ActivityTree Provider Quick Start Manual

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

ActivityTree™.com

Revision C 7/17/09

Welcome to ActivityTree!

ActivityTree provides one online destination for customers to find you, register for your activities and organize their activity schedule.

Getting Started

Create Your Profile

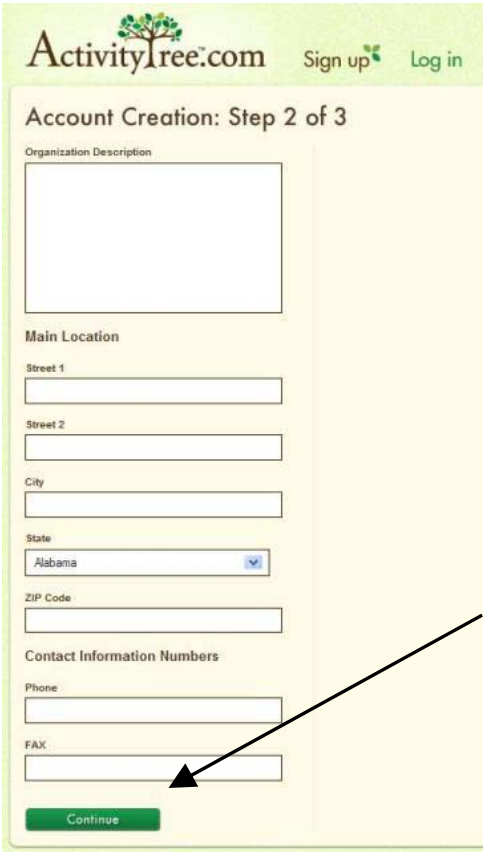
Go to www.ActivityTree.com and click on **Sign Up** at the top of the page. Click on **"I provide activities"**.

Step 1: Complete the following

- Organization name
- Contact Name
- E-mail address
  - *Used as sign in ID*
  - *All communication from ActivityTree.com will be sent to this address*
- Password
- Review Privacy Policy and Terms of Use
- Check box to agree to Privacy Policy and Terms of Use

Click continue when finished

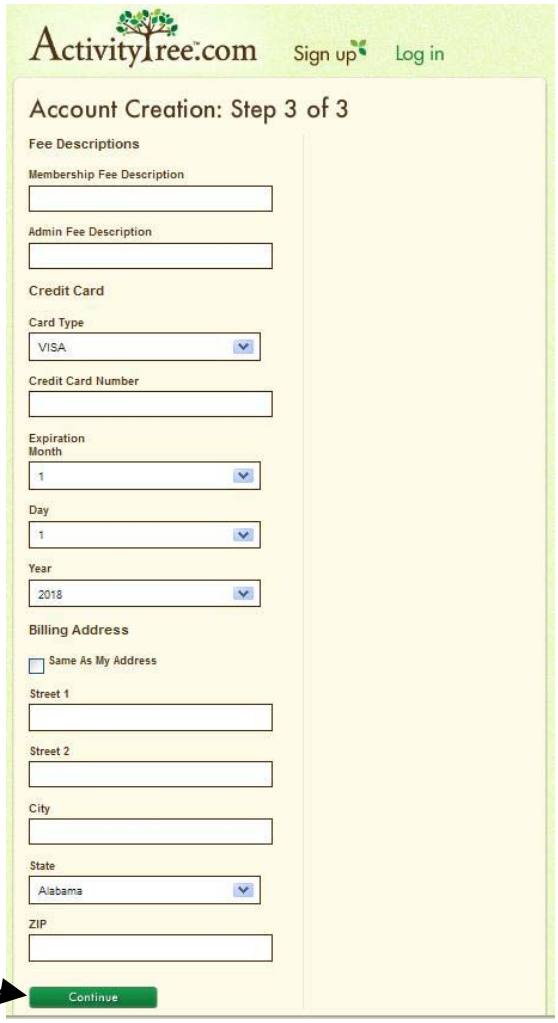
Sign-up continued



Step 2: Complete the following

- Organization description (this will appear on all of your listings)
- Complete address
- Phone number
- Fax number

