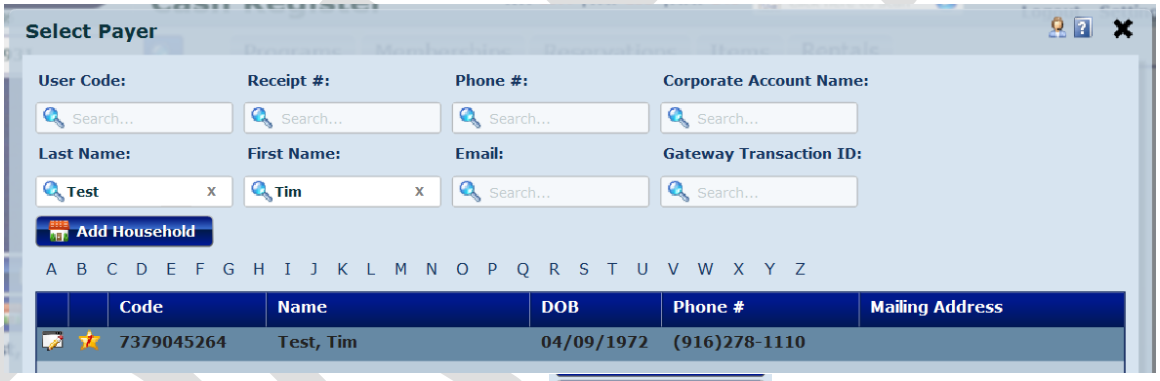


4. A new window will pop up that looks like the one pictured below. Click "Yes" to confirm the merge. Then you are finished.

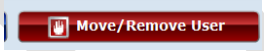


MOVING ACCOUNTS

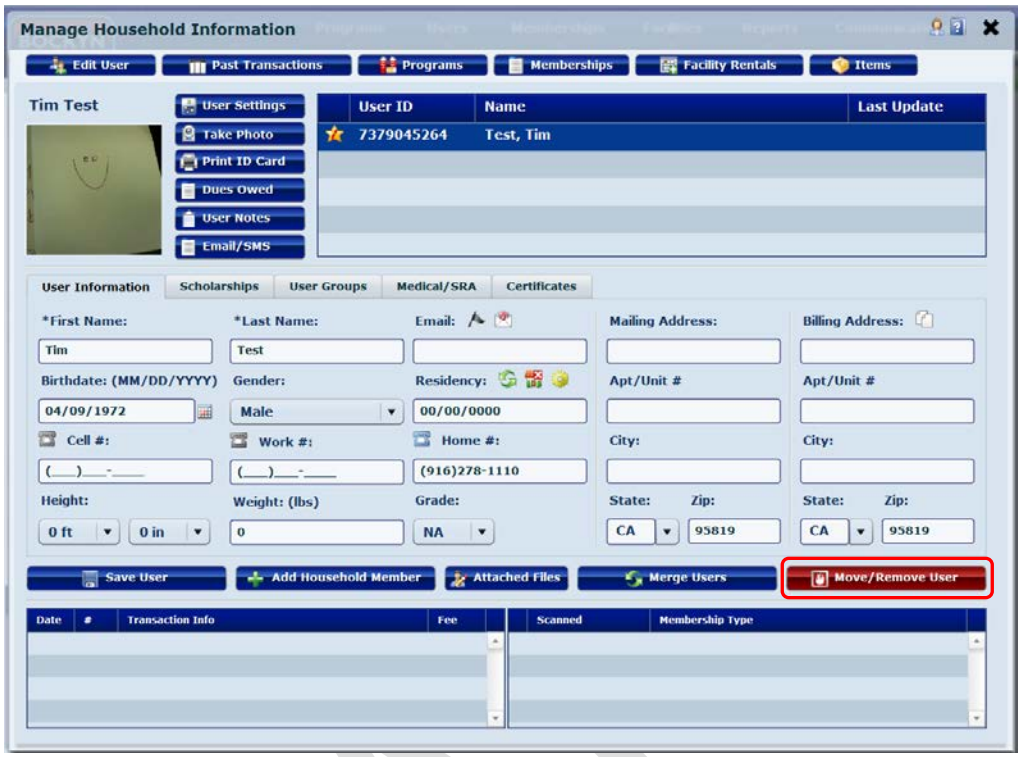
1. Pull up the account you wish to move by clicking on the magnifying glass and searching the customer's information.



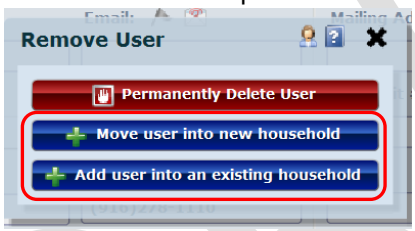
2. View the household information by clicking the

button. Then click the 

button.

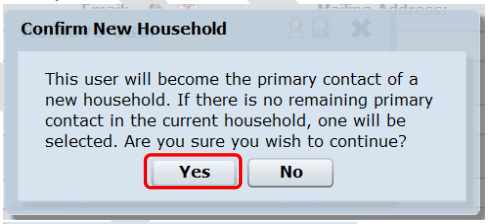


3. You now have two options. Click the appropriate one for the current situation.



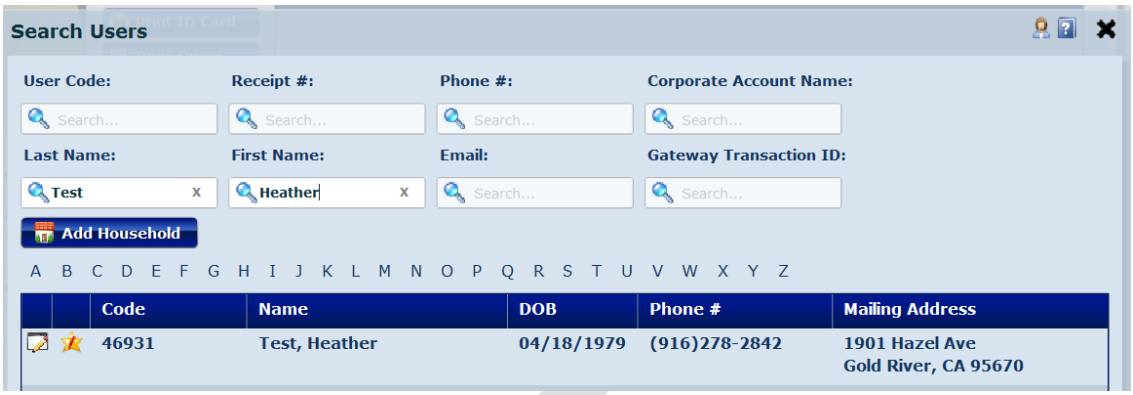
a.

If you click this button a new window will pop up like the one pictured below. Click "Yes" to continue.



b.

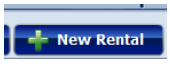
If you click this button a new window will pop up and you now need to search for a household to add this user to. Once you click on the name of the new household it will automatically move the current user over.



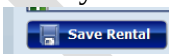
RENTALS

CHECK OUT RENTALS

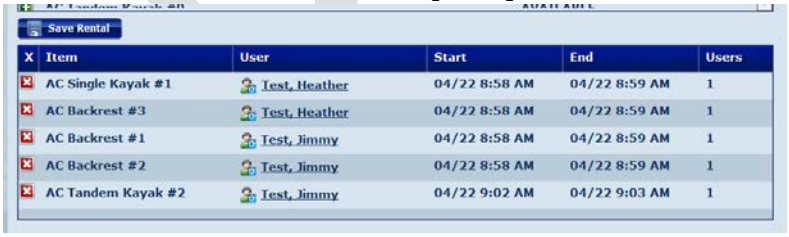
1. Pull up the account in Park Pro, if it is a group of people just pick any one person to start.
2. Click

.
3. Then click 

.
4. A window with all the available rental equipment will pop up. Select the equipment they wish to rent.

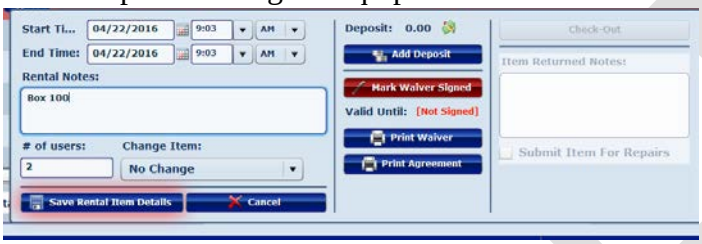
After you have selected all the equipment the individual/group wants to rent click 

. If there are multiple individuals renting equipment but they are in the same group you can add all equipment at once. To change who the particular equipment is rented to click on their name and pull up their account.



5. The rental will now show up on their account.

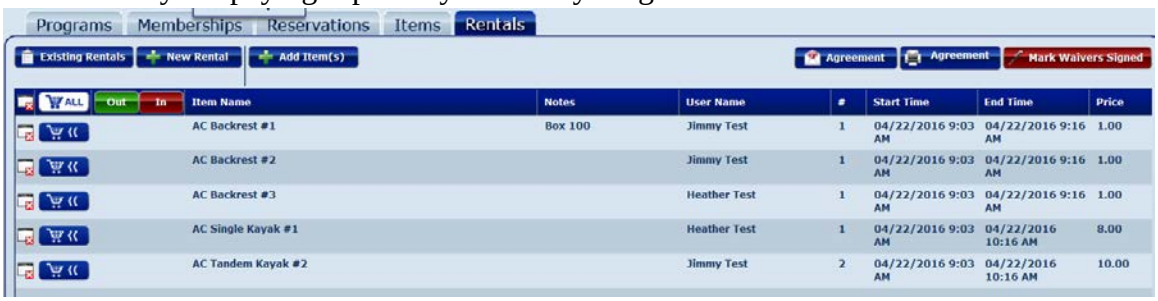
Click once on a piece of equipment to open the window below. In the *notes* section make sure to write in the box number that their keys and IDs are being held. If there is more than one person using the equipment make sure to change the # of users.



CHECK IN RENTALS

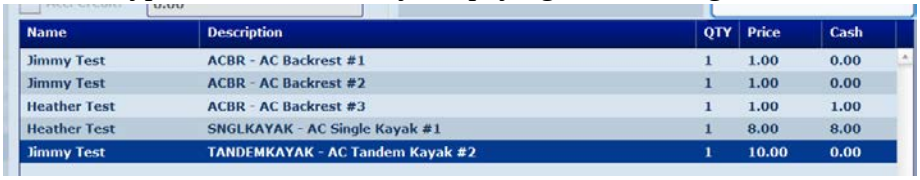
1. Pull up the account of the individual/group.
    a. If you are having trouble finding their account… 1) Try looking up <u>each</u> individual in a group, 2)Try using the name written on their ID (sometimes they go by a nickname but their account is under their full name), 3) Try typing in part of their first/last name (maybe we misspelled their name on the account)
2. Click the *in* button to check in all the equipment. If only part of the group is back you will need to use the *check-in* button next to only the pieces of equipment that have returned.

