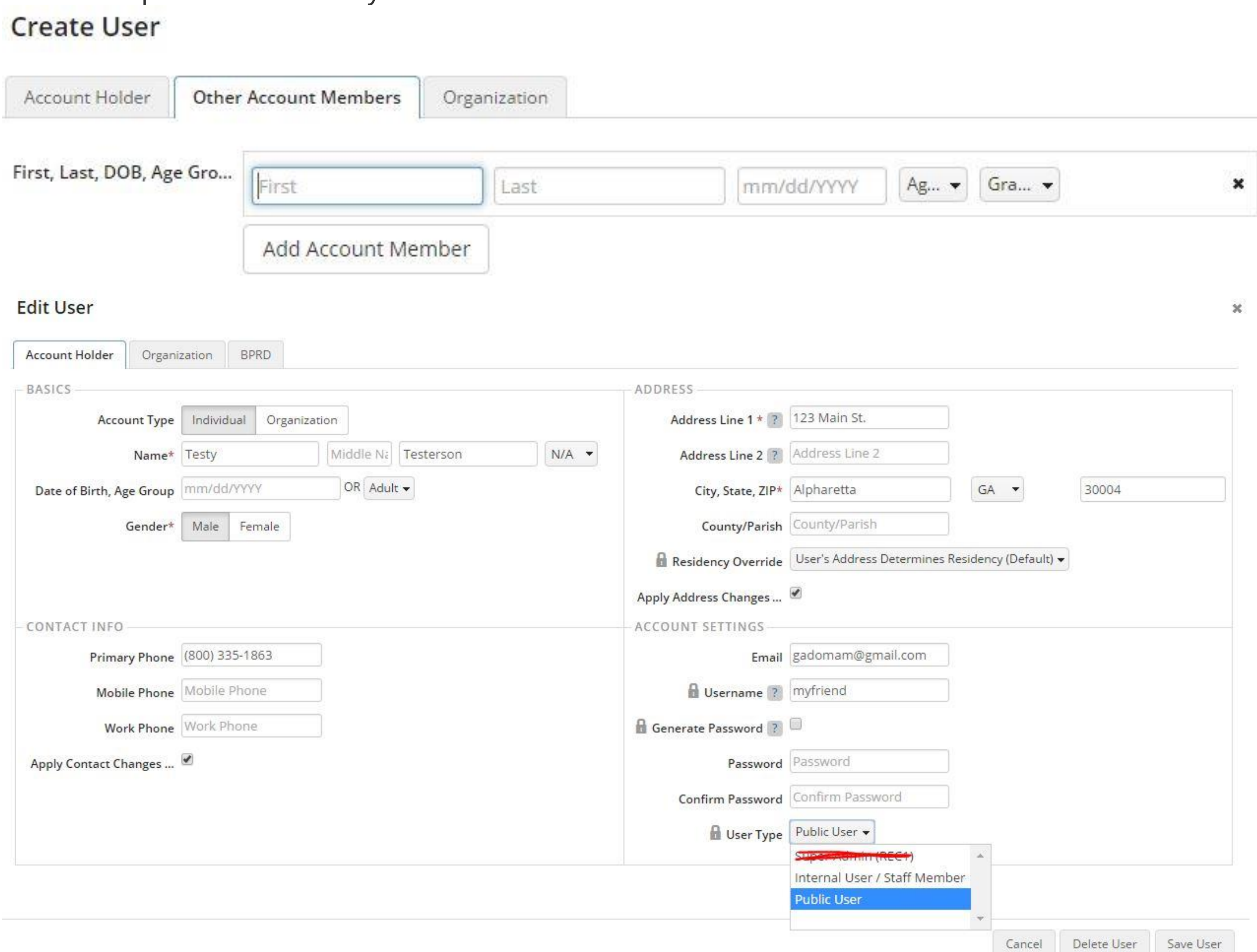
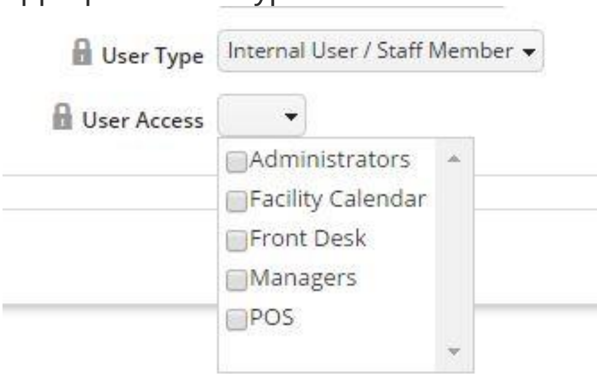
Creating an Account:

1. To create an account select "Accounts" on your left.
2. Click on Create an Account to the right of the search bar.

3. Each account is to a unique email address.
    - **Note:** Email is required to be entered when creating an account from the public side. Internally it can be skipped but keep in mind it does make it easier for the public to go back and login. Remind them, contact preferences for Organization Emails can be edited/removed as desired. Example email for those without one: FirstLast@noemail.com
4. Enter in required data and any additional account members.



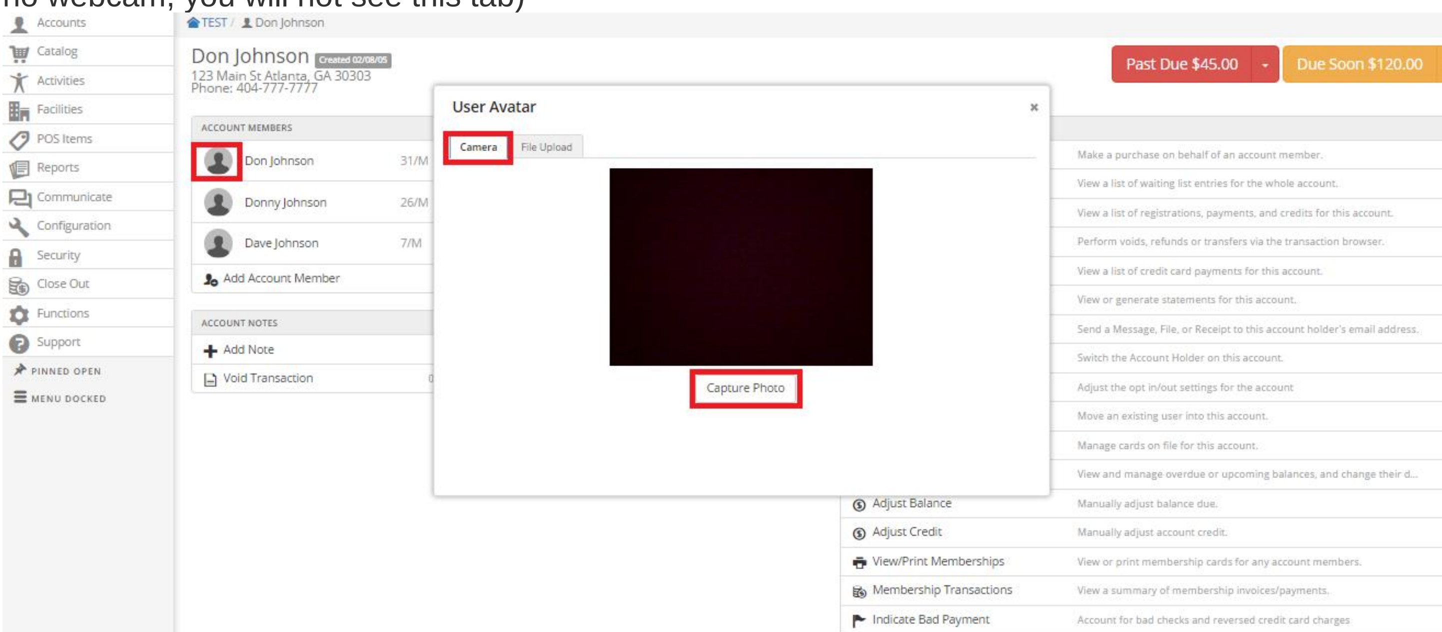
5. For public users - keep permissions assigned as public user. For staff members - select the appropriate user type.



6.

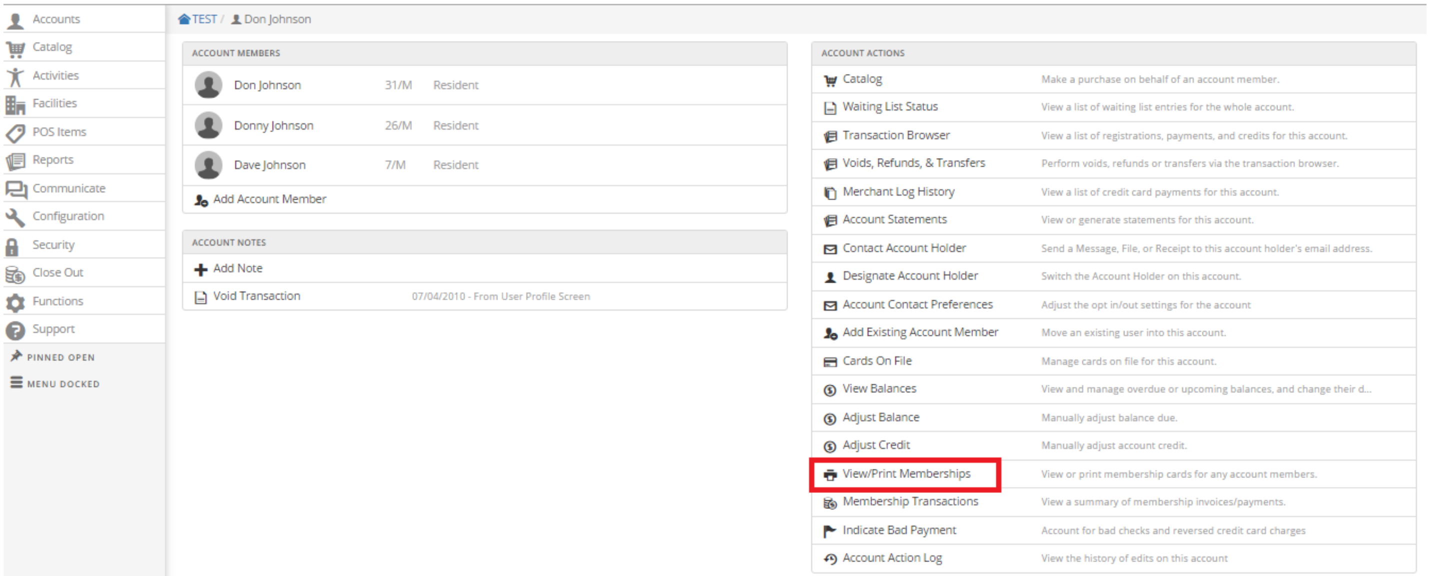
Printing a Membership Card:

1. First, you will need to take the photo! Navigate to Accounts> search for and select the user you would like to update.
2. Then, click this  icon next to the appropriate account member.
3. Once you are in that User Avatar pop-up window, there will be a "Camera" tab. As long as you have a webcam attached to the computer, you will be able to click Capture Photo. (If there is no webcam, you will not see this tab)

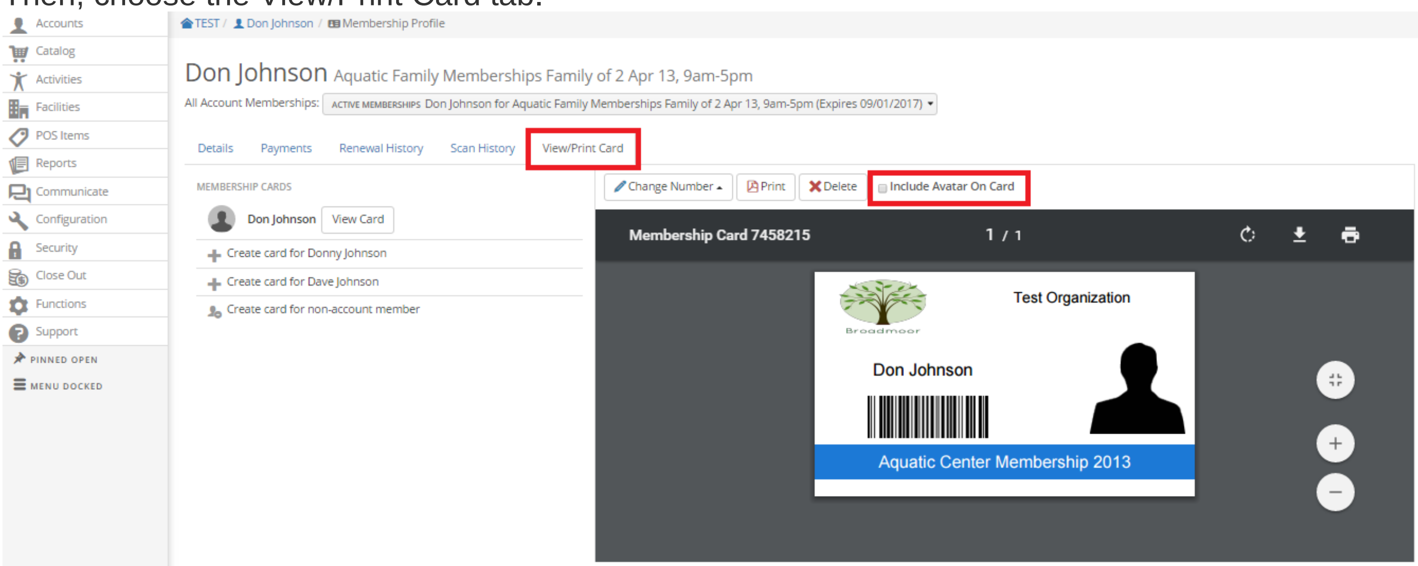


4. You may also upload an existing photo from your computer, by using the File Upload tab.
5. Now that you have taken a photo and associated it with this user, you can now use this photo on the membership card!