Click continue when finished



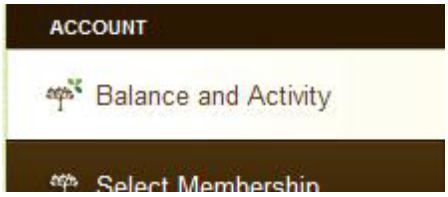
Step 3: Complete the following

- Membership fee description*
  - *example: optional $35.00 annual fee – 15% off all activities*
  - *Enter NONE if not applicable*
- Admin fee description*
  - *example: $35.00 annual fee per family*
  - *Enter NONE if not applicable*
- Credit card number and expiration
- Billing address – check box provided if same as company address

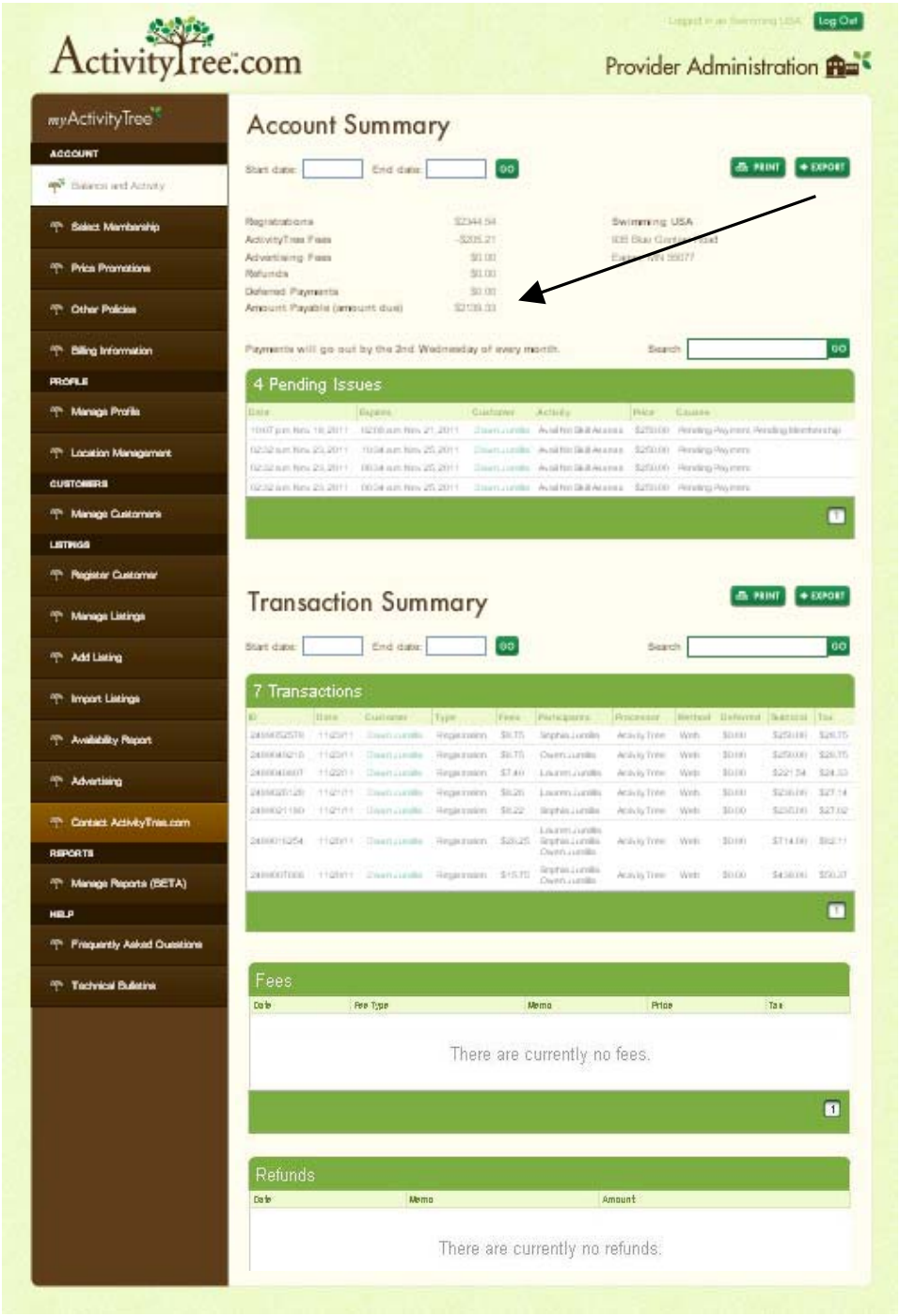
**these fees will not be charged to your customer by ActivityTree*

Click continue when finished

Balance and Activity



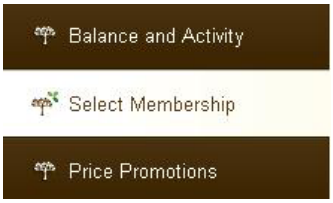
After completing sign up you will be taken to the Balance and Activity Account Summary page. This is your "dashboard" that summarizes all ActivityTree activity including pending issues, transactions and fees.



