Camp & Class Manager

Registration Adjustments
User Guide

April 2019

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Summary

Managing a camp can be challenging. Most of the time you're going to need to be quick on your feet and ready with answers to your participant's questions. And yet, sometimes the most basic things are the most necessary. You'll need to know how to transfer and cancel, edit prices and discount which are called **Registrations Adjustments** in the system. These are often also called **Order Actions**.

This user guide contains the basics about the **Registrations Adjustments** available to you in Camp and Class Manager. The **Registrations Adjustments** menu is where you can manage different aspects associated with an order, like editing purchases, transferring participants to other sessions, adding and removing discounts, and canceling registrations.

You'll find information addressing the most common questions about **Registrations Adjustments** as well as some best practices and troubleshooting tips. You can find more user guides and help articles about online accounts and many, many other topics in our Camps & Class Manager Help Center: http://support.activenetwork.com/camps

Current state of this order

	Item
Actions ▼ Actions View **Edit purchases** Transfer Add other discount Cancel	**Computer Science - Price** 🕐 06/01/2019 - 06/30/2019 📍 TEST Active Office 👤 Billy Baston **Tuition** Price - $400.00

Registration Adjustments

We will be going over the four main Registrations Adjustments available in the actions menu dropdown in this guide. Each action will enable you to perform important changes to an existing order.

Edit Purchases

You can always change the tuition price of an existing order if you need to adjust the price of a camp but want to do so without applying a discount. Sometimes tuition changes also come as a result of the price of a camp changing after someone has already registered.

It is important to note, however, that you cannot edit the price to be more expensive than the tuition allows.

To edit the price of an existing purchase:
1. Click **People** tab
2. Search customer's name in search bar
3. Select customer's name
4. Select Order number
5. Next to Item name, select **Edit** purchases from Actions drop-down menu
6. Next to tuition price, click **Edit**
    - Options to adjust the price include:
        - Manually adjust price: Being able to enter any price the user wants
        - Use standard price: Set the price to the regular price
        - Use early bird price: Set the price to an early bird cost
7. Select **Manually adjust price**
8. Reduce price by amount
9. Click **Continue to review screen**
10. Review changes
11. Click **Submit**

Adding Session Options to an Existing Order

In some cases, parents might have forgotten to add a session option to their order or didn't purchase enough of a specific item. In these instances, an agency admin does have the option to edit the order and adjust the session options.

To add or edit a session options purchase from an existing registration:

1. Click **People** Tab
2. Click camper name
3. Click Order number for appropriate program
4. Click Actions and choose **Edit Purchases**
5. Scroll to Session purchases and edit session options
   - Adjust quantity for quantity defined options
   - Check or Uncheck Session Options to add or remove them from order
   - Edit price of session options in individual orders
6. Click **Continue to Review Screen**
7. Click **Submit**

Modify registration for Billy Baston

| Session | Form questions |

Computer Science (06/01/2019 - 06/30/2019)
TEST Active Office

Select a tuition		Price		Spots left
◉ Price		Early bird price:	$400.00 Edit ▼	19

Select session options	Qty.	Price		Spots left
☐ Daily Lunch	1	$50.00		Unlimited
☑ Extended Care/Late Pick Up	5	$10.00 Edit ▼		Unlimited
☐ Extended Care/Early Drop Off	1	$10.00		Unlimited

Making Payments to Existing Orders

You might run into instances where you need to enter a payment for a parent. You can log a cash, paper check, or a credit card payment directly onto an order! You will not be able to apply an electronic check (e-check) payment within the customers account.

To log a payment:
1. Click **People** tab
2. Search and select account or participant name
3. Click **Make payment**
   - If account has more than one order, select correct order from drop down menu
4. Select Pay in Full or Custom Amount
5. Select payment method (credit card, paper check, or cash)
6. Enter required information
7. Click on **Submit payment**

Payment amount

Total amount due	$408.00
* Payment amount	◯ Pay in full ($408.00)
	◉ Custom amount $ 208.00

Recommended payment amount $408.00 **?**
Payment will be automatically allocated. Manage allocation

Payment information

Credit card   Check   Cash

Transfer Sessions

One of the more common actions is to transfer a participant from one session to another. If your participant changes their mind about an offering and wants another one, a transfer is what you need! In the product, you can transfer from one session to another in the same season only; you cannot transfer participants from one season to another, though!