6. Next, while in the same user account, select View/Print Memberships in the right hand column, near the bottom.



7. Then, choose the View/Print Card tab.



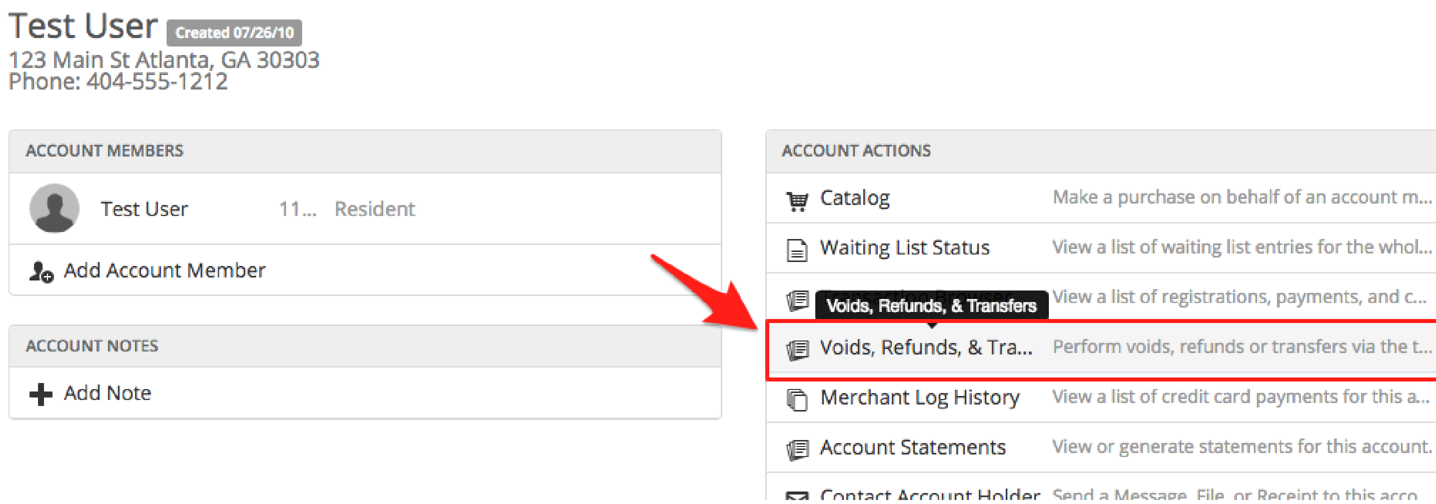
8. Select "Include Avatar on Card."
9. You are all set!

Performing a Transfer

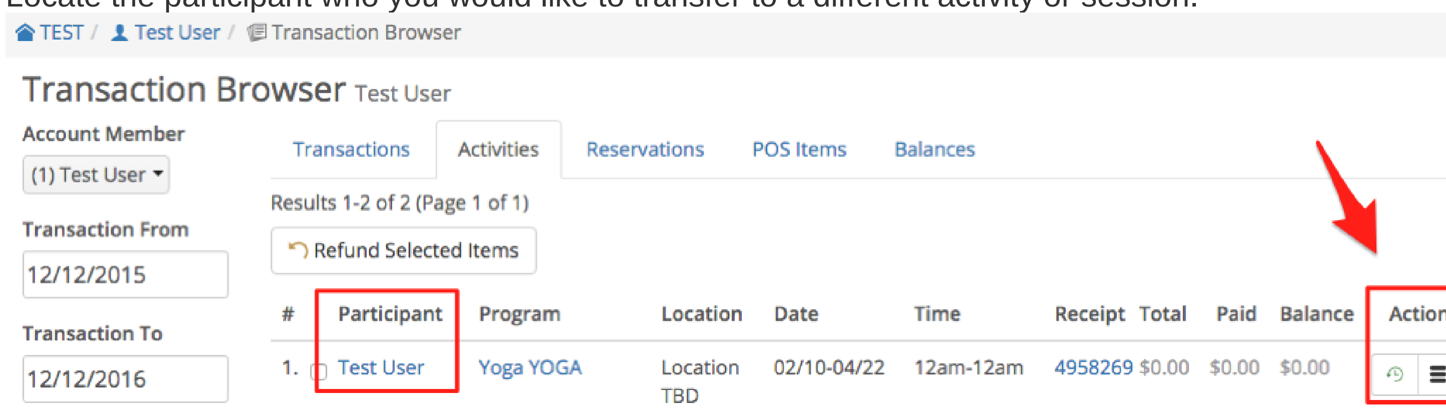
You will want to open the users account who you would like to perform the transfer for by navigating to accounts, and typing in the user's name, username or email.

Once you have opened the users account you can then complete the following steps to perform the transfer:

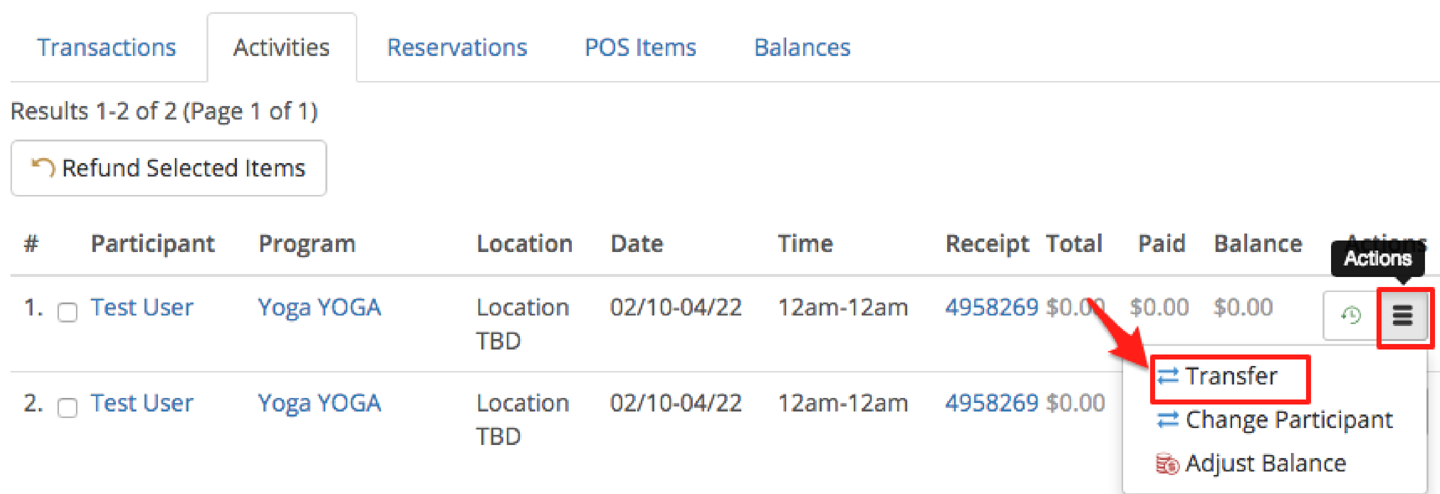
1. Navigate to the user's profile and select 'voids, transfers, and refunds'



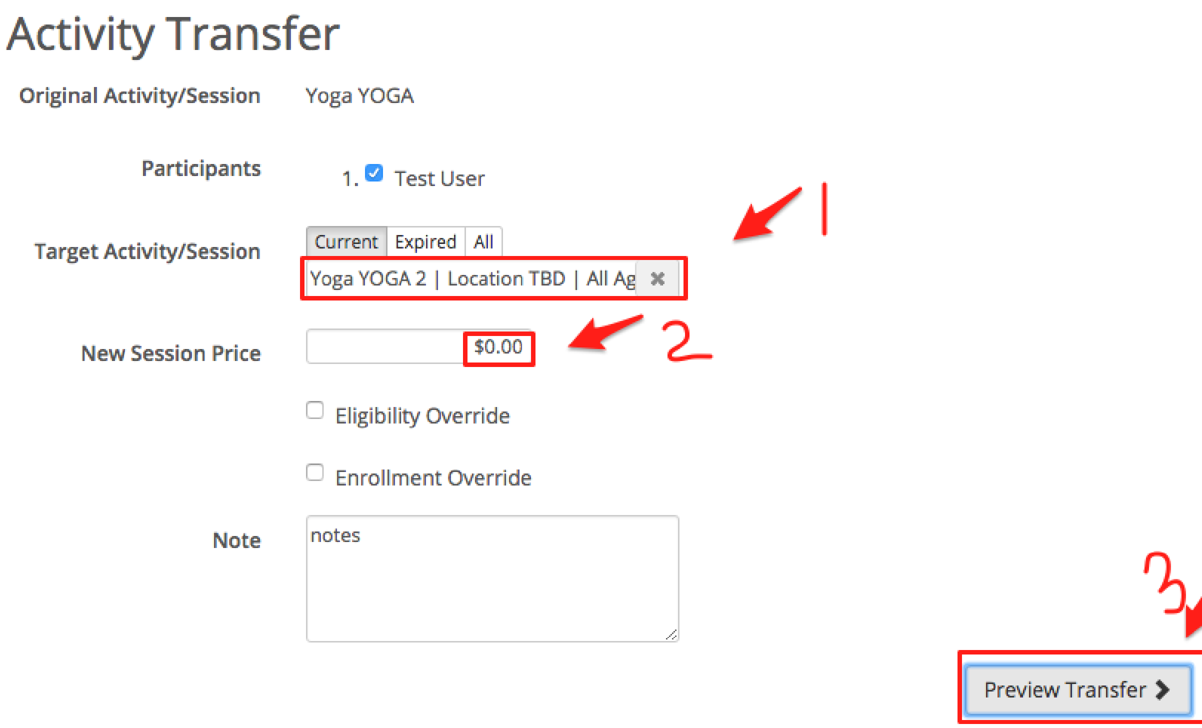
2. Locate the participant who you would like to transfer to a different activity or session.