3. Click the *All* button to add all equipment to the shopping cart.
*Even if they are paying separately add everything to the cart!



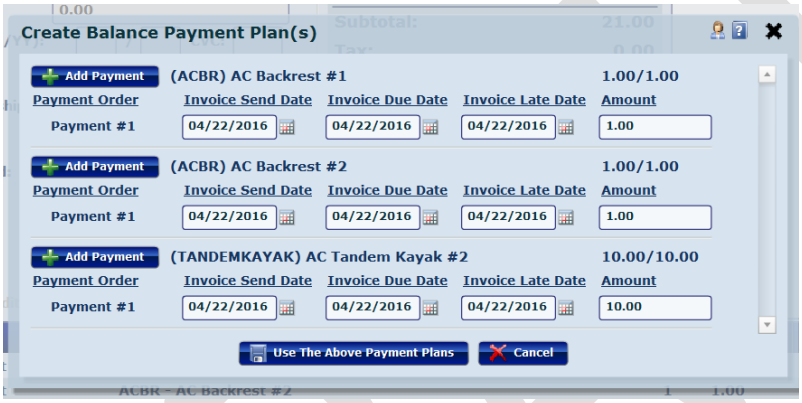
4. If they are paying for everything together click

to process.
If they are paying separately check they type of payment the first person is using to pay and then type in how much they are paying in the far right hand column.



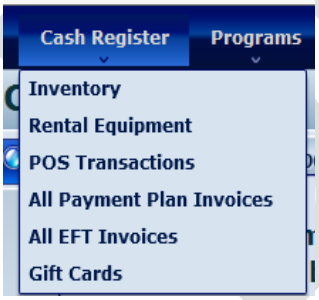
Name	Description	QTY	Price	Cash
Jimmy Test	ACBR - AC Backrest #1	1	1.00	0.00
Jimmy Test	ACBR - AC Backrest #2	1	1.00	0.00
Heather Test	ACBR - AC Backrest #3	1	1.00	1.00
Heather Test	SNGLKAYAK - AC Single Kayak #1	1	8.00	8.00
Jimmy Test	TANDEMKAYAK - AC Tandem Kayak #2	1	10.00	0.00

When you go to complete sale Park Pro will ask you to create a balance payment plan(s) for the equipment that was not paid for. Double check that the invoice dates are set for today and that the amount owed is correct. Then click *Use the Above Payment Plans*.
To pay the remaining balance on a partial payment search the individual's account and go to *Dues Owed*.



VIEW CURRENTLY RENTED

1. Hover your mouse over the Cash Register tab at the top of the screen. Click on *Rental Equipment* in the drop down menu.



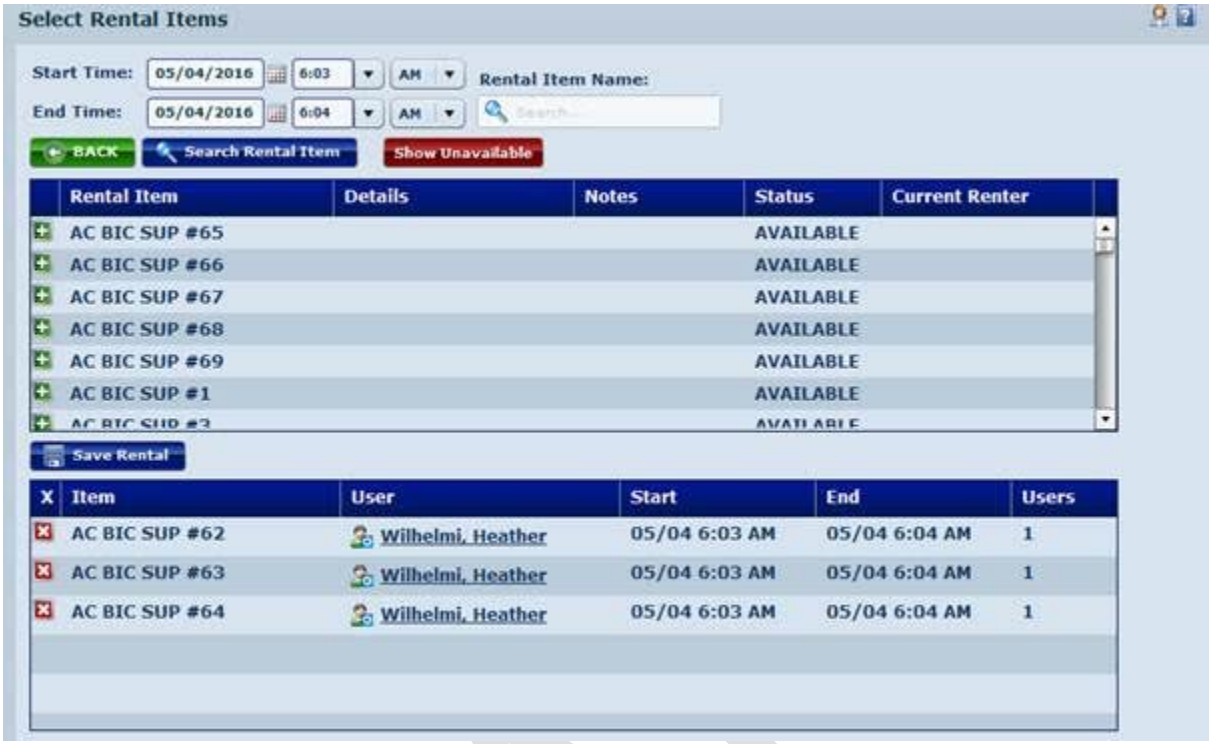
2. To view the list of all equipment currently rented out and to whom it is rented to, select AC Administrative as the Facility. Then click

.

CHANGE NAME OF USER

It is **EXTREMELY** important that you check each piece of equipment out to the correct person. For example when you have a group of 6 adults come in, each one of them MUST have an account and the equipment the person is going on must be checked out to the correct person. So let's say that me, Ashley, Cindi, Brian, Paul and Matt are going to come out to rent. All six of us must have an account. Ashley, Cindi and I want Bic boards, so you pick the equipment first and it will all go under the main contact at first.

DRAFT

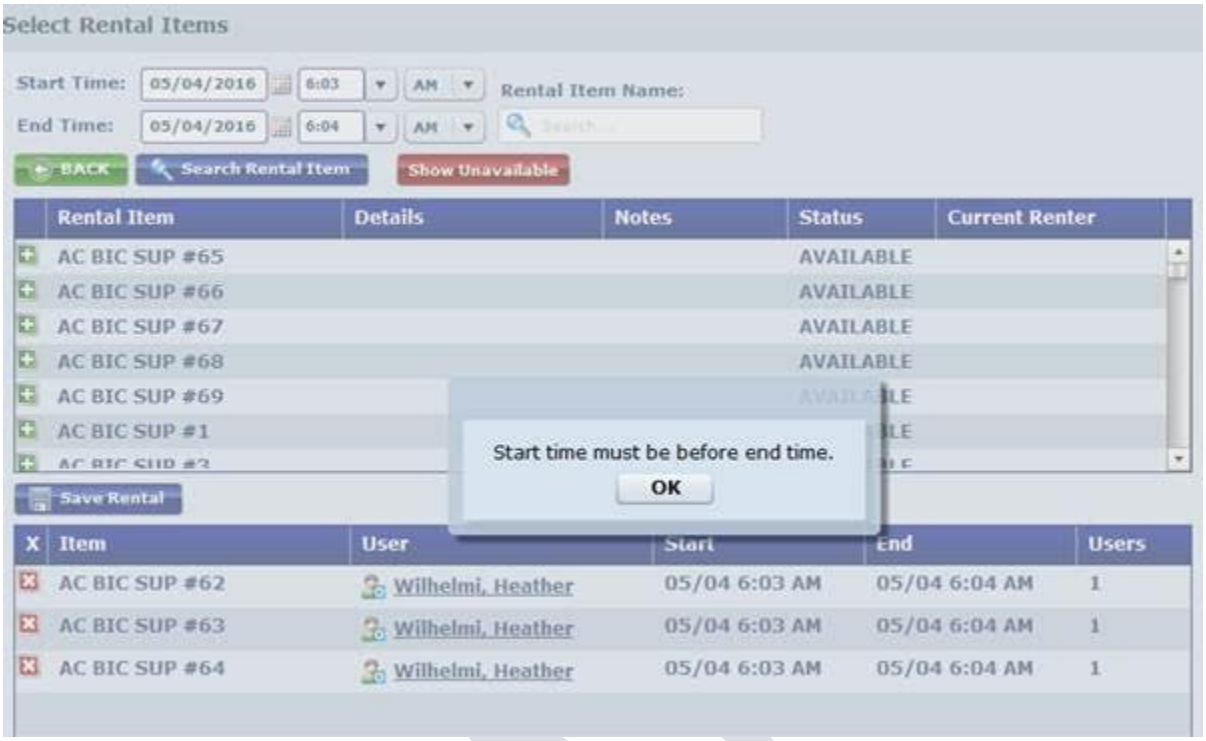


You MUST then change the user on this screen BEFORE you hit save: To change the user you click on the customer's name

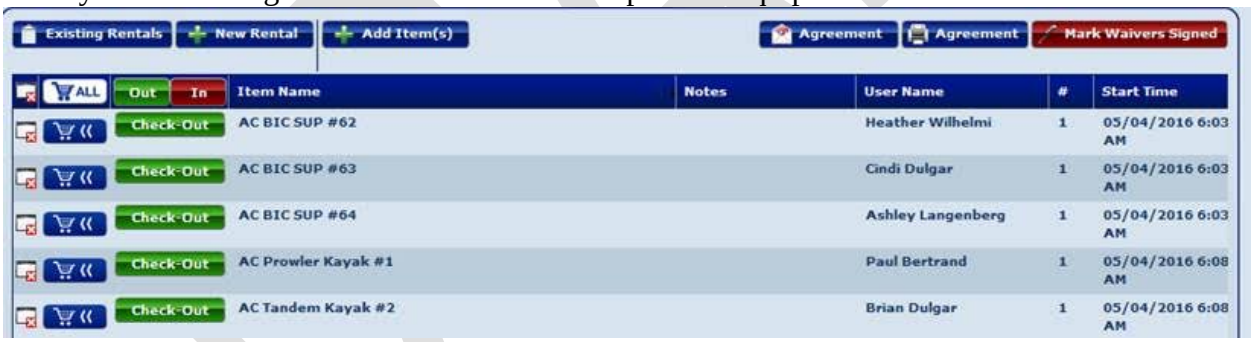
This will bring up the search window, search for the customer you want to assign that piece of equipment.