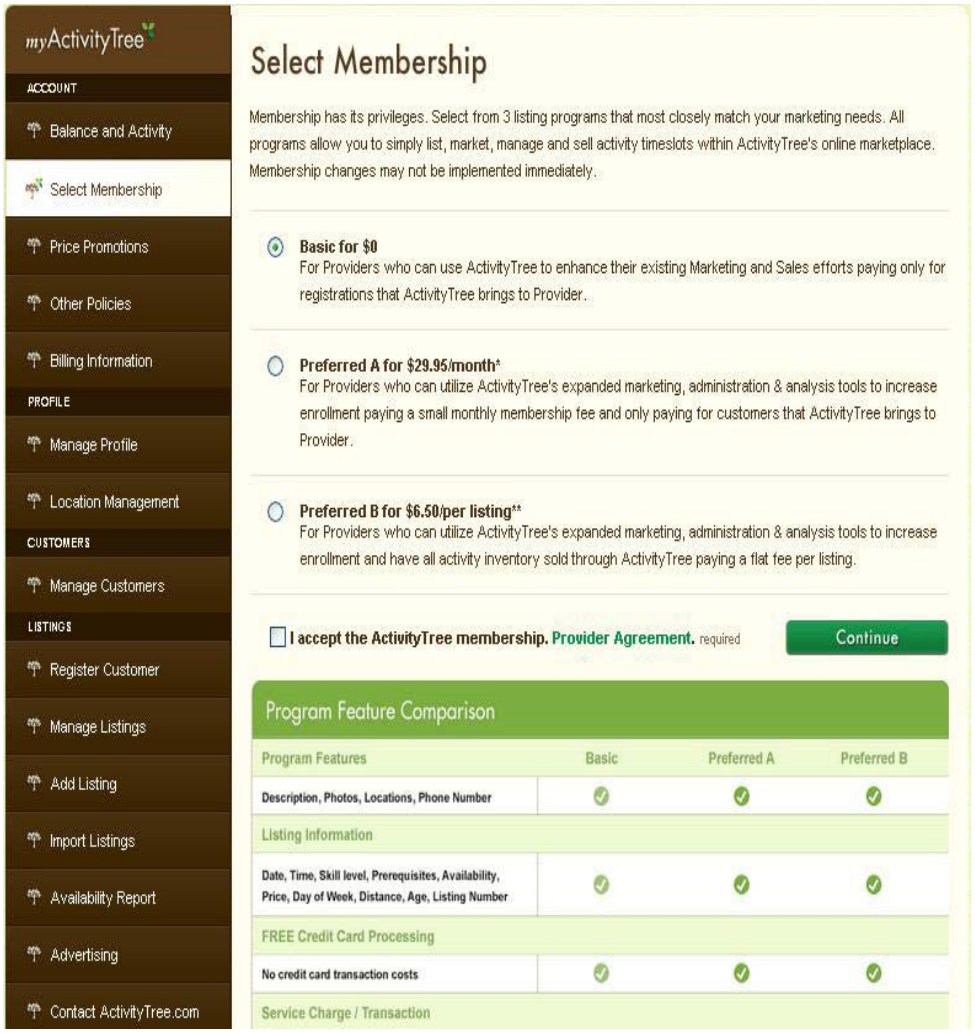
Balance and Activity Summary

- Amount payable or due on the 2nd Wednesday of each month
- Pending Issues that need your attention
- Summary of transactions
- Summary of Fees
- Summary of Refunds

Select Your Membership



Click **Select Membership** from the left navigation bar. You must select a membership before you enter or upload listings.



- Review the package options
- Select the membership that fits your business needs
- Review the Provider Agreement
- Click the box to agree with the provider agreement
- Click continue

If you have decided to change your membership the change may not be implemented immediately. For example, if you are currently A Preferred a member and you have decided to change to a Preferred B membership, the change will occur one month from your last monthly payment. See Provider Agreement for more details regarding the timing and terms related to a change in membership. If you want to discontinue your membership, please contact ActivityTree Customer Service at (651) 414-6548.

