



Tyler Parks and Recreation

User Guide
2018.3

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Tyler Parks and Recreation

Tyler® Parks and Recreation is a web-based application designed to manage recreation class schedules, registrations, contact lists, and facilities. The application consists of a management component that provides the setup and administration features, as well as the citizen portal, which makes the information available to citizens through the Internet.

Tyler Parks and Recreations provides citizens the opportunity to browse, view, and pay for recreation classes on line. Citizens can also order required or suggested materials for participation in their registered activities. Once registered, Tyler Parks and Recreation stores the contact information, including family relationship mapping and activity history.

A key component of Tyler Parks and Recreation is the class scheduling functionality, which you use to create and manage classes for your community. In addition to creating the classes, the class scheduling functionality also allows you to:

- Provide class registrant restrictions related to minimum or maximum age, gender-specific, or community residency requirements.
- Set class schedule time and duration, including the registration period.
- Provide a list of requirements or suggested tools for the class (for example, swim goggles, books, sewing tools, and so on).
- Create custom data-entry fields specific to a class type.
- Create reports of registrant and activity details.

For facilities personnel, the application provides scheduling functionality, as well as facility rental management features.

Configurable system settings provide role-based security options, custom field sets to be associated with classes, user-defined setup for class groups, class status, class type and fees, fee structure with general ledger account relationships for events and activities, and user-friendly portal presentation options.

Tyler Parks and Recreation includes GIS functionality that provides a heat map for a specified class. It also provides residency verification according to the registrant's physical address.

Tyler Parks and Recreation also provides customizable reporting using a Microsoft® SSRS (SQL Server Reporting Services) interface.

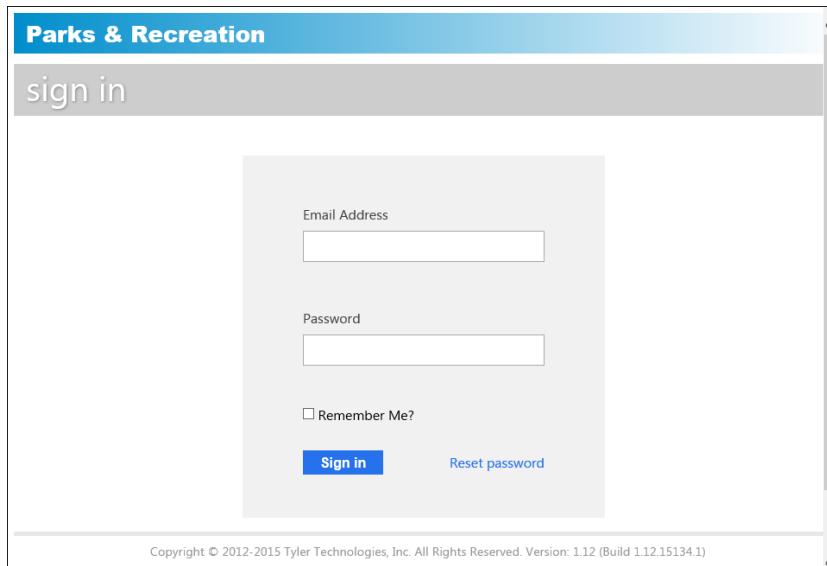
When you access the Administration pages for Tyler Parks and Recreation, the My Home, Parks & Rec, and Administration tabs are available. The Parks & Rec tab provides the contact, class, expense, rental, and report pages that your Parks and Recreation personnel use to manage programs and activities. The Administration tab manages the setup pages for the application, including system and portal settings.

Overview

The Tyler Parks and Recreation application includes many common options and procedures. These common items provide efficiencies for you, as once you are familiar with an option or process, it is the same throughout the remainder of the application. This section of the user guide describes these common options and processes.

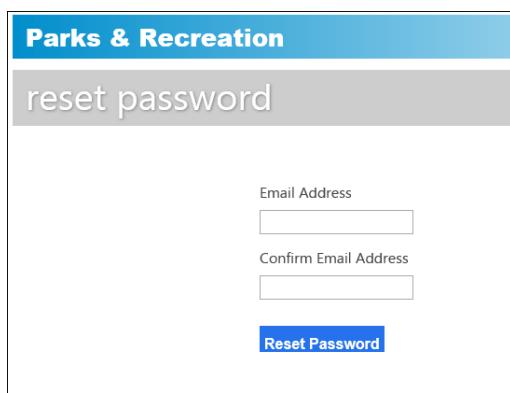
Sign In

The Sign In page for Tyler Parks and Recreation requires your email address and assigned password.



The screenshot shows the 'Sign In' page of the Tyler Parks & Recreation application. The page has a blue header bar with the text 'Parks & Recreation'. Below the header, the word 'sign in' is displayed in a grey bar. The main content area contains fields for 'Email Address' and 'Password', each with a corresponding input box. Below these fields is a checkbox labeled 'Remember Me?'. At the bottom of the form are two buttons: a blue 'Sign in' button and a blue 'Reset password' link. At the very bottom of the page, there is a small copyright notice: 'Copyright © 2012-2015 Tyler Technologies, Inc. All Rights Reserved. Version: 1.12 (Build 1.12.15134.1)'.

If you cannot remember your password, use the Reset Password option to receive a temporary password at an email address you specify.



The screenshot shows the 'reset password' page of the Tyler Parks & Recreation application. The page has a blue header bar with the text 'Parks & Recreation'. Below the header, the word 'reset password' is displayed in a grey bar. The main content area contains two fields: 'Email Address' and 'Confirm Email Address', each with a corresponding input box. At the bottom of the form is a blue 'Reset Password' button.

Once you receive the temporary password and you sign in, the program provides the Change Password page. You must enter and confirm a new password before continuing.

Search

Search pages vary according to the data stored for that category. For example, for Rental Registrations, the Search page provides multiple fields that you can use to narrow the results. In contrast, the Search page for Teams only allows you to search by keyword or specific team type or class.

Parks & Recreation

Rental Registration Search

Parks & Rec >> Rental Registration >> Rental Registration Search

Search Rental Registrations

Keyword	Rental S
<input type="text"/>	- Select -
Start Date	End Date
<input type="text"/>	<input type="text"/>

[Create](#) [Export](#)

Rental Number	Status
RNTL-01-2014-000004	Refunded
RNTL-01-2014-000005	Refunded
RNTL-02-2014-000006	Tentative
RNTL-02-2014-000007	Tentative
RNTL-02-2014-000008	Tentative
RNTL-03-2014-000009	Refunded
RNTL-03-2014-000010	Tentative
RNTL-03-2014-000011	Tentative

Parks & Recreation

Team Search

Parks & Rec >> Team >> Team Search

Search Teams

Keyword	Team Type	Class Name
<input type="text"/>	- Select -	- Select -



Team Name	Team Number	Type	Class Name	Create Date		
Adult League 1	02-2014-000009	Soccer - C	Adult Soccer	2/19/2014		
Best Boys	MH-08-2015-000014	Men's A1 Hockey		8/7/2015		
Bobcats	BB-08-2015-000012	Youth BB	Basketball I	8/7/2015		
Class Cowboys	MH-08-2015-000015	Men's A1 Hockey		8/7/2015		
Soccer - 2	08-2013-000002	Soccer - C		8/14/2013		
Soccer 1	08-2013-000001	Soccer - C	Indoor Soccer	8/14/2013		

← → Page 1 of 2 ▶ ▶ 10 ▼

View 1 - 10 of 12

Use the Search criteria fields to complete a search for specific records. For any search, leave all the fields blank and click the **Search** button to find all the records for that category. When a search completes, the page refreshes to display the results.

Parks & Recreation

Contact Search

Search Contacts
Show/Hide
⊖

Keyword
Gender
Registrant
Instructor
Resident
Contact Type

- Select -

Create
Export

- Create a new record
- Export the record or records to a Microsoft Excel spreadsheet



Contact Number
First Name
Last Name
Email Address
Gender
Contact Type
Registrant
Instructor
Resident

 07-2013-000001
Kathleen
Mullen
melfring@tylertech.com
Female

No
No
No
 

 07-2013-000002
Patrick
LeVesque

Male

No
No
No
 

 
Page **1** of 1 |     **10** 
View 1 - 2 of 2

Search Results

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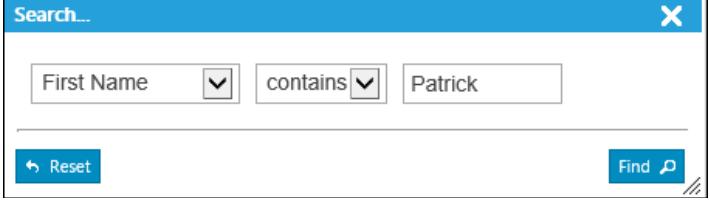
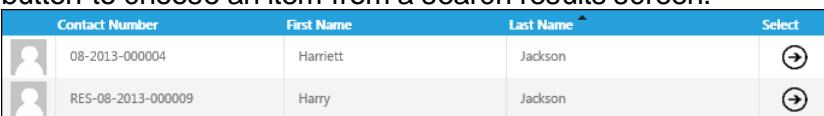
Button Options

Search results and detail pages provide multiple options for completing a process or maintaining data. Often the options are indicated by on-screen buttons. The following table provides a brief description for each option.

Button	Description
	Allows you to edit values for custom fields assigned to the selected category.
	Deletes the selected item.
	Provides a preview of an image or file. For example, on the Portal Settings page, click the Display button to view an existing logo file.
	Expand or collapse information panes on the screen.
	Provides an Edit dialog box for items specific to the selected record. For example, when you click the Edit button for the Class search results, the program displays

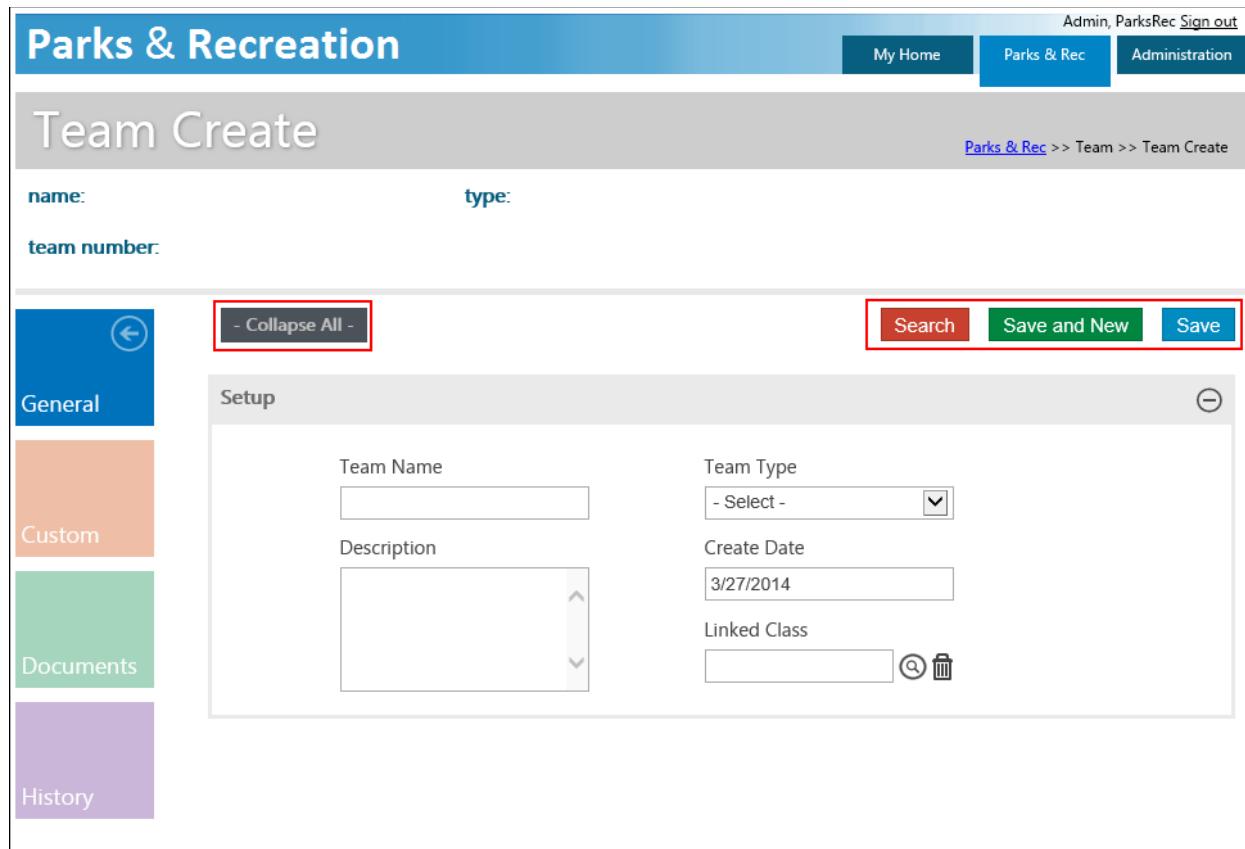
Tyler Parks and Recreation 2018.3

10

Button	Description
Edit	the Class Details page. On the Class Details page, when you click the Edit button for a specific record, for example, in the Registrants group, the Group dialog box is available for edit.
 Email	Sends an email message to the specified address for the selected registrants, user, or instructor.
 Print	Prints a receipt for an item. For example, in the Order History group for a Contact record, you can print a receipt for a paid item.
 Refresh	Restores the full list of results or details.
 Search	<p>Searches the selected category or group using defined statements.</p> 
 Search	Provides a list of available options for a field.
 Select	<p>Selects the specified item and displays the details. For example, click the Select button to choose an item from a search results screen.</p> 
 Add/Summary	Displays a Summary dialog box with details for the selected record. For records associated with payment, the Summary dialog box provides the options for completing payment.
 View Attachments	Provides attachments that are available for the selected record.

Create

When you select the Create option for a category, the page displays the data fields to complete within that category.



In addition, the Create pages include the Search, Save and New, and Save buttons:

- Click **Search** to return to the previous page. If there are existing records available, a list of these records displays.
- Click **Save and New** to save the current record and refresh the page to create a new record.
- Click **Save** to simply save the current record and remain on the page.

Use the **Collapse All/Expand All** option to display or hide the individual fields for all data groups on the page.

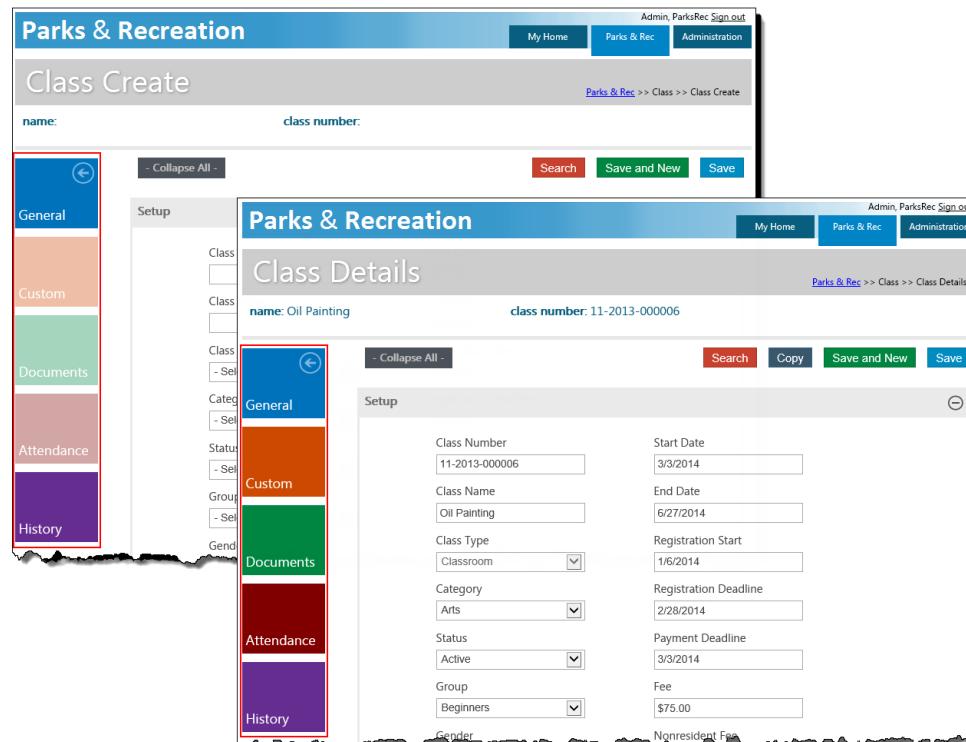
Program Options

Tyler Parks and Recreation includes various options associated with the programming setup and activities. These options display on the Create, Search, and Detail pages, and their availability varies according to the intended page activity. For example, the Attendance option is available for the Class Details page but not the Team Details page.

Program options include:

- General—Provides the core details for the selected record. This is the active option when you display a page.
- Custom—Provides access to custom field data. Custom fields are created using the Custom Fields option and assigned using the Custom Fields Layout options.
- Documents—Provides a list of documents that are provided to registrants on the citizen portal or that have been uploaded by participants using the citizen portal. Reports associated with the records may also be available using this option.
- Attendance—Provides a class list where you can indicate if a registrant attended for a specific date. You can export the attendance to a Microsoft Excel spreadsheet.
- History—Provides the history of changes for the selected record.

For Create pages, the colors for these options are muted, indicating that there is no active record for which to store additional information. For Detail pages, the colors for these options are bold to indicate that they are available for use.

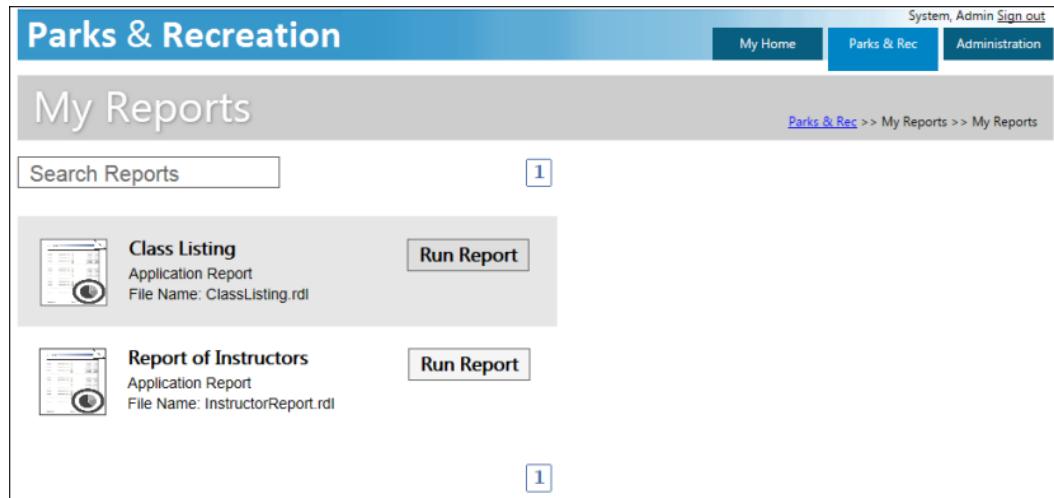


The screenshot displays two pages of the Parks & Recreation software. The left page is 'Class Create' and the right page is 'Class Details'. Both pages feature a vertical sidebar on the left with colored buttons for different program options: General (blue), Custom (orange), Documents (green), Attendance (red), and History (purple). The 'General' button is highlighted in blue on both pages, indicating it is the active option. The 'Custom', 'Documents', 'Attendance', and 'History' buttons are muted colors on the 'Class Create' page, while they are bolded on the 'Class Details' page, indicating they are available for use. The 'Class Details' page also shows a list of class fields with their current values.

Field	Value
Class Number	11-2013-000006
Start Date	3/3/2014
Class Name	Oil Painting
End Date	6/27/2014
Class Type	Classroom
Registration Start	1/6/2014
Category	Arts
Registration Deadline	2/28/2014
Status	Active
Payment Deadline	3/3/2014
Group	Beginners
Fee	\$75.00
Gender	
Nonresident Fee	

Report

When you select the Report option for a category, the program displays a list of available reports.



Parks & Recreation

System, Admin Sign out

My Home Parks & Rec Administration

My Reports

Parks & Rec >> My Reports >> My Reports

Search Reports 1

Class Listing
Application Report
File Name: ClassListing.rdl

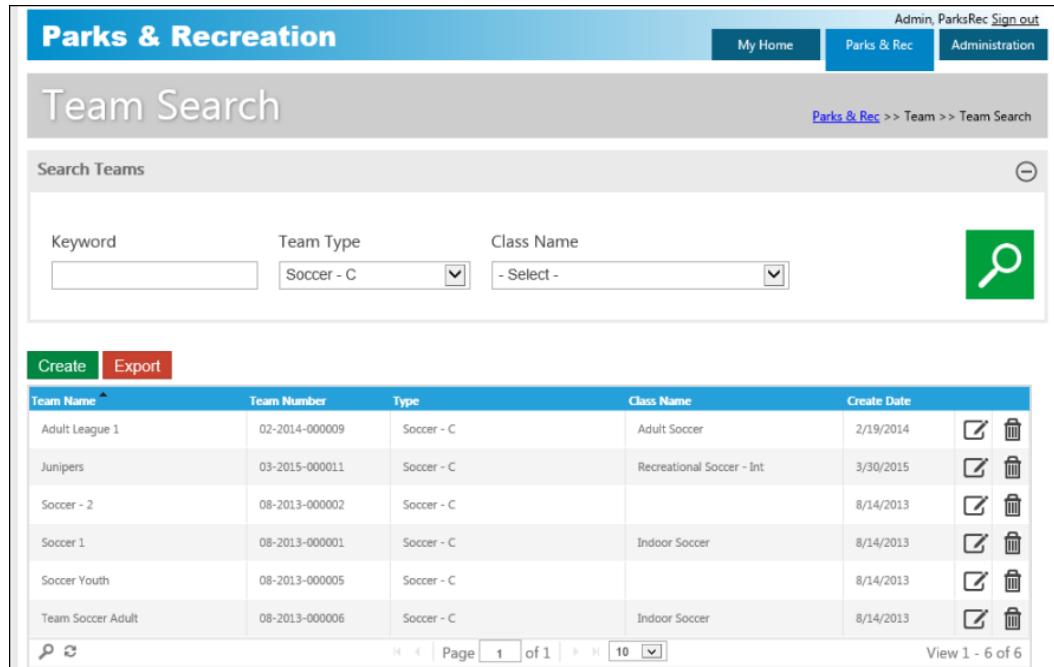
Report of Instructors
Application Report
File Name: InstructorReport.rdl

Run Report Run Report

Reports are created and maintained using Microsoft® SQL Server Reporting Services (SSRS).

Export

Where available, the Export option exports existing information to a comma-separated values (.csv) file. When you export the data, you can open the file or save it.



Parks & Recreation

Admin ParksRec Sign out

My Home Parks & Rec Administration

Team Search

Parks & Rec >> Team >> Team Search

Search Teams

Keyword Team Type Class Name

Soccer - C Select

Export

Team Name	Team Number	Type	Class Name	Create Date
Adult League 1	02-2014-000009	Soccer - C	Adult Soccer	2/19/2014
Junipers	03-2015-000011	Soccer - C	Recreational Soccer - Int	3/30/2015
Soccer - 2	08-2013-000002	Soccer - C		8/14/2013
Soccer 1	08-2013-000001	Soccer - C	Indoor Soccer	8/14/2013
Soccer Youth	08-2013-000005	Soccer - C		8/14/2013
Team Soccer Adult	08-2013-000006	Soccer - C	Indoor Soccer	8/14/2013

View 1 - 6 of 6

Import

Where available, the Import option imports existing information from a comma-separated values (.csv) file.

Parks & Recreation

Admin, ParksRec Sign out

My Home Parks & Rec Administration

Contact Import

Parks & Rec >> Contact >> Contact Import

Mass import of contact information can be performed using a comma delimited file. The following contact fields are supported (fields marked with * are required) in order:

- First Name*
- Last Name*
- Email
- Address 1
- Address 2
- City
- State
- Zip Code
- Gender
- Date of Birth
- Home Phone
- Work Phone
- Mobile Phone
- Alternative Phone
- Contact Preference

After you select the file to import, click **Preview** to view the records included in the file. To enable duplicate checking, which prevents creation of duplicate records, select the Enable Duplicate Checking check box and then specify the fields to use as duplicate cross-references.

Parks & Recreation

Admin, ParksRec Sign out

My Home Parks & Rec Administration

Contact Import

Parks & Rec >> Contact >> Contact Import

Mass import of contact information can be performed using a comma delimited file. The following contact fields are supported (fields marked with * are required) in order:

- First Name*
- Last Name*
- Email
- Address 1
- Address 2
- City
- State
- Zip Code
- Gender
- Date of Birth
- Home Phone
- Work Phone
- Mobile Phone
- Alternative Phone
- Contact Preference

First Name	Last Name	E-mail	Address 1	Address 2	City	State
Robert	Patterson	RobertDPatterson@cuvox.de	4642 Tavern Place		Wheeling	WV
Allen	Makin	AllenCMakin@teleworm.us	2605 Selah Way		Johnson	VT
Brian	Weaver	BrianSWeaver@gustr.com	1353 Bell Street		New York	NY
Becky	Gibson	BeckyGGibson@einrot.com	3059 Juniper Drive		Saint Charles	MI
Jon	Daniels	JonHDaniels@gustr.com	4561 Augusta Park		Belington	WV
David	Hayes	DavidCHayes@dayrep.com	3029 Shinn Street		New York	NY
Ronald	Rosenzweig	RonaldCRosenzweig@superrito.com	4400 Wayback Lane		Wantagh	NY
Cora	Burke	CoraABurke@cuvox.de	3239 Passaic Street		Washington	DC
Stephanie	Laplante	StephanieClaplante@rhyta.com	3385 Dog Hill Lane		Palco	KS
Raymond	Dugan	RaymondJDugan@superrito.com	3145 Tyler Avenue		Miami	FL

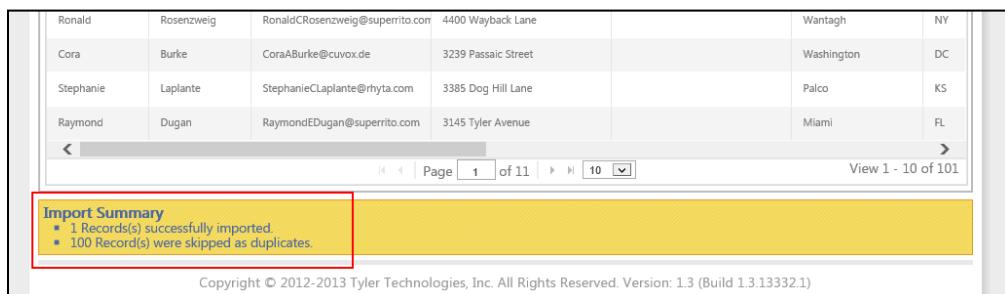
< > Page 1 of 10 View 1 - 10 of 100

Enable duplicate checking

<input type="checkbox"/> First Name	<input type="checkbox"/> City	<input type="checkbox"/> Home Phone
<input type="checkbox"/> Last Name	<input type="checkbox"/> State	<input type="checkbox"/> Work Phone
<input type="checkbox"/> Email	<input type="checkbox"/> Zip Code	<input type="checkbox"/> Mobile Phone
<input type="checkbox"/> Address 1	<input type="checkbox"/> Gender	<input type="checkbox"/> Alternative Phone
<input type="checkbox"/> Address 2	<input type="checkbox"/> Date of Birth	<input type="checkbox"/> Contact Preference

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Once you have imported a file, the program displays a message stating the number of records created and the number of records skipped as duplicates.



The screenshot shows a software application window with a table of data and a summary message. The table has columns for First Name, Last Name, Email, Street Address, City, State, and Zip. The summary message, highlighted with a red box, states: "Import Summary" with two bullet points: "1 Record(s) successfully imported." and "100 Record(s) were skipped as duplicates." The application interface includes a navigation bar with arrows, a page number (1 of 11), a record count (10), and a "View 1 - 10 of 101" button.

	First Name	Last Name	Email	Street Address	City	State	Zip
1	Ronald	Rosenzweig	RonaldCRosenzweig@superrito.com	4400 Wayback Lane		Wantagh	NY
2	Cora	Burke	CoraABurke@cuvox.de	3239 Passaic Street		Washington	DC
3	Stephanie	Laplante	StephanieCLaplante@rhyta.com	3385 Dog Hill Lane		Palco	KS
4	Raymond	Dugan	RaymondEDugan@superrito.com	3145 Tyler Avenue		Miami	FL

Import Summary

- 1 Record(s) successfully imported.
- 100 Record(s) were skipped as duplicates.

Page 1 of 11 | 10 | View 1 - 10 of 101

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My Home

The My Home tab is the active tab when you open the Administration pages. My Home provides a map that displays locations for currently scheduled activities, as well as direct links to Registration, Tasks, Calendar, and Reports pages. The Recent Registrations and Recent Rentals tabs display the most recent activity for these areas.

Parks & Recreation

Admin, ParksRec [Sign out](#)

Dashboard

[Home](#) [Recent Registrations](#) [Recent Rentals](#)

Registration

[Create Class Registration](#)
[Create Rental Registration](#)
[Join a Membership](#)
[Purchase Add on Item](#)

Tasks

[Create Contact](#)
[Create Class](#)
[Create Team](#)
[Create Rental](#)
[Create Membership](#)



Classes ending in the next 7 days:

Class Name	End Date
Coaching Clinic	06/11/2018

View 1 - 1 of 1

Calendar

[Master Calendar](#)

Reports

[View Reports](#)

Classes starting in the next 7 days:

Class Name	Start Date	Registered
No records.	Page 1 of 0	No records.

Note: To remove the map from the dashboard, select the Remove Heat Map check box in System Settings. (See the “System Settings” section of this guide.)

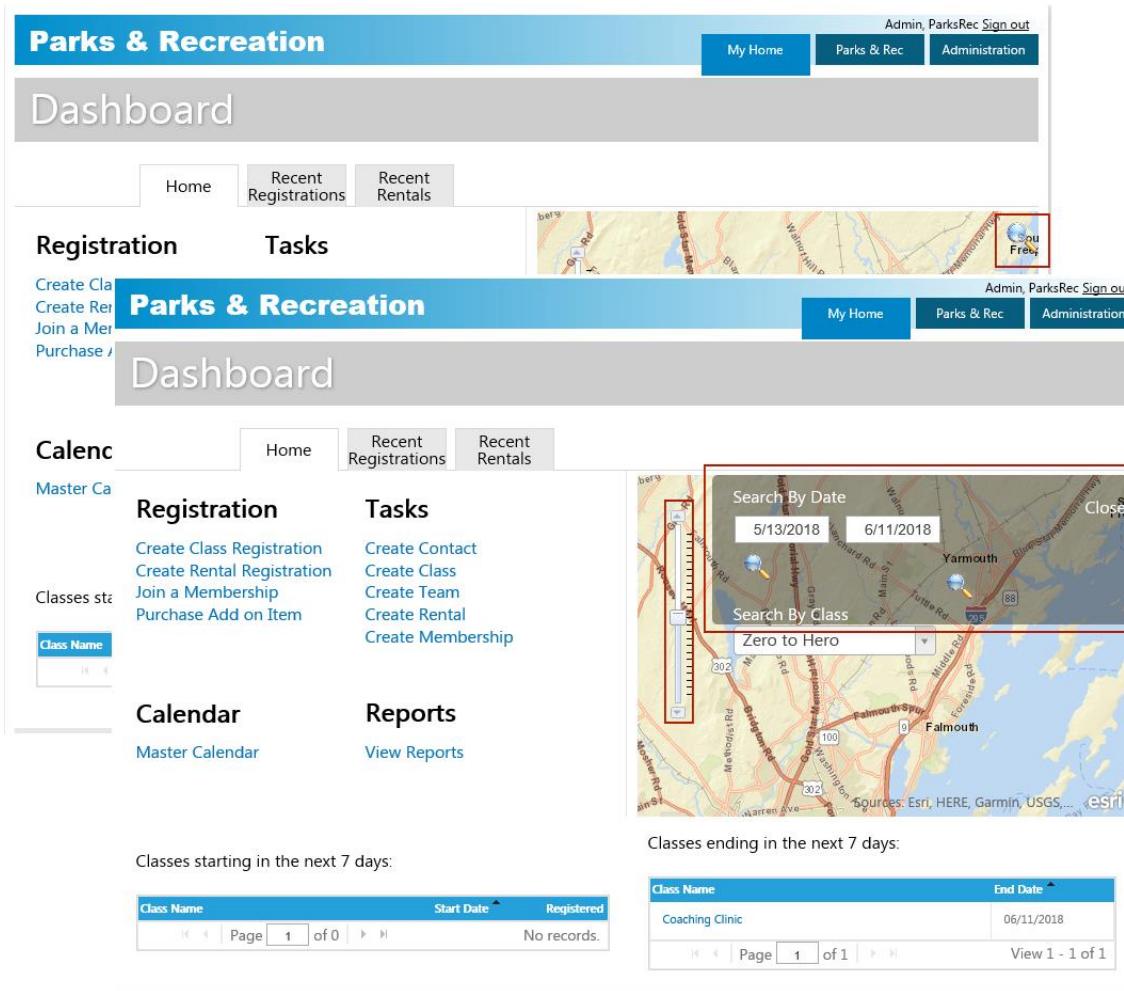
Home Tab

On the Home tab, the Create links in the Registration group open the Create pages for class, rental, and membership registrations. The links in the Task group provide direct access to the Create pages for adding contact, class, team, rental, or membership records.

The Master Calendar link in the Calendar group displays your organization’s Rental Activity calendar. Off hours for a selected facility are shaded in gray. In the Reports group, the View Reports link displays the My Reports page.

The Class Starting and Class Ending tables display lists of classes that begin and end within the next seven days; click a class name to display the Class Details page for that class.

On the activity map, when you click the **Search** button, the page refreshes to display the Search by Date and Search by Class options. The default value for the date range is the past 30 days.



The screenshot shows the Parks & Recreation dashboard with a map of the area. A red box highlights the search interface on the map. The search interface includes fields for 'Search By Date' (5/13/2018 to 6/11/2018) and 'Search By Class' (Zero to Hero). Below the map, there are two tables: 'Classes starting in the next 7 days' and 'Classes ending in the next 7 days'. The 'Classes starting in the next 7 days' table shows no records. The 'Classes ending in the next 7 days' table shows one entry: 'Coaching Clinic' ending on 06/11/2018.

Class Name	Start Date	Registered
		No records.

Class Name	End Date
Coaching Clinic	06/11/2018

When you use these options to define the date or class criteria and then click the **Search** button for either option, the page refreshes to display the class locations on the map.

Use the zoom slider to expand or restrict the map viewing area. The area of interest and the zoom scale settings are defined using the GIS Settings option on the Administration tab.

Recent Registrations and Recent Rental Tabs

The Recent Registrations and Recent Rental tabs display the recent activity for each category. The Recent Registrations tab displays the last 100 registrations sorted by descending registration dates; the Recent Rental tab displays the last 100 registrations sorted by descending registration dates. On either tab, click the Create Date header to reset the sort order or click the **Search** button in the footer to search for a specific item.

Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Dashboard

[Home](#) [Recent Registrations](#) [Recent Rentals](#)

Class Name	Name	Status	Create Date
Yoga I	Marian Martin	Paid in Full	03/26/2015 08:01:04 AM
Soccer Level 1	Harriett Jackson	Paid in Full	12/19/2014 02:06:05 PM
Indoor Fitness	Martin Smith	Paid in Full	10/15/2014 09:42:42 AM
Adult Soccer	Martin Smith	Paid in Full	10/13/2014 01:40:42 PM
Annual Membership	Martin Smith	Invoiced	10/13/2014 01:10:37 PM
Recreational Soccer - Int.	Kathleen Mullen	Invoiced	03/28/2014 11:36:50 AM
Skating			03/26/2014 12:28:19 PM
Skating			02/19/2014 02:32:28 PM
Oil Painting	Marcy Madison	Paid in Full	02/19/2014 02:22:00 PM
			01/06/2014 11:45:30 AM

Search...

Recreational Soccer - Int. [X](#)

Skating contains [Find](#)

[Reset](#)

[View 1 - 10 of 23](#)

When you click the Class or Rental Item name, the program displays the Details page for that class or item.

Parks & Rec

The Parks & Rec tab provides options for managing your community's activities, including creating class records, maintaining contact lists, managing rentals, and so on. Use the setup programs included on the Administration tab to create records required for Parks and Recreation processing.

Parks & Recreation
Admin, ParksRec [Sign out](#)

Parks & Rec

Contact

- [Search](#)
- [Create](#)
- [Report](#)
- [Import](#)

Class Registration

- [Create](#)
- [Pending](#)

Class

- [Search](#)
- [Create](#)
- [Report](#)

Rental Registration

- [Search](#)
- [Create](#)

Team

- [Search](#)
- [Create](#)
- [Report](#)

Add On Purchase

- [Search](#)
- [Create](#)

Location

- [Search](#)
- [Create](#)
- [Report](#)
- [Import](#)

Rental Item

- [Search](#)
- [Create](#)
- [Report](#)
- [Calendar](#)

Transaction

- [Search](#)
- [Report](#)
- [GL Export](#)
- [AP Export](#)
- [Collection Export](#)

Reimbursement

- [Search](#)
- [Report](#)
- [Export](#)

Invoice

- [Search](#)
- [AR Export](#)

Expense

- [Search](#)
- [Create](#)
- [Report](#)

My Reports

- [Report](#)

Memberships

- [Create](#)
- [Search](#)
- [Privileges](#)
- [Join](#)
- [Sign In](#)

Tyler Parks and Recreation 2018.3
20

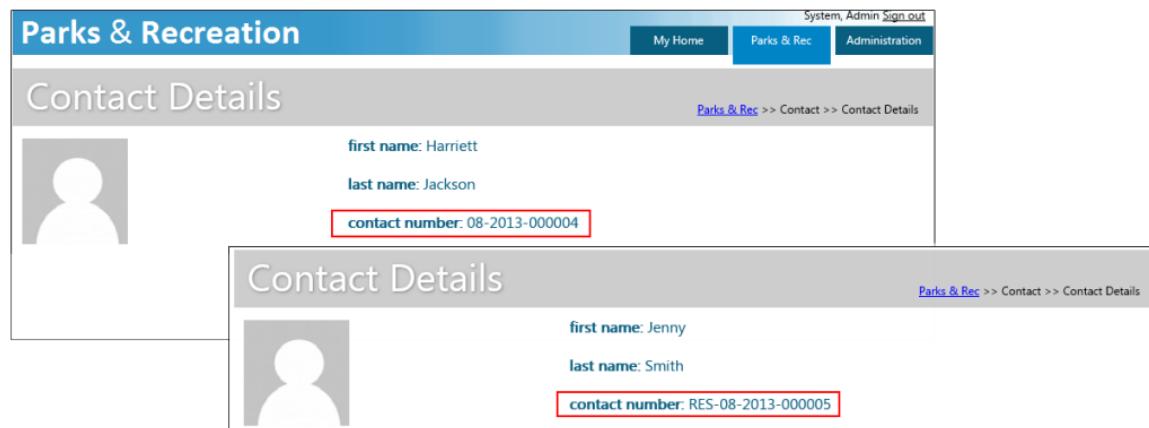
The following table provides a brief description for each category on the Parks & Rec tab. The available options depend on the settings defined on the Administration tab.

Category	Description
Contact	Defines contacts associated with the Parks and Recreation programs. Contacts can be participants, instructors, or staff.
Class	Manages the specific details for a class offering, including type, status, registration details, fees, available times, and so on.
Team	Defines teams of individuals who are related to an activity.
Location	Maintains location records by type and status. This category includes an option for importing location details using a .csv file.
Transaction	Identifies payment and refund records for transactions.
Invoice	Identifies invoices and creates export files.
My Reports	Creates reports of system activity. For a report to be available, you must complete the report setup on the Administration tab and the report must be created in Microsoft SQL Reporting Services.
Class Registration	Allows personnel within your organization to register participants for available activities. This option provides all the registration steps in order of completion.
Rental Registration	Allows personnel within your organization to complete rental transactions. This option provides all the registration steps in order of completion.
Add On Purchase	Manages the purchase process for add-on items outside the class or rental process.
Rental Item	Maintains records for rental item types and provides the status and location of the items.
Reimbursement	Creates an export file of fees or other charges that have been reimbursed.
Expense	Maintains expense records for activities.
Memberships	Provides a membership structure for activities, allowing you to provide services to contacts for set fees for defined time periods (for example, fitness program memberships offered for an annual fee).

Contact

Contacts are the individuals associated with the Parks & Recreation activities, including participants, instructors, and item or facility renters. When citizens register for activities using the portal, contact records are created. Within your organization, personnel can create contact records for instructors, participants, renters, or staff, and they can assign contact login access.

Contact records include a contact number, which is automatically assigned when the contact record is created. The number is comprised for the month, year, and an incremental participant number. If you have defined a prefix for recreation contacts using the Module Settings page of the Parks & Rec. Setup group on the Administration tab, this prefix is assigned to the contact number.



Parks & Recreation System, Admin Sign out

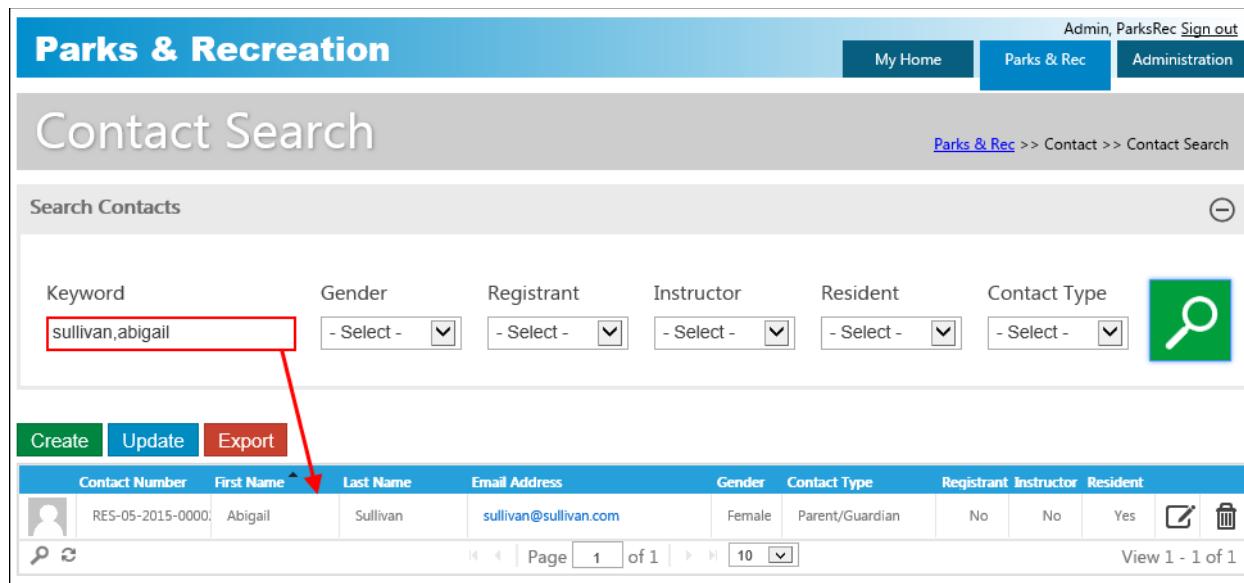
Contact Details [Parks & Rec >> Contact >> Contact Details](#)

Contact Details [Parks & Rec >> Contact >> Contact Details](#)

first name:	Harriett	first name:	Jenny
last name:	Jackson	last name:	Smith
contact number: 08-2013-000004		contact number: RES-08-2013-000005	

Contact Search

On the Contact Search page, you can search by [LastName, FirstName] in the Keyword field.



Parks & Recreation Admin, ParksRec Sign out

Contact Search [Parks & Rec >> Contact >> Contact Search](#)

Search Contacts

Keyword	Gender	Registrant	Instructor	Resident	Contact Type
sullivan,abigail	- Select -				

Create **Update** **Export**

Contact Number	First Name	Last Name	Email Address	Gender	Contact Type	Registrant	Instructor	Resident
RES-05-2015-0000	Abigail	Sullivan	sullivan@sullivan.com	Female	Parent/Guardian	No	No	Yes

View 1 - 1 of 1

Clicking the **Update** button for search results displays update options that can be applied to the set of records returned by the search process.

Contact Search

Parks & Rec >> Contact >> Contact Search

UPDATE ACTION CONTACT SELECT SUCCESS

Update Action

Grant Login

This will retrieve a list of contacts using the prior pages search criteria, if supplied, that have email addresses and do not currently have login privileges.

Increment Grade

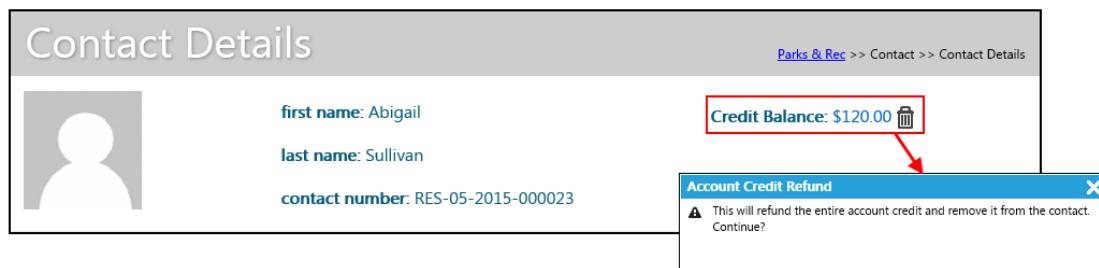
This will retrieve a list of contacts using the prior pages search criteria, if supplied, with a grade below 12th.

Cancel **Next >**

- **Grant Login**—Narrows your search results list to contacts for whom an email address is listed, but who have no login privileges. Select this option and click **Next**. Then, from the list displayed, select the contacts to give login privileges and click **Update**.
- **Increment Grade**—Narrows your search results list to contacts for whom a school grade of 12th grade or lower is listed. Select this option and click **Next**. Then, from the list displayed, select the contacts for which to update the school grade to the next grade and click **Update**.

Credit Refunds

If a contact has a credit balance for registration or rental activity, it displays at the top of the Contact Details page. To automatically refund the credit to the contact, click the **Delete** button.



Contact Details

Parks & Rec >> Contact >> Contact Details

first name: Abigail
last name: Sullivan
contact number: RES-05-2015-000023

Credit Balance: \$120.00 

Account Credit Refund

This will refund the entire account credit and remove it from the contact. Continue?



Contact Details

Parks & Rec >> Contact >> Contact Details

first name: Abigail
last name: Sullivan
contact number: RES-05-2015-000023

Credit Balance: \$0.00

Refund **Cancel**

When you confirm the refund, the page refreshes to display a \$0.00 balance. Click the balance to display the Account Balance Activity group, which includes the refund transaction.

Account Balance Activity			
Date	Transaction	Debit Amount	Credit Amount
8/12/2015	Indoor Soccer Refund	\$0.00	\$120.00
8/12/2015	Account Credit Refund	\$120.00	\$0.00
<input type="button" value=""/> <input type="button" value=""/> ◀◀ ▶▶ Page 1 of 1 ▶▶ 10 ▼ View 1 - 2 of 2			
<input type="button" value="OK"/>			

Contact Information

When you are adding or updating contact information, the Contact Info group of the Contact Details page provides the contact's personal information, the type of contact, the contact's preferred communication method, and the type of contact. Required fields are identified with an asterisk (*).

⊖
Contact Info

* Indicates required fields

Contact Preference* <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="Unspecified"/> ▼	Home Phone <input style="width: 100%; border: 1px solid #ccc; padding: 2px;" type="text" value="254-824-7442"/>
First Name* <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="Aaron"/>	Work Phone <input style="width: 100%; border: 1px solid #ccc; padding: 2px;" type="text"/>
Middle Name <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/>	Mobile Phone <input style="width: 100%; border: 1px solid #ccc; padding: 2px;" type="text"/>
Last Name* <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="Kurtz"/>	Alternative Phone <input style="width: 100%; border: 1px solid #ccc; padding: 2px;" type="text"/>
Gender <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="Male"/> ▼	Alternative Mobile Phone 1 <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/>
Contact Type <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="- Select -"/> ▼	Alternative Mobile Phone 2 <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/>
Date of Birth (mm/dd/yyyy)* <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="10/21/1982"/>	Email Address <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="emailaddress@email.com"/>
Age: 35	
<input type="checkbox"/> Employee	
<input type="checkbox"/> Resident	
<input type="checkbox"/> Override Resident Status	

If an employee discount is added to a class, rental or membership, any contact who has the Employee check box selected will be eligible for the discount. (For more on discounts, see the “Discount” section of this guide.)

The Date of Birth is not a required field. However, if you select the Registrant check box in the Registrant Info section, you must enter a date of birth. If you save the record without entering the date, the program displays a Missing Date message.

Contact Info

Date of birth is missing. ←

Contact Preference	Home Phone
Email ▼	<input type="text"/>

Resident requirements are verified according to the resident city or county entered in the System Settings program. When you create a contact record, the program verifies the value of the city or county; if the information entered matches the value of the Resident City or Resident County field in System Settings, the program identifies the contact as a resident.

If the contact is not identified as a resident, he or she is subject to nonresident fees and charges to participate in activities. To update the Resident check box, select the Override Resident Status check box, and then select the Resident check box.

If the contact is an employee, selecting the Employee check box establishes eligibility for employee discounts set up through the Administration page.

Address

The Address group provides essential address components for contacts. Use the Quick Search and Add field to complete the details for existing addresses.

Address

Quick Search and Add Start typing to search ... 123 T x

Address Line 1	City
<input type="text"/>	<input type="text"/>
Address Line 2	
<input type="text"/>	
Address Line 3	
<input type="text"/>	
Postal Code	
<input type="text"/>	

Address

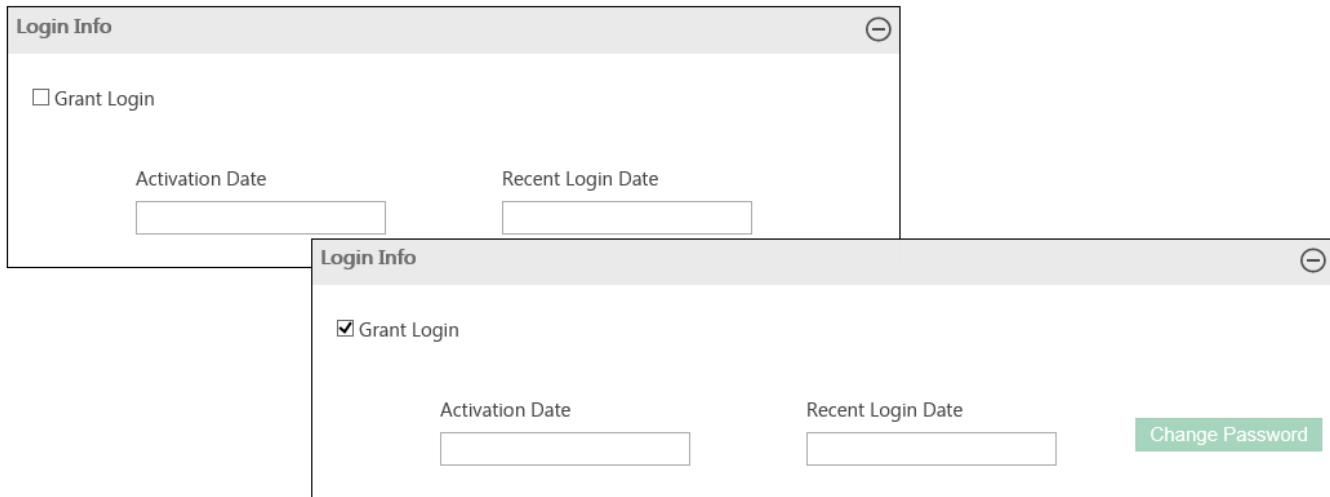
Quick Search and Add 123 Tyler Drive, Yarmouth, ME 04096

Address Line 1	City
<input type="text" value="123 Tyler Drive"/>	<input type="text" value="Yarmouth"/>
Address Line 2	State
<input type="text"/>	<input type="text" value="ME"/>
Address Line 3	County
<input type="text"/>	<input type="text"/>
Postal Code	Country Type
<input type="text" value="04096"/>	<input checked="checked" type="text" value="US"/>

For example, when you type “123 T” in the Quick Search and Add field, the program provides available options matching the data. Select the correct option and the program completes the individual data fields.

Login Info

Login Info grants login permission to users. When you select the Grant Login check box, the Change Password button is available. Click **Change Password** to send the user an email message containing a login password.

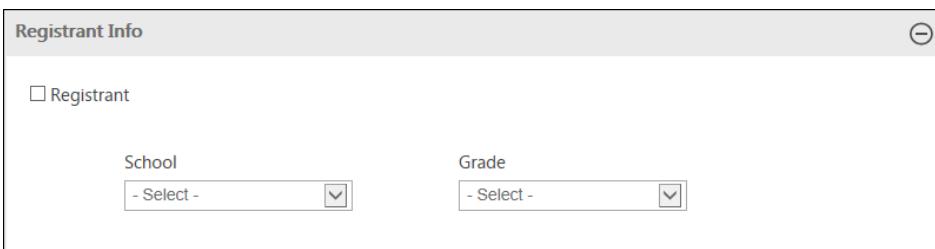


The Login Info fields must be complete for a contact to register for activities using the citizen portal.

Registrant Info

Registrant Info provides miscellaneous details for contacts. The Registrant check box must be selected for a contact to register for activities. However, instructors are not required to also be identified as registrants.

Available schools are maintained using the Schools option in the Parks & Rec Setup group on the Administration tab. Grade list options are system-coded options.



Instructor Info

For contacts who are instructors, the Instructor Info provides the instructor type, status, and the expense disbursement type. The list options available for selection are defined on the Administration tab.

Instructor Info

Instructor

Instructor Type	Start Date
Music Theory	08/02/2013
Instructor Status	
Active	
Expense Disbursement	
General Expense	

If the value of the Instructor Status list is Inactive, the page refreshes to include the End Date field. For the inactive status, you must enter a start and end date.

Vendor

For contacts who are vendors, you can add a vendor number and remittance number to a contact record. You can also edit this information after it has been added.

Vendor

Vendor Number	Remit Number
23	0

Bank Account

The Bank Account section stores the bank name, account type (checking or savings), and the account number. Available bank names are established on the Administration tab's Cashier Setup pages.

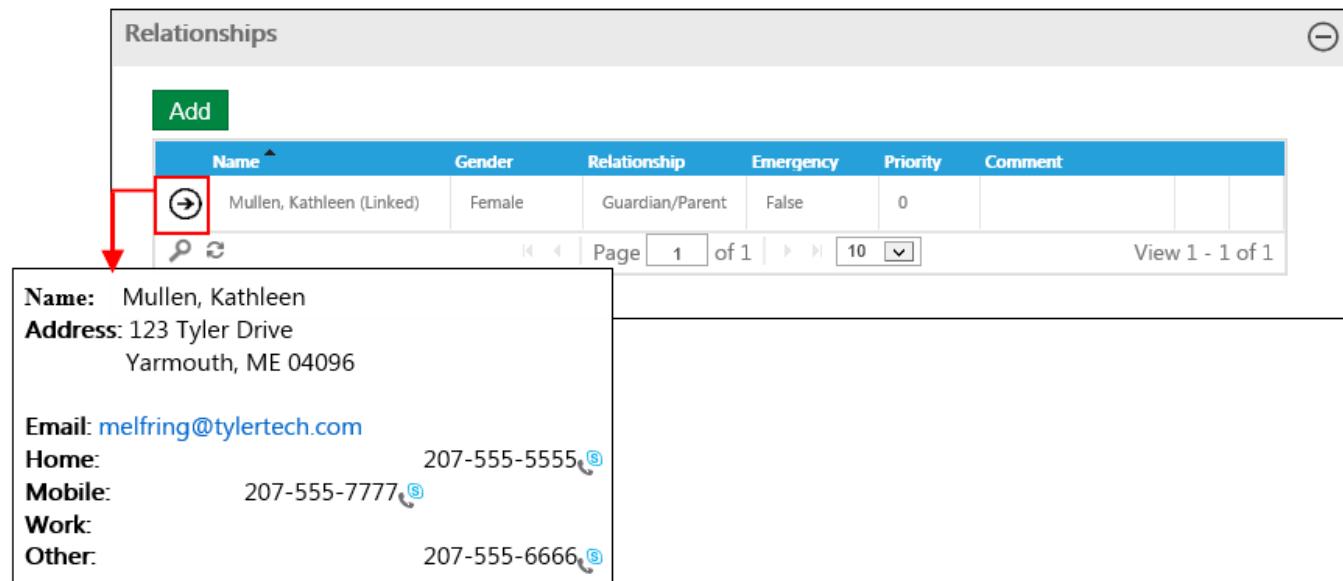
Selecting the Pre-Approved check box indicates that this contact is approved to make payments by ACH, and invoice payments from this contact are included in the ACH files generated. If you change any of the other bank account information for this contact, the program automatically clears the pre-Approved check box.

Bank Account

Bank	Account Number
- Select -	
Account Type	<input checked="" type="checkbox"/> Pre-approved
- Select -	

Relationships

Relationships defines connections between contacts, for example, between a parent or guardian and a participant.



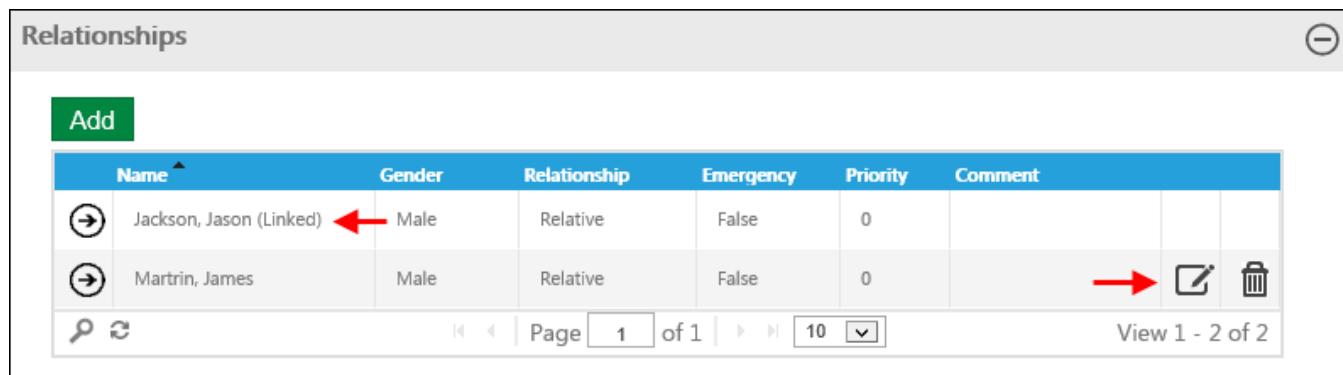
The screenshot shows a 'Relationships' list view with a single record. The record for 'Mullen, Kathleen' is highlighted with a red box around the 'Edit' and 'Delete' buttons. A red arrow points from the 'Edit' button to a detailed view box below. The detailed view box contains contact information: Name (Mullen, Kathleen), Address (123 Tyler Drive, Yarmouth, ME 04096), Email (melfring@tylertech.com), Home phone (207-555-5555), Mobile phone (207-555-7777), Work phone (207-555-6666), and Other phone (207-555-6666). The 'Edit' and 'Delete' buttons are also visible in the detailed view box.

