

Parent Portal – Create Services

NEVER REUSE EXISTING SERVICES, ALWAYS CREATE NEW

- 1. From the Parent Portal Configuration Tool (PPCT) Main Menu, select Setup Unit Services & Fees.
- 2. Select the Unit that you are creating the service for.
- 3. Click on Add in the lower left corner.
- 4. Enter a Service Name & Abbreviation, select a Service Type and Default Account Code, enter a Description.

Add Service			
Service Name: Test Service	Service Abbrv: TS	(max 10 characters)	
Fixed Price - Participants are charged one single flat fee. This fee is paid in full up front to enroll. For example, Spring Break or Winter Break services. The number of days of service do not factor into the cost.	Choose Service Type C Recurring Billing - Based on Daily Rate C Recurring Billing - Monthly Flat Fee C One Time Payment C Drop-In Fixed Price C Free		
Service Summer Session is a fixed Price service. This entails a sin Description:	MER - Summer Session gle flat fee paid up front.	X]
	Add	<u>C</u> ar	icel

- 5. Click Add and confirm that you want to add this service in the pop up box.
- 6. In the Member Tracking System[™] from the Main Menu, select Groups.
- 7. In each unit that will be using this service, add a Group with the same name as the Service, so that the members can be enrolled in the Group.

- 8. Back in the PPCT, Select the unit then edit the Service for each unit that will be using this new service.
- 9. Attach the corresponding Group to the Service. Add any prerequisites that are needed.

Units						
Central Unit						
East Unit						
North Unit						
Edit Unit Service Properties						
Service Name: Test Service	Service Abbry: TS	(may 10 characters)				
		(maxic characters)				
Fixed Price - Participants are charged one single flat fee. This fee is paid in full up front to enroll. For example, Spring Break or Winter Break services. The number of days of service do	Choose Service Type					
not factor into the cost.	Recurring Billing - Based on Daily					
	Recurring Billing - Monthly Flat Fee					
	O One Time Payment					
	© Drop-In © Eixed Brice					
	O Free					
Values for this Unit Only Default Values (All United)						
Values for this onit only [Default values (All Onits)]		1				
	() + () - + 1					
Text Box Style front.	flat fee paid up					
O Plain Text						
Rich Text						
Account Code: SUMMER - Summer Session						
Capacity						
Capacity.						
waiting List Group:		<u> </u>				
Assign Member to Group (REQUIRED): North Unit - Test Service		<u> </u>				
Insert the selected RATE CATEGORY daily value into Custom F	ield:	<u> </u>				
		<u>U</u> pdate <u>C</u> ancel				

10. If there is a similar existing Service you have the option of copying any one or more of the following from one Service to another: Attendance Calendar, Rate Amounts, Discount Amounts, Manual Payment Schedule, Custom Field Assignment, Group Assignment.

Jer	vice: Test Service				
	check one more	Attendance Calendar	Manual Paymen	it Schedule	
	items to copy:	Rate Amounts	Custom Field As	signment	
Constant		Discount Amounts	Group Assignme	ent	
Select one	Test Service			Central Unit	_
or more	Test Service			East Unit	_
services)	Test Service			South Unit	
	Test Service			West Unit	
	Example Service 01	(Recurring Billing: Daily Rate)		Central Unit	
	Example Service 01	(Recurring Billing: Daily Rate)		East Unit	
	Example Service 01	(Recurring Billing: Daily Rate)		North Unit	
	Example Service 01	(Recurring Billing: Daily Rate)		South Unit	
	Example Service 01	(Recurring Billing: Daily Rate)		West Unit	
	Example Service 02	Recurring Billing: Flat Monthl	y Fee)	Central Unit	
	Example Service 02	Recurring Billing: Flat Monthl	y Fee)	East Unit	
	Example Service 02	Recurring Billing: Flat Monthl	y Fee)	North Unit	
	Example Service 02	Recurring Billing: Flat Monthl	y Fee)	South Unit	
	Example Service 02	Recurring Billing: Flat Monthl	y Fee)	West Unit	
	Example Service 03	Recurring Billing: Flat Monthl	y Fee)	Central Unit	
	Example Service 03	Recurring Billing: Flat Monthl	y Fee)	East Unit	
0 Unit	Example Service 03	Recurring Billing: Flat Monthl	y Fee)	North Unit	
Services	Example Service 03	Recurring Billing: Flat Monthl	y Fee)	South Unit	
Selected	Example Service 03	Recurring Billing: Flat Monthl	y Fee)	West Unit	
elect None	Example Service 04	Recurring Billing: Flat Monthl	y Fee)	Central Unit	
ciccentonic	Example Service 04	Recurring Billing: Flat Monthl	v Fee)	Fast Unit	

11. Otherwise, you manually select dates by clicking on them individually or use Fast Fill. Days turn blue when they are selected.

	Calendar	Rates and	Discounts			
Fast Fill (Calendars Da	ys - Unit Servi	ce Calendar			
Creat	e Calendar	Days betwe	een			
	<u>b</u> etweer	01/02/2	2017	<u>a</u> nd: 0	01/06/17	
fo	or days:	Sun Mor	Tue Wee	d Thu Fr	i Sat	
			C <u>r</u> eate			C <u>l</u> ose
Fast Fill	8 Janu S M T 1 2 3	ary 2017 W R F S 4 5 6 7	3 Februa S M T	ary 2017 W R F S 1 2 3 4	3 Mar S M T	th 2017 W R F S 1 2 3 4

12. If you are not copying Rate Amounts, Discount Amounts, in, add or edit rates (and discounts, if used) manually.

Calendar F	lates and Discounts				
Rate Cate	egories				
\angle	Rate Category	Amt	Default	Active	
Full R	ate	\$0.00			
Speci	al Rate 1	\$0.00			
Speci	al Rate 2	\$0.00			
					-
					- -
					_
					_
					_
			lata		
			lete		
Discount	Categories (use positi	ve value	s)		
\angle	Description		Amt	Active	
Multi	ple Children		\$0.00		
					_
	Add Edit		lata		
	Adu Edit	De	iete		

13. Then all that is left is to set the service to active when you are ready for it to go live on the Portal.

Z Abbrv	Service	Capacity	Enrl	Туре	Grp	srcf	Active
TS	Test Service		0	FP	Y		