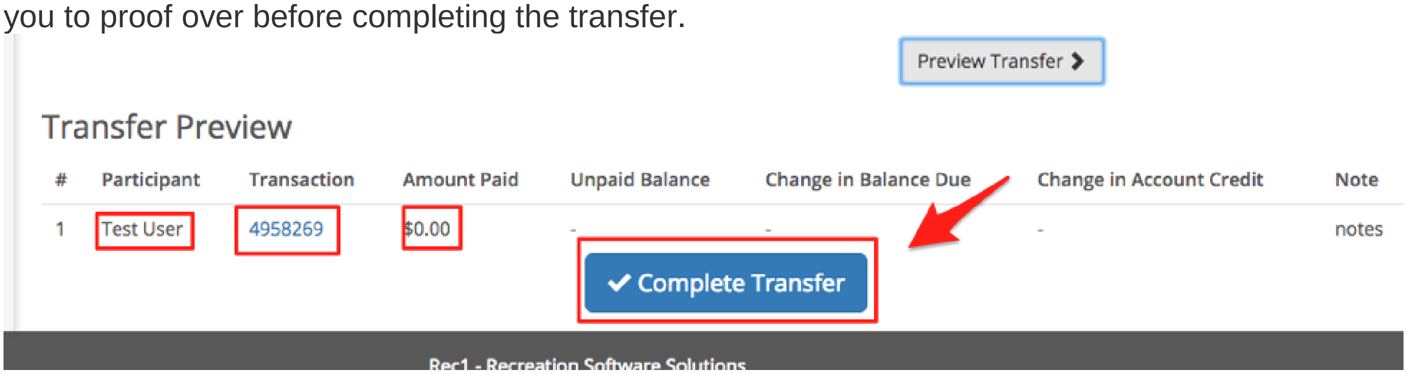
3. Select the action tab on the far right hand side, and a drop down will populate where you can select transfer.



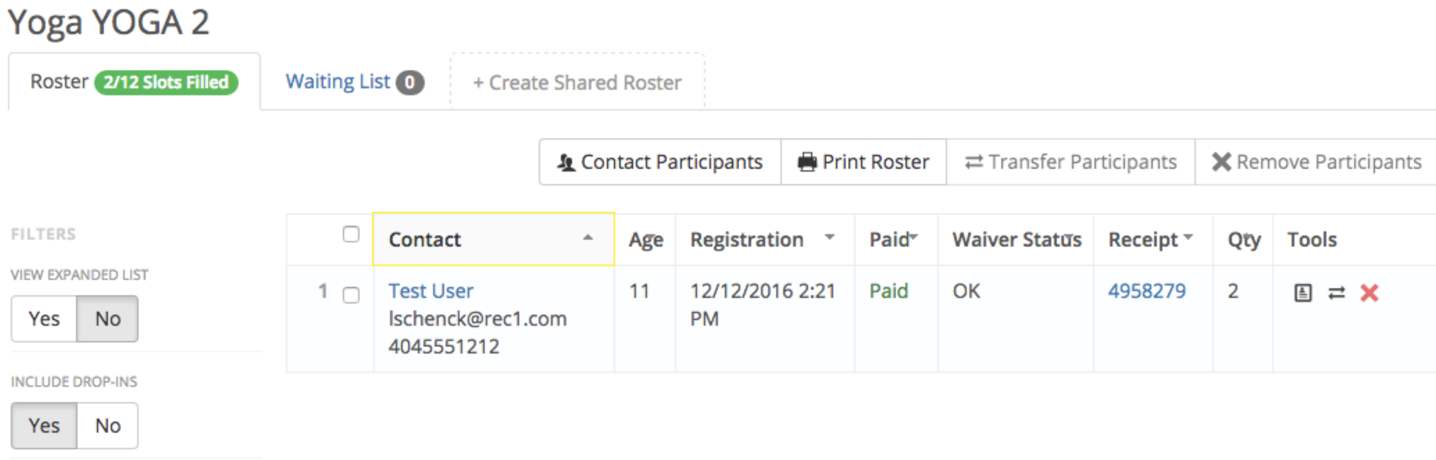
4. The activity transfer page will populate, and from there you will begin to type the new section that the participant will be transferred into.



5. Input new price if applies.
6. Eligibility Override - This would be applied if the participant does not fit the eligibility of the new activity, (example: by age)
7. Enrollment Override - This is used when a session of the activity which the participant is being transferred into is full, or if the enrollment time has passed and you would like to transfer the participant after the fact.
8. Notes can be applied in the notes field if any are needed during the transfer.
9. Select Preview Transfer, and at the bottom of the screen the transfer summary will populate for you to proof over before completing the transfer.



10. After proofing you can select complete transfer, and the roster will populate for which the participant has been transferred into.



Performing a Refund:

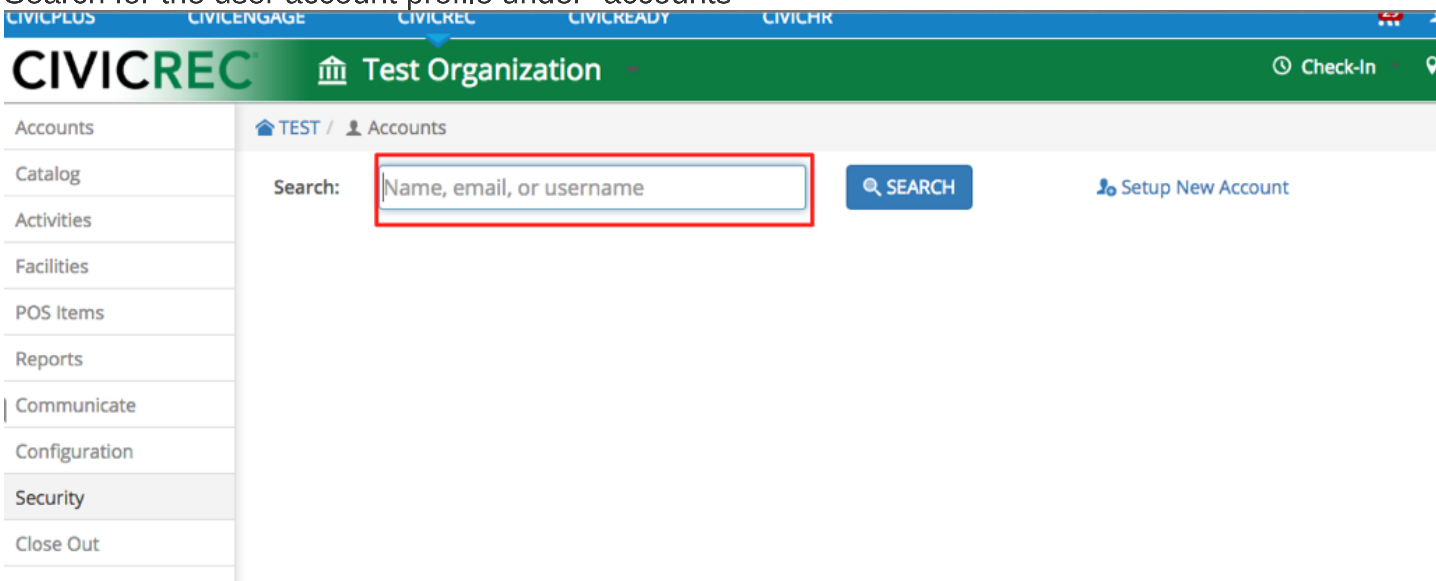
Important Note about Credit Card Refunds

For refunds for transactions where the original transaction involved the processing of a credit card online, Refunds cannot be issued until the next day of business. Credit Card transactions do not "settle" until midnight on the day of the transaction, so they cannot be credited until the next day. The only option on the same day of a credit card transaction is to VOID the transaction entirely. This will prevent the charge from hitting the person's credit card.

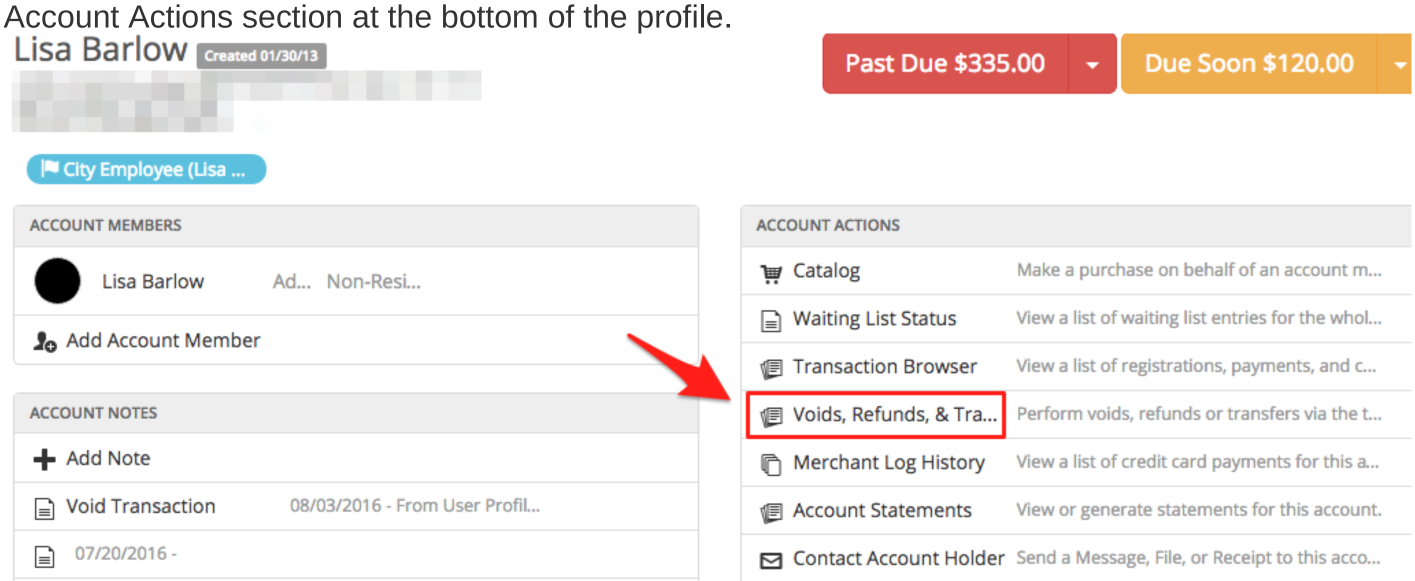
Instructions

Steps for Issuing a Transaction Refund/Credit:

1. Search for the user account profile under "accounts"

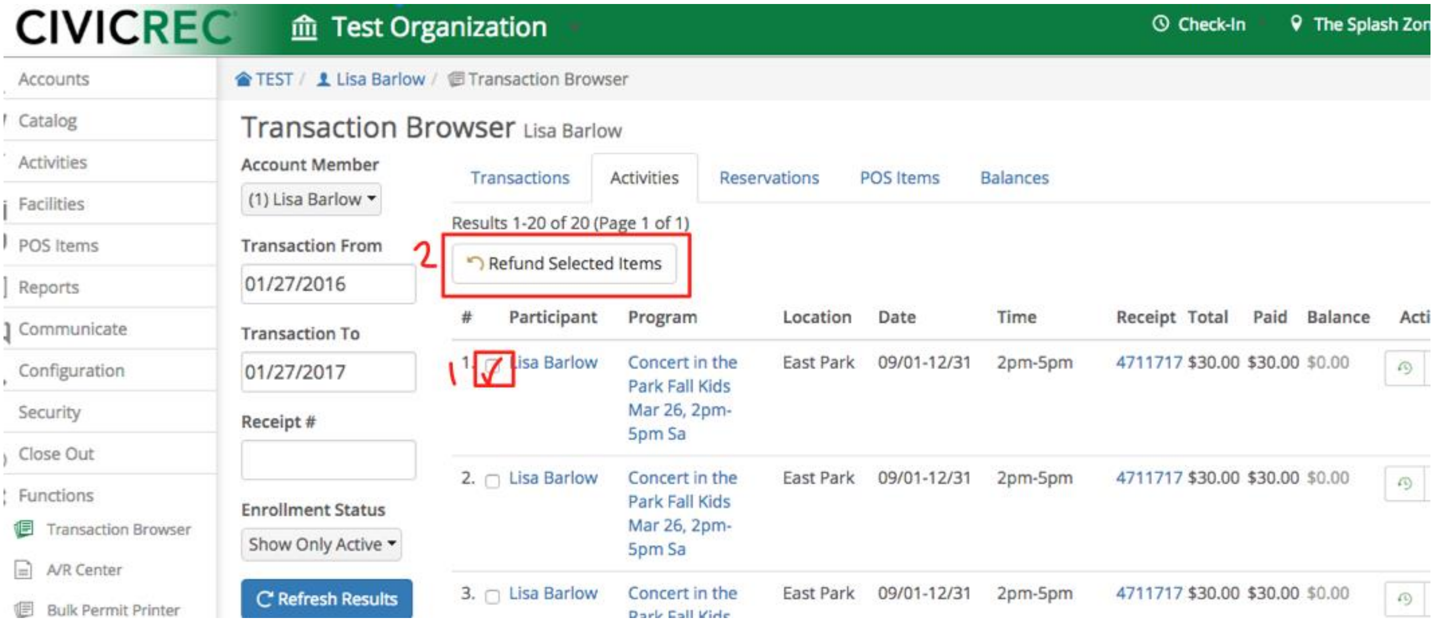


2. Upon entering the user's profile, click on the button that says "Voids/Refund/Transfers" in the Account Actions section at the bottom of the profile.

