

# 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](mailto:acassistant@csus.edu)

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## LOGIN



CSU Sacramento

Username:

Password:

Viewing on Tablet?

Location:

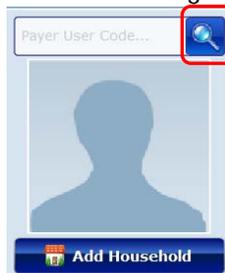
Facility:

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

## ACCOUNT INFORMATION

### CREATING ACCOUNTS

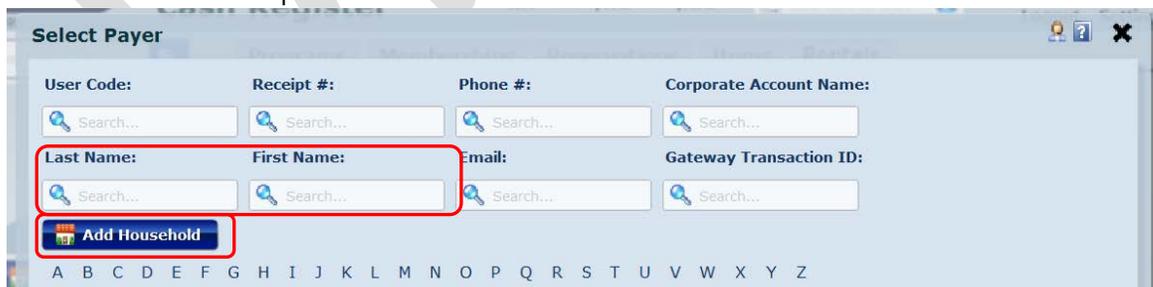
1. Click on the magnifying glass button.



Payer User Code...



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.



Select Payer

User Code:	Receipt #:	Phone #:	Corporate Account Name:
<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>
Last Name:	First Name:	Email:	Gateway Transaction ID:
<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>	<input type="text" value="Search..."/>

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

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

**Select Payer**

User Code:  Receipt #:  Phone #:  Corporate Account Name:

Last Name:  First Name:  Email:  Gateway Transaction ID:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Code	Name	DOB	Phone #	Mailing Address
	7379045264	Test, Tim	04/09/1972	(916)278-1110	1901 Hazel Ave Gold River, CA 95670

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

**Add Household**

First Name:

Last Name:

Birthdate: (MM/DD/YYYY)

Resident

Cell Phone:  Email Address:

Mailing Address:

Apt/Unit #:

City:

State:  Zip:

CA 95819

Enter the primary contact for this household. After clicking 'Add Household' you will be able to enter additional details and add more household members.

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.

**Manage Household Information** Programs Users Memberships Facilities Reports Communicat

Edit User Past Transactions Programs Memberships Facility Rentals Items

**Tim Test** User Settings User ID Name Last Update  
 Take Photo ★ 7379045264 Test, Tim  
 Print ID Card  
 Dues Owed  
 User Notes  
 Email/SMS

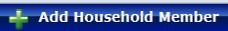
User Information Scholarships User Groups Medical/SRA Certificates

\*First Name: Tim \*Last Name: Test Email: Mailing Address: Billing Address:  
 Birthdate: (MM/DD/YYYY) 04/09/1972 Gender: Male Residency: 00/00/0000 Apt/Unit # Apt/Unit #  
 Cell #: Work #: Home #: (916)278-1110 City: City:  
 Height: 0 ft 0 in Weight: (lbs) 0 Grade: NA State: Zip: CA 95819 State: Zip: CA 95819

Save User Add Household Member Attached Files Merge Users Move/Remove User

Date	#	Transaction Info	Fee	Scanned	Membership Type

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 2<sup>nd</sup> 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.

**Add Household Member**

First Name:  
 Last Name:  
 Test  
 Birthdate: (MM/DD/YYYY)  
 Add as Primary Contact  
 Add as Secondary Contact  
 Add Household Member Cancel/Exit

## MERGING ACCOUNTS

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

Payer User Code... 

### Select Payer

User Code:  Receipt #:  Phone #:  Corporate Account Name:

Last Name:  First Name:  Email:  Gateway Transaction ID:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Code	Name	DOB	Phone #	Mailing Address
	46931	Test, Heather	04/18/1979	(916)278-2842	1901 Hazel Ave Gold River, CA 95670
	4656232332	Test, Heather	04/18/1979	(916)278-1110	1901 Hazel Ave Gold River, CA 95670

2. View the household information by clicking  button. Click on the  button.

### Manage Household Information

**Heather Test**

User Settings	User ID	Name	Last Update
	46931	Test, Heather	
	37593727	Test, Place Holder	
	41806049	Test, Jimmy	
	15447299	Test, Test	
	78710281	Test, test 2	

**User Information** Scholarships User Groups Medical/SRA Certificates

\*First Name:  \*Last Name:  Email:  Mailing Address:  Billing Address:

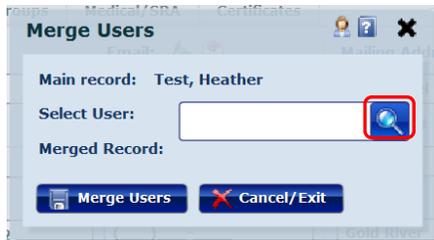
Birthdate: (MM/DD/YYYY)  Gender:  Residency:  Apt/Unit #:

Cell #:  Work #:  Home #:  City:  City:

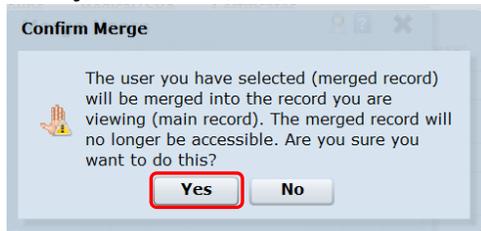
Height:   Weight: (lbs)  Grade:  State:  Zip:  State:  Zip:

Date	#	Transaction Info	Fee	Scanned	Membership Type
12/17	62901	Refund	0.00		
12/17	62901	Refund	0.00		
12/17	62901	AC Capital Crew Novice Women	0.00		
12/17	62901	AC Capital Crew Novice Women Payment #1	0.00		

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.

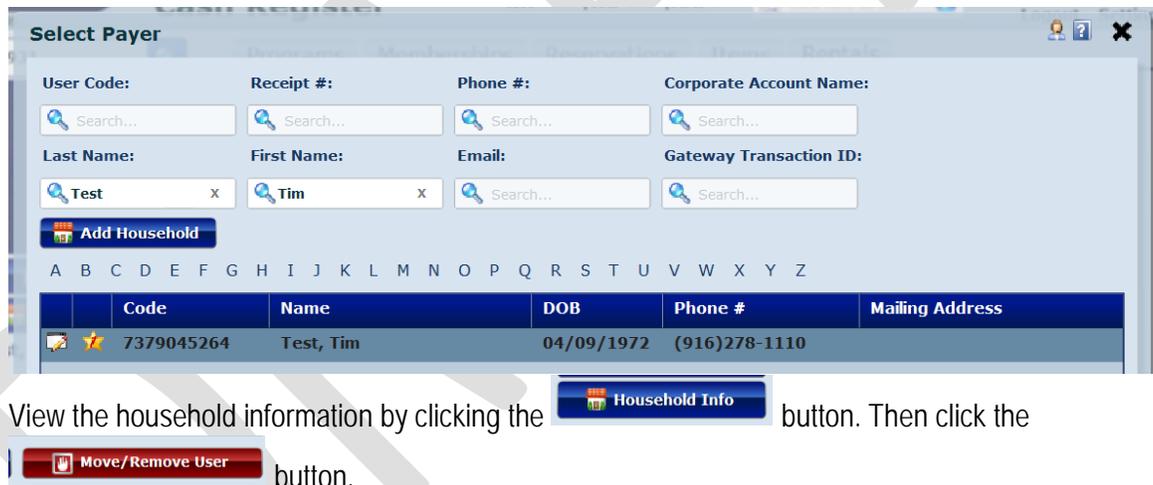


4. A new window will pop up that looks like the one pictured below. Click "Yes" to confirm the merge. Then you are finished.



