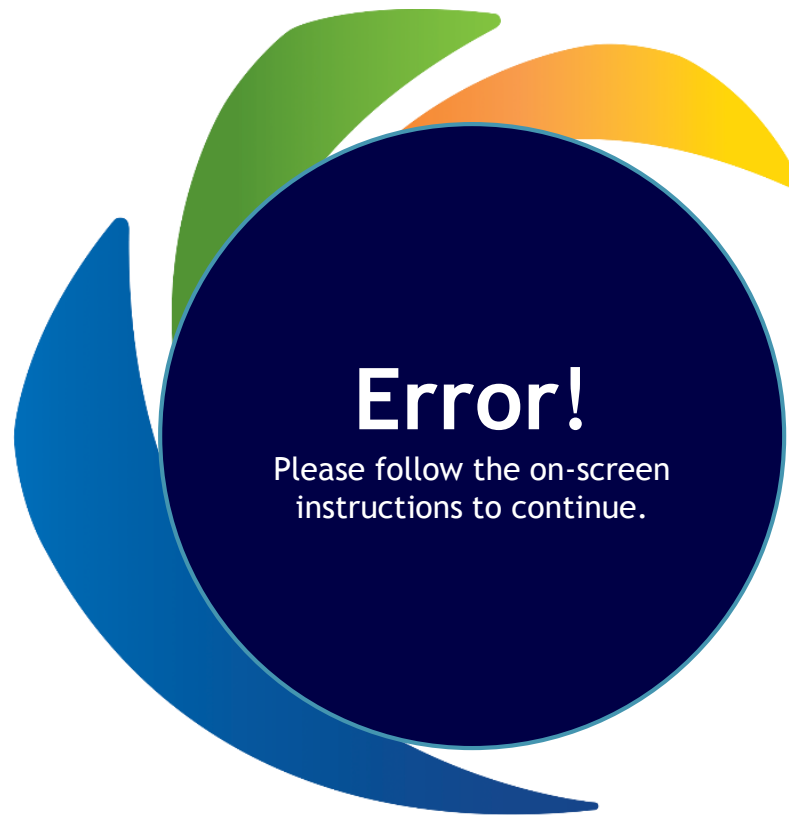




Enrollment Transfer

[Click to Begin](#)



Error!

Please follow the on-screen
instructions to continue.

Go Back



Complete

Please navigate to the next module
in the course to continue.

[Restart Course](#)

Receipt Actions

▶ Registration

[Enroll](#)[Enroll from Waiting List](#)[Transfer](#)

▶ POS

[Sell](#)

▶ Reserve

[Reserve Facility](#)[Schedule Reservations](#)[Refund Payments](#)

▶ Refund/Withdraw

[Refund/Withdraw Transaction](#)

▶ Membership

[Renew Membership](#)[Sell Membership](#)

▶ Account Actions

[Refund from Account](#)[Pay on Account](#)

▶ Donation

[Make Donation](#)

Trainer Site

Pay

Finish

Cancel

Tip:

Select Transfer

In order to transfer a client, they must be currently enrolled in a program.

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Registration » Activity Transfer

Transfer Enrollment

[Help](#)

Find Transaction

Receipt Number First Name Email Address Middle Name Phone () Last Name ☐ Sounds likeCell Phone () Family Name Retired ▾Address City, State, Zip Code ▾ Scan Card Customer ID Membership Pass Number

Find Activity To Transfer Into (Status=Open)

[Cancel](#)**Tip:***Input the First Name*



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Front Desk Menu

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

[Pending Receipt #2](#) » [Registration](#) » [Activity Transfer](#)

Transfer Enrollment

[Help](#)

Find Transaction

Receipt Number First Name Email Address Middle Name Phone () Last Name ☐ Sounds likeCell Phone () Family Name Retired ▾Address City, State, Zip Code ▾ Scan Card Customer ID Membership Pass Number

Find Activity To Transfer Into (Status=Open)

[Cancel](#)**Tip:***Input the Last Name*

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕

Pending Receipt #2 » Registration » Activity Transfer

Transfer Enrollment

[Help](#)