Create Your Promotions

ActivityTree provides you with the flexibility to create the promotions necessary to drive registrations. You may create or edit your promotions at anytime. Click **Price Promotions** from the navigation bar to view the options provided, simply click the down arrow on the right of the drop down box. You may type in the exact amount of a % or $ discount.

Multi-Registrant Discount

- Creates a discount for families with multiple registrants in a single order
- Promotion displays in listing detail
- Applied to cart at checkout

Multi-Listing Discount

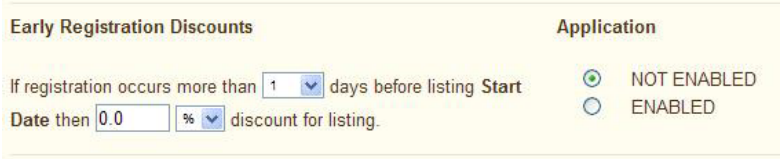
- Creates a discount for registrants with multiple listing sign ups in a single order
- Promotion displays in listing detail
- Applied to cart at checkout

Late Opening Discount

- Discount reflected in the listing price
- Description under the listing price

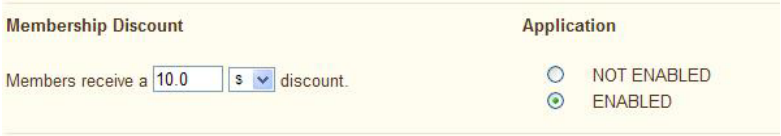
Create Your Promotions – Continued

Early Registration Discount



- Discount reflected in the listing price
- Description under the listing price

Membership Discount



- If membership box checked in the shopping cart, price in cart will reflect potential discount
- Requires provider approval