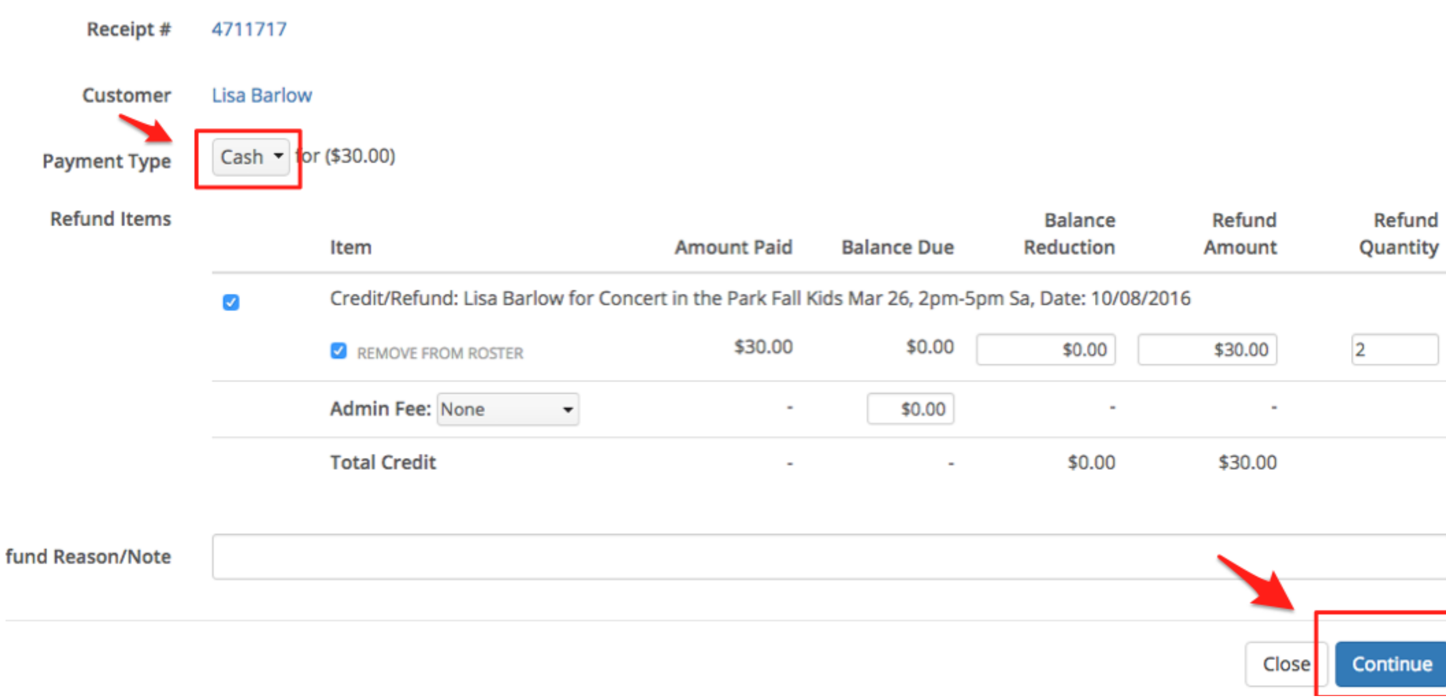


3. You will be taken to a screen that will show the prior transactions for the user's account. Click on the activities or facilities tab (whichever the transaction should be under) select refund next

to the transaction.

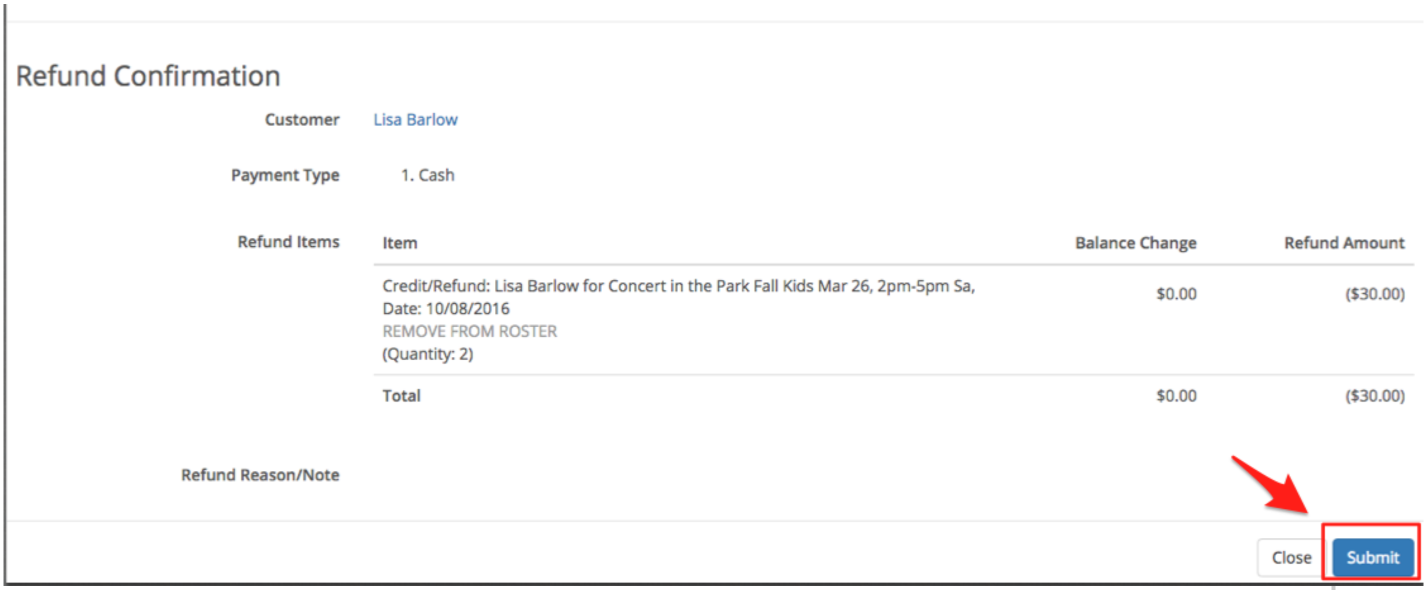


4. Select the method (i.e. payment type) you wish to issue the refund in (or select User Credit to issue a credit that can be used on a later registration.). You can credit back to any handling method.
   Note: As mentioned above, issuing a refund back to a credit card is not possible on the SAME day as the original transaction. Additionally, it is important to note that most merchants will only allow for credit card refunds prior to 120 days.



5. Indicate any amounts and adjustments and indicate the refund payment type.
6. NOTE: If you want to remove the person from the activity while issuing the credit, ensure that the check the box that says "Remove from Activity" is selected. If you leave that box unchecked, the refund/credit will be issued, but the person will be left on the roster. (Facility rentals can be left intact in this same way)
7. Optional: Add a comment to indicate the reason for the Refund/Credit

8. Click the "submit" button.



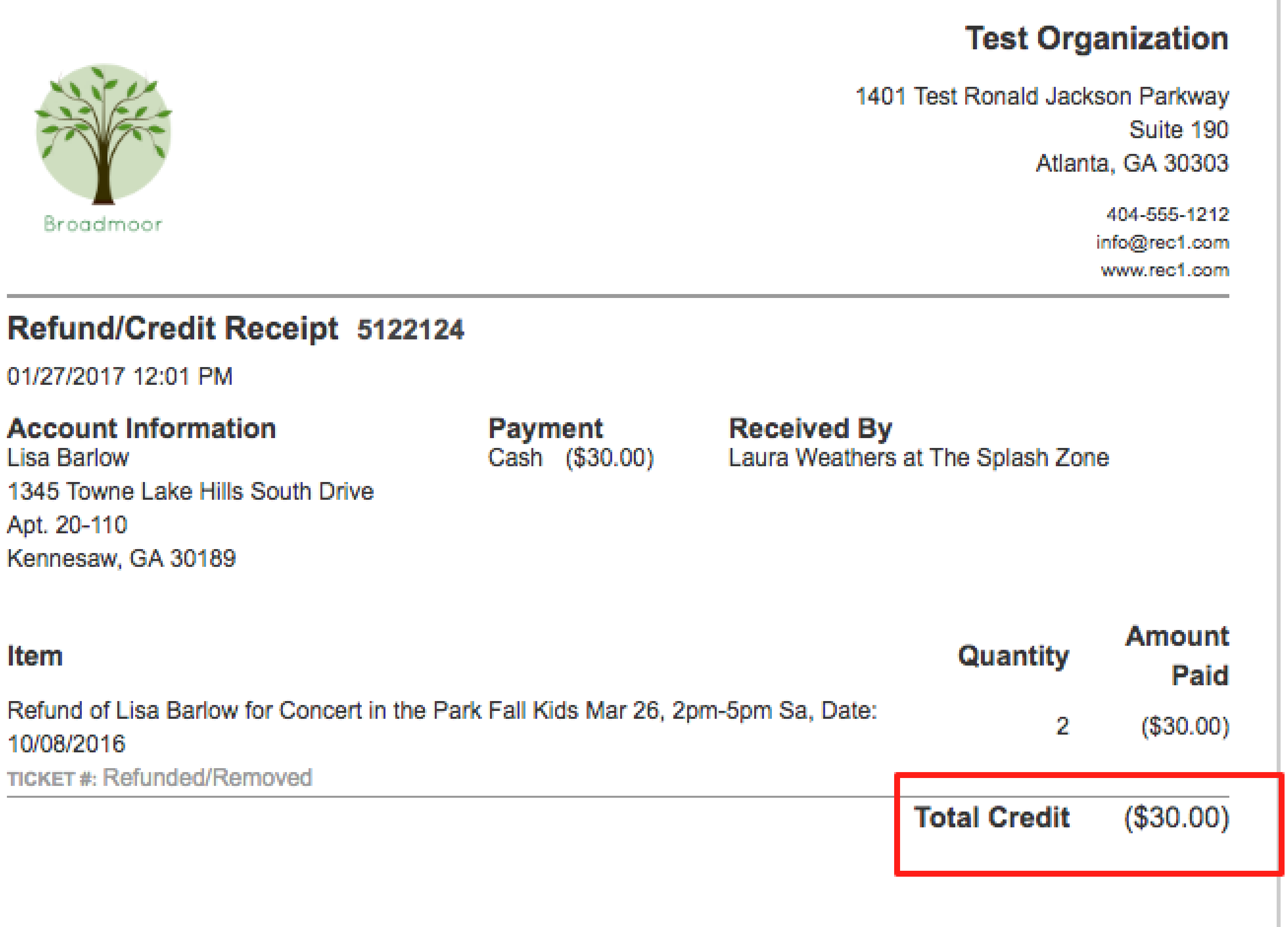
Refund Confirmation

Customer	Lisa Barlow
Payment Type	1. Cash
Refund Items	

Item	Balance Change	Refund Amount
Credit/Refund: Lisa Barlow for Concert in the Park Fall Kids Mar 26, 2pm-5pm Sa, Date: 10/08/2016 REMOVE FROM ROSTER (Quantity: 2)	$0.00	($30.00)
Total	$0.00	($30.00)

Refund Reason/Note

Close Submit



Broadmoor

Test Organization

1401 Test Ronald Jackson Parkway
Suite 190
Atlanta, GA 30303

404-555-1212
info@rec1.com
www.rec1.com

Refund/Credit Receipt 5122124

01/27/2017 12:01 PM

Account Information
Lisa Barlow
1345 Towne Lake Hills South Drive
Apt. 20-110
Kennesaw, GA 30189

Payment
Cash ($30.00)

Received By
Laura Weathers at The Splash Zone

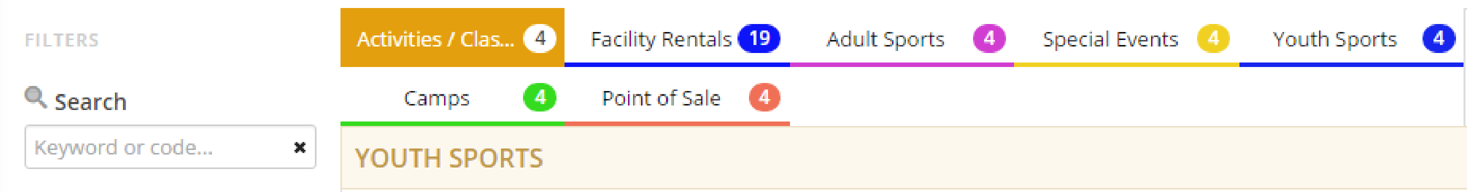
Item	Quantity	Amount Paid
Refund of Lisa Barlow for Concert in the Park Fall Kids Mar 26, 2pm-5pm Sa, Date: 10/08/2016 TICKET #: Refunded/Removed	2	($30.00)
	Total Credit	**($30.00)**

Processing a Transaction

When processing a transaction from the Catalog, be sure the user has an account (if needed). To create an account, see [Create an account](#).