When you do this you may get an error:

DRAFT

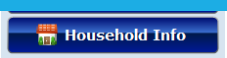


Just hit OK, because it will actually change the names:
Now Brian & Matt want to take out a tandem and Paul wants a Prowler. Pick the equipment and then change the user by name.
After you have change all the user to the correct piece of equipment hit Save Rental



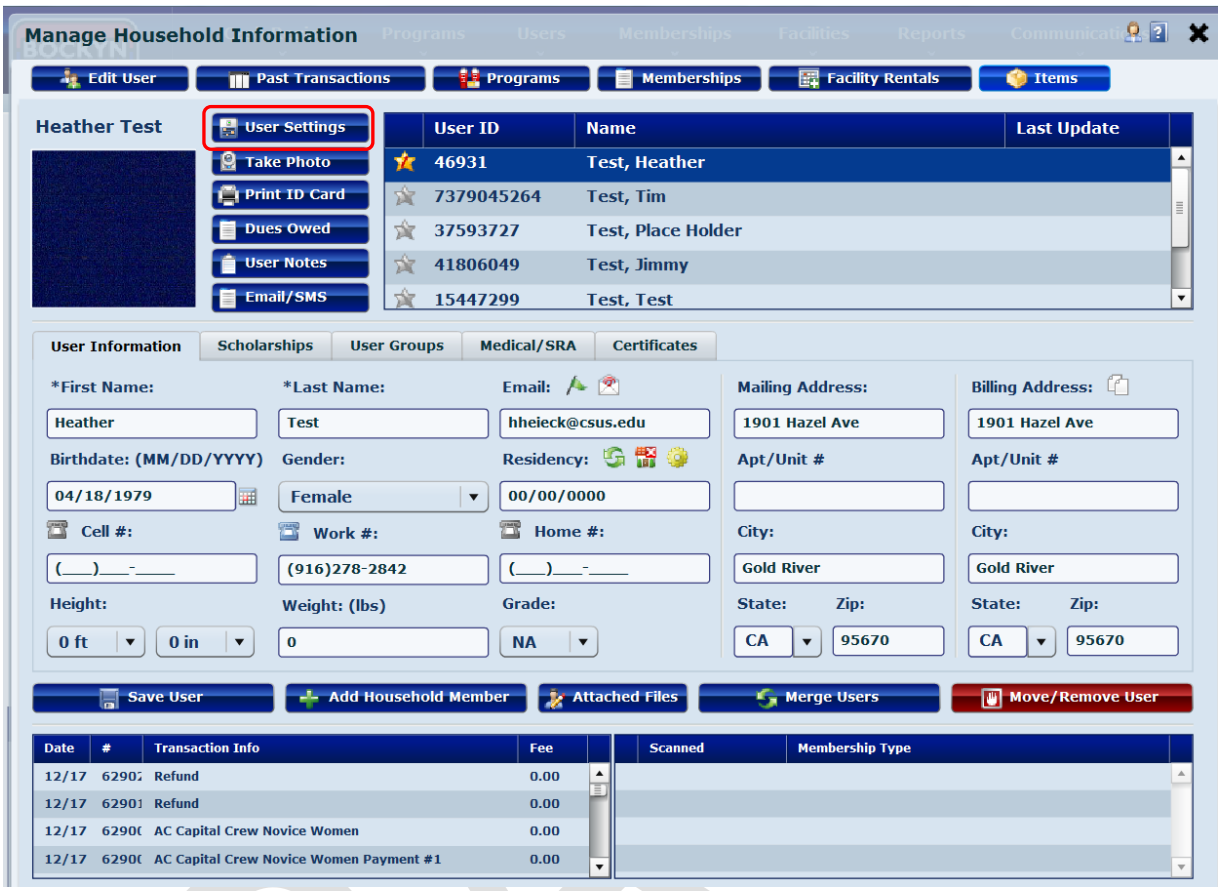
See how everyone's name is attached to the correct piece of equipment now.
<u>This is important for TWO reasons:</u>
#1 It is SO much easier when you are checking people back in to double check what is back in and if they want to pay separately.
#2 When you do process payment it will show on the payment plan who hasn't paid. If someone did skipped out on their bill it will show us the exact person who didn't pay. This is the MOST important reason, so when I have to try and collect fees later I know who to contact.

CHANGING CUSTOMER PASSWORDS

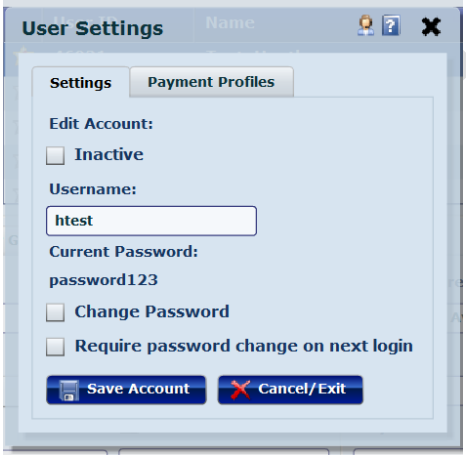
1. Pull up the customer's account. Click on 

. Then click on

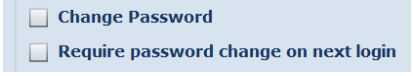
.



2. A new window will pop up like the one below. If the customer already has an online account you can see their name and password. Do not tell them that you can see their password. This may make people uncomfortable. Instead let them know that you will reset their password.
**If the customer does not already have an account you may make a username for them. The go-to username is the first letter of their first name followed by their last name. Follow the next steps to create a password for them.



3. Make sure to check boxes next to “change password” and “require password change”



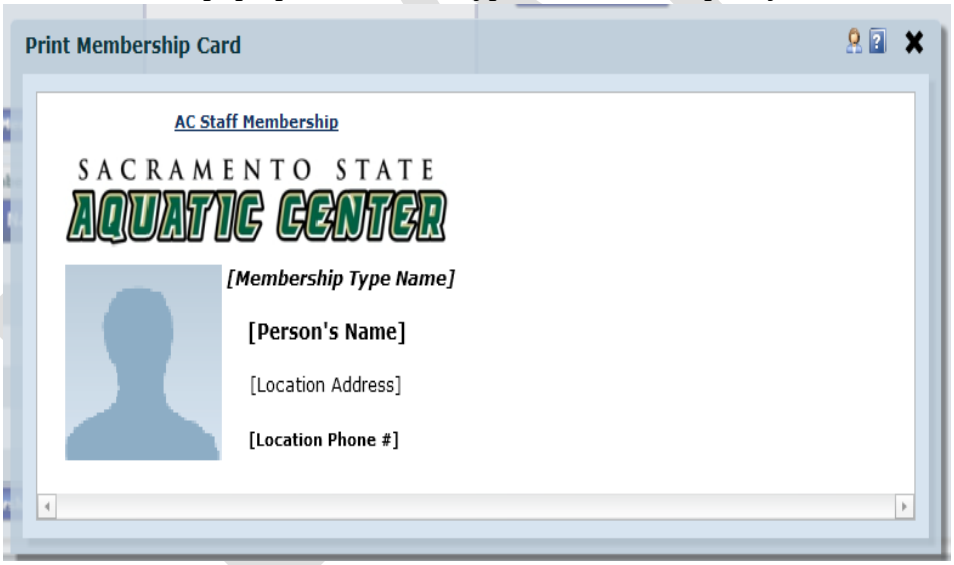
You may now manually change their password. You can change it to anything but the go-to reset password is: Password01

4. Tell the customer what their new password is and then click Save Account. The customer may now go online and use this temporary password to log in. They must change their password upon the next login.
5. Click Programs

HOW TO PRINT ID CARDS

1. Click Memberships
2. Search for the customer's account. Click the icon next to their name.

3. Click Print Card underneath their photo
4. A window will pop up, click on the type of membership they have

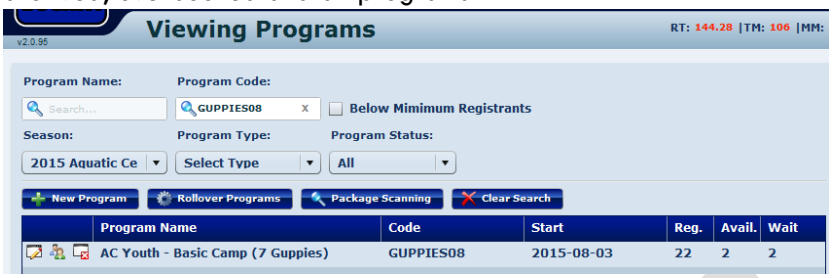


5. Print to the *Magicard Rio Pro* printer.
6. After the card prints check to make sure it is encoded by swiping the card in *Notepad*.
7. Fill out the *Membership Card Activation Script* and email to office manager to activate the card. Use the card number copied from *Notepad*. The customer can keep their card- we do not need it to activate.

