



## Tyler Parks and Recreation

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*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 Recreation 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.

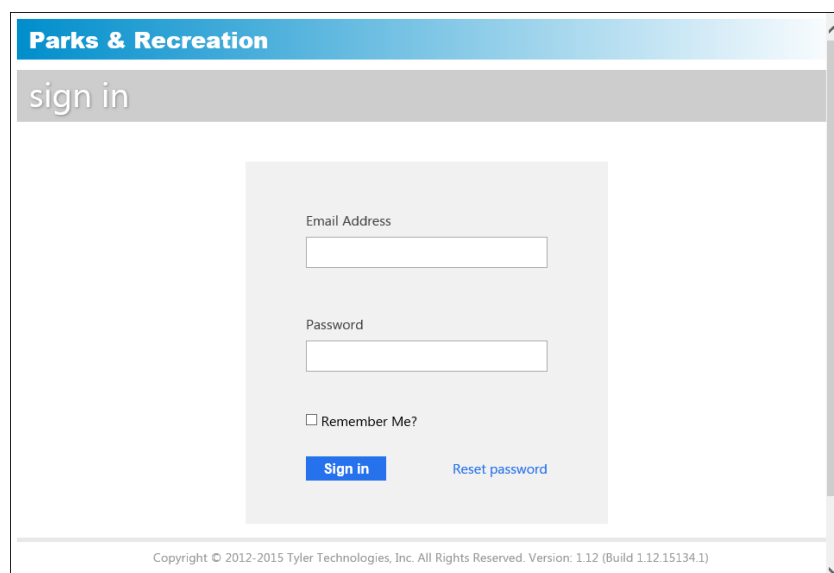
When you access the Administration pages for Tyler Parks and Recreation, the My Home, Parks & Rec, and Administration tabs are available. The Parks & Rec tab provides the contact, class, expense, rental, and report pages that your Parks and Recreation personnel use to manage programs and activities.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

# Overview

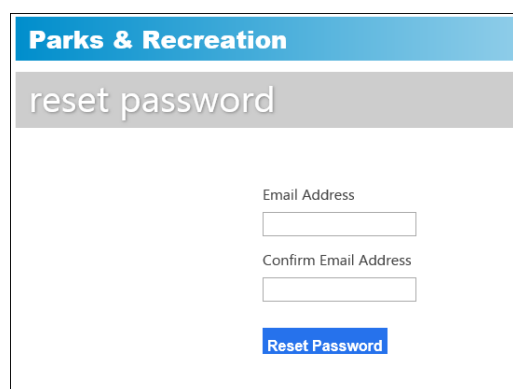
The Tyler Parks and Recreation application includes many common options and procedures. These common items provide efficiencies for you, as once you are familiar with an option or process, it is the same throughout the remainder of the application. This section of the user guide describes these common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

## Sign In

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



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



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
Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

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

Search Rental Registrations

Keyword

Rental S
- Select

Start Date

End Date

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
Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

Team Search
Parks & Rec >> Team >> Team Search

Search Teams

Keyword

Team Type
- Select -

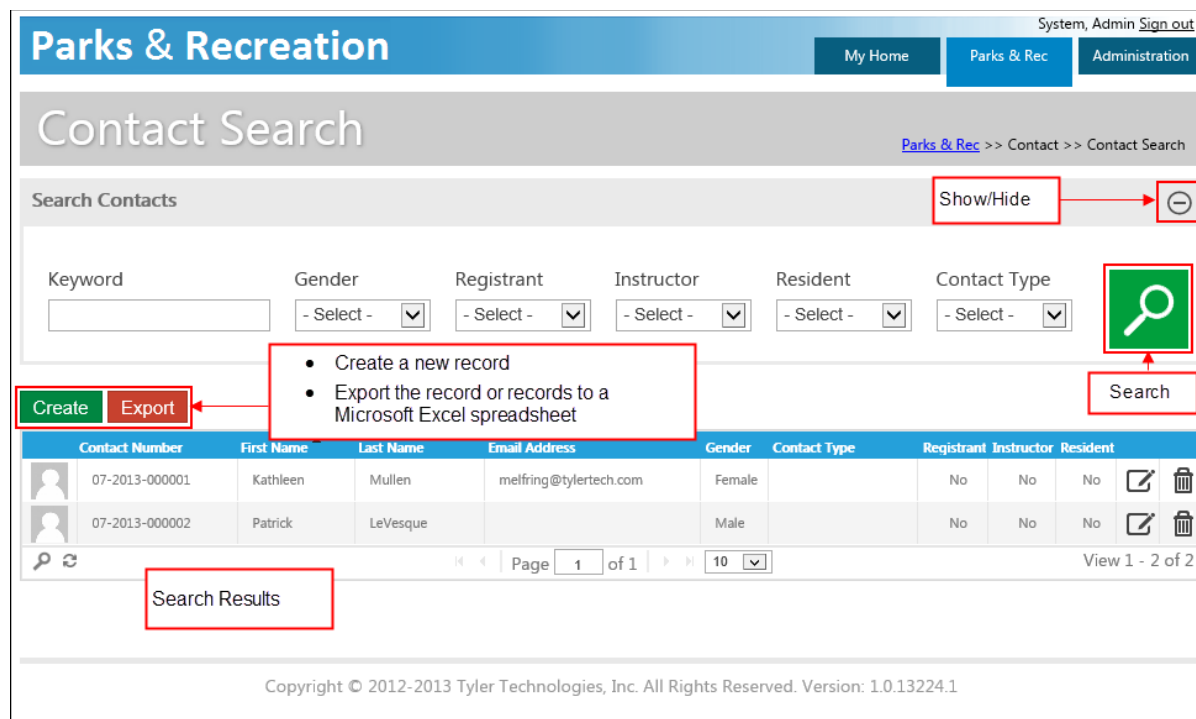
Class Name
- Select -

Create
Export

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	88-08-2015-000012	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** System, Admin [Sign out](#)

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

## Contact Search





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

Search Contacts Show/Hide

Keyword:  Gender:  Registrant:  Instructor:  Resident:  Contact Type:

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

- 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





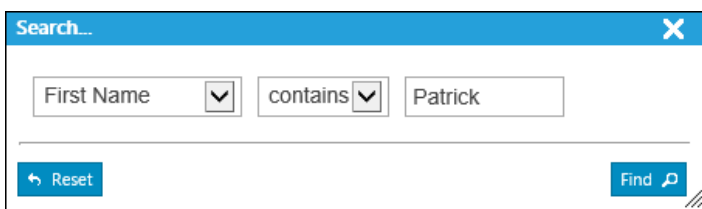


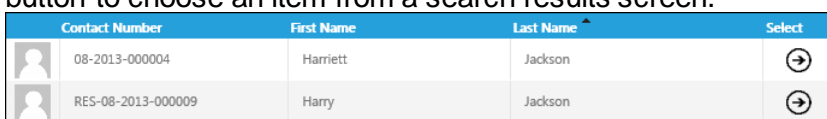


Search Results

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## Button Options

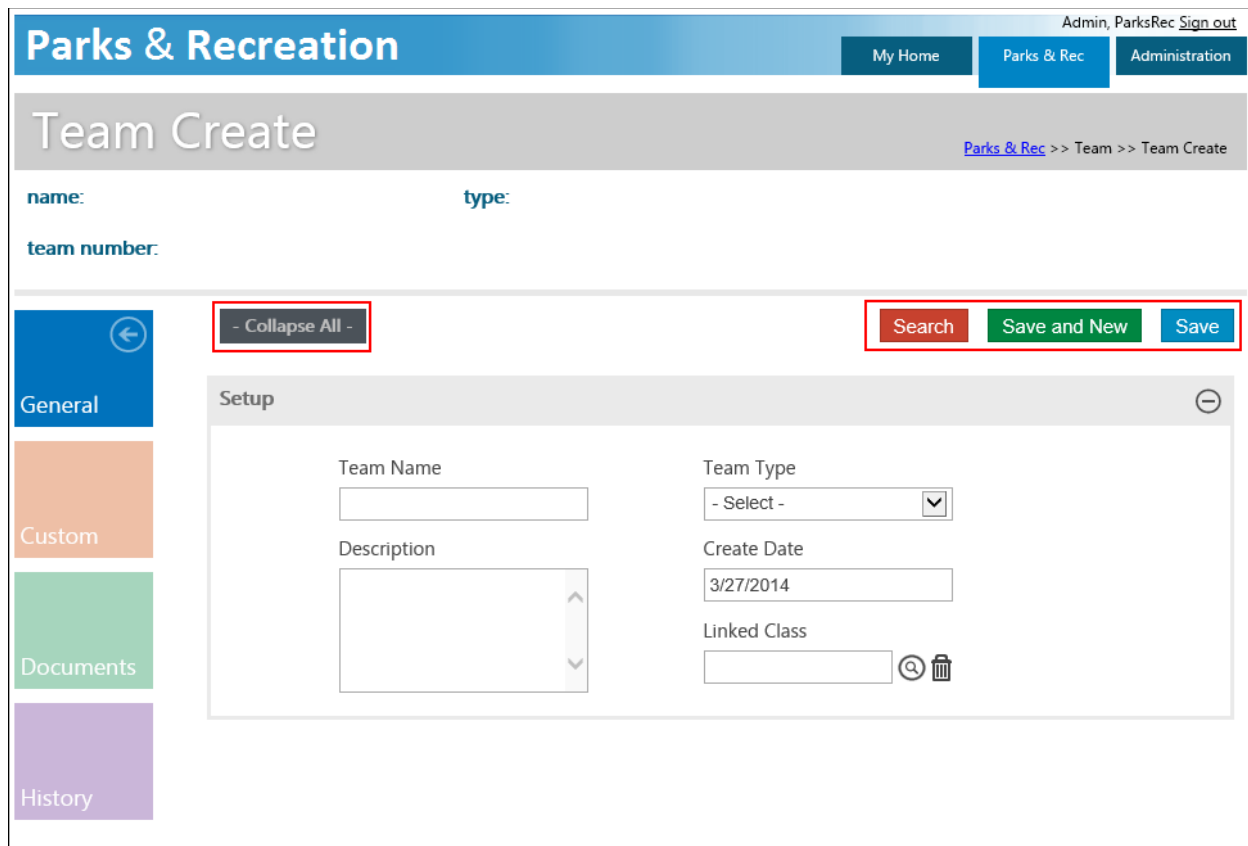
Search results and detail pages provide multiple options for completing a process or maintaining data. Often the options are indicated by on-screen buttons. The following table provides a brief description for each option.

Button	Description
 Custom Fields	Allows you to edit values for custom fields assigned to the selected category.
 Delete	Deletes the selected item.
 Display	Provides a preview of an image or file. For example, on the Portal Settings page, click the <b>Display</b> button to view an existing logo file.
 Show/Hide	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 <b>Edit</b> button for the Class search results, the program displays

Button	Description
Edit	the Class Details page. On the Class Details page, when you click the <b>Edit</b> 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	Searches the selected category or group using defined statements. 
 Search	Provides a list of available options for a field.
 Select	Selects the specified item and displays the details. For example, click the <b>Select</b> button to choose an item from a search results screen. 
 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.



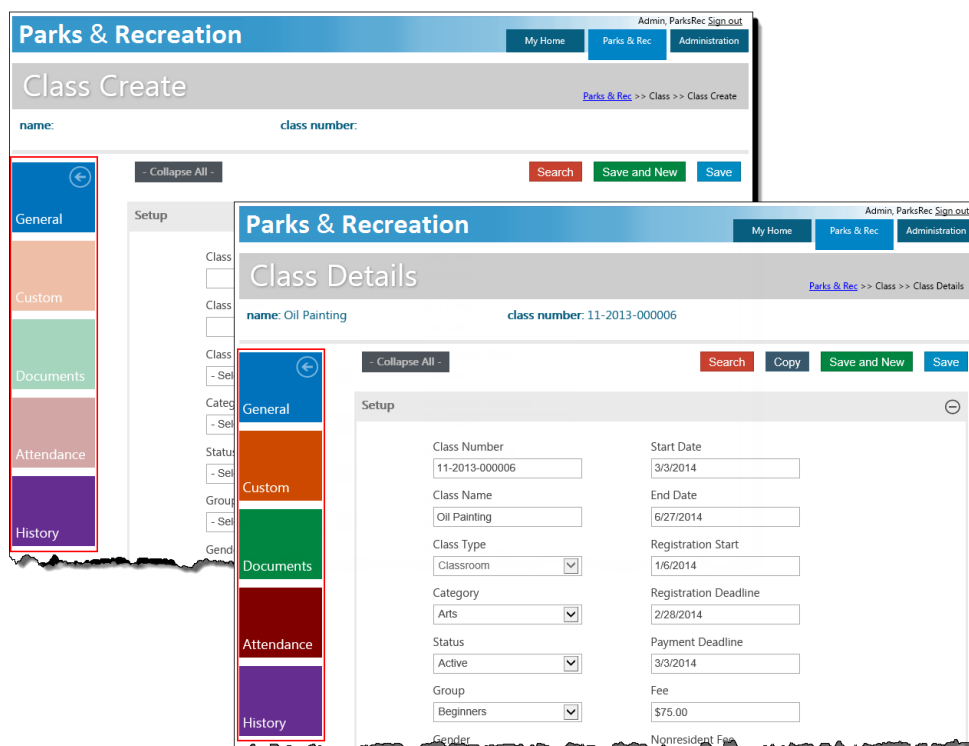
## Program Options

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:

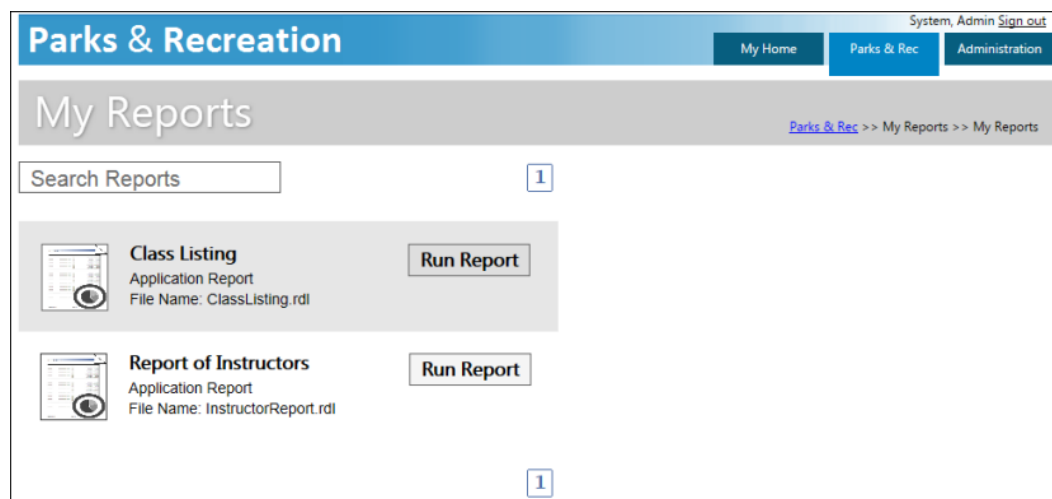
- **General**—Provides the core details for the selected record. This is the active option when you display a page.
- **Custom**—Provides access to custom field data. Custom fields are created using the Custom Fields option and assigned using the Custom Fields Layout options.
- **Documents**—Provides 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.



## 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

[Run Report](#)



**Report of Instructors**  
Application Report  
File Name: InstructorReport.rdl

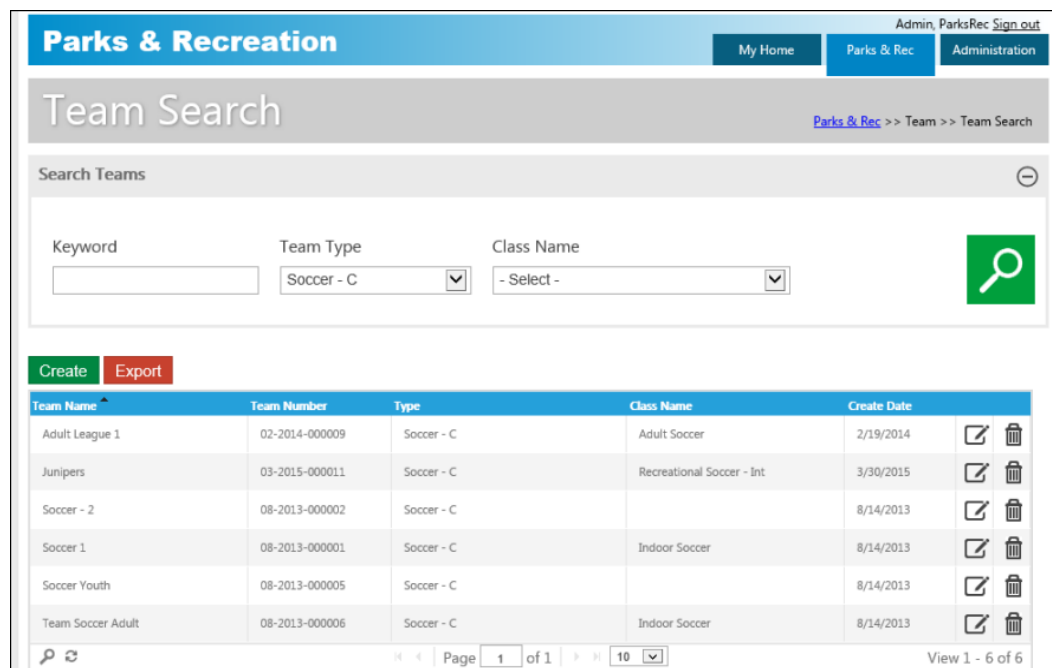
[Run Report](#)

1

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

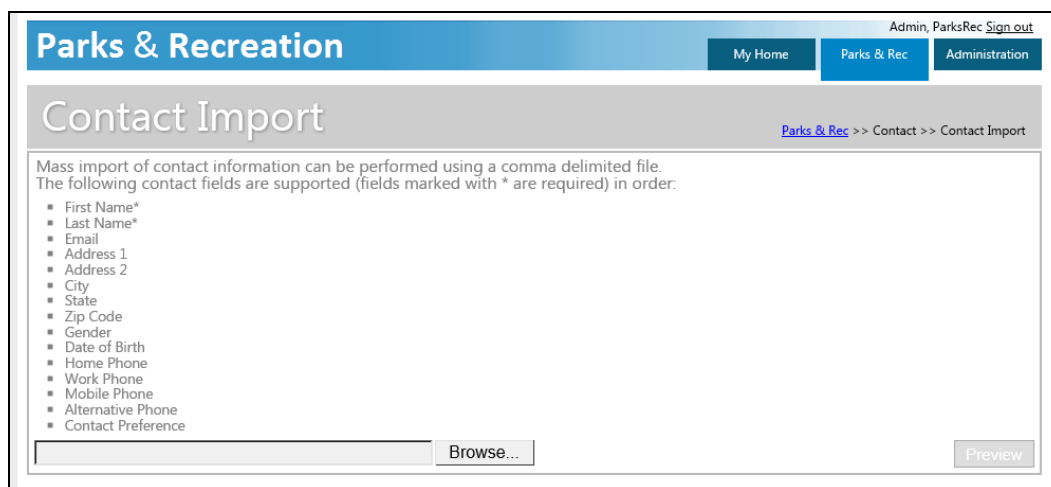
[Create](#) [Export](#)

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		

[⌂](#) [↺](#) [↻](#) Page  of   [⌵](#) 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

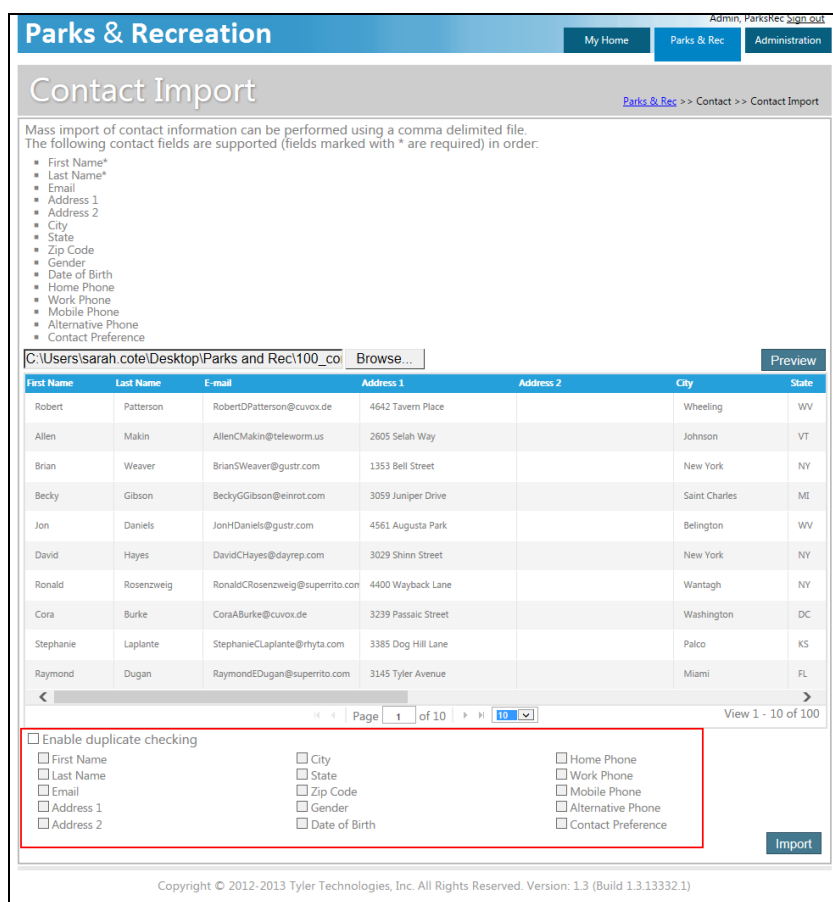
[Parks & Rec](#) >> [Contact](#) >> [Contact Import](#)

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

Browse... Preview

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

C:\Users\sarah.cote\Desktop\Parks and Rec\100\_co Browse... Preview

First Name	Last Name	E-mail	Address 1	Address 2	City	State
Robert	Patterson	RobertDPatterson@cuvovx.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	BeckyGibson@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@cuvovx.de	3239 Passaic Street		Washington	DC
Stephanie	Laplante	StephanieCLaplante@rhyta.com	3385 Dog Hill Lane		Palco	KS
Raymond	Dugan	RaymondEDugan@superrito.com	3145 Tyler Avenue		Miami	FL

Page 1 of 10 View 1 - 10 of 100

☐ Enable duplicate checking

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

Import

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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.

Ronald	Rosenzweig	RonaldCRosenzweig@superrito.com	4400 Wayback Lane	Wantagh	NY
Cora	Burke	CoraABurke@cuvovx.de	3239 Passaic Street	Washington	DC
Stephanie	Laplante	StephanieCLaplante@rhyta.com	3385 Dog Hill Lane	Palco	KS
Raymond	Dugan	RaymondEDugan@superrito.com	3145 Tyler Avenue	Miami	FL

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View 1 - 10 of 101

**Import Summary**

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

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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

My Home

Parks & Rec

Administration

Dashboard

Home

Recent Registrations

Recent Rentals

Registration

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

Calendar


[Master Calendar](#)

Tasks

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

Reports

[View Reports](#)



Classes starting in the next 7 days:

Class Name	Start Date	Registered
No records.		

Classes ending in the next 7 days:

Class Name	End Date
Coaching Clinic	06/11/2018

**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.)

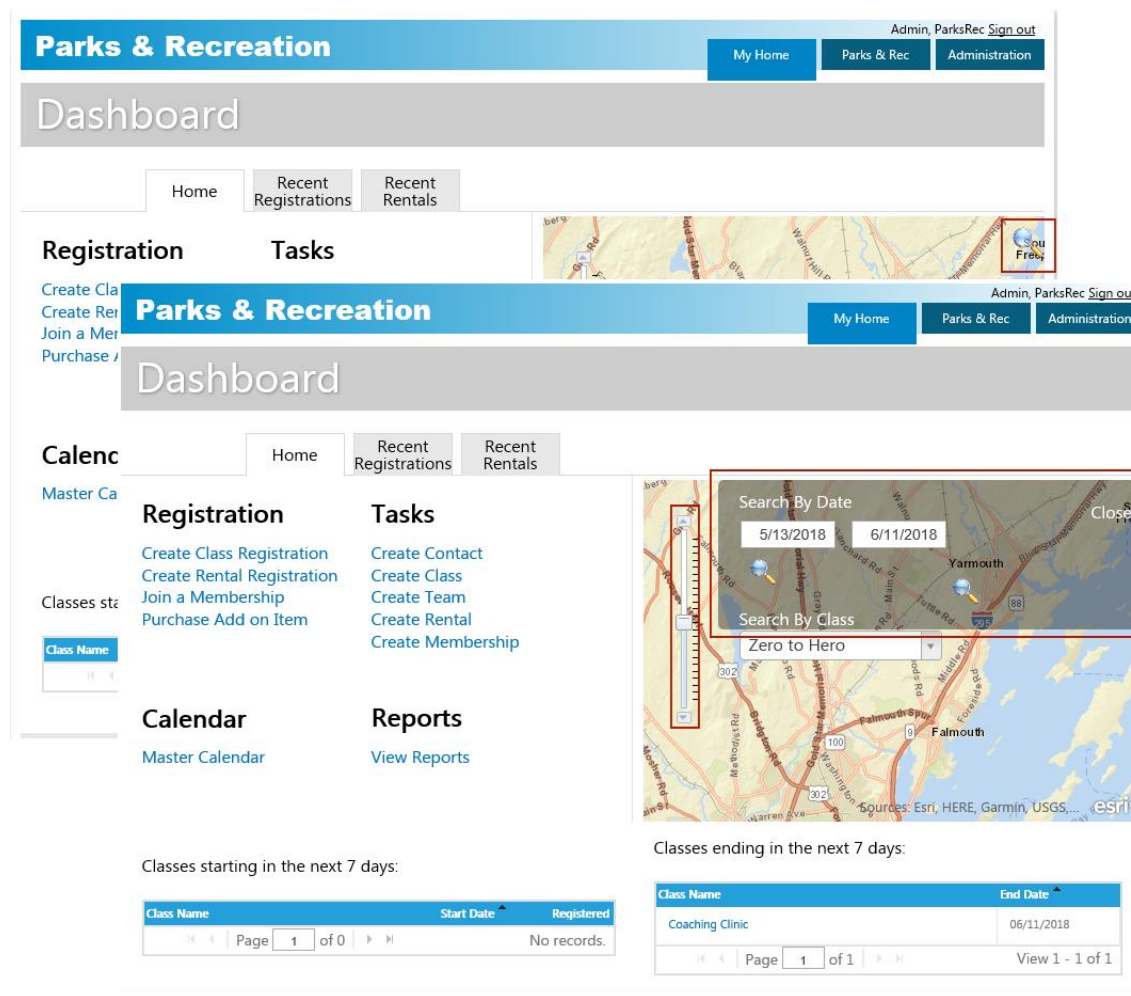
## Home Tab

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 search overlay on the activity map. The overlay includes the following elements:

- Search By Date:** Two date input fields showing 5/13/2018 and 6/11/2018, with a Close button.
- Search By Class:** A dropdown menu showing "Zero to Hero".
- Map:** A map of the Yarmouth area with a zoom slider on the left.

Below the map, there are two tables showing class information:

Classes starting in the next 7 days:

Class Name	Start Date	Registered
No records.		

Classes ending in the next 7 days:

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
Recreat			03/26/2014 12:28:19 PM
Skating			02/19/2014 02:32:28 PM
Skating			02/19/2014 02:22:00 PM
Oil Painting	Marcy Madison	Paid in Full	01/06/2014 11:45:30 AM

Search...
Class Name
contains
Reset
Find

Page 1 of 3
10
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

My Home
Parks & Rec
Administration


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



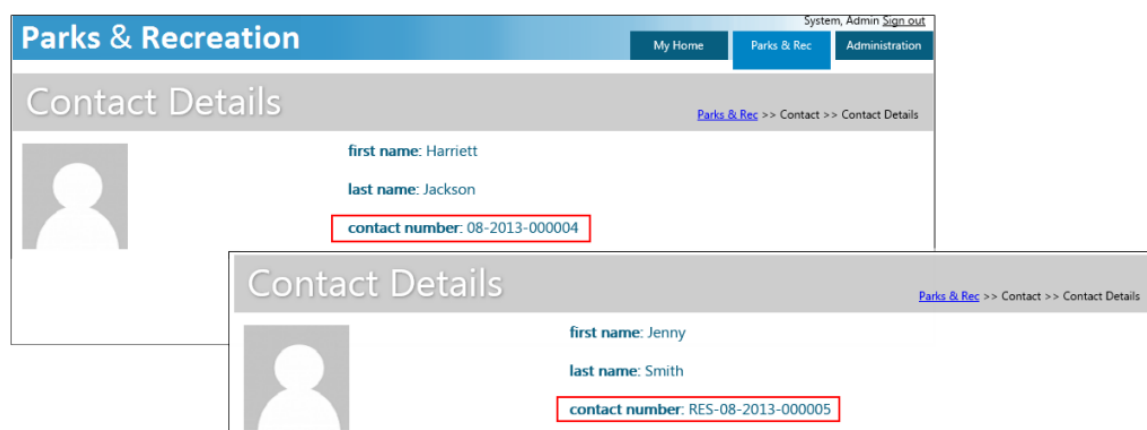
The following table provides a brief description for each category on the Parks & Rec tab. The available options depend on the settings defined on the Administration tab.

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

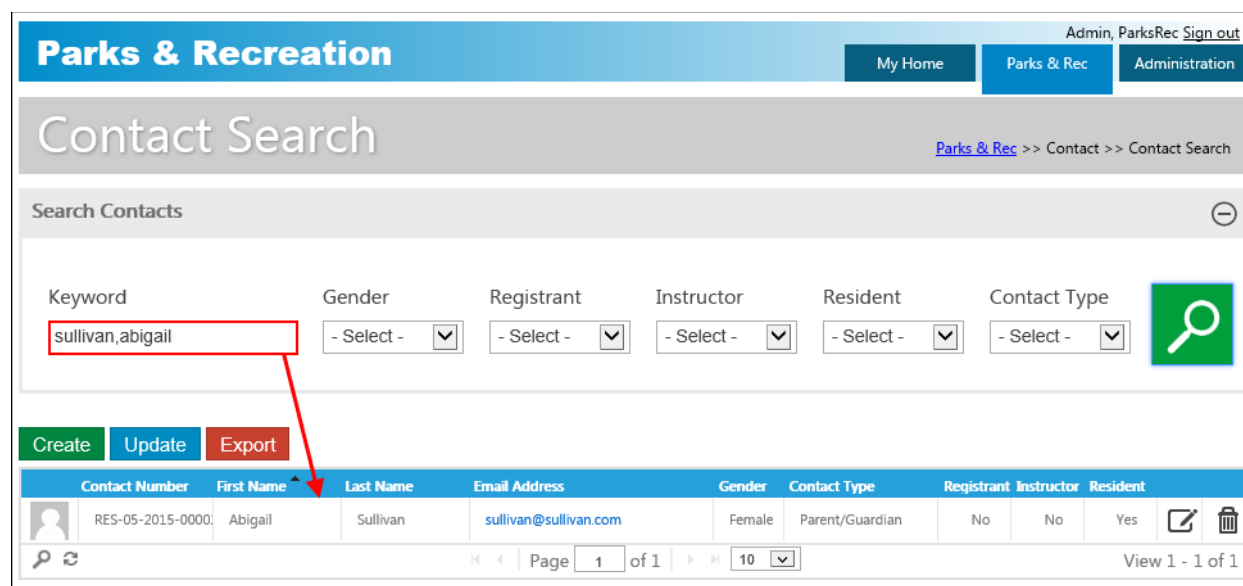
Contacts are the individuals associated with the Parks & Recreation activities, including participants, instructors, and item or facility renters. When citizens register for activities using the portal, contact records are created. Within your organization, personnel can create contact records for instructors,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



## Contact Search

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



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

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 12<sup>th</sup> 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** 

### Contact Details

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

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








**Credit Balance: \$0.00**

#### Account Credit Refund

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

[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		
		  Page <input type="text" value="1"/> of 1  	<input type="text" value="10"/> 	View 1 - 2 of 2	
					

### 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* <div> Unspecified </div>	Home Phone <div> 254-824-7442 </div>
First Name* <div> Aaron </div>	Work Phone <div> </div>
Middle Name <div> </div>	Mobile Phone <div> </div>
Last Name* <div> Kurtz </div>	Alternative Phone <div> </div>
Gender <div> Male </div>	Alternative Mobile Phone 1 <div> </div>
Contact Type <div> - Select - </div>	Alternative Mobile Phone 2 <div> </div>
Date of Birth (mm/dd/yyyy)* <div> 10/21/1982 </div>	Email Address <div> emailaddress@email.com </div>
Age: 35  <input type="checkbox"/> Resident	<input type="checkbox"/> Employee
<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

Email

Home Phone

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 ...

Quick Search and Add

123 T

123 Tyler Drive, Yarmouth, ME 04096

Address Line 1

City

Address Line 2

Address Line 3

Postal Code

Address

Quick Search and Add

123 Tyler Drive, Yarmouth, ME 04096

Address Line 1

123 Tyler Drive

City

Yarmouth

Address Line 2

State

ME

Address Line 3

County

Postal Code

04096

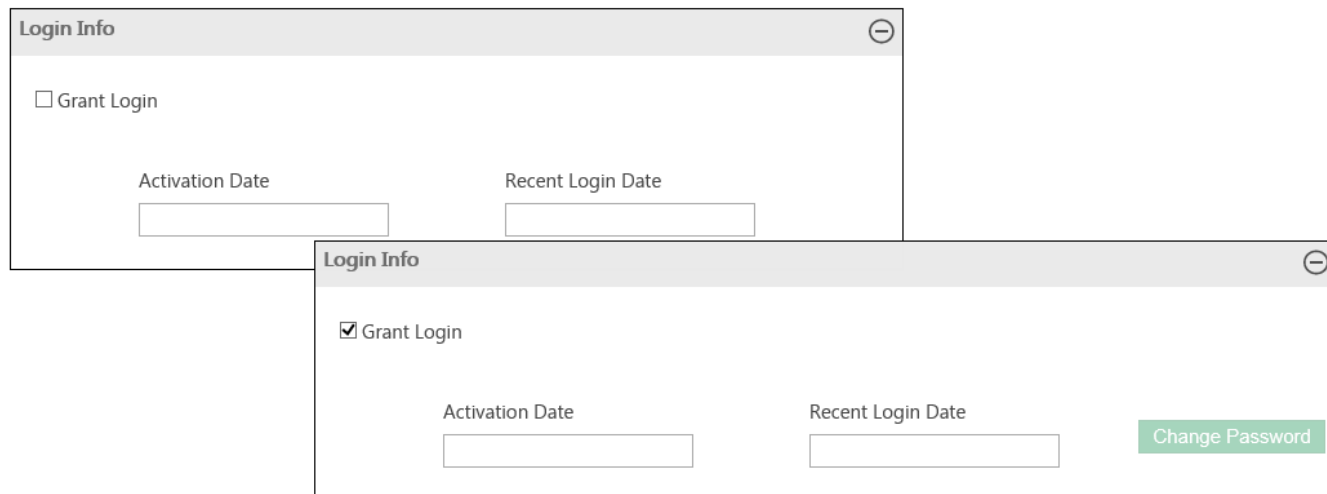
Country Type

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.



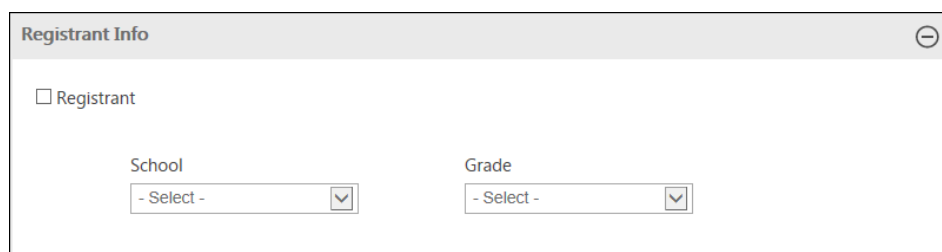
The image shows two overlapping screenshots of the 'Login Info' form. The top screenshot shows the form with the 'Grant Login' checkbox unchecked. Below it, there are two text input fields labeled 'Activation Date' and 'Recent Login Date'. The bottom screenshot shows the same form but with the 'Grant Login' checkbox checked. In this state, a green 'Change Password' button appears to the right of the 'Recent Login Date' field.

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.



The image shows a screenshot of the 'Registrant Info' form. It features a 'Registrant' checkbox at the top. Below it, there are two dropdown menus: one for 'School' and one for 'Grade'. Both dropdown menus currently display '- Select -'.

## 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

Music Theory

Start Date

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

23

Remit Number

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

- Select -

Account Number

Account Type

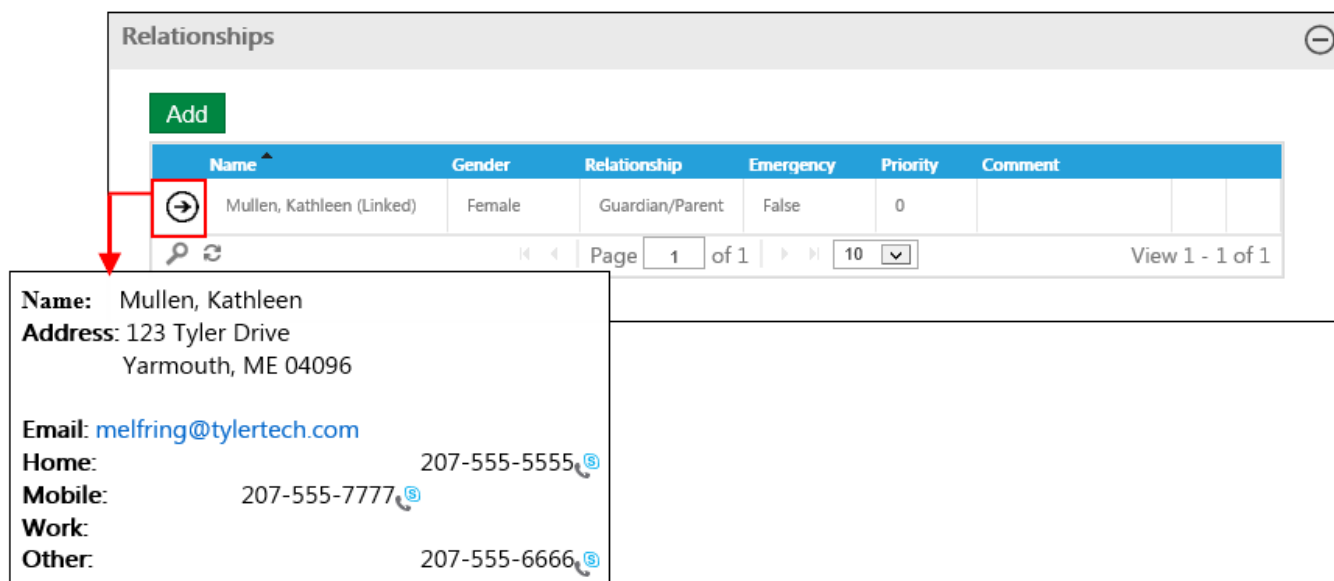
- Select -

☒ Pre-approved



## Relationships

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



**Relationships**

**Add**

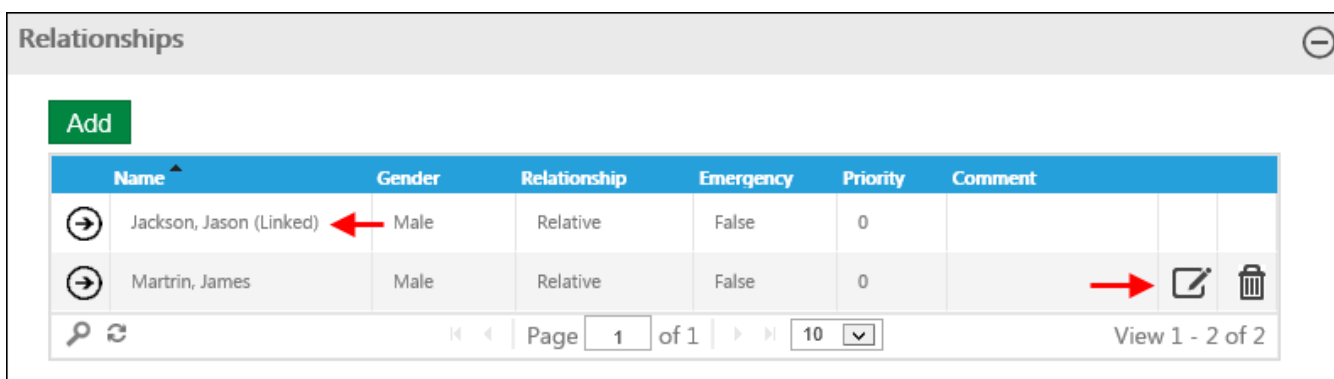
Name	Gender	Relationship	Emergency	Priority	Comment
Mullen, Kathleen (Linked)	Female	Guardian/Parent	False	0	

Page 1 of 1 | 10 | View 1 - 1 of 1

**Name:** Mullen, Kathleen  
**Address:** 123 Tyler Drive  
 Yarmouth, ME 04096  
**Email:** [melfring@tylertech.com](mailto: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.