Name	Gender	Relationship	Emergency	Priority	Comment
Mullen, Kathleen (Linked)	Female	Guardian/Parent	False	0	

Name: Mullen, Kathleen
Address: 123 Tyler Drive
 Yarmouth, ME 04096
Email: melfring@tylertech.com
Home: 207-555-5555
Mobile: 207-555-7777
Work:
Other: 207-555-6666

For existing relationships, click the details button to display contact information.

When relationship contacts are linked to the contact, you cannot edit or delete the information. When the contacts are not linked, the edit and delete buttons are available.

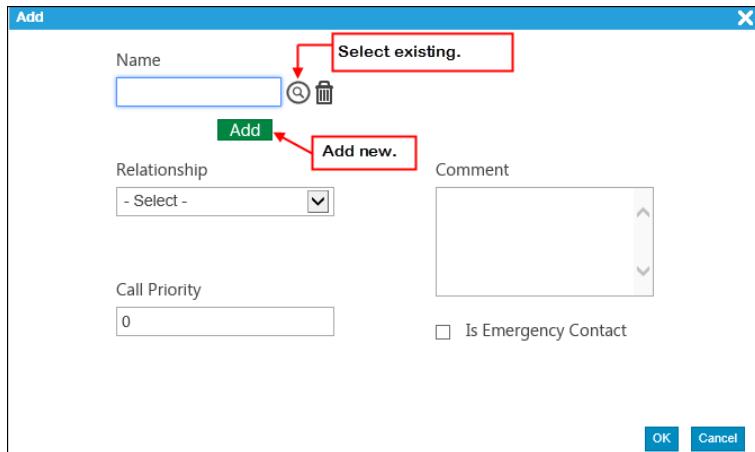


The screenshot shows a 'Relationships' list view with two records. The first record for 'Jackson, Jason' is linked (indicated by a red arrow pointing to the 'Edit' and 'Delete' buttons) and has an 'Edit' button. The second record for 'Martrin, James' is not linked (indicated by a red arrow pointing to the 'Edit' and 'Delete' buttons) and has both an 'Edit' and a 'Delete' button. A red arrow points from the 'Edit' button to a detailed view box below. The detailed view box contains contact information: Name (Martrin, James), Gender (Male), Relationship (Relative), Emergency (False), Priority (0), and Comment (empty). The 'Edit' and 'Delete' buttons are also visible in the detailed view box.

Name	Gender	Relationship	Emergency	Priority	Comment
Jackson, Jason (Linked)	Male	Relative	False	0	
Martrin, James	Male	Relative	False	0	

Name: Jackson, Jason (Linked)
Martrin, James
Gender: Male
Relationship: Relative
Emergency: False
Priority: 0
Comment:

To add a new relationship, click **Add** in the Relationships group to display the Add dialog box. Click the search button to select an existing contact for the relationship or click **Add** to add a new contact record.



When you click **Add**, the Name field includes auto populate functionality. When you type the first few letters of a name, the program provides a list of existing options that match the text entered. The more text you enter, the narrower the list of possible selections. When the list of options provides a matching value, you can stop entering text and click the value to complete the field.

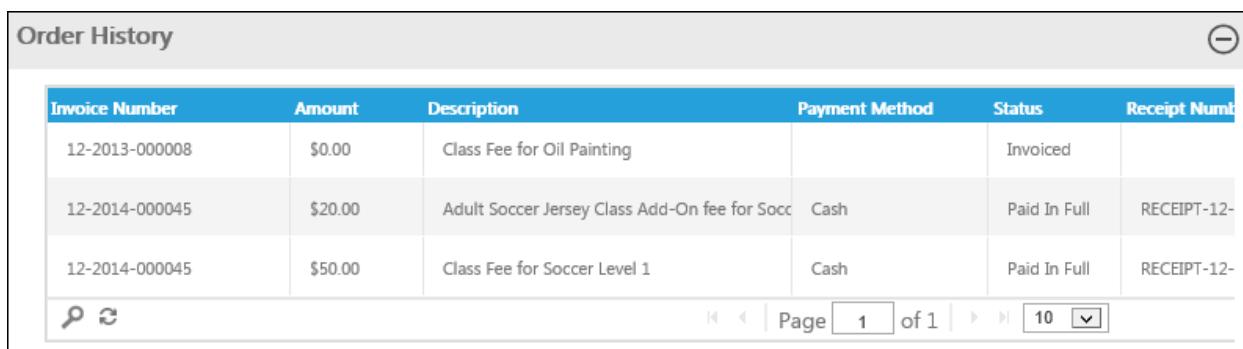
For relationship contacts, the program provides the Billing Address, Relationship, and Confirm screens. Complete the fields, as required, to complete the record.

When you add a new relationship contact, the Same as Parent/Guardian check box is available on the Billing Address screen. When you select this check box, the program completes the contact and preferences information for the new record with the parent/guardian record values.

When you complete the relationship contact add process, the program returns you to the Contacts Detail page. The Relationships group displays the contacts and the relationship type.

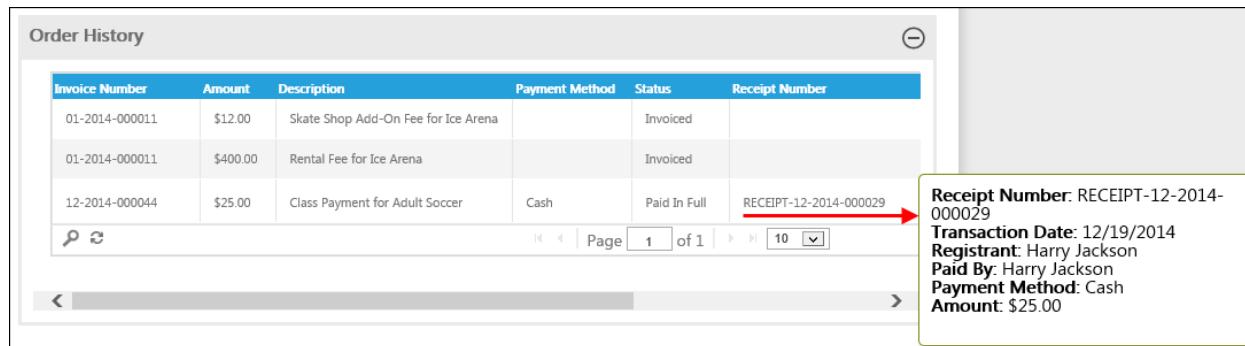
Order History

Order History provides a history of class registrations or items that a contact has purchased from your organization. The Status field identifies invoiced registrations; the Payment Method is blank for the invoiced records. For paid items, the Receipt Number field provides the receipt number for the transaction. Use the email or print buttons to send or print a copy of the receipt.



Invoice Number	Amount	Description	Payment Method	Status	Receipt Numbr
12-2013-000008	\$0.00	Class Fee for Oil Painting		Invoiced	
12-2014-000045	\$20.00	Adult Soccer Jersey Class Add-On fee for Socce	Cash	Paid In Full	RECEIPT-12-
12-2014-000045	\$50.00	Class Fee for Soccer Level 1	Cash	Paid In Full	RECEIPT-12-

When you hover your pointer over a receipt number, it provides details for that payment.



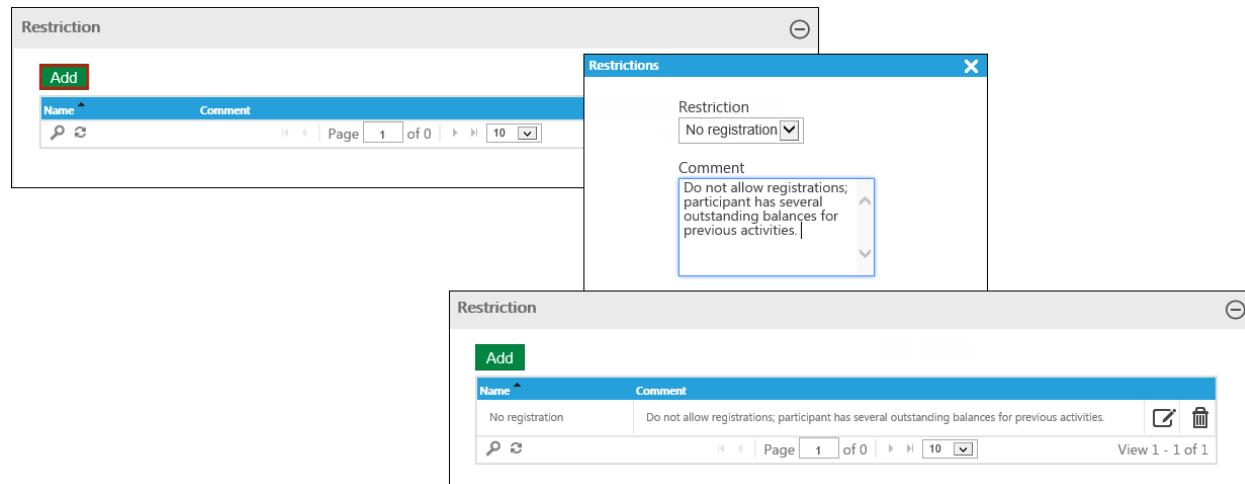
The screenshot shows a table titled 'Order History' with columns: Invoice Number, Amount, Description, Payment Method, Status, and Receipt Number. The Receipt Number column contains the value 'RECEIPT-12-2014-000029'. A red arrow points from this cell to a tooltip box. The tooltip box contains the following information:

Receipt Number: RECEIPT-12-2014-000029
Transaction Date: 12/19/2014
Registrant: Harry Jackson
Paid By: Harry Jackson
Payment Method: Cash
Amount: \$25.00

Restriction

The Restriction group assigns restrictions to contacts. For example, you can restrict a registrant from using a specific payment method, or you can prevent a registrant from registering for a class or renting a facility.

When you click **Add**, the Restrictions box displays. Select the applicable restriction and then add comments, if appropriate, specific to the restriction for this particular contact. When you save the restriction, the Restriction group displays the restriction description and comment.



The screenshot shows three windows related to restrictions:

- Restriction Add Page:** Shows a table with columns 'Name' and 'Comment'. A modal window is open over this table.
- Restrictions Modal:** Shows a list of restrictions. The first item is 'No registration' with a dropdown menu. The 'Comment' section contains the text: 'Do not allow registrations; participant has several outstanding balances for previous activities.'
- Restriction List Page:** Shows a table with columns 'Name' and 'Comment'. The first row shows 'No registration' with a comment: 'Do not allow registrations; participant has several outstanding balances for previous activities.' There are checkboxes and a trash can icon in the last column.

When you attempt to register this contact for a class using the Class Registration process, the program prevents the registration and displays the restriction comment. In this case, the Cancel option is the only option available.

Summary

Soccer 2015-Jul-001

Total: \$150.00

Add new dependent

Registrant: Martrin, James | Me | Age:23

Fee: \$150

Start Date: 7/20/2015

End Date: 10/19/2015

Monday: 6:00 PM - 8:00 PM
Wednesday: 6:00 PM - 8:00 PM

Location: Park Pond Park

Age Range: 18 - 100

Gender: Coed

Capacity: 10 - 30

Registrant is restricted from registering for classes:
Do not allow registrations; participant has several outstanding balances for previous activities.

class add-ons

The selected item does not have any Add-Ons

This is an adult soccer class designed to teach the basics of soccer.

If the contact attempts to register using the citizen portal, he or she encounters the same results.

Qualified Discounts

The Qualified Discounts group contains discounts for which the contact is eligible.

Qualified Discounts

Enabled	Name	Description	Type	Amount/Percent
<input type="checkbox"/>	Middle Age	Middle Age	Age	\$3.00
<input type="checkbox"/>	Boy Scouts	Boy Scouts	Custom	5.00 %
<input type="checkbox"/>	AAA	AAA Membership	Custom	5.00 %

Page 1 of 1 10 View 1 - 3 of 9

Check boxes appear next to the custom discounts available to the employee. To make the employee eligible for a custom discount, select the corresponding check box. Any discount added to a class, rental or membership makes the employee eligible for the discount.

Discounts are set up on the Discount page in Administration. (See the “Discount” section of this guide.)

Class

The Class option manages the specific details for a class offering, including type, status, registration details, fees, available times, and so on. Click the column headers to sort the class results.

In the search results table, hover your pointer over the class number to view the class dates, registration dates, and class times.

Parks & Recreation Admin, ParksRec Sign out

Class Search Parks & Rec >> Class >> Class Search

Search Classes (x)

Keyword	Location	Class Type	Category							
<input type="text"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>							
Status	Gender	Age	Instructor							
<input type="button" value="Active"/>	<input type="button" value="- Select -"/>	<input type="text" value="0"/>	<input type="button" value="- Select -"/>							
Start Date From	Start Date To	End Date From	End Date To							
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>							
<input type="checkbox"/> Members Only <input type="checkbox"/> Residents Only										
<input type="button" value="Create"/> <input type="button" value="Export"/>										
Class Number	Class Name	Start Date	End Date	Class Location	Class Type	Class Status	Register	Max #		
05-2017-000042	Number: 05-2017-000042 Name: Intermediate Yoga Dates: 6/23/2017 - 8/11/2017 Registration Dates: 5/4/2017 - 6/16/2017 Instructor: Jones, Kate Friday: 7:00 PM - 8:00 PM		2017	Bartlett School	Classroom	Active	1	10		
05-2017-000033			2017	Bartlett School	Athletic - Indoor	Active	3	20		
2017-01-001			2017	Bartlett School	General Enrichment	Active	2	10		
2016-10-002			2017	Bartlett School	Health and Fitness	Active	0	0		
2016-10-003			2017	Bartlett School	Athletic - Indoor	Active	0	15		
2016-10-001	Yoga I	10/17/2016	12/23/2016	Bartlett School	Health and Fitness	Active	0	0		

For each class record, the edit and delete buttons are available. Clicking the edit button displays the Class Details page. You cannot delete a class record for which there are active registrants.

Class Details

The Class Details page provides the class number, name, status, activity, fee and registration details. The details are organized in groups, which you can expand or collapse for viewing.

Parks & Recreation

[Admin, ParksRec Sign out](#)
[My Home](#)
[Parks & Rec](#)
[Administration](#)

Class Details

[Parks & Rec >> Class >> Class Details](#)
Name: Summer Camp Week 4

Registrants: 0

Class Number: 02-2016-000363

Waitlist: 1

(

(

(

(

(

- Collapse All -
Search

General

Setup

* Indicates required fields
(

Class Name*

Start Date*

Class Type*

End Date*

Category*

Fee Template

Status*

Fee Name

(
)

Group

Registration Start*

Gender*

Registration Deadline*

Location*

Payment Deadline

Registration Custom Layout

Fee*

Setup

The Setup fields assign a class number, define the class times and fees, specify age requirements, and store the description that is available on the citizen portal. Required fields are identified with an asterisk (*).

Setup

(

* Indicates required fields
(

Class Name*

Start Date*

Class Type*

End Date*

Category*

Fee Template

Status*

Fee Name

(
)

<input type="checkbox"/> Is Special Event <input checked="" type="checkbox"/> Show on Portal <input type="checkbox"/> Restrict to Residents Only <input type="checkbox"/> Restrict to Members Only <input type="button" value="Select Membership(s)"/> <input type="button" value="▼"/> <input type="checkbox"/> Allow Multiple Registrations <input type="checkbox"/> Restrict to View Only on Portal <input type="checkbox"/> Check Specific Boundaries (Add service to System Settings) <input checked="" type="checkbox"/> Auto Add Waitlist Contacts	Maximum Age* <input type="text" value="99"/> Age Calculation Date* <input type="text" value="2/12/2016"/> Minimum # of Registrants* <input type="text" value="1"/> Maximum # of Registrants* <input type="text" value="100"/> Minimum School Grade <input type="button" value="- Select -"/> <input type="button" value="▼"/> Maximum School Grade <input type="button" value="- Select -"/> <input type="button" value="▼"/> <input type="checkbox"/> Allow waitlist to remain open <input type="checkbox"/> Allow admin to over-enroll class
Description <div style="border: 1px solid #ccc; padding: 5px; height: 150px;">  </div>	

Before creating a class, use the Park & Rec. Setup options on the Administration tab to create class type, category, status, group, and location records.

If this class is available to residents and nonresidents, you must enter a fee in the Fee and Nonresident Fee boxes.

In addition to general class information, the Class Details page provides options for determining registrant requirements and assigning miscellaneous administrative settings.

Field	Description
Registration Custom Layout	Determines the layout template to use during registration. Only those templates for which the Show for Registration check box is selected are available. Use the Custom Fields and Custom Fields Layout options on the Administration tab to maintain customized fields.
Registration Disclaimer	Assigns a disclaimer to the registration process for the class. For example, your organization may have a participation policy that must be acknowledged during the registration process.

Field	Description
Include Disclaimer on Receipt	If selected, includes the selected disclaimer text on registration receipts. The disclaimer notices set up for your organization are available in the Registration Disclaimer list.
Is Special Event	If selected, this check box, along with an uploaded image, causes your organization's citizen portal to include this class in scrolling views. See Display Class Images on the Citizen Portal for more details.
Show on Portal	If selected, makes this class available on your citizen portal.
Restrict to Residents Only	If selected, excludes nonresidents from class registration.
Restrict to Members Only	If selected, displays a notation on the Class Details and citizen portal indicating that the class is only available to registrants with an active membership. As with resident-only classes, member-only classes are not enforced during registrations processed from the Administration page. Use the Select Memberships list to identify the types of memberships required to register for the activity.
Allow Multiple Registrations	If selected, allows a registrant to register multiple times for this class, whether registering through administration or the portal.
Restrict to View Only on Portal	If selected, prevents your organization's citizen portal from displaying the class in the list of classes available for registration. In this case, when a user views the class description, the Add to Cart option is not available.
Check Specific Boundaries (Add Service to System Settings)	If selected, enforces registration restrictions according to the specific boundaries defined in the Class Residence Verification Services field in System Settings. This setting works with the residency settings to determine a registrant's eligibility for the class.
Auto Add Waitlist Contacts	Overrides the global Auto Add Waitlist Contacts as Registrants setting in the Class Settings section of System Settings. When a class is created, this check box inherits the global setting. If the auto waitlist setting is turned on for a class and the class capacity increases, waitlist contacts will be added to the class based on the number of seats available.
Fee Template	Assigns to the class a fee from a template set up in Administration. Select from the available templates on the drop-down. If the Class Type has a default fee template, this selection overrides it. Once a registrant is added to the class, the field becomes read only. You may not select both a Fee Template and a Fee Name.
Fee Name	Assigns to the class a fee set up in Administration. Click the magnifying glass to select from a list of active fees. If the Class Type has a default fee, this selection overrides it. Once a registrant is added to the class, the field becomes read only. You may not select both a Fee Name and a Fee Template.

Field	Description
Age Calculation Date	Provides the date at which to validate a registrant's age. When you create a new class or update existing classes, the default value for this field is the class start date. When the value of the Class Start Date field is changed, the Age Calculation Date field is automatically changed to the updated class start date.
Minimum/Maximum # of Registrants	Define the class size. Once the maximum number of participants is reached, registrants are moved to a waitlist for the activity.
Minimum/Maximum School Grade	Restrict class availability according to a student's grade level, that is, only students who meet the minimum school grade level can register. Contacts who do not have a specified grade level are allowed to register along with contacts whose grade level meets the minimum.
Allow Waitlist to Remain Open	If selected, causes the waitlist to remain open past the end of the registration period.
Allow Admin to Overenroll Class	If selected, makes the Overenroll button available along with the Waitlist button on the Class Details screen. Using Overenroll allows you to add participants over the maximum number specified without using the waitlist feature.
Description	<p>Stores the class description that displays on the citizen portal. This description should be brief, but designed to serve as a short advertisement for the class.</p> <p>The available formatting options for the description text allow you to set font type and size, add highlighting, and so on. When the text displays on the citizen portal, the formatting effects display.</p>
Registration Receipt Note	<p>Provides notes that are included on the receipt that displays in the citizen portal after registration, on the receipt that is emailed to the registrant after registration, or on an email receipt reprint. The notes display in each class registrant section of the receipt. If multiple class registrations include notes, the notes display with the details for each class on the receipt. If you modify the receipt note text after receipts are initially printed, any reprinted receipts contain the original receipt note.</p> <p>The available formatting options for the receipt note text allow you to set font type and size, add highlighting, and so on. When the text displays on the citizen portal, the formatting effects display.</p>

Membership Classes

If your organization offers memberships and you have defined membership class types, when you are creating class records and you select a class type that indicates a membership, the Select Memberships list is available. Use this field to assign one or more membership periods to the class. Membership periods are defined using the Membership Period option in the Parks & Rec. Setup group.

Select Membership(s)	
<input type="checkbox"/>	[Select all]
<input type="checkbox"/>	Annual Membership
<input type="checkbox"/>	Individual Membership

If you register the same individual for the same membership more than one time, the membership is renewed or extended accordingly. When you complete a family membership registration, all related contacts that share the exact same street address are added to the members. These members are not included on the registrant list; only the payer contact displays here. However, a special condition type 1 is created, which identifies the associated family members.

Once you have created a membership class and have registered individuals for that class, their contact records identify them as members. Members are eligible to participate in all classes, but only members can participant in classes that are restricted to members only.

Registration Period Exceptions (Optional)

When you are creating a class, the Registration Period Exceptions group provides the option for defining early and late registration periods and for assigning fee adjustments for these periods.

Registration Period Exceptions (optional)					
Period	Start Date	End Date	Fee Adjustment	Resident Fee	Non-Resident Fee
Early Registration	1/30/2018 12:00 AM				
Late Registration		2/16/2018 12:00 AM			

The early and late registration periods must fall within the defined registration period:

- The time period from the Registration Start Date through the Early Registration End Date is the early registration period and this period will have the early fee adjustment assessed.
- The time period from the Early Registration End Date through the Late Registration Start Date is the standard registration period and will use the standard class fees.
- The time period from the Late Registration Start Date through the Registration Deadline is the late registration period and will have the late fee adjustment assessed.

When an early or late period is specified, a fee adjustment must be added. A class can have any variation of an early or late registration period, but neither is required.

Registrants

For existing classes, the Registrants group provides a list of participants for the selected class. The Status field provides payment status, the Group field identifies the registrant's assigned

class group, if applicable, and the Notes field provides additional information provided for the registrant.

Registrants						(-)
<input type="button" value="Export"/>						
First Name	Last Name	Status	Group	Create Date ▾	Notes	
Jack	Jones	Paid in Full		06/24/2016 11:45:08 AM		   
Harry	Jackson	Pending Payment		06/24/2016 11:41:46 AM		   

If a registrant has made a partial payment, the entry for the registrant contains two rows: one for the partial payment and one for the total invoice.

When you hover your pointer over the Edit button for an individual registrant, the program displays receipt details, registrant attachments, notes, and custom fields.

Click **Add** to pay an invoice or purchase an add-on item. When you complete a transaction from this page, the program does not create a new invoice unless the total value of the invoice changes (for example, you add or remove an add-on item or you change your residency status). If the total does not change, the program uses the existing invoice. If you remove a registration, the invoice is deleted.

If you click **Add** to pay the invoice for a registrant who has made a partial payment, only the invoiced amount displays.

When you click **Save** to close the Summary page, the program displays the Pay details dialog box.

Summary

First Name	Fee
Patrick	50.00
Last Name	Registrant Total
Smith	17.00
Group	Notes

Add On

Add On	Fee	Number	Suppl. Name	Supple. Value	Buy
Adult Soccer Jersey	15	1			<input checked="" type="checkbox"/>
Adult Soccer Jersey	15	1			<input checked="" type="checkbox"/>

Pay

invoice number: 02-2014-000018

name: Smith, Patrick total fee: 2.60

Fee Amount Due

General Participation Fee	2.00
Adult Soccer Jersey	0.60

Pay In Full Pay By

Full Split Smith, Patrick | Me

Payment Method

Cash

Save Cancel

If you complete the payment process, the Status field indicates the change.

Registrants				
Export				
First Name	Last Name	Status	Group	Notes
Harriett	Jackson	Paid in Full		
<input style="background-color: red; color: white; border: none;" type="button" value="Export"/>				+ ✎ trash print envelope
<input style="border: none;" type="button" value="Search"/>	<input style="border: none;" type="button" value="Print"/>	Page	1 of 1	10
<input style="border: none;" type="button" value="Print"/>	<input style="border: none;" type="button" value="Email"/>	View 1 - 1 of 1		

Click **Delete** to remove the registrant from the class and refund payments, if appropriate.

Class Refund Fees

Please enter refund amounts by fee, not to exceed fee amount paid, and either select to apply refund to an account credit, create a refund check, transfer registration to another class or void. Please also confirm whether to cancel or retain the existing class registration. If selecting **Void**, the transaction will be reversed using the fee amounts paid and the registration will be canceled.

Fee Name	Fee Amount Paid	Fee Amount Refunded
Adult Soccer Jersey	20.00	20.00
General Participation Fee	50.00	50.00

Comments

Cancel Recreational Soccer - Int Registration?

Void **Transfer** **Refund Check** **Account Credit** **Cancel**

Using the Class Refund Fees dialog box, you can void the transaction, which reverses fee amounts paid and cancels the registration, transfer the registration to a different class, process a refund check, or apply the refund to the participant's account as a credit.

When you hover your pointer over the Status field for a registration that is paid in full, the payment receipt details are provided.

Registrants				
First Name	Last Name	Status	Group	Notes
Harriett	Jackson	Invoiced		     
Marcy	Madison	Paid in Full		     
Marcy	Madison	Refunded		     
Marcy	Madison	Refunded		     
Kathleen	Mullen	Pending Payment		     
Peter	Peterson	Pending Payment		     

Receipt Number: RECEIPT-01-2014-000008
 Transaction Date: 01/06/2014
 Registrant: Marcy Madison
 Paid By: Marcy Madison
 Payment Method: Cash
 Amount: \$3.00

      Page 1 of 1   10  View 1 - 6 of 6

Teams

Teams provides the name of the teams participating in a class or activity. The Teams pane replaces the Registrants pane for those classes defined with the Teams class type. In this case, a single registrant (designated as the captain) registers the team, not the individuals on the team. The Teams pane provides the Team and Captain Name fields.

Teams

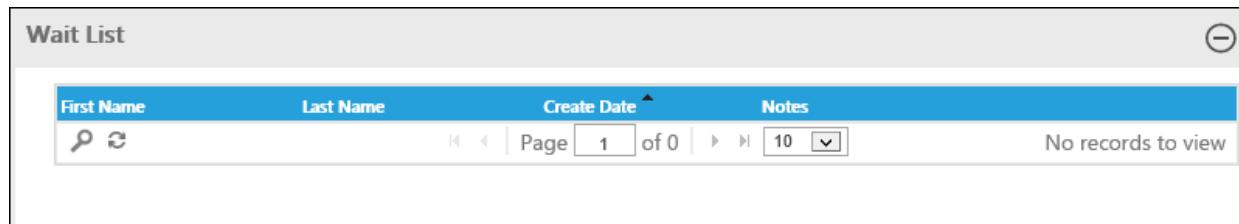
Export

Team Name	Cpt. First Name	Cpt. Last Name	Status	Create Date	Notes
 				 Page 1 of 0   10 	No records to view

Use the Export option to create an Excel spreadsheet of the teams registered for the selected class or activity.

Wait List

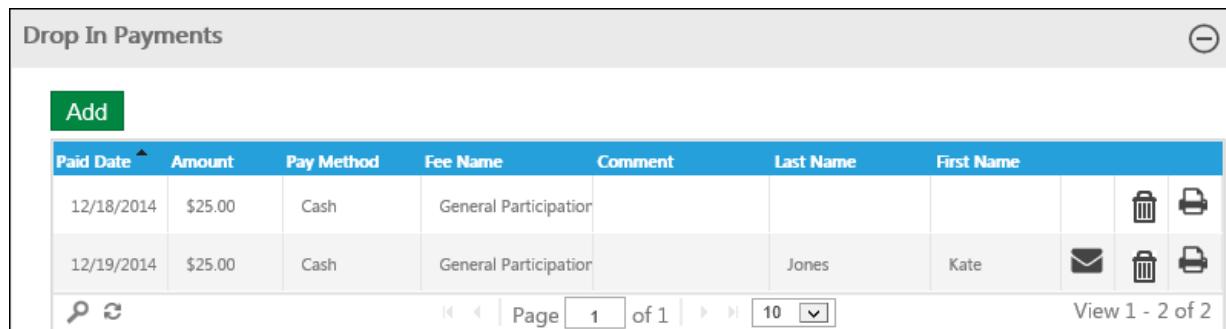
Wait List provides a list of registrants who are not officially registered for the class due to space availability, but who wish to be registered should the availability change.



As space becomes available, use the Wait List group to move contacts to the class registration list. When you do so, the program provides the payment options.

Drop In Payments

Drop In Payments provides the option for accepting payment directly from the Class page.



Paid Date	Amount	Pay Method	Fee Name	Comment	Last Name	First Name	Print	Email
12/18/2014	\$25.00	Cash	General Participation					
12/19/2014	\$25.00	Cash	General Participation		Jones	Kate		

Once payment is accepted and the record is saved, the print and email options are available for receipt printing or delivery. Printed receipts do not require that the Payer value be entered when you complete the payment details; however, the email option is only available when the payer is identified.

To enter an add-on payment, click **Add**. In the Class Payment dialog box, select the fee name and payment method, and then enter the amount, payer, and paid date values. You can optionally identify the payer or add comments.

Class Payments

Fee Name*	Payer Name
- Select Fee -	<input type="text"/>  
Payment Method*	Paid Date*
- Select Pay Method -	<input type="text"/>
Amount*	Comment
<input type="text"/>	<input type="text"/>
<small>*Required</small>	
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

The Payer Name field includes autocomplete functionality. When you type the first few letters of a name, the program provides a list of existing options that match the text entered. The more text you enter, the narrower the list of possible selections. When the list of options provides a matching value, you can stop entering text and click the value to complete the field.

Drop-in transactions are automatically saved. You do not need to save the entire class record for these transactions.

The history of these payments is included in the Class Details record. Additionally, a transaction is added for the payment and is available using the Transaction Search option.

The Delete button for a drop-in payment provides the option for refunding the payment. When you click **Delete**, the program displays the Payment Refund dialog box, which indicates the drop-in amount. Accept the default value, or enter a new value not to exceed the total payment amount. Click **Refund** to complete the process and save the refund record. Click **Void** to reverse the payment amount and cancel the transaction.

Payment Refund

Please enter refund amount, not to exceed fee amount paid, and click refund or void. If selecting **Void**, the transaction will be reversed using the fee amounts paid.

Fee Amount Paid	Fee Amount Refunded
25.00	25.00

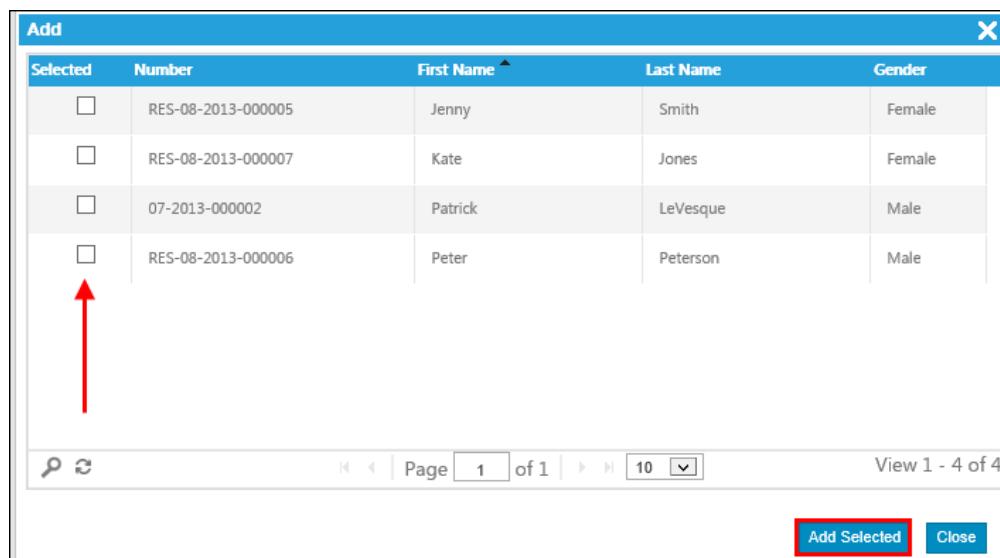
Comments

If you select Void, the program displays a confirmation message confirming the void of the entire transaction. If you continue, the action voids the entire transaction and removes all registrations associated with that transaction.

Instructors

The Instructors section identifies the instructors who are associated with the class. Instructors must have active contact records.

Click **Add** to assign an instructor to a class. From the list of available instructors, select the check box for the instructor or instructors to add, and then click **Add Selected**.



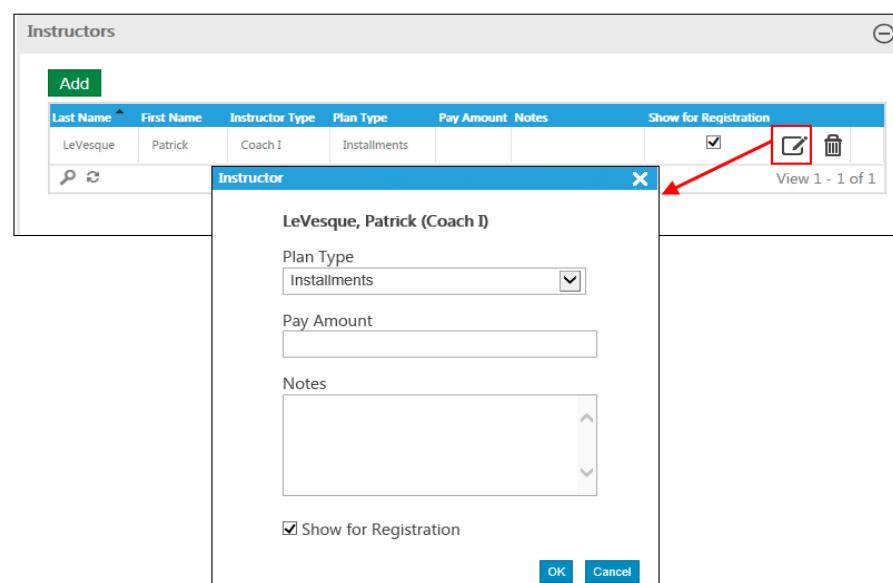
Add

Selected	Number	First Name	Last Name	Gender
<input type="checkbox"/>	RES-08-2013-000005	Jenny	Smith	Female
<input type="checkbox"/>	RES-08-2013-000007	Kate	Jones	Female
<input type="checkbox"/>	07-2013-000002	Patrick	LeVesque	Male
<input type="checkbox"/>	RES-08-2013-000006	Peter	Peterson	Male

Page 1 of 1 10 View 1 - 4 of 4

Add Selected **Close**

Once you have added the instructor, click the **Edit** button to assign a specific payment plan for the instructor using the Plan Type list.



Instructors

Add

Last Name	First Name	Instructor Type	Plan Type	Pay Amount	Notes	Show for Registration
LeVesque	Patrick	Coach I	Installments			<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="button" value="Delete"/>

Instructor

LeVesque, Patrick (Coach I)

Plan Type:

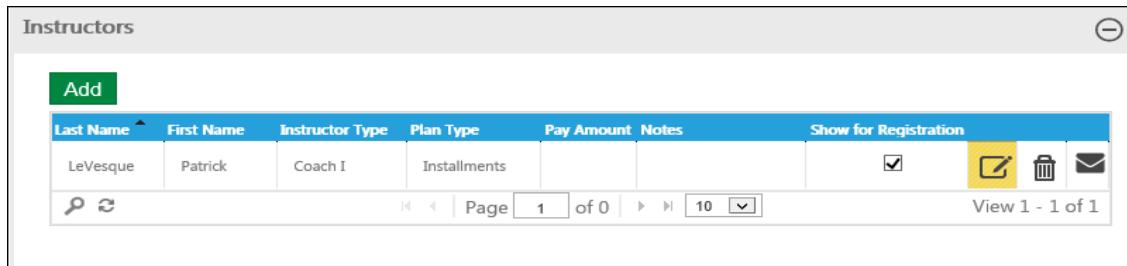
Pay Amount:

Notes:

Show for Registration

OK **Cancel**

To include the instructor's name with the class details on the Class Registration page and on the citizen portal, select the Show for Registration check box. When you save the instructor record, the program updates the Plan Type and Show for Registration fields accordingly.



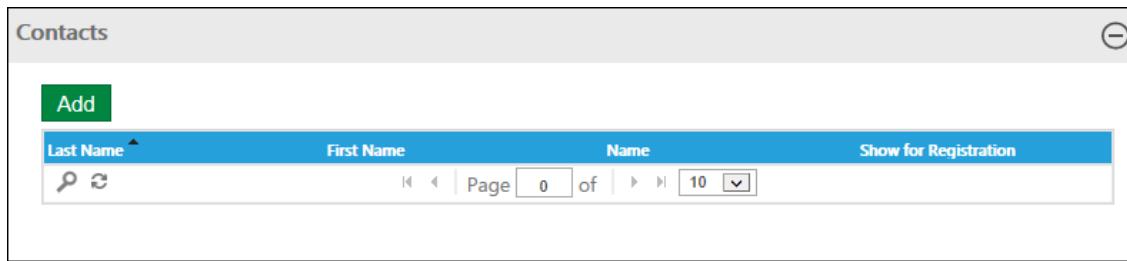
Last Name	First Name	Instructor Type	Plan Type	Pay Amount	Notes	Show for Registration
LeVesque	Patrick	Coach I	Installments			<input checked="" type="checkbox"/>

View 1 - 1 of 1

If the instructor record includes an email address, the email button is available. Click this button to create an email message with the To box completed with the instructor email address and the Subject field containing the class identifier.

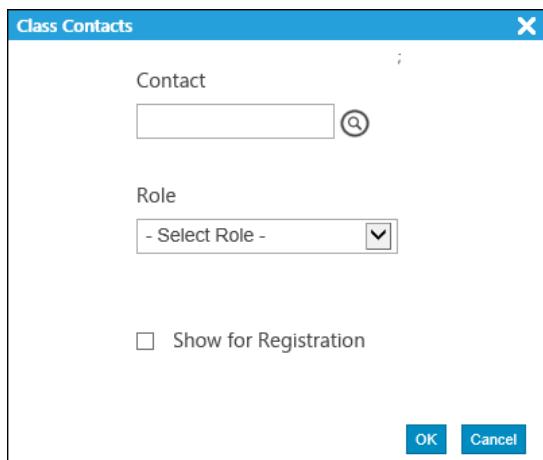
Contacts

The Contacts section identifies personnel who are associated with a class, such as field staff or monitors. Contacts and contact roles must be defined on the Administration tab.



Last Name	First Name	Name	Show for Registration
			<input checked="" type="checkbox"/>

When you are adding a contact, the Contact field includes the auto populate functionality. When you type the first few letters of a name, the program provides a list of existing options that match the text entered. The more text you enter, the narrower the list of possible selections. When the list of options provides a matching value, you can stop entering text and click the value to complete the field.



Contact: @

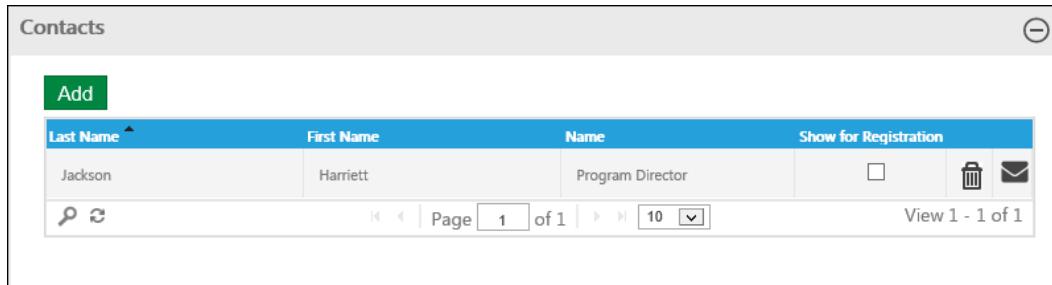
Role:

Show for Registration

OK Cancel

Use the Show for Registration check box to make the contact information on the citizen portal.

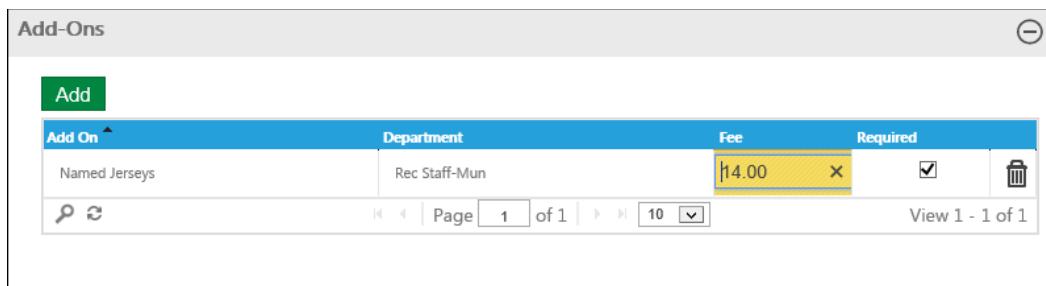
If the contact record includes an email address, the **Email** button is available. Click this button to create an email message with the **To** box completed with the contact email and the **Subject** field containing the class identifier.



Last Name	First Name	Name	Show for Registration
Jackson	Harriett	Program Director	<input type="checkbox"/>

Add On

The Add On group provides a list of items that are available for the activity. When the **Required** check box is selected, the add-on item is automatically included in the registration.



Add On	Department	Fee	Required
Named Jerseys	Rec Staff-Mun	\$14.00	<input checked="" type="checkbox"/>

Add On records are maintained using the Add On types option in the Parks and Rec Setup group on the Administration tab and assigned to classes using the **Add** button in this group.

Add-on fees are assigned when the records are created, but you can adjust the fee amount for a specific transaction by clicking in the **Fee** field and entering a new cost.

Notes

The Notes option assigns a note to the class. When you click **Add** or the edit button, the Create Note option provides the Note Text box.

Notes

Add

Text

This is a one-time only offer.

Created By
System, Admin

Create Date
08/14/2013 12:33:49 PM

Note Text
This is a one-time only offering.

View 1 - 1 of 1

Recreation Items

Recreation Items assigns facilities and equipment to the class record. Using this option when you create or update a class removes the item from rental availability according to the times assigned to the class.

Recreation Items

Add

Item Number

	Number	Name	Location	Type
<input type="checkbox"/>	IF--08-2013-000001	Batting Cages	Hayward Field	Indoor Facility
<input checked="" type="checkbox"/>	EQ--11-2013-000003	Canopy Tent	Park Pond Park	Equipment
<input type="checkbox"/>	AR--08-2013-000002	Ice Arena	Hayward Arena	Arena

View 1 - 3 of 3

Add Selected Close

Hours

The Hours table defines the daily schedule for a class. The default value for each day is 12:00 PM to 12:00 PM. To define times, select the IsActive check box for the day, and then select the applicable times from the Start and End Time lists.

Hours				
Day of the week	IsActive	Start time	End time	
Sunday	<input type="checkbox"/>	12:00 PM	<input checked="" type="checkbox"/>	12:00 PM
Monday	<input type="checkbox"/>	12:00 PM	<input checked="" type="checkbox"/>	12:00 PM
Tuesday	<input type="checkbox"/>	12:00 PM	<input checked="" type="checkbox"/>	12:00 PM
Wednesday	<input type="checkbox"/>	12:00 PM	<input checked="" type="checkbox"/>	12:00 PM
Thursday	<input type="checkbox"/>	12:00 PM	<input checked="" type="checkbox"/>	12:00 PM
Friday	<input type="checkbox"/>	12:00 PM	<input checked="" type="checkbox"/>	12:00 PM
Saturday	<input type="checkbox"/>	12:00 PM	<input checked="" type="checkbox"/>	12:00 PM

When you select a start time, the default value for the End Time field is one hour later than the value entered in the Start Time field.

The available time intervals, which can be five, fifteen, thirty, or sixty minutes, are defined using the Time Picker Interval list in System Settings. If you select a start time, you must also select an end time.

Discounts

The Discounts table displays the discounts that have been set up in Administration and applied to the selected class.

Discounts				
Add				
Name	Description	Type	Discount	
Boy Scouts	Boy Scouts	Custom	5.00%	 
City of Tyler Employee	City of Tyler Employee	Employee	10.00%	 
Employee	Employee	Employee	\$7.00	 
Middle Age	Middle Age	Age	\$3.00	 

Clicking the **Add** button opens a dialog containing the discounts that are available to be applied to the class.

Discounts

Add

Name

Boy Scouts

City of Ty

Employee

Middle A

Add

Name	Description	Type	Discount
<input type="checkbox"/> Test_Percentage	test percent discount	Age	15.00%
<input type="checkbox"/> Test_Dollar Amount	test dollar amount	Age	\$10.00
<input type="checkbox"/> 60 & Older	test	Age	\$1.00
<input type="checkbox"/> Stefan Age	Stefan Age	Age	1.40%
<input type="checkbox"/> Multi Family	Multi Family	Multi-Family	
<input type="checkbox"/> AAA	AAA Membership	Custom	5.00%

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Add Selected Close

To apply a discount, select the corresponding check box, and click **Add Selected**.

Clicking the **Edit** icon opens the Discount Details page, where the details of the discount are available for editing.

Discount Details

Parks & Rec >> Class >> Edit Discount

Back to Class Save

Name*	Dollar Amount
Boy Scouts	<input type="text"/>
Description	Percentage
Boy Scouts	5.00
Discount Type*	Start Date*
Custom	5/7/2018
<input checked="" type="checkbox"/> Include Family Members	End Date
<input checked="" type="checkbox"/> Include Classes	<input type="text"/>
<input checked="" type="checkbox"/> Include Rentals	
<input checked="" type="checkbox"/> Include Memberships	
<input checked="" type="checkbox"/> Include Non-Resident	

The Name of the discount, the Discount Type, and the Start Date are required entries. A discount Dollar Amount or Percentage also must be entered.

To make this discount available for family members, classes, rentals, memberships or non-residents, select the appropriate check box at the bottom of the page.

Discount Types

Discount Type	Description
Age	This discount applies to a contact's age. Selecting Age displays From Age and To Age fields. Any contact whose age falls within the range entered here is eligible for this discount. Both fields do not require entries; for example, if the discount is for seniors, only the From Age needs to be entered.
Employee	This discount applies to any employee who has the Employee check box checked on the Contact Details page. Selecting Employee displays an Available to Family Members check box. Selecting this check box makes family members also eligible for the employee discount.
Custom	This discount may apply to AAA members, veterans, boy scouts and other groups of your choosing. All custom discounts are displayed and available for selection on the Contact Details page. Selecting this check box also displays the Available to Family Members check box.
Multi-Family	<p>This discount applies when a contact registers other family members for the same class or membership. Selecting Multi-Family displays a Multi-Family Discount Setup section at the bottom of the page (see image below). Beginning with Family Member #2, this section contains fields for setting up dollar amount or percentage discounts that apply when additional family members are registered.</p> <p>For Family Member #2, select the discount dollar amount or percentage and click Add. Discount dollar amount and percentage fields for Family Member #3 display the Family Member #2 fields to let you add a discount for a third family member, and so on.</p> <p>You may change the order of the discounts by clicking the up or down arrow to the right of the fields.</p> <p>If the number of family members registered for the same class exceeds the number set up here, the last discount is applied to the additional members; for example, if multi-family discount is set up for family members 2 and 3 only and a fourth and fifth member are registered, the discount applied to family member 3 is applied to members 4 and 5.</p> <p>Existing family class and membership registrations in determining whether a multi-family discount is eligible during a registration.</p> <p>During the registration payment process, the Order Summary displays a discount line item for each family member with the family member number included.</p>

Multi-Family Discount Setup Section

Discount Type*

Available to Classes

Available to Rentals

Available to Memberships

Available to Non-Resident

Multi-Family Discount Setup

Family Member #2	<input type="text" value="4.00"/>	\$ or	<input type="text" value="10.00"/>	%				
Family Member #3	<input type="text"/>	\$ or	<input type="text" value="15.00"/>	%				
Family Member #4	<input type="text"/>	\$ or	<input type="text" value="20.00"/>	%				
Family Member #5	<input type="text"/>	\$ or	<input type="text"/>	%	Add			

Save and New **Save**

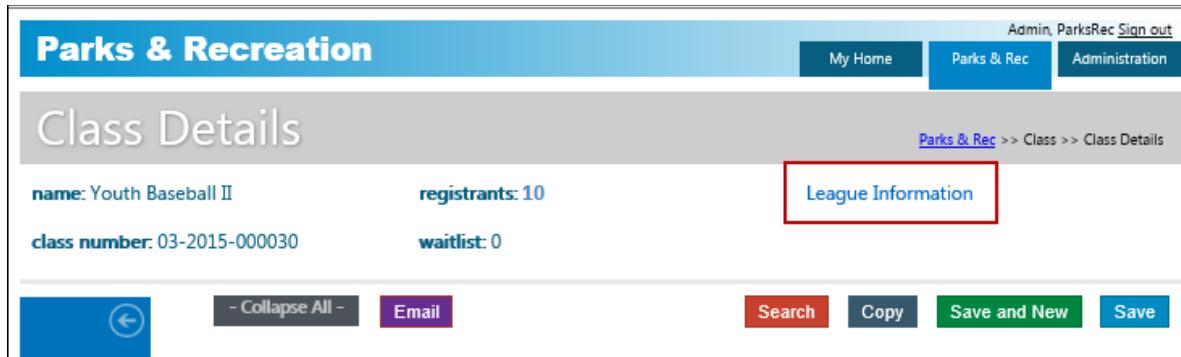
To return to the Class Details page from the Discount Details page, click the **Back to Class** button.

Class Detail Maintenance Options

On the Class Details page, there are several options available that allow you to complete tasks and manage details associated with the class.

League Information Link

For classes identified as grouped classes, the Class Details page displays the League Information link, which links to the URL for a third-party league administration site. The League Information link is established on the Integration Settings page.



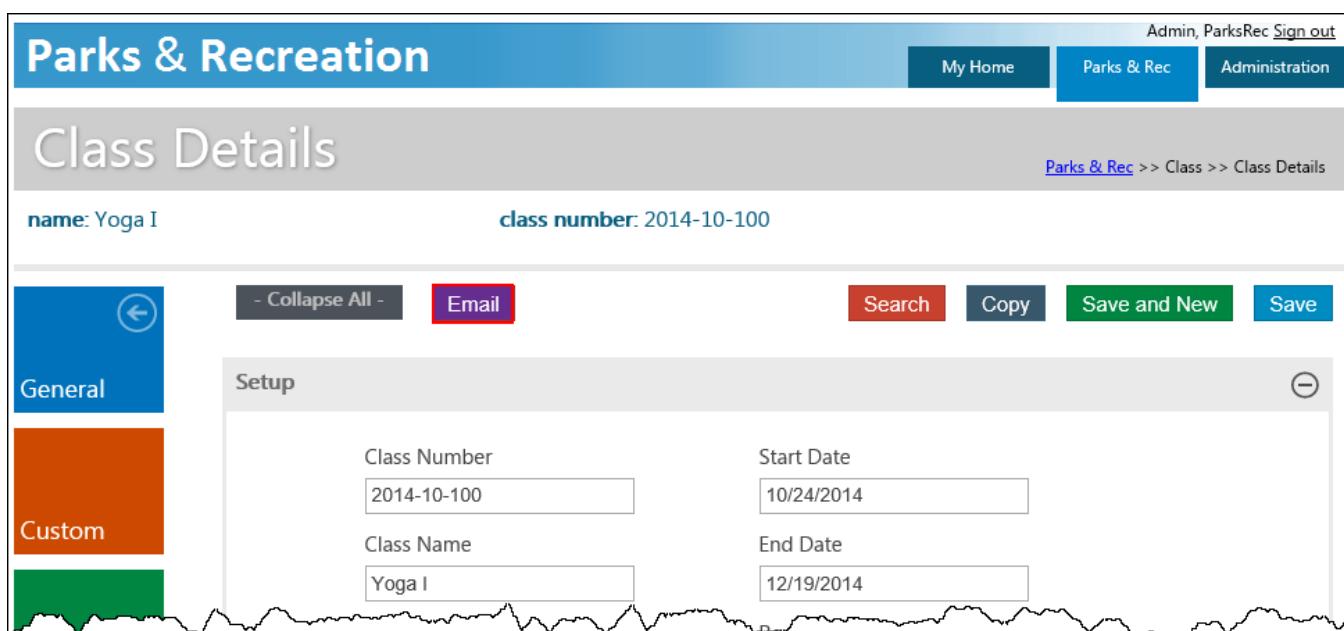
The screenshot shows the Parks & Recreation Class Details page for a class named "Youth Baseball II". The page includes the following information:

- name:** Youth Baseball II
- registrants:** 10
- class number:** 03-2015-000030
- waitlist:** 0

At the top right, there is a "League Information" link, which is highlighted with a red box. The page also features standard navigation buttons: "My Home", "Parks & Rec", "Administration", "Search", "Copy", "Save and New", and "Save".

Email

The Email option provides the Email Update page, where you can elect to send a custom email to class registrants who have a valid email address. The distribution list for the class includes contacts who are on the class waitlist.

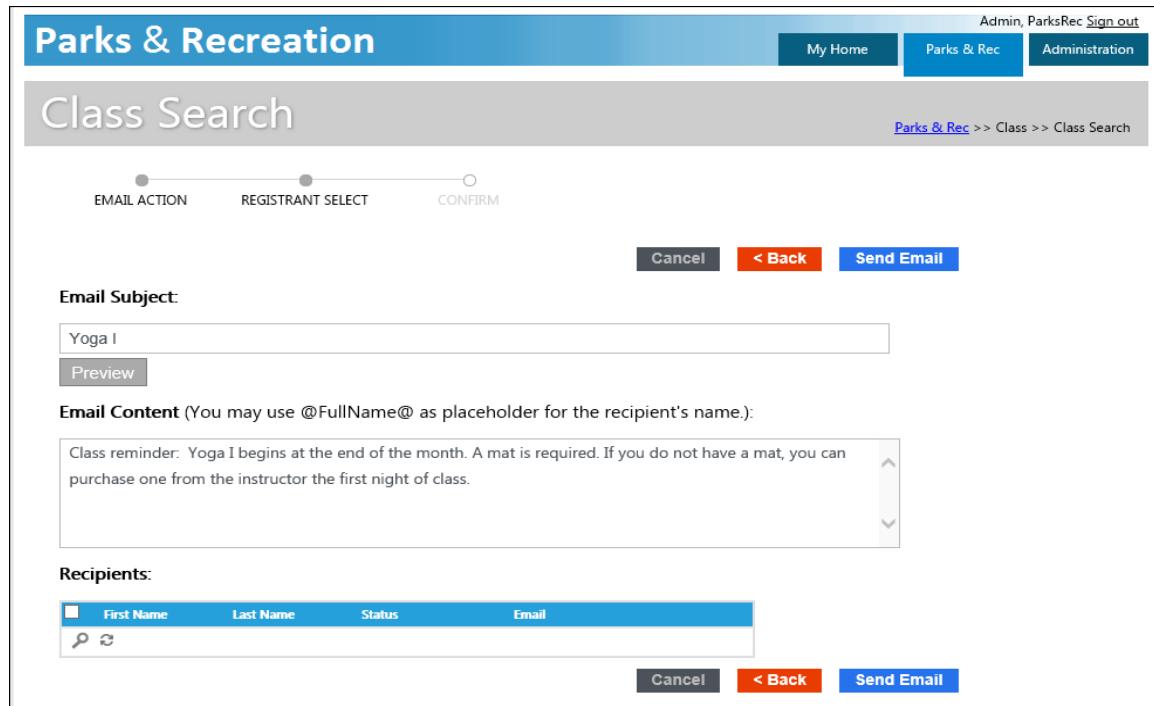


The screenshot shows the Parks & Recreation Class Details page for a class named "Yoga I". The page includes the following information:

- name:** Yoga I
- class number:** 2014-10-100

On the left, there is a sidebar with three categories: "General" (blue), "Custom" (orange), and "Setup" (green). The "Setup" category is currently selected. The "Email" button in the top right is highlighted with a red box. The page also features standard navigation buttons: "My Home", "Parks & Rec", "Administration", "Search", "Copy", "Save and New", and "Save".

When you select Email, the Email Update provides the option for distributing an email to class registrants who have a valid email address. The Email Update page provides the Email Subject and Email Content fields. The default value for the Email Subject line is the class name, but you can change this. The Email Content field is customizable for each message.



Parks & Recreation

Class Search

Admin, ParksRec [Sign out](#)

My Home Parks & Rec Administration

EMAIL ACTION REGISTRANT SELECT CONFIRM

[Cancel](#) [< Back](#) [Send Email](#)

Email Subject: Yoga I

Preview

Email Content (You may use @FullName@ as placeholder for the recipient's name.):

Class reminder: Yoga I begins at the end of the month. A mat is required. If you do not have a mat, you can purchase one from the instructor the first night of class.

Recipients:

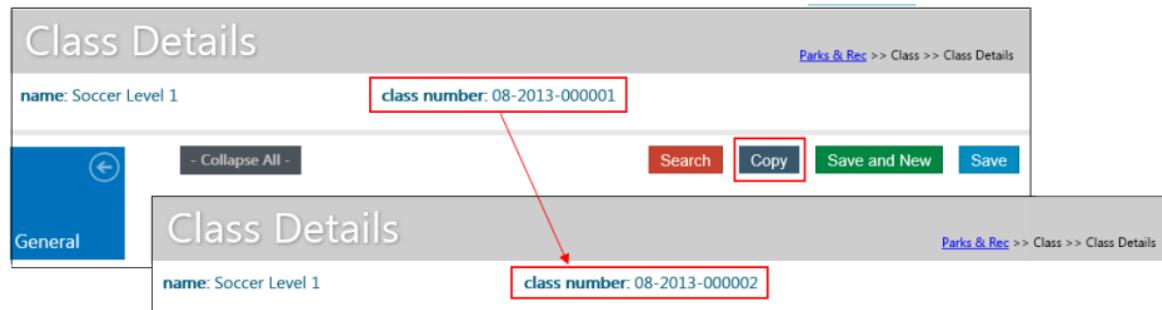
<input type="checkbox"/>	First Name	Last Name	Status	Email

[Cancel](#) [< Back](#) [Send Email](#)

Using the Recipients group, you can select all registrants or individual registrants who should receive the email notice.