Find Transaction

Receipt Number First Name Email Address Middle Name Phone () Last Name ☐ Sounds likeCell Phone () Family Name Retired ▾Address City, State, Zip Code ▾ Scan Card Customer ID Membership Pass Number

Find Activity To Transfer Into (Status=Open)

[Cancel](#)**Tip:***Search for the patron*

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Registration » Activity Transfer

Transfer Enrollment

[Help](#)[Find Transaction](#) (First=Justin, Last=Goulet)[Find Activity To Transfer Into](#) (Status=Open)

▼ Customer List

<u>Name</u>	<u>Address</u>	<u>Phone</u>	<u>Email</u>	<u>Date of Birth</u>	<u>Family</u>
Justin A. Goulet		H: -- W: (760) 602-4680	carlsbadconnect@carlsbadca.gov	Jun 1, 1994	Goulet (#1324)

[Cancel](#)**Tip:**

Select the patron from the list.

If there are multiple accounts, have the client verify a distinguishing factor.



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Front Desk Menu

- ▶ Favorites
- ▶ FlexReg/Private Lessons
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- ▶ Population
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- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Registration » Activity Transfer

Transfer Enrollment

Help

[Find Transaction](#) (Transactions for Customer: Justin A. Goulet)[Find Activity To Transfer Into](#) (Status=Open)

▼ Select Transaction for Activity Transfer

Description	Transaction Type	Date	Receipt	Customer
Volleyball: Coed Four-Person - Men 01 #22340	Enroll	Sep 28, 2016	1234638.002	Justin A. Goulet

[Cancel](#)**Tip:**

Select the course the clients wishes to withdraw from.
You may also see the original receipt.



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- ▶ FlexReg/Private Lessons
- ▶ Membership
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- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Registration » Activity Transfer

Transfer Enrollment

Help

▶ [Find Transaction](#) (Transactions for Customer: Justin A. Goulet)▶ [Find Activity To Transfer Info](#) (Status=Open)

Carlsbad Parks & Recreation

799 Pine Avenue
Suite 200
Carlsbad, CA 92008
Phone:(760) 434-2826
Fax:(760) 434-5088
Email:carlsbadconnect@carlsbadca.gov

Receipt Number: 1234638.002

Prepared By: Intern Trainer

Sep 28, 2016 11:23 AM

▼ Transactions

Customer

Justin A. Goulet
1462 Countryview Lane
Vista, CA 92081
Home phone: --
Email: carlsbadconnect@carlsbadca.gov
ID: 2902

Description

Volleyball: Coed Four-Person - Men 01 #22340

Action: [Enroll](#)

No class Oct. 31

Enrollment Effective Date: Sep 28, 2016

Meets: From October 17, 2016 to December 12, 2016

Each Monday from 6:30pm to 9:30pm

Except the following dates:

Monday, October 31, 2016

Location: [Calavera Hills: Gymnasium Court 1](#) at [Calavera Hills Community Center & Park](#)

Payments

Goulet
Countryview Lane
92081

Home: --
Work: (760) 602-4680

Charge Item

Unit

Qty

Unit Fee

Charge

Activity
Registration
Fee

Per Seat

1.00

\$87.00

\$87.00

Payment Type

Amount

Cash

[Cancel this payment](#)

\$87.00

Tip:

Collapse the receipt to continue



Front Desk



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Front Desk Menu

- ▶ Favorites
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- ▶ Membership
- ▶ Population
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- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Activity Transfer

Transfer Enrollment

Help

▶ Find Transaction (Transaction: Volleyball: Coed Four-Person - Men 01 #22340)

▼ Find Activity To Transfer Info

Activity Name

Activity Number

Center

Facility [Remove](#)

Season

Term

Start Date/Time From: To:

Department

Category

Age Range

Activity Type

Supervisor

Instructor

Site

Status

Include

Participant's Age e.g., 1 or 1.5 (years)

Search

[Cancel](#)**Tip:***Search for an activity to enroll*



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- ▶ Favorites
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- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Activity Transfer