## 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 **Household Info** button. Then click the **Move/Remove User** button.

**Manage Household Information**

Tim Test

User ID: 7379045264, Name: Test, Tim, Last Update: [blank]

User Information

\*First Name: Tim, \*Last Name: Test, Email: [blank], Mailing Address: [blank], Billing Address: [blank]

Birthdate: 04/09/1972, Gender: Male, Residency: 00/00/0000, Apt/Unit #: [blank]

Cell #: [blank], Work #: [blank], Home #: (916)278-1110, City: [blank]

Height: 0 ft 0 in, Weight: 0 lbs, Grade: NA, State: CA, Zip: 95819

Buttons: Save User, Add Household Member, Attached Files, Merge Users, **Move/Remove User**

Date	#	Transaction Info	Fee	Scanned	Membership Type

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

**Remove User**

Buttons: Permanently Delete User, **Move user into new household**, **Add user into an existing household**

- a. **Move user into new household** If you click this button a new window will pop up like the one pictured below. Click "Yes" to continue.

**Confirm New Household**

This user will become the primary contact of a new household. If there is no remaining primary contact in the current household, one will be selected. Are you sure you wish to continue?

Buttons: **Yes**, No

- b. **Add user into an existing household** 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.

**Search Users**

User Code:  Search...    Receipt #:  Search...    Phone #:  Search...    Corporate Account Name:  Search...

Last Name:  Test x    First Name:  Heather x    Email:  Search...    Gateway Transaction ID:  Search...

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Code	Name	DOB	Phone #	Mailing Address
<input type="checkbox"/>	46931	Test, Heather	04/18/1979	(916)278-2842	1901 Hazel Ave Gold River, CA 95670

## 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.

**Select Rental Items**

Group/Package Code:  Search...    Group/Package Name:  Search...   

Rental Item	Rental Code
AC Single Kayak	SNGLKAYAK
AC Tandem Kayak	TANDEMKAYAK
AC Manta Kayak	MANTAKAYAK
AC Prowler Kayak	PROWLERKAYAK
AC Peekaboo Kayak	PEEKABOOKAYAK
AC Cabo Kayak	CABOKAYAK

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.



X	Item	User	Start	End	Users
<input checked="" type="checkbox"/>	AC Single Kayak #1	Test, Heather	04/22 8:58 AM	04/22 8:59 AM	1
<input checked="" type="checkbox"/>	AC Backrest #3	Test, Heather	04/22 8:58 AM	04/22 8:59 AM	1
<input checked="" type="checkbox"/>	AC Backrest #1	Test, Jimmy	04/22 8:58 AM	04/22 8:59 AM	1
<input checked="" type="checkbox"/>	AC Backrest #2	Test, Jimmy	04/22 8:58 AM	04/22 8:59 AM	1
<input checked="" type="checkbox"/>	AC Tandem Kayak #2	Test, Jimmy	04/22 9:02 AM	04/22 9:03 AM	1

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

Out	In	Item Name	Notes	User Name	#	Start Time	End Time	Price
		AC Backrest #1	Box 100	Jimmy Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	1.00
		AC Backrest #2		Jimmy Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	1.00
		AC Backrest #3		Heather Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	1.00
		AC Single Kayak #1		Heather Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	0.00
		AC Tandem Kayak #2		Jimmy Test	2	04/22/2016 9:03 AM	04/22/2016 9:03 AM	0.00

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.

Start Time: 04/22/2016 9:03 AM	Deposit: 0.00	Check-Out
End Time: 04/22/2016 9:03 AM	Add Deposit	Item Returned Notes:
Rental Notes: Box 100	Mark Walver Signed	
# of users: 2	Valid Until: [Not Signed]	Submit Item For Repairs
Change Item: No Change	Print Walver	
Save Rental Item Details	Print Agreement	
Cancel		

## CHECK IN RENTALS

- Pull up the account of the individual/group.
  - If you are having trouble finding their account... 1) Try looking up each 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)
- 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.

Out	In	Item Name	Notes	User Name	#	Start Time	End Time	Price
		AC Backrest #1	Box 100	Jimmy Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	1.00
		AC Backrest #2		Jimmy Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	1.00
		AC Backrest #3		Heather Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	1.00
		AC Single Kayak #1		Heather Test	1	04/22/2016 9:03 AM	04/22/2016 8:59 AM	0.00
		AC Tandem Kayak #2		Jimmy Test	2	04/22/2016 9:03 AM	04/22/2016 9:03 AM	0.00

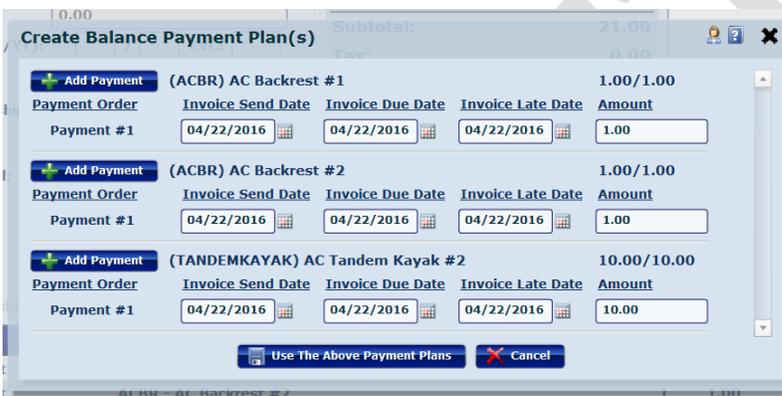
- Click the *All* button to add all equipment to the shopping cart.  
\*Even if they are paying separately add everything to the cart!

Out	In	Item Name	Notes	User Name	#	Start Time	End Time	Price
		AC Backrest #1	Box 100	Jimmy Test	1	04/22/2016 9:03 AM	04/22/2016 9:16 AM	1.00
		AC Backrest #2		Jimmy Test	1	04/22/2016 9:03 AM	04/22/2016 9:16 AM	1.00
		AC Backrest #3		Heather Test	1	04/22/2016 9:03 AM	04/22/2016 9:16 AM	1.00
		AC Single Kayak #1		Heather Test	1	04/22/2016 9:03 AM	04/22/2016 10:16 AM	8.00
		AC Tandem Kayak #2		Jimmy Test	2	04/22/2016 9:03 AM	04/22/2016 10:16 AM	10.00

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*.