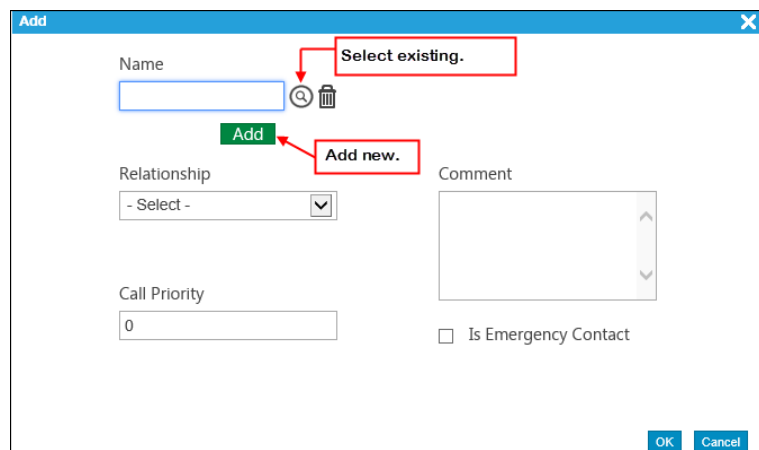
**Relationships**

**Add**

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

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

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.

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



Page 1 of 1
10

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

Order History

Invoice Number	Amount	Description	Payment Method	Status	Receipt Number
01-2014-000011	\$12.00	Skate Shop Add-On Fee for Ice Arena		Invoiced	
01-2014-000011	\$400.00	Rental Fee for Ice Arena		Invoiced	
12-2014-000044	\$25.00	Class Payment for Adult Soccer	Cash	Paid In Full	RECEIPT-12-2014-000029

Page 1 of 1
10

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.

Restriction

Add

Name	Comment
No registration	Do not allow registrations; participant has several outstanding balances for previous activities.

Page 1 of 0
10

Restrictions

Restriction

No registration

Comment

Do not allow registrations; participant has several outstanding balances for previous activities.

Restriction

Add

Name	Comment
No registration	Do not allow registrations; participant has several outstanding balances for previous activities.

Page 1 of 0
10

View 1 - 1 of 1

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.

Cancel

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.

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](#)

My Home
Parks & Rec
Administration

## Class Search

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

**Search Classes** ⊖

Keyword

Location  
- Select - ▼

Class Type  
- Select - ▼

Category  
- Select - ▼

Status  
Active ▼

Gender  
- Select - ▼

Age

Instructor  
- Select - ▼

Start Date From

Start Date To

End Date From

End Date To

☐ Members Only  
☐ Residents Only

Create
Export

Class Number	Class Name	Start Date	End Date	Class Location	Class Type	Class Status	Register	Max #	
05-2017-000042	<b>Number:</b> 05-2017-000042 <b>Name:</b> Intermediate Yoga <b>Dates:</b> 6/23/2017 - 8/11/2017 <b>Registration Dates:</b> 5/4/2017 - 6/16/2017 <b>Instructor:</b> Jones, Kate <b>Friday: 7:00 PM - 8:00 PM</b>	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

General

Custom

Documents

Attendance

History

- Collapse All -
Search

Setup ⊖

\* Indicates required fields

<div style="margin-bottom: 10px;"> <b>Class Name*</b>  <input type="text" value="Summer Camp Week 4"/> </div> <div style="margin-bottom: 10px;"> <b>Class Type*</b>  <input type="text" value="Camp"/> </div> <div style="margin-bottom: 10px;"> <b>Category*</b>  <input type="text" value="Camps"/> </div> <div style="margin-bottom: 10px;"> <b>Status*</b>  <input type="text" value="Open"/> </div> <div style="margin-bottom: 10px;"> <b>Group</b>  <input type="text" value="- Select -"/> </div> <div style="margin-bottom: 10px;"> <b>Gender*</b>  <input type="text" value="Coed"/> </div> <div style="margin-bottom: 10px;"> <b>Location*</b>  <input type="text" value="Johnson Park"/> </div>	<div style="margin-bottom: 10px;"> <b>Start Date*</b>  <input type="text" value="2/12/2016"/> </div> <div style="margin-bottom: 10px;"> <b>End Date*</b>  <input type="text" value="10/31/2055"/> </div> <div style="margin-bottom: 10px;"> <b>Fee Template</b>  <input type="text" value="- Select -"/> </div> <div style="margin-bottom: 10px;"> <b>Fee Name</b>  <input type="text" value="Summer Camp Fee"/> </div> <div style="margin-bottom: 10px;"> <b>Registration Start*</b>  <input type="text" value="2/12/2016 12:00 AM"/> </div> <div style="margin-bottom: 10px;"> <b>Registration Deadline*</b>  <input type="text" value="10/31/2020 12:00 AM"/> </div> <div style="margin-bottom: 10px;"> <b>Payment Deadline</b>  <input type="text"/> </div>
--	---

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

<div style="margin-bottom: 10px;"> <b>Class Name*</b> <span style="border: 1px solid red; padding: 0 2px;">*</span>  <input type="text" value="Summer Camp Week 4"/> </div> <div style="margin-bottom: 10px;"> <b>Class Type*</b>  <input type="text" value="Camp"/> </div> <div style="margin-bottom: 10px;"> <b>Category*</b>  <input type="text" value="Camps"/> </div> <div style="margin-bottom: 10px;"> <b>Status*</b>  <input type="text"/> </div>	<div style="margin-bottom: 10px;"> <b>Start Date*</b> <span style="border: 1px solid red; padding: 0 2px;">*</span>  <input type="text" value="2/12/2016"/> </div> <div style="margin-bottom: 10px;"> <b>End Date*</b>  <input type="text" value="10/31/2055"/> </div> <div style="margin-bottom: 10px;"> <b>Fee Template</b>  <input type="text" value="- Select -"/> </div> <div style="margin-bottom: 10px;"> <b>Fee Name</b>  <input type="text"/> </div>
---	---

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

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 <a href="#">Display Class Images on the Citizen Portal</a> 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	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. 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 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. 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.

## 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) ▲

☐ [Select all]
☐ Annual Membership
☐ 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									
						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 Paymer		06/24/2016 11:41:46 AM		+			
						Page 1 of 1 10 View 1 - 2 of 2			

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

Patrick

Last Name

Smith

Group

Fee

50.00

Registrant Total

17.00

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

☒ Full ☐ Split

Pay By

Smith, Patrick | Me

Payment Method

Cash

Pay

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		

Page 1 of 1

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

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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
No records to view					

Page 1 of 0

10

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.

Wait List

First Name	Last Name	Create Date	Notes
<div> <div> <div></div> <div></div> </div> <div> <div></div> <div></div> </div> </div> <div> <div>Page</div> <div>1</div> <div>of 0</div> </div> <div> <div>10</div> <div></div> </div> <div>No records to view</div>			

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.

Drop In Payments

Add

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

Page

1

of 1

10

View 1 - 2 of 2

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\*

- Select Fee -

Payer Name

Payment Method\*

- Select Pay Method -

Paid Date\*

Amount\*

Comment

\*Required

OK

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

Void

Refund

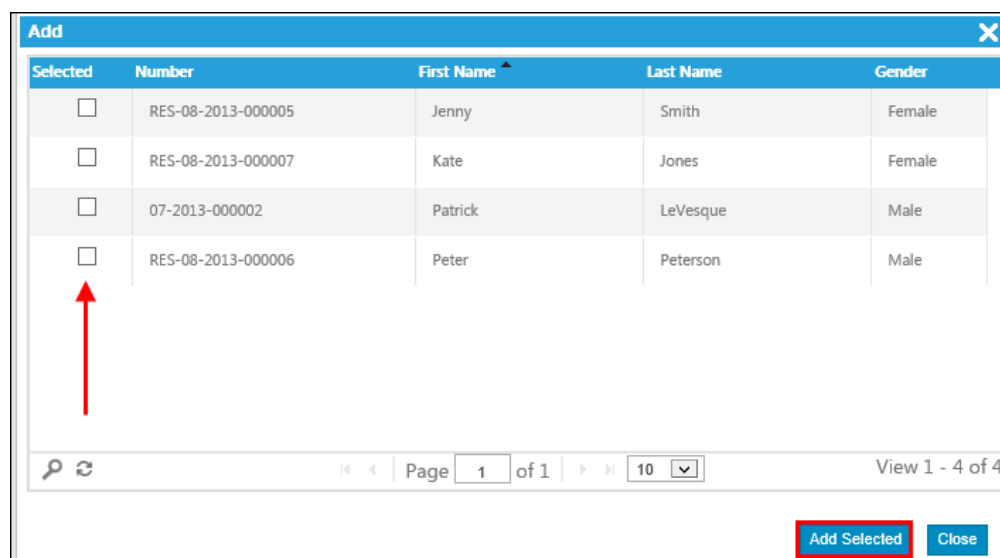
Cancel

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**.

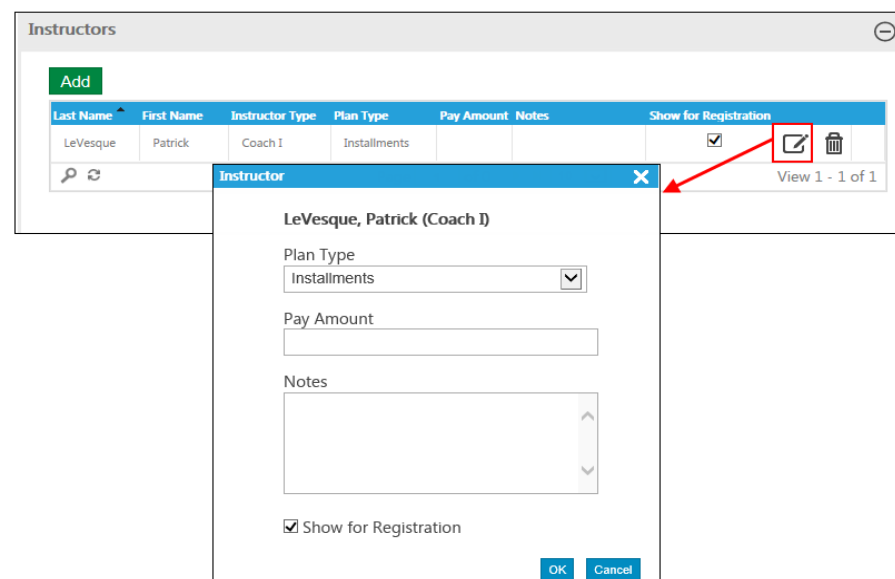


Selected	Number	First Name	Last Name	Gender
<input type="checkbox"/>	RES-08-2013-000005	Jenny	Smith	Female
<input type="checkbox"/>	RES-08-2013-000007	Kate	Jones	Female
<input type="checkbox"/>	07-2013-000002	Patrick	LeVesque	Male
<input type="checkbox"/>	RES-08-2013-000006	Peter	Peterson	Male

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**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.



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

**Instructor** (LeVesque, Patrick (Coach I))

Plan Type: Installments

Pay Amount:

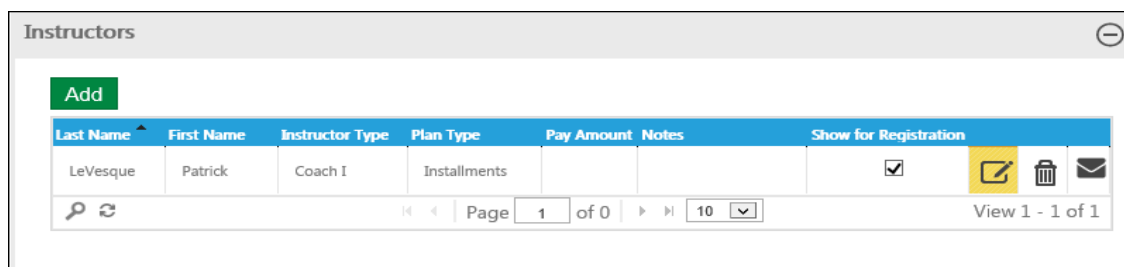
Notes:

☒ 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.

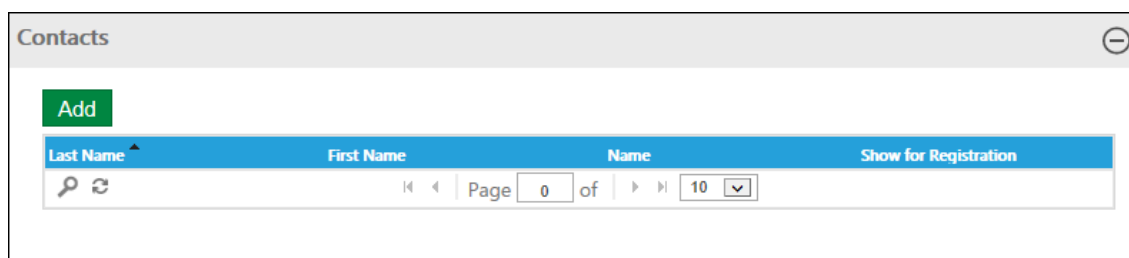


The screenshot shows a web interface titled "Instructors". It features a green "Add" button at the top left. Below it is a table with the following columns: Last Name, First Name, Instructor Type, Plan Type, Pay Amount, Notes, and Show for Registration. A single record is displayed with the following values: Last Name: LeVesque, First Name: Patrick, Instructor Type: Coach I, Plan Type: Installments, Pay Amount: (empty), Notes: (empty), and Show for Registration: ☒. To the right of the table are three icons: a pencil (edit), a trash can (delete), and an envelope (email). At the bottom, there is a pagination bar showing "Page 1 of 0" and a dropdown menu set to "10". The text "View 1 - 1 of 1" is also present.

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.

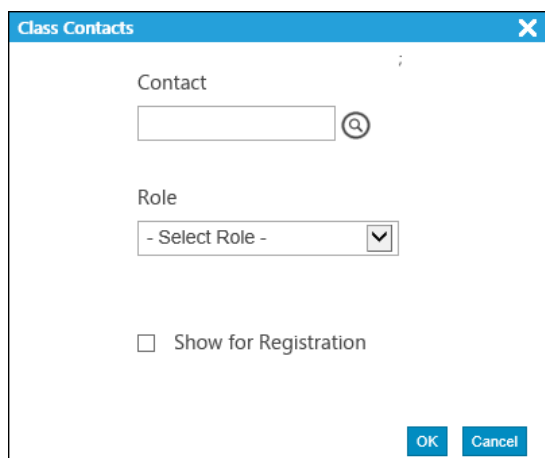
## Contacts

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.



The screenshot shows a web interface titled "Contacts". It features a green "Add" button at the top left. Below it is a table with the following columns: Last Name, First Name, Name, and Show for Registration. The table is currently empty. At the bottom, there is a pagination bar showing "Page 0 of" and a dropdown menu set to "10".

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.



The screenshot shows a dialog box titled "Class Contacts". It contains the following fields: a "Contact" text field with a search icon (magnifying glass) to its right, a "Role" dropdown menu with the text "- Select Role -", and a checkbox labeled "Show for Registration". At the bottom right, there are "OK" and "Cancel" buttons.

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.

Contacts

Add

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

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of 1

⏪

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10

▼

View 1 - 1 of 1

## 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-Ons

Add

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

🔍

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⏪

⏩

Page

1

of 1

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10

▼

View 1 - 1 of 1

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 offering.

🔍

🔄

Class Note

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

🔍

🔄

Add

	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

🔍

🔄

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10

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 <span>▼</span>	12:00 PM <span>▼</span>
Monday	<input type="checkbox"/>	12:00 PM <span>▼</span>	12:00 PM <span>▼</span>
Tuesday	<input type="checkbox"/>	12:00 PM <span>▼</span>	12:00 PM <span>▼</span>
Wednesday	<input type="checkbox"/>	12:00 PM <span>▼</span>	12:00 PM <span>▼</span>
Thursday	<input type="checkbox"/>	12:00 PM <span>▼</span>	12:00 PM <span>▼</span>
Friday	<input type="checkbox"/>	12:00 PM <span>▼</span>	12:00 PM <span>▼</span>
Saturday	<input type="checkbox"/>	12:00 PM <span>▼</span>	12:00 PM <span>▼</span>

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		



Page 1 of 1
10 ▼
View 1 - 4 of 4

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

Description
Percentage

Boy Scouts
5.00

Discount Type\*
Start Date\*

Custom
5/7/2018

End Date

☒ Include Family Members

☒ Include Classes

☒ Include Rentals

☒ Include Memberships

☒ 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\*

Multi-Family ▼

- ☒ Available to Classes
- ☒ Available to Rentals
- ☒ Available to Memberships
- ☒ Available to Non-Resident

Multi-Family Discount Setup

Family Member #2  \$ or  % ↑ ↓ ✕

Family Member #3  \$ or  % ↑ ↓ ✕

Family Member #4  \$ or  % ↑ ↓ ✕

Family Member #5  \$ or  % Add

Save and New

Save

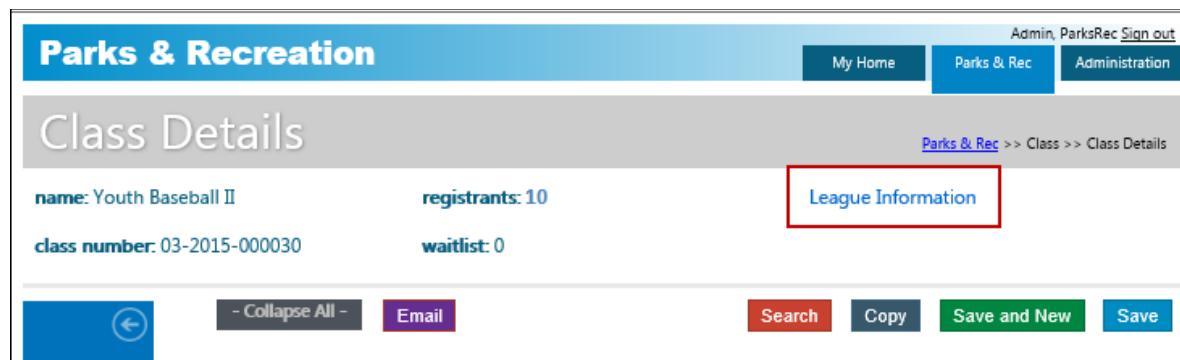
To return to the Class Details page from the Discount Details page, click the **Back to Class** button.

### 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.



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

## Class Details

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

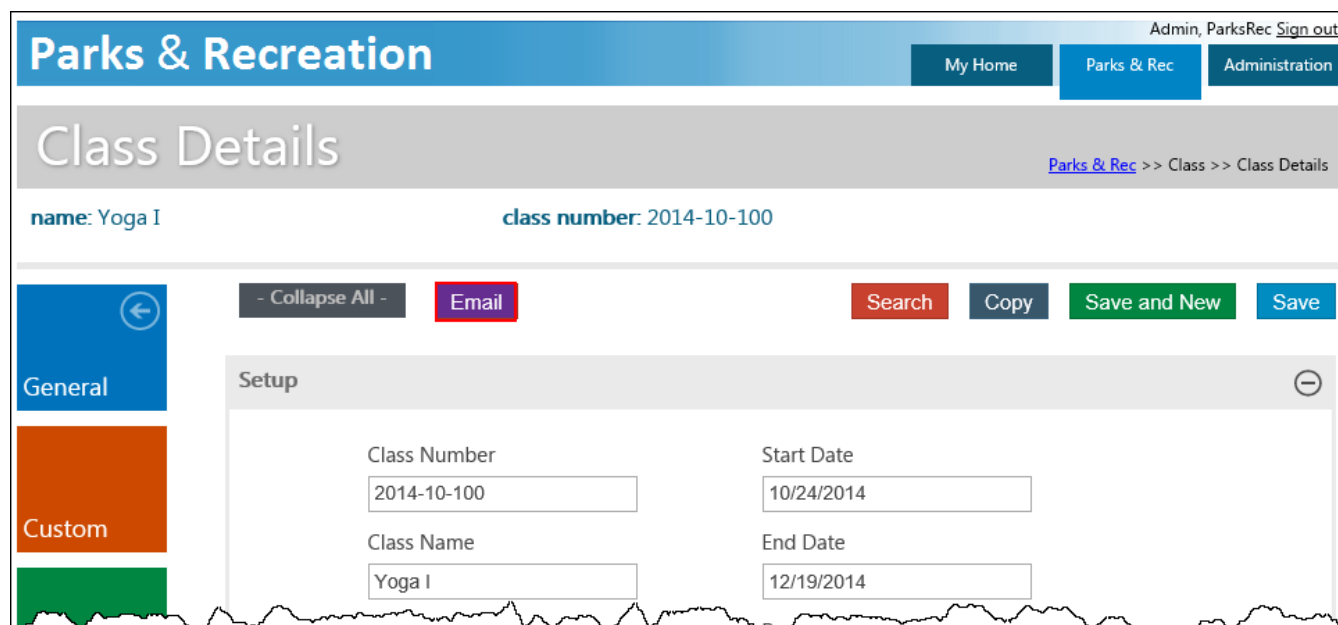
**name:** Youth Baseball II **registrants:** 10 **League Information**

**class number:** 03-2015-000030 **waitlist:** 0

← - Collapse All - Email Search Copy Save and New 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.



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

## Class Details

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

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

← - Collapse All - Email Search Copy Save and New Save

**General**

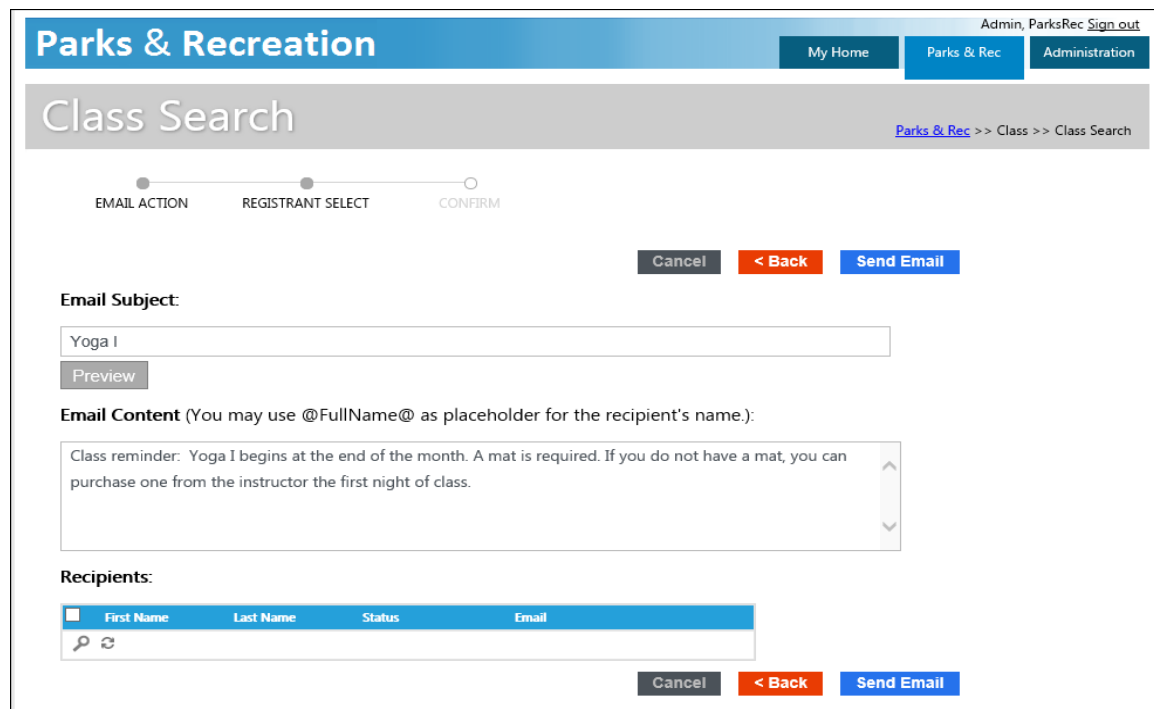
**Custom**

**Setup**

Class Number	Start Date
2014-10-100	10/24/2014
Class Name	End Date
Yoga I	12/19/2014



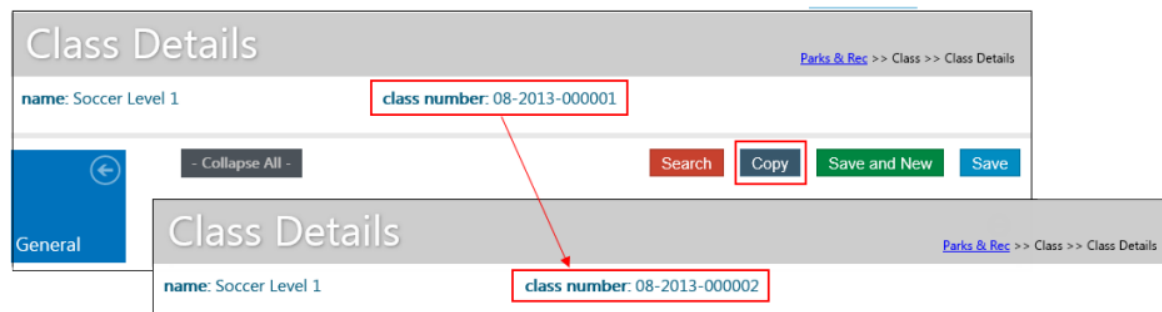
When you select Email, the Email Update provides the option for distributing an email to class registrants who have a valid email address. The Email Update page provides the Email Subject and Email Content fields. The default value for the Email Subject line is the class name, but you can change this.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



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.



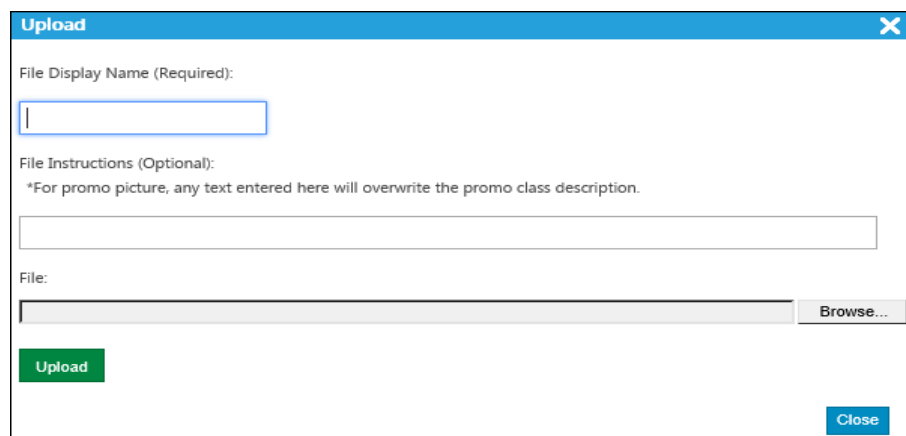
You can update the new record to customize the individual details.

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.



**Upload**

File Display Name (Required):

File Instructions (Optional):  
\*For promo picture, any text entered here will overwrite the promo class description.

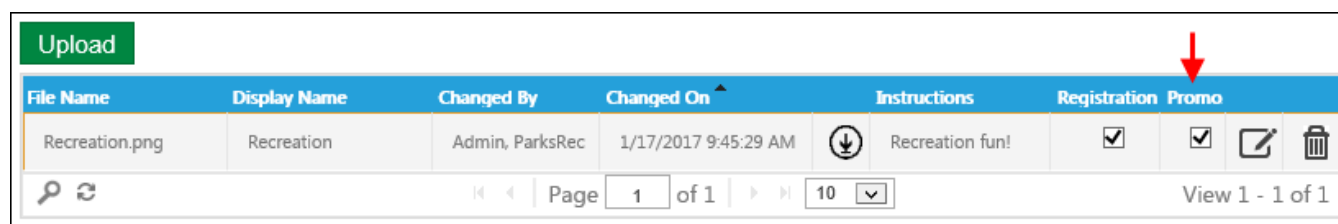
File:

Browse...

Upload

Close

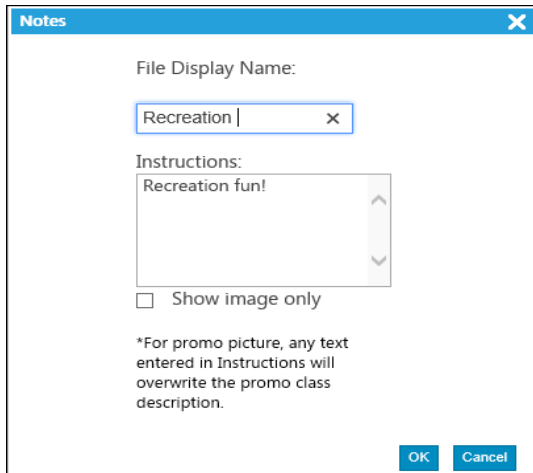
After the image uploads, select the Promo check box to identify the image as a scrolling item. When the Is Special Event check box is selected on the Class Details page, and the Promo check box is selected, the image displays on the citizen portal. When a user hovers his or her pointer over the image,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

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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

File Display Name:

Instructions:

☐ Show image only

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

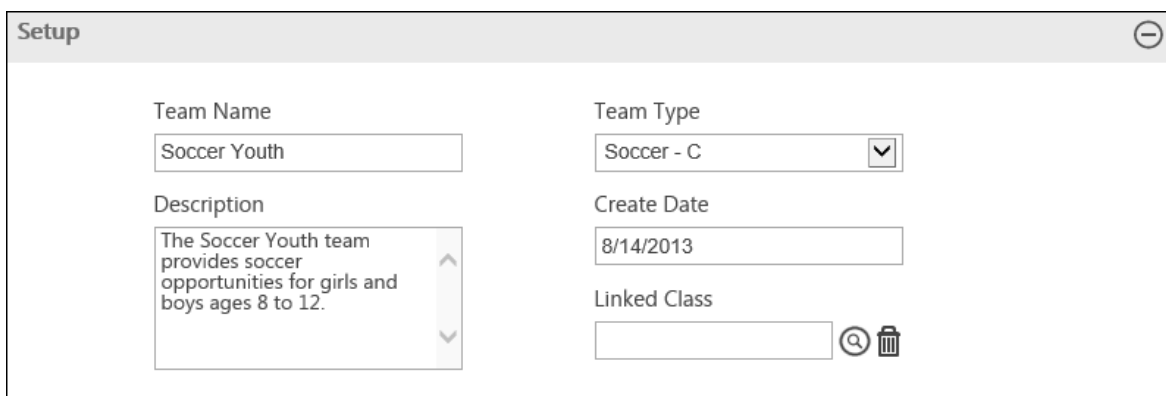
OK Cancel

## 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 type="text" value="Soccer Youth"/>	<p>Team Type</p> <input type="text" value="Soccer - C"/>
<p>Description</p> <input type="text" value="The Soccer Youth team provides soccer opportunities for girls and boys ages 8 to 12."/>	<p>Create Date</p> <input type="text" value="8/14/2013"/>
	<p>Linked Class</p> <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Delete"/>

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.

Registrants			
<a href="#">Add</a> <a href="#">Export</a>			
Last Name	First Name	Team Role	Notes
Smith	Patrick	Captain	
<div> <span>🔍</span> <span>🔄</span> <span>⏪</span> <span>⏩</span> Page <input type="text" value="1"/> of 1         <span>⏪</span> <span>⏩</span> <span>10</span> </div> <div>View 1 - 1 of 1</div>			

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.

### Team Details

name: Soccer Youth      type: Soccer - C

team number: 08-2013-000005

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

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

[General](#)
[Custom](#)
[Documents](#)

- Collapse All -

Setup

Registrants

Notes

[Add](#)

Last Name

Smith

🔍

🔄

First Name

Smith

Last Name

Patrick

Notes

OK

Cancel

📝

🗑️









View 1 - 1 of 1

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

Registrants			
<a href="#">Add</a>			
Last Name	First Name	Team Role	Notes
Smith	Patrick	Captain	Must have inhaler present.
<div> <span>🔍</span> <span>🔄</span> <span>⏪</span> <span>⏩</span> Page <input type="text" value="1"/> of 1         <span>⏪</span> <span>⏩</span> <span>10</span> </div> <div>View 1 - 1 of 1</div>			

## 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				
<a href="#">Add</a>				
Last Name	First Name	Team Role		
Jackson	Harry	Participant		
Jackson	Mary	Participant		
Madison	Marcy	Captain		
  Page 1 of 1 10 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



Role

- Select Role -







OK

Cancel

## Notes

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

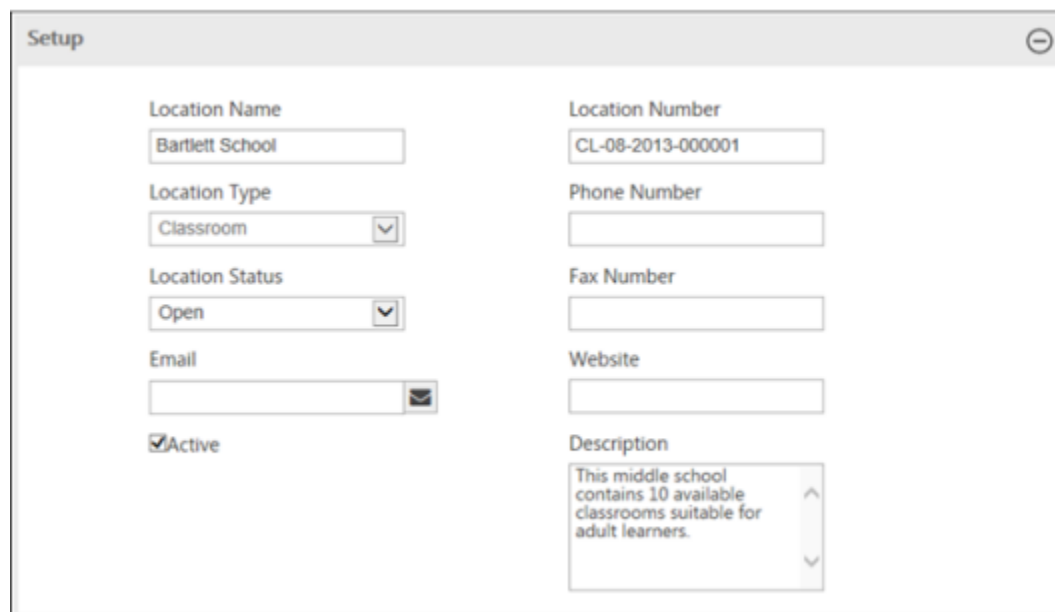
Notes				
<a href="#">Add</a>				
Text	Created By	Create Date		
Teams are subdivided after registration is complete.	System, Admin	08/14/2013 01:08:09 PM		
  Page 1 of 0 10 View 1 - 1 of 1				

## Location

Location maintains location records by type and status.

### Setup

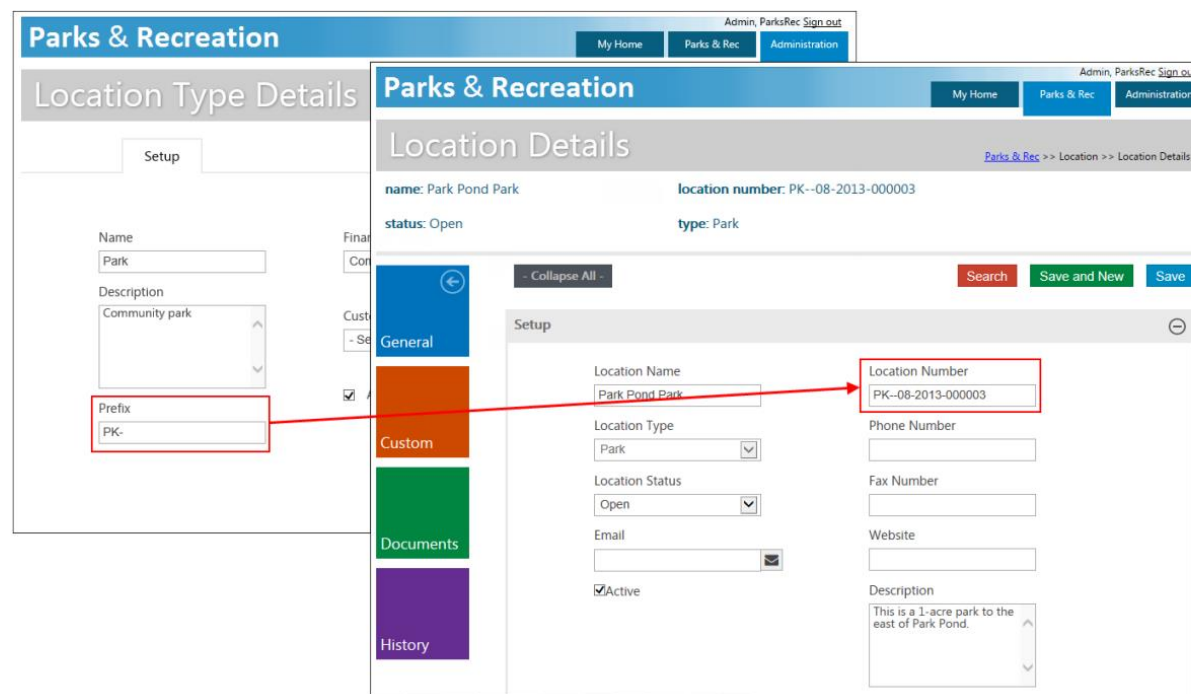
Setup fields provide the location profile: name, type, status, and description. Contact information can also be provided for the site.



The screenshot shows a 'Setup' window for a location record. The fields are as follows:

Field	Value
Location Name	Bartlett School
Location Number	CL-08-2013-000001
Location Type	Classroom
Phone Number	
Location Status	Open
Fax Number	
Email	
Website	
Active	<input checked="" type="checkbox"/>
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.