Transfer Enrollment

Help

▶ Find Transaction (Transaction: Volleyball: Coed Four-Person - Men 01 #22340)

▼ Find Activity To Transfer Info

Activity Name

Activity Number

Center

Facility [Remove](#)

Season

Term

Start Date/Time From: To:

Department

Category

Age Range

Activity Type

Supervisor

Instructor

Site

Status

Include

Participant's Age e.g., 1 or 1.5 (years)

Search

[Cancel](#)**Tip:***Click to search*



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Front Desk Menu

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- ▶ Refund
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- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Activity Transfer

Transfer Enrollment

Help

▶ [Find Transaction](#) (Transaction: Volleyball: Coed Four-Person - Men 01 #22340)▶ [Find Activity To Transfer Info](#) (Name=Volleyball, Status=Open)▼ [Select Activity](#)

Name	Number	Open	Enr	W/L	Starting Day	Begins	Ends	Wks	Ages	Type
Volleyball: Coed Four-Person - Men 01	22340	7	13	0	Mon	Oct 17, 2016 6:30 PM	Dec 12, 2016	8	18 and up	Standard Activity
Volleyball: Coed Four-Person - Men 02	22341	12	8	0	Mon	Jan 30, 2017 6:30 PM	Mar 27, 2017	8	18 and up	Standard Activity
Volleyball: Coed Four-Person - Women 01	22342	2	10	0	Mon	Oct 17, 2016 6:30 PM	Dec 12, 2016	8	18 and up	Standard Activity
Volleyball: Coed Four-Person - Women 02	22343	5	7	0	Mon	Jan 30, 2017 6:30 PM	Mar 27, 2017	8	18 and up	Standard Activity
Volleyball: Coed Inter. / Adv. - 01	22345	30	0	0	Mon	Sep 12, 2016 6:30 PM	Nov 7, 2016	7	18 and up	Standard Activity
Volleyball: Coed Inter. / Adv. - 02	22346	30	0	0	Mon	Nov 14, 2016 6:30 PM	Dec 12, 2016	5	18 and up	Standard Activity
Volleyball: Coed Inter. / Adv. - 03	22347	30	0	0	Mon	Jan 9, 2017 6:30 PM	Mar 6, 2017	7	18 and up	Standard Activity
Volleyball: Coed Inter. / Adv. - 04	22348	30	0	0	Mon	Mar 13, 2017 6:30 PM	Apr 24, 2017	7	18 and up	Standard Activity
Volleyball: Women's Inter.&Adv. - 01	22350	23	2	0	Wed	Sep 7, 2016 10:30 AM	Oct 19, 2016	7	18 and up	Standard Activity
Volleyball: Women's Inter.&Adv. - 02	22351	24	1	0	Wed	Oct 26, 2016 10:30 AM	Dec 14, 2016	7	18 and up	Standard Activity
Volleyball: Women's Inter.&Adv. - 03	22352	25	0	0	Wed	Jan 4, 2017 10:30 AM	Feb 22, 2017	8	18 and up	Standard Activity
Volleyball: Women's Inter.&Adv. - 04	22353	25	0	0	Wed	Mar 1, 2017 10:30 AM	Apr 26, 2017	8	18 and up	Standard Activity

[Cancel](#)**Tip:**

Select the course in which to enroll
In this case, select Volleyball: Coed Four-Person - Men 02



Front Desk



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- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Activity Transfer

[Find Transaction](#) (Transaction: Volleyball: Coed Four-Person - Men 01 #22340)[Find Activity To Transfer Info](#) (Selected: Volleyball: Coed Four-Person - Men 02)

▼ Credit Fees

▼ Fees

Include?	Description	Original Charge	Original Discount	Prorated Charge	Prorated Discount	Amount Paid	Owed	Refund
<input checked="" type="checkbox"/>	Volleyball: Coed Four-Person - Men 01 #22340-Activity Registration Fee *	87.00	0.00	0	0	87.00	0	87.00
Financial Aid								0
Total Amount to Retain								0
Total Refund Amount								87.00

▼ Withdrawal Date

Date The date will be the customer's last date of attendance and will be used to calculate proration.