10.00      Subtotal: 21.00  
Tax: 0.00

**Create Balance Payment Plan(s)**

**+ Add Payment** (ACBR) AC Backrest #1      1.00/1.00

Payment Order	Invoice Send Date	Invoice Due Date	Invoice Late Date	Amount
Payment #1	04/22/2016	04/22/2016	04/22/2016	1.00

**+ Add Payment** (ACBR) AC Backrest #2      1.00/1.00

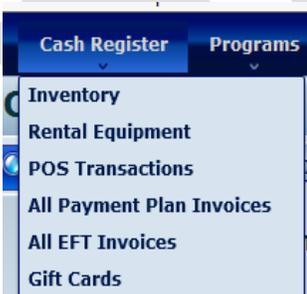
Payment Order	Invoice Send Date	Invoice Due Date	Invoice Late Date	Amount
Payment #1	04/22/2016	04/22/2016	04/22/2016	1.00

**+ Add Payment** (TANDEMKAYAK) AC Tandem Kayak #2      10.00/10.00

Payment Order	Invoice Send Date	Invoice Due Date	Invoice Late Date	Amount
Payment #1	04/22/2016	04/22/2016	04/22/2016	10.00

## 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 .

New Equipment    New Equipment Package

Item Name:    Item Code:    Facility:    Show:

Search...    Search...    Select Facility    Rental Items

Name	Code	Items	Active	Out
AC Single Kayak	SNGLKAYAK	95	90	5
AC Tandem Kayak	TANDEMKAYAK	62	61	1
AC Manta Kayak	MANTAKAYAK	2	2	0
AC Prowler Kayak	PROWLERKAYAK	4	3	1
AC Peekaboo Kayak	PEEKABOOKAYAK	8	7	1
AC Cabo Kayak	CABOKAYAK	10	10	0
AC Kids Kayak	KIDSKAYAK	28	28	0
AC River Kayak	RIVERKAYAK	11	11	0
AC Surf Ski Kayak	SURFSKYKAYAK	13	12	1
AC Viking Kayak	VIKINGKAYAK	5	5	0
AC SUP Board	ACSUP	48	45	3
AC BIC SUP	ACBICSUP	83	83	0

For items listed above:

By User Group
 Between  and

## 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.

Select Rental Items

Start Time: 05/04/2016 6:03 AM Rental Item Name:

End Time: 05/04/2016 6:04 AM

[BACK](#) [Search Rental Item](#) [Show Unavailable](#)

Rental Item	Details	Notes	Status	Current Renter
+ AC BIC SUP #65			AVAILABLE	
+ AC BIC SUP #66			AVAILABLE	
+ AC BIC SUP #67			AVAILABLE	
+ AC BIC SUP #68			AVAILABLE	
+ AC BIC SUP #69			AVAILABLE	
+ AC BIC SUP #1			AVAILABLE	
+ AC BIC SUP #2			AVAILABLE	

[Save Rental](#)

X Item	User	Start	End	Users
X AC BIC SUP #62	<a href="#">Wilhelmi, Heather</a>	05/04 6:03 AM	05/04 6:04 AM	1
X AC BIC SUP #63	<a href="#">Wilhelmi, Heather</a>	05/04 6:03 AM	05/04 6:04 AM	1
X AC BIC SUP #64	<a href="#">Wilhelmi, Heather</a>	05/04 6:03 AM	05/04 6:04 AM	1

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

User	Start	End	Users
<a href="#">Wilhelmi, Heather</a>	05/04 6:03 AM	05/04 6:04 AM	1

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:

Select Rental Items

Start Time: 05/04/2016 6:03 AM Rental Item Name:

End Time: 05/04/2016 6:04 AM

[BACK](#) [Search Rental Item](#) [Show Unavailable](#)

Rental Item	Details	Notes	Status	Current Renter
+ AC BIC SUP #65			AVAILABLE	
+ AC BIC SUP #66			AVAILABLE	
+ AC BIC SUP #67			AVAILABLE	
+ AC BIC SUP #68			AVAILABLE	
+ AC BIC SUP #69			AVAILABLE	
+ AC BIC SUP #1			AVAILABLE	
+ AC BIC SUP #2			AVAILABLE	

Start time must be before end time.

[OK](#)

[Save Rental](#)

X Item	User	Start	End	Users
X AC BIC SUP #62	Wilhelmi, Heather	05/04 6:03 AM	05/04 6:04 AM	1
X AC BIC SUP #63	Wilhelmi, Heather	05/04 6:03 AM	05/04 6:04 AM	1
X AC BIC SUP #64	Wilhelmi, Heather	05/04 6:03 AM	05/04 6:04 AM	1

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

[Existing Rentals](#) [New Rental](#) [Add Item\(s\)](#) [Agreement](#) [Agreement](#) [Mark Waivers Signed](#)

ALL	Out	In	Item Name	Notes	User Name	#	Start Time
<a href="#">Out</a>	<a href="#">Check-Out</a>		AC BIC SUP #62		Heather Wilhelmi	1	05/04/2016 6:03 AM
<a href="#">Out</a>	<a href="#">Check-Out</a>		AC BIC SUP #63		Cindi Dular	1	05/04/2016 6:03 AM
<a href="#">Out</a>	<a href="#">Check-Out</a>		AC BIC SUP #64		Ashley Langenberg	1	05/04/2016 6:03 AM
<a href="#">Out</a>	<a href="#">Check-Out</a>		AC Prowler Kayak #1		Paul Bertrand	1	05/04/2016 6:08 AM
<a href="#">Out</a>	<a href="#">Check-Out</a>		AC Tandem Kayak #2		Brian Dular	1	05/04/2016 6:08 AM

See how everyone's name is attached to the correct piece of equipment now.

This is important for TWO reasons:

#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 [Household Info](#). Then click on [User Settings](#).

**Manage Household Information** Programs Users Memberships Facilities Reports Community

Edit User Past Transactions Programs Memberships Facility Rentals Items

**Heather Test** **User Settings**

User ID	Name	Last Update
★ 46931	Test, Heather	
★ 7379045264	Test, Tim	
★ 37593727	Test, Place Holder	
★ 41806049	Test, Jimmy	
★ 15447299	Test, Test	

Take Photo Print ID Card Dues Owed User Notes Email/SMS

**User Information** Scholarships User Groups Medical/SRA Certificates

\*First Name: Heather \*Last Name: Test Email: hheieck@csus.edu Mailing Address: 1901 Hazel Ave Billing Address: 1901 Hazel Ave

Birthdate: (MM/DD/YYYY) 04/18/1979 Gender: Female Residency: 00/00/0000 Apt/Unit #: City: Gold River

Cell #: Work #: (916)278-2842 Home #: State: CA Zip: 95670

Height: 0 ft 0 in Weight: (lbs) 0 Grade: NA

Save User Add Household Member Attached Files Merge Users Move/Remove User

Date	#	Transaction Info	Fee	Scanned	Membership Type
12/17	6290	Refund	0.00		
12/17	6290	Refund	0.00		
12/17	6290	AC Capital Crew Novice Women	0.00		
12/17	6290	AC Capital Crew Novice Women Payment #1	0.00		

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.

**User Settings** Name

Settings Payment Profiles

Edit Account:

Inactive

Username: htest

Current Password: password123

Change Password

Require password change on next login

Save Account Cancel/Exit

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

Change Password

Require password change on next login

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 . 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 .