Copy

For existing class records, click **Copy** to retain the current class record and create a new record with a new class number.



Class Details

Parks & Rec > Class > Class Details

name: Soccer Level 1 class number: 08-2013-000001

- Collapse All -

[Search](#) [Copy](#) [Save and New](#) [Save](#)

General

Class Details

Parks & Rec > Class > Class Details

name: Soccer Level 1 class number: 08-2013-000002

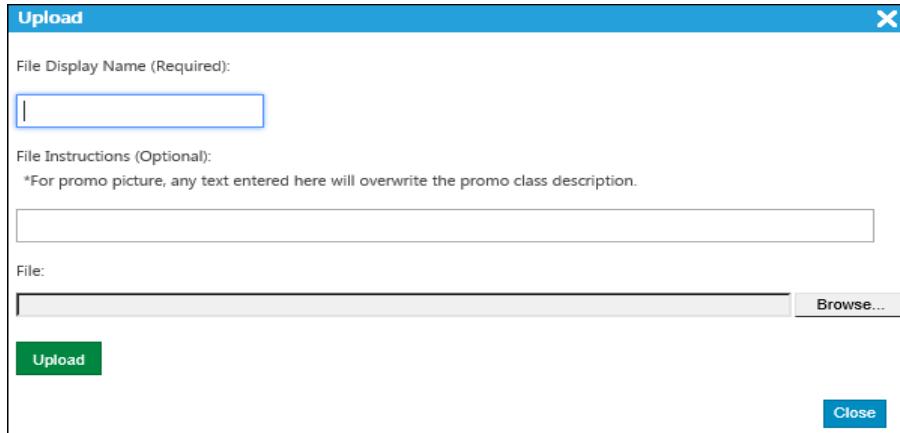
You can update the new record to customize the individual details.

Once you create a class record, you cannot change the class type associated with the class.

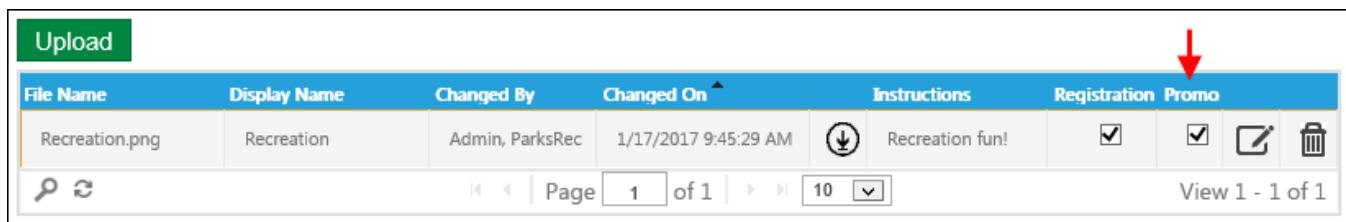
Display Images on the Citizen Portal

The citizen portal provides a scrolling banner that displays up to six images that represent recreation activity offerings. Once you have created class records, use the Documents option to upload a permissible image file to depict the course.

In the Upload dialog box, you must enter a file display name. When you are uploading a promotional picture for a class, you can overwrite the class description that displays on the portal with the picture by adding text to the File Instructions field. If you do not enter instructions, the class description displays with the picture.



After the image uploads, select the Promo check box to identify the image as a scrolling item. When the Is Special Event check box is selected on the Class Details page, and the Promo check box is selected, the image displays on the citizen portal. When a user hovers his or her pointer over the image, the class description displays.



File Name	Display Name	Changed By	Changed On	Instructions	Registration	Promo
Recreation.png	Recreation	Admin, ParksRec	1/17/2017 9:45:29 AM	 Recreation fun!	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

For classes identified as special events, when you upload an image and then select the Promo check box, the Show Image Only check box is available. If you select this check box, the display is restricted to the image only; the promotional text does not display.

Notes X

File Display Name:

Instructions:

Recreation fun!

^
v
Show image only

*For promo picture, any text entered in Instructions will overwrite the promo class description.

OK Cancel

Team

Team defines teams of individuals who are related to an activity.

Setup

The Setup fields describe the team and identify the team type. The Team Type is a required field.

Setup ⊖

<p>Team Name</p> <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="Soccer Youth"/> <p>Description</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 100px; margin-bottom: 10px;"> The Soccer Youth team provides soccer opportunities for girls and boys ages 8 to 12. <div style="text-align: right; margin-top: -10px;"> ^ v </div> </div>	<p>Team Type</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; margin-bottom: 5px;"> Soccer - C <div style="float: right; border: 1px solid #ccc; padding: 2px 5px; border-radius: 5px; background-color: #ccc; color: #ccc; text-decoration: none; font-weight: bold;">▼</div> </div> <p>Create Date</p> <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text" value="8/14/2013"/> <p>Linked Class</p> <div style="border: 1px solid #ccc; padding: 2px; width: 100%; margin-bottom: 5px;"> @ Delete </div>
---	---

Team types are maintained in the Parks & Rec. Setup group on the Administration page. Each team type is required to have a defined captain role. When you are completing the Team Setup page and you select a team type for which there is no defined captain role, the program displays a message that the record cannot be saved because of the omission in the Team Type setup.

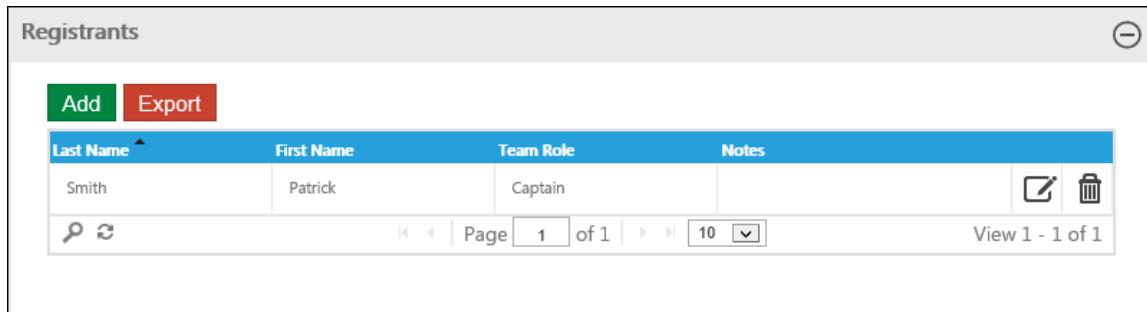
The Linked Class box provides the option for linking a team to a specific class record. In this case, you can update the participant's team role directly from the Registrants group.

Use the **Search** button to find a class or use the **Delete** button to remove an existing link.

To complete the Registrants or Notes details, click **Save** after completing the Setup fields.

Registrants

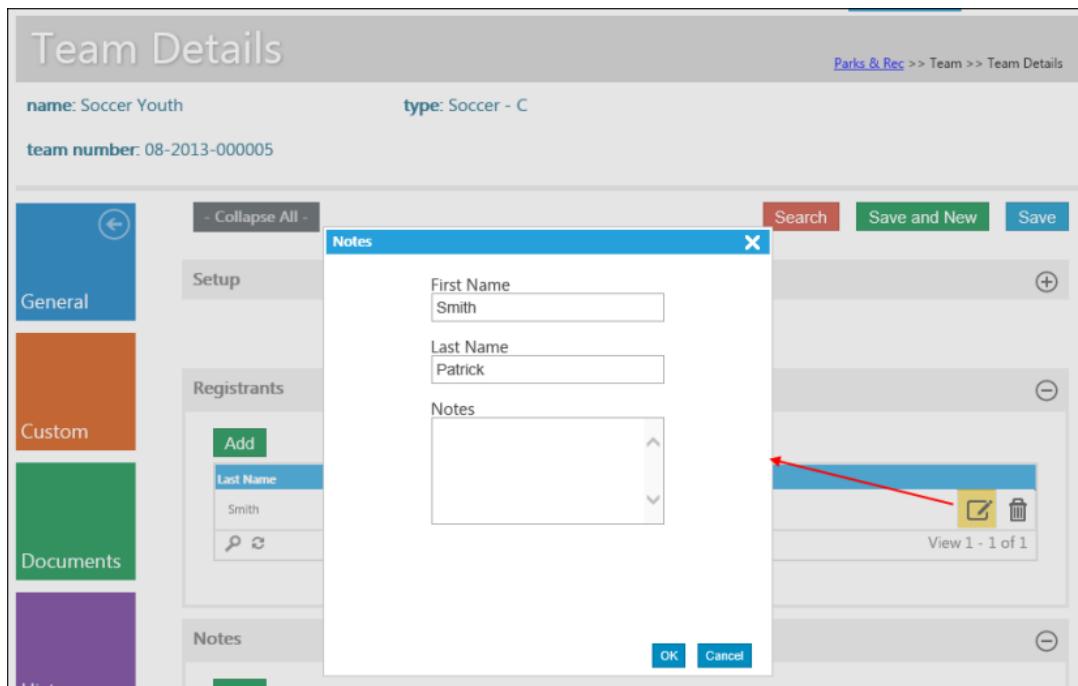
Registrants identifies the participants who have registered for the activity and who are identified as team members.



The screenshot shows a table with columns: Last Name, First Name, Team Role, and Notes. The data row is: Smith, Patrick, Captain, and an empty Notes field. There are edit and delete icons for this row. Below the table is a search bar and a page navigation bar showing 'Page 1 of 1'.

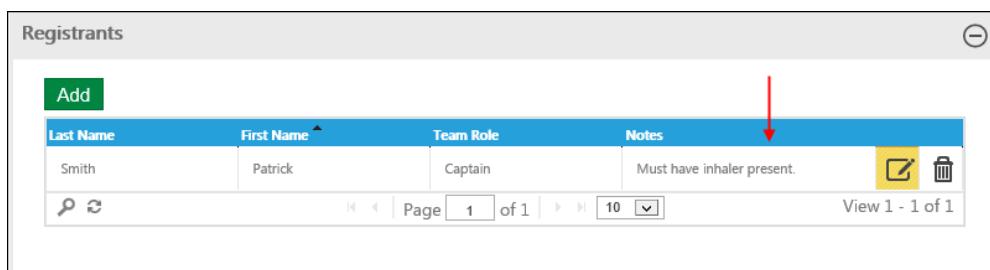
When you add a registrant to a team, the list of available contacts to be added as a registrant is limited to contacts who are registered for the class linked to the team, if the class linked to the team has a class type for which the Class Type Format is defined as Grouped Individuals.

Click the **Edit** button to add notes specific to a team member record.



The screenshot shows the 'Team Details' page with 'Soccer Youth' as the name and 'Soccer - C' as the type. The 'Registrants' sub-tab is selected. A 'Notes' dialog box is open, showing fields for First Name (Smith) and Last Name (Patrick), and a Notes text area. A red arrow points from the 'Notes' area in the dialog to the 'Notes' column in the Registrants table on the main page.

Once you add notes, they are included with the Registrant details.



The screenshot shows the 'Registrants' list page again. The 'Notes' column for the first row now contains the text 'Must have inhaler present.' A red arrow points to this note in the table.

Contacts

Contacts allows you to add contacts to the team and to assign roles to the contracts according to the role types associated with the team type. You cannot add contacts to a new team until you first save the team record. The Contacts table includes the Delete and Email options. (The Email option displays after you save the Contact information.)

Contacts			
Add			
Last Name	First Name	Team Role	
Jackson	Harry	Participant	 
Jackson	Mary	Participant	 
Madison	Marcy	Captain	 

View 1 - 3 of 3

When you are adding a team contact, the Contact field includes autocomplete functionality. When you type the first few letters of a name, the program provides a list of existing options that match the text entered. The more text you enter, the narrower the list of possible selections. When the list of options provides a matching value, you can stop entering text and click the value to complete the field.

Team Contacts

Contact	<input type="text"/> 
Role	<input type="button" value="- Select Role -"/>
<input type="button" value="OK"/> <input type="button" value="Cancel"/>	

Notes

Notes provides additional information for the team. Click **Add** or the **Edit** button to create or maintain notes.

Notes			
Add			
Text	Created By	Create Date	
Teams are subdivided after registration is complete.	System, Admin	08/14/2013 01:08:09 PM	 
<input type="button" value="View 1 - 1 of 1"/>			

Location

Location maintains location records by type and status.

Setup

Setup fields provide the location profile: name, type, status, and description. Contact information can also be provided for the site.

Setup

Location Name	Location Number
Bartlett School	CL-08-2013-000001
Location Type	Phone Number
Classroom	
Location Status	Fax Number
Open	
Email	Website
<input checked="" type="checkbox"/> Active	Description
	This middle school contains 10 available classrooms suitable for adult learners.

The program automatically assigns a location number to a location record. If you have defined a prefix for the location type associated with a location, the location number includes that prefix.

Parks & Recreation

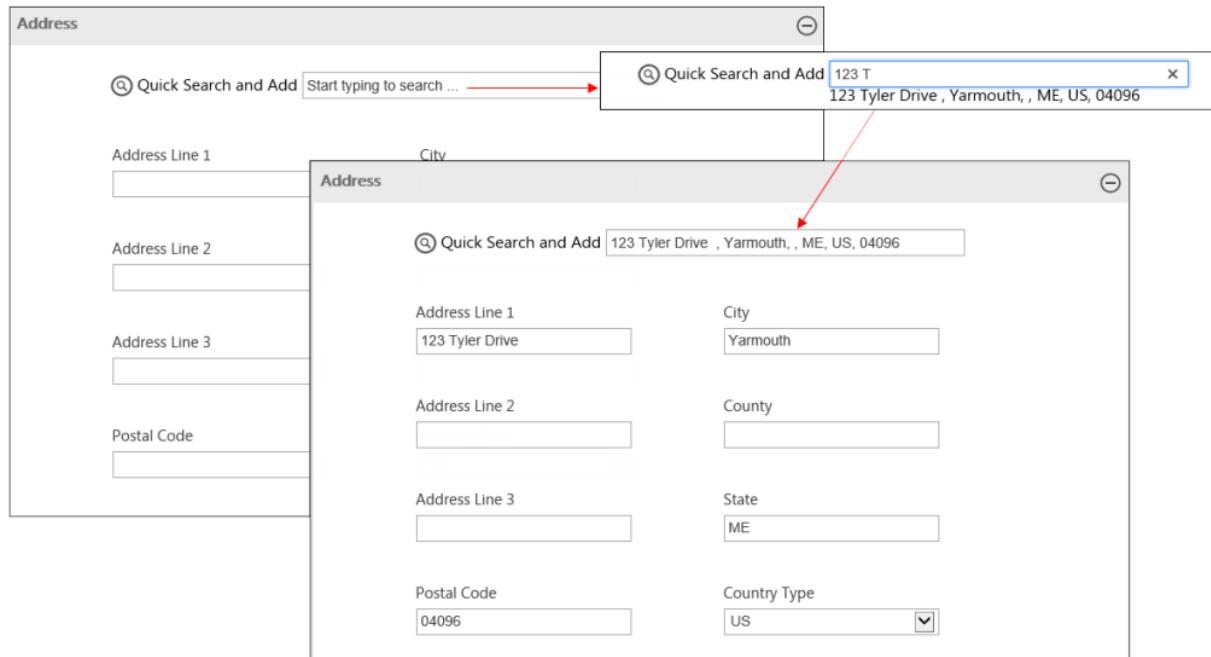
Location Type Details	Parks & Recreation																																	
<table border="1"> <tr> <td>Setup</td> </tr> <tr> <td>Name: Park</td> <td>Final</td> </tr> <tr> <td>Description: Community park</td> <td>Custom</td> </tr> <tr> <td>Prefix: PK-</td> <td>General</td> </tr> </table>	Setup	Name: Park	Final	Description: Community park	Custom	Prefix: PK-	General	<table border="1"> <tr> <td>Location Details</td> </tr> <tr> <td>name: Park Pond Park</td> <td>location number: PK-08-2013-000003</td> </tr> <tr> <td>status: Open</td> <td>type: Park</td> </tr> <tr> <td colspan="2"> <table border="1"> <tr> <td>- Collapse All -</td> <td>Search</td> <td>Save and New</td> <td>Save</td> </tr> <tr> <td>General</td> <td>Location Name: Park Pond Park</td> <td>Location Number: PK-08-2013-000003</td> </tr> <tr> <td>Custom</td> <td>Location Type: Park</td> <td>Phone Number:</td> </tr> <tr> <td>Documents</td> <td>Location Status: Open</td> <td>Fax Number:</td> </tr> <tr> <td>History</td> <td>Email:</td> <td>Website:</td> </tr> <tr> <td></td> <td><input checked="" type="checkbox"/> Active</td> <td>Description: This is a 1-acre park to the east of Park Pond.</td> </tr> </table> </td> </tr> </table>	Location Details	name: Park Pond Park	location number: PK-08-2013-000003	status: Open	type: Park	<table border="1"> <tr> <td>- Collapse All -</td> <td>Search</td> <td>Save and New</td> <td>Save</td> </tr> <tr> <td>General</td> <td>Location Name: Park Pond Park</td> <td>Location Number: PK-08-2013-000003</td> </tr> <tr> <td>Custom</td> <td>Location Type: Park</td> <td>Phone Number:</td> </tr> <tr> <td>Documents</td> <td>Location Status: Open</td> <td>Fax Number:</td> </tr> <tr> <td>History</td> <td>Email:</td> <td>Website:</td> </tr> <tr> <td></td> <td><input checked="" type="checkbox"/> Active</td> <td>Description: This is a 1-acre park to the east of Park Pond.</td> </tr> </table>		- Collapse All -	Search	Save and New	Save	General	Location Name: Park Pond Park	Location Number: PK-08-2013-000003	Custom	Location Type: Park	Phone Number:	Documents	Location Status: Open	Fax Number:	History	Email:	Website:		<input checked="" type="checkbox"/> Active	Description: This is a 1-acre park to the east of Park Pond.
Setup																																		
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Documents	Location Status: Open	Fax Number:																																
History	Email:	Website:																																
	<input checked="" type="checkbox"/> Active	Description: This is a 1-acre park to the east of Park Pond.																																

If you clear the Active check box for a location, it remains available to existing activity records, but you cannot assign the location to new activities or classes.

When you attempt to delete a location that is currently being used for a class or rental, the program displays an error message and prevents the deletion.

Address

The Address section provides essential address components for the location. Use the Quick Search and Add feature to complete the details for existing addresses.

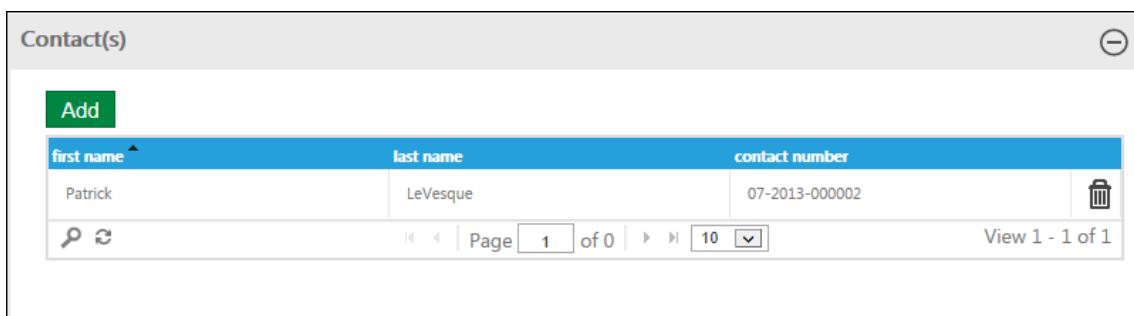


The screenshot shows the 'Address' input screen. On the left, there is a vertical form with fields for 'Address Line 1', 'Address Line 2', 'Address Line 3', and 'Postal Code'. On the right, there is a detailed address form with fields for 'City', 'Address Line 1', 'Address Line 2', 'Address Line 3', 'County', 'State', 'Postal Code', and 'Country Type'. A red arrow points from the 'Quick Search and Add' input field in the main form to the 'Quick Search and Add' input field in the detailed address form. Another red arrow points from the '123 T' entry in the main form's search field to the '123 Tyler Drive, Yarmouth, ME, US, 04096' entry in the detailed address form's search field.

For example, when you type "123 T" in the Quick Search and Add box, the program provides available options matching the data. Select the correct option and the program completes the individual data fields.

Contacts

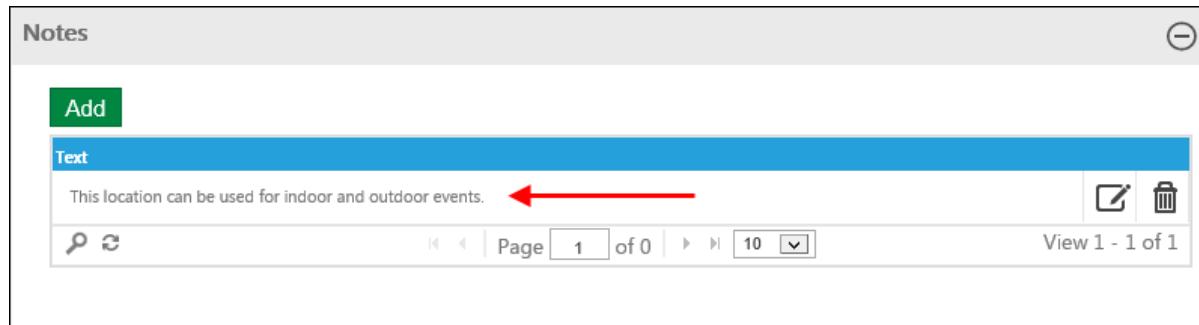
The Contacts option provides the name of the individual or individuals responsible for the location.



The screenshot shows the 'Contact(s)' list screen. It features a table with columns for 'first name', 'last name', and 'contact number'. A single contact entry is listed: 'Patrick' in the first name column and 'LeVesque' in the last name column. The contact number is '07-2013-000002'. At the bottom of the table, there are navigation buttons for 'Page' (set to 1 of 0), '10' (a dropdown menu), and 'View 1 - 1 of 1'.

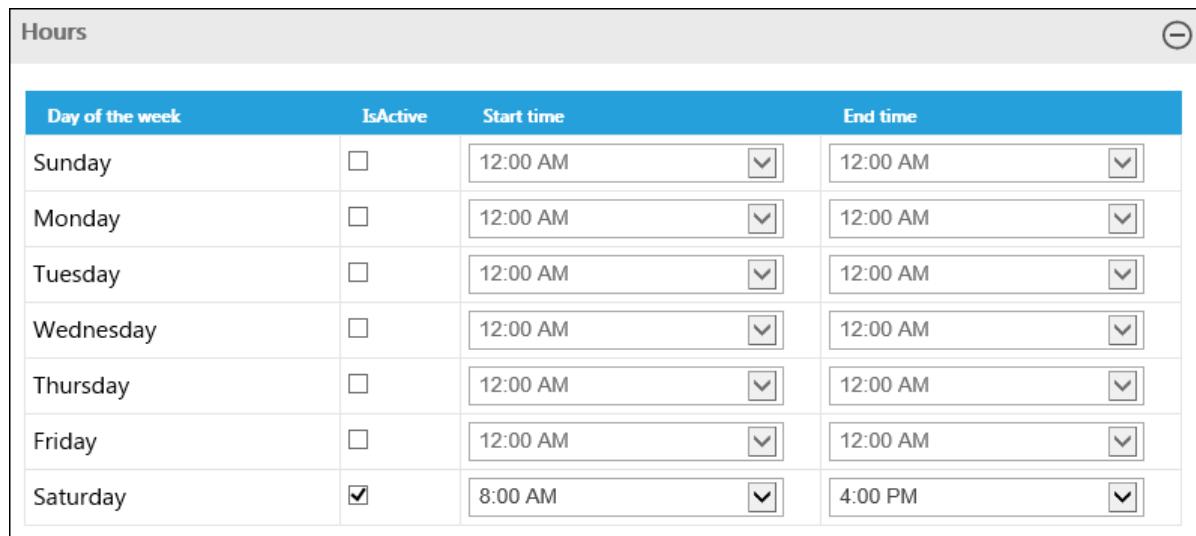
Notes

Notes provides additional information for the location. Click **Add** or the **Edit** button to create or maintain notes. When you save note text, it displays in the Notes section.



Hours

The Hours table defines the daily schedule for a location. The default value for each day is 12:00 AM to 12:00 AM. To define times, select the **IsActive** check box for the day, and then select the applicable times from the Start and End Time lists.



Day of the week	IsActive	Start time	End time
Sunday	<input type="checkbox"/>	12:00 AM	12:00 AM
Monday	<input type="checkbox"/>	12:00 AM	12:00 AM
Tuesday	<input type="checkbox"/>	12:00 AM	12:00 AM
Wednesday	<input type="checkbox"/>	12:00 AM	12:00 AM
Thursday	<input type="checkbox"/>	12:00 AM	12:00 AM
Friday	<input type="checkbox"/>	12:00 AM	12:00 AM
Saturday	<input checked="" type="checkbox"/>	8:00 AM	4:00 PM

When you select a start time, the default value for the End Time field is one hour later than the value entered in the Start Time field, but you can change this.

The available time intervals, which can be five, fifteen, thirty, or sixty minutes, are defined using the Time Picker Interval list in System Settings. If you select a start time, you must also select an end time.

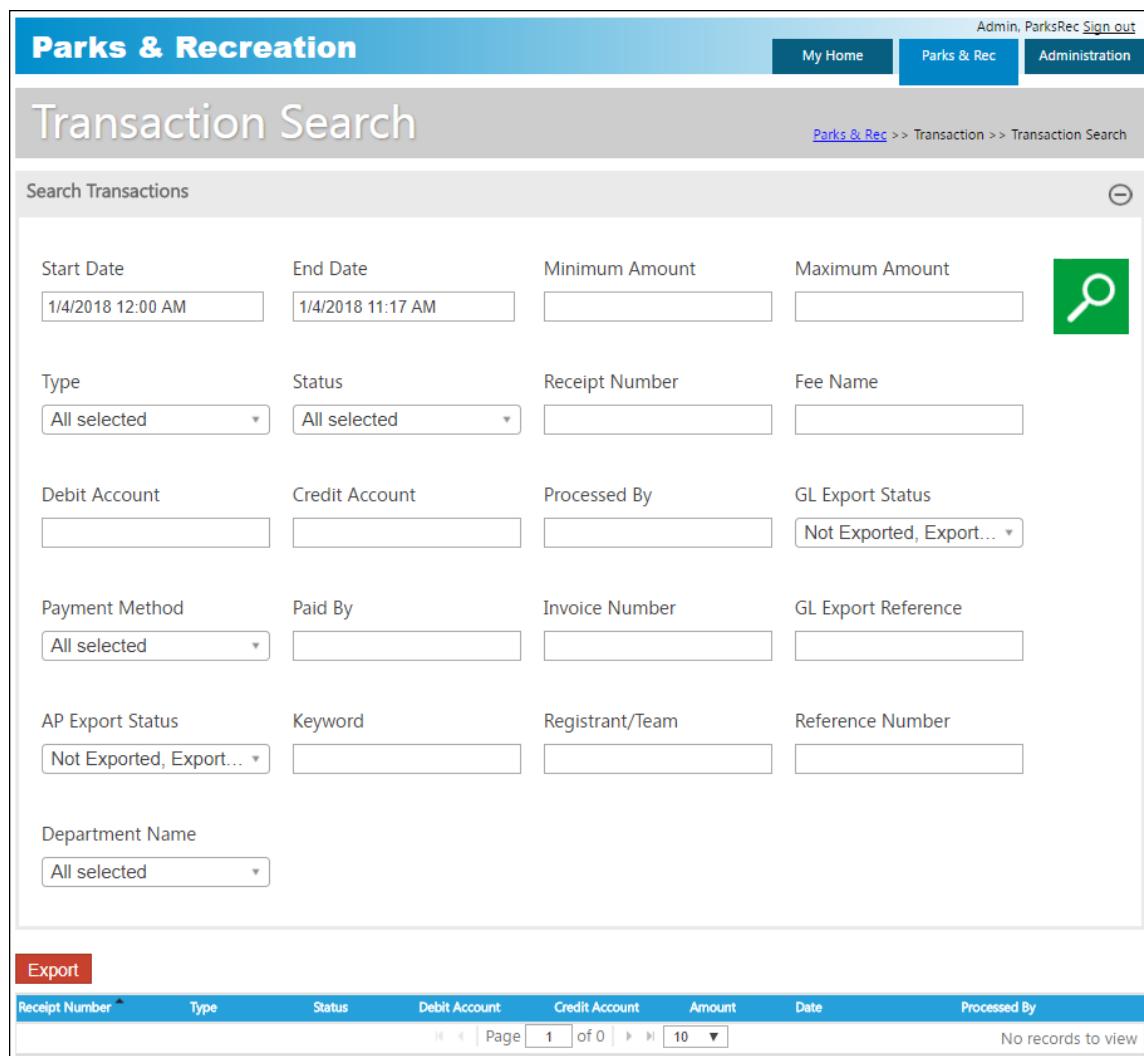
Transaction

Transaction Search

Transaction Search defines transaction records by date, amount, type, status, account, and payment method. You can also search by receipt number, fee name, payment method, invoice number paid by, and general ledger (GL) export reference identifier.

The GL Export, AP Export and Collection Export options create export files for transaction records. These options are available according to User Role permissions.

When you display the Transaction Search page, the program automatically searches and displays the current day's transactions. Use the horizontal arrow keys to view all the transaction details. The Start Date and End Date fields specify a time interval for records to include in the search; the remaining search fields provide multiselect functionality, which allows you to select one or more criteria from each list.



Once you have defined a record set, click **Export** to export the records directly to Microsoft Excel.

GL Export

The GL Export option creates a .csv export file, a standard Munis journal import layout file, or a Munis general ledger export file. The type of export file created is determined by the GL Export Settings defined on the Integration Settings page in the System Setup group on the Administration tab.

Admin, ParksRec Sign.out

My Home
Parks & Rec
Administration

Transaction GL Export

Parks & Rec >> Transaction >> Transaction GL Export

GL Export

Start Date	End Date	Minimum Amount	Maximum Amount
<input type="text" value="8/2/2018 12:00 AM"/>	<input type="text" value="8/3/2018 12:00 AM"/>	<input type="text"/>	<input type="text"/>
Type	Status	Receipt Number	Fee Name
<input type="text" value="All selected"/>	<input type="text" value="All selected"/>	<input type="text"/>	<input type="text"/>
Debit Account	Credit Account	Processed By	GL Export Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="Not Exported"/>
Payment Method	Paid By	Invoice Number	GL Export Reference
<input type="text" value="All selected"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Keyword	Registrant/Team	Reference Number	Department Name
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="All selected"/>

Include Zero Amount Transactions

🔍

Export GL Export

Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By

The Integration Settings page also includes the option of including refunds in the GL export file. When this setting is enabled, GL export files include refund details. If this setting is not enabled, the Type and Status lists do not include Refund options.

The Start Date and End Date fields specify a time interval for records to include in the search; the remaining search fields provide multiselect functionality, which allows you to select one or more criteria from each list.

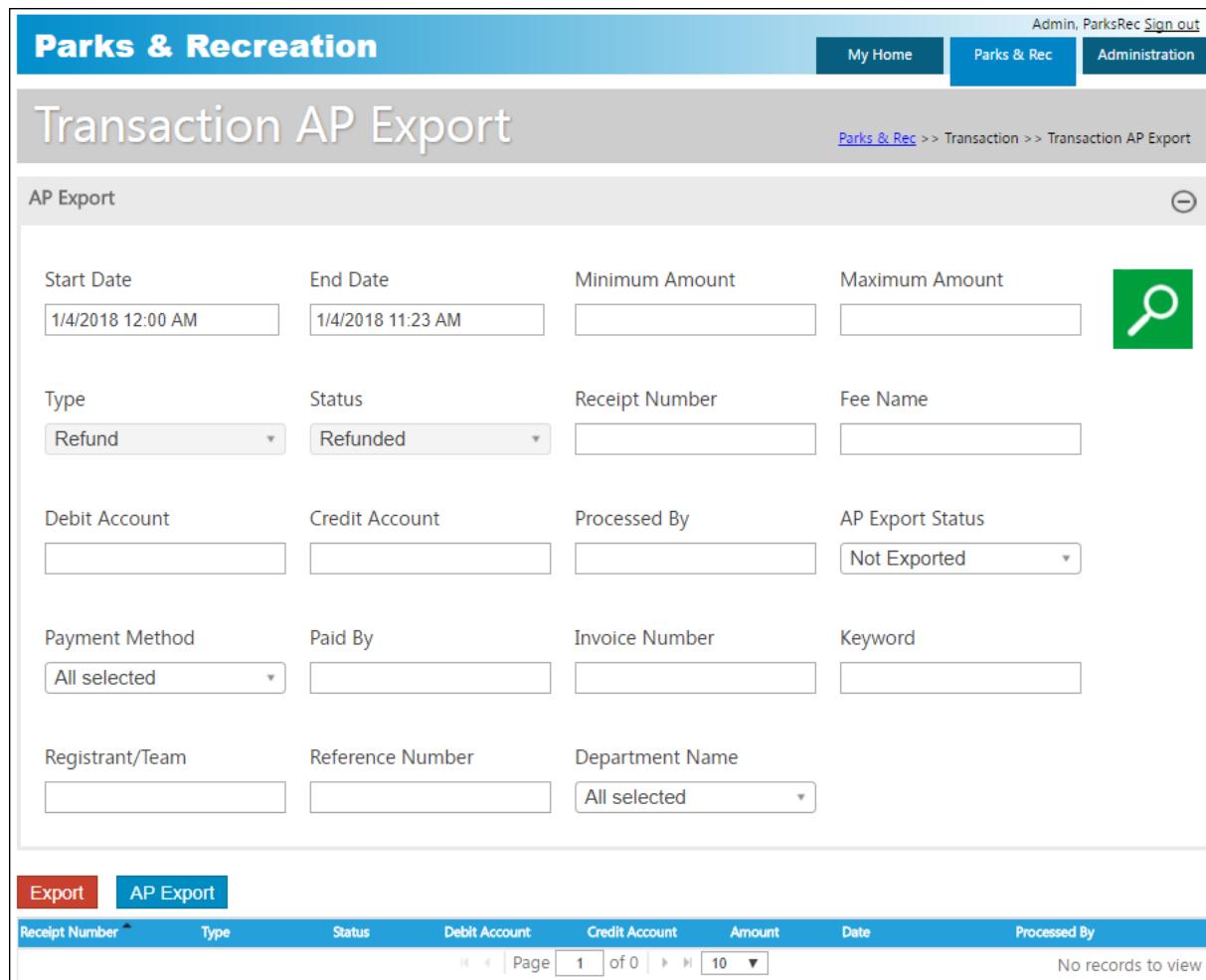
To include \$0.00 receipts in the GL export, select the Include Zero Amount Transactions check box.

If you try to create a GL export with records that have already been exported, the program displays a Confirmation message indicating that records within the file have been previously exported and you must select Continue Export to complete the current process.

AP Export

The AP Export option creates a .csv export file or a standard Munis journal import layout file. The type of export file created is determined by the Invoice Export Settings defined on the Integration Settings page in the System Setup group on the Administration tab. Settings on this page also define an AR code or a charge code for which to create a specific export file.

The AP export default type for the Type and Status lists is Refunded and cannot be changed. The default value for the AP Export Status is Not Exported, but you can change this.



Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By
							No records to view

The Start Date and End Date fields specify a time interval for records to include in the search; the remaining search fields provide multiselect functionality, which allows you to select one or more criteria from each list.

If you try to create an AP Export file for records that have already been exported, the program displays a Confirmation message indicating that records within the file have been previously exported and you must select Continue Export to complete the current process.

Collection Export

The Collection Export option creates a .csv export file or an Incode Financials file. The type of export file created is defined in the Type field in the Collection Export Settings group on the Integration Settings page in the System Setup group on the Administration tab.

The Collection Export option creates a file of Tyler Parks and Recreation payment information that may be used in balancing your organization's daily deposit.

The Type list is set to Fee Payment, and the Status list is set to Complete; these fields cannot be changed. The default value for the Collection Export Status is Not Exported, but you can change this.

Parks & Recreation Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Transaction Collection Export

[Parks & Rec](#) >> Transaction >> Transaction Collection Export

Collection Export

Start Date <input type="text" value="8/2/2018 12:00 AM"/>	End Date <input type="text" value="8/3/2018 12:00 AM"/>	Minimum Amount <input type="text"/>	Maximum Amount <input type="text"/>								
Type <input type="text" value="Fee Payment"/>	Status <input type="text" value="Complete"/>	Receipt Number <input type="text"/>	Fee Name <input type="text"/>								
Debit Account <input type="text"/>	Credit Account <input type="text"/>	Processed By <input type="text"/>	Collection Export Status <input type="text" value="Not Exported"/>								
Payment Method <input type="text" value="All selected"/>	Paid By <input type="text"/>	Invoice Number <input type="text"/>	GL Export Reference <input type="text"/>								
Keyword <input type="text"/>	Registrant/Team <input type="text"/>	Reference Number <input type="text"/>	Department Name <input type="text" value="All selected"/>								
<input type="checkbox"/> Include Zero Amount Transactions											
											
Export Collection Export											
<table border="1"> <thead> <tr> <th>Receipt Number</th> <th>Type</th> <th>Status</th> <th>Debit Account</th> <th>Credit Account</th> <th>Amount</th> <th>Date</th> <th>Processed By</th> </tr> </thead> </table>				Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By
Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By				

The Start Date and End Date fields specify a time interval for records to include in the search; the remaining search fields provide multiselect functionality, which allows you to select one or more criteria from each list.

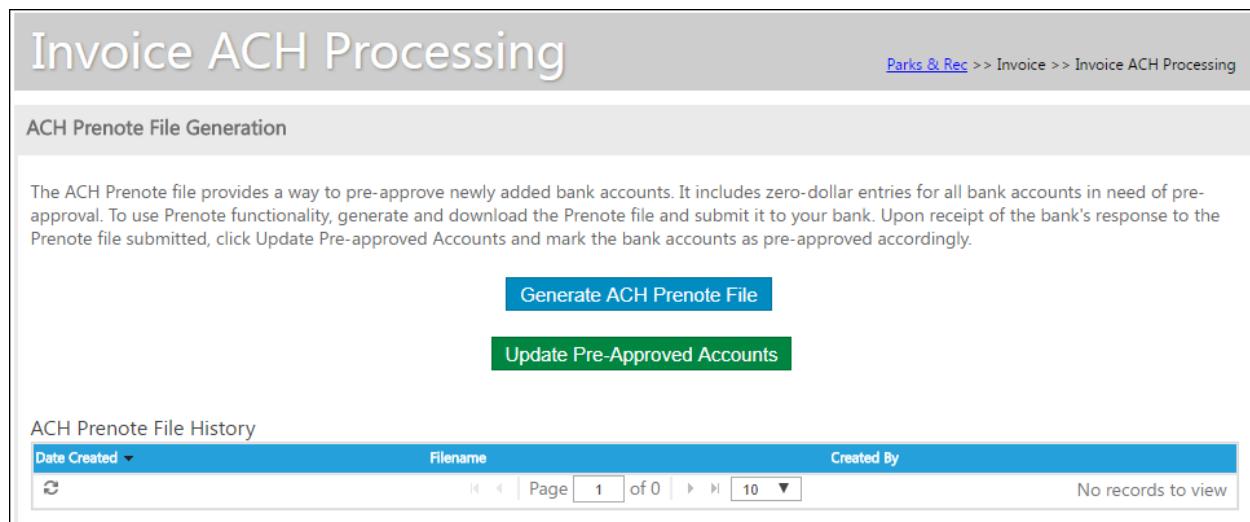
To include \$0.00 receipts in the collection export, select the Include Zero Amount Transactions check box.

Invoice

ACH Processing

ACH Processing includes options for processing payments by automated clearinghouse (ACH).

ACH Prenote File Generation creates a file of newly-added bank accounts that must be approved for before your organization's bank can receive ACH payments from them. You can submit the generated prenote file to your organization's bank for approval of new accounts.



The screenshot shows the 'Invoice ACH Processing' page. The top navigation bar includes 'Parks & Rec' and 'Invoice ACH Processing'. The main content area is titled 'ACH Prenote File Generation'. It contains a descriptive text about the ACH Prenote file and two buttons: 'Generate ACH Prenote File' (blue) and 'Update Pre-Approved Accounts' (green). Below this is a section titled 'ACH Prenote File History' with a table. The table has columns for 'Date Created', 'Filename', and 'Created By'. It includes a search icon, page navigation (Page 1 of 0), and a dropdown for items per page (10). A message at the bottom right of the table area says 'No records to view'.

The Update Pre-Approved Accounts option opens a screen that allows you to mark bank accounts as pre-approved for ACH payments.

Parks & Recreation

Invoice ACH Processing

My Home Parks & Rec Administration

ACH Prenote File Generation

The ACH Prenote file provides a way to pre-approve newly added bank accounts. It includes zero-dollar entries for all bank accounts in need of pre-approval. To use Prenote functionality, generate and download the Prenote file and submit it to your bank. Upon receipt of the bank's response to the Prenote file submitted, click Update Pre-approved Accounts and mark the bank accounts as pre-approved accordingly.

Generate ACH Prenote File

Update Pre-Approved Accounts

ACH Prenote File History Date Created

Parks & Recreation

Invoice ACH Processing

My Home Parks & Rec Administration

Parks & Rec >> Invoice >> Invoice ACH Processing

Save

Select the bank accounts which have been pre-approved.

Contact Number	First Name	Last Name	Email	Bank	Bank Account Type
RES-06-2015-0000	Marilyn	Jackson		BCC Bank	Checking
RES-11-2015-0000	Jack	Jones	jackjones@gmail.com	Bank of Haverford	Checking

View 1 - 2 of 2

Save

ACH File Generation displays the list of all unpaid invoices marked for payment by ACH, and creates an ACH file you can submit to your organization's bank.

ACH File Generation

When generating an ACH file, payment information for any unpaid, ACH-payable invoices will be included in the file. Once the process has completed, please download the file, review it, and submit it to your bank.

Generate ACH File

ACH File History

Date Created	Filename	Created By	Status	Date Processed	Processed By
1/24/2018 10:32:48 AM	ACH_2018-01-24_10-32-48.txt	Admin, ParksRec	Active		Admin, ParksRec
1/24/2018 10:30:26 AM	ACH_2018-01-24_10-30-26.txt	Admin, ParksRec	Active		Admin, ParksRec
1/24/2018 10:09:06 AM	ACH_2018-01-24_10-09-06.txt	Admin, ParksRec	Active		Admin, ParksRec
1/24/2018 9:10:23 AM	ACH_2018-01-24_09-10-23.txt	Admin, ParksRec	Active		Admin, ParksRec
1/23/2018 4:05:56 PM	ACH_2018-01-23_16-05-56.txt	Admin, ParksRec	Active		Admin, ParksRec
1/23/2018 3:41:15 PM	ACH_2018-01-23_15-41-15.txt	Admin, ParksRec	Active		Admin, ParksRec

Page 1 of 11 10 View 1 - 10 of 109

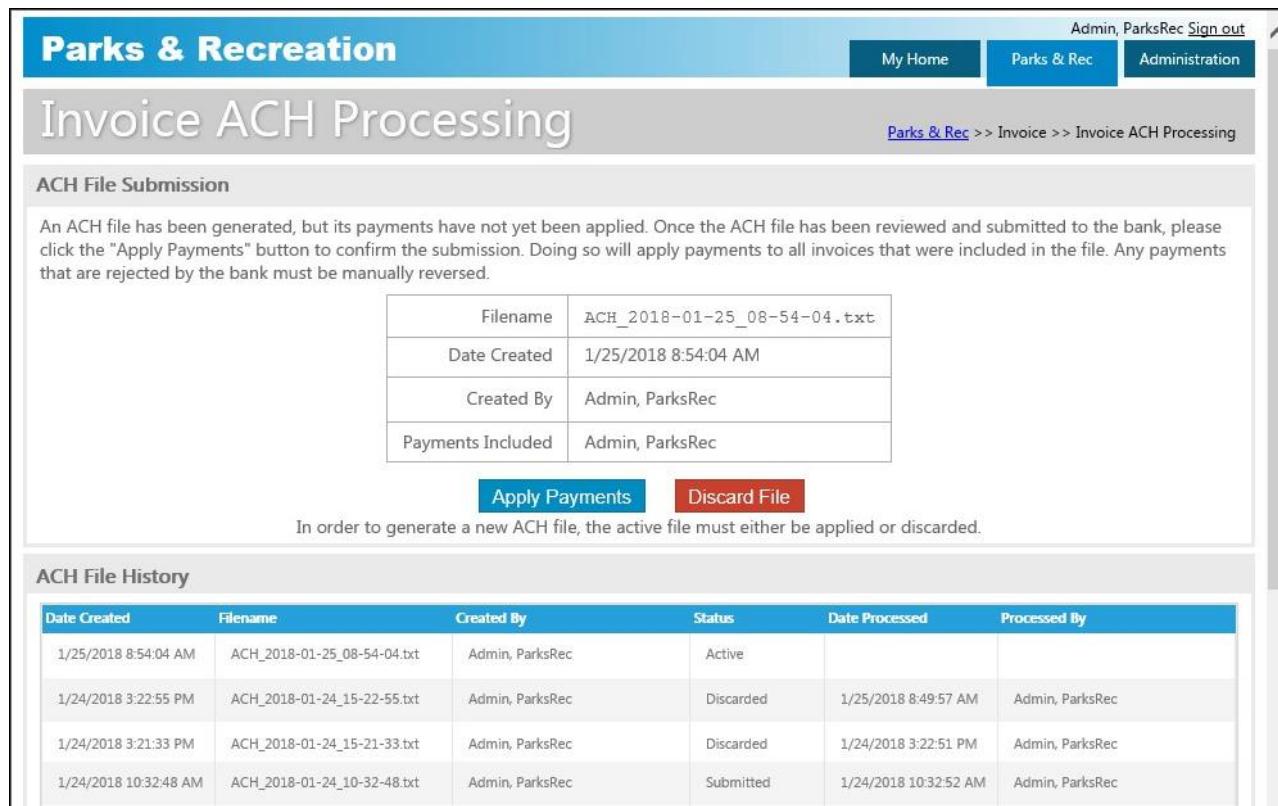
Once the ACH file is generated, you can open or save it.

Do you want to open or save ACH_2018-01-25_08-54-04.zip (3.96 KB) from localhost?

Open Save Cancel X

After reviewing the file, you can submit it to your organization's bank.

The **Apply Payment** button applies payments to all of the invoices that were included in the ACH file.



Parks & Recreation

Invoice ACH Processing

Admin, ParksRec [Sign out](#)

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[Parks & Rec](#) >> [Invoice](#) >> [Invoice ACH Processing](#)

ACH File Submission

An ACH file has been generated, but its payments have not yet been applied. Once the ACH file has been reviewed and submitted to the bank, please click the "Apply Payments" button to confirm the submission. Doing so will apply payments to all invoices that were included in the file. Any payments that are rejected by the bank must be manually reversed.

Filename	ACH_2018-01-25_08-54-04.txt
Date Created	1/25/2018 8:54:04 AM
Created By	Admin, ParksRec
Payments Included	Admin, ParksRec

[Apply Payments](#) [Discard File](#)

In order to generate a new ACH file, the active file must either be applied or discarded.

ACH File History

Date Created	Filename	Created By	Status	Date Processed	Processed By
1/25/2018 8:54:04 AM	ACH_2018-01-25_08-54-04.txt	Admin, ParksRec	Active		
1/24/2018 3:22:55 PM	ACH_2018-01-24_15-22-55.txt	Admin, ParksRec	Discarded	1/25/2018 8:49:57 AM	Admin, ParksRec
1/24/2018 3:21:33 PM	ACH_2018-01-24_15-21-33.txt	Admin, ParksRec	Discarded	1/24/2018 3:22:51 PM	Admin, ParksRec
1/24/2018 10:32:48 AM	ACH_2018-01-24_10-32-48.txt	Admin, ParksRec	Submitted	1/24/2018 10:32:52 AM	Admin, ParksRec

AR Export

When enabled in Integration Settings, the AR Export option creates the invoice export file in the Munis General Billing Invoice Import File Layout format. When you complete the AR Export for Invoices, you can use the Invoice Import program in Munis General Billing to import and then process the charges.

In Integration Settings, if the Charge Code Setting is set to Service–Munis, the export file includes the charge code that was assigned to the fee when it was created.

Invoice Search

Invoice Search creates a set of invoice records that can be exported to Microsoft Excel. The search criteria fields include dates, amounts, payer information, and invoice details.

Parks & Recreation
Admin, ParksRec [Sign out](#)

Invoice Search

[Parks & Rec](#) >> Invoice >> Invoice Search

Search Invoices (−)

Invoiced Start Date	Invoiced End Date	Minimum Amount	Maximum Amount
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Fee Name	Payer Number	Payer Name	Processed By
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Invoice Number	Item Name	Item Number	AR Export Status
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="All"/> ▼

Export

Invoice Number	Invoice Total	Invoice Date	Amount Due	Invoice To	
05-2017-000087	0.00	5/4/2017 2:22:09 PM	0.00	Jackson, Simone	
05-2017-000086	95.00	5/4/2017 2:20:47 PM	95.00	Jackson, Simone	
05-2017-000085	80.00	5/4/2017 1:48:44 PM	80.00	Jackson, Simone	
04-2017-000084	80.00	4/28/2017 10:00:44 AM	80.00	Jackson, Harriett	
04-2017-000083	80.00	4/28/2017 9:46:47 AM	0.00	Jackson, Mary	

◀ Page of 1 ▶ 10 ▼

View 1 - 5 of 5

Once you have defined the invoice, click **Export** to create the export file (.xlsx) of the invoice data.

Invoice Details

When you click the edit button for a specific invoice, the Invoice Details page displays, and indicates the invoiced and unpaid/due amounts. Discounts are included in the Fee Name column and indicated with a negative (-) dollar amount.

Parks & Recreation

Admin, ParksRec Sign out

[My Home](#) [Parks & Rec](#) [Administration](#)

Invoice Details

[Parks & Rec](#) >> Invoice >> Invoice Details

Invoice Number:	06-2017-000089	Invoice Total:	1750.00
Invoiced To:	Matthews, Mary		
Search			

Invoice

Ice Arena 
 Fri, June 30, 2017 12:00pm - 3:00pm
 Location: [Hayward Arena](#)
 15 attending

Fee Name	Invoiced	Unpaid/Due	Payment
General Rental Fee	\$900.00	\$0.00	\$ <input type="text" value="0.00"/>
General Participation Fee (1 at \$250.00 ea.)	\$250.00	\$0.00	\$ <input type="text" value="0.00"/>
General Participation Fee (1 at \$300.00 ea.)	\$300.00	\$0.00	\$ <input type="text" value="0.00"/>
General Participation Fee (1 at \$300.00 ea.)	\$300.00	\$300.00	\$ <input type="text" value="300.00"/>

Payment Total: \$300.00

Payment

Payer  

[Next >](#)

Clicking the + button next to the main item on the invoice opens the Purchase Additional Add-Ons screen, which allows you to purchase additional add-on items available for the class or facility.

Invoice

Ice Arena  + Purchase Additional Add-Ons

Fri, June 30, 2017 8:15 attending

Location: [Hayward Arena](#)

15 attending

Fee Name	Buy	Name	Suppl. Name	Suppl. Data	Quantity	Fee
Rental Registration	<input type="checkbox"/>	Skate Shop			1	\$300.00
Rental Add On	<input type="checkbox"/>	Security Guard			1	\$250.00
Rental Add On						Total Amount: \$0.00

[Purchase](#) [Cancel](#)

To process an invoice payment, select a payer and click Next. The page refreshes to display the Payment Method and Pay options.

Payment

Payment Method
 CustomerCreditCard

Full Split < Back

    Email Receipt?

When you complete the payment, the program provides the Receipt page, allowing you to view the invoice, print the receipt, or to select another purchase option. When an account has a credit, the Invoice Details page includes the credit as an available payment method.

Parks & Recreation
Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

You have paid the invoice successfully. A receipt has been emailed to the payer.

[View Invoice](#) [Print Receipt](#)

Receipt

Transaction Date: 6/22/2017 9:42:06 AM
 Total Amount: \$95.00
 Receipt:
 RECEIPT-06-2017-000063
 Payment Method:
 CustomerCreditCard: \$95.00

Intermediate Yoga - 05-2017-000042	\$80.00
Location: Bartlett School	
Dates: 6/23/2017 - 8/11/2017	
Times: F: 07:00 PM - 08:00 PM	
Registrant: Simone Jackson	
Yoga Mat - Intermediate Yoga	\$15.00
Total: \$95.00	

Paid By:
 Simone Jackson
 One Tyler Drive
 Yarmouth, ME 04096

What Next?

[Main Menu](#)
[Create Class Registration](#)
[Create Rental Registration](#)
[Purchase Add on Item](#)

My Reports

My Reports creates reports of system activity. For a report to be available, you must complete the report setup on the Administration tab.

Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

My Reports

[Parks & Rec](#) >> My Reports >> My Reports

Search Reports [1](#) [2](#)

 **Account Credit Summary**
Application Report
File Name: AccountCredit.rdl

[Run Report](#)

 **Bulk Class Roster**
Application Report
File Name: BulkClassRoster.rdl

[Run Report](#)

 **Class Listing**
Application Report
File Name: ClassListing.rdl

[Run Report](#)

 **Class Revenue Report**
Application Report
File Name: ClassRevenue.rdl

[Run Report](#)

 **Participation Report**
Application Report
File Name: ParticipationReport.rdl

[Run Report](#)

[1](#) [2](#)

When you click **Run Report**, the program displays the Start and End Date boxes for defining the time period for the report. Once you define the dates, the report displays.

Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

My Reports

[Parks & Rec](#) >> My Reports >> My Reports

Search Reports [1](#)

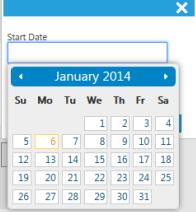
 **Class Listing**
Application Report
File Name: ClassListing.rdl

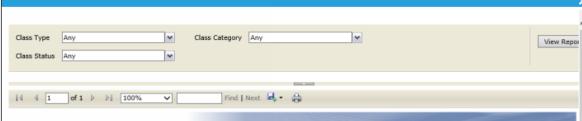
[Run Report](#)

 **Participation Report**
Application Report
File Name: ParticipationReport.rdl

 **Participation Report**
Application Report
File Name: ParticipationReport.rdl

[Run Report](#)

 Start Date: [January 2014](#)
Su Mo Tu We Th Fr Sa
1 2 3 4
5 6 7 8 9 10 11
12 13 14 15 16 17 18
19 20 21 22 23 24 25
26 27 28 29 30 31

 Class Type: Any Class Category: Any
Class Status: Any [View Report](#)

 Tyler Parks & Recreation
Class Listing
Start date: 8/1/2013 End date: 8/30/2013 Class Status: Any Class Type: Any Class Category: Any
Class Code: Class Name: Status: Class Type: Start: End Date: Days of Week: Registered: Waiting:
AT-101 Basic Sketching Active Classroom 10/1/2013 11/15/2013 Mo Tu We 2 0
1-Soccer Soccer Level 1 Active Athletic - Outside 9/6/2013 11/29/2013 4 0
A-Soccer Adult Soccer Active Athletic - Indoor 10/1/2013 1/13/2014 Tu 0 0
HK-101 Hiking Active Classroom 9/2/2013 9/2/2013 Sa 0 0
AY-63-2013 Advanced Yoga Active Health and Fitness 9/9/2013 12/31/2013 Mo We Fr 4 0
06-2013-000003 Adult Soccer Active Athletic - Indoor 9/6/2013 12/31/2013 Tu 4 0
FDS2013 Valentine Flag Football Active Classroom 9/6/2013 11/15/2013 Mo We 0 0
2013-10-01 Whoopee Making Active Classroom 11/15/2013 12/20/2013 1 0
11-2013-000004 Running Active Athletic - Indoor 1/2/2014 4/25/2014 Tu 0 0
12-2013-000009 Soccer Level 1 Active Athletic - Indoor 9/9/2013 11/26/2013 0 0

16/2014 10:48:39 AM Page 1 of 1

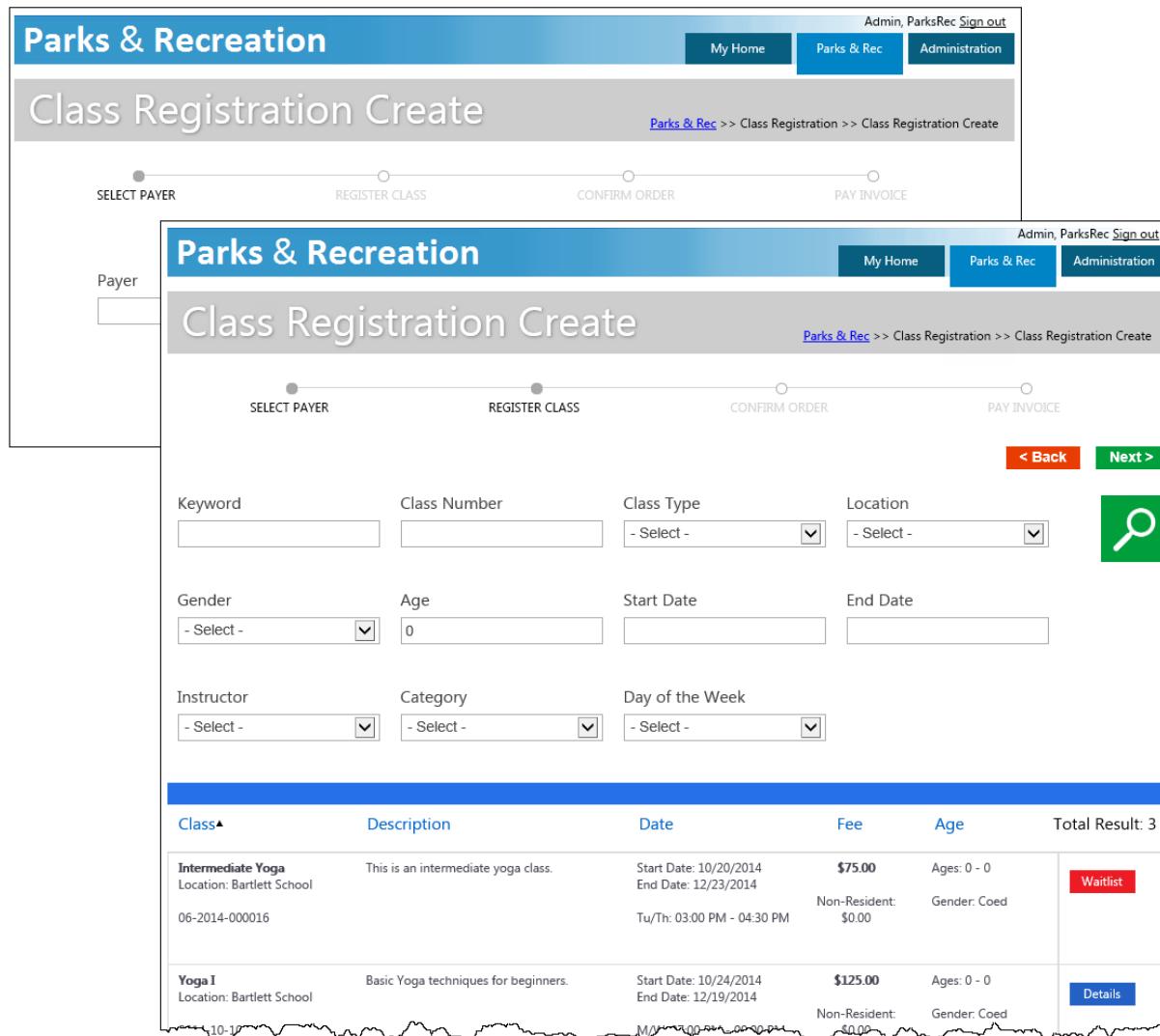
Class Registration

Class Registration allows personnel in your organization to process registrations for community members. Payers are not required to be a registered user; you can select any contact as the payer.

