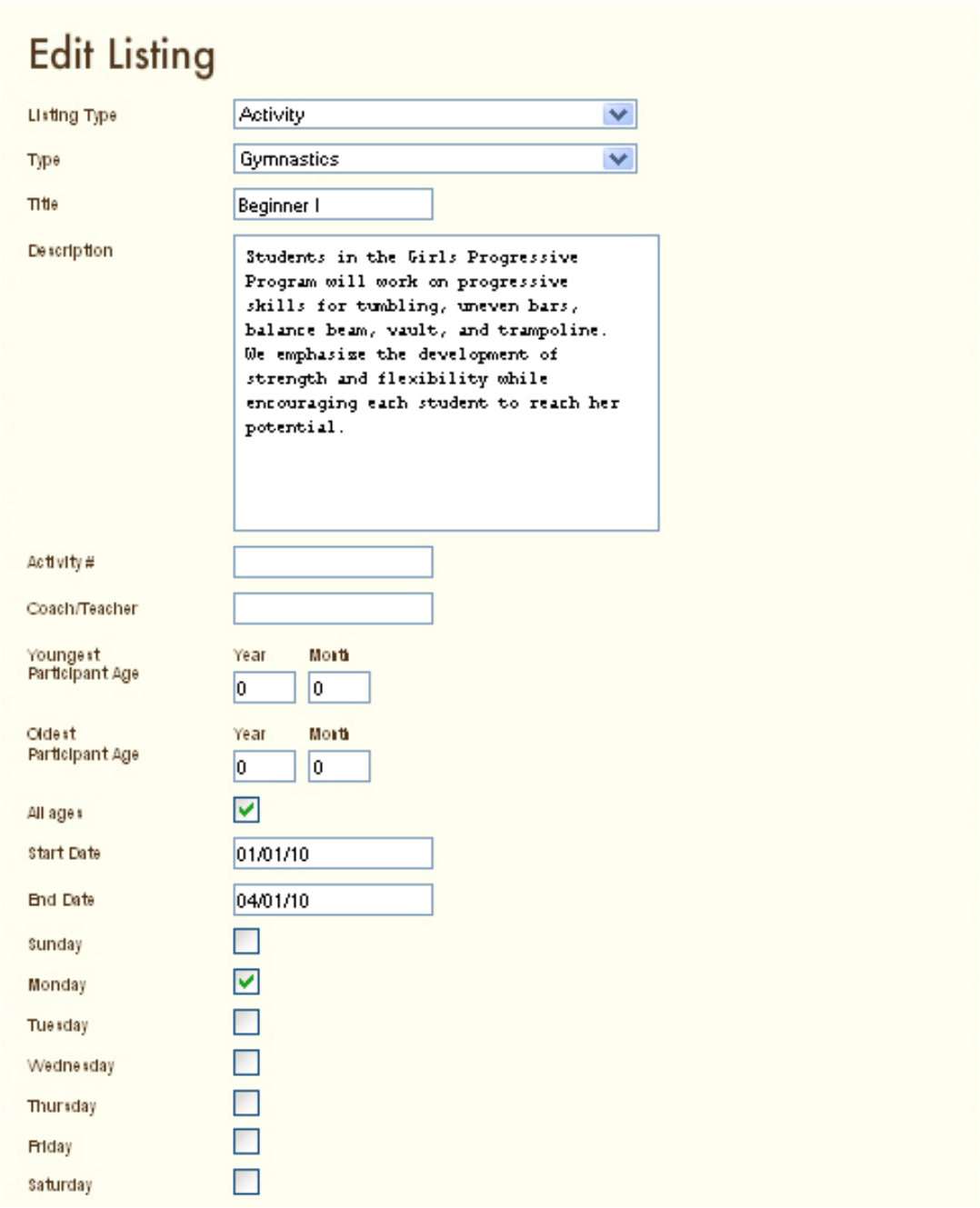
ActivityTree Provider Account Maintenance Guide

The Active Family's Place to Search, Register & Organize Activities.

ActivityTree.com

Editing a Listing

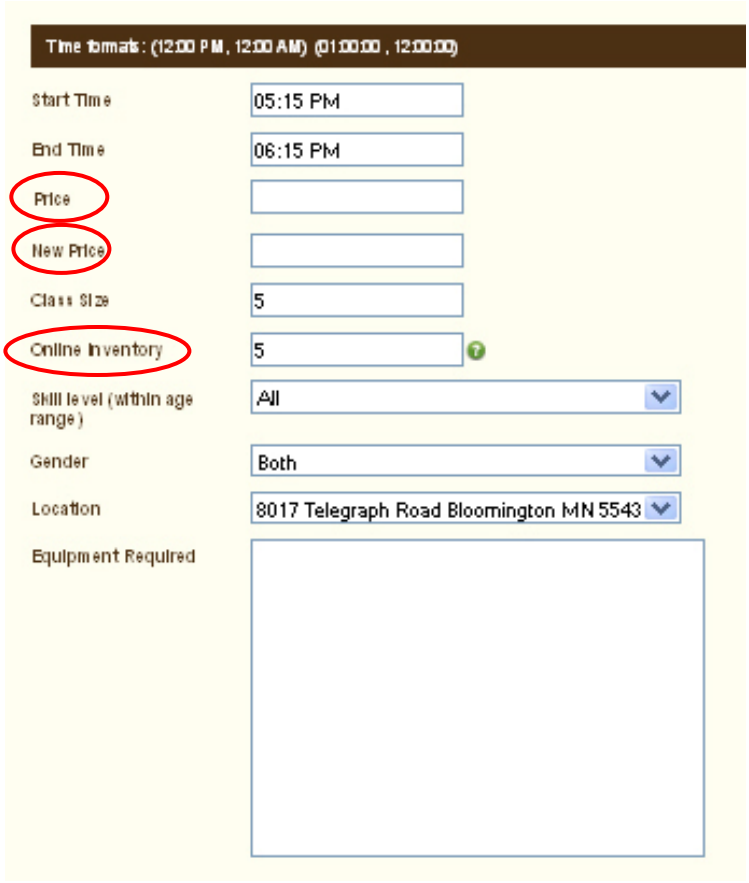
Click **Manage Listings** on the left navigation bar. Click Edit. Make changes to fields as necessary.



Editing Price

There are two price fields on the Edit Listing screen. Change the **Price** field if there is an error in the price entered, or you want to change the price without reflecting a discount or overriding other price promotions.

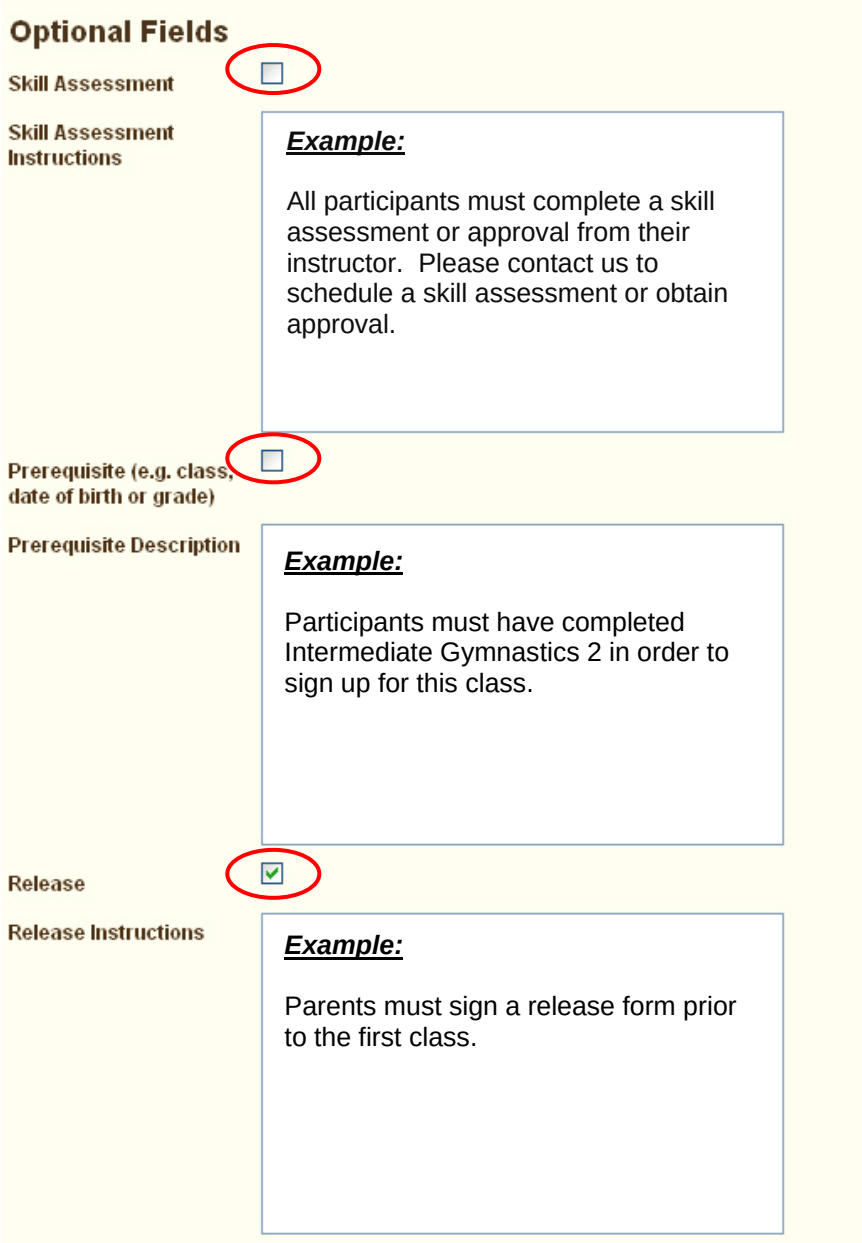
Change the New Price field if you want the price to be displayed in red as a discounted price to the customers. Adding a New Price will automatically override all price promotions for that listing, other than Member Discount.



Editing Online Inventory

To **Decrease** Online Inventory, reduce the original number. E.g. original Online Inventory = 5. Change Online Inventory to 4 to reduce Online Inventory by 1. To **Increase** Online Inventory, add to the original number. E.g. original Online Inventory = 5. Change Online Inventory to 6 to increase Online Inventory by 1. If you increase Online Inventory to a number greater than the class size, you will also need to adjust the class size.

Editing Optional Fields



- To add a skill assessment, check the box and give detailed instructions for your customers to follow for the required assessment (optional)

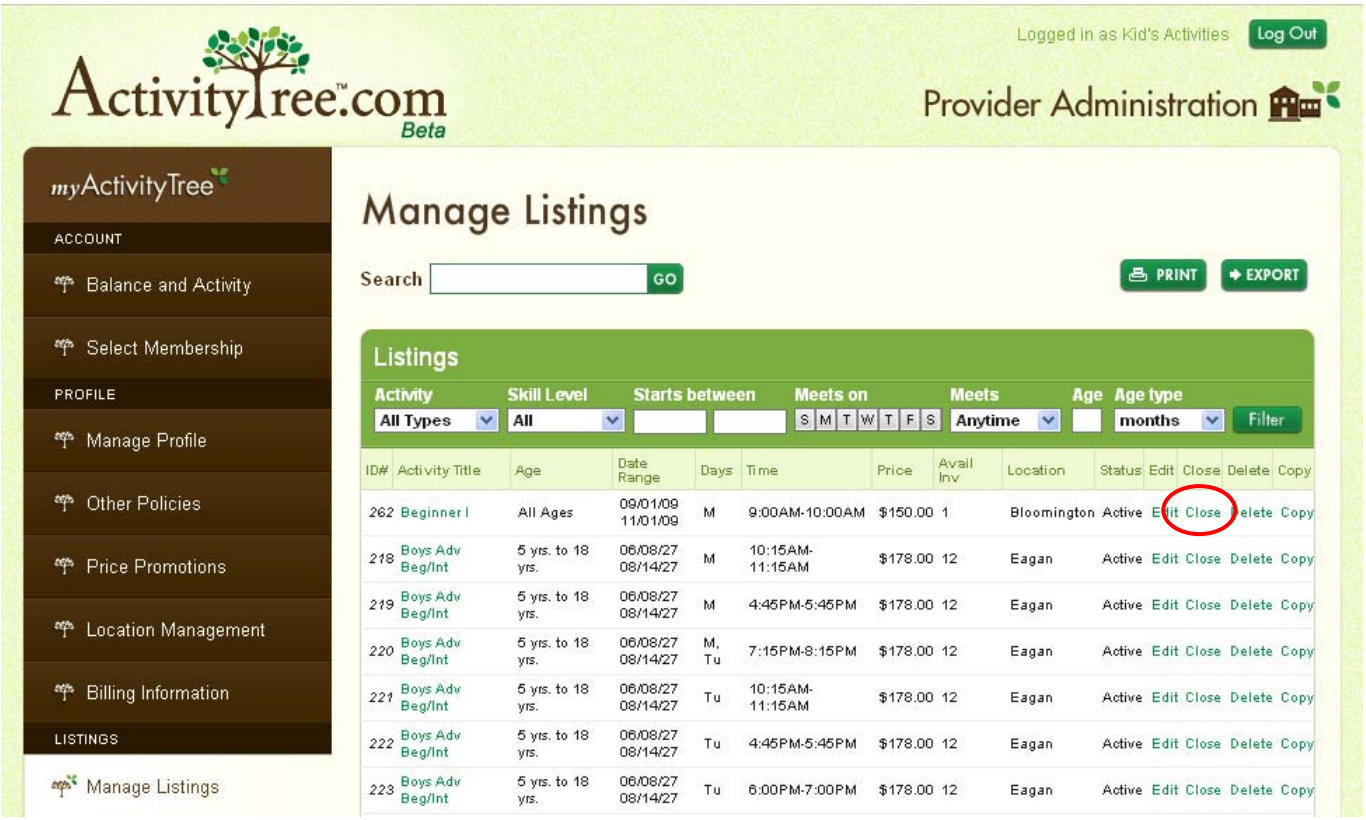
  If checked, the registration will be held, and the customer will not be charged, until you resolve the skill assessment issue. If you don't resolve, then registration is cancelled after 5 days.

