

Camp & Class Manager 9.15 Release Notes

Release Date

Release Overview

Tuesday, November 26th, 2019

Global Session Options

Enhancements

Contents

Global Session Options	3
Setting up a global session option	3
Assigning global session options to sessions	7
Managing global session options	13
Purchasing global session options	17
Global session option information in reports and dashboards	21
Enhancements	25
FAQ link update	25

Global Session Options

To allow authorized users (including ACTIVE users, agency administrators and account owners) to set up and manage global session options that can be easily reused and assigned to different seasons and sessions, a new agency-level **Session options** feature has been implemented.

Location: Admin Site > Add-ons tab > Session options tab

Home People	Finance	Email	Membership	Add-ons		٩
Add-ons						
Home > Add-ons > Session opti	ons					
Merchandise Sessi	on options					
Session options			Sea	rch session op	tion Q	Actions
Add Delete			View by	Active session (options 🔻	Session option purchase report
Session option	Price	Capacity	Remaining	Status	Display	
Child care during class	\$0.00	10	10	Active	Online	
Lunch	\$8.00	Unlimited	Unlimited	Active	Online	
Pickup service	\$10.00	25	25	Active	Online	

Note:

- This feature is not available on CCM Lite.
- The previous Merchandise tab has been moved to under the Add-ons tab.

Home	People	Finance	E	nail	Membership	Add-ons				٩
Add-ons										
Home > Add-ons >	> Merchandise									
Merchandise	Session optio	ns							-	
Merchandise					Search n	ame or SKU		Q	Actions	
Add	Delete				Vie	w by All item	15	•	Fulfillment report	
Name		Variant	SKU	Price	Quantity	Status	Display			
0 A	University Men T-shir	Single	434124	\$20.00	Unlimited	d Active	Online	*		

Setting up a global session option

Creating a new global session option

To create a new global session option, click **Add-ons** tab > **Session options** > **Add** (or **Create your first option** if no session options exist).

Ноте	People	Finance	Email	Membership	Add-ons			٩
Add-ons								
Home > Add-ons >	 Session options 							
Merchandise	Session op	otions					_	
Session optio	ns			Si	earch session optic	on Q	Actions	
Add	Delete			View by	Active session op	tions 🔻	Session option p	urchase report
Session op	ption	Price	Capacity	Remaining	Status	Display		
Child care	during class	\$0.00	10	10	Active	Online		
		, N		7		· · · ·		
Home	People	Finance	Email	Membership	Add-ons			٩
Add-ons								
Home > Add-ons >	Session options							
Merchandise	Session opt	tions						
Session option	ns							
	With	the Session	options fe	eature, you	can:			
	+ Crea	te and manage sessi	on options that ca	an be reused durin	g session setup.			
	+ Assig	gn frequently-used se	ssion options to a	a session.				
	Crea	te your first session op	ntion	erren opnen.				

Then on the **Session option setup** page, enter or select the required information for the global session option:

Session opti	on setup	
Home > Add-ons > Session	options > New session option	
Session option detail	s	
Basic Information		
Session option name	Example: Lunch, Bus, Pickup, Day care	
	60 characters left	
Price	\$	
	Allow user-defined amount	
	Allow this session option to be discounted by coupons	
Capacity	Unlimited	
	Allow this session option to be purchased in quantities	
Description		
	<i>h</i>	
	250 characters left	
Smart session option		
Session option type	Select one	
Display type	Normal	
Display condition	Always display	
Question condition	No condition	
Availability		
A	.	
Availability	Always available	
	From 10/18/2019 2:21 pm	
	Until MM/DD/YYYY	
Status	Active 🔻	
Visibility	Online	
Session assignment		
economic designment		
Select seasons	Select seasons *	
Select sessions	All sessions	
	Selected sessions	
Accounting		
Accounting		
GI code	Unassigned *	
Cancel		Save

• **Basic information**: Such as name, price and capacity of this global session option.

- Smart session option: Set up the display and custom conditions for a session option type, which determines when selling a session, for example, whether a global session option is pre-checked or whether it only allows one purchase per family or per registrant.
- Availability: Status of this global session option (active or inactive), and when (date range) and where (online or internal) it is available for purchase.
- **Session assignment**: Assign this global session option to the required seasons and sessions.
- Accounting: Assign an existing GL code (if any) to this global session option.

Coupons and global session options:

When setting up coupons, agency users can now configure whether a coupon can be used when purchasing session options and which session options the coupon applies to.

Location: Admin Site > Home tab > a season > Coupons tab > New coupon or an existing coupon:

Home Peop	le Finance	Email	Membership	Add-ons
Coupons				
Coupon name	5-dollar-off			
	Name showing up on customer	recelpt		
Description	Not shown to customers			
Amount	5 dollars o	ff ▼		
Applied to	Most expensive eligible li	ine item in <mark>t</mark> he ord	ier 🔻	
Eligible sessions	 All sessions Selected sessions 			
Apply to tuitions or session options	Apply to tuitions and ses	sion options V		
	Apply to tailons and sess Apply to tuitions only Apply to session options	only		
Code	5\$OFF			

Coupons	
* Coupon name	5-dollar-off Name showing up on customer receipt
Description	Not shown to customers
* Amount	5 dollars off 🔻
Applied to	Most expensive eligible line item in the order 🔻
Eligible sessions	All sessions Selected sessions
Apply to tuitions or session options	Apply to tuitions and session options
	All session options Selected session options

The following rules apply to coupons during session registration:

- If a coupon is set as *Apply to tuitions and session options*, then during session registration:
 - If the coupon amount is greater than the sum of selected tuition and session options, then during checkout, the total amount of the tuition and selected session options is deducted, while the processing fee remains intact.
 - If the coupon amount is less than the tuition price, then during checkout, the coupon amount is entirely deducted.
- If the coupon is set as *Apply to session options only*, then during session registration, the coupon is only applied to the purchased session options.

