



Camp & Class Manager 10.13 Release Notes

Release Date

Tuesday, October 20th, 2020

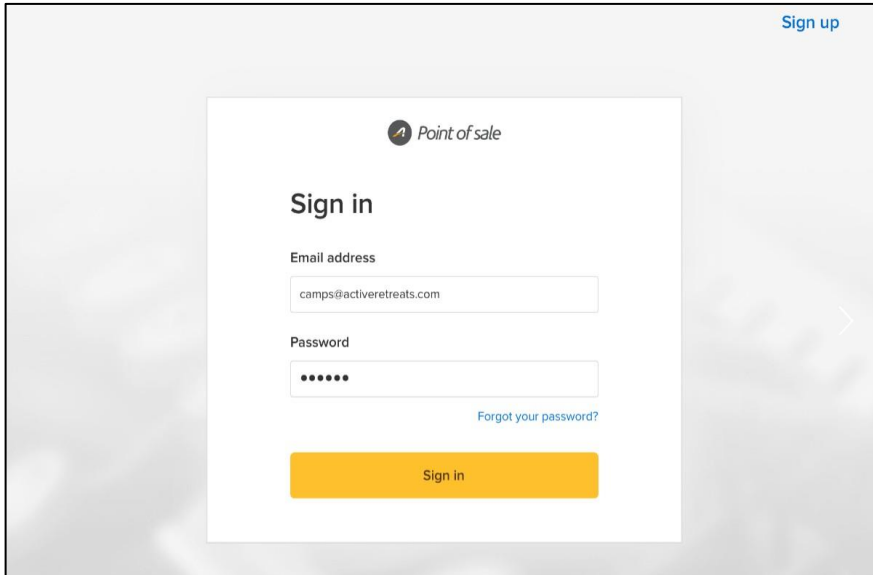
Release Overview

POS integration

Camp and Class Manager Release Notes

POS integration

Agencies can now sell session merchandise to in-person consumers using the ACTIVE POS tablet app. Once the **POS integration** feature is enabled, agency sessions that include merchandise items (including both active and completed sessions) are synchronized with the ACTIVE POS app. Agency users can use their CCM agency login credentials to login to the ACTIVE POS app:

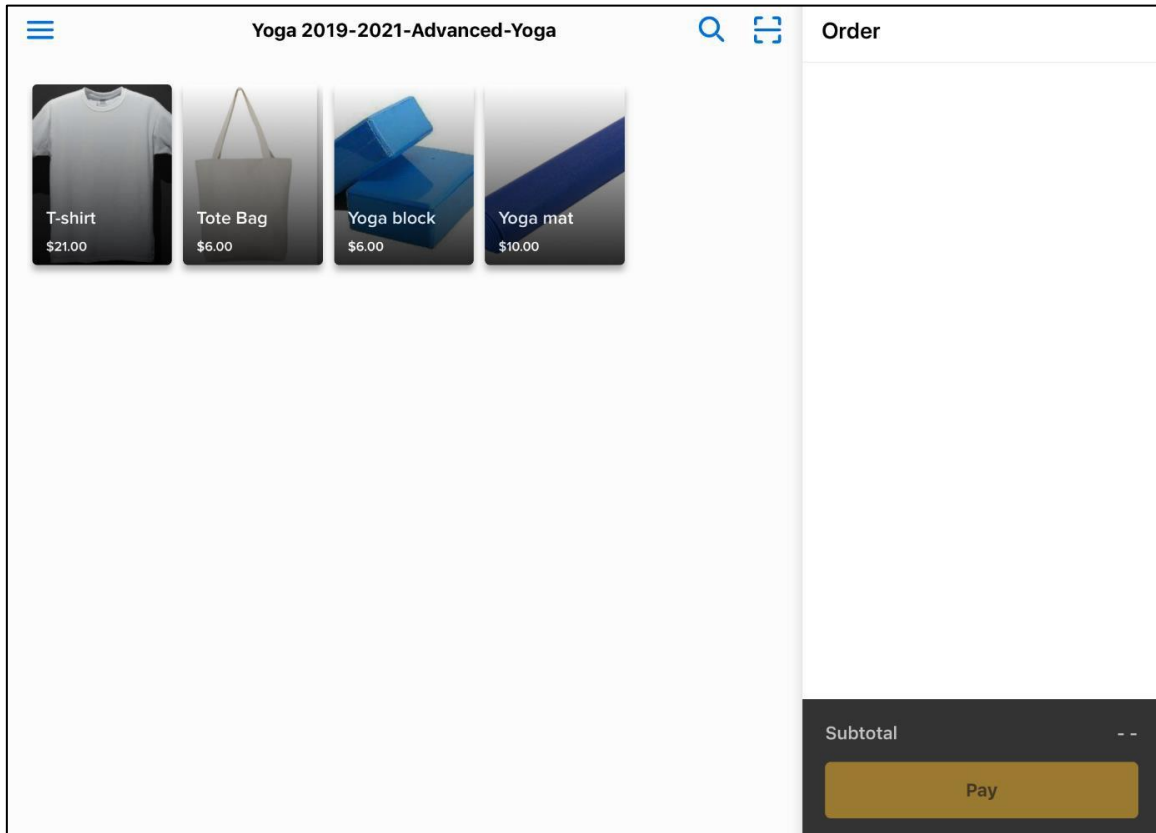


Note: Synced sessions are listed on the ACTIVE POS app **Select session** screen (by default, current sessions are displayed) and agency users must select a session before making any sales. Agency users can select a past session by tapping the **Current events** dropdown > **Past events**.

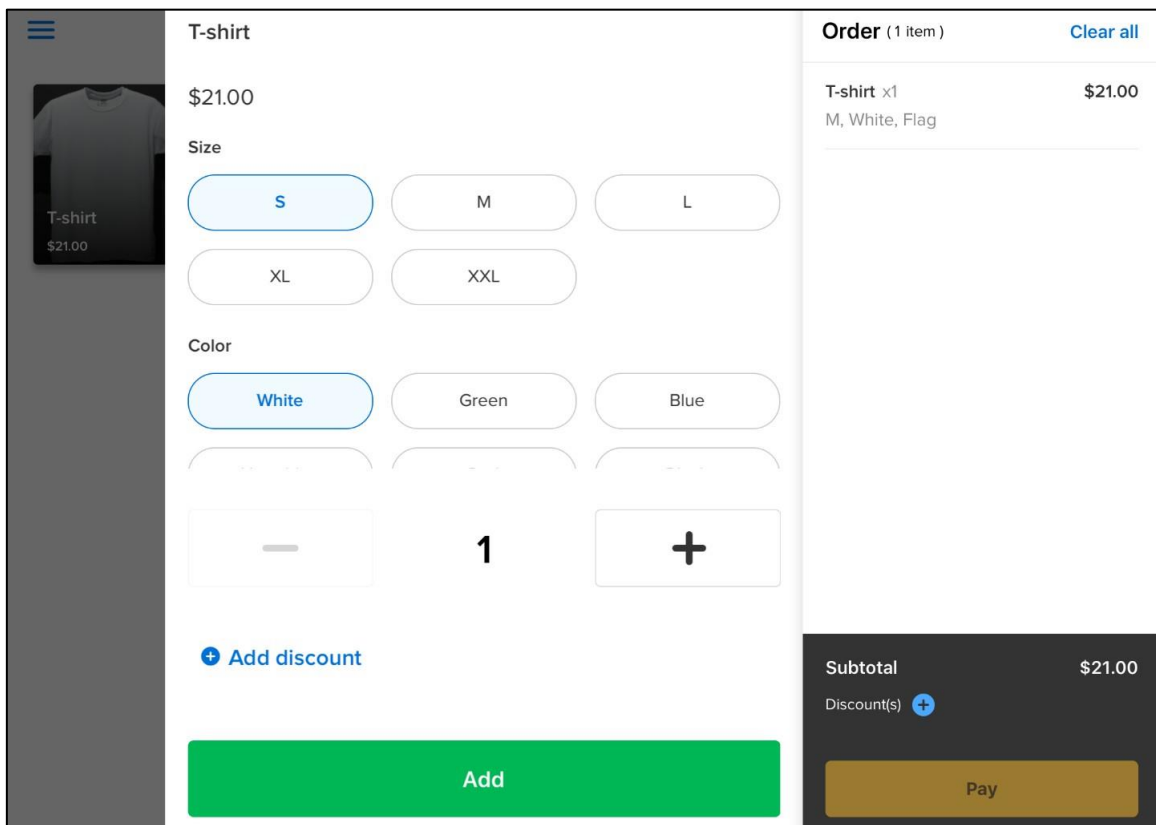
Select session			Current events ▾
Session name	Start date	End date	
Yoga 2019-2021-Beginner-Yoga	9/1/2019	11/2/2021	
Yoga 2019-2021-Yoga for Girls!	10/1/2019	12/16/2021	
Yoga 2019-2021-Advanced-Yoga	11/1/2019	1/31/2021	✓
Fashion 101-Fashion Me now part 8	9/1/2020	4/30/2022	
Fashion 101-Fashion me now part 1	9/16/2020	11/11/2022	
Fashion 101-Fashion Me now part 5	10/31/2020	12/31/2022	
Fashion 101-Fashion Me now part 6	10/31/2020	1/1/2023	