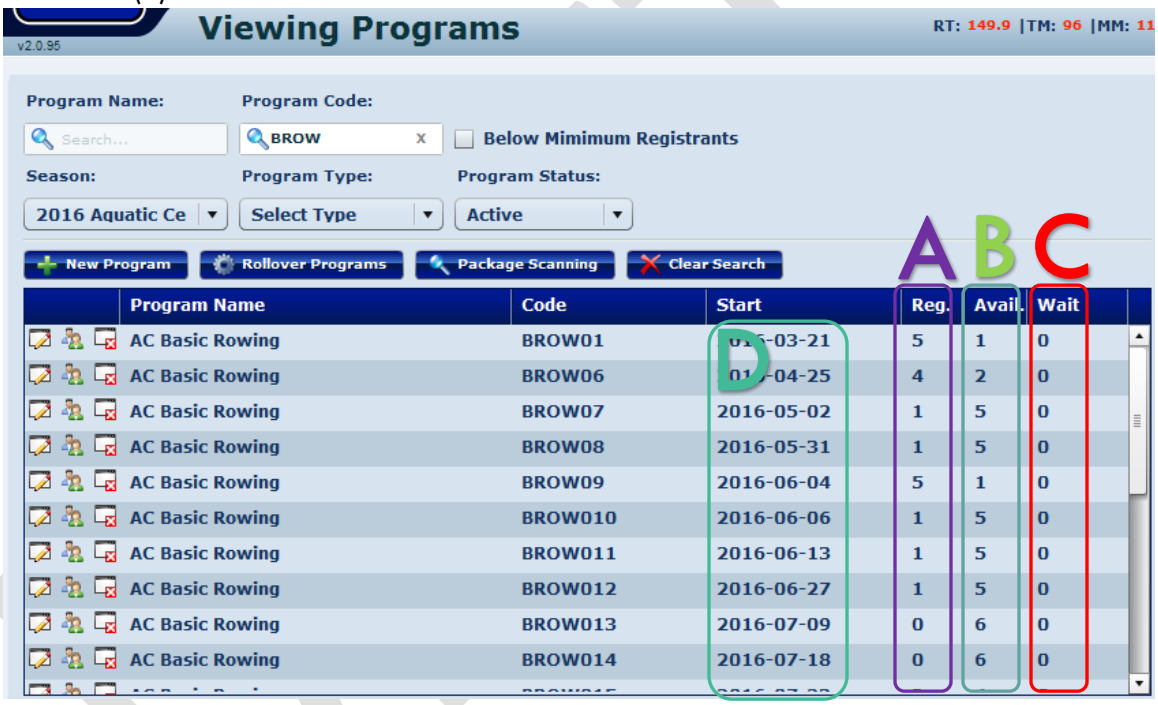
HOW TO LOOK UP PROGRAMS (CLASSES)

6. Type in the program code.

Note: Make sure to select the correct season. You may change the program type to narrow your search. If you change the program status you can switch between viewing active, full, cancelled, archived, overbooked and all programs.



7. If the customer is not sure what section they would like just type the prefix (Ex: GUPPIES, BSAIL) From here you can see how many people are currently registered for a class (a), how many spots are available (b), and how many people are on the waitlist (c). You can also view the date the class starts (d)



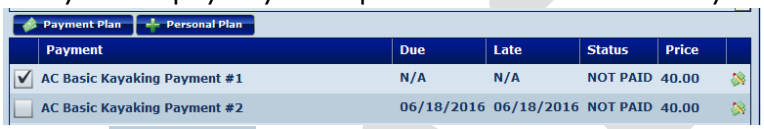
REGISTRATION

HOW TO REGISTER FOR A CLASS

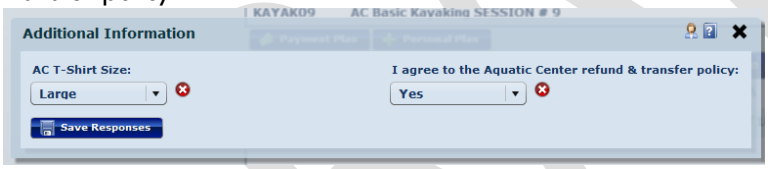
1. Pull up the account of the parent/guardian/individual you are speaking to.
2. Click

3. Your screen should now look like this…
   Make sure you select the child who is attending as participant and the appropriate camp as the program. Once you have pulled up the program you may easily switch weeks by clicking on them in the right hand side of the screen.

4. If they wish to <u>pay in full</u> simply click the Add button to move the item to the shopping cart and proceed to step 8.
   If they wish to <u>pay only the deposit</u> proceed to the next step.
5. If they wish to pay only the deposit check the box next to Payment #1



   Click the Add button to move the item to the shopping cart.
6. You will now be asked to select a t-shirt size and make that you have read them the refund and transfer policy.



7. Repeat as many times as needed to sign up multiple people/classes. Once you have completed registering all participants click Complete Sale and process payment.

HOW TO REGISTER FOR A SUMMER CAMP

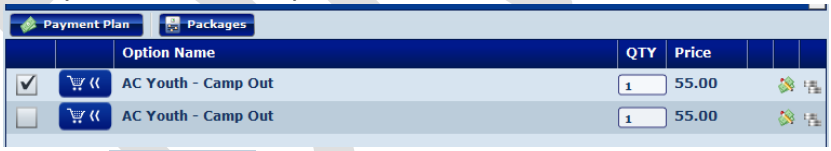
1. Pull up the account of the parent/guardian you are speaking to.
2. Click Programs
3. Your screen should now look like this…
   Make sure you select the child who is attending as participant and the appropriate camp as the program. Once you have pulled up the program you may easily switch weeks by clicking on them in the right hand side of the screen.

DRAFT

4. If they wish to <u>pay in full</u> simply click the

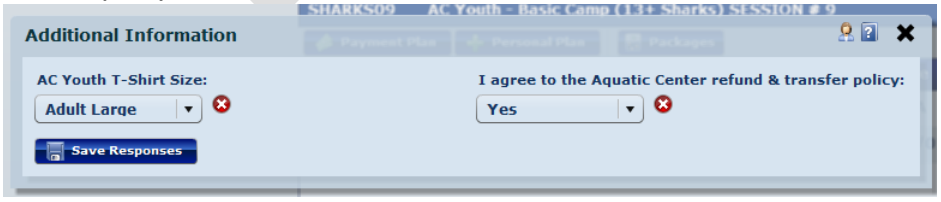
button to move the item to the shopping cart and proceed to step 8.
If they wish to <u>pay only the deposit</u> <u>or want to add Campout</u> to camp proceed to the next step.
5. If they wish to pay only the deposit check the box next to Payment #1

6. If they want to add Campout click on



Click the

button to move the item to the shopping cart.
7. You will now be asked to select a t-shirt size and make that you have read them the refund and transfer policy.

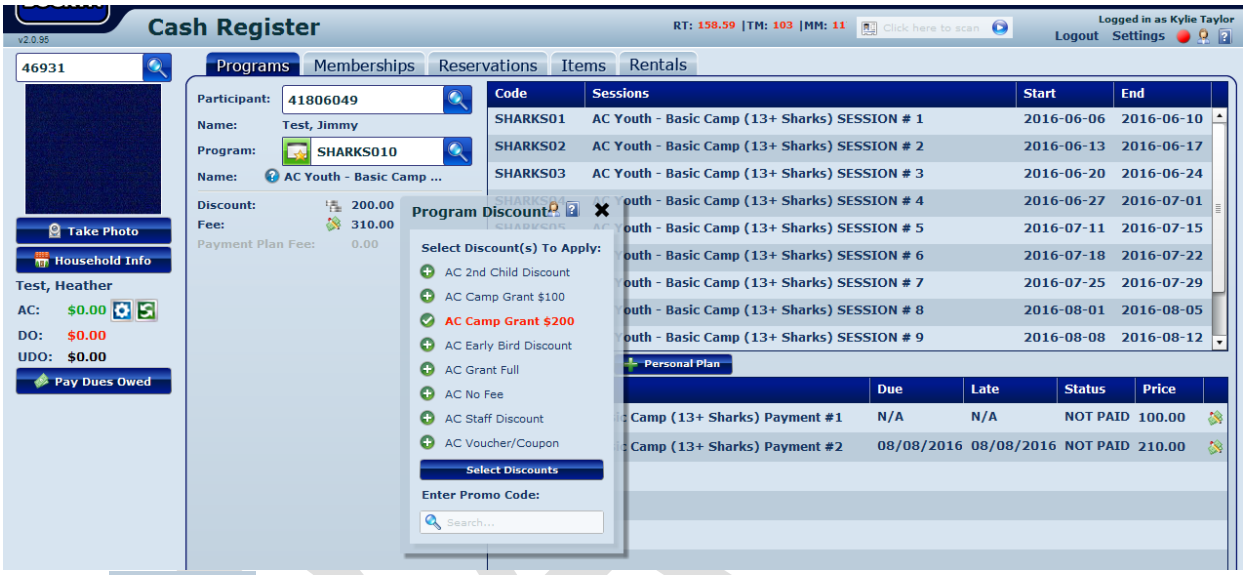


8. Repeat as many times as needed to sign up multiple kids/weeks. Once you have completed registering all participants click

and process payment.

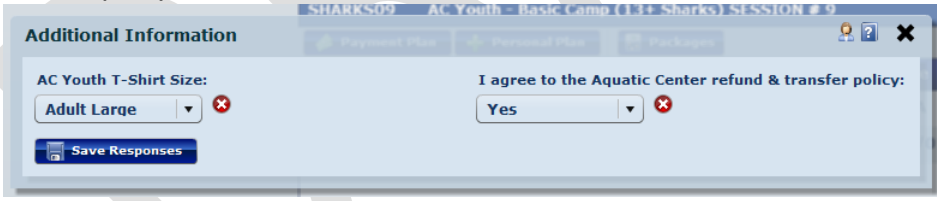
9. Pull up the account of the parent/guardian you are speaking to.
10. Click

11. Your screen should now look like this…
    Make sure you select the child who is attending as participant and the appropriate camp as the program. Once you have pulled up the program you may easily switch weeks by clicking on them in the right hand side of the screen.
12. To apply the grant click on the icon and select to correct grant amount. Then click *Select Discounts*.



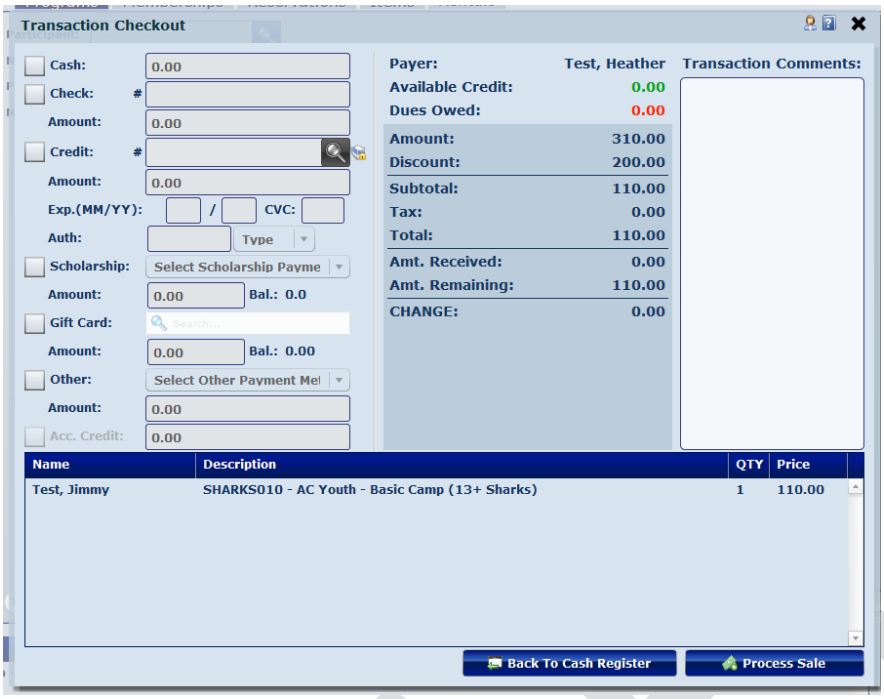
13. Click the button to move the item to the shopping cart.