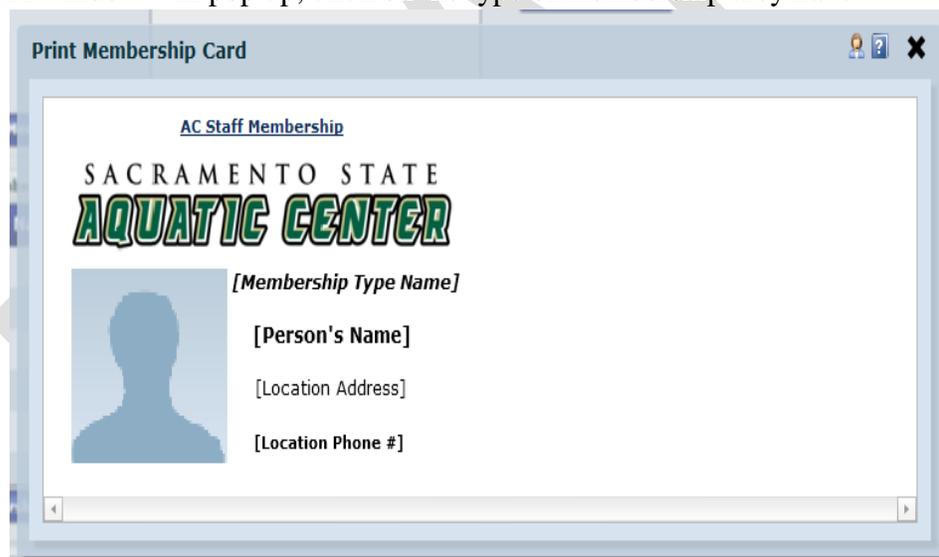
## HOW TO PRINT ID CARDS

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



Code	User Name	Membership Type	Start	Expiration	Paid	Type
46931	Test, Heather	1/2 yr Family Padding	04/22/2016	10/21/2016	YES	FULL

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



AC Staff Membership

SACRAMENTO STATE  
**AQUATIC CENTER**

 [Membership Type Name]

[Person's Name]

[Location Address]

[Location Phone #]

5. Print to the *Magocard 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.

The screenshot shows the 'Viewing Programs' interface with the following search filters: Program Name: GUPPIES08, Program Code: GUPPIES08, Season: 2015 Aquatic Ce, Program Type: Select Type, Program Status: All. Below the filters is a table with one row of data:

Program Name	Code	Start	Reg.	Avail.	Wait
AC Youth - Basic Camp (7 Guppies)	GUPPIES08	2015-08-03	22	2	2

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)

The screenshot shows the 'Viewing Programs' interface with the following search filters: Program Name: BROW, Program Code: BROW, Season: 2016 Aquatic Ce, Program Type: Select Type, Program Status: Active. Below the filters is a table with multiple rows of data:

Program Name	Code	Start	Reg.	Avail.	Wait
AC Basic Rowing	BROW01	2015-03-21	5	1	0
AC Basic Rowing	BROW06	2015-04-25	4	2	0
AC Basic Rowing	BROW07	2016-05-02	1	5	0
AC Basic Rowing	BROW08	2016-05-31	1	5	0
AC Basic Rowing	BROW09	2016-06-04	5	1	0
AC Basic Rowing	BROW10	2016-06-06	1	5	0
AC Basic Rowing	BROW11	2016-06-13	1	5	0
AC Basic Rowing	BROW12	2016-06-27	1	5	0
AC Basic Rowing	BROW13	2016-07-09	0	6	0
AC Basic Rowing	BROW14	2016-07-18	0	6	0

## REGISTRATION

### HOW TO REGISTER FOR A CLASS

1. Pull up the account of the parent/guardian/individual 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.

Participant: 46931  
 Name: Test, Heather  
 Program: KAYAK08  
 Name: AC Basic Kayaking  
 Discount: 0.00  
 Fee: 80.00  
 Payment Plan Fee: 0.00

Code	Sessions	Start	End
KAYAK01	AC Basic Kayaking SESSION # 1	2016-04-19	2016-04-21
KAYAK02	AC Basic Kayaking SESSION # 2	2016-05-03	2016-05-05
KAYAK03	AC Basic Kayaking SESSION # 3	2016-05-09	2016-05-11
KAYAK04	AC Basic Kayaking SESSION # 4	2016-05-16	2016-05-18
KAYAK05	AC Basic Kayaking SESSION # 5	2016-05-31	2016-06-02
KAYAK06	AC Basic Kayaking SESSION # 6	2016-06-13	2016-06-14
KAYAK07	AC Basic Kayaking SESSION # 7	2016-06-18	2016-06-19
KAYAK08	AC Basic Kayaking SESSION # 8	2016-06-21	2016-06-23
KAYAK09	AC Basic Kayaking SESSION # 9	2016-06-25	2016-06-26

Payment	Due	Late	Status	Price
<input type="checkbox"/> AC Basic Kayaking Payment #1	N/A	N/A	NOT PAID	40.00
<input type="checkbox"/> AC Basic Kayaking Payment #2	06/18/2016	06/18/2016	NOT PAID	40.00

4. If they wish to pay in full simply click the **Add** button to move the item to the shopping cart and proceed to step 8.

If they wish to pay only the deposit proceed to the next step.

5. If they wish to pay only the deposit check the box next to Payment #1

Payment	Due	Late	Status	Price
<input checked="" type="checkbox"/> AC Basic Kayaking Payment #1	N/A	N/A	NOT PAID	40.00
<input type="checkbox"/> AC Basic Kayaking Payment #2	06/18/2016	06/18/2016	NOT PAID	40.00

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.

Additional Information

AC T-Shirt Size: Large

I agree to the Aquatic Center refund & transfer policy: Yes

Save Responses

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

- Pull up the account of the parent/guardian you are speaking to.
- Click **Programs**
- 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.

Code	Sessions	Start	End
SHARKS01	AC Youth - Basic Camp (13+ Sharks) SESSION # 1	2016-06-06	2016-06-10
SHARKS02	AC Youth - Basic Camp (13+ Sharks) SESSION # 2	2016-06-13	2016-06-17
SHARKS03	AC Youth - Basic Camp (13+ Sharks) SESSION # 3	2016-06-20	2016-06-24
SHARKS04	AC Youth - Basic Camp (13+ Sharks) SESSION # 4	2016-06-27	2016-07-01
SHARKS05	AC Youth - Basic Camp (13+ Sharks) SESSION # 5	2016-07-11	2016-07-15
SHARKS06	AC Youth - Basic Camp (13+ Sharks) SESSION # 6	2016-07-18	2016-07-22
SHARKS07	AC Youth - Basic Camp (13+ Sharks) SESSION # 7	2016-07-25	2016-07-29
SHARKS08	AC Youth - Basic Camp (13+ Sharks) SESSION # 8	2016-08-01	2016-08-05
SHARKS09	AC Youth - Basic Camp (13+ Sharks) SESSION # 9	2016-08-08	2016-08-12

Payment	Due	Late	Status	Price
<input type="checkbox"/> AC Youth - Basic Camp (13+ Sharks) Payment #1	N/A	N/A	NOT PAID	100.00
<input checked="" type="checkbox"/> AC Youth - Basic Camp (13+ Sharks) Payment #2	08/01/2016	08/01/2016	NOT PAID	210.00

- If they wish to pay in full simply click the **Add** button to move the item to the shopping cart and proceed to step 8.
- If they wish to pay only the deposit or want to add Campout to camp proceed to the next step.
- If they wish to pay only the deposit check the box next to Payment #1

Payment	Due	Late	Status	Price
<input checked="" type="checkbox"/> AC Youth - Basic Camp (13+ Sharks) Payment #1	N/A	N/A	NOT PAID	100.00
<input type="checkbox"/> AC Youth - Basic Camp (13+ Sharks) Payment #2	08/01/2016	08/01/2016	NOT PAID	210.00

- If they want to add Campout click on **Packages**

Option Name	QTY	Price
<input checked="" type="checkbox"/> AC Youth - Camp Out	1	55.00
<input type="checkbox"/> AC Youth - Camp Out	1	55.00

Click the **Add** button to move the item to the shopping cart.