- To add a prerequisite, place a check mark in the box and enter in a detailed description. (Optional)

- To add a release requirement, check the box and provide instructions to complete (Forms may be uploaded in **Manage Profile**) (Optional)

Closing a Listing

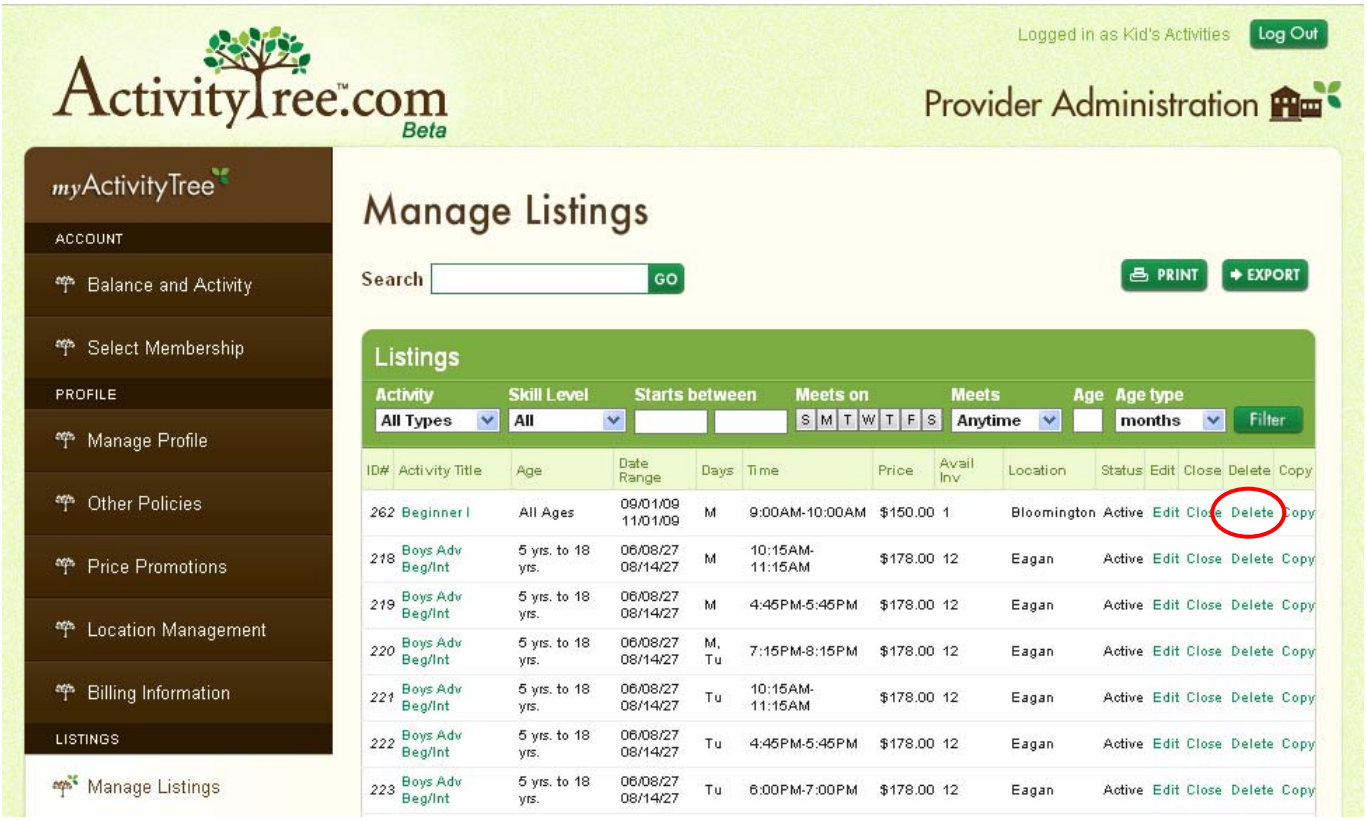
If a listing no longer has openings for registration, you can set the listing to “Full” by closing it in **Manage Listings**. We recommend that you close listings rather than deleting a listing. **Deleting a listing will cancel all related registrations and delete all related customer information.**



- Click **Manage Listings**
- Click Close

Deleting a Listing

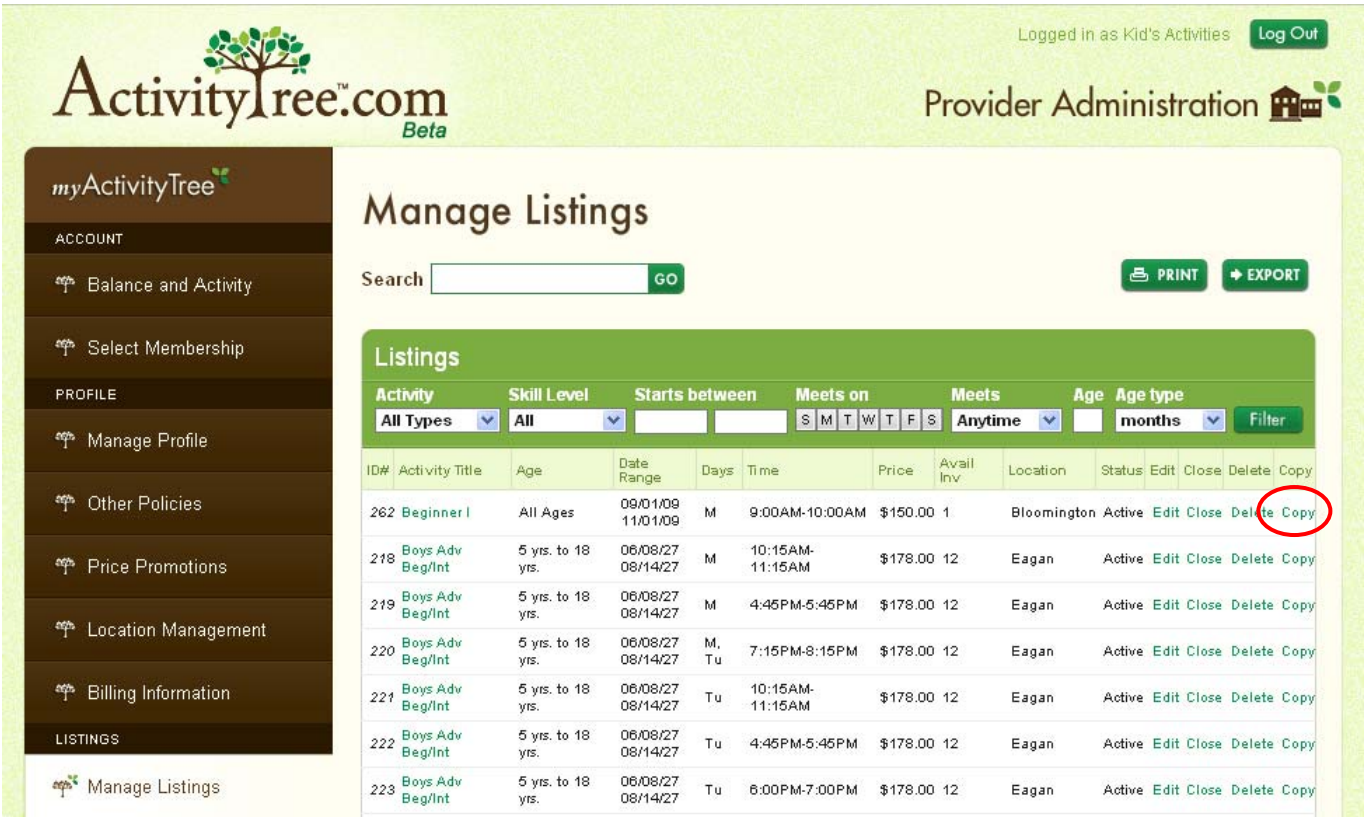
If a listing has been entered in error and does not have any registrations related to it, it can be deleted. NOTE: Deleting a listing will cancel all related registrations and delete all related customer information. If you want to just ensure customers do not register for the listing, we recommend that you Close the listing. If you do not want a customer to see a listing, but do not want to delete registrations or customer information, contact ActivityTree at (651) 414-6548 and we can assist you.



- Click **Manage Listings**
- Click Delete

Copying a Listing

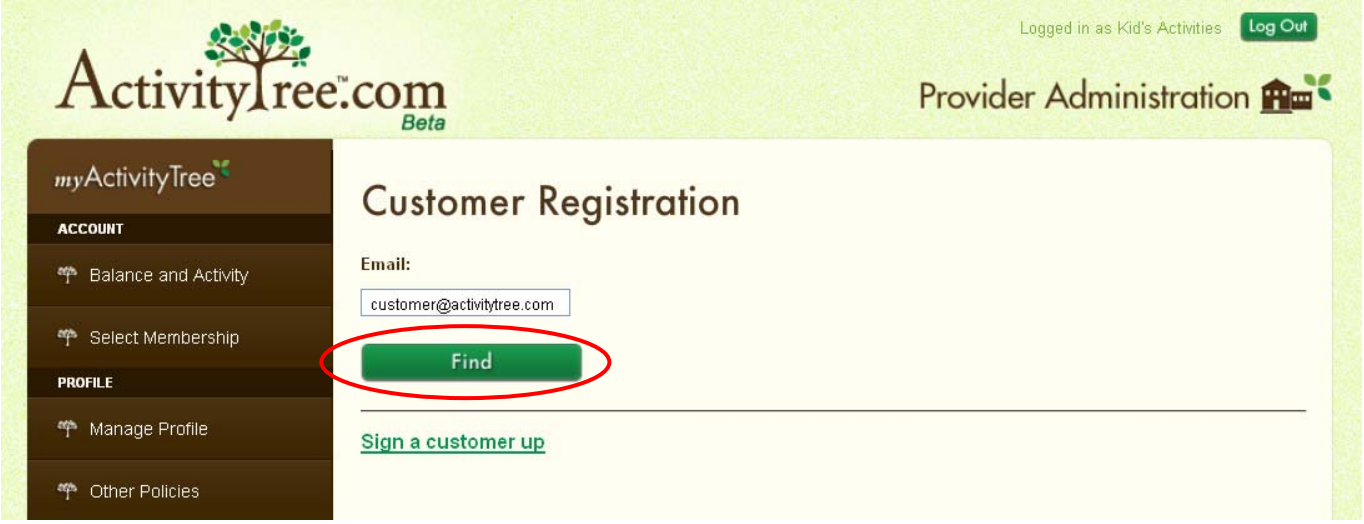
You can easily create new listings by copying existing listings that have similar information and making necessary changes.



- Click **Manage Listings**
- Click Copy; You will be taken to the **Add Listings** screen
- Change or add information to create a listing that is not a duplicate (e.g. you can add a Listing # or instructor if the listings are otherwise identical)
- Click Add Listing at the bottom of the screen

Registering a Customer

You have the ability to add activities to a customer shopping cart from your account. Click on **Register Customer**.