14. You will now be asked to select a t-shirt size and make that you have read them the refund and transfer policy.



15. Repeat as many times as needed to sign up multiple kids/weeks. Once you have completed registering all participants click and process payment.

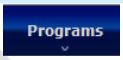
16. If the individual is not there to pay you may register them for the camp and put the remaining balance on their account. When you go to Complete Sale your screen will look like the one below. Note: The discount amount should be the amount of money the received for the grant.



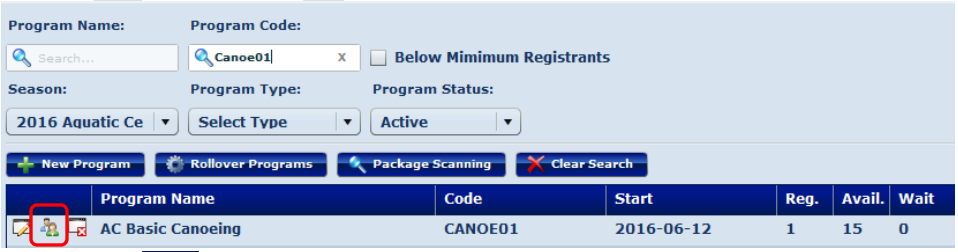
17. You may click

. A window will pop up like the one below. Make sure the invoice dates are correct (are set to be due 7 days prior to camp start) and click

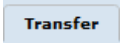
TRANSFERING PROGRAMS

1. Click 

2. Search for the program that the individual is currently registered in.
   Click on the people to pull up the program.

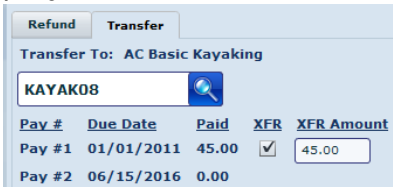


3. Click on the button.

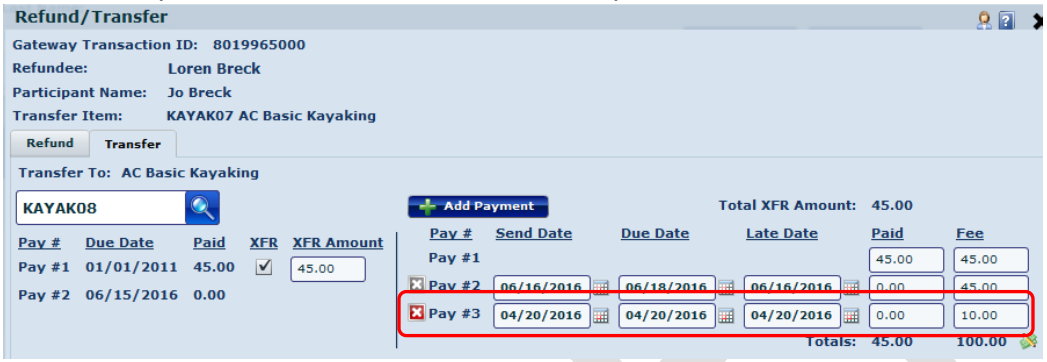
4. Click 

   Find the program they wish to transfer to.

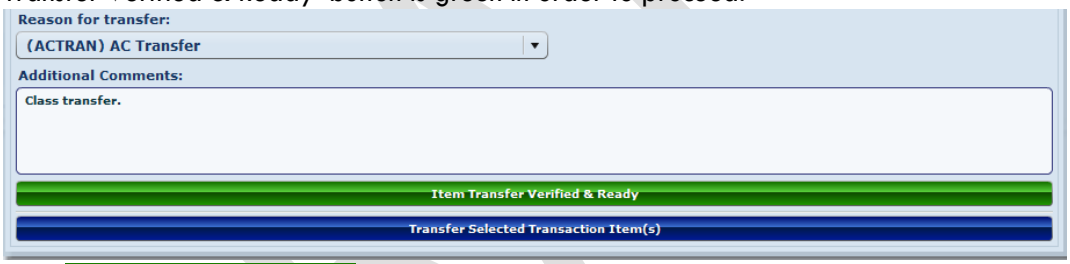
Make sure to check the XFR box to transfer the ammount they have already paid towards this new program.

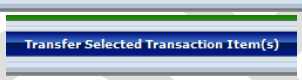


The Paid column Total should match the ammount the customer has already paid. The Fee column should total up to the ammount the class should cost, plus the $10.00 transfer fee.

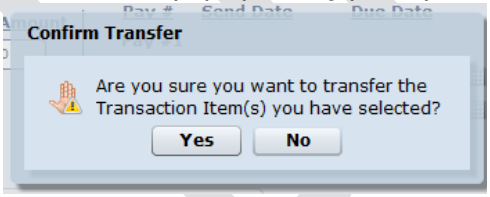


5. Now select a reason for transfer and write in any additional comments. Make sure the 'Item Transfer Verified & Ready' button is green in order to proceed.



6. Click 

A window will pop up asking you if you are sure you want to continue. Click *Yes*.



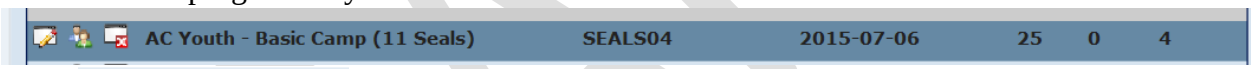
7. Another window will pop up. This is where you need to double check that all information is correct. (Did the correct amount paid get transferred over?, Has the $10.00 transfer fee been applied?) After you have double checked everything you may click complete transfer and you are done.

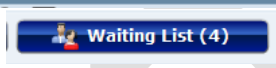
WAITLISTS

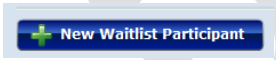
Adding to Waitlist

If a program is full the customer may be added to the waitlist for a class/camp.

1. Make sure the customer has an account in Park Pro.
2. Click

3. Search for the program they want to be waitlisted for. Click the icon.


4. Click 

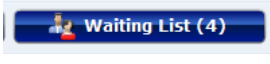
5. Click 

and search for the customer's account.
A window will pop up like the one below. Make sure the customer knows how much they will owe should be added the program. Then click *Add Participant.*

Adding to Program from Waitlist

1. Click

2. Search for the program they are waitlisted for. Click the icon.

3. Click 

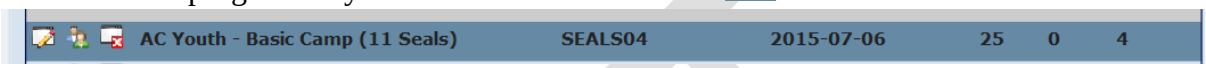
4. Click the green+ icon next to their name to add them to the program.
Park Pro will ask you if you are sure, click *Yes.*

DRAFT

5. They will now be added to the program and must pay their dues owed accordingly.

Removing from Waitlist

1. Click Programs
2. Search for the program they are waitlisted for. Click the icon.



3. Click on the red X icon next to their name to remove them from the program. Park Pro will ask you if you are sure, click *Yes.*

MEMBERSHIPS

MEMBERSHIP REGISTRATION

1. Follow the *New/Renew Member Checklist* located in the drawers at the front desk.
    a. This section will only go over how to register them in Park Pro… don't forget about all the other paperwork (Waiver, Parking Pass, Membership Packet, etc.)
2. Pull up the customer's account.
3. Click on Memberships
   Select the individual signing up for the membership as participant; and select your drawer at the Facility. On the right hand side you will be able to scroll through and select the appropriate membership. To add additional members to click on the *Household Members (+)* button and select everyone who is going to be on the membership (Remember: A family membership included 2 adults and 2 minors in the same household. An additional minor can be added at an additional cost, Park Pro will add the additional cost automatically)

4. Click

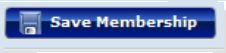
5. Click

6. Don't forget to give the customer their receipt, parking pass, and membership description.
7. File paperwork.

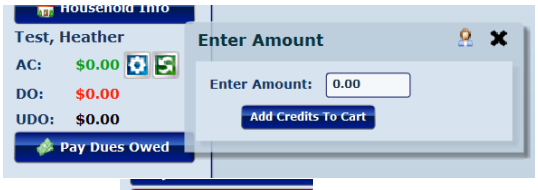
CHANGE MEMBERSHIP DATES (LAPSE IN MEMBERSHIP)

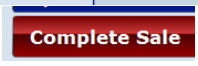
1. Click

2. Search the person's name. Click to the left of their name.
3. You can now edit the Start and End dates of a particular membership.
Note: This is done if memberships overlap in dates or lapse in membership (ex: Master's rower who is required to always have current membership if on the team.)

4. Click 

ACCOUNT CREDIT

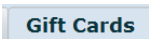
1. Pull up the customer's account.
2. Click on the button underneath the household information button. A new window will pop up like the one below. Enter the amount the customer wants to add as an account credit here. Then click *Add Credits To Cart*.
3. 

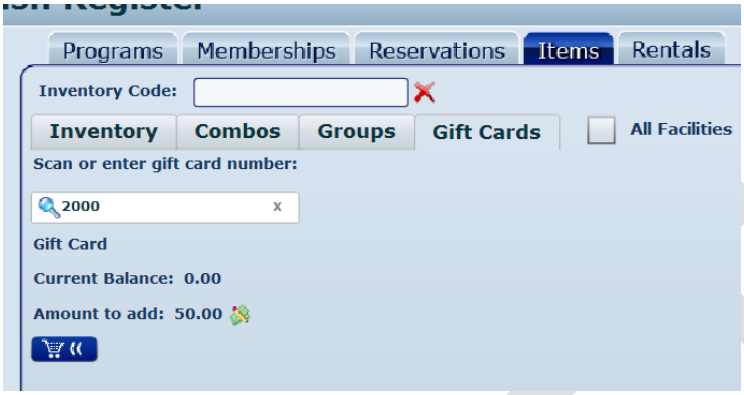
4. Then click 

and process.