Camp and Class Manager Release Notes

- On the merchandise sales screen, only active merchandise items for the selected session are displayed and available for sale:



- Agency users can add an item to the order by tapping the required item. If an item has variants or different tiers of variants (e.g. size and color), then agency users must tap the item and then tap the required variant:



Camp and Class Manager Release Notes

- Changes to a season, session or merchandise item in CCM (including editing a season/session/merchandise item, adding or removing a merchandise to/from a session, copying a season/session or deleting or deactivating a season/session/merchandise) are synchronized with the ACTIVE POS app and updated accordingly on the **Select session** and merchandise sales screens.
 - If a merchandise item has been sold in the ACTIVE POS app, then it CANNOT be deleted in CCM.

When agency users review stock information on the CCM **Home Tab > Add-ons > Merchandise > a merchandise item > Edit merchandise item** page, the following fields now track merchandise sold in the ACTIVE POS app (at both the merchandise-level and variant-level, if any):

- **Number sold**
- **Remaining**
- **Dollar amount sold**

The screenshot displays the 'Add-ons' interface for editing a merchandise item. At the top, a summary box shows '0 Number sold', '2000 Remaining', and '\$0.00 Dollar amount sold'. Below this, the 'Item details' section shows the item name 'T-shirt' and a '43 ch...' label. The 'Variants' section includes a search bar and filters for Color, Size, and Status. A table lists four variants, all with a price of \$10.00 and 100 units remaining. The 'Number sold' column for all variants is currently 0.

Color	Size	SKU	Price	Quantity	Number sold	Remaining
White	S		\$ 10.00	100	0	100
White	M		\$ 10.00	100	0	100
White	L		\$ 10.00	100	0	100
White	XL		\$ 10.00	100	0	100

Camp and Class Manager Release Notes

Similarly, the availability of merchandise items in the following workflows reflects changes in stock quantities due to ACTIVE POS app sales (if the ACTIVE POS app oversells a merchandise item, then the item ceases to be available for purchase):

- Home Tab > **Actions** > **Register someone** workflow
- Home Tab > **People** tab > a person > **Order history** tab > an **Order number** link > **Actions** dropdown > **Edit purchases** and **Transfer** workflows
- Registration Page > consumer registration workflow
- Online Account > **ADD PURCHASE** workflow

POS merchandise sales are recorded in the **Finance** tab > **Reports** tab > **ACTIVE account statement** >:

- **Summary** report:
 - Agency users may filter the report to include only POS transactions by selecting the **For season** dropdown > **POS** option.
 - The **Credit card activity** section includes contributions from POS transactions.
 - The new **POS purchases activity** section (displayed only if the selected remittance period has POS transactions) includes **Registration fees paid by organization** and **Sales tax paid by organization** from POS transactions (these amounts are negative as they are withheld by ACTIVE).
- **Detailed Report** > **Payment activity** tab:
 - Includes POS transactions (**Season** is marked as **POS**).