Selecting a Customer

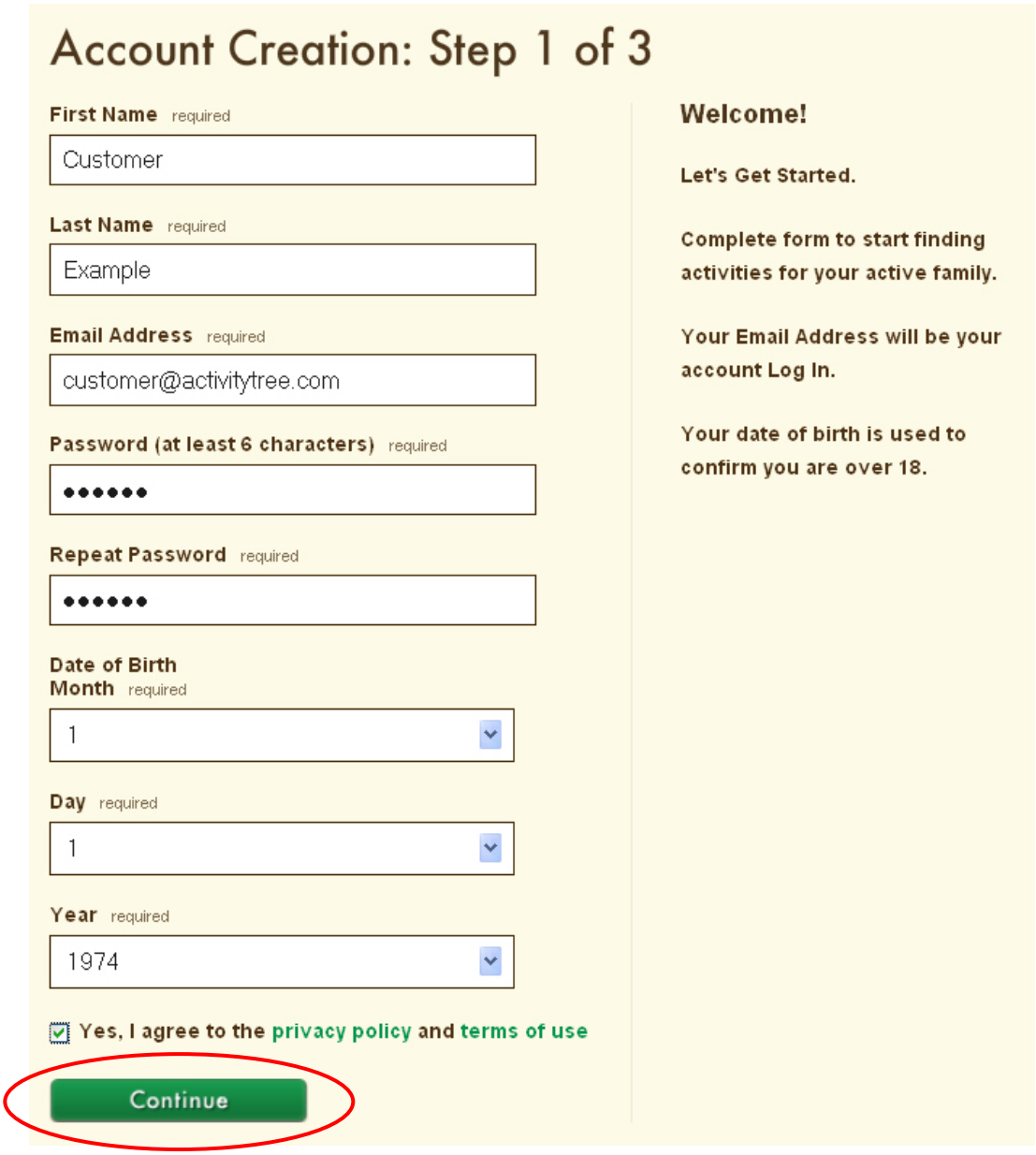
Existing ActivityTree Customer

- If the customer already has an ActivityTree account, or you are not sure, enter the email address of the customer in the Email box.
- Click Find

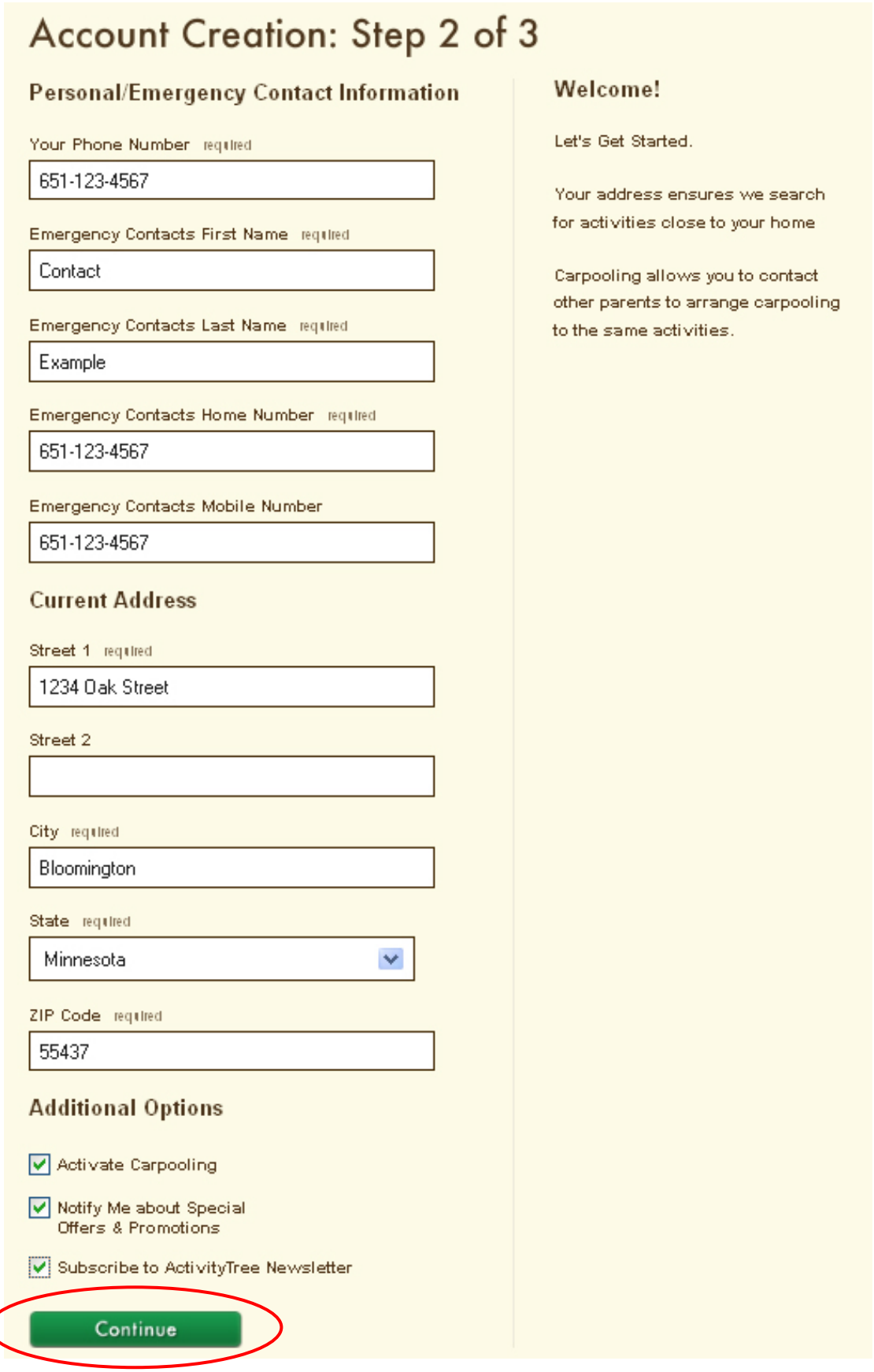
If the customer already has an account, you will be taken to a new screen. If the customer does not have an account, you will not see the new screen. You can create a new customer by following the instructions in the section below.

New ActivityTree Customer

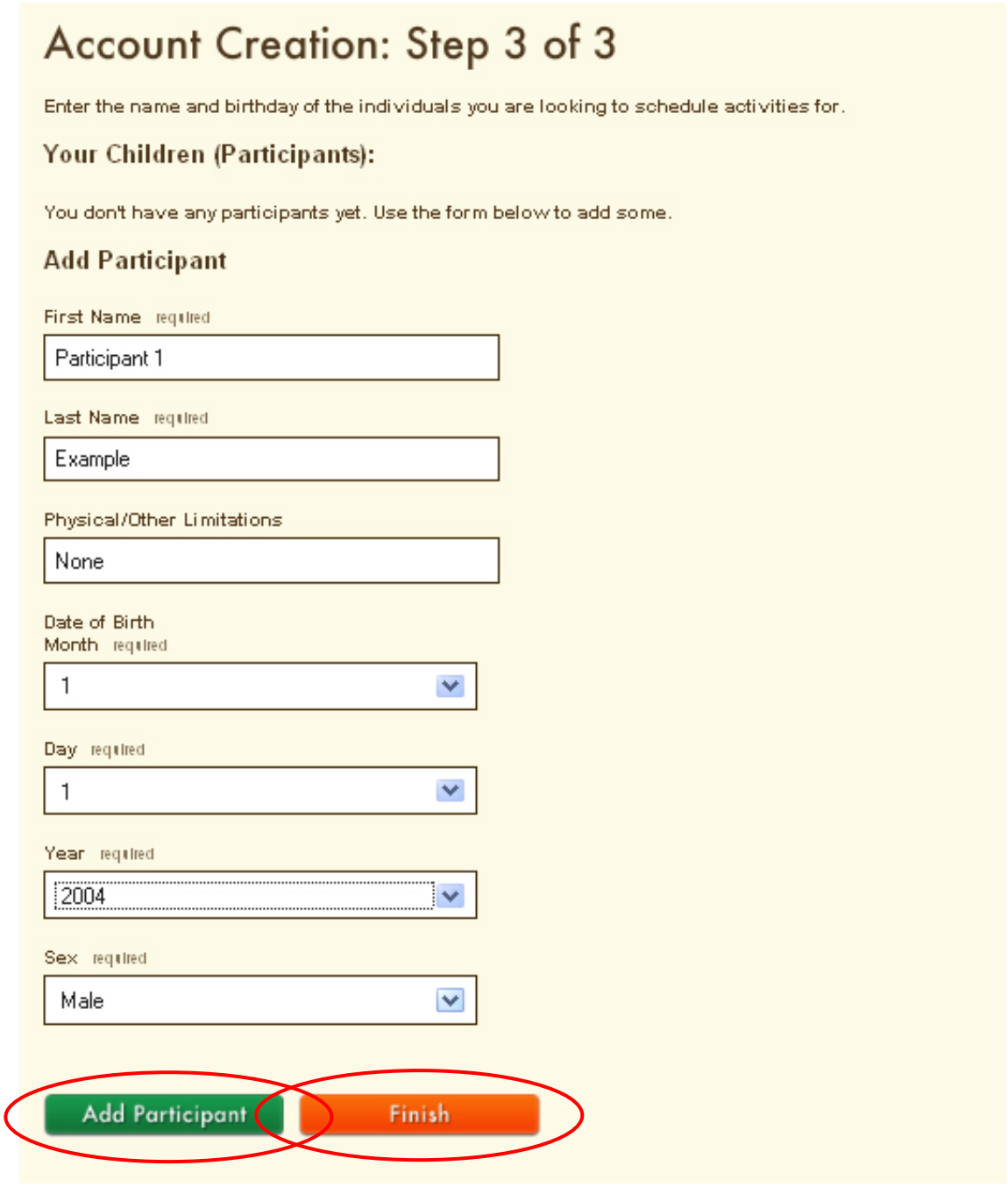
Click Sign a customer up. You will be taken to the Customer Sign Up screen. Enter the Customer's information and Click Continue.



Enter customer emergency contact information, address and preferences and Click Continue.



Enter the customer's participant information. Click Add Participant to add another participant. Click Finish when finished.

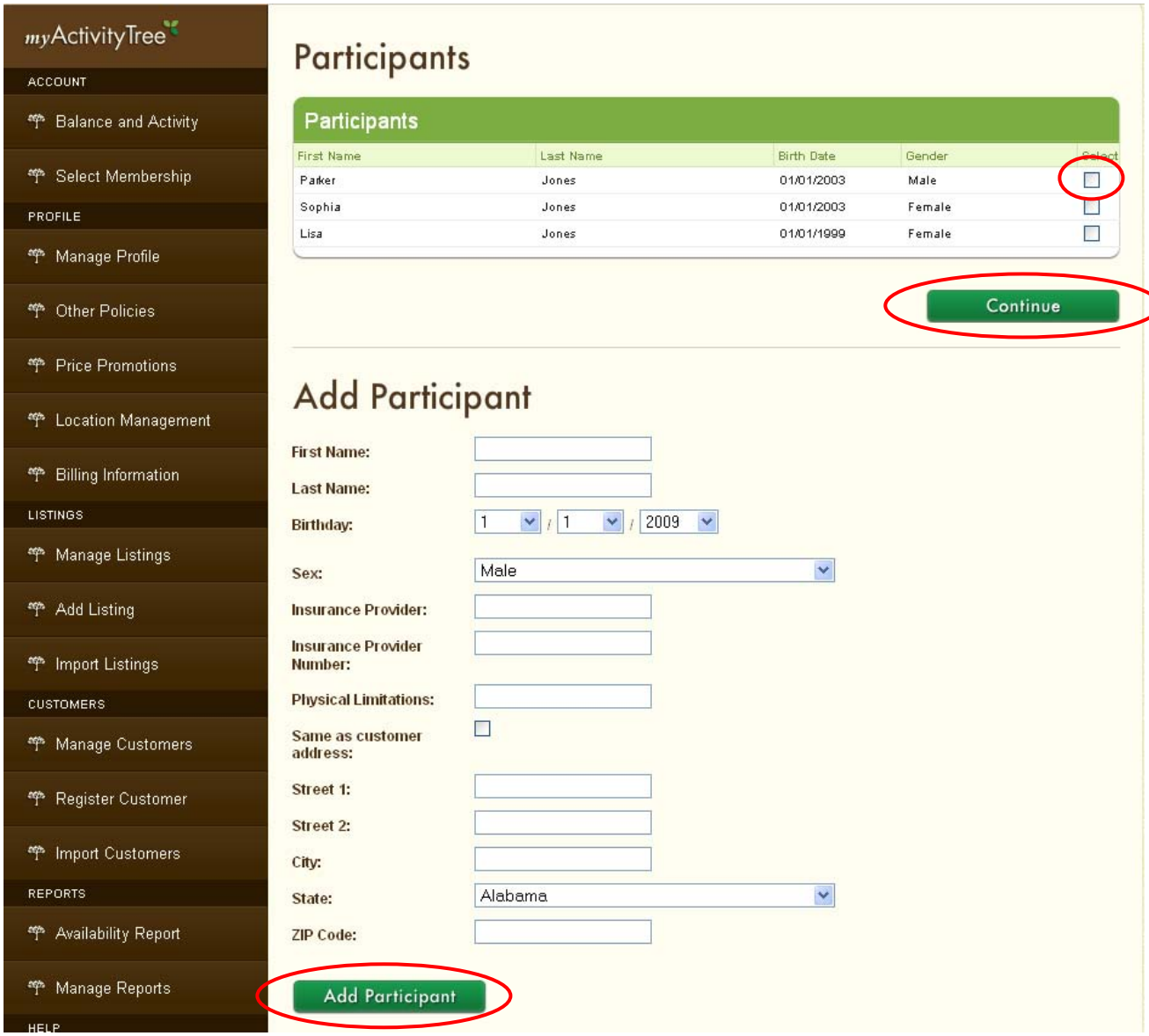


You will be taken to the screen below. If you are not taken back to this screen:

- Log in with your account information
- Click **Register Customer**
- Add the customer's email address
- Click Find

Selecting a Participant

Click the box to the right of the participant you would like to register. And Click Continue.