Create

The Class Registration Create page identifies the registrant (payer). Click the **Search** button to select a payer name or manually enter the name. When you are completing the Payer box, you may enter the name in the [First Name Last Name] or [Last Name, First Name] format. After you type at least two characters of the name, the program provides a list of potential matches from which you can select a payer.

When you click **Next**, the Class Registration Create page provides the class search criteria.



Parks & Recreation

Class Registration Create

Parks & Rec >> Class Registration >> Class Registration Create

SELECT PAYER REGISTER CLASS CONFIRM ORDER PAY INVOICE

Payer

Parks & Recreation

Class Registration Create

Parks & Rec >> Class Registration >> Class Registration Create

SELECT PAYER REGISTER CLASS CONFIRM ORDER PAY INVOICE

Keyword Class Number Class Type Location

Gender Age Start Date End Date

Instructor Category Day of the Week

Class Description Date Fee Age Total Result: 3

Intermediate Yoga Location: Bartlett School 06-2014-000016	This is an intermediate yoga class.	Start Date: 10/20/2014 End Date: 12/23/2014 Tu/Th: 03:00 PM - 04:30 PM	\$75.00 Non-Resident: \$0.00	Ages: 0 - 0 Gender: Coed	Waitlist
Yoga I Location: Bartlett School	Basic Yoga techniques for beginners.	Start Date: 10/24/2014 End Date: 12/19/2014	\$125.00 Non-Resident: \$0.00	Ages: 0 - 0 Gender: Coed	Details

If a class offers discounts, “Discounts Available” displays in the Fee column. Hovering over the message displays a list of the discounts available.

Class ▾	Description	Date	Fee	Age	Total Result: 18
Summer Camp Week 1 Location: Johnson Park 07-2018-000449	Testing the formatting. This is a large heading. <ul style="list-style-type: none">• another bullet• and anotherbold <i>italics</i>1. numbered list2. numbered list	Start Date: 2/12/2018 12:00:00 AM End Date: 8/31/2018 12:00:00 AM	\$50.00 Non-Resident: \$60.00 Discounts Available	Ages: 0 - 99 Gender: Coed	Waitlist
Summer Camp Week 10 Location: Johnson Park 07-2018-000443		Start Date: 2/12/2019 12:00:00 AM End Date: 5/31/2019 12:00:00 AM	\$10.00 Non-Resident: \$10.00	Ages: 5 - 99 Gender: Coed	Waitlist
Summer Camp Week 3 Location: Johnson Park 07-2018-000412		Start Date: 2/12/2019 12:00:00 AM End Date: 10/31/2019 12:00:00 AM	\$50.00 Non-Resident: \$60.00 Discounts Available	Ages: 5 - 99 Gender: Coed	Details
Summer Camp Week 4 Location: Johnson Park 02-2016-000363		Start Date: 2/12/2016 12:00:00 AM End Date: 10/31/2055 12:00:00 AM	\$52.00 Non-Resident: \$62.00 City of Tyler Employee Employee Middle Age Multi Family Reduced Discounts Available		Details

Note: The best available discount is applied automatically to a registrant's fee. Existing family class and membership registrations are considered in determining whether a multi-family discount is eligible during a registration.

Once you have identified the class, click **Details** to view the Summary page and complete the registration by verifying the registrant and selecting applicable add-on items. Available discounts are listed on this page, also. For portal users, the discounts link to a pop-up that shows the dollar amount or percentage of each one or, in the case of a multi-family discount, a description of how the discount will be applied.

If your organization uses the registration disclaimer option, the Summary page includes an acknowledge terms check box, along with a link to the terms. You must select the check box to verify that the registrant acknowledges the disclaimer.

Summary

Summer Camp Week 3 07-2018-000412

Total: \$62.00

Add new dependent

Registrant: Beaumont, Charlie | Me | Age:63

Fee: \$60

Start Date: 2/12/2019

End Date: 10/31/2019

Available Discounts: City of Tyler Employee, Employee, Middle Age, Multi Family

Location: Johnson Park

Age Range: 5 - 99

Gender: Coed

Capacity: 1 - 100

Group:

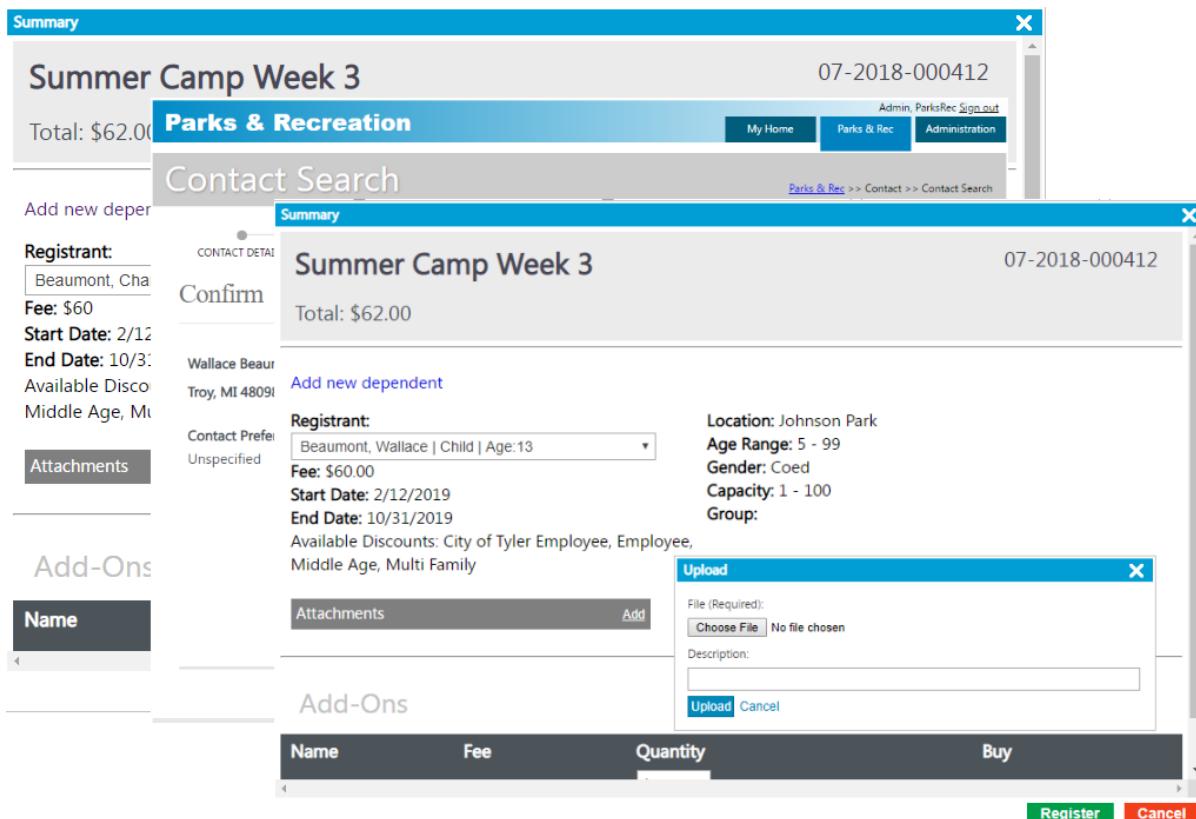
Attachments **Add**

Add-Ons

Name	Fee	Quantity	Buy

Register **Cancel**

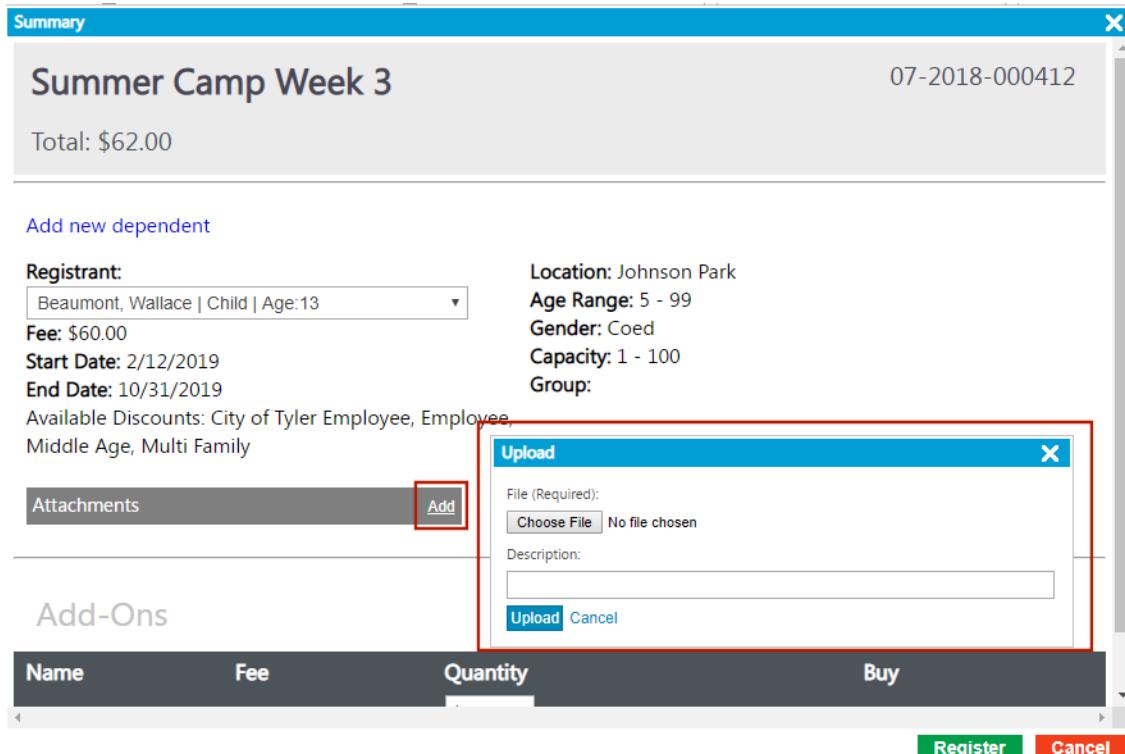
The Add New Dependent option on the Summary page allows you to add a dependent for the selected contact. When you select **Add New Dependent**, the program provides the Contact Detail pages, and then returns you to the Summary page with the dependent available for selection from the Registrant list.



The screenshot shows a registration process for 'Summer Camp Week 3'. The main 'Summary' page displays the total fee of \$62.00. It includes sections for 'Registrant' (Beaumont, Cha), 'Fee' (\$60), 'Start Date' (2/12), 'End Date' (10/31), and 'Available Disco' (Middle Age, MI). The 'Attachments' section is shown. The 'Contact Search' page is also visible, showing the same registration details.

The Summary page also lists available discounts.

Use the Attachments option to add documents (such as a registration form) to the registrant's record.



The screenshot shows the 'Summary' page for 'Summer Camp Week 3' with a total fee of \$62.00. It includes sections for 'Registrant' (Beaumont, Wallace | Child | Age:13), 'Fee' (\$60.00), 'Start Date' (2/12/2019), 'End Date' (10/31/2019), and 'Available Discounts' (City of Tyler Employee, Employee, Middle Age, Multi Family). The 'Attachments' section is highlighted with a red box around the 'Add' button. A file upload dialog box is overlaid on the page, prompting for a file to be chosen and providing a description field and 'Upload' button.

If a selected registrant is already registered in the selected class, the program displays the “The registrant is in class” message in the summary information.

When you click **Register**, the program displays a confirmation box. Click **Continue Shopping** to complete additional registrations or click **Checkout** to complete the current registration.

When you click **Checkout**, the program displays a summary page.

Parks & Recreation Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Class Registration Create

[Parks & Rec](#) >> Class Registration >> Class Registration Create

SELECT PAYER REGISTER CLASS CONFIRM ORDER PAY INVOICE

Registration Date: 08/03/2018 Payer: Beaumont, Charlie Total Cost: \$56.00

Registants: Beaumont, Wallace

07-2018-000412 - Summer Camp Week 3
 Location: Johnson Park
 Class Type: Camp
 Class Dates: 02/12/2019 - 10/31/2019
 Class Hours:
 0 Attachments

Class Price: \$60.00
 Add-Ons Cost: \$2.00 
 City of Tyler Employee: -\$6.00
 Total: \$56.00

[< Back](#) [Next >](#)

If all the details are correct, click **Next** to continue to the Payment page, where you can specify the payment method and select **Pay Now, Invoice** or **Cashiering**. If account credit is a valid payment method for the class type, the Payment Method list includes the Account Credit option. In this case, if the payer has an account credit available, the credit can be selected as a payment method.

Note: If a discount has been applied, the amount is shown as a subtraction in the Order Summary section.

Class Registration Create

[Parks & Rec](#) >> Class Registration >> Class Registration Create

SELECT PAYER REGISTER CLASS CONFIRM ORDER PAY INVOICE

Order Summary

Invoice To: Beaumont, Charlie

 Beaumont, Wallace : 07-2018-000412 - Summer Camp Week 3 - Camp - Johnson Park
 02/12/2019 - 10/31/2019

Fee for Summer Camp Week 3: Fee for summer camps	1	\$60.00
City of Tyler Employee		-\$6.00
Subtotal		\$ 54.00
No Class Add On, Class Add On Add-Ons fee for Summer Camp Week 3	1	\$ 2.00
Total: \$56.00		

Payment

 Full Split/Partial

Payment Method

Cash

[Pay Now](#) [Invoice](#) [Cashiering](#)
 Email Receipt?

[< Back](#)

Note: On this page, an administrator can modify any fees associated with the class registration prior to payment.

If a class is free, only the **Register Now** button is enabled in the **Payment** section.

Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Class Registration Create

[Parks & Rec](#) >> Class Registration >> Class Registration Create

SELECT PAYER REGISTER CLASS CONFIRM ORDER PAY INVOICE

Order Summary

Invoice To: Beaumont, Charlie

Beaumont, Charlie : 311604 - Coaching Clinic - Flag Football - Field House
06/08/2018 - 06/12/2020

Fee for Coaching Clinic: Flag Football Fee	1	\$0.00
Subtotal		\$ 0.00
		Total: \$0.00

Payment

Register Now

Email Receipt?

[< Back](#)

Split/Partial Payments

In the Payment Group, the Full and Split/Partial payment options are available. If the customer chooses to split the registration fee into more than one payment, select **Split/Partial**. The page refreshes to provide additional payment fields, and the program requires you to confirm that partial payment is being taken. The partial payment is applied to the registration, and any remaining balance is invoiced.

When an account has a credit that is less than the total amount due, the payment type automatically changes to Split/Partial payment so that the account credit can be used. If you select Full as the payment type, the Account Credit option is not available in the Payment Method field. The Full payment option remains available, and when it is selected, the options for Invoice and Tyler Cashiering (if applicable) are available.

If you select **Pay Now**, and the Email Receipt? check box is selected, the program sends a copy of the receipt to the email address provided. It also makes a printable payment receipt available. If you select **Invoice**, the program displays an invoice confirmation.

Parks & Recreation

Class Registration Create

Parks & Rec >> Class Registration >> Class Registration Create

You have registered and paid the invoice successfully. A receipt has been emailed to the payer.

New Registration Main Menu Print

Pay Now
Invoice

Receipt

Receipt #: RECEIPT-03-2014-000015

Recreational Soccer - Int

03-2014-000013

Location: Hayward Field

Dates: 5/1/2014 - 7/25/2014

Times: M/W: 06:30 PM - 08:30 PM

Registrant: Patrick Smith

Paid By:
Patrick Smith
123 Tyler Drive
Yarmouth, ME 04096

Payment Method: Cash

Total: \$80.00

Parks & Recreation

Class Registration Create

Parks & Rec >> Class Registration >> Class Registration Create

You have registered and invoiced successfully.

New Registration Main Menu

Note: Payment method records with associated general ledger accounts must be available to process payments.

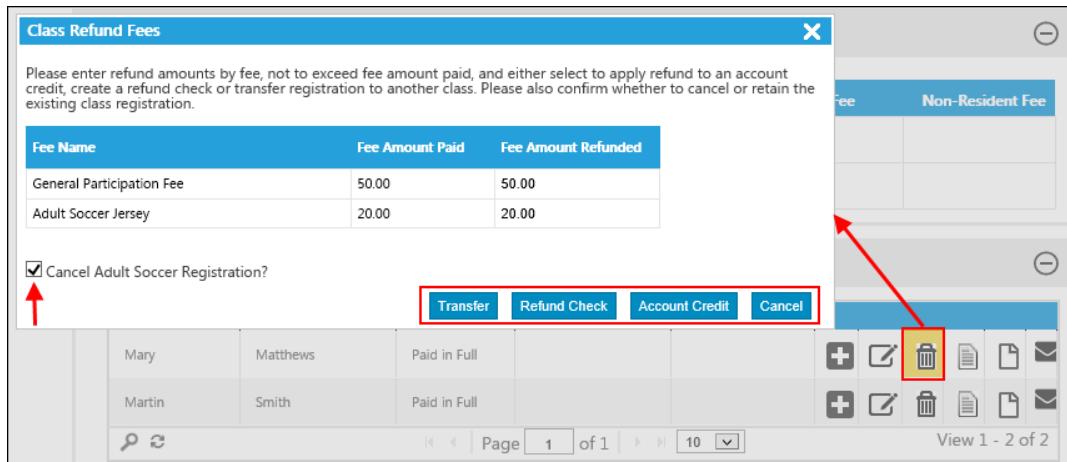
Waitlists

For classes set up to allow waitlists, you can move waitlist registrants to the class registration list as space becomes available. Use the Class Details page to move a contact from a waitlist to a class registration list. When you do so, the program provides the payment options.

An auto add check box is available in System Settings to let you set up to have registrants moved automatically from the waitlist to a registrant position when space becomes available. (See the “System Settings” section in this guide.)

Class Registration Refunds

When a customer requests that a paid class registration be refunded and you delete the registrant from the Registrants group on the Class Details page, the Class Refund Fees dialog box provides options for processing the payer’s refund. The Fee Amount Refunded displays the fee amount paid for the activity, but you can edit this amount to be less than (but not greater) than the paid amount.



Please enter refund amounts by fee, not to exceed fee amount paid, and either select to apply refund to an account credit, create a refund check or transfer registration to another class. Please also confirm whether to cancel or retain the existing class registration.

Fee Name	Fee Amount Paid	Fee Amount Refunded
General Participation Fee	50.00	50.00
Adult Soccer Jersey	20.00	20.00

Cancel Adult Soccer Registration?

Transfer Refund Check Account Credit Cancel

Mary Matthews Paid in Full
Martin Smith Paid in Full

View 1 - 2 of 2

The refund options are:

- Transfer—Transfers the refund amount to a new registration. This option is not available when the Cancel <Class Name> Registration check box is not selected.
- Refund Check—Submits the refund to check processing.
- Account Credit—Stores the credit balance with the contact record to be used for a rental or class registration. This option is only available when the pay method for the class activity is set up to include the account credit processing.

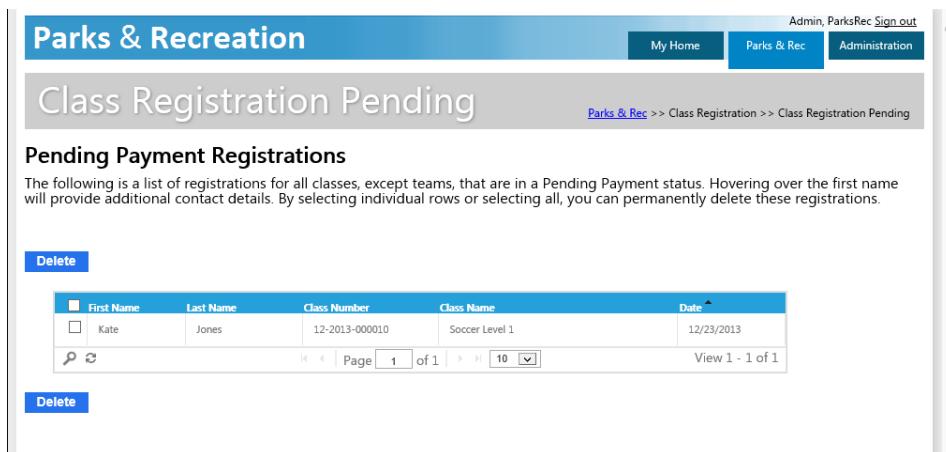
The Cancel <Class Name> Registration? check box directs the program to cancel the registration in addition to issuing the refund. If you clear this check box, the Class Refund Fees dialog box refreshes to remove the Transfer option. In this case, the refund is processed, but the class registration remains active.

When you use a credit to pay for a class activity and the class fee is less than the credit, the activity fee is deducted from the account credit and the remaining amount is refunded. If you register for an activity using the citizen portal and the credit balance is not great enough to cover the activity fee, you can select the split pay option and define the payment amount for the outstanding balance.

Note: If a registrant with a credit balance creates a new registration using the citizen portal and the credit balance does not cover the entire registration fee, the payment page automatically indicates a split payment with credit card tender type specified as the payment method for the remaining balance. The registrant cannot change this; he or she must complete the credit card options to complete the payment.

Pending Registrations

Class Registration Pending provides a list of registrations for all classes for which payment is pending. (Teams are excluded.) The details provided include the registrant's name, the class number, class name, and class date. Hover your pointer over the registrant's name for address and contact information.



First Name	Last Name	Class Number	Class Name	Date
<input type="checkbox"/> Kate	Jones	12-2013-000010	Soccer Level 1	12/23/2013

To delete one or more registrations, select the check boxes for the registrations and click **Delete**.

Rental Registration

Rental Registration allows personnel within your organization to complete rental transactions. In order to be eligible for rental registration, renters/payers must have active contact records with the Registrant check box selected.

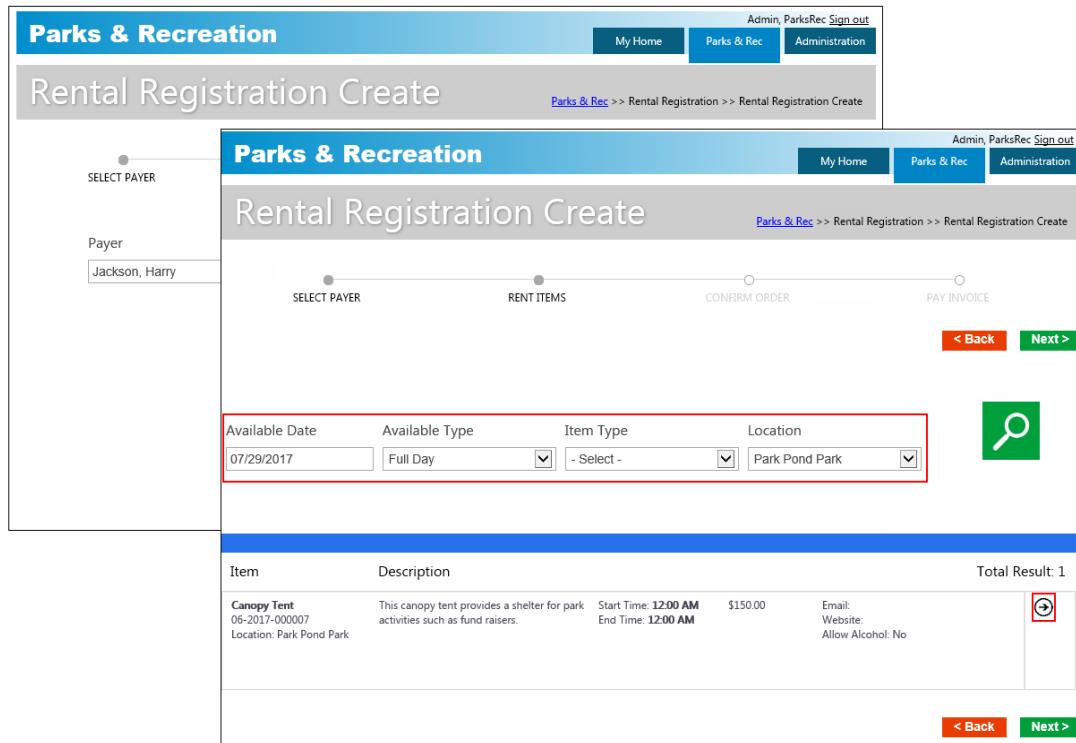
The Rental Registration Approvals page is available for managing the approval process for rental facilities or items for which approval is required.

Records for rental items are maintained using the Rental Item option.

Create

The Rental Registration Create page identifies the renter/payer. Click the **Search** button to select a payer name or manually enter the name. When you are completing the Payer box using the last name, first name format, and you have typed at least two characters of the last name, the program provides a list of potential matches from which you can select a payer.

Click **Next** to identify the rental date and item. The Available Date is a required field. Once you have entered the rental item criteria, click the **Search** button to display the items matching the criteria.



Parks & Recreation

[Parks & Rec](#) >> Rental Registration >> Rental Registration Create

Parks & Recreation

[Parks & Rec](#) >> Rental Registration >> Rental Registration Create

Available Date: 07/29/2017 | Available Type: Full Day | Item Type: - Select - | Location: Park Pond Park

Item: Canopy Tent (06-2017-000007) Description: This canopy tent provides a shelter for park activities such as fund raisers. Start Time: 12:00 AM End Time: 12:00 AM Total Result: 1

For the item you are renting, click the select button to display the Summary page.

Summary

Canopy Tent		06-2017-000007								
Total: \$150.00										
Fee: \$150.00 Location: Park Pond Park Start Time: 12:00 AM End Time: 12:00 AM Type: Equipment	Available Type: Full Day Website: Email: Allow Alcohol: No Maximum Occupancy: 50 Minimum Days Booked in Advance: 0 Maximum Days Booked in Advance: 0									
<input type="button" value="Attachments"/> <input type="button" value="Add"/>										
Number Of Attendees <input type="text" value="40"/>										
Add-Ons <table border="1"> <thead> <tr> <th>Name</th> <th>Fee</th> <th>Quantity</th> <th>Buy</th> </tr> </thead> <tbody> <tr> <td>Celebration Flags</td> <td>\$15.00</td> <td><input type="text" value="1"/></td> <td><input type="button" value=""/></td> </tr> </tbody> </table>			Name	Fee	Quantity	Buy	Celebration Flags	\$15.00	<input type="text" value="1"/>	<input type="button" value=""/>
Name	Fee	Quantity	Buy							
Celebration Flags	\$15.00	<input type="text" value="1"/>	<input type="button" value=""/>							
Description: <small>This canopy tent provides a shelter for park activities such as fund raisers.</small>										
<input type="button" value="Register"/> <input type="button" value="Cancel"/>										

On this page, enter any supporting information in the fields provided, add attachments, select any applicable add-ons, and then click **Register** to continue.

The program verifies that the rental meets the rental item requirements. For example, if you are renting a facility, you must enter the number of attendees and the program verifies that this number is not greater than the Maximum Occupancy number defined for the rental facility.

If an approval is required to rent the facility or item, the registration record is automatically set to a status of Tentative, and the Approval Status is Pending Approval. Rental approvals are managed on the Rental Registration Approvals page.

If a registration disclaimer is associated with the rental item, the Summary page includes an acknowledgement disclaimer check box, along with a link to the terms. You cannot complete the registration process until you select the check box to verify that the registrant acknowledges the disclaimer.

The program displays a confirmation message. Click **Continue** to complete another rental registration or click **Checkout** to complete the current order.

When you click **Checkout**, the program displays a summary page for review and payment.

Rental Registration Create

Parks & Rec >> Rental Registration >> Rental Registration Create

SELECT PAYER RENT ITEMS CONFIRM ORDER PAY INVOICE

[< Back](#)

Order Summary

Invoice To: Jackson, Harry

06-2017-000007 - Canopy Tent

7/29/2017 12:00:00 AM - 7/29/2017 12:00:00 AM

Fee for Canopy Tent: Deposit for rental facilities.	1	\$ 150.00
General Rental Fee, Class Add-Ons fee for Canopy Tent	1	\$ 15.00
Total: \$165.00		

Payment

●Full ○Split/Partial

Payment Method Receipt for Expense

Cash

VISA MasterCard American Express DISCOVER Email Receipt?

In the Payment group, specify the payment details and select Pay Now or Invoice. For payment now, select Email Receipt to receive the registration receipt at your designated email address.

Rental Registration Create

Parks & Rec >> Rental Registration >> Rental Registration Create

SELECT PAYER RENT ITEMS CONFIRM ORDER PAY INVOICE

[< Back](#)

Order Summary

Invoice To: Jackson, Harry

06-2017-000007 - Canopy Tent

7/29/2017 12:00:00 AM - 7/29/2017 12:00:00 AM

Fee for Canopy Tent: Deposit for rental facilities.	1	\$ 150.00
General Rental Fee, Class Add-Ons fee for Canopy Tent	1	\$ 15.00
Total: \$165.00		

Payment

→ ●Full ○Split/Partial

Payment Method Receipt for Expense

VISA MasterCard American Express DISCOVER Email Receipt?

The Payment page provides the option for paying now or receiving an invoice for the payment. If account credit is a valid payment method for the rental, the Payment Method list includes the

Account Credit option. In this case, if the payer has an account credit available, the credit can be selected as a payment method.

If approval is required for a rental reservation and the approval is at the Pending status, the program does not allow you to accept payment on the reservation.

On the Payment page, an administrator can modify fees associated with the rental registration prior to payment.

Click **Pay Now** or **Invoice** to complete the registration. If you select Pay Now, the program displays a printable receipt page; if you select Invoice, the program displays a confirmation page from which you can view the invoice, print the confirmation, or choose to complete other registrations or purchases.

If the rental fees are set up to accept customer credits as payment, the Account Credit option is available from the Payment Method list and you can apply the credit to the rental fee. If the credit amount does not cover the total rental fee, the split payment option is automatically assigned to the payment and you must complete payment processing for the remaining balance.

Split/Partial Payments

In the Payment Group, the Full or Split/Partial options are available. If the customer chooses to split the rental fee into more than one payment, select **Split/Partial**. The page refreshes to provide additional payment fields.

<h1>Payment</h1>		<input type="radio"/> Full <input checked="" type="radio"/> Split/Partial	
pay. method	pay. amount	suppl. data	value
Cash	\$ 1450.00	Receipt for Expense	<input type="text"/>
CustomerCreditCard	\$ <input type="text"/>	Pay Now Invoice	
Bal: \$0.00	Total: \$1450.00	   <input checked="" type="checkbox"/> Email Receipt?	

The program requires you to confirm that partial payment is being taken. The partial payment is applied to the rental, and any remaining balance is invoiced.

Rental Registration Details

For completed registrations, the Rental Registration Details page provides a summary of the registration, including the rental number, status, and amount paid or invoiced, along with the rental facility or item details. If a renter has made a partial payment, the entry for the rental contains two rows: one for the partial payment and one for the total invoice.

When you hover your pointer over the Amount Paid and Invoiced fields, the program displays receipt details (if available).

Parks & Recreation

Admin, ParksRec Sign out

Rental Registration Details

Parks & Rec >> Rental Registration >> Rental Registration Details

rental number: RNTL-02-2014-000008 rental status: Confirmed

(
)
Search
Save

General
Custom
Documents
History

Setup

Renter: () () ()

Rental Number:

Status: ()

Description:

Refund
Pay Rental

Paid: \$1200.00

Invoiced: \$2100.00

Receipt Number: RECEIPT-09-2015-000046

Transaction Date: 09/23/2015

Registrant: Jackson Hill

Paid By: Jackson Hill

Payment Method: Cash

Amount: \$1,200.00

Details

StartDate:

EndDate:

Number Of Attendees:

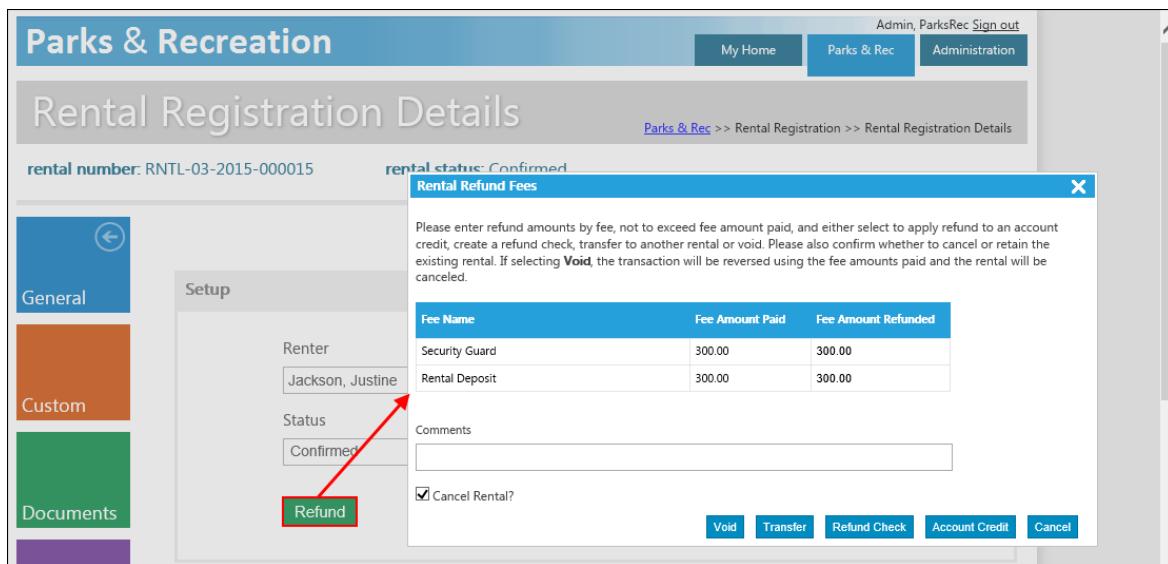
Location:

To refund paid amounts directly from the Rental Registration Details page, click **Refund** to initiate the refund process. Refund options vary according to the refund permissions assigned to your user role.

When you click **Refund**, the program displays the Rental Refund Fees dialog box, which provides the available refund options. The Fee Amount Refunded field displays the fee amount paid and available for refund. You can edit this value to an amount less than (but not greater than) the defined amount.

Tyler Parks and Recreation 2018.3

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Parks & Recreation

Rental Registration Details

rental number: RNTL-03-2015-000015 rental status: **Confirmed**

Please enter refund amounts by fee, not to exceed fee amount paid, and either select to apply refund to an account credit, create a refund check, transfer to another rental or void. Please also confirm whether to cancel or retain the existing rental. If selecting **Void**, the transaction will be reversed using the fee amounts paid and the rental will be canceled.

Fee Name	Fee Amount Paid	Fee Amount Refunded
Security Guard	300.00	300.00
Rental Deposit	300.00	300.00

Comments:

Cancel Rental?

Refund

Cancel

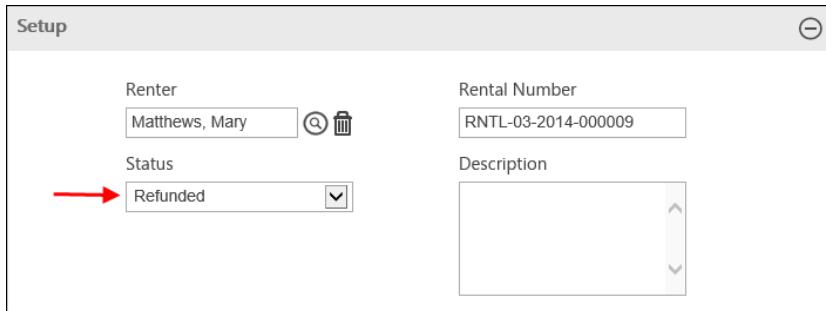
Refund options are:

- **Void**—Reverses the transaction and cancels the registration. If you select this option, the program displays a confirmation message confirming the void of the entire transaction. If you continue, the action voids the entire transaction and removes all rental registrations associated with that transaction.
- **Transfer**—Transfers the refund amount to a new registration. This option is not available when the Cancel Rental check box is not selected.
- **Refund Check**—Submits the refund to check processing.
- **Account Credit**—Stores the credit balance with the contact record to be used for a rental or class registration. This option is only available if the pay method defined for the fee includes the Account Credit option.

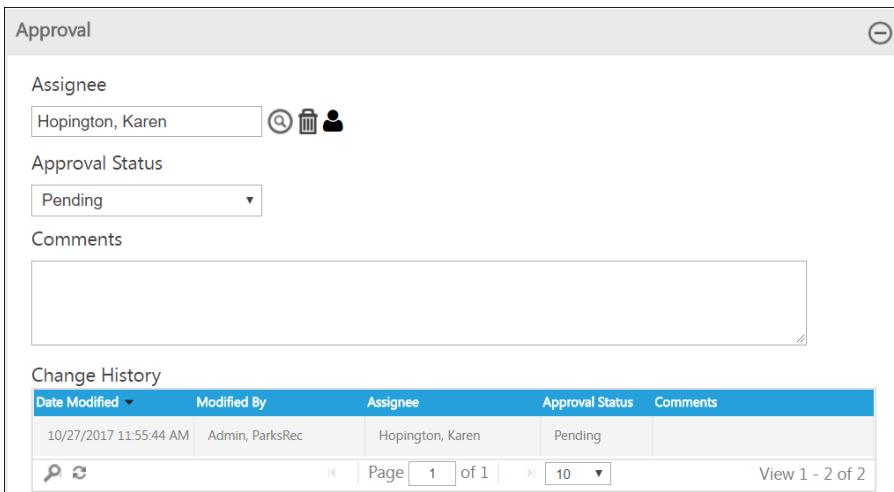
The Cancel Rental check box directs the program to cancel the registration in addition to issuing the refund. If you clear this check box, the Rental Refund Fees dialog box refreshes to remove the Transfer option. In this case, the refund is processed, but the rental registration remains active.

When you use a credit to pay for a rental and the rental fee is less than the credit, the activity fee is deducted from the account credit and the remaining amount is refunded. If you register for an activity using the citizen portal and the credit balance is not great enough to cover the activity fee, you can select the split pay option and define the payment amount for the outstanding balance.

When you complete the refund, the Status field on the Rental Registration Details page resets to Refunded and the **Refund** button is no longer available.



The Approvals section of the Rental Registration Details page allows you to manage the approval process for rentals of facilities or items that require an approval. An authorized administrator can assign the approval process to the appropriate staff member, who can approve or reject the reservation using the Approval Status field.



Date Modified	Modified By	Assignee	Approval Status	Comments
10/27/2017 11:55:44 AM	Admin, ParksRec	Hopington, Karen	Pending	

The Rental Registration Details page also allows you to complete payment on a rental. To initiate the registration payment process directly from the Rental Registration Details page, click **Pay Rental**.

Rental Registration Details

Parks & Rec >> Rental Registration >> Rental Registration Details

rental number: RNTL-02-2014-000008 rental status: Tentative

General Custom Documents History

Setup

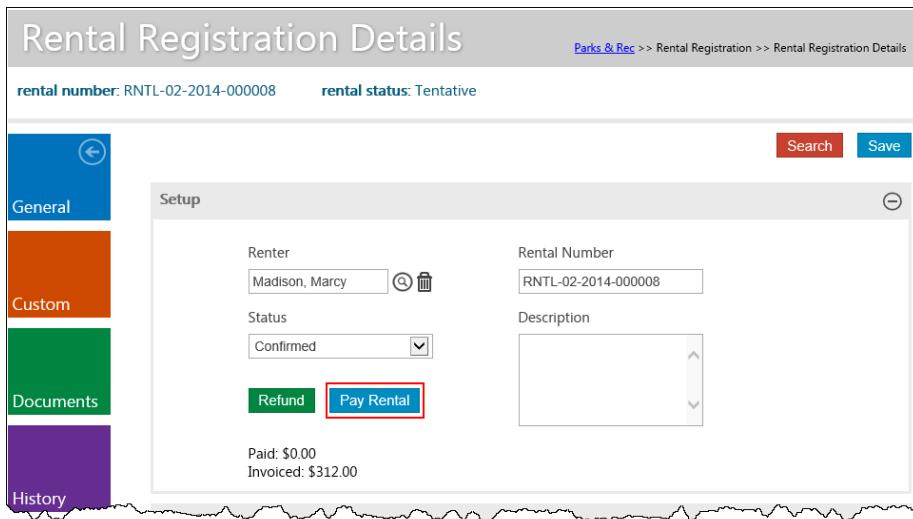
Renter: Madison, Marcy Rental Number: RNTL-02-2014-000008

Status: Confirmed

Refund **Pay Rental**

Paid: \$0.00 Invoiced: \$312.00

Search Save

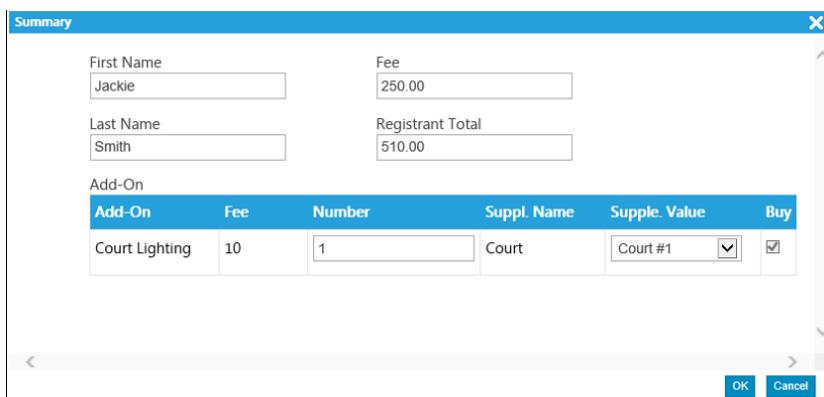


When you click **Pay Rental**, the program displays the Summary box, from which you can select or cancel add-on items for the rental.

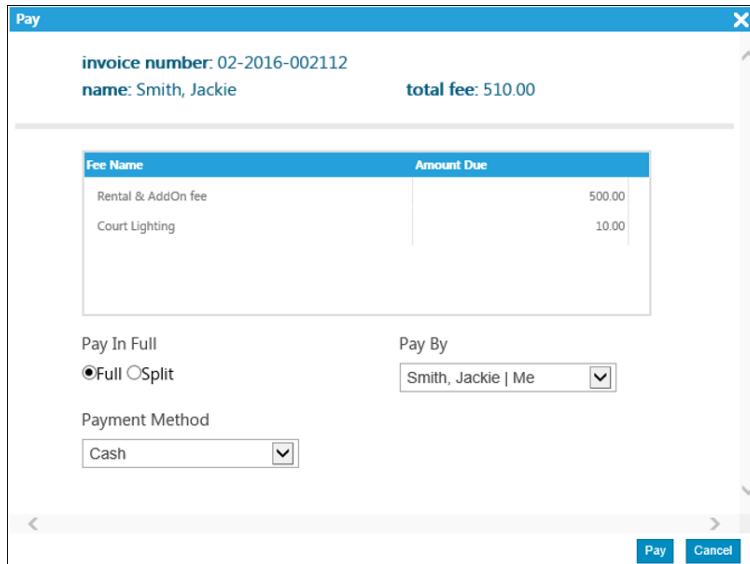
Summary

First Name: Jackie	Fee: 250.00				
Last Name: Smith	Registrant Total: 510.00				
Add-On					
Add-On	Fee	Number	Suppl. Name	Suppl. Value	Buy
Court Lighting	10	1	Court	Count #1	<input checked="" type="checkbox"/>

OK Cancel

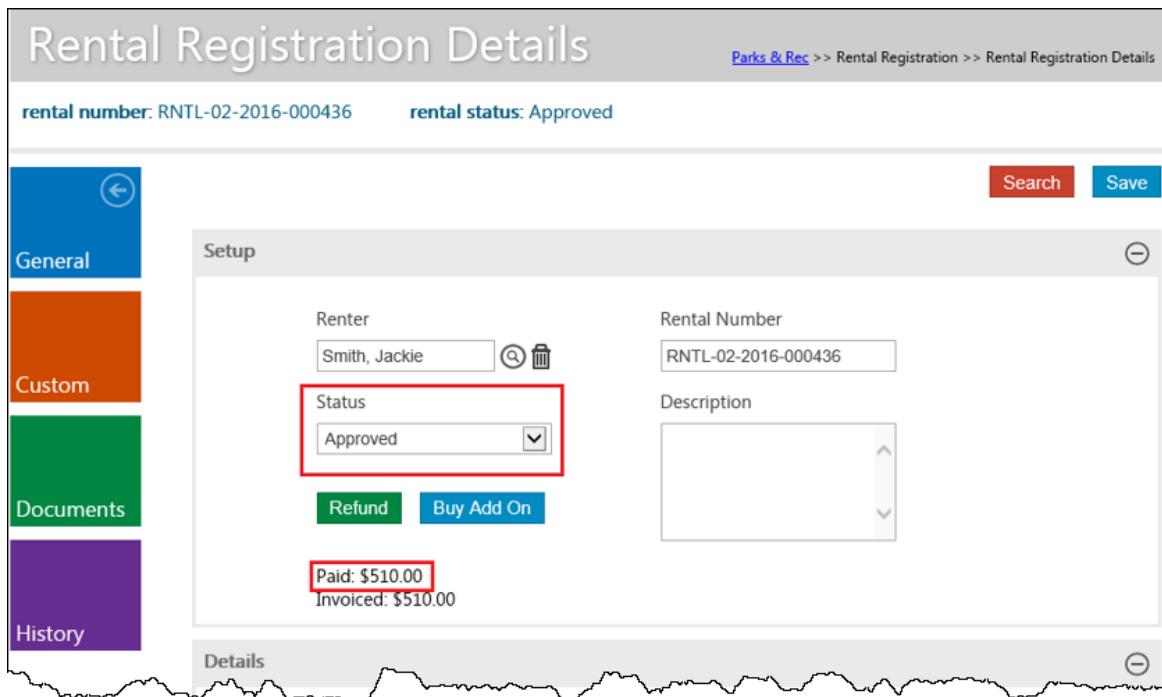


When you click **OK**, the program displays the Payment dialog box.

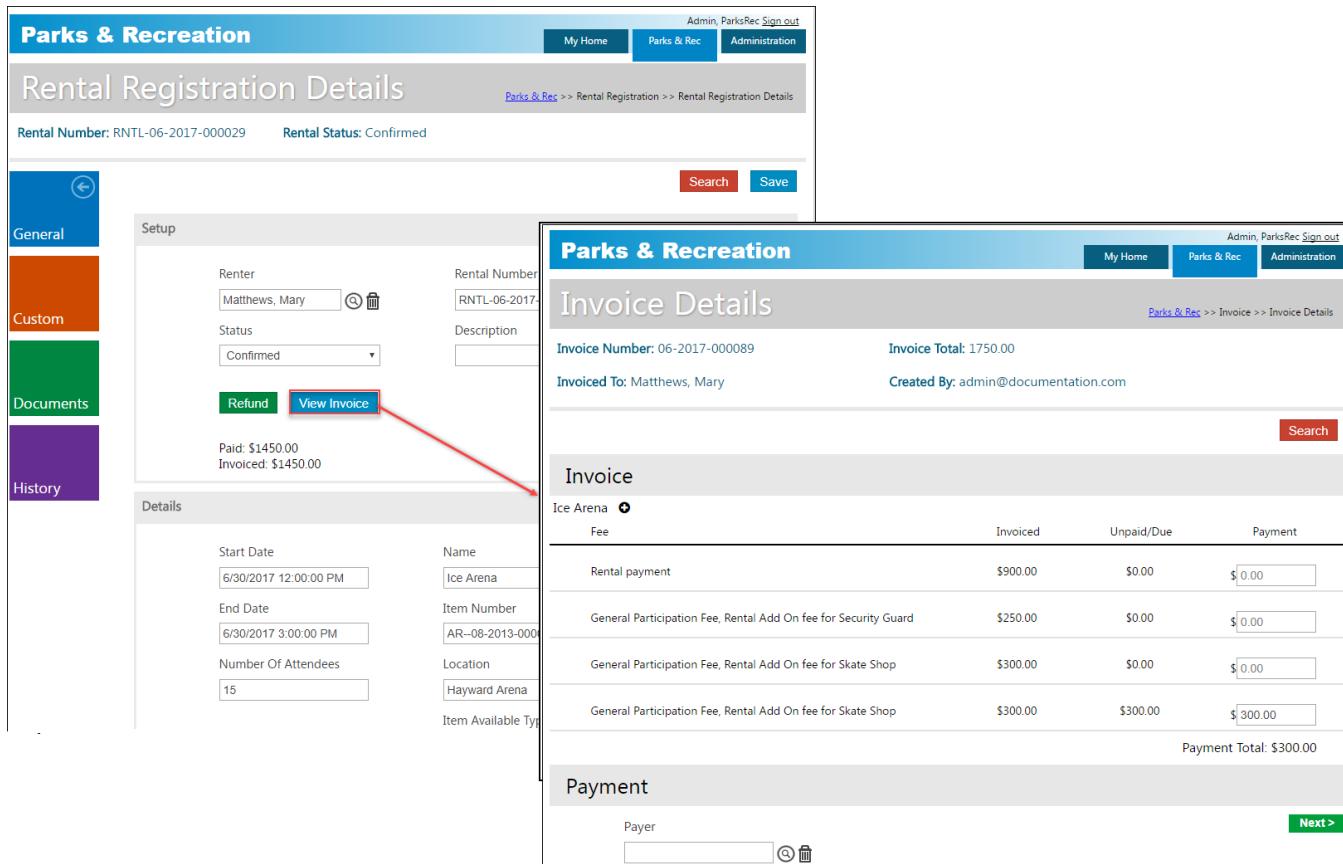


Verify the payment details and click **OK**.

The program returns to the Rental Registration Details page, and the Status of the rental is updated to Approved.



When you complete a rental registration for which you issue an invoice, the Registration Details page provides the View Invoice option. When you click this option, the Invoice Details page displays the invoiced item or items, and allows to you make payments for any outstanding amounts. Registrants can make continuous payments until the invoice is paid in full.



Parks & Recreation

Rental Registration Details

Rental Number: RNTL-06-2017-000029 Rental Status: Confirmed

General Custom Documents History

Setup

Renter: Matthews, Mary Rental Number: RNTL-06-2017-000029

Status: Confirmed Description:

Refund **View Invoice**

Paid: \$1450.00 Invoiced: \$1450.00

Details

Start Date: 6/30/2017 12:00:00 PM Name: Ice Arena

End Date: 6/30/2017 3:00:00 PM Item Number: AR-08-2013-0001

Number Of Attendees: 15 Location: Hayward Arena

Item Available Type:

Parks & Recreation

Invoice Details

Invoice Number: 06-2017-000089 Invoice Total: 1750.00

Invoiced To: Matthews, Mary Created By: admin@documentation.com

Search

Invoice

Ice Arena

Fee	Invoiced	Unpaid/Due	Payment
Rental payment	\$900.00	\$0.00	\$0.00
General Participation Fee, Rental Add On fee for Security Guard	\$250.00	\$0.00	\$0.00
General Participation Fee, Rental Add On fee for Skate Shop	\$300.00	\$0.00	\$0.00
General Participation Fee, Rental Add On fee for Skate Shop	\$300.00	\$300.00	\$300.00

Payment Total: \$300.00

Payment

Payer:

Next >

If there are add-on items available for an invoiced item, click the expand (+) button for the item to view the add-on selections. You can process the purchase of add-on items directly from this page.

Purchase Additional Add-Ons

The add-on items you select for purchase will be added to your invoice.

Buy Name	Suppl. Name	Suppl. Data	Quantity	Fee
<input type="checkbox"/> Skate Shop			1	\$300.00
<input type="checkbox"/> Security Guard			1	\$300.00

Total Amount: \$0.00

Purchase Cancel

Rental Registration Approvals

Rental registrations for facilities or items that require an approval are displayed on the Rental Registration Approvals page. Newly-created rental registrations that require approval are automatically set to an Approval Status of Pending. An approval is required for a rental when the Require Approval check box is selected in the Rental Item record for a facility or item. To make rentals that require approval available on the citizen portal, the Allow Invoicing On Portal option also must be enabled in Portal Settings.

Selecting the Show Unassigned Only option in the search criteria limits search results to rental registrations that require approval, but for which no approver has been assigned.

Parks & Recreation Admin, ParksRec Sign out

Rental Registration Approvals Parks & Rec >> Rental Registration >> Rental Registration Approvals

Search Rental Registration Approvals

Keyword	Approval Status	Rental Item	Location	<input type="button" value="Search"/>
<input type="text"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>	
Assignee	Start Date	End Date	<input checked="" type="checkbox"/> Show Open Only <input type="checkbox"/> Show Unassigned Only	
<input type="text"/> <input type="button" value="Clear"/>	<input type="text"/>	<input type="text"/>		

Export

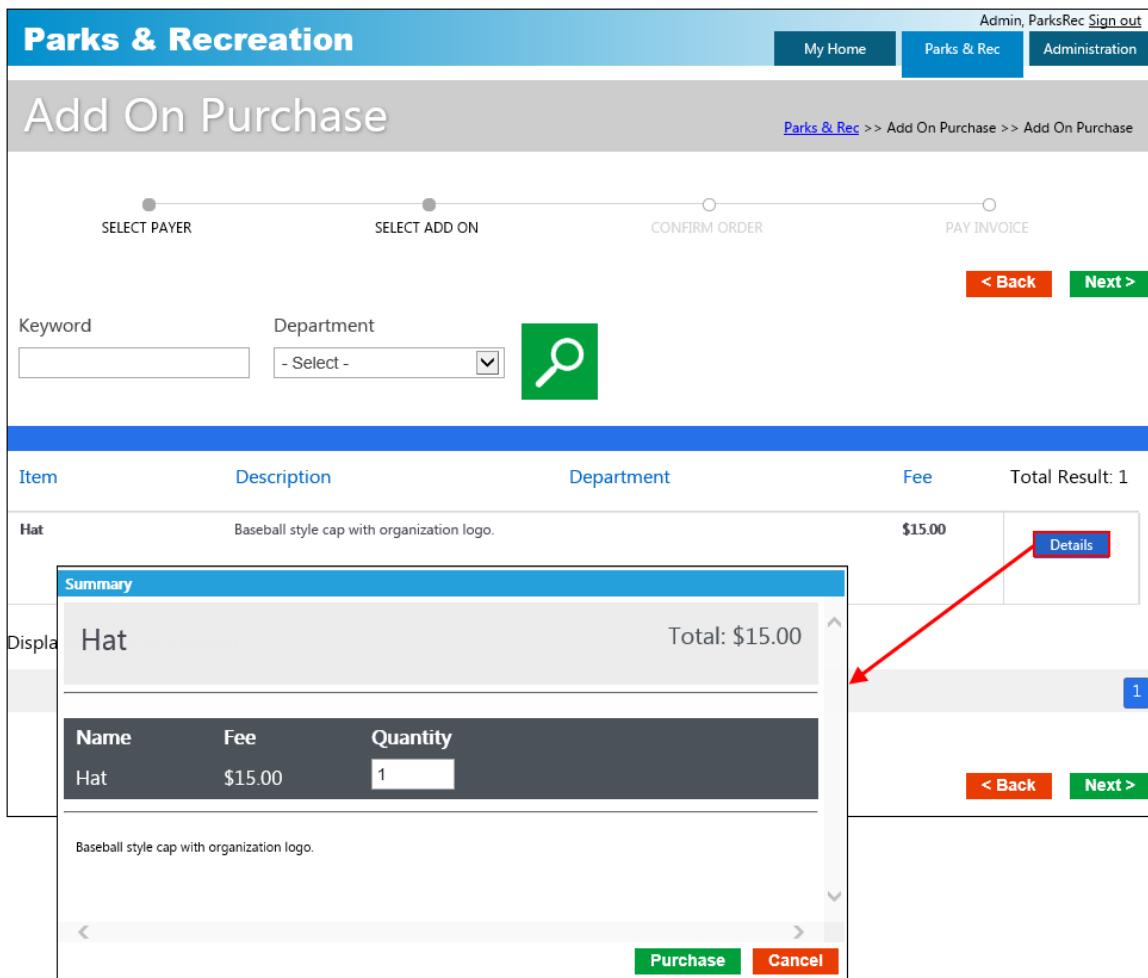
Rental Number	Rental Item	Renter	Start Date	End Date	Approval Status	Assignee	Edit
RNTL-10-2017-000033	Tennis Court	Jackson, Marilyn	11/18/2017 1:00:00 AM	11/18/2017 2:00:00 AM	Pending	Hopington, Karen	<input checked="" type="checkbox"/>
RNTL-10-2017-000032	Ice Arena	Tyler, Jason	11/13/2017 10:00:00 AM	11/13/2017 11:00:00 AM	Pending		<input checked="" type="checkbox"/>

Page of 1 10 View 1 - 2 of 2

Clicking the Edit button for an individual rental registration opens the Rental Registration Details. The Approvals section of Rental Registration Details allows staff members to manage the approval process for the rental reservation.

Add On Purchase

Add-on items that have been designated for individual sale can be sold independently of a class or rental. Clicking the **Create** button opens the Add On Purchase process. You can select a payer (this step is optional). After you select the add-on item being purchased, click the **Details** button to add the item to the cart and complete the payment.



Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Add On Purchase

Parks & Rec >> Add On Purchase >> Add On Purchase

SELECT PAYER SELECT ADD ON CONFIRM ORDER PAY INVOICE

< Back [Next >](#)

Keyword Department 

Item **Description** **Department** **Fee** **Total Result: 1**

Item	Description	Department	Fee	Total Result: 1
Hat	Baseball style cap with organization logo.		\$15.00	Details

Display [Summary](#)

Summary

Hat			Total: \$15.00
Name	Fee	Quantity	
Hat	\$15.00	1	

Baseball style cap with organization logo.