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

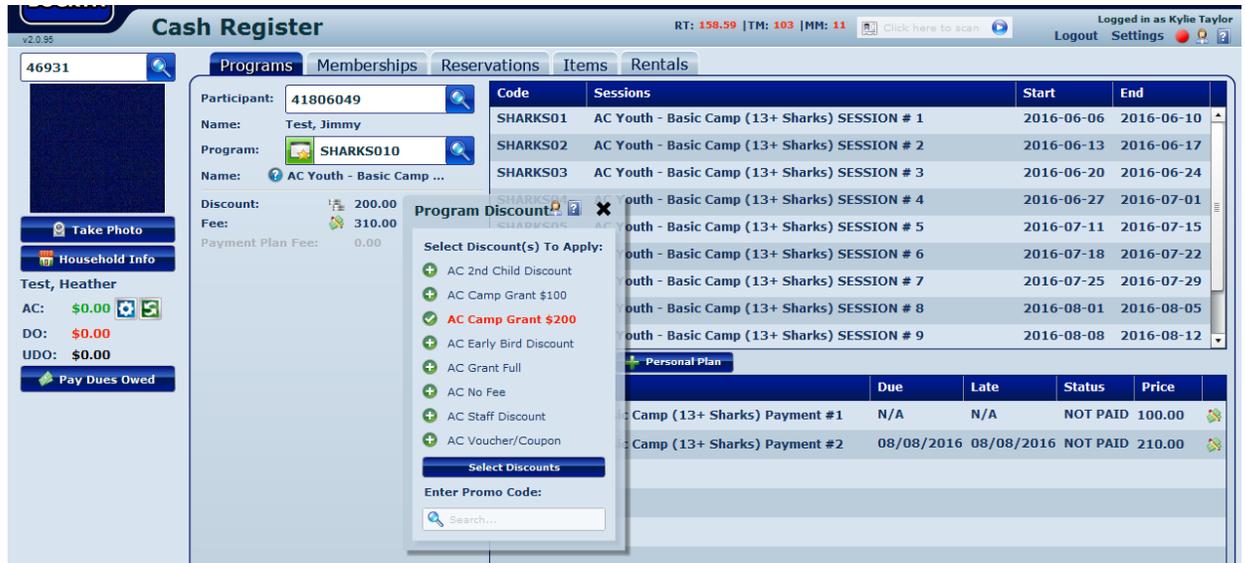
AC Youth T-Shirt Size: **Adult Large**

I agree to the Aquatic Center refund & transfer policy: **Yes**

**Save Responses**

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

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



The screenshot shows the 'Cash Register' interface. On the left, there's a participant profile for 'Test, Jimmy' (ID: 41806049) with a fee of 310.00. A 'Program Discount' dialog box is open, listing various discounts, with 'AC Camp Grant \$200' selected. The main table shows sessions for 'SHARKS01' through 'SHARKS09'. Below the table, there are payment entries for 'Camp (13+ Sharks) Payment #1' and '#2', both marked as 'NOT PAID'.

Code	Sessions	Start	End
SHARKS01	AC Youth - Basic Camp (13+ Sharks) SESSION # 1	2016-06-06	2016-06-10
SHARKS02	AC Youth - Basic Camp (13+ Sharks) SESSION # 2	2016-06-13	2016-06-17
SHARKS03	AC Youth - Basic Camp (13+ Sharks) SESSION # 3	2016-06-20	2016-06-24
SHARKS04	AC Youth - Basic Camp (13+ Sharks) SESSION # 4	2016-06-27	2016-07-01
SHARKS05	AC Youth - Basic Camp (13+ Sharks) SESSION # 5	2016-07-11	2016-07-15
SHARKS06	AC Youth - Basic Camp (13+ Sharks) SESSION # 6	2016-07-18	2016-07-22
SHARKS07	AC Youth - Basic Camp (13+ Sharks) SESSION # 7	2016-07-25	2016-07-29
SHARKS08	AC Youth - Basic Camp (13+ Sharks) SESSION # 8	2016-08-01	2016-08-05
SHARKS09	AC Youth - Basic Camp (13+ Sharks) SESSION # 9	2016-08-08	2016-08-12

13. Click the **Add** 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.



The 'Additional Information' dialog box shows 'AC Youth T-Shirt Size' set to 'Adult Large' and 'I agree to the Aquatic Center refund & transfer policy' set to 'Yes'. There is a 'Save Responses' button at the bottom.

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

**Transaction Checkout**

Cash: 0.00  
 Check: # Amount: 0.00  
 Credit: # Amount: 0.00  
 Exp.(MM/YY): / CVC:  
 Auth: Type  
 Scholarship: Select Scholarship Payme Amount: 0.00 Bal.: 0.0  
 Gift Card: Amount: 0.00 Bal.: 0.0  
 Other: Select Other Payment Mei Amount: 0.00  
 Acc. Credit: 0.00

Payer: Test, Heather  
 Available Credit: 0.00  
 Dues Owed: 0.00  
 Amount: 310.00  
 Discount: 200.00  
 Subtotal: 110.00  
 Tax: 0.00  
 Total: 110.00  
 Amt. Received: 0.00  
 Amt. Remaining: 110.00  
 CHANGE: 0.00

Transaction Comments:

Name	Description	QTY	Price
Test, Jimmy	SHARKS010 - AC Youth - Basic Camp (13+ Sharks)	1	110.00

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

**Use The Above Payment Plans**

Create Balance Payment Plan(s) Amt. Remaining: 110.00

(SHARKS010) AC Youth - Basic Camp (13+ Sharks) 110.00/110.00

Payment Order	Invoice Send Date	Invoice Due Date	Invoice Late Date	Amount
Payment #1	04/24/2016	04/24/2016	04/24/2016	110.00

## TRANSFERRING PROGRAMS

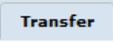
- Click .
- Search for the program that the individual is currently registered in. Click on the people to pull up the program.

Program Name: Search... Program Code: Canoe01  Below Minimum Registrants  
 Season: 2016 Aquatic Ce Program Type: Select Type Program Status: Active

Program Name	Code	Start	Reg.	Avail.	Wait
 AC Basic Canoeing	CANOE01	2016-06-12	1	15	0

- Click on the  button.

	Hart, Shawn	(209)406-1245	6765 Linda Sue Way Fair Oaks, CA 95628
---	-------------	---------------	---

- Click .  
Find the program they wish to transfer to.

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

Pay #	Due Date	Paid	XFR	XFR Amount
Pay #1	01/01/2011	45.00	<input checked="" type="checkbox"/>	45.00
Pay #2	06/15/2016	0.00		

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

Pay #	Send Date	Due Date	Late Date	Paid	Fee
Pay #1				45.00	45.00
Pay #2	06/16/2016	06/18/2016	06/16/2016	0.00	45.00
Pay #3	04/20/2016	04/20/2016	04/20/2016	0.00	10.00
<b>Totals:</b>				<b>45.00</b>	<b>100.00</b>

- 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.

Reason for transfer:  
 (ACTRAN) AC Transfer

Additional Comments:  
 Class transfer.

Item Transfer Verified & Ready

Transfer Selected Transaction Item(s)

- Click

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

**Confirm Transfer**

Are you sure you want to transfer the Transaction Item(s) you have selected?

Yes No

- 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.



**Confirm Transfer**

Payer Name: Loren Breck

**AC Basic Kayaking**

User: Jo Breck

Amount Paid: 45.00

Amount Transferred: 45.00

Amount To Refund: 0.00

New Item Cost: 135.00

Amount Applied: 45.00

0.00

Complete Transfer Cancel Transfer

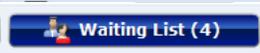
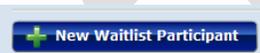
## WAITLISTS

### 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.

		AC Youth - Basic Camp (11 Seals)	SEALS04	2015-07-06	25	0	4
--	--	----------------------------------	---------	------------	----	---	---

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*.