If the user already has an account, simply click on 

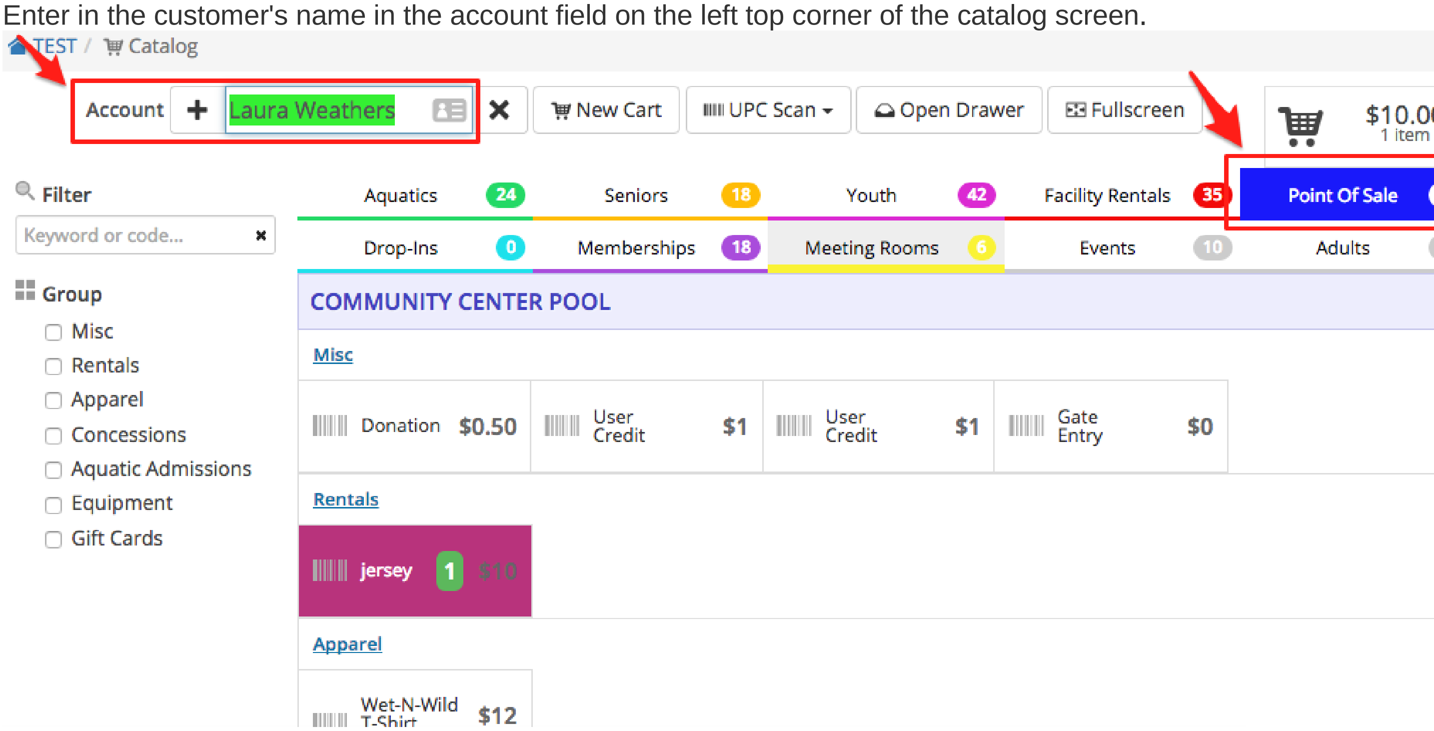
and type in the users first or last name.



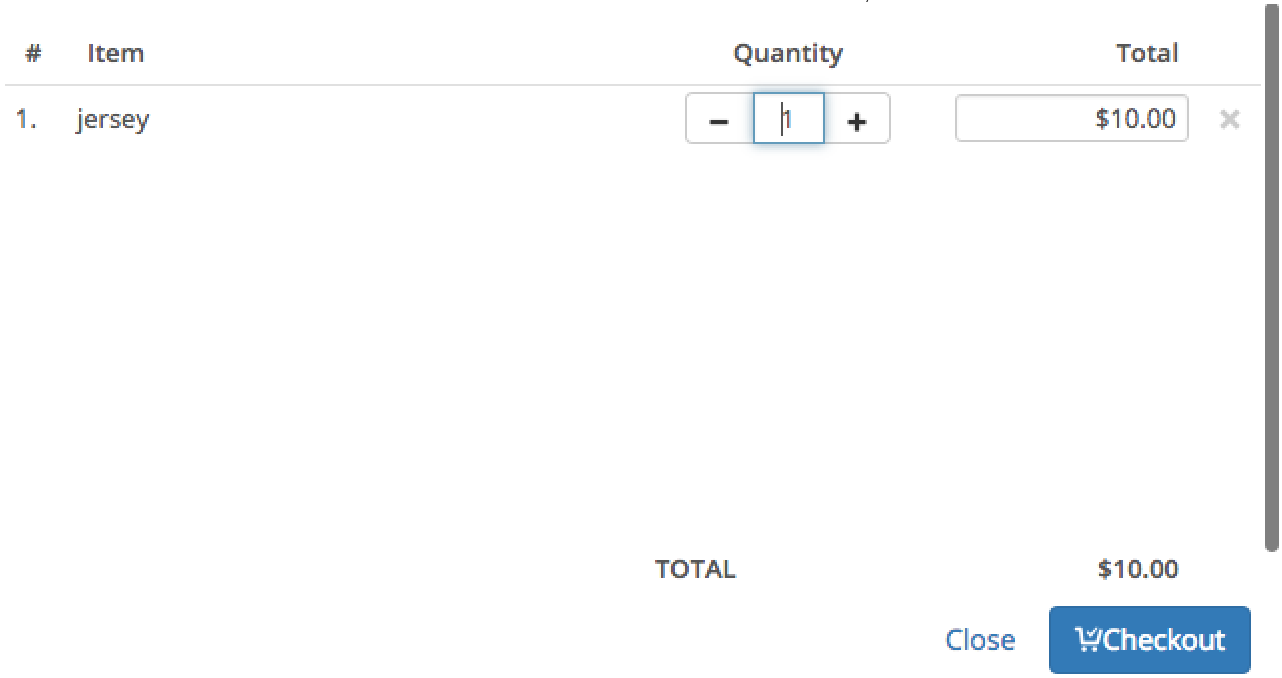
POS

To find the activity you can use the search and filters on the left side. You can also click on the tabs to find the appropriate item the customer is registering for. Then add items to the cart. Check out or close and add any additional items.

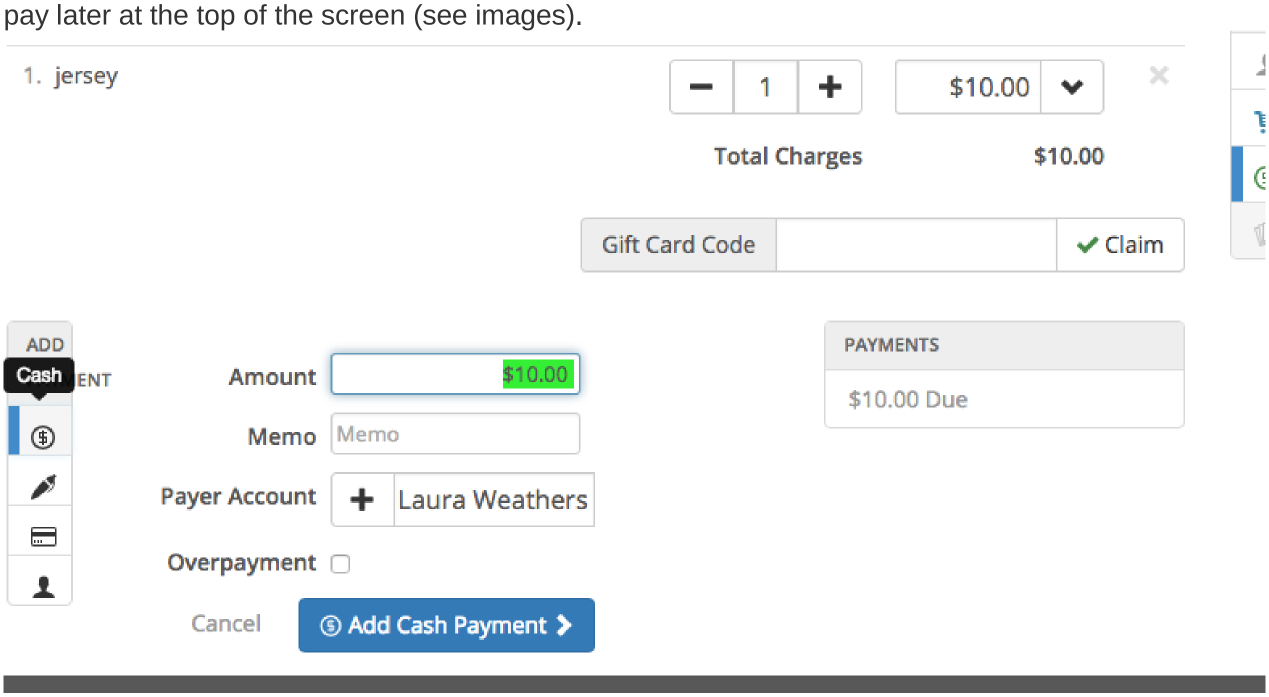
1. After you have configured your POS item you can then go to the catalog> POS tab.
2. Enter in the customer's name in the account field on the left top corner of the catalog screen.