Purchase [Cancel](#)

To refund an add-on purchase, locate the record for the purchase, and click the **Delete** button. The refund options available for add-on purchases are:

- Void—Reverses the transaction and cancels the registration. If you select this option, the program displays a confirmation message confirming the void of the entire transaction. If you continue, the action voids the entire transaction and removes all rental registrations associated with that transaction.
- Refund Check—Submits the refund to check processing.

Add-on fees are assigned when the add-on records are created, but you can adjust the add-on fee for a specific transaction.

Rental Item

Rental Item maintains records for rental items, for example, facilities or specialized activity items. Rental item records store the item, location, status, and associated rental fees.

Setup

The Setup fields provide the description, type, location, time buffers for setup and take down and associated fees for the item.

Setup

Name	Registration Start
Canopy Tent	
Item Type	Registration Deadline
Equipment	
Item Status	Fee
Open	150.00
Location	Non Resident Fee
Park Pond Park	175.00
Available Type	Fee Template
Play	- Select -
<input checked="" type="checkbox"/> Show on Portal	
<input checked="" type="checkbox"/> Allow Portal Registration	
Maximum Occupancy	
50	
Maximum Days Booked in Advance	
0	
Minimum Days Booked in Advance	
0	
Description 	
This canopy tent provides a shelter for park activities such as fund raisers. 	
Registration Receipt Note 	

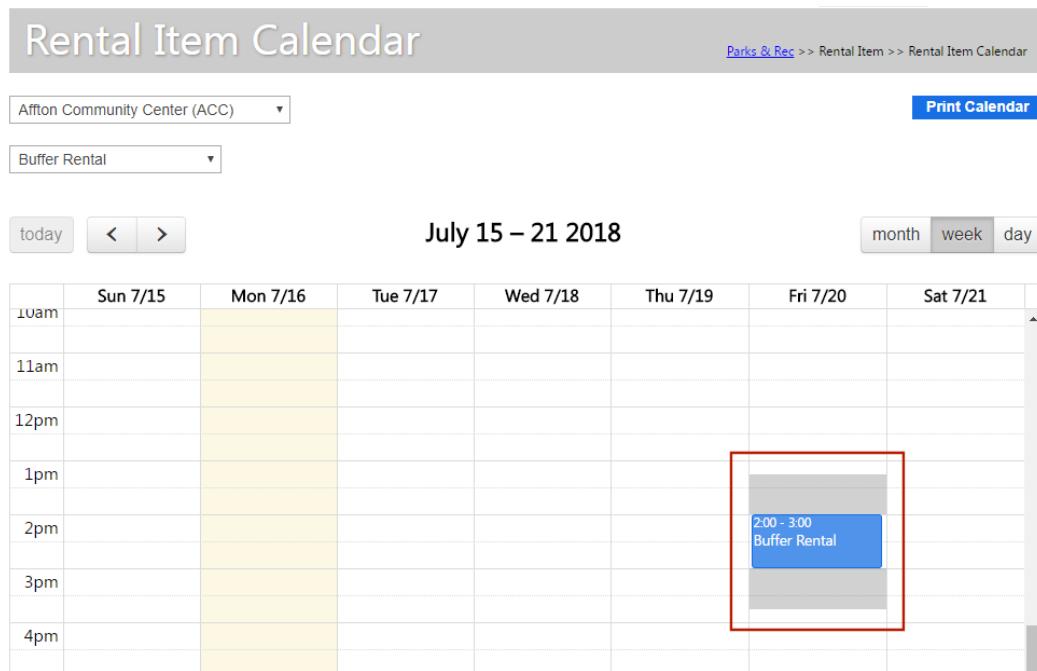
The Registration Start and Registration Deadline fields indicate when the item is available for rental.

Time buffers are blocked out for the rental registration process, ensuring the facility is not rented during those times; they also are taken into account for future rentals.

Setup Time (minutes)
15

Take Down Time (minutes)
30

The Setup Time is the amount of time blocked out before the rental, and the Take Down time is the amount of time blocked out after the rental. Buffer times are shown as shaded areas before and after rental times on the Rental Item Calendar.



Example: As the image above shows, if Setup Time is 15 minutes and Take Down time is 30 minutes, the pre- and post-buffer shadings cover 45 minutes each to account for the setup and take down times on either side of the rental itself.

If you were to click on a shaded area, a message would display to let you know the facility is not available for the time selected.

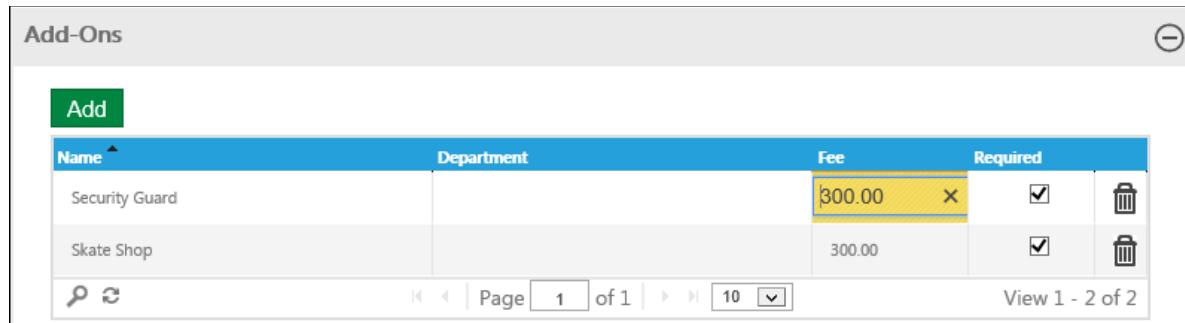
In addition to general rental information, the Rental Details page provides options for determining rental requirements and assigning miscellaneous administrative settings.

Field	Description
Require Approval	If selected, enables the approval workflow process for rental reservations for this facility or item, and requires approval on rental reservations before payment can be taken. Reservations that require approval are shown on the Rental Registration Approvals page.
Include Disclaimer on Receipt	If selected, includes the selected disclaimer text on registration receipts. The disclaimer notices set up for your organization are available in the Registration Disclaimer list.
Active	If selected, indicates the item is currently available for rental.
Allow Alcohol	If selected, indicates that alcohol may be served or consumed at the rental facility. This check box is only applicable to facilities at which it is permissible to serve alcoholic beverages. The default value for this check box is not selected
Show on Portal	If selected, the Browse Facility setting is enabled for the citizen portal, the portal includes this rental item on the Browse Facilities list.
Allow Portal Registration	If selected, registration for the rental item is available from the citizen portal. When you select this check box and a user selects an available date for a rental item, the Register button is available. When the user clicks Register , the facility details are provided for completion (for example, times, number of attendees, and so on). The rental item can be added to the cart, if applicable. Once the registration process is completed, the facility record is updated and the rental status is set to Confirmed.
Financial Group	Identifies the financial source for the rental. For example, customer pay indicates payment is required by the renter.
Expense Disbursement	Identifies an expense disbursement method, if applicable.
Registration Custom Layout	Determines the layout template to use during registration. Only those templates for which the Show for Registration check box is selected are available. Use the Custom Fields and Custom Fields Layout options on the Administration tab to maintain customized fields.
Registration Disclaimer	Assigns a disclaimer to the registration process for the rental item. When you select an item from this list, the rental item details on the citizen portal includes a check box that the user must select to acknowledge the disclaimer. Select the Include Disclaimer on Receipt check box to include the selected disclaimer text on registration receipts.
Maximum Occupancy	Defines the maximum number of attendees that can be included at activities hosted at the rental facility.
Maximum/Minimum Days Booked in Advance	Define the advance rental timeframe for the item or facility. When the rental setup defines minimum days in advance on the rental item, facility rentals are restricted for the rental based on the

Field	Description
	advance minimum and maximum days. Using the Administration page, you can still rent the facility, but receive a warning message.
Description	Stores the rental description that displays on the citizen portal. This description should be brief, but provide enough detail to ensure prospective renters can be sure the item or facility meets their needs. The available formatting options for the description text allow you to set font type and size, add highlighting, and so on. When the text displays on the citizen portal, the formatting effects display.
Registration Receipt Note	Provides notes that are included on the receipt that displays in the citizen portal after registration, on the receipt that is emailed to the renter after registration, or on an email receipt reprint. The notes display in each rental registration section of the receipt. If multiple registrations include notes, the notes display with the details for each rental on the receipt. If you modify the receipt note text after receipts are initially printed, any reprinted receipts contain the original receipt note. The available formatting options for the receipt note text allow you to set font type and size, add highlighting, and so on. When the text displays on the citizen portal, the formatting effects display.

Add On

The Add On fields assign additional rental items that are required or available to be rented with the main rental item. For example, if you have an available arena rental, you may make a Skate Shop add-on available.



Name	Department	Fee	Required
Security Guard		300.00	<input checked="" type="checkbox"/>
Skate Shop		300.00	<input checked="" type="checkbox"/>

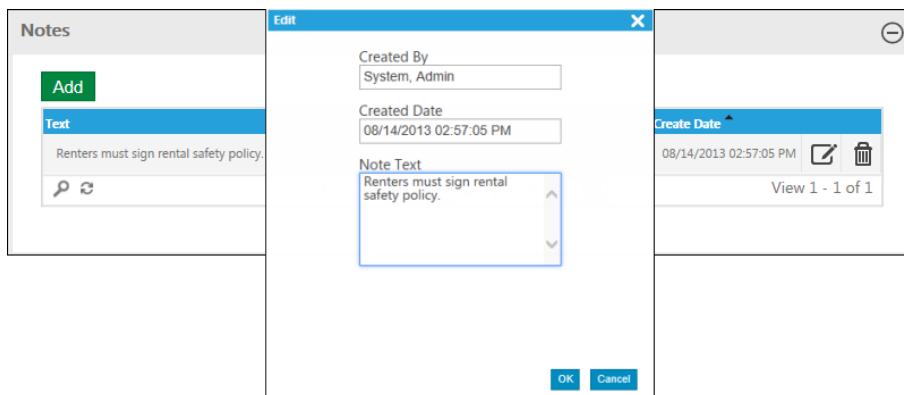
To make an add-on required, select the Required check box for the add-on item. In this case, the Required box on the Details page of the portal displays a default value of one (1) and the user cannot change this. If an add-on item or service is not required, the value of this box is zero (0).

If a rental or class registration is completed using the Tyler Parks and Recreation application, the default value for the Buy check box on the Summary page is selected for required items.

To adjust the add-on fee for the specific rental, click the Fee field and enter the updated cost.

Notes

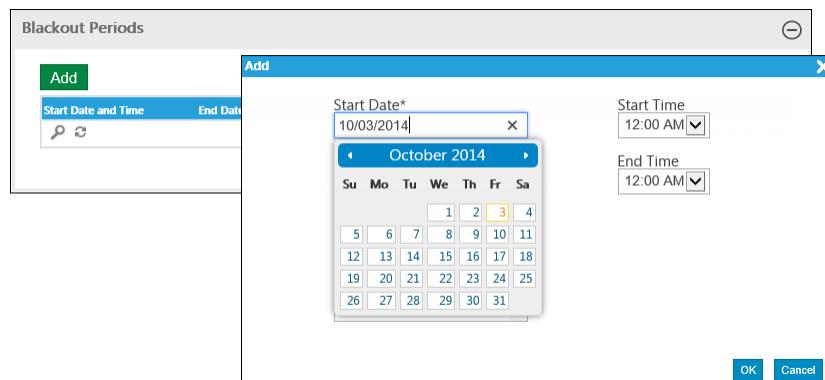
Notes provides additional information for the team. Click **Add** or the edit button to create or maintain notes.



The screenshot shows the 'Notes' application interface. On the left, a list of notes is displayed with a single note selected: 'Renters must sign rental safety policy.' The 'Edit' dialog is open over this note, showing 'Created By' as 'System, Admin' and 'Created Date' as '08/14/2013 02:57:05 PM'. The 'Note Text' field contains the same note content. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

Blackout Periods

Blackout Periods defines times when a rental item is not available. For example, if a facility is closed for repair or cleaning, you can define that time using this option to exclude the item from availability.



The screenshot shows the 'Blackout Periods' application interface. On the left, an 'Add' dialog is open, prompting for 'Start Date and Time' (10/03/2014) and 'End Date and Time' (12:00 AM). The 'Start Date' field is highlighted. The 'End Date' field is also present. Below these fields is a date picker calendar for October 2014, with the 3rd highlighted. At the bottom are 'OK' and 'Cancel' buttons.

Hours

The Hours table defines the daily schedule for a class. The default value for each day is 12:00 AM to 12:00 AM. To define times, select the **IsActive** check box for the day, and then select the applicable times from the Start and End Time lists.

Hours				
Day of the week	IsActive	Start time	End time	
Sunday	<input type="checkbox"/>	12:00 AM	12:00 AM	
Monday	<input type="checkbox"/>	12:00 AM	12:00 AM	
Tuesday	<input type="checkbox"/>	12:00 AM	12:00 AM	
Wednesday	<input type="checkbox"/>	12:00 AM	12:00 AM	
Thursday	<input type="checkbox"/>	12:00 AM	12:00 AM	
Friday	<input type="checkbox"/>	12:00 AM	12:00 AM	
Saturday	<input checked="" type="checkbox"/>	8:00 AM	4:00 PM	

When you select a start time, the default value for the End Time field is one hour later than the value entered in the Start Time field, but you can change this.

The available time intervals, which can be five, fifteen, thirty, or sixty minutes, are defined using the Time Picker Interval list in System Settings. If you select a start time, you must also select an end time.

Parent Rentals

Through a tiered facilities feature, rentals may be tied to each other, creating parent-child relationships and avoiding scheduling conflicts.

The Parent Rentals table contains the rentals that are attached to the selected rental item as parent rentals. The table below shows the selected item is the child of two parent rentals.

Parent Rentals				
Item Number	Name	Location	Type	
06-2018-000104	Meeting	Field House	Meeting Room	
06-2018-000105	The Room	Field House	Room	
 	Page	1 of 1	10	View 1 - 2 of 2

Parent rentals may be edited but may not be added to the grid or removed from it.

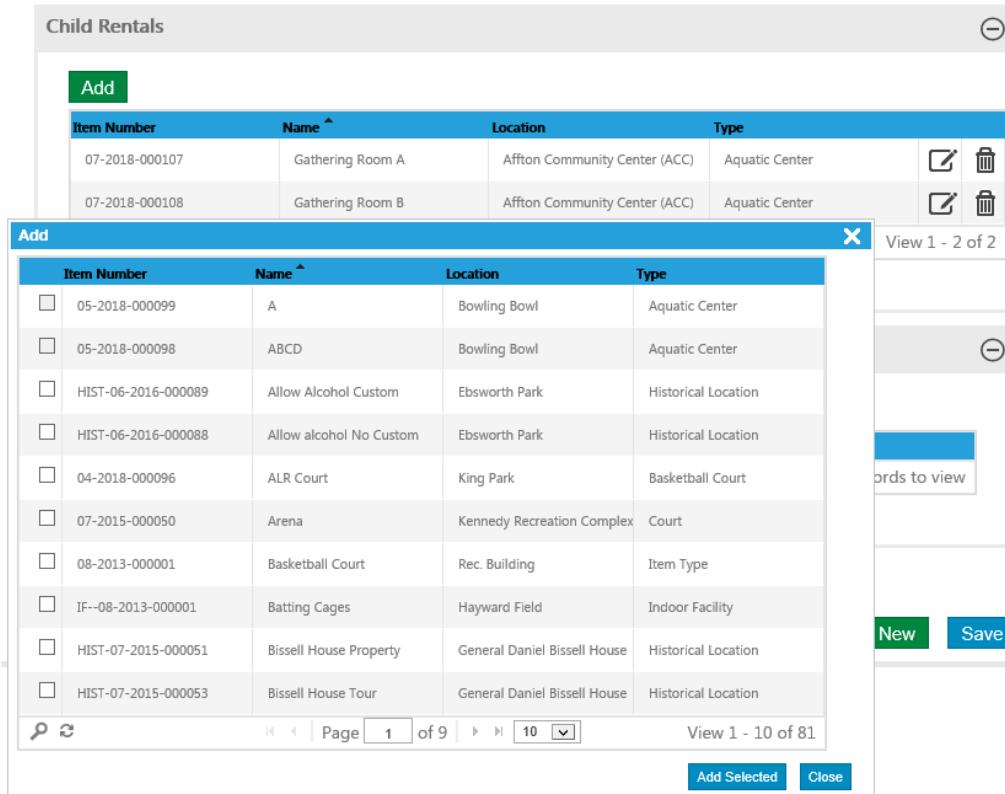
Child Rentals

The Child Rentals table contains rentals that are attached to the selected rental item as children.

Child Rentals				
Add				
Item Number	Name	Location	Type	
07-2018-000107	Gathering Room A	Affton Community Center (ACC)	Aquatic Center	 
07-2018-000108	Gathering Room B	Affton Community Center (ACC)	Aquatic Center	 
 	Page	1 of 1	10	View 1 - 2 of 2

Child rentals may be added, edited and removed from the grid.

To add one or more child rentals to the selected rental item, click the **Add** button. A dialog containing a table of rentals displays.



The screenshot shows a 'Child Rentals' dialog box. At the top left is an 'Add' button. The main area is a table with columns: Item Number, Name, Location, and Type. Two rows are visible: '07-2018-000107' (Gathering Room A, Afton Community Center (ACC), Aquatic Center) and '07-2018-000108' (Gathering Room B, Afton Community Center (ACC), Aquatic Center). To the right of the table are two checkboxes and a trash can icon. Below the table is a 'View 1 - 2 of 2' label. A large list of rental items is displayed in a grid format. The columns are: Item Number, Name, Location, and Type. The list includes items like '05-2018-000099' (A, Bowling Bowl, Aquatic Center), '05-2018-000098' (ABCD, Bowling Bowl, Aquatic Center), and many others. Each item has a checkbox in the first column. To the right of the grid are buttons for 'New' and 'Save'. At the bottom of the dialog are search, page navigation, and 'Add Selected' buttons.

Select the check boxes next to the rental items you want to add as children, and click the **Add Selected** button. The check boxes for items that already have child rentals assigned are disabled.

When you edit a rental item that is attached to a parent rental, the parent rental shows in the Parent Rentals grid.

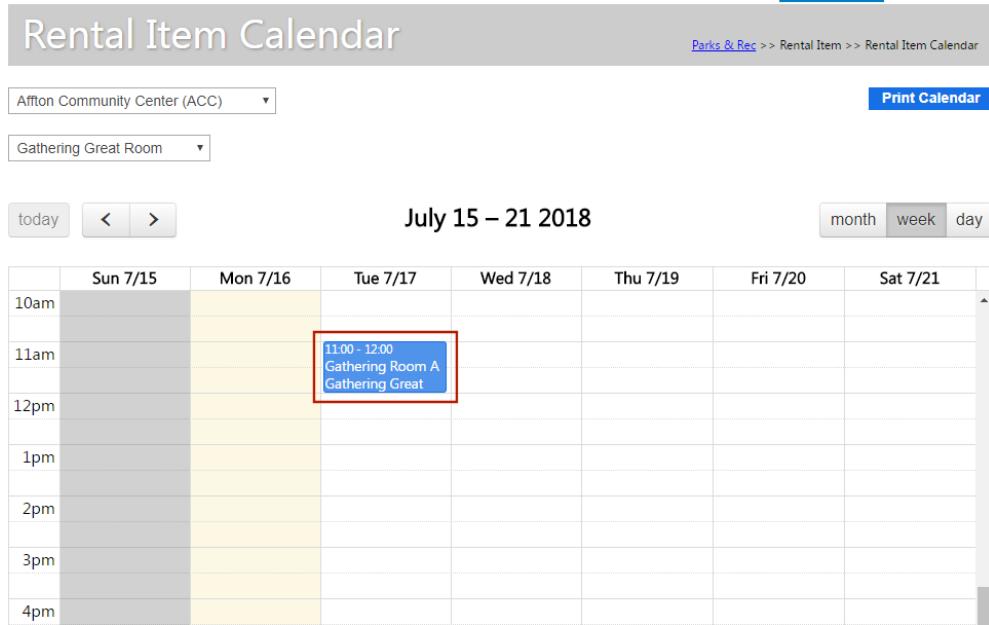
Note: A parent rental may have multiple child rentals attached, and a child rental may be attached to multiple parent rentals, but a rental may not be a parent and a child. As the following image shows, if a selected rental item already is attached to a parent, the **Add** button for the Child Rentals grid is disabled.



The screenshot shows a 'Child Rentals' dialog box. The 'Add' button at the top left is highlighted with a red box. The main area is a table with columns: Item Number, Name, Location, and Type. The table is empty. Below the table is a 'No records to view' message. At the bottom of the dialog are search, page navigation, and 'Add Selected' buttons.

If a child rental, such as Gathering Room A, is scheduled on the Rental Item Calendar, and you attempt to schedule its parent rental, such as Gathering Great Room, for the same time,

the Gathering Great Room will be unavailable, since one of its children has been rented, as the following image shows.

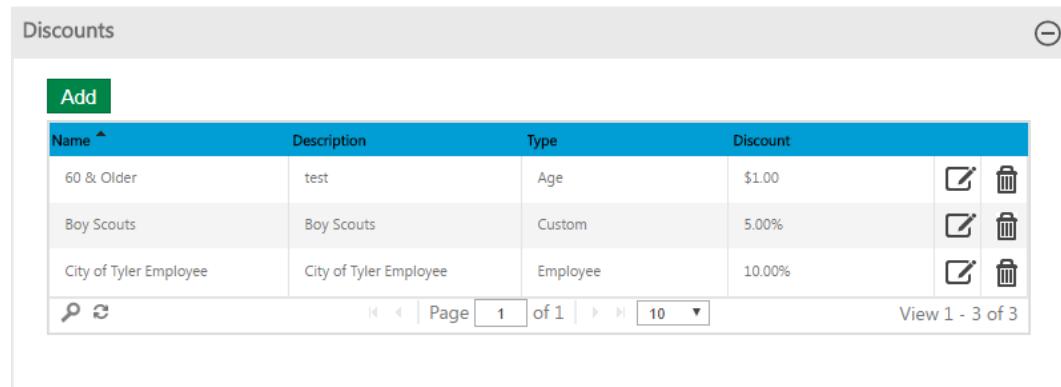


The screenshot shows a rental calendar for the 'Gathering Great Room' at the 'Afton Community Center (ACC)'. The calendar displays the week from July 15 to July 21, 2018. A red box highlights a conflict on Tuesday, July 17, from 11:00 to 12:00. The conflict is between a 'Gathering Room A' rental (parent) and a 'Gathering Great' rental (child). The 'Gathering Great' rental is listed as '11:00 - 12:00' and 'Gathering Room A'.

The same holds true if you attempt to schedule a child rental the same time as its already-scheduled parent rental.

Discounts

The Discounts table displays the discounts that have been set up in Administration and applied to the selected rental item.



The screenshot shows a 'Discounts' dialog with an 'Add' button. The table lists three discounts:

Name	Description	Type	Discount	Actions
60 & Older	test	Age	\$1.00	<input checked="" type="checkbox"/> <input type="checkbox"/>
Boy Scouts	Boy Scouts	Custom	5.00%	<input checked="" type="checkbox"/> <input type="checkbox"/>
City of Tyler Employee	City of Tyler Employee	Employee	10.00%	<input checked="" type="checkbox"/> <input type="checkbox"/>

Below the table are search and navigation buttons, and a message 'View 1 - 3 of 3'.

Clicking the **Add** button opens a dialog of the discounts that are available to be applied to the rental item.

Discounts

Add

Name	Description	Type	Discount
Test_Percentage	test percent discount	Age	15.00%
Test_Dollar Amount	test dollar amount	Age	\$10.00
Stefan Age	Stefan Age	Age	1.40%
Employee	test	Employee	\$7.00
Middle Age	Middle Age	Age	\$3.00
Multi Family	Multi Family	Multi-Family	
AAA	AAA Membership	Custom	5.00%

Page 1 of 1 10 View 1 - 7 of 7

Add Selected Close

To apply a discount, select the corresponding check box, and click **Add Selected**.

Clicking the **Edit** icon opens the Discount Details page, where the details of the discount are available for editing.

Discount Details

Parks & Rec >> Rental Item >> Edit Discount

Back to Rental Item Save

Name*	Dollar Amount
60 & Older	1.00
Description	Percentage
test	
Discount Type*	Start Date*
Age	5/22/2018
From Age	End Date
60	12/31/2018
To Age	
<input checked="" type="checkbox"/> Available to Classes <input checked="" type="checkbox"/> Available to Rentals <input checked="" type="checkbox"/> Available to Memberships <input checked="" type="checkbox"/> Available to Non-Resident	

To return to the Rental Item Details page from the Discount Details page, click the **Back to Rental Item** button.

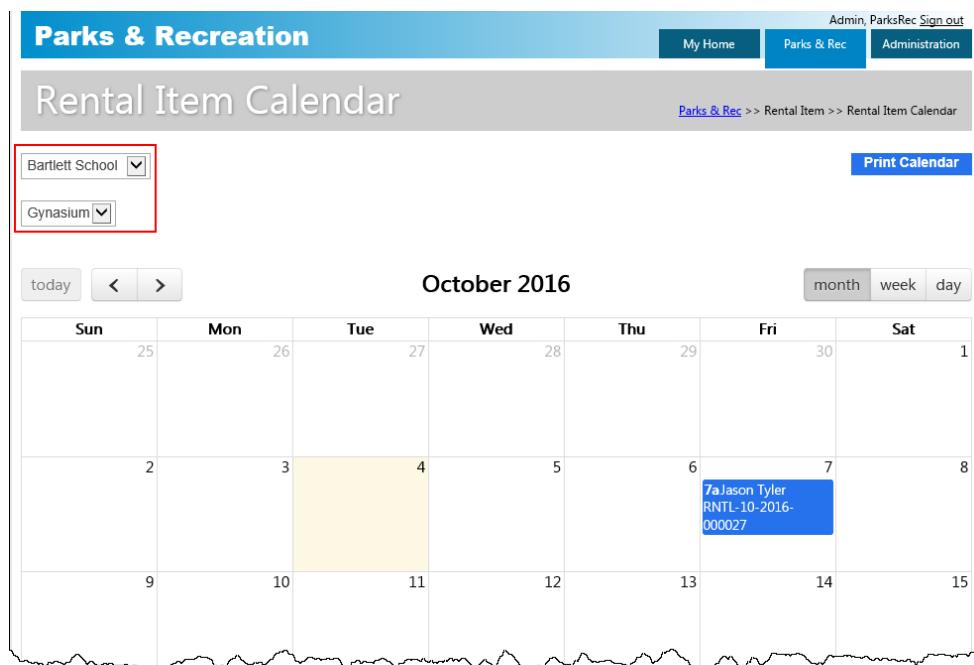
Calendar

The Rental Item Calendar provides a daily, weekly, or monthly view for active rental registrations. Use the Month, Week, and Day options to reset the timeframe for the display. To make it easy to see the available rental times for a selected facility, off hours are shaded in gray, as shown below:

	Sun 8/5	Mon 8/6	Tue 8/7	Wed 8/8	Thu 8/9	Fri 8/10	Sat 8/11
6am							
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							

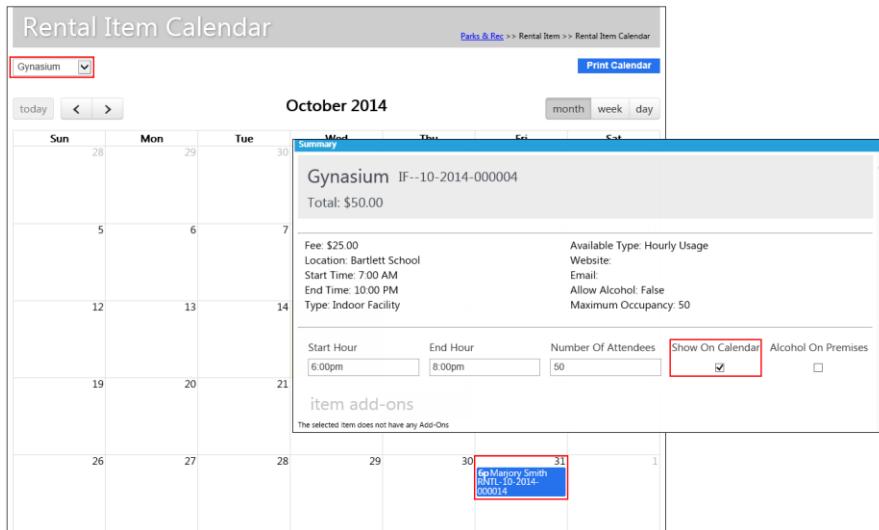
Using the filter lists, you can narrow the rental item to a specific item at a specific location. Select the location from the first list, and then select the rental item from the second list. The available options for the second level list are dependent on the location selected in the first list.

For example, to view only the availability of the gymnasium at a specific school, select the school from the first list, and then select the location from the subsequent list.



The screenshot shows the Parks & Recreation Rental Item Calendar for October 2016. The interface includes a top navigation bar with 'Parks & Recreation', 'My Home', 'Parks & Rec', and 'Administration' buttons. Below the navigation is a 'Rental Item Calendar' section with two dropdown menus: 'Bartlett School' and 'Gymnasium'. The calendar itself shows the month of October with days numbered 1 through 31. The 4th of October is highlighted in yellow, indicating availability. A tooltip on the 7th shows a rental registration for 'Jason Tyler' with ID 'RNTL-10-2016-000027'.

When you complete a rental item registration, select the Show on Calendar check box to include the rental activity on the calendar.



Rental Item Calendar

Parks & Rec > Rental Item > Rental Item Calendar

Gynasium

Print Calendar

today < >

October 2014

Summary

Mon Tue Wed Thu Fri Sat Sun

28 29 30 7 12 13 14 19 20 21 26 27 28 29 30 31 1

Gynasium IF--10-2014-000004

Total: \$50.00

Fee: \$25.00 Available Type: Hourly Usage
Location: Bartlett School Website:
Start Time: 7:00 AM Email:
End Time: 10:00 PM Allow Alcohol: False
Type: Indoor Facility Maximum Occupancy: 50

Start Hour: 6:00pm End Hour: 8:00pm Number Of Attendees: 50

Show On Calendar Alcohol On Premises

item add-ons

The selected item does not have any Add-Ons

30 Gynasium IF--10-2014-000004

When you specify a rental item, and then select a future time and day, you are automatically directed to the Payer screen, where you can select the rental item contact, and then move through the remaining rental item steps.

Parks & Recreation

[My Home](#) [Parks & Rec](#) [Administration](#)

Rental Item Calendar

Parks & Rec >> Rental Item >> Rental Item Calendar

Bartlett School

Ice Arena

today

September 20 - 26 2015

	Sun 9/20	Mon 9/21	Tue 9/22	Wed 9/23	Thu 9/24	Fri 9/25	Sat 9/26
6am							
7am							
8am							
9am							
10am							
11am							
12pm							
1pm							
2pm							
3pm							
4pm							

Parks & Recreation

[My Home](#) [Parks & Rec](#) [Administration](#)

Rental Registration Create

Parks & Rec >> Rental Registration >> Rental Registration Create

SELECT PAYER RENT ITEMS CONFIRM ORDER PAY INVOICE

Payer:

Summary

Ice Arena AR--08-2013-000002

Total: \$1500.00

Fee: \$300.00 Available Type: Hourly Usage
 Location: Hayward Arena Website:
 Start Time: 12:00 AM Email:
 End Time: 12:00 AM Allow Alcohol: No
 Type: Arena Maximum Occupancy: 50

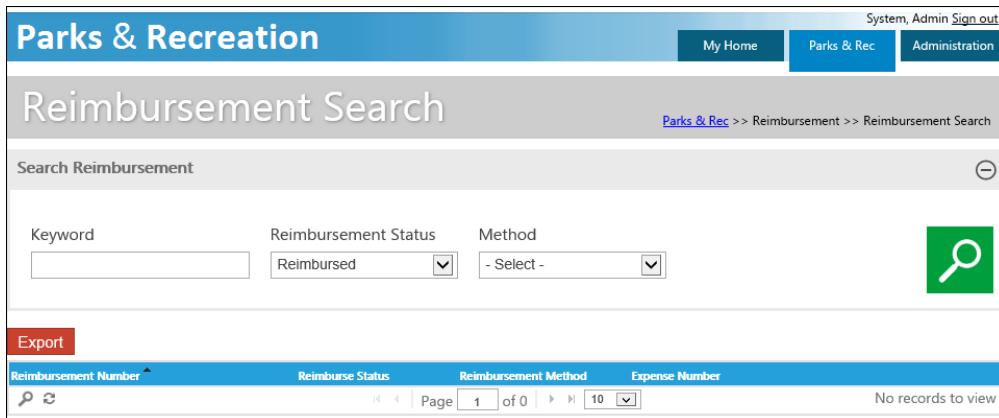
Start Hour	End Hour	Number Of Attendees	Show On Calendar	Alcohol On Premises
2:30pm	6:00pm	20	<input checked="" type="checkbox"/>	<input type="checkbox"/>

item add-ons

Name	Fee	Quantity	Buy
Skate Shop	\$300.00	1	<input type="checkbox"/> <input type="checkbox"/> *Required

Reimbursement

Reimbursement creates a list of records for fees that have been reimbursed. You can create the list by status or method. Once you have created the list, click **Export** to export the details to Microsoft Excel.



Parks & Recreation

System, Admin Sign out

My Home Parks & Rec Administration

Reimbursement Search

Parks & Rec >> Reimbursement >> Reimbursement Search

Search Reimbursement

Keyword Reimbursement Status Method

Reimbursed - Select -

Export

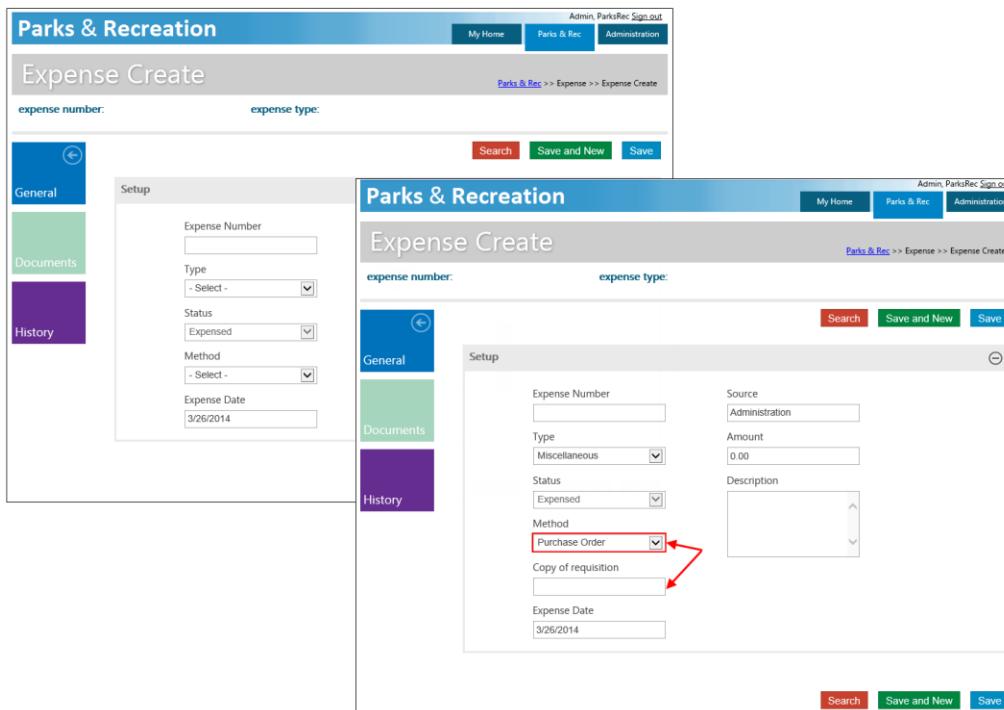
Reimbursement Number Reimburse Status Reimbursement Method Expense Number

Page 1 of 0 10 No records to view

Expense

Expense maintains expense records for activities. The expense record includes the type, status, and method. When you save an expense record, the program assigns an expense number.

The fields available on the Expense page vary according to the values that you enter. For example, if you select Purchase Order from the Method list, the page refreshes to include the Copy of Requisition box.



Parks & Recreation

Admin, ParksRec Sign.out

My Home Parks & Rec Administration

Expense Create

Parks & Rec >> Expense >> Expense Create

expense number: expense type:

Search Save and New Save

General Documents History

Setup

Expense Number

Type: - Select -

Status: Expensed

Method: - Select -

Expense Date: 3/26/2014

Parks & Recreation

Expense Create

Parks & Rec >> Expense >> Expense Create

expense number: expense type:

Search Save and New Save

General Documents History

Setup

Expense Number

Type: Miscellaneous

Status: Expensed

Method: Purchase Order

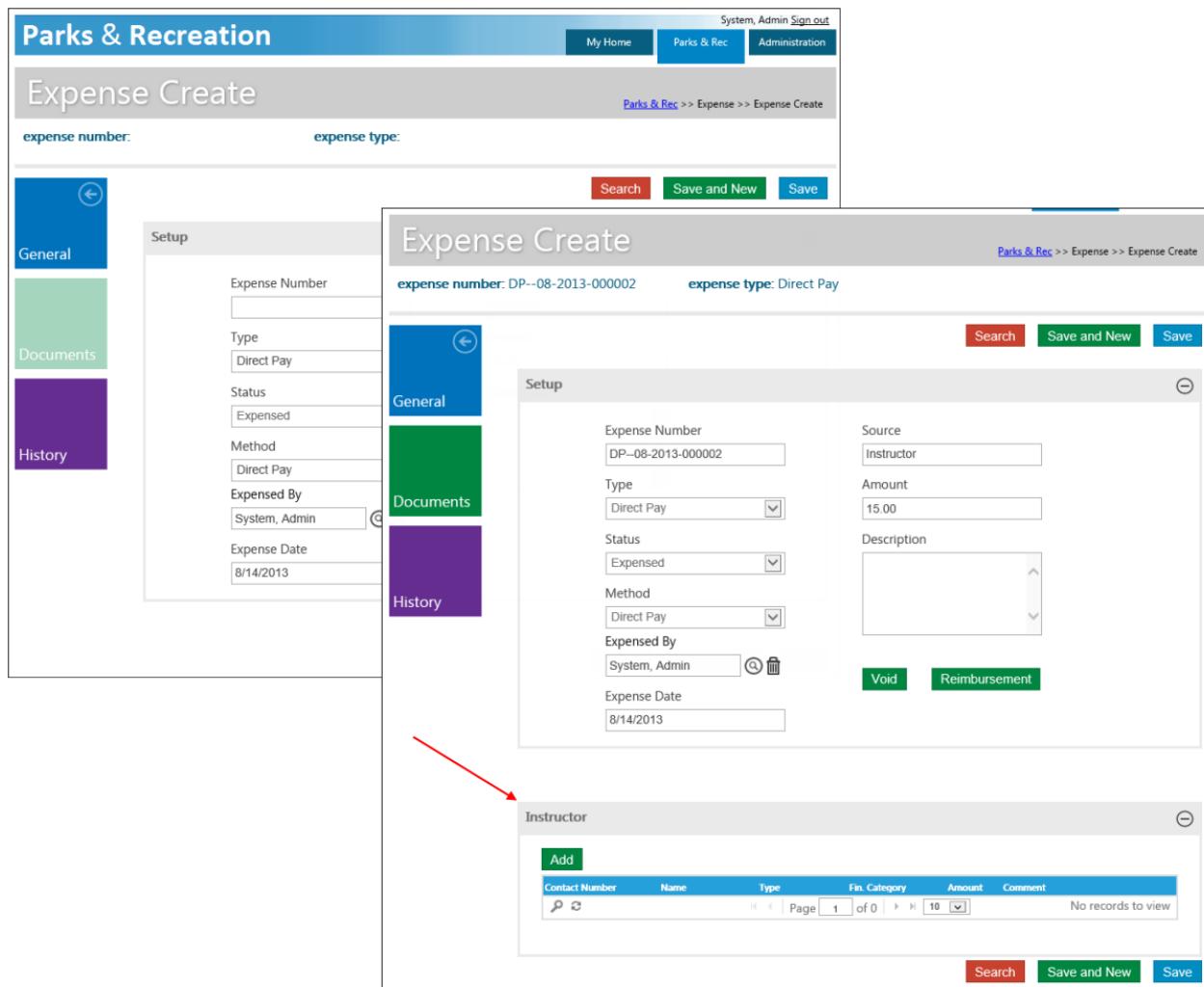
Source: Administration

Amount: 0.00

Description:

Expense Date: 3/26/2014

Or, if you create an expense record to pay an instructor, when you click **Save**, the page refreshes to include the Instructor section, which you can use to identify the recipient.



The screenshot shows the Parks & Recreation system's Expense Create page. The left sidebar has buttons for General, Documents, and History. The main area has tabs for Setup, Parks & Rec, and Administration. The current tab is Parks & Rec. The sub-page is Expense Create. The top navigation bar shows 'Parks & Rec >> Expense >> Expense Create'. The main content area has fields for expense number (DP-08-2013-000002), expense type (Direct Pay), and a setup section with fields for Expense Number, Type, Status, Method, Expensed By, and Expense Date. A red arrow points from the 'Save' button in the setup section to the 'Instructor' section below. The 'Instructor' section has fields for Source (Instructor), Amount (15.00), Description, and buttons for Void and Reimbursement. The bottom of the page has a table for adding instructors with columns for Contact Number, Name, Type, Fin. Category, Amount, and Comment. The table shows 10 records. The bottom navigation bar has 'Search', 'Save and New', and 'Save' buttons.

In this case, the value of the Amount field in the Instructor section must match the value of the Amount on the expense record. For reimbursable instructor expenses, click **Reimbursement** to specify a reimbursements method and date.

Reimbursement

Expense Source	Reimbursement Method
Instructor	Manual check
Amount	Reimburse Date
150.00	1/6/2014
Reimbursement Status	Description
Reimbursed	
Recorded Date	
1/6/2014	

Contact Number **Name** **Type** **Fin. Category** **Amount** **Comment**

07-2013-000002	LeVesque,Patrick	Coach I	Debit/Credit	\$150.00	
----------------	------------------	---------	--------------	----------	--

OK **Cancel**

For the Class, Instructor, Location, or Rental Item expense records, when you select the edit option, you can edit the amount and select a financial category name.

Edit

Amount
0
Financial Category Name
Debit/Credit
Comment

OK **Cancel**

For expenses with a source of Administration, the Associated Type list is available. From this list, select the associated expense type: Class, Instructor, Rental, or Location. The associated type group displays; use this to specify the type and then once you have added that type record, click the **Edit** button to specify a financial category.

Expense Number

Source

Type

Associated Type

Status

Method

Receipt

Expense Date

Amount

Description

Void

Class ←

Add

Class Number	Class Name	Class Type	Fin. Category	Amount	Comment
11-2013-000004	Running	Athletic - Indoor		7.50	<input checked="" type="checkbox"/> 

←   Page of 0    View 1 - 1 of 1

For instructor payments that have a defined expense type that includes a Cashier Expense Source of Instructor and for which the Instructor Type Details defines a Financial Group for instructors with debit and credit accounts to use for exporting payments, you can create an export file of instructor expenses. After you have created an instructor expense reimbursement record, click **Export** in the Reimbursement group on the Parks & Rec tab. Depending on the parameters defined on the Integration Settings page of the System Setup group on the Administration tab, click **Export** or **AP Export** to export the data.

Parks & Recreation

Reimbursement Export

Search Reimbursements

Start Date **End Date** **Minimum Amount** **Maximum Amount**

Reimbursement Number **Status** **Processed By** **Payee Name**

AP Export Status

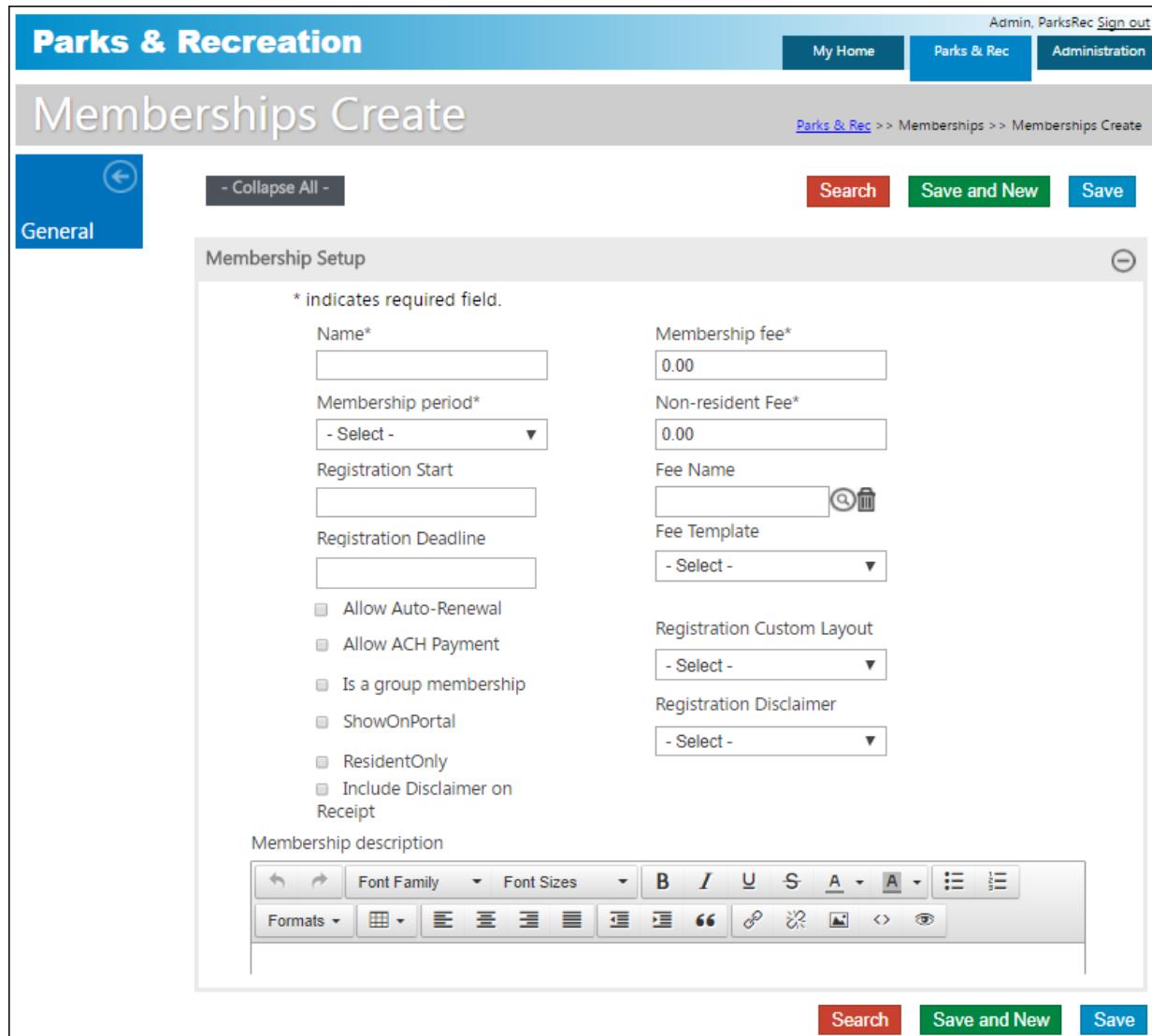
Export **AP Export**

Reimbursement Number	Status	Name	Address 1	City	State	ZIP Code	Amount	Processed By
01-2014-000004	Reimbursed	LeVesque, Patrick					150.00	admin@document

←   Page of 1    View 1 - 1 of 1

Memberships

Memberships manages available memberships types and membership records for your organization. For example, if your organization provides a fitness membership, registered members can pay a yearly or monthly fee to participate in your fitness programs.



Parks & Recreation

Memberships Create

General

- Collapse All -

Membership Setup

* indicates required field.

Name*	Membership fee*
<input type="text"/>	<input type="text" value="0.00"/>
Membership period*	Non-resident Fee*
- Select -	<input type="text" value="0.00"/>
Registration Start	Fee Name
<input type="text"/>	<input type="text"/>
Registration Deadline	Fee Template
<input type="text"/>	- Select -
<input type="checkbox"/> Allow Auto-Renewal	Registration Custom Layout
<input type="checkbox"/> Allow ACH Payment	- Select -
<input type="checkbox"/> Is a group membership	Registration Disclaimer
<input type="checkbox"/> ShowOnPortal	- Select -
<input type="checkbox"/> ResidentOnly	
<input type="checkbox"/> Include Disclaimer on Receipt	

Membership description

Font Family:

Font Sizes:

B I U S A A

Formats:

Search Save and New Save

Available membership periods are established in Administration on the Membership Periods page.

The Automatically Renew check box makes the current membership available for automatic renewal. When this option is selected, the Allow ACH Payment check box is also available.

Search

Search locates available memberships according to specified keywords, access details, or membership details.

Parks & Recreation

Admin, ParksRec [Sign out](#)

My Home Parks & Rec Administration

Memberships Search

Parks & Rec >> Memberships >> Memberships Search

Memberships Search

Keyword Access Type Access To Membership Period

- Select - - Select - - Select - 

Age Is a Group Membership Residents Only

Create

Name	Discounts	Membership Fee	Membership Period	Is a Group Membership		
Delete		\$20.00 / \$25.00	30 Day Membership	false		
Mem 1	Discounts Available	\$10.00 / \$10.00	30 Day Membership	false		
Park and Music	Discounts Available	\$15.00 / \$15.00	30 Day Membership	false		
Pauls 30 day	Discounts Available	\$160 & Older, Boy Scouts, Employee, Stefan Age	30 Day Membership	false		
Stefan Membership		\$100.00 / \$120.00	Unlimited	false		
Stefans 2nd Membership		\$100.00 / \$110.00	Unlimited	false		
TestNumberOfDays	Discounts Available	\$30.00 / \$30.00	TestNumberOfDays	false		
Winter membership	Discounts Available	\$15.00 / \$20.00	Winter 2018-2019	false		

  Page 1 of 1 10 View 1 - 8 of 8

If a membership offers discounts, “Discounts Available” displays in the Fee column. Hovering over the message displays a list of the discounts available.

Note: The best available discount is applied automatically to a registrant’s fee. Existing family class and membership registrations are considered in determining whether a multi-family discount is eligible during a registration.

Click the edit button to review or update the membership details, including privileges and members.

Parks & Recreation

Memberships Details

Parks & Rec >> Memberships >> Memberships Details

General

- Collapse All -

Membership Setup

* indicates required field.

Name*	Membership fee*
Fitness Area	500.00
Membership period*	Non-resident Fee*
Annual	0.00

Receipt

- Select -

Membership description

The Fitness Area membership provides access to the fitness room and equipment for one year, seven days a week, from 5 a.m. to 10 p.m. daily.

Membership Privileges

Add

Name	Access type	Access to	Privilege period	Privilege allotment	Minimum	Maximum	Has discount
							No records to view

Membership Members

Member name	Group name	Start Date	Expiration date

Search Save and New Save

Membership Members

The Membership Members section includes an edit button for each member listed.

Membership Members

Member Name	Group Name	Start Date	Expiration date		
Jackson, Marilyn	Not Yet Implemented	05/03/2018	05/02/2019		
Martin, Marian	Not Yet Implemented	05/03/2018	05/02/2019		
Smith, Martin	Not Yet Implemented	05/03/2018	05/02/2019		
Sullivan, Nancy	Not Yet Implemented	05/03/2018	05/02/2019		
Tyler, Jason	Not Yet Implemented	05/03/2018	05/02/2019		
Young, Charles	Not Yet Implemented	05/03/2018	05/02/2019		

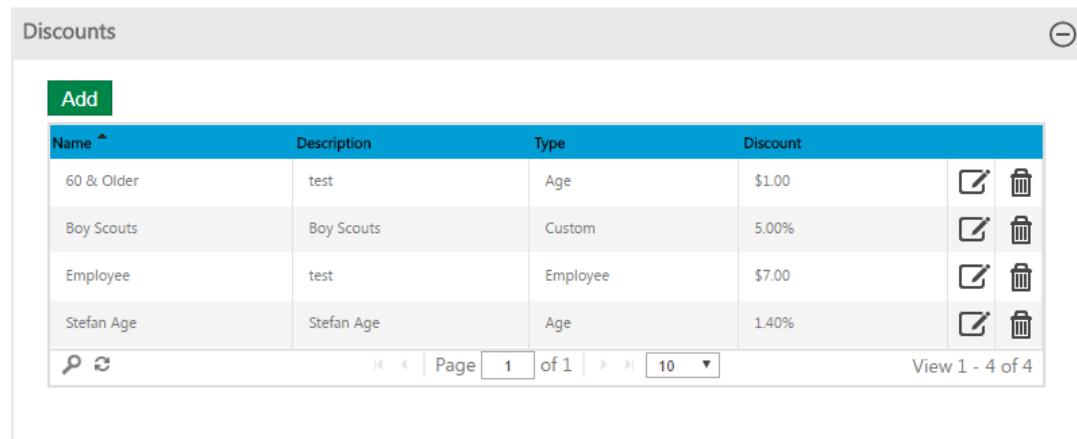
View 1 - 6 of 6

Clicking this button opens the Edit Membership Member screen which displays details about the selected contact's membership, including a member photograph if available, number of times the contact has used this membership, and the number of remaining uses. In addition,

the Automatically Renew check box indicates whether this membership is set to be automatically renewed. You can change the automatic renewal setting from this screen.

Discounts

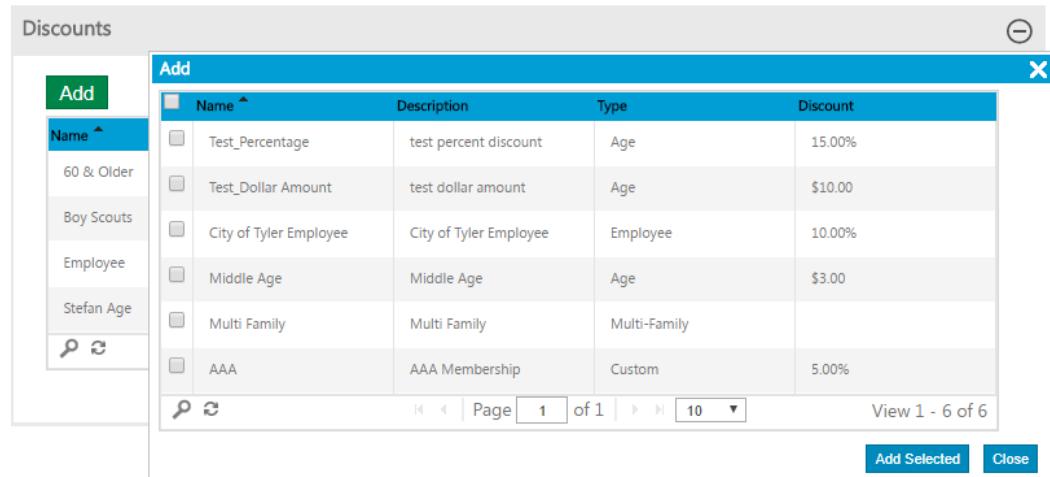
The Discounts table displays the discounts that have been set up in Administration and applied to the selected membership.



Name	Description	Type	Discount	Edit	Delete
60 & Older	test	Age	\$1.00		
Boy Scouts	Boy Scouts	Custom	5.00%		
Employee	test	Employee	\$7.00		
Stefan Age	Stefan Age	Age	1.40%		

View 1 - 4 of 4

Clicking the **Add** button opens a dialog of the discounts that are available to be applied to the membership.



Name	Description	Type	Discount
Test_Percentage	test percent discount	Age	15.00%
Test_Dollar Amount	test dollar amount	Age	\$10.00
City of Tyler Employee	City of Tyler Employee	Employee	10.00%
Middle Age	Middle Age	Age	\$3.00
Multi Family	Multi Family	Multi-Family	
AAA	AAA Membership	Custom	5.00%

View 1 - 6 of 6

Add Selected Close

To apply a discount, select the corresponding check box, and click **Add Selected**.

Clicking the **Edit** icon opens the Discount Details page, where the details of the discount are available for editing.

Discount Details

[Parks & Rec](#) >> Memberships >> Edit Discount

[Back to Membership](#)

[Save](#)

Name*	Dollar Amount
<input type="text" value="Employee"/>	<input type="text" value="7.00"/>
Description	Percentage
<input type="text" value="test"/>	<input type="text"/>
Discount Type*	Start Date*
<input type="text" value="Employee"/>	<input type="text" value="5/17/2018"/>
<input type="checkbox"/> Available to Family Members <input type="checkbox"/> Available to Classes <input type="checkbox"/> Available to Rentals <input type="checkbox"/> Available to Memberships <input type="checkbox"/> Available to Non-Resident	

To return to the Membership Details page from the Discount Details page, click the **Back to Membership** button.

Privileges

Privileges defines the access provisions for a membership. For example, if there are age or location access restrictions for a type of membership, they are defined using the Privileges option.

Edit Membership Privilege X

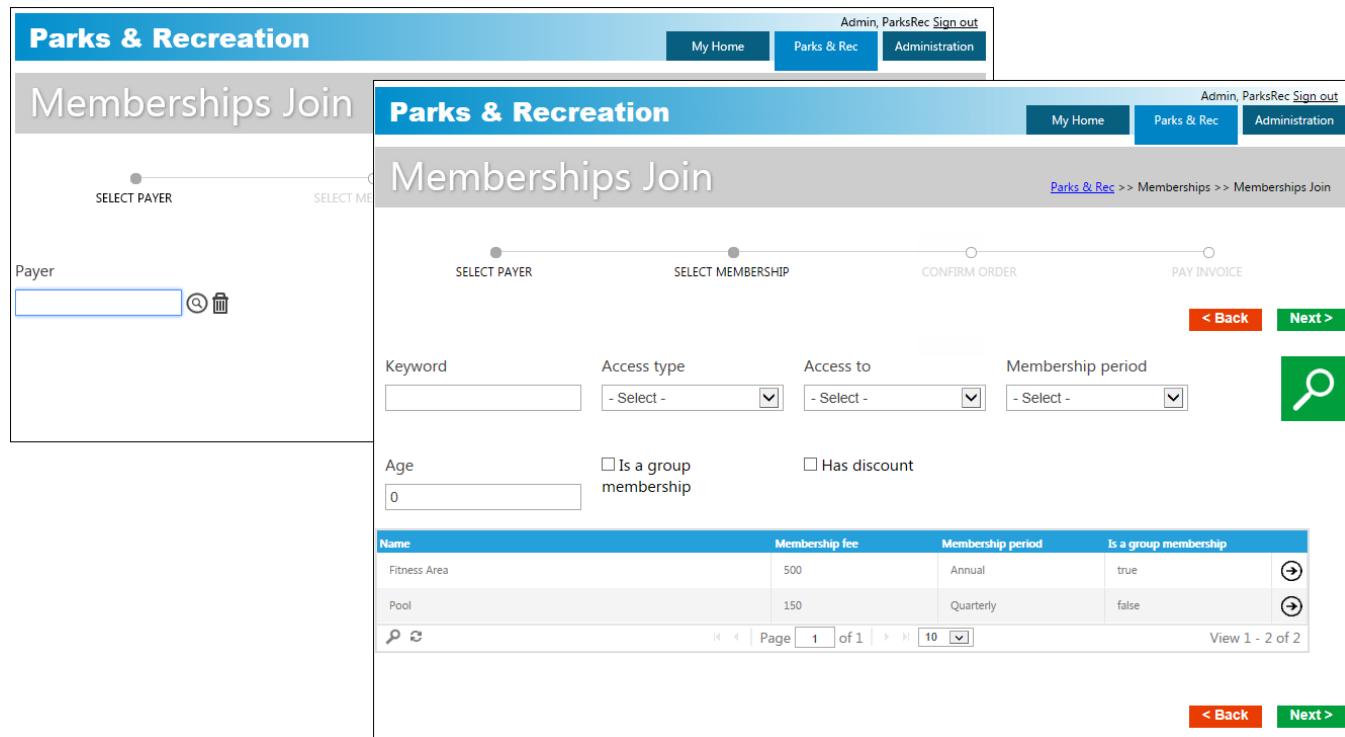
Privilege Setup ⊕

* indicates required field.