▼ Transfer Reasons

Select from the reasons list or enter the customer's reasons for transferring.

Reasons: [Staff Notes](#)[Customer Notes](#)[Guides](#)**Tip:***Select a reason for transfer*

▼ Credit Fees

Fees

[illegible]

It will be the customer's last date of attendance and will be used to calculate proration.

ner's reasons for transferring.

Staff Notes

Customer Notes

rides

In our case, we are just doing an activity transfer.



Front Desk



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- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Activity Transfer

[Find Transaction](#) (Transaction: Volleyball: Coed Four-Person - Men 01 #22340)[Find Activity To Transfer Info](#) (Selected: Volleyball: Coed Four-Person - Men 02)

▼ Credit Fees

▼ Fees

Include?	Description	Original Charge	Original Discount	Prorated Charge	Prorated Discount	Amount Paid	Owed	Refund
<input checked="" type="checkbox"/>	Volleyball: Coed Four-Person - Men 01 #22340-Activity Registration Fee *	87.00	0.00	0	0	87.00	0	87.00
Financial Aid								0
Total Amount to Retain								0
Total Refund Amount								87.00

▼ Withdrawal Date

Date The date will be the customer's last date of attendance and will be used to calculate proration.

▼ Transfer Reasons

Select from the reasons list or enter the customer's reasons for transferring.

Reasons: [Staff Notes](#)[Customer Notes](#)[Guides](#)**Tip:***Collapse the Transfer Reasons section.*



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Front Desk Menu

- ▶ Favorites
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- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Activity Transfer

Transfer Enrollment

Help

[Find Transaction](#) (Transaction: Volleyball: Coed Four-Person - Men 01 #22340)[Find Activity To Transfer Info](#) (Selected: Volleyball: Coed Four-Person - Men 02)

▼ Credit Fees

▼ Fees

Include?	Description	Original Charge	Original Discount	Prorated Charge	Prorated Discount	Amount Paid	Owed	Refund
<input checked="" type="checkbox"/>	Volleyball: Coed Four-Person - Men 01 #22340-Activity Registration Fee *	87.00	0.00	<input type="text" value="0"/>	0	87.00	0	<input type="text" value="87.00"/>
Financial Aid								0
Total Amount to Retain								0
Total Refund Amount								87.00

▼ Withdrawal Date

Date The date will be the customer's last date of attendance and will be used to calculate proration.[Transfer Reasons](#)[Staff Notes](#)[Customer Notes](#)[Overrides](#)

Refund

Cancel

Tip:*Refund the full amount to apply to transfer*

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2

Pending Receipt #2 » Activity Transfer

Transfer to Fees

Registration Effective Date

Date Sep 28, 2016

Fees

Include?	Charge Name
<input checked="" type="checkbox"/>	Activity Registration Fee*
<input type="checkbox"/>	Discount: Resident*

	Estimate	Actual
	87.00	87.00
	10.00%	0
Sub-Activity Total	87.00	
Tax	0.00	
Total Charges	87.00	
Pending Refund for Transfer From		(\$87.00)

[Recalculate Charges?](#)

Grand Total

0.00

* - Needs override authority to change

Override User

Password

[Staff Notes](#)

[Customer Notes](#)

Waiver to Waiver for Volleyball: Coed Four-Person - Men 02



Required	Description	Attachment
Yes	Participant Waiver	--
Yes	Refund Policy	Refund Policy

Enroll and Pay

Enroll

Back

Tip:

Ensure the client agrees to the waiver
The waiver contains Photographic and Release of Liability releases.