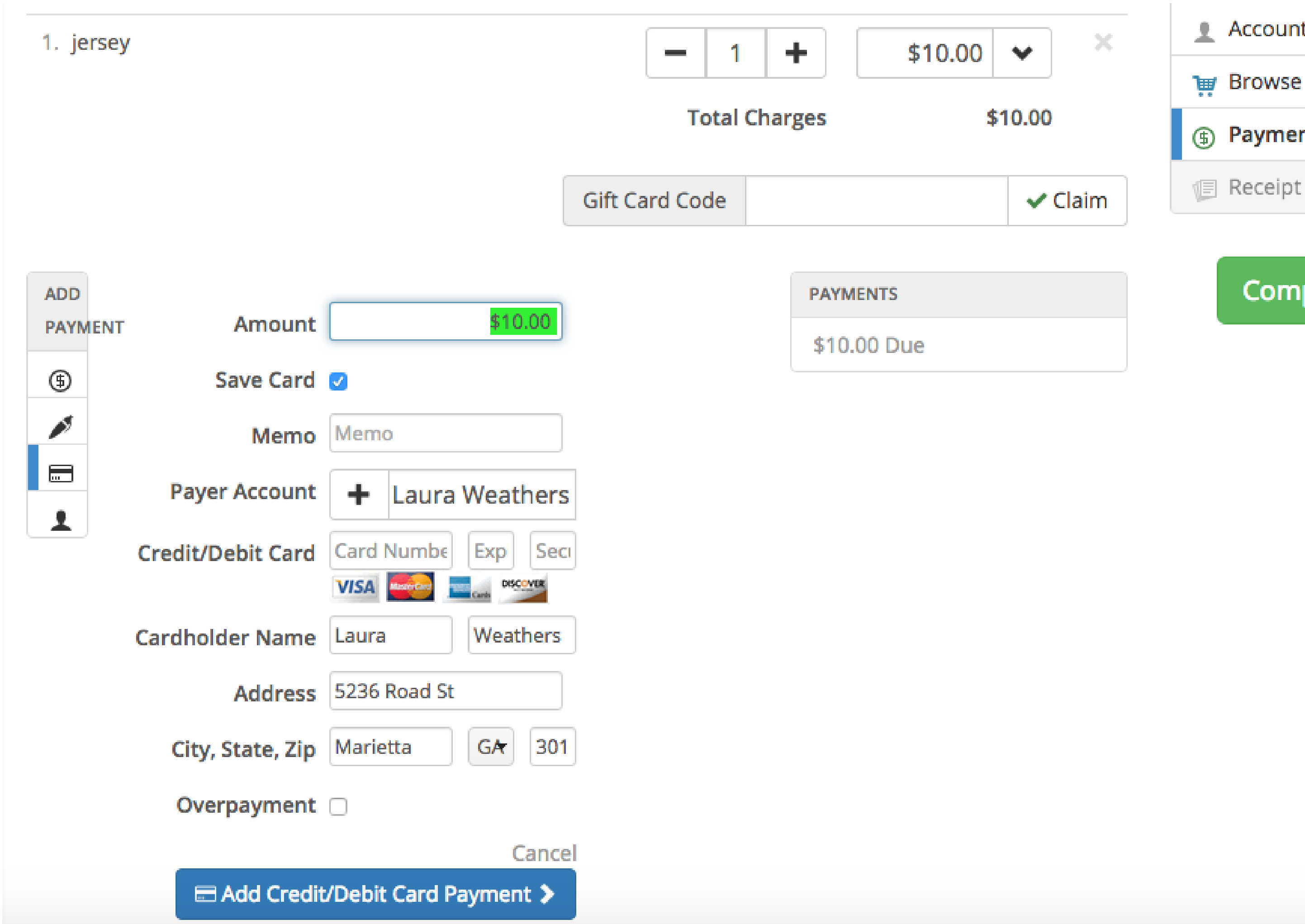
3. Select the POS item that needs to be added to the customer's account, and click checkout.



4. Enter payment type if the customer has given you the type of payment they will be using, or you can set as pay later at the top of the screen (see images).



5.

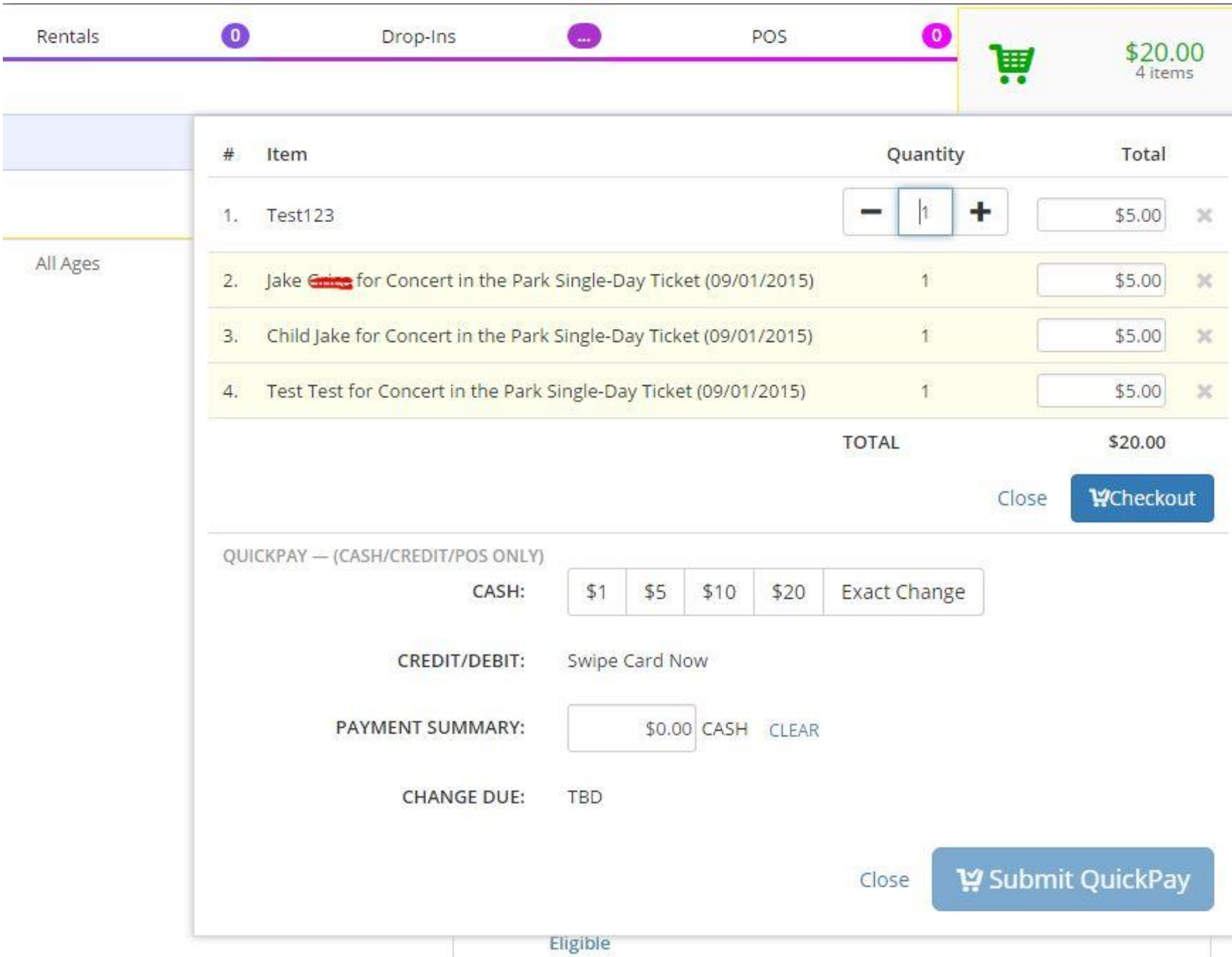

1. jersey
1
$10.00
Total Charges
$10.00
Gift Card Code
Claim
Account
Browse
Paymer
Receipt
Comp
ADD PAYMENT
Amount
$10.00
Save Card
Memo
Memo
Payer Account
Laura Weathers
Credit/Debit Card
Card Numbe
Exp
Secı
Cardholder Name
Laura
Weathers
Address
5236 Road St
City, State, Zip
Marietta
GA
301
Overpayment
Cancel
Add Credit/Debit Card Payment
PAYMENTS
$10.00 Due

Quickpay

The Quickpay feature for checkout, allows for rapid-fire transactions to be done through the Catalog one after another.

This feature is available for transactions that do not require other steps such as prompts, waivers or forms during the checkout process including registrations, drop in's and point of sale purchases.

Simply add the items to the cart and enter in payment.

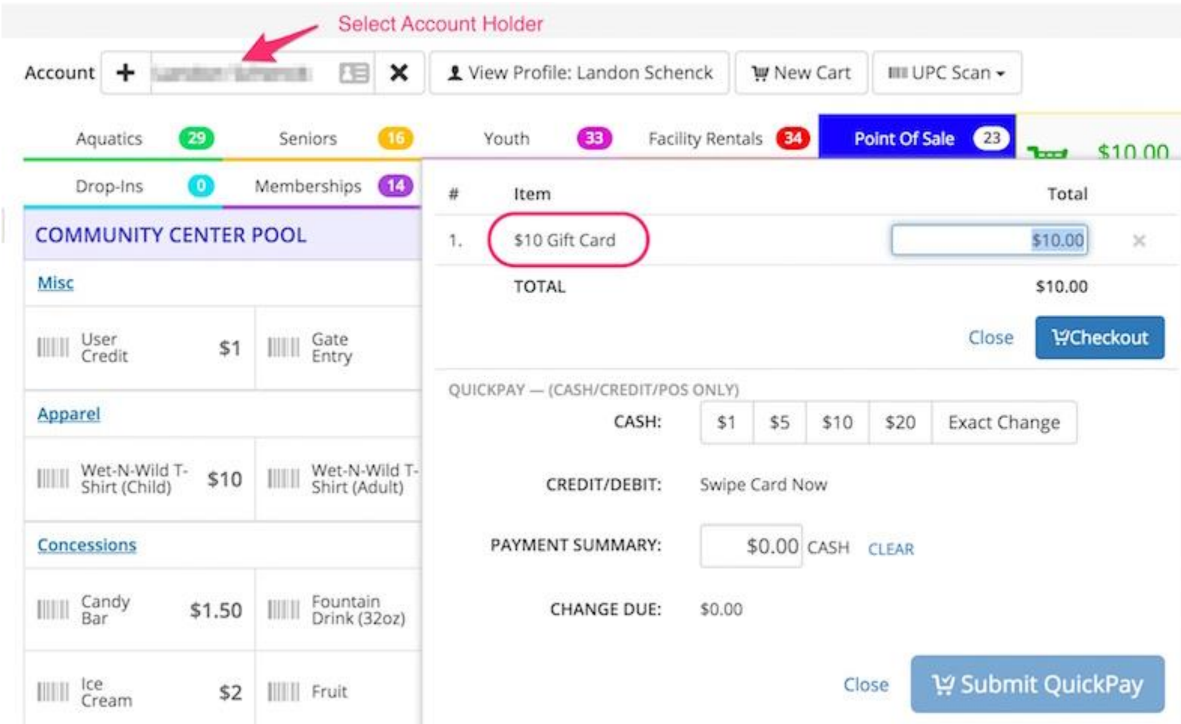


Print a receipt and enter in another transaction.

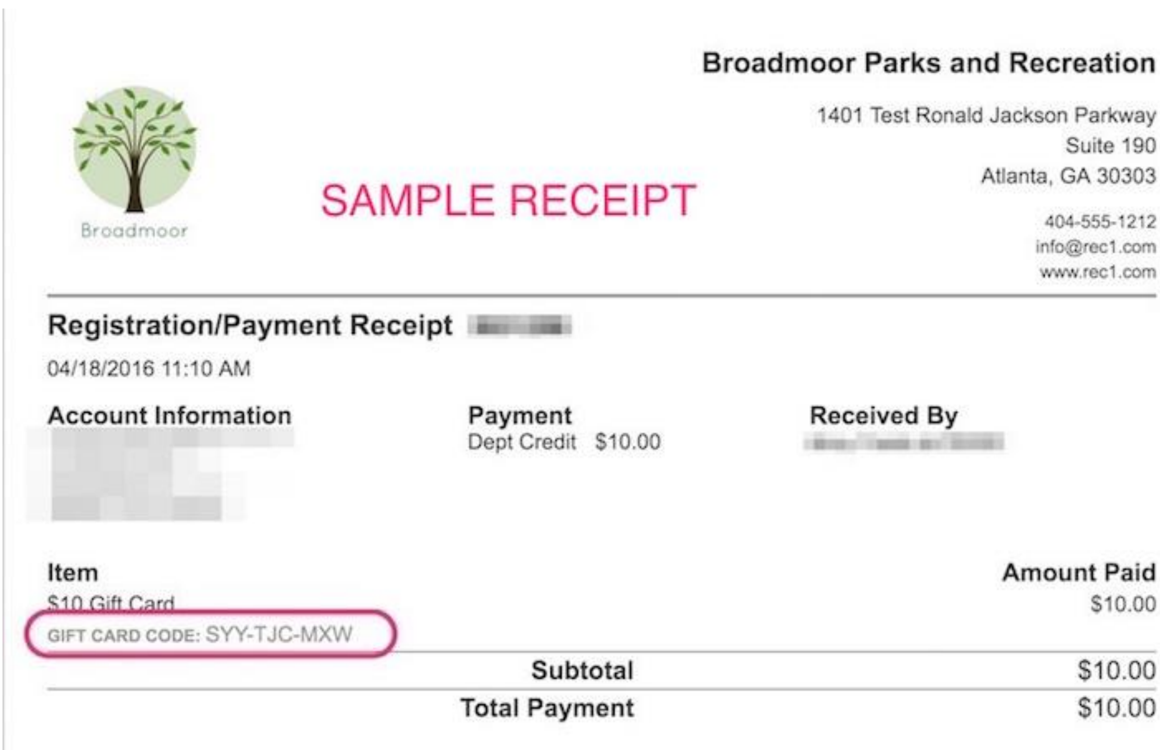
Enjoy speedy checkout.