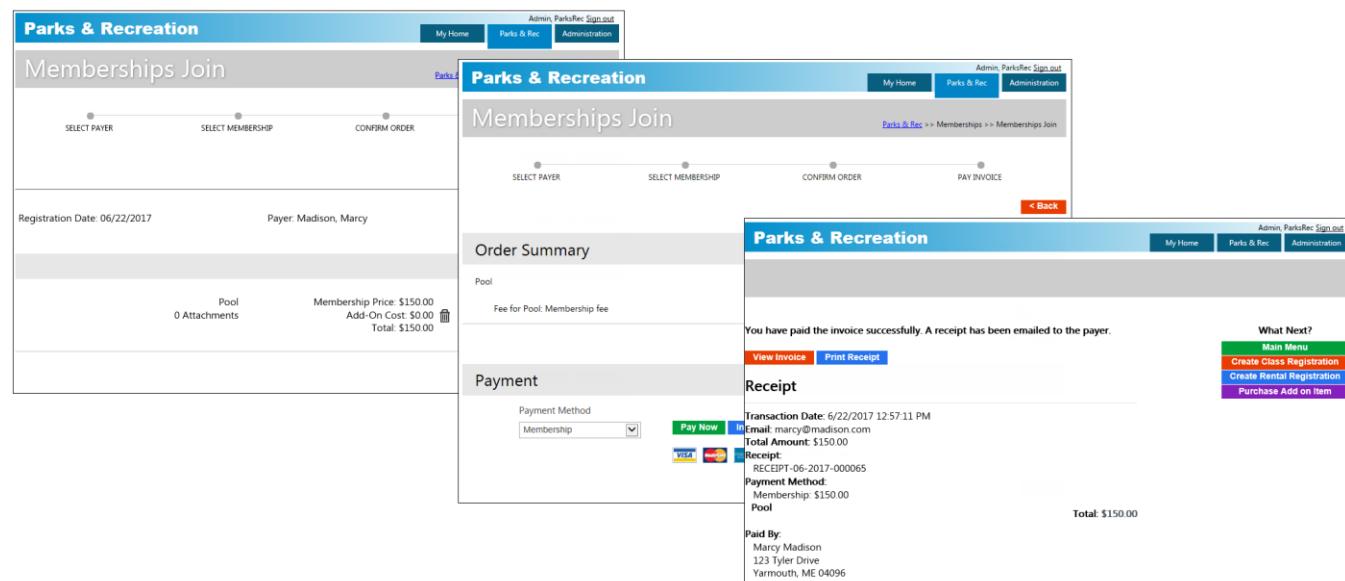
Name*	Access type
<input type="text" value="Fitness Center"/>	<input type="text" value="Location"/>
Minimum Age	Access to
<input type="text" value="15"/>	<input type="text" value="Fitness Center"/>
Maximum Age	Access Duration
<input type="text" value="199"/>	<input type="text" value="Annual"/>
Number of Accesses	Discount
<input type="text" value="Unlimited"/>	<input type="text" value="- Select -"/>

Join

Once memberships have been created, use the Join option to assign contacts to the membership.



When you complete membership registrations, the Order Summary screen identifies the membership type and amount, along with the options to pay now or to receive an invoice.



Sign In

For completed memberships, use the Sign In page to review the details.

Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Memberships Sign In

[Parks & Rec](#) >> Memberships >> Memberships Sign In

SELECT PRIVILEGE SCAN CARD

[Next >](#)

Keyword	Access type	Access to	Membership period
<input type="text"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>	<input type="button" value="- Select -"/>

Privileges that are not assigned to a membership are not listed.

Select	Name	Access type	Access to	Privilege period	Privilege allotment	Minimum	Maximum	Has discount
								No records to view

Administration

The Administration tab provides the setup options for the Parks and Recreation program.

Parks & Recreation
System, ParksRec [Sign out](#)

Administration
My Home
Parks & Rec
Administration

Administration

Parks & Rec. Setup

- [Add On Type](#)
- [Available Type](#)
- [Class Category](#)
- [Class Group](#)
- [Class Status](#)
- [Class Type](#)
- [Contact Role Type](#)
- [Contact Type](#)
- [Payment Plan Type](#)
- [Rental Status](#)
- [Financial Category](#)
- [Financial Group](#)
- [Instructor Type](#)
- [Instructor Status](#)
- [Location Status](#)
- [Item Status](#)
- [Location Type](#)
- [Item Type](#)
- [Disclaimer](#)
- [Schools](#)
- [Team Role](#)
- [Team Type](#)
- [Custom Fields](#)
- [Custom Field Layouts](#)
- [Module Settings](#)
- [Membership Period](#)
- [Restrictions](#)

Report Setup

- [Search](#)
- [Create](#)

Cashier Setup

- [ACH Settings](#)
- [Banks](#)
- [Payment Method](#)
- [GL Account](#)
- [Adjust Reason](#)
- [Delete Reason](#)
- [Disbursement Type](#)
- [Fee Schedule](#)
- [Fee](#)
- [Fee Template](#)
- [Expense Type](#)
- [Expense Method](#)
- [Reimbursement Method](#)
- [Cashier Status](#)
- [Discount](#)

System Setup

- [User Role](#)
- [User](#)
- [User Import](#)
- [Department](#)
- [System Settings](#)
- [Portal Settings](#)
- [Payment Gateways](#)
- [GIS Settings](#)
- [Integration Settings](#)
- [System Log](#)

These options maintain the key records that support the Parks and Recreation offerings within your community. These settings are required prior to completing the options on the Parks & Rec tab.

For efficiency, you should complete the Administration options in the order in which they are provided. In many cases, settings are based on other settings. For example, in order to complete the Fee page, you must have an available Fee Schedule record.

The following tables provide a brief description for the various setup programs.

Parks & Rec Setup

Category	Description
Add On Type	Maintains records for program extras, such as T-shirts, books, supplies, and so on.
Available Type	Provides time schedules for programs, for example, half-day morning or Saturdays only.
Class Category	Defines user-defined categories for activity offerings. Categories should be determined by your organization prior to completing the setup process.
Class Group	Defines a group of participants within a class or a group of personnel associated with a class.
Class Status	Identifies the status codes available for activities, for example, active, inactive, on hold, and so on.
Class Type	Describes the type of class, for example, classroom setting; the class type includes associated fees.
Contact Role Type	Provides an identity for defined contacts, for example, instructor, bus driver, director, and so on.
Contact Type	Specifies various contact types for your organizations (for example, general staff, coach, program director, and so on).
Payment Plan Type	Creates user-defined payments plans that can be associated with program offerings. Available payment plan types are determined by your organization.
Rental Status	Defines status levels for rental equipment or property.
Financial Category	Defined categories for financial expenses associated with programs.
Financial Group	Maintains groups for program-associated financing.
Instructor Type	Maintains instructor type categories that can be assigned to instructor records.
Instructor Status	Identifies the status codes for instructors.
Location Status	Identifies the status of locations where programs are offered.
Item Status	Defines the status levels for rental locations or facilities (for example, an arena or pavilion).
Location Type	Provides a type definition for program locations.
Item Type	Manages records for items associated with program offerings.
Disclaimer	Manages policy descriptions to associate with programs. The option allows you to require a participant acknowledgement for the policy.
Schools	Maintains records for schools that can be associated with programs.

Category	Description
Team Role	Creates roles to assign to team participants, for example, player or coach.
Team Type	Provides type categories to assign to teams.
Custom Fields	Maintains custom fields to manage additional activity, team, or rental information.
Custom Field Layouts	Provides the display position or layout for custom fields.
Module Settings	Assign custom field layouts, including prefixes, for recreation contact and rental item records.
Membership Period	Defines a period of time for a membership. You can define by number of days or by a range of dates.
Restrictions	Manages restrictions that you can apply to contacts to prevent them from completing processes (for example, class or rental registrations).

Cashier Setup

Category	Description
Payment Method	Defines the accepted payment methods.
GL Account	Maintains general ledger account details for recreation programs.
Adjust Reason	Specifies the reason an item is adjusted. The reason cannot contain more than 20 characters of text.
Delete Reason	Identifies the reason an item is deleted. The reason cannot contain more than 20 characters of text.
Disbursement Type	Provides supporting details for disbursements.
Fee Schedule	Defines the details for a defined period or schedule for a fee.
Fee	Identifies the description, fee amount, and associated general ledger accounts, if applicable. Fees are assigned according to a defined fee schedule.
Fee Template	Provides standard setup details that can be reused when assigning fees.
Expense Type	Categorizes expenses according to defined types.
Expense Method	Defines the methods for managing expenses. Expense methods can require supplemental data (for example, for purchase order expenses, a copy of the requisition would be supplemental data).
Reimbursement Method	Identifies how reimbursements can be processed (direct deposit, check, and so on).
Cashier Status	Maintains cashier status types to assign to charges and fees.
Discount	Maintains discounts that may be applied to individual classes, rentals and memberships.

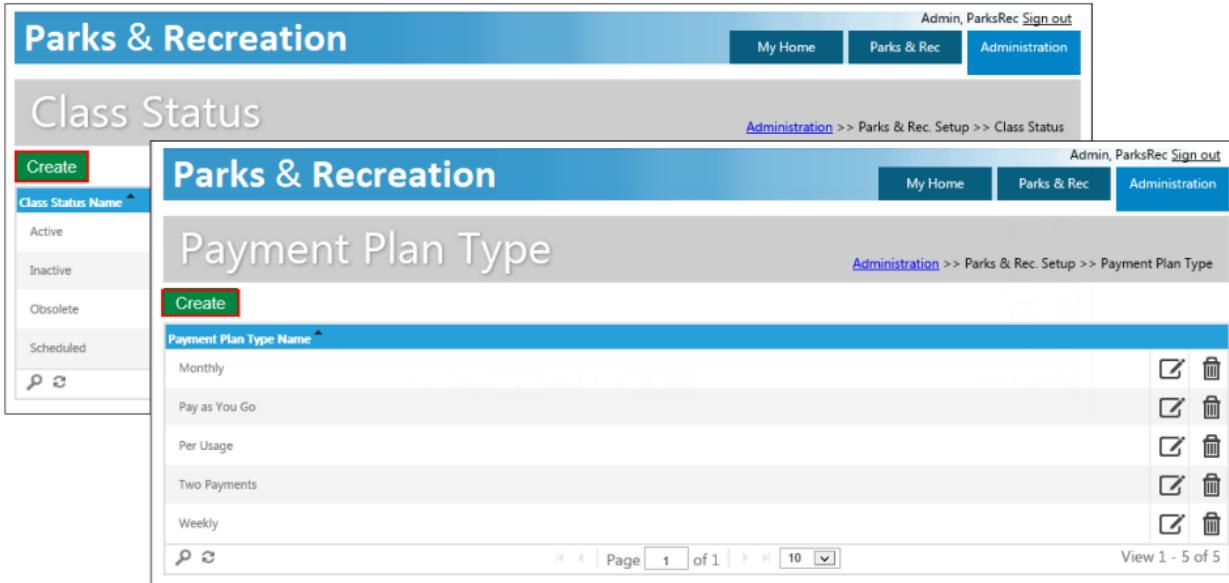
Report Setup

Category	Description
Search	Provides a list of existing reports.
Create	Defines the details for available reports and provides the ability to upload a report and an associated thumbnail image for the report. Reports can be shown or hidden on the citizen portal.

System Setup

Category	Description
User Role	Defines roles for Tyler Parks and Recreation users (for example, administrators, staff, or volunteers). The Rights tab provides the permissions available to assign roles.
User	Maintains records for individual users, who are assigned to established user roles.
User Import	Provides an import option for a comma-separated values (.csv) file containing user records.
Department	Maintains department categories for the organization.
System Settings	Maintains system, email, and report settings for the Parks and Recreation application.
Portal Settings	Maintains the settings for the citizen portal of Tyler Parks and Recreation. Settings include customized logo and background options, as well as messaging specific to your organization or current activities.
GIS Settings	Defines the URL and map details that manage the map display on the main page, including the area of interest and zoom scale settings.
Integration Settings	Specifies the type of export file created for the general ledger (GL) export option in Transaction on the Parks & Rec tab.
System Log	Provides a log for system activity, which can be exported directly to Microsoft Excel.

When you first select a Setup program, the page displays with no records. Click **Create** on each page to define the records needed to manage your organization's Parks and Recreation programs.



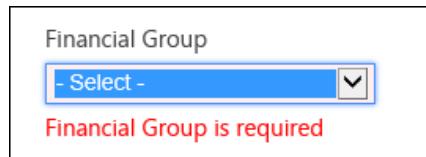
The screenshot shows two stacked application windows. The top window is titled 'Class Status' and displays a list of class status names: Active, Inactive, Obsolete, and Scheduled. A red box highlights the 'Create' button in the top-left corner. The bottom window is titled 'Payment Plan Type' and displays a list of payment plan types: Monthly, Pay as You Go, Per Usage, Two Payments, and Weekly. A red box highlights the 'Create' button in the top-left corner of this window. Both windows have a top navigation bar with 'Parks & Rec' and 'Administration' tabs, and a bottom navigation bar with 'My Home', 'Parks & Rec', and 'Administration' buttons.

Parks & Rec Setup

The Parks & Rec Setup group defines the type, status, roles, and other records that are used to process transactions in Tyler Parks and Recreation.

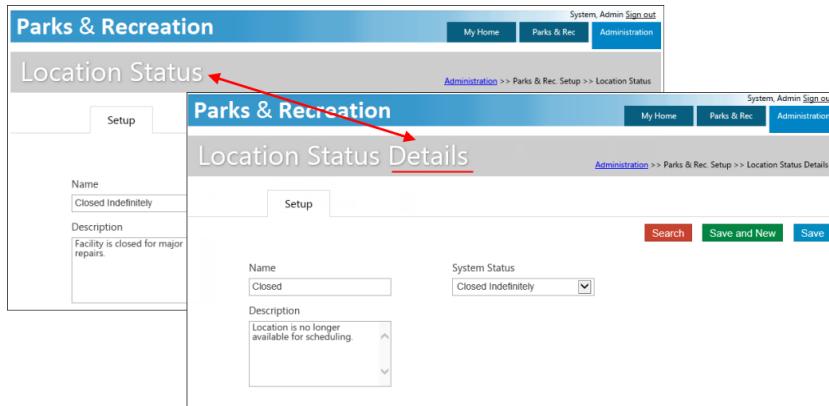
Throughout the setup pages, the Name boxes typically allow up to 20 characters of text.

If you attempt to leave a required field blank, the program highlights the field in red and indicates that you must enter or select a value.



A screenshot of a dropdown menu titled 'Financial Group'. The menu contains a single option: '- Select -'. Below the menu, a red error message reads 'Financial Group is required'. The entire box is enclosed in a light gray border.

Once a setup record is saved and selected using the Search option, the page is renamed to include "Details." The fields on the Details page are the same as the fields on the Create page.



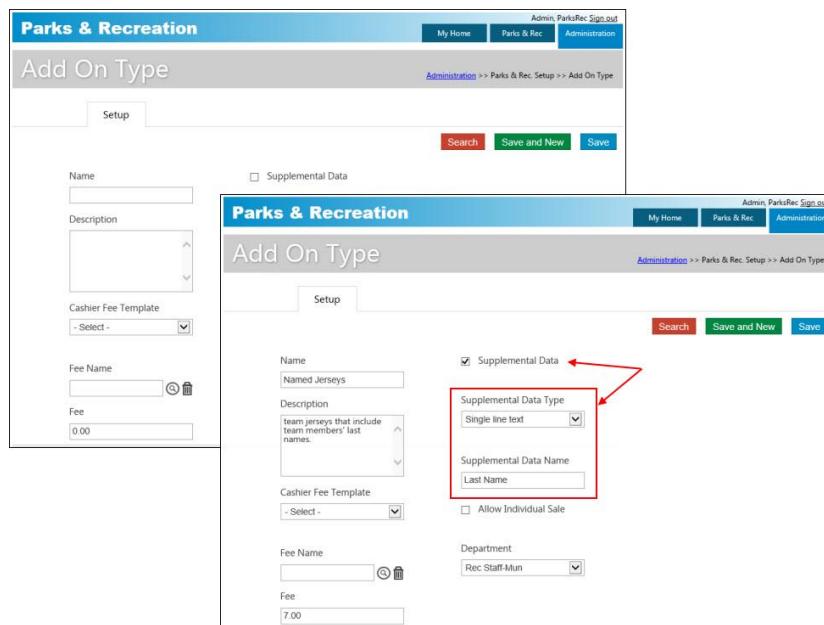
The image shows two screenshots of the Parks & Recreation application. The top screenshot is titled 'Location Status' and shows a setup page with fields for 'Name' (Closed Indefinitely) and 'Description' (Facility is closed for major repairs). The bottom screenshot is titled 'Location Status Details' and shows a details page with fields for 'Name' (Closed) and 'System Status' (Closed Indefinitely). A red arrow points from the 'Location Status' link on the setup page to the 'Location Status Details' page.

Several detail screens include the System Status list. This status is recognized by the Parks and Recreation application for processing. However, you can create user-defined variations for a status that provides additional details. For example, if the system status for an instructor is Inactive, you can have user-defined definitions that provide more details on why the instructor is inactive (terminated, maternity leave, relocated, and so on). In this case, the system acknowledges that instructor is inactive and is not eligible to be added as an instructor on a class, but the Instructor Info status provides more information.

Add On Type

Add On Type maintains records for required or available program items such as team jerseys, books, or art supplies. Add-on items can also be items such as safety personnel or concession provisions that are available or required for facility rentals.

If you select the Supplemental Data check box, you must complete the Supplemental Data Type list and the Supplemental Data Name box.

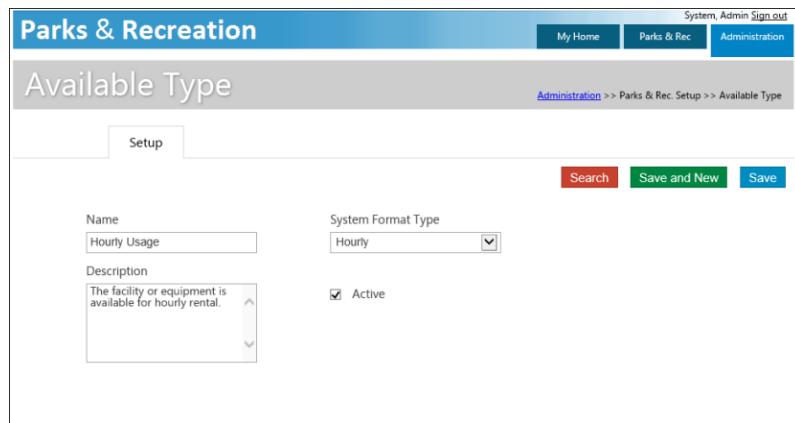


The image shows two screenshots of the Parks & Recreation application. The top screenshot is titled 'Add On Type' and shows a setup page with fields for 'Name' (e.g., 'Named Jerseys'), 'Description' (team jerseys that include team members' last names), 'Cashier Fee Template' (Select), 'Fee Name' (e.g., 'Last Name'), and 'Fee' (0.00). The bottom screenshot is also titled 'Add On Type' and shows a details page with fields for 'Name' (Named Jerseys), 'Description' (team jerseys that include team members' last names), 'Cashier Fee Template' (Select), 'Fee Name' (Last Name), 'Fee' (7.00), and 'Department' (Rec Staff-Mun). A red arrow points from the 'Supplemental Data' checkbox on the setup page to the 'Supplemental Data' checkbox and the 'Supplemental Data Type' dropdown on the details page.

Selecting the Allow Individual Sale check box allows the add-on item to be sold independently of a class or rental. For items designated for individual sale, you can use the Parks & Rec menu's Add On Purchase option or the Home tab's Purchase Add On Item option.

Available Type

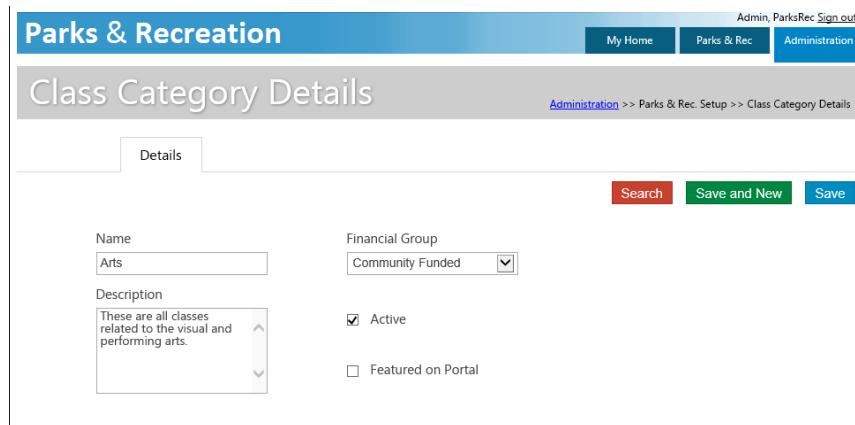
Available Type provides time schedules for programming activities or facilities. Examples of available type are half-day or multiple days.



System Format Type options are not available for update.

Class Category

Class Category provides user-defined categories for activity offerings. Categories should be determined by your organization prior to completing the setup process.



Class categories are displayed in the Activity Guide section of the citizen portal. When a user clicks a category, the list of available classes assigned to that category display.

The Featured on Portal check box causes the category to display in the Activity Guide section of the portal home page. When you select this check box for multiple class categories, the portal displays the categories alphabetically in an enhanced style format.

Class Group

Class Group defines a group of participants within a class or activity. Class groups can also define groups of contacts for a class or activity, for example, umpires or referees.

Parks & Recreation

System, Admin [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Class Group

[Administration](#) >> Parks & Rec. Setup >> Class Group

Setup [Search](#) [Save and New](#) [Save](#)

Name	Description
<input type="text" value="Beginners"/>	<p>This group is comprised of individuals who have no experience in the activity area.</p>
<input checked="" type="checkbox"/> Active	

Class Status

Class Status identifies the status codes available for activities, for example, active, inactive, on hold, and so on.

Parks & Recreation

System, Admin [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Class Status

[Administration](#) >> Parks & Rec. Setup >> Class Status

Setup [Search](#) [Save and New](#) [Save](#)

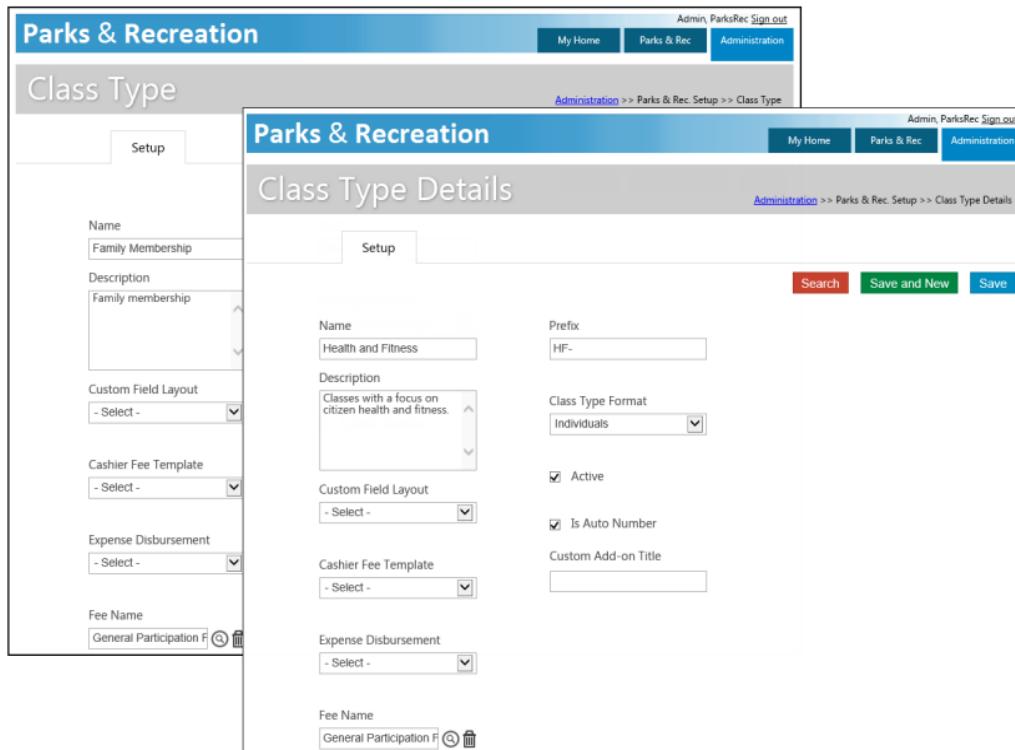
Name	System Status
<input type="text" value="Scheduled"/>	<input type="text" value="Open"/>
Description	
<p>The class is scheduled pending the number of participants who sign up.</p>	

The System Status list options are not available for update.

Class Type

Class Type describes the type of class, for example, athletic, general enrichment, or health and fitness. Class types also define teams, groups, or memberships, such as individual or family memberships. In this case, the Membership Period option in the Parks & Rec Setup group defines membership duration.

On the Class Type Format list, the Team type allows registrants to register an entire team at one time (for example, if a hockey league is made up of individual sponsored teams, the sponsor would register the entire team at one time). The Grouped Individual type allows for individuals to register individually, and then assigned to a team. For Team class types, the Registrants pane on the Class Details page is replaced by the Teams pane.



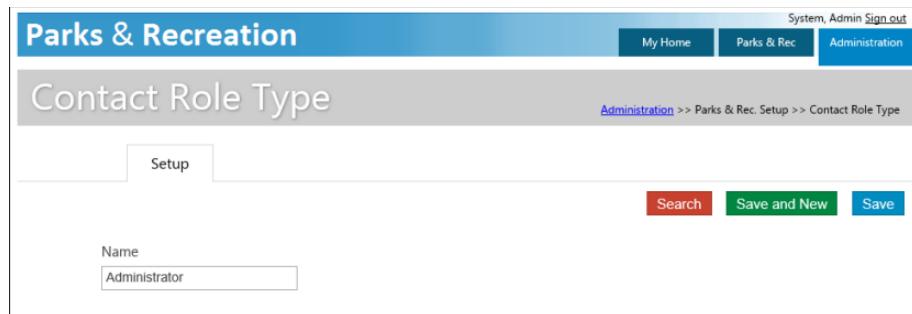
If you select a value for the Custom Field Layout list, the program assigns the custom layout to all classes to which this class type is assigned.

The Active check box, if selected, indicates that the class type is available to be assigned to new classes or is currently assigned to existing classes. The program does not allow you to delete class types that are attached to active class records. If a class type is not assigned to a class that is currently in the registration period and/or within the start and end date of the class, you can deactivate the type by clearing the Active check box on the Class Type record. In this case, once the class is deactivated, the class type cannot be assigned to new classes, but it continues to display on any existing classes to which it is assigned.

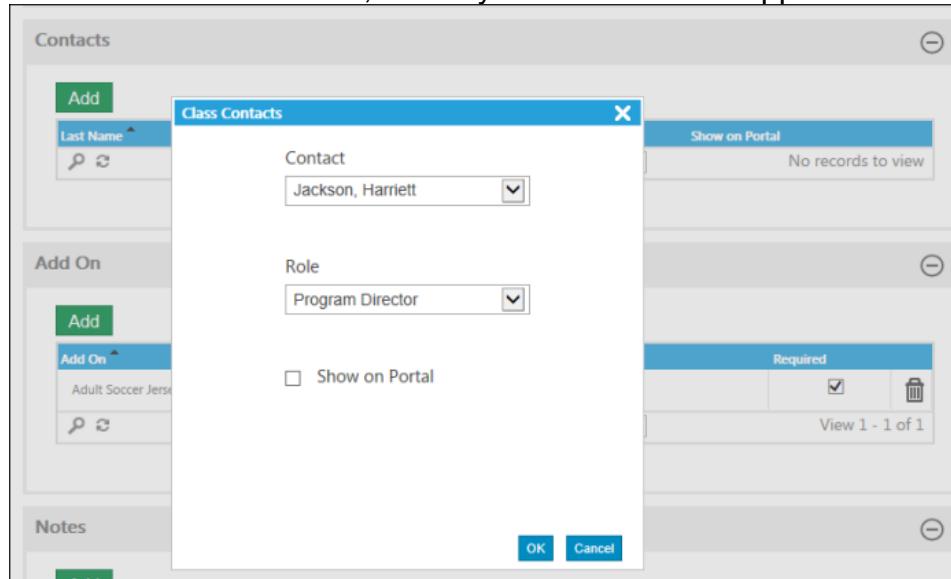
The Custom Add-on Title field defines a custom name for the Add On group that displays on the Class Details page for any class associated with the class type. The custom name also displays on the Summary page for administrative or portal registrations. If you do not define a custom name for an add-on, the default label Add On displays on the Class Details and registration pages.

Contact Role Type

Contact Role Type provides an identity for defined contacts, for example, employee, affiliate, sponsor, and so on.



When you assign contacts to a class or activity and you click **Add**, the Class Contacts dialog box includes the Role list, where you can select the applicable role for the contact.



Contact Type

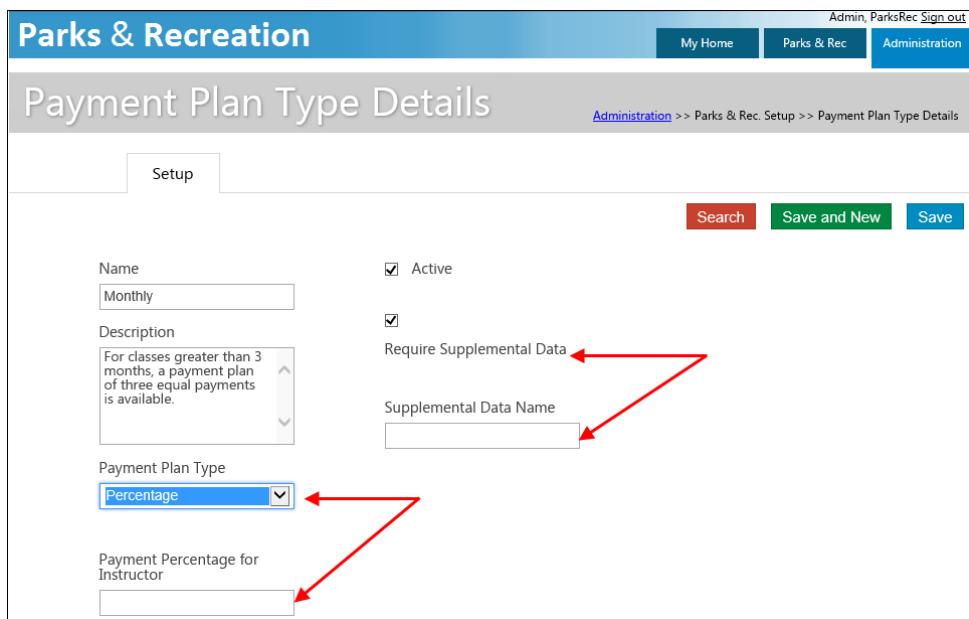
Contact Types maintains contact types for your organization. You cannot delete a contact type that is assigned to an active contact record. Once you have created contact type records, you can assign the types to contact records.



Payment Plan Type

Payment Plan Type creates user-defined payments plans that can be associated with program offerings. Available payment plan types are determined by your organization.

If you select the Require Supplemental Data check box, you must complete the Supplemental Data Name box.

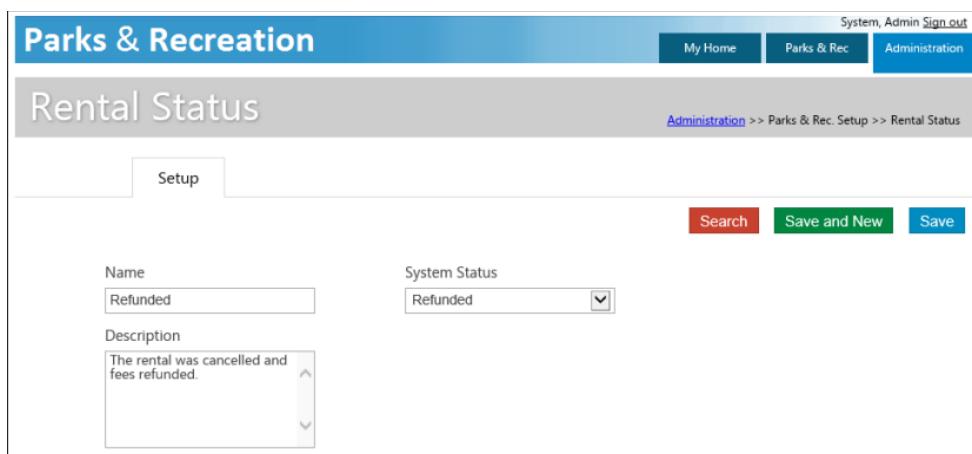


The screenshot shows the 'Payment Plan Type Details' page. The 'Require Supplemental Data' checkbox is checked, and the 'Supplemental Data Name' field is empty. Red arrows point from the text 'When you select the Require Supplemental Data check box, you must complete the Supplemental Data Name box.' to both the checkbox and the empty field.

When you add or update a payment plan type, you must complete the Payment Plan Type list by selecting Percentage or Flat Fee. If you select Percentage, the Payment Percentage for Instructor box is available and you must enter a value. If you select Flat Fee, when you are adding an instructor to a class on the Class Details page, you must complete the Amount box on that page.

Rental Status

Rental Status defines status levels for rental equipment or property.

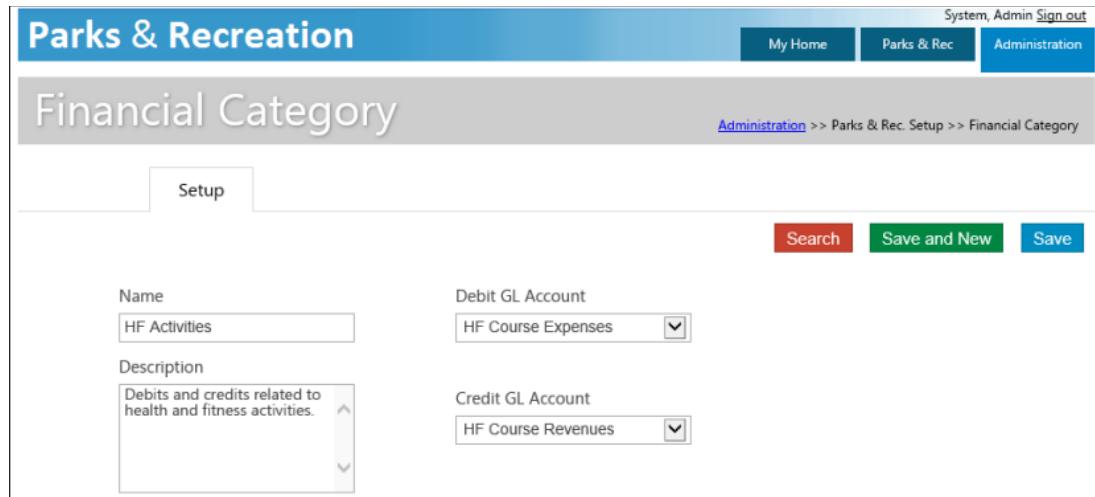


The screenshot shows the 'Rental Status' page. The 'System Status' dropdown is set to 'Refunded'. Red arrows point from the text 'The System Status list options are not available for update.' to the dropdown and the 'Refunded' status.

The System Status list options are not available for update.

Financial Category

Financial Category defines categories for financial expenses associated with your organization's recreation programs. The Debit GL Account and Credit GL Account lists assign program debits and credits to general ledger accounts maintained using the GL Account option in the Cashier Setup group.



Parks & Recreation

Financial Category

Administration >> Parks & Rec. Setup >> Financial Category

Setup

Name: HF Activities

Debit GL Account: HF Course Expenses

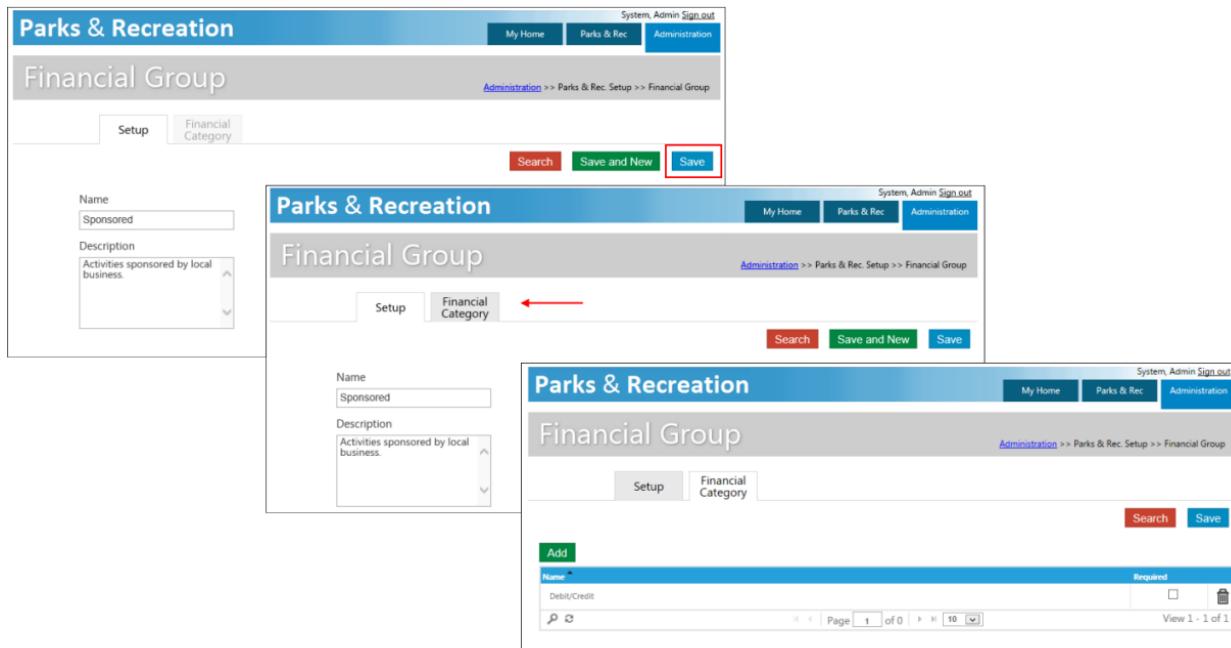
Description: Debits and credits related to health and fitness activities.

Credit GL Account: HF Course Revenues

Search Save and New Save

Financial Group

Financial Group maintains groups for program-associated financing. When you create financial groups, you can assign them to specific financial categories.



Parks & Recreation

Financial Group

Administration >> Parks & Rec. Setup >> Financial Group

Setup Financial Category

Name: Sponsored

Description: Activities sponsored by local business.

Search Save and New Save

Parks & Recreation

Financial Group

Administration >> Parks & Rec. Setup >> Financial Group

Setup Financial Category

Name: Sponsored

Description: Activities sponsored by local business.

Search Save and New Save

Parks & Recreation

Financial Group

Administration >> Parks & Rec. Setup >> Financial Group

Setup Financial Category

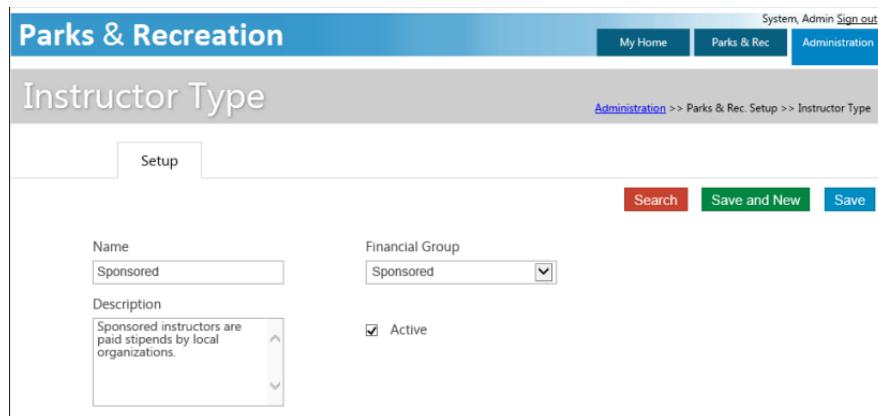
Add

Name	Debit/Credit	Required
HF Activities	Debit	<input type="checkbox"/>

Page 1 of 0 10 View 1 - 1 of 1

Instructor Type

Instructor Type specifies types for your program instructors, including associated financial group details for each type.



Parks & Recreation System, Admin [Sign out](#)

Instructor Type [Administration](#) >> Parks & Rec. Setup >> Instructor Type

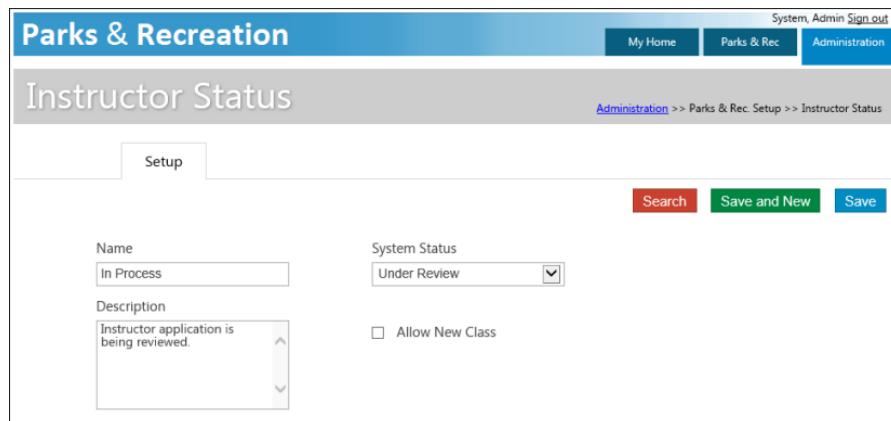
Setup Search [Save and New](#) [Save](#)

Name: Sponsored Financial Group: Sponsored [▼](#)

Description:
Sponsored instructors are paid stipends by local organizations. Active

Instructor Status

Instructor Status identifies status codes for program instructors.



Parks & Recreation System, Admin [Sign out](#)

Instructor Status [Administration](#) >> Parks & Rec. Setup >> Instructor Status

Setup Search [Save and New](#) [Save](#)

Name: In Process System Status: Under Review [▼](#)

Description:
Instructor application is being reviewed. Allow New Class

If the Allow New Class check box is selected, the instructor is available for new class assignments.

Location Status

Location Status identifies the status of locations where programs are offered.

Parks & Recreation

System, Admin [Sign out](#)

My Home Parks & Rec Administration

Location Status

[Administration >> Parks & Rec. Setup >> Location Status](#)

Setup

Search Save and New Save

Name	System Status
<input type="text" value="Closed Indefinitely"/>	<input style="width: 100px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px 5px;" type="text" value="Closed Indefinitely"/> <input type="button" value="▼"/>
Description	
<input style="width: 100%; height: 100px; border: 1px solid black; border-radius: 5px; padding: 2px 5px;" type="text" value="Facility is closed for major repairs."/>	

Values for the System Status list are not available for update.

Item Status

Item Status defines the status levels for rental locations or facilities (for example, an arena or pavilion).

Parks & Recreation

System, Admin [Sign out](#)

My Home Parks & Rec Administration

Item Status

[Administration >> Parks & Rec. Setup >> Item Status](#)

Setup

Search Save and New Save

Name	System Item Status
<input type="text" value="Closed Indefinitely"/>	<input style="width: 100px; height: 20px; border: 1px solid black; border-radius: 5px; padding: 2px 5px;" type="text" value="Closed Indefinitely"/> <input type="button" value="▼"/>
Description	
<input style="width: 100%; height: 100px; border: 1px solid black; border-radius: 5px; padding: 2px 5px;" type="text" value="The facility is closed for major repairs."/>	

Values for the System Item Status list are not available for update.

Location Type

Location Type provides a type definition for program locations, for example, a park or an arena.

Parks & Recreation

Location Type

Administration >> Parks & Rec. Setup >> Location Type

Setup

Name: Pool

Financial Group: Sponsored

Description: The community pool is a rental facility; maintenance is provided by local business.

Custom Field Layout: - Select -

Prefix: PL

Active:

Search | Save and New | Save

Item Type

Item Type manages type categories for rental item types, such as sports facilities or outdoor venues. The Custom Field Layout list defines the custom fields that can be configured to display on Rental Registration and on the facility rental registration portion of the citizen portal.

Parks & Recreation

Item Type Details

Administration >> Parks & Rec. Setup >> Item Type Details

Setup

Name: Arena

Prefix: AR-

Description: Ice arena

Custom Add-on Title:

Custom Field Layout: Layout

Active:

Search | Save and New | Save

Disclaimer

Disclaimer manages policy descriptions to associate with programs. Use the **Preview** button to view the disclaimer as it appears to users.

Disclaimer

Administration >> Parks & Rec. Setup >> Disclaimer

Setup

Name: Rental Hold Harmless

Active:

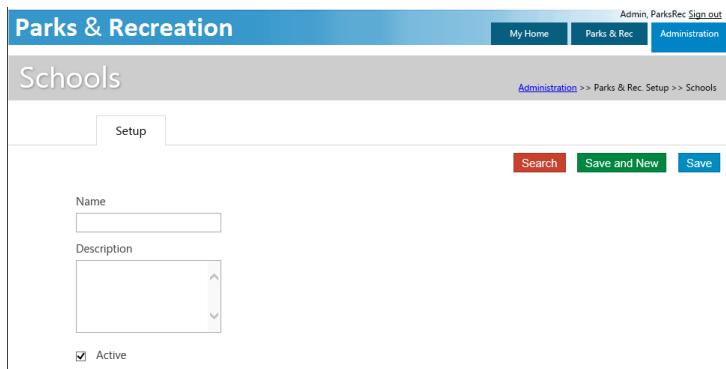
Preview

Description: Rentals are provided in as-is condition and all efforts have been made to ensure safety. However, renters accept responsibility for safety during use.

Search | Save and New | Save

Schools

Schools maintains records for schools that can be associated with your organization's programs.



Parks & Recreation Admin, ParksRec Sign.out
My Home Parks & Rec Administration

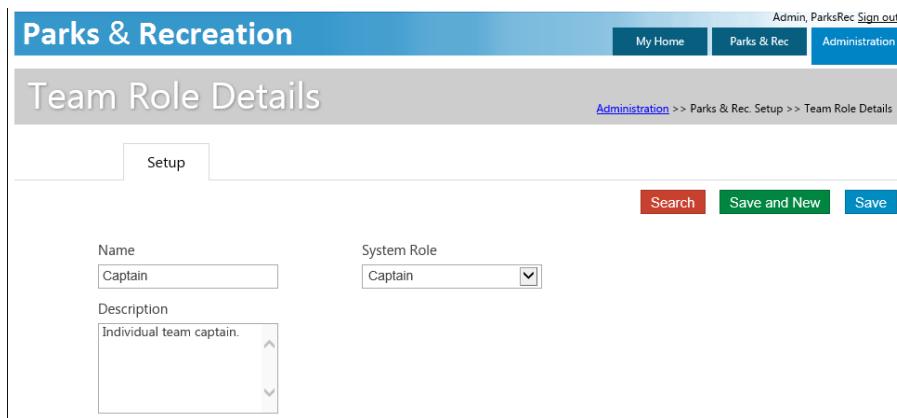
Schools Administration >> Parks & Rec. Setup >> Schools

Setup Search Save and New Save

Name
Description
Active

Team Role

Team Role creates roles to assign to team participants, for example, captain or coach.



Parks & Recreation Admin, ParksRec Sign.out
My Home Parks & Rec Administration

Team Role Details Administration >> Parks & Rec. Setup >> Team Role Details

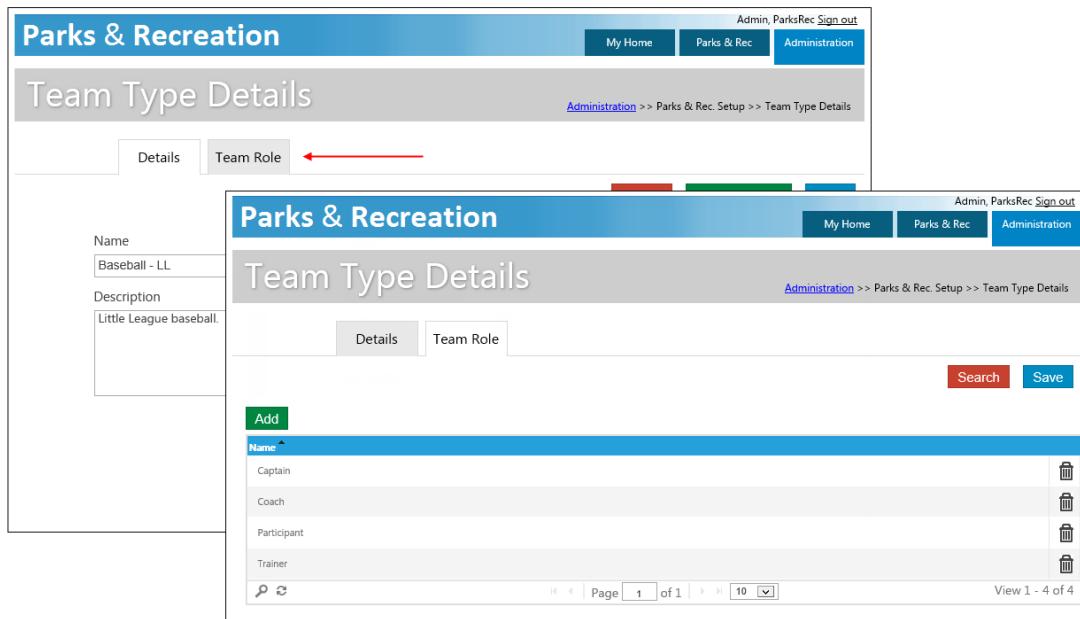
Setup Search Save and New Save

Name Captain System Role Captain
Description Individual team captain.

Team Type

Team Type provides type categories to assign to teams. When you save a team type record, the Team Role tab becomes active. Use this tab to assign roles to the team type.

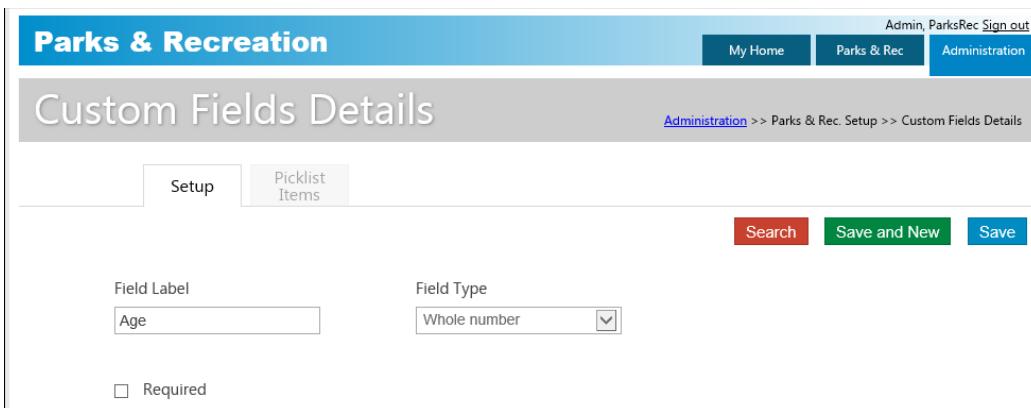
For each team type, the Captain role must be defined. If a team type does not have a defined captain role, you are not allowed to create a team record based on the team type.



The screenshot shows two views of the 'Team Type Details' page. The top view is a 'Details' view for a team named 'Baseball - LL' with a description of 'Little League baseball'. The bottom view is a 'Team Role' list view, showing roles: Captain, Coach, Participant, and Trainer. The list includes a search bar and a 'View 1 - 4 of 4' indicator.

Custom Fields

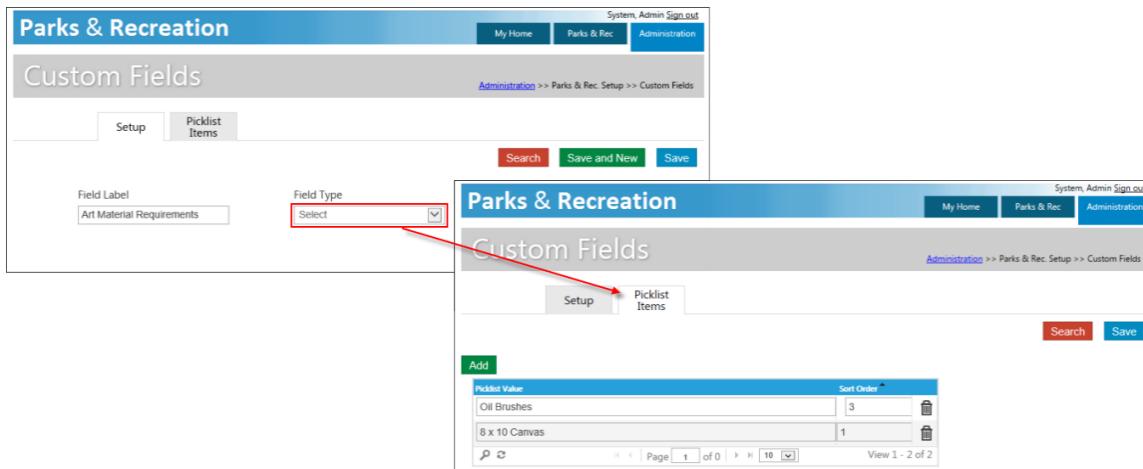
Custom Fields maintains custom fields to manage additional activity, team, or rental information.



The screenshot shows the 'Custom Fields Details' page with the 'Picklist Items' tab selected. It displays a field labeled 'Age' with a dropdown menu showing 'Whole number' as the field type. There is also a 'Required' checkbox. The page includes a search bar and buttons for 'Save and New' and 'Save'.

Selecting the Required check box causes the field to be a required value for end-users creating Tyler Parks and Recreation records.

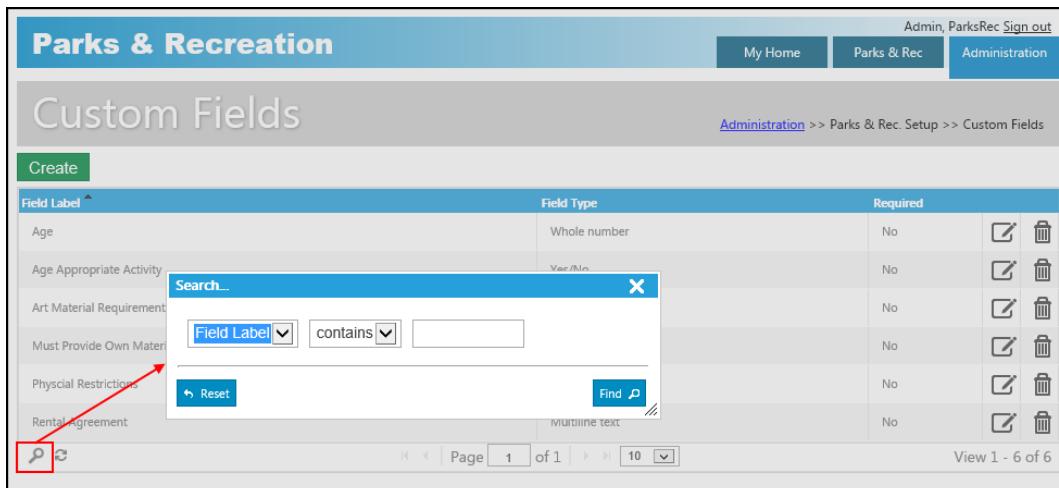
When the value of the Field Type list is Select, the Picklist Items tab is accessible. Use this tab to define the items that should be available from the defined field when it is assigned to a program.



When you create custom fields formatted as lists, the -Select- option is available. Use this option to indicate that a user should select an appropriate option when completing the field. Required fields for which a user selects a blank option will cause a validation error and prevent a record from saving.

When custom fields are attached to a record type, the Custom option is active on the Details page for records assigned to that type.

The Search option for custom fields allows you to define search criteria using the field type and value.



Field Label	Field Type	Required
Age	Whole number	No
Age Appropriate Activity	Var/Bln	No
Art Material Requirement	Var/Bln	No
Must Provide Own Mater	Var/Bln	No
Physical Restrictions	Var/Bln	No
Rental Agreement	Multiline text	No

Custom Field Layouts

Custom Field Layouts provides the display position or layout for custom fields.

Parks & Recreation

Custom Field Layouts Details

[Administration](#) >> Parks & Rec. Setup >> Custom Field Layouts Details

[Setup](#) [Custom Fields](#)

[Search](#) [Save and New](#) [Save](#)

Title	Age
<input type="checkbox"/> Use Tab 1	
Tab 1 Label	<input type="text"/>
<input type="checkbox"/> UseTab2	
Tab 2 Label	<input type="text"/>
<input type="checkbox"/> UseTab3	
Tab 3 Label	<input type="text"/>

Parks & Recreation

Custom Field Layouts Details

[Administration](#) >> Parks & Rec. Setup >> Custom Field Layouts Details

[Setup](#) [Custom Fields](#)

[Search](#) [Save](#)

[Add](#)

Field Label	Field Type	Tab Number	Sort Order
Age	Whole number	1	0

View 1 - 1 of 1

The Show for Registration check box determines whether a template is available. When this check box is selected, the template is available at the class level and the Tab fields are hidden.