GIFT CARDS

1. Go to

2. Click 



3. On the back of the card there will be a number underneath the barcode. Type this number in the search bar. Click and enter the amount the gift card is for. Then click the shopping cart icon to add the gift card to the shopping cart.

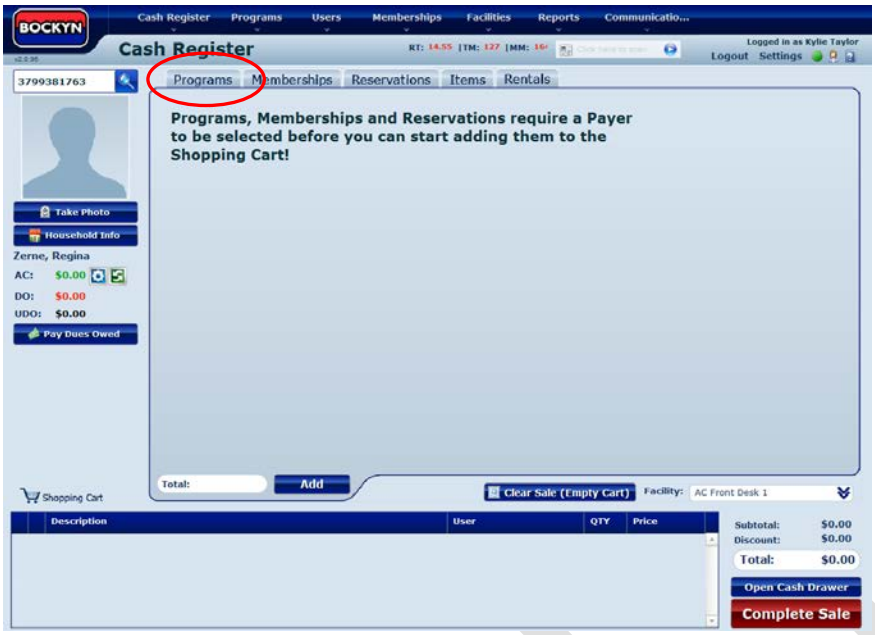
4. Then click

CAPITAL CREW

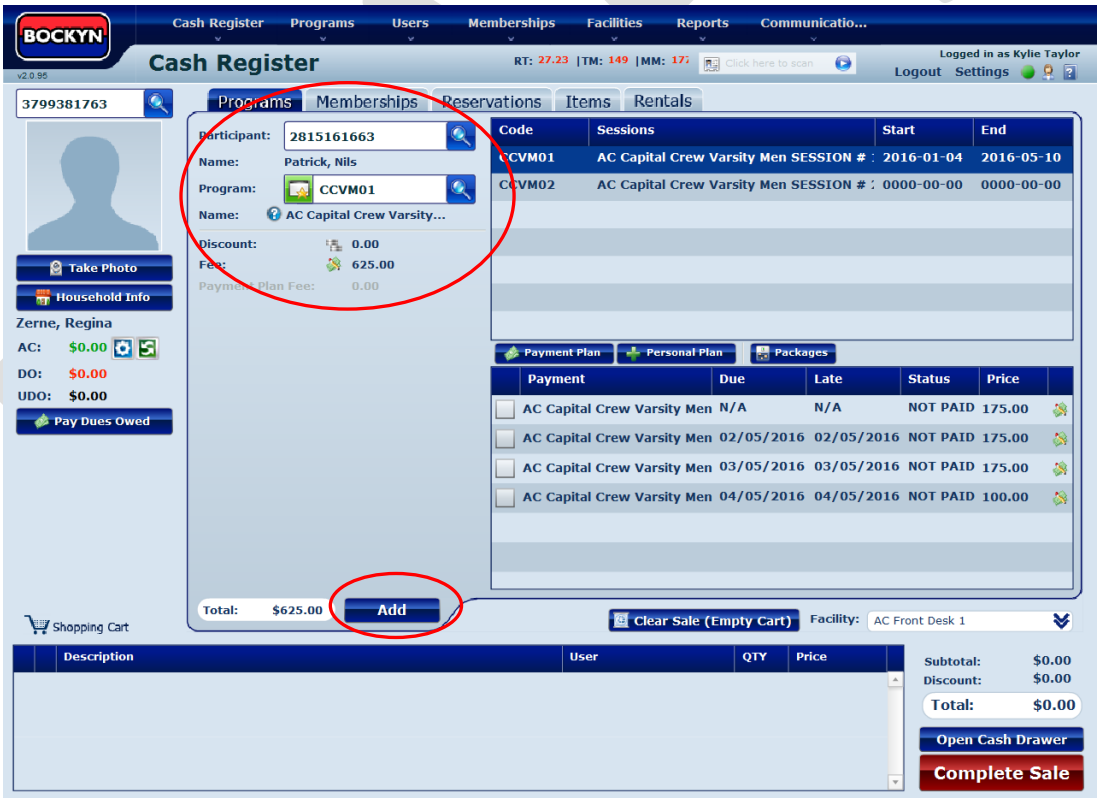
PAYING IN FULL

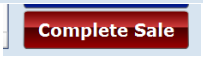
- Pull up the **payee's** account. Click on the

tab.



- Select the athlete as the participant and select the appropriate squad for program name.
- Click the button.



- Click the  button. Process like a regular sale.

- Register for boosters the same way. Code: Booster02
    - Make sure to select correct squad in pop-up window before taking payment!

$25.00 TRY-OUT FEE: (NOVICES ONLY)

Note: only novice can do the $25.00, two week trial.

- Pull up payee's account.
- Click on Programs.
- Select the athlete as the participant and select the appropriate squad for program name. Because this will be a try-out select the try-out program (ex: CCNWTRY)
- Click "Add" to put item(s) into card.
- Click "Complete Sale" and process as normal.

$25.00 TRY-OUT FEE – APPLY TO REST OF SEMESTER

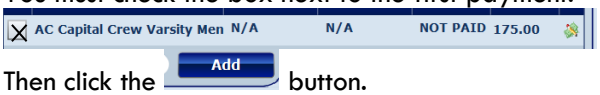
- Pull up payee's account.
- Click on Programs.
- Select athlete as the participant. Select the appropriate squad for program name (CCNM or CCNW)
- Click "Add" to put item(s) into card.
- Click "Complete Sale" and process as normal.

PAYMENT PLANS WITH OR WITHOUT BOOSTERS

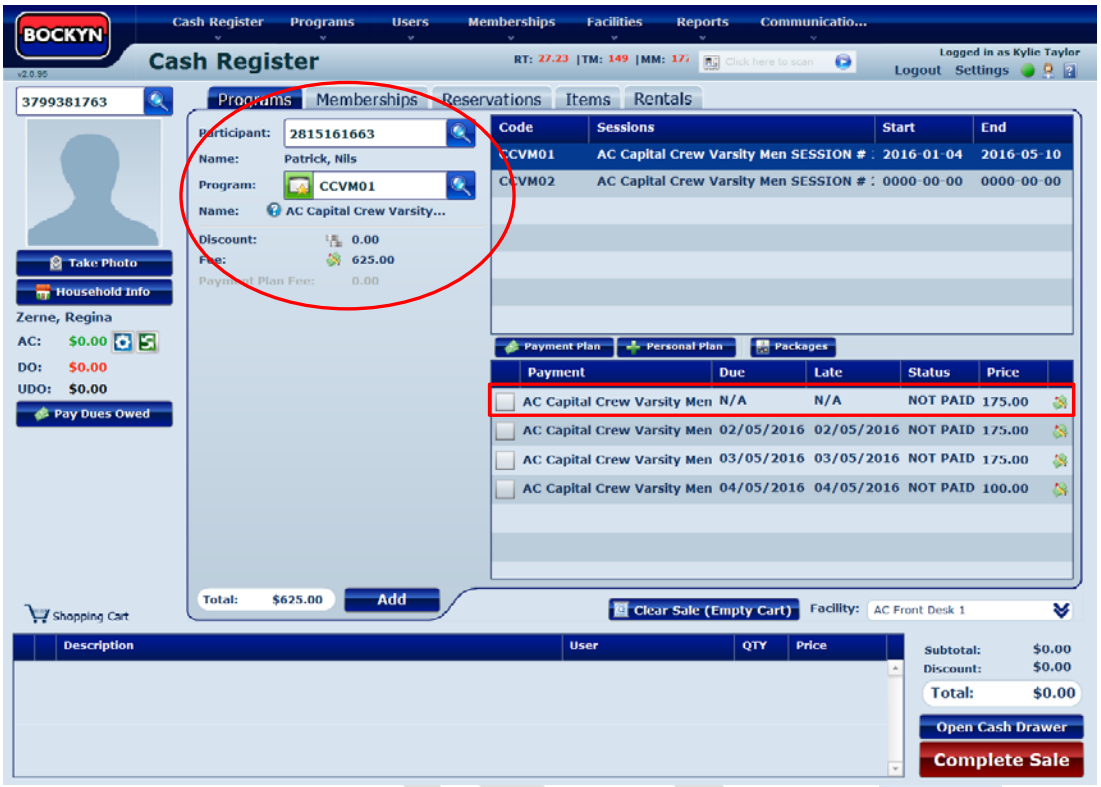
Make sure athlete has all paperwork filled out and on file: CC Payment Plan, Waiver Card and Payment Plan Form.

1. Review that the Payment Plan is fill out entirely. Pull up the payee's account; make sure all contact information is up to date. Click on the Programs tab.

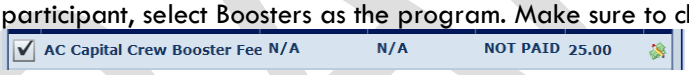
2. Select the athlete as the participant and select the appropriate squad for program name. You must check the box next to the first payment.