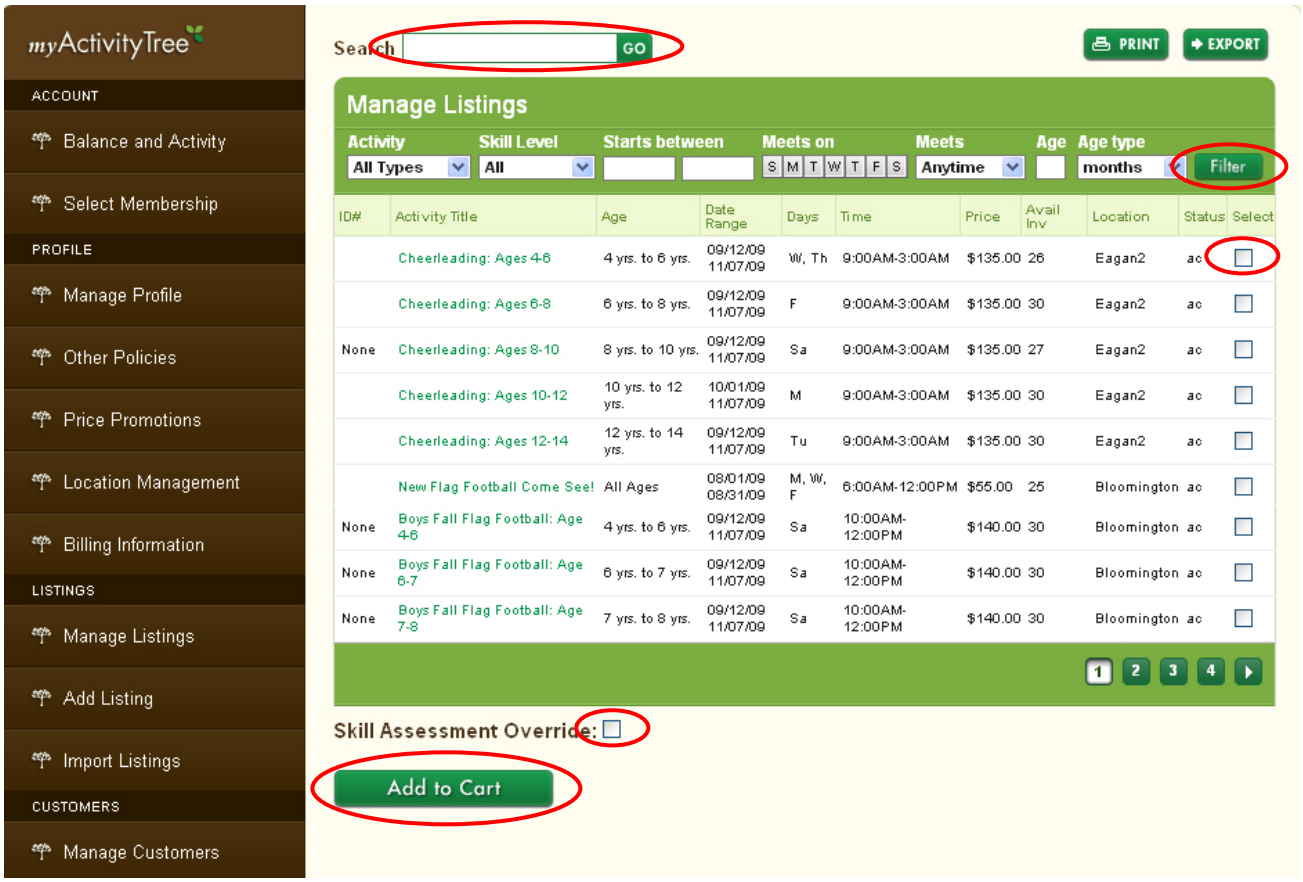


If the participant is not listed.

- Add the participant information in the boxes below “Add Participant”
- Click Add Participant.

You will be taken to a new screen that lists all your active listings.

Selecting a Listing



- Search or Filter to find the right listing (to filter, select filter criteria and then Click Filter)
- Click the box to the right of the listing you would like to select
- Click the Skill Assessment Override box if you want to override a skill assessment.
- Click Add to Cart.

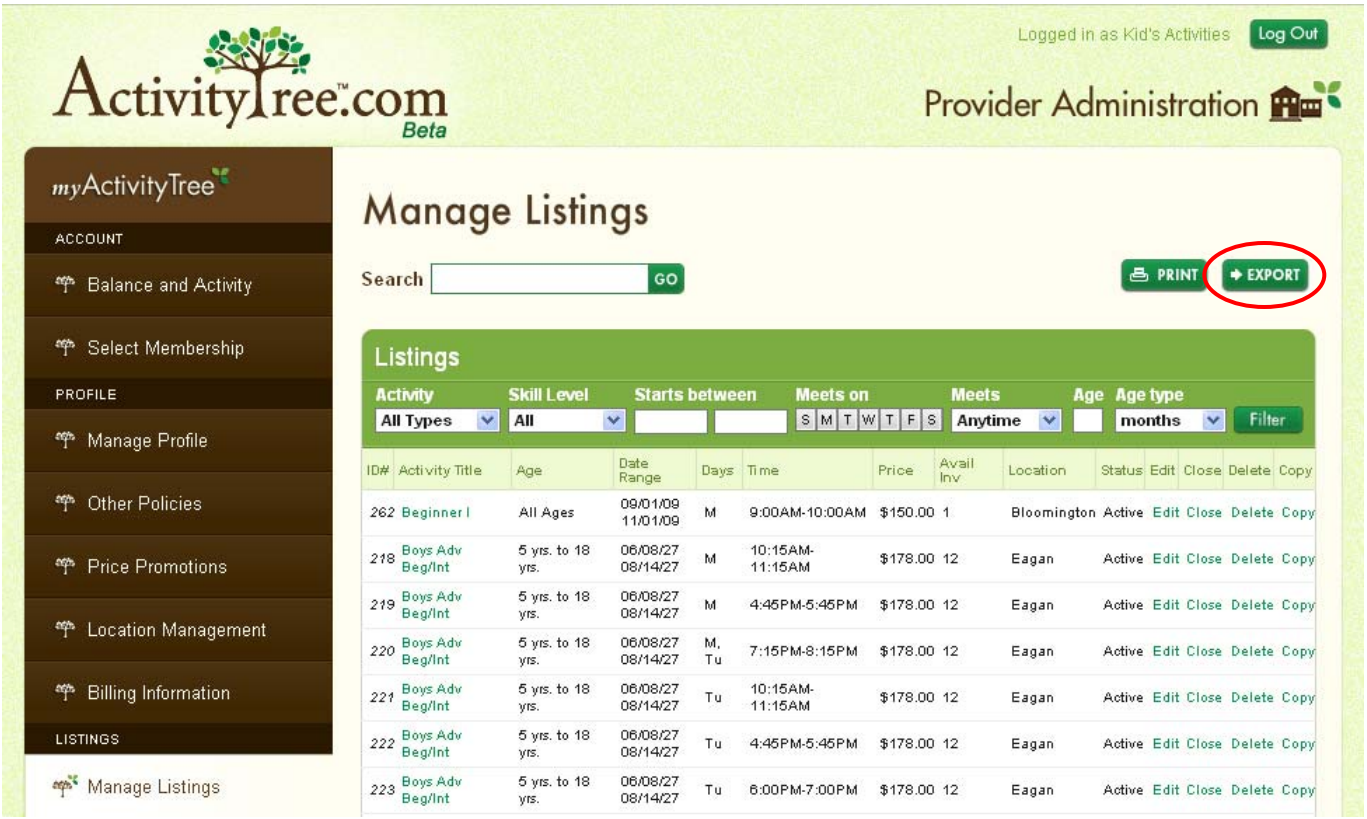
The Customer will receive an email notifying them that the Listing has been added to their cart. The Customer must confirm the purchase within 48 hours. When the Customer confirms the registration, you will receive a New Pending Registration email. When payment has been processed you will receive a Registration Confirmation email.

Importing Listings

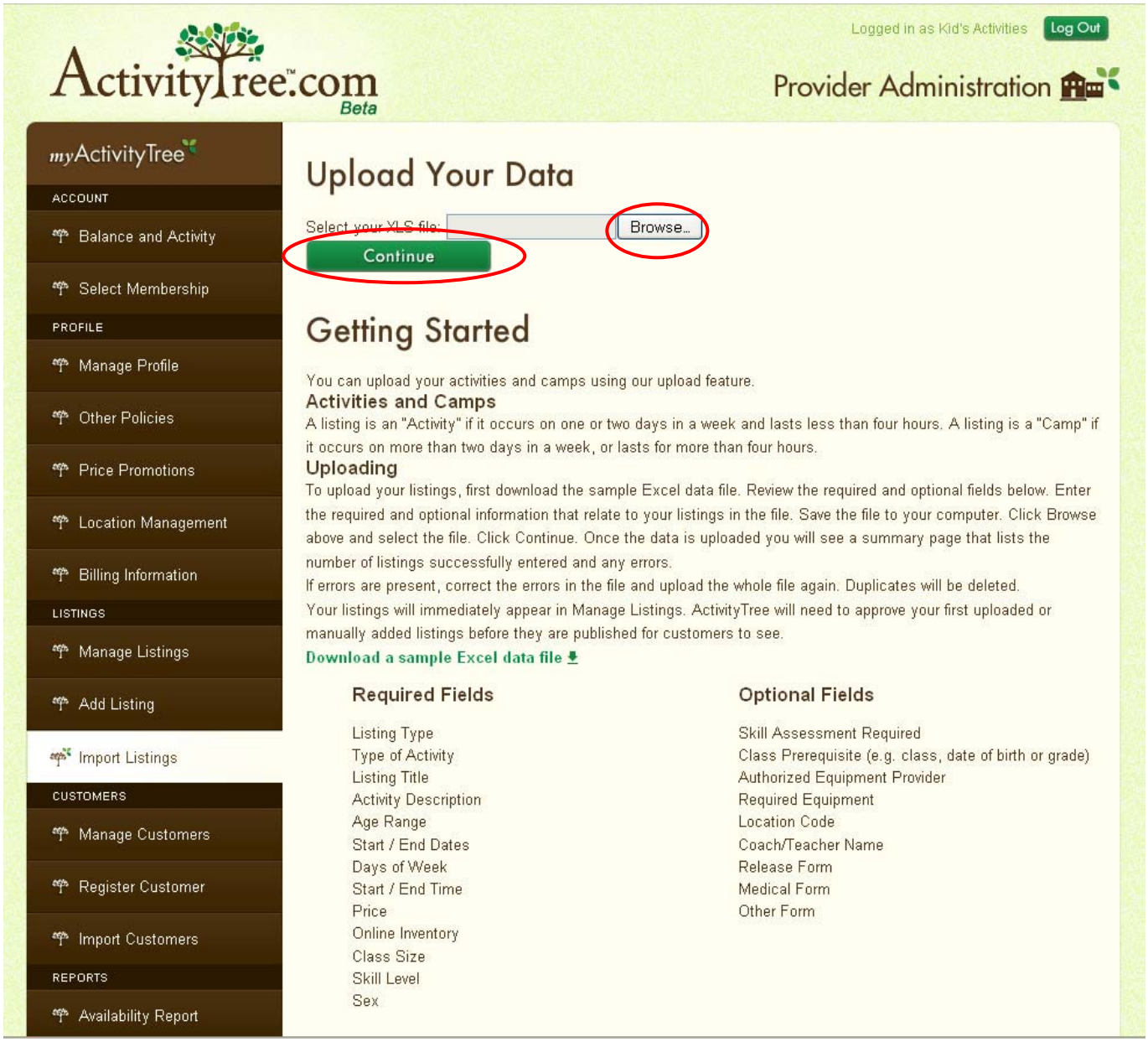
If your activity schedules do not differ significantly from session to session or you have recurring monthly listings, you can easily update your listings using the **Import Listings** function.