Selling & Redeeming Gift Certificates

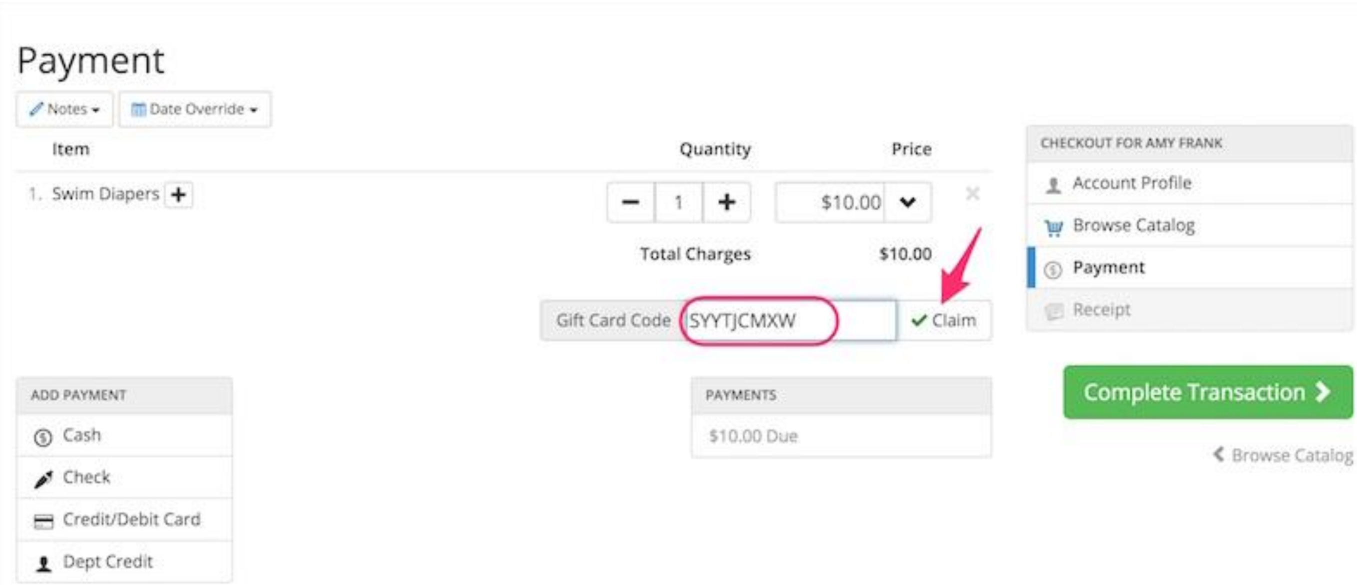
- Gift cards/certificates are available through our Point of Sale Module.
- **IMPORTANT:** You must select an account holder to assign the transaction



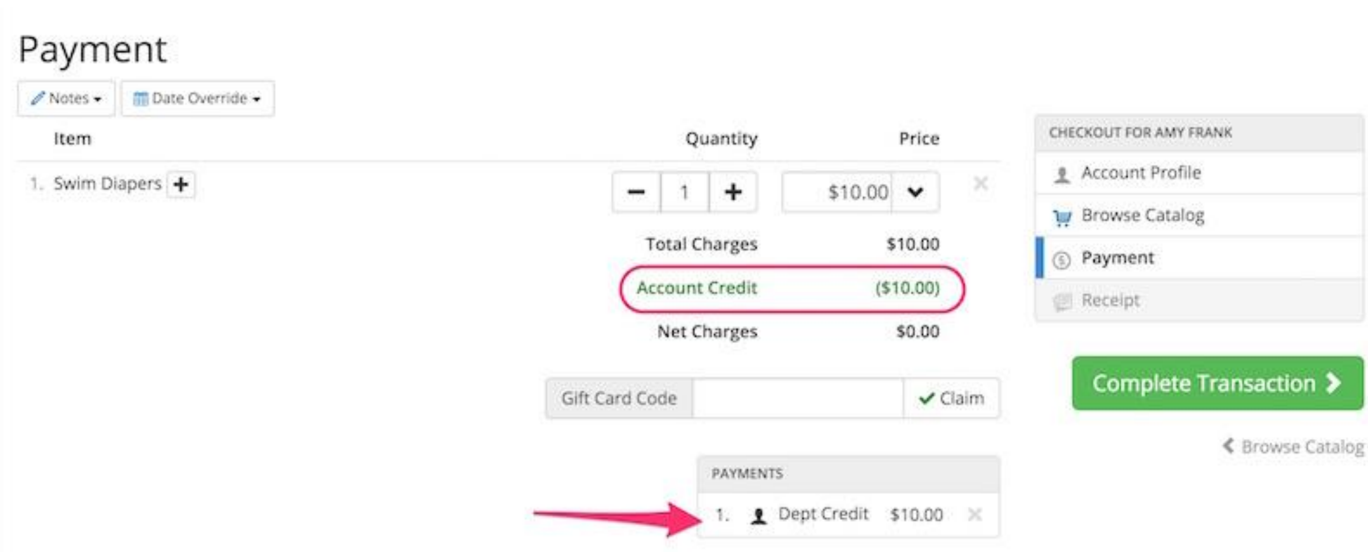
- Once you sell a gift certificate, it will generate a unique gift card code, visible on the receipt, which can be claimed by another user during checkout.



- To redeem the code, enter the code at the final checkout screen and select 'Claim' beside the code. (**Note**: Code may be entered with or without the dashes)
- Selecting 'Claim' will put a credit in the amount of the gift certificate code on the user's account balance.

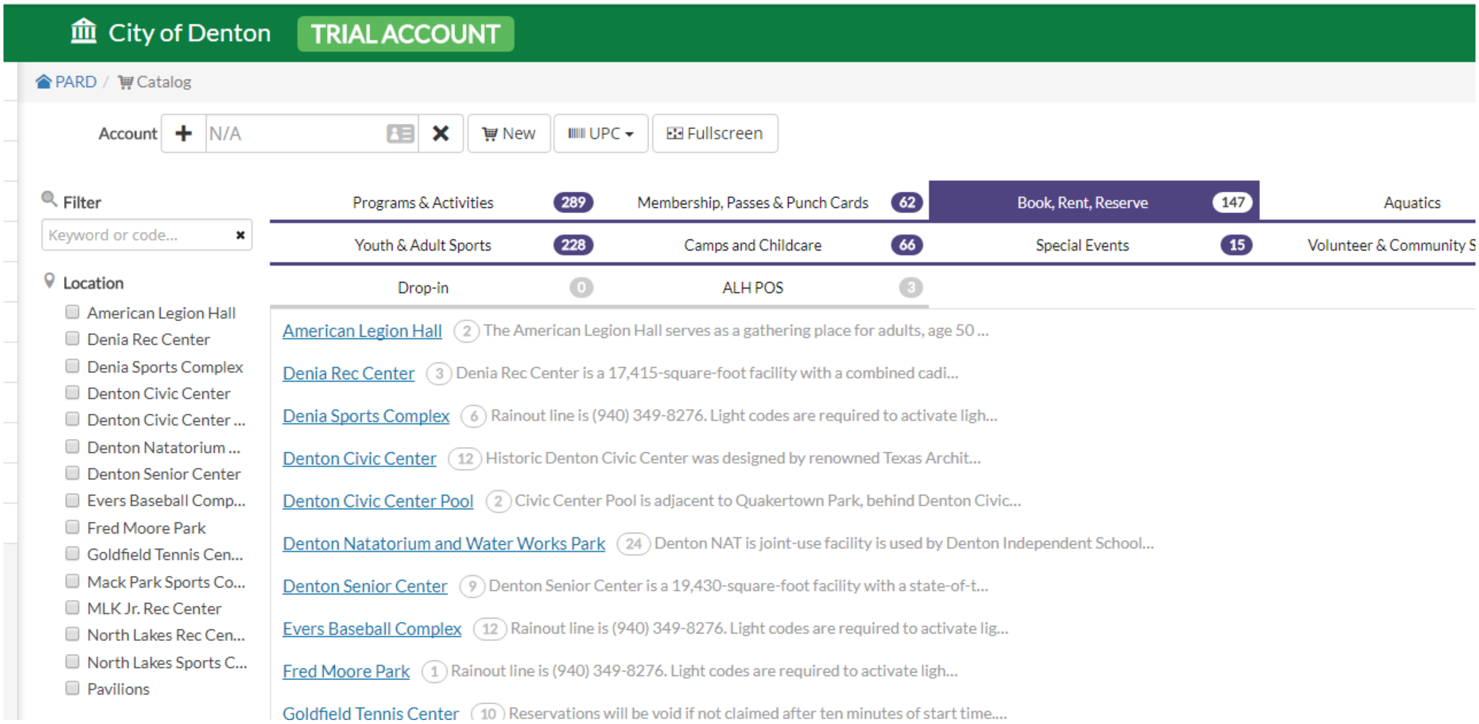


- The user credit can then be applied as a payment in this transaction or may be saved for a later date.

