Vision Computer Programming Services, Inc.
801 2ⁿᵈ Street North, Suite A   Safety Harbor, FL 34695
888-425-6964   email@visioncps.com   www.visioncps.com

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.

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.

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.

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

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

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.

Abbrv	Service	Capacity	Enrl	Type	Grp	srcf	Active
TS	Test Service		0	FP	Y		☐