Importing a New Session

Start by Clicking Manage Listings.



- Click Export (will export file to Excel)
- Sort as necessary to organize listings by date and/or location
- Make necessary changes to your listings (e.g. days, times, new listings, etc.)
- Save file as an excel document.

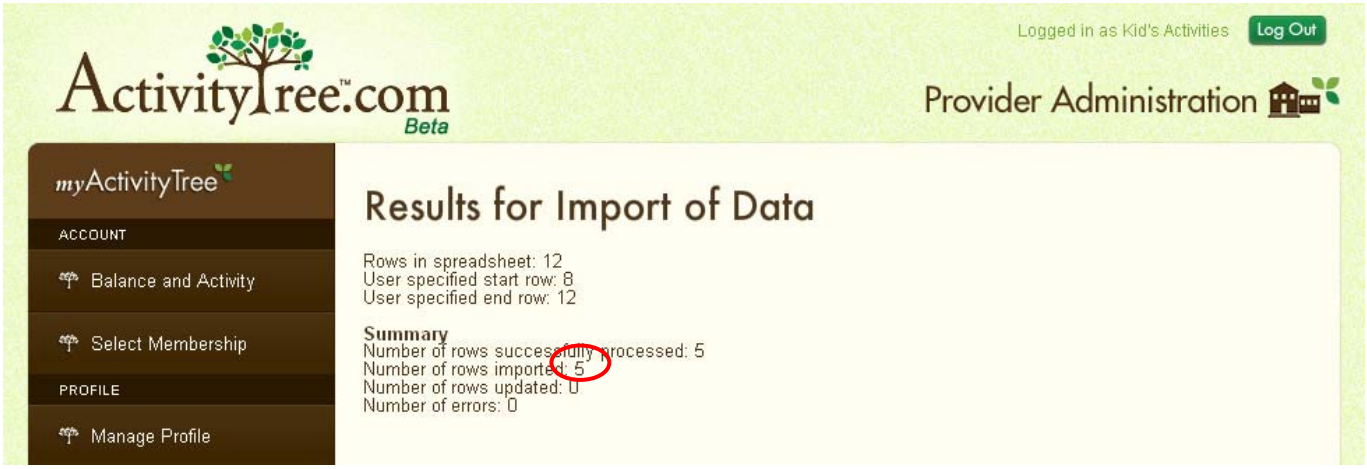


- Click **Import Listings**
- Click Browse and select the excel file
- Click Continue

You will be taken to a page that maps the fields from the excel file to ActivityTree's database. If **all** the boxes on the right say SELECT COLUMN, check your spreadsheet to confirm that your listings start on row 8. Make corrections and start the import process from the beginning.

If most of the boxes on the right have information in them (they should not all say SELECT COLUMN), Click Submit at the bottom of the page.

You will be taken to a page that summarizes the import and displays any errors.



- Confirm the number of rows successfully imported equals the number of listings you wanted to import
- If not, correct any errors and reimport the file.

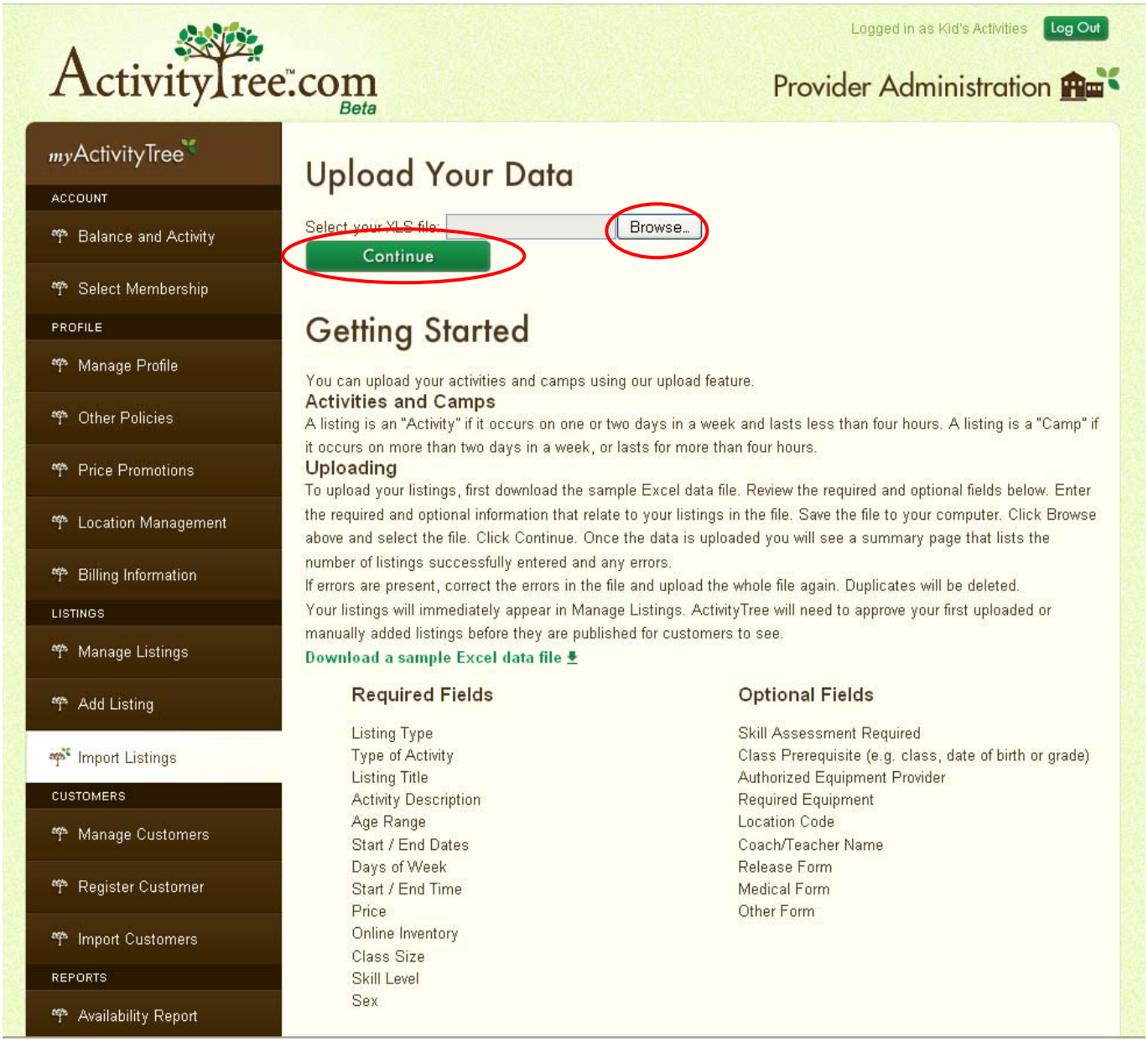
Duplicates will be eliminated when you reimport. You do not need to delete listings that have already been successfully imported.

Updating Recurring Listings

If you have recurring monthly or periodic listings (e.g. music lessons, trials, etc.) you need to update your listings periodically to ensure customers will be able to register for your listings on ActivityTree.com.

Upon creation of your account or your initial training, you should have received a spreadsheet from ActivityTree that enables you to update your listings by changing a single date field and then importing the revised spreadsheet. If you did not receive this spreadsheet, please contact ActivityTree at (651) 414-6548 or help@activitytree.com.

If you have the spreadsheet, change the “First Day of Period” field to be the first day of the new registration period you would like to create listings for (**Note:** Do not delete the start and end time that are already in the cells, they contain formulas used for the update). This will automatically update the dates of all the listings. You can edit the information in the spreadsheet to reflect any changes in listing times, days, etc.



- Click **Import Listings**
- Click Browse and select the excel file
- Click Continue

You will be taken to a page that maps the fields from the excel file to ActivityTree's database. If **all** the boxes on the right say SELECT COLUMN, check your spreadsheet to confirm that your listings start on row 8. Make corrections and start the import process from the beginning.

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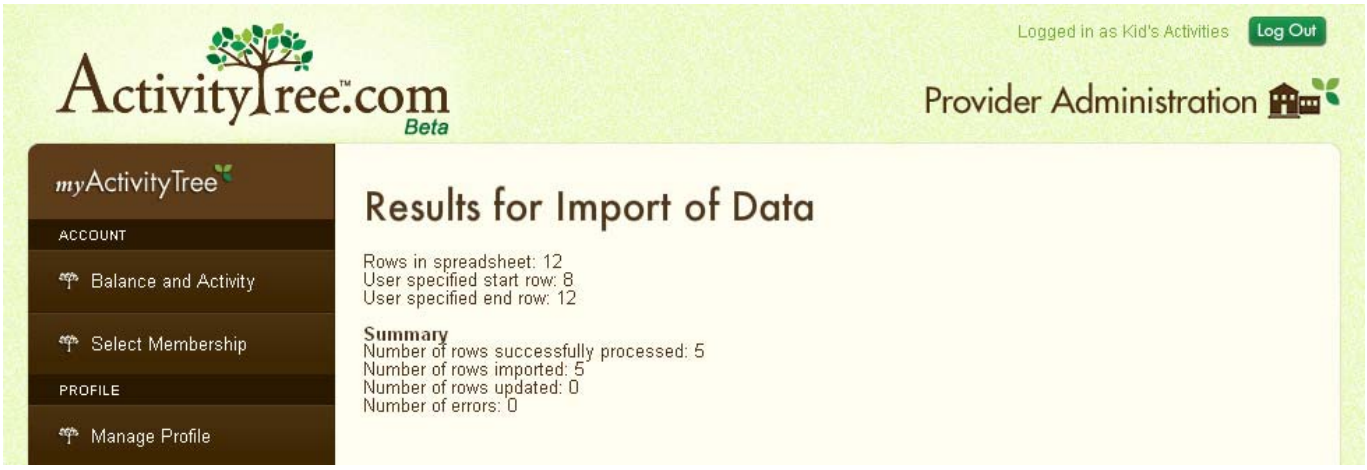
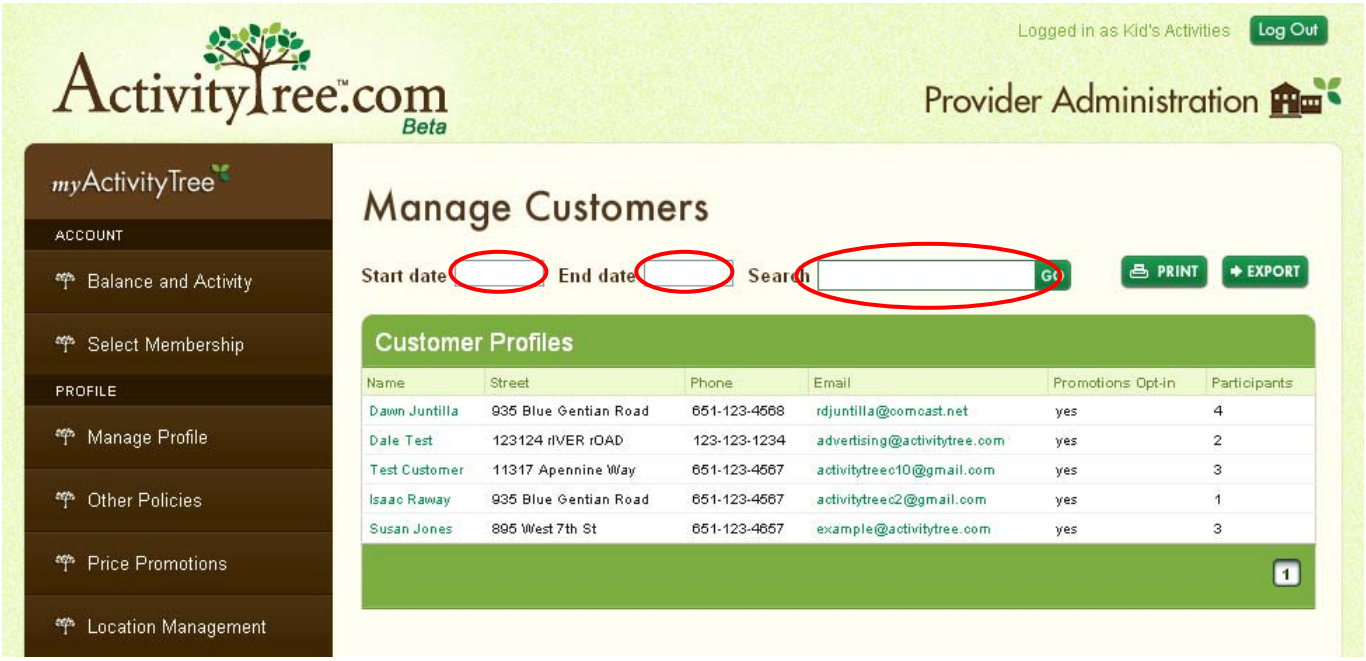


- Confirm the number of rows successfully imported equals the number of listings you wanted to import
- If not, correct any errors and reimport the file.

Duplicates will be eliminated when you reimport. You do not need to delete listings that have already been successfully imported.