Deposits and session options

When configuring deposits at the season level, options in the **Deposit amount** field (except for percentage-type deposits) now also apply to session options.

Location: Admin Site > Home tab > a season > Setup > Deposits and payment plans

Step 4: Dep	oosits and payment plans	Status: Active
Break up the price of car	mp by setting up deposits or payment plans.	See a preview
Initial deposit amo	unt ?	Settings
Specify the minimum a	mount a customer needs to pay to secure their spot when registering online.	Season
Deposit amount	Customers must pay in full in order to check out.	Sessions
	Customers must pay a deposit of \$ of tuitions in order to check out.	Session groups
	Note that merchandise items always require full payment at the time of purchase	Deposits and payment plans
	Customers must pay a deposit of 50 % of session tuitions in order to check out.	Discounts
	Note percentage does not include session options but that merchandise items always require full payment at the time of purchase	Look and feel
	 Customers can check out without making any payment. 	Registration forms
	Note that merchandise items always require full payment at the time of purchase	Confirmation email
Deposit option available until	06/01/2020	Activation
Hide full price	On session selection page show deposit amount in place of full price.	Frequently asked questions

The following rules apply to deposits during session registration:

- If the required flat deposit is greater than or equal to the tuition price, then during checkout, the selected tuition and session options must be paid in full.
- If the required flat deposit is less than the tuition price, then during checkout, users can select a payment plan.
- For a percentage-type (%) deposit, the deposit does include the cost of any purchased session options.

Assigning global session options to sessions

Agency-level assignment:

On the agency level, authorized users can now assign an active global session option to all or selected seasons/sessions.

Location: Admin Site > Add-ons tab > Session options tab > a global session option > Session assignment section

Session optio	n setup				
Home > Add-ons > Session op	otions > Edit session	option			
O Number sold		25 Remaining	\$0.00 Dollar amount sold		
Session option details			Delete this ses	sion option	
Basic information					
* Session option name	Pickup service 46 characters left				
* Price	\$ 10				
	Allow user-de	fined amount	a strange		 para di se
visibility			•		
Session assignment					
Select seasons	Summer 2020	Basketball and 1 other	•		
Select sessions	 All sessions 				
	Selected se	ssions			

Note:

- Each global session option can be assigned to a maximum of 5000 sessions.
- Users restricted to certain seasons/sessions can only assign a global session option to seasons/sessions visible to them.

After the assignment, this global session option will be listed on the assigned session setup pages.

Location: Admin Site > Home tab > a season > Setup > Sessions > a session > Session options

section

Step 2: Sess	sions									s	tatus: Active		
Set up your sessior Provide the details for you	n ur session, including l	ocation and tuition	options.						s	ettings	See a preview		
Basic settings													
Define the basics of you	ur session, including (dates, location and	or what pa	rticipants may	/ register.				•	Season			
									•	Sessions			
Session name	Basketball Wee	ik 1							•	Session gro	ups		
Datas			_							Deposits an	d payment pla		
Dates	06/01/2020	to 06/06/202)							Discounts			
	 Overnight 	ہ ہے۔	panella.	- Aller		 ,	<i>_</i>			ook and fr	i and	<i></i>	P
<u> </u>													
Session options													ſ
Optional products and s	services available for	purchase with this	ession.										
Session option		Price											
Pickup service		\$ 10.00				🖉 Edit det	ails 🗙	Delete					
Add a session optic	on												

Session-level assignment:

When setting up a session, authorized users can now assign an active global session option to the session.

Location: Admin Site > Home tab > a season > Setup > Sessions > a session > Session options section > Add a session option > Select global session options

Step 2: Ses	sions	Status: Active
Set up your session Provide the details for y	DD our session, including location and tuition options.	See a preview Settings
Basic settings		Season
Define the basics of y	our session, including dates, location and for what participar	s may register. Sessions
Session name	Basketball Week 1	Session groups
Dates	06/01/2020 to 06/06/2020	Deposits and payment plans
odies	06/01/2020	Discounts
Overnight?	 Overnight Day 	Look and feel
	 Both 	Registration forms
Location	\$108.00 Add price dev	Activation Edit details
Add a tuition		
Session options		
Optional products and	d services available for purchase with this session.	
Session option	Price	
Lunch	\$ 8.00	🖋 Edit details 💥 Delete
Pickup service	\$ 10.00	🖉 Edit details 🗙 Delete
🔶 Add a session op	tion 🗢 Reorder session options	

	Price	Early bird pricing					
Price	Add session	Add session option					
Add a tuition	I would like to:						
Session options	Create a se	ession option from scratch (use	d by this session only)				
Optional products and service	s available Select glob	al session options					
Lunch			Cancel	ок			
Pickup service	\$ 10.00		🧨 Edit details 🗙 D)elete			

Base tuition	1										
If multiple tuitions are available	Select session option										
Bulk selection Allow c		Only show selected session option.		Search							
Tuttion name		Session option	Price	Capacity	Remaining	GL code					
Price		Bedding Rental (international campe	\$10.00	Unlimited							
🔶 Add a tuition		Child care during class	\$0.00	10	10						
		Lunch	\$8.00	Unlimited							
Session options	1										
Optional products and service											
Session option											
Lunch											
Pickup service											
Add a session option	2 ses	sion option(s) selected				4 session option(s					
					Cance	Select					
Associated merchandise			_	_	Calice						

To remove a global session option from the session (regardless of whether it has been sold or not), click **Delete**:

Session options	Session options							
Optional products and services available for purchase with this session.								
Session option	Price							
Child care during class	\$ 0.00	🖋 Edit details 💢 Delete						
Lunch	\$ 8.00	🖋 Edit details 🛛 💢 Delete						
Pickup service	\$ 10.00	🖋 Edit details 🛛 🗶 Delete						
🔶 Add a session option 🛛 🚖 Reorder sess	sion options							

Users can still create a new session option that is exclusive to this session only (existing behavior):

Bulk selection . Allow customers to										
Tultion name	Price	Early bird pricing			×					
Price	Add session opt	ion			Ĭ					
Add a tuition	I would like to:	I would like to:								
Session options	Create a session	on option from scratch (used by this	session only)							
Optional products and services available	Select global set	ession options								
Session option										
Lunch			Cancel	ОК						
Pickup service	\$ 10.00		🖉 Edit details	X Delete						
♣ Add a session option ♣ Reorder	session options									

🗙 Delete
🗙 Delete
🗙 Delete

To change the display order of all session options for this session, click **Reorder session options**:

Session options							
Optional products and services available for purchase with this session.							
Session option	Price						
Lunch	\$ 8.00	🖉 Edit details 🛛 💥 De	elete				
Pickup service	\$ 10.00	🧨 Edit details 🛛 🗶 De	elete				
laundry service	\$ 5.00	🥒 Edit details 🛛 💥 De	elete				
extra-lunch box	\$ 10.00	🥒 Edit details 🛛 🗙 De	elete				
Add a session option	sion options						

aluun name	Reord	ler se	ssion options	
Price	Move t	he se	ssion options up and down to control how they will display to participants during registration.	
Add a tuition			Session option	
Session options	\bigcirc		Lunch	
Optional products and service			Pickup service	
	$\mathbf{\cdot}$		laundry service	
ession option			extra-lunch box	
unch				
Telum control			Cancel	

Note:

- A session can be assigned a maximum of 100 global session options.
- Global session options that are sold out or outside their availability date can still be assigned to a session, but will only be available in the ADMIN SITE Front Desk Registration (FDR) workflow.
- During session setup, users can edit an assigned global session option's **Session max** number, which must be less than or equal to the maximum capacity configured for the global session option.

Session options	Session options							
Optional products and services available ic	r purchase with this	session.						
Session option	Price							
Lunch	\$ 8.00	🖋 Edit details 🛛 🗙 Delete						
Pickup service	\$ 10.00	🖉 Edit details 💥 Delete						
+ Add a session option 🔶 Reorder se	sion options							

Price	\$ 108.00	d orice tier	₿ Fr		\otimes	
Add a tuition	Edit session option				T	
Session options	Session option name	Pickup service				
Optional products and services avai	Price	\$10.00				
Session option	Allow user-defined amount?	No				
Lunch	Description					
Pickup service	Display type	Normal				
Add a session option 🔶 Reor	Display condition	Always display				
Associated merchandise	Question condition	No condition	_			
You can select merchandise items to	Session max	25				
Add	Display status	Online				
Name	Allow purchased in quantities?	No				
University Men T-shirts	Allow discounts by coupons?	No				
	GL code					
			<u> </u>			
	_	_	Cancel	Save		

When editing the **Session max** number, note that two types of inventory control ("first-come-first-serve" or "pre-distribute") can be applied to the assigned global session option. For example, a global session option with a total capacity of 100 has been assigned to 3 sessions, then:

- Authorized users can set all 3 sessions' Session max to 100. When consumers purchase the assigned
 global session option in the CUI or SSUI, the "first-come-first-serve" mechanism is applied and the total
 number of the global session option that can be purchased in the CUI and SSUI is 100.
- Authorized users can pre-distribute the assigned global session option's total 100 capacity across these 3 sessions. For example, Session max for session a is 40, for session b is 10 and for session c is 50. Then when consumers purchase the global session option in the CUI or SSUI, 40 can be purchased in session a, 10 in session b and 50 in session c.
- When copying a season or session, global session options assigned to the season/session are also copied to the new season/session.
 - Only active global session options are copied.
 - If a global session option is sold out, it is still copied to the new session, but will only be available in the ADMIN SITE FDR workflow.
 - If a global session option has already been assigned to 5000 sessions, then it cannot be copied to the new session.
 - If a global session option has been assigned to N (N>2500) sessions in the same season, then when batch-copying those N sessions, only (5000–N) sessions will be copied with this global session option, while the remaining sessions will be copied without this global session option (for example, when batchcopying 3000 sessions, only 2000 sessions will be copied with this global session option while the remaining 1000 sessions will not include this global session option).
- When exporting sessions, assigned global session options are also exported (note: only the first 10 session options are exported regardless of whether they are session-level or global session options). Then when importing those sessions during session setup, the exported global session options will be imported as session-level session options.

	А			DD	DE	DF	DG	DH	DI	DJ	DK	DL	DM
1	Session Name	🕶 Tuitis	bde	🔻 Option1 - 🔻	Option1 🔻	Option1 - Descriptic	Option1 - 🔽	Of 🗸	Option1 - 💌	Optic 🔽	Option1 🔽	Option2 - Name 💌	Option2 - Pri 💌
2	Beginner-Yoga	1		Lunch	8.00	lunch box provided to	service		Online	no		Pickup service	10.00
3	Advanced-Yoga			Lunch	8.00	lunch box provided to	service		Online	no		Pickup service	10.00
4	Yoga for Girls!			Lunch	8.00	lunch box provided to	service		Online	no		Pickup service	10.00
5	Session 4												
6	Session 5	-											
7	Session 6												
8	Session 8												
9	Z-Session 11			Lunch	8.00	lunch box provided to	service		Online	no		Pickup service	10.00
10	Session 7												
11	Session 9			Lunch	8.00	lunch box provided to	service		Online	no		Pickup service	10.00
12	Session 10			Lunch	8.00	lunch box provided to	service		Online	no		Pickup service	10.00

- When deactivating a session, its global session option assignments still remain. If this session is reactivated, then the previous assignments are still effective.
- When deleting an unsold session, its global session option assignments are removed.