Browsing 1 user 06/08/15

**Determine Fees**

Set fees due when added: 

\$300.00

Add Participant Cancel/Exit

### Adding to Program from Waitlist

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

		AC Youth - Basic Camp (11 Seals)	SEALS04	2015-07-06	25	0	4
---	---	----------------------------------	---------	------------	----	---	---

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*.



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)

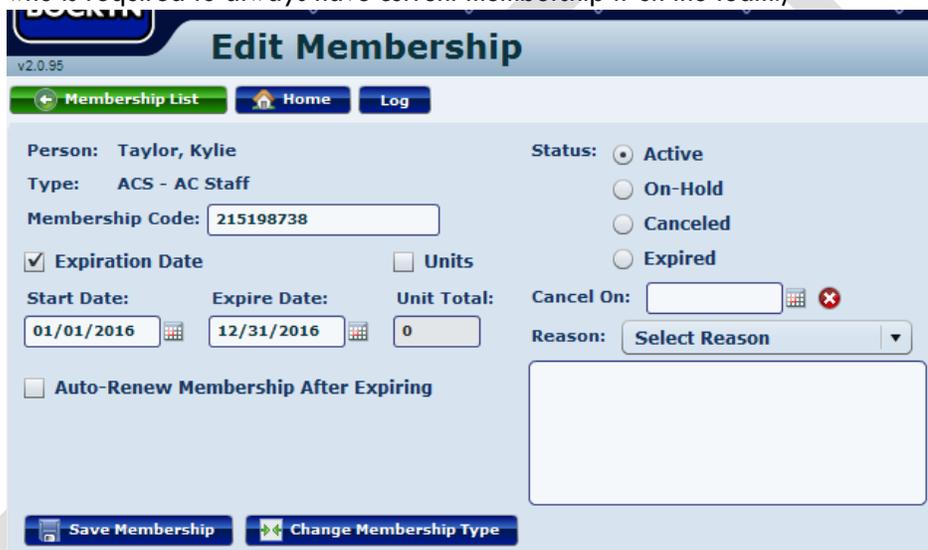
Code	Membership Type Name	Family	Members
ACFP12	1 yr Family Paddling	YES	10
ACFR12	1 yr Family Rowing	YES	10
ACFS12	1 yr Family Sailing	YES	10
ACGFAM12	1 yr General Family Affiliation	YES	10
ACGAIM12	1 yr General Individual Affiliation	NO	0
ACIP12	1 yr Individual Paddling	NO	0
ACRM12	1 yr Individual Rowing	NO	0
ACIS12	1 yr Individual Sailing	NO	0
ACFP6	1/2 yr Family Paddling	YES	10
ACFR6	1/2 yr Family Rowing	YES	10
ACFS6	1/2 yr Family Sailing	YES	4
ACGFAM6	1/2 yr General Family Affiliation	YES	10
ACGIAM6	1/2 yr General Individual Affiliation	NO	0
ACIP6	1/2 yr Individual Paddling	NO	0
ACIR6	1/2 yr Individual Rowing	NO	0
ACIS6	1/2 yr Individual Sailing	NO	0
ACFR3	1/4 yr Family Rowing	YES	10
ACIR3	1/4 yr Individual Rowing	NO	0

Customer Information: User: 46931, Name: Test, Heather, Fac.: ACFD1, Name: AC Front Desk 1, Discount: 0.00, Fee: 500.00, Family Price: 0.00, Family PP Fee: 0.00. Total: \$500.00. Add button is visible.

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.)



**Edit Membership**  
v2.0.95

Membership List Home Log

Person: Taylor, Kylie      Status:  Active  
 Type: ACS - AC Staff       On-Hold  
 Membership Code: 215198738       Canceled  
 Expiration Date       Units       Expired

Start Date: 01/01/2016      Expire Date: 12/31/2016      Unit Total: 0      Cancel On:   

Auto-Renew Membership After Expiring      Reason: Select Reason 

Save Membership Change Membership Type

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*.



Household Info

Test, Heather

AC: \$0.00  

DO: \$0.00

UDO: \$0.00

Pay Dues Owed

Enter Amount

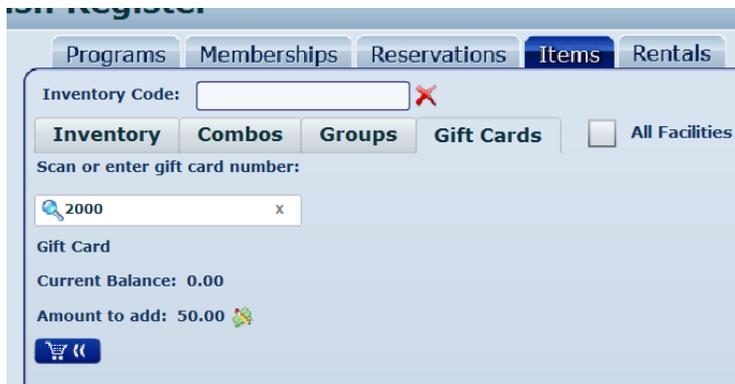
Enter Amount: 0.00

Add Credits To Cart

4. Then click  and process.

## GIFT CARDS

1. Go to 
2. Click 



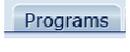
3. On the back of the card there will be a number underneath the barcode. Type this number in the search bar. Click  and enter the amount the gift card is for. Then click the shopping cart icon to add the gift card to the shopping cart.



4. Then click 

## CAPITAL CREW

## PAYING IN FULL

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

**BOCKYN** Cash Register Programs Users Memberships Facilities Reports Communicatio...  
 v2.0.95 RT: 14:55 | TM: 127 | MM: 164  
 Logged in as Kylie Taylor  
 Logout Settings

3799381763 Programs Memberships Reservations Items Rentals

Programs, Memberships and Reservations require a Payer to be selected before you can start adding them to the Shopping Cart!

Take Photo  
 Household Info  
 Zerne, Regina  
 AC: \$0.00  
 DO: \$0.00  
 UDO: \$0.00  
 Pay Dues Owed

Total: Add Clear Sale (Empty Cart) Facility: AC Front Desk 1

Description	User	QTY	Price

Subtotal: \$0.00  
 Discount: \$0.00  
 Total: \$0.00  
 Open Cash Drawer  
 Complete Sale

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

**BOCKYN** Cash Register Programs Users Memberships Facilities Reports Communicatio...  
 v2.0.95 RT: 27:23 | TM: 149 | MM: 177  
 Logged in as Kylie Taylor  
 Logout Settings

3799381763 Programs Memberships Reservations Items Rentals

Participant: 2815161663  
 Name: Patrick, Nils  
 Program: CCVM01  
 Name: AC Capital Crew Varsity...  
 Discount: 0.00  
 Fee: 625.00  
 Payment Plan Fee: 0.00

Code	Sessions	Start	End
CCVM01	AC Capital Crew Varsity Men SESSION # : 2016-01-04	2016-01-04	2016-05-10
CCVM02	AC Capital Crew Varsity Men SESSION # : 0000-00-00	0000-00-00	0000-00-00

Payment Plan Personal Plan Packages

Payment	Due	Late	Status	Price
<input type="checkbox"/> AC Capital Crew Varsity Men	N/A	N/A	NOT PAID	175.00
<input type="checkbox"/> AC Capital Crew Varsity Men	02/05/2016	02/05/2016	NOT PAID	175.00
<input type="checkbox"/> AC Capital Crew Varsity Men	03/05/2016	03/05/2016	NOT PAID	175.00
<input type="checkbox"/> AC Capital Crew Varsity Men	04/05/2016	04/05/2016	NOT PAID	100.00

Total: \$625.00 Add Clear Sale (Empty Cart) Facility: AC Front Desk 1

Description	User	QTY	Price

Subtotal: \$0.00  
 Discount: \$0.00  
 Total: \$0.00  
 Open Cash Drawer  
 Complete Sale

- 
- Click the **Complete Sale** 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.