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
- ▶ Receipts
- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕

Pending Receipt #2 » Activity Transfer

▼ [Transfer to Fees](#)▼ [Registration Effective Date](#)Date Sep 28, 2016 ▼ [Fees](#)

Include?	Charge Name	Estimate	Actual
<input checked="" type="checkbox"/>	Activity Registration Fee*	87.00	<input type="text" value="87.00"/>
<input type="checkbox"/>	Discount: Resident*	10.00%	<input type="text" value="0"/>
Sub-Activity Total			<input type="text" value="87.00"/>
Tax			<input type="text" value="0.00"/>
Total Charges			<input type="text" value="87.00"/>
Pending Refund for Transfer From			<input type="text" value="(\$87.00)"/>

[Recalculate Charges?](#)▼ [Grand Total](#)

* - Needs override authority to change

Override User Password ▶ [Staff Notes](#)▶ [Customer Notes](#)

Consent to Waiver for Volleyball: Coed Four-Person - Men 02



Required	Description	Attachment
Yes	Participant Waiver	--
Yes	Refund Policy	Refund Policy

[Enroll and Pay](#)[Enroll](#)[Back](#)**Tip:**

Ensure the client agrees to the Refund Policy

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- ▶ FlexReg/Private Lessons
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- ▶ Refund
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- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕

Pending Receipt #2 » Activity Transfer

▼ Transfer to Fees

▼ Registration Effective Date

Date Sep 28, 2016 

▼ Fees

Include?	Charge Name
<input checked="" type="checkbox"/>	Activity Registration Fee*
<input type="checkbox"/>	Discount: Resident*

	Estimate	Actual
	87.00	<input type="text" value="87.00"/>
	10.00%	<input type="text" value="0"/>
Sub-Activity Total		<input type="text" value="87.00"/>
Tax		<input type="text" value="0.00"/>
Total Charges		<input type="text" value="87.00"/>
Pending Refund for Transfer From		<input type="text" value="(\$87.00)"/>

[Recalculate Charges?](#)

▼ Grand Total

* - Needs override authority to change

Override User Password

▶ Staff Notes

▶ Customer Notes

Consent to Waiver for Volleyball: Coed Four-Person - Men 02



Required	Description	Attachment
Yes	Participant Waiver	--
Yes	Refund Policy	Refund Policy

[Enroll and Pay](#)[Enroll](#)[Back](#)**Tip:****Enroll and Pay**



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Admin

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- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #2 ✕ +

Pending Receipt #2 » Receipt Payment

Receipt Payment

Help

Find Customer for Payer

Potential Customers

Justin A. Goulet ▾

Select

First Name

Email Address

Middle Name

Phone ()

Last Name

☐ Sounds like

Cell Phone ()

Family Name

Retired

 ▾

Address

Entered On or After



City, State, Zip Code



Search

Add New Customer

Add Family Member
(Based on Customer)

Justin A. Goulet ▾

Submit

Scan Card

Submit

Membership Pass Number

Submit

Find Organization

Cancel

Tip:*Select the Customer as the Payer*



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Front Desk * +

Pending Receipt for Justin A. Goulet

Pending Receipt for Justin A. Goulet

Help

Receipt Actions

Registration

[Enroll](#)
[Enroll from Waiting List](#)
[Transfer](#)

Reserve

[Reserve Facility](#)
[Schedule Reservations](#)
[Refund Payments](#)

Membership

[Renew Membership](#)
[Sell Membership](#)

Donation

[Make Donation](#)

POS

[Sell](#)

Refund/Withdraw

[Refund/Withdraw Transaction](#)

Account Actions

[Refund from Account](#)
[Pay on Account](#)

Trainer Site

Pay

Finish

Cancel

Payments

Type	Customer	Description	Payment
Payment Remove	Justin A. Goulet	No Money	\$0
Charges			\$0
Payments			\$0
Balance			\$0

Transactions

Action	Description	Customer	Fee	Amount
Transfer Remove	Volleyball: Coed Four-Person - Men 02, # 22341	Justin A. Goulet	\$87.00	Refund: (\$87.00) Charge: \$87.00
Starts: From January 30, 2017 to March 27, 2017 Each Monday from 6:30pm to 9:30pm Except the following dates: Monday, February 20, 2017 From: Volleyball: Coed Four-Person - Men 01 #22340				
Totals			\$87.00	\$0

Tip:

Finish the transaction

Notice that since the balance and the refund were equal, this is a non-monetary receipt.