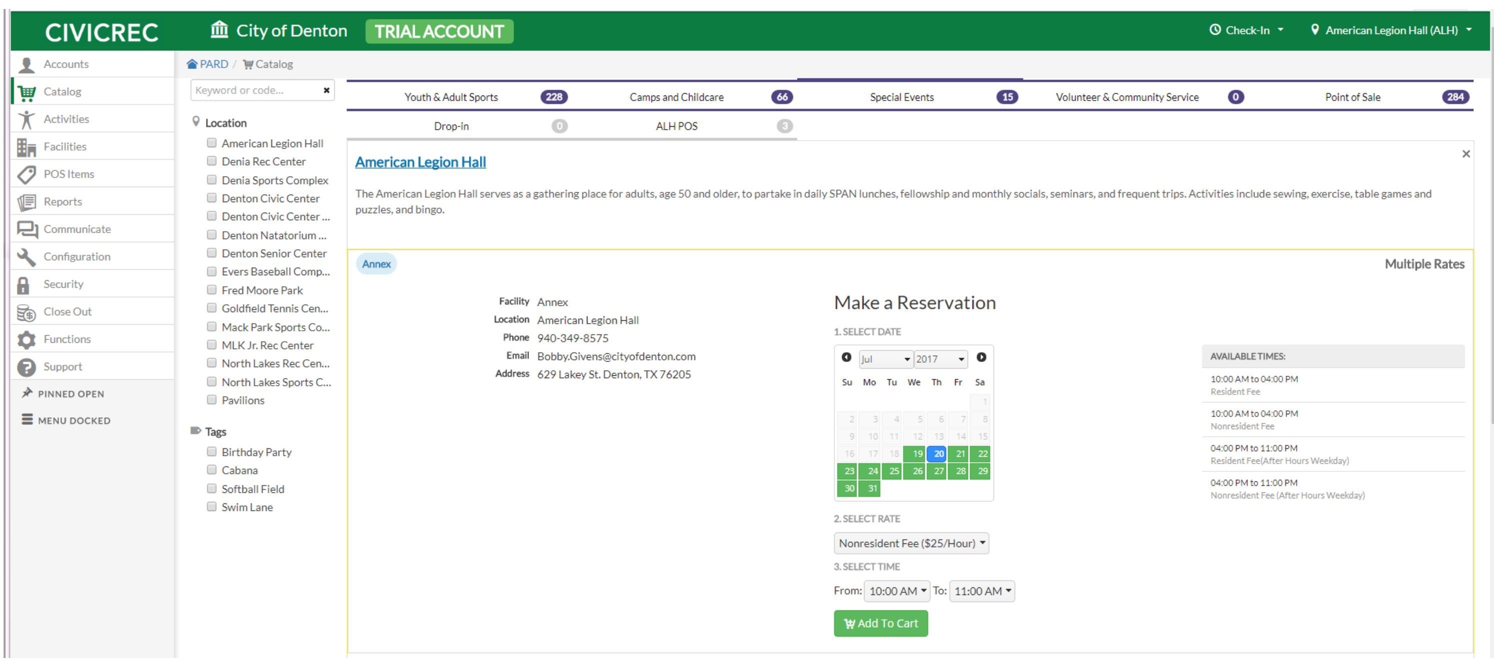


Booking a Facility

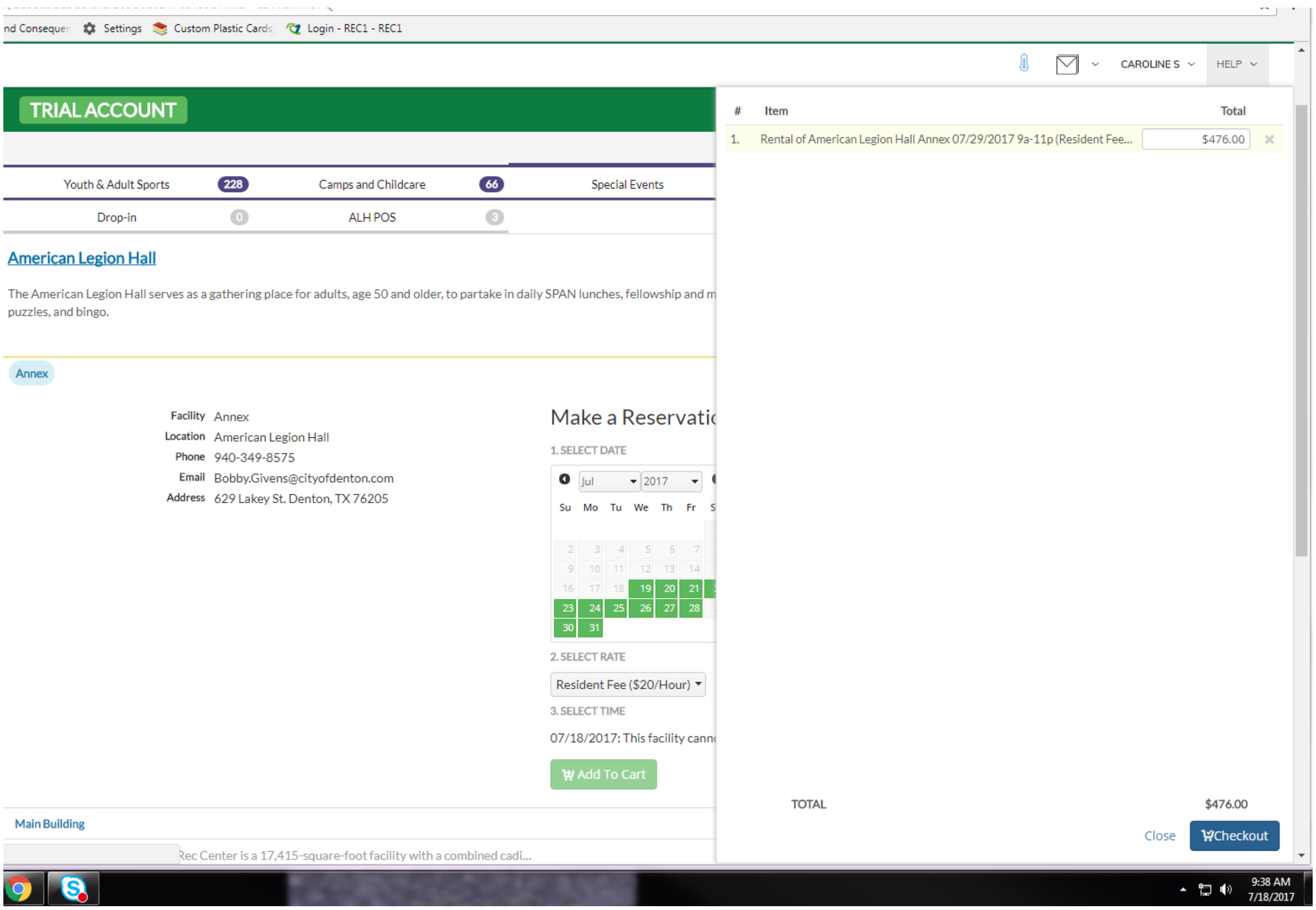
1. Open the Book, Rent, Reserve Catalog tab:



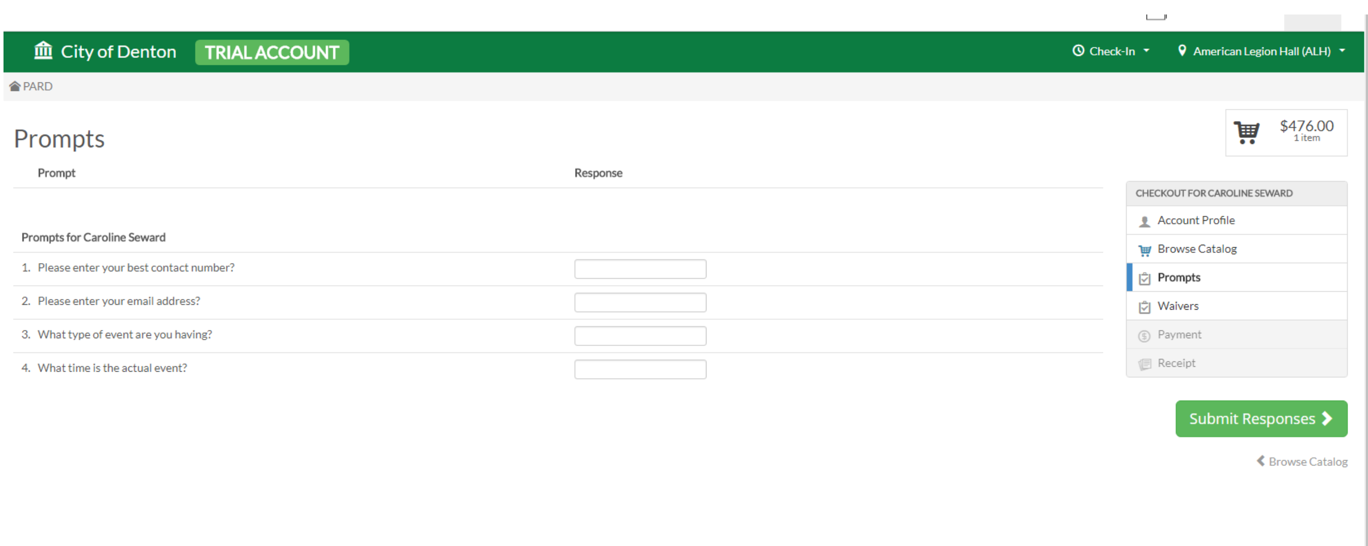
2. Selected the correct facility, date and time



3. Add to cart and select account if needed, then check out



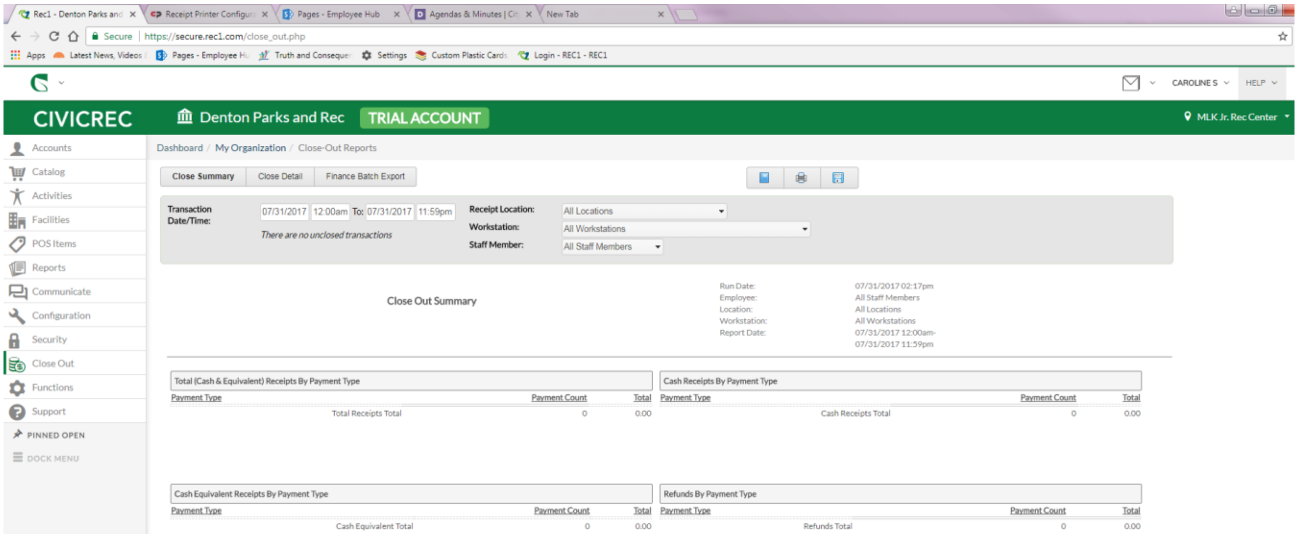
4. Answer any additional prompts then submit responses



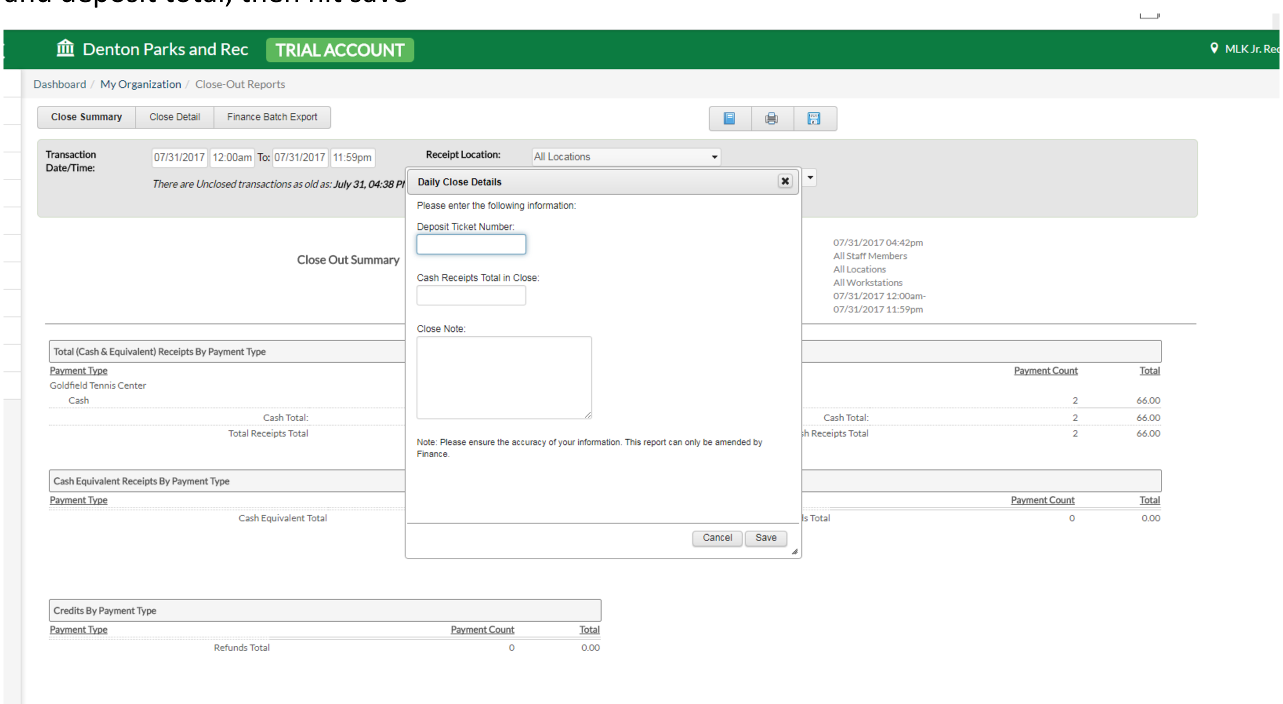
5. Confirm waiver agreement, this is set to be emailed to the person for a digital signature or you can print it
6. Take payment

Shift Change/Closing Out

1. At the end of a shift or at the end of the day open the Close Out Link and select Close Summary



2. Filter down to your location and work station
3. If you are just switching cashier, print the close summary and verify your drawer
4. If you are closing for the night, print the summary and verify your deposit, initial summary and added any need notes attach to rest of your paperwork
5. Once you verify everything is correct, save the close summary and enter the deposit slip number, and deposit total, then hit save



6. If you are required to do so print, the GL summary from the reports tab

Printing Attendance Sheets