



ActiveNet Training Plan

TO DEVELOP TRAINING TOOLS AND GUIDES THAT WILL HELP
STAFF USE OUR SYSTEM TO ITS FULL POTENTIAL
JUSTIN GOULET

PLAN SUMMARY

Note: This is an overview plan. Detail is in pages following

Customers

- Account Creation
- Modify Accounts

Organizations

- Lookup Organization
- Create New

POS

- Add Products to Receipt
- Process Payments
- Attach Customer to Payment

Facility Reservations

- View Existing Permit
- Resource Scheduler
- Permit Payment

Reports

- Cash Out Report
 - Summary/Detailed
- Reprint Receipt
- Attendance Rosters
- Detailed Class Lists (Roster Breif)

Last Updated: March 6, 2016

CUSTOMERS

Our customers are the heart of our organization. Without them, we don't have a purpose. It is imperative to serve the community in the most knowledgeable way possible.

In this section, we will discover our system from both the client and staff perspective. This will help our staff better understand the views the client is looking at while on the phone seeking help.

Client View

Account Creation

Family History

Family Schedule

Shopping Cart

Wish Lists

Account Balance

Add Family Members

Staff View

Account Creation

Modify Information

Residency

Account Balance

Add Family Members

Merging Accounts

Unlock Accounts

Last Updated: March 6, 2016

ORGANIZATIONS

Other organizations use our facilities on a daily basis.
Managing them is easy.

Now that they have learned how to create a client's account, they will now learn how to create a new organization and how to attach their new client to this organization

Organization View

Change Details

Managing Authorized Agents

Account Balance

Previous Transactions

Upcoming Events

Staff View

Change Details

Searching for Organizations

Managing Authorized Agents

Account Balance

Previous Transactions

Merge Organizations

Note: I have never seen the organization side from their POV

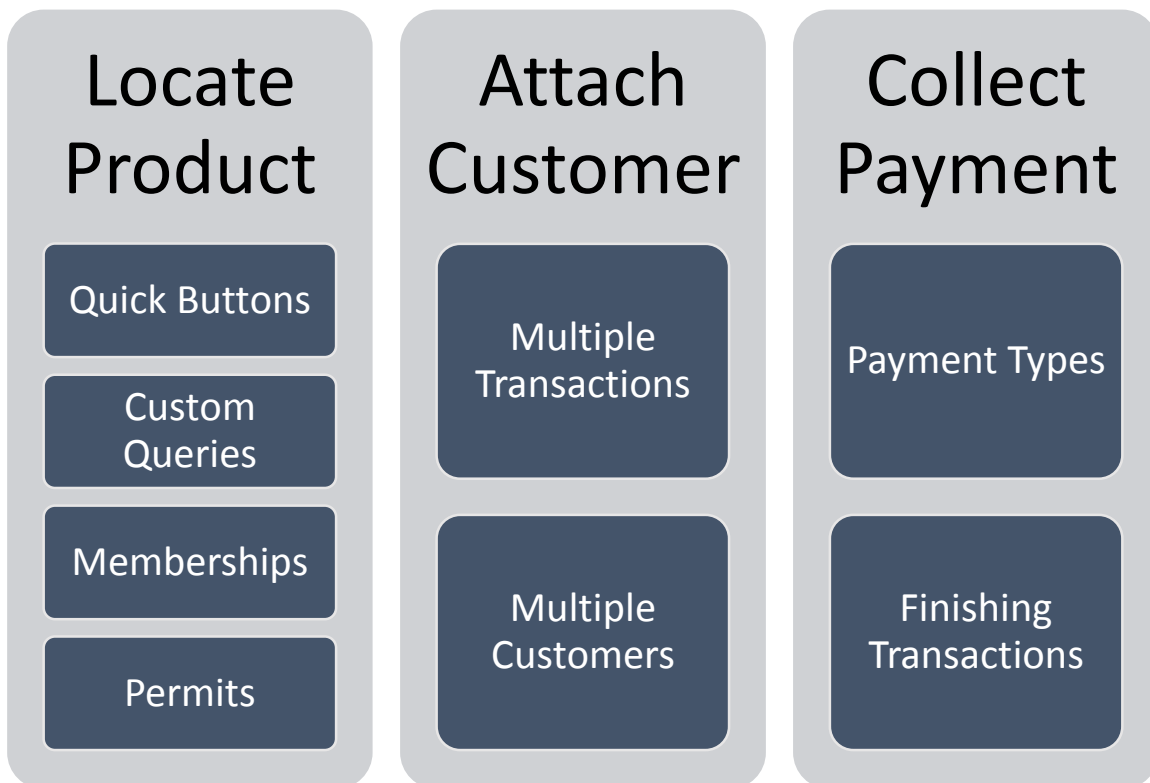
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POINT OF SALE (POS)

A critical part to processing simple sales on a daily basis.

Apart from managing clients and/or their organizations, POS allows staff to input regular transactions into the system from any terminal.

Note that this section is only staff



Discussion: I will need to speak with other staff at other centers about POS due to its limited use at Calavera and Stagecoach Parks (Lighting, Open Play and Kidz Camp T-Shirts). We can add as needed.

Last Updated: March 6, 2016

FACILITY RESERVATIONS

Clients use facilities on a regular basis. Creating a permit for a client can take around 15 minutes. Modifying an existing one is even easier.

We want our clients to complete tasks on their own, but we know this feat is not completely possible. Clients may, and will, ask for help from any center at any time. This is an overview of some options.

Creating Permits

Resource Scheduler

Attaching a Client

Custom Questions

Additional Charges

Payment Options

Modifying Permits

Locate Existing Permit

Additional Charges

Changing Dates

Changing Status

Changing Client

Payment Options

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REPORTS

With the many transactions staff completes on a daily basis, learning how to run and use reports is a great benefit for quick reference and procedural documentation.

Reports cover a wide variety of references, from rosters to financial information, which are necessary to complete on regular intervals. Staff will be trained on many of the reports which

Reports

Cash Out Report

Attendance Rosters

Detailed Class Lists

Membership
Transactions

Receipts

Previous Transactions

Tax Receipt

- (Haven't used, but useful)

A/R Aging

Discussion: Most front desk staff will not be running these reports on a daily basis. The reports that staff should have knowledge of are mainly just Receipts and Cash Out.

Last Updated: March 6, 2016

TIMELINE



Discussion: Dates are subject to change depending on content added. I wish to remain close to these deadlines as we progress through the trainings.

Last Updated: March 6, 2016