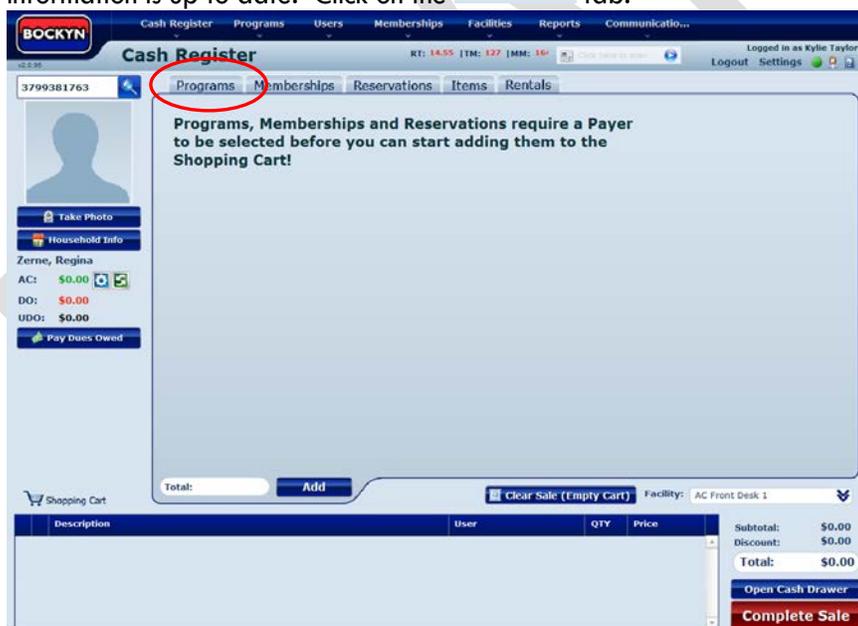
#### \$25.00 TRY-OUT FEE – APPLY TO REST OF SEMESTER

- 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.

<input checked="" type="checkbox"/>	AC Capital Crew Varsity Men	N/A	N/A	NOT PAID	175.00
-------------------------------------	-----------------------------	-----	-----	----------	--------

Then click the **Add** button.

If they do not want to pay for boosters proceed to step #4.

**BOCKYN** Cash Register Programs Users Memberships Facilities Reports Communicatio...

RT: 27.23 | TM: 149 | MM: 17 | Click here to scan

Logged in as Kylie Taylor Logout Settings

3799381763

Participant: 2815161663  
Name: Patrick, Nils  
Program: CCVM01  
Name: AC Capital Crew Varsity...

Discount: 0.00  
Fee: 625.00  
Payment Plan Fee: 0.00

Code	Sessions	Start	End
CCVM01	AC Capital Crew Varsity Men SESSION # : 2016-01-04	2016-01-04	2016-05-10
CCVM02	AC Capital Crew Varsity Men SESSION # : 0000-00-00	0000-00-00	0000-00-00

Payment	Due	Late	Status	Price
<input type="checkbox"/> AC Capital Crew Varsity Men	N/A	N/A	NOT PAID	175.00
<input type="checkbox"/> AC Capital Crew Varsity Men	02/05/2016	02/05/2016	NOT PAID	175.00
<input type="checkbox"/> AC Capital Crew Varsity Men	03/05/2016	03/05/2016	NOT PAID	175.00
<input type="checkbox"/> AC Capital Crew Varsity Men	04/05/2016	04/05/2016	NOT PAID	100.00

Total: \$625.00 Add

Clear Sale (Empty Cart) Facility: AC Front Desk 1

Description	User	QTY	Price

Subtotal: \$0.00  
Discount: \$0.00  
Total: \$0.00

Open Cash Drawer  
Complete Sale

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.

Participant: 2815161663  
Name: Patrick, Nils  
Program: BOOSTER01  
Name: AC Capital Crew Booste...

Discount: 0.00  
Fee: 165.00  
Payment Plan Fee: 25.00

Code	Sessions	Start	End
BOOSTER01	AC Capital Crew Booster Fees SESSION # 2016-01-04	2016-01-04	2016-05-11
BOOSTER02	AC Capital Crew Booster Fees SESSION # 0000-00-00	0000-00-00	0000-00-00

Payment	Due	Late	Status	Price
<input checked="" type="checkbox"/> AC Capital Crew Booster Fee	N/A	N/A	NOT PAID	25.00
<input type="checkbox"/> AC Capital Crew Booster Fee	02/05/2016	02/05/2016	NOT PAID	25.00
<input type="checkbox"/> AC Capital Crew Booster Fee	03/05/2016	03/05/2016	NOT PAID	25.00
<input type="checkbox"/> AC Capital Crew Booster Fee	04/05/2016	04/05/2016	NOT PAID	90.00

Total: \$25.00 Add

Clear Sale (Empty Cart) Facility: AC Front Desk 1

Complete Sale

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.

**Transaction Checkout**

Cash: 0.00  
 Check: # Amount: 0.00  
 Credit: # \*\*\*\*\* Amount: 200.00  
 Exp.(MM/YY): \*\* / \*\* CV... \*\*\*  
 Auth: Other  
 Scholarship: Select Scholarship Payme Amount: 0.00 Bal.: 0.0  
 Gift Card: Search... Amount: 0.00 Bal.: 0.00  
 Other: Select Other Payment Me! Amount: 0.00  
 Acc. Credit: 0.00

**Payer:** Zerne, Regina  
**Available Credit:** 0.00  
**Dues Owed:** 0.00  
**Amount:** 200.00  
**Discount:** 0.00  
**Subtotal:** 200.00  
**Tax:** 0.00  
**Total:** 200.00  
**Amt. Received:** 200.00  
**Amt. Remaining:** 0.00  
**CHANGE:** 0.00

**Transaction Comments:**  
Auth by Capital Crew Payment Plan form. |

Name	Description	QTY	Price	CC	EF
Patrick, Nils	CCVM01 - AC Capital Crew Varsity Men	1	0.00	0.00	<input checked="" type="checkbox"/>
Patrick, Nils	AC Capital Crew Varsity Men Payment #1	1	175.00	175.00	<input checked="" type="checkbox"/>
Patrick, Nils	BOOSTER01 - AC Capital Crew Booster Fees	1	0.00	0.00	<input checked="" type="checkbox"/>
Patrick, Nils	AC Capital Crew Booster Fees Payment #1	1	25.00	25.00	<input checked="" type="checkbox"/>

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

- Pull up athlete's account. Click on  . Then click  .
- Your screen should look something like the image below. Click on  .