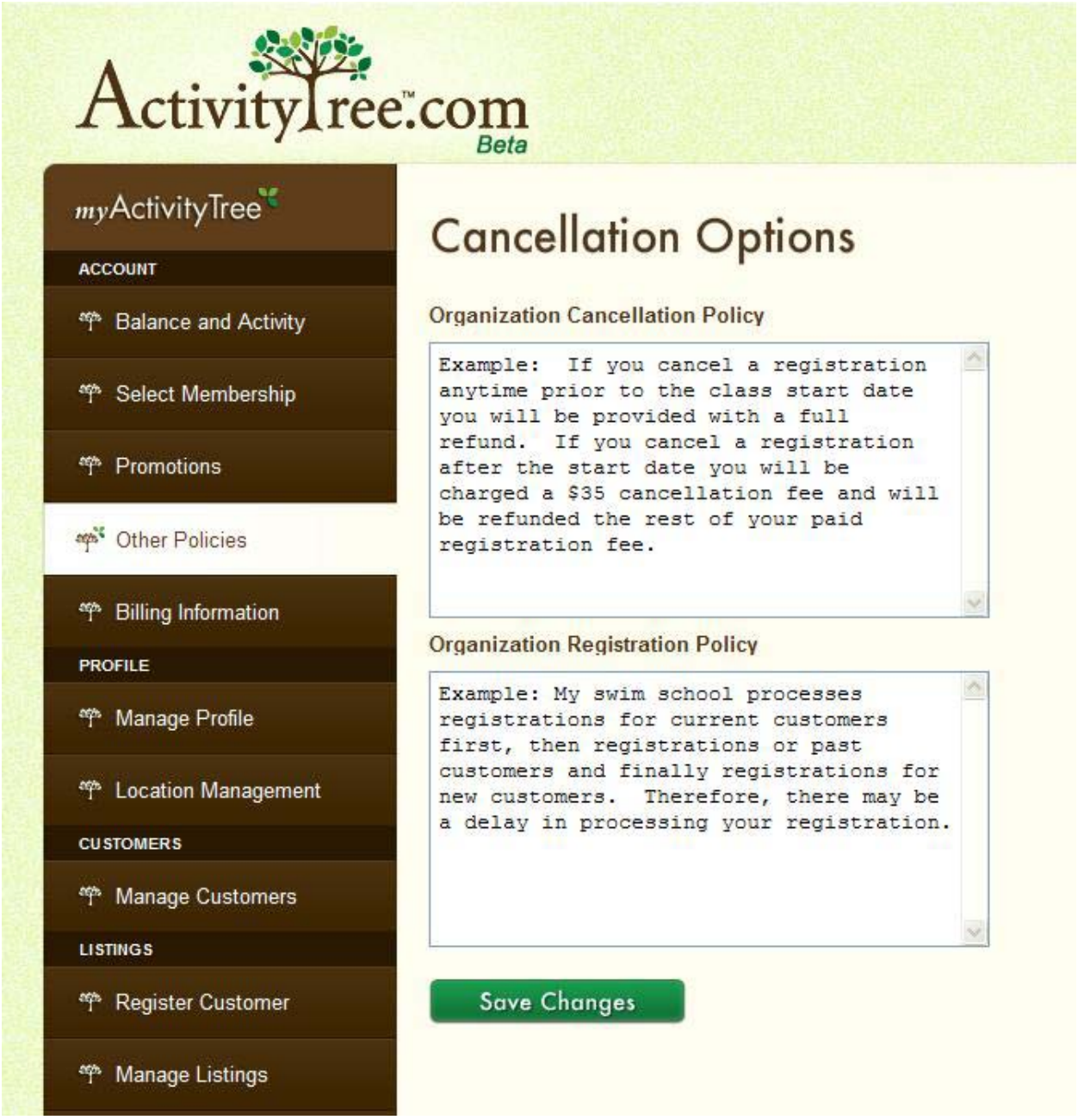
Late Registration/Prorated Payments

- Discount reflected in the listing price
- Description under the listing price

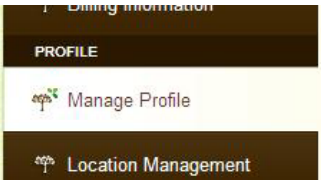
Create Cancellation and Registration Policy

Click Other Policies from the left navigation bar. ActivityTree lets you define your cancellation and registration policies. Your cancellation policy will be displayed in the activity listing detail for a customer to review prior to registration, in the customer receipt and in a pop-up prior to completing a cancellation. Your registration policy will be displayed in the activity listing detail for a customer to review prior to registration and in the customer's receipt. All customers with questions regarding your registration and cancellation policies will be directed to you.

All customers will be directed to you for any applicable refunds or credits. ActivityTree does not issue refunds.



Manage Your Profile



Click Manage Profile to add billing information and to upload forms.

Check the populated fields – name, description, address and contact information. Make changes if necessary.

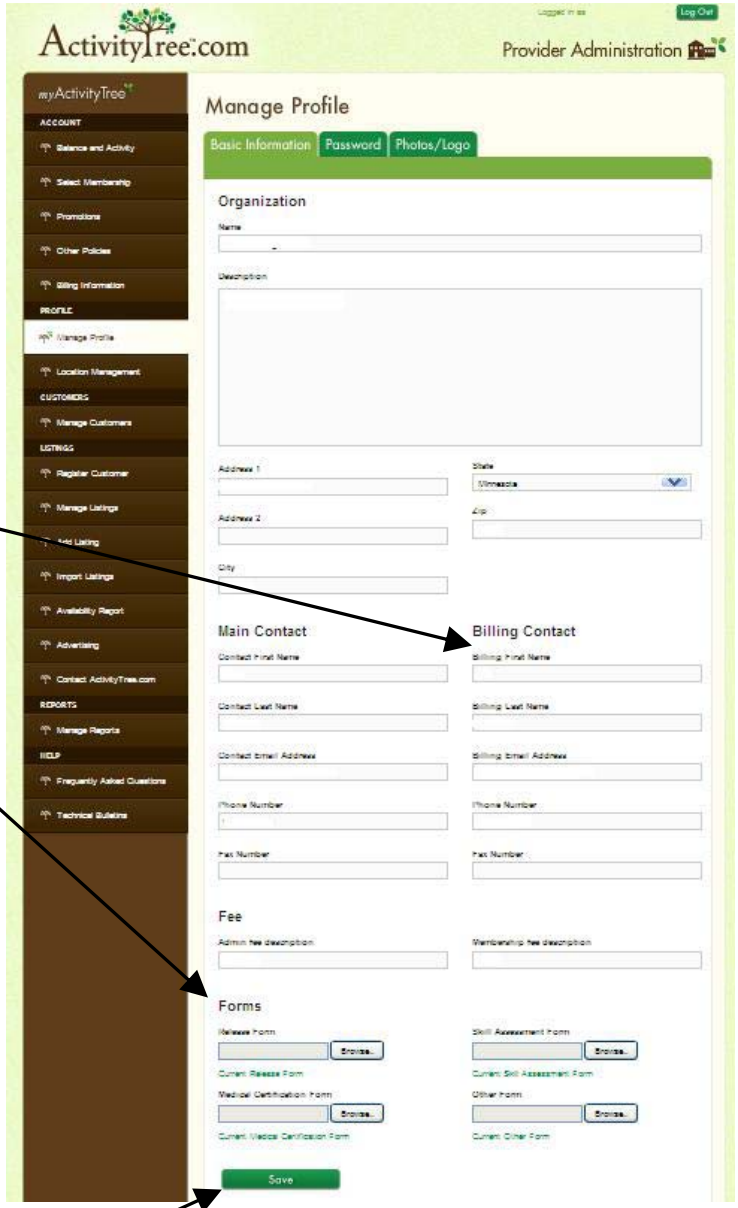
Complete the following:

- Billing Contact Fields

Here you can attach various forms related to your activities.

- Release
- Medical Certification
- Skill Assessment
- Other forms

These forms will be available to the customer for download in the activity listing detail.



Click Save when Finished

Upload your Logo and Photos

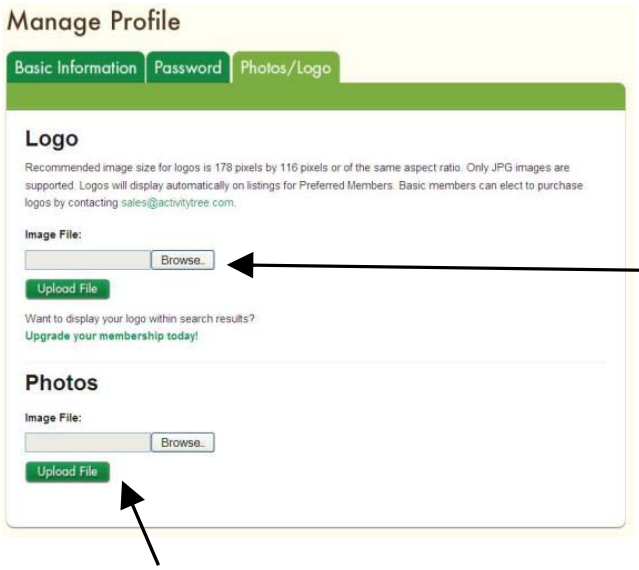
Click Manage Profile from the left navigation bar and then click the Logo/Photos tab.

LOGOS: Recommended image size for logos is 178 pixels by 116 pixels or of the same aspect ratio. Only JPG images are supported. ***File name for your logo should include your company name, e.g., ABCBoxing_Logo.JPG.*** Logos will display automatically on listings.

PHOTOS: Photos will be displayed in the detailed description of each of your listings and in the Provider Directory. Only JPG images are supported with the size of 2MB or less. The actual size of the photos is 300 x 300 pixels. Your photos will look best if each uploaded photo has the same proportions. ***File names for your pictures should include your company name, e.g., ABCBoxing_pic1.JPG.***

We recommend these photos be of your facility, staff, in session classes etc. Photos for specific activities can be added through manage listings.

Logos & Photos can be updated or changed at anytime.

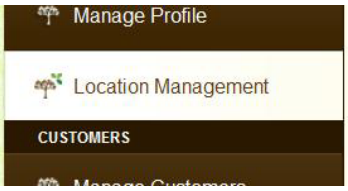


- Click the Browse button and locate the logo on your computer
- Click Upload File

<u>You have the ability to load up to 4 photos</u>

- Click the Browse button and locate the pictures your computer
- Click Upload File
- Upload 1 picture at a time

Location Management



Click **Location Management** on the left navigation bar. ActivityTree allows you to manage multiple locations with one account. We do not recommend using a single account if you manage registrations and schedules at each location independently. If all your activities occur at your main location (the address you already entered in the Basic Information Form), you do not need to complete the Location Management form.

