

# Transfer a Registrant to a New Class (in a Different Course) and Transfer Payment

- When transferring a participant to a new Class in a different Course, the original registration must first be cancelled.
- Before cancelling the original registration, double-click into the payment for the original Class, and write down the **Reference** number.

[8	020557] Payment		
	Payment Type Payment Date	ePayment	
	Reference	17112032	
	Amount Note	\$112.00	
(	🚊 Reports 🖂 E	mail	Close

 If necessary, gather the answers from the Questions tab on the original registration by pulling the Registration Questions by Student report at the Class level into Excel, to copy and paste the answers into the new Registration in the final section of this article titled, "Register for a New Class via a Walk-In Registration," within Step #6.

NOTE: The following procedures are determined by the price of the new Class. To avoid errors in processing a refund and transferring the money correctly, please refer to the appropriate example.

## When the Price of the New Class is the SAME or HIGHER:

**1.** To cancel the registrant out of the current Class, navigate to the **Class**, and open the **Registration** by double clicking on the person's name.

lass Number rogram	20/21 Girls	Basketball			-	Enr	olled
ourse onf. Email	High School	Basketball				Wai	tlist
ieneral I	instructor &	Expenses Schedule	Arrangements	Registration	Waitlist Receipt Invoice		
egistrations	Registr	ation Email					
	Date	Name	Status	Reference	Method	Paid	Balance
e –	7/16/2020	Bambery, Liam	Cancelled	17112015	ePayment	\$0.00	\$0.00
<b>30</b>	7/29/2020	Moeller, Amanda	Enrolled	17112027	ePayment	\$100.00	\$12.00
<b>**</b>	8/11/2020	Moeller, Elizabeth	Enrolled	17112033	ePayment	\$112.00	\$0.00
	9/28/2020	Moeller, Hannah	Cancelled	17112042	ePayment	\$50.00	\$0.00
	7/16/2020	Moeller, Jenny	Enrolled	17112014	ePayment	\$112.00	\$-20.00
	7/16/2020	Moeller, Rebecca	Enrolled	17112017	ePayment	\$112.00	\$0.00
	8/7/2020	Moeller, Samantha	Enrolled	17112032	ePayment	\$112.00	\$0.00

2. Click on the Enrolled drop-down menu and select Cancelled. When asked, "Are you sure you want to cancel this registration," select OK.

8905123]	Registration	
Name	Moeller, Samantha	Enrolled
Class	20/21 Girls Basketball High School Basketball	Cancelled
Pricing	Standard	Enrolled
	Additional Student	
Paymer	It Invoice History Questions Contract History Attendance N	otes & Emails

**3.** Complete the details for the cancellation:



- a. If there is a cancellation fee, enter that amount in the Cancellation Fee field.
- b. Select **Other** as the **Credit Type.** Enter the reference number of the original payment into the **Reference** field followed by "/transfer." (e.g. 17112032/transfer)
- c. Click on the **Calculator** button to fill the **Amount** field with the total amount paid on this class that will be transferred.
- d. The box, Leave Balance Due on Registration, remains unchecked.
- e. Comments for internal use may be entered into the **Note** field for future reference.
- f. Once all fields are completed, select **Save**.

g. The account should now show a balance of **\$0**. Once the changes have been reviewed for accuracy, select **Save**.

Payment Invoice His	tory Questions	Contract H	listory	Attendance	Notes & Er	mails	
Registered	08/07/2020 9:38 AM	Pay	ments	Adjustments	Deleted		
Price	\$100.00		Date	Method		Amount	
Adjust	\$-100.00	0	8/7/2020	) ePayment		\$112.00	1
Total	\$0.00		10/9/202	0 Other		\$-112.00	
Paid	\$0.00						
Balance	\$0.00						
📃 Update Accou	Int On File						
Card Type, Last 4 Digits	Visa 1111						
Expiration Date	08/23						
🗍 Delete Card	l On File						
Reports					~	Cancel 🔚 S	ave

4. Proceed to the Register for the New Class Via Walk In section in this article to complete the transfer.

# When the Price of the New Class is LESS (Refund Required):

#### Part 1: Process the Cancellation and Refund

**1.** To cancel the registrant out of the current Class, navigate to the Class, and open the Registration by double clicking on the person's name.