Accessing Customer Information

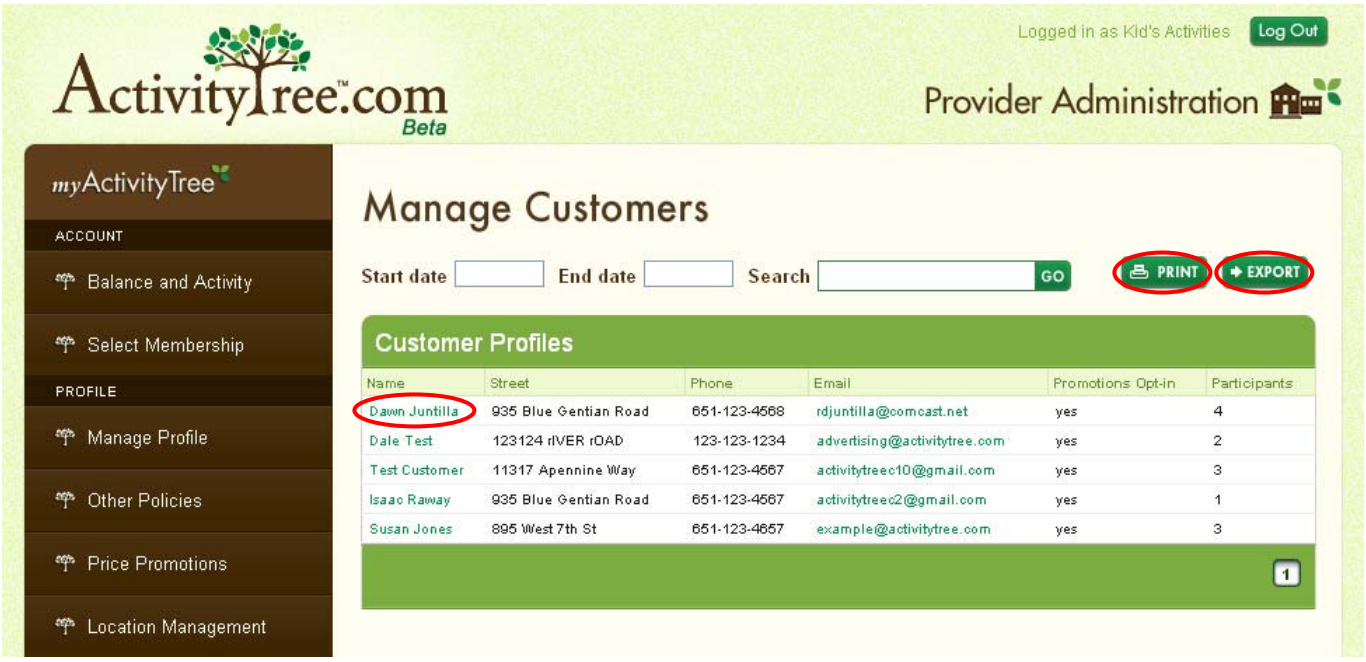
All of your customer information can be viewed, printed and exported through **Manage Customers** and the Customer Detail Page. **Manage Customers** provides access to contact information, participant information, registration history and more.



Finding Customers

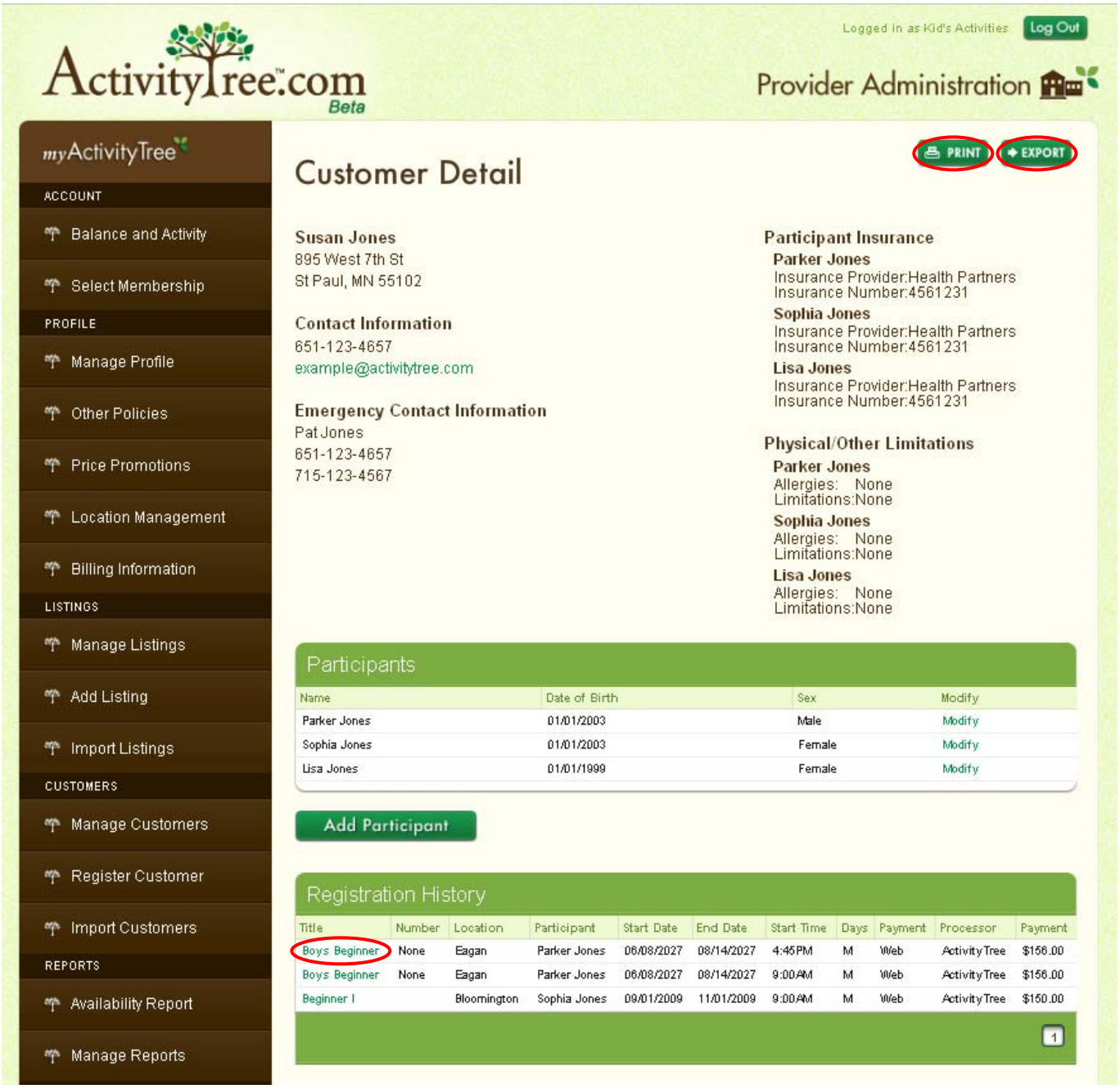
- Click **Manage Customers**
- Enter Start and End Date to search for customers with registrations within a certain time frame
- Enter the customers first name, last name or email address in the Search Box and Click Go to find a specific customer
- Click the customer's name to access full customer information and registration history

Printing and Exporting Customer Information



- Click **Manage Customers**
- Click Print to print the Manage Customers Summary
- Click Export to export complete customer contact information (address, email, phone, DOB, etc.) to an excel file (Preferred Members only)
- Click the Email address to send an email to your customer (**Note:** you may not send promotional information to any customer with a “No” in the Promotions Opt-in column).
- Click the Customers name to access full customer information and registration history

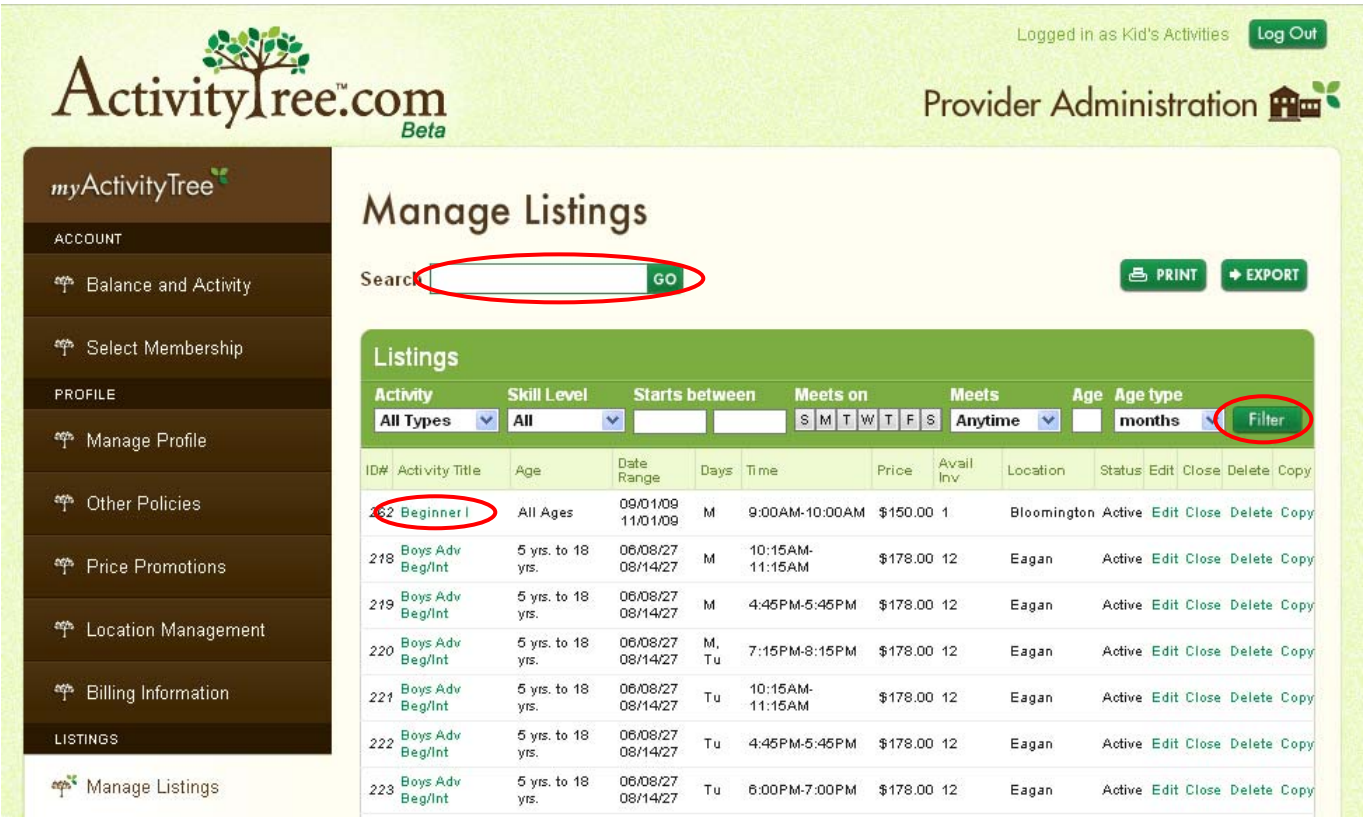
You will be taken to the Customer Detail page.



- Click Print to print complete customer, participant and registration information
- Click Export to export complete customer and participant information to an excel file
- Click the Title of the activity in Registration History to link to the complete roster for the activity

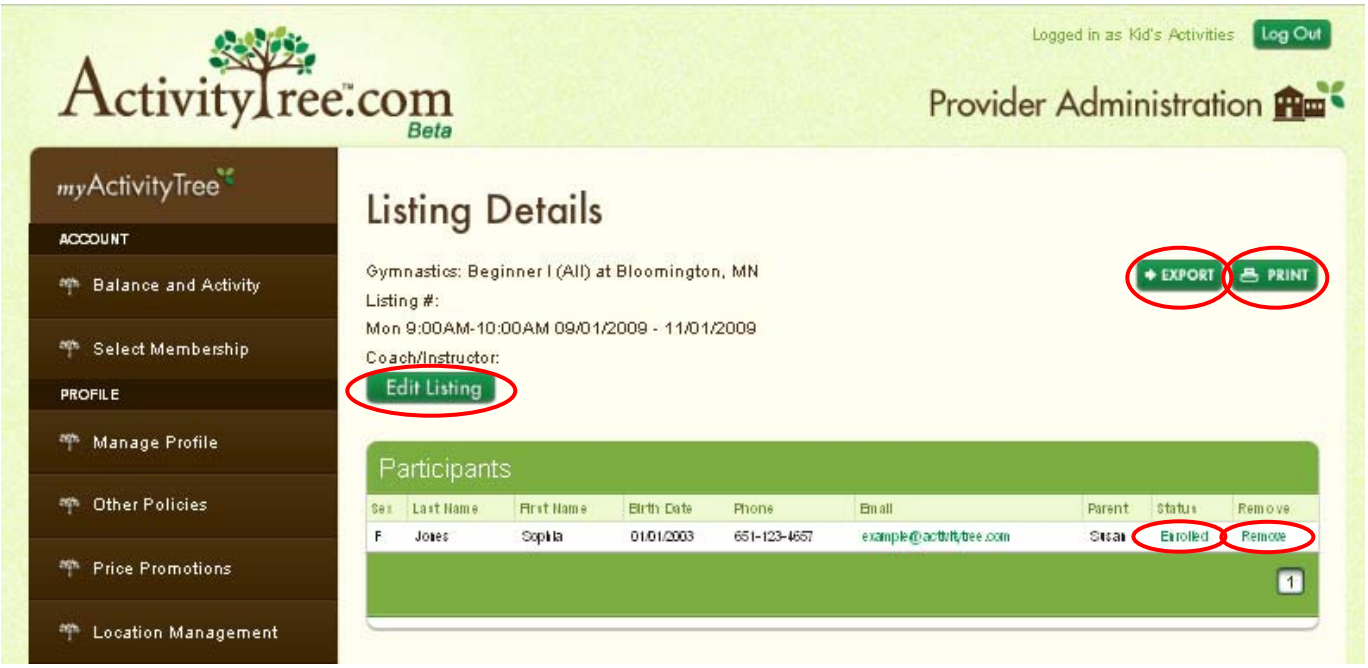
Accessing Roster Information

You can access your complete Roster from **Manage Listings**.