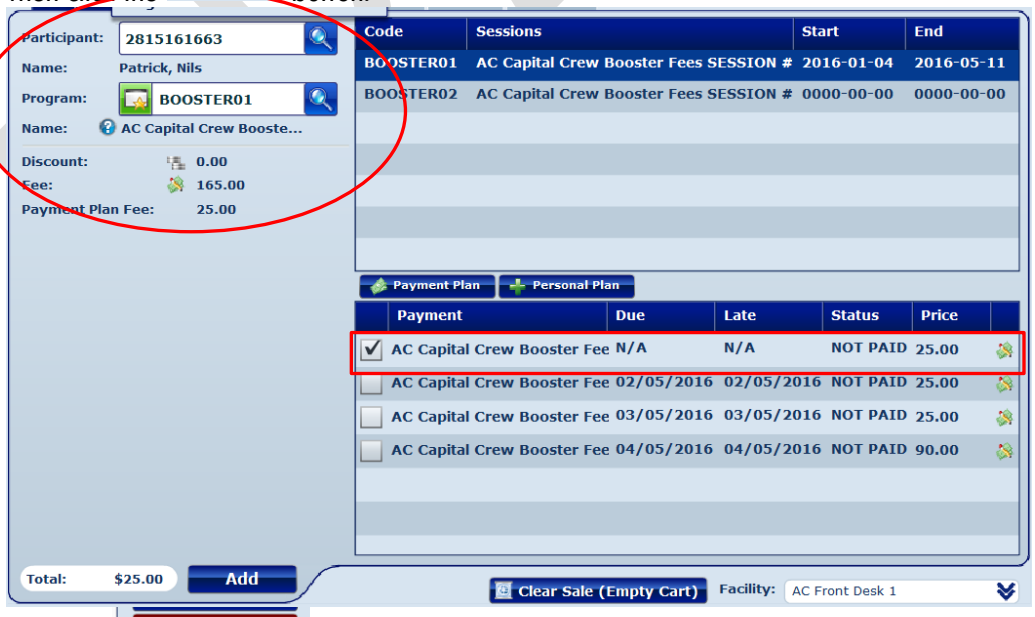
Then click the Add button.
If they do not want to pay for boosters proceed to step #4.



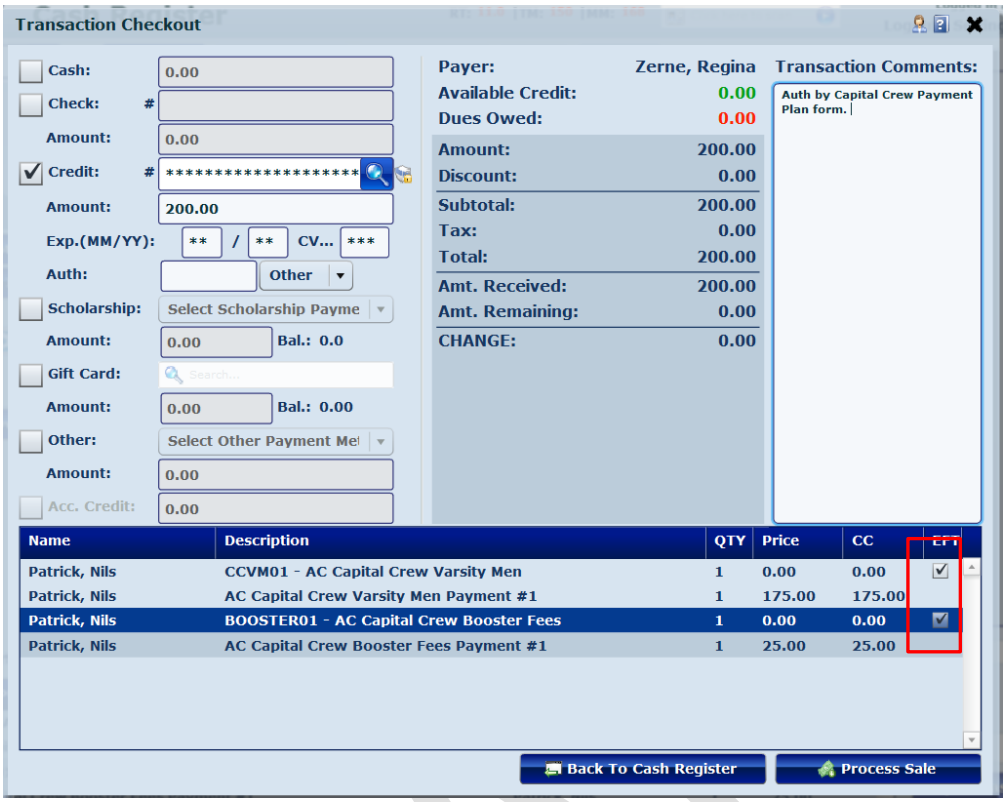
3. If the athlete is paying for boosters with a payment plan you must click the Programs tab, select the athlete as the participant, select Boosters as the program. Make sure to check the box next to the first payment.



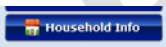
Then click the Add button.



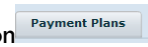
4. Click the Complete Sale button.
5. **Make sure to click the EFT box on all payment plan items!**
   In transaction comments note that payment was authorized via payment plan form.



Double Check!! This must also be done for boosters if the athlete paid for boosters with a payment plan.

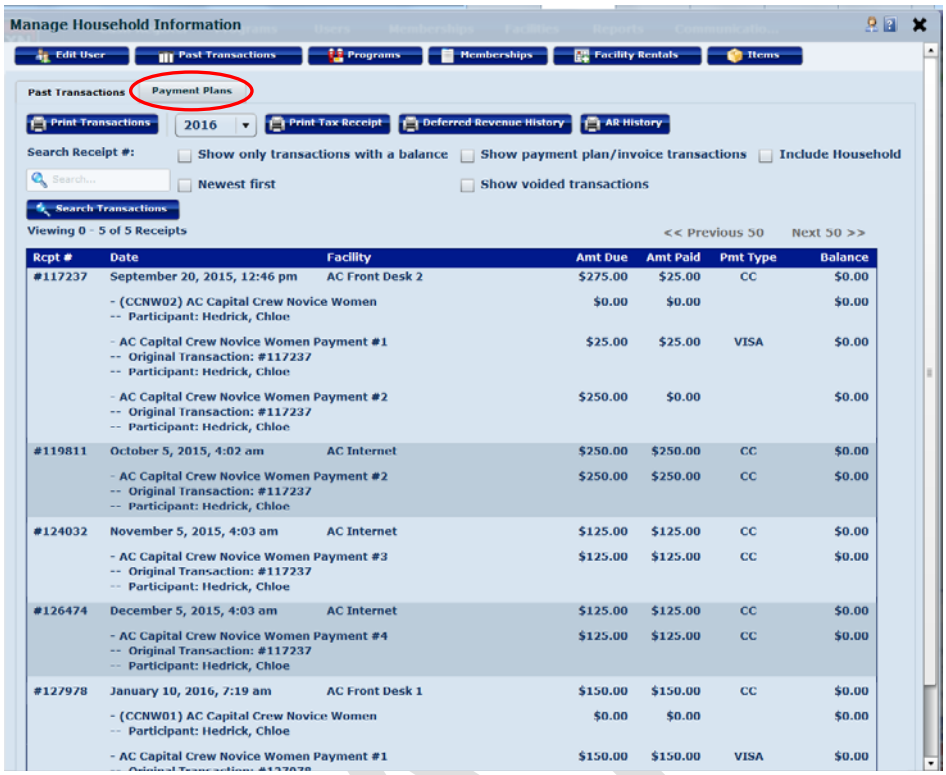
6. Pull up athlete's account. Click on 

. Then click

.
7. Your screen should look something like the image below. Click on 

.

DRAFT



8. Your screen should now be displaying all current and past payment plans. Locate the correct payment plan by looking at the dates in the left. They should correspond to the dates listed on the payment plan. The first payment's dates should all be "0" because you have already processed that payment.

1	00/00/0000	00/00/0000	00/00/0000
2	02/01/2016	02/05/2016	02/05/2016
3	03/01/2016	03/05/2016	03/05/2016
4	04/01/2016	04/05/2016	04/05/2016

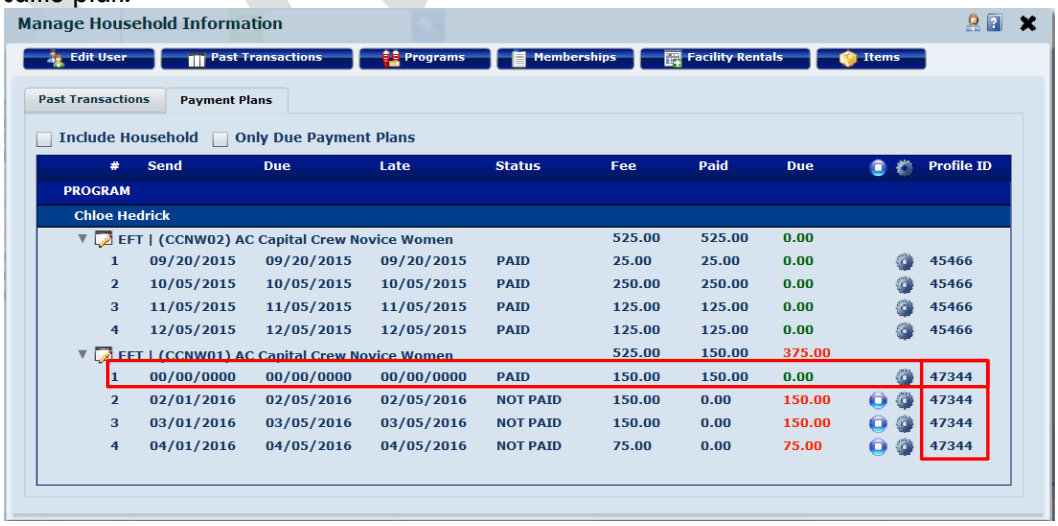
9. Make sure you check that the first payment was processed, as indicated by the green zeros in the first line of the payment plan.

0.00

1	00/00/0000	00/00/0000	00/00/0000	PAID	150.00	150.00	0.00	47344

Make sure there are numbers listed next to the gears on the right hand side- this means the credit card is linked to the payment plan. All these numbers should be the same within the same plan.

47344
47344
47344
47344



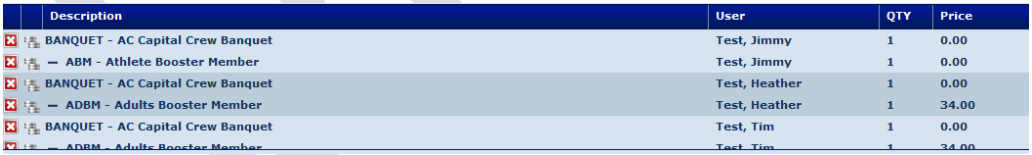
File paperwork!

1. Email a receipt to the payee once you have double checked all payment plans.
2. Staple a receipt to the authorization page.
3. Cut out *only* the first 12 numbers of the credit card on the authorization page; leave the last 4 numbers intact.
4. Take the cut out numbers and place them in a small envelope labeled "Credit Card #s to shred, *today's date*" and place in the drawer to be included in the drop that night.
5. Put the receipt and authorization page under the drawer to be included in the drop that night.
6. Take the other papers and file them in the "CC Payment Plan Binder" by last name of the athlete.