Managing global session options

Under the Admin Site > Add-ons tab > Session options tab, authorized users can easily search for (by session option name), view, edit, activate, deactivate or delete existing global session options.

	Home	People	Finance	Email	Membership	Add-ons		٩.
Ad	ld-ons							
Home	> Add-ons > !	Session options						
N	Merchan <mark>di</mark> se	Session option	15					
Se	ssion option	s			Sea	arch session opt	ion Q	Actions
	Add	Delete			View by	Active session c	options 🔻	Session option purchase report
	Session opt	lon	Price	Capacity	Remaining	Status	Display	
	Bedding Re	ntal (international ca	mper \$10.00	Unlimited	Unlimited	Active	Online	
	Child care d	luring class	\$0.00	10	10	Active	Online	
	Lunch		\$8.00	Unlimited	Unlimited	Active	Online	
	Pickup servi	ice	\$10.00	25	25	Active	Online	

Editing:

Authorized users can perform quick edits on a global session option's name, price, total capacity, status and display rule by clicking anywhere on a required session option:

dd-ons								
ie > Add-ons > Sessio	n options							
Verchandise	Session options							
ession options				Se	arch session opt	tion	Q,	Actions
Add De	lete			View by	Active session of	options	•	Session option purchase report
	4	Price	Capacity	Remaining	Status	Display		
Session option							-	
Bedding Rental (in	iternational campers or	10	Unlimited	Unlimited	Active T	Online		

To review and edit full details of a global session option, click the required session option name link to open the **Session option setup** page:

Add-ons							
Home > Add-ons > Session options							
Merchandise Session o	ptions						
Session options			Se	arch session op	tion	Q,	Actions
Add Delete			View by	Active session (options	Y	Session option purchase report
Session option	A Price	Capacity	Remaining	Status	Display		
Bedding Rental (internation	al camper \$10.00	Unlimited	Unlimited	Active	Online		
Child care during class	\$0.00	10	10	Active	Online		
Lunch	\$8.00	Unlimited	Unlimited	Active	Online		
Pickup service	\$10.00	25	25	Active	Online		
Home > Add-ons > Session options	> Edit session option	25		\$0.0	00		
Number sold	Re	maining		Dollar amo	unt sold	ption	
Basic information							
Session option name 46	Pickup service characters left						
' Price \$	10						
	Allow user-defined amount Allow this session option to	: be discounted by	/ coupons				
Capacity	25			0			
	Allow this session option to	be purchased in	quantities				

Deactivating/activating:

To deactivate a global session option, on either the **Session options** list or the detailed **Session option setup** page, select **Status** > *Inactive*.

Add-ons							
Home > Add-ons > Session op	itions						
Merchandise Ses	ion options						
Session options				Se	arch session op	tion Q	Actions
Add Delete				View by	Active session of	options 🔻	Session option purchase report
Session option	•	Price	Capacity	Remaining	Status	Display	
Bedding Rental (inter	national camper	\$10.00	Unlimited	Unlimited	Active	Online	
Child care during class		0	10	9	Active V	Online 🔻	
Family lunch pack		Cancel	Save	Unlimited	Active Active	Online	
		\$8.00	Unlimited	Unlimited	Active	Online	
		\$0.00		o minico d	, icare	Chilline -	
Home > Add-ons > Session op 1 Number sold	tions > Edit session	option Rem	9 aining		\$0.0 Dollar amou	DO unt sold	
Session option details					Delete	this session option	
Basic information							
* Session option name	Child care durin 37 characters left	ng class					
* Price	\$ 0						
and we	Allow user-de	fined amount	a states			and seal	Same and the second
	No. rondition						
Availability	- Ho-contaiton						
Availability	Always availa	ble					
	From MM/I	DD/YYYY	HH:MI	M			
	Until MM/E	DD/YYYY	HH:M	N			
Status	Active				•		

Once a global session option has been deactivated:

• It is moved to the **Add-ons** > **Session options** tab > **View by** dropdown > *Inactive session options* list:

Home > Add-ons > Session options						
Merchandise Session options						
Session options			Searc	ch session option	Q,	Actions
Add Delete			View by In	active session op	tions 🔻	Session option purchase report
Session option	Price	Capacity	Remaining	Status	Display	
Child care during class	\$0.00	10	9	Reactivate	Online	

- It is removed from sessions that it was assigned to.
- It can no longer be edited except for its **Status**, which allows authorized users to re-activate this session option.