lass Numbe rogram purse onf. Email	r 20/21 ARC L Aquatics Lifeguard Tr	ifeguard Training raining			-	Enr Wai	olled
eneral egistration	Instructor & s Registr	Expenses Schedule ration Email	Arrangements F	Registration	Vaitlist F	Receipt Inv	voice
	Date	Name	Status	Reference	Method	Paid	Balance
ه 🗖	10/9/2020	Jones, Blake	Enrolled	14133006	ePayment	\$250.00	\$0.00
	9/16/2020	Jones, Heather	Enrolled		Cash	\$250.00	\$0.00
<b>**</b>	9/9/2020	Lamb, Hank	Enrolled	17310004	ePayment	\$250.00	\$35.00
	9/9/2020	Lamb, Sam	Cancelled	15837071	ePayment	\$125.00	\$0.00
	8/6/2020	Mannix, Jaimee	Enrolled	15843029	ePayment	\$150.00	\$-15.00
	8/6/2020	Mannix, Kirstyn	Cancelled	15843030	ePayment	\$0.00	\$0.00

2. Click on the Enrolled drop-down menu and select Cancelled. When asked, "Are you sure you want to cancel this registration," select OK.

[14186622]	Registration	
Name	Jones, Blake	Enrolled  V Select One
Pricing	20/21 ARC Lifeguard Training Lifeguard Training Standard	Cancelled Enrolled
	Additional Student	

- **3.** For payments which do not involve a credit card, select the appropriate option in **Credit Type**, making internal comments as needed in the **Note** field.
- **4.** For credit card transactions, select **ePayment** as the **Credit Type**. Leave the **Reference** box empty. This field will auto-fill with the refund reference number once processed.

[NEW] Registration Can	cellation
Cancellation Fee	\$100.00
Credit Type	ePayment 🗸
Credit Date	10/09/2020
Reference	
Amount	\$150.00 Process Refund Now
-	<ul> <li>Leave Balance Due on Registration</li> </ul>
Note	Transfer from ARC Lifeguard (\$250) to Football (\$100).
	🗙 Cancel 🗖 Save

- a. Enter the price of the NEW class in **Cancellation Fee**, keeping it as payment for the new class.
- b. Click on the **Calculator** button next to **Amount** field. Review this amount for accuracy.
- c. Check the box next to Leave Balance Due on Registration.
- d. Comments for internal use may be entered into the **Note** field for future reference.
- e. Once all the necessary fields have been completed, select the Process Refund Now button. A window will open with the following message, "You will be refunding to this customer's account. Are you sure you want to refund \$xx.xx back to the customer's account? In this step, only select OK; <u>DO NOT SELECT SAVE</u>.

5. The refund and the remaining balance will be reflected in the **Registration** screen. Now, select **Save**.

[14187434] Registration						
Name Jones, Tom			2		Cancelled	~
Class 20/21 ARC Lifegu	ard Training Lifeguard Tr	raining				26
Pricing Standard						
Additional	Student					
Payment Invoice His	tory Questions	Contract H	istory	Attendance	Notes & Emai	ls
Registered	10/09/2020 2:01 PM	Payn	nents	Adjustments	Deleted	
Price	\$250.00		Data	Mathad		
Adjust	\$-150.00	6	10/9/202	Payment	A	\$250.00
Total	\$100.00		10/9/202	20 ePayment		\$-150.00
Paid	\$100.00					
Balance	\$0.00					
🔜 Update Accou	unt On File					
Card Type, Last 4 Digits	Visa 1111					
Expiration Date	08/22					
🗍 Delete Caro	d On File					
					X Ca	ancel 🗖 Save

## Part 2: Transfer the Remaining Payment:

1. In the original class, notate the payment transfer from this class by clicking on the Add button (

[NEW] Payment	
Payment Type	Other 🗸
Payment Date	10/09/2020
Reference	17112032/transf
Amount	\$-100.00
Note	Transferring to Football
	💥 Cancel 🔚 Save

- a. Select **Other** as the **Credit Type.** Enter the reference number from the original payment made into the **Reference**\_field\_followed by "/transfer." (e.g. 17112032/transfer)
- b. Enter the dollar amount of the new class in the **Amount** field as a negative amount. (e.g. If the new class is \$100, enter -\$100)
- c. Comments for internal use may be entered into the **Note** field for future reference.
- d. Once all fields are completed, select Save.