Parks & Recreation

Custom Field Layouts Details

[Administration](#) >> Parks & Rec. Setup >> Custom Field Layouts Details

[Setup](#) [Custom Fields](#)

[Search](#) [Save and New](#) [Save](#)

Title	Age
<input checked="" type="checkbox"/> Show for Registration	

In this case, when you display the Custom Fields tab, the Tab Number field always displays Tab 1.

Parks & Recreation

Custom Field Layouts Details

[Administration](#) >> Parks & Rec. Setup >> Custom Field Layouts Details

[Setup](#) [Custom Fields](#)

[Search](#) [Save](#)

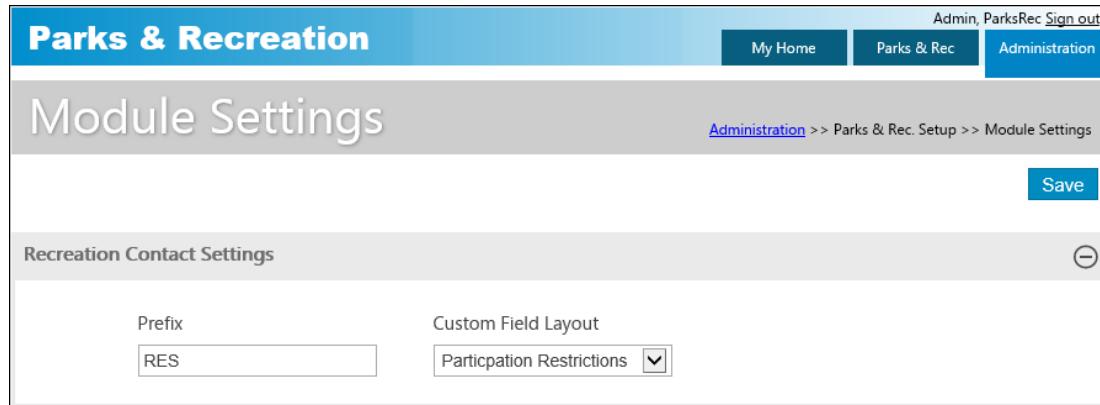
[Add](#)

Field Label	Field Type	Tab Number	Sort Order
Age	Whole number	1	0

View 1 - 2 of 2

Module Settings

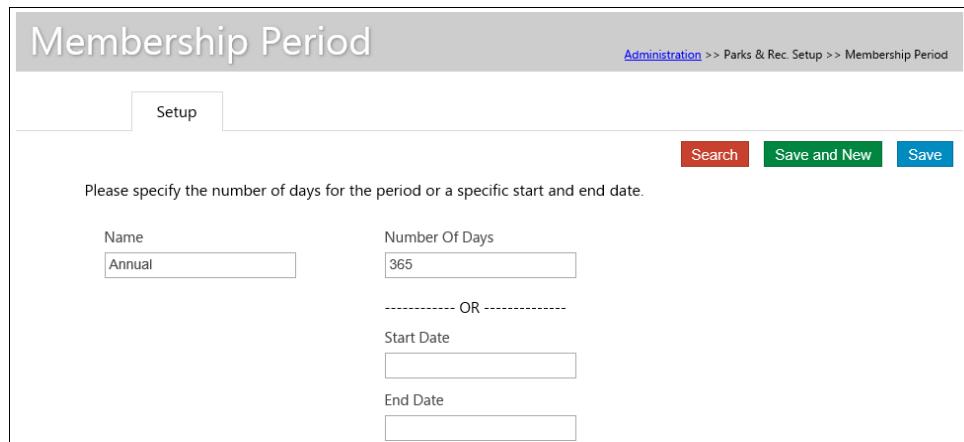
Module Settings defines a prefix for recreation contact numbers.



The Custom Field Layout lists affect what displays for the Custom options for Contact Details. The Recreation Contact Custom Field Layout identifies the custom fields that are displayed in the Custom option for Contact Details.

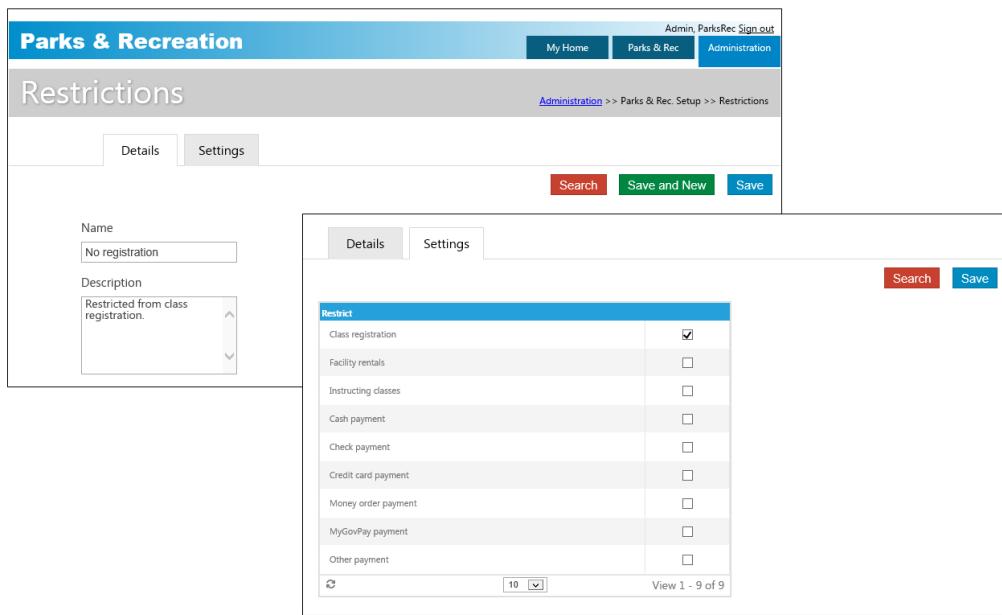
Membership Period

Membership Period defines the duration of memberships, for example, an annual membership. You can define the time by number of days or using a range of dates.



Restrictions

Restrictions manages restrictions that you can assign to contacts, preventing them from completing registrations, renting facilities, serving as instructors, and so on. You can also restrict registrants from using specific payment types.



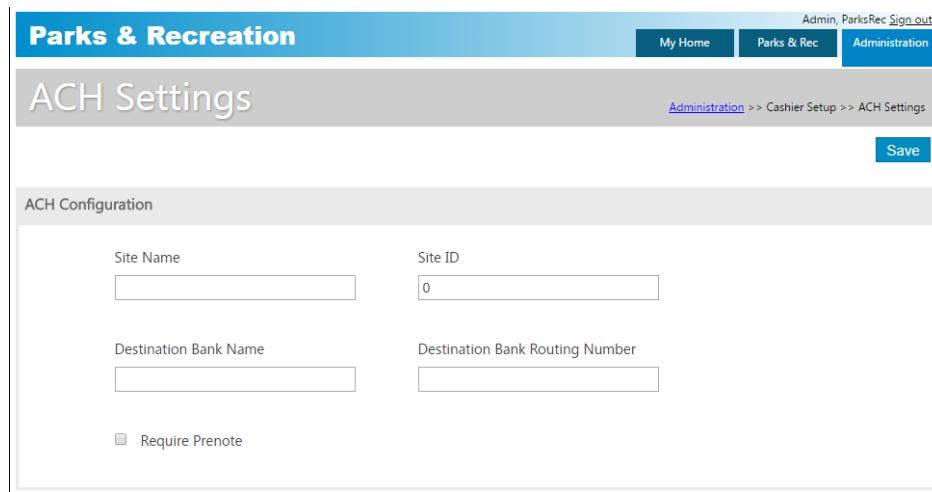
Once you have created restrictions, use the Restrictions group on the Contact Details page to assign a restriction to a contact.

Cashier Setup

The Cashier Setup pages define the accounting settings associated with activities. On these pages, you can define a fee schedule, identify expense types, and establish payment methods for your organization.

ACH Settings

ACH Settings establishes the automated clearinghouse (ACH) information needed for recurring bank draft billing and ACH payments for recurring memberships.



Parks & Recreation

Administration >> Cashier Setup >> ACH Settings

Save

ACH Configuration

Site Name:

Site ID:

Destination Bank Name:

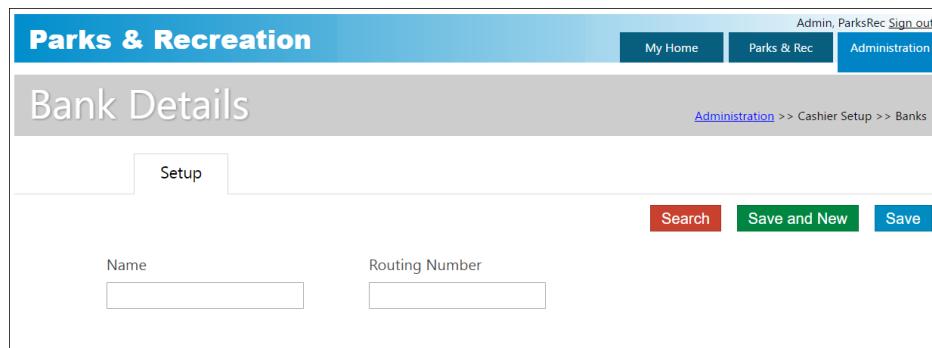
Destination Bank Routing Number:

Require Prenote

Selecting the Require Prenote check box enables the ACH Prenote File section of the ACH Processing page, and also makes the Pre-Approved check box available on the Contact Details page.

Banks

Banks establishes the names and routing numbers of the banks that are available in the Parks and Recreation application.



Parks & Recreation

Administration >> Cashier Setup >> Banks

Setup

Bank Details

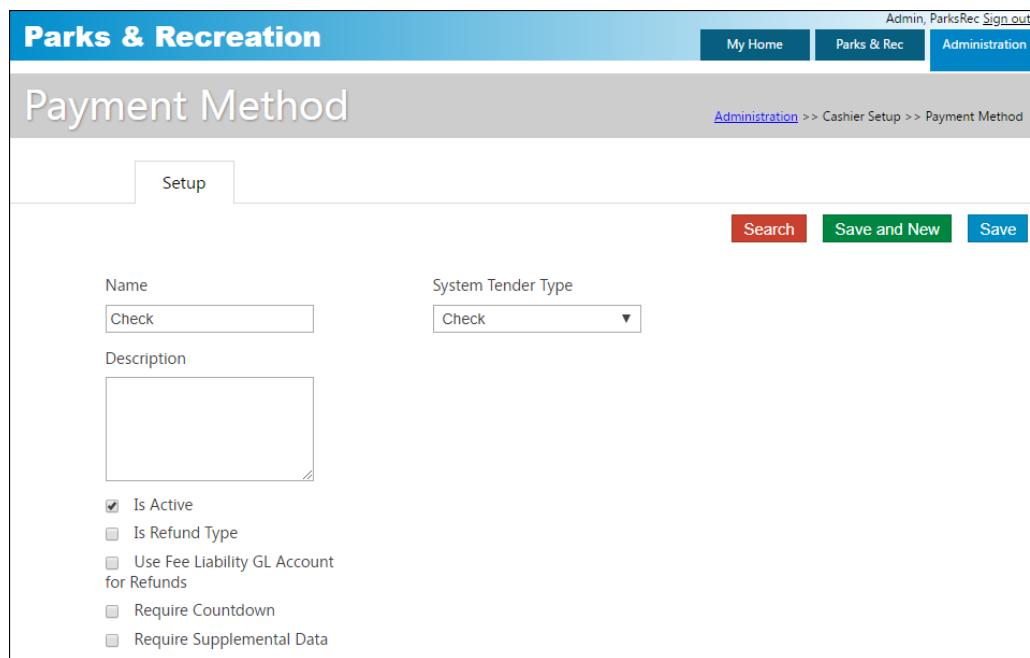
Search **Save and New** **Save**

Name:

Routing Number:

Payment Method

Payment Method establishes the types of payments accepted for activities and events provided by your organization.



Parks & Recreation

Admin, ParksRec [Sign out](#)

My Home Parks & Rec Administration

Payment Method

Administration >> Cashier Setup >> Payment Method

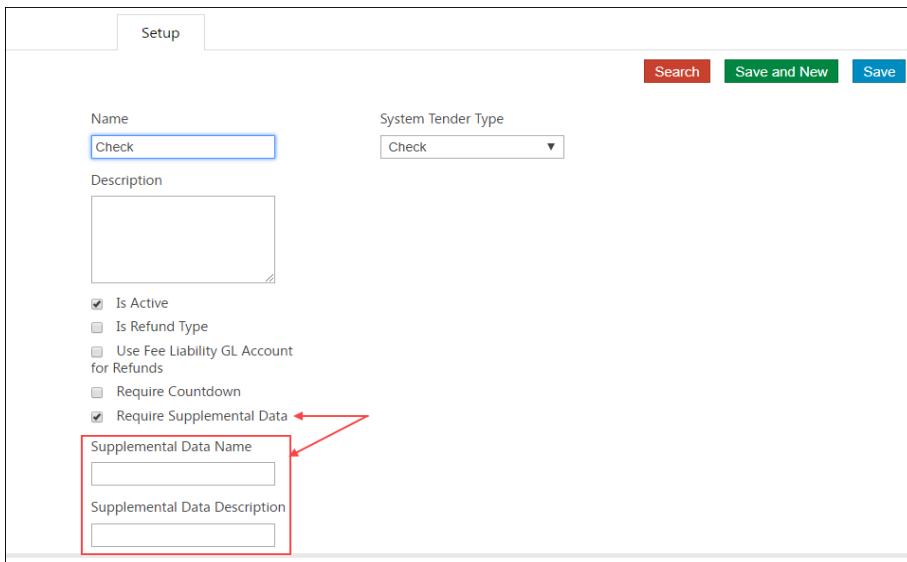
Setup

Name: Check System Tender Type: Check

Description:

Is Active
 Is Refund Type
 Use Fee Liability GL Account for Refunds
 Require Countdown
 Require Supplemental Data

- When the Is Refund Type check box is selected, this payment method can be used to issue refunds.
- If the value of the System Tender Type is Account Credit and the Use Fee Liability GL Account for Refunds check box is selected, the system uses the liability account that is associated with a fee when refunds are issued for that fee.
- If the Require Supplemental Data check box is selected, the page refreshes to provide the Supplemental Data Name and Supplemental Data Description.



Setup

Name: Check

System Tender Type: Check

Description:

Is Active

Is Refund Type

Use Fee Liability GL Account for Refunds

Require Countdown

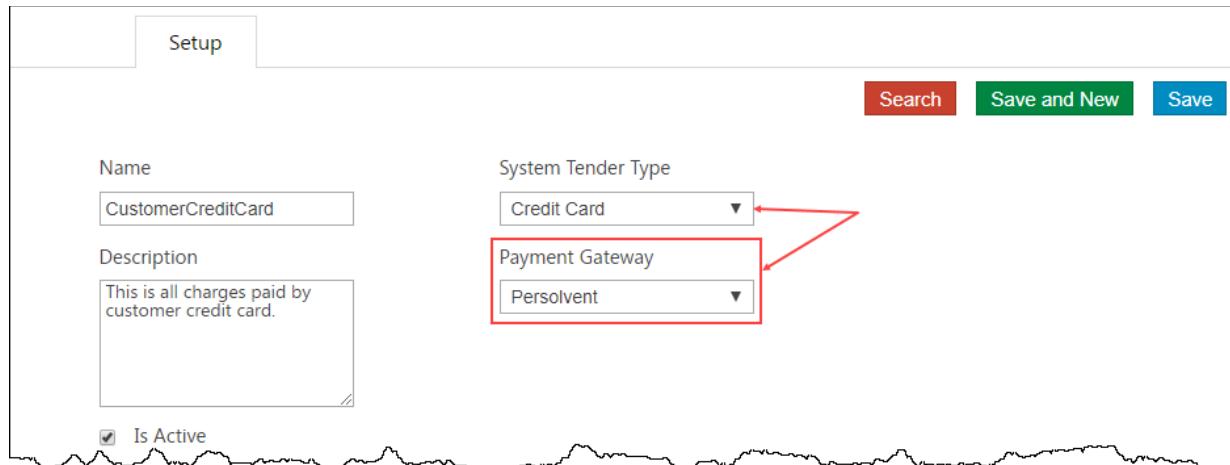
Require Supplemental Data

Supplemental Data Name:

Supplemental Data Description:

If the value of the System Tender Type list is Account Credit and this payment method is set up for all fees associated with a rental item or a class activity, and a payer has an account credit, the payer can use the credit to process payment for a rental item or class activity.

If the value of the System Tender Type list is Credit Card, the Payment Gateway list is available. This list defines the payment gateway to use for processing credit card payments. Additional fields may be available depending on the particular payment gateway selected.



Setup

Name: CustomerCreditCard

System Tender Type: Credit Card

Description: This is all charges paid by customer credit card.

Is Active

Payment Gateway: PersonSolvant

If the Payment Gateway is BridgePay and the Apply Credit Card Service Fee check box is selected, two additional check boxes appear to let you select whether a service fee is included in the BackOffice or Portal payment process.

Setup
Search

Name

Description

This is a credit card type for BridgePay

Is Active
 Is Refund Type
 Use Fee Liability GL Account for Refunds
 Require Countdown
 Require Supplemental Data

System Tender Type

Credit Card
 ▼

Payment Gateway

BridgePay
 ▼

Apply Credit Card Service Fee

Service Fee Calculation Type

- Select -
 ▼

Service Fee Amount

Include in BackOffice
 Include in Portal

Save and New
Save

Note: The merchant collects the service fee; BridgePay facilitates that process.

In the rental registration create process, the service fee displays above the total in the Order Summary section, and additional fee information and the phone number for BridgePay Support display in the Payment section.

Rental Registration Create

[Parks & Rec](#) >> Rental Registration >> Rental Registration Create

SELECT PAYER RENT ITEMS CONFIRM ORDER PAY INVOICE

Order Summary

Invoice To: Adams, Vicki

07-2018-000110 - Buffer Rental
7/20/2018 1:15:00 PM - 7/20/2018 1:45:00 PM

Fee for Buffer Rental: Fee Code	1	\$12.50
Subtotal	\$	12.50
		Service Fee: \$5.00

Total: \$17.50

Payment

Full Split/Partial

Payment Method

BridgePay

[Pay Now](#) [Invoice](#) [Cashiering](#)

Your normal service fee for credit card payment processing is as follows: \$5.00

Fees for online payments will be listed separately.

Questions may be addressed to BridgePay Support at 866-322-9894

[< Back](#)

This information also displays on the receipt.

The Require Countdown check box limits the time a citizen can be retained as registered in the class without providing payment. If the registrant does not pay within the countdown period, the class registration is removed and the spot is made available to other participants.

The options for the System Tender Type list are not available for update.

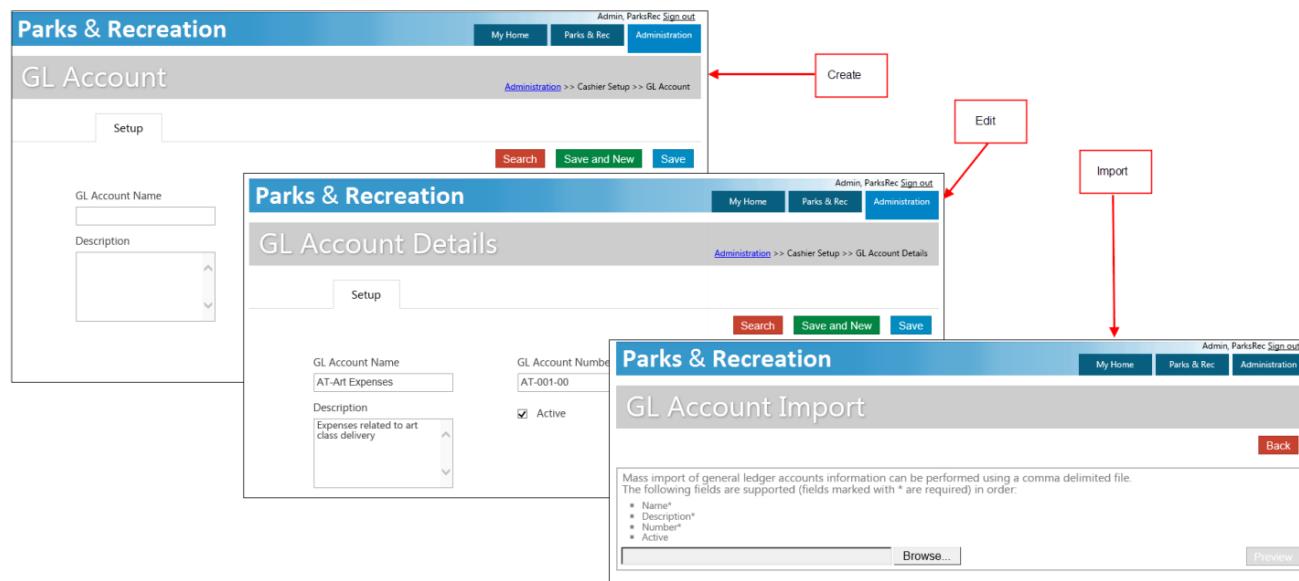
GL Account

GL Account maintains general ledger accounts for tracking expenses and revenues associated with your organization's program activities. When you display the GL Account page, it automatically provides a list of existing accounts.

Parks & Recreation		Admin, ParksRec Sign out
GL Account		Administration >> Cashier Setup >> GL Account
Create Import		
Name	Number	
AT-Art Expenses	AT-001-00	
Athletics Revenues	AH-001-00	
Class Credit Account	020-Class Credit Account	
Class Debit Account	010-Class Debit Account	
EQ-Equipment	EQ-1000	
Grants	GT-002-00	
HF Course Expenses	HF-Expenses-002	
HF Course Revenues	HF-Expense-001	
Miscellaneous Cash	CSH-Misc-001	
Rental Revenue	001 - Rental Revenue	

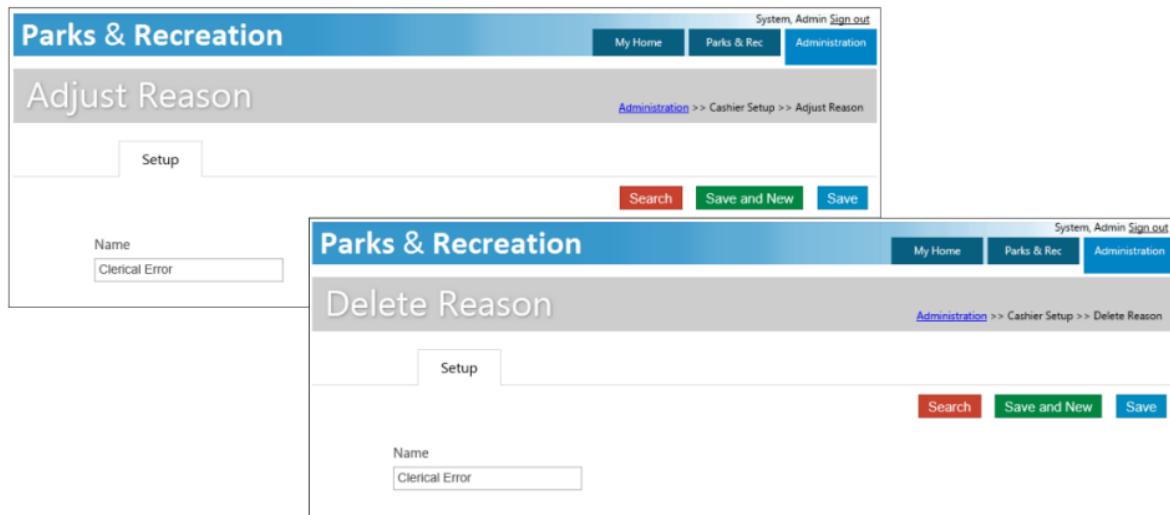
Page of 2 [View 1 - 10 of 11](#)

Click **Create** or click the **Edit** button to display the Setup page, or click **Import** to display the Account Import page.



Adjust Reason/Delete Reason

The Adjust Reason and Delete Reason options establish reason codes for transactions that are adjusted or deleted.

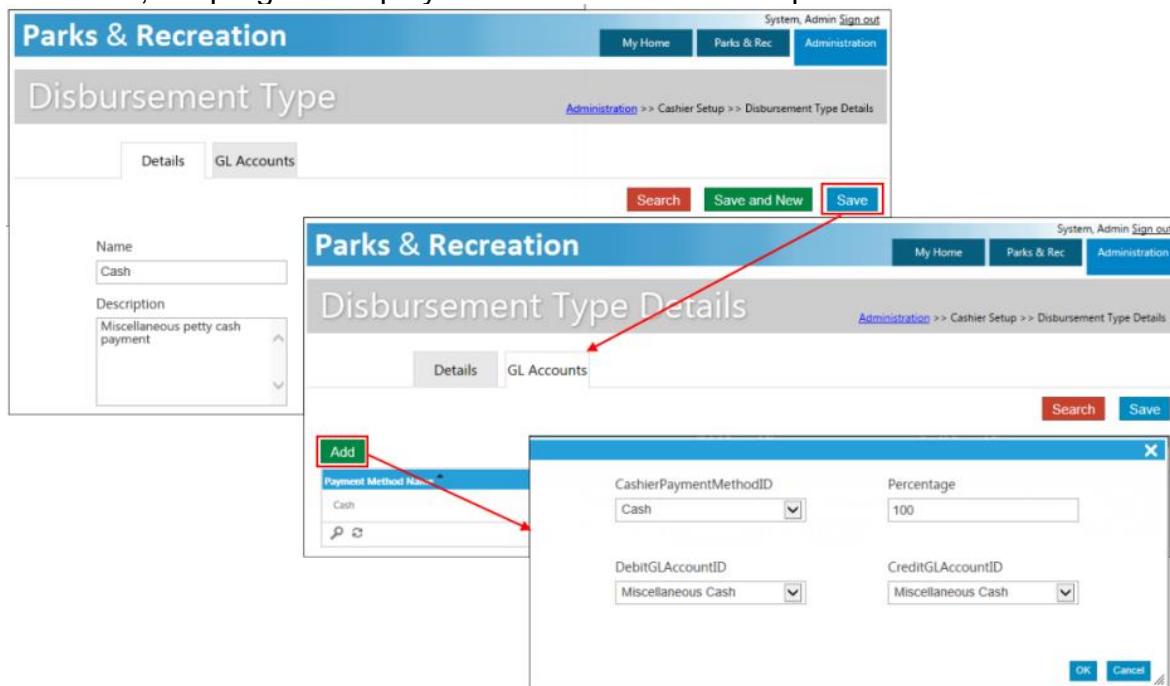


The image shows two overlapping windows from the Parks & Recreation software. The top window is titled 'Adjust Reason' and the bottom window is titled 'Delete Reason'. Both windows have a 'Setup' tab and 'Search', 'Save and New', and 'Save' buttons. The 'Name' field in both windows contains the text 'Clerical Error'.

Adjust and delete reasons cannot contain more than 20 characters of text.

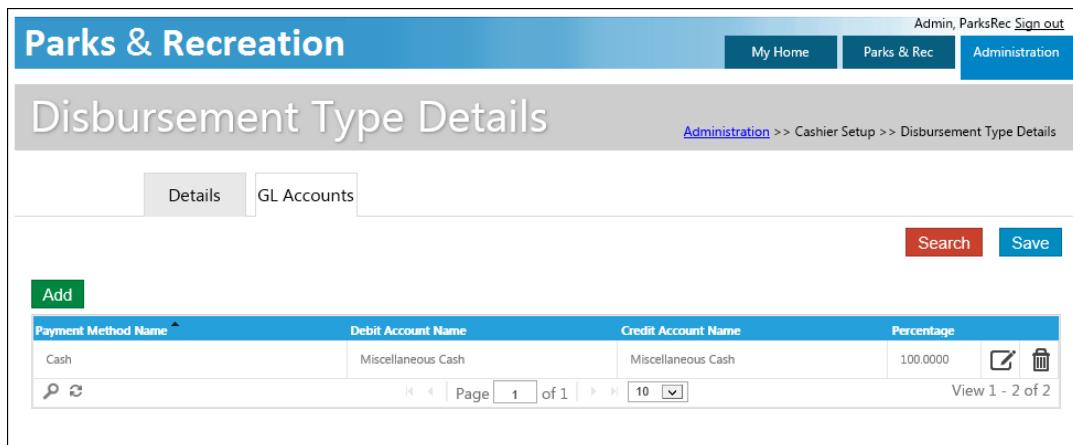
Disbursement Type

Disbursement Type maintains type records for recreation program disbursements. The GL Account tab associates specific general ledger accounts with disbursement types. When you click **Add**, the program displays the GL account detail options.



The image shows three windows related to 'Disbursement Type'. The main window is titled 'Disbursement Type' with tabs for 'Details' and 'GL Accounts'. The 'Details' tab is active, showing a 'Name' field with 'Cash' and a 'Description' field with 'Miscellaneous petty cash payment'. A red arrow points from the 'Save' button in this window to the 'Save' button in a modal dialog. The modal dialog is titled 'Disbursement Type Details' and contains tabs for 'Details' and 'GL Accounts'. The 'GL Accounts' tab is active, showing a table with a single row. A red box highlights the 'Add' button in this table. Another red arrow points from the 'Add' button to a sub-modal dialog. The sub-modal dialog is titled 'Payment Method Details' and contains fields for 'CashierPaymentMethodID' (set to 'Cash'), 'Percentage' (set to '100'), 'DebitGLAccountID' (set to 'Miscellaneous Cash'), and 'CreditGLAccountID' (set to 'Miscellaneous Cash').

When you create a disbursement type record, you must complete the Name box; if you do not enter a name, you cannot save the record. The percentage amount for a disbursement must equal 100. You cannot save a record if the value is less than 100 percent.

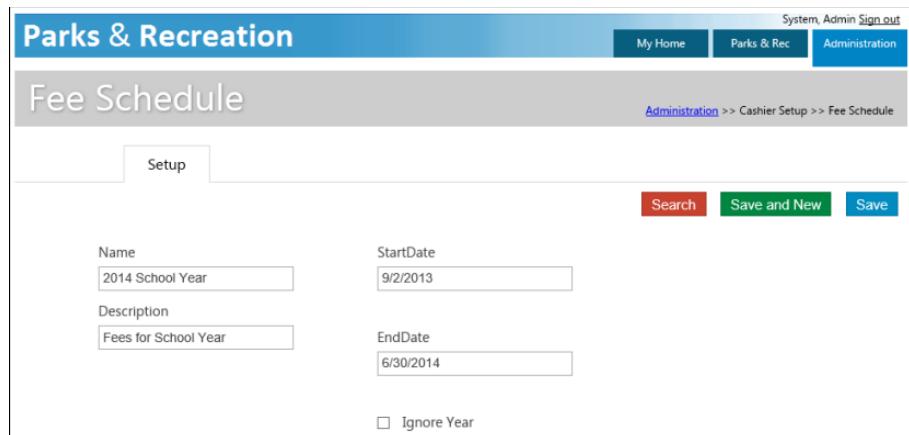


Payment Method Name	Debit Account Name	Credit Account Name	Percentage
Cash	Miscellaneous Cash	Miscellaneous Cash	100.0000

If a disbursement type is not currently in use, you can delete the record. If you attempt to delete a disbursement type that is actively being used by a Class Type Expense Disbursement, Contact Instructor Expense Disbursement, or Rental Item Expense Disbursement, the application displays an error and the delete is not successful.

Fee Schedule

Fee Schedule defines the start and end days for activity fees. You cannot delete a fee schedule that is currently in use.



Parks & Recreation

Fee Schedule

Administration >> Cashier Setup >> Fee Schedule

Setup

Name: 2014 School Year

Start Date: 9/2/2013

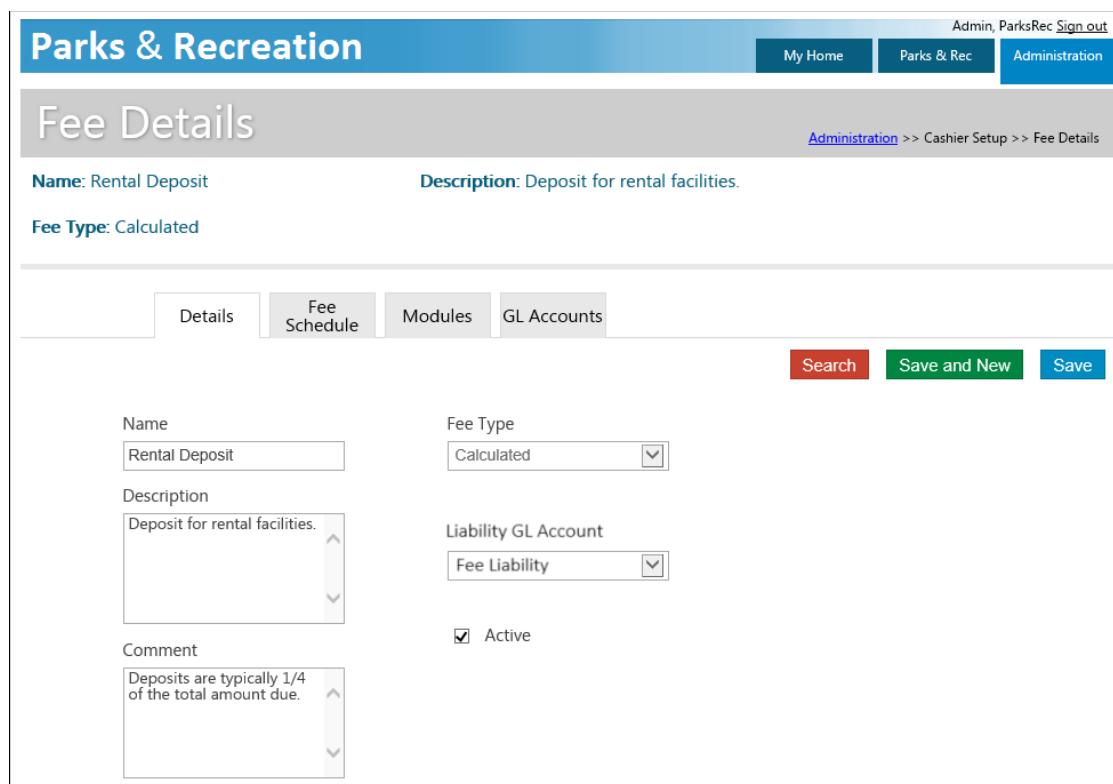
Description: Fees for School Year

End Date: 6/30/2014

Ignore Year

Search Save and New Save

Fee



Parks & Recreation

Fee Details

Administration >> Cashier Setup >> Fee Details

Name: Rental Deposit **Description:** Deposit for rental facilities.

Fee Type: Calculated

Details Fee Schedule Modules GL Accounts

Name: Rental Deposit

Fee Type: Calculated

Description: Deposit for rental facilities.

Liability GL Account: Fee Liability

Comment: Deposits are typically 1/4 of the total amount due.

Active:

Search Save and New Save

Fee maintains the details for activity charges. When you add a new fee or update an existing fee, you must assign a fee schedule and add at least one payment method with general ledger accounts.

The Liability GL account field allows you to associate a liability account with a fee. In order for the specified account to be used for refunds of this fee, the check box for Use Fee Liability GL

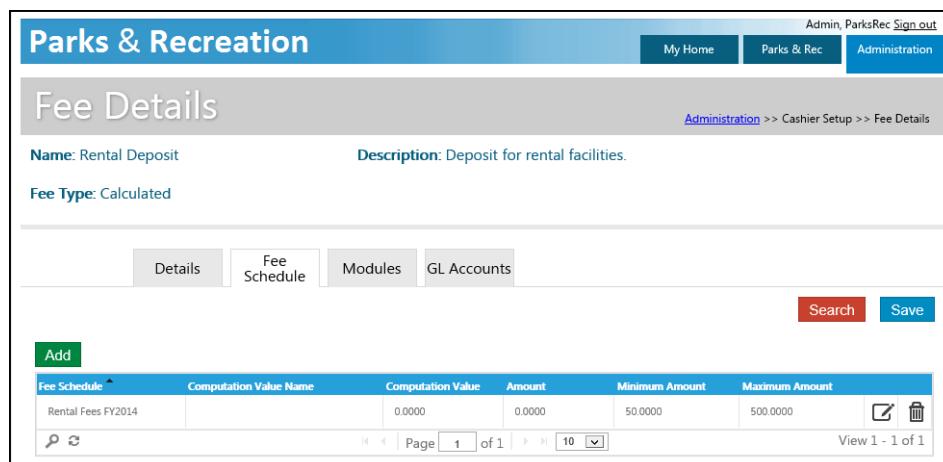
Account for Refunds must be selected in the Payment Method Details for the payment method used with this fee.

If you attempt to delete a fee that is currently assigned to an add-on item, class type, rental item, or fee template, the program displays an error message and does not allow you to delete the fee.

Note: Currently, fees must be designated as Recreation Management fees to be assigned to class records or applied to a template, and the only value available for Fee Type is Calculated.

If enabled in Integration Settings, the Charge Code field indicates the Munis AR charge code to associate with the fee. The AR charge code should be a CAT 1 charge code with the Use for Miscellaneous Cash check box selected. When you complete the AR Export for Invoices, you can use the Invoice Import program in Munis General Billing to import and then process the charges.

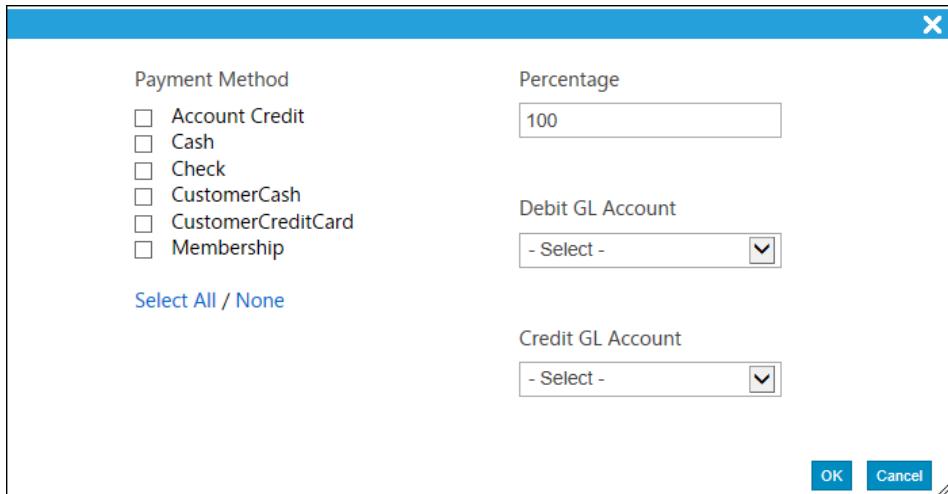
Fee Schedules are created using the Fee Schedule option. To assign a fee schedule for a fee, select the Fee Schedule tab and click **Add**. If you attempt to save a fee record prior to creating a fee scheduled, the program displays a reminder message.



The screenshot shows the Parks & Recreation Fee Details page. The top navigation bar includes 'My Home', 'Parks & Rec', and 'Administration'. The sub-navigation shows 'Administration >> Cashier Setup >> Fee Details'. The main content area has a 'Fee Details' title and fields for 'Name: Rental Deposit' and 'Description: Deposit for rental facilities'. A 'Fee Type: Calculated' note is present. Below are tabs for 'Details', 'Fee Schedule' (which is selected and highlighted in blue), 'Modules', and 'GL Accounts'. A 'Search' and 'Save' button are at the bottom. The 'Fee Schedule' table has columns: Fee Schedule, Computation Value Name, Computation Value, Amount, Minimum Amount, and Maximum Amount. One row is shown: 'Rental Fees FY2014' with '0.0000' in the Computation Value column and '50.0000' in the Amount column. A 'View 1 - 1 of 1' link is at the bottom of the table.

The Modules tab assigns the fee to a Parks and Recreation module and the GL Accounts tab maintains the general ledger account for the fee.

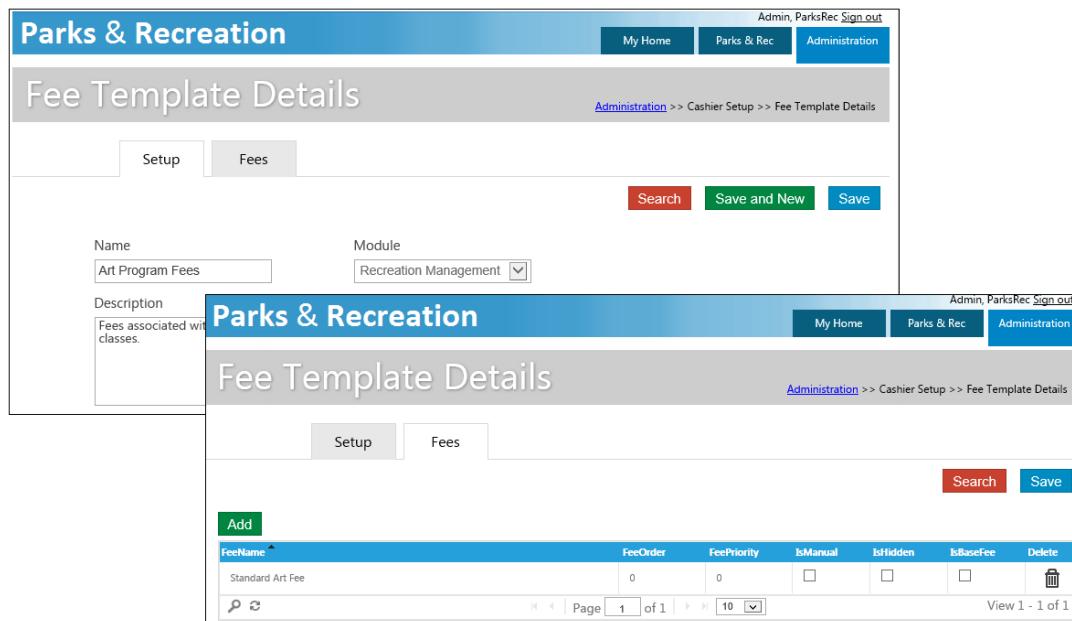
On the GL Accounts tab, the Payment Method check boxes allow you to specify a payment type or types for the fee.



When you add the payment method, the default value of the Percentage field is 100; this field is required and must contain a value of 0.0001 to 100, inclusive. You must assign a general ledger account for each fee associated with a payment method.

Fee Template

Fee Template assigns associated fees to a template, which you can then apply to an activity.



The Fees tab on the Details page includes the Is Base Fee check box. Use this check box to identify at least one fee on the template as the base fee for the class or rental. This allows payment processing to distinguish between base fees and administrative, add-on, tax, or other fees.

Expense Type

Expense Type categorizes expenses into user-defined groups.

Parks & Recreation

Expense Type

Administration >> Cashier Setup >> Expense Type

Expense Type Name	Cashier Expense Source
Rental Maintenance	Rental Item
Description	Prefix
Maintenance for rental items	RTL-
<input checked="" type="checkbox"/> Active	

Setup **Search** **Save and New** **Save**

Expense Method

Expense Method defines options for meeting expense obligations. If you select the Require Supplemental Data check box, the page refreshes to include the Supplemental Data box. Use this box to define the data required.

Parks & Recreation

Expense Method

Administration >> Cashier Setup >> Expense Method

Expense Method Name	<input type="checkbox"/> Require Supplemental Data
Cash	Search Save and New Save
Description	
Cash disbursements	

Parks & Recreation

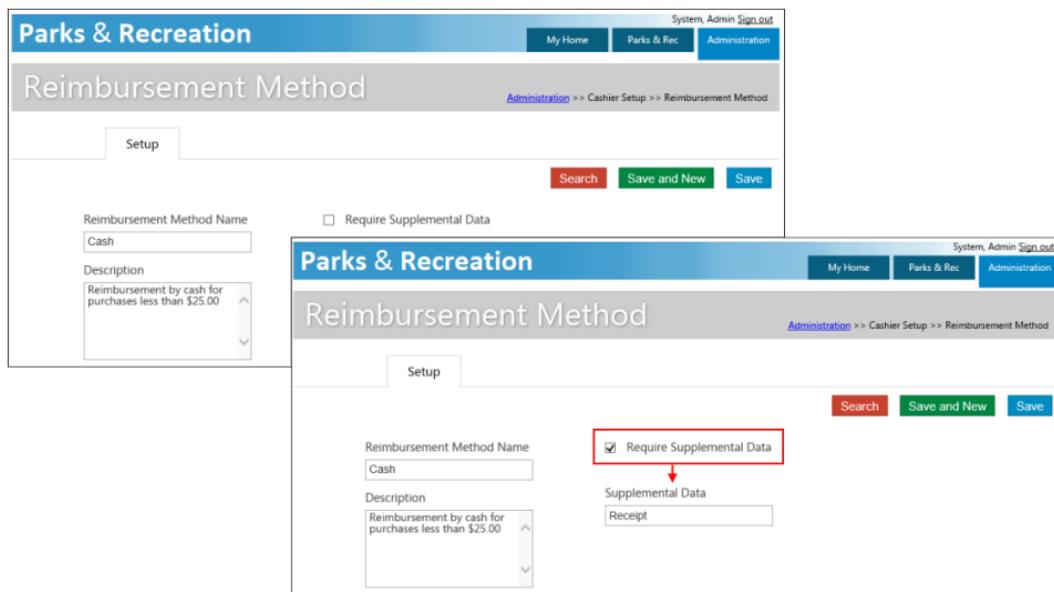
Expense Method

Administration >> Cashier Setup >> Expense Method

Expense Method Name	<input checked="" type="checkbox"/> Require Supplemental Data
Cash	Search Save and New Save
Description	
Cash disbursements	Supplemental Data

Reimbursement Method

Reimbursement Method defines options for providing reimbursement payments. If you select the Require Supplemental Data check box, the page refreshes to include the Supplemental Data box. Use this box to define the data required.



Parks & Recreation System, Admin Sign out

Reimbursement Method Administration >> Cashier Setup >> Reimbursement Method

Setup

Reimbursement Method Name: Cash

Description: Reimbursement by cash for purchases less than \$25.00

Require Supplemental Data

Search Save and New Save

Parks & Recreation System, Admin Sign out

Reimbursement Method Administration >> Cashier Setup >> Reimbursement Method

Setup

Reimbursement Method Name: Cash

Description: Reimbursement by cash for purchases less than \$25.00

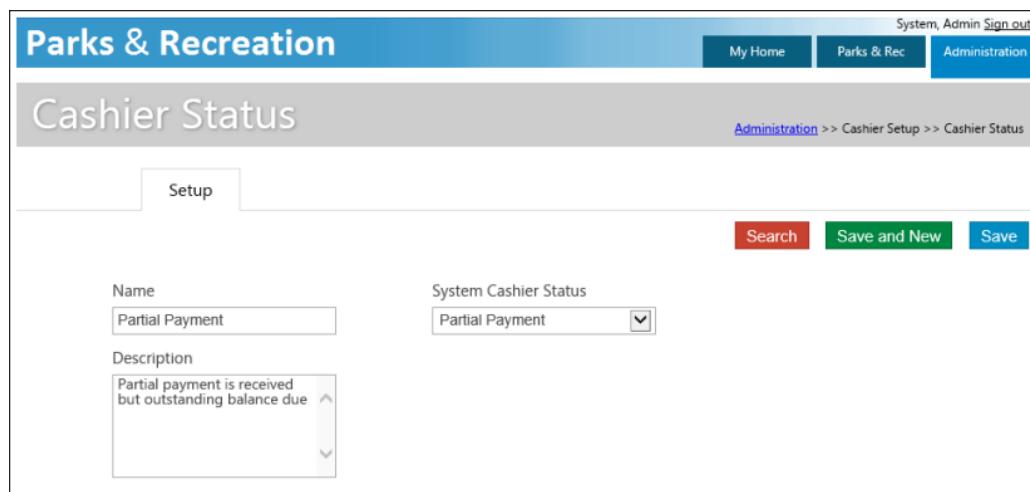
Require Supplemental Data

Supplemental Data: Receipt

Search Save and New Save

Cashier Status

Cashier Status provides status codes for payments.



Parks & Recreation System, Admin Sign out

Cashier Status Administration >> Cashier Setup >> Cashier Status

Setup

Name: Partial Payment

System Cashier Status: Partial Payment

Description: Partial payment is received but outstanding balance due

Search Save and New Save

The values for the System Cashier Status list are not available for update.

Discount

Discount defines the types of discounts that may be applied to individual classes, rentals or memberships.

Parks & Recreation

My Home
Parks & Rec
Administration

D
Discount

[Administration](#) >> [Cashier Setup](#) >> [Discount](#)

Create

Name	Description	Type	Discount	Edit	Delete
27-50	test	Age	\$26.00		
Employee	test	Employee	\$7.00		
Infant Discount	Discount for Infants	Age	\$10.00		
Paul Age	Paul Age	Age	\$5.00		
Paul Employee	Paul Employee	Employee	\$5.00		
Stefan Age	Stefan Age	Age	1.40%		
Stefan Custom	Stefan Custom	Custom	\$10.22		
Stefan Employee	Stefan Employee	Employee	4.00%		
test flags		Age	\$1.00		
Test FromToAge	test description	Age	5.00%		

🔍
⟳
Page of 2
10
View 1 - 10 of 12

The Discount page contains a table of existing discounts, with each row corresponding to a discount. To add a discount to the grid, click **Create**; to edit a discount, click the edit icon in the corresponding row. In either instance, the Discount Details page opens.

D
Discount Details

Setup
Search

Name*
Dollar Amount

Description
Percentage

Start Date*
End Date

Discount Type*

Available to Family Members
 Available to Classes

Available to Rentals
 Available to Memberships

Available to Non-Resident

The Name of the discount, the Discount Type, and the Start Date are required entries. A discount Dollar Amount or Percentage also must be entered.

To make this discount available for family members, classes, rentals, memberships or non-residents, select the appropriate check box at the bottom of the page. Note: Selecting *Available to Classes*, for example, does not mean the discount is applied automatically to all classes; it means the discount may be applied to whatever classes you choose.

Note: Changes will apply to newly added records only.

Discount Types

Discount Type	Description
Age	This discount applies to a contact's age. Selecting Age displays From Age and To Age fields. Any contact whose age falls within the range entered here is eligible for this discount. Both fields do not require entries; for example, if the discount is for seniors, only the From Age needs to be entered.
Employee	This discount applies to any employee who has the Employee check box checked on the Contact Details page. Selecting Employee displays an Available to Family Members check box. Selecting this check box makes family members also eligible for the employee discount.
Custom	This discount may apply to AAA members, veterans, boy scouts and other groups of your choosing. All custom discounts are displayed and available for selection on the Contact Details page. Selecting this check box also displays the Available to Family Members check box.
Multi-Family	<p>This discount applies when a contact registers other family members for the same class or membership. Selecting Multi-Family displays a Multi-Family Discount Setup section at the bottom of the page (see image below). Beginning with Family Member #2, this section contains fields for setting up dollar amount or percentage discounts that apply when additional family members are registered.</p> <p>For Family Member #2, select the discount dollar amount or percentage and click Add. Discount dollar amount and percentage fields for Family Member #3 display the Family Member #2 fields to let you add a discount for a third family member, and so on.</p> <p>You may change the order of the discounts by clicking the up or down arrow to the right of the fields.</p> <p>If the number of family members registered for the same class exceeds the number set up here, the last discount is applied to the additional members; for example, if multi-family discount is set up for family members 2 and 3 only and a fourth and fifth member are registered,</p>

Discount Type	Description
	<p>the discount applied to family member 3 is applied to members 4 and 5.</p> <p>Existing family class and membership registrations in determining whether a multi-family discount is eligible during a registration.</p> <p>During the registration payment process, the Order Summary displays a discount line item for each family member with the family member number included.</p>

Multi-Family Discount Setup Section

Discount Type*

Available to Classes

Available to Rentals

Available to Memberships

Available to Non-Resident

Multi-Family Discount Setup

Family Member #2

\$ or

%
↑ ↓
Delete

Family Member #3

\$ or

%
↑ ↓
Delete

Family Member #4

\$ or

%
↑ ↓
Delete

Family Member #5

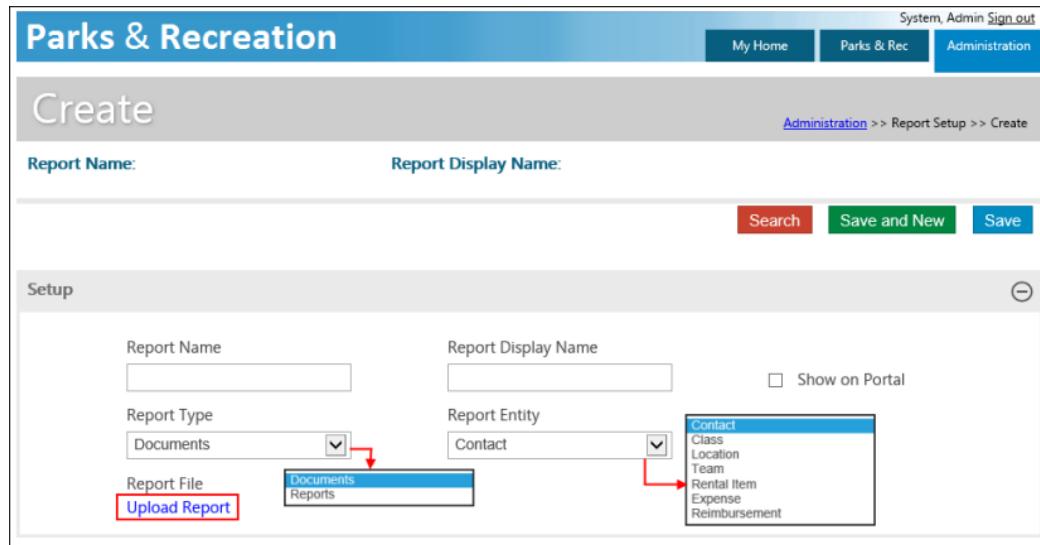
\$ or

%
Add

Save and New Save

Report Setup

The Report Setup pages define the reports that are available to Parks & Recreation users. If the Show on Portal check box is selected, the report is available on the citizen portal.



Parks & Recreation System, Admin Sign out

Create Administration >> Report Setup >> Create

Report Name: **Report Display Name:**

Setup

Report Name:
Report Display Name:
 Show on Portal

Report Type: Documents Reports

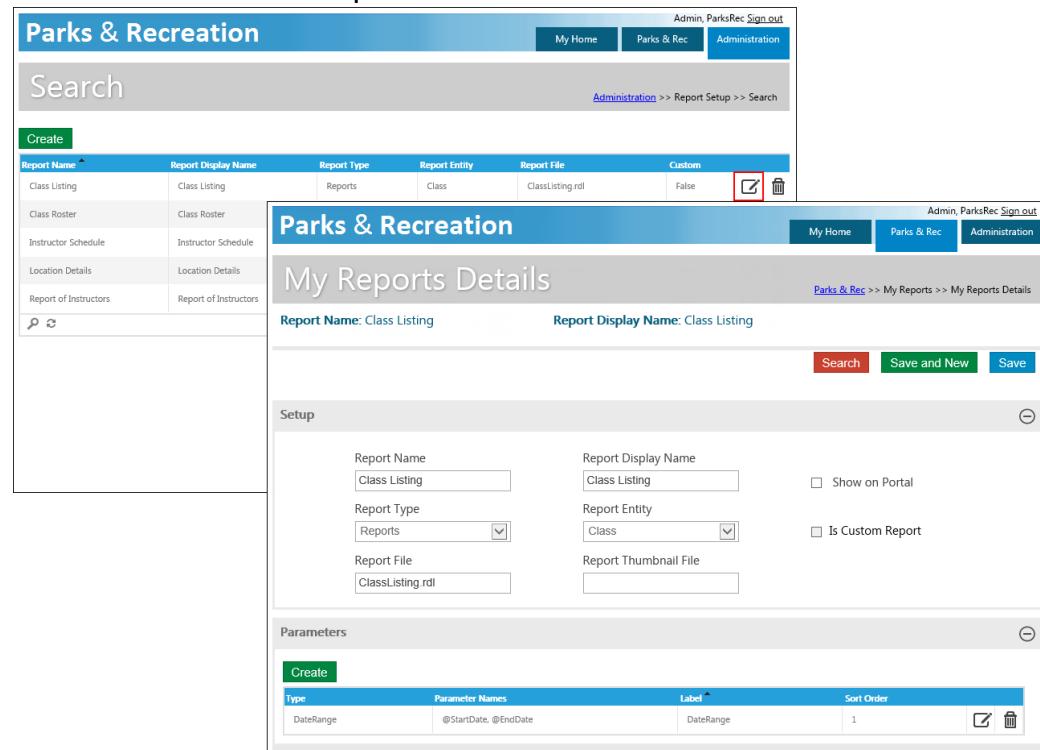
Report Entity: Contact Class Location Team Rental Item Expense Reimbursement

Report File: Upload Report

Search **Save and New** **Save**

Reports are created and maintained using Microsoft SQL Server Report services (SSRS) and made available in Tyler Parks and Recreation using the Create Report option.

Once reports are defined and uploaded, click **Search** to find available reports. Use the **Edit** button to maintain the report details.



Parks & Recreation Admin, ParksRec Sign out

Search Administration >> Report Setup >> Search

Create

Report Name	Report Display Name	Report Type	Report Entity	Report File	Custom
Class Listing	Class Listing	Reports	Class	ClassListing.rdl	<input checked="" type="checkbox"/> Delete
Class Roster	Class Roster				
Instructor Schedule	Instructor Schedule				
Location Details	Location Details				
Report of Instructors	Report of Instructors				

Parks & Recreation Admin, ParksRec Sign out

My Reports Details Parks & Rec >> My Reports >> My Reports Details

Report Name: Class Listing **Report Display Name:** Class Listing

Setup

Report Name: Class Listing **Report Display Name:** Class Listing Show on Portal

Report Type: Reports **Report Entity:** Class Is Custom Report

Report File: ClassListing.rdl **Report Thumbnail File:**

Parameters

Create

Type	Parameter Names	Label	Sort Order
DateRange	@StartDate, @EndDate	DateRange	1 Delete

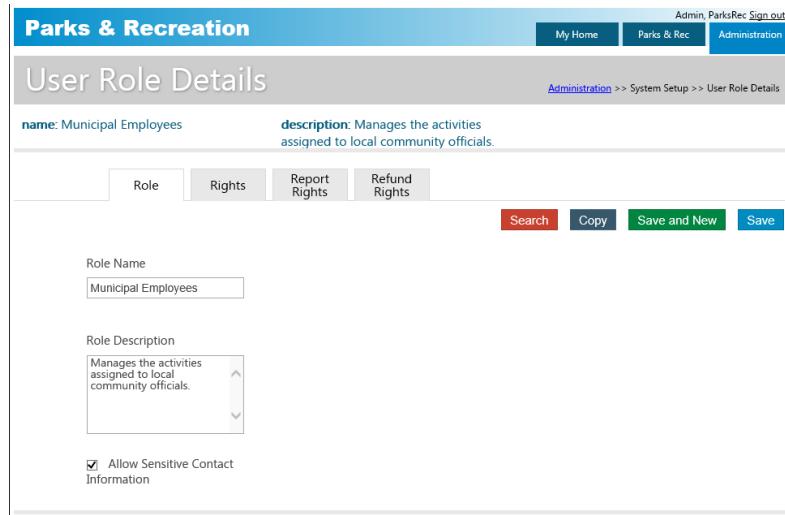
Search **Save and New** **Save**

System Setup

The System Setup pages define the user and user roles for your organization's Parks and Recreation application. It also establishes the settings that manage the look-and-feel of the citizen portal pages.