The screenshot displays the ACTIVEworks Camp & Class Manager interface. The main heading is "ACTIVE account statement". Below this, there are navigation tabs: Home, People, Finance, Email, and Add-ons. The "Finance" tab is selected. A breadcrumb trail shows: Home > Finance > Reports > ACTIVE account statement. There are buttons for "Run report", "Share", and "Export".

The "Summary" section shows the "Statement time period" as "September 1 - 15, 2020". A dropdown menu for "For season" is set to "POS". Below this, there are sections for "Credit card activity", "Registration activity", and "POS purchases activity". The "POS purchases activity" section is highlighted with a red box and contains the following items:

Item	Amount
Registration fees paid by organization	(\$6.52)
Sales tax paid by organization	(\$0.48)

The "Total amount" is \$89.05. Below the summary is the "Detailed Report" section, which has tabs for "Payment activity", "Registration activity", and "POS purchases activity". The "POS purchases activity" tab is selected, and a table shows a transaction with "Season" set to "POS".

Date	Order Number	Customer	Season	Payment method	Processing fee	Type	Amount	Allocated to
09/09/2020	C-76X5KBRGKOT		POS	Visa	(\$3.95)	Payment	\$100.00	

At the bottom of the screenshot, there is a note: "All date/times posted in UTC time zone. Learn more".

Camp and Class Manager Release Notes

- **Detailed Report > POS purchases activity tab:**
 - Lists all POS orders and their corresponding details:

Detailed Report						
Payment activity	Registration activity	POS purchases activity				
Date	Order number	Item name	Payment method	Processing fee paid b...	Sales tax paid by orga...	Purchase amount
09/09/2020	C-76X5KBRGKQT	Merchandise_Tshirt	Visa	(\$6.52)	(\$0.48)	\$100.00
				(\$6.52)	(\$0.48)	\$100.00

All data/times posted in UTC time zone. Learn more

If agency users **Export** the **ACTIVE account statement**, then the above information (including the new **POS purchases activity** tab) is included in the exported report file:

A	B	C	D	E	F	G	H	I	J
1	ACTIVE account statement								
2	Statement time period	September 1 - 15, 2020							
3	Season:	POS							
4									
5	Credit card activity								
6	Credit card payments	\$100.00							
7	Credit card refunds	\$0.00							
8	Credit card processing fees	-\$3.95							
9									
10	POS purchases activity								
11	Registration fees paid by organization	-\$6.52							
12	Sales tax paid by organization	-\$0.48							
13	Total amount	\$96.05							
14									

Account Summary Payment activity POS purchases activity

A	B	C	D	E	F	G	H	I	J
1	Date	Order Number	Customer	Season	Payment method	Processing fee	Type	Amount	Allocated to
2	09/09/2020 1:39:58 AM	C-76X5KBRGKQT		POS	Visa	-\$3.95	Payment	\$100.00	
3	Total					-\$3.95		\$100.00	
4									
5									

Account Summary Payment activity POS purchases activity

A	B	C	D	E	F	G	
1	Date	Order Number	Item Name	Payment method	Processing fee paid by organization	Sales tax paid by organization	Purchase amount
2	09/09/2020	C-76X5KBRGKQT	Merchandise_Tshirt	Visa	-\$6.52	-\$0.48	\$100.00
3	Total				-\$6.52	-\$0.48	\$100.00
4							
5							

Account Summary Payment activity POS purchases activity

Note: As POS transactions are not associated with any sessions (just as for memberships), they are NOT included in the **Finance tab > Reports tab > ACTIVE account statement link > Run report dropdown > Session summary report, Session type summary report and Allocation report.**

Due to performance issues, POS transactions are NOT included in **Finance tab > Reports tab > New custom financial reports.**