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- ▶ Favorites
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- ▶ Active Support

Receipt #3022514.002 ✕

Front Desk Home » Receipt #3022514.002

Trainer Site

Carlsbad Parks & Recreation

799 Pine Avenue
Suite 200
Carlsbad, CA 92008
Phone: (760) 434-2826
FAX: (760) 434-5088
Email: carlsbadconnect@carlsbadca.gov

Print

Send Email

New Receipt

JUSTIN A. GOULET
1462 COUNTRYVIEW LANE
VISTA, CA 92081

Non-Monetary Receipt #3022514.002

Sep 28, 2016 12:00 PM



Prepared By: Intern Trainer
Customer ID: 2902

Transactions

Customer

Justin A. Goulet
1462 Countryview Lane
Vista, CA 92081
Home phone: --
Email: carlsbadconnect@carlsbadca.gov
ID: 2902

Description

Volleyball: Coed Four-Person - Men 01 #22340

Action: [Transfer Out](#)

No class Oct. 31

Withdrawal Date: Sep 28, 2016

Meets: From October 17, 2016 to December 12, 2016

Each Monday from 6:30pm to 9:30pm

Except the following dates:

Monday, October 31, 2016

Location:

[Calavera Hills: Gymnasium Court 1](#) at [Calavera Hills Community Center & Park](#)

Volleyball: Coed Four-Person - Men 02 #22341

Action: [Transfer In](#)

No class Feb. 20

Enrollment Effective Date: Sep 28, 2016

Meets: From January 30, 2017 to March 27, 2017

Each Monday from 6:30pm to 9:30pm

Except the following dates:

Monday, February 20, 2017

Location:

[Calavera Hills: Gymnasium Court 1](#) at [Calavera Hills Community Center & Park](#)

Item	Unit	Qty	Fee	Charge
Activity Registration Fee	Each	1.00	\$87.00	(\$87.00)

Activity Registration Fee	Per Seat	1.00	\$87.00	\$87.00
---------------------------	----------	------	---------	---------

Tip:

Send the client the receipt via email



Front Desk



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Admin

Front Desk Menu

- ▶ Favorites
- ▶ FlexReg/Private Lessons
- ▶ Membership
- ▶ Population
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- ▶ Refund
- ▶ Registrations
- ▶ Reserve
- ▶ Resource Scheduler
- ▶ Help Center
- ▶ Active Support

Receipt #3022514.002 ✕
Front Desk Home » Receipt #3022514.002

Trainer Site

Carlsbad Parks & Rec
799 Pine Avenue
Suite 200
Carlsbad, CA 92008
Phone: (760) 434-28
FAX: (760) 434-508
Email: carlsbadconn

JUSTIN A. G
1462 COUN
VISTA, CA 9

Transactions

Customer

Justin A. Goulet
1462 Countryview Lane
Vista, CA 92081
Home phone: --
Email: carlsbadconnect
ID: 2902

Justin A. Goulet
1462 Countryview Lane
Vista, CA 92081
Home phone: --
Email: carlsbadconnect@carlsbadca.gov

Meets: From January 30, 2017 to March 27, 2017
Each Monday from 6:30pm to 9:30pm
Except the following dates:
Monday, February 20, 2017

Location:

[Calavera Hills: Gymnasium Court 1](#) at [Calavera Hills Community Center & Park](#)

Email Receipt Confirmation

[Help](#)

Recipients

- # 1
- # 2
- # 3
- # 4
- # 5
- # 6
- # 7
- # 8
- # 9
- # 10

Send Email

Cancel

Monetary Receipt #3022514.002

Sep 28, 2016 12:00 PM



Prepared By: Intern Trainer
Customer ID: 2902

Unit	Qty	Fee	Charge
Each	1.00	\$87.00	(\$87.00)

Per Seat	1.00	\$87.00	\$87.00
----------	------	---------	---------

Tip:

Confirm the email and send