tone > Add one > Setson options Setsion options Set in setsion option Actions Setsion option are during clean Date of the setsion option Interview Chick care during clean Date of the setsion option Interview Setsion option setup Parameters Setsion option Interview Setsion option setup Parameters Date of the setsion control Interview Mumber tool Parameters Date of the setsion control Interview Setsion option setup Parameters Date of the setsion control Interview Number tool Parameters Date of the setsion control Interview Setsion option decails Date of the setsion control Interview Interview Parameters list Paramet	Add-ons										
Merchandlike Session options Session options Search session option Actions Exession options Exestion options Exestion options Exestion options Child Caree during class 5000 0 9 Exestion options Child Caree during class 5000 0 9 Exestion options Child Caree during class 5000 0 9 Exestion option Session option setup Participa Partita Participa Partita Participa Participa Partita Participa Partit	ome > Add-ons > Session	options									
Session options Search session option Actions	Merchandise Se	ession options									
Session options Search easion option Q Actions • Add Delate Verw by Inactive session options Image: Session option • Child care during class 50:00 10 9 Delate transmitting Delate transmitti									anavin		
Add Delete Verwith by Inactive session options © Session option Price Capacity Remaining Brack Delete Delete <td< th=""><th>Session options</th><th></th><th></th><th></th><th>S</th><th>Search session opti</th><th>on</th><th>0,</th><th>Actions</th><th></th><th></th></td<>	Session options				S	Search session opti	on	0,	Actions		
Seastion option Price Cause during class 30.00 10 9 Reactivitie Reactivitie Seastion option setup 1 9 \$0.00 00 9 80.00 Doiler emount sold Session option details Description Price 1 1 9 9 20 class of price relation option Session option details Description fametion Session option fametion 20 class of price relation option Allow this session option to be discounted by coupons Abov this session option to be discounted by coupons Allow this session option to be discounted by coupons Autor this session option to be discounted by coupons Allow this session option to be discounted by coupons 20 class of price relation Autor this session option to be discounted by coupons 20 class of price relation Autor this session option to be discounted by coupons 20 class of price relation Autor this session option to be discounted by coupons 20 class of price relation Autor this session option to be discounted by coupons 20 class of price relation Autor this session option to be discounted by coupons 20 class of price relation Autor this session option to be discounted by coupons 20 class of price relation Autor this session option to be discounted by coupons 20 class of price relation Autor this session option to price relation Auto	Add Dele	te			View by	Inactive session	options	•	Session op	ntion purchase	report
Child care during class 50.00 10 9 Detection	Session option	•	Price	Capacity	Remaining	g Status	Display				
Session option setup Imme > Addons > Session options > Edit session option Imme > Addons > Session options > Edit session option Imme > Addons > Session options > Edit session option Remaining Social Session option details Delate this session option Basic information Session option name Orisid care during class Imme = Imme	Child care during c	lass	\$0.00	10	9	Reactivate	Online				
Seession option setup tome > Add-ons > Session options > Edit session option 1 9 Number sold Session option details Delete this session option Basic Information Session option neme Crist care during class 37 Characters lift Pice 3 @ Allow this session option to be discounted by coupons Crist@ Allow this session option to be discounted by coupons Crist@ Availability											
Session option i Sectop Image: Number sold Image: Number sold Session option details Basic information Session option name Ording care during class 37 characters left Pice 3 characters left Pice * Allow user-defined amount Allow this session option to be discounted by coupons Availability Availability Availability Status Imative Yubity	Session onti	on setun									
Image: Section options > Edit session options > Edit session option Image: Section option details Session option details Belicit information	vession opti	onsetup									
Image: Difference of the second regions of the second regions Image: Difference of the second regions of the second regions Second regions of the second regions of the second regions Second regions of the second reg	ama b. Add ana b. Cassian	entions > Edit cossion	ention								
1 9 Number sold 9 Remaining Set 0.00. Dollar amount sold Setsion option details Delete this setsion option Besic information Setsion option name Child care during class 3' characteris let Pice Allow user-defined amount Allow this setsion option to be discounted by coupons Aution No conductor Aution No conductor Aution No conductor Aution No conductor No conductor No conductor Setsion No conductor No conductor No conductor Setsion No conductor No conductor <td>ome > Add-ons > Session</td> <td>options > Edit session</td> <td>option</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td>	ome > Add-ons > Session	options > Edit session	option								
Number sold Remaining Session option details Basic information Session option name Child care during class 37 characters left Price \$ • <td< td=""><td>1</td><td></td><td>9</td><td>9</td><td></td><td>\$0.0</td><td>00</td><td></td><td></td><td></td><td></td></td<>	1		9	9		\$0.0	00				
Session option details Detete this session option Basic information Session option name Child care during class J7 characters lot Pirce Allow user-defined amount Allow this session option to be discounted by coupons Availability Availability MidDDYYYY HEMM MidDUYYY HEMM MidDUYYY HEMM			_	aining		Dollar amou	nt sold				
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Basic Information Session option name Child care during class 37 characters left Price Allow user-defined amount Allow this session option to be discounted by coupons Availability Availability Availability Status Inactive Inactiv	Number sold		Rema	annig							
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37 characters left Price \$ 0 Allow user-defined emount Allow this session option to be discounted by coupons Capacity 0 No condition Availability Availability Availability 0 From MM/DD/YYYY HEMM Unit MM/DD/YYYY HEMM	Number sold Session option detai Basic information	ls	Rem		1	Delete	this session	option			
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Allow this session option to be discounted by coupons Centry No condition Availability Availability	Number sold Session option detai Basic information Session option name	Is Child care durit 37 characters left	Rema	an in ing		Delete	this session	option			
Availability Availability Status Inactive Visibility Idouble Active Visibility	Number sold Session option detail Basic Information Session option name Price	Is Child care durit 37 characters left \$ 0	Rema			Deiete	this session	option			
Ceperty 10 Availability Availability Availability Brom MM/DD/YYYY HHLMM Unti MM/DD/YYYY HHLMM Status Inactive Visibility Inactive	Number sold Session option detail Basic information Session option name Price	Child care durit 37 characters left \$ 0 Allow user-de	Rema ng class			Delete	this session	option			
Availability Availability Availability	Number sold Session option detail Basic information Session option name Price	Is Child care duri 37 characters left \$ 0 Allow user-de Allow this see	Remaining class	e discounted b	y coupons	Delete	this session	option			
Availability Availability Availability Availability Availability Availability Availability Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inactive Inacti	Number sold Session option detail Basic information Session option name Price Capacity	Is Child care durn 37 characters left \$ 0 Allow user-de Allow this set	Remaing class	e discounted b	y coupons	Delete	this session	option			
Availability Availability Availability Availability From MM/DD/YYYY HHŁMM Unti MM/DD/YYYY HHŁMM Status Inactive Visibility Inactive	Number sold Session option detail Basic information Session option name Price Caronty	Is Child care durin 37 characters left \$ 0 Allow user-de Allow this set	Remaing class	e discounted b	y coupons	Delete	this session	option			
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From MM/DD/YYYY HHEMM Until MM/DD/YYYY HHEMM Status Inactive Active Visibility Inactive	Number sold Session option detail Basic Information Session option name Price Canosity Canosity Availability	Is Child care duri 37 characters left \$ 0 Allow user-de Allow this set 10 No condition	Remaining class	e discounted b	y coupons	Delete	this session	Option			
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Deleting:

To delete one or more global session options, select the required session options and then click **Delete**.

Ad	ld-ons						
Home	e > Add-ons > Session options						
N	Merchandise Session options						
Se	ssion options			Sea	rch session op	tion	Actions
	Add Delete			View by	Active session (options 🔻	Session option purchase report
	Session option	Price	Capacity	Remaining	Status	Display	
	Bedding Rental (international camper	\$10.00	Unlimited	Unlimited	Active	Online	
~	Family lunch pack	\$15.00	Unlimited	Unlimited	Active	Online	
	Lunch	\$8.00	Unlimited	Unlimited	Active	Online	
	Pickup service	\$10.00	25	24	Active	Online	

Note:

- Global session options that have already been sold cannot be deleted, they can only be deactivated.
- If a global session option has been assigned to seasons/sessions that are restricted from the user, then the user cannot delete the global session option.
- When batch deleting, if a global session option is assigned to seasons/sessions that are restricted from the user, then the batch-delete action cannot proceed.

Purchasing global session options

Assigned global session options (as long as they are active, visible online and available during the time of purchase), are displayed for purchase in the assigned and activated sessions in the Admin Site, CUI and SSUI (same as existing session- level session options).

Note:

- Assigned global session options that are only internally visible are only displayed in the Admin Site FDR workflow.
- Out-of-availability-date and sold-out global session options can still be purchased only in the ADMIN SITE FDR workflow.
- Smart session option configurations only apply to the CUI.

ADMIN SITE:

Location: Admin Site > Home tab > required season > Register someone link > individual name > Register > required session > Select session options section

Re	gister Kathy Wh	ite						Yoga 2019- Total	2020 \$0.00
Yoga	a 2019-2020							Kathy White	
Se	lect sessions Answer question	ons						Beginner-Yoga 11/01/2019 - 01/30/203	20
								Subtotal	\$0.00
Sess	ions						Q,	Total	\$0.00
	Session name	Date	Location	Gender	Age/Grade	Open spo	ts		
	Advanced-Yoga	12/01/2018 - 11/30/2019	White Heave	Co-ed	15 - 60	6			
	Beginner-Yoga	11/01/2019 - 01/30/2020	Community	Co-ed		Unlimited			
	Yoga for Girls!	12/15/2018 - 10/31/2019	Innovation To	Female	10 - 40	19			
	Session 9	07/01/2019 - 10/31/2019	Innovation To	Co-ed		Unlimited	-		
	Show completed sessions								
B	eginner-Yoga (11/01/2019 - 01/30/2)	020)				Y Remo			
Co	ommunity Building					~			
Se	elect a tuition			Price	:	Spots left			
0) Discount tuition (age <25 or >55)			\$450.00		2			
0	Adult tuition (age 25-55)			\$500.00		Unlimited			
_									
Se	elect session options		Qty.	Price		Spots left			
	Child care during class		1	\$0.00		10			
	Lunch		1	\$8.00		Unlimited			
	Pickup service		1	\$10.00		25			

When editing a registration (such as transferring to another session, editing a purchase or canceling a registration), available global session options are also displayed.

Location: Admin Site > Home tab > required season > Sessions tab > required session > required registrant > Actions dropdown

For example, when transferring to another session:

oga 2019-20	020				Season balance	
me > People > Kathy White	e > Yoga 2019-2020				\$447.50 Kathy White	
к	(athy White				\$447.50 Family	
	emale Age 37				View family finances	
	Make payment Send email	Run reg form report	Buy membership		Waivers	Edit
Add photo					Waiver form	
					Health Certificate	
ogistrations and atta	ndanco					
Registrations and atte legistration information an Add registration	ndance	in this season.			Parent information Kathy White Primary parent	Edit
egistrations and atte egistration information an Add registration	ndance Id attendance tracking for sessions i	in this season.		to oo	Parent information Kathy White Primary parent home: 404-434-1234	Edit
Registrations and atte legistration information an Add registration kctions - Beginner-Yoga Transfer session	ndance Ind attendance tracking for sessions i 30/2020	in this season.	4	50.00 Balance	Parent information Kathy White Primary parent home: 404-434-1234 1790303374@qq.com	Edit
Registrations and atte Registration information an Add registration Add registration Interpretation Transfer session Edit purchases	ndance Id attendance tracking for sessions i 30/2020 Building	in this season.	9	\$0.00 Belance	Parent information Kathy White Primary parent home: 404-434-1234 1790303374@qq.com 123 test dr. United States. NF 12345	Edn
Registrations and atte legistration information an Add registration kations - Beginner-Yoga Transfer session Edit purchases Cancel registration	ndance Id attendance tracking for sessions i 30/2020 Building 55) - \$500.00	in this season.	4	\$0.00 Balance	Parent information Kathy White Primary parent home: 404-434-1234 1790303374@qq.com 123 test dr. United States, NE 12345	Edit
Registrations and atteregistration information an Add registration Add registration kctions - Beginner-Yoga Transfer session Edit purchases Cancel registration View order	ndance Id attendance tracking for sessions i 30/2020 Building 55) - \$500.00 ss - \$0.00	in this season.	4	\$0.00 Belance	Parent information Kathy White Primary parent home: 404-434-1234 1790303374@qq.com 123 test dr. United States, NE 12345	Edit
Registrations and atte legistration information an Add registration Add registration Add registration Add registration Cancel registration View order Resend confirmation em	ndance Id attendance tracking for sessions i 30/2020 Building 55) - \$500.00 ss - \$0.00 Assign participant usign participant	in this season.	4	\$0.00 Belance	Parent information Kathy White Primary parent home: 404-434-1234 1790303374@qq.com 123 test dr. United States, NE 12345	Edit