- Click Add Location
- Complete the additional location information
- Click save

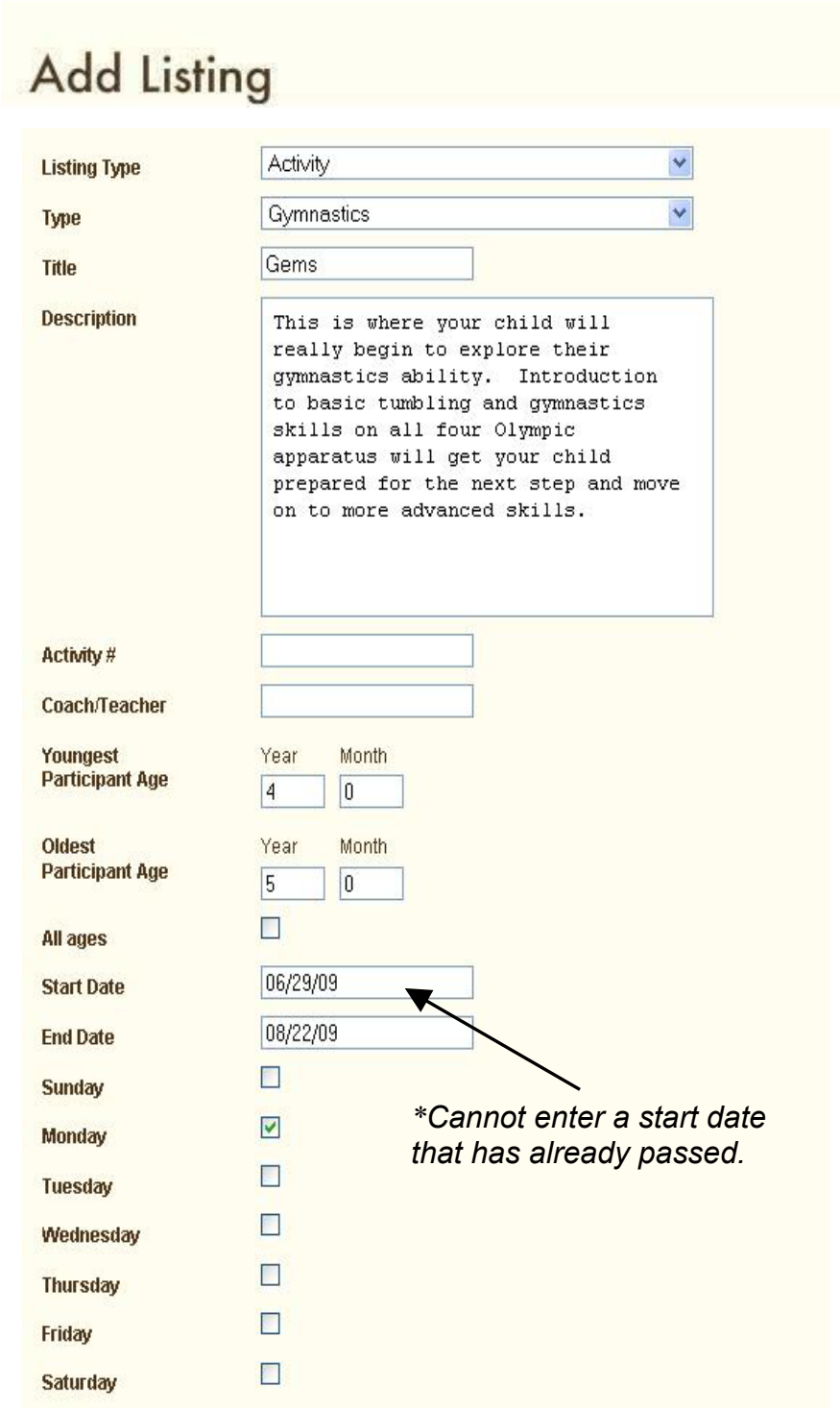
Use location codes for multiple locations to make managing your listings and reports easier.