Registrants can be transferred to a different session within the same season by:
1. Enter specific registrant's name into search bar at top
2. Click desired registrant name
3. Click appropriate Order number
4. Click **Actions** and choose **Transfer**
5. Select new session for registrant
6. Click **Continue to review screen**
7. Click **Submit**

Transfer/Register from the Waitlist

In some cases, a parent might end up registering their child for a program that is on a Waitlist. While some parents might transfer to another session or cancel their registration, it will open some spots up for others to be registered into the program!

To register participants from a waitlist:
1. Select season name
2. Select **Sessions** tab
3. Select desired session
4. Click number of **Waitlist registrations**
5. Click **Participant's name**
6. Click **Yes** on the pop-up Confirmation window
7. Next to session name, select **Register from waitlist** in **Actions** drop-down menu
8. Select tuition and session options
9. Click **Continue to Review screen**
10. Click **Submit**

Coupons and Discounts

There will be times when you either need to work with discounts on orders. Sometimes situations come up where a coupon is needing to be added or removed, or maybe a different discount needs to be applied. Here is how you can do this.

## To add a coupon to an existing order:

1. In **People** tab, search for desired participant's name
2. From list, click desired name
3. Under **Order history**, click **Order number** in blue
4. In top right corner, click **Apply dis**count
5. Choose **Apply a coupon**
6. Enter coupon code
7. Click Apply coupon
8. On review screen, click **Submit**
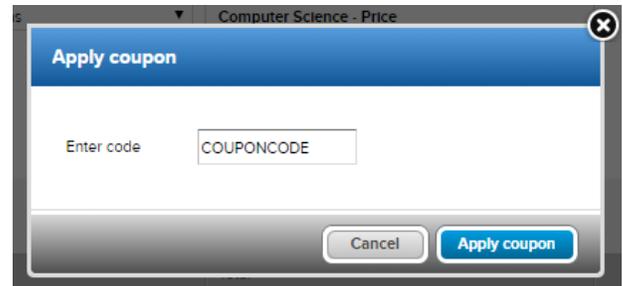
To remove a coupon from an existing order:

1. In **People** tab, search for desired participant's name
2. From list, click desired name
3. Under **Order history**, click **Order number** in blue
4. Select **Remove Coupon** from **Actions** drop-down
5. On review screen, click **Submit**

To add a discount to an existing order:

1. In **People** tab, search for desired participant's name
2. From list, click desired name
3. Under **Order history**, click **Order number** in blue
4. Select **Add other discount** from **Actions** drop-down
5. Select appropriate discount from dropdown
6. Fill in Amount if not auto-populated
7. Click **Apply discount**
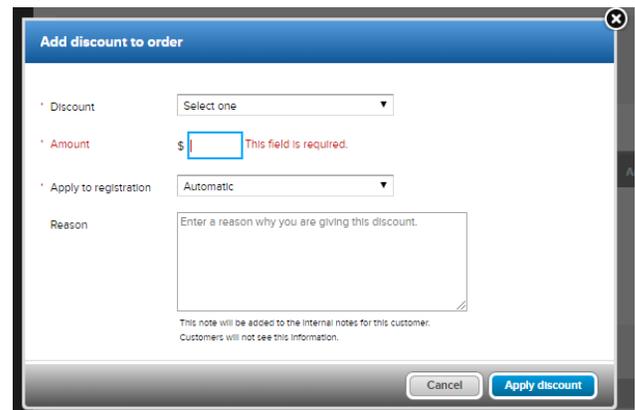
Cancel Registrations

If a participant asks to be withdrawn from a session or you are no longer offering a session, you can cancel a participant's registration. During a cancellation, you will be able to keep a cancellation fee. Additionally, you will have the option to place any funds paying into a credit balance or refund back to the parent via original payment method.

1. Select **People** tab
2. Search and select account or participant name
3. Select order number containing registration
4. Select **Cancel** from **Actions** drop-down menu
   - On this screen, you can enter an amount of a cancellation fee
   - *Note: cancellation fees can only be charged if something has been paid to the order.*
5. **Continue**
6. Review **Order summary** and **Credit to be refunded**
   - *Note: You can refund to the families credit balance on this page*
7. **Submit**

Order summary

Items	Subtotal
Canceled registration:	
Computer Science - Price	
🕐 06/01/2019 - 06/30/2019	
📍 TEST Active Office	
👤 Billy Baston	
Tuition	
[Canceled] Computer Science - Price - ($400.00)	($400.00)
	Original order balance View order $200.00
	Pending changes ($400.00)
	Updated order balance **($200.00)**

☐ Reallocate credit to be held in the family's credit balance. ❓

Credit to be refunded

These changes result in a credit on this order. This credit will be refunded to:

Your organization must refund $200.00

ACTIVE Network, LLC

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