- Click **Manage Listings**
- Search or Filter to find the right listing (to filter, select filter criteria and then Click Filter)
- Click on the Activity

You will be taken to the **Listing Details** page.

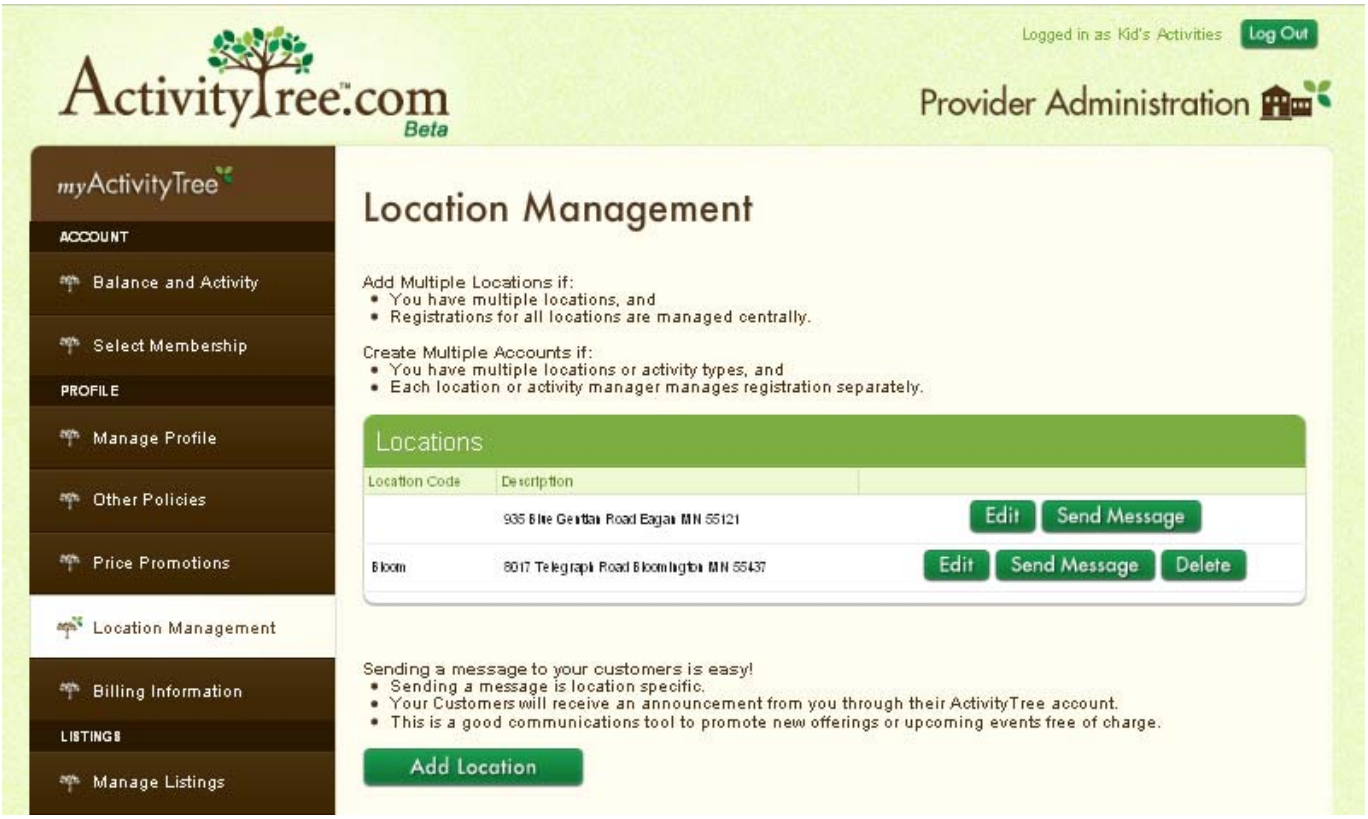


- Click Print to print a roster
- Click Export to export a roster to an excel file
- Click Edit Listing to edit the listing
- Click Enrolled to link to the customer detail page
- Click Remove to cancel the registration (Email will be sent to the customer. **ActivityTree does not process refunds for cancellation of confirmed registrations**)

Sending a Message to Your Customers

You can post a message to all current customers' ActivityTree accounts from **Location Management**. You can send an email message to an individual customer from the Customer Detail page or the Listing Detail page. If you are a Preferred Provider you can post an announcement to the ActivityTree account of all the customers on a listing roster from Listing Details.

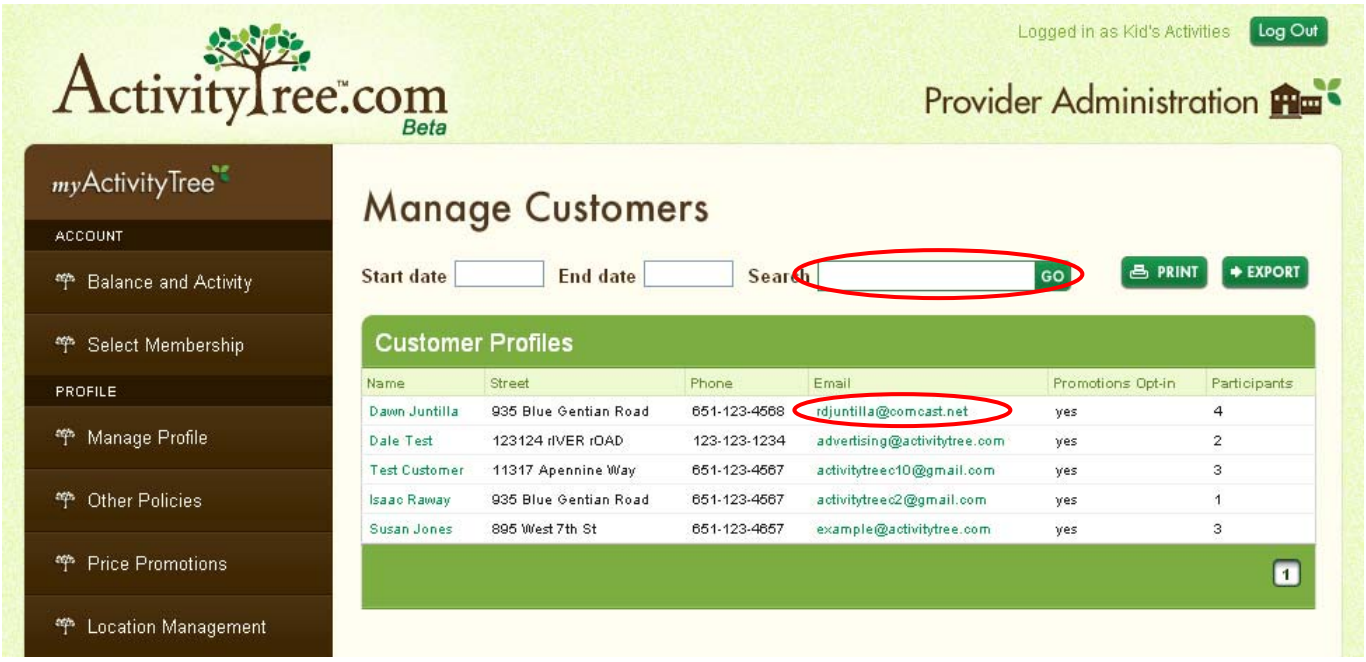
Posting an Announcement to Customers at a Location



- Click **Location Management**
- Click Send Message to the right of the correct location. You will see a pop-up box.
- Enter a Title and Message
- Click Save

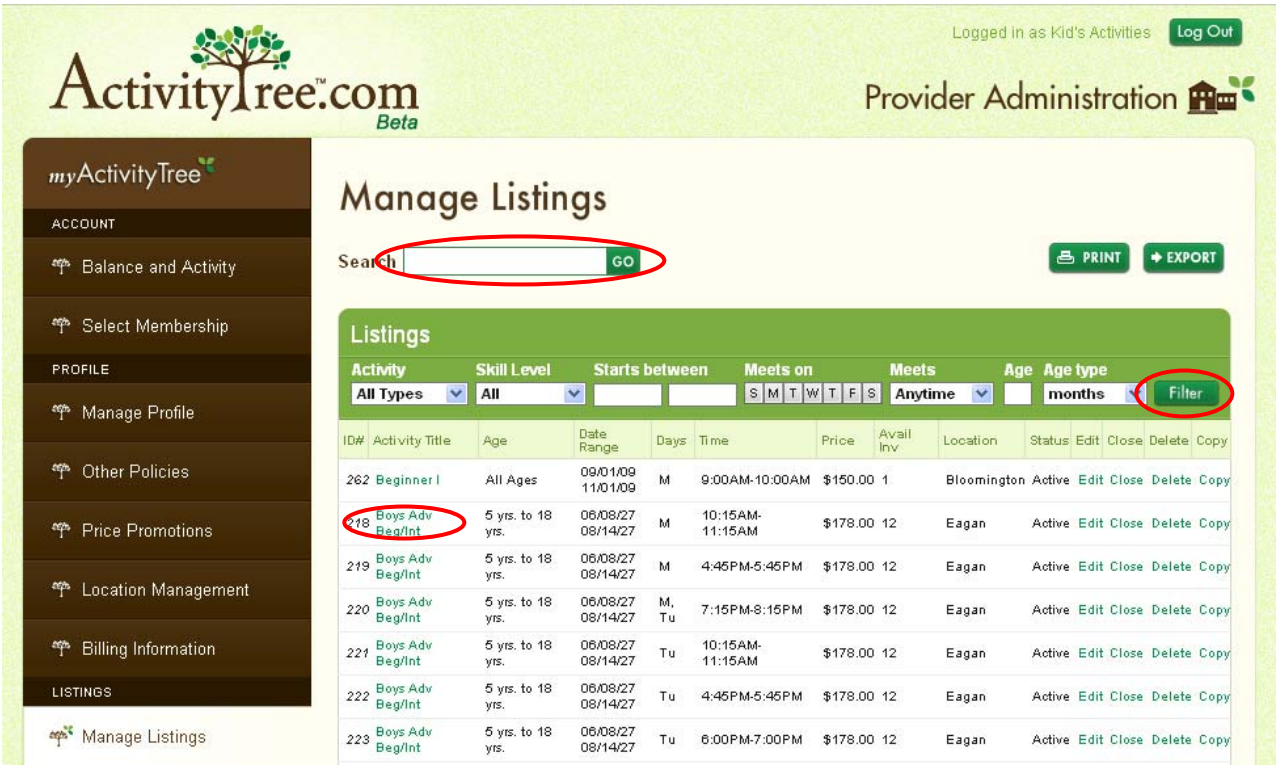
Sending an Email to a Customer

You can send an email directly to a customer from the Customer Detail page.



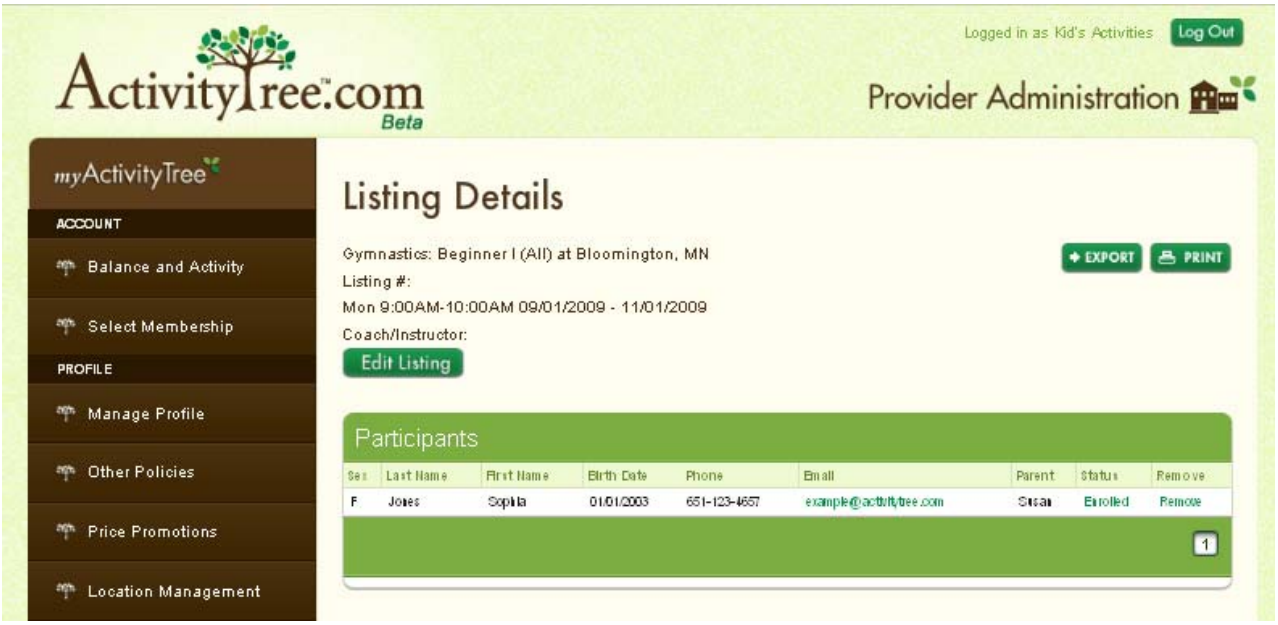
- Click **Manage Customers**
- Enter the customers first name, last name or email address in the Search Box and Click Go to find a specific customer
- Click the customer's email address (**Note**: You are not authorized to send promotions to any customer that has a "No" in the Promotions Opt-in column)

You can also send an email directly to a customer from the Listing Details page.