Add Listings

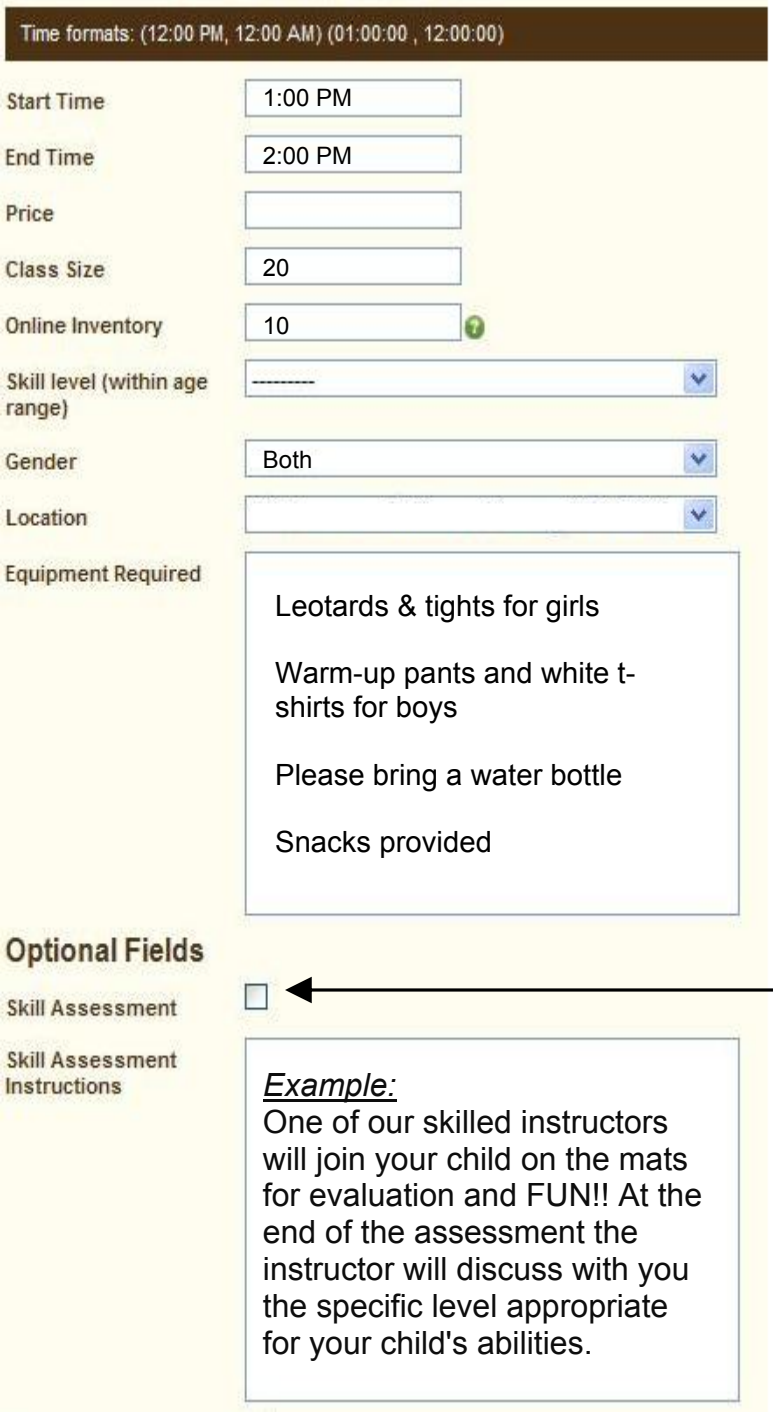
Click **Add Listings** on the left navigation bar to add listings. The Add Listings feature allows you to enter listings manually. If you have more than 40 listings, we recommend that you import your Listings. Contact sales@activitytree.com for instructions on how to import listings.

Entering Listing Information:

- Choose Activity or Camp
- Choose activity type (e.g. gymnastics)
- Enter the name/title of the offered activity/camp
- Enter a description that tells potential customers all they need to know about this activity/camp
- Enter your activity/camp number (optional)
- Coach/Teacher name (optional)
- Youngest to oldest participant age
- If open to anyone, please check all ages box
- Enter start and end dates
- Check the days of the week the activity/camp occurs



Add Listings Continued



Entering Listing Information:

- Start & End times (see time format examples)
- Price
- Class size
- Online inventory
  - ➢ *Number of registrations allocated to ActivityTree. Preferred B members must set online inventory equal to class size*
- Skill level
- Gender
- Pick location
- Enter in any instructions for specific equipment needed for the activity/camp (optional)
- If skill assessment is required, place a check mark in 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.*

Add Listings Continued

Entering Listing Information:

- If your activity/camp has a prerequisite, place a check mark in the box and enter in a detailed description. (Optional)

- If you require a release to be signed, check the box and provide instructions to complete (Forms may be uploaded in manage profile) (Optional)

- If you require medical certification, again, check the box and provide detailed instructions for your customers to ensure compliance (Forms may be uploaded in manage profile) (Optional)

Click “Add Listing” when finished