

MoeGo Cheat Sheet

Apply Package Credits to Sleepover/Stay-n-Play/Day-n-Play

1. Client Profile > Packages > Edit Button on the specific Credit
2. Deduct Credit(s)
3. Repeat 1&2 for each Package credit to be applied
4. Add Store Credit for value to be applied (\$41.15 each credit (39 + tax))
5. Apply Store Credit at Checkout

Apply Membership Credits to Sleepover/Stay-n-Play/Day-n-Play

1. Client Profile > Memberships
2. Open the '> Purchased On xx/xx/xxxx' section(s)
3. Locate the 'Enrichment Day Care (Member)' credits in the 'Benefits overview' section
4. Under 'Remaining' hover over the opposing arrows icon, click to 'Transfer to credit'
5. Repeat 2, 3 & 4 for each '> Purchased On xx/xx/xxxx' section of credits that will be used
6. Add Store Credit for value to be applied (\$41.15 each credit (39 + tax))
7. Apply Store Credit at Checkout

Add Store Credit

1. Client Profile > Payment > Store Credit – click Edit icon
2. Enter the amount of Increase or Decrease
3. Select a Reason (ex. Use 'Transfer from other business perks' for Package/Membership credits)
4. Enter details in 'Please specify' (ex. 'Applying package credit to boarding stay')
5. Click 'Confirm'

Apply Store Credit at Checkout

1. From 'Home' click 'Start checkout'
2. Click 'Proceed to checkout' in the 'Review and confirm' pop-up if it appears
3. Either:
 - 3.1. Click the 'Store credit' button, apply the amount of store credit to be used, click charge now and complete the remaining payment with the desired payment method
 - 3.2. Or click 'Split payment', then 'Select payment method' and 'Store credit' apply the amount of store credit to be used, click charge now and complete the remaining payment with the desired payment method
4. Complete transaction normally

Complete Overdue Payment

1. Client Profile > Overdue > Make Bulk Payment > (then chose payment method, etc.)

OR

2. Client Profile > Overdue > Click individual invoice > Charge now (then chose payment method, etc.)

Print or Email Receipt for transaction

1. Client Profile > Payment history > Scroll Right to Appointment ID > Click the specific Appointment ID
2. Click 'View invoice' at bottom (not drop-down arrow)
3. Click 'Print' or 'Email' icon (if printing, click 'Print' button, then be sure to select tray 1 in the print dialog as normal)

Add a Membership

1. Client Profile > Memberships > Add New membership

Sell an At-Will Package

1. Home (or any page the + appears) > + > Sell packages
2. Search for the client
3. Select the desired package
4. Select the payment method to be used
5. Click 'Charge now'

Add a Day of Daycare at (2-3+) Membership level

1. If the client has an active Membership (a Membership that has run for that week):
 - 1.1. Schedule the additional day, when the client checks out that day it should charge at their membership level (double check!)
2. If the client does not have an active membership:
 - 2.1. Apply appropriate discount at check-out

Undo Check-In

1. Click the reservation (blank space, not words)
2. Hover over 'Checked in'
3. Click 'Undo check-in'

Sign Agreement or Send Sign Agreements Request

1. If signing now, log into MoeGo on the iPad
2. Client Profile > Agreements > Unsigned
3. Click 'Sign now', 'Sign by email' or 'Sign by text' icon