BOOSTERS

1. Pull up the account of the customer you are talking to.
2. Check to see if the child has been registered for boosters for this semester by clicking on Household Information>Programs>Highlight the child's name.
    a. They may have paid directly to booster's so it will not show they are registered in Park Pro, check the list that boosters has given us or ask for a receipt to show they have paid boosters.
3. Go to Programs.
4. For participant select the person the ticket is for. You can only register one ticket at a time. For program select Banquet. If the participant (or their child) has paid into boosters then select the ticket that corresponds with boosters, otherwise they need to pay non-boosters price.

5. Repeat step #4 for each user who is purchasing a ticket.
6. If you register multiple people for tickets your shopping cart should look like this…



Notice how each ticket is linked to a specific user. This is important because at check in a printed list of everyone registered will be there, so their name needs to be linked to a ticket in order to be let in. There are no physical tickets.

ERG SALES

We sell off our older models to make room for the new ones. There may be various models for sale, they are $750.00 plus tax for a total of $813.75. Deposits for the ergs, are $100.00 per erg. The ergs cannot be picked up until after the Golden State Indoor Rowing Championships on. Full payment will be due at pick up.

Taking deposits:

·Make an account in Park Pro (please make sure to get all customer information or verify that information is correct if they already have an account.)
·Grab the excel spreadsheet on the desk under the plastic and record the information.
·Deposits can only be made as account credits, since Park Pro does not allow us to make partial payments on taxable items

1. Pull up their account, then click on the button next to AC. A window will open where you can enter the amount.
2. Enter $100.00, then click "Add Credits to Cart"

3. Inform the customer that this is a non-refundable deposit. If they decide not to purchase the erg they will not receive the $100 deposit back.
4. The amount will then show in the shopping cart and you can proceed to complete sale.
5. On the transaction comments please write that this is an Erg sale deposit.
6. Make sure to add information to the spreadsheet!

If customer has chosen Erg in person or they know which # Erg they want to buy:

a. Pull up their account in Park Pro
b. Have the customer go to the Erg loft and pick out which Erg they would like to purchase. Ask them to pull of the "For Sale" sign on the Erg and bring it to you. This will have the Asset ID # on it.
c. If they only want to pay the deposit follow steps(#1) above to add account credit. Complete sale of account credit. Then proceed to the step #d
d. Click on the items tab
e. All ergs are under the item name "AC Erg #15-XX" and there is one AC Erg #14-20
f. The code number indicates the Asset ID tag # that is on the Erg. So make sure it matches the For Sale number.

DRAFT

Code	Item Name	Stock	QTY	Price
CCuni	AC CC Unisuits	0	1	73.00
10264	AC Erg #12-2	0	1	775.00
10265	AC Erg #12-3	0	1	775.00
10266	AC Erg #12-4	0	1	775.00
10267	AC Erg #12-5	0	1	775.00
10268	AC Erg #12-6	0	1	775.00
10269	AC Erg #12-7	0	1	775.00
10270	AC Erg #12-8	0	1	775.00
10271	AC Erg #12-9	0	1	775.00
10816	AC Erg 14-1	1	1	750.00
10830	AC Erg 14-10	1	1	750.00
10831	AC Erg 14-12	1	1	750.00
10814	AC Erg 14-13	1	1	750.00
10829	AC Erg 14-14	1	1	750.00
10822	AC Erg 14-15	1	1	750.00

g. Add the Erg to the customer's cart.
h. Run transaction using the $100 credit and then take payment for remaining balance

Please make sure to explain that ergs cannot be picked up until after the Golden State Indoor Rowing Championships.
We will not hold any erg without a $100.00 deposit.

OPEINING/CLOSING PROCEDURES

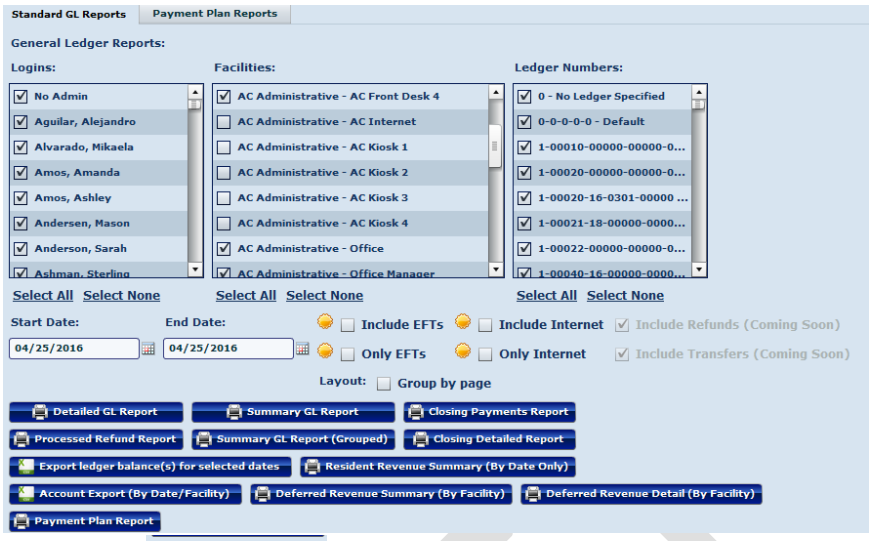
CLOSING REPORTS

At the end of your shift print a closing summary report

At the end of the night print a closing expanded report for each drawer, a closing summary report for (FD1, FD2, FD3, FD4, Office & Office Manager), a payment method report- credit card for (FD1, FD2, FD3, FD4, Office & Office Manager)

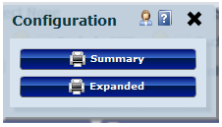
1. For closing summary/expanded reports:
   a. Hover your mouse over Reports then click General Ledger Reports

   b. For Logins: Select All, Ledger Numbers: Select All
   If you are ending your shift but not closing the drawer select only your drawer at the facility. If you are printing a closing reports check FD1, FD2, FD3, FD4, Office and Office Manager for the facility.
   Make sure to select today's date.



c. Then click Closing Detailed Report

d. A window will pop up like the one below. If it is the end of your shift or if you are printing a closing summary for all drawers click Summary. If you are closing out just your drawer select Expanded

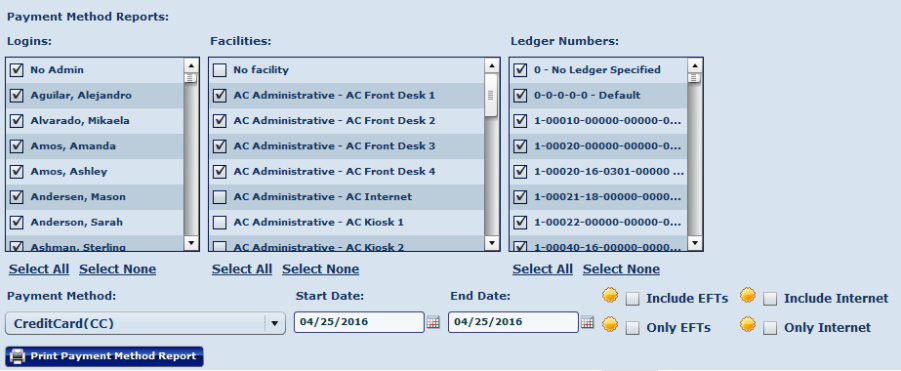


2. Print payment method reports

a. Hover your mouse over Reports, then click payment method reports

b. For Logins: Select All, Facilities: FD1, FD2, FD3, FD4, Office and Office Manager, Ledger Numbers: Select All.
Payment Method: Credit Card (CC).
Don't forget to select today's date. Then click Print Payment Method Report

DRAFT

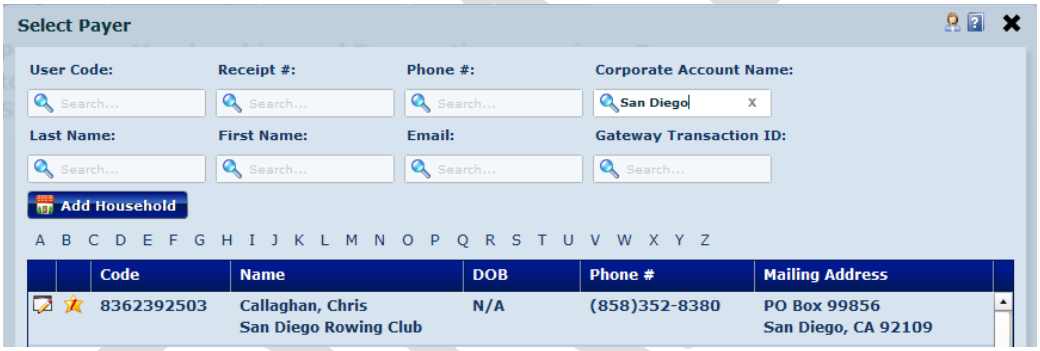


SPECIAL EVENTS

TEAM TENTS

How to process team tent reservations

1. Make sure they have filled out the tent request form.
    a. Check inbox, email, fax machine or with Heather for paperwork
2. Pull up their account in Park Pro by searching their team name in the *Corporate Account* section.



3. Park Pro will then ask you to select the users household or company account. Select the company account.

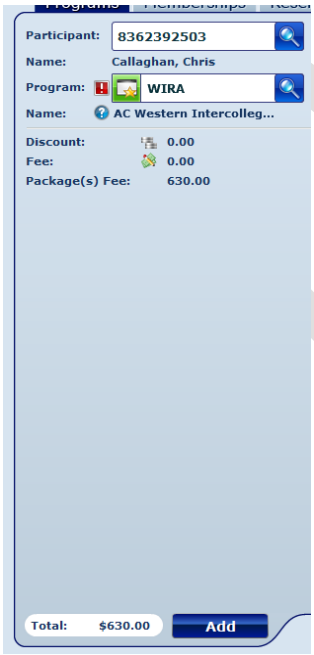
4. Click on *Programs* and select the payee as *user*. Select the appropriate code. Your screen should look similar to the one pictured below.

5. Check the box next to the options they wish to add.

a. To change the quantity of the item they wish to add, change the number under the QTY column

For example: San Diego wants 20 extra chairs and 5 extra tables. Change the QTY number to 20 for chairs and 5 for tables, then click the box next to the item.

6. Then click the add button to add items to shopping cart, then process.



DRAFT

7. Email or give the customer a receipt. Staple a copy of the receipt to their paperwork and file it in the team tent binder or put in Operation Managers mail box.

DRAFT