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**2.** To adjust the balance to \$0, in the **Registration** window select the **Adjustments** tab. Click the **Add** button (

[14187434]	Registration						
Name	Jones, Tom			20		Cancelled	~
Class	20/21 ARC Lifegua	ard Training Lifeguard Ti	raining				26
Pricing	Standard						
	Additional S	Student					
Paymen	t Invoice His	tory Questions	Contract H	listory	Attendance	Notes & Ema	ils
Register	red	10/09/2020 2:01 PM	Pay	ments	Adjustments	Deleted	
Price		\$250.00					
Adjust		\$-250.00	0	Date	Reason	-	Amount
Total		\$0.00		10/9/20	J20 Cancellatio	11	\$-150.00
Paid		\$0.00					
Balance	:	\$0.00					
	🔜 Update Accou	int On File					
Card Ty	pe, Last 4 Digits	Visa 1111					
Expirati	on Date	08/22					
	🗍 Delete Card On File						
Report	ts					<b>×</b> c	ancel 🗖 Save

**3.** In the **Adjustment** window, add a negative adjustment in the amount of the balance remaining on the registration. Select **Save**.

nt		
10/09/2020		Show On Invoice
\$-100.00		
Transfer from ARC to Fo	ootball	
		/
	(	X Cancel 🔚 Save
	nt 10/09/2020 \$-100.00 Transfer from ARC to Fe	nt       10/09/2020       \$-100.00       Transfer from ARC to Football

- **4.** Confirm that the account now reflects a \$0 balance.
- 5. Proceed to the Register for the New Class via Walk-In Registration section in this article.

## Register for the New Class via a Walk-In Registration

<u>NOTE</u>: Once the Registration for the original Class has been cancelled and the payment has been removed, the next step is to make a new Registration using the Walk-In Registration feature. This will complete the payment transfer to the new Class.

**1.** Begin a walk-in registration by clicking on the **Register** button.



2. Navigate to the class to which the student is being transferred.



**3.** Once the correct class is located and selected, select the **CLICK HERE to Register for this Class.** Note that the Walk In Registration process for Admin/Users reflects current Registrations and class size limit.

High School Football	
Class #: 20/21 Varsity Football Date: 10/1/2020 - 3/31/2021	2
Days: Tu, Th Time: 3:00 PM - 6:00 PM	
Price: \$100.00	
CLICK HERE to Register for this Class (	<u>5 of 50)</u>

- 4. Search for the account holder's last name and click on the appropriate name from the options list.
  - **NOTE:** This will **not** bring up the registrant's name unless the registrant is also the account holder.
- 5. Select the radio button next to the name of the student you are transferring to this class.

	Who are you registering?			
	Please select the person you would like to register for High School Football.			
	O Tom Jones (self)			
	O Heather Jones (other)			
	O Blake Jones (other)			
	O A New Person			
- 1				

- 6. Complete the question profile that is attached to this class using the answers on the **Registration Questions by Student** report.
- 7. At the bottom of the registration, select **Other** as the payment type, and click **Checkout**.

8. In the Pay box, verify that the amount is the same as what was paid on the original registration.

**NOTE:** If the amount of the new class is more than the original class, enter the amount paid for the original class. The additional unpaid amount will be added as a balance on the registrant's registration.

 Select Other as the Payment Type, enter the reference number into the Reference box followed by "/transfer." (e.g. 20724002/Transfer) and Submit.

Class		Cost	Pay			
Aquatics (Grades 9th-12th) Smith, Bill		\$150.00	\$150.00	Remove		
Total: Payment Type:	Fotal: \$150.0 Payment Type: Other		inter the amoun at was transferre	it ed is.		
Reference:	20724002/Tr	ansfer				
Submit						

**10.** If the registration completed successfully, a new page with a link to the receipt will appear, and the receipt will automatically be sent to the email address on file for the account holder. This receipt will reflect any remaining balance for the new Class.