The screenshot shows the 'Location Details' page for 'Park Pond Park'. A callout box on the left, titled 'Location Type Details', shows the 'Prefix' field set to 'PK-'. A red arrow points from this prefix to the 'Location Number' field in the main 'Setup' window, which displays 'PK-08-2013-000003'. The main 'Setup' window fields are as follows:

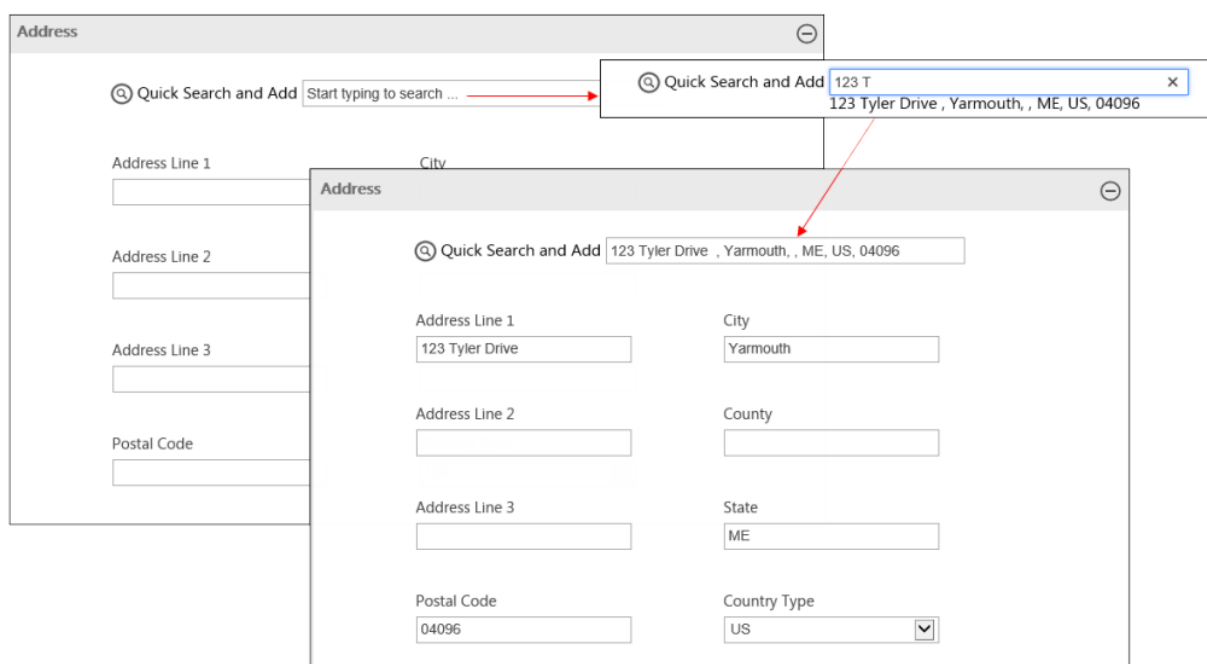
Field	Value
Location Name	Park Pond Park
Location Number	PK-08-2013-000003
Location Type	Park
Location Status	Open
Phone Number	
Fax Number	
Email	
Website	
Active	<input checked="" type="checkbox"/>
Description	This is a 1-acre park to the east of Park Pond.

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

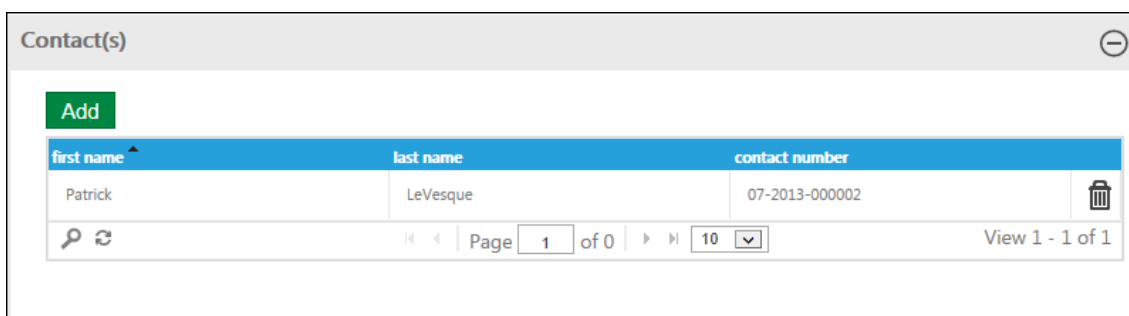
The Address section provides essential address components for the location. Use the Quick Search and Add feature to complete the details for existing addresses.



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.



first name	last name	contact number
Patrick	LeVesque	07-2013-000002

## 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.

Notes

Add

Text

This location can be used for indoor and outdoor events.

Page 1 of 0

View 1 - 1 of 1

## 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.

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Administration

Admin, ParksRec Sign out

Transaction Search

Parks & Rec >> Transaction >> Transaction Search

Search Transactions

Start Date

End Date

Minimum Amount

Maximum Amount

1/4/2018 12:00 AM

1/4/2018 11:17 AM

Type

Status

Receipt Number

Fee Name

All selected

All selected

Debit Account

Credit Account

Processed By

GL Export Status

Not Exported, Export...

Payment Method

Paid By

Invoice Number

GL Export Reference

All selected

AP Export Status

Keyword

Registrant/Team

Reference Number

Not Exported, Export...

Department Name

All selected

Export

Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By
<div> <div>Page 1 of 0</div> <div>10</div> </div>							

No records to view

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.

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Administration

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

GL Export

Start Date

8/2/2018 12:00 AM

End Date

8/3/2018 12:00 AM

Minimum Amount

Maximum Amount

Type

All selected

Status

All selected

Receipt Number

Fee Name

Debit Account

Credit Account

Processed By

GL Export Status

Not Exported

Payment Method

All selected

Paid By

Invoice Number

GL Export Reference

Keyword


Registrant/Team

Reference Number

Department Name

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.

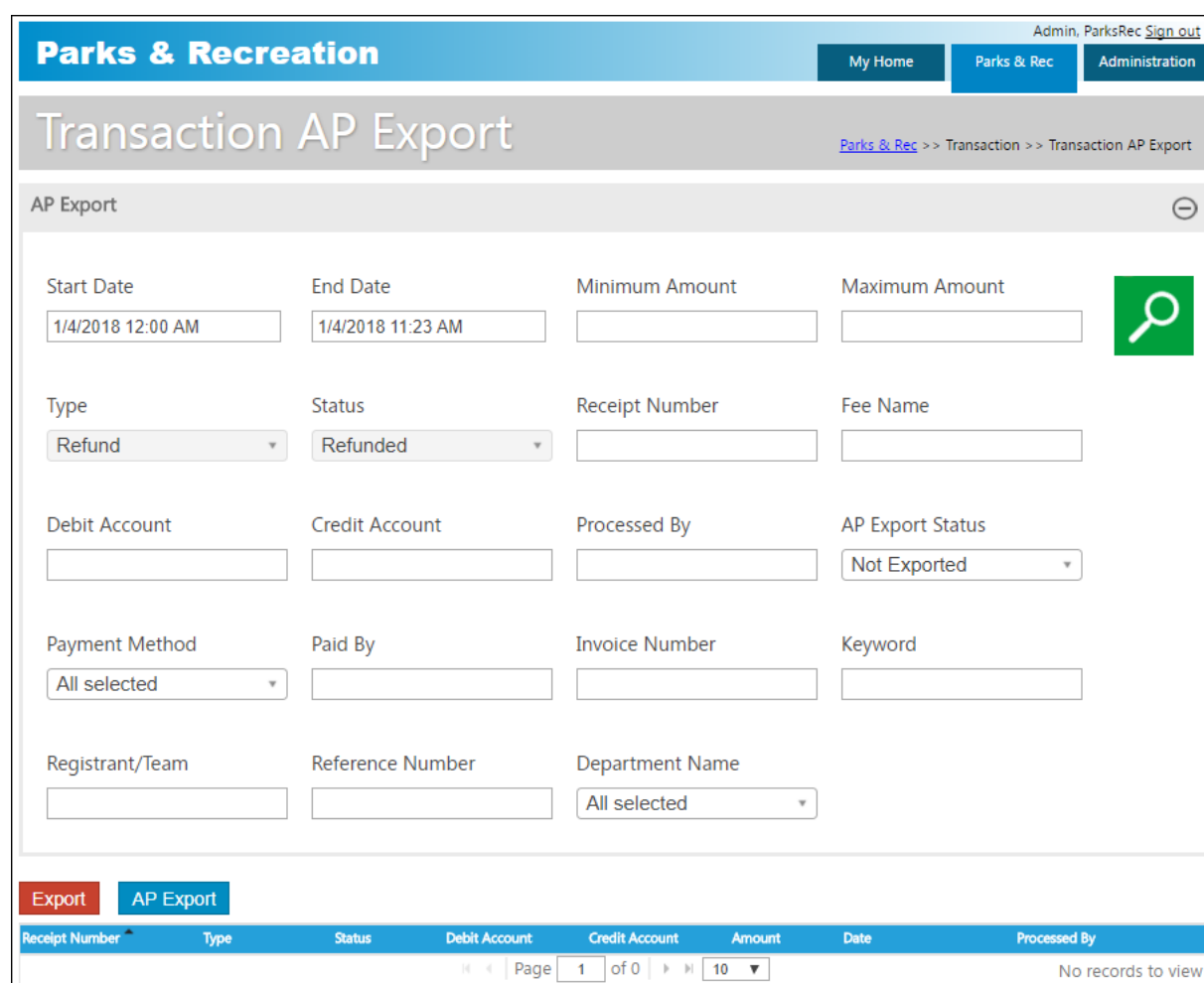
To include \$0.00 receipts in the GL export, select the Include Zero Amount Transactions check box.

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.




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# Transaction AP Export

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

AP Export

Start Date: 1/4/2018 12:00 AM End Date: 1/4/2018 11:23 AM Minimum Amount: Maximum Amount: 

Type: Refund Status: Refunded Receipt Number: Fee Name:

Debit Account: Credit Account: Processed By: AP Export Status: Not Exported

Payment Method: All selected Paid By: Invoice Number: Keyword:

Registrant/Team: Reference Number: Department Name: All selected

[Export](#) [AP Export](#)

Receipt Number	Type	Status	Debit Account	Credit Account	Amount	Date	Processed By
Page 1 of 0 10 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.

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

Collection Export

Start Date

8/2/2018 12:00 AM

End Date

8/3/2018 12:00 AM

Minimum Amount

Maximum Amount

Type

Fee Payment

Status

Complete

Receipt Number

Fee Name

Debit Account

Credit Account

Processed By

Collection Export Status

Not Exported

Payment Method

All selected

Paid By

Invoice Number

GL Export Reference

Keyword


Registrant/Team

Reference Number

Department Name

All selected

☐ Include Zero Amount Transactions



Export

Collection Export

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.

## Invoice ACH Processing

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

### 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	Filename	Created By
<div> <a href="#">Refresh</a> Page <input type="text" value="1"/> of 0           <a href="#">Next</a> </div> <div> <a href="#">Previous</a> </div>		

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.

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Administration

Invoice ACH Processing
Parks & Rec >> Invoice >> Invoice ACH Processing

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
Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

Invoice ACH Processing
Parks & Rec >> Invoice >> Invoice ACH Processing

Save

Select the bank accounts which have been pre-approved.

<input type="checkbox"/>	Contact Number	First Name	Last Name	Email	Bank	Bank Account Type
<input type="checkbox"/>	RES-06-2015-0000	Marilyn	Jackson		BCC Bank	Checking
<input type="checkbox"/>	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

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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

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

Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

Invoice ACH Processing
[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](#)

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

## Invoice Search

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

Search Invoices

Invoiced Start Date

Invoiced End Date

Minimum Amount

Maximum Amount

Fee Name

Payer Number

Payer Name

Processed By

Invoice Number

Item Name

Item Number

AR Export Status

All ☐

Export

Page 1 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.



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Admin, ParksRec [Sign out](#)

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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	\$ 0.00
General Participation Fee (1 at \$250.00 ea.)	\$250.00	\$0.00	\$ 0.00
General Participation Fee (1 at \$300.00 ea.)	\$300.00	\$0.00	\$ 0.00
General Participation Fee (1 at \$300.00 ea.)	\$300.00	\$300.00	\$ 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
Fri, June 30, 2017 8:
Location: [Hayward A](#)  
15 attending

Buy	Name	Supple. Name	Supple. Data	Quantity	Fee
<input type="checkbox"/>	Skate Shop			1	\$300.00
<input type="checkbox"/>	Security Guard			1	\$250.00

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





☒ 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

My Home
Parks & Rec
Administration

Admin, ParksRec Sign out

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

### 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
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

Run Report


**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

14 of 4 100% Find & Next

**Tyler Parks & Recreation**  
**Class Listing**  
Start date: 9/1/2013  
End date: 1/3/2014  
Class Status: Any  
Class Type: Any  
Class Category: Any

Class Code	Class Name	Status	Class Type	Start Date	End Date	Days of Week	Registered	Waiting
AT-101	Basic Sketching	Active	Classroom	10/14/2013	11/15/2013	Mo Tu We	2	0
S-Soccer	Soccer Level 1	Active	Athletic - Outside	9/9/2013	11/26/2013		0	0
A-Soccer	Adult Soccer	Active	Athletic - Indoor	10/11/2013	12/13/2013	Tu	4	0
HK-101	Hiking	Active	Athletic - Outside	9/21/2013	9/21/2013	Sa	0	0
AY-03-2013	Advanced Yoga	Active	Health and Fitness	9/30/2013	12/31/2013	Mo We Fr	4	0
09-2013-000003	Adult Soccer	Active	Athletic - Indoor	10/11/2013	12/13/2013	Tu	4	0
FPB2013	Youth Flag Football	Active	Athletic - Outside	9/9/2013	11/26/2013	Mo We	0	0
2013-10-01	Wrestling Making	Active	Classroom	11/18/2013	12/20/2013		1	0
11-2013-000004	Running	Active	Athletic - Indoor	1/3/2014	4/25/2014	Tu	0	0
12-2013-000009	Soccer Level 1	Active	Athletic - Outside	9/9/2013	11/26/2013		0	0

1/6/2014 10:48:39 AM  
Page 1 of 1

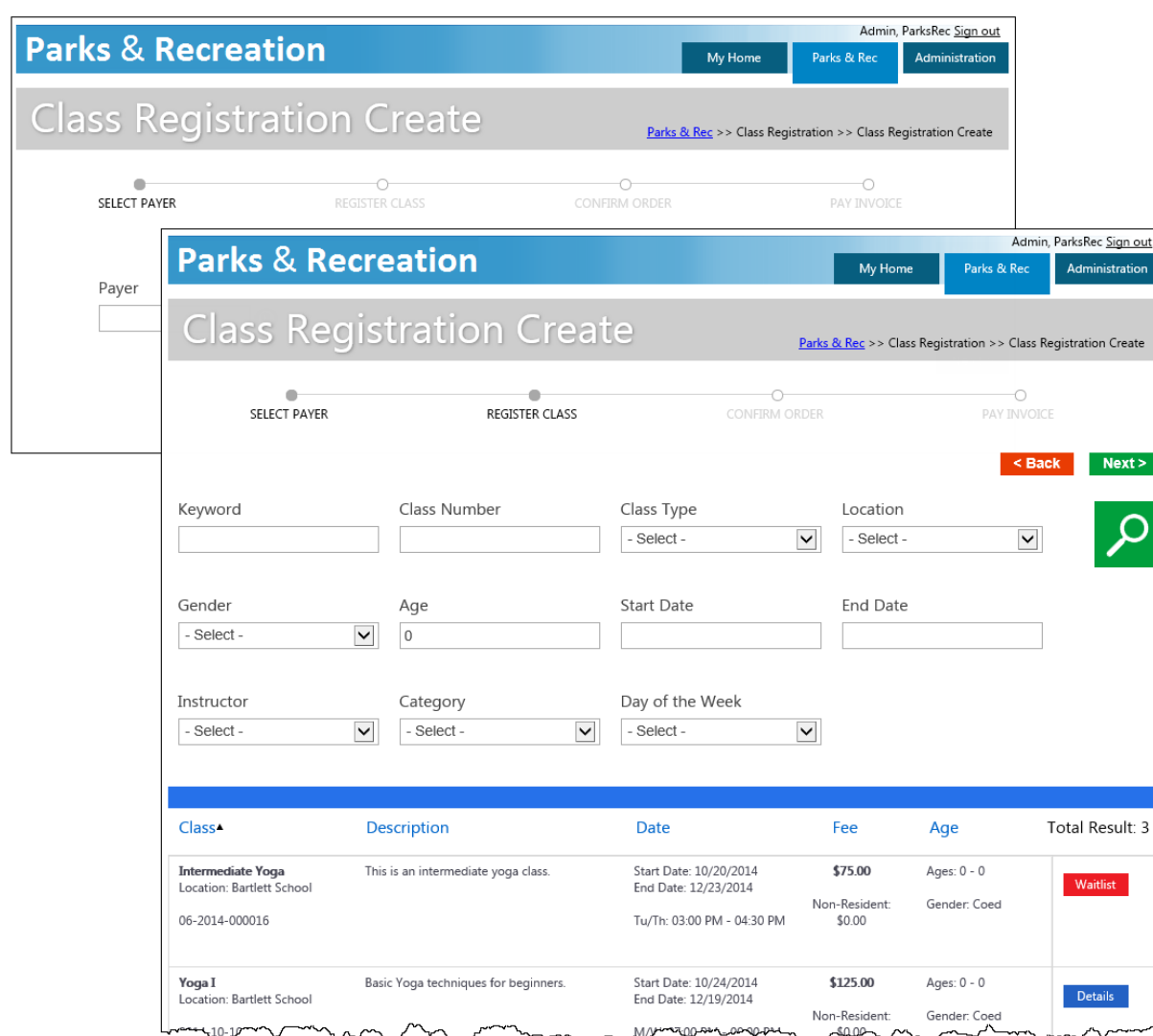
## Class Registration

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.



The screenshot shows the 'Class Registration Create' page with a progress bar indicating the current step is 'REGISTER CLASS'. The search criteria section includes the following fields:

- Keyword:
- Class Number:
- Class Type:
- Location:
- Gender:
- Age:
- Start Date:
- End Date:
- Instructor:
- Category:
- Day of the Week:

Below the search criteria is a table of results:

Class	Description	Date	Fee	Age	Total Result: 3
<b>Intermediate Yoga</b> 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	<b>\$75.00</b> Non-Resident: \$0.00	Ages: 0 - 0 Gender: Coed	<a href="#">Waitlist</a>
<b>Yoga I</b> Location: Bartlett School	Basic Yoga techniques for beginners.	Start Date: 10/24/2014 End Date: 12/19/2014	<b>\$125.00</b> Non-Resident: \$0.00	Ages: 0 - 0 Gender: Coed	<a href="#">Details</a>

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. • another bullet • and another bold italics 1. numbered list 2. 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 Discounts Available	City of Tyler Employee Employee Middle Age Multi Family	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.

Summary

Summer Camp Week 3

07-2018-000412

Total: \$62.00

Parks & Recreation

Admin, ParksRec Sign out

My Home

Parks & Rec

Administration

Contact Search

Parks & Rec >> Contact >> Contact Search

Add new dependent

Registrant:

Beaumont, Cha

Fee: \$60

Start Date: 2/12/2019

End Date: 10/31/2019

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

Attachments

CONTACT DETAILS

Confirm

Wallace Beaumont

Troy, MI 48091

Contact Preference: Unspecified

Summer Camp Week 3

07-2018-000412

Total: \$62.00

Add new dependent

Registrant:

Beaumont, Wallace | Child | Age:13

Fee: \$60.00

Start Date: 2/12/2019

End Date: 10/31/2019

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

Attachments

Location: Johnson Park

Age Range: 5 - 99

Gender: Coed

Capacity: 1 - 100

Group:

Upload

File (Required):

Choose File

No file chosen

Description:

Upload

Cancel

Add-Ons

Name

Fee

Quantity

Buy

Register

Cancel

The Summary page also lists available discounts.

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

Summary

Summer Camp Week 3

07-2018-000412

Total: \$62.00

Add new dependent

Registrant:

Beaumont, Wallace | Child | Age:13

Fee: \$60.00

Start Date: 2/12/2019

End Date: 10/31/2019

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

Attachments

Location: Johnson Park

Age Range: 5 - 99

Gender: Coed

Capacity: 1 - 100

Group:

Upload

File (Required):

Choose File

No file chosen

Description:

Upload

Cancel

Add-Ons

Name

Fee

Quantity

Buy

Register

Cancel

Tyler Parks and Recreation 2018.3

75

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

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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

Registrant:  
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.



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Admin, ParksRec [Sign out](#)
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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, 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
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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

[My Home](#)
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[Administration](#)

# 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](#)

### 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

Pay Now

Invoice

## Parks & Recreation

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

# 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.

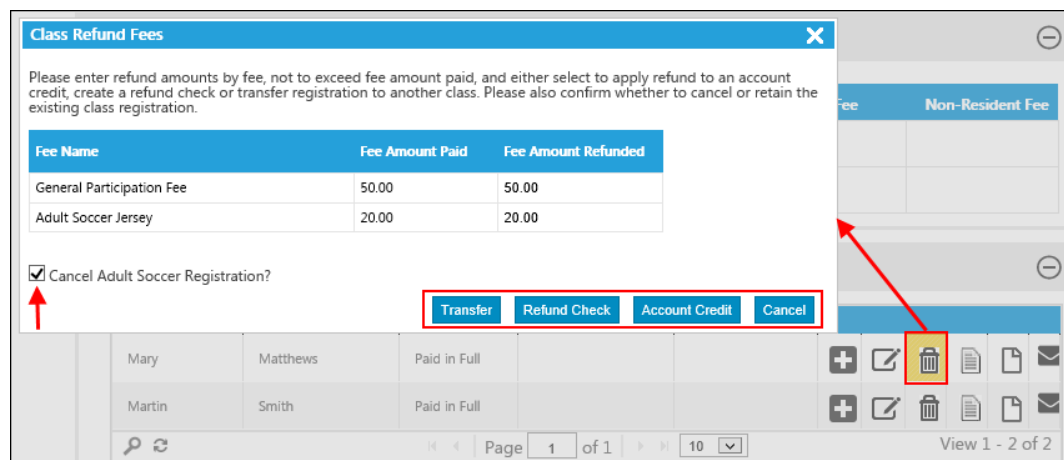
### Waitlists

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.



**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 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

Page 1 of 1 10 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.

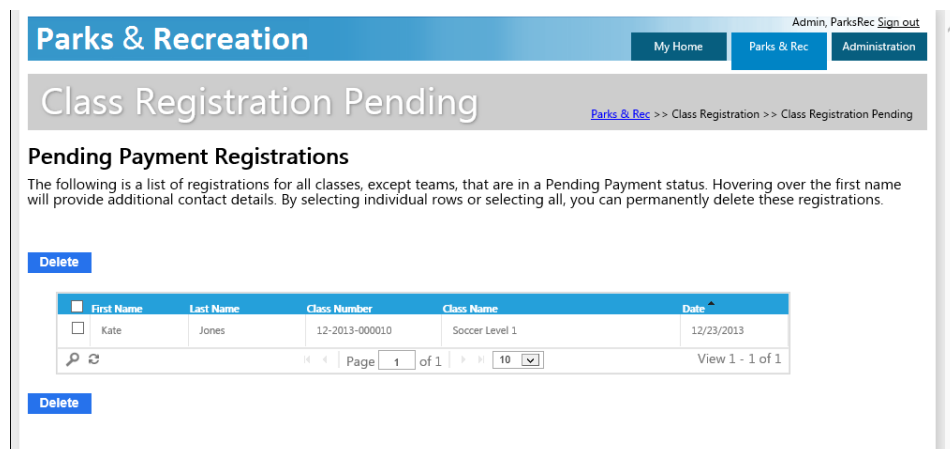
The Cancel <Class Name> Registration? check box directs the program to cancel the registration in addition to issuing the refund. If you clear this check box, the Class Refund Fees dialog box refreshes to remove the Transfer option. In this case, the refund is processed, but the class registration remains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



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

### Class Registration Pending

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

#### Pending Payment Registrations

The following is a list of registrations for all classes, except teams, that are in a Pending Payment status. Hovering over the first name will provide additional contact details. By selecting individual rows or selecting all, you can permanently delete these registrations.

**Delete**

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

Page 1 of 1 View 1 - 1 of 1

**Delete**

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.

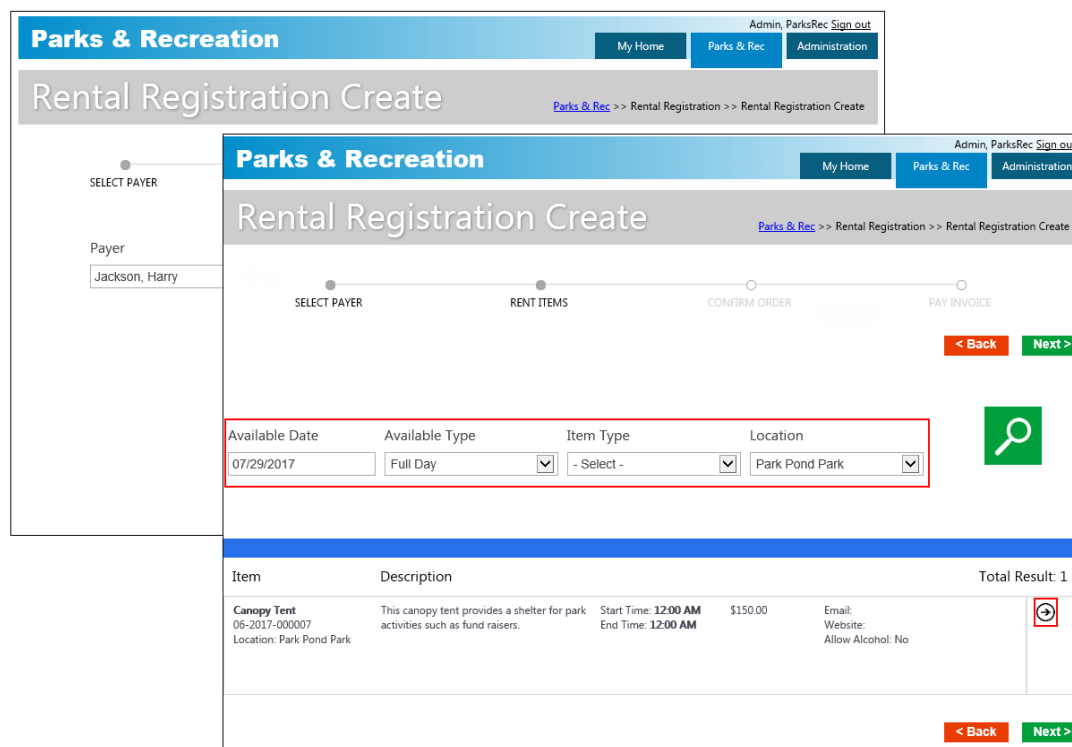
The Rental Registration Approvals page is available for managing the approval process for rental facilities or items for which approval is required.

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** Admin, ParksRec Sign out  
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Rental Registration Create [Parks & Rec >> Rental Registration >> Rental Registration Create](#)

SELECT PAYER

Payer  
Jackson, Harry

SELECT PAYER RENT ITEMS CONFIRM ORDER PAY INVOICE

< Back Next >

Available Date Available Type Item Type Location

07/29/2017 Full Day - Select - Park Pond Park

Search

Item	Description	Start Time	End Time	Price	Email	Website	Allow Alcohol
Canopy Tent 06-2017-000007 Location: Park Pond Park	This canopy tent provides a shelter for park activities such as fund raisers.	12:00 AM	12:00 AM	\$150.00	Email:	Website:	Allow Alcohol: No

Total Result: 1

< Back Next >

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

Attachments

Add

Number Of Attendees

40

Add-Ons

Name	Fee	Quantity	Buy
Celebration Flags	\$15.00	1	<input type="checkbox"/>

Description:

This canopy tent provides a shelter for park activities such as fund raisers.

Register

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

Cash

Receipt for Expense

Pay Now

Invoice

VISA

MasterCard

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

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## 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

Cash

Receipt for Expense

Pay Now

Invoice

VISA

MasterCard

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.

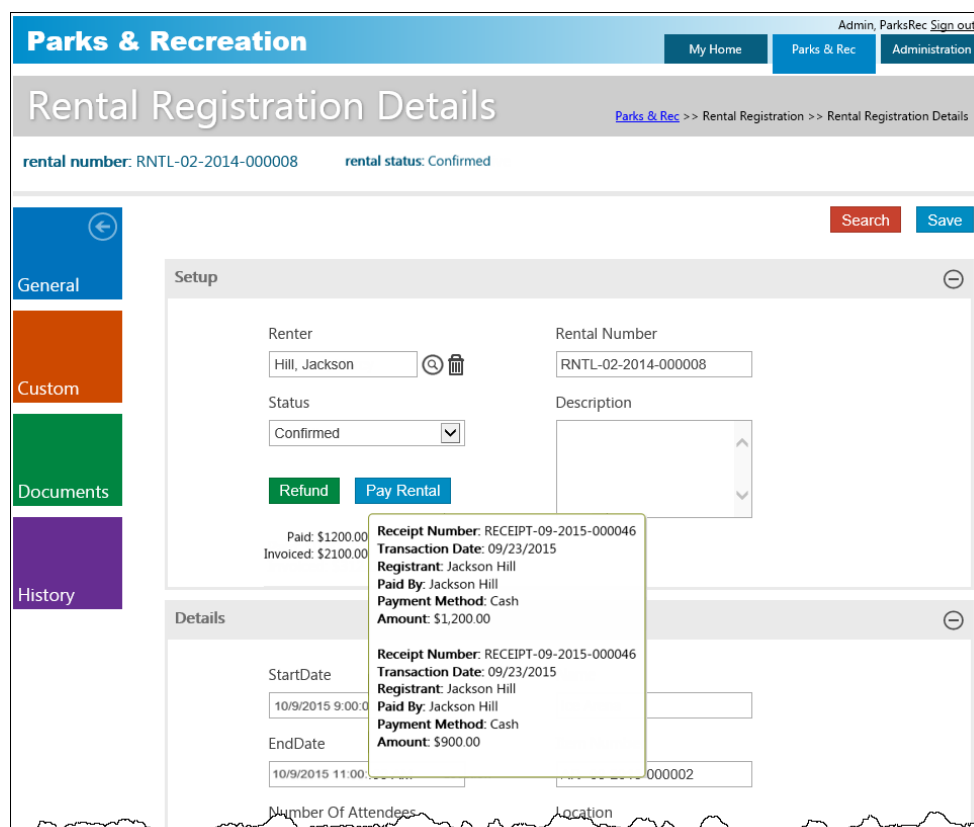
Payment				<input type="radio"/> Full <input checked="" type="radio"/> Split/Partial
pay. method	pay. amount	supple. data	value	<div>Pay Now Invoice</div> <div>    <input checked="" type="checkbox"/> Email Receipt?         </div>
Cash	\$ 1450.00	Receipt for Expense		
CustomerCreditCard	\$			
Bal: \$0.00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

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  
My Home Parks & Rec Administration

## 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: Hill, Jackson Rental Number: RNTL-02-2014-000008

Status: Confirmed Description:

Refund Pay Rental

Paid: \$1200.00 Invoiced: \$2100.00

**Details**

StartDate: 10/9/2015 9:00:00 EndDate: 10/9/2015 11:00:00

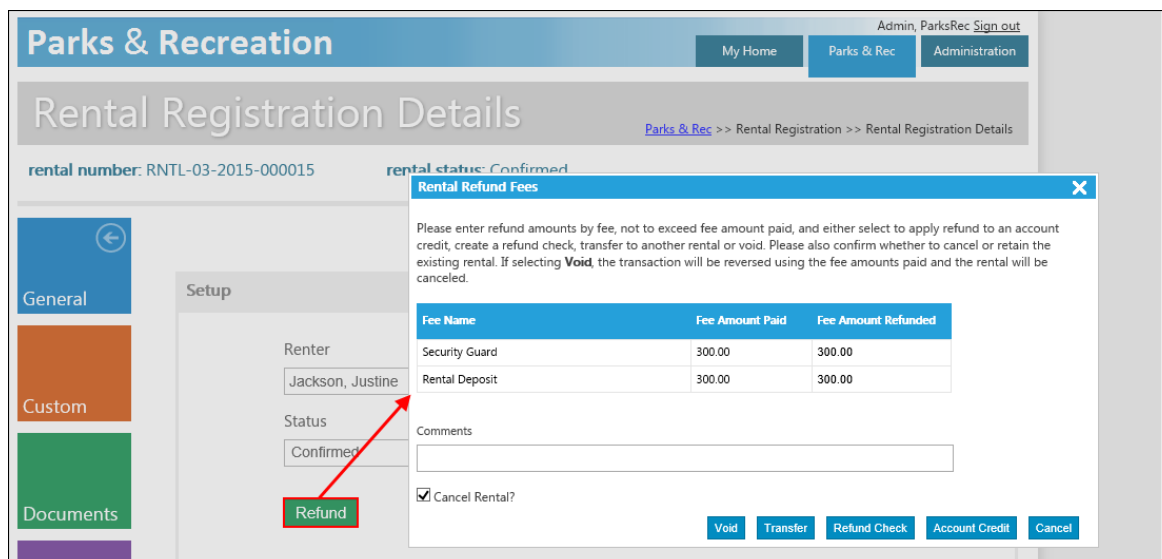
Number Of Attendees: 000002 Location:

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

Receipt Number: RECEIPT-09-2015-000046  
Transaction Date: 09/23/2015  
Registrant: Jackson Hill  
Paid By: Jackson Hill  
Payment Method: Cash  
Amount: \$900.00

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.



**Parks & Recreation**

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## Rental Registration Details

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

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

**General**

**Custom**

**Documents**

**Setup**

Renter: Jackson, Justine

Status: Confirmed

**Refund**

**Rental 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 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?

[Void](#) [Transfer](#) [Refund Check](#) [Account Credit](#) [Cancel](#)

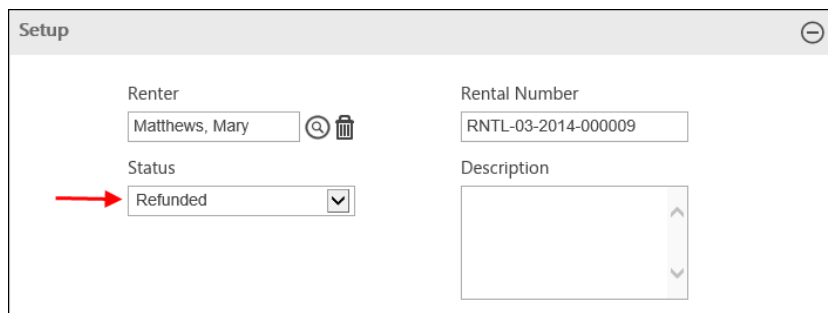
Refund options are:

- **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.



**Setup**

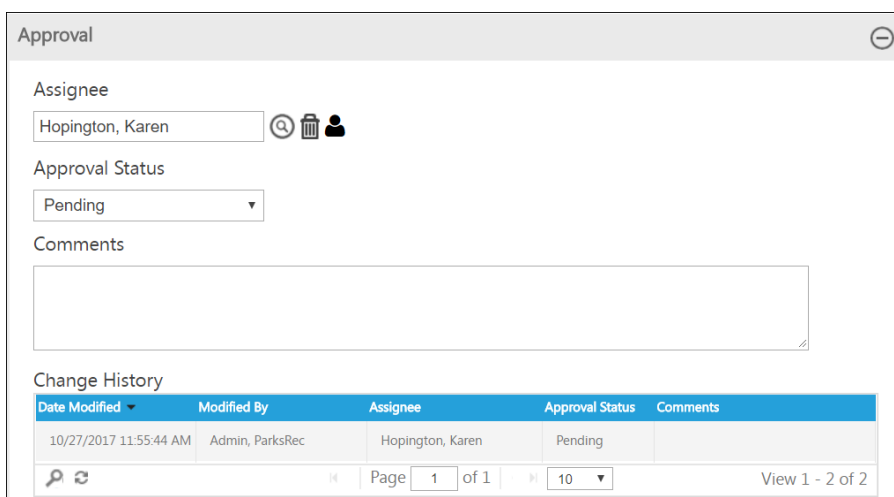
Renter: Matthews, Mary

Rental Number: RNTL-03-2014-000009

Status: **Refunded**

Description:

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.



**Approval**

Assignee: Hopington, Karen

Approval Status: Pending

Comments:

Change History

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

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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

Search
Save

Setup

Renter

Status

Refund
Pay Rental

Paid: \$0.00  
Invoiced: \$312.00

Rental Number

Description

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

Fee

Last Name

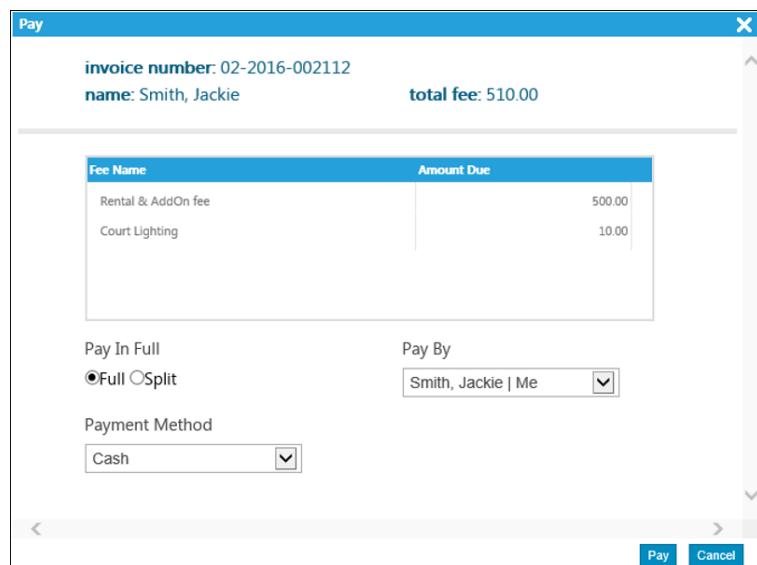
Registrant Total

Add-On

Add-On	Fee	Number	Suppl. Name	Supple. Value	Buy
Court Lighting	10	<input type="text" value="1"/>	Court	<input type="text" value="Court #1"/>	<input checked="" type="checkbox"/>

OK
Cancel

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



The Payment dialog box displays the following information:

- invoice number: 02-2016-002112
- name: Smith, Jackie
- total fee: 510.00

Fee Name	Amount Due
Rental & AddOn fee	500.00
Court Lighting	10.00

Pay In Full: ☒ Full ☐ Split

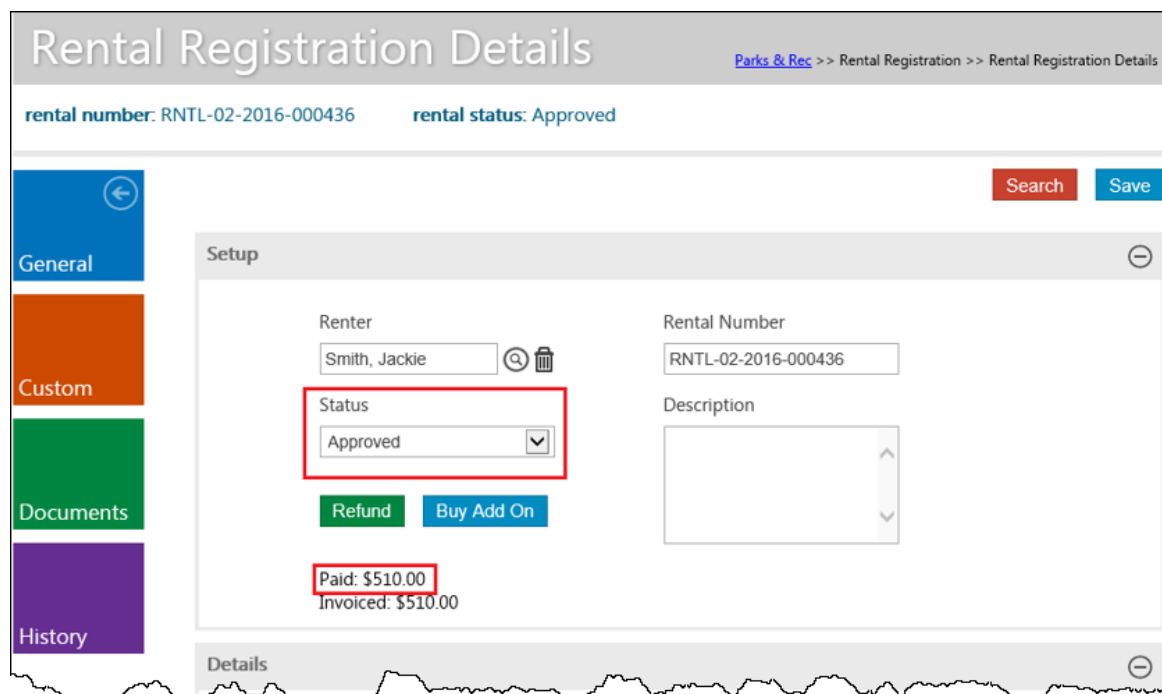
Payment Method:

Pay By:

Buttons: Pay, Cancel

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.