F ra	nsfer to anothe	r session					
rans	fer Kathy White OUT of:						
Katł Begi Com Adult Ch	ny White inner-Yoga (11/01/2019 - 01/30/202 imunity Building t tuition (age 25-55) ild care during class	0)	\$500.00 \$0.00	\$50 Amount pr \$0.	08.00 aid 00 y balance)	
Total	l:		\$508.00				
Se	lect session Form question	Date	Location	Candar	Ano/Crade	Onen cnoto	Q
	Advanced Vaga	Date	White Heave	Gender	Age/Grade	open spots	
	Yona for Girisi	12/15/2018 - 10/31/2019	Innovation To	Fomalo	10 - 40	19	
-	Session 9	07/01/2019 - 10/31/2019	Innovation To	Co-ed	10 10	Unlimited	
I St	Session 10 how completed sessions	11/16/2019 - 12/31/2019	Innovation To	Co-ed		Unlimited	Ŧ
Ses	Session 10 now completed sessions slon 9 (07/01/2019 - 10/31/2019) ovation Tower	11/16/2019 - 12/31/2019	Innovation To	Co-ed Price		Vnlimited X Remo Spots left	ve
Sele	Price			\$0.00	Edit 🔻	Unlimited	
Sele Sele	Price Price Ct session options		Qty.	\$0.00 Price	Edit 🔻	Unlimited Spots left 9	1
Sele Sele Controls Sele	ect a tution Price ect session options Child care during class		Qty. 1	\$0.00 Price \$0.00 \$8.00	Edit 🔻	Unlimited Spots left 9 Unlimited	1

<u>CUI</u>:

In the CUI, customers can purchase global session options assigned to a session (CUI > **Registration Information** page > **PARTICIPANTS & OPTIONS** section > **Select session options**).

<u>Desktop</u>

<u>Mobile</u>

Registration Information				× ACTIVE Sattvic Retreats	••
OMPLETE THE FOLLOWING INFORMATION TO REGIST	ER			Adult tuition \$5	50.00
1 ENTER YOUR EMAIL ADDRESS			SECURE ONLINE REGISTRATION	Sub	total:
Kathy White			HAVE QUESTIONS?	Register \$55	0.00
1790303374@qq.com Sign Out			Advanced-Yoga contact	for Tracy White	
2 PARTICIPANTS & OPTIONS		Add sessions	Kate Willson	08/01/1991 Female G 18+	rade
Advanced Vega		<i>.</i> ×	 1234567890 two@one.com 	Select session option	าร
11/01/2019 - 01/30/2021 White Heaven Beach				Advanced-Yoga - Adult tuition Options	
Ages 15 - 60 Grades 10th - Adult (18+) as of 2019 - 2020 school year	Subtota	ı: \$550.00		Child care during 1 \$	0.00
Adult tuition		\$550.00		We provide free child-care service in this session so t you	hat
Register for Tracy White 08/01/1991 Female Grade 18+				View * More	
Select receipe options				Lunch 1 \$	8.00
		1.0		attendees	
Advanced-Yoga - Adult tuition Options	Qty.	\$0.00		Pickup service 1 \$1	0.00
We provide free child-care service in this session so that you	1	50.00			
View More 🕶					
Lunch	1	\$8.00			
lunch box provided to attendees					
		010.00			

Tuition bucket and session group registration workflows also support the purchase of global session options:

	<u>Deskto</u>	<u>p</u>		Mobile
1 ENTER YOUR EMAIL ADDRESS			SECURE ONLINE REGISTRATION	× ACTIVE Sattvic Retreats
Kathy White			HAVE QUESTIONS?	Register Subtotal
n sooson - @qq.com ogn out			Advanced-Yoga contact	for \$950.00
2 PARTICIPANTS & OPTIONS	5	Add sessions	Kate Willson	White 11/11/2000 Male Grade
			L 1234567890	18+
Family yoga together!		/ ×	two@one.com	Select session ontions
11/01/2019 - 01/30/2021	Subtota	1: \$950.00		Advanced-Yoga - Adult
Advanced-Yoga - Adult tuition		\$550.00		tuition Options
Advanced-Yoga - Discount tuition (age <25 or		\$400.00		Lunch 1 \$8.00
>55)				lunch box provided to attendees
View session details				Pickup 1 \$10.00 service
Register for Dave White 11/11/2000 Male Grade 18+				Advanced-Yoga - Discount tuition (age <25 or >55) Options
Select session options				Lunch 1 \$8.00
Advanced-Yoga - Adult tuition Options	Qty.	Price		lunch box provided to attendees
Lunch	1	\$8.00		Pickup 1 \$10.00
lunch box provided to attendees				service
Pickup service	1	\$10.00		
Advanced-Yoga - Discount tuition (age <25 or >55) Options	Qty.	Price		
Lunch	1	\$8.00		
lunch box provided to attendees				
Pickup service	1	\$10.00		

••••

<u>SSUI</u>:

On the SSUI, purchased session options are listed under the relevant registrant. If customers wish to make additional purchases, then they can click **ADD PURCHASE** to view and select additional session options assigned to this session.