User Role

User Role maintains roles to which you can assign permissions. When you assign a role to a user, the permissions assigned to the role are automatically assigned to the user.



Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

User Role Details

[Administration](#) >> [System Setup](#) >> [User Role Details](#)

name: Municipal Employees **description:** Manages the activities assigned to local community officials.

Role Rights Report Rights Refund Rights

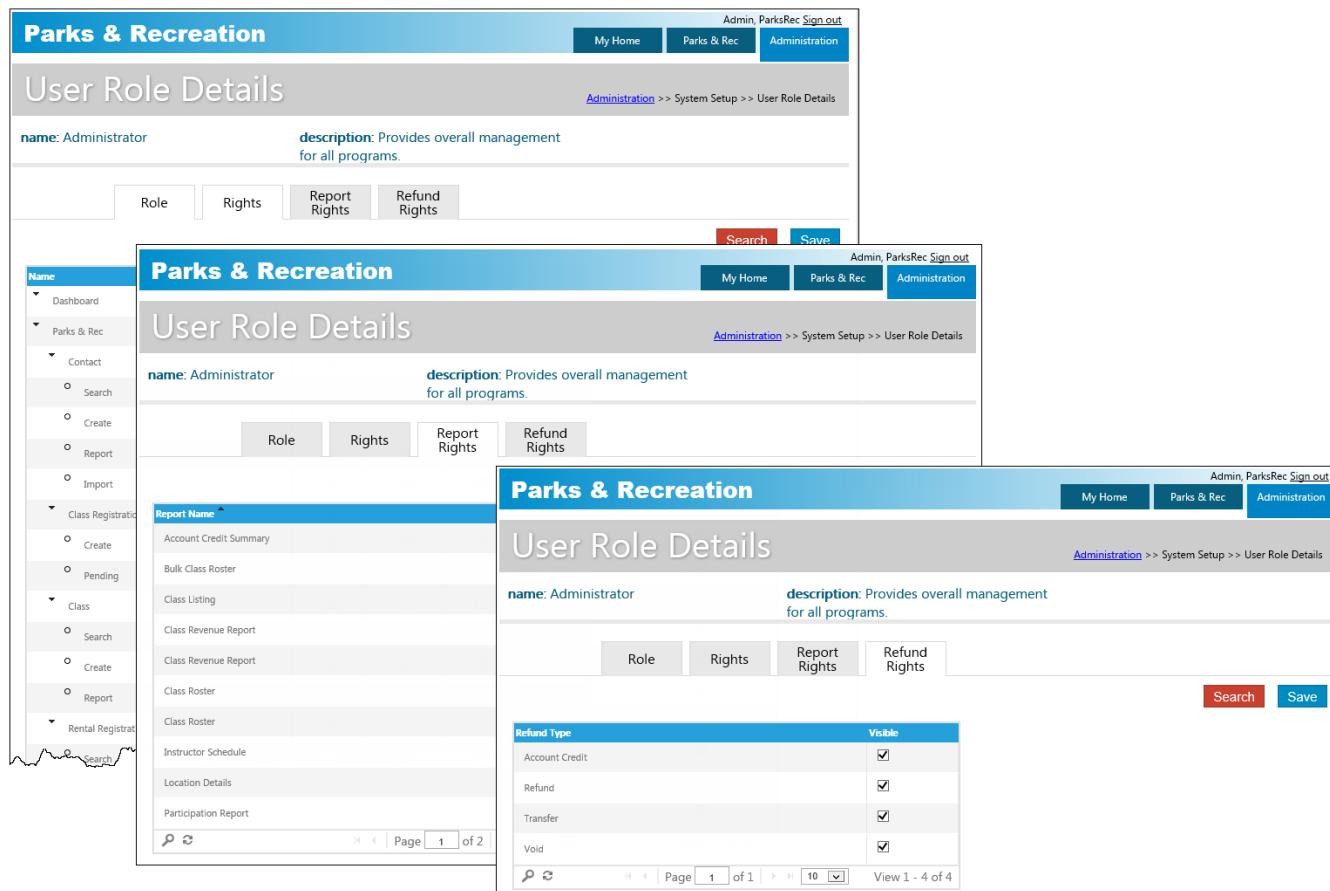
Search Copy Save and New Save

Role Name
Municipal Employees

Role Description
Manages the activities assigned to local community officials.

Allow Sensitive Contact Information

The Allow Sensitive Contact Information check box, if selected, restricts a user's access to sensitive information in contact records and reports. When you save a role, the Rights, Report rights, and Refund Rights tabs are accessible.

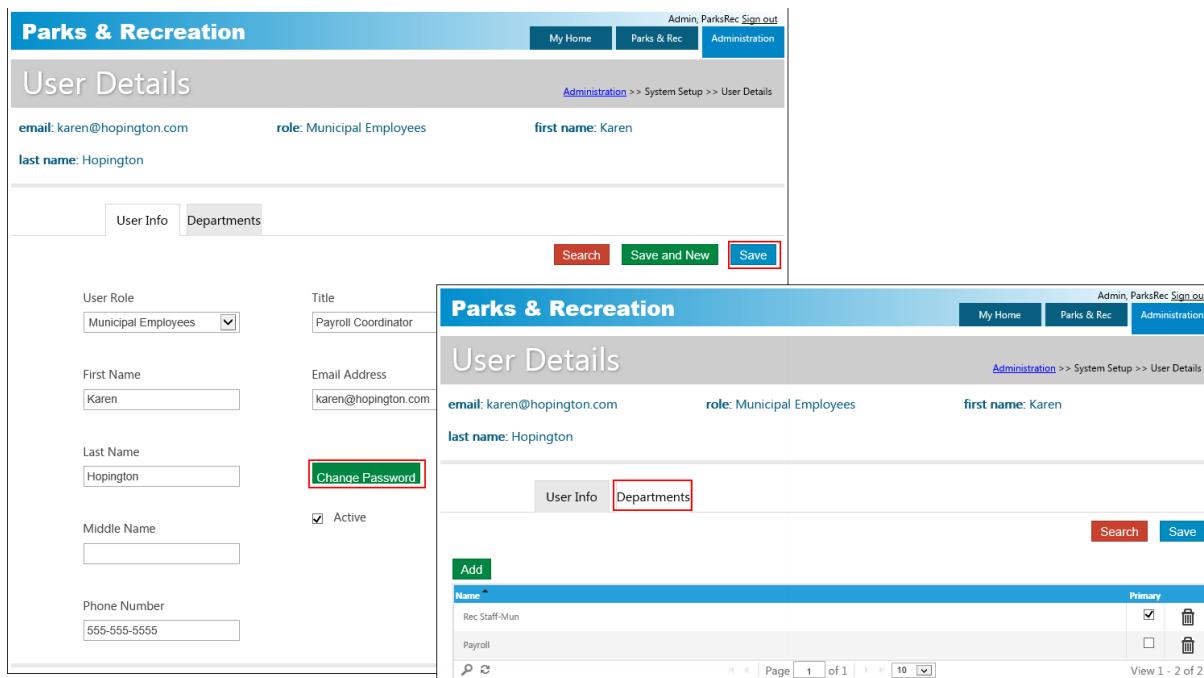


Click **Rights** to assign permissions to the role, click **Report Rights** to specify the reporting permissions available to users who are assigned to the role, and click **Refund Rights** to assign refund permissions to the role.

Refund rights assign permission to issue a refund, transfer, void, or account credit. When a user clicks Delete for class or rental registrations that are paid, only those options that correspond to the user roles permissions are available. If no refund rights have been assigned and a user is deleting a pending payment/invoiced registration, the user can still remove the registrant/rental record as no refund is made. However, if no refund permissions are granted and a registration has been paid, the program displays a message to the selected user that he/she cannot complete the refund process.

User

User maintains individual user records. Once you create and save a user record, the Departments tab is active and the Change Password option is available. Use the Department tab to assign the user to a defined department. For example, if you created a user record for the payroll clerk, you could assign that record to the Payroll department. The Primary check box indicates the user's primary department. The first department assigned to a user is automatically selected as their primary department, but you can change this if you assign more than one department to a user.



Parks & Recreation

User Details

email: karen@hopington.com

role: Municipal Employees

My Home Parks & Rec Administration

Administration >> System Setup >> User Details

last name: Hopington

first name: Karen

User Info Departments

Search Save and New Save

User Role

Municipal Employees

Title

Payroll Coordinator

First Name

Karen

Email Address

karen@hopington.com

Last Name

Hopington

Change Password

Middle Name

Active

Phone Number

555-555-5555

Parks & Recreation

User Details

My Home Parks & Rec Administration

Administration >> System Setup >> User Details

email: karen@hopington.com

role: Municipal Employees

first name: Karen

last name: Hopington

User Info Departments

My Home Parks & Rec Administration

Administration >> System Setup >> User Details

Search Save

Add

Name

Rec Staff-Mun

Payroll

Primary

</div

Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

User Import

[Administration](#) >> [System Setup](#) >> [User Import](#)

Mass import of User information can be performed using a comma delimited file. The following User fields are supported (fields marked with * are required) in order:

- Email Address*
- First Name*
- Last Name*
- Middle Name
- User Role*
- Phone Number
- Title
- Department
- Active

Note: Specify the user's "Active" status with (yes/no) or (true/false). Invalid specification will default to active

[Browse...](#) [Preview](#)

Department

Department manages department records. Use department records to identify personnel associated with your community's Parks and Rec administration or programs.

Parks & Recreation

System, Admin [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Department

[Administration](#) >> [System Setup](#) >> [Department](#)

[Setup](#)

[Search](#) [Save and New](#) [Save](#)

Name

Description

System Settings

System Settings define the parameters for your organization's Parks and Recreation pages, email messages, and reports.

System Settings

The System Settings fields define the time intervals for class registrations, time zone, and service end point values.

Parks & Recreation System, ParksRec Sign.out

My Home Parks & Rec Administration

System Settings

[Administration](#) >> [System Setup](#) >> [System Settings](#)

[- Collapse All -](#)

System Settings (−)

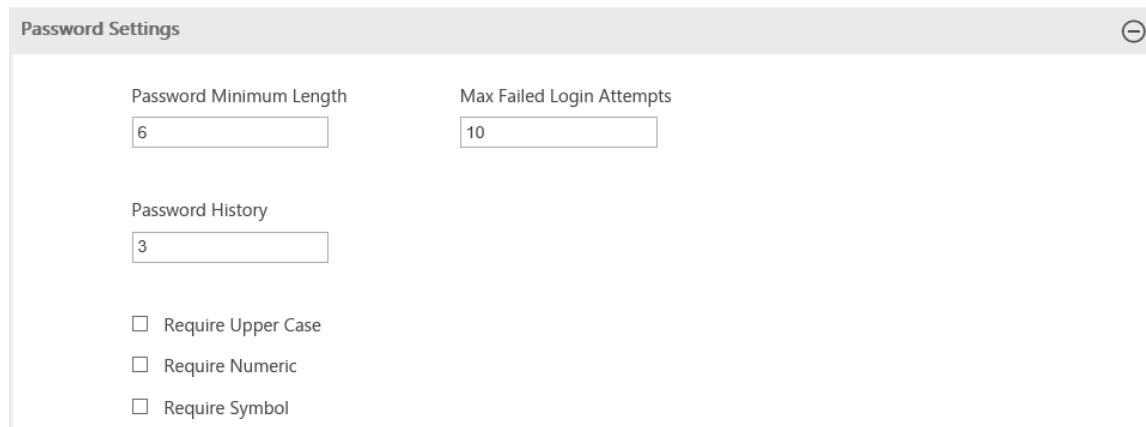
<p>Time Picker Interval</p> <input style="width: 100%;" type="text" value="5"/>	<p>Time Zone</p> <input style="width: 100%;" type="text" value="(UTC-05:00) Eastern Time"/>
<p>Page Size in Admin Site</p> <input style="width: 100%;" type="text" value="10"/>	
<p>File Storage Service Endpoint</p> <input style="width: 100%;" type="text" value="https://fdvmss.tylertech.com/TPAR/QA/Development/TPAR.Admin.12CI/Services."/>	
<p>Portal URL</p> <input style="width: 100%;" type="text" value="https://fdvmss.tylertech.com/TPAR/QA/Development/TPAR.Online.12CI/QA-Sara"/>	
<p> <input type="checkbox"/> Allow more than 100% GL Allocation </p>	
<p> <input type="checkbox"/> Payment Demo Enabled <input type="checkbox"/> Contact Phone Required </p>	
<p><input checked="" type="checkbox"/> Remove Heat Map</p>	

Setting	Description
Time Picker Interval	Determines the time intervals for class registrations. The minimum interval is 5, which allows classes to be scheduled using 5-minute intervals. For example, a class can be scheduled to begin at 5:05 or end at 7:35.
Time Zone	Indicates the time zone for your organization.
Page Size in Admin Site	Assigns the page size for all Administration groups.
File Storage Service Endpoint	Specifies the endpoint URL for your file storage service. If your organization uses Tyler Cashiering for payments, use the File Storage Service Endpoint field to specify the URL for your Tyler Cashiering application.
Portal URL	Specifies the portal URL. For the <i>Pay Now</i> and <i>Unregister</i> links to work correctly in the Waitlist Message Email Template, this entry is required.

Setting	Description
Allow More than 100% GL Allocation	Directs that on the Fee Details page, you can assign more than 100% from one payment method to more than one general ledger account.
Payment Demo Enabled	Provides a means for Implementation to test payment processing without completing an actual, real-time payment process.
Contact Phone Required	If selected, requires users to enter at least one telephone number to a contact record when they add a new contact or update an existing one.
Remove Heat Map	If selected, removes the map from the Parks and Recreation Administration Dashboard.

Password Settings

The Password Settings fields define the minimum password length, maximum failed login attempts, password history, and other password requirements.



Password Settings

>Password Minimum Length: 6

Max Failed Login Attempts: 10

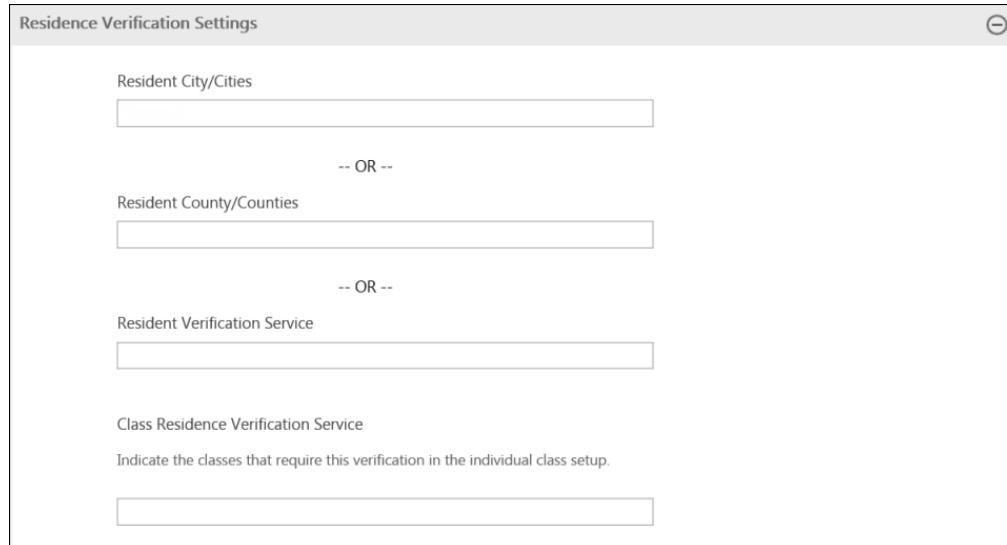
Password History: 3

Require Upper Case
 Require Numeric
 Require Symbol

Setting	Description
Password Minimum Length	Defines the minimum number of characters a password must contain.
Max Failed Login Attempts	Specifies the maximum number of failed login attempts allowed before the user is locked out.
Password History	Identifies the number of new passwords that must be set before a previous password can be used; for example, if <i>Password History</i> is 3, when a user sets a new password, the last three passwords cannot be used.
Require Upper Case	Select if password must contain at least one uppercase character.
Require Numeric	Select if password must contain at least one numeric digit.
Require Symbol	Select if password must contain at least one symbol (#, *, %, etc.).

Residence Verification Settings

The Residence Verification Settings define the resident verification service used for GIS location verification or provides the specific cities that define your organization residency restrictions.



For contact records, the Resident Verification Service field stores the URL for a GIS utility that verifies the contact's residency.

If your organization does not use a GIS verification service, the value of the Resident City/Cities or Resident County/Counties fields determine if the contact is identified as a resident or nonresident. If the user enters a value that matches the value of one of these fields, the user is identified as a resident. The Resident City/Cities and Resident County/Counties fields accept multiple city or county names, separated by a comma. When a contact record is added or updated, the residency verification checks against all the cities or counties listed to determine residency.

When you add or remove a city or county from the verification settings, the residency status for all contacts is automatically updated. However, if the Override Resident Status indicator is selected for a contact, the residency is not changed based on the values of these fields.

The Class Residence Verification Services field defines a class-level boundary service that works with the Check Specific Boundaries setting on the Class Details pages. If this setting is enabled, it enforces registration restrictions according to the specific boundaries defined in the Class Residence Verification Services field. If you have not defined a residents-only restriction, resident pricing is enforced according to the boundaries. When you register someone for a class using the Administration page, no enforcement is made. When citizens register using the portal, the Class Details page includes the Returning Player check box. If this check box is selected, specific boundaries are not enforced. If this check box is not selected and there is a resident-only restriction, only related family members that are in the specified boundary display in the Registrant list. If a resident-only restriction is not applied to the activity, resident pricing is enforced according to defined boundaries.

Email Settings

The Email settings define default settings and provides the template text for email notices distributed by your organization's Parks and Recreation department. Use the Test Email To box to verify email distributions.

The New User, New Contact, Change User Password, Change Contact Password Email and Waitlist Message Email templates provide email templates that you can customize using the symbols provided. The templates also include individual formatting options that you can use to vary the look-and-feel of the emails your organization distributes.

Report Settings

Report Settings define the path, server, and access details for reports.

Report Settings

Report Path /TylerParksAndRecreationRep	Report Parent Folder /TylerParksAndRecreationRep
Report Server Name QA-MUNIS:8000/ReportServer	Report Data Source Name TylerParksAndRecreationData
Report Server User ID tylerqaadmin	Report Data Source User ID munisadm
Report Server Password Gu1n4\$\$	Report Data Source Password *****

Site Contact Settings

Site Contact Settings stores a contact name and telephone number for your organization. The contact information can be included on receipts printed from the citizen portal.

Site Contact Settings

Site Contact Name	Site Contact Phone
-------------------	--------------------

Class Settings

Class Settings defines whether to have contacts moved automatically from the waitlist to the registration list when space becomes available. To turn on this setting, select the Auto Add Waitlist Contacts as Registrants check box.

Class Settings

<input checked="" type="checkbox"/> Default Auto Add Waitlist Contacts as Registrants

When this setting is turned on, the first person in line in the waitlist is moved to the registration list and sent an email, the template for which you will find in the Email Settings section of the System Settings page. This template includes links to let the user log in and, if the class is not free, pay the invoice for the class or unregister from the class. A user who unregisters is removed automatically from the class, and the next person on the waitlist is moved into the registrant position and sent an email.

If the contact declines a spot in the class, the process starts over with the next contact on the waitlist.

If the auto waitlist setting is turned on and the capacity of a class increases by however many seats, waitlist contacts will be added to the class based on the number of seats available.

Auto Add Waitlist Contacts as Registrants is a global setting; however, the setting also appears on individual classes so that you may override the global setting where desired.

Note: A user who chooses to go on the waitlist through the portal receives a message explaining that when a slot in the class opens, he or she will be added to the class and invoiced automatically and will be asked to accept or decline.

Portal Settings

Portal Settings provides the HTML and layout details that define the citizen portal page. It also designates hyperlink settings, logo, and background parameters.

Portal Settings

The Portal Settings box defines the page size and a customized title for your pages.

Portal Settings

Page Size	Portal Display Name
9	St. Louis County Parks and Rec (Maximum 35 characters)
Portal Disclaimer Text	
<input type="text"/>	
Default Sort Column	Default Sort Direction
Class	Ascending
Cart Limit on Rental Items	<input checked="" type="checkbox"/> Allow Payment on Portal <input checked="" type="checkbox"/> Allow Invoicing on Portal <input checked="" type="checkbox"/> Allow Invoice Payment on Portal
3	
Google Analytics Tracking Code	
Create a Google Analytics account at https://www.google.com/analytics/ and paste the Tracking Code here.	
<pre><script> (function(i,s,o,g,r,a,m){i['GoogleAnalyticsObject']=r;i[r]=i[r] function(){ (i[r].q=i[r].q []).push(arguments),i[r].l=1*new Date();a=s.createElement(o), m=s.getElementsByTagName(o)[0];a.async=1;a.src=g;m.parentNode.insertBefore(a,m) })(window,document,'script','//www.google-analytics.com/analytics.js','ga'); ga('create', 'UA-64724217-1', 'auto'); ga('send', 'pageview'); </script></pre>	

The Portal Display Name provides the name that displays in the page banner for your organization's portal page. The Portal Disclaimer Text box contains a waiver statement or terms and conditions that display on the Email page for portal registrations. If you enter text in this box, the Email page includes an Accept check box that users must select to successfully complete a registration. If you do not enter text in this box, there is no waiver text or Accept check box included on the Email page of the portal.

The Default Sort Column and Default Sort Direction lists define the column by which searches on the citizen portal of Tyler Parks and Recreation sort and the sorting order they use. Available columns by which to sort citizen portal searches include Class Name, Description, Date, Fee or Age, and searches can be set to sort in ascending or descending order.

The Cart Limit on Rental Items field defines the number of rental items an individual registrant may reserve at one time.

The Allow Payment on Portal check box determines whether all credit card payments are enabled or disabled on the portal. To enable all credit card payments, select the box. To disable, deselect the box.

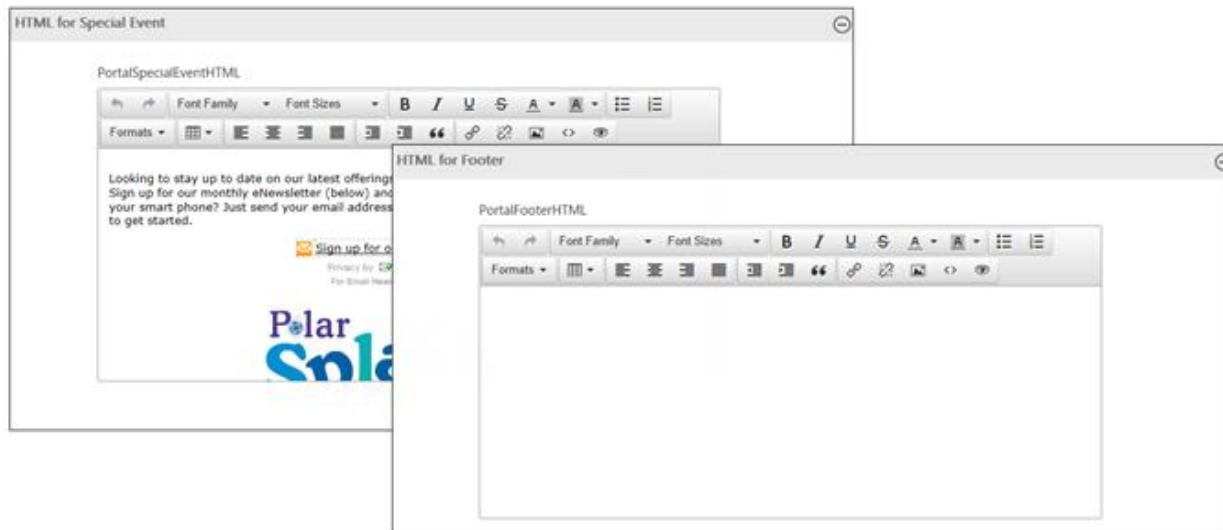
When the Allow Invoicing in Portal check box is selected, citizens completing registration using your organization's citizen portal can request to be invoiced for the registration in place of direct payment.

Selecting the Allow Invoice Payment on Portal check box makes the User Order History page available in the user's profile on the citizen portal, and allows them to pay invoices from the portal.

Use the Google Analytics Tracking Code field to compile usage information for your citizen portal. You must have a Google Analytics™ service account to use this feature.

HTML for Special Event/HTML for Footer

The HTML for Special Event and HTML for Footer boxes provide additional text to display on your home page. These options include various formatting tools to create text with a graphic appeal.



Box Settings

The Box Settings group assigns activities or events that display on the portal sign-in page. Currently, PortalRentalBox fields 1 through 3 and Portal ClassBox fields 1 to 3 are not used. The PortalClassBox4 value defines the left action button on the main portal page and the value of the PortalRentalBox4 defines the right action button.

Box Settings		
PortalClassBox1	PortalRentalBox1	PortalLogInBox1
<input type="text" value="Fitness"/>	<input type="text"/>	<input type="text" value="Fitness"/>
PortalClassBox2	PortalRentalBox2	PortalLogInBox2
<input type="text" value="Leagues"/>	<input type="text"/>	<input type="text" value="Leagues"/>
PortalClassBox3	PortalRentalBox4	PortalLogInBox3
<input type="text" value="Youth Sports"/>	<input type="text" value="browse classes"/>	<input type="text" value="Youth Sports"/>
PortalClassBox4		PortalLogInBox4
<input type="text" value="Register Now"/>		<input type="text" value="Equipment Rental"/>
		PortalLogInBox5
		<input type="text" value="Facility Rental"/>

Registration/Facility/Class/Membership Setting

The Registration, Facility, Class, and Membership setting groups determine if the applicable buttons display in the portal. If you select a Display check box, enter the button label as it should display in the portal. For example, the Setting group provides the Display Registration Button in Portal check box and the **Portal Get Registered** button. If you select the **Display Registration** button in Portal check box, enter the button label as it should display in the portal.

Registration Setting	
<input checked="" type="checkbox"/> Display Registration Button in Portal?	Portal Get Registered Button <input type="button" value="get registered"/>
Facility Setting	
<input checked="" type="checkbox"/> Display Facility Button in Portal?	Portal Facility Browse Button <input type="button" value="browse facilities"/>
Class Setting	
<input checked="" type="checkbox"/> Display Class Button in Portal?	Portal Class Browse Button <input type="button" value="browse classes"/>
Membership Setting	
<input type="checkbox"/> Display Membership Button in Portal?	Portal Join Membership Button <input type="button" value=""/>

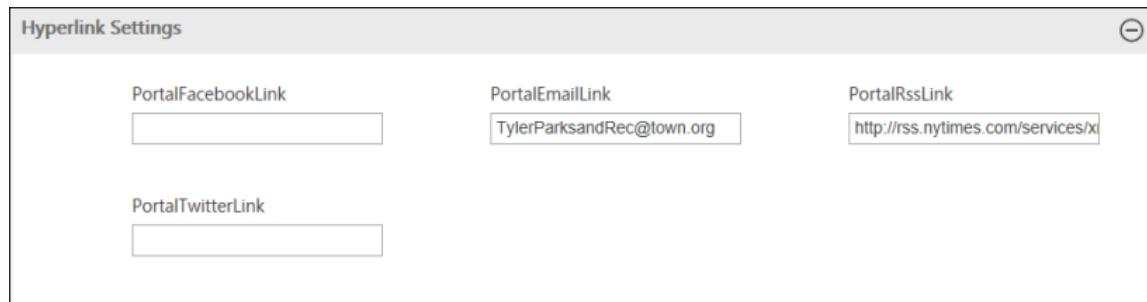
For Facility settings, if you select the Display check box, the citizen portal includes the option for browsing rental facilities. When you select this check box, use the **Portal Facility Browse** button box to define the name for the facility option that displays in the portal.

When the Show on Portal check box is selected for rental facilities and the **Facility** button is enabled, the rental facility is included on the facilities browse list for portal users.

When the Allow Portal Registration check box is selected for a rental item, the **Register** button is enabled when users review available facility dates. In this case, users can complete the registration process directly from the portal.

Hyperlink Settings

The Hyperlink Settings group assigns hyperlinks to the media bar on the main portal page. Currently, the media bar displays all options, even if you do not provide a hyperlink value. In this case, if a user clicks one of the media options, there would be no system response to the action.



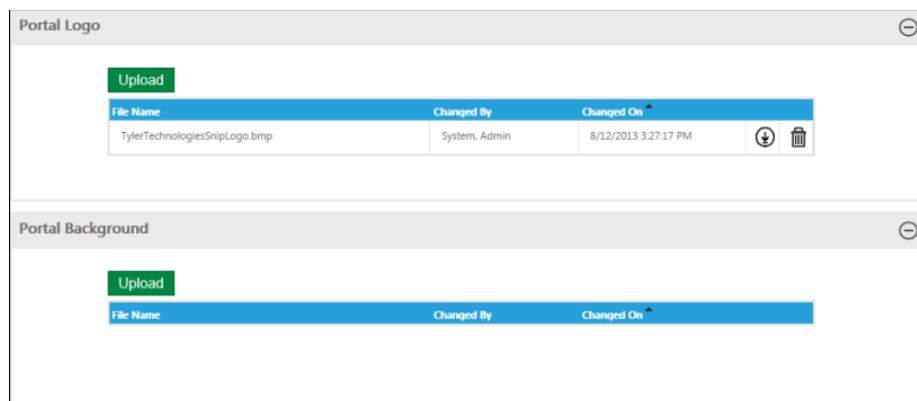
Hyperlink Settings

PortalFacebookLink	PortalEmailLink	PortalRssLink
<input type="text"/>	TylerParksandRec@town.org	http://rss.nytimes.com/services/x
PortalTwitterLink	<input type="text"/>	

Portal Logo/Portal Background

Portal Logo and Portal Background provide the Upload option for customizing images for your Parks and Rec pages. The program accommodates only one file for the logo or background. Before uploading, you must delete any existing files. To view an existing image, click the **Display** button.

The background image fills the entire background of your organization's home page, while the logo displays throughout the portal pages.



Portal Logo

Upload	File Name	Changed By	Changed On
	TylerTechnologiesSnipLogo.bmp	System, Admin	8/12/2013 3:27:17 PM

Portal Background

Upload	File Name	Changed By	Changed On

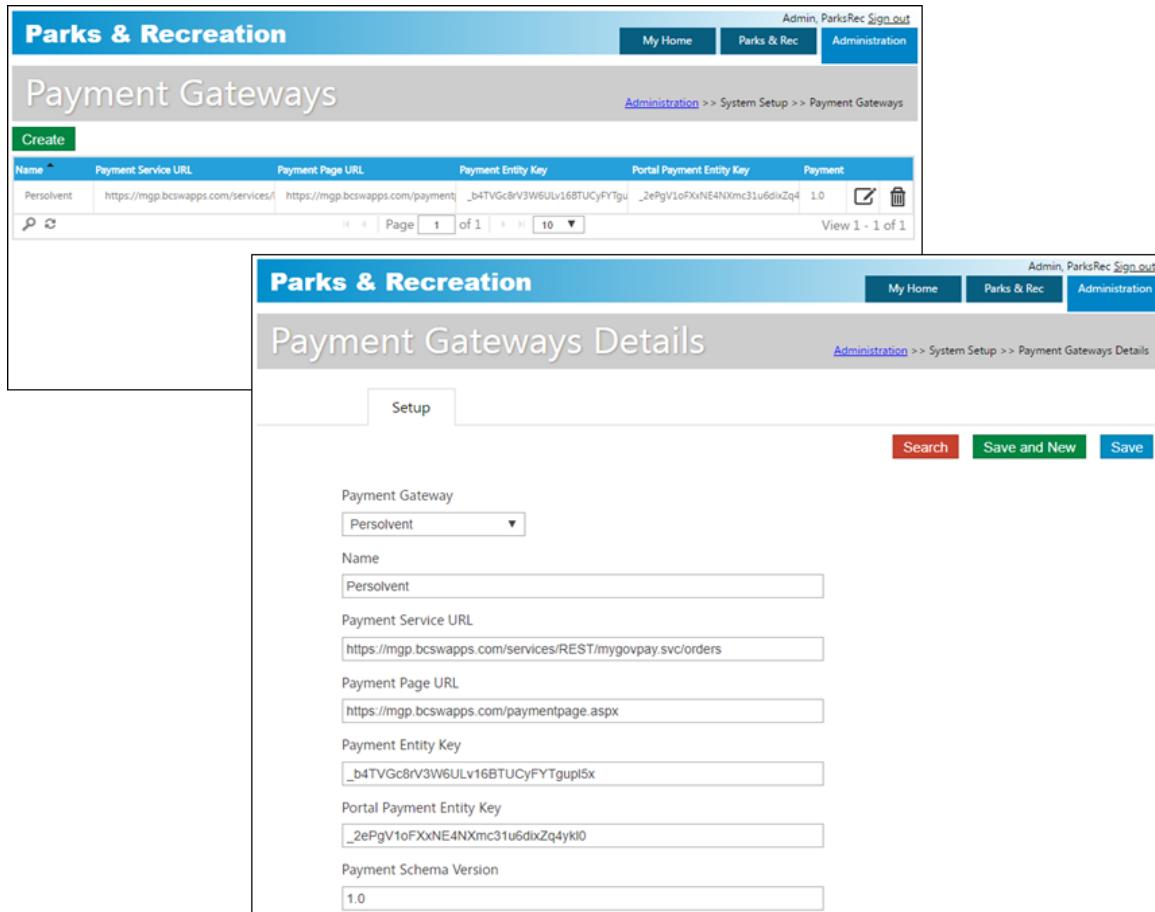
The logo has maximum width and height settings in order to maintain the aspect ratio of the image. If an uploaded image is larger than 230 px by 80 px, it is automatically cropped.

When you hover your pointer over the help button on the Upload page, ToolTips provide upload details.



Payment Gateways

The Payment Gateways category defines the payment gateway and its settings.



During the registration payment process, selecting the **Pay Now** button creates a transaction with an "Unfinished" status, and a contact is added to the class only after a successful payment is made. For the OpenEdge payment gateway only, if a payment is denied by the merchant, the transaction status is updated to "Declined." If a payment is made successfully, the status is updated from "Unfinished" to "Paid in Full," and the contact is added to the class.

Payment Gateways used for credit card payments in the back office or portal will need redirect URLs provided:

BackOffice

- BackOffice Service: *Domain/PaymentsProcessing*
- BackOffice Success: *Domain/PaymentsProcessing/Success*
- BackOffice Cancel: *Domain/PaymentsProcessing/Cancel*

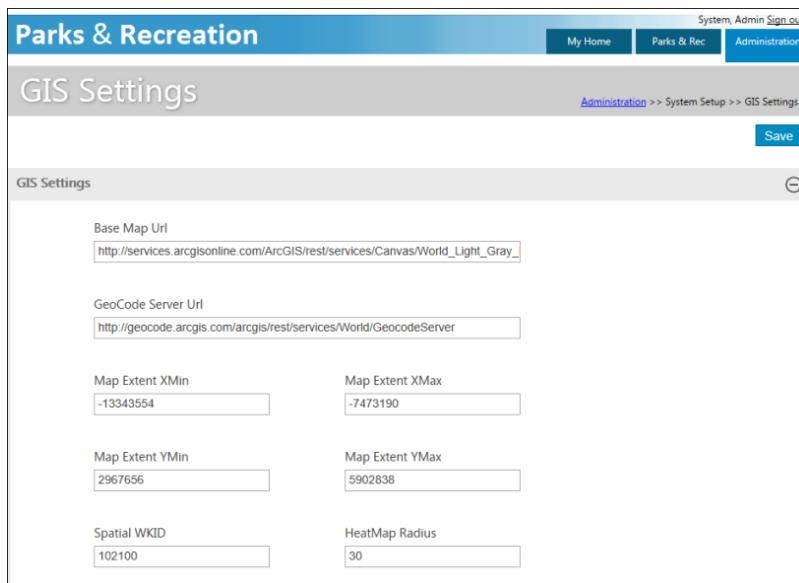
Portal

All portal redirects from payment gateways need to reference the Tenant ID after the domain name. By default, Tenant ID = **Home**

- *Domain/TenantID/PaymentsProcessing*
- *Domain/TenantID/PaymentsProcessing/Success*
- *Domain/TenantID/PaymentsProcessing/Cancel*

GIS Settings

GIS Settings defines the map and heat map details that provide visual location information on your organization's My Home tab.



Integration Settings

Integration Settings determines the file type for general ledger account export files, the invoice export settings files, and reimbursement export settings created from the Transaction Search page on the Parks & Rec tab.

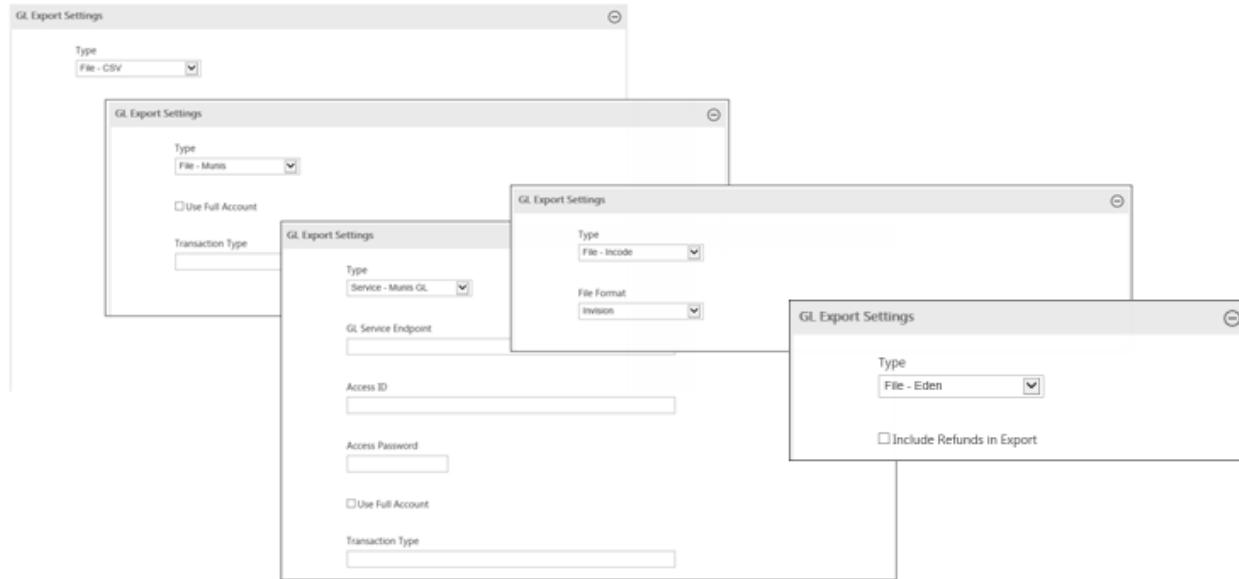
GL Export Settings

For the GL Export Settings, the Type list determines the format for the export file:

- File-CSV—Creates a standard comma-separated values (.csv) export file.
- File-Munis—Creates a general ledger import file compatible with the Munis Import Journals program.
- Service-Munis GL—Uses web services to create a journal entry in the Munis General Journal Entry/Proof program.
- File-TXT—Creates a text export file. This option applies to Redding, CA, organizations.
- File-Incode—Creates a general ledger export file compatible with Tyler Incode requirements.

- File-Eden—Creates a general ledger export file compatible with Tyler Eden requirements.

The available fields vary according to the type of file that you select.



The current date is appended to the end of export file names. This date is also captured as part of the export reference for the transaction.

For each Munis export type, you must ensure that the general ledger accounts in Tyler Parks and Recreation match valid accounts in Munis. The accounts must be in the same format (that is, org/obj/project or full account). The default format is org/obj/project. Select the Use Full Account check box on either setup page to use the full account format for the export files.

If you select File – CSV, you must specify the file prefix that is used in the export file name.

If you select Service–Munis GL, you must specify the service endpoint for the Munis general ledger in the GL Service Endpoint box, and you must provide the Munis web service user name and password.

For each Munis type, the Transaction type box indicates if the transactions are actual (A) or encumbrance (E).

When you select File-Incode from the Type list, general ledger transactions can be exported to a file that can, in turn, be imported into Tyler Incode V.X Financials or Invision file. When you select File–Incode, select the applicable format from the File Format list.

Invoice Export Settings

The Invoice Export Settings group supports the invoicing process for class registrations processed using the Parks & Rec tab. In this group, the Type list determines the type of invoice export to create: File–Munis or File–CSV.

Invoice Export Settings

Type	File - CSV
------	------------

Invoice Export Settings

Type	File - Munis
AR Code	PR
Charge Code	123

Charge Code Settings

Charge Codes Settings enables Tyler Parks and Recreation fees to be associated with Munis charge codes.

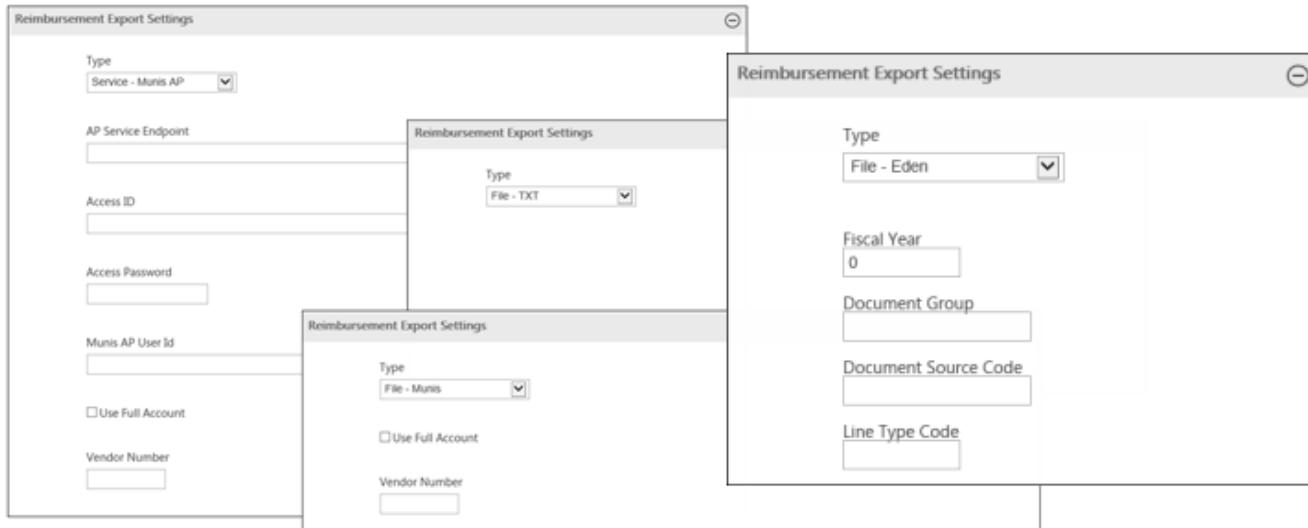
Charge Code Settings

Type	Service - Munis
AR Code	PR
Charge Code Service	<input type="text"/>
Access ID	<input type="text"/>
Access Password	<input type="password"/>

- Fixed–Munis—The AR Code and Charge Code boxes are available. Use the boxes to define the Munis accounts receivable code and charge code for the exported invoices.
- Service–Munis— The AR Code, Charge Code Service, Access ID, and Access Password fields are available. The Charge Code Service field allows you to enter the service endpoint URL, which should be designated as a Munis web service. In this case, the Charge Code field is available on the Fee Details page. This list allows you to assign Munis charge codes to fees.

Reimbursement Export Settings

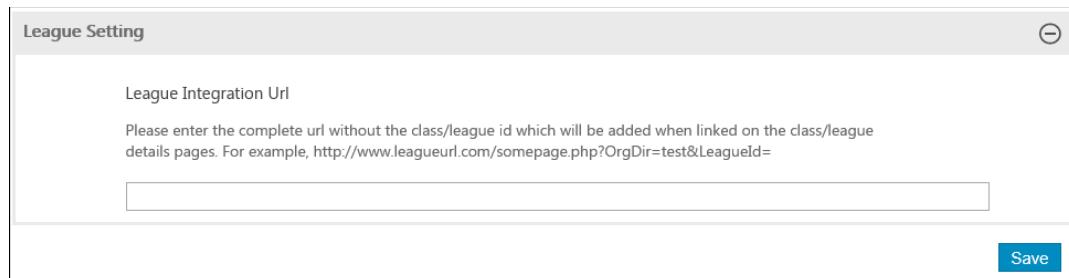
Reimbursement Export Settings defines the reimbursement export files. Settings include File–TXT (Redding, CA specific), Munis flat file for AP Invoice import, Munis Service using AP Invoice web service (V10.4 and higher), and File–Eden, which creates an export file for import to Tyler Eden. The Reimbursements list in Transactions provides the option for exporting instructor payments to accounts payable.



The image shows three separate windows, each titled 'Reimbursement Export Settings'. The first window on the left is for 'Service - Munis AP' and includes fields for AP Service Endpoint, Access ID, Access Password, Munis AP User Id, a checkbox for 'Use Full Account', and a Vendor Number. The middle window is for 'File - TXT' and includes a checkbox for 'Use Full Account'. The third window on the right is for 'File - Eden' and includes fields for Fiscal Year (0), Document Group, Document Source Code, and Line Type Code.

League Settings

Tyler Parks and Recreation integrates with QuickScores to facilitate league management. On the Integration Settings page, the League setting allows you to input the entire league URL.

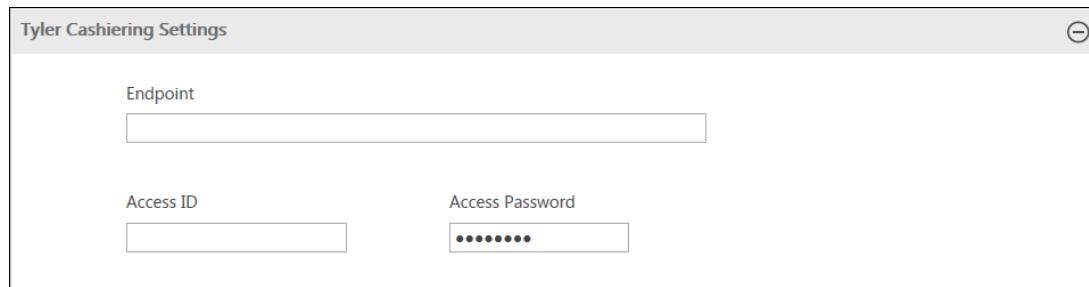


The 'League Setting' window contains a single input field labeled 'League Integration Url' with the placeholder text: 'Please enter the complete url without the class/league id which will be added when linked on the class/league details pages. For example, <http://www.leagueurl.com/somepage.php?OrgDir=test&LeagueId=>'. Below the input field is a 'Save' button.

The URL does not include the class ID, which will be added when you link the class from the Class Details page for a team event. For example, the initial URL setting will be <http://www.quickscores.com/Orgs/PrintSchedule.php?OrgDir=demo&LeagueID=>. When linked on Class Details, the class ID is added, making the URL <http://www.quickscores.com/Orgs/PrintSchedule.php?OrgDir=demo&LeagueID=6733>.

Tyler Cashiering Settings

The Tyler Cashiering Settings provide the endpoint and access values required to integrate Tyler Parks and Recreation with Tyler Cashiering for managing payments and collections.



The 'Tyler Cashiering Settings' window contains three input fields: 'Endpoint' (empty), 'Access ID' (empty), and 'Access Password' (displayed as a series of dots).

Work Order Settings

Tyler Parks and Recreation integrates with Munis Work Orders to allow you to create work orders related to rental items. The Munis Endpoint, Access ID, and Access Password fields store the integration access values for the integration.

Work Order Settings	
Munis Endpoint	
<input type="text"/>	
Access ID	Access Password
<input type="text"/>	<input type="password"/> ······

Collection Export Settings

The Collection Export Settings define the type of export file created by the Collection Export, either a .csv file or an Incode Financials file. The Collection Export creates a file of Tyler Parks and Recreation payment information that may be used in balancing your organization's daily deposit.

Collection Export Settings	
Type	<input type="text"/> File - CSV <input checked="" type="button"/>

System Log

System Log provides details for your organization's Parks and Recreation application. Use the Keyword, Start Date, and End Date boxes to define the search criteria for the log results. You can use the Keyword box to search by event ID or user email address in addition to keywords. When you click the **Search** button, the table refreshes to display the search results.

Parks & Recreation

Admin, ParksRec [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

System Log

[Administration](#) >> [System Setup](#) >> [System Log](#)

Search System Log [Clear](#)

Keyword Start Date End Date 

Export

ID	Date	Level	Message	Tenant	User E-mail	Application
1334858	5/4/2017 2:11:38 PM	Debug	Session Start			Tyler.ParksRecreation.Hosting.Administrative
1334857	5/4/2017 2:11:38 PM	Debug	MVC Action Executed - Elapsed Time: 0.016s	5	admin@documentation.	Tyler.ParksRecreation.Hosting.Administrative
1334856	5/4/2017 2:11:38 PM	Debug	Session Start			Tyler.ParksRecreation.Hosting.Administrative
1334855	5/4/2017 2:11:38 PM	Debug	Session Start			Tyler.ParksRecreation.Hosting.Administrative
1334854	5/4/2017 2:11:37 PM	Debug	MVC Action Executed - Elapsed Time: 0.000s	5	admin@documentation.	Tyler.ParksRecreation.Hosting.Administrative
1334853	5/4/2017 2:11:37 PM	Debug	Session Start			Tyler.ParksRecreation.Hosting.Administrative
1334852	5/4/2017 2:11:34 PM	Debug	MVC Action Executed - Elapsed Time: 0.016s	5	admin@documentation.	Tyler.ParksRecreation.Hosting.Administrative
1334851	5/4/2017 2:11:34 PM	Debug	Session Start			Tyler.ParksRecreation.Hosting.Administrative
1334850	5/4/2017 2:11:34 PM	Debug	Session Start			Tyler.ParksRecreation.Hosting.Administrative
1334849	5/4/2017 2:11:34 PM	Debug	MVC Action Executed - Elapsed Time: 0.000s	5	admin@documentation.	Tyler.ParksRecreation.Hosting.Administrative

[<](#) [>](#)

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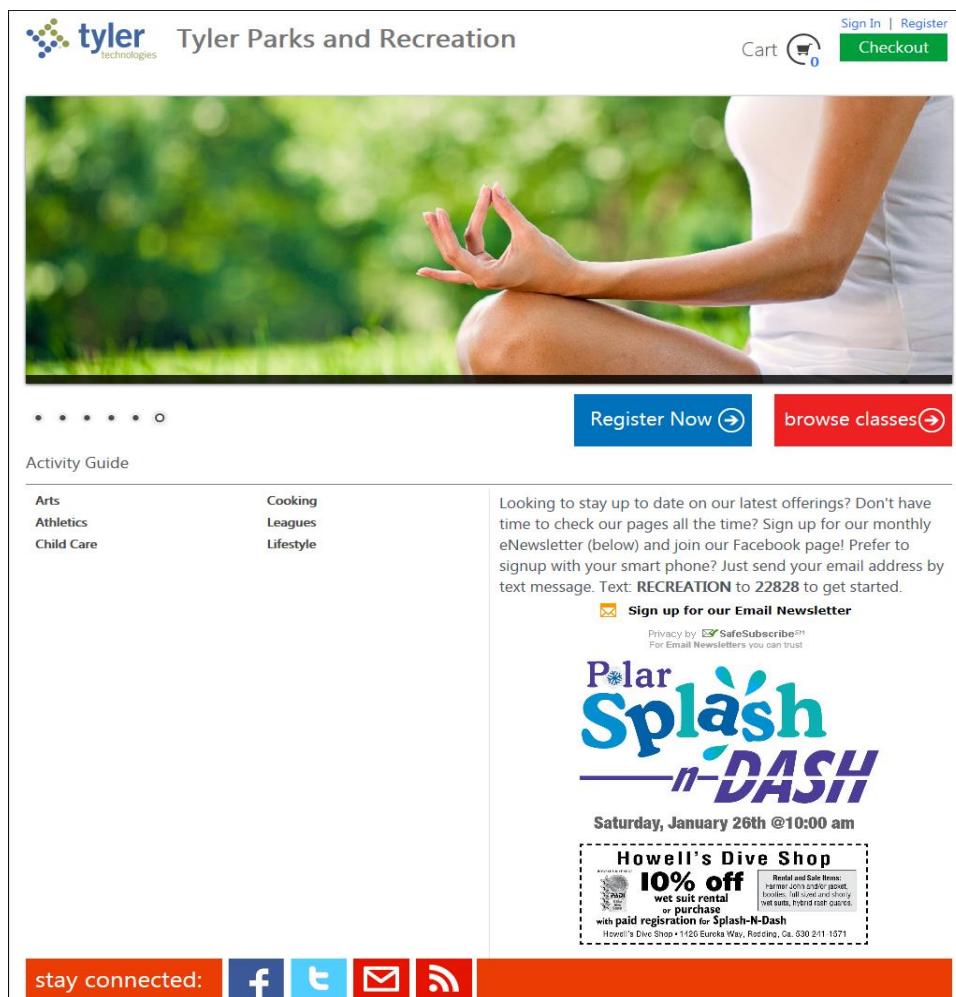
Use the horizontal scroll arrow to view all data for a specific enter. Click **Export** to export the results to Microsoft Excel.

Tyler Parks and Recreation Citizen Portal

Once you have completed the required setup, the citizen portal provides citizen access to the Tyler Parks and Recreation application. The user interface for the application varies according to the settings defined in the System Setup programs.

When you access Tyler Parks and Recreation, the application assesses your browser and displays a message if it detects a browser that does not provide optimal compatibility.

Key components of a citizen-facing page are easy access to the current list of activities, a registration option, as well as a shopping cart with a check out option. Your organization can determine how to present these features and can also customize graphics that display. The following is an example of a citizen portal home page.



On the main portal page, your organization can promote up to six individual activities. The images automatically scroll until a viewer hovers the pointer over the image, which stops the scrolling and allows viewers to read the course description. (See the Class option on the Parks & Rec tab for details on creating the scrolling image option.)

The Activity Guide section of the portal provides links to your organization's defined class categories. Providing this information online creates an environmentally friendly means of offering your activity guide. The available activities are provided according to the Class Category setup option on the Administration tab.

In addition to the Activity Guide section, the portal page footer provides a customizable section where your organization can promote their news and events. These items can include hyperlinks, images, or even a live map with custom features embedded.

The Stay Connected banner provides links to social media and data feeds. Use the Hyperlink Settings section on the Portal Settings pages to define which, if any, of these options to include, along with the appropriate links to each.

The portal page footer provides user-defined information for your organization. For example, you may provide a copyright statement for your application or contact information for your citizen users.

Portal Sign In

The Portal Sign In page accepts a citizen's user name and password. The Sign Up Now option allows new users to create a contact record. The program prompts the user to complete profile, bill address, and email information. When the user saves the record, a contact record is created within the Parks and Recreation application.

Tyler Parks and Recreation

Sign In | Main

Cart  1 [Checkout](#)

PROFILE DETAILS BILLING ADDRESS EMAIL CONFIRM

[< Back](#) [Save](#)

Details

name: Harry Jackson **gender:** Male

date of birth: 10/28/1952 **mobile phone:**

phone: 555-555-5555

Parks & Recreation

System Admin [Sign out](#)

[My Home](#) [Parks & Rec](#) [Administration](#)

Contact Search

Parks & Rec >> Contact >> Contact Search

Search Contacts

Keyword Gender Registrant Instructor Resident Contact Type

[Create](#) [Export](#)

Contact Number	First Name	Last Name	Email Address	Gender	Contact Type	Registrant	Instructor	Resident	Resident	Parent/Guardian	Yes	No	No	<input checked="" type="checkbox"/>	
OB-2013-000004	Harriett	Jackson		Female	Parent/Guardian	No	No	No	<input checked="" type="checkbox"/>						
RES-08-2013-000009	Harry	Jackson	harry@yahoo.com	Male		Yes	No	No	<input checked="" type="checkbox"/>						
RES-08-2013-000005	Jenny	Smith		Female	Instructor	No	Yes	No	<input checked="" type="checkbox"/>						
RES-08-2013-000007	Kate	Jones		Female	Instructor	No	Yes	No	<input checked="" type="checkbox"/>						

Billing address

resident: No

address line 1: 123 Tyler Drive

address line 2:

city: Yarmouth

state: ME

zip: 04096

Email

email address: harryj@yahoo.com
Yarmouth, Maine, United States

[< Back](#) [Save](#)

If your organization has configured the portal to allow invoice payments, the user's Profile page provides access to the Orders page. This page lists unpaid invoices and has a payment feature.

Portal Registration

Once users have an active account, they can browse the available activity offerings. When they click **Details** for an activity, the Cart page displays, where they can complete their registration, specify a team, if applicable, and purchase any available add-ons.

Tyler Parks and Recreation

Keyword: Class Type: Start Date: End Date:

Location: Gender: Age: 

melfring@tylertech.com | Main | Sign Out

Cart 0 Checkout

Tyler Parks and Recreation

Class 

Adult Soccer
Location: Hayward Field
A-Soccer

Basic Sketching
Location: Bartlett School
AT-101

Hiking
Location: Hayward Field
HK-101

Soccer Level 1
Location: Hayward Field
08-2013-000001

Cart

Adult Soccer
Location: Hayward Field
Type: Athletic - Indoor
Class number: A-Soccer 

Age range: 18 - 100
Registrant: Kathleen Mullen 

Class: **\$50.00**
Add-On: **\$15.00**
\$65.00

Continue Shopping Empty Cart Next >

Tyler Parks and Recreation

Final Step - Make a Payment

Payment

< Back Next >

Order Summary Invoice To: Mullen, Kathleen Due Date: 8/15/2013

Kathleen Mullen : A-Soccer - Adult Soccer - Athletic - Indoor - Hayward Field

Item	Quantity	Amount
Adult Soccer	1	\$50.00
Adult Soccer Jersey	1	\$15.00
Total:		\$65.00

< Back Next >

Available discounts are displayed on the respective class, rental and membership search lists and detail pages. If multiple discounts are eligible, the one with the greatest dollar amount is applied.