The Rental Registration Details page displays the following information:

- rental number: RNTL-02-2016-000436
- rental status: Approved

Buttons: Search, Save

Left sidebar: General, Custom, Documents, History

Setup section:

- Renter:
- Rental Number:
- Status:  (highlighted with a red box)
- Description:
- Buttons: Refund, Buy Add On
- Paid: \$510.00 (highlighted with a red box)
- Invoiced: \$510.00

Details section:

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
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My Home
Parks & Rec
Administration

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

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

Search
Save

General
Custom
Documents
History

Setup
Renter: Matthews, Mary
Rental Number: RNTL-06-2017-
Status: Confirmed
Description:
Paid: \$1450.00
Invoiced: \$1450.00
Refund
View Invoice
Details
Start Date: 6/30/2017 12:00:00 PM
End Date: 6/30/2017 3:00:00 PM
Number Of Attendees: 15
Name: Ice Arena
Item Number: AR-08-2013-000
Location: Hayward Arena
Item Available Type:

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Administration

Invoice Details
Parks & Rec >> Invoice >> 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
X

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

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

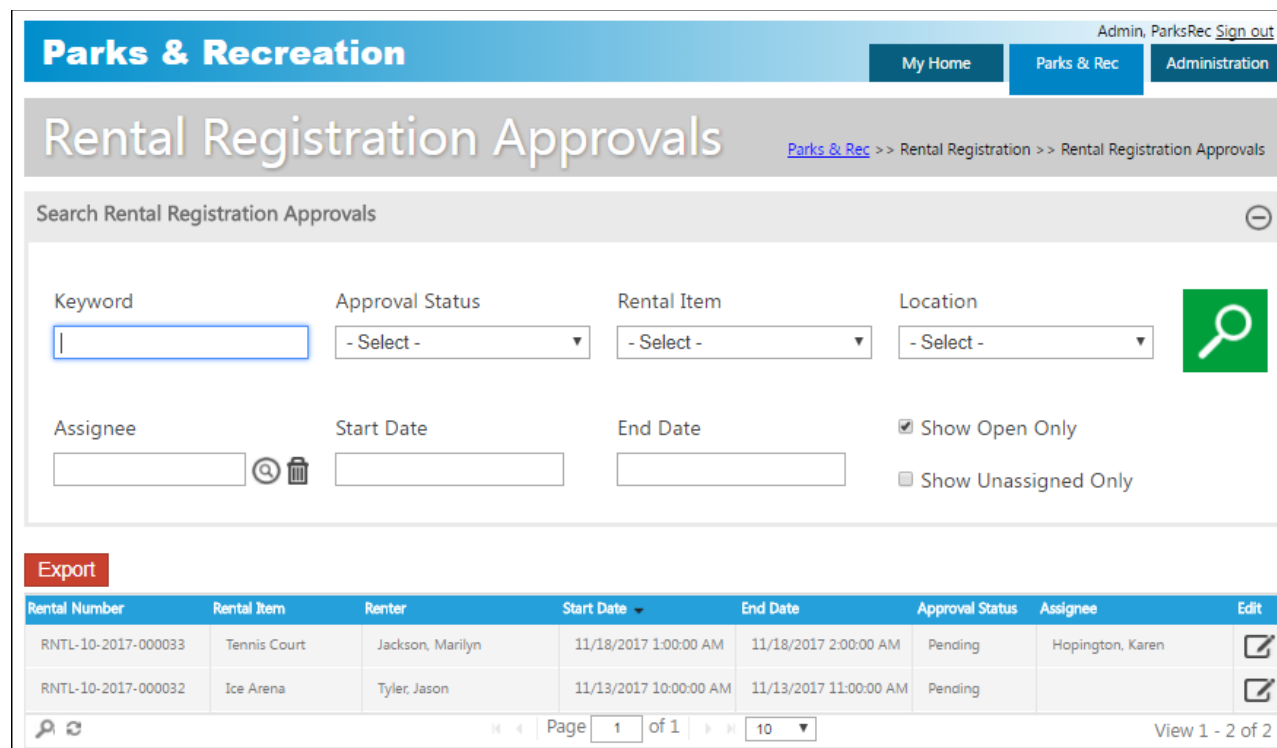
Total Amount: \$0.00

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.



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# Rental Registration Approvals

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

Search Rental Registration Approvals

Keyword:  Approval Status:  Rental Item:  Location:

Assignee:  Start Date:  End Date:

☒ Show Open Only ☐ Show Unassigned Only

**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	
RNTL-10-2017-000032	Ice Arena	Tyler, Jason	11/13/2017 10:00:00 AM	11/13/2017 11:00:00 AM	Pending		

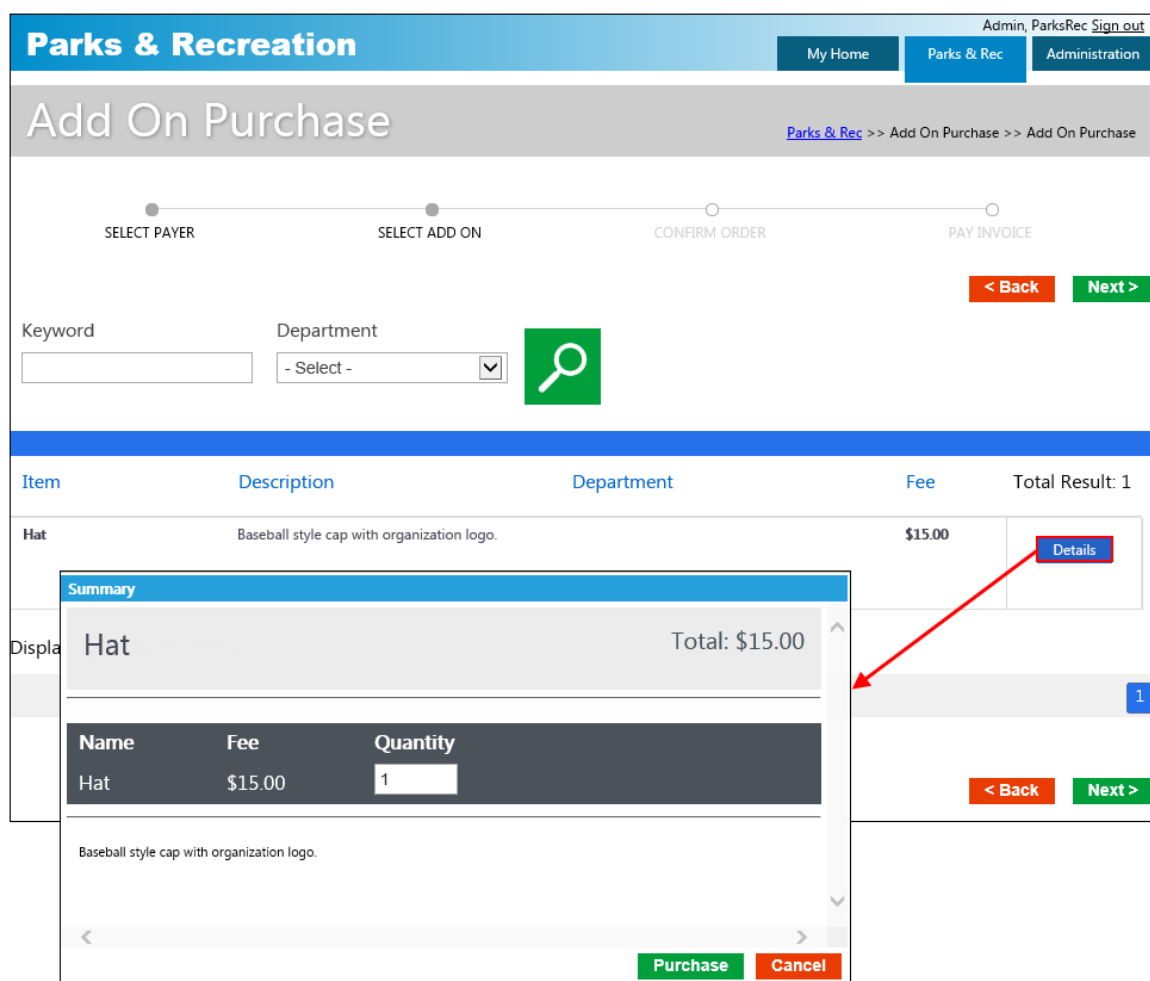
Page 1 of 1 10 View 1 - 2 of 2

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.



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### Add On Purchase

[Parks & Rec](#) >> Add On Purchase >> Add On Purchase

SELECT PAYER SELECT ADD ON CONFIRM ORDER PAY INVOICE

< Back Next >

Keyword Department - Select - 

Item	Description	Department	Fee	Total Result: 1
Hat	Baseball style cap with organization logo.		\$15.00	<a href="#">Details</a>

**Summary**

Hat Total: \$15.00

Name	Fee	Quantity
Hat	\$15.00	1

Baseball style cap with organization logo.

Purchase Cancel

< Back Next >

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

Canopy Tent

Registration Start

Item Type

Equipment

Registration Deadline

Item Status

Open

Fee

150.00

Location

Park Pond Park

Non Resident Fee

175.00

Available Type

Canopy

Fee Template

- Select -

Show on Portal

☒

Allow Portal Registration

☒

Maximum Occupancy

50

Maximum Days Booked in Advance

0

Minimum Days Booked in Advance

0

Description

Font Family

Font Sizes

B

I

U

S

A

A

Formats

This canopy tent provides a shelter for park activities such as fund raisers.

Registration Receipt Note

Font Family

Font Sizes

B

I

U

S

A

A

Formats

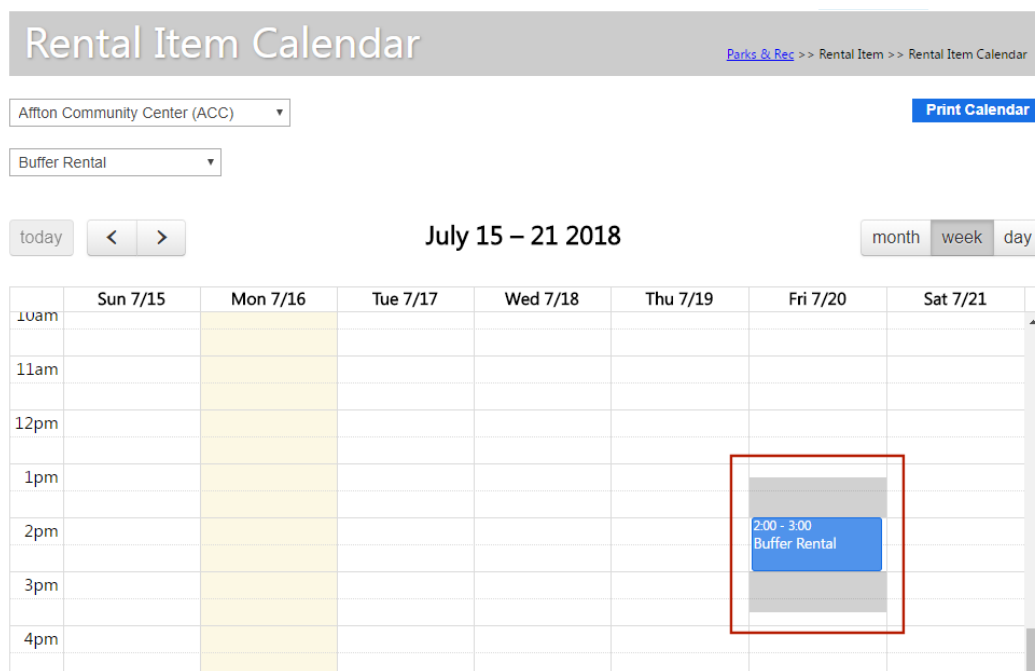
The Registration Start and Registration Deadline fields indicate when the item is available for rental.

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)

Take Down Time (minutes)

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.

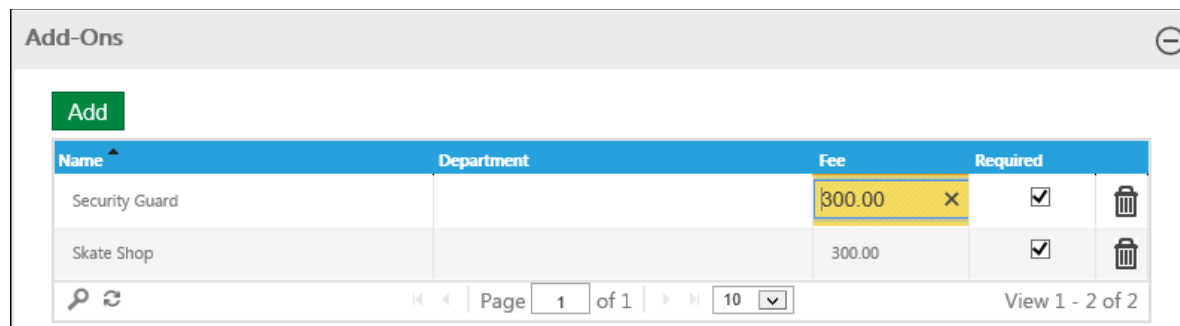
In addition to general rental information, the Rental Details page provides options for determining rental requirements and assigning miscellaneous administrative settings.

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 <b>Register</b> button is available. When the user clicks <b>Register</b> , 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"/>	

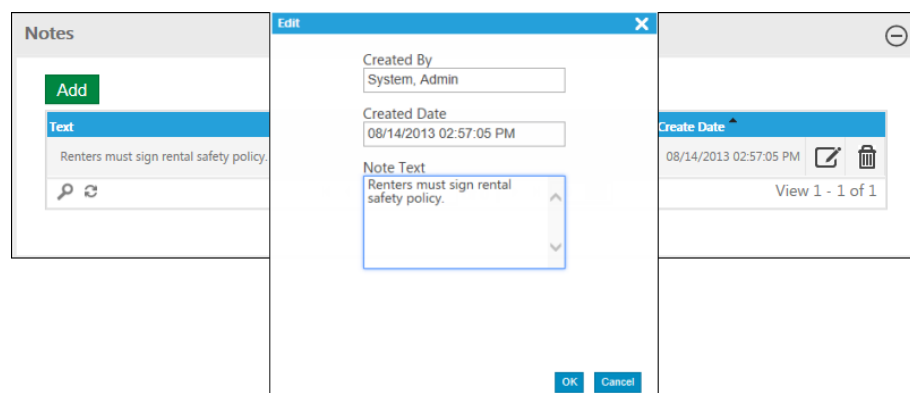
To make an add-on required, select the Required check box for the add-on item. In this case, the Required box on the Details page of the portal displays a default value of one (1) and the user cannot change this. If an add-on item or service is not required, the value of this box is zero (0).

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.

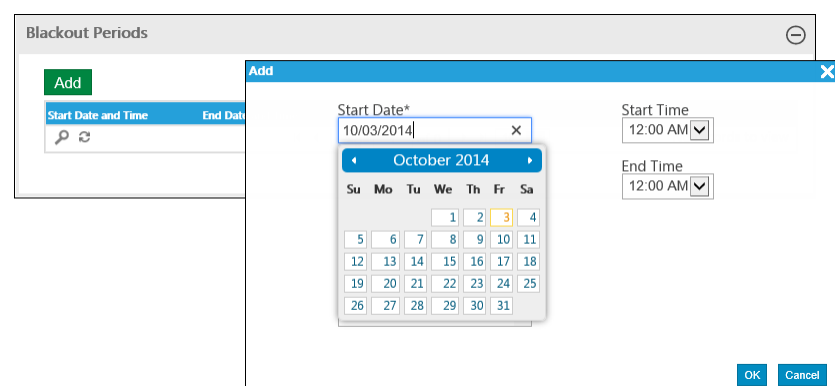
## Notes

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



## 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.



## 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 <span>⌵</span>	12:00 AM <span>⌵</span>
Monday	<input type="checkbox"/>	12:00 AM <span>⌵</span>	12:00 AM <span>⌵</span>
Tuesday	<input type="checkbox"/>	12:00 AM <span>⌵</span>	12:00 AM <span>⌵</span>
Wednesday	<input type="checkbox"/>	12:00 AM <span>⌵</span>	12:00 AM <span>⌵</span>
Thursday	<input type="checkbox"/>	12:00 AM <span>⌵</span>	12:00 AM <span>⌵</span>
Friday	<input type="checkbox"/>	12:00 AM <span>⌵</span>	12:00 AM <span>⌵</span>
Saturday	<input checked="" type="checkbox"/>	8:00 AM <span>⌵</span>	4:00 PM <span>⌵</span>

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 ⊖

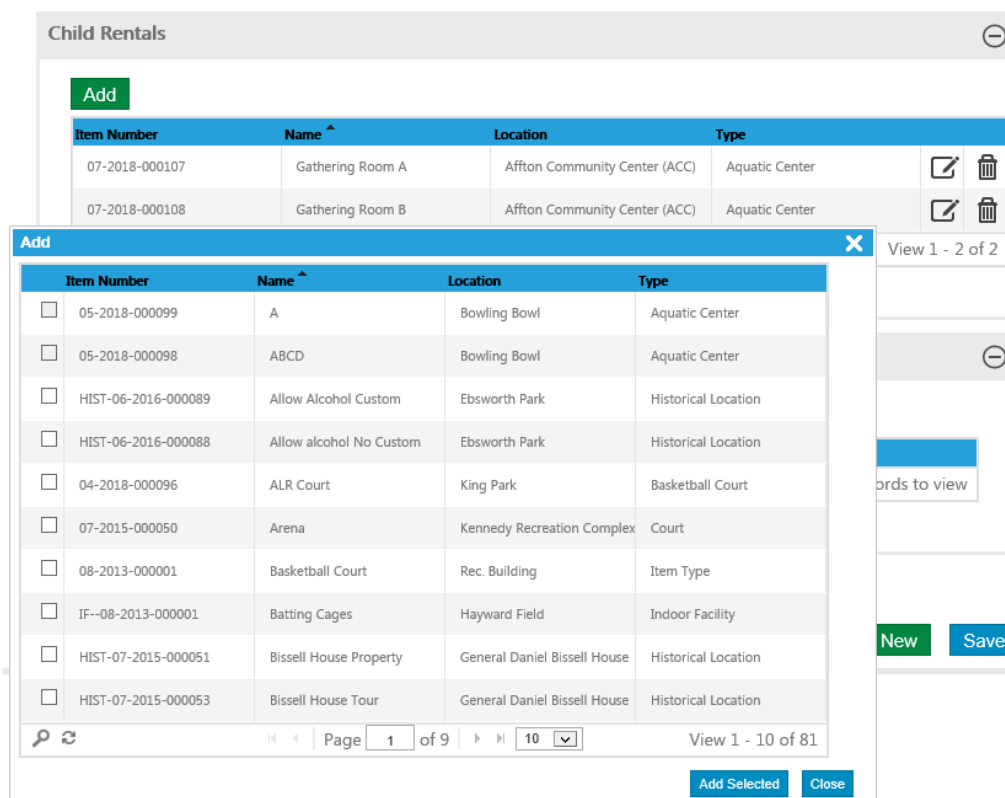
Add

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 a green 'Add' button. Below it is a table with columns: Item Number, Name, Location, and Type. Two rows are visible, both with edit and delete icons. Below this table is a larger 'Add' dialog box containing a table of 10 items, each with a checkbox in the first column. The table columns are Item Number, Name, Location, and Type. At the bottom of the 'Add' dialog are 'Add Selected' and 'Close' buttons. To the right of the 'Add' dialog, there are buttons for 'New' and 'Save'.

Item Number	Name	Location	Type
07-2018-000107	Gathering Room A	Afton Community Center (ACC)	Aquatic Center
07-2018-000108	Gathering Room B	Afton Community Center (ACC)	Aquatic Center

Item Number	Name	Location	Type
<input type="checkbox"/> 05-2018-000099	A	Bowling Bowl	Aquatic Center
<input type="checkbox"/> 05-2018-000098	ABCD	Bowling Bowl	Aquatic Center
<input type="checkbox"/> HIST-06-2016-000089	Allow Alcohol Custom	Ebsworth Park	Historical Location
<input type="checkbox"/> HIST-06-2016-000088	Allow alcohol No Custom	Ebsworth Park	Historical Location
<input type="checkbox"/> 04-2018-000096	ALR Court	King Park	Basketball Court
<input type="checkbox"/> 07-2015-000050	Arena	Kennedy Recreation Complex	Court
<input type="checkbox"/> 08-2013-000001	Basketball Court	Rec. Building	Item Type
<input type="checkbox"/> IF--08-2013-000001	Batting Cages	Hayward Field	Indoor Facility
<input type="checkbox"/> HIST-07-2015-000051	Bissell House Property	General Daniel Bissell House	Historical Location
<input type="checkbox"/> HIST-07-2015-000053	Bissell House Tour	General Daniel Bissell House	Historical Location

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 the 'Child Rentals' dialog box. The 'Add' button is highlighted with a red rectangle and is disabled (grayed out). Below the button is a table with columns: Item Number, Name, Location, and Type. The table is empty, and the status at the bottom right says 'No records to view'.

Item Number	Name	Location	Type
-------------	------	----------	------

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.

## Rental Item Calendar

[Parks & Rec](#) >> Rental Item >> Rental Item Calendar

Afton Community Center (ACC)

Print Calendar

Gathering Great Room

today < >

July 15 – 21 2018

month week day

	Sun 7/15	Mon 7/16	Tue 7/17	Wed 7/18	Thu 7/19	Fri 7/20	Sat 7/21
10am							
11am			11:00 - 12:00 Gathering Room A Gathering Great				
12pm							
1pm							
2pm							
3pm							
4pm							

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.

Discounts

Add

Name ^	Description	Type	Discount		
60 & Older	test	Age	\$1.00		
Boy Scouts	Boy Scouts	Custom	5.00%		
City of Tyler Employee	City of Tyler Employee	Employee	10.00%		

Page 1 of 1
10
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 ^

60 & Older

Boy Scouts

City of Tyler E

🔍

↺

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"/> Stefan Age	Stefan Age	Age	1.40%
<input type="checkbox"/> Employee	test	Employee	\$7.00
<input type="checkbox"/> Middle Age	Middle Age	Age	\$3.00
<input type="checkbox"/> Multi Family	Multi Family	Multi-Family	
<input type="checkbox"/> 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\*

60 & Older

Dollar Amount

1.00

Description

test

Percentage

Discount Type\*

Age

Start Date\*

5/22/2018

From Age

60

End Date

12/31/2018

To Age

☒ Available to Classes

☒ Available to Rentals

☒ Available to Memberships

☒ 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.

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Rental Item Calendar
[Parks & Rec >> Rental Item >> Rental Item Calendar](#)

Bartlett School
Gymnasium

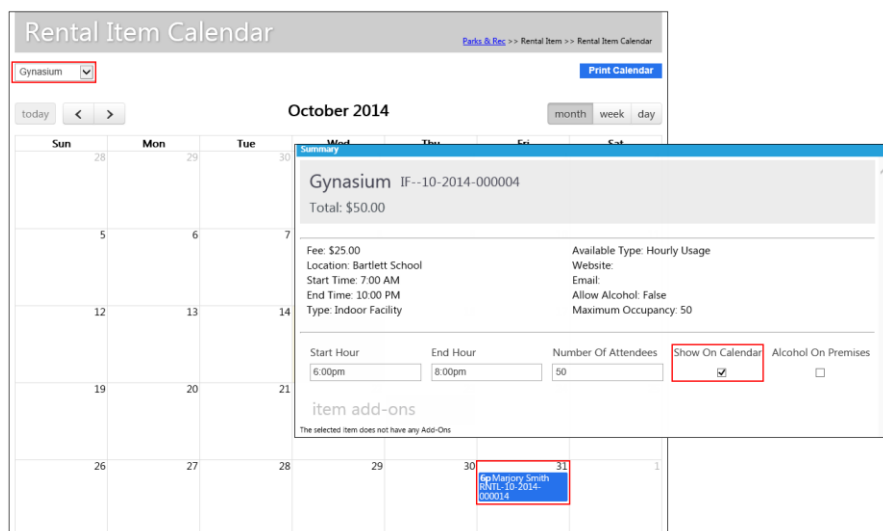
Print Calendar

today
<
>
October 2016
month
week
day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15

Jason Tyler  
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** month week day

Sun	Mon	Tue	Wed	Thu	Fri	Sat
28	29	30				
5	6	7				
12	13	14				
19	20	21				
26	27	28	29	30	31	1

**Summary**

**Gynasium IF--10-2014-000004**

Total: \$50.00

Fee: \$25.00  
Location: Bartlett School  
Start Time: 7:00 AM  
End Time: 10:00 PM  
Type: Indoor Facility

Available Type: Hourly Usage  
Website:  
Email:  
Allow Alcohol: False  
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

Rep: Majory Smith  
RNLT: 10-2014-000014

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.

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## Rental Item Calendar

[Parks & Rec](#) >> Rental Item >> Rental Item Calendar [Print Calendar](#)

Bartlett School ☐  
Ice Arena ☐

today < > **September 20 - 26 2015** month week day

	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							

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## Rental Registration Create

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

SELECT PAYER RENT ITEMS CONFIRM ORDER PAY INVOICE

Payer

[Next >](#) [Next >](#)

**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

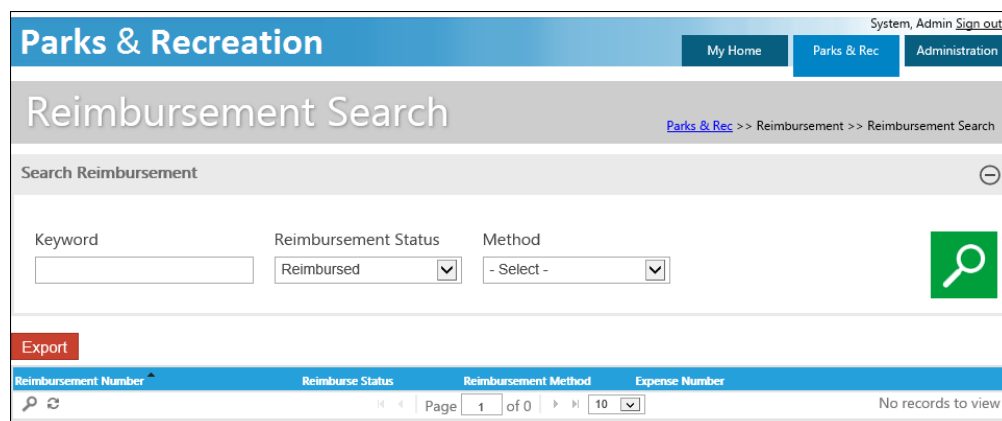
2:30pm 6:00pm 20 ☒ ☐

item add-ons

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

## Reimbursement

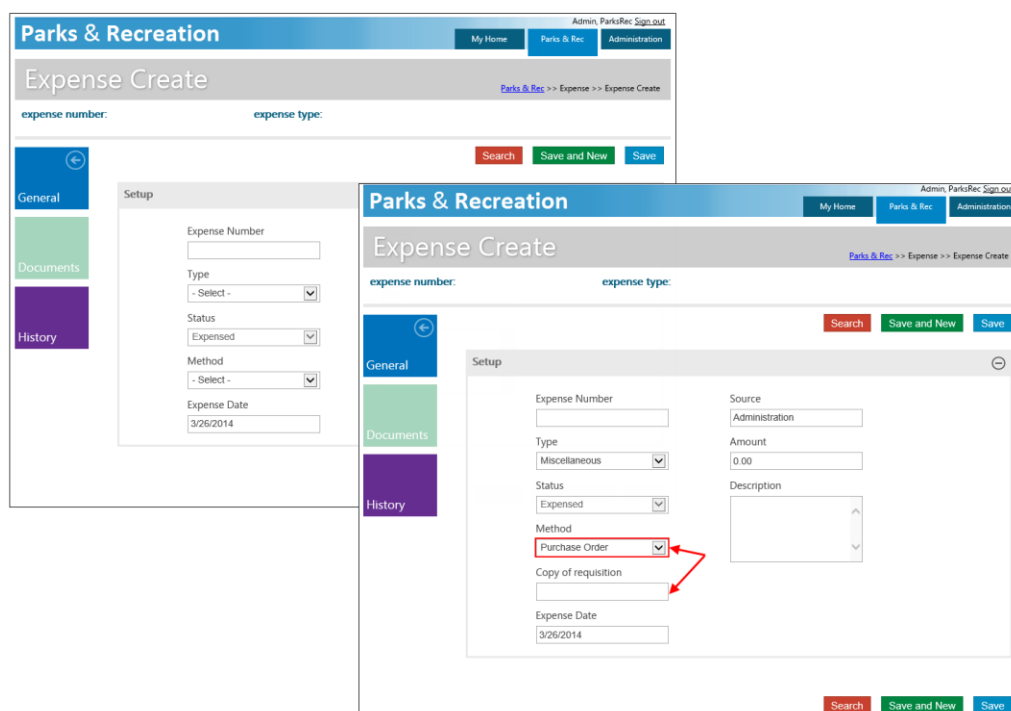
Reimbursement creates a list of records for fees that have been reimbursed. You can create the list by status or method. Once you have created the list, click **Export** to export the details to Microsoft Excel.



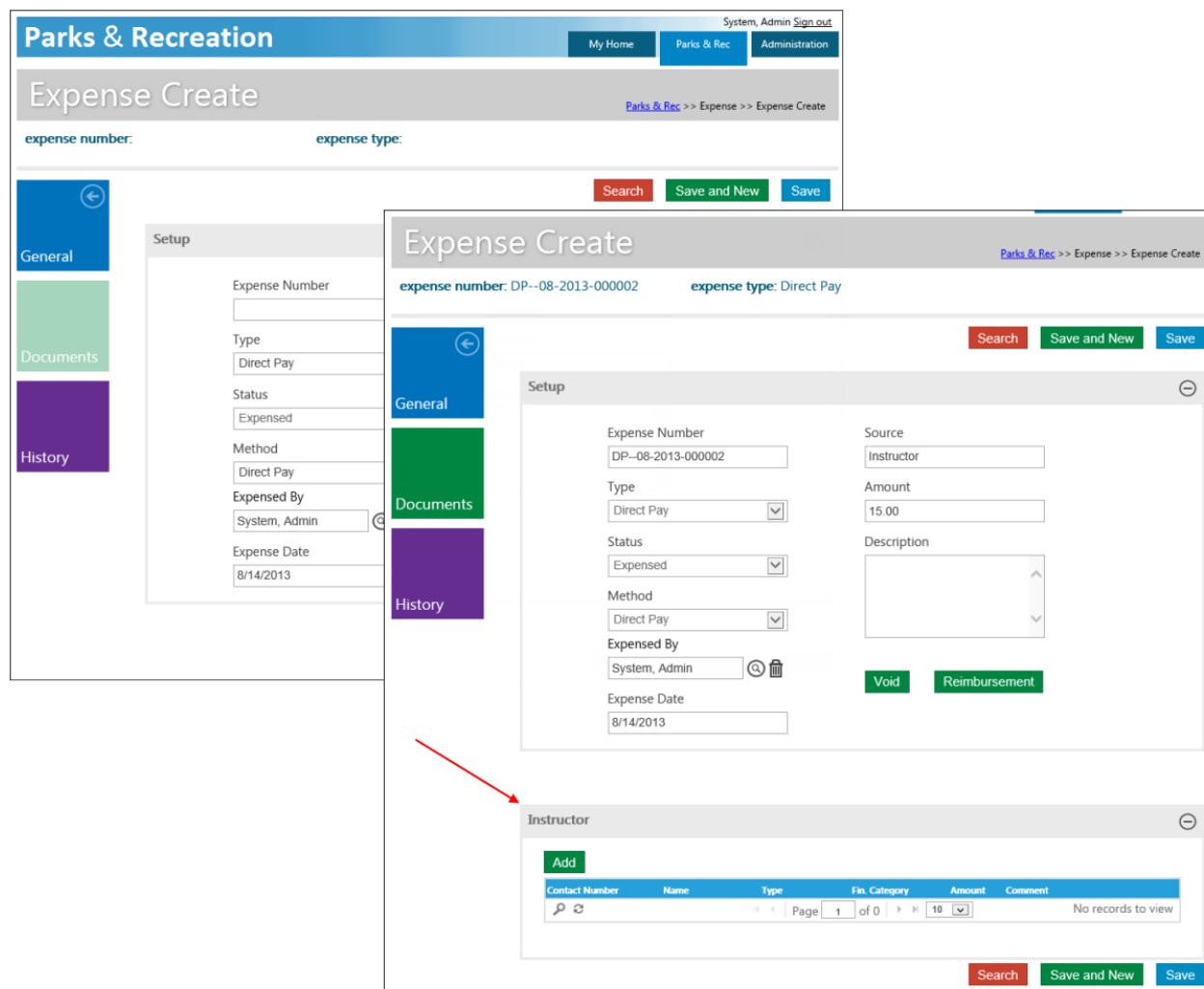
## Expense

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.



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.



**Parks & Recreation** System, Admin 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 Direct Pay

Status Expensed

Method Direct Pay

Expensed By System, Admin

Expense Date 8/14/2013

Expense Create

expense number: DP--08-2013-000002 expense type: Direct Pay

Search Save and New Save

General

Documents

History

Setup

Expense Number DP--08-2013-000002

Type Direct Pay

Status Expensed

Method Direct Pay

Expensed By System, Admin

Expense Date 8/14/2013

Source Instructor

Amount 15.00

Description

Void Reimbursement

Instructor

Add

Contact Number	Name	Type	Fin. Category	Amount	Comment
No records to view					

Page 1 of 0

Search Save and New Save

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.

Expense Source

Instructor

Amount

150.00

Reimbursement Status

Reimbursed

Recorded Date

1/6/2014

Reimbursement Method

Manual check

Reimburse Date

1/6/2014

Description

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.

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

CL--10-2014-000011

Type

Class

Associated Type

Class

Status

Expensed

Method

Cash

Receipt

1236

Expense Date

10/3/2014

Source

Administration

Amount

7.50

Description

Petty cash for ribbon.

Void

Class

Add

Class Number	Class Name	Class Type	Fin. Category	Amount	Comment
11-2013-000004	Running	Athletic - Indoor		7.50	

Page 1 of 0

10

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

Admin, ParksRec Sign out

My Home

Parks & Rec

Administration

Reimbursement Export

Parks & Rec >> Reimbursement >> Reimbursement Export

Search Reimbursements

Start Date

1/6/2014

End Date

1/6/2014

Minimum Amount

Maximum Amount

Reimbursement Number

Status

- Select -

Processed By

Payee Name

AP Export Status

All

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@documen

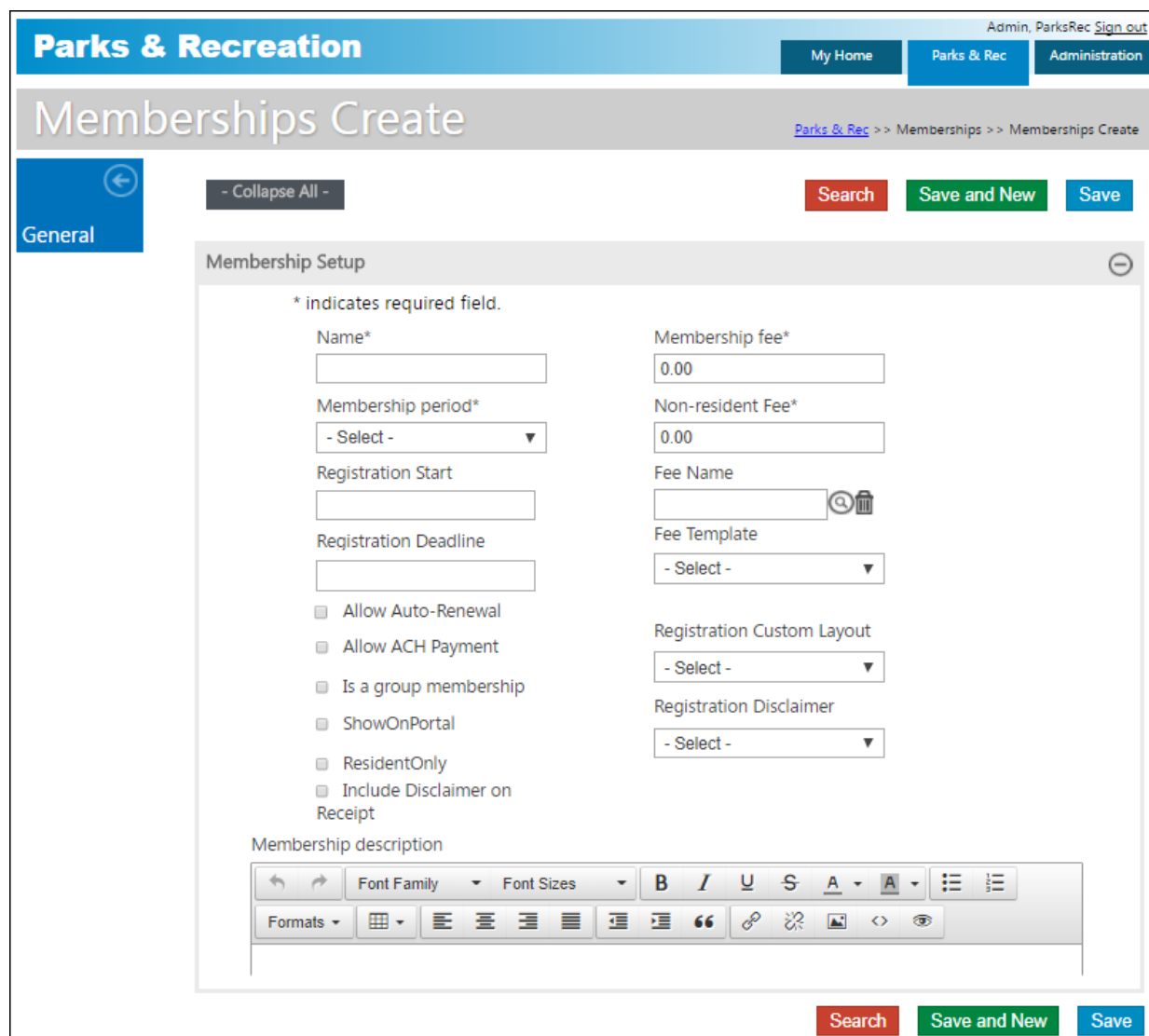
Page 1 of 1

10

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** Admin, ParksRec [Sign out](#)

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

# Memberships Create



[Parks & Rec](#) >> [Memberships](#) >> [Memberships Create](#)

[- Collapse All -](#) [Search](#) [Save and New](#) [Save](#)





**General**











### Membership Setup

\* indicates required field.

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


- Select - ▾

Access To  

- Select - ▾

Membership Period  

- 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 <div style="border: 1px solid #ccc; padding: 2px; font-size: x-small;">60 &amp; Older, Boy Scouts, Employee, Stefan Age</div>		30 Day Membership	false	 
Stefan Membership		\$100.00 / \$120.00	Unlimited	false	 
Stefans 2nd Membership		\$100.00 / \$110.00	Unlimited	false	 
TestNoOfDays	Discounts Available	\$30.00 / \$30.00	TestNumberOfDays	false	 
Winter membership	Discounts Available	\$15.00 / \$20.00	Winter 2018-2019	false	 



Page 

1

 of 1

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** Admin, ParksRec Sign out  
 My Home **Parks & Rec** Administration

## Memberships Details

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

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

**General**

**Membership Setup**

\* indicates required field.