Global session option information in reports and dashboards Session option purchase report Agency users can use this new report to view purchase information about global session options sold in all or specific seasons and sessions (regardless of whether they were sold in the Admin Site, CUI or SSUI).

Location: Admin Site > Add-ons tab> Session options > Session option purchase report link

H	lome	People	Finance	Email	Membership	Add-ons		٩.
Add	d-ons							
Home a	> Add-ons > S	ession options						
Me	erchandise	Session option	ns					
Sess	sion options	5			Sea	rch session op	tion Q	Actions
	Add	Delete			View by A	ctive session	options 🔻	Session option purchase report
	Session opti	on	A Price	Capacity	Remaining	Status	Display	
	Bedding Ren	ntal (international ca	mper \$10.00	Unlimited	Unlimited	Active	Online	
	Child care du	uring class	\$0.00	10	9	Active	Online	
	Family lunch	pack	\$15.00	Unlimited	Unlimited	Active	Online	

Se	ssion op	tion purchase	report					
Home	> Add-ons > Ses	ision options > Session option pure	:hase report					
Ses	sion option pu	urchase report		(Share Expo	Search sessio	n option (Q,
Sea	son	All seasons 🥒 Edit		Session	All sessions	/ Edit		
Sest	sion option	All session options 🤌 Edit		Date of purc	hase MM/DD/YYY	Y to MM/DD/YYY	Y Update	
E	Email selected peo	ople					Showing 4 of	4
	Participant	Session option	GL code	Season	Session	Number sold	Subtotal	
	White, Jimmy	Lunch		Summer 2020 Baske	Basketball Week 1	1	\$8.00	
	White, Jimmy	Pickup service		Summer 2020 Baske	Basketball Week 1	1	\$10.00	
	White, Kathy	Lunch		Yoga 2019-2020	Beginner-Yoga	1	\$8.00	
	White, Kathy	Child care during class		Yoga 2019-2020	Beginner-Yoga	1	\$0.00	

To send the purchase report to participants, select the required participants and then click the **Email selected people** button.

To export the purchase report into an excel file, click the **Export** button.

Note:

- This report is only available to authorized users who have access to the Add-ons tab.
- This report only includes purchase information for global session options.
- Users can search global session options by session option name or GL code.
- All columns are sortable.
- Users can filter global session options by assigned seasons or sessions.
- Users under the "Hide participant financial data" restriction cannot see the **Subtotal** column.
- Users with season/session restrictions can only select and filter seasons and sessions available to them.
- Deactivated global session options which were sold are also listed in this report.

Season setup auditing report

If assigned global session options have their settings changed or if they have been unassigned from a session, then agency users can view those changes in this report.

Location: Admin Site > Home tab > required season > Reports > Season setup auditing

report link Changes are reflected in the following columns in this report

- Type of change
- Name of changed item
- Previous value
- Final value
- Date of change (UTC)
- User

Type of change 🛛 🔽 Nam	e of changed ite 🔽	Previous value	Final value	Date of change (UTC 🔽 User	-
Options: Change availab Level	2 Oral English Tra	Online	Internal	06/26/2019 7:38:58 AM camps1 active	
Options: Change option Level	2 Oral English Tra	\$100.00	\$55.00	06/26/2019 7:32:14 AM camps1 active	
Options: Change sessior Level	2 Oral English Tra	SO type add on yes for I	SessOptype6	06/26/2019 7:32:14 AM camps1 active	
Options: Delete existing Level	2 Oral English Tra		Deleted	06/26/2019 7:31:53 AM camps1 active	

Other reports and dashboards

Information about purchased global session options is also available in the following dashboards, reports and emails (same as existing session-level session options):

- Season dashboard (Admin Site > Home tab > required season)
- Session dashboard (Admin Site > Home tab > required season > Sessions > required session)
- Custom report (Admin Site > Home tab > required season > Reports > New custom report)
- Registration form report (Admin Site > Home tab > required season > Reports > Registration form report)
- Financial dashboard remittance (Admin Site > Finance tab)
- Accounts receivable Admin Site > Finance tab > View accounts receivable link)
- ACTIVE account statement (Admin Site > Finance tab > View ACTIVE account statement link > Additional purchase activity tab)
- Session summary report (Admin Site > Finance tab > View ACTIVE account statement link > Run report dropdown >

Session summary report)

- Session type summary report (Admin Site > Finance tab > View ACTIVE account statement link > Run report dropdown > Session type summary report)
- Allocation report (Admin Site > Finance tab > View ACTIVE account statement link > Run report dropdown > Allocation report)
- Credit balance report (Admin Site > Finance tab > Reports > Credit balance report)
- Customer payments/refunds report (Admin Site > Finance tab > Reports > Customer payments/refunds)
- Deferred revenue report (Admin Site > **Finance** tab > **Reports** > **Deferred revenue report**)
- Financial activity report (Admin Site > Finance tab > Reports > Financial activity)
- Payment plan report (Admin Site > Finance tab > Reports > Payment plan report)
- Custom financial report (Admin Site > Finance tab > Reports > custom financial report)
- Order details Admin Site > **People** tab > a participant > **Order history** tab > required order)
- Family view financial statement (Admin Site > People tab > a participant (family view) > Download

financial statement)

• Emails (confirmation email, recipient email and etc.)

Enhancements

FAQ link update

The Admin Site > **Finance** tab > **Frequently asked questions** section > "**How do I change the name my checks are made out to?**" question link now opens the correct "<u>Changing Payable Name</u>" help page