- Click **Manage Listings**
- Search or Filter to find the right listing (to filter, select filter criteria and then Click Filter)
- Click on the Activity

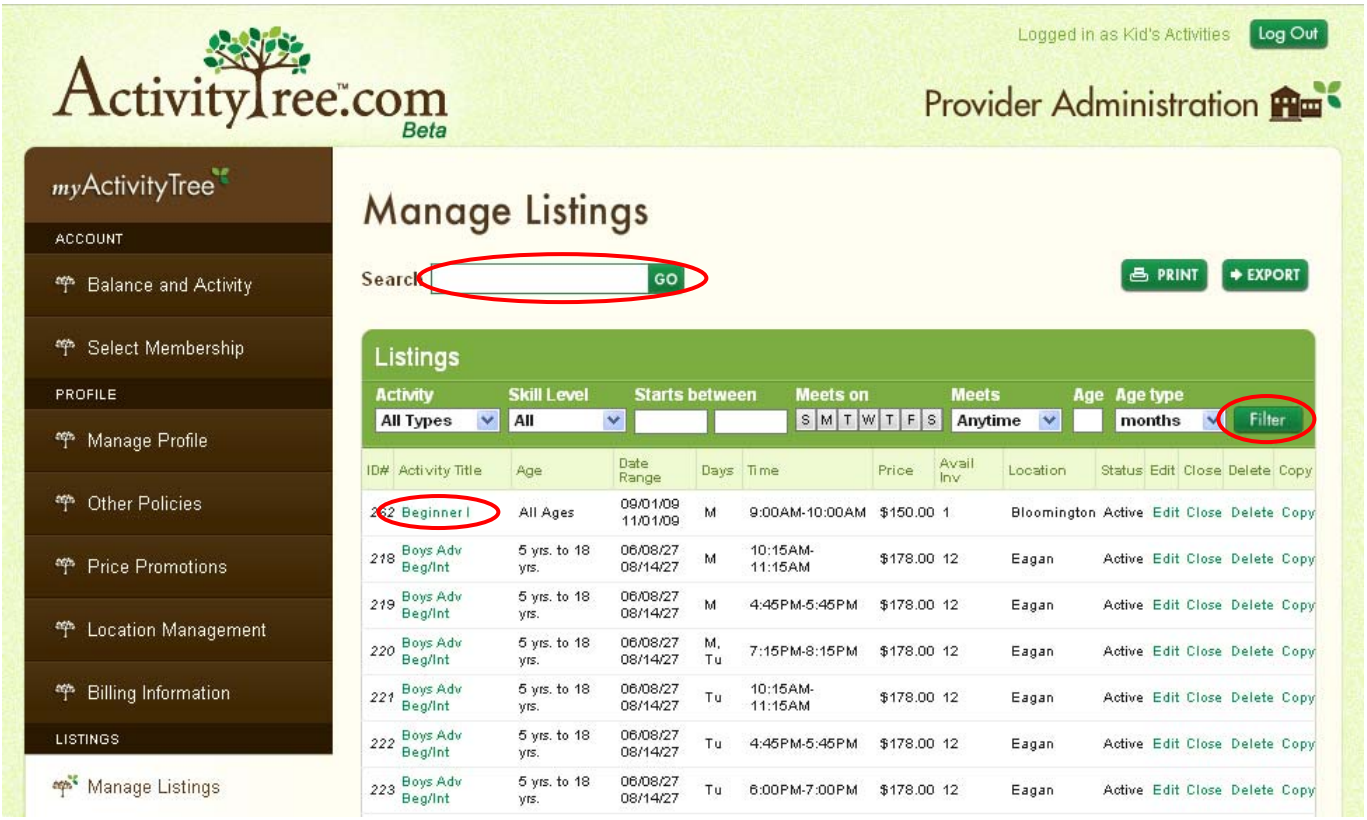
You will be taken to the Listing Details page.



Click the customer's email address to send an email (**Note**: You are not authorized to send promotions to any customer that has a "No" in the Promotions Opt-in column on the Manage Customer's screen)

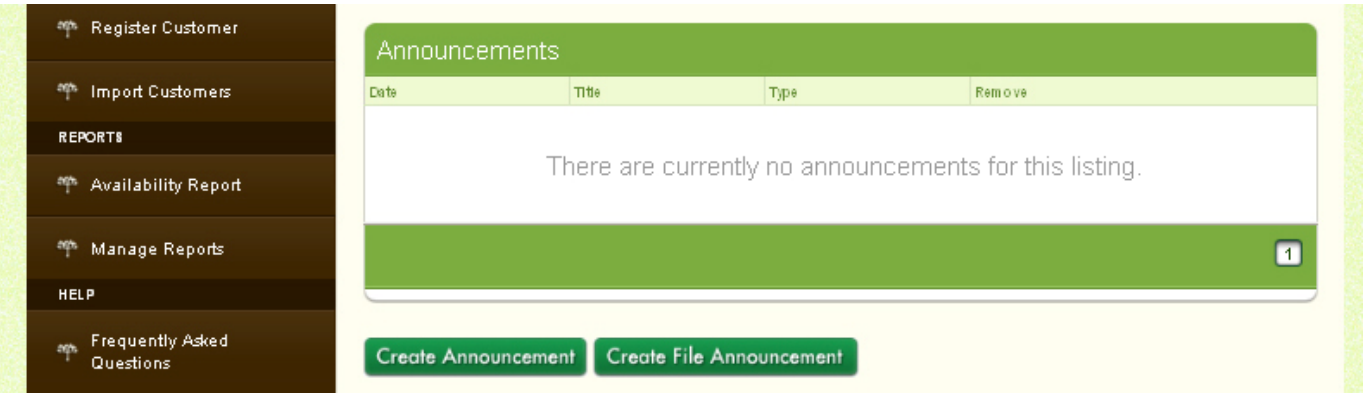
Posting an Announcement to all Customer on a Roster (Preferred Providers)

Preferred providers can post a text or file announcement to all customers on a roster from the Listing Details page.



- Click Manage Listings
- Search or Filter to find the right listing (to filter, select filter criteria and then Click Filter)
- Click on the Activity

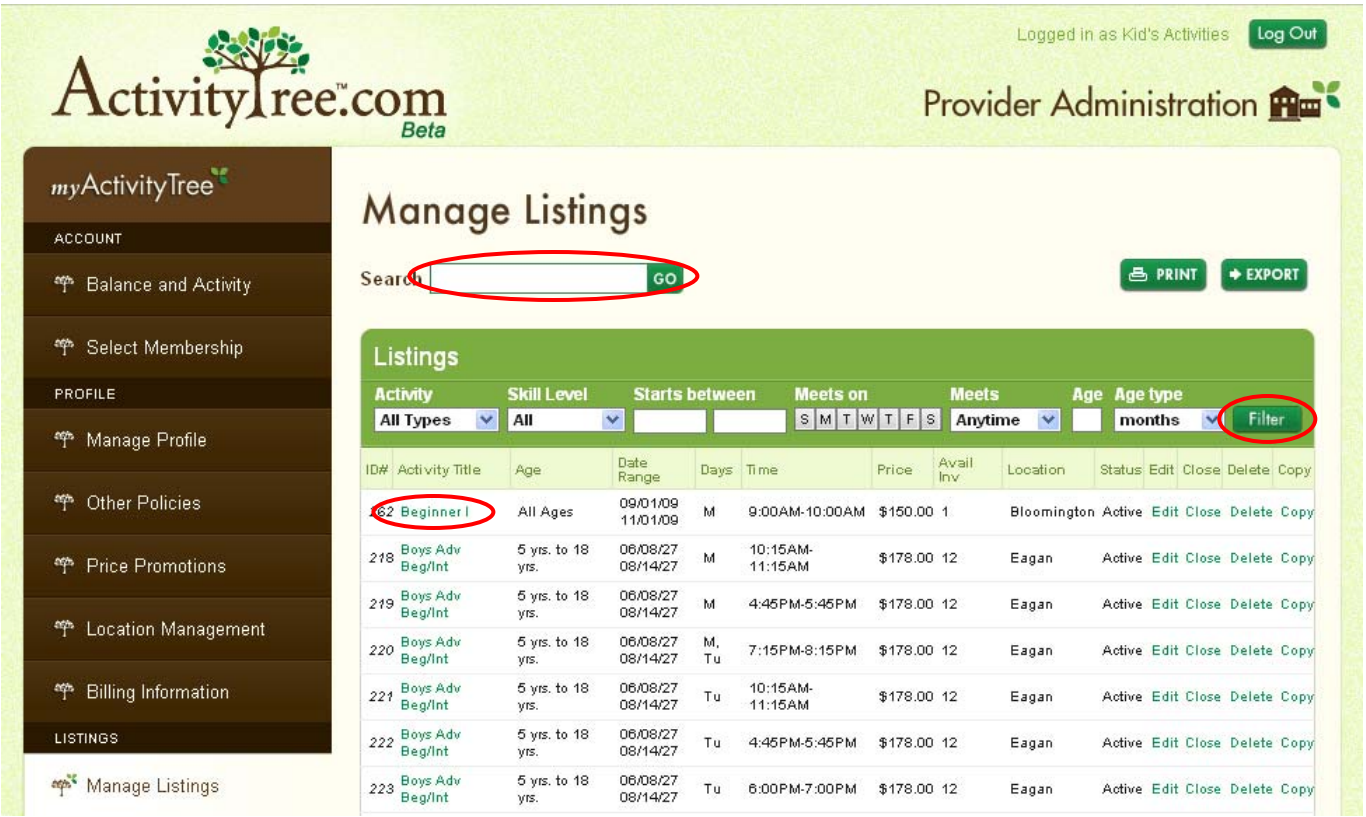
You will be taken to the **Listing Details** page.



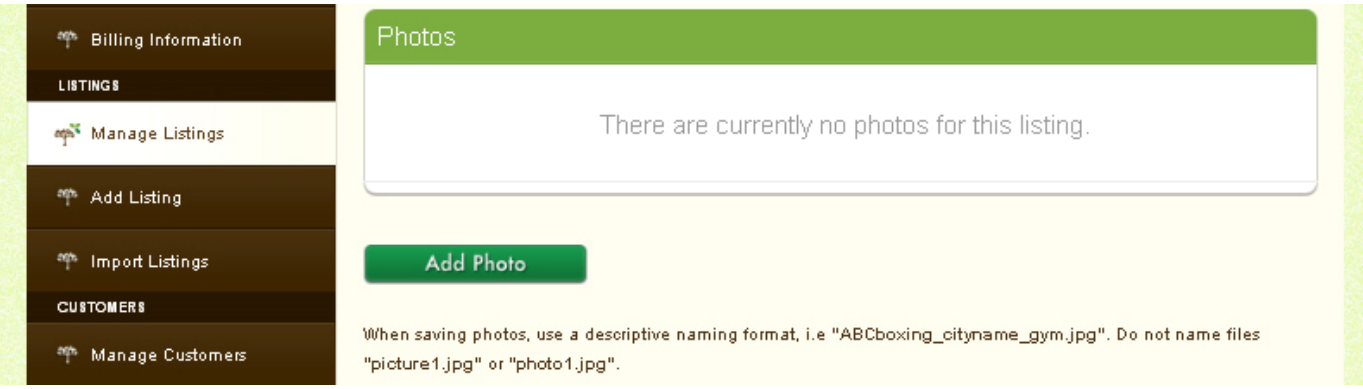
- Click Create Announcement to create a text only announcement. You will see a pop-up.
- Enter a title and message
- Click Save

- Click Create File Announcement to create an announcement with a file attachment. You will see a pop-up.
- Click Browse, and select a file
- Enter a Title
- Click Upload File

Adding Photos for a Listing



You will be taken to the **Listing Details** page.



- Click Add Photo
- Click Browse and select a .jpg file
- Click Upload

Changing Membership

Contact ActivityTree at 651-414-6548 or sales@activitytree.com to modify your membership.