

## **UGA OUTDOOR RECREATION – OUTDOOR RECREATION (ORC) – ADDING INVENTORY IN FUSION**

**Purpose:** The purpose of this document is to outline the procedure by which staff members add equipment to Fusion for inventory.

**Scope:** The Outdoor Recreation Center (ORC) sells and rents thousands of dollars' worth of inventory each year. The following protocol will provide a step-by-step guide by which an employee can add or remove items from Fusion's inventory.

### **Adding inventory items to Fusion:**

- I. LOGGING IN
  - a. Turn on computer and log in using computer access credentials.
  - b. Open Fusion and log in using UGAID and password.
  
- II. SALES
  - a. To make a sale, click on "Sales" in the upper right corner.
  - b. Click on "customer" and enter the customer's 810/11 number. "Select customer."
  - c. Click on the item you wish to sell.
  - d. Increase (+) or decrease (-) quantity in the upper left corner.
  - e. Click "checkout" on the right-hand side of the screen.
  - f. Select method of payment.
  - g. If the patron paid upstairs (Business Office), enter the authorization number.
  - h. Click "complete." 2 receipts will print; one for the cash bag and one for the customer.  
SALES TAX IS AUTOMATICALLY CALCULATED INTO THE TOTAL.
  
- III. RENTALS
  - a. To rent equipment, click on "equipment" in the upper right corner.
  - b. Click on "customer" and enter the customer's 810/11 number. "Select customer."
  - c. Click on the correct category of equipment (i.e. "backpacks")
  - d. Click on the correct item (i.e. "BP-U-02")
  - e. Select the correct rental time period.
  - f. Add more items using the same above method or click "Pay Now" in the bottom left corner.
  - g. For multiday rentals, you will need to manually adjust the price to reflect a UGA weekend rental rate vs. a 3-day standard rental in Fusion.

- h. Complete the transaction using the “Point of Sale” interfaces as described in the “Sales” section.
  - i. REMINDER: Renters also need to fill completely out a carbon copy (yellow) rental agreement.
  - j. One receipt from Fusion should get stapled to the yellow copy of the rental agreement and given to the customer. The other Fusion receipt should get stapled to the white copy of the rental agreement and kept for our records.
- IV. UGA OUTDOOR REC STAFF FREE RENTALS
- a. Proceed through steps “A” through “F” in the “Rentals” section.
  - b. Click on the “pen” image under the rental item.
  - c. On the “Price Adjustments” page, select 100% discount and click “OK”
  - d. The employee will not be charged for the rental. Still proceed with a rental agreement and regular checkout procedures as outlined in the “Rentals” section.
- V. RETURNING EQUIPMENT / LATE & DAMAGE/REPLACEMENT FEES
- a. Click on “customer” and enter the customer’s 810/11 number. “Select customer.”
  - b. Under “items checked out,” click on the “Check In” button for each item that was checked out.
  - c. If there are any damages or late fees, follow the appropriate procedure below.
    - i. Late fees
      1. Click on the “Category” tab in the top right corner.
      2. Select the “Late Fee” folder.
      3. Click on “ORC late fee.”
      4. Click on (+) to add the appropriate amount.
      5. Click on “Check out” and follow the same point of sale procedures as outlined above.
    - ii. Damage/replacement fees
      1. Click on the “Category” tab in the top right corner.
      2. Select the “Damage” or “Replacement” folder.
      3. Click on the actual damage or replacement item.
      4. Click on “Check out” and follow the same point of sale procedures as outlined above.
- VI. END OF DAY REPORTING
- a. We submit 2 reports each evening. One is found in the “Sales” view (Report 1) and one is found in the main “Fusion” view (Report 2).
    - i. Report 1
      1. Make sure you are in “Point of Sale” / “Sales” view.
      2. Click on the down arrow next to the left of the “Sales” tab.

3. Select "Tender Summary for All Users." Click "Yes."
  4. Place one receipt in the cash bag and discard other receipts.
- ii. Report 2
1. Click on the "Fusion" button in the far top left corner.
  2. Click on "Reports" (under "Tools"), "Sales," "Daily Balance Report" (Number 8).
  3. Select the current date and time from 6AM to midnight.
  4. Select the staff that worked on that day and "In-person" method of sale.
  5. Run and print the report.