Manage Household Information

2016

Show only transactions with a balance
  Show payment plan/invoice transactions
  Include Household

Newest first
  Show voided transactions

Viewing 0 - 5 of 5 Receipts

Rcpt #	Date	Facility	Amt Due	Amt Paid	Pmt Type	Balance
#117237	September 20, 2015, 12:46 pm	AC Front Desk 2	\$275.00	\$25.00	CC	\$0.00
	- (CCNW02) AC Capital Crew Novice Women		\$0.00	\$0.00		\$0.00
	-- Participant: Hedrick, Chloe					
	- AC Capital Crew Novice Women Payment #1		\$25.00	\$25.00	VISA	\$0.00
	-- Original Transaction: #117237					
	-- Participant: Hedrick, Chloe					
	- AC Capital Crew Novice Women Payment #2		\$250.00	\$0.00		\$0.00
	-- Original Transaction: #117237					
	-- Participant: Hedrick, Chloe					
#119811	October 5, 2015, 4:02 am	AC Internet	\$250.00	\$250.00	CC	\$0.00
	- AC Capital Crew Novice Women Payment #2		\$250.00	\$250.00	CC	\$0.00
	-- Original Transaction: #117237					
	-- Participant: Hedrick, Chloe					
#124032	November 5, 2015, 4:03 am	AC Internet	\$125.00	\$125.00	CC	\$0.00
	- AC Capital Crew Novice Women Payment #3		\$125.00	\$125.00	CC	\$0.00
	-- Original Transaction: #117237					
	-- Participant: Hedrick, Chloe					
#126474	December 5, 2015, 4:03 am	AC Internet	\$125.00	\$125.00	CC	\$0.00
	- AC Capital Crew Novice Women Payment #4		\$125.00	\$125.00	CC	\$0.00
	-- Original Transaction: #117237					
	-- Participant: Hedrick, Chloe					
#127978	January 10, 2016, 7:19 am	AC Front Desk 1	\$150.00	\$150.00	CC	\$0.00
	- (CCNW01) AC Capital Crew Novice Women		\$0.00	\$0.00		\$0.00
	-- Participant: Hedrick, Chloe					
	- AC Capital Crew Novice Women Payment #1		\$150.00	\$150.00	VISA	\$0.00
	-- Original Transaction: #117237					
	-- Participant: Hedrick, Chloe					

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.

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

Manage Household Information

Include Household
  Only Due Payment Plans

#	Send	Due	Late	Status	Fee	Paid	Due	Profile ID
PROGRAM								
Chloe Hedrick								
▼	EFT   (CCNW02) AC Capital Crew Novice Women				525.00	525.00	0.00	
1	09/20/2015	09/20/2015	09/20/2015	PAID	25.00	25.00	0.00	45466
2	10/05/2015	10/05/2015	10/05/2015	PAID	250.00	250.00	0.00	45466
3	11/05/2015	11/05/2015	11/05/2015	PAID	125.00	125.00	0.00	45466
4	12/05/2015	12/05/2015	12/05/2015	PAID	125.00	125.00	0.00	45466
▼	EFT   (CCNW01) AC Capital Crew Novice Women				525.00	150.00	375.00	
1	00/00/0000	00/00/0000	00/00/0000	PAID	150.00	150.00	0.00	47344
2	02/01/2016	02/05/2016	02/05/2016	NOT PAID	150.00	0.00	150.00	47344
3	03/01/2016	03/05/2016	03/05/2016	NOT PAID	150.00	0.00	150.00	47344
4	04/01/2016	04/05/2016	04/05/2016	NOT PAID	75.00	0.00	75.00	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.

Participant:	Programs	Memberships	Reservations	Items	Rentals
2435922850	Name: Test, Johnny	Program: BANQUET	Name: AC Capital Crew Banquet	Discount: 0.00	Fee: 0.00
				Package(s) Fee: 0.00	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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...

Description	User	QTY	Price
BANQUET - AC Capital Crew Banquet	Test, Jimmy	1	0.00
ABM - Athlete Booster Member	Test, Jimmy	1	0.00
BANQUET - AC Capital Crew Banquet	Test, Heather	1	0.00
ADBM - Adults Booster Member	Test, Heather	1	34.00
BANQUET - AC Capital Crew Banquet	Test, Tim	1	0.00
ADBM - Adults Booster Member	Test, Tim	1	34.00

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.

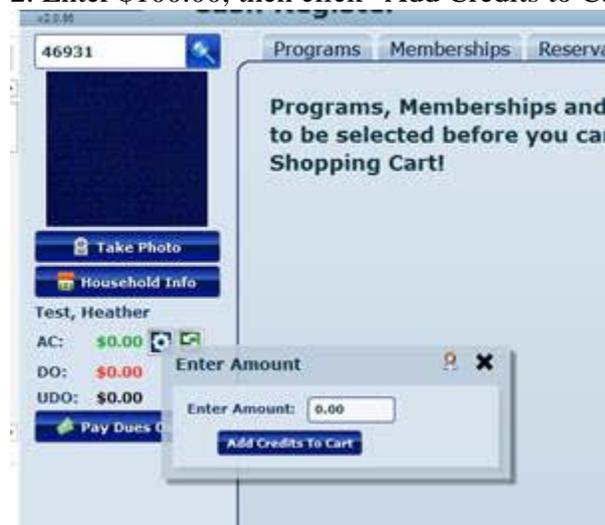
**ERG SALES**

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.

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.**

## OPENING/CLOSING PROCEDURES

### CLOSING REPORTS

At the end of your shift print a closing summary report

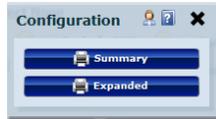
At the end of the night print a closing expanded report for each drawer, a closing summary report for (FD1, FD2, FD3, FD4, Office & Office Manager), a payment method report- credit card for (FD1, FD2, FD3, FD4, Office & Office Manager)

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



## 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 

Payment Method Reports:

Logins:  No Admin  
 Aguilar, Alejandro  
 Alvarado, Mikaela  
 Amos, Amanda  
 Amos, Ashley  
 Andersen, Mason  
 Anderson, Sarah  
 Ashman, Sterling

Facilities:  No facility  
 AC Administrative - AC Front Desk 1  
 AC Administrative - AC Front Desk 2  
 AC Administrative - AC Front Desk 3  
 AC Administrative - AC Front Desk 4  
 AC Administrative - AC Internet  
 AC Administrative - AC Kiosk 1  
 AC Administrative - AC Kiosk 2

Ledger Numbers:  0 - No Ledger Specified  
 0-0-0-0-0 - Default  
 1-00010-00000-00000-0...  
 1-00020-00000-00000-0...  
 1-00020-16-0301-00000 ...  
 1-00021-18-00000-0000...  
 1-00022-00000-00000-0...  
 1-00040-16-00000-0000...

Select All Select None    Select All Select None    Select All Select None

Payment Method:     Start Date:     End Date:      Include EFTs     Include Internet  
 Only EFTs     Only Internet

## 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.

Select Payer

User Code:     Receipt #:     Phone #:     Corporate Account Name:  X

Last Name:     First Name:     Email:     Gateway Transaction ID:

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

	Code	Name	DOB	Phone #	Mailing Address
<input checked="" type="checkbox"/>	8362392503	Callaghan, Chris San Diego Rowing Club	N/A	(858)352-8380	PO Box 99856 San Diego, CA 92109

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

Select Household

This user belongs to more than one household or corporate account. Please select which household/corporate account you wish to use below.

PO Box 99856

San Diego Rowing Club

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

Option Name	QTY	Price
10x10 Tent Rental	1	550.00
20x20 Tent	1	425.00
4+ Boat Rental	1	100.00
20x40 Tent	1	850.00
BBQ Rental	1	125.00
Extra Chair Rental	1	1.50
Extra Table Rental	1	10.00

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

Option Name	QTY	Price
<input checked="" type="checkbox"/> 10x10 Tent Rental	1	550.00

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.

<input checked="" type="checkbox"/> Extra Chair Rental	20	1.50
<input checked="" type="checkbox"/> Extra Table Rental	5	10.00

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

Participant: 8362392503  
 Name: Callaghan, Chris  
 Program: WIRA  
 Name: AC Western Intercolleg...  
 Discount: 0.00  
 Fee: 0.00  
 Package(s) Fee: 630.00

Total: \$630.00 **Add**

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