Name\*  Membership fee\*

Membership period\*  Non-resident Fee\*

Receipt

**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							

Page 1 of 0

**Membership Members**

Member name	Group name	Start Date	Expiration date
No records to view			

[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	<a href="#">Edit</a>	<a href="#">Delete</a>
Martin, Marian	Not Yet Implemented	05/03/2018	05/02/2019	<a href="#">Edit</a>	<a href="#">Delete</a>
Smith, Martin	Not Yet Implemented	05/03/2018	05/02/2019	<a href="#">Edit</a>	<a href="#">Delete</a>
Sullivan, Nancy	Not Yet Implemented	05/03/2018	05/02/2019	<a href="#">Edit</a>	<a href="#">Delete</a>
Tyler, Jason	Not Yet Implemented	05/03/2018	05/02/2019	<a href="#">Edit</a>	<a href="#">Delete</a>
Young, Charles	Not Yet Implemented	05/03/2018	05/02/2019	<a href="#">Edit</a>	<a href="#">Delete</a>











Page 1 of 0 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.

Discounts					
<div>Add</div>					
Name ^	Description	Type	Discount		
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%		
<div>   Page 1 of 1 10 View 1 - 4 of 4 </div>					

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

Discounts					
<div>Add</div>					
Name ^	Description	Type	Discount		
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%		
<div>   Page 1 of 1 10 View 1 - 4 of 4 </div>					

Add					
<input type="checkbox"/>	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"/>	City of Tyler Employee	City of Tyler Employee	Employee	10.00%	
<input type="checkbox"/>	Middle Age	Middle Age	Age	\$3.00	
<input type="checkbox"/>	Multi Family	Multi Family	Multi-Family		
<input type="checkbox"/>	AAA	AAA Membership	Custom	5.00%	
<div>   Page 1 of 1 10 View 1 - 6 of 6 </div>					
				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"/>
	End Date
	<input type="text" value="5/31/2018"/>
<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

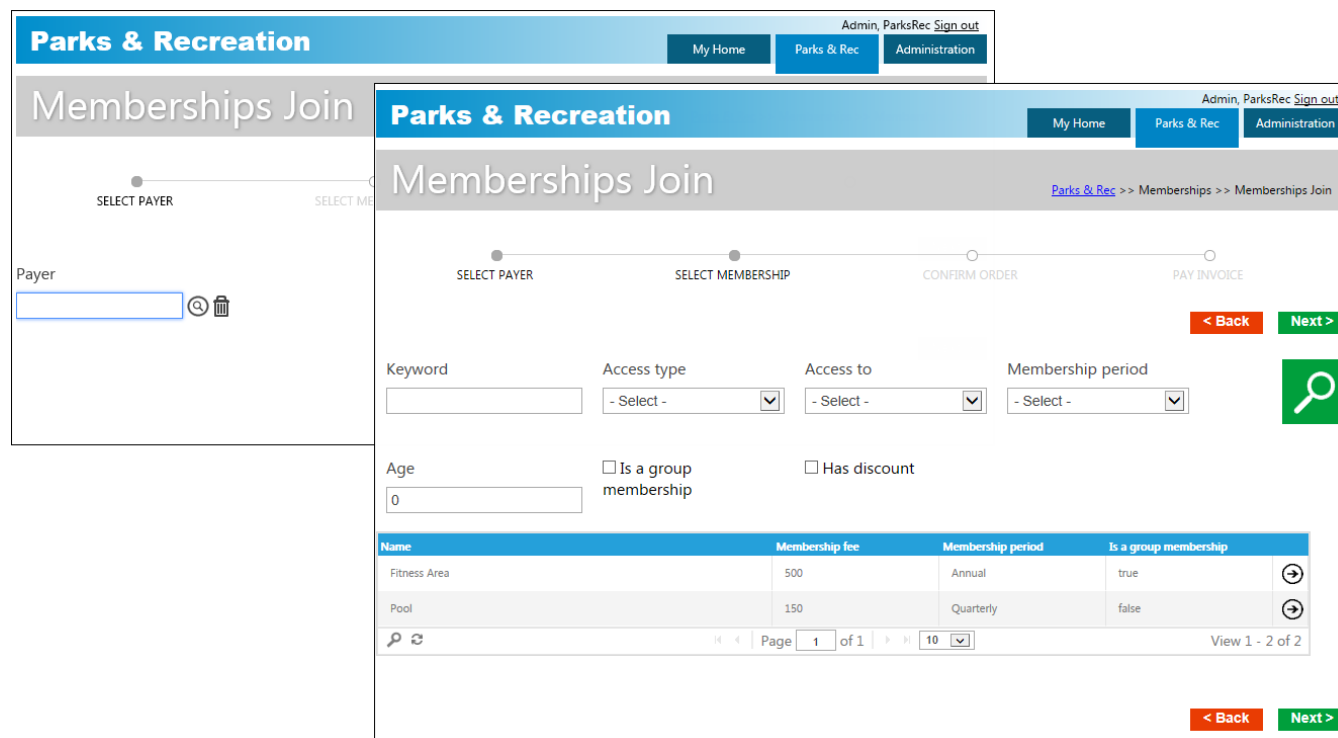
Privilege Setup

\* 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.



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

### Memberships Join

SELECT PAYER SELECT MEMBERSHIP CONFIRM ORDER PAY INVOICE

Payer  
[Input Field]

Keyword [Input Field] Access type [- Select -] Access to [- Select -] Membership period [- Select -]

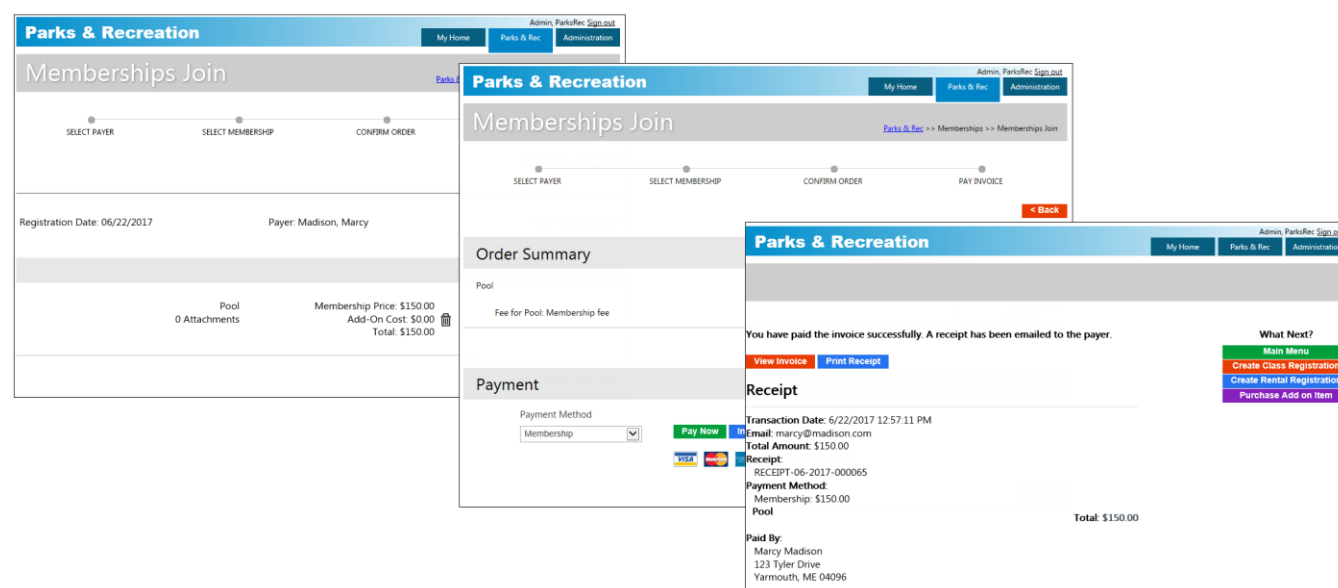
Age [Input Field] ☐ Is a group membership ☐ Has discount

Name	Membership fee	Membership period	Is a group membership
Fitness Area	500	Annual	true
Pool	150	Quarterly	false

Page 1 of 1 10 View 1 - 2 of 2

< Back Next >

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.



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

### Memberships Join

SELECT PAYER SELECT MEMBERSHIP CONFIRM ORDER PAY INVOICE

Registration Date: 06/22/2017 Payer: Madison, Marcy

Pool Membership Price: \$150.00  
Add-On Cost: \$0.00  
Total: \$150.00

### Order Summary

Pool  
Fee for Pool: Membership fee

### Payment

Payment Method: Membership  
Pay Now

### Receipt

Transaction Date: 6/22/2017 12:57:11 PM  
Email: marcy@madison.com  
Total Amount: \$150.00  
Receipt: RECEIPT-06-2017-000065  
Payment Method: Membership  
Pool  
Total: \$150.00

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

View Invoice Print Receipt

What Next?  
Main Menu  
Create Class Registration  
Create Rental Registration  
Purchase Add on Item

**Sign In**

For completed memberships, use the [Sign In](#) page to review the details.

Admin, ParksRec

Sign out

My Home

Parks & Rec

Administration

# Parks & Recreation

## Memberships Sign In

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

SELECT PRIVILEGE

SCAN CARD

Next >

Keyword

Access type

Access to

Membership period

- Select -

- Select -

- 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
🔍 ↺				Page 1 of 0	10			No records to view

🔍



# Administration

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

**Parks & Recreation**

[System](#), [ParksRec](#) [Sign out](#)

[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.

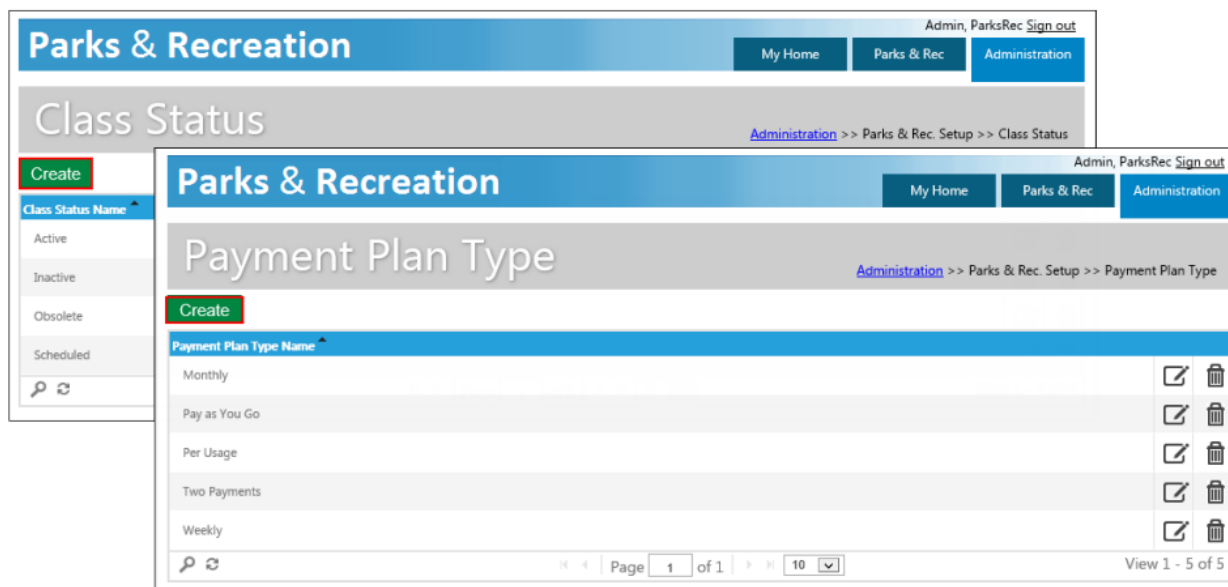
## Report Setup

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 overlapping screenshots of the Tyler Parks & Recreation setup interface. The top screenshot shows the 'Class Status' page with a 'Create' button highlighted in red. The bottom screenshot shows the 'Payment Plan Type' page with a 'Create' button highlighted in red. Both pages have a navigation bar with 'My Home', 'Parks & Rec', and 'Administration' links. The 'Payment Plan Type' page displays a table with the following records:

Payment Plan Type Name		
Monthly		
Pay as You Go		
Per Usage		
Two Payments		
Weekly		

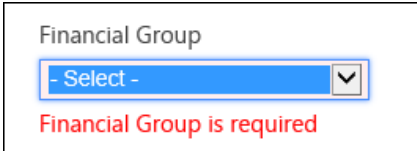
The bottom of the 'Payment Plan Type' page shows a pagination bar with 'Page 1 of 1' and a 'View 1 - 5 of 5' indicator.

## 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.

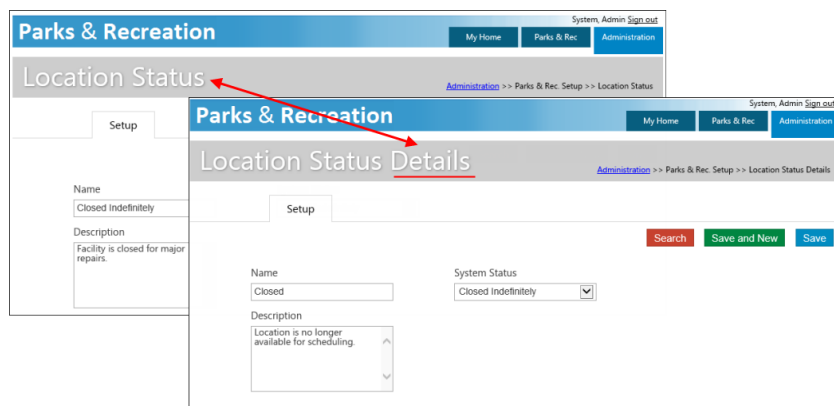
Throughout the setup pages, the Name boxes typically allow up to 20 characters of text.

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.



The screenshot shows a 'Financial Group' dropdown menu with the text '- Select -' and a downward arrow. Below the dropdown, the text 'Financial Group is required' is displayed in red.

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.

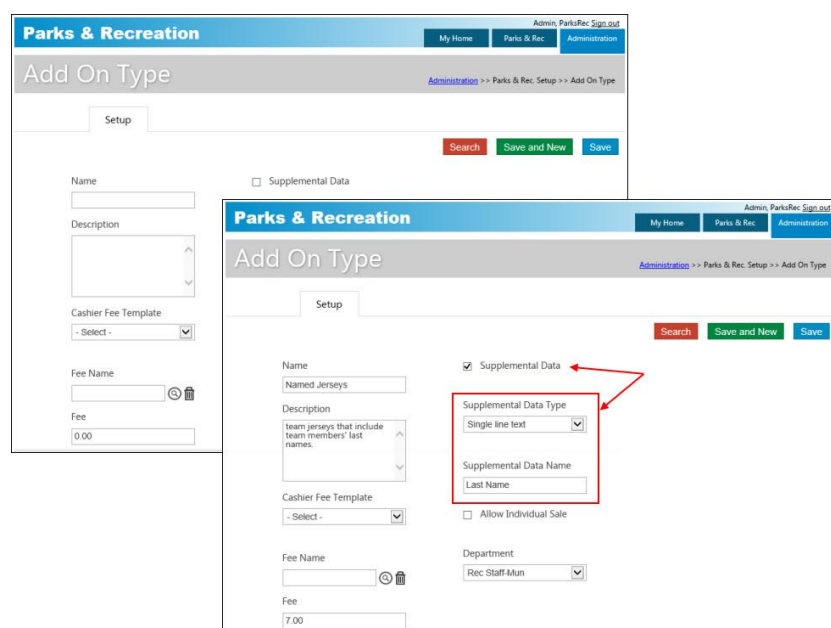


Several detail screens include the System Status list. This status is recognized by the Parks and Recreation application for processing. However, you can create user-defined variations for a status that provides additional details. For example, if the system status for an instructor is Inactive, you 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.

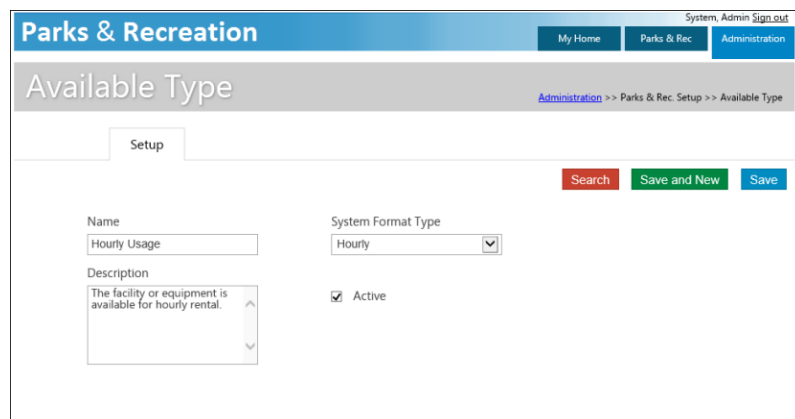
If you select the Supplemental Data check box, you must complete the Supplemental Data Type list and the Supplemental Data Name box.



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.



**Parks & Recreation** System, Admin Sign out  
My Home Parks & Rec Administration

**Available Type** Administration >> Parks & Rec. Setup >> Available Type

Setup

Search Save and New Save

Name: Hourly Usage

System Format Type: Hourly

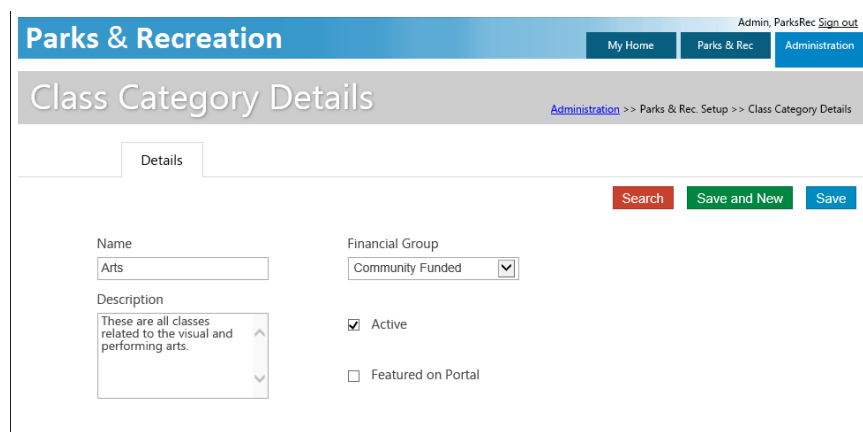
Description: The facility or equipment is available for hourly rental.

☒ Active

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.



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

**Class Category Details** Administration >> Parks & Rec. Setup >> Class Category Details

Details

Search Save and New Save

Name: Arts

Financial Group: Community Funded

Description: These are all classes related to the visual and performing arts.

☒ Active

☐ Featured on Portal

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.

System, Admin Sign out

Parks & Recreation

My HomeParks & RecAdministration

Class Group

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

Setup

SearchSave and NewSave

Name

Beginners

☒ Active

Description

This group is comprised of individuals who have no experience in the activity area.

## Class Status

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

System, Admin Sign out

Parks & Recreation

My HomeParks & RecAdministration

Class Status

Administration >> Parks & Rec. Setup >> Class Status

Setup

SearchSave and NewSave

Name

Scheduled

Description

The class is scheduled pending the number of participants who sign up.

System Status

Open

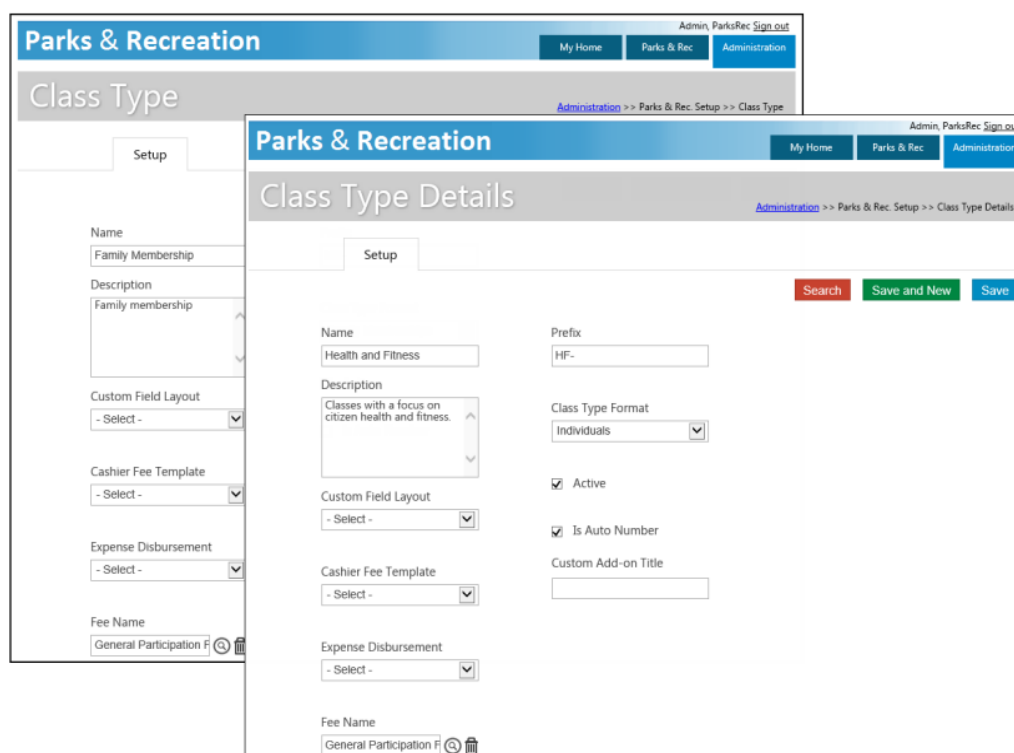
The System Status list options are not available for update.

## 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 registered 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.



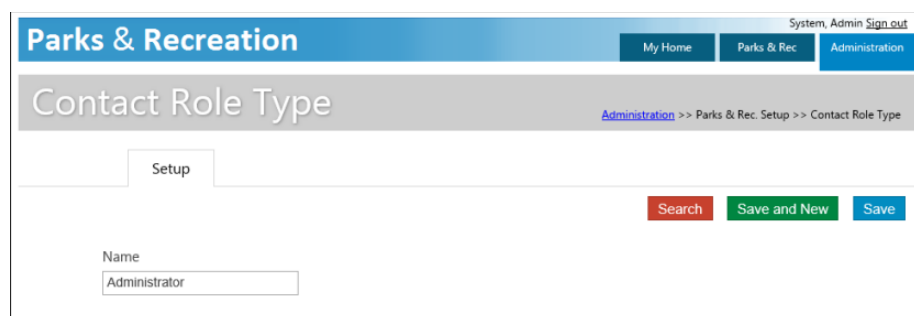
If you select a value for the Custom Field Layout list, the program assigns the custom layout to all classes to which this class type is assigned.

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 inactivate the type by clearing the Active check box on the Class Type record. In this case, once the class is inactivated, the class type cannot be assigned to new classes, but it continues to display on any existing classes to which it is assigned.

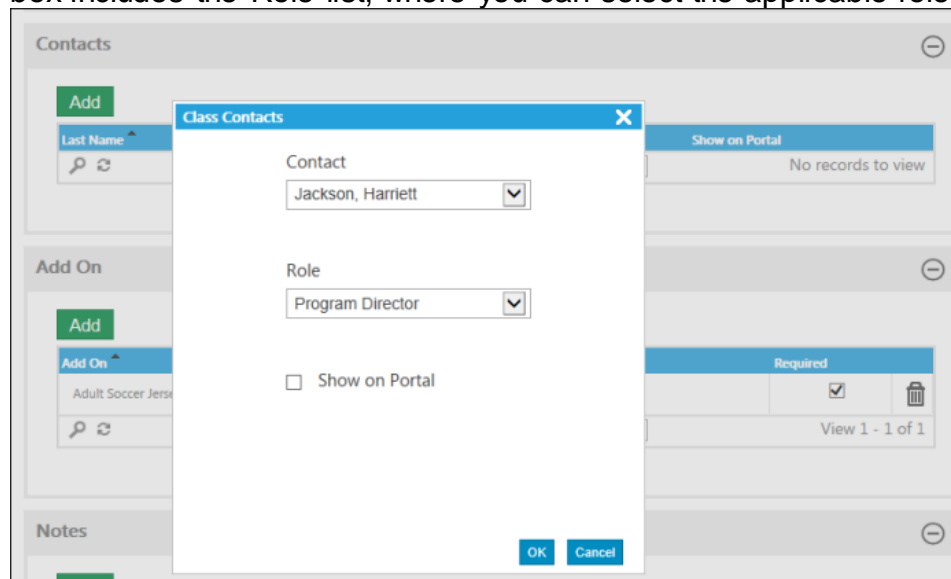
The Custom Add-on Title field defines a custom name for the Add On group that displays on the Class Details page for any class associated with the class type. The custom name also displays on the Summary page for administrative or portal registrations. If you do not define a custom name for an add-on,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

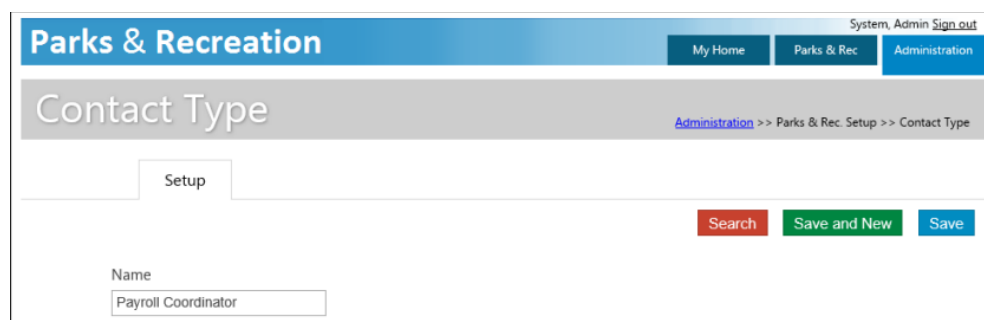


When you assign contacts to a class or activity and you click **Add**, the Class Contacts dialog box includes the Role list, where you can select the applicable role for the contact.



## Contact Type

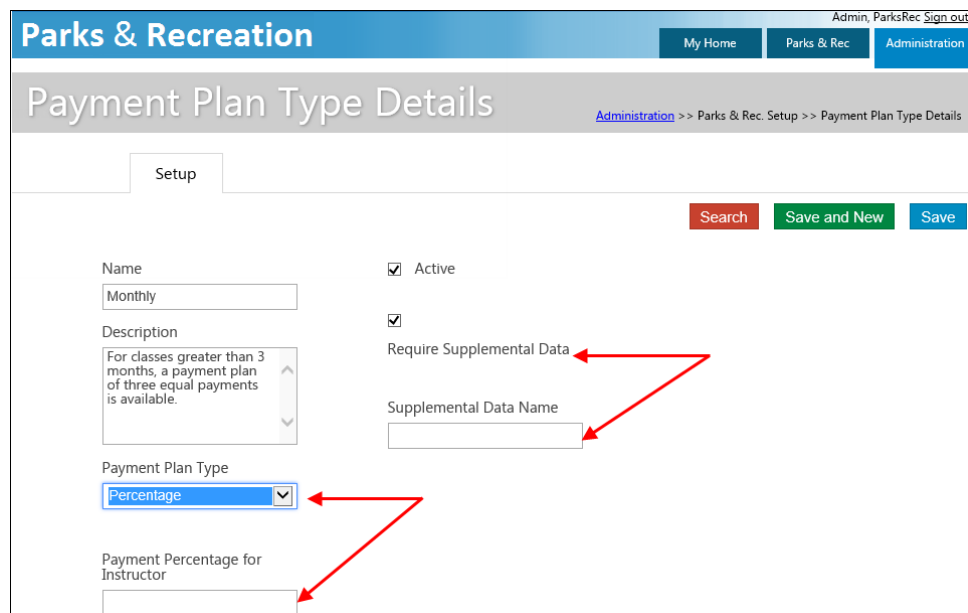
Contact Types maintains contact types for your organization. You cannot delete a contact type that is assigned to an active contact record. Once you have created contact type records, you can assign the types to contact records.



## 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.



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

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

### Payment Plan Type Details

[Administration](#) >> [Parks & Rec. Setup](#) >> [Payment Plan Type Details](#)

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

**Setup**

Name:

Description:

Payment Plan Type:

Payment Percentage for Instructor:

☒ Active

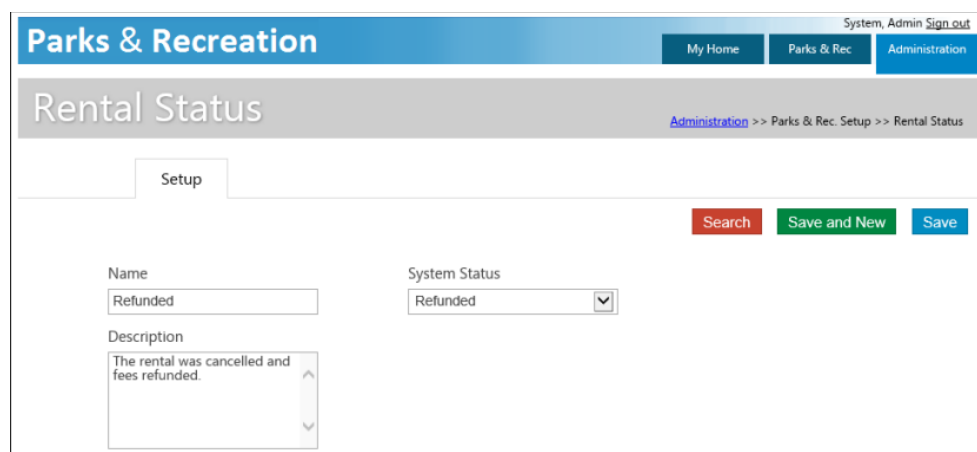
☒ Require Supplemental Data

Supplemental Data Name:

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.



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

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

### Rental Status

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

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

**Setup**

Name:

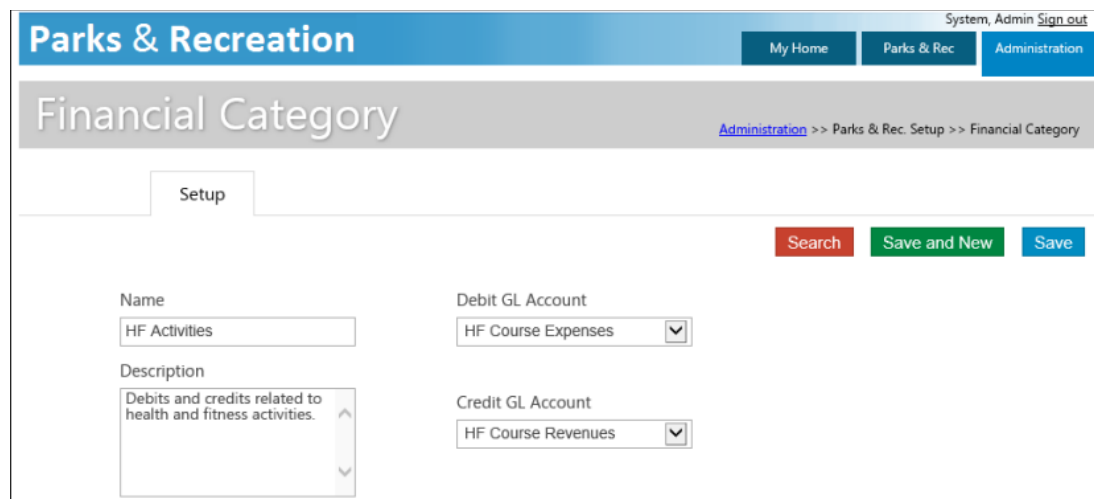
System Status:

Description:

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.

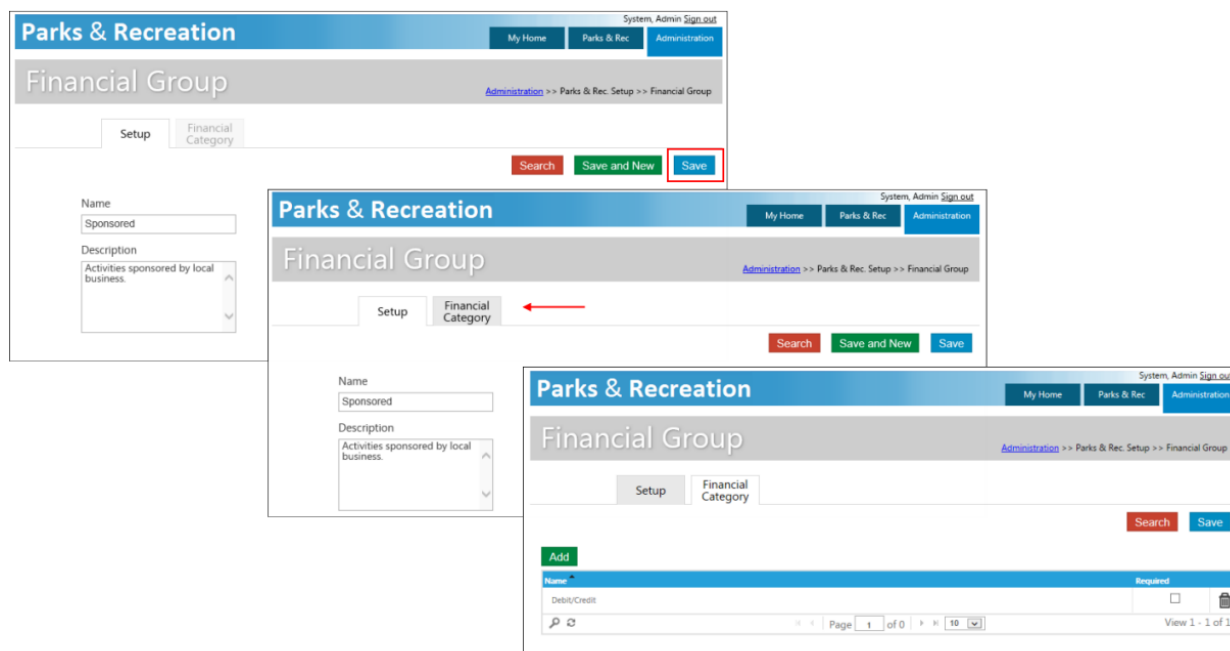


The screenshot shows the 'Financial Category' setup screen. The header includes 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. The breadcrumb trail is 'Administration >> Parks & Rec. Setup >> Financial Category'. The 'Setup' tab is active. There are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form contains the following fields:

- Name:** HF Activities
- Description:** Debits and credits related to health and fitness activities.
- Debit GL Account:** HF Course Expenses (dropdown menu)
- Credit GL Account:** HF Course Revenues (dropdown menu)

## Financial Group

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



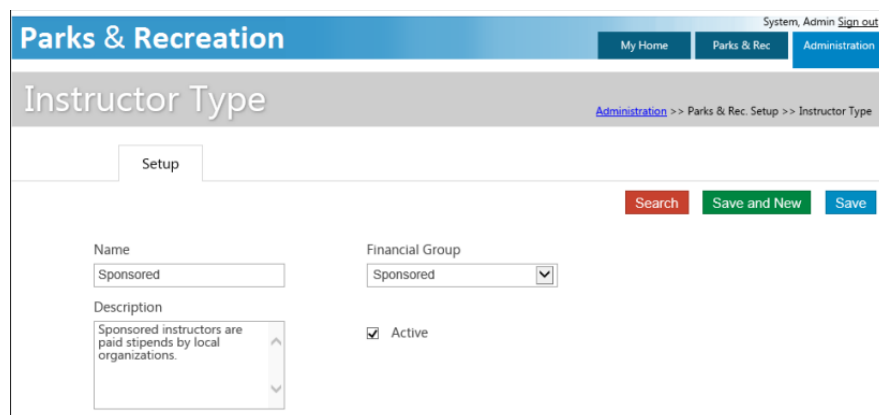
The image shows three overlapping screenshots of the 'Financial Group' setup screen. The top-left screenshot shows the 'Setup' tab with fields for 'Name' (Sponsored) and 'Description' (Activities sponsored by local business). The top-right screenshot shows the 'Financial Category' tab, which is highlighted with a red box and a red arrow pointing to it from the 'Financial Category' tab in the middle screenshot. The bottom screenshot shows the 'Financial Group' screen with the 'Add' button highlighted in green. Below the 'Add' button is a table with the following data:

Name	Sponsored
Debit/Credit	

The table has a pagination bar at the bottom showing 'Page 1 of 1' and 'View 1 - 1 of 1'.

## Instructor Type

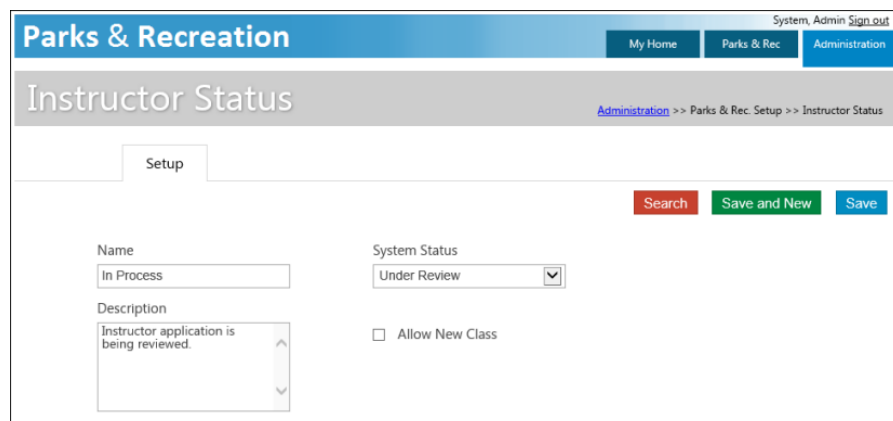
Instructor Type specifies types for your program instructors, including associated financial group details for each type.



The screenshot shows the 'Instructor Type' setup page in the 'Parks & Recreation' system. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. A breadcrumb trail indicates the path: 'Administration >> Parks & Rec. Setup >> Instructor Type'. The 'Setup' tab is active. The form includes a 'Name' field with the value 'Sponsored', a 'Financial Group' dropdown menu also set to 'Sponsored', and a 'Description' text area containing 'Sponsored instructors are paid stipends by local organizations.' There is a checked 'Active' checkbox. At the top right of the form area are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue).

## Instructor Status

Instructor Status identifies status codes for program instructors.

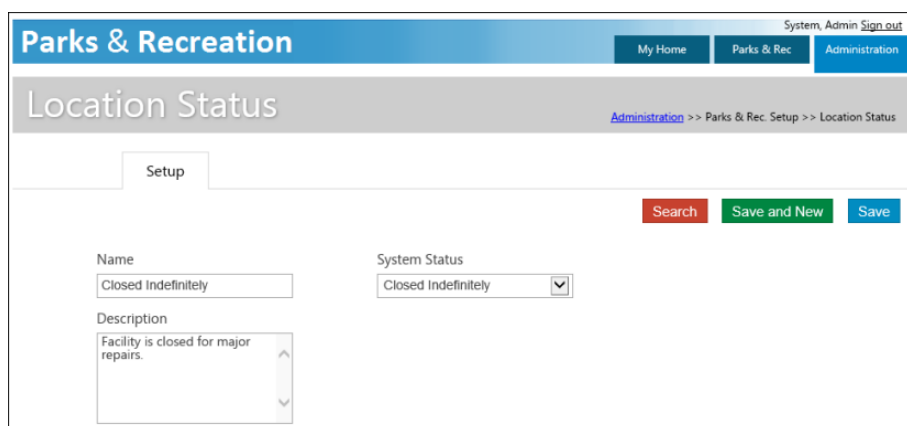


The screenshot shows the 'Instructor Status' setup page in the 'Parks & Recreation' system. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. A breadcrumb trail indicates the path: 'Administration >> Parks & Rec. Setup >> Instructor Status'. The 'Setup' tab is active. The form includes a 'Name' field with the value 'In Process', a 'System Status' dropdown menu set to 'Under Review', and a 'Description' text area containing 'Instructor application is being reviewed.' There is an unchecked 'Allow New Class' checkbox. At the top right of the form area are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue).

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

## Location Status

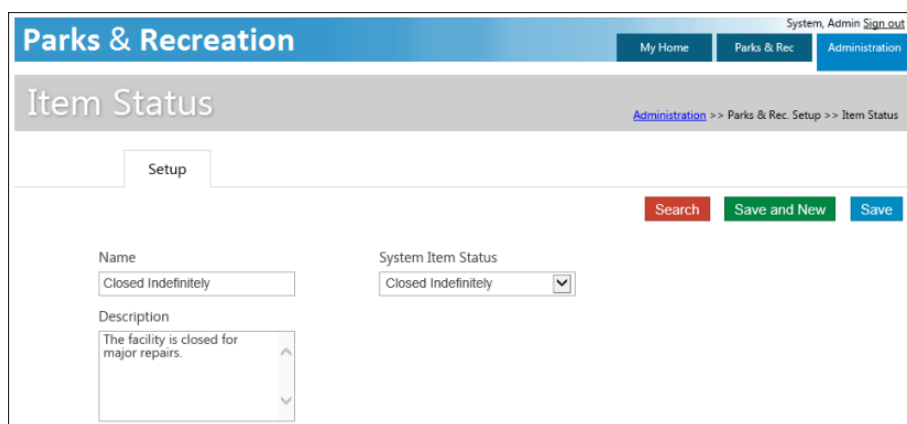
Location Status identifies the status of locations where programs are offered.



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).



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** System, Admin [Sign out](#)

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

## Location Type

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

**Setup**

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

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

## 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** Admin, ParksRec [Sign out](#)

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

## Item Type Details

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

**Setup**

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

Name  
Arena

Prefix  
AR-

Description  
Ice arena

☒ Active

Custom Add-on Title

Custom Field Layout  
Layout

## 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**

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

Name  
Rental Hold Harmies

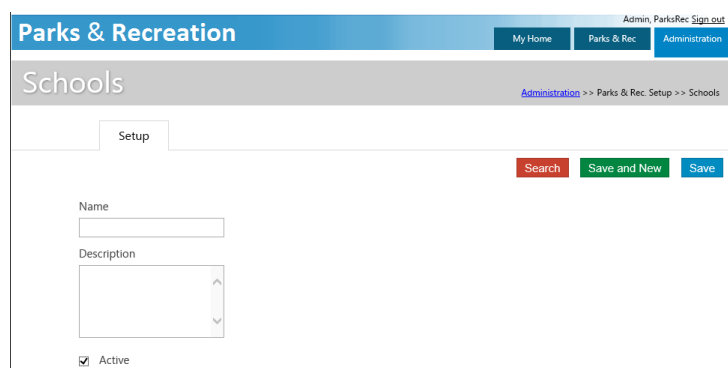
☒ Active

[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.

## Schools

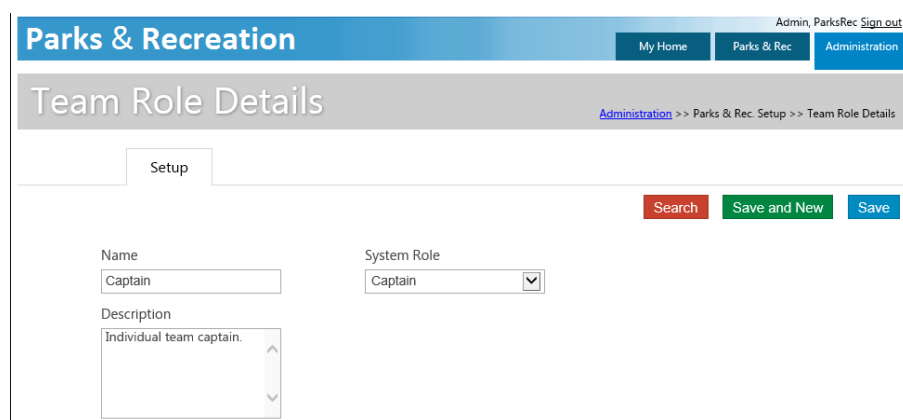
Schools maintains records for schools that can be associated with your organization's programs.



The screenshot shows the 'Schools' setup page in the Tyler Parks & Recreation system. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. Below the header, there's a breadcrumb trail: 'Administration >> Parks & Rec. Setup >> Schools'. The main content area has a 'Setup' tab selected. There are three buttons at the top right: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form includes a 'Name' text field, a 'Description' text area, and an 'Active' checkbox which is checked.

## Team Role

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



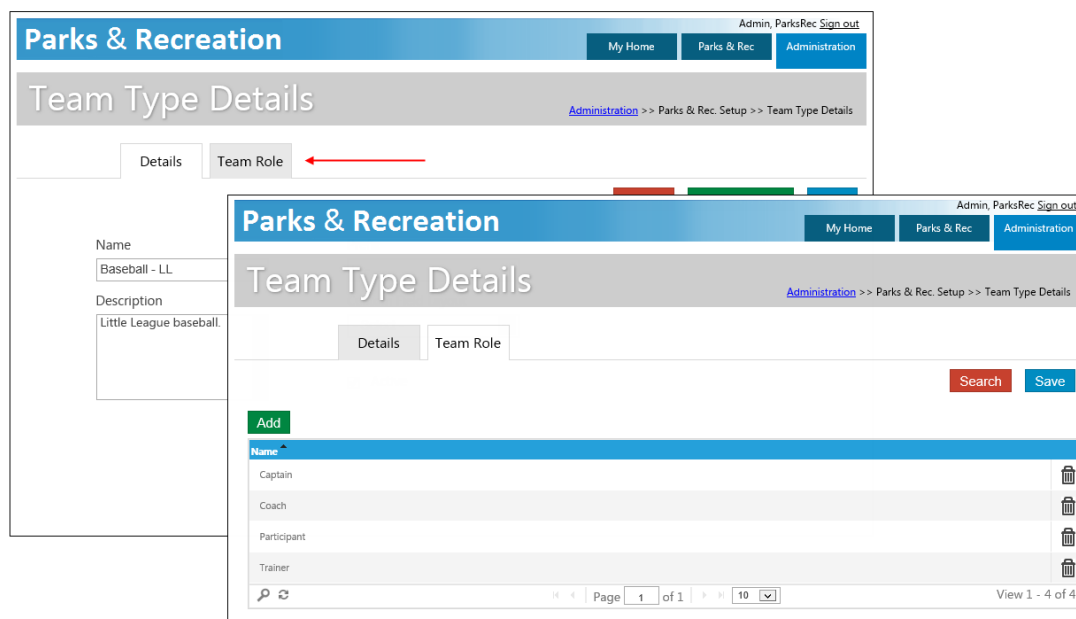
The screenshot shows the 'Team Role Details' setup page. The header and navigation are the same as the previous page. The breadcrumb trail is 'Administration >> Parks & Rec. Setup >> Team Role Details'. The 'Setup' tab is selected. There are three buttons at the top right: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form includes a 'Name' text field with 'Captain' entered, a 'System Role' dropdown menu with 'Captain' selected, and a 'Description' text area with 'Individual team captain.' entered.

## 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.

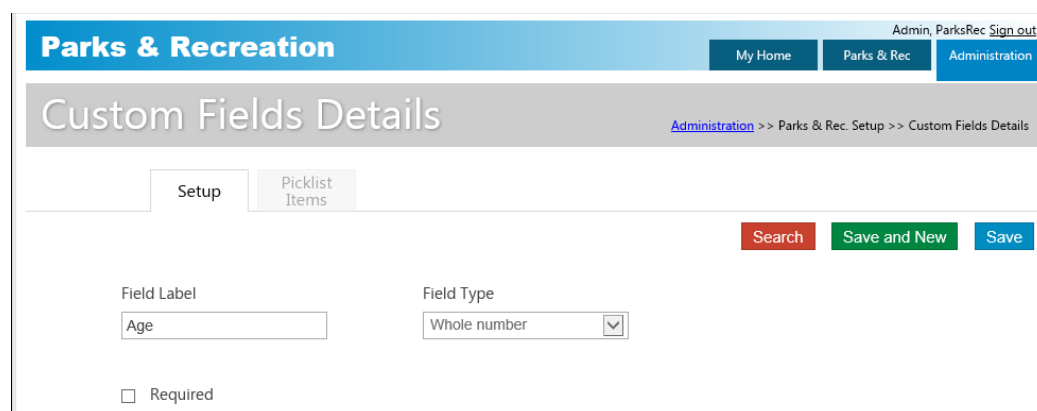
For each team type, the Captain role must be defined. If a team type does not have a defined captain role, you are not allowed to create a team record based on the team type.





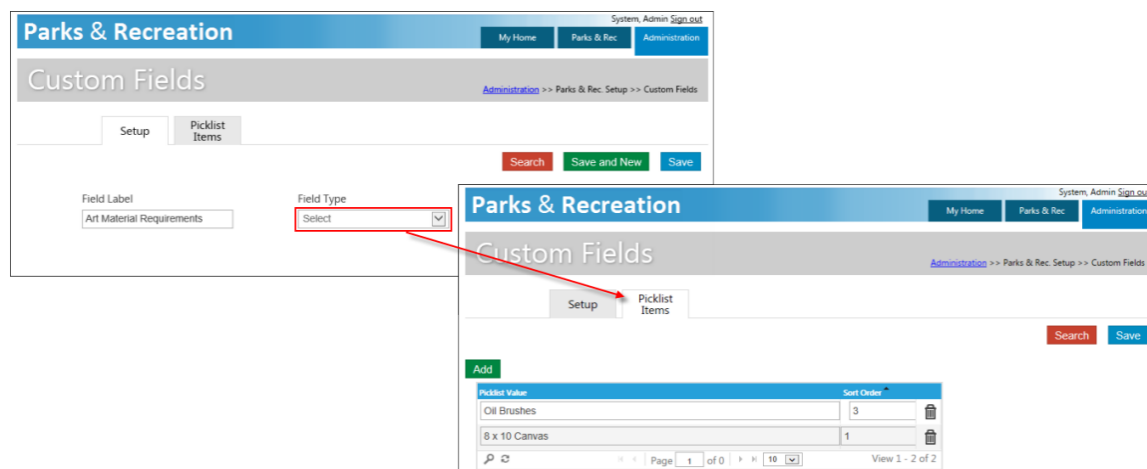
## Custom Fields

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



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.



**Parks & Recreation** Custom Fields

Field Label: Art Material Requirements

Field Type: **Select**

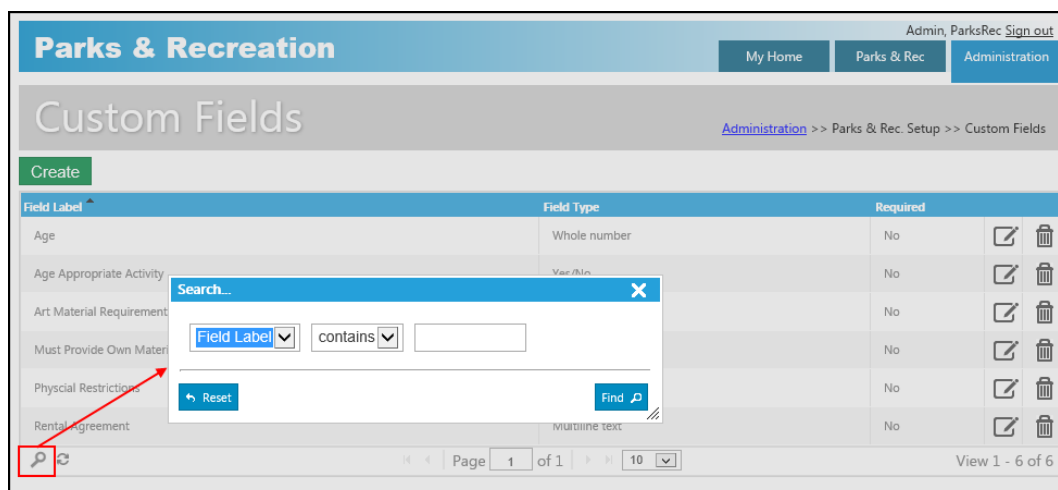
**Picklist Items**

Picklist Value	Sort Order
Oil Brushes	3
8 x 10 Canvas	1

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.



**Parks & Recreation** Custom Fields

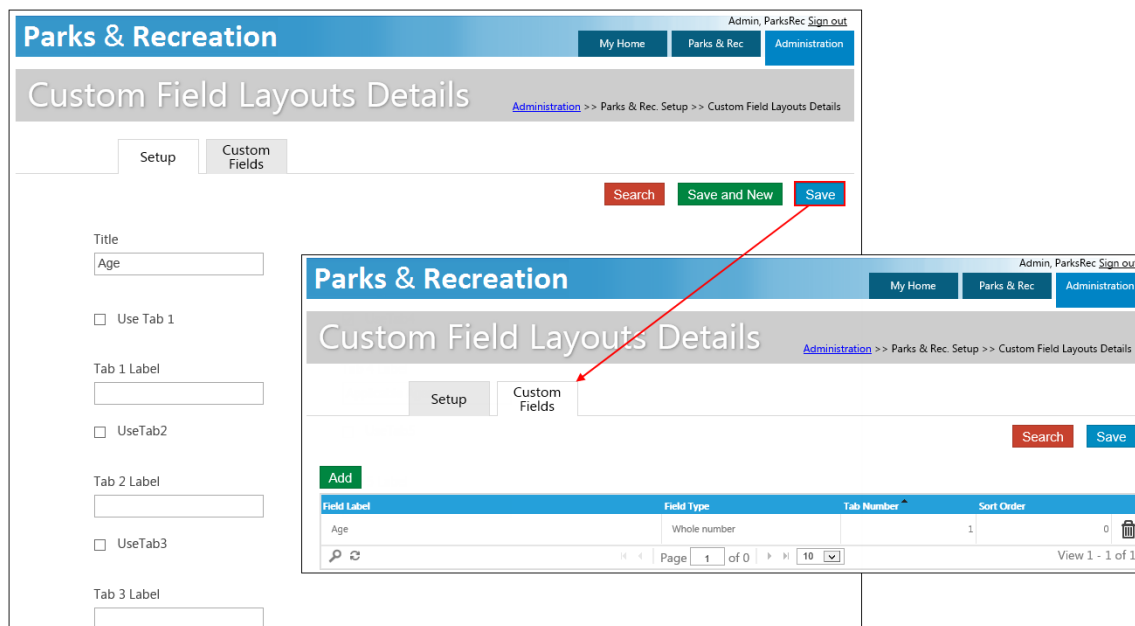
Create

Field Label	Field Type	Required
Age	Whole number	No
Age Appropriate Activity	Var (Min)	No
Art Material Requirement		No
Must Provide Own Material		No
Physical Restrictions		No
Rental Agreement	multiline text	No

Search...  
Field Label contains [ ]  
Reset Find

## Custom Field Layouts

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



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

## Custom Field Layouts Details

Administration >> Parks & Rec. Setup >> Custom Field Layouts Details

Setup Custom Fields

Search Save and New Save

Title  
Age

☐ Use Tab 1

Tab 1 Label

☐ UseTab2

Tab 2 Label

☐ UseTab3

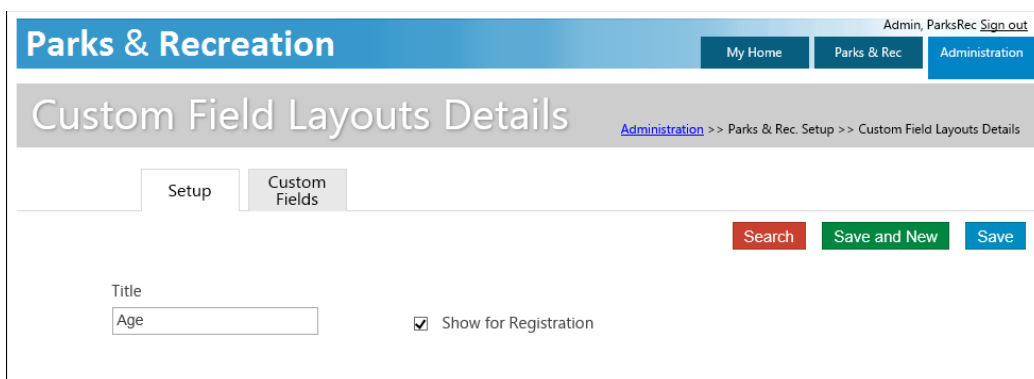
Tab 3 Label

**Add**

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

Page 1 of 0 10 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** Admin, ParksRec Sign out  
My Home Parks & Rec Administration

## Custom Field Layouts Details

Administration >> Parks & Rec. Setup >> Custom Field Layouts Details

Setup Custom Fields

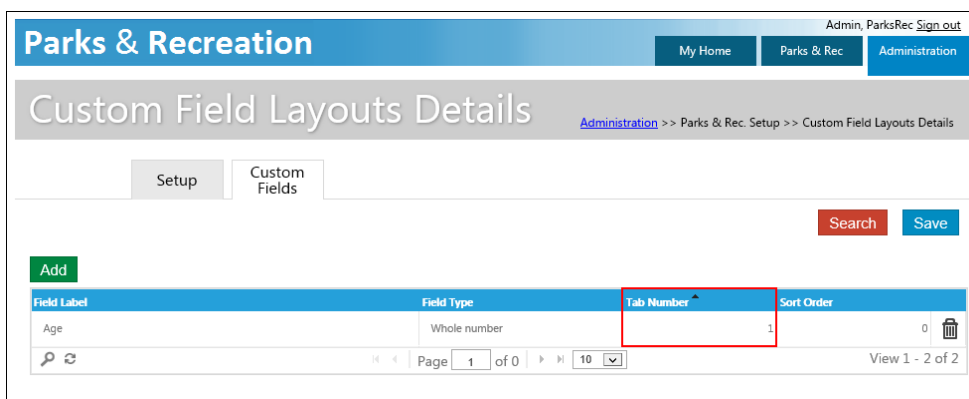
Search Save and New Save

Title  
Age

☒ Show for Registration

**Add**

In this case, when you display the Custom Fields tab, the Tab Number field always displays Tab 1.



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

## Custom Field Layouts Details

Administration >> Parks & Rec. Setup >> Custom Field Layouts Details

Setup Custom Fields

Search Save

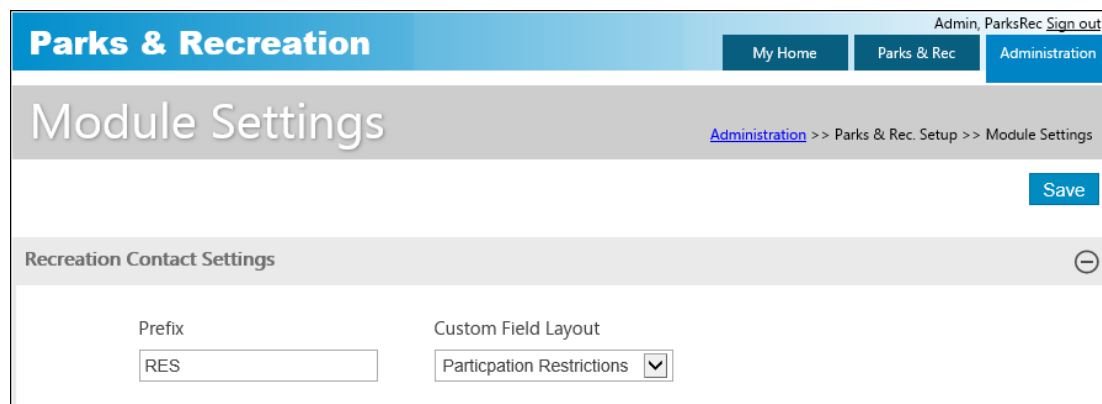
**Add**

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

Page 1 of 0 10 View 1 - 2 of 2

## Module Settings

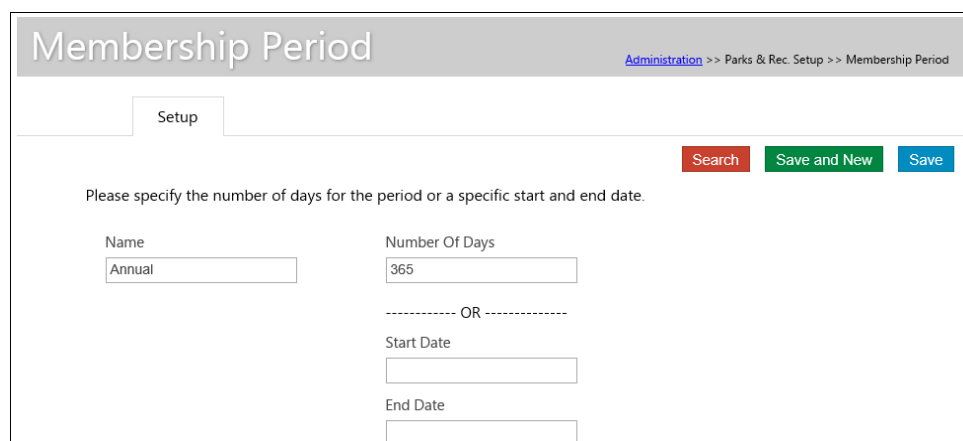
Module Settings defines a prefix for recreation contact numbers.



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.

**Parks & Recreation** Admin ParksRec Sign out

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

## Restrictions

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

[Details](#) [Settings](#)

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

Name  
No registration

Description  
Restricted from class registration.

[Details](#) [Settings](#)

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

Restrict	
Class registration	<input checked="" type="checkbox"/>
Facility rentals	<input type="checkbox"/>
Instructing classes	<input type="checkbox"/>
Cash payment	<input type="checkbox"/>
Check payment	<input type="checkbox"/>
Credit card payment	<input type="checkbox"/>
Money order payment	<input type="checkbox"/>
MyGovPay payment	<input type="checkbox"/>
Other payment	<input type="checkbox"/>

10 View 1 - 9 of 9

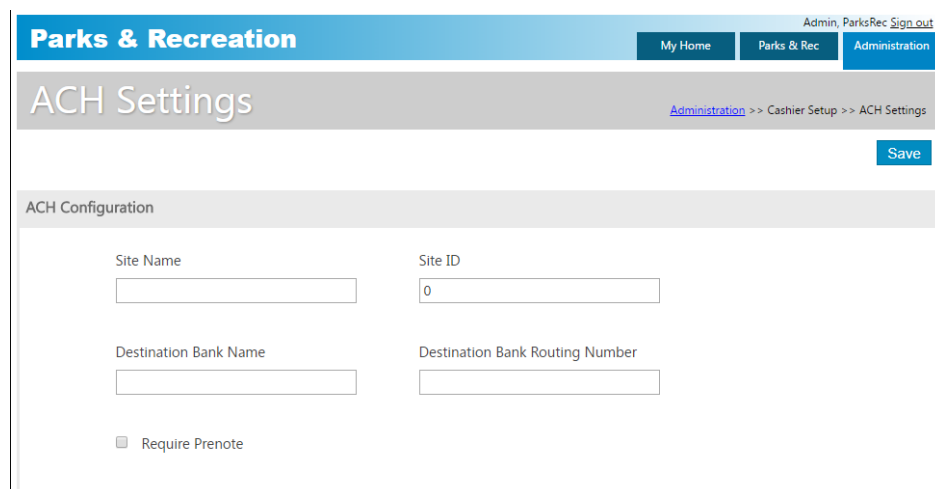
Once you have created restrictions, use the Restrictions group on the Contact Details page to assign a restriction to a contact.

## 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.

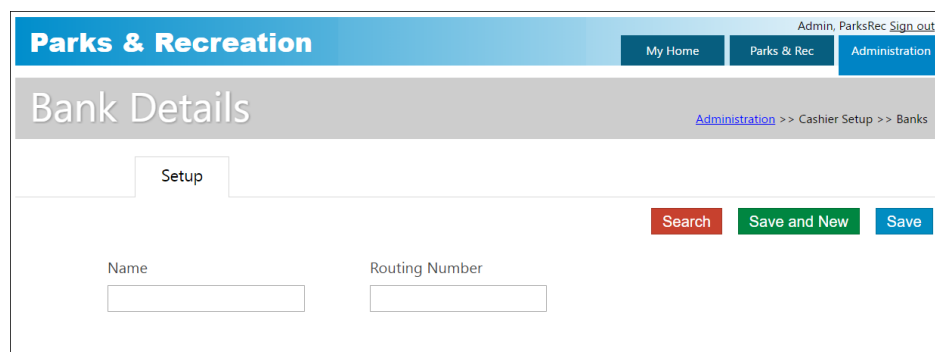


The screenshot shows the 'ACH Settings' page within the 'Parks & Recreation' application. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. A breadcrumb trail indicates the path: 'Administration >> Cashier Setup >> ACH Settings'. A 'Save' button is located in the top right corner. The main section is titled 'ACH Configuration' and contains four input fields: 'Site Name', 'Site ID' (with a value of '0'), 'Destination Bank Name', and 'Destination Bank Routing Number'. At the bottom, there is a checkbox labeled '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

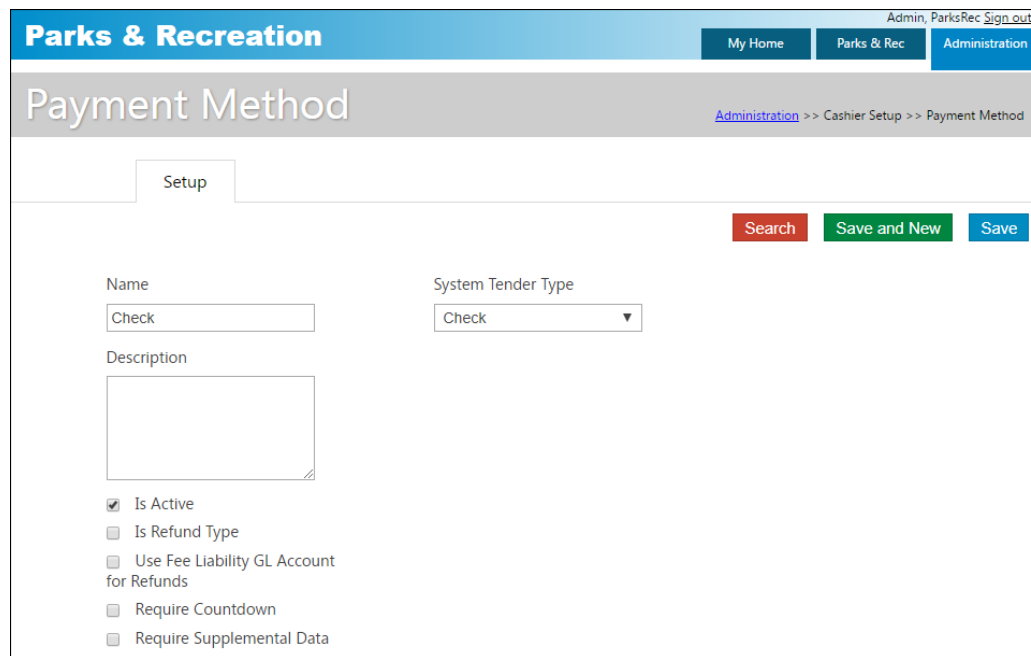
Banks establishes the names and routing numbers of the banks that are available in the Parks and Recreation application.



The screenshot shows the 'Bank Details' page within the 'Parks & Recreation' application. The page has a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. A breadcrumb trail indicates the path: 'Administration >> Cashier Setup >> Banks'. A 'Setup' tab is active. Below the tab, there are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The main section contains two input fields: 'Name' and 'Routing Number'.

## Payment Method

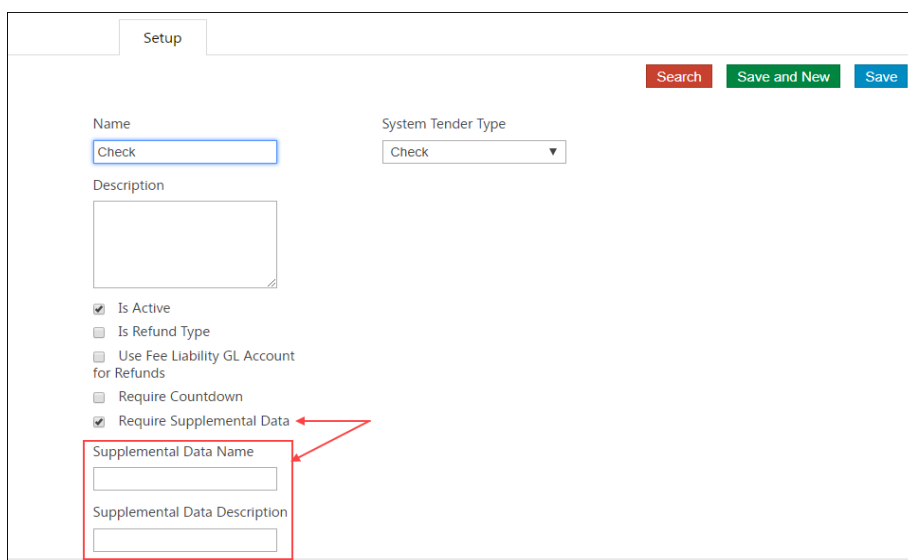
Payment Method establishes the types of payments accepted for activities and events provided by your organization.



The screenshot shows the 'Payment Method' setup page. At the top, there is a blue header with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. Below the header, the page title 'Payment Method' is displayed, along with a breadcrumb trail: 'Administration >> Cashier Setup >> Payment Method'. A 'Setup' tab is active. On the right, there are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The form contains the following fields and options:

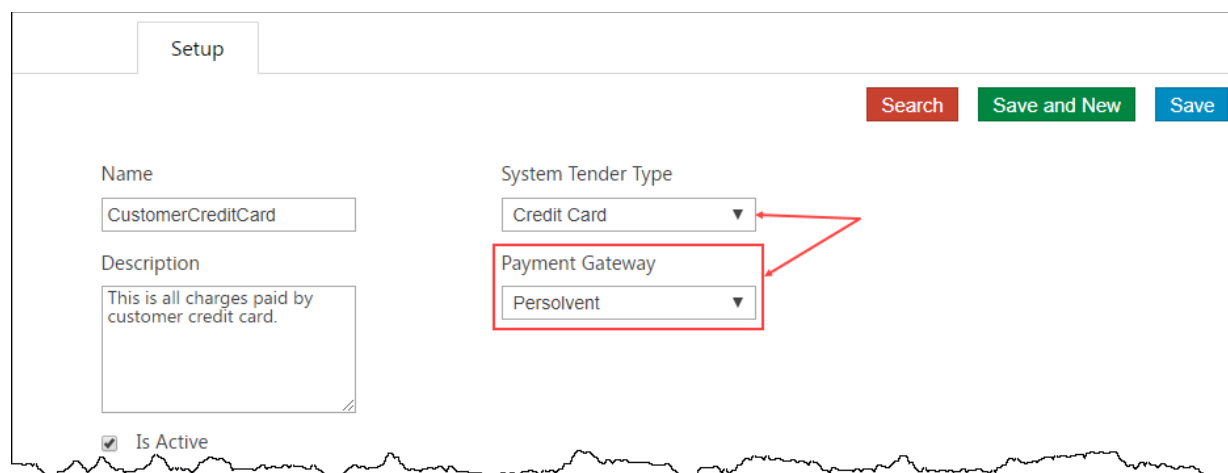
- Name:** A text input field containing the word 'Check'.
- System Tender Type:** A dropdown menu with 'Check' selected.
- Description:** A large text area for additional details.
- Is Active:** A checked checkbox.
- Is Refund Type:** An unchecked checkbox.
- Use Fee Liability GL Account for Refunds:** An unchecked checkbox.
- Require Countdown:** An unchecked checkbox.
- Require Supplemental Data:** An unchecked checkbox.

- 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.



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.



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

<p>Name</p> <input type="text" value="BridgePay"/> <p>Description</p> <div style="border: 1px solid #ccc; padding: 5px; min-height: 50px;">         This is a credit card type for BridgePay       </div> <ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Is Active</li> <li><input checked="" type="checkbox"/> Is Refund Type</li> <li><input type="checkbox"/> Use Fee Liability GL Account for Refunds</li> <li><input type="checkbox"/> Require Countdown</li> <li><input type="checkbox"/> Require Supplemental Data</li> </ul>	<p>System Tender Type</p> <div style="border: 1px solid #ccc; padding: 2px;">         Credit Card ▼       </div> <p>Payment Gateway</p> <div style="border: 1px solid #ccc; padding: 2px;">         BridgePay ▼       </div> <p><input checked="" type="checkbox"/> Apply Credit Card Service Fee</p> <p>Service Fee Calculation Type</p> <div style="border: 1px solid #ccc; padding: 2px;">         - Select - ▼       </div> <p>Service Fee Amount</p> <div style="border: 1px solid #ccc; height: 20px; width: 100%;"></div> <div style="border: 1px solid #ccc; padding: 2px;"> <input checked="" type="checkbox"/> Include in BackOffice  <input checked="" type="checkbox"/> Include in Portal       </div>
--	--

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
<div style="display: flex; justify-content: flex-end; align-items: center;"> <div style="margin-right: 20px;">Subtotal</div> <div style="border: 1px solid #ccc; padding: 2px 5px;">\$ 12.50</div> </div>		
		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.

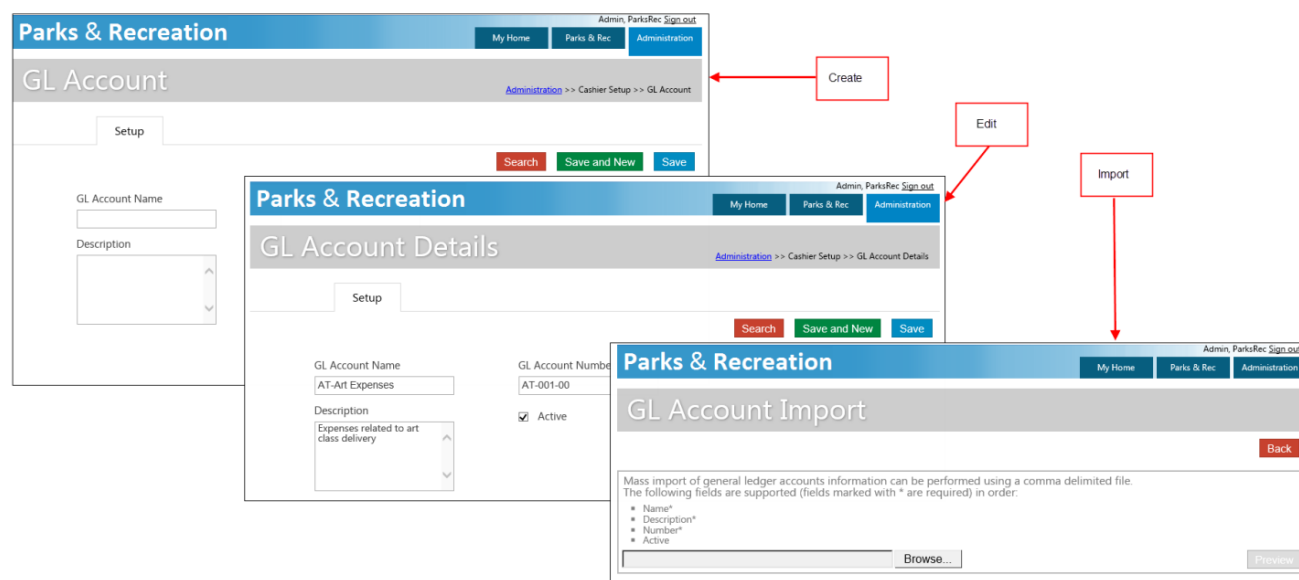
The options for the System Tender Type list are not available for update.

### 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
			My Home Parks & Rec Administration
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		
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Click **Create** or click the **Edit** button to display the Setup page, or click **Import** to display the Account Import page.



The diagram illustrates the navigation paths from the 'GL Account' list page to three different sub-pages:

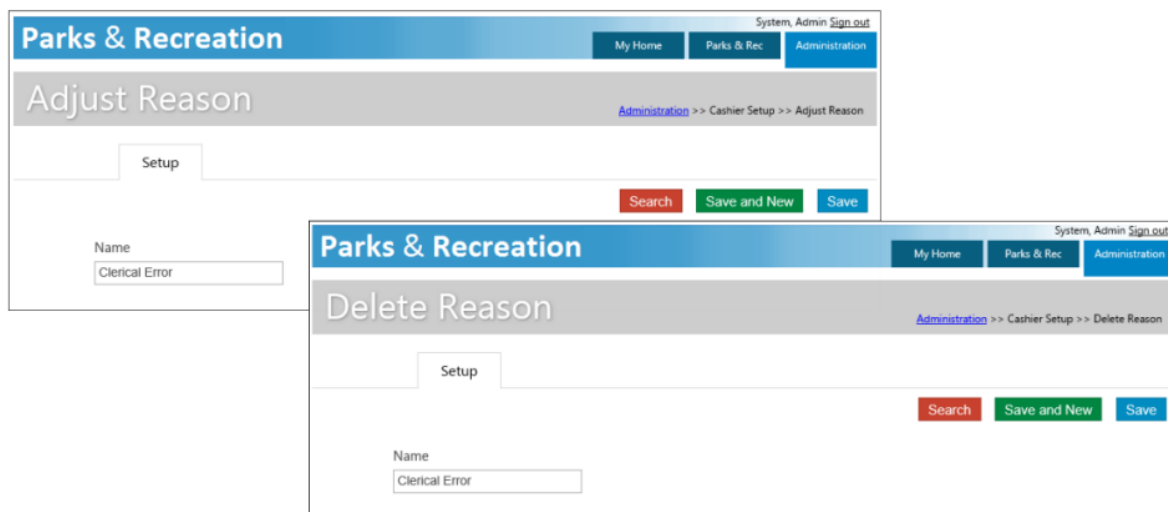
- Create:** A red box labeled 'Create' with an arrow pointing to the 'Create' button on the 'GL Account' list page.
- Edit:** A red box labeled 'Edit' with an arrow pointing to the 'Edit' button on the 'GL Account Details' page.
- Import:** A red box labeled 'Import' with an arrow pointing to the 'Import' button on the 'GL Account Import' page.

The three sub-pages shown are:

- GL Account Setup:** Contains fields for 'GL Account Name' and 'Description'.
- GL Account Details:** Contains fields for 'GL Account Name' (pre-filled with 'AT-Art Expenses'), 'GL Account Number' (pre-filled with 'AT-001-00'), and a checked 'Active' checkbox. The description is 'Expenses related to art class delivery'.
- GL Account Import:** Contains instructions for mass import using a comma delimited file and a list of required fields: Name\*, Description\*, Number\*, and Active. It includes a 'Browse...' button and a 'Preview' button.

## Adjust Reason/Delete Reason

The Adjust Reason and Delete Reason options establish reason codes for transactions that are adjusted or deleted.

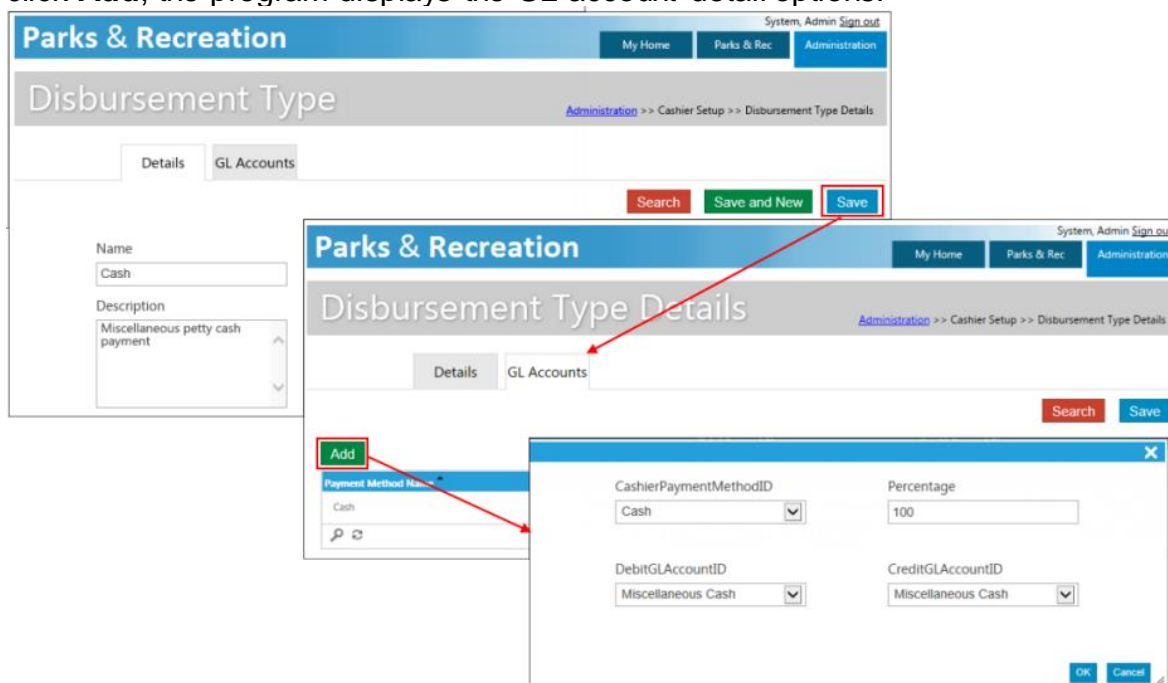


The image shows two screenshots of the Tyler Parks & Recreation software interface. The top screenshot is the 'Adjust Reason' form, and the bottom screenshot is the 'Delete Reason' form. Both forms have a header bar with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. The breadcrumb trail for both is 'Administration >> Cashier Setup >> Adjust Reason' (or 'Delete Reason'). Each form has a 'Setup' tab and a 'Name' field with the text 'Clerical Error'. At the bottom of each form are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue).

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 two screenshots of the Tyler Parks & Recreation software interface. The top screenshot is the 'Disbursement Type' form, and the bottom screenshot is the 'Disbursement Type Details' form. Both forms have a header bar with 'Parks & Recreation' and navigation links for 'My Home', 'Parks & Rec', and 'Administration'. The breadcrumb trail for both is 'Administration >> Cashier Setup >> Disbursement Type Details'. The 'Disbursement Type' form has two tabs: 'Details' and 'GL Accounts'. The 'Details' tab is active, showing a 'Name' field with 'Cash' and a 'Description' field with 'Miscellaneous petty cash payment'. At the bottom of the 'Details' tab are three buttons: 'Search' (red), 'Save and New' (green), and 'Save' (blue). The 'Disbursement Type Details' form has two tabs: 'Details' and 'GL Accounts'. The 'GL Accounts' tab is active, showing a table with columns 'Payment Method Name' and 'GL Account'. The table has one row with 'Cash' in the 'Payment Method Name' column and 'Miscellaneous Cash' in the 'GL Account' column. An 'Add' button (green) is located below the table. A red arrow points from the 'Add' button to a modal window titled 'Disbursement Type Details'. The modal window has fields for 'CashierPaymentMethodID' (dropdown with 'Cash'), 'Percentage' (text field with '100'), 'DebitGLAccountID' (dropdown with 'Miscellaneous Cash'), and 'CreditGLAccountID' (dropdown with 'Miscellaneous Cash'). At the bottom of the modal window are 'OK' and 'Cancel' buttons.

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.

Parks & Recreation



Admin, ParksRec Sign out
My Home
Parks & Rec
Administration

Disbursement Type Details
Administration >> Cashier Setup >> Disbursement Type Details

Details
GL Accounts

Search
Save

Add

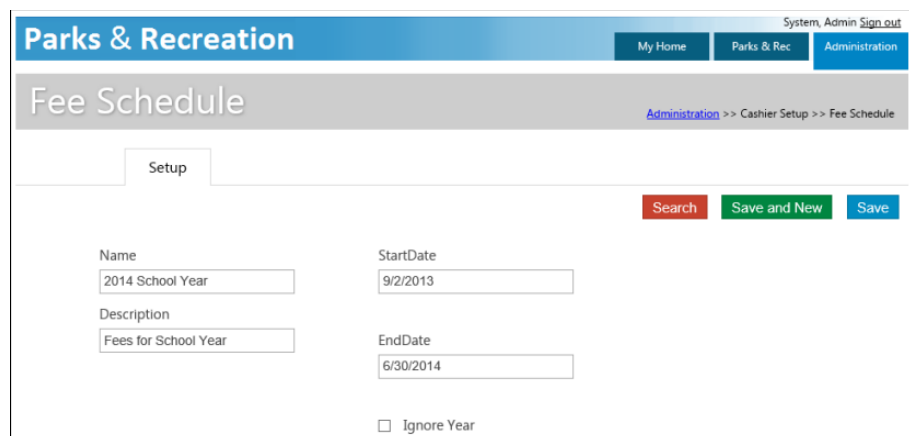
Payment Method Name	Debit Account Name	Credit Account Name	Percentage	
Cash	Miscellaneous Cash	Miscellaneous Cash	100.0000	 

Page 1 of 1
10
View 1 - 2 of 2

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.

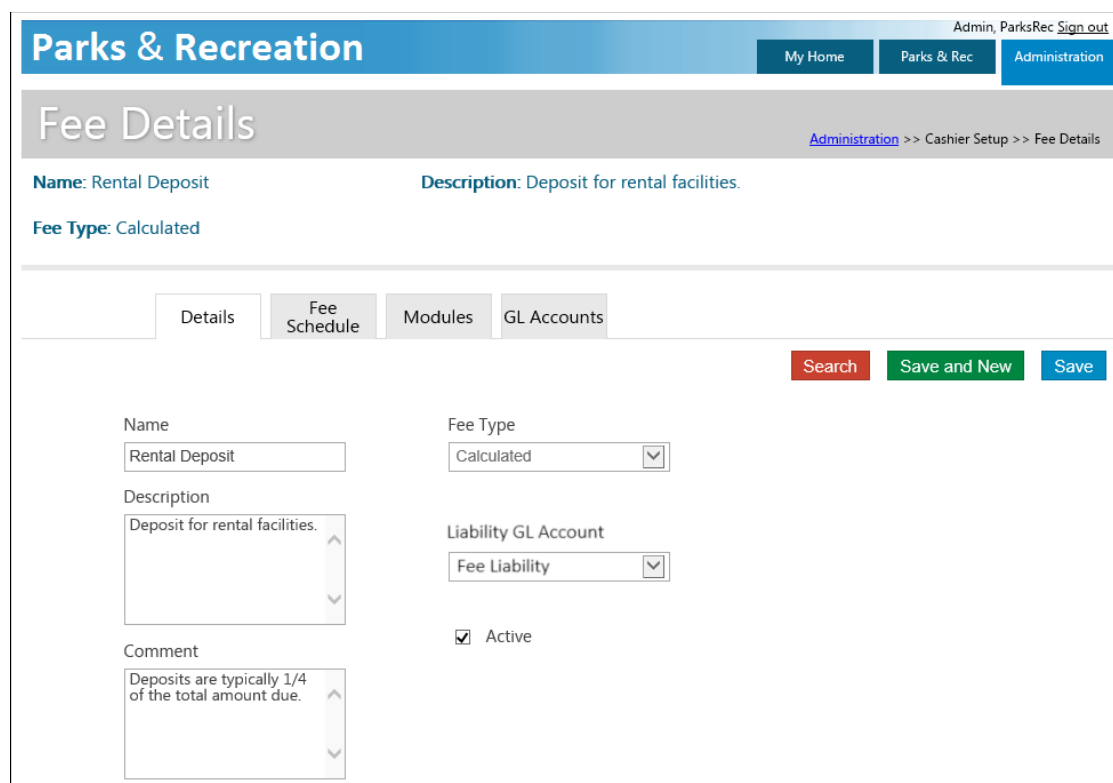


The screenshot shows the 'Fee Schedule' setup form. At the top, there's a navigation bar with 'Parks & Recreation' and links for 'My Home', 'Parks & Rec', and 'Administration'. Below this is a breadcrumb trail: 'Administration >> Cashier Setup >> Fee Schedule'. The form has a 'Setup' tab and buttons for 'Search', 'Save and New', and 'Save'. The fields are as follows:

Name	Start Date
2014 School Year	9/2/2013
Description	End Date
Fees for School Year	6/30/2014

There is also an unchecked checkbox labeled 'Ignore Year'.

## Fee



The screenshot shows the 'Fee Details' form. At the top, there's a navigation bar with 'Parks & Recreation' and links for 'My Home', 'Parks & Rec', and 'Administration'. Below this is a breadcrumb trail: 'Administration >> Cashier Setup >> Fee Details'. The form has tabs for 'Details', 'Fee Schedule', 'Modules', and 'GL Accounts'. The 'Details' tab is active. The fields are as follows:

Name	Fee Type
Rental Deposit	Calculated
Description	Liability GL Account
Deposit for rental facilities.	Fee Liability
Comment	<input checked="" type="checkbox"/> Active
Deposits are typically 1/4 of the total amount due.	

Buttons for 'Search', 'Save and New', and 'Save' are located at the top right of the form.

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

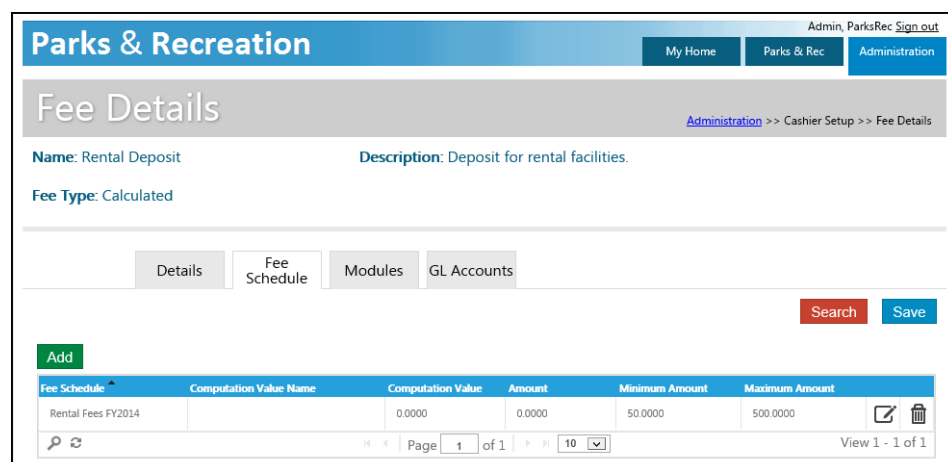
Account for Refunds must be selected in the Payment Method Details for the payment method used with this fee.

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.



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

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

## Fee Details

[Administration >> Cashier Setup >> Fee Details](#)

**Name:** Rental Deposit **Description:** Deposit for rental facilities.

**Fee Type:** Calculated

[Details](#) [Fee Schedule](#) [Modules](#) [GL Accounts](#)

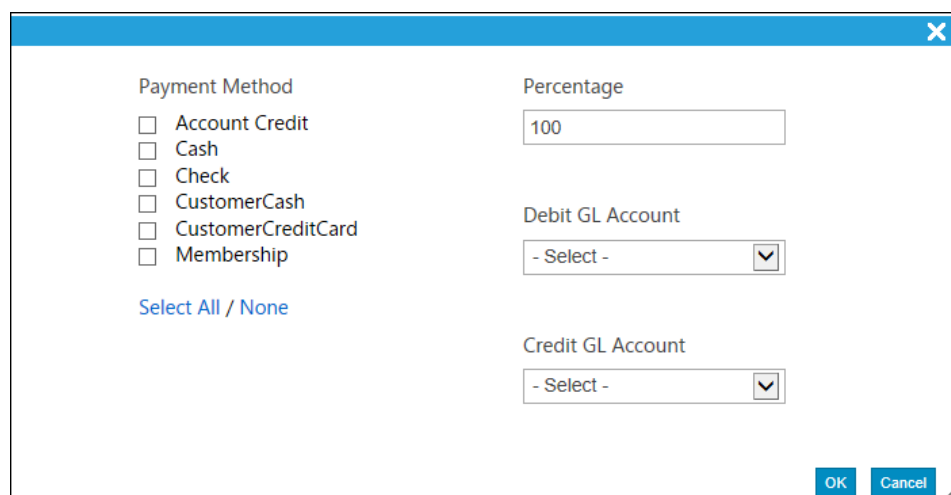
[Add](#) [Search](#) [Save](#)

Fee Schedule	Computation Value Name	Computation Value	Amount	Minimum Amount	Maximum Amount
Rental Fees FY2014		0.0000	0.0000	50.0000	500.0000

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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.



Payment Method

- ☐ Account Credit
- ☐ Cash
- ☐ Check
- ☐ CustomerCash
- ☐ CustomerCreditCard
- ☐ Membership

Select All / None

Percentage

100

Debit GL Account

- Select -

Credit GL Account

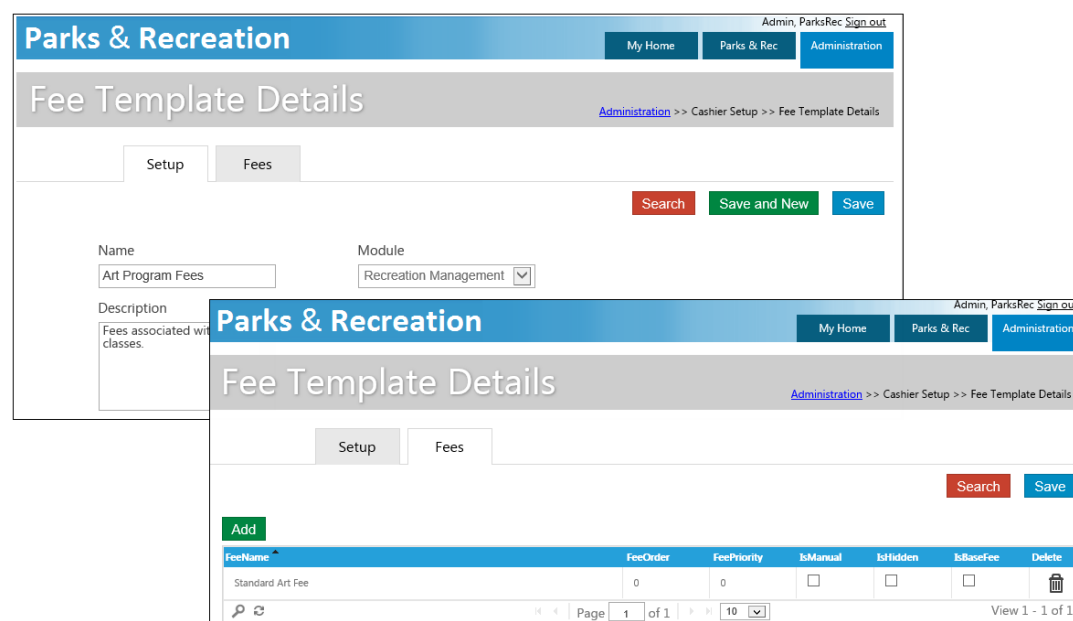
- Select -

OK Cancel

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.



**Parks & Recreation** Admin, ParksRec Sign out

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### Fee Template Details

Administration >> Cashier Setup >> Fee Template Details

Setup Fees

Search Save and New Save

Name: Art Program Fees Module: Recreation Management

Description: Fees associated with classes.

**Parks & Recreation** Admin, ParksRec Sign out

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### Fee Template Details

Administration >> Cashier Setup >> Fee Template Details

Setup Fees

Search Save

Add

FeeName	FeeOrder	FeePriority	IsManual	IsHidden	IsBaseFee	Delete
Standard Art Fee	0	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Page 1 of 1 10 View 1 - 1 of 1

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.



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

## Expense Type

[Administration](#) >> [Cashier Setup](#) >> [Expense Type](#)

**Setup**

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

Expense Type Name  
Rental Maintenance

Cashier Expense Source  
Rental Item

Description  
Maintenance for rental items

Prefix  
RTL-

☒ Active

## 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** System, Admin [Sign out](#)

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

## Expense Method

[Administration](#) >> [Cashier Setup](#) >> [Expense Method](#)

**Setup**

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

Expense Method Name  
Cash

☐ Require Supplemental Data

Description  
Cash disbursements

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

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

## Expense Method

[Administration](#) >> [Cashier Setup](#) >> [Expense Method](#)

**Setup**

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

Expense Method Name  
Cash

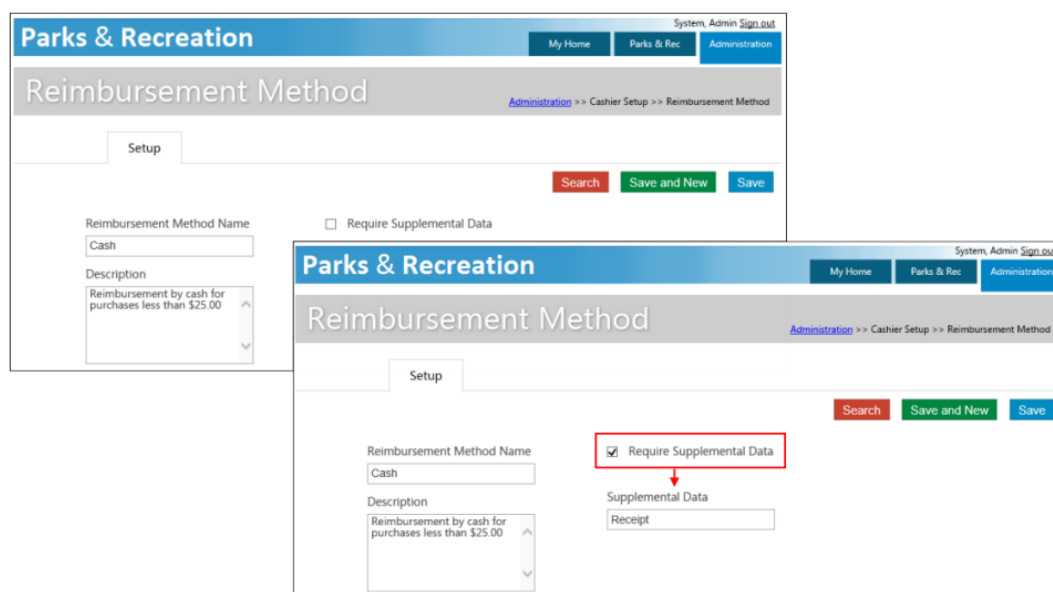
☒ Require Supplemental Data

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  
My Home Parks & Rec Administration

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

Reimbursement Method Name: Cash

Description: Reimbursement by cash for purchases less than \$25.00

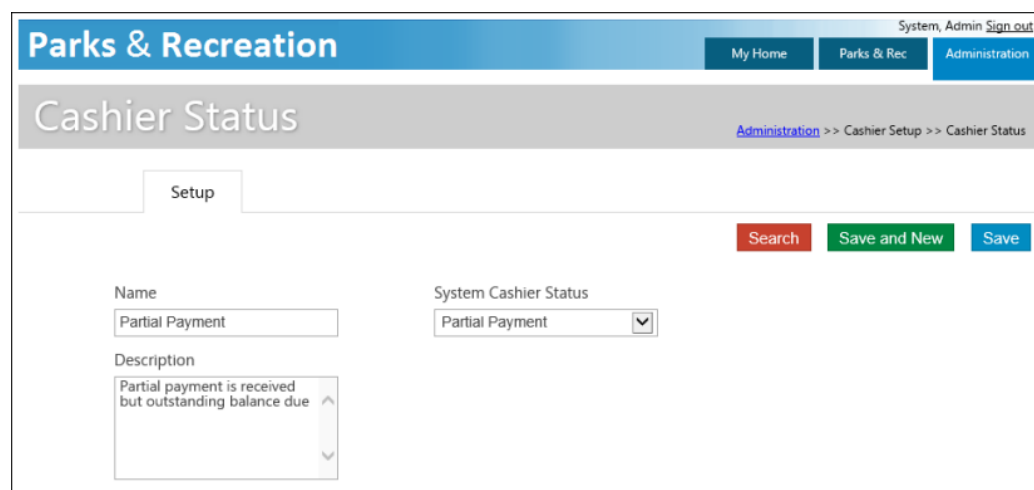
☒ Require Supplemental Data

Supplemental Data: Receipt

Search Save and New Save

## Cashier Status

Cashier Status provides status codes for payments.



**Parks & Recreation** System, Admin Sign out  
My Home Parks & Rec Administration

Cashier Status Administration >> Cashier Setup >> Cashier Status

Setup

Name: Partial Payment

Description: Partial payment is received but outstanding balance due

System Cashier Status: Partial Payment

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

[Admin](#), [ParksRec](#) [Sign out](#)

My Home





















Parks & Rec


Administration

## Discount

[Administration](#) >> [Cashier Setup](#) >> [Discount](#)

Create

Name	Description	Type	Discount		
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%		



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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.

## Discount Details

[Administration](#) >> [Cashier Setup](#) >> [Discount Details](#)

Setup

Search

Name\*

Description

Discount Type\*  

Custom
▼

☒ Available to Family Members

☒ Available to Classes

☒ Available to Rentals

☒ Available to Memberships

☒ Available to Non-Resident

Dollar Amount

Percentage

Start Date\*

End Date

Save and New

Save

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\*

Multi-Family ▼

- ☒ Available to Classes
- ☒ Available to Rentals
- ☒ Available to Memberships
- ☒ Available to Non-Resident

### Multi-Family Discount Setup

Family Member #2
\$ or 
%

↑ ↓ ✕

Family Member #3
\$ or 
%

↑ ↓ ✕

Family Member #4
\$ or 
%

↑ ↓ ✕

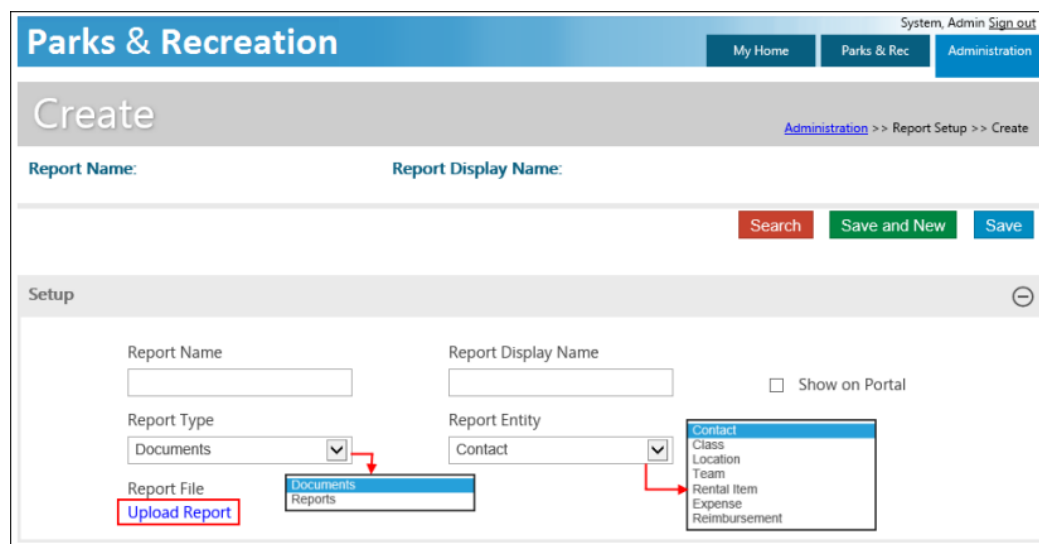
Family Member #5
\$ or 
%

Save and New

Save

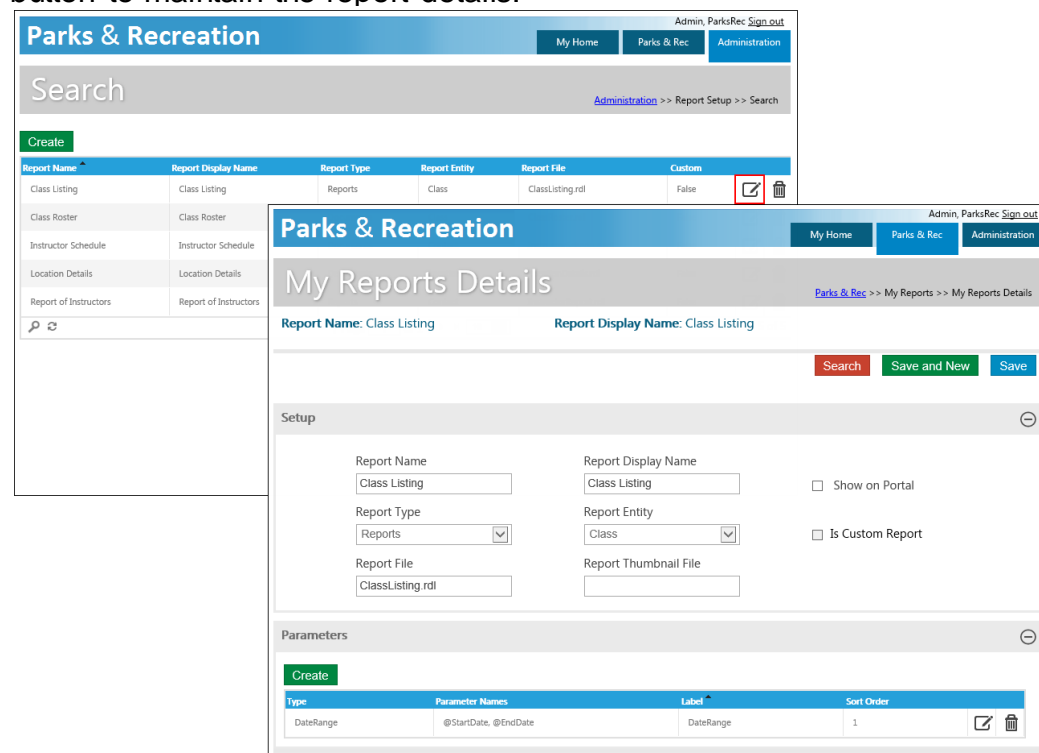
## Report Setup

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.



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.



Report Name	Report Display Name	Report Type	Report Entity	Report File	Custom
Class Listing	Class Listing	Reports	Class	ClassListing.rdl	False
Class Roster	Class Roster				
Instructor Schedule	Instructor Schedule				
Location Details	Location Details				
Report of Instructors	Report of Instructors				

### 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**

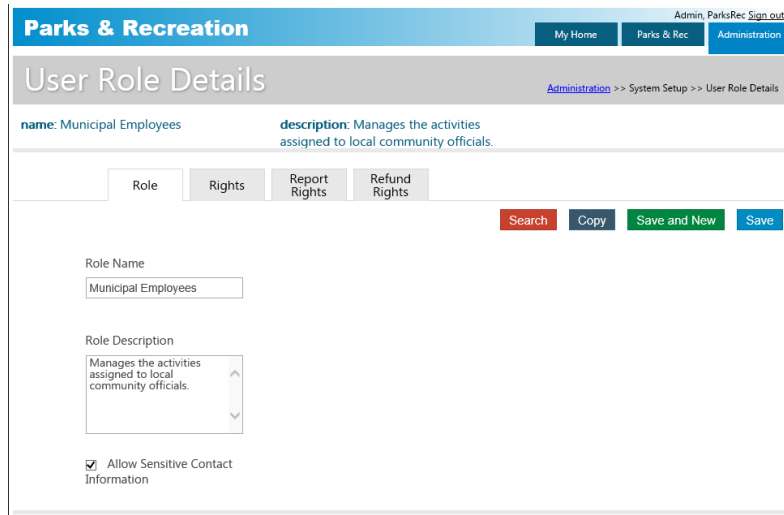
Type	Parameter Names	Label	Sort Order
DateRange	@StartDate, @EndDate	DateRange	1

## 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

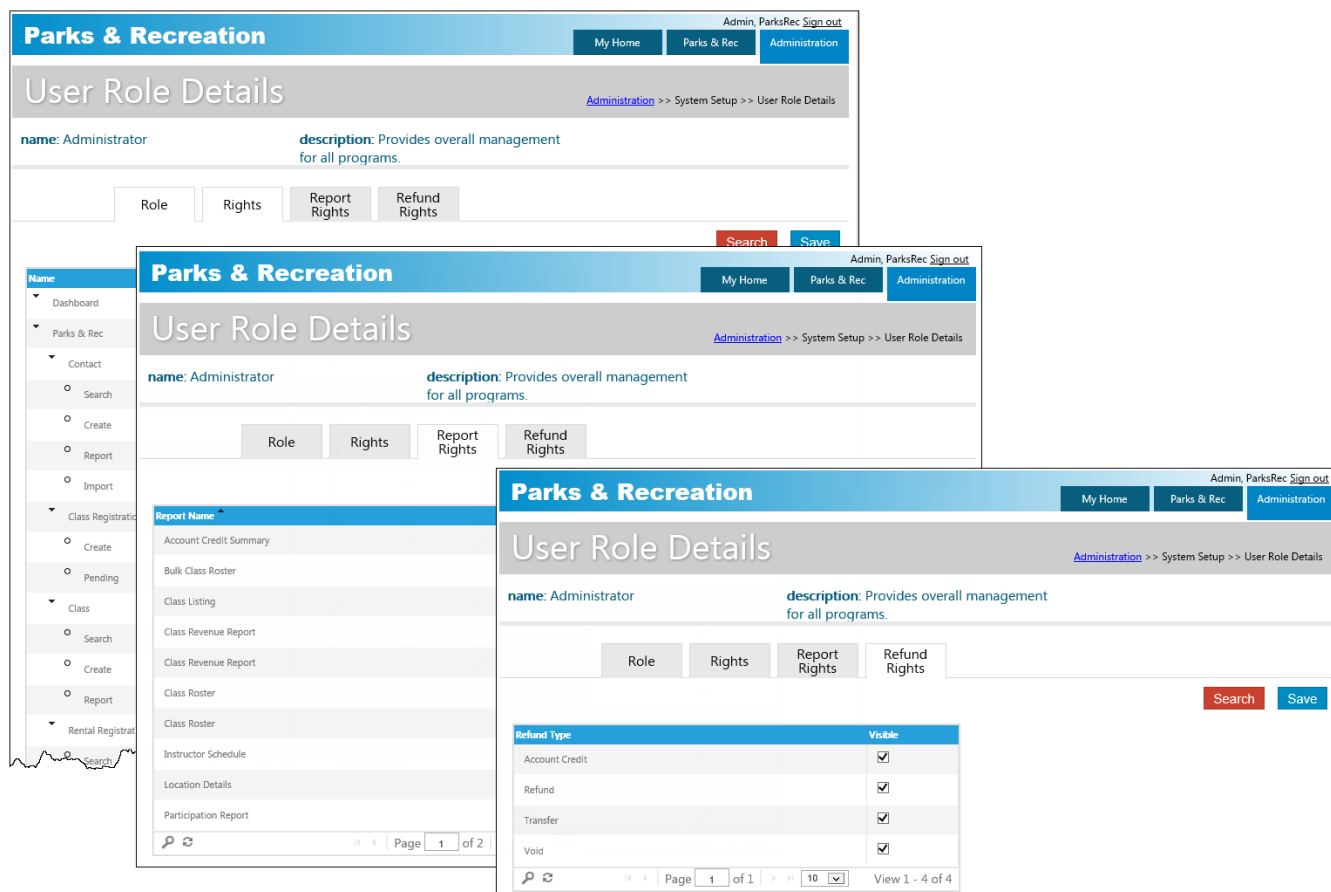
Search Copy Save and New Save

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.



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

## User Role Details

Administration >> System Setup >> User Role Details

**name:** Administrator **description:** Provides overall management for all programs.

Role Rights Report Rights Refund Rights

Search Save

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

## User Role Details

Administration >> System Setup >> User Role Details

**name:** Administrator **description:** Provides overall management for all programs.

Role Rights Report Rights Refund Rights

Search Save

**Report Name:**

- Account Credit Summary
- Bulk Class Roster
- Class Listing
- Class Revenue Report
- Class Revenue Report
- Class Roster
- Class Roster
- Instructor Schedule
- Location Details
- Participation Report

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

## User Role Details

Administration >> System Setup >> User Role Details

**name:** Administrator **description:** Provides overall management for all programs.

Role Rights Report Rights Refund Rights

Search Save

Refund Type	Visible
Account Credit	<input checked="" type="checkbox"/>
Refund	<input checked="" type="checkbox"/>
Transfer	<input checked="" type="checkbox"/>
Void	<input checked="" type="checkbox"/>

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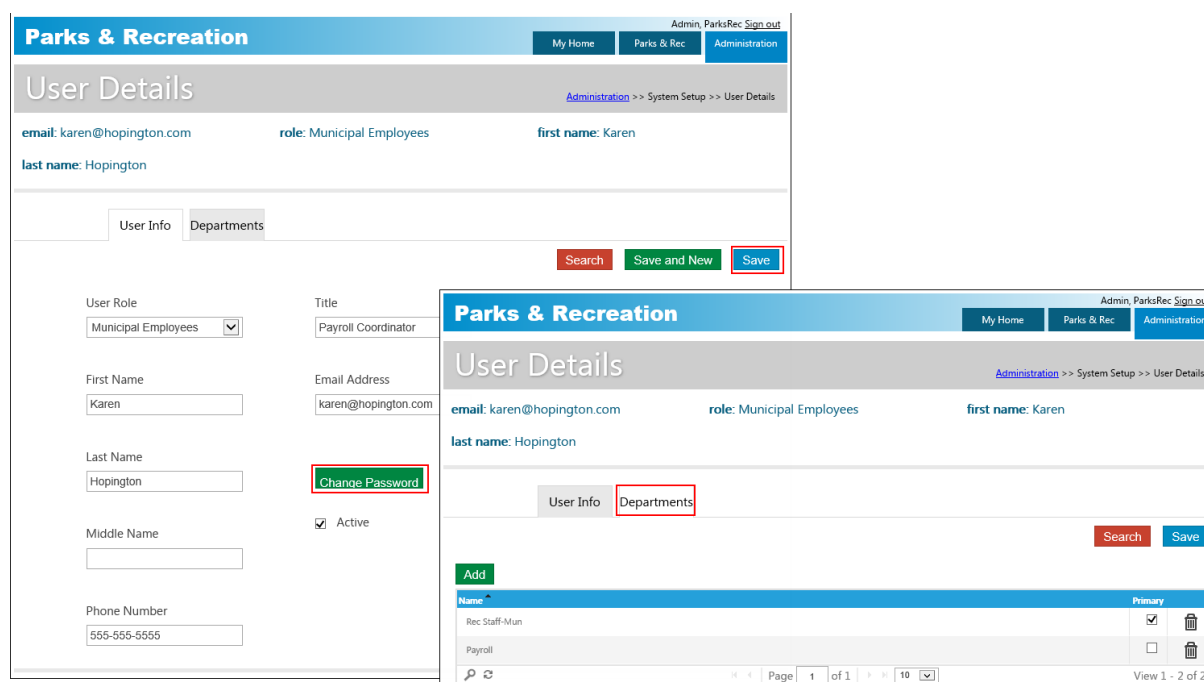
Click **Rights** to assign permissions to the role, click **Report Rights** to specify the reporting permissions available to users who are assigned to the role, and click **Refund Rights** to assign refund permissions to the role.

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** Admin, ParksRec Sign out

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### User Details

Administration >> System Setup >> User Details

email: karen@hopington.com role: Municipal Employees first name: Karen  
last name: Hopington

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** Admin, ParksRec Sign out

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### User Details

Administration >> System Setup >> User Details

email: karen@hopington.com role: Municipal Employees first name: Karen  
last name: Hopington

User Info Departments

Search Save

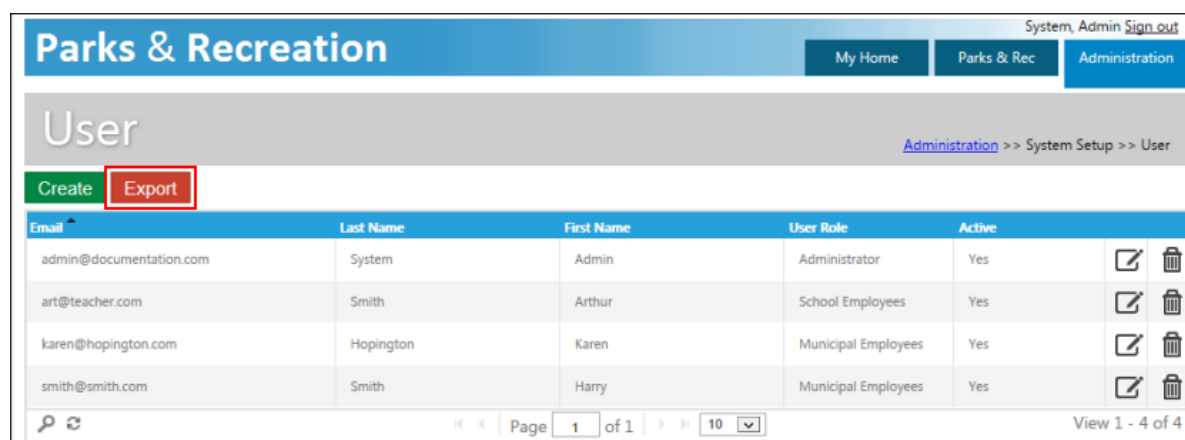
Add

Name	Primary
Rec Staff-Mun	<input checked="" type="checkbox"/>
Payroll	<input type="checkbox"/>

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The Change Password option delivers a new password to the user by email.

When you use the Search option to create a list of users, click **Export** on the User page to export the user data to Microsoft Excel.



**Parks & Recreation** System, Admin Sign out

My Home Parks & Rec Administration

## User

Administration >> System Setup >> User

Create **Export**

Email	Last Name	First Name	User Role	Active	
admin@documentation.com	System	Admin	Administrator	Yes	
art@teacher.com	Smith	Arthur	School Employees	Yes	
karen@hopington.com	Hopington	Karen	Municipal Employees	Yes	
smith@smith.com	Smith	Harry	Municipal Employees	Yes	

Page 1 of 1 10 View 1 - 4 of 4

## User Import

User Import allows you to import user details from a comma-separated values (.csv) file.

Parks & Recreation

Admin, ParksRec Sign out

My HomeParks & RecAdministration

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

## 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 HomeParks & RecAdministration

Department

Administration >> System Setup >> Department

Setup

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

Time Picker Interval  
5

Time Zone  
(UTC-05:00) Eastern Time

Page Size in Admin Site  
10

File Storage Service Endpoint  
https://fdvmss.tyler tech.com/TPAR/QA/Development/TPAR.Admin.12CI/Services.

Portal URL  
https://fdvmss.tyler tech.com/TPAR/QA/Development/TPAR.Online.12CI/QA-Sara

☐ Allow more than 100% GL Allocation

☐ Payment Demo Enabled

☐ Contact Phone Required

☒ Remove Heat Map

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.

The Password Settings fields define the minimum password length, maximum failed login attempts, password history, and other password requirements.

Password Settings

Max Failed Login Attempts

10

Password Minimum Length

6

Password History

3

☐ Require Upper Case

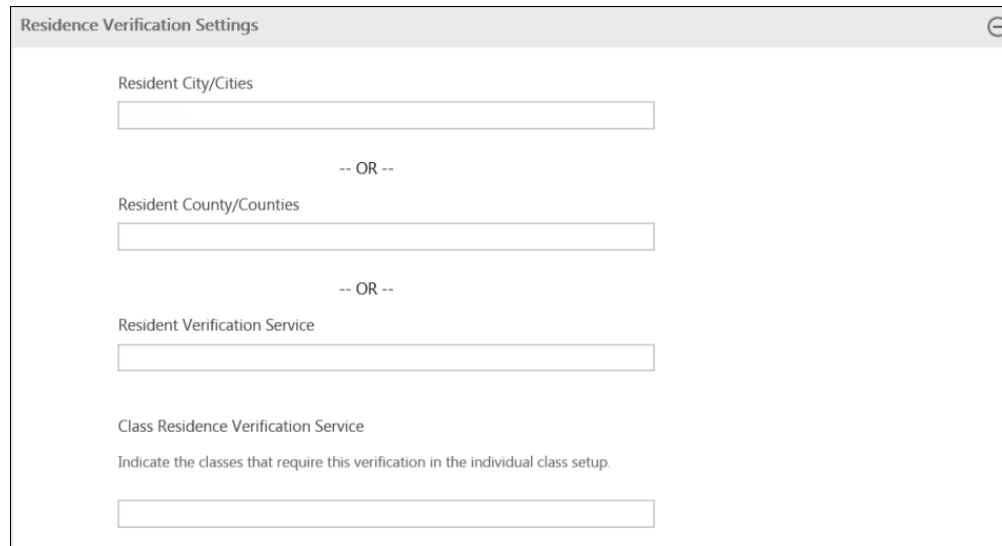
☐ Require Numeric

☐ 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 <b>3</b> , 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.



The screenshot shows a web form titled "Residence Verification Settings". It contains four input fields with labels: "Resident City/Cities", "Resident County/Counties", "Resident Verification Service", and "Class Residence Verification Service". Between the first two fields and between the second and third fields, there is a "-- OR --" separator. Below the "Class Residence Verification Service" label, there is a note: "Indicate the classes that require this verification in the individual class setup." followed by an empty input field.

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.

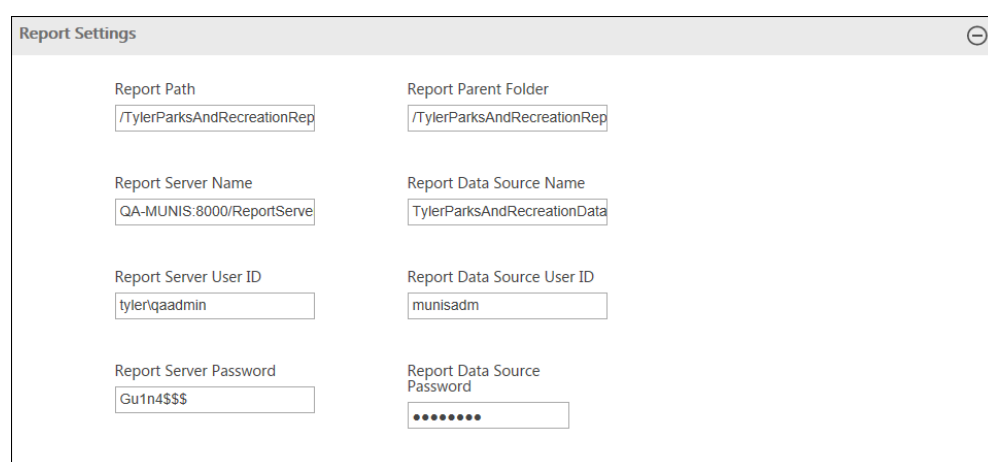
## Email Settings

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.

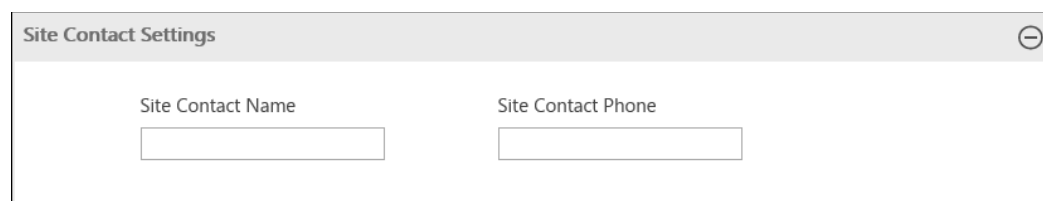


Report Settings dialog box showing configuration fields:

Report Path /TylerParksAndRecreationRep	Report Parent Folder /TylerParksAndRecreationRep
Report Server Name QA-MUNIS:8000/ReportServe	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.

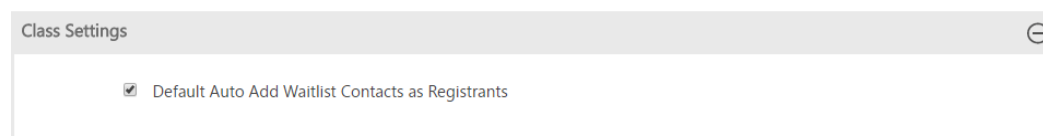


Site Contact Settings dialog box showing configuration fields:

Site Contact Name <input type="text"/>	Site Contact Phone <input type="text"/>
---	--

## 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 dialog box showing configuration fields:

<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

9

Portal Display Name

St. Louis County Parks and Rec

(Maximum 35 characters)

Portal Disclaimer Text

Default Sort Column

Class

Default Sort Direction

Ascending

Cart Limit on Rental Items

3

☒ Allow Payment on Portal

☒ Allow Invoicing on Portal

☒ Allow Invoice Payment on Portal

Google Analytics Tracking Code

Create a Google Analytics account at <https://www.google.com/analytics/> and paste the Tracking Code here.

```

<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>

```

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.

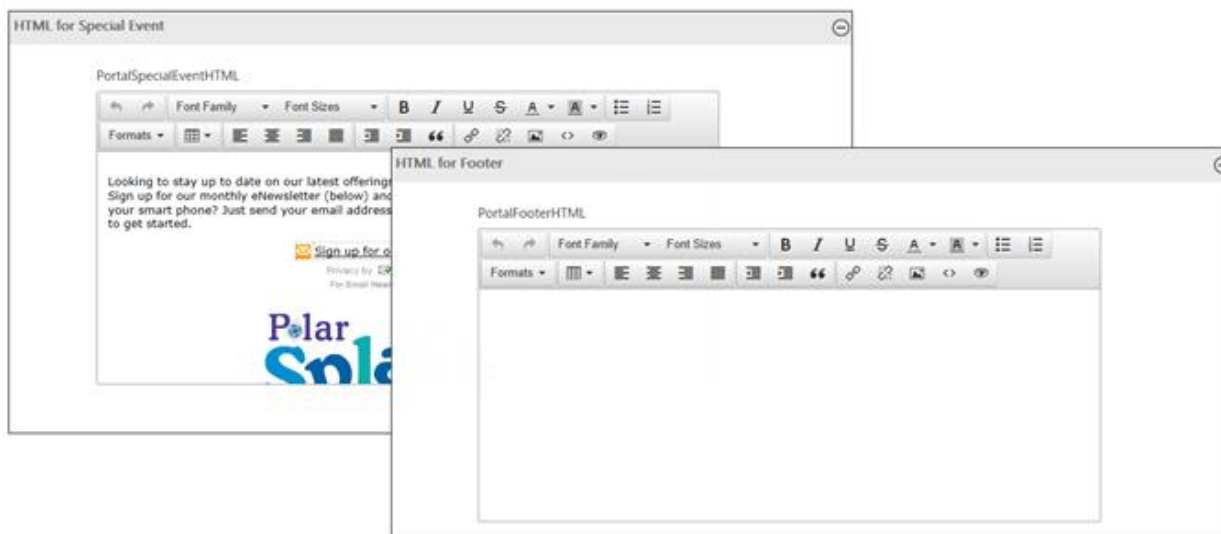
Selecting the Allow Invoice Payment on Portal check box makes the User Order History page available in the user's profile on the citizen portal, and allows them to pay invoices from the portal.



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 Fitness	PortalRentalBox1	PortalLogInBox1 Fitness
PortalClassBox2 Leagues	PortalRentalBox2	PortalLogInBox2 Leagues
PortalClassBox3 Youth Sports	PortalRentalBox4 browse classes	PortalLogInBox3 Youth Sports
PortalClassBox4 Register Now		PortalLogInBox4 Equipment Rental
		PortalLogInBox5 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.

<b>Registration Setting</b>	
<input checked="" type="checkbox"/> Display Registration Button in Portal?	Portal Get Registered Button <input type="text" value="get registered"/>
<b>Facility Setting</b>	
<input checked="" type="checkbox"/> Display Facility Button in Portal?	Portal Facility Browse Button <input type="text" value="browse facilities"/>
<b>Class Setting</b>	
<input checked="" type="checkbox"/> Display Class Button in Portal?	Portal Class Browse Button <input type="text" value="browse classes"/>
<b>Membership Setting</b>	
<input type="checkbox"/> Display Membership Button in Portal?	Portal Join Membership Button <input type="text"/>

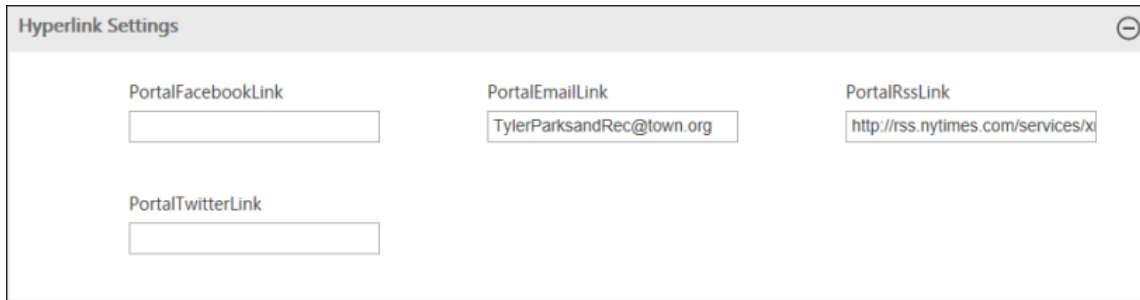
For Facility settings, if you select the Display check box, the citizen portal includes the option for browsing rental facilities. When you select this check box, use the **Portal Facility Browse** button box to define the name for the facility option that displays in the portal.

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.

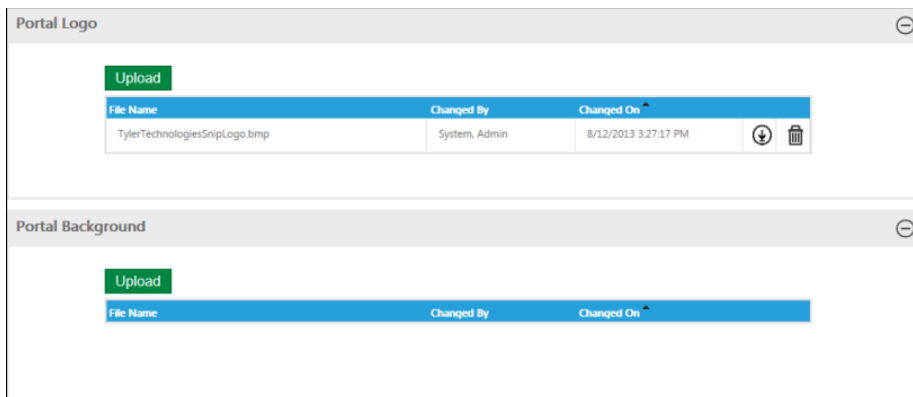


The screenshot shows a window titled "Hyperlink Settings" with a close button in the top right corner. Inside the window, there are four text input fields arranged in two rows. The first row contains "PortalFacebookLink", "PortalEmailLink" (with the value "TylerParksandRec@town.org"), and "PortalRssLink" (with the value "http://rss.nytimes.com/services/xi"). The second row contains "PortalTwitterLink".

### 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.



The screenshot shows two windows. The top window is titled "Portal Logo" and contains an "Upload" button and a table with the following data:

File Name	Changed By	Changed On
TylerTechnologiesSnipLogo.bmp	System, Admin	8/12/2013 3:27:17 PM

The bottom window is titled "Portal Background" and also contains an "Upload" button and a table with the same headers as the one above.

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.

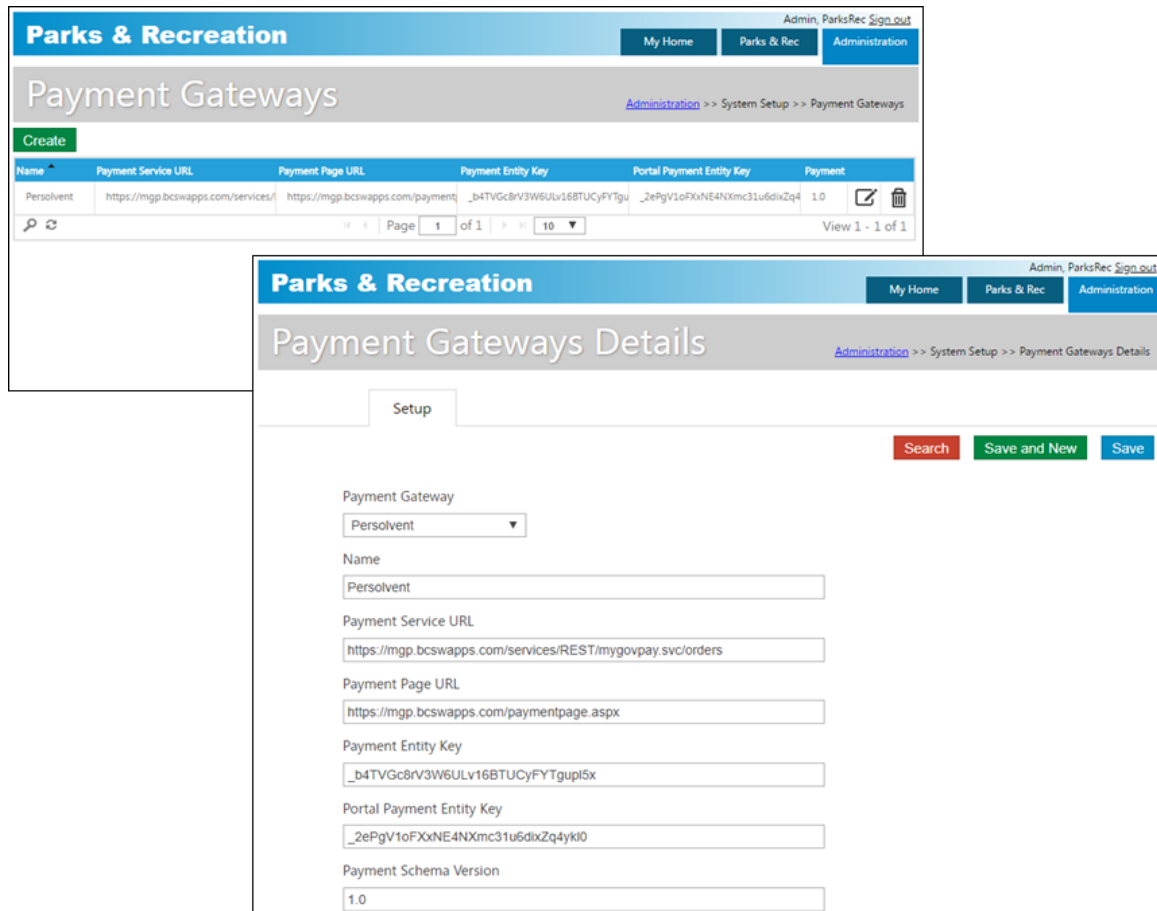
When you hover your pointer over the help button on the Upload page, ToolTips provide upload details.



The screenshot shows a window titled "Upload" with a close button in the top right corner. Inside the window, there is a text input field with a "Browse..." button to its right. Below the input field, there is an "Upload" button, a help button (a blue circle with a question mark), and a "Close" button. A red arrow points to the help button.

## Payment Gateways

The Payment Gateways category defines the payment gateway and its settings.



The screenshot displays two overlapping windows from the 'Parks & Recreation' administration system. The top window shows the 'Payment Gateways' list with a table containing one entry for 'Persolvent'. The bottom window shows the 'Payment Gateways Details' setup form for the 'Persolvent' gateway.

Name	Payment Service URL	Payment Page URL	Payment Entity Key	Portal Payment Entity Key	Payment
Persolvent	https://mgp.bcswwapps.com/services/	https://mgp.bcswwapps.com/payment	_b4TVGc8rV3W6ULv16BTUCyFYTgu	_2ePgV1oFXxNE4NXmc31u6dxZq4	1.0

**Payment Gateways Details Setup**

Payment Gateway: Persolvent

Name: Persolvent

Payment Service URL: https://mgp.bcswwapps.com/services/REST/mygovpay.svc/orders

Payment Page URL: https://mgp.bcswwapps.com/paymentpage.aspx

Payment Entity Key: \_b4TVGc8rV3W6ULv16BTUCyFYTguPl5x

Portal Payment Entity Key: \_2ePgV1oFXxNE4NXmc31u6dxZq4yk0

Payment Schema Version: 1.0

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*

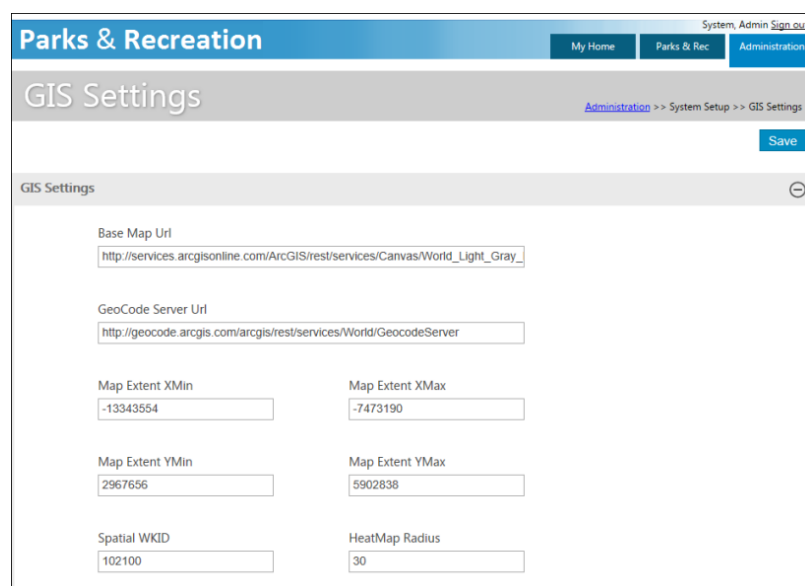
### Portal

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.



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

My Home Parks & Rec Administration

### GIS Settings

[Administration](#) >> System Setup >> GIS Settings [Save](#)

GIS Settings

Base Map Url

GeoCode Server Url

Map Extent XMin

Map Extent XMax

Map Extent YMin

Map Extent YMax

Spatial WKID

HeatMap Radius

## 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.

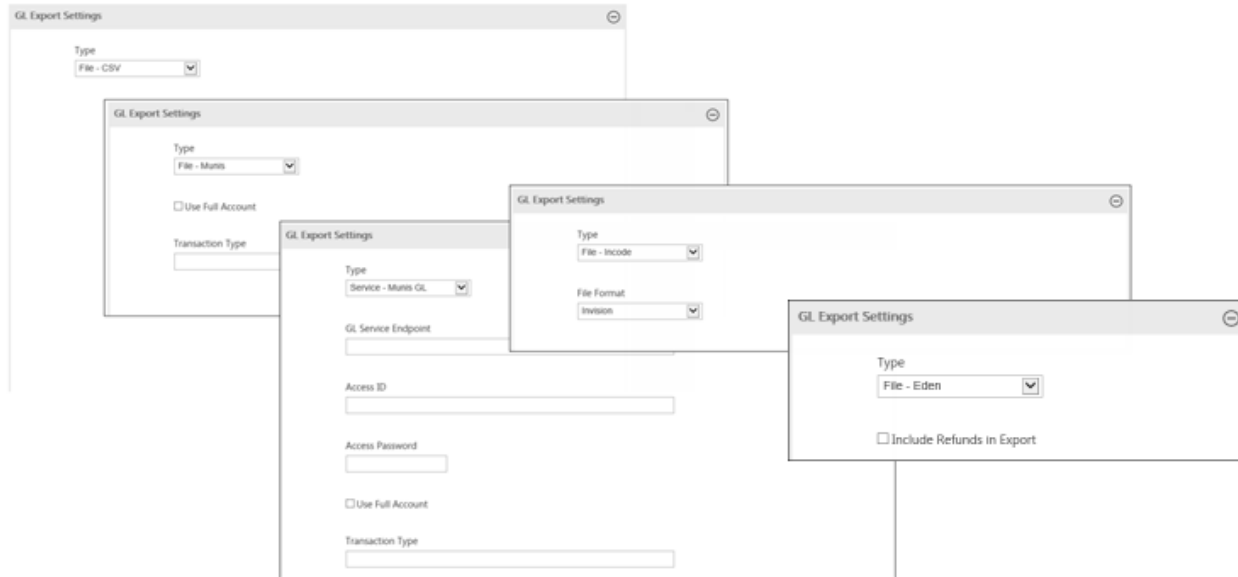
### GL Export Settings

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.

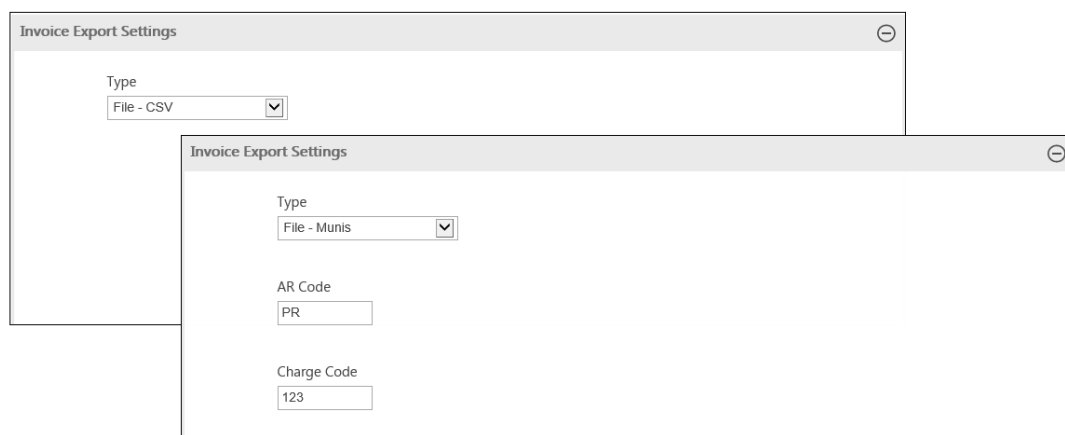
If you select Service–Munis GL, you must specify the service endpoint for the Munis general ledger in the GL Service Endpoint box, and you must provide the Munis web service user name and password.

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**

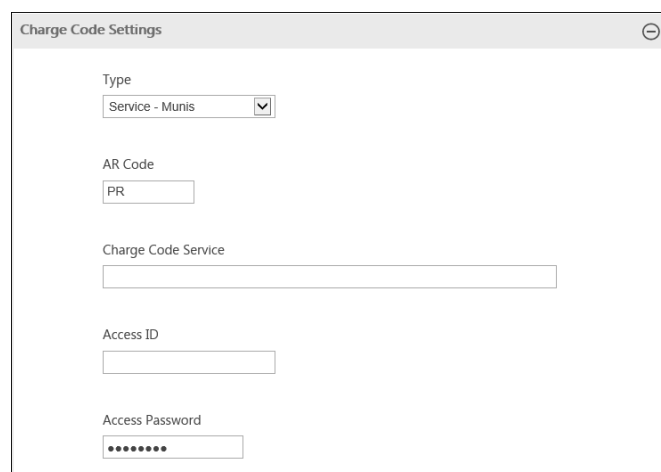
The Invoice Export Settings group supports the invoicing process for class registrations processed using the Parks & Rec tab. In this group, the Type list determines the type of invoice export to create: File–Munis or File–CSV.



The screenshot shows two overlapping 'Invoice Export Settings' dialog boxes. The top box has a 'Type' dropdown menu set to 'File - CSV'. The bottom box, which is in focus, has a 'Type' dropdown menu set to 'File - Munis', an 'AR Code' text field containing 'PR', and a 'Charge Code' text field containing '123'.

### Charge Code Settings

Charge Codes Settings enables Tyler Parks and Recreation fees to be associated with Munis charge codes.

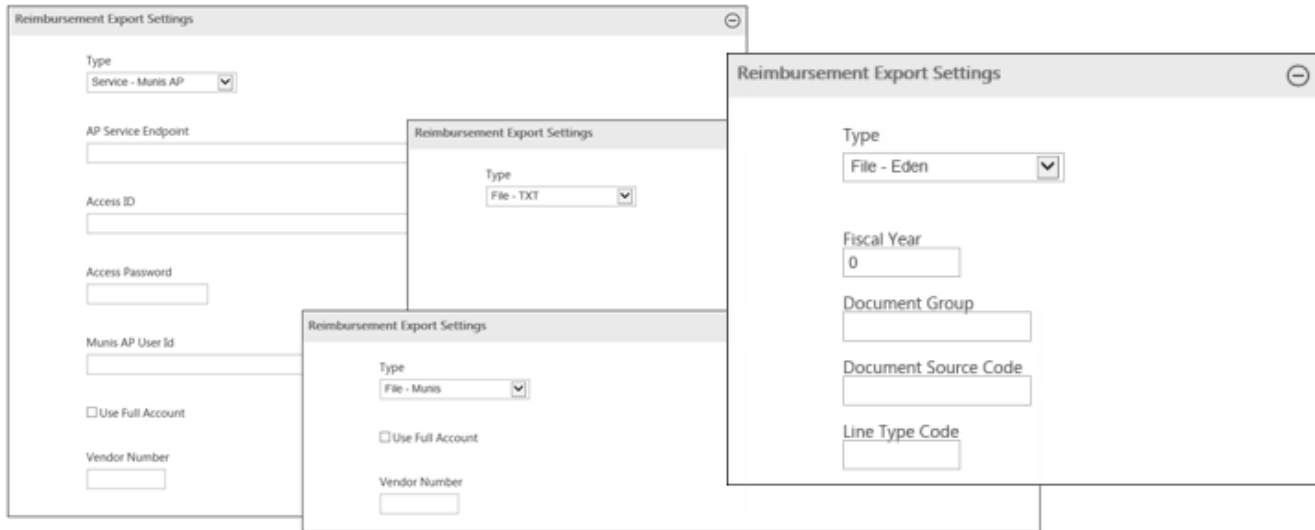


The screenshot shows the 'Charge Code Settings' dialog box. It contains a 'Type' dropdown menu set to 'Service - Munis', an 'AR Code' text field containing 'PR', a 'Charge Code Service' text field, an 'Access ID' text field, and an 'Access Password' text field with masked characters (dots).

- 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.

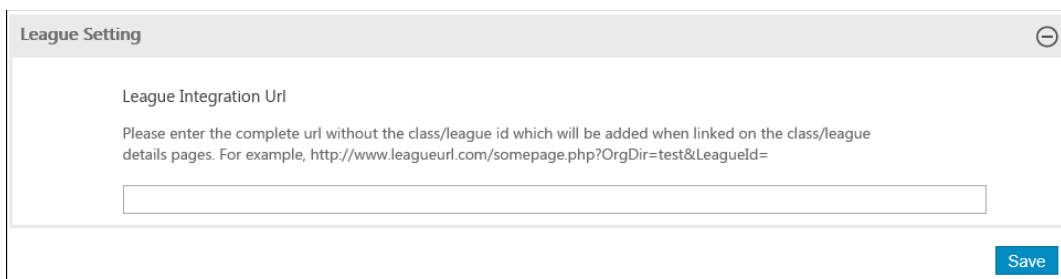
### Reimbursement Export Settings

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.



### League Settings

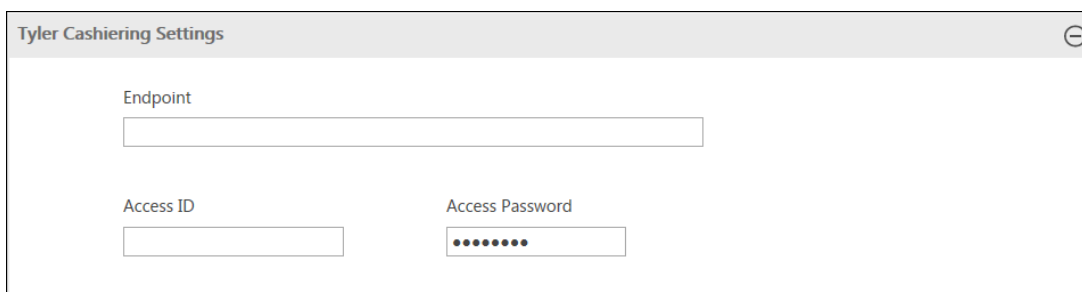
Tyler Parks and Recreation integrates with QuickScores to facilitate league management. On the Integration Settings page, the League setting allows you to input the entire league URL.



The 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

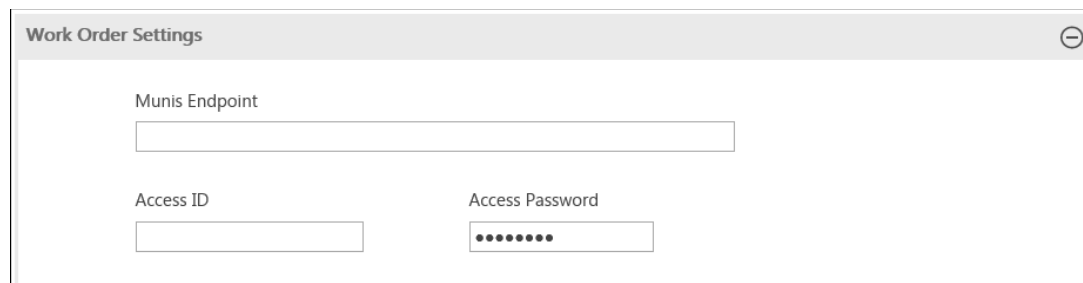
The Tyler Cashiering Settings provide the endpoint and access values required to integrate Tyler Parks and Recreation with Tyler Cashiering for managing payments and collections.





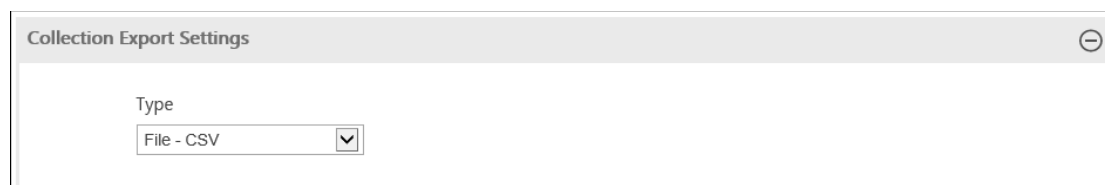
### Work Order Settings

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.



### 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.



### 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.

Admin, ParksRec [Sign out](#)

My Home

Parks & Rec

Administration

Parks & Recreation

System Log

Administration >> System Setup >> System Log

Search System Log

Keyword

Start Date

End Date

5/4/2017 12:00 AM

5/4/2017 2:12 PM

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

<

Page 1 of 62

>

View 1 - 10 of 612

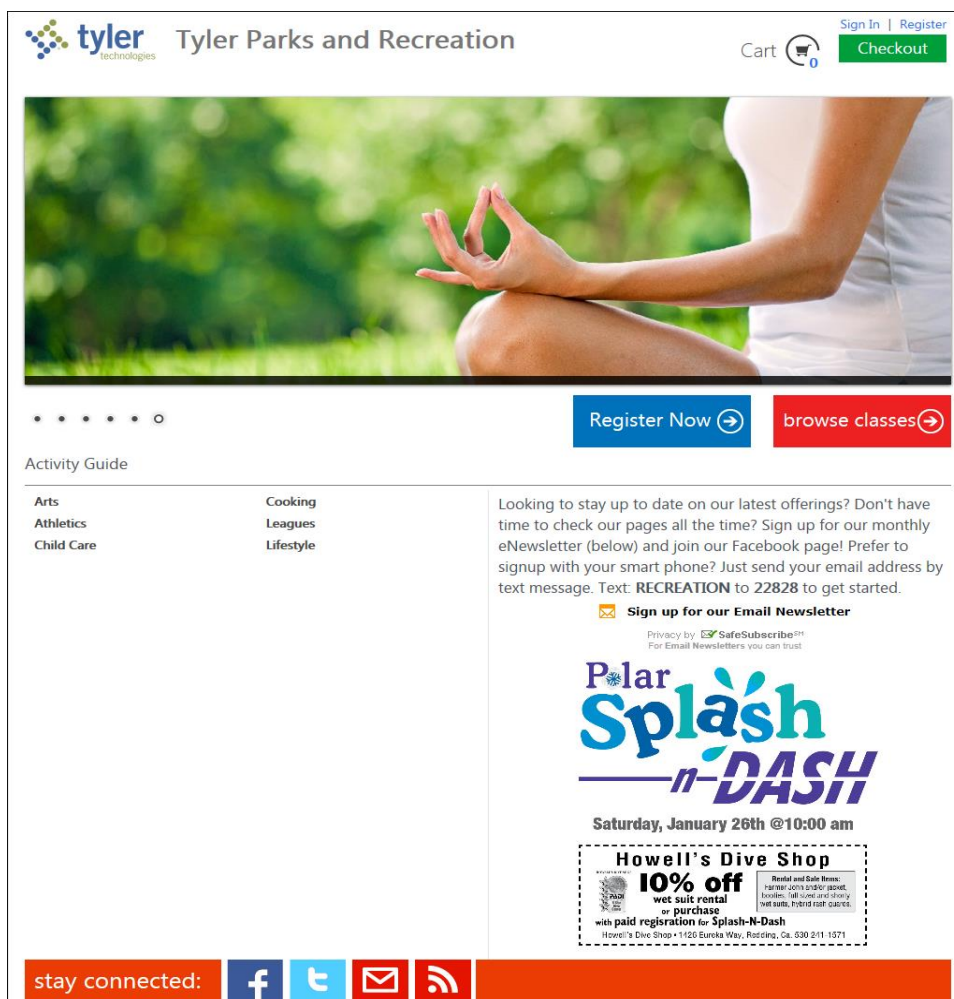
Use the horizontal scroll arrow to view all data for a specific enter. Click **Export** to export the results to Microsoft Excel.

# 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.



The screenshot shows the Tyler Parks and Recreation Citizen Portal. At the top, there is a header with the Tyler Technologies logo, the text "Tyler Parks and Recreation", and links for "Sign In" and "Register". Below the header is a large banner image of a person in a yoga pose. To the right of the banner are buttons for "Cart" and "Checkout". Below the banner are two buttons: "Register Now" and "browse classes". Below these buttons is an "Activity Guide" section with a grid of categories: Arts, Athletics, Child Care, Cooking, Leagues, and Lifestyle. To the right of the grid is a text block about staying up to date on offerings, a sign-up for an eNewsletter, and a promotion for "Polar Splash-N-DASH" on Saturday, January 26th at 10:00 am. Below the promotion is a box for "Howell's Dive Shop" offering a 10% off wet suit rental or purchase with paid registration for Splash-N-Dash. At the bottom, there is a "stay connected:" section with social media icons for Facebook, Twitter, Email, and RSS.

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

## 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](#)

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

System, Admin [Sign out](#)

## Contact Search

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

Search Contacts

Keyword

Gender  
- Select -

Registrant  
- Select -

Instructor  
- Select -

Resident  
- Select -

Contact Type  
- Select -



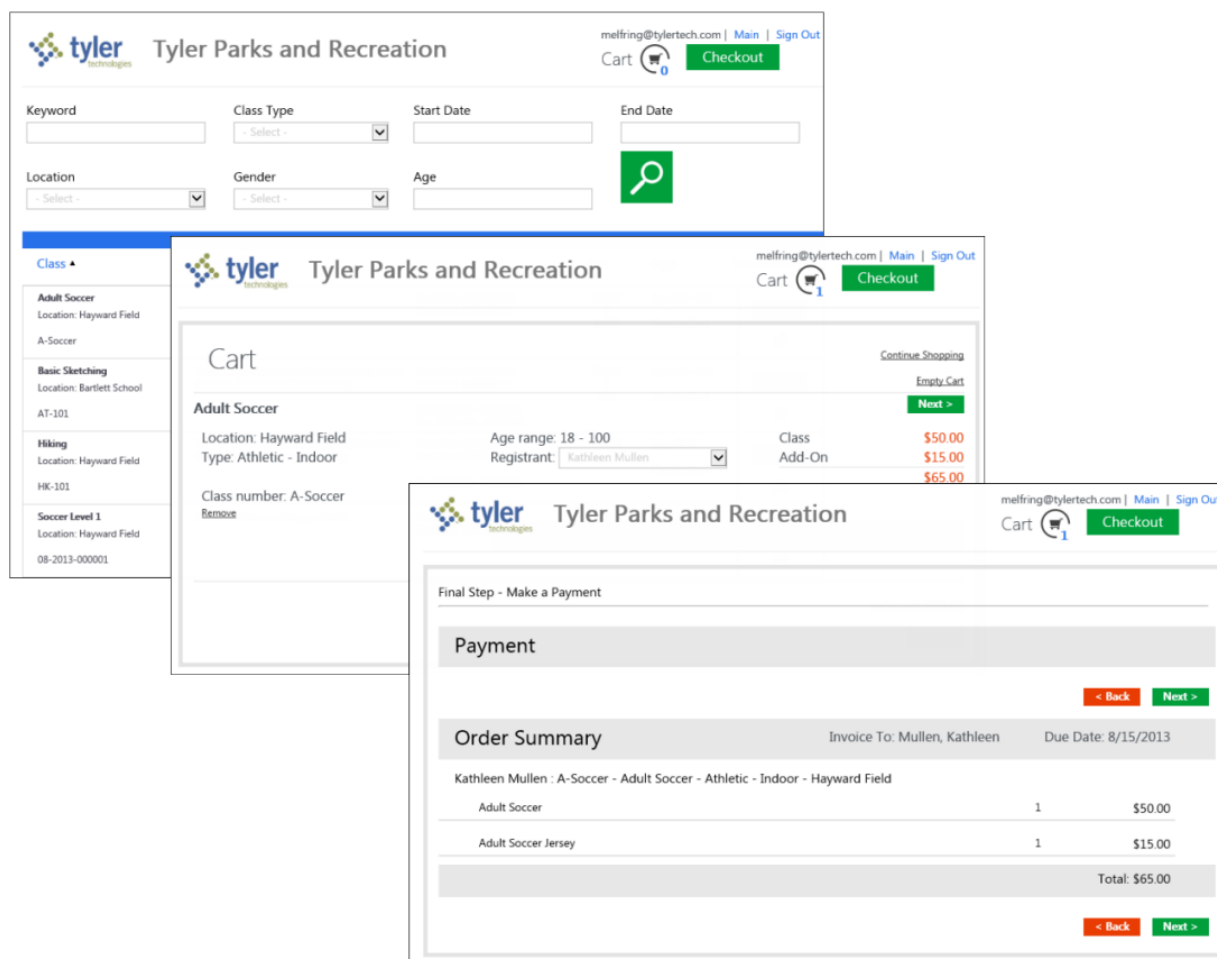
[Create](#)
[Export](#)

Contact Number	First Name	Last Name	Email Address	Gender	Contact Type	Registrant	Instructor	Resident		
08-2013-000004	Harriett	Jackson		Female	Parent/Guardian	No	No	No		
RES-08-2013-000009	Harry	Jackson	harryj@yahoo.com	Male		Yes	No	No		
RES-08-2013-000005	Jenny	Smith		Female	Instructor	No	Yes	No		
RES-08-2013-000007	Kate	Jones		Female	Instructor	No	Yes	No		

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.



The image displays three overlapping screenshots of the Tyler Parks and Recreation website interface, illustrating the user journey from search to payment.

**Top Screenshot (Search Page):** Shows the search interface with fields for Keyword, Class Type, Start Date, End Date, Location, Gender, and Age. A magnifying glass icon is used to initiate the search. The top navigation bar includes the Tyler Technologies logo, contact information (melfring@tylertech.com), and links for Main and Sign Out. A shopping cart icon shows 0 items.

**Middle Screenshot (Cart Page):** Shows the cart contents for an "Adult Soccer" class. The class details include Location: Hayward Field, Type: Athletic - Indoor, and Class number: A-Soccer. The registrant is Kathleen Mullen. The cart shows a base price of \$50.00, an add-on of \$15.00, and a total of \$65.00. Buttons for "Continue Shopping", "Empty Cart", and "Next >" are visible.

**Bottom Screenshot (Payment Page):** Shows the "Final Step - Make a Payment" screen. It includes an "Order Summary" table with the following items:

Item	Quantity	Price
Adult Soccer	1	\$50.00
Adult Soccer Jersey	1	\$15.00
<b>Total:</b>		<b>\$65.00</b>

The page also shows the invoice to: Mullen, Kathleen and the due date: 8/15/2013. Navigation buttons for "< Back